

# Microsoft® Office Word 2007

## *on Demand*

Includes MCAS Exam Objectives

templates  
Quick Styles  
themes  
watermarks  
margins  
Quick Parts  
tables of contents  
indexes  
properties  
bookmarks  
hyperlinks  
autocorrect  
Quick Access toolbar  
styles  
Format Painter  
SmartArt graphics  
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citations  
track changes  
comments  
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Steve Johnson, Perspection, Inc.



# Microsoft® Office Word 2007 On Demand

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**Steve Johnson**

**Perspection, Inc.**

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800 East 96th Street  
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# Microsoft® Office Word 2007 On Demand

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Library of Congress Cataloging-in-Publication Data is on file.

ISBN 0-7897-3644-6

Printed and bound in the United States of America

First Printing: January 2007

10 09 08 07            4 3 2 1

Que Publishing offers excellent discounts on this book when ordered in quantity for bulk purchases or special sales.

For information, please contact: U.S. Corporate and Government Sales

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# Acknowledgements

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## Acknowledgements

The task of creating any book requires the talents of many hard-working people pulling together to meet impossible deadlines and untold stresses. We'd like to thank the outstanding team responsible for making this book possible: the writer, Steve Johnson; the technical editor, Holly Johnson; the production editor, James Teyler; and the indexer, Katherine Stimson. We'd also like to thank Gary and Lisa O'Neal for their support and encouragement.

At Que publishing, we'd like to thank Greg Wiegand and Stephanie McComb for the opportunity to undertake this project, Michelle Newcomb for administrative support, and Sandra Schroeder for your production expertise and support.

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A large, light gray lowercase letter 'a' is positioned on the left side of the page, partially overlapping the gray vertical bar.

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# Introduction

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Welcome to *Microsoft Office Word 2007 On Demand*, a visual quick reference book that shows you how to work efficiently with Microsoft Office Word. This book provides complete coverage of basic to advanced Word skills.

## How This Book Works

You don't have to read this book in any particular order. We've designed the book so that you can jump in, get the information you need, and jump out. However, the book does follow a logical progression from simple tasks to more complex ones. Each task is presented on no more than two facing pages, which lets you focus on a single task without having to turn the page. To find the information that you need, just look up the task in the table of contents or index, and turn to the page listed. Read the task introduction, follow the step-by-step instructions in the left column along with screen illustrations in the right column, and you're done.

## What's New

If you're searching for what's new in Word 2007, just look for the icon: **New!**. The new icon appears in the table of contents and through out this book so you can quickly and easily identify a new or improved feature in Word 2007. A complete description of each new feature appears in the New Features guide in the back of this book.

## Keyboard Shortcuts

Most menu commands have a keyboard equivalent, such as Ctrl+P, as a quicker alternative to using the mouse. A complete list of keyboard shortcuts is available on the Web at [www.perspection.com](http://www.perspection.com).



## How You'll Learn

**How This Book Works**

**What's New**

**Keyboard Shortcuts**

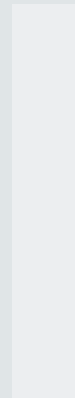
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**Real World Examples**

**Workshop**

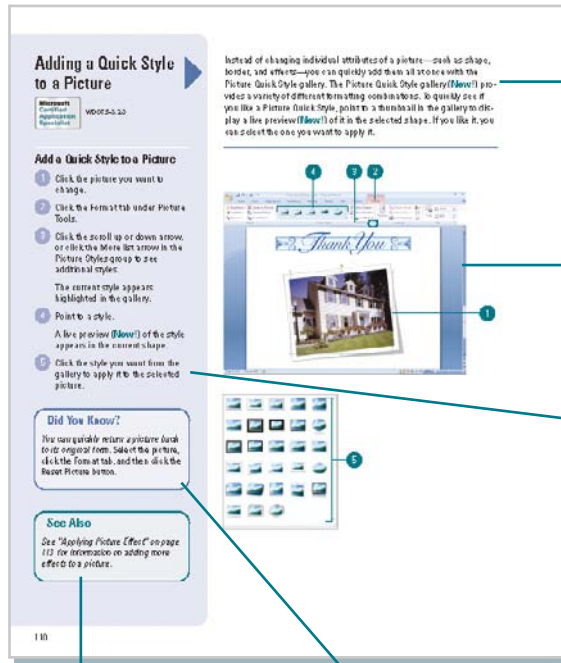
**Microsoft Certified Applications Specialist**

**Get More on the Web**



# Step-by-Step Instructions

This book provides concise step-by-step instructions that show you “how” to accomplish a task. Each set of instructions include illustrations that directly correspond to the easy-to-read steps. Also included in the text are time-savers, tables, and sidebars to help you work more efficiently or to teach you more in-depth information. A “Did You Know?” provides tips and techniques to help you work smarter, while a “See Also” leads you to other parts of the book containing related information about the task.



Easy-to-follow introductions focus on a single concept.

Illustrations match the numbered steps.

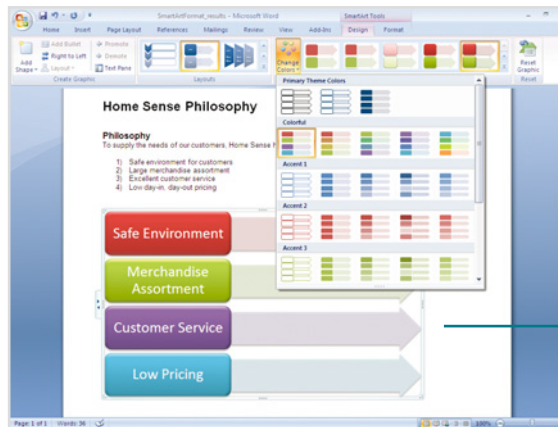
Numbered steps guide you through each task.

See Also points you to related information in the book.

Did You Know? alerts you to tips, techniques and related information.

# Real World Examples

This book uses real world examples files to give you a context in which to use the task. By using the example files, you won't waste time looking for or creating sample files. You get a start file and a result file, so you can compare your work. Not every topic needs an example file, such as changing options, so we provide a complete list of the example files used through out the book. The example files that you need for project tasks along with a complete file list are available on the Web at [www.perspective.com](http://www.perspective.com).



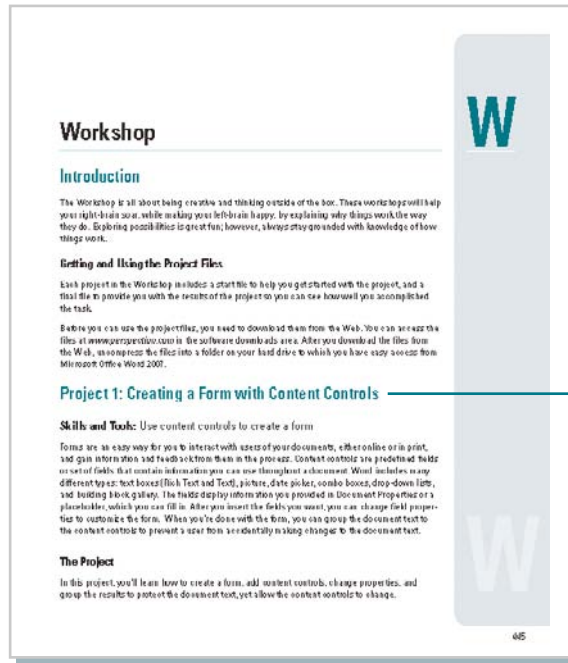
Real world examples help you apply what you've learned to other tasks.

# Workshop

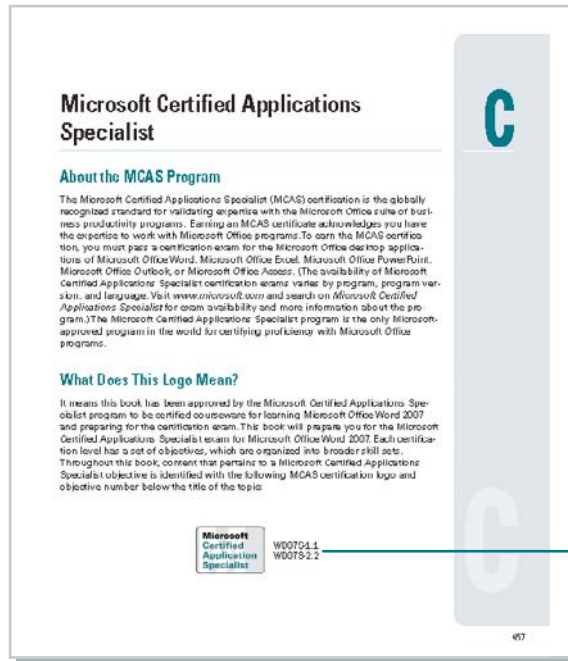
This book shows you how to put together the individual step-by-step tasks into indepth projects with the Workshop. You start each project with a sample file, work through the steps, and then compare your results with project results file at the end. The Workshop projects and associated files are available on the Web at [www.perspection.com](http://www.perspection.com).

# Microsoft Certified Applications Specialist

This book prepares you for the Microsoft Certified Applications Specialist (MCAS) exam for Microsoft Office Word 2007. Each MCAS certification exam has a set of objectives, which are organized into broader skill sets. To prepare for the certification exam, you should review and perform each task identified with a MCAS objective to confirm that you can meet the requirements for the exam. Throughout this book, content that pertains to an objective is identified with the following MCAS logo and objective number next to it.



The Workshop walks you through indepth projects to help you put Word to work.



Logo indicates a task fulfills one or more MCAS certification objectives.

## Get More on the Web

In addition to the information in this book, you can also get more information on the Web to help you get up to speed faster with Word 2007. Some of the information includes:

## Transition Helpers

- ◆ **Only New Features.** Download and print the new feature tasks as a quick and easy guide.

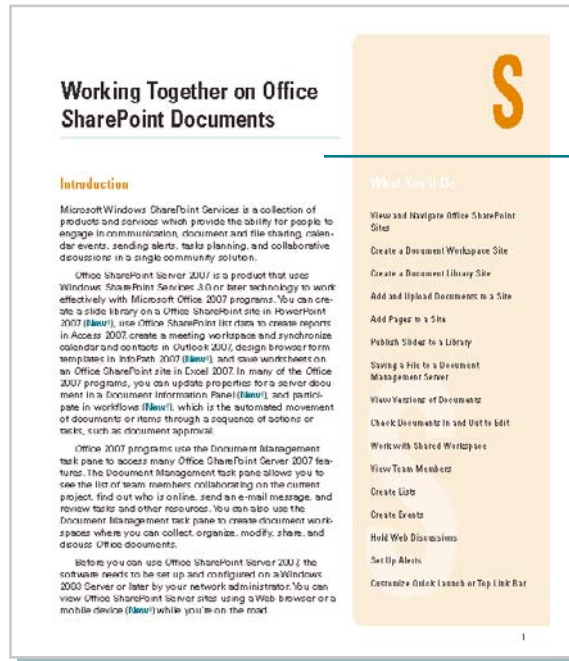
## Productivity Tools

- ◆ **Keyboard Shortcuts.** Download a list of keyboard shortcuts to learn faster ways to get the job done.

## More Content

- ◆ **Photographs.** Download photographs and other graphics to use in your Office documents.
- ◆ **More Content.** Download new content developed after publication. For example, you can download a complete chapter on Office SharePoint Server 2007.

You can access these additional resources on the Web at [www.perspective.com](http://www.perspective.com).



Additional content is available on the Web. You can download a chapter on SharePoint.

# Getting Started with Word

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## Introduction

Microsoft Office Word 2007 is a powerful word-processing program that enables you to easily compose and edit documents for print or online use. Word 2007 contains many new tools specifically designed to improve the way you interact with the program, and the way you collaborate with one another in preparing documents.

This chapter introduces you to the terminology and the basic Word skills you use in the program. In Word, files are called **documents**. Each new document is similar to a blank page. As you type and add additional text and other objects, your document gets longer. Unlike looking at a piece of paper, Word provides many views, such as the Reading Layout view, that helps you see the document in the best possible way for the task at hand.

With the results-oriented visual interface, you navigate through various tasks with a click of the mouse, or by using shortcut keys on your keyboard. Microsoft Office Word is set up with a tab-based Ribbon (**New!**) and dialog boxes that provide you with the tools you need when you need them to get the job done. The customizable Quick Access Toolbar (**New!**) gives you easy access to commonly-used commands, such as Save and Print. When working with your documents, you can view more than one document, or resize the window to compare data. Moving around in your document is made easy by the browsing function in Word. With a click of a button, you are on your way to browsing your document in various ways—by footnote, graphic, or comments, to name a few.

When you finish the design of your document, you can save it in the default XML-based format (**New!**) or another format; a Web page for example, to use in another office program. Microsoft also offers the Office Online Web site, a resource to check for updates and information on Word.

## What You'll Do

**Start Word**

**View the Word Window**

**Use the Ribbon and Choose Commands**

**Work with Toolbars**

**Choose Dialog Box Options**

**Use the Status Bar**

**Use Task and Window Panes**

**Open an Existing Document**

**Open Files of Different Types**

**Convert an Existing Document**

**Change Document Views**

**Read a Document**

**Get Help While You Work**

**Save a Document**

**Save a Document with Different Formats**

**Check Compatibility**

**Document Properties**

**Zoom the View In and Out**

**Get Updates on the Web**

**Recover a Document**

**Diagnose and Repair Problems**

**Close a Document and Exit Word**

# Starting Word

## Start Word

- 1 Click the **Start** button on the taskbar.
- 2 Point to **All Programs**.
- 3 Click **Microsoft Office**.
- 4 Click **Microsoft Office Word 2007**.

If Microsoft Office asks you to activate the program, follow the instructions to complete the process.

**TIMESAVER** To activate Microsoft Office later, click the Office button, click Word Options, click Resources, and then click Activate.

If a Privacy dialog box appears, select the options you want, and then click OK.

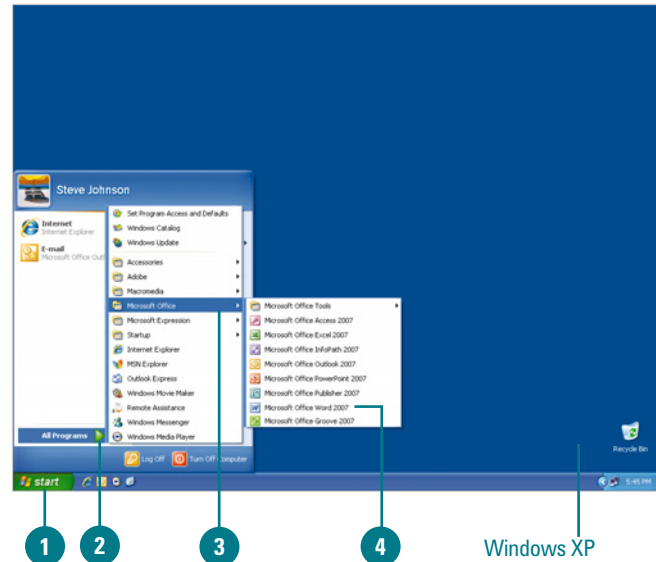
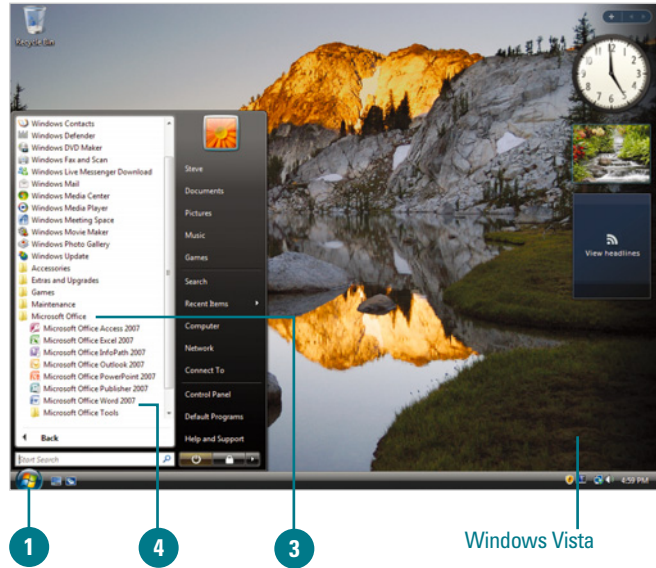
## Did You Know?

**You can create a program shortcut from the Start menu to the desktop.**

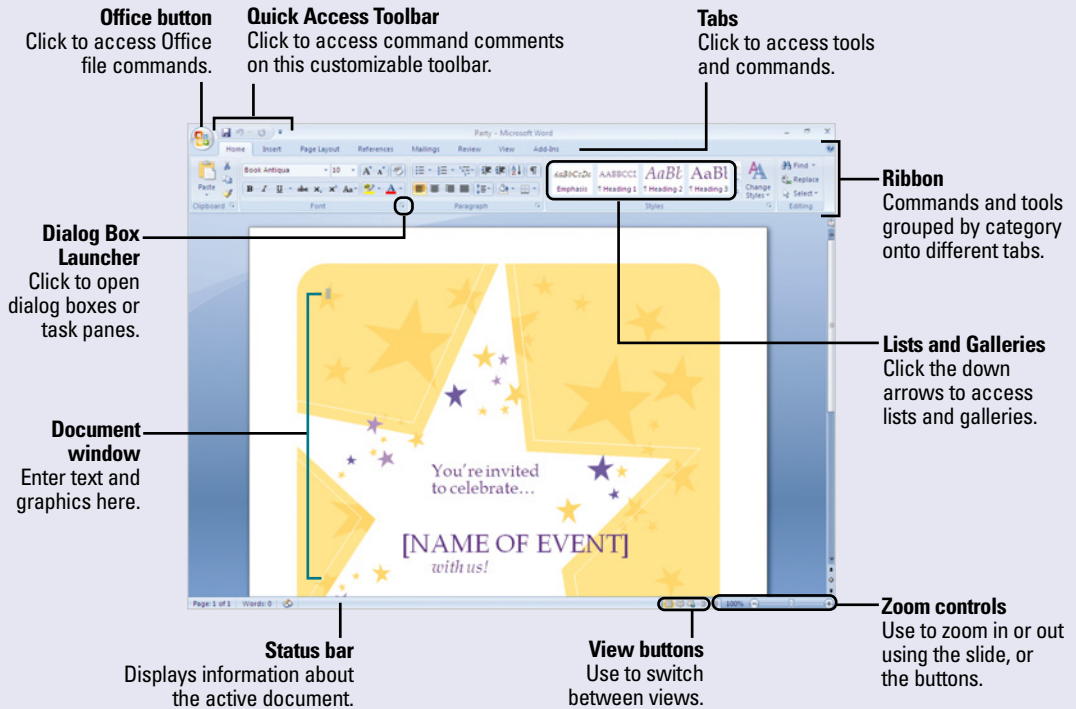
Click the Start menu, point to All Programs, click Microsoft Office, right-click Microsoft Office Word 2007, point to Send To, and then click Desktop (Create Shortcut).

**You can start Word and open a document from Windows Explorer.** Double-clicking any Word document icon in Windows Explorer opens that file and Word.

The two quickest ways to start the Microsoft Office Word 2007 program are to select it on the Start menu or double-click a shortcut icon on the desktop. By providing different ways to start a program, Office lets you work the way you like and start programs with a click of a button. When you start Word, a program window opens, displaying a blank document, where you can begin working immediately.



# Viewing the Word Window



# Using the Ribbon

The **Ribbon (New!)** is a new look for Word 2007. It replaces menus, toolbars, and most of the task panes found in Word 2003. The Ribbon is located at the top of the document window and is comprised of **tabs (New!)** that are organized by task or objects. The controls on each tab are organized into **groups**, or subtasks. The controls, or **command buttons**, in each group execute a command, or display a menu of commands or a drop-down gallery. Controls in each group provide a visual way to quickly make document changes.

**TIMESAVER** *To minimize the Ribbon, double-click the name of the tab that is displayed, or click the Customize Quick Access Toolbar list arrow, and then click Minimize the Ribbon. Click a tab to auto display it (Ribbon remains minimized). Double-click a tab to maximize it.*

If you prefer using the keyboard instead of the mouse to access commands on the Ribbon, Microsoft Word provides easy to use shortcuts. Simply press and release the **Alt** or **F10** key to display **KeyTips (New!)** over each feature in the current view, and then continue to press the letter shown in the KeyTip until you press the one that you want to use. To cancel an action and hide the KeyTips, press and release the **Alt** or **F10** key again. If you prefer using the keyboard shortcuts found in pre-

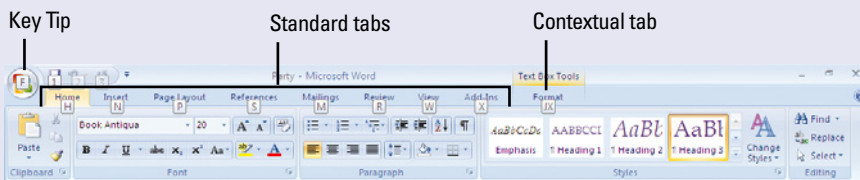
vious versions of Microsoft Word, such as Ctrl+P (for Print), all the keyboard shortcuts and keyboard accelerators work exactly the same in Microsoft Office Word 2007. Office Word 2007 includes a legacy mode that you can turn on to use familiar Office Word 2003 keyboard accelerators.

## Tabs

Word provides three types of tabs on the Ribbon. The first type is called a **standard** tab—such as Home, Insert, Review, View, and Add-Ins—that you see whenever you start Word. The second type is called a **contextual** tab—such as Picture Tools, Drawing, or Table—that appear only when they are needed based on the type of task you are doing. Word recognizes what you're doing and provides the right set of tabs and tools to use when you need them. The third type is called a **program** tab—such as Print Preview—that replaces the standard set of tabs when you switch to certain views or modes.

## Live Preview

When you point to a gallery option, such as WordArt, on the Ribbon, Word displays a **live preview (New!)** of the option change so that you can see exactly what your change will look like before committing to it.



# Choosing Commands

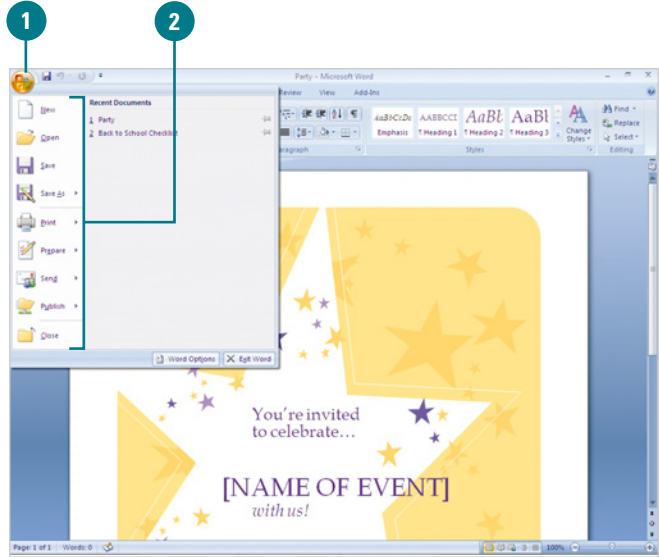
## Choose a Command from the Office Menu

- 1 Click the **Office** button on the Ribbon.
- 2 Click the command you want.

If the command is followed by an arrow, point to the arrow to see a list of related options, and then click the option you want.

**TIMESAVER** You can use a shortcut key to choose a command. Press and hold down the first key and then press the second key. For example, press and hold the **Ctrl** key and then press **S** (or **Ctrl+S**) to select the **Save** command.

The Word commands are organized in groups on the Ribbon, Office menu (**New!**), Quick Access Toolbar, and Mini-Toolbar. The Office button opens to display file related menu commands, while the Quick Access Toolbar and Mini-Toolbar display frequently used buttons that you may be already familiar with from Word 2003. In addition to the Office menu, you can also open a **shortcut menu** with a group of related commands by right-clicking a program element.

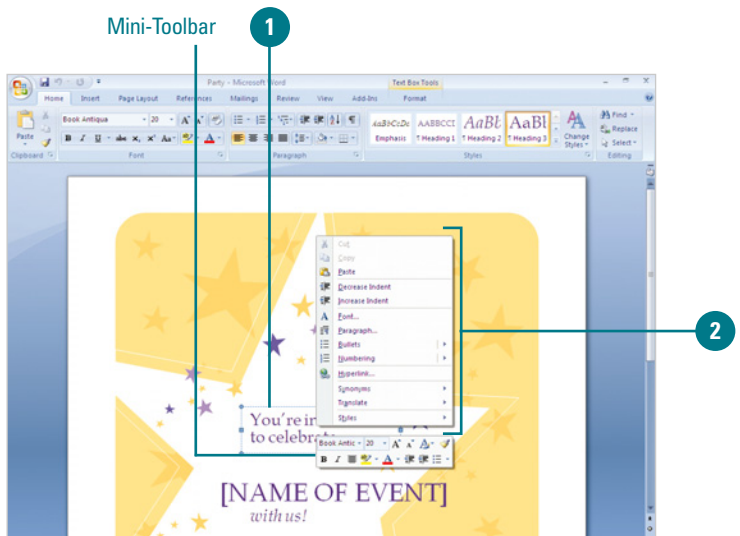


## Choose a Command from a Shortcut Menu

- 1 Right-click an object or element.

**TIMESAVER** Press **Shift+F10** to display the shortcut menu for a selected command.

- 2 Click a command on the shortcut menu. If the command is followed by an arrow, point to the command to see a list of related options, and then click the option you want.



# Working with Toolbars

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## Choose a Command Using a Toolbar or Ribbon

- ◆ **Get command help.** If you're not sure what a button does, point to it to display a ScreenTip. If the ScreenTip includes *Press F1 for more help*, press F1.
- ◆ **Choose a command.** Click the button, or button arrow, and then click a command or option.

### Did You Know?

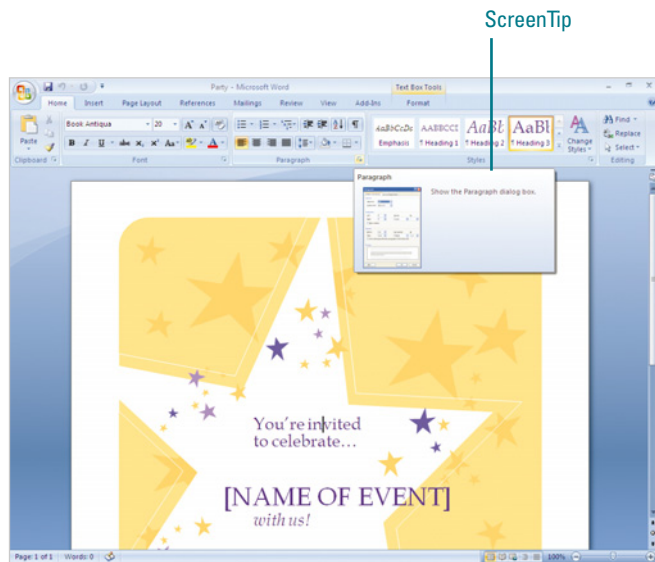
**You can move the Quick Access Toolbar to another location.** Click the Customize Quick Access Toolbar list arrow, and then click Show Below the Ribbon or Show Above the Ribbon.

**You can turn off or change ScreenTips.** Click the Office button, click Word Options, click Popular, click the ScreenTip style list arrow, click Don't show feature descriptions in ScreenTips or Don't show ScreenTips, and then click OK.

**You can reset the Quick Access Toolbar to its original state.** In the Options dialog box, click Customize, click Reset, and then click OK.

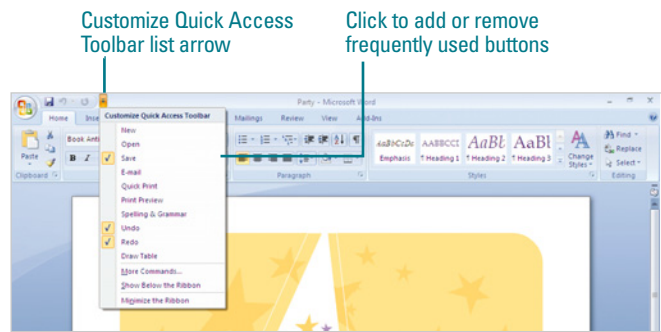
**You can minimize the Ribbon.** Click the Customize Quick Access Toolbar list arrow, and then click Minimize the Ribbon. Click a tab to maximize it.

Word includes its most common commands, such as Save and Undo, on the **Quick Access Toolbar (New!)**. Click a toolbar button to choose a command. If you are not sure what a toolbar button does, point to it to display a ScreenTip. When Word starts, the Quick Access Toolbar appears at the top of the window, unless you've changed your settings. You can customize the toolbar by adding command buttons or groups to it. You can also move the toolbar below or above the Ribbon so it's right where you need it. In addition to the Quick Access Toolbar, Word also displays the Mini-Toolbar when you point to selected text. The **Mini-Toolbar (New!)** appears above the selected text and provides quick access to formatting tools.



## Add or Remove Items from the Quick Access Toolbar

- ◆ **Add or remove a common button.** Click the Customize Quick Access Toolbar list arrow, and then click a button name (checked item appears on the toolbar).
- ◆ **Add a Ribbon button or group.** Right-click the button or group name on the Ribbon, and then click Add to Quick Access Toolbar.
- ◆ **Remove a button or group.** Right-click the button or group name on the Quick Access Toolbar, and then click Remove from Quick Access Toolbar.



## Customize the Quick Access Toolbar

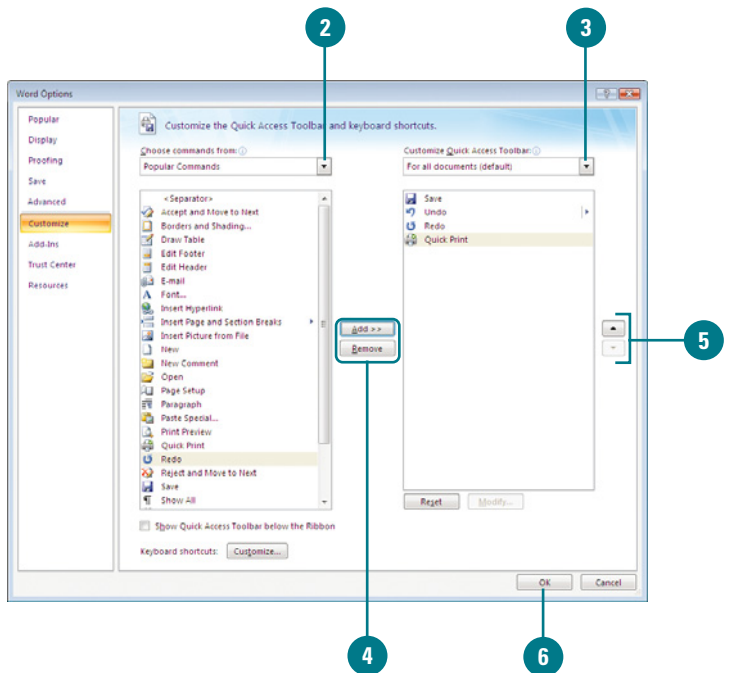
- 1 Click the **Customize Quick Access Toolbar** list arrow, and then click **More Commands**.
- 2 Click the **Choose commands from** list arrow, and then click **All Commands** or a specific Ribbon.
- 3 Click the **Customize Quick Access Toolbar** list arrow, and then click **For all documents (default)**.

Select the current document if you only want the commands available in the document.

- 4 Click the command you want to add (left column) or remove (right column), and then click **Add** or **Remove**.

**TIMESAVER** Click <Separator>, and then click Add to insert a separator line between buttons.

- 5 Click the **Move Up** and **Move Down** arrow buttons to arrange the order.
- 6 Click **OK**.



# Choosing Dialog Box Options

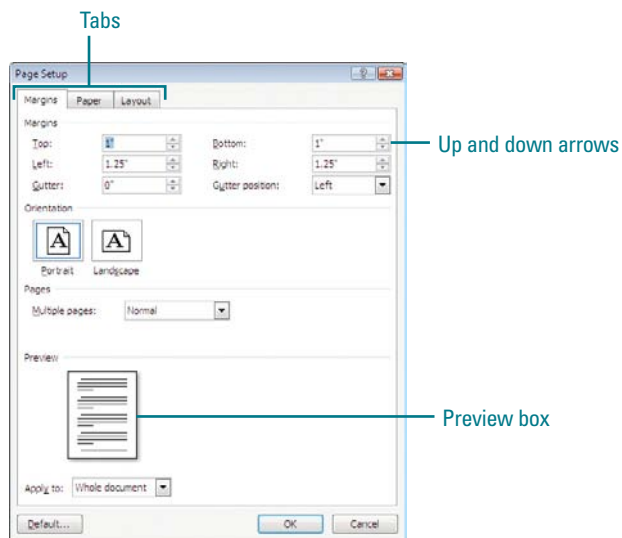
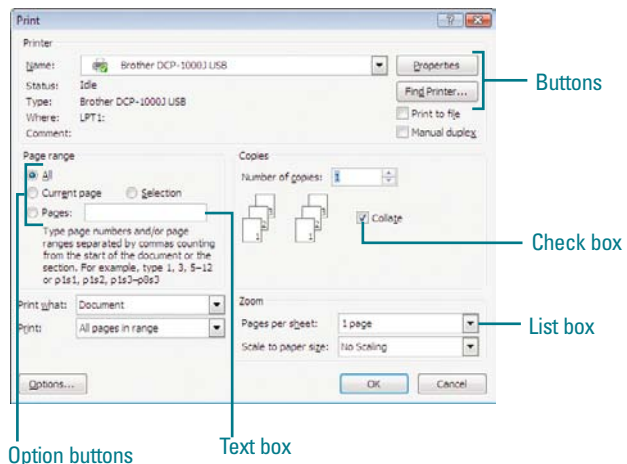


A **dialog box** is a window that opens when you click a Dialog Box Launcher. **Dialog Box Launchers (New!)** are small icons that appear at the bottom corner of some groups. When you point to a Dialog Box Launcher, a ScreenTip with a thumbnail of the dialog box appears to show you which dialog box opens (**New!**). A dialog box allows you to supply more information before the program carries out the command you selected. After you enter information or make selections in a dialog box, click the OK button to complete the command. Click the Cancel button to close the dialog box without issuing the command. In many dialog boxes, you can also click an Apply button to apply your changes without closing the dialog box. Rather than clicking to move around a dialog box, you can press the Tab key to move from one box or button to the next. You can also use Shift+Tab to move backward, or Ctrl+Tab and Ctrl+Shift+Tab to move between dialog box tabs.

## Choose Dialog Box Options

All dialog boxes contain the same types of options, including the following:

- ◆ **Tabs.** Each tab groups a related set of options. Click a tab to display its options.
- ◆ **Option buttons.** Click an option button to select it. You can usually only select one.
- ◆ **Up and down arrows.** Click the up or down arrow to increase or decrease the number, or type a number in the box.
- ◆ **Check box.** Click the box to turn on or off the option. A checked box means the option is selected; a cleared box means it's not.
- ◆ **List box.** Click the list arrow to display a list of options, and then click the option you want.
- ◆ **Text box.** Click in the box and type the requested information.
- ◆ **Button.** Click a button to perform a specific action or command. A button name followed by an ellipsis (...) opens a dialog box.
- ◆ **Preview box.** Many dialog boxes show an image that reflects the options you select.



## Using the Status Bar

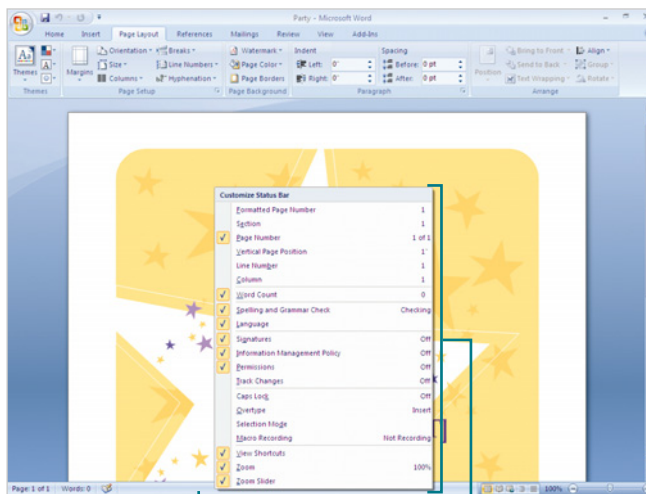
### Add or Remove Items from the Status Bar

- ◆ **Add Item.** Right-click the Status bar, and then click an unchecked item.
- ◆ **Remove Item.** Right-click the Status bar, and then click a checked item.

#### See Also

See “Adding a Digital Signature” on page 406 or “Recording a Macro” on page 401 for information on changing the status of items on the Status bar.

The **Status bar** appears across the bottom of your screen and displays document information—such as word count, page numbers, language, and current display zoom percentage—and some Word program controls, such as view shortcut buttons, zoom slider, and Fit To Window button. With the click of the mouse, you can quickly customize exactly what you see on the Status bar (**New!**). In addition to displaying information, the Status bar also allows you to check the on/off status of certain features (**New!**), such as Signatures, Permissions, Selection Mode, Page Number, Caps Lock, Num Lock, Macro Recording and Playback, and much more.



Right-click the Status bar

Status information

# Using Task and Window Panes

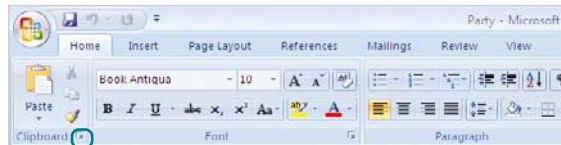
## Work with Task and Window Panes

- ◆ **Open a Task Pane.** It appears when you need it or when you click a Dialog Box Launcher icon.
- ◆ **Close a Task or Window Pane.** Click the Close button in upper-right corner of the pane.
- ◆ **Resize a Task Pane.** Point to the Task Pane border edge until the pointer changes to double arrows, then drag the edge to resize it.
- ◆ **Resize a Window Pane.** Point to the window pane border bar until the pointer changes to a double bar with arrows, then drag the edge to resize it.

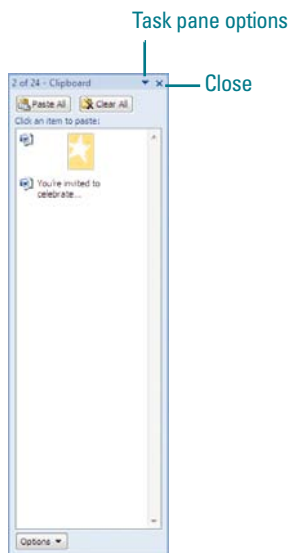
### Did You Know?

**You can insert window panes.** Click the View tab, click the Split button in the Window group.

**Task panes** are separate windows that appear when you need them, such as Document Recovery, or when you click a Dialog Box Launcher icon (**New!**), such as Clipboard and Clip Art. A task pane displays various options that relate to the current task. **Window panes** are sections of a window, such as a split window. If you need a larger work area, you can use the Close button in the upper-right corner of the pane to close a task or window pane, or move a border edge (for task panes) or **splitter** (for window panes) (**New!**) to resize it.



Click to open task pane



## Move Task Panes

1 Open the task pane you want to move.

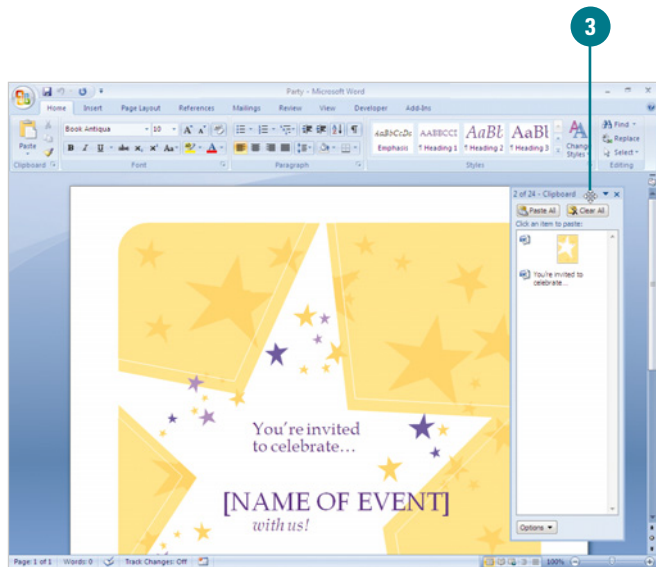
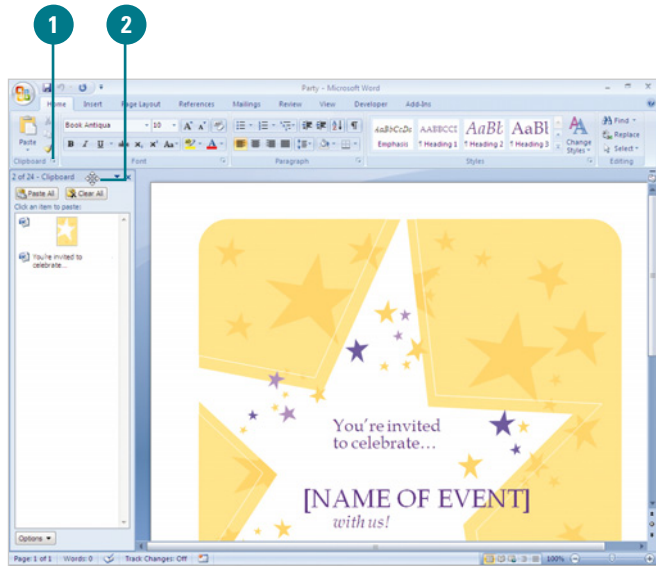
2 Point to the title bar.

The cursor changes to a 4-headed arrow.

3 Drag the task pane to a new location.

The task pane becomes undocked.

4 To redock a task pane, drag the task pane to the left or right side of the program window. Keep dragging until the task pane snaps into place.

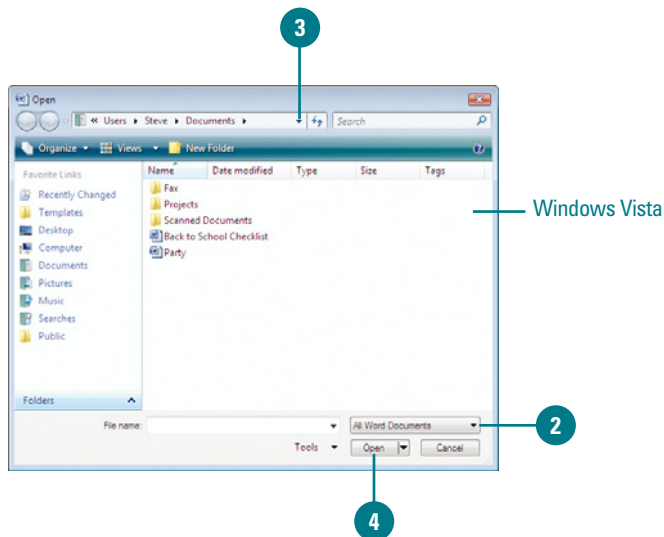


# Opening an Existing Document

## Open a Document from the Program Window

- 1 Click the **Office** button, and then click **Open**, or click a recently used document.
- 2 If you want to open a specific file type, click the **Files of type** list arrow, and then click a file type.
- 3 If the file is located in another folder, click the **Look In** list arrow, and then navigate to the file.
- 4 Click the Word file you want, and then click **Open**, or click the **Open** button arrow, and then click one of the following options:
  - ◆ **Open Read-Only** to open the selected file with protection.
  - ◆ **Open as Copy** to open a copy of the selected file.
  - ◆ **Open in Browser** to open the selected Web file in a browser.
  - ◆ **Open with Transform** to open the selected XML file with transform.
  - ◆ **Open and Repair** to open the damaged file.
  - ◆ **Show previous versions** to show previous versions of Word documents.

You can open a Word document and start Word simultaneously, or you can open a Word document or file created in another program after you start Word. You can open an existing Word document by using the Office button. On the Office menu, you can choose the Open command to locate and select the document you want or choose a recently used document from the Recent Documents list. Similar to the Windows Start menu, the Recent Documents list allows you to pin documents (**New!**) to the list that you want to remain accessible regardless of recent use. The Pin icon to the right of the file name on the Office menu makes it easy to pin or unpin as needed.



## For Your Information

### Using the Office Program Viewer

An Office program Viewer—PowerPoint, Word, and Excel—is a program used to open and view Office documents on computers that don't have Microsoft Office installed. The Office program Viewer is available for download from the Microsoft Office Online Web site in the downloads section. Check the Microsoft Web site for software requirements.

## Open a Recently Opened Documents

- 1 Click the **Office** button.
- 2 Click the document you want to open.
  - ◆ **Pin a document.** Click the Pin icon (right-side) to display a green pin (document is pinned) on the Recent Documents list.
  - ◆ **Unpin a document.** Click the Pin icon (right-side) to display a grey pin on the Recent Documents list.

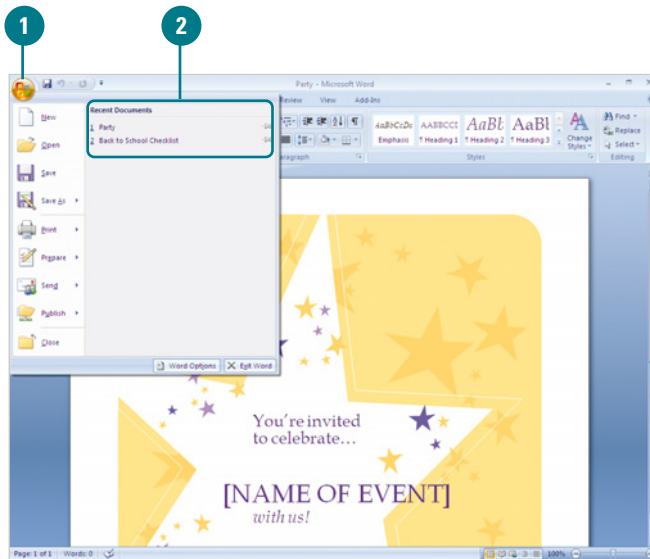
### Did You Know?

**You can change the number of recently opened files that appear on the Office menu.** Click the Office button, click Word Options, click Advanced, and then change the Number of documents in the Recent Documents list, and then click OK.

**You can change the default file location of the Open dialog box.** Click the Office button, click Word Options, click Save, enter a new location in the Default File Location box, and then click OK.

**You can delete or rename a file in a dialog box.** In the Open or Save As dialog box, click the file, click the Tools list arrow, and then click Delete or Rename.

**You can quickly move or copy a file in a dialog box.** In the Open or Save As dialog box, right-click the file you want to move or copy, click Cut or Copy, open the folder where you want to paste the file, right-click a blank area, and then click Paste.

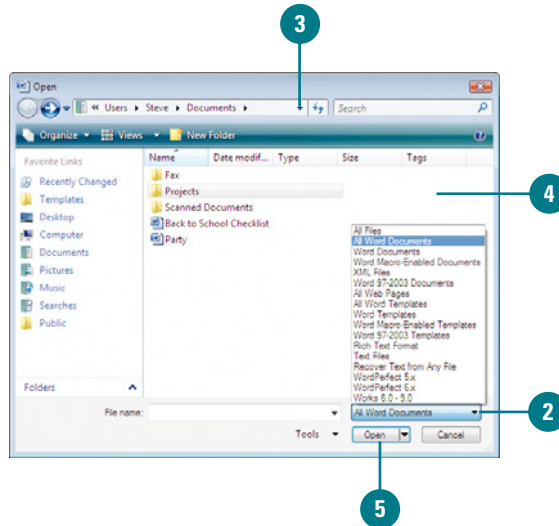


# Opening Files of Different Types

## Open a File in a Non-Word Format

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **Files of type** list arrow, and then select the type of file that you want to open.
- 3 Click the **Look in** list arrow, and then navigate to the file.
- 4 Select the document file you want to open.
- 5 Click **Open**.

Word recognizes and can open files created in a wide variety of other programs including, but not limited to: Lotus 1-2-3, WordPerfect, Windows Write, Excel, Outlook, Schedule, and Microsoft Works. When you open a document that was created in an older version of Word, Word opens it automatically into the current version.



# Converting an Existing Document

## Convert a Word 97-2003 Document to Word 2007

- 1 Open the Word document 97-2003 you want to convert to the Word 2007 file format.

The Word 97-2003 document opens in compatibility mode.

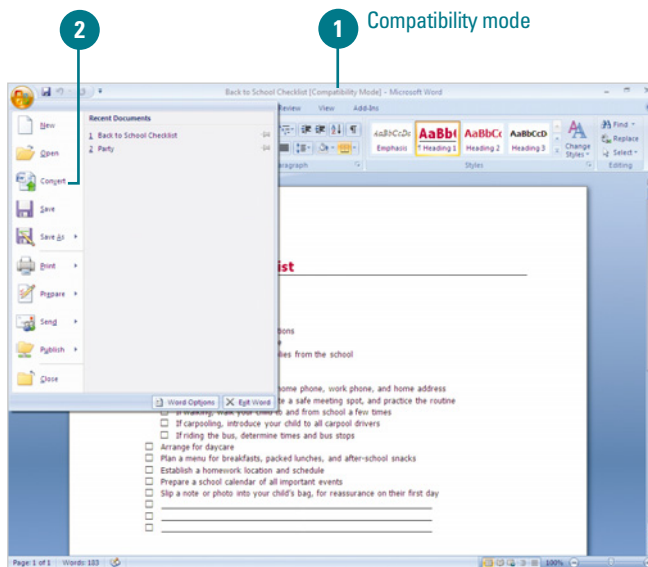
- 2 Click the **Office** button, and then click **Convert**.
- 3 Click **OK** to convert the file to Word 2007 format.

Word exits compatibility mode, which is only turned on when a previous version is in use.

### Did You Know?

*You can display extensions in the Save and Open dialog boxes and Recent Documents list.* Changing the Windows option also changes Word. In the Folder Options dialog box on the View tab, clear the Hide extensions for known file types check box.

When you open a document from Word 97-2003, Word 2007 goes into compatibility mode (**New!**)—indicated on the title bar—where it disables new features that cannot be displayed or converted well by previous versions. When you save a document, Word 2007 programs save Word 97-2003 files in their older format using compatibility mode (**New!**). The document stays in compatibility mode until you convert it to the Word 2007 file format.



# Changing Document Views



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Word displays the contents of a document in different ways to help you work efficiently with your content. The available views include: Print Layout, Full Screen Reading, Web Layout, Outline, and Draft. You can change the window view from the View tab, or you can click a Document view button at the bottom right corner of the Word window.

**Print Layout** view displays a gray gap between each page to clearly delineate where each actual page break occurs. Word displays each new document in Print Layout view by default. This view is best for previewing your work before printing, and it works well with the Zoom feature on the View tab to increase and decrease the page view size and display multiple pages of the same document simultaneously onscreen.

**Full Screen Reading** view displays the full screen and removes distracting screen elements to provide a more comfortable view to read your documents. You can also display the Thumbnail pane or the Document Map to

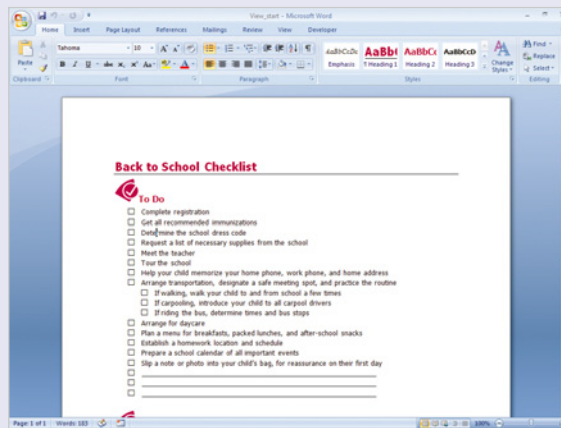
quickly jump to different parts of your document. When you're done, you can use the Close button.

**Web Layout** view displays the document as it will appear on the Web. You can save documents as HTML code to make Web content creation easy.

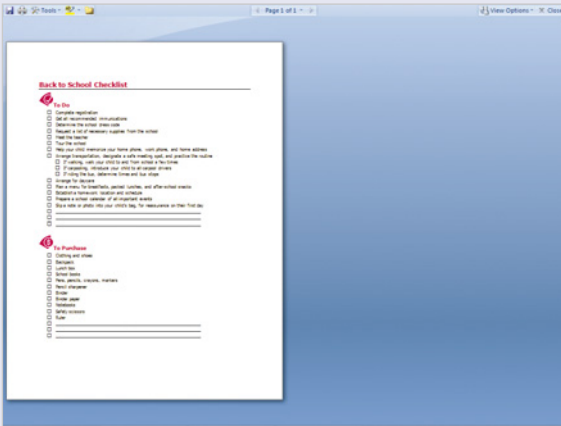
**Outline** view displays the document as an outline with headings and subheadings. When you shift to Outline view, each heading has a clickable plus or minus sign next to it to expand or collapse the content under the heading. You can drag a plus, or minus sign to move the heading and all of its associated text.

**Draft** view displays the document as a single, long piece of "paper," divided into pages by perforation marks. This view is fine for composition but inadequate for editing or previewing your work prior to printing or other publication.

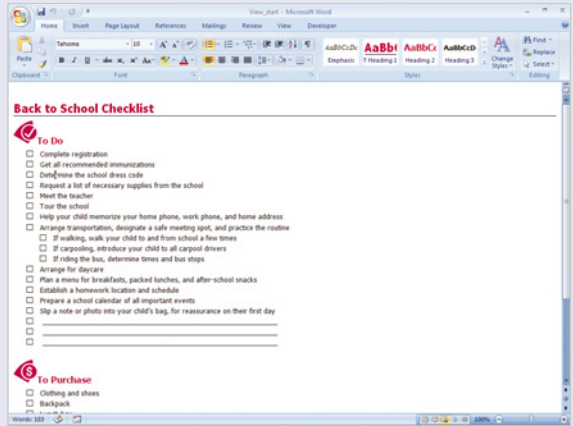
## Print Layout view



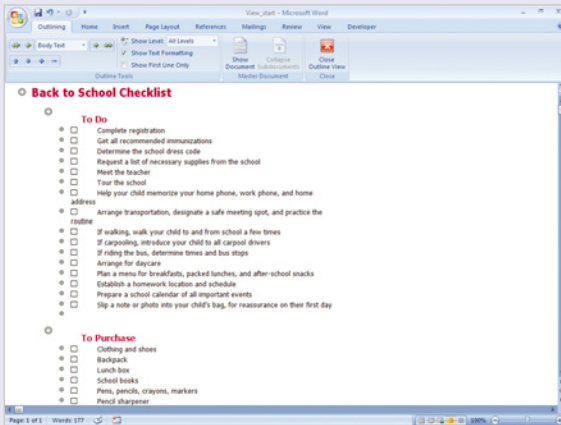
## Full Screen Reading view



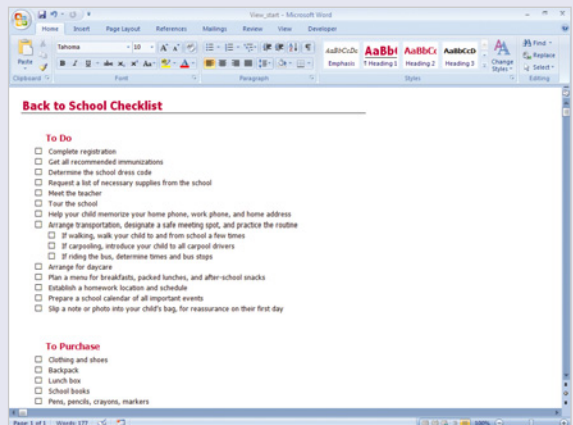
## Web Layout view



## Outline view



## Draft view



# Reading a Document

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## Read a Document

- 1 Click the **Full Screen Reading View** button.
- 2 To display the text in a larger or smaller size, click the **View Options** button, and then click **Increase Text Size** or **Decrease Text Size**.
- 3 To display two pages at once or a single page, click the **View Options** button, and then click **Show One Page** or **Show Two Pages**.

**TIMESAVER** Press *Esc* to deselect the document, type a number, and then press *Enter* to go to a page.

- 4 When you're done, click the **Close** button.

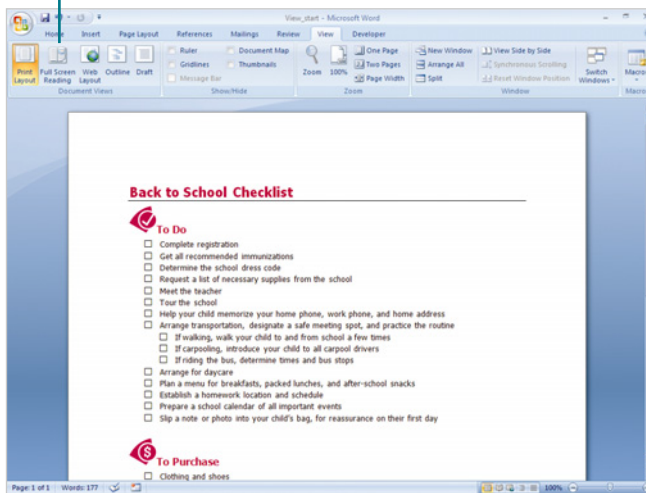
### Did You Know?

**You can disable open e-mail attachments in Full Screen Reading view.**

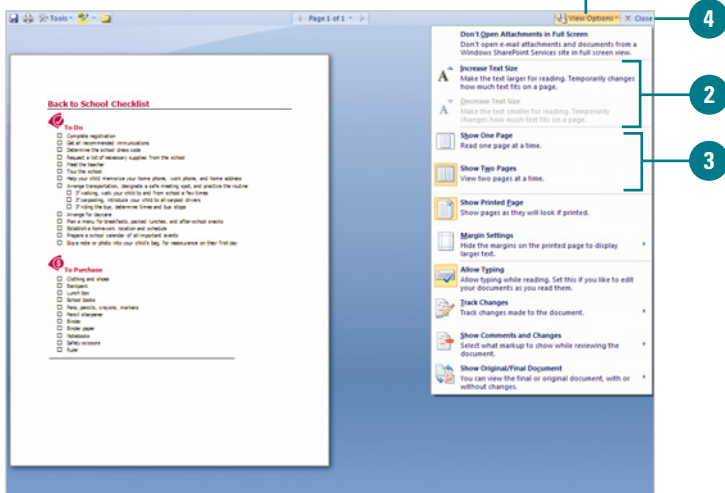
Click the Office button, click Options, click Popular, clear the Open e-mail attachments in Full Screen Reading view check box, and then click OK.

You can avoid eye strain when you want to read a document with the Full Screen Reading view. The Full Screen Reading view is designed with tools optimized for reading a document. Word changes the screen size and removes distracting screen elements to provide a more comfortable view for reading your documents. In the Full Screen Reading view, you can display the Document Map or the Thumbnail pane to quickly jump to different parts of your document. You can also save, print, access tools, highlight text, and insert comments. If you have a Tablet PC, you can write comments and changes directly on the page using the tablet's stylus.

- 1 Full Screen Reading View button is available on the View tab too.

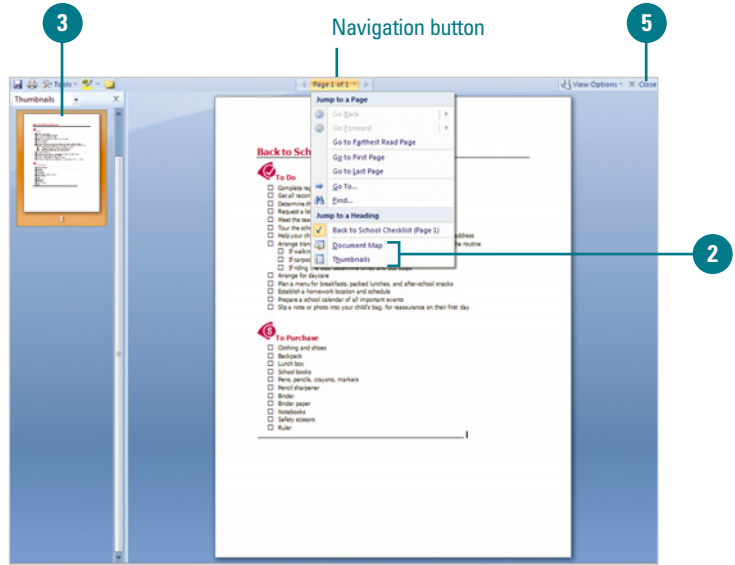


View Options button



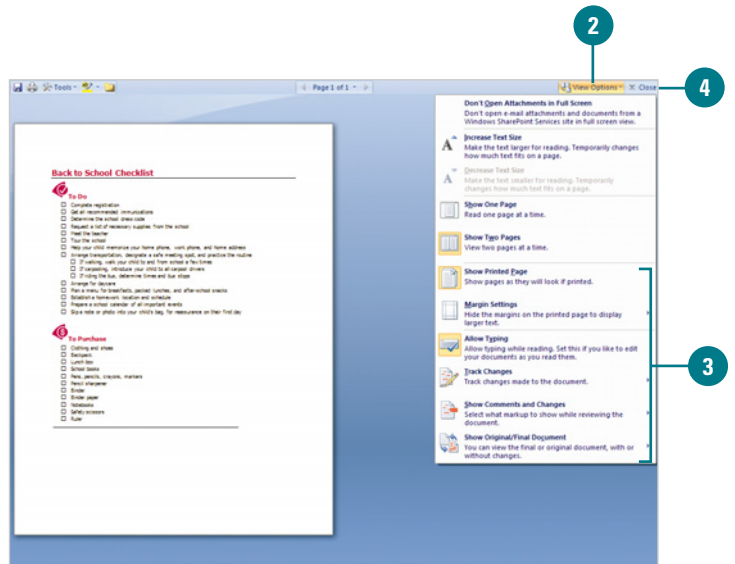
## Display Thumbnail or Document View

- 1 Click the **Full Screen Reading View** button.
- 2 Click the **Navigation** button, and then click **Document Map** or **Thumbnails**.
- 3 Click a document link or thumbnail of a page to display the page.
- 4 To turn the view off, click the **Navigation** button, and then click **Document Map** or **Thumbnails** again.
- 5 When you're done, click the **Close** button.



## Change Full Screen Reading View Options

- 1 Click the **Full Screen Reading View** button.
- 2 Click the **View Options** button.
- 3 Click the view you want to display:
  - ◆ **Don't Open Attachments in Full Screen.**
  - ◆ **Show Printed Page.**
  - ◆ **Margin Settings.**
  - ◆ **Allow Typing.**
  - ◆ **Track Changes.**
  - ◆ **Show Comments and Changes.**
  - ◆ **Show Original/Final Document.**
- 4 When you're done, click the **Close** button.



# Getting Help While You Work

## Using the Help Viewer to Get Answers

- 1 Click the **Help** button on the Ribbon.

**TIMESAVER** Press *F1*.

- 2 Locate the Help topic you want.

- ◆ Click a Help category on the home page, and then click a topic (? icon).
- ◆ Click the **Table of Contents** button on the toolbar, click a help category (book icon) and then click a topic (? icon).

- 3 Read the topic, and then click any links to get Help information.

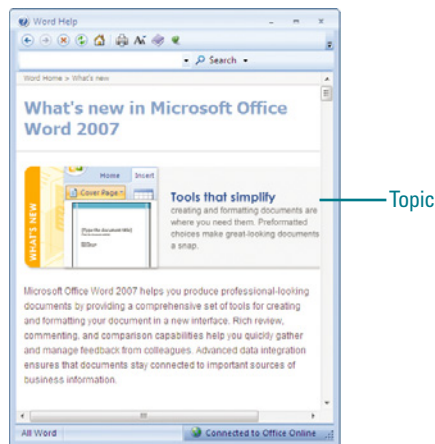
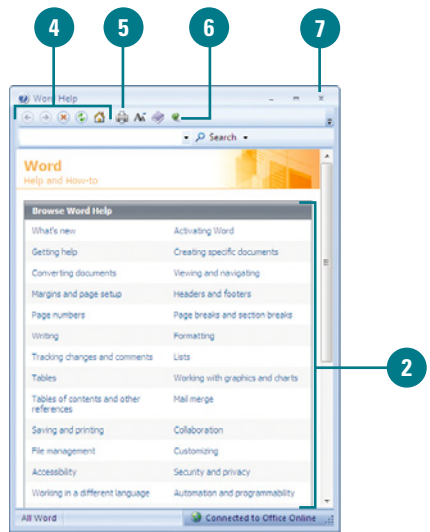
- 4 Click the **Back**, **Forward**, **Stop**, **Refresh**, and **Home** buttons on the toolbar to move around in the Help Viewer.

- 5 If you want to print the topic, click the **Print** button on the toolbar.

- 6 To keep the Help Viewer window (not maximized) on top or behind, click to toggle the **Keep On Top** button (pin pushed in) and **Not On Top** button (pin not pushed in) on the toolbar.

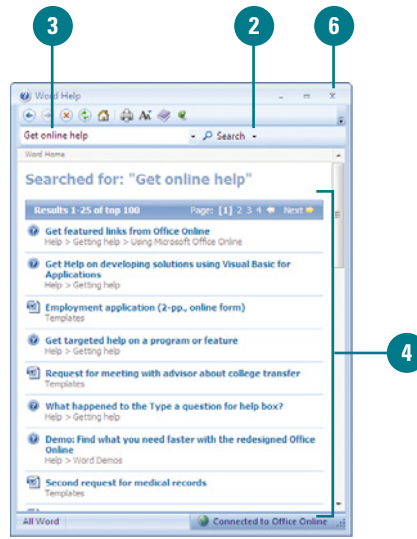
- 7 When you're done, click the **Close** button.

At some time, everyone has a question or two about the program they are using. The Office Help Viewer provides the answers and resources you need, including feature help, articles, tips, templates, training, and downloads. By connecting to Microsoft Office Online, you not only have access to standard product help information, but you also have access to updated information over the Web without leaving the Help Viewer. The Web browser-like Help Viewer allows you to browse an extensive catalog of topics using a table of contents to locate information, or ask a question or enter phrases to search for specific information. When you use any of these help options, a list of possible answers is shown to you with the most likely answer or most frequently-used at the top of the list.



## Search for Help

- 1 Click the **Help** button on the Ribbon.
- 2 Click the **Search button** list arrow below the toolbar, and then select the location and type of information you want.
- 3 Type one or more keywords in the Search For box, and then click the **Search** button or press Enter.
- 4 Click a topic.
- 5 Read the topic, and then click any links to get information on related topics or definitions.
- 6 When you're done, click the **Close** button.

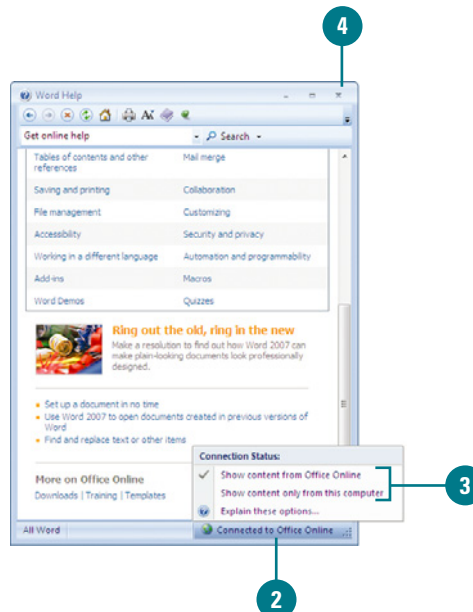


## Check Help Connection Status

- 1 Click the **Help** button on the Ribbon.
- 2 Click the Connection Status at the bottom of the Help Viewer.
- 3 Click the connection option where you want to get help information:
  - ◆ **Show content from Office Online** to get help from this computer and the internet (online).
  - ◆ **Show content only from this computer** to get help from this computer only (offline).

This setting is maintained for all Office 2007 program Help Viewers.

- 4 When you're done, click the **Close** button.



# Saving a Document

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WD07S-6.1.1

## Save a Document for Word 2007

- 1 Click the **Office** button, and then click **Save As**.

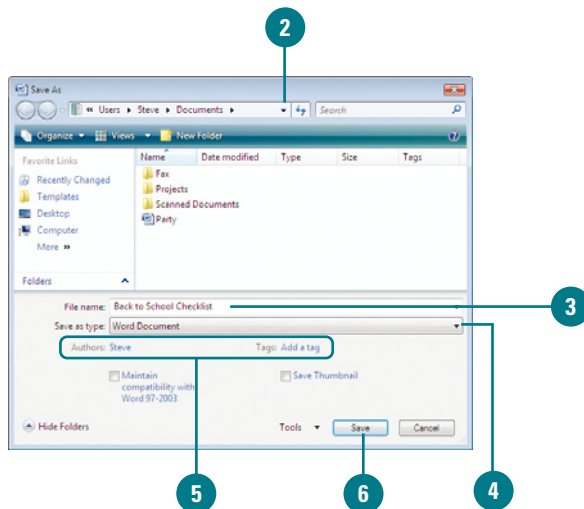
**TIMESAVER** Press *Ctrl+S*, or click the *Office* button, point to *Save As*, and then click the specific file format you want.

- 2 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 3 Type a document file name.
- 4 Click the **Save as type** list arrow, and then click **Word Document**.
- 5 Click the **Authors** or **Tags** box to enter Document Properties.
- 6 Click **Save**.

### Did You Know?

**You can access options from the Save dialog box.** In the Save dialog box, click *Tools*, and then click the command option you want, either *General*, *Web*, or *Compress Pictures*.

When you create a Word document, save it as a file on your computer so you can work with it later. When you save a document for the first time or if you want to save a copy of a file, use the **Save As** command. When you want to save an open document, use the **Save** button on the Quick Access Toolbar. When you save a document, Word 2007 saves 97-2003 files in an older format using compatibility mode (**New!**) and new 2007 files in an XML (Extensible Markup Language) based file format (**New!**). The XML format significantly reduces file sizes, provides enhanced file recovery, and allows for increased compatibility, sharing, reuse, and transportability. A Word 97-2003 document stays in compatibility mode—indicated on the title bar—until you convert it to the new 2007 file format. Compatibility mode disables new features that cannot be displayed or converted well by previous versions.



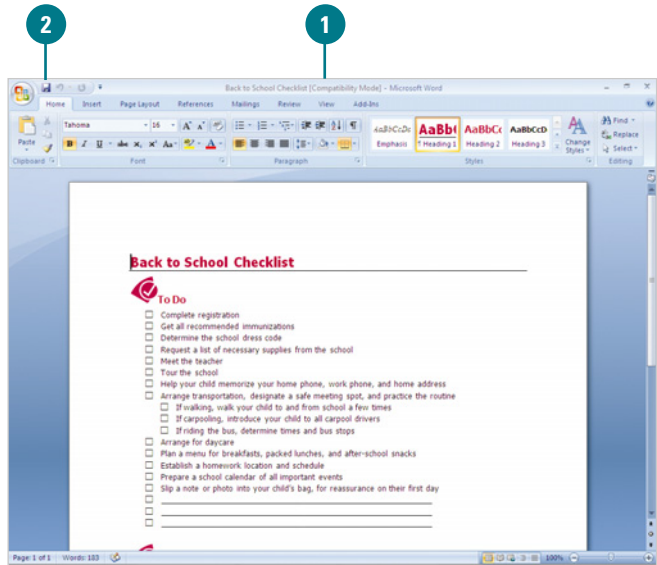
## Save an Word 97-2003 Document

- 1 Open the Word 97-2003 document you want to continue to save in the 97-2003 format.

The Word 97-2003 document opens in compatibility mode.

- 2 Click the **Save** button on the Quick Access Toolbar, or click the **Office** button, and then click **Save**.

Word stays in compatibility mode.



## Set Save Options

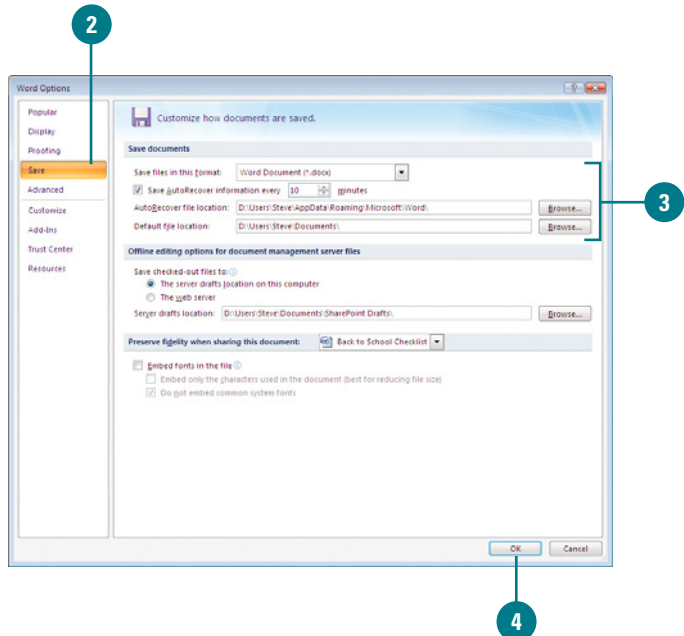
- 1 Click the **Office** button, and then click **Word Options**.

- 2 In the left pane, click **Save**.

- 3 Set the save options you want:

- ◆ **Default Save Format.** Click Save files in this format list arrow, and then click the default format you want.
- ◆ **Default File Location.** Specify the complete path to the folder location where you want to save your document.

- 4 Click **OK**.



# Saving a Document with Different Formats

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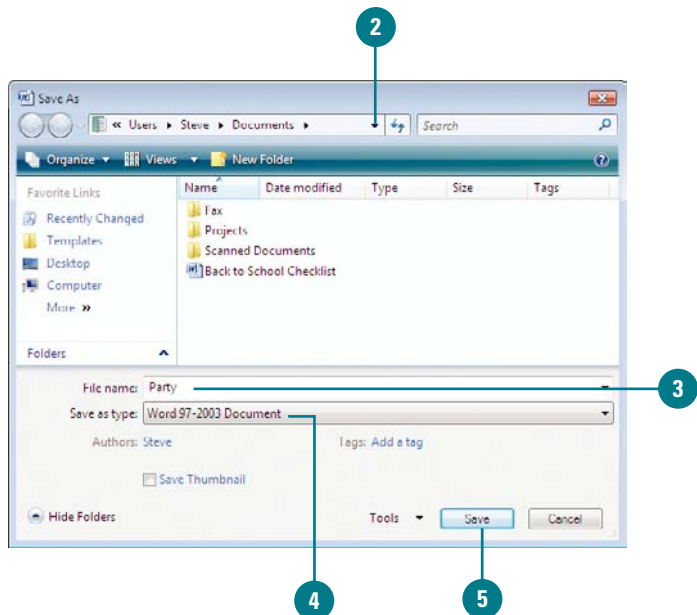
## Save a Document with Another Format

- 1 Click the **Office** button, point to **Save As**, and then click **Other Formats**.
- 2 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 3 Type a file name.
- 4 If necessary, click the **Save as type** list arrow, and then click the file format you want.
- 5 Click **Save**.

### See Also

See "Creating a PDF Document" on page 365 or "Creating an XPS Document" on page 366 for information on using and saving a file with different formats.

Word 2007 is a versatile suite of programs that allow you to save your documents in a variety of different formats—see the table on the following page for a complete list and description. For example, you might want to save your document as a Web page that you can view in a Web browser. Or you can save a document in an earlier 97-2003 version in case the people you work with have not upgraded to Office 2007. If you save a document to 97-2003, some new features and formatting are converted to uneditable pictures or not retained. The new format is compatible with Office 2003, Office XP, and Office 2000 with a software patch. However, for best results, if you're creating a document for someone with Word 97 to Word 2003, it's better to save it with the .doc file format.



## Word 2007 Save File Formats

Save As file type	Extension	Used to save
Word Document ( <b>New!</b> )	.docx	Word 2007 document
Word Macro-Enabled Document ( <b>New!</b> )	.docm	Word 2007 document that contains Visual Basic for Applications (VBA) code
Word 97-2003 Document	.doc	Word 97 to Word 2003 document
Word Template ( <b>New!</b> )	.dotx	Word 2007 Template
Word Macro-Enabled Template ( <b>New!</b> )	.dotm	Word 2007 template that includes preapproved macros
Word 97-2003 Templates	.dot	Word 97-2003 template
PDF ( <b>New!</b> )	.pdf	Fixed-layout electronic file format that preserves document formatting developed by Adobe
XPS Document Format ( <b>New!</b> )	.xps	Fixed-layout electronic file format that preserves document formatting developed by Microsoft
Single File Web Page	.mht; .mhtml	Web page as a single file with an .htm file
Web Page	.htm; .html	Web page as a folder with an .htm file
Web Page, Filtered	.htm; .html	Web page as a folder with an .htm file with a reduced file size
Rich Text Format	.rtf	Text files with formatting
Plain Text	.txt	Plain text files; no formatting
Word XML Document	.xml	XML document
Word 2003 XML Document	.xml	Word 2003 XML document
Word 97-2003 & 6.0/95 - RTF	.doc	Word 97-2003 & 6.0/95 Rich Text Format documents
Works 6.0 - 9.0	.wps	Works 6.0-9.0 files

# Checking Compatibility

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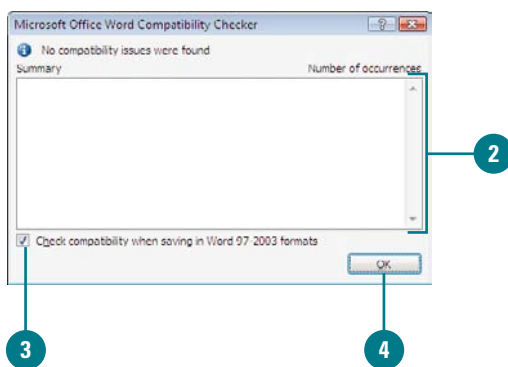
## Check Compatibility

- 1 Click the **Office** button, point to **Prepare**, and then click **Run Compatibility Checker**.

Word checks compatibility of the document for non supported features in earlier versions of the Word program.

- 2 View the compatibility summary information, so you can make changes, as necessary.
- 3 To have the compatibility checker review the document when the program saves the file, select the **Check compatibility when saving in Word 97-2003 formats** check box.
- 4 Click **OK**.

The Compatibility Checker (**New!**) identifies the potential loss of functionality when you save a Word 2007 document in the Word 97-2003 document file format. The Compatibility Checker generates a report that provides a summary of the potential losses and the number of occurrences in the document. Use the report information to determine what caused each message and for suggestions on how to change it. If the loss is due to a new feature in Word 2007—such as custom layouts or Quick Styles applied to shapes, pictures, and WordArt—you might be able to simply remove the effect or feature. In other cases, you might not be able to do anything about it. To maintain a visual appearance, SmartArt graphics and other objects with new effects are converted to bitmaps to preserve their overall look and cannot be edited.



# Documenting Properties

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WD07S-1.3.3

## View and Edit Document Properties

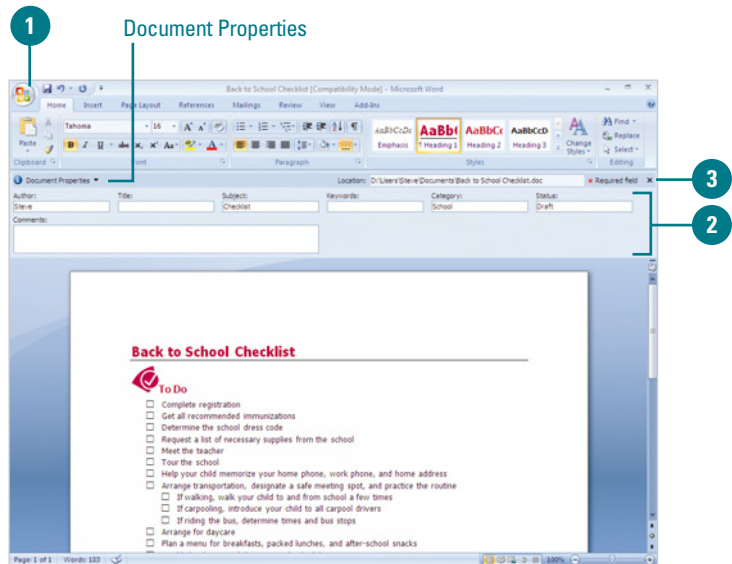
- 1 Click the **Office** button, point to **Prepare**, and then click **Properties**.
- 2 Enter the standard properties, such as author, title, subject, keywords, category, status, and comments, in the Document Information Panel.
- 3 Click the **Close** button on the Document Information Panel.

### Did You Know?

**You can customize advanced document properties.** In the Document Properties pane, click the arrow next to Document Properties, click Advanced Properties, click the tabs to view, add, and change property information, and then click OK.

**You can view or change document properties when you open or save a file.** In the Open or Save As dialog box, select the document you want, click the arrow next to the Views, and then click Details to view file size and last changed date, or click Properties to view all information. If you want to insert or change author names or keywords, click the Authors box or Tags box, and then type what you want.

Word automatically documents properties while you work—such as file size, save dates, and various statistics—and allows you to document other properties, such as title, author, subject, keywords, category, and status. You can view or edit standard document properties or create advanced custom properties by using the **Document Information Panel (New!)**, which is an XML-based Microsoft InfoPath 2007 form hosted in the Office 2007 program. You can use document properties—also known as **metadata**—to help you manage and track files; search tools can use the metadata to find a document based on your search criteria. If you associate a document property to an item in the document, the document property updates when you change the item.



# Zooming the View In and Out

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WD07S-5.1.2

## Change the View

1 Use any of the following zoom options available on the Status bar (**New!**):

- ◆ **Zoom Out.** Click to zoom out (percentage gets smaller).
- ◆ **Zoom In.** Click to zoom in (percentage gets larger).
- ◆ **Slider.** Drag to zoom out or in to the percentage you want.
- ◆ **Zoom Level.** Click to display the Zoom dialog box, where you can select the magnification you want.

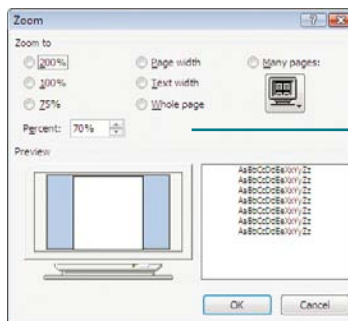
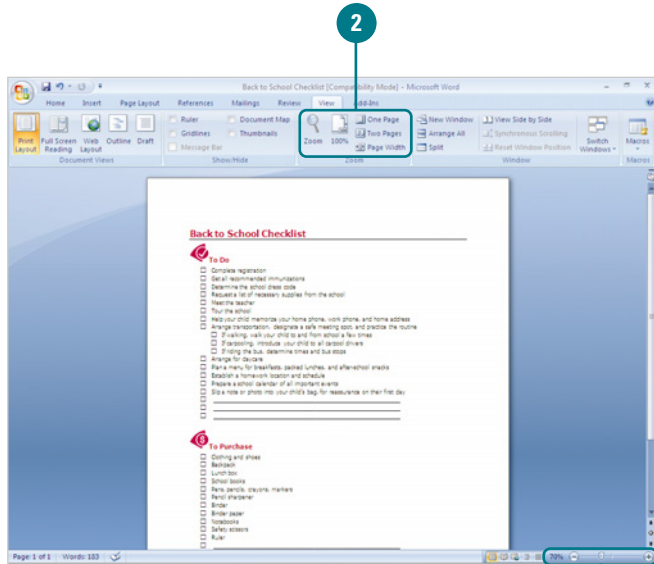
2 For additional zoom options, click the **View** tab, and then use any of the following options:

- ◆ **Zoom.** Click to display the Zoom dialog box, where you can select the magnification you want.

This is the same as Zoom Level above.

- ◆ **100%.** Click to display the view at 100%.
- ◆ **One Page.** Click to display one page at a time.
- ◆ **Two Pages.** Click to display two pages at a time.
- ◆ **Page Width.** Click to display the page to the current window width.

Working with the Zoom tools gives you one more way to control exactly what you see in a Word document. The Zoom tools are located in the bottom-right corner of the window. Large documents are difficult to work with and difficult to view. Many documents, when viewed at 100%, are larger than the maximized size of the window. When this happens, viewing the entire worksheet requires reducing the zoom.



# Getting Updates on the Web

## Get Word Updates on the Web

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Resources**.
- 3 Click **Check for Updates** to open the Microsoft Update Web site.
- 4 Click one of the update buttons to find out if you need updates, and then choose the updates you want to download and install.

### Did You Know?

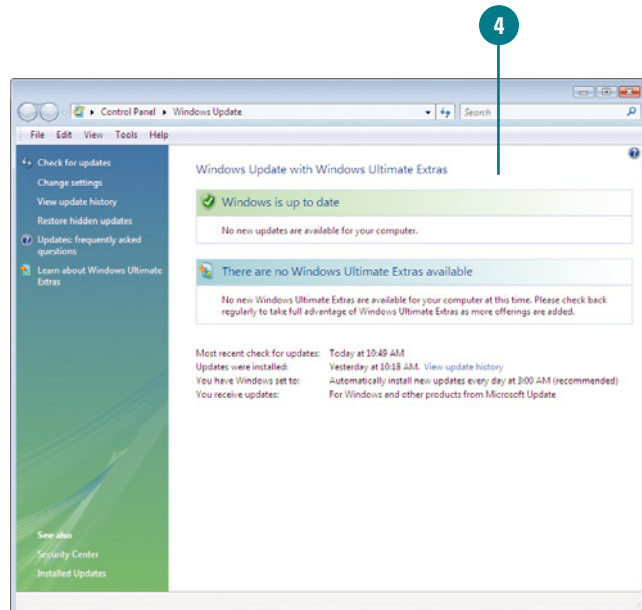
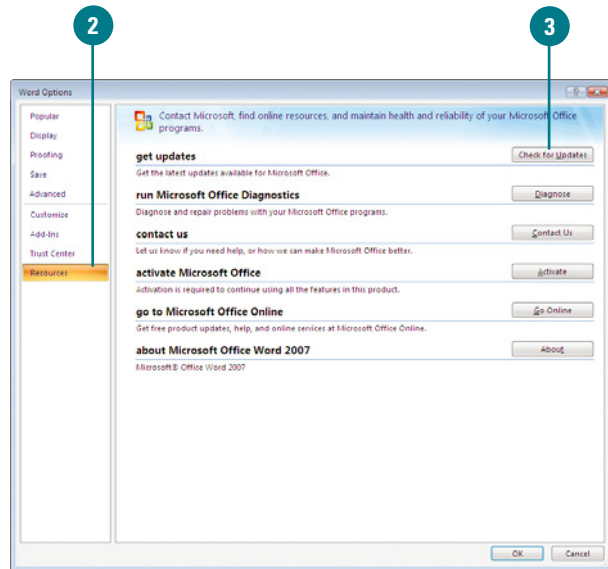
#### **You can contact Microsoft for help.**

You can get support over the phone, chat, or e-mail messages. To get online help, click the Office button, click Word Options, click Resources, and then click Contact Us. To get offline help, click the Office button, click Word Options, click Resources, click About, and then click Tech Support for contact information.

#### **You can get better help information.**

At the bottom of a help topic, click Yes, No, or I don't know to give Microsoft feedback on the usefulness of a topic.

Microsoft offers a quick and easy way to update Word with any new software downloads that improve the stability and security of the program. From the Resources area in the Options dialog box, simply click the Check for Updates button to connect to the Microsoft Update Web site to have your computer scanned for necessary updates, and then choose which Office updates you want to download and install.

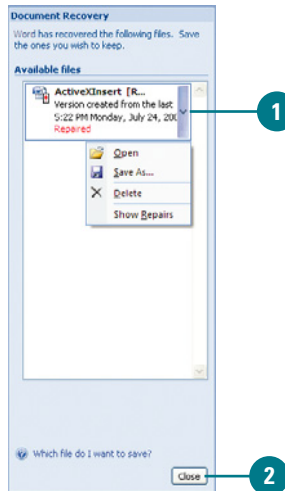


# Recovering a Document

## Recover a Document

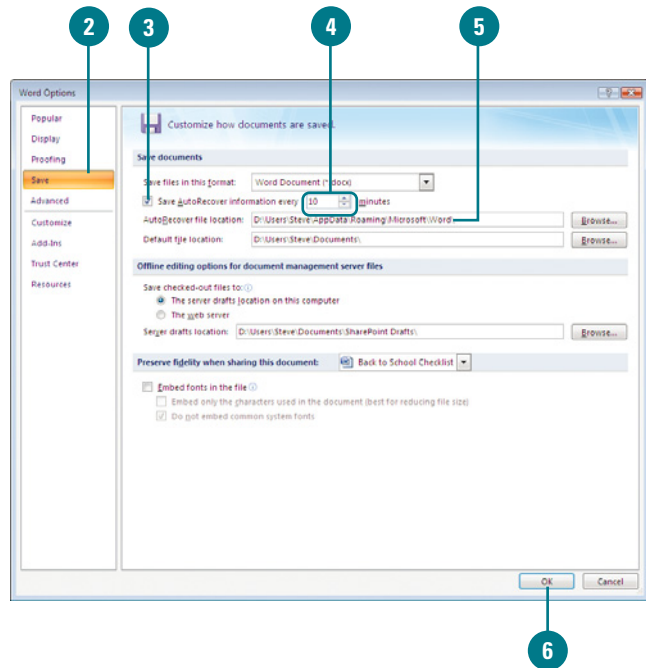
- 1 When the Document Recovery task pane appears, click the list arrow next to the name of each recovered file, and then perform one of the following:
  - ◆ Click **Open** to view the file for review.
  - ◆ Click **Save As** to save the file.
  - ◆ Click **Delete** to close the file without saving.
  - ◆ Click **Show Repairs** to find out how Word fixed the file.
- 2 When you're done, click the **Close** button.

If Word encounters a problem and stops responding, the program tries to recover the file the next time you open Word. The recovered files appear in the Document Recovery task pane, which allows you to open the files, view what repairs were made, and compare the recovered versions. Each file appears in the task pane with a status indicator, either **Original** or **Recovered**, which shows what type of data recovery was performed. You can save one or all of the file versions. You can also use the **AutoRecover** feature to periodically save a temporary copy of your current file, which ensures proper recovery of the file.



## Use AutoRecover

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Save**.
- 3 Select the **Save AutoRecover information every x minutes** check box.
- 4 Enter the number of minutes, or click the **Up** and **Down** arrows to adjust the minutes.
- 5 Specify the complete path to the folder location where you want to save your AutoRecover file.
- 6 Click **OK**.



# Diagnosing and Repairing Problems

## Diagnose and Repair Problems

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Resources**.
- 3 Click **Diagnose**.

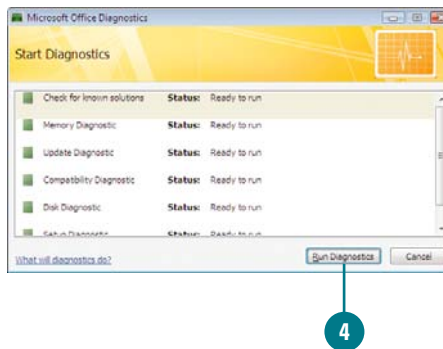
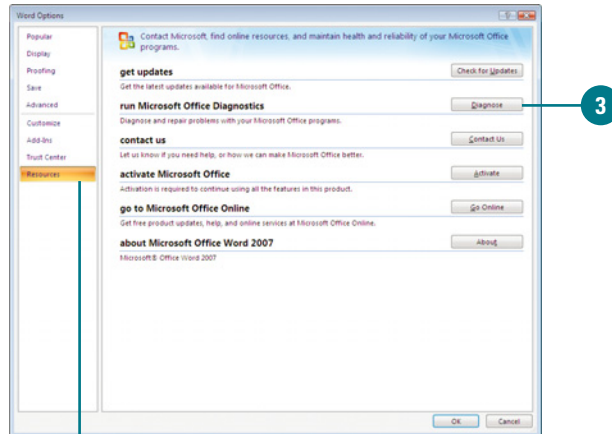
**TIMESAVER** In Windows, click *Start*, point to *All Programs*, click *Microsoft Office*, click *Microsoft Office Tools*, and then click *Microsoft Office Diagnostics*.

- 4 Click **Continue**, and then click **Run Diagnostics**.

Office runs diagnostics to determine and fix any problems. A report appears in your browser:

- ◆ **Setup.** Checks for corrupt files and registry settings.
- ◆ **Disk.** Checks error logs.
- ◆ **Memory.** Checks integrity of computer RAM.
- ◆ **Update.** Checks for Office updates on the Web.
- ◆ **Compatibility.** Checks for conflicts with Word.
- ◆ **Check for known solutions.** Checks data on program crashes on your computer.

At times you may determine that Word is not working as efficiently as it once did. This sometimes happens when you install new software or move files into new folders. Use the Diagnose command (**New!**) to improve performance by repairing problems, such as missing files from setup, corrupted files by malicious viruses, and registry settings. Note that this feature does not repair personal files such as your documents. If the Diagnose command does not fix the problem, you might have to reinstall Word. If you need to add or remove features, reinstall Word, or remove it entirely, you can use Office Setup's maintenance feature.

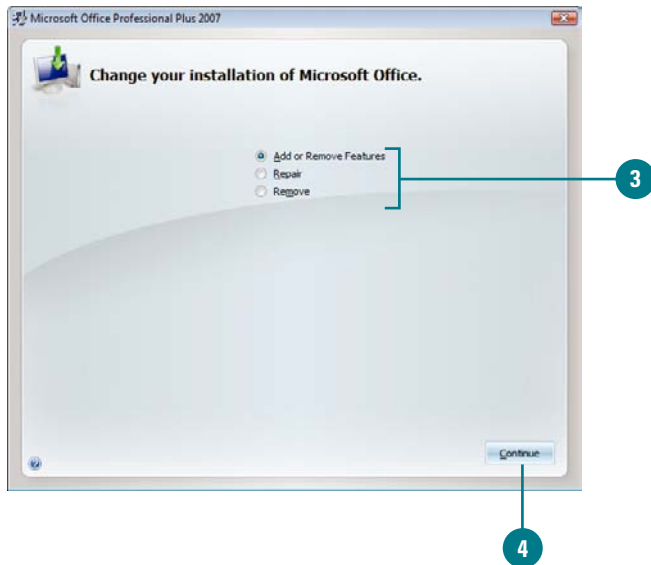


## Perform Maintenance on Office Programs

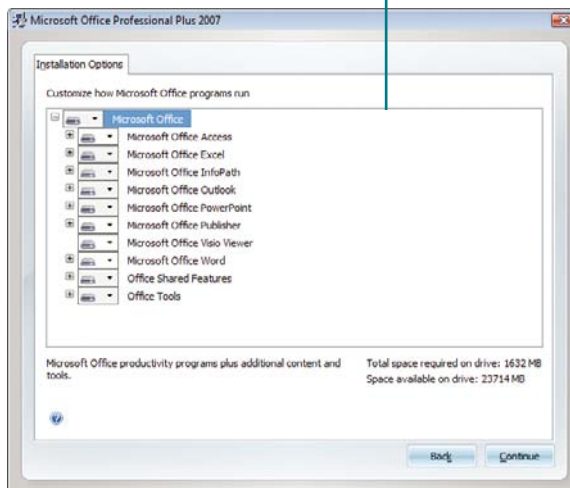
- 1 Insert the Word or Office installation disc in your drive.
- 2 In Windows Explorer, double-click the Setup icon on the Word or Office installation disc.
- 3 Click one of the following maintenance buttons.
  - ◆ **Add or Remove Features** to change which features are installed or remove specific features.
  - ◆ **Repair** to reinstall or repair Microsoft Office 2007 to its original state.
  - ◆ **Remove** to uninstall Microsoft Office 2007 from this computer.
- 4 Click **Continue**, and then follow the wizard instructions to complete the maintenance.

### See Also

See "Working with Office Safe Modes" on page 328 for information on fixing problems with a Microsoft Office 2007 program.



### Add or Remove Features



# Closing a Document and Exiting Word

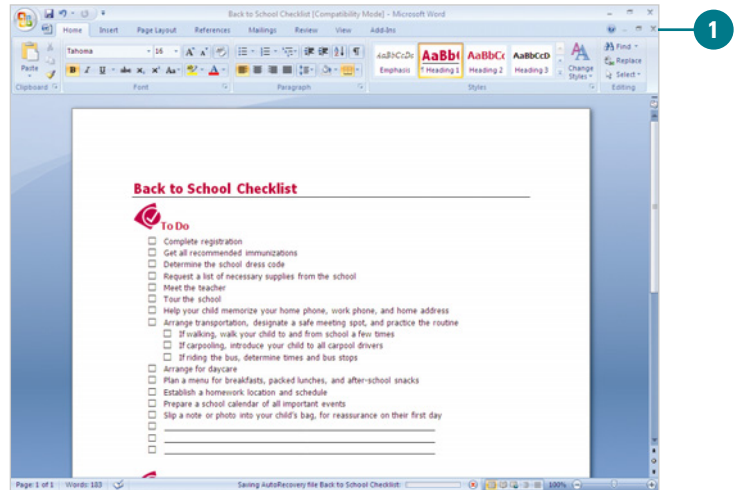
## Close a Document

- 1 Click the **Office** button, and then click **Close**, or click the **Close** button on the Document window (available when documents not all shown on taskbar).

**TIMESAVER** Press **Ctrl+W** or double-click the **Office** button.

- 2 If you have made changes to any open files since last saving them, a dialog box opens, asking if you want to save changes. Click **Yes** to save any changes, or click **No** to ignore your changes.

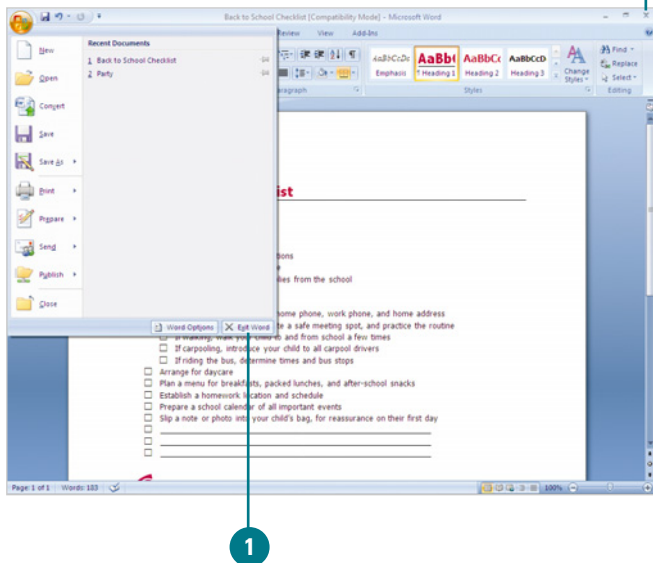
After you finish working on a document, you can close it. Closing a document makes more computer memory available for other activities. Closing a document is different from exiting, or quitting, a program; after you close a document, the program is still running. When you're finished using the program, you should exit it. To protect your files, always save your documents and exit before turning off the computer.



## Exit Word

- 1 Click the **Close** button on the Program window, or click the **Office** button, and then click **Exit Word**.
- 2 If you have made changes to any open files since last saving them, a dialog box opens asking if you want to save changes. Click **Yes** to save any changes, or click **No** to ignore your changes.

Program window Close button



# Working with Simple Documents

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# 2

## Introduction

Whether you're typing a carefully worded letter, creating a professional resume, or producing a can't-miss promotional newsletter for your business or neighborhood group, Microsoft Office Word 2007 is the program for you. Word contains all the tools and features you need to produce interesting documents that say exactly what you mean and that have the look to match.

Microsoft Word is designed especially for working with text, so it's a snap to create and edit letters, reports, mailing lists, tables, or any other word-based communication. What makes Word perfect for your documents is its editing capabilities combined with its variety of views. For example, you can jot down your ideas in Outline view. Then switch to Normal view to expand your thoughts into complete sentences and revise them without retyping the entire page. When you're done revising the document, switch to Reading view to read and proof your work. Finally, in Print Layout view you can quickly add formatting elements, such as bold type and special fonts, to make your documents look professional.

In addition, Office offers a Find and Replace feature that allows you to look for text and make changes as necessary. The Smart Tags feature works with other Microsoft Office programs to enhance your documents. Contact information can be pulled from your address book in Outlook, to your Word document.

If you accidentally make a change, you can use the Undo feature to remove, or "undo," your last change. Word remembers your recent changes, and gives you the opportunity to undo them. If you decide to Redo the Undo, you can erase the previous change.

## What You'll Do

**Create a Blank Document**

**Create a New Document From an Existing One**

**Create a Document Using a Template**

**Create a Letter or Memo**

**Set Up the Page**

**Move and Resize Document Windows**

**Work with Multiple Documents**

**Move Around in a Document**

**Select Text**

**Edit Text**

**Copy and Move Text**

**Find and Replace Text**

**Insert Hyphens**

**Insert Information the Smart Way**

**Correct Text Automatically**

**Undo and Redo an Action**

# Creating a Blank Document

## Create a Blank Document

- 1 Click the **Office** button, and then click **New**.

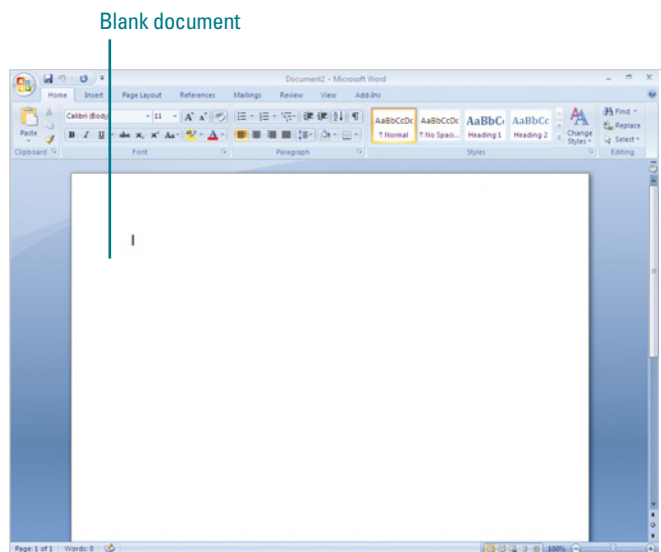
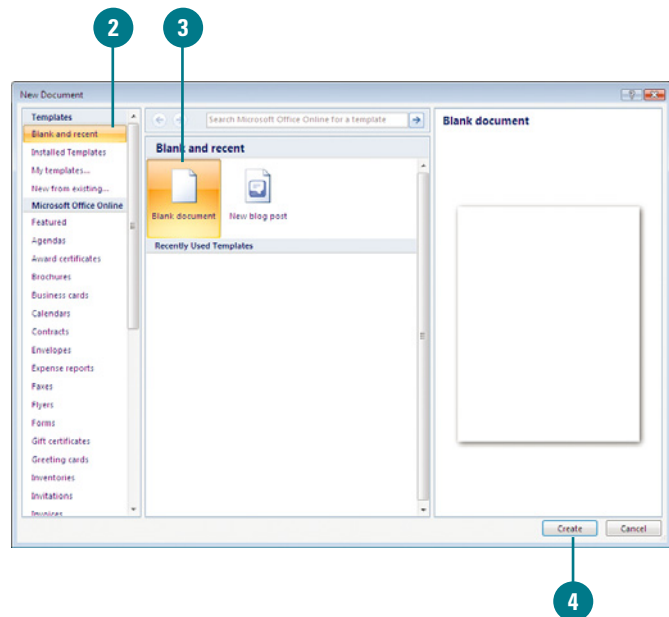
**TIMESAVER** To create a blank document without a dialog box, press **Ctrl+N**.

The New dialog box appears.

- 2 In the left pane, click **Blank and recent**.
- 3 Click **Blank Document**.
- 4 Click **Create**.

A new blank document appears in the Word window.

When you start Word, the program window opens with a new document so that you can begin working in it. You can also start a new document whenever Word is running, and you can start as many new documents as you want. Each new document displays a default name—such as “Document1,” “Document2” and so on—numbered according to how many new documents you have started during the work session until you save it with a more meaningful name. The document name appears on the title bar and taskbar buttons.



# Creating a New Document From an Existing One

## Create a New Document From an Existing Document

- 1 Click the **Office** button, and then click **New**.

The New dialog box appears.

- 2 In the left pane, click **New from existing**.

- 3 Click the **Files of type** list arrow, and then select the type of file that you want to open.

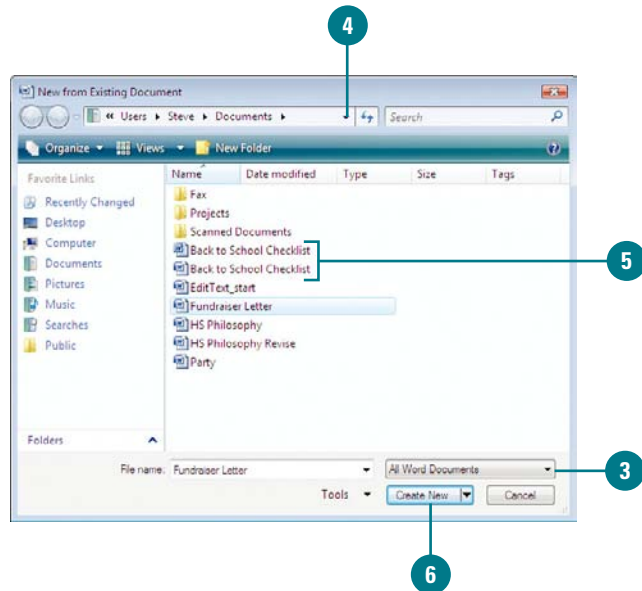
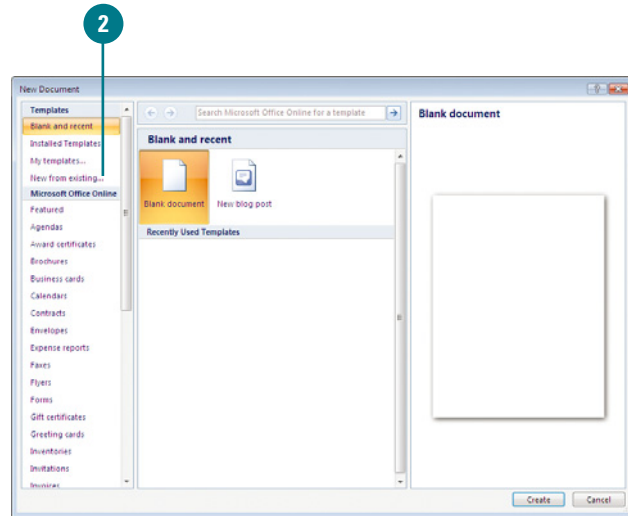
- 4 Click the **Look in** list arrow, and then navigate to the file.

- 5 Select the document file you want to open.

- 6 Click **Create New**.

A new document appears in the Word window.

Instead of creating a document from scratch, you can also create a document from an existing document you already have. If you have a document that is close to what you want to create, you can use the New from existing option to create an untitled document with the contents of an existing document. You can use the New from existing option from the New dialog box, which opens the Open dialog box where you can select the existing document you want to use.



# Creating a Document Using a Template

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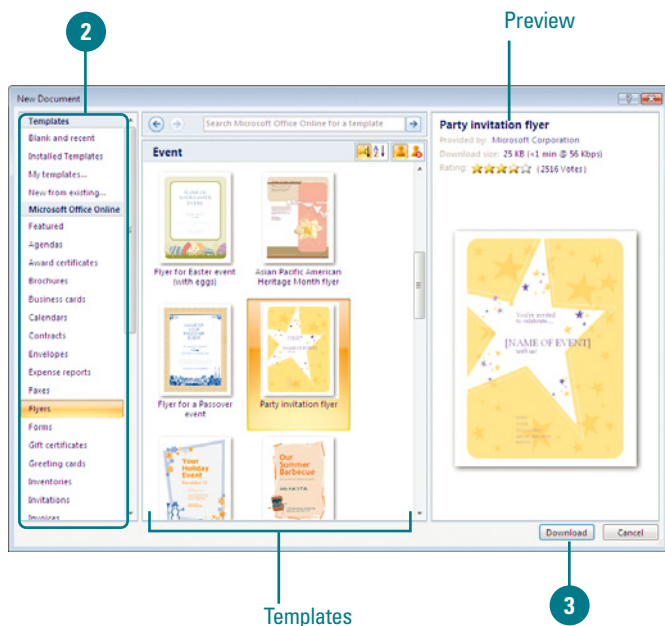
## Create a Document with a Template

- 1 Click the **Office** button, and then click **New**.
- 2 Choose one of the following:
  - ◆ Click the **Blank and recent** category to open recently used templates.
  - ◆ Click the **Installed Templates** category, and then click a template.
  - ◆ Click the **My Templates** category to open a dialog box.
  - ◆ Click the **Featured** category, and then click a template from the Spotlight section.
  - ◆ Click a Microsoft Office Online template category, and then click a template.
- 3 Click **Create** or **Download**.
- 4 If necessary, click the template you want, and then click **OK**.

### Did You Know?

*You can download template packs on the Web. Go to [www.microsoft.com](http://www.microsoft.com), click the Office link, and then search for Office Templates.*

Word provides a collection of professionally designed templates that you can use to create documents. Start with a template when you have a good idea of your content, but want to take advantage of a template's professional look. A **template** is a document file that provides you with a unified document design, which includes themes, so you only need to add text and graphics. In the New dialog box, you can choose a template from those already installed with Office Word or from the Microsoft Office Online Web site, an online content library. You can choose a Microsoft Office Online template from one of the listed categories or from the Spotlight (**New!**) section in the Featured category. The Spotlight section highlights new Office content, which you can set to automatically update.



# Creating a Letter or Memo

## Create a Letter or Memo

- 1 Click the **Office** button, and then click **New**.

The New dialog box appears.

- 2 In the left pane, click **Letters** or **Memos**.

- 3 If necessary, click a category.

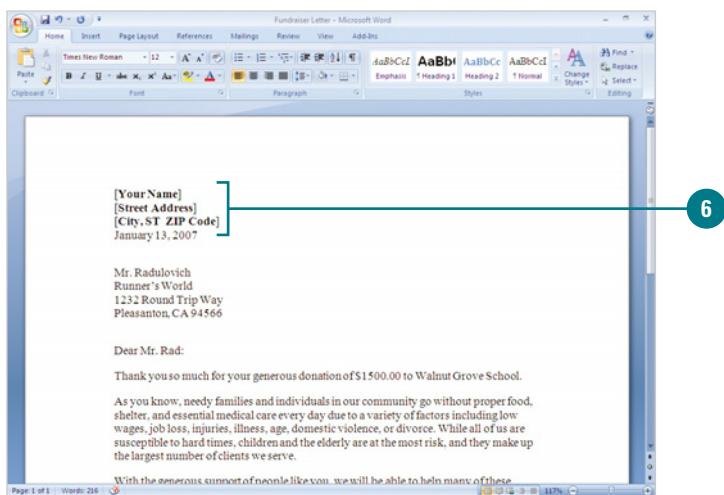
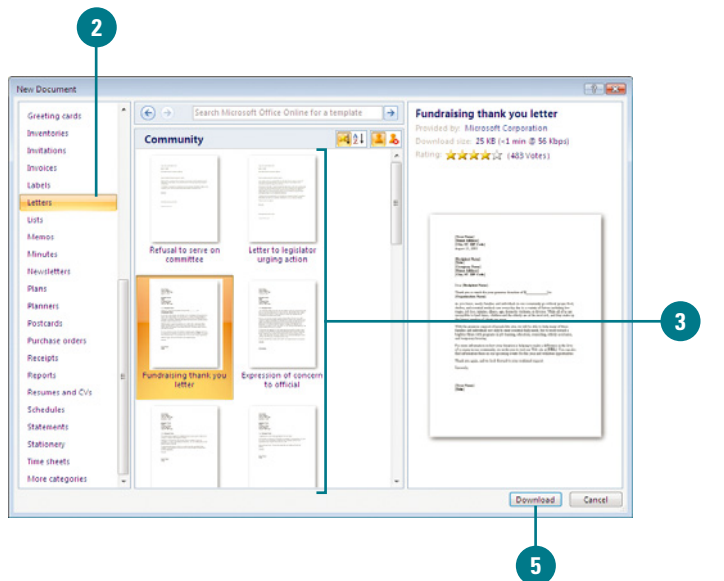
- 4 Click the template you want to use.

- 5 Click **Download**.

A new document appears in the Word window.

- 6 Edit the text in this place holders to make it your own document.

You can create a letter in Word as quickly as you can grab a pen and paper and start writing. With all of the text, formatting, spelling, and graphic features that Word has to offer, writing a letter is a very easy way to communicate with clients, friends, and family. Memos are another commonly used document whose creation has been simplified via the use of Word templates. You can use the Memo Wizard to create and customize a memo form all your own. Add your company logo, change font attributes, adjust line spacing, and other important parts of your document and you have a customized memo.



# Setting Up the Page

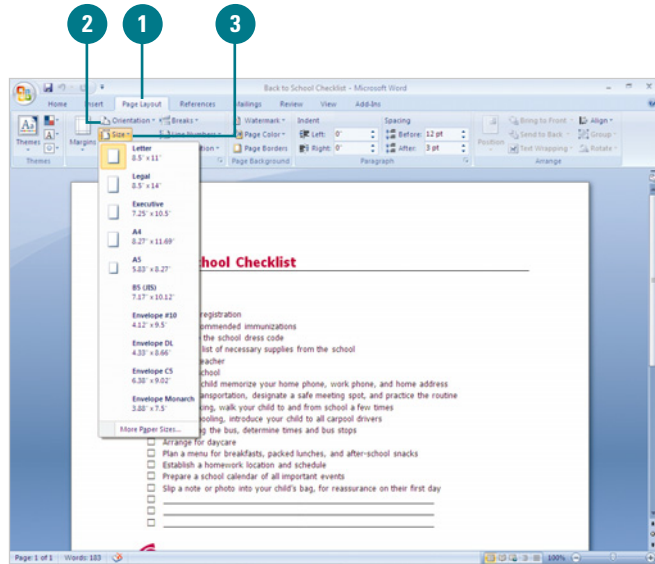
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## Set the Page Orientation and Size Quickly

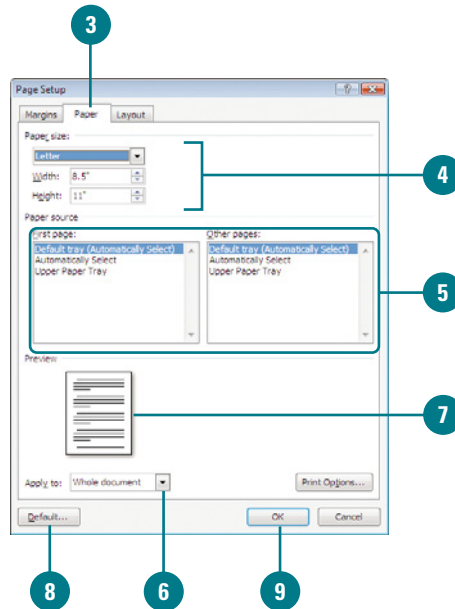
- 1 Click the **Page Layout** tab.
- 2 To quickly change the page orientation, click the **Orientation** button, and then click **Landscape** or **Portrait**.
- 3 To quickly change the page size, click the **Size** button, and then click the size you want.

Every document you produce and print might need a different page setup. You can achieve the look you want by printing on a standard paper size (such as letter, legal, or envelope), international standard paper sizes, or any custom size that your printer accepts. The default setting is 8.5 x 11 inches, the most common letter and copy size. You can also print several pages on one sheet. You can also select the page orientation (portrait or landscape) that best fits the entire document or any section. **Portrait** orients the page vertically (taller than it is wide) and **landscape** orients the page horizontally (wider than it is tall).



## Set Custom Page Size Options

- 1 Click the **Page Layout** tab.
- 2 Click the **Page Size Dialog Box Launcher**, or click the **Size** button, and then click **More Paper Sizes**.
- 3 Click the **Paper** tab.
- 4 Click the **Paper Size** list arrow, and then select the paper size you want, or specify a custom size.
- 5 Select the paper source for the first page and other pages.
- 6 Click the **Apply To** list arrow, and then click **This Section, This Point Forward**, or **Whole Document**.
- 7 Verify your selections in the Preview box.
- 8 To make your changes the default settings for all new documents, click **Default**, and then click **Yes**.
- 9 Click **OK**.



# Moving and Resizing Document Windows

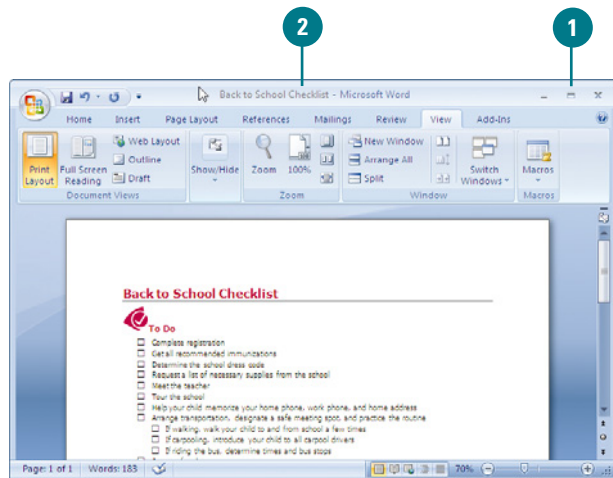
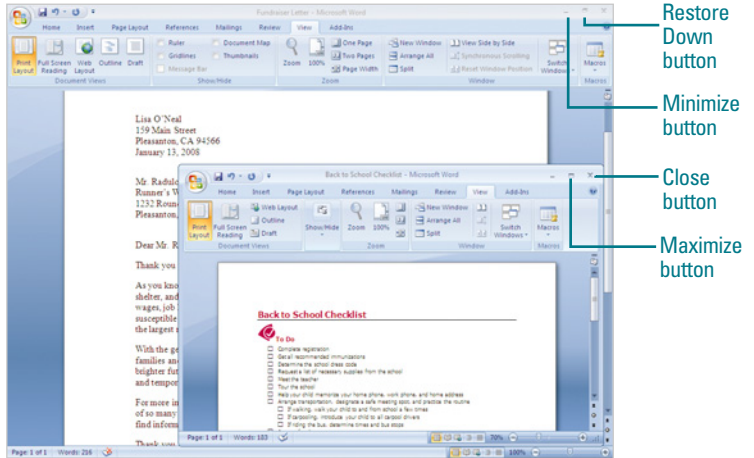
## Resize and Move a Window

- ◆ **Maximize button.** Click to make a window fill the entire screen.
- ◆ **Restore Down button.** Click to reduce a maximized window to a reduced size.
- ◆ **Minimize button.** Click to shrink a window to a taskbar button. To restore the window to its previous size, click the taskbar button.
- ◆ **Close button.** Click to shut a window.

## Resize and Move a Window Using a Mouse

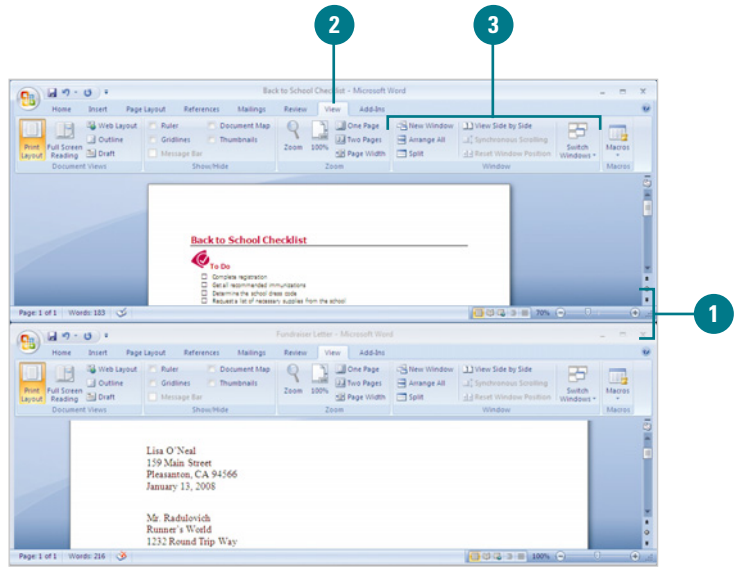
- 1 If the window is maximized, click the **Restore Down** button.
- 2 Use the following methods:
  - ◆ **Move.** Move the mouse over the title bar.
  - ◆ **Resize.** Move the mouse over one of the borders of the window until the mouse pointer changes into a two-headed arrow. The directions of the arrowheads show you the directions in which you can resize the window.
- 3 Drag to move or resize the window.

Every Office program and document opens inside a **window**, which contains a title bar, the Ribbon, and work area. This is where you create and edit your data. Most often, you'll probably fill the entire screen with one window. But when you want to move or copy information between programs or documents, it's easier to display several windows at once. You can arrange two or more windows from one program or from different programs on the screen at the same time. However, you must make the window active to work in it. You can also click the document buttons on the taskbar to switch between open documents.



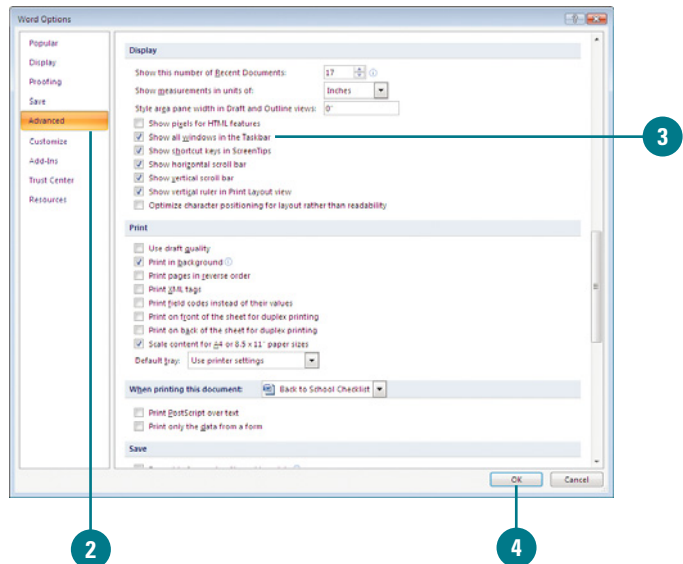
## Arrange or Switch Between Windows

- 1 Open the documents you want to arrange or switch between.
- 2 Click the **View** tab.
- 3 In the Window group, perform any of the following:
  - ◆ Click **Switch Windows**, and then click the document name you want.
  - ◆ Click **Arrange All**, click an arrange window option (Tiled, Horizontal, Vertical, or Cascade), and then click OK.
  - ◆ Click **New Window** to open a new window containing a view of the current document.



## Change the Window Display

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Select or clear the **Show all windows in the Taskbar** check box.
  - ◆ Select the check box to display all document windows in the Taskbar. This means each document uses a separate Word program window.
  - ◆ Clear the check box to display all documents in one Word program window. This means each document uses a separate Document window. You'll see two sets of close and resize buttons, one for the Program window and one for the active Document window.
- 4 Click **OK**.



# Working with Multiple Documents

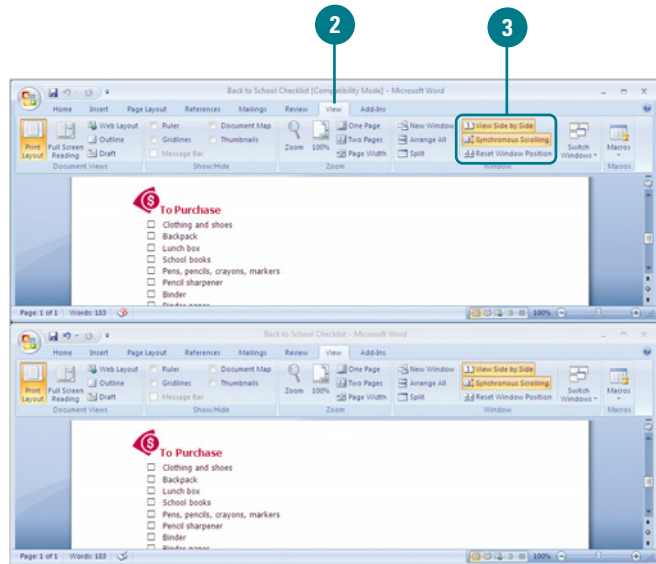
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## Compare Windows Side By Side

- 1 Open the documents you want to compare side by side.
- 2 Click the **View** tab.
- 3 In the Window group, perform any of the following:
  - ◆ Click **View Side By Side** to compare two documents vertically.
  - ◆ Click **Synchronous Scrolling** to synchronize the scrolling of two documents so that they scroll together. To enable this feature turn on View Side By Side.
  - ◆ Click **Reset Window** to reset the window position of the documents being compared side-by-side so that they share the screen equally. To enable this feature turn on View Side By Side.
- 4 When you're done, click the **View Side By Side** button to return to the full screen.

If you're working on two similar documents and want to do a quick compare to see if they are the same, you can use the View Side By Side command on the View tab. When you view two documents side by side, you can enable synchronous scrolling to scroll both documents together at the same time. When you're done, you can reset the window position of the documents being compared side by side so they share the screen equally. If you want to work on two different parts of a document, you can use the Split button to create two separate scrolling sections for the same document.

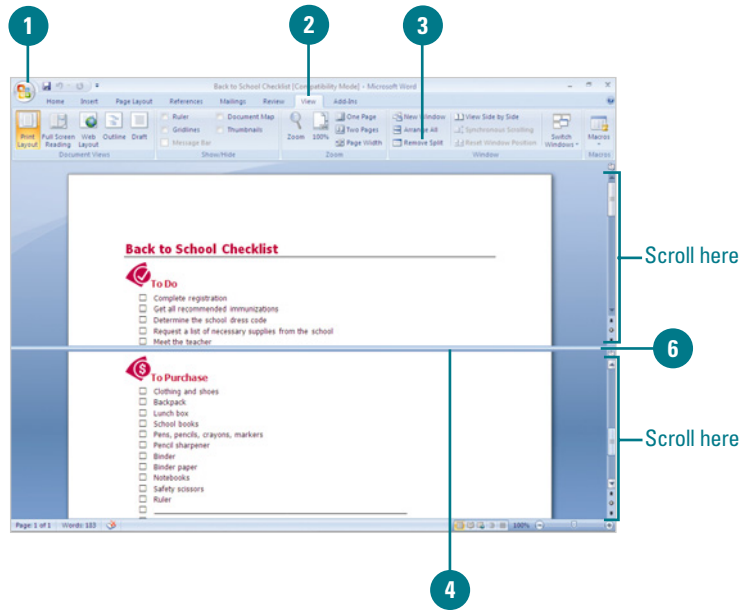


## Split Windows

- 1 Open the documents you want to split.
- 2 Click the **View** tab.
- 3 Click the **Split** button.
- 4 Click to split the document where you want.
- 5 Scroll each part of the window separately.
- 6 To remove the split, double-click the divider line.

### Did You Know?

*You can resize a split window.* Drag the divider line to the new location you want.



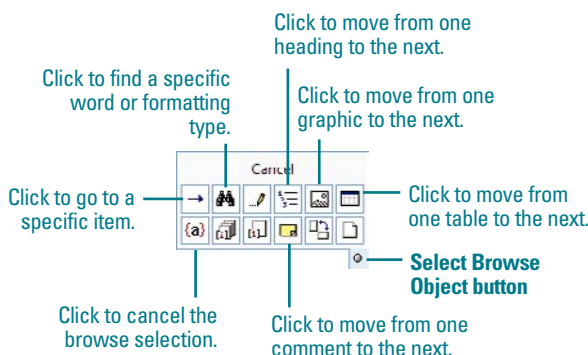
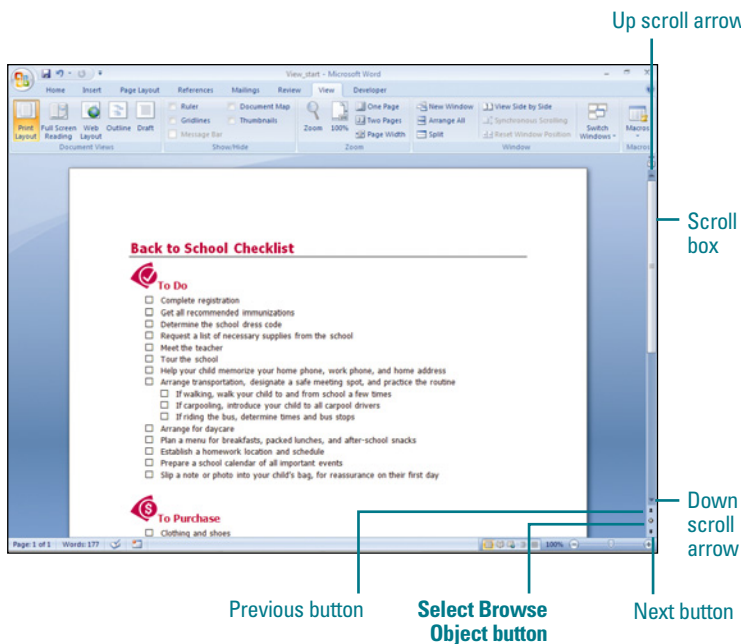
# Moving Around in a Document



As your document gets longer, some of your work shifts out of sight. You can easily move any part of a document back into view. **Scrolling** moves the document line by line. **Paging** moves the document page by page. **Browsing** moves you through your document by the item you specify, such as to the next word, comment, picture, table, or heading. The tools described here move you around a document no matter which document view you are in.

## Scroll, Page, and Browse Through a Document

- ◆ To scroll through a document one line at a time, click the up or down scroll arrow on the vertical scroll bar.
- ◆ To quickly scroll through a document, click and hold the up or down scroll arrow on the vertical scroll bar.
- ◆ To scroll to a specific page or heading in a document, drag the scroll box on the vertical scroll bar until the page number or heading you want appears in the yellow box.
- ◆ To page through the document one screen at a time, press Page Up or Page Down on the keyboard.
- ◆ To browse a document by page, edits, headings, or other items, click the Select Browse Object button, and then click that item. If a dialog box opens, enter the name or number of the item you want to find, and then click the Previous or Next button to move from one item to the next.



# Selecting Text

## Select Text

- 1 Position the pointer in the word, paragraph, line, or part of the document you want to select.
- 2 Choose the method that accomplishes the selection you want to complete in the easiest way.

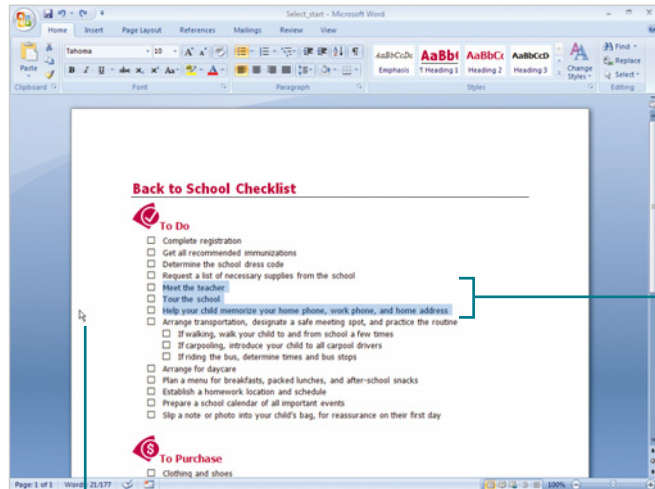
Refer to the table for methods to select text.

### Did You Know?

#### **AutoComplete finishes your words.**

As you enter common text, such as your name, months, today's date, and common salutations and closings, Word provides the rest of the text in a ScreenTip. Press Enter to have Word complete your words.

The first step in working with text is to highlight, or **select**, the text you want. Once you've selected it, you can copy, move, format, and delete words, sentences, and paragraphs. When you finish with or decide not to use a selection, you can click anywhere in the document to **deselect** the text.



1

2

## Selecting Text

### To select

### Do this

A single word

Double-click the word.

A single paragraph

Triple-click a word within the paragraph.

A single line

Click in the left margin next to the line.

Any part of a document

Click at the beginning of the text you want to highlight, and then drag to the end of the section you want to highlight.

A large selection

Click at the beginning of the text you want to highlight, and then press and hold Shift while you click at the end of the text that you want to highlight.

The entire document

Triple-click in the left margin.

An outline heading or subheading in Outline view

Click the bullet, plus sign, or minus sign.

# Editing Text



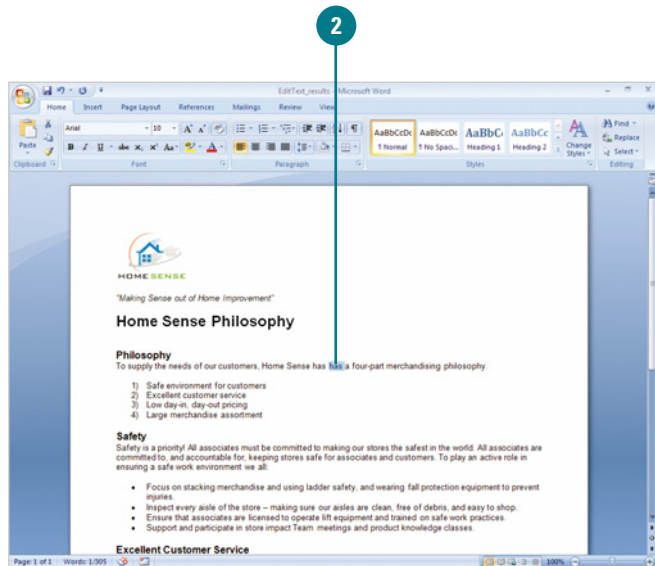
Before you can edit text, you need to highlight, or select, the text you want to modify. Then you can delete, replace, move (cut), or copy text within one document or between documents even if they're from different programs. In either case, the steps are the same. Text you cut or copy is temporarily stored in the Office Clipboard. When you paste the text, the Paste Options button appears below it. When you click the button, a menu appears with options to specify how Office pastes the information in the document. To copy or move data without using the Clipboard, you can use a technique called **drag-and-drop**. Drag-and-drop makes it easy to copy or move text short distances.

## Select and Edit Text

- 1 Move the I-beam pointer to the left or right of the text you want to select.
- 2 Drag the pointer to highlight the text, or click in the document to place the insertion point where you want to make a change.

**TIMESAVER** Double-click a word to select it; triple-click a paragraph to select it.

- 3 Perform one of the following editing commands:
  - ◆ To replace text, type your text.
  - ◆ To delete text, press the Backspace key or the Delete key.



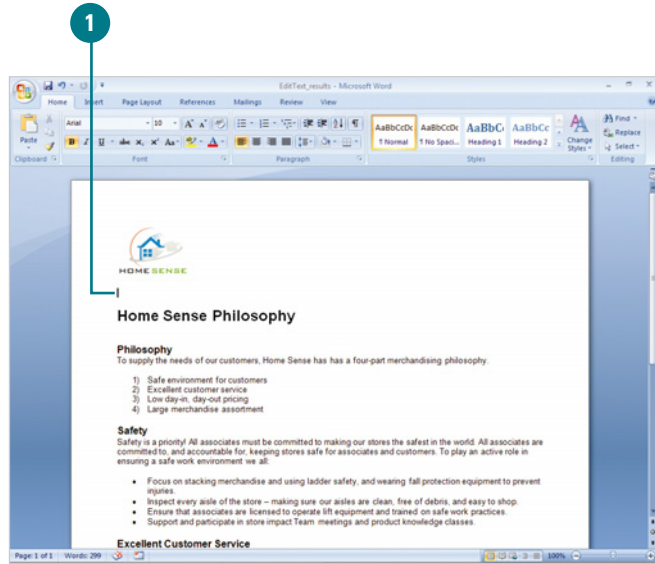
## Correct Typing Errors Using the Keyboard

To Delete	Press
One character at a time to the left of the insertion point	Backspace
One word at a time to the left of the insertion point	Ctrl+Backspace
One character at a time to the right of the insertion point	Delete
One word at a time to the right of the insertion point	Ctrl+Delete
Selected text	Backspace or Delete

## Insert and Delete Text

1 Click in the document to place the insertion point where you want to make the change.

- ◆ To insert text, type your text.
- ◆ To delete text, press the Backspace key or the Delete key.



## Copy or Move Text Using Drag-and-Drop

1 If you want to drag text between programs or documents, display both windows.

2 Select the text you want to move or copy.

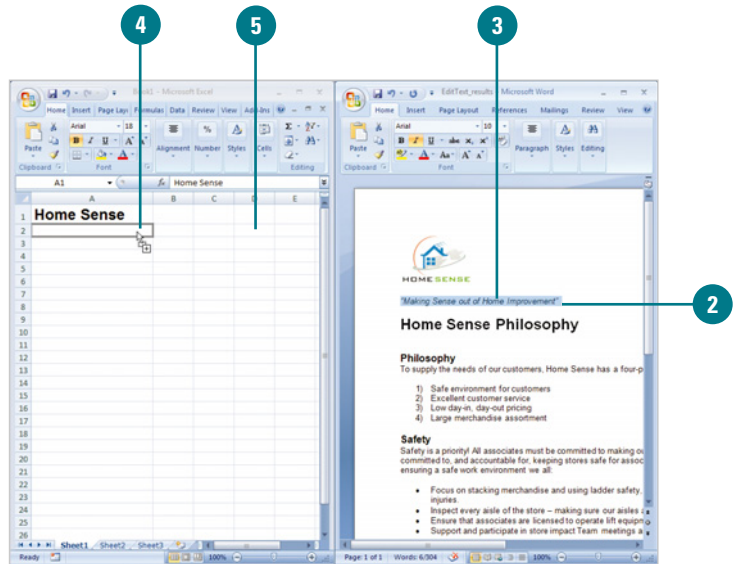
**TIMESAVER** You can also select objects and other elements.

3 Point to the selected text, and then click and hold the mouse button.

If you want to copy the text, also press and hold Ctrl. A plus sign (+) appears in the pointer box, indicating that you are dragging a copy of the selected text.

4 Drag the selection to the new location, and then release the mouse button and keyboard.

5 Click anywhere in the document to deselect the text.



# Copying and Moving Text

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## Copy or Move Using the Clipboard

- 1 Select the element you want to copy.
- 2 Click the **Home** tab.
- 3 Click the **Copy** or **Cut** button.
- 4 Click the location where you want to paste the data.
- 5 Click the **Paste** button.

The data remains on the Clipboard, available for further pasting, until you replace it with another selection.

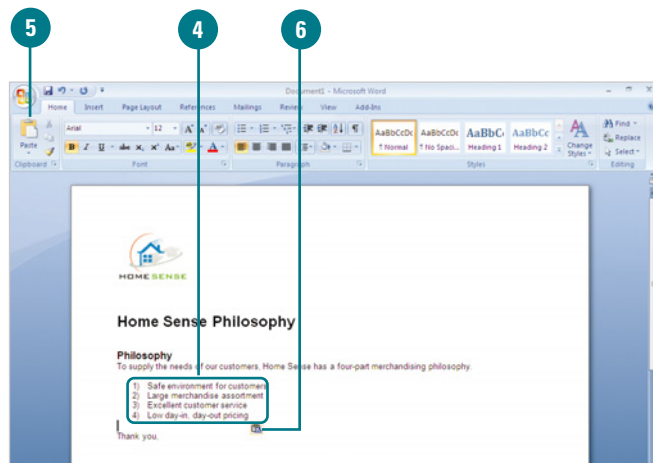
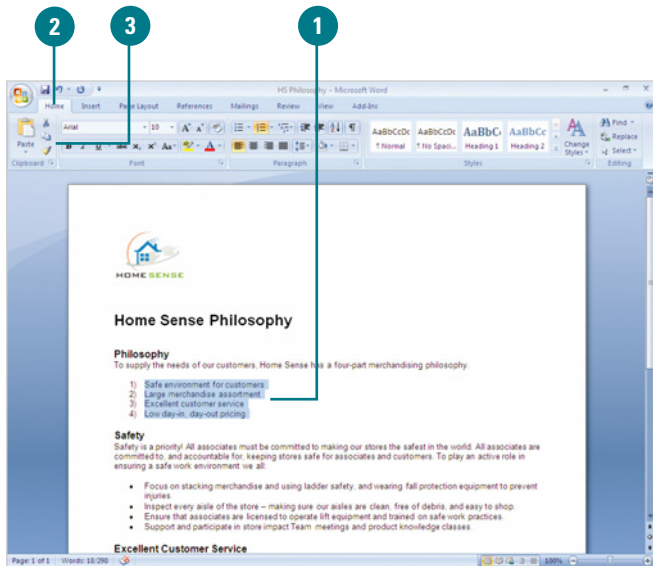
If you don't want to paste this selection anywhere else, press Esc to remove the marquee.

- 6 If you want to change the way the data pastes into the document, click the **Paste Options** button, and then select the option you want.

### Did You Know?

**You can change Office Clipboard options.** At the bottom of the Office Clipboard, you can click the Options button to turn on and off Office Clipboard options.

You can **copy** and **move** text or data from one location to another on any Office document. When you copy data, a duplicate of the selected information is placed on the Clipboard. When you move text, the selected information is removed and placed on the Clipboard. To complete the copy or move, you must **paste** the data stored on the Clipboard in another location. With Microsoft Office, you can use the Clipboard to store multiple pieces of information from several different sources in one storage area shared by all Office programs. You can paste these pieces of information into any Office program, either individually or all at once.

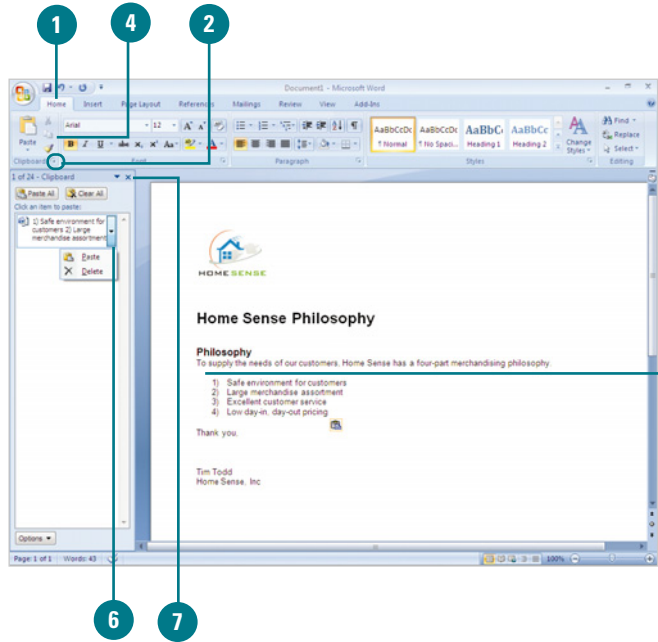


## Copy and Paste Information to the Clipboard Task Pane

- 1 Click the **Home** tab.
- 2 Click the **Clipboard** Dialog Box Launcher.
- 3 Select the data you want to copy.
- 4 Click the **Copy** button.

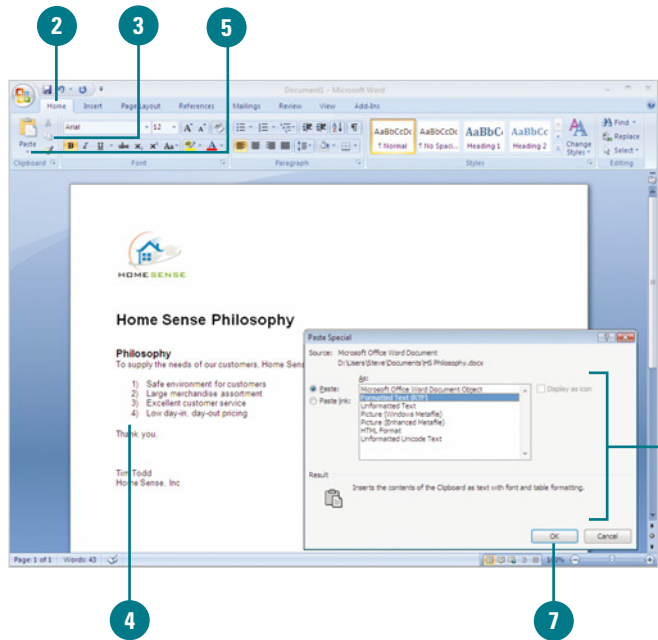
The text or data is copied into the first empty position on the Clipboard task pane.

- 5 Click the location where you want to paste data.
- 6 Click the Clipboard item you want to paste, or point to the item, click the list arrow, and then click **Paste**.
- 7 Click the **Close** button in the task pane.



## Paste Information with Special Results

- 1 Select the text or data that you want to copy.
- 2 Click the **Home** tab.
- 3 Click the **Copy** button.
- 4 Click the location where you want to paste the text or data.
- 5 Click the **Paste** button, and then click **Paste Special**.
- 6 Click the option buttons with the paste results you want.
- 7 Click **OK**.



# Finding and Replacing Text

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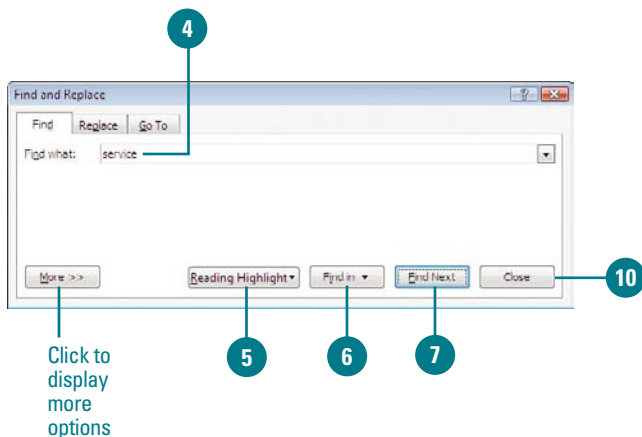
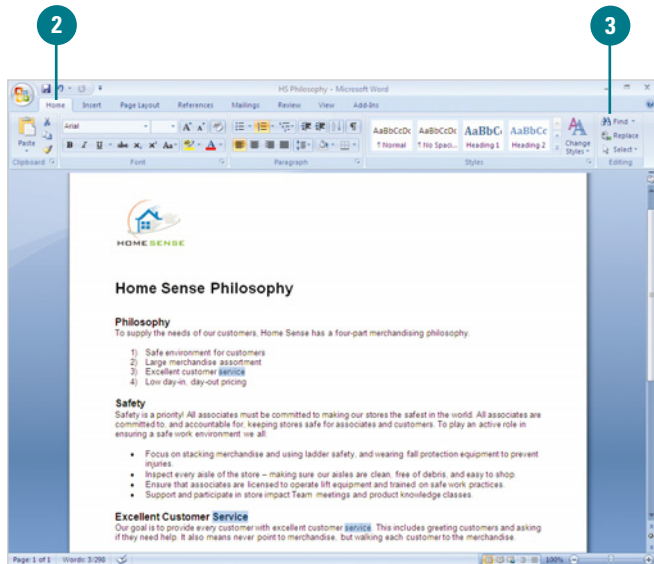
## Find Text

- 1 Click at the beginning of the document.
- 2 Click the **Home** tab.
- 3 Click the **Find** button, and then click **Find**.
- 4 Type the text you want to find.
- 5 To highlight all items found, click the **Reading Highlight** button, and then click **Highlight All**.
- 6 To specify where you want to find, click the **Find in** button, and then click **Current Selection** or **Main Document**.
- 7 Click **Find Next** until the text you want to locate is highlighted.

You can click **Find Next** repeatedly to locate each instance of the content.

- 8 To find all places with the contents you want, click **Find All**.
- 9 If a message box opens when you reach the end of the document, click **OK**.
- 10 Click **Close** or **Cancel**.

The Find and Replace commands make it easy to locate or replace specific text in a document. For example, you might want to find each figure reference in a long report to verify that the proper graphic appears. When you use the Find command, Word highlights the word or phrases that it finds in the document. You can use the Reading Highlight button to specify whether to highlight the current find or all the items found in the document.



## Replace Text

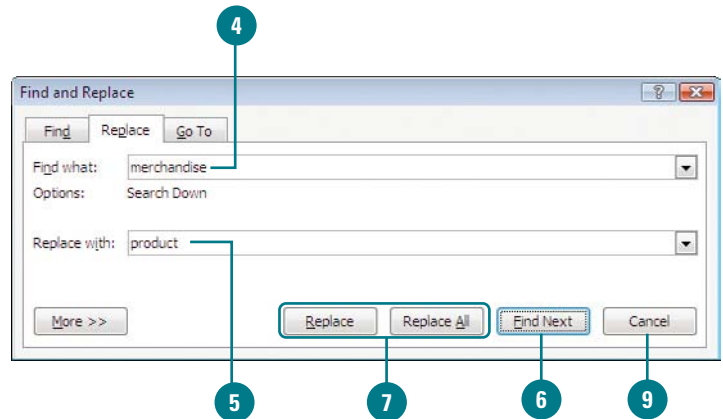
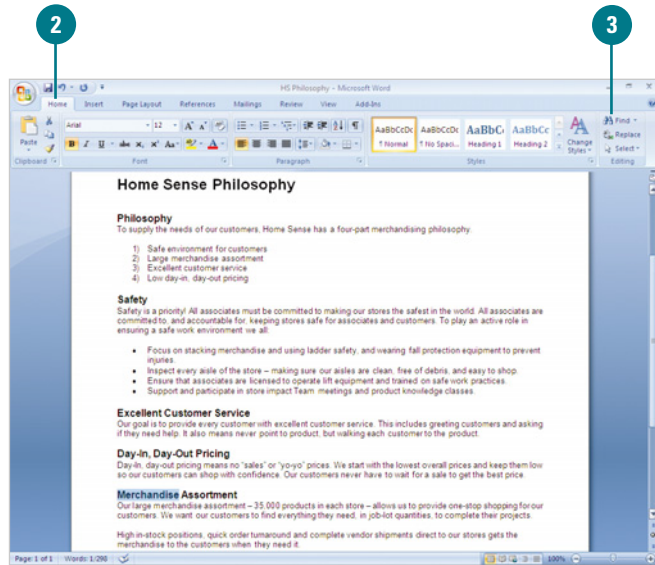
- 1 Click at the beginning of the Office document.
- 2 Click the **Home** tab.
- 3 Click the **Replace** button, and then click **Replace**.
- 4 Type the text you want to search for.
- 5 Type the text you want to substitute.
- 6 Click **Find Next** to begin the search, and then select the next instance of the search text.
- 7 Click **Replace** to substitute the replacement text, or click **Replace All** to substitute text throughout the entire document.

You can click **Find Next** to locate the next instance of the content without making a replacement.

- 8 If a message box appears when you reach the end of the document, click **OK**.
- 9 Click **Close** or **Cancel**.

### Did You Know?

*You can go to different locations in Word.* Click the Home tab, click the Find button arrow, click Go To, select the Go to what option you want, specify a location, and then click Next or Previous. When you're done, click Close.



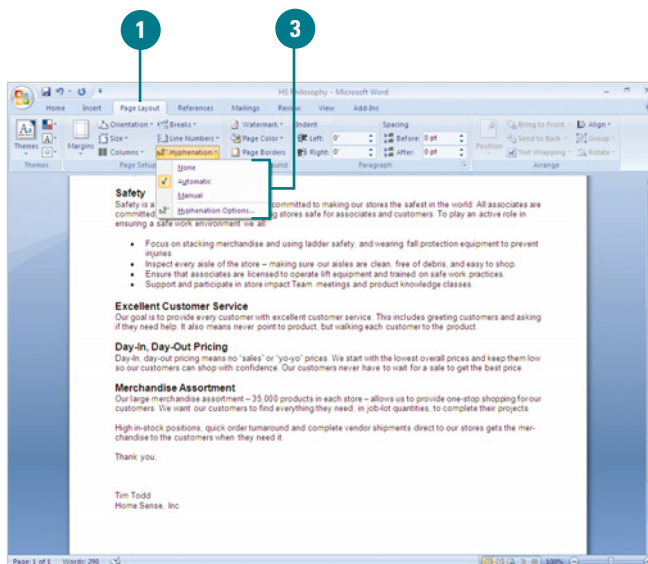
# Inserting Hyphens



If a word doesn't fit at the end of a line, you can set hyphenation options to hyphenate the word to display partly on one line and partly on the next line, or move the word to the beginning of the next line. You can set options to automatically or manually hyphenate words in a document, and to specify the maximum amount of space allowed between a word and the right margin without hyphenating the word. When you manually hyphenate a document, Word searches the text for words to hyphenate and asks if you want to insert a hyphen in the text. You can also manually insert an optional or nonbreaking hyphen. An **optional hyphen** is a hyphen that you specify where you want a word to break if it falls at the end of a line. A **nonbreaking hyphen** prevents a hyphenated word from breaking if it falls at the end of a line.

## Set Hyphenation Options

- 1 Click the **Page Layout** tab.
- 2 To manually hyphenate part of a document, select the text you want to hyphenate first.
- 3 Click the **Hyphenation** button, and then click a hyphenation option:
  - ◆ **None.** Removes automatic hyphens and moves words that break on a line to the next line.
  - ◆ **Automatic.** Inserts a hyphen in a word as needed.
  - ◆ **Manual.** Word searches for text to hyphenate and asks if you want to insert a hyphen.



## Did You Know?

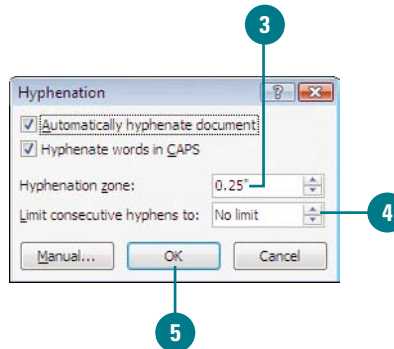
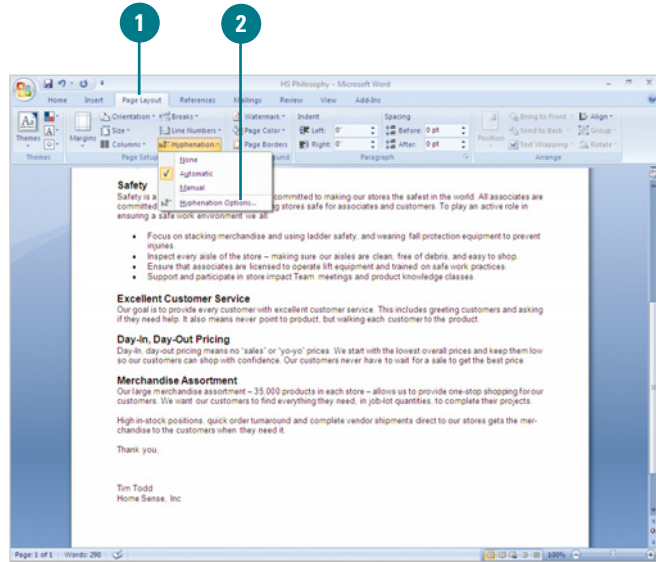
**You can insert an optional or non-breaking hyphen.** Click where you want to insert the hyphen. For an optional hyphen, press Ctrl+Hyphen. For a nonbreaking hyphen, press Ctrl+Shift+Hyphen.

## Customize Hyphenation

- 1 Click the **Page Layout** tab.
- 2 Click the **Hyphenation** button, and then click **Hyphenation Options**.
- 3 In the Hyphenation zone box, specify the maximum amount of space between the word and the right margin you want.
- 4 Specify the limit for hyphens on consecutive lines you want.
- 5 Click **OK**.

### Did You Know?

**You can remove manual hyphens.** Click the Home tab, click Replace, click More if necessary, click Special, and then click Optional Hyphen to remove manual hyphens or Nonbreaking Hyphen to remove nonbreaking hyphens. Leave the Replace with box empty, click Replace All.

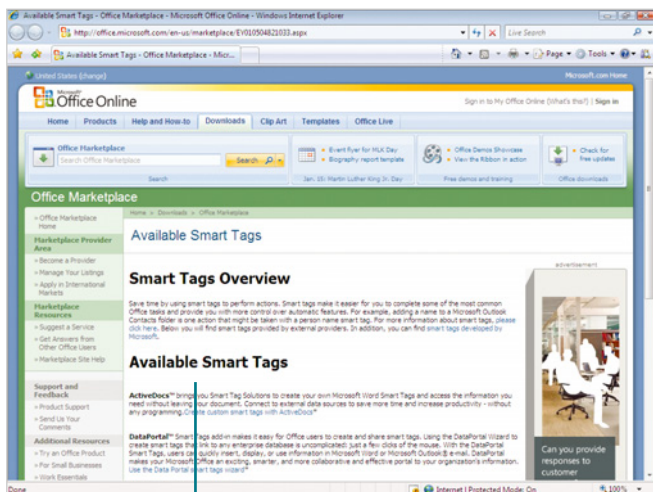
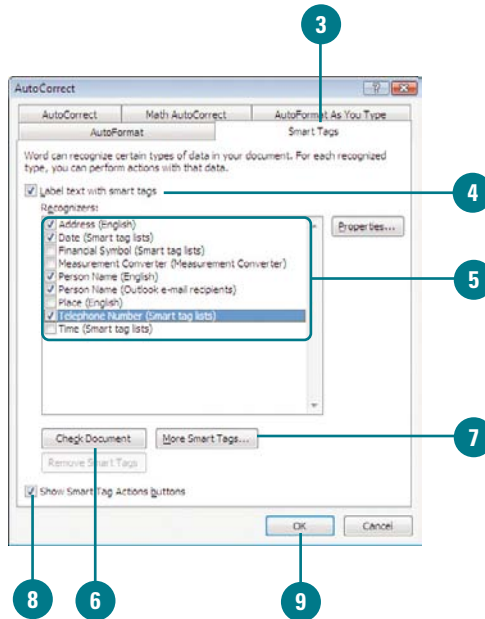


# Inserting Information the Smart Way

## Change Smart Tag Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**, and then click **AutoCorrect Options**.
- 3 Click the **Smart Tags** tab.
- 4 Select the **Label text with smart tags** check box.
- 5 Select the check boxes with the smart tags you want.
- 6 To check the document for new smart tags, click **Check Document**.
- 7 To add more smart tags, click **More Smart Tags...** and then follow the online instructions.
- 8 To embed smart tags for future use, select the **Embed smart tags in this document** check box.
- 9 Click **OK**.
- 10 Click **OK** again.

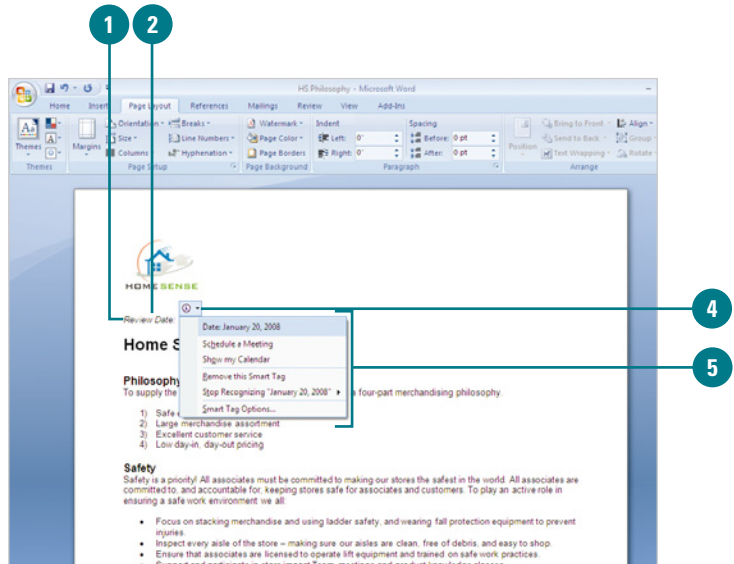
**Smart Tags** help you integrate actions typically performed in other programs directly in an Office program. For example, you can insert a financial symbol to get a stock quote, add a person's name and address in a document to the contacts list in Microsoft Outlook, or copy and paste information with added control. The Office program analyzes what you type and recognizes certain types that it marks with smart tags. The types of actions you can take depend on the type of data in the document with the smart tag.



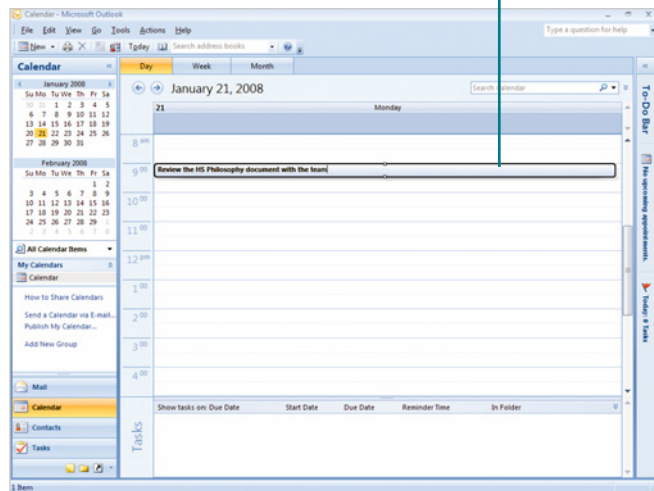
Online resource for Smart Tags

## Insert Information Using a Smart Tag

- 1 Click to place the insertion point where you want to insert a smart tag.
- 2 Type the information needed for the smart tag, such as the date, a recognized financial symbol in capital letters, or a person's name from your contacts list, and then press Spacebar.
- 3 Point the text related to the smart tag to display the Smart Tag button.
- 4 Click the **Smart Tag** button, and then click the list arrow next to the button.
- 5 Click the smart tag option you want; options vary depending on the smart tag.



Outlook Calendar



# Correcting Text Automatically

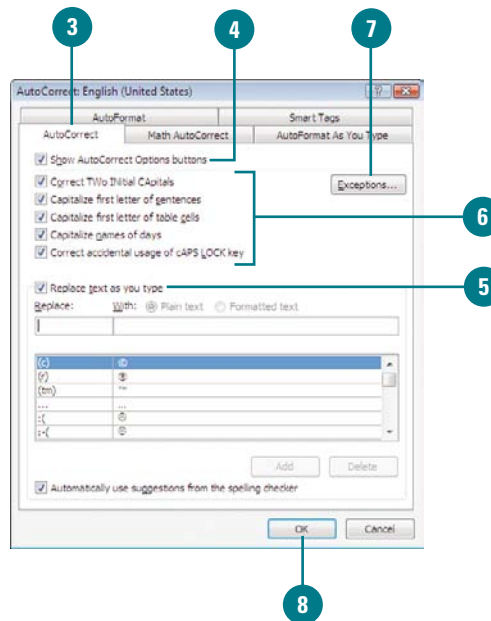
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## Turn On AutoCorrect

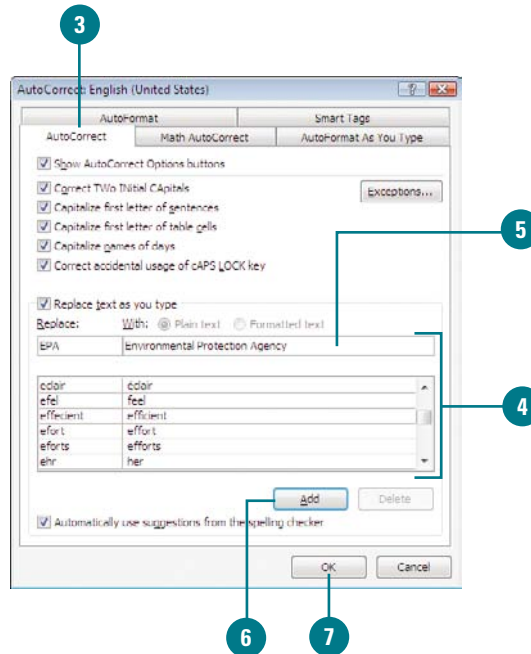
- 1 Click the **Office** button, and then click **Word Options**.
- 2 Click **Proofing**, and then click **AutoCorrect Options**.
- 3 Click the **AutoCorrect** tab.
- 4 Select the **Show AutoCorrect Options buttons** check box to display the button to change AutoCorrect option when corrections arise.
- 5 Select the **Replace text as you type** check box.
- 6 Select the capitalization related check boxes you want AutoCorrect to change for you.
- 7 To change AutoCorrect exceptions, click **Exceptions**, click the **First Letter** or **Initial CAPs** tab, make the changes you want, and then click **OK**.
- 8 Click **OK**.
- 9 Click **OK** again.

Office's **AutoCorrect** feature automatically corrects common capitalization and spelling errors as you type. AutoCorrect comes with hundreds of text and symbol entries you can edit or remove. You can add words and phrases to the AutoCorrect dictionary that you misspell, or add often-typed words and save time by just typing their initials. You can use AutoCorrect to quickly insert symbols. For example, you can type (c) to insert ©. Use the AutoCorrect Exceptions dialog box to control how Word handles capital letters. When you point to a word that AutoCorrect changed, a small blue box appears under the first letter. When you point to the small blue box, the AutoCorrect Options button appears, which gives you control over whether you want the text to be corrected. You can also display the AutoCorrect dialog box and change AutoCorrect settings.



## Add or Edit an AutoCorrect Entry

- 1 Click the **Office** button, and then click **Word Options**.
- 2 Click **Proofing**, and then click **AutoCorrect Options**.
- 3 Click the **AutoCorrect** tab.
- 4 Do one of the following:
  - ◆ **Add.** Type a misspelled word or an abbreviation.
  - ◆ **Edit.** Select the one you want to change.
- 5 Type the replacement entry.
- 6 Click **Add** or **Replace**. If necessary, click **Yes** to redefine entry.
- 7 Click **OK**, and then click **OK** again.



## Replace Text as You Type

- ◆ To correct capitalization or spelling errors automatically, continue typing until AutoCorrect makes the required correction.

Point to the small blue box under the corrected text, and then click the AutoCorrect Options button list arrow to view your options. Click an option, or click a blank area of the document to deselect the AutoCorrect Options menu.

- ◆ To create a bulleted or numbered list, type 1. or \* (for a bullet), press Tab or Spacebar, type any text, and then press Enter. AutoCorrect inserts the next number or bullet. To end the list, press Backspace to erase the extra number or bullet.

## Examples of AutoCorrect Changes

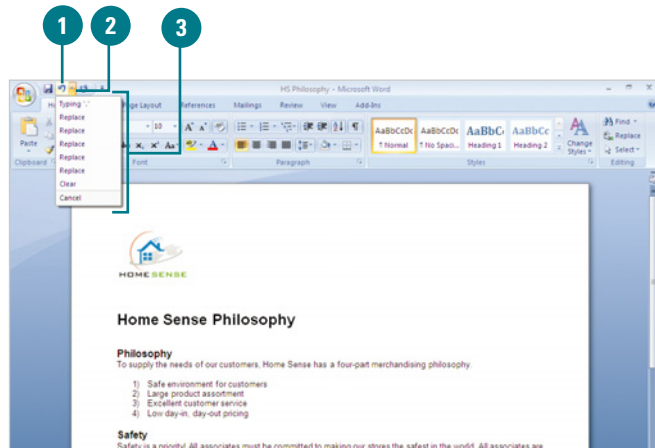
Type of Correction	If You Type	AutoCorrect Inserts
Capitalization	cAP LOCK	Cap Lock
Capitalization	TWO INitial CAPs	Two Initial Caps
Capitalization	thursday	Thursday
Common typos	can;t	can't
Common typos	windoes	windows
Superscript ordinals	2nd	2 <sup>nd</sup>
Stacked fractions	1/2	½
Smart quotes	" "	“ ”
Em dashes	Madison--a small city in Wisconsin--is a nice place to live.	Madison—a small city in Wisconsin—is a nice place to live.
Symbols	(c)	©
Symbols	(r)	®

# Undoing and Redoing an Action

## Undo an Action

- 1 Click the **Undo** button on the Quick Access Toolbar to undo the last action you completed.
- 2 Click the **Undo** button arrow on the Quick Access Toolbar to see recent actions that can be undone.
- 3 Click an action. Word reverses the selected action and all actions above it.

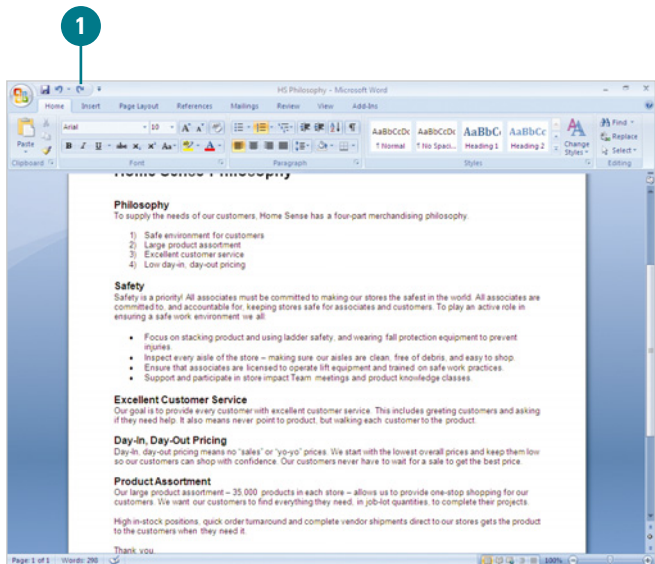
You may realize you've made a mistake shortly after completing an action or a task. The Undo feature lets you "take back" one or more previous actions, including text you typed, edits you made, or commands you selected. For example, if you were to enter a title in a document, and then decide you don't like it, you could undo the entry instead of selecting the text and deleting it. A few moments later, if you decide the text you deleted was alright after all, you could use the Redo feature to restore it.



## Redo an Action

- 1 Click the **Redo** button on the Quick Access Toolbar to restore your last undone action.

**TROUBLE?** If the Redo button is not available on the Quick Access Toolbar, click the *Customize Quick Access Toolbar list arrow*, and then click Redo.



# Formatting Documents

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## Introduction

Once you type a document and get the content how you want it, the finishing touches can sometimes be the most important. An eye catching document will draw the reader in, while a boring font without a lot of extra details will draw the reader away from all your hard work. To create that interest, Microsoft Office Word 2007 can help you change your document for a fresh look. One of the first elements you can change is your font attributes. Applying bold, underline, or italics when appropriate, can emphasize text. You might find that having different font sizes in your document to denote various topics will also enhance your document.

You can change the **kerning**—the amount of space between each individual character, for a special effect on a title or other parts of text. You can also apply a dropped capital letter to introduce a body of text, add a shading or border onto your document.

Word has various tools to help you format your document. You can search and replace formatting effects, display rulers, change a paragraph alignment, set paragraph tabs and indents, and change your line spacing. There are times when typing a paragraph will not do your text justice. Creating a bulleted or numbered list might better show your information. To further enhance the appearance of the text in a paragraph, you can quickly add a border and shading to selected text. If you have confidential information in a document or text that you don't want others to see, you can use a formatting option to hide the text.

## What You'll Do

**Format Text**

**Format Text for Emphasis**

**Change Character Spacing**

**Select Text with Similar Formatting**

**Find and Replace Formatting**

**Find and Replace Custom Formatting**

**Change Paragraph Alignment**

**Change Line Spacing**

**Display Rulers**

**Set Paragraph Tabs**

**Set Paragraph Indents**

**Create Bulleted and Numbered Lists**

**Add Borders and Shading**

**Hide Text**

# Formatting Text

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## Format Text Quickly

- 1 Select the text you want to format.
- 2 Click the **Home** tab.
- 3 To change fonts, click the **Font** list arrow on the Ribbon or Mini-Toolbar, and then point for a live preview (**New!**), or click the font you want, either a theme font (**New!**) or any available fonts.

The font name appears in the font style.

To change the font size, click one or more of the font size buttons on the Ribbon or Mini-Toolbar:

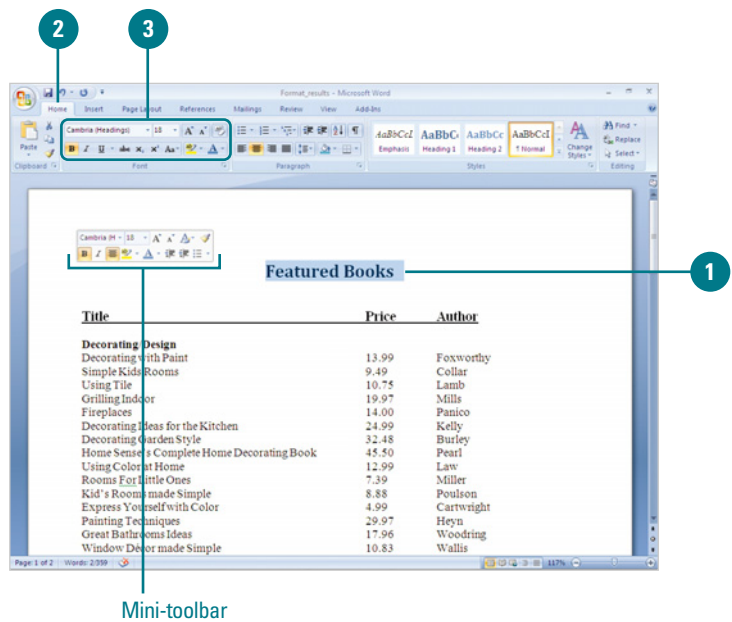
- ◆ Click the **Font Size** list arrow, and then click the font size you want.
- ◆ Click the **Increase Font Size** button (**New!**) or **Decrease Font Size** button (**New!**).

To apply other formatting, click one or more of the formatting buttons on the Ribbon or Mini-Toolbar:

**Bold**, **Italic**, **Underline** (**New!**), **Shadow**, **Strikethrough** (**New!**), or **Font Color**.

- ◆ To select an underline style, click the **Underline** button arrow, and then select a style or color.

A **font** is a collection of alphanumeric characters that share the same typeface, or design, and have similar characteristics. You can format text and numbers with font attributes—such as bolding, italics, or underlining—to enhance data to catch the reader's attention. The main formats you apply to text are available on the Home tab in the Font group or in the Font dialog box. Some of the formats available include strikethrough, subscript, superscript, and underline style and color (**New!**). When you point to selected text, Office displays the Mini-Toolbar above it. The **Mini-Toolbar** (**New!**) provides easy access to common formatting toolbar buttons, such as font, font size, increase and decrease font size, bold, italic, font color, and increase and decrease list level. If you don't want to display the Mini-Toolbar, you can use Word Options to turn it off.



## Format Text Using the Font Dialog Box

1 Select the text you want to format.

2 Click the **Home** tab.

3 Click the **Font** Dialog Box Launcher.

The Font dialog box opens, displaying the Font tab.

4 Select the font, font style, and font size you want.

5 If you want, click **Font Color**, and then click a color.

6 If you want, click **Underline** list arrow, click a style, click **Underline Color** list arrow, and then click a color.

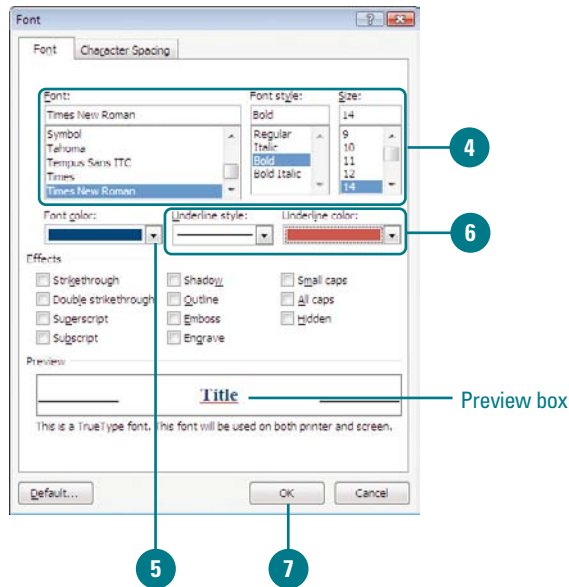
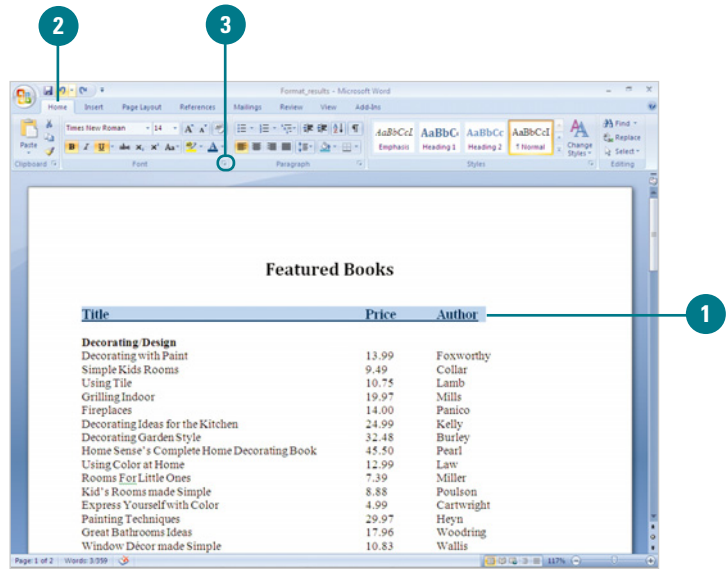
7 Click **OK**.

### Did You Know?

**You can tell the difference between a TrueType and printer font.** A TrueType (outline) font is a font that uses special software capabilities to print exactly what is seen on the screen. A printer (screen) font is a font that comes only in specified sizes. If you are creating a document for publication, you need to use printer fonts.

**What is a point?** The size of each font character is measured in points (a point is approximately 1/72 of an inch).

**Each computer has different fonts installed.** Users with whom you share files may not have all the fonts you've used in a document installed on their computers.



# Formatting Text for Emphasis

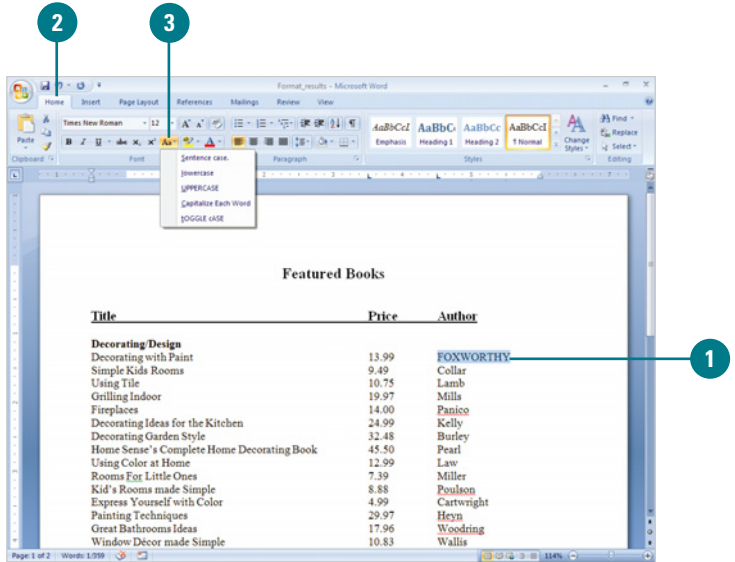
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## Change Text Case

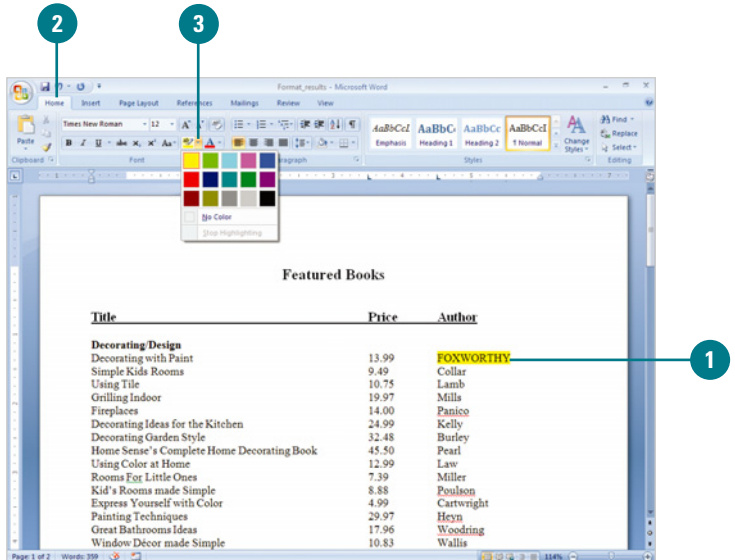
- 1 Select the text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Case** button, and then click the option you want:
  - ◆ Sentence case.
  - ◆ lowercase
  - ◆ UPPERCASE
  - ◆ Capitalize Each Word
  - ◆ tOGGLEcASE

You'll often want to format, or change the style of, certain words or phrases to add emphasis to parts of a document. In addition to the standard formatting options—**Bold**, *Italic*, Underline, etc.—Word provides additional formatting effects to text, including Strikethrough, Double Strikethrough, Superscript, Subscript, Shadow, Outline, Emboss, Engrave, Small Caps, All Caps, and Hidden. To help you format sentences correctly and change capitalization, you can change text case.



## Highlight Text

- 1 Select the text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Highlight** button arrow, and then click the color you want.
  - ◆ **Add highlight.** Click a color.
  - ◆ **Remove highlight.** Click **No Color.**

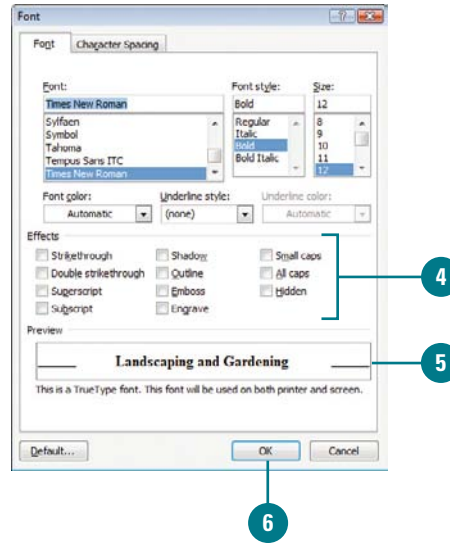


## Apply Formatting Effects to Text

- 1 Select the text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Font** Dialog Box Launcher.
- 4 Click to select the effects (**Strike-through**, **Double strikethrough**, **Superscript**, **Subscript**, **Shadow**, **Outline**, **Emboss**, **Engrave**, **Small caps**, **All caps**, and **Hidden**) you want.
- 5 Check the results in the Preview box.
- 6 Click **OK**.

### Did You Know?

**You can quickly clear formatting.** Select the text to which you want to clear formatting, click the Home tab, and then click the Clear Formatting button.



# Changing Character Spacing

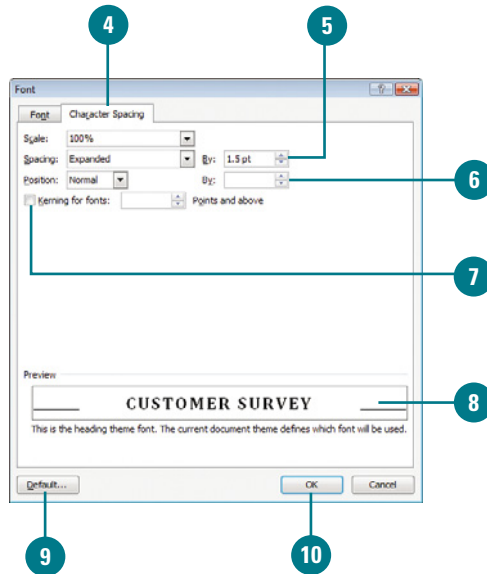
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## Change Character Spacing

- 1 Select the text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Font** Dialog Box Launcher.
- 4 Click the **Character Spacing** tab.
- 5 Click the **Spacing** list arrow, click an option, and then specify a point size to expand or condense spacing by the amount specified.
- 6 Click the **Position** list arrow, click an option, and then specify a point size to raise or lower the text in relation to the baseline (bottom of the text).
- 7 Select the **Kerning for fonts** check box, and then specify a point size.
- 8 Check the results in the Preview box.
- 9 To make the new formatting options the default for all new Word documents, click **Default**, and then click **Yes**.
- 10 Click **OK**.

**Kerning** is the amount of space between each individual character that you type. Sometimes the space between two characters is larger than others, which makes the word look uneven. You can use the Font dialog box to change the kerning setting for selected characters. Kerning works only with TrueType or Adobe Type Manager fonts. You can expand or condense character spacing to create a special effect for a title, or re-align the position of characters to the bottom edge of the text—this is helpful for positioning the copyright or trademark symbols.



# Selecting Text with Similar Formatting

## Select Similar Text Formatting

- 1 Select the text you want to find.
- 2 Click the **Home** tab.
- 3 Click the **Select** button, and then click **Select Text with Similar Formatting**.

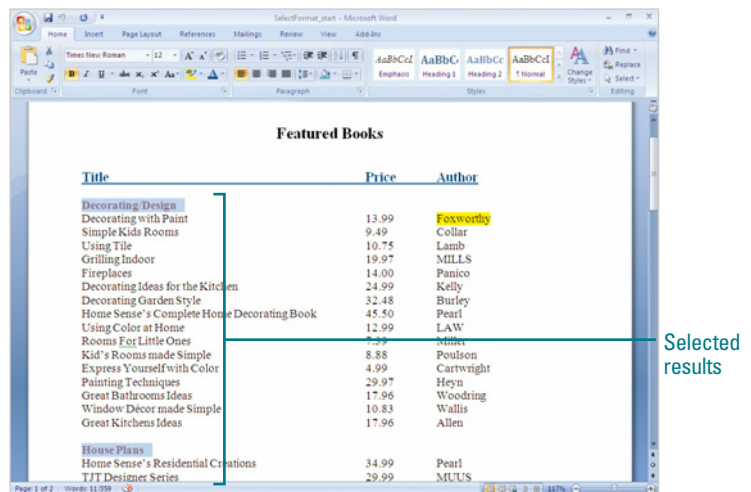
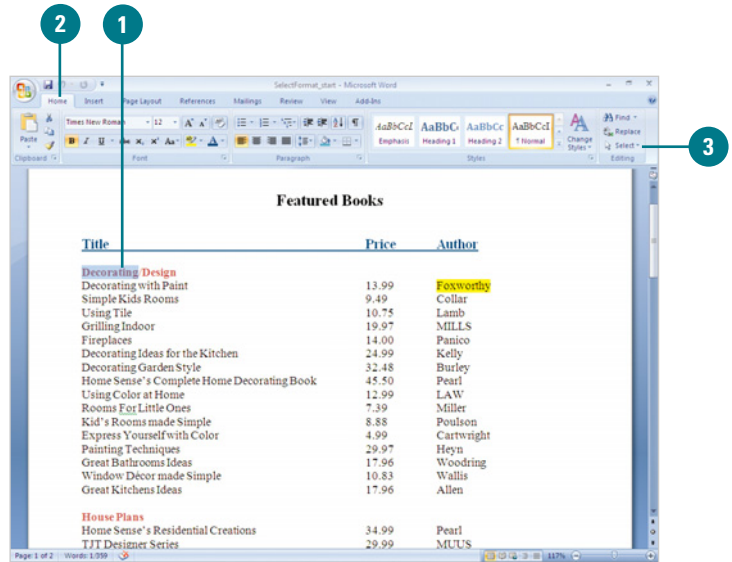
### Did You Know?

**You can quickly clear formatting.** Select the text to which you want to clear formatting, click the Home tab, and then click the Clear Formatting button.

### See Also

See "Revealing Formatting Styles" on page 94 for more information on using the Select Text with Similar Formatting command.

A quick way to select text with similar formatting is to use the Select Text with Similar Formatting command. After you select the text with the formatting you want to find, click the Select button on the Home tab, and then choose the Select Text with Similar Formatting command. Word highlights all the text with similar formatting in the document. With the text selected, you can change the text formatting.



# Finding and Replacing Formatting

## Find Formatting

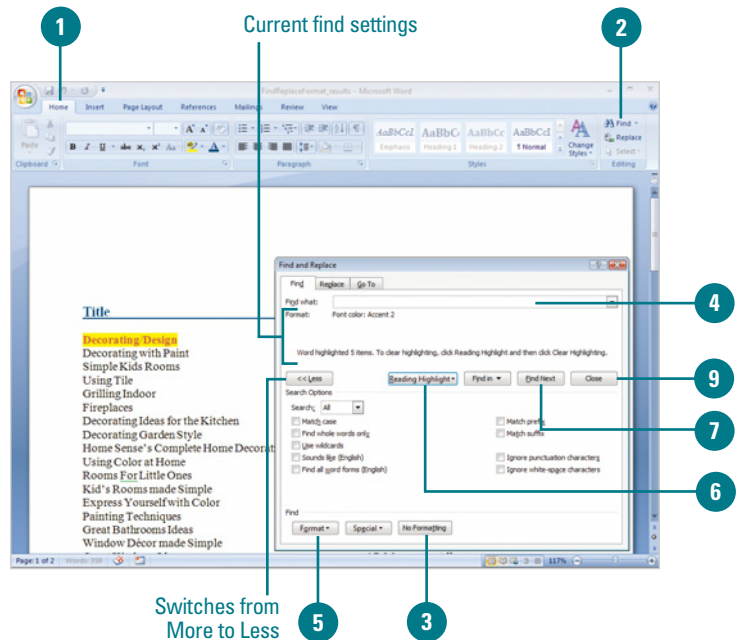
- 1 Click the **Home** tab.
- 2 Click the **Find** button.
- 3 To clear any previous settings, click **No Formatting**.
- 4 If you want to locate formatted text, type the word or words.
- 5 Click **More**, click **Format**, and then click the formatting you want to find.
- 6 To highlight located items, click **Reading Highlight**, and then click **Highlight All (New!)**.
- 7 Click **Find Next** to select the next instance of the formatted text.
- 8 Click **OK** to confirm Word finished the search.
- 9 Click **Close** or **Cancel**.

### Did You Know?

#### *You can find an item or location.*

You can search for an item, such as bookmark or comment, or location, such as a page or section. Click the Home tab, click the Find button arrow, click Go To, click an item to find, enter an item number or name, click Next, Previous, or Go To to location the item, and then click Close.

Suddenly you realize all the bold text in your report would be easier to read in italics. Do you spend time making these changes one by one? No. The Find and Replace feature locates the formatting and instantly substitutes new formatting. If your search for a formatting change is an easy one, click Less in the Find and Replace dialog box to decrease the size of the dialog box. If your search is a more complex one, click More to display additional options. With the Format button, you can find text or other elements with specific font, paragraph, tabs, language, frame, style, or highlight attributes. The Reading Highlight button highlights items found to make them easier to read (**New!**).



## Replace Formatting

- 1 Click the **Home** tab.
- 2 Click the **Replace** button.
- 3 If you want to locate formatted text, type the word or words.
- 4 Press Tab, and then type any text you want to substitute.
- 5 Click the **More** button, click **Format**, and then click the formatting you want to find. When you're done, click **OK**.
- 6 Click **Format**, and then click the formatting you want to substitute. When you're done, click **OK**.
- 7 To substitute every instance of the formatting, click **Replace All**.

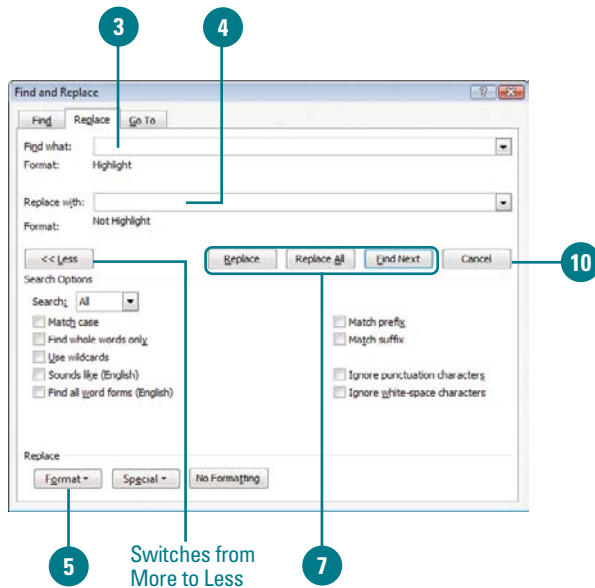
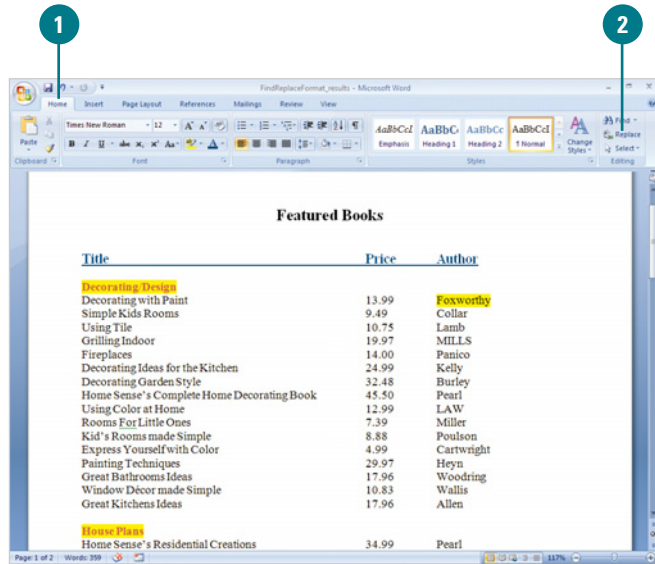
To substitute the formatting one instance at a time, click **Find Next**, and then click **Replace**.

If you want to cancel the replace, click **Cancel**.

- 8 If necessary, click **Yes** to search from the beginning of the document.
- 9 Click **OK** to confirm Word finished searching.
- 10 Click **Close** or **Cancel**.

### Did You Know?

**You can find and replace special characters and document elements.** In Word, you can search for and replace special characters (for example, an em dash) and document elements (for example, a tab character). Click **More** in the Find and Replace dialog box, click **Special**, and then click the item you want from the menu.

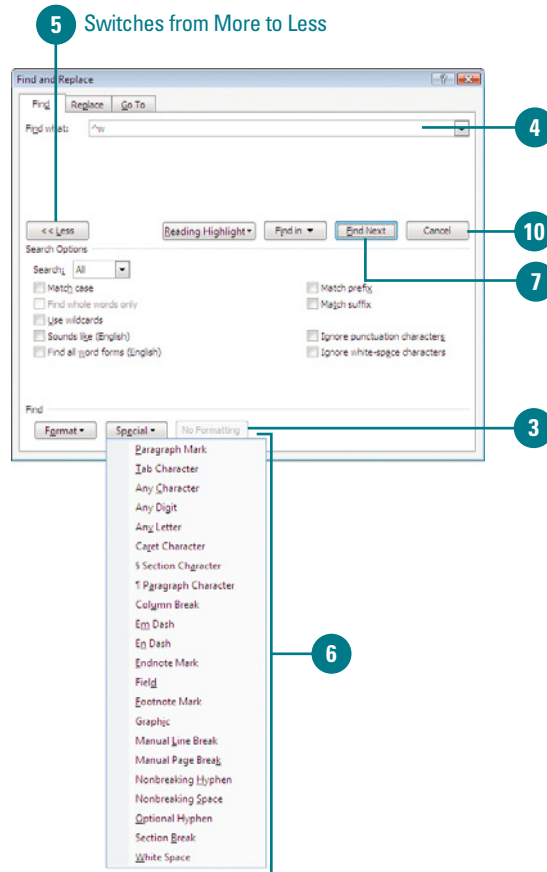


# Finding and Replacing Custom Formatting

## Find or Replace Special Formatting

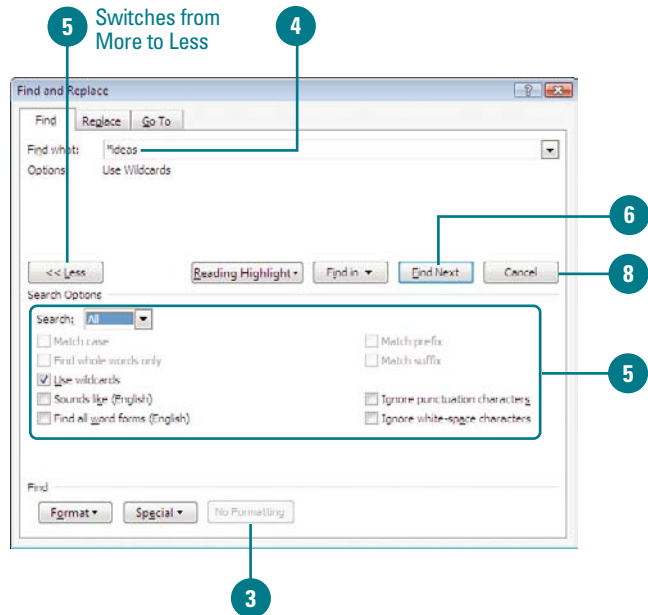
- 1 Click the **Home** tab.
- 2 Click the **Find** or **Replace** button.
- 3 To clear any previous settings, click **No Formatting**.
- 4 If you want to locate formatted text, type the word or words you want to find and/or replace.
- 5 Click **More** to expand the dialog box.
- 6 Click **Special**, and then click the specialized formatting item you want to find.
- 7 Click **Find Next** to select the next instance of the formatted text.
- 8 To substitute every instance of the formatting, click **Replace All**.  
  
To substitute the formatting one instance at a time, click **Find Next**, and then click **Replace**.
- 9 Click **OK** to confirm Word finished the search.
- 10 Click **Close** or **Cancel**.

If your search for formatting involves a complex search for a specific type of formatted text, click **More** in the Find and Replace dialog box to increase the size of the dialog box and display additional options. The expanded Find and Replace dialog box provides options to find exact capitalization, find whole words only, use wildcards, and locate words that sound like English or different forms of English words. With the **Special** button, you can find and replace special characters and elements, such as graphics, tabs, fields, white space, and page breaks.



## Use Find and Replace Options

- 1 Click the **Home** tab.
- 2 Click the **Find** or **Replace** button.
- 3 To clear any previous settings, click **No Formatting**.
- 4 If you want to locate formatted text, type the word or words you want to find and/or replace.
- 5 Click **More**, and then select or clear the options you want:
  - ◆ **Search.** Select a search direction: All, Down, or Up.
  - ◆ **Match Case.** Select to find exact capitalization.
  - ◆ **Find whole words only.** Select to find words with space on either side.
  - ◆ **Use wildcards.** Select to use wildcards, such as asterisk (\*) or question mark (?).
  - ◆ **Sounds like (English).** Select to find English sounding words.
  - ◆ **Find all word forms (English).** Select to find all English forms of a word.
  - ◆ **Match prefix** or **Match suffix.** Select to find text at the beginning or end of a word.
  - ◆ **Ignore punctuation characters** or **Ignore white-space characters.** Select to ignore punctuation (periods, commas, etc.) or white space characters.
- 6 Click **Find Next** to select the next instance of the formatted text, or click **Replace**
- 7 Click **OK** to confirm Word finished the search.
- 8 Click **Close** or **Cancel**.



## For Your Information

### Using Wildcards

A wildcard allows you to search for variable text. For example, you can use the asterisk (\*) wildcard to search for a string of characters ("s\*d" finds "sad" and "started"), or use the question mark (?) wildcard to search for any single character (s?t finds "sat" and "set"). To search for a character that's defined as a wildcard, type a backslash (\) before the character. For example, type \? to find a question mark.

# Changing Paragraph Alignment

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## Align New Text with Click-And-Type

- ◆ Position the I-beam at the left, right, or center of the line where you want to insert new text.






When the I-beam shows the appropriate alignment, double-click to place the insertion point, and then type your text.

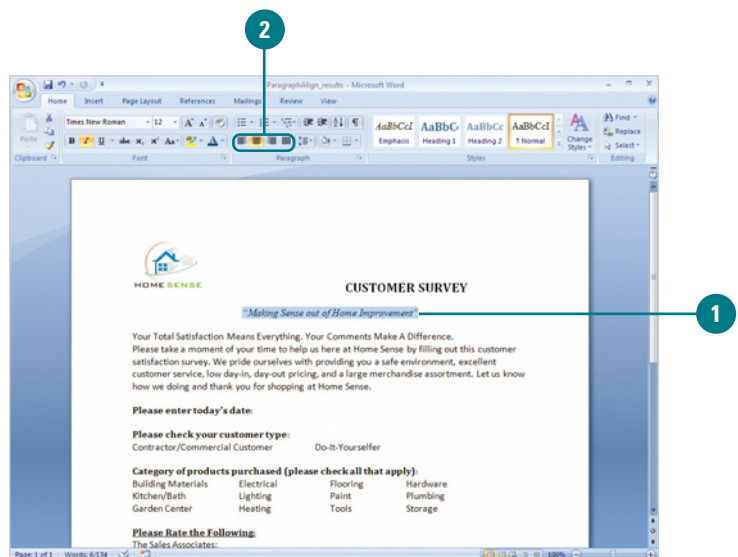
## Align Existing Text

- 1 Position the I-beam, or select at least one line in each paragraph to align.
- 2 Click the appropriate button on the Home tab.
  - ◆ **Align Left** button
  - ◆ **Center** button
  - ◆ **Align Right** button
  - ◆ **Justify** button

Text starts out positioned evenly along the left margin, and uneven, or **ragged**, at the right margin. Left-aligned text works well for body paragraphs in most cases, but other alignments vary the look of a document and help lead the reader through the text. **Right-aligned text**, which is even along the right margin and ragged at the left margin, is good for adding a date to a letter. **Justified text** spreads text evenly between the margins, creating a clean, professional look, often used in newspapers and magazines. **Centered text** is best for titles and headings. You can use Click-And-Type to quickly center titles or set different text alignment on the same line, or you can use the alignment buttons on the Home tab to set alignment on one or more lines.

## Click-And-Type Text Pointers

Pointer	Purpose
	Left-aligns text
	Right-aligns text
	Centers text
	Creates a new line in the same paragraph
	Creates a text around a picture



# Changing Line Spacing

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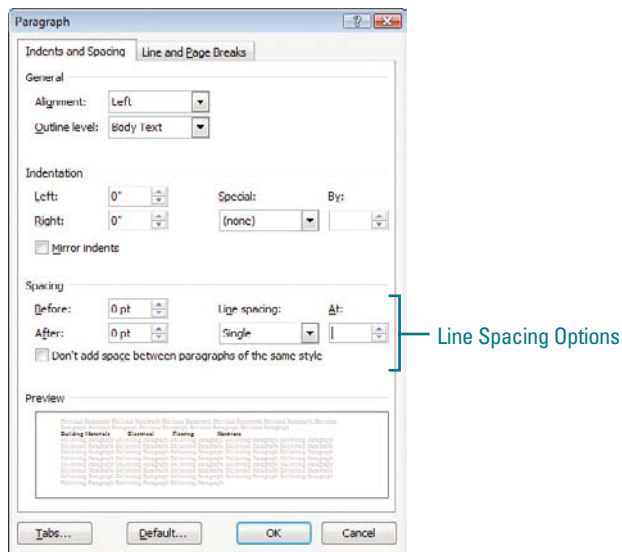
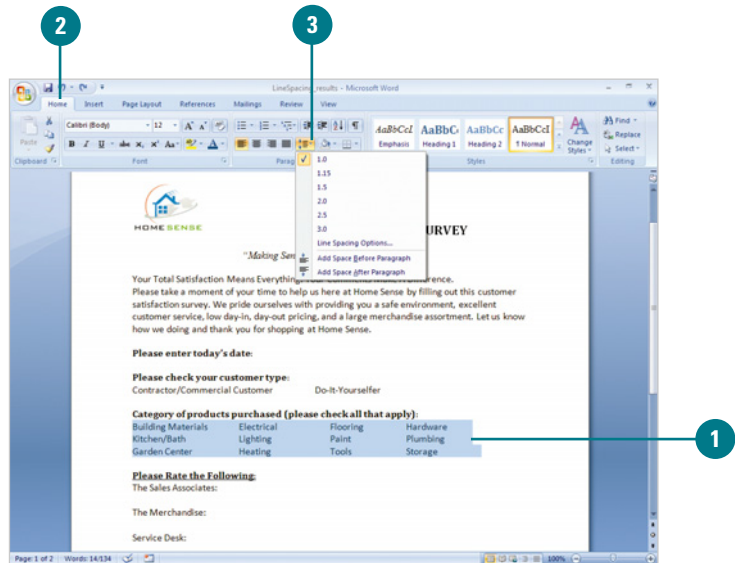
## Change Line Spacing

- 1 Select the text you want to change.
- 2 Click the **Home** tab.
- 3 Click the **Line Spacing** button arrow, and then click a spacing option.

- ◆ To apply a new setting, click the number you want.
- ◆ To apply the setting you last used, click the **Line Spacing** button.
- ◆ To enter precise parameters, click **Line Spacing Options**, specify the line or paragraph settings you want, and then click **OK**.
- ◆ To apply the setting you last used, click **Add Space Before Paragraph** or **Add Space After Paragraph**.

**TIMESAVER** Press **Ctrl+1** for single-spacing, **Ctrl+5** for 1.5 spacing, or **Ctrl+2** for double-spacing.

The lines in all Word documents are single-spaced by default, which is appropriate for letters and most documents. But you can easily change your document line spacing to double or 1.5 lines to allow extra space between every line. This is useful when you want to make notes on a printed document. Sometimes, you'll want to add space above and below certain paragraphs, for headlines, or indented quotations to help set off the text.



# Displaying Rulers

## Show and Hide the Rulers

- 1 Click the **View** tab.
- 2 Select or clear the **Ruler** check box.

**TIMESAVER** Click the **View Ruler** button at the top of the vertical scroll bar.

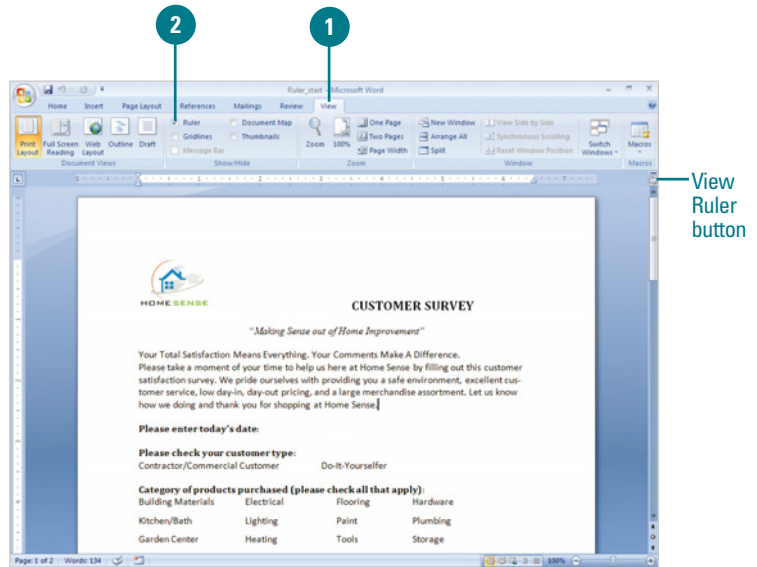
- ◆ To view the horizontal ruler, click the **Web Layout View** or **Draft View** button.
- ◆ To view the horizontal and vertical rulers, click the **Print Layout View** button.

### Did You Know?

**You can change the ruler measurements.** Change the ruler to show inches, centimeters, millimeters, points, or picas. Click the Office button, click Word Options, click Advanced, click the Show measurement in Units of list arrow, select the measurement you want, and then click OK.

**You can set your text to be hyphenated.** Hyphenation prevents ugly gaps and short lines in text. Click the Page Layout tab, click the Hyphenation button, and then click None, Automatic, or Manual, or Hyphenation Options. Click Hyphenation Options to set the hyphenation zone and limit the number of consecutive hyphens (usually two), and then click OK.

Rulers in Word do more than measure. The **horizontal ruler** above the document shows the length of the typing line and lets you quickly adjust left and right margins and indents, set tabs, and change column widths. The **vertical ruler** along the left edge of the document lets you adjust top and bottom margins and change table row heights. You can hide the rulers to get more room for your document. As you work with long documents, use the document map to jump to any heading in your document. Headings are in the left pane and documents in the right.



# Setting Paragraph Tabs

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## Create and Clear a Tab Stop

- 1 Select one or more paragraphs in which you want to set a tab stop.
- 2 Click the **Tab** button on the horizontal ruler until it shows the type of tab stop you want; see the table for more information about tab stops.
- 3 Click the ruler where you want to set the tab stop.
- 4 If necessary, drag the tab stop to position it where you want.

To display a numerical measurement in the ruler where the tab is placed, press and hold Alt as you drag.

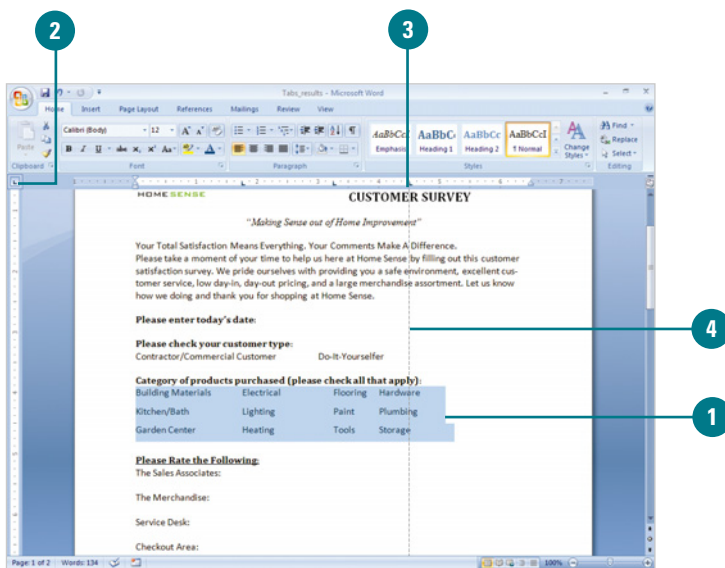
- 5 To clear a tab stop, drag it off the ruler.

### Did You Know?

#### **You can view formatting marks.**

Sometimes it's hard to see the number of spaces or tabs between words. You can change the view to display formatting marks, a period for space and an arrow for tabs. Click the Home tab, and then click Show/Hide ¶ button to toggle on and off. Click the Office button, click Word Options, click Display, select the formatting mark check boxes you want to view, and then click OK.

In your document, **tabs** set how text or numerical data aligns in relation to the document margins. A **tab stop** is a predefined stopping point along the document's typing line. Default tab stops are set every half-inch, but you can set multiple tabs per paragraph at any location. Choose from four text tab stops: left, right, center, and decimal (for numerical data). The bar tab inserts a vertical bar at the tab stop. You can use the Tab button on the horizontal ruler to switch between the available tabs.



## Tab Stops

Tab Stop	Purpose
└	Aligns text to the left of the tab stop
┌	Aligns text to the right of the tab stop
┆	Centers text on the tab stop
┆	Aligns numbers on the decimal point
┆	Inserts a vertical bar at the tab stop

# Setting Paragraph Indents

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WD07S-4.2.3

## Indent Paragraph Lines Precisely

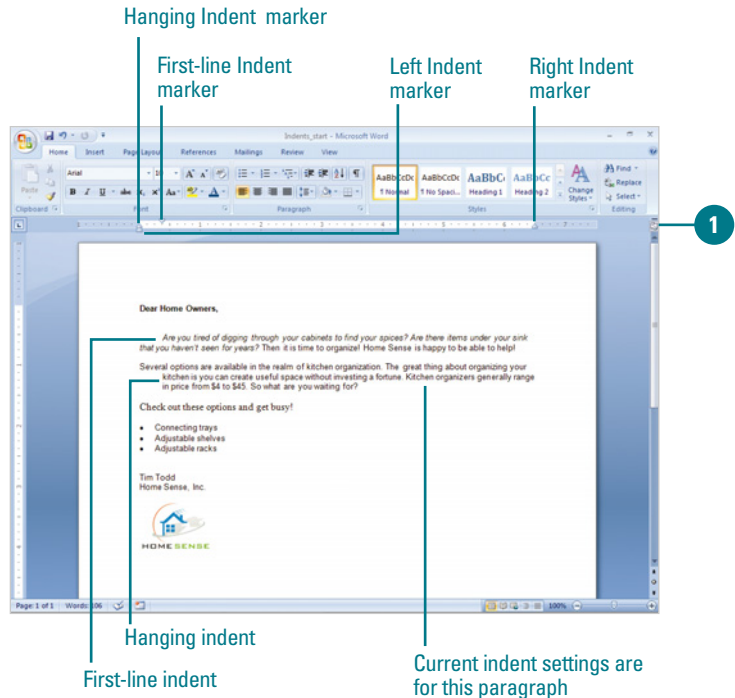
- 1 Click the **View Ruler** button to display the Ruler.
- 2 Click the paragraph or select multiple paragraphs to indent:
  - ◆ To change the left indent of the first line, drag the First-line Indent marker.
  - ◆ To change the indent of the second and subsequent lines, drag the Hanging Indent marker.
  - ◆ To change the left indent for all lines, drag the Left Indent marker.
  - ◆ To change the right indent for all lines, drag the Right Indent marker.

As you drag a marker, the dotted guideline helps you accurately position the indent. You can also press and hold Alt to see a measurement in the ruler.

### Did You Know?

**You can indent using the Tab key.** You can indent the first line of a paragraph by clicking at the beginning of the paragraph, and then pressing Tab. You can indent the entire paragraph by selecting it, and then pressing Tab.

Quickly indent lines of text to precise locations from the left or right margin with the horizontal ruler. Indent the first line of a paragraph (called a **first-line indent**) as books do to distinguish paragraphs. Indent the second and subsequent lines of a paragraph from the left margin (called a **hanging indent**) to create a properly formatted bibliography. Indent the entire paragraph any amount from the left and right margins (called **left indents** and **right indents**) to separate quoted passages.

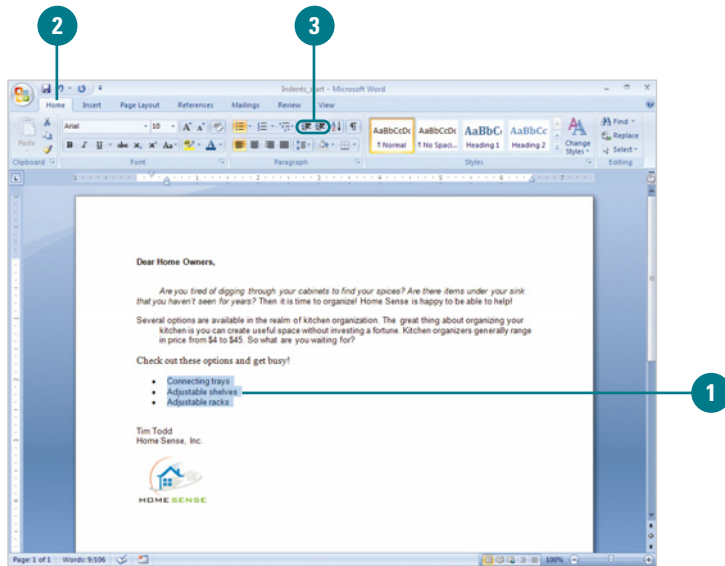


## Indent a Paragraph

- 1 Click the paragraph, or select multiple paragraphs to indent.
- 2 Click the **Home** tab.
- 3 Click the **Increase Indent** button or **Decrease Indent** button to move the paragraph right or left one-half inch.

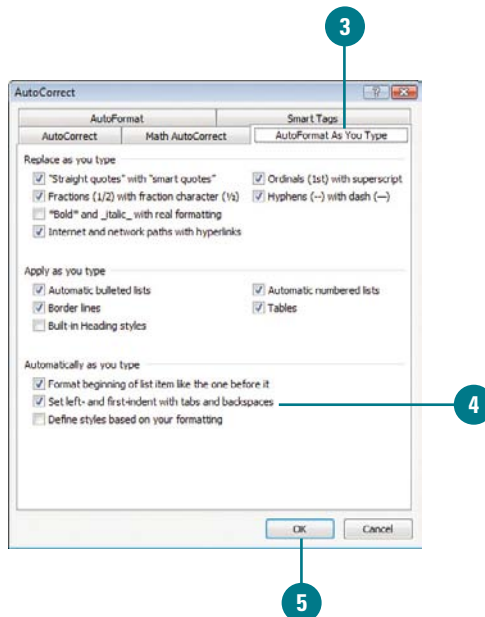
### Did You Know?

*You can add line numbers to a document or page.* Click the Page Layout tab, click the Line Numbers button, and then click Continuous, Restart Each Page, Restart Each Section, Suppress for Current Paragraph, or Line Numbering Options.



## Set Indentation Using the Tab Key

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**, and then click **AutoCorrect Options**.
- 3 Click the **AutoFormat As You Type** tab.
- 4 Select the **Set left- and first-indent with tabs and backspaces** check box.
- 5 Click **OK**.



# Creating Bulleted and Numbered Lists

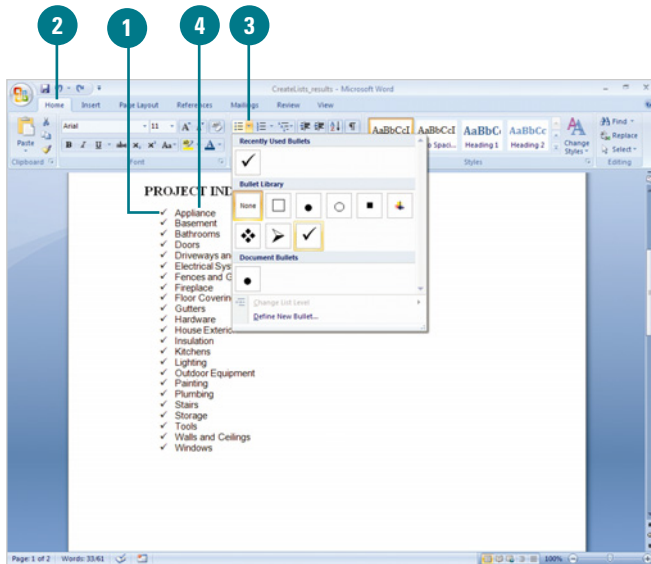
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## Create a Bulleted List

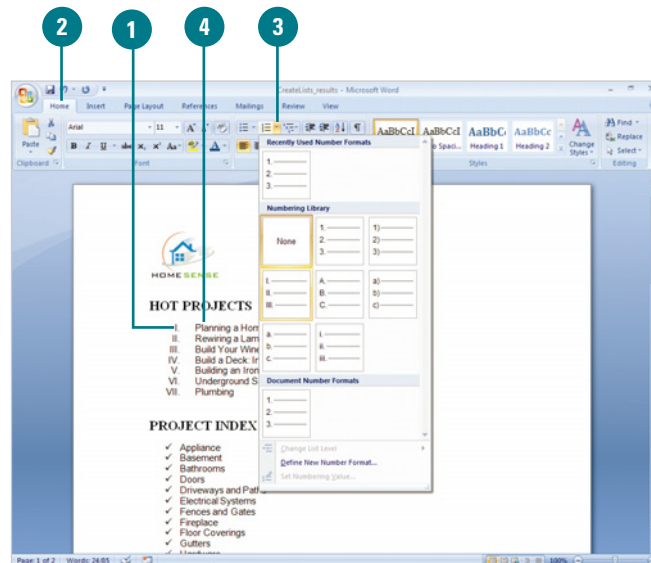
- 1 Click where you want to create a bulleted list.
- 2 Click the **Home** tab.
- 3 Click the **Bullets** button arrow, and then select a bullet style.
- 4 Type the first item in your list, and then press Enter.
- 5 Type the next item in your list, and then press Enter.
- 6 Click the **Bullets** button, or press Enter again to end the list.

The best way to draw attention to a list is to format the items with bullets or numbers. You can even create multi-level lists. For different emphasis, change any bullet or number style to one of Word's many predefined formats. For example, switch round bullets to check boxes or Roman numerals to lowercase letters. You can also customize the list style or insert a picture as a bullet. If you move, insert, or delete items in a numbered list, Word sequentially renumbers the list for you.



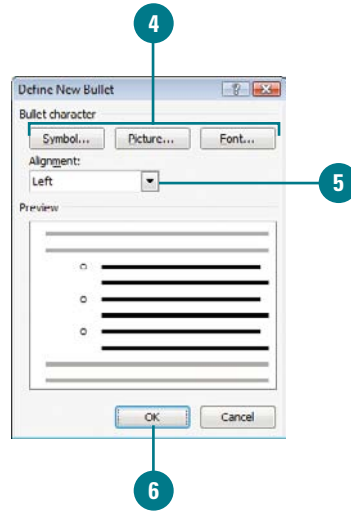
## Create a Numbered List

- 1 Click where you want to create a numbered list.
- 2 Click the **Home** tab.
- 3 Click the **Numbering** button arrow, and then select a numbering style.
- 4 Type the first item in your list, and then press Enter.
- 5 Type the next item in your list, and then press Enter.
- 6 Click the **Numbering** button, or press Enter again to end the list.



## Change Bullet or Number Styles

- 1 Select the list, and then click the Home tab.
- 2 Click the **Bullets** or **Numbering** button arrow.
- 3 Click a predefined format, or click **Define New Bullet** or **Define New Number Format**.
- 4 To add a graphic bullet, click **Symbol**, **Picture**, or **Font**, and then select the picture you want.
- 5 Specify the alignment and any other formatting you want.
- 6 Click **OK**.

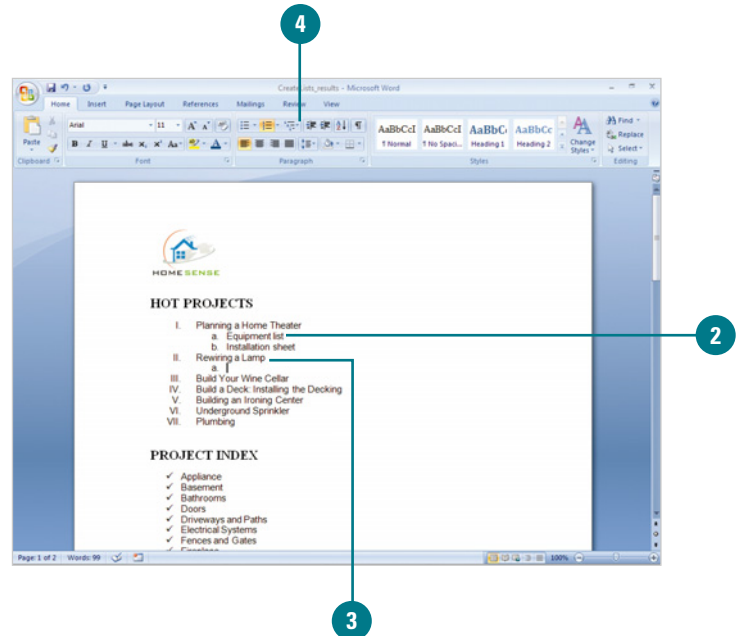


## Create a Multi-Level Bulleted or Numbered List

- 1 Start the list as usual.
- 2 Press Tab to indent a line to the next level bullet or number, type the item, and then press Enter to insert the next bullet or number.
- 3 Press Shift+Tab to return to the previous level bullet or number.
- 4 To format the multi-level list, select the list, click the **Multi-Level List** button on the Home tab, and then select a format.

### Did You Know?

*You can quickly create a numbered list.* Click to place the insertion point at the beginning of a line, type 1., press the Spacebar, type the first item, and then press Enter. Type the next line in the list or press Enter or Backspace to end the list.



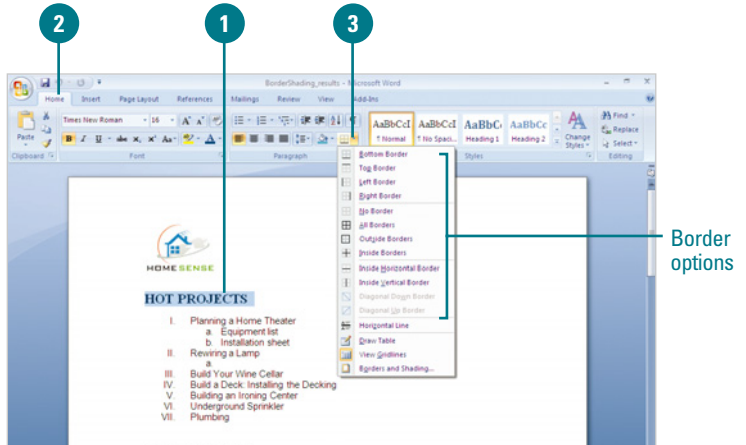
# Applying Borders and Shading



To enhance the appearance of the text in a paragraph, you can format it using the buttons in the Paragraph group on the Home tab. You can quickly add a border and shading to selected text. When you add a border, you can specify what sides you want to include or exclude. For example, you can add a border on just the top and the bottom and leave the sides open. Shading colors the background behind the selected text or paragraph. If you want to customize borders and shading by changing line style, color, and width preferences, you can make changes in the Borders and Shading dialog box.

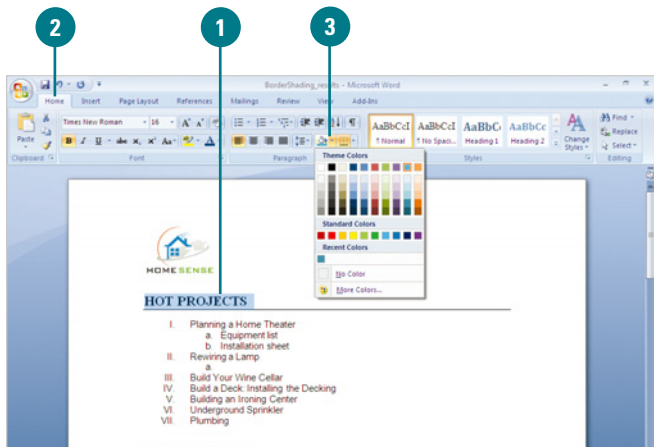
## Apply a Border

- 1 Select the paragraph text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Borders and Shading** button arrow, and then click to select the border commands to add or remove a border.



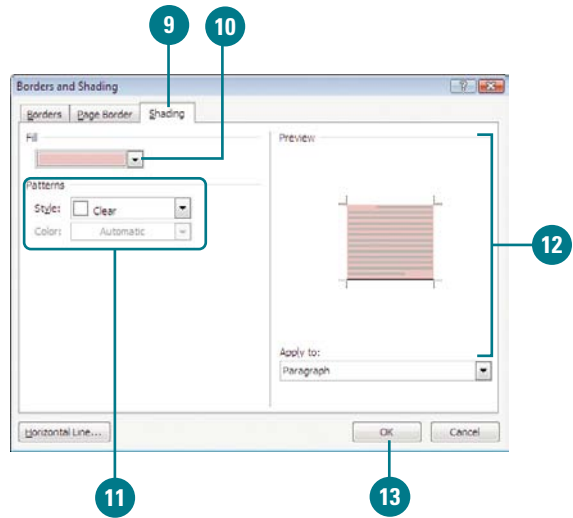
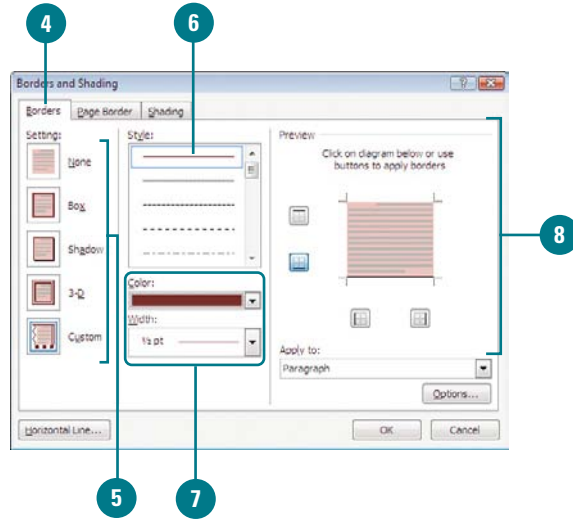
## Apply Paragraph Shading

- 1 Select the paragraph text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Shading** button arrow, and then click to select the shading color you want to apply to the selected text.



## Apply Paragraph Shading and Borders

- 1 Select the paragraph text you want to format.
- 2 Click the **Home** tab.
- 3 Click the **Borders and Shading** button arrow, and then click **Borders and Shading**.
- 4 Click the **Borders** tab.
- 5 Click to select the type of Setting you want for your border.
- 6 Click to select the type of Style.
- 7 Apply any other options you want.
- 8 Look in the preview box to see the new border.
- 9 Click the **Shading** tab.
- 10 Click to select the shading fill color you want to apply to your table.
- 11 Apply any other options you want.
- 12 Look in the preview box to see the new shading color.
- 13 Click **OK**.



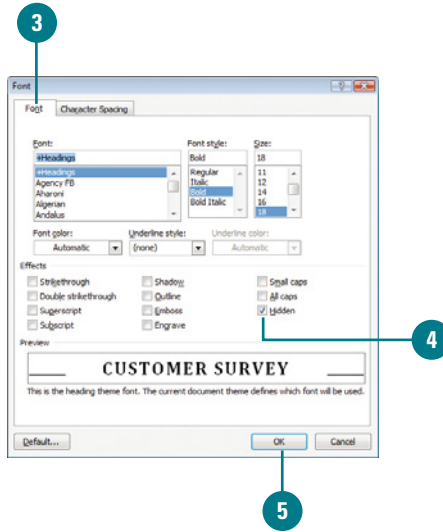
# Hiding Text



If you have confidential information in a document or text that you don't want others to see, you can hide the text. When you hide text, you can't view or print the text unless you select the Hidden Text option in the Word Options dialog box. When you display or print hidden text, the characters appear with a dotted lined underneath. Hiding text does not protect your text from being seen, but it does conceal it from others.

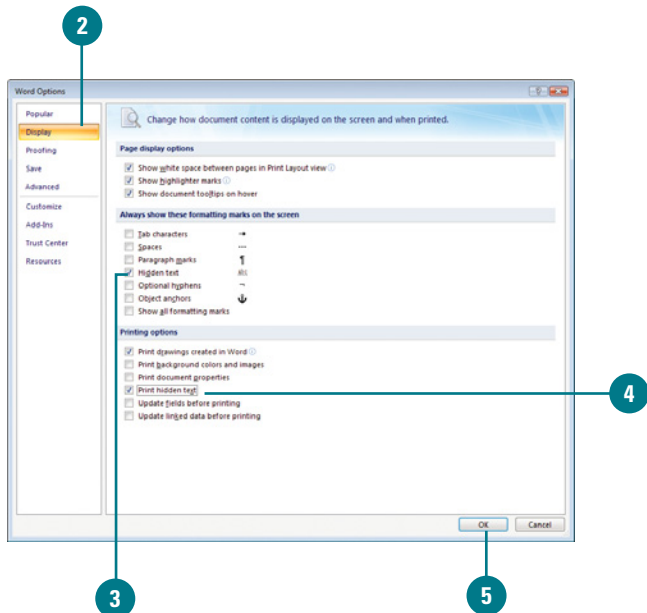
## Hide or Unhide Text

- 1 Select the text you want to hide or the hidden text.
- 2 Click the **Home** tab, and then click the **Font Dialog Box Launcher**.
- 3 Click the **Font** tab.
- 4 Select or clear the **Hidden** check box.
- 5 Click **OK**.



## Display or Print Hidden Text

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Display**.
- 3 Select the **Hidden text** check box.
- 4 Select the **Print hidden text** check box.
- 5 Click **OK**.



# Using Templates, Styles, and Themes

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## Introduction

Word documents are based on templates, which are pre-designed and preformatted files that serve as the foundation of the documents. Each template is made up of styles that have common design elements, such as coordinated fonts, sizes, and colors, as well as, page layout designs. Start with a Word template for memos, reports, fax cover pages, Web pages, and so on. Apply the existing styles for headings, titles, body text, and so forth. Then modify the template's styles, or create your own to better suit your needs. Make sure you get the look you want by adding emphasis using italics, boldface, and underline, changing text alignment, adjusting line and paragraph spacing, setting tabs and indents, or creating bulleted and numbered lists. When you're done, your document is sure to demand attention and convey your message in its appearance.

Not everyone has an eye for color, and pulling it all together can be daunting, so Office Word provides you with professionally designed themes, which you can apply to any document. A **theme** is a set of unified design elements that provides a consistent look for a document by using color themes, fonts, and effects, such as shadows, shading, and animations. By using templates, styles, and themes, you can create professional looking documents in no time.

# 4

## What You'll Do

- Create a Template
- Open a Template
- Change a Template
- Apply a Quick Style
- Change a Style Set
- Create and Modify Styles
- Manage Styles
- Reveal Formatting Styles
- Use the Format Painter
- Add Custom Colors
- Understand Themes
- View and Apply a Theme
- Create Theme Colors
- Choose Theme Fonts
- Choose Theme Effects
- Create a Custom Theme
- Choose a Custom Theme

# Creating a Template

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## Create a Template

- 1 Enter all the necessary information in a new document—including formatting and graphics.
- 2 Click the **Office** button, point to **Save As**, and then click **Word Template**.
- 3 Click the **Save as type** list arrow, and then select a template format.
  - ◆ **Word Template.** Creates a template for Office Word 2007.
  - ◆ **Word Macro-Enabled Template.** Creates a template for Office Word 2007 with macros.
  - ◆ **Word 97-2003 Template.** Creates a template for Office Word 97-2003.

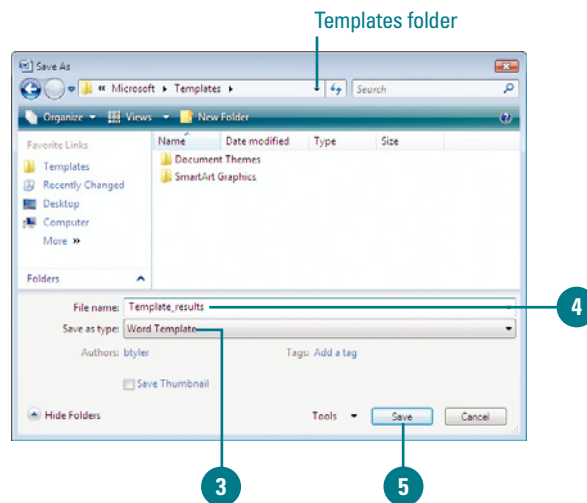
Microsoft Office templates are typically stored in the following location:

**Windows Vista.** C:/Users  
/your name/AppData/Roaming  
/Microsoft/Templates

**Windows XP.** C:/Documents and  
Settings/your name/Application  
Data/Microsoft/Templates

- 4 Type a name for your template.
- 5 Click **Save**.

You can create your own template as easily as you create a document. Like those that come with Office, custom templates can save you time. Perhaps each month you create an inventory document in which you enter repetitive information; all that changes is the actual data. By creating your own template, you can have a custom form that is ready for completion each time you take inventory. A template file saves all the customization you made to reuse in other documents. Although you can store your template anywhere you want, you may find it handy to store it in the Templates folder that Microsoft Office uses to store its templates. If you store your design templates in the Templates folder, those templates appear as options when you choose the New command on the Office menu, and then click My Templates.



# Opening a Template

## Open a Template

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **Files of type** list arrow, and then click **Templates**.
- 3 Click the **Look in** list arrow, and then select the drive and folder that contain the template you want to open.

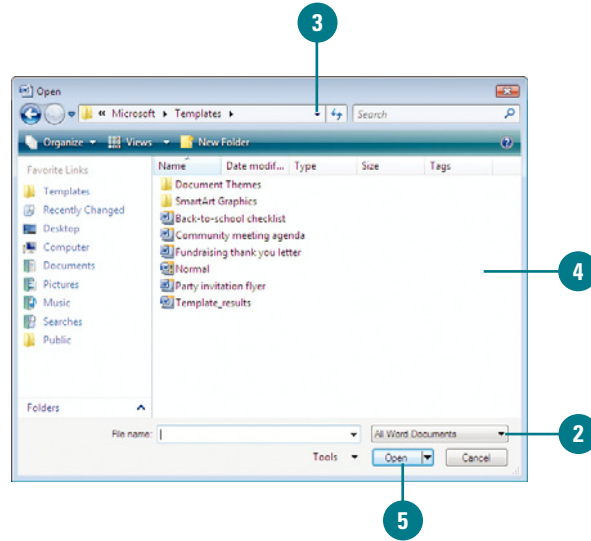
Microsoft Office templates are typically stored in the following location:

**Windows Vista.** C:/Users/  
*your name*/AppData/Roaming/  
/Microsoft/Templates

**Windows XP.** C:/Documents and  
Settings/*your name*/Application  
Data/Microsoft/Templates

- 4 Click the file name of the template you want to open.
- 5 Click **Open**.

You may not realize it, but every document you create is based on a template. When you start a new document without specifying a template, Word creates a new document based on the **default template**, called Normal. When you specify a particular template in the New dialog box, whether it's one supplied by Word or one you created yourself, Word starts a new document that contains the formatting, and any graphics and text contained in that template. The template itself does not change when you enter data in the new document, because you are working on a new file, not with the template file.



# Changing a Template

## Change an Word Template

- 1 Click the **Office** button, and then click **New**.
- 2 Open the template you want to change using the following:
  - ◆ **Microsoft Templates.** Click **Installed Templates**, click the template you want, and then click **Create**.
  - ◆ **My Templates.** Click **My Templates**, click the template you want, and then click **OK**.
- 3 Make the changes you want to the template.
- 4 Click the **Office** button, and then click **Save As**.
- 5 Click the **Save as type** list arrow, and then click **Word Template**.

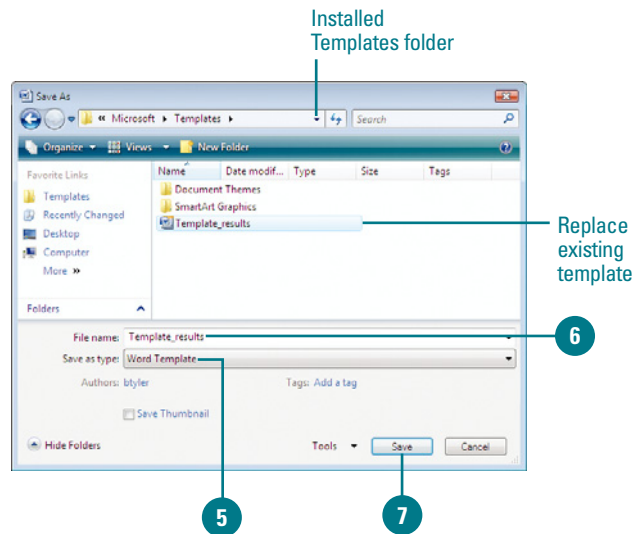
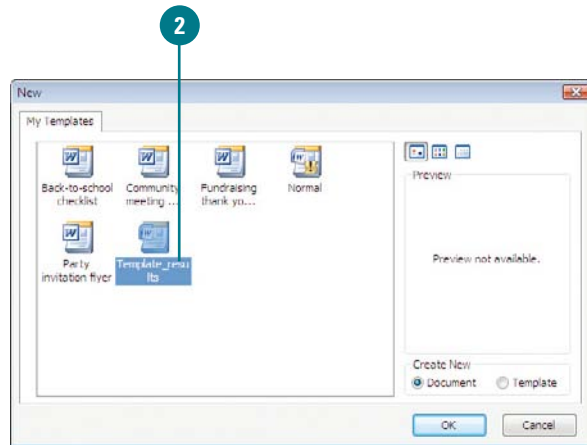
The location defaults to the folder for My Templates.

If you want to save your template with Installed Templates, then navigate to the following:

C:/Program Files/Microsoft Office/ Templates/1033/

- 6 Type a new file name or the same as the existing name to replace it.
- 7 Click **Save**, and then click **Yes**, if necessary, to replace the file.

Microsoft Word has a selection of pre-made templates designed for you to use. These templates are available in the New Document dialog box under the Installed Templates. If you like one of these templates, you can use it as the basis to create your own template. To customize one of the Microsoft Installed Templates, open the actual template, make the changes you want, and then save it. If you save the original template back in the same location with the same name as the original, you create a new default template. The original one is replaced by the newly saved template. If you don't want to change the original, save the template with a new name. You can also use the same procedure to change one of your own templates.



# Applying a Quick Style

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## Apply a Style

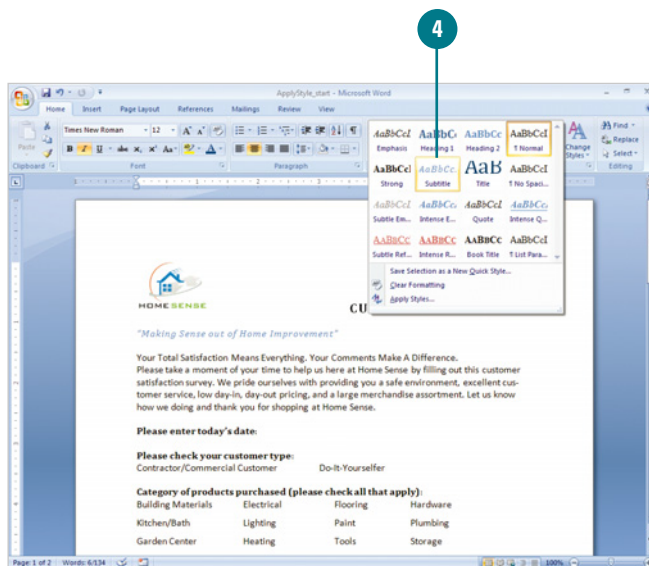
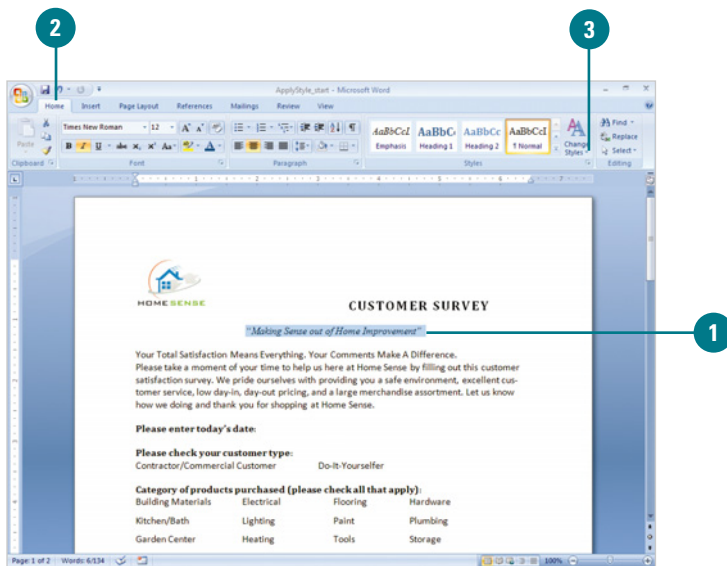
- 1 Select the text to which you want to apply a style.
- 2 Click the **Home** tab.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Quick Styles group to see additional styles.
- 4 Click the style you want to apply from the gallery.

### Did You Know?

**You can clear style formatting.** Select the text you want to clear, click the Home tab, and then click the Clear Formatting button.

**You can remove a style from the Quick Styles gallery.** Right-click the style you want to remove from the Quick Styles gallery, and then click Remove from Quick Styles gallery. The style is removed from the Quick Styles gallery. However, it remains in the Styles pane.

A **style** is a collection of formatting settings saved with a name in a document or template that you can apply to text at any time. Word provides different style sets (**New!**) to make it easy to format text. Each style set consists of a variety of different formatting style combinations, which you can view using the Quick Style gallery (**New!**). To quickly see if you like a Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected text. If you like it, click the thumbnail to apply it.



# Changing a Style Set

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## Change a Style Set

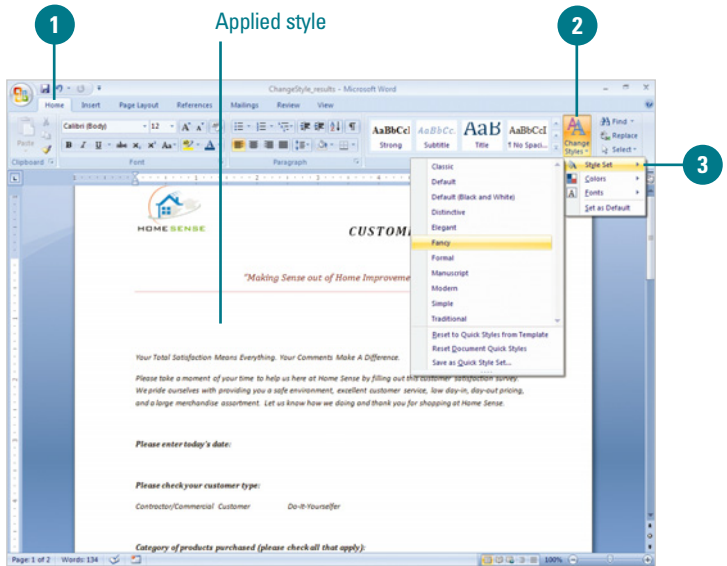
- 1 Click the **Home** tab.
- 2 Click the **Change Styles** button.
- 3 Point to **Style Set**, and then click the style set you want.

### Did You Know?

**You can reset the document back to document Quick Styles.** Click the Home tab, click the Change Styles button, point to Style Set, and then click Reset Document Quick Steps.

**You can reset the document back to document Quick Styles from a template.** Click the Home tab, click the Change Styles button, point to Style Set, click Reset to Quick Steps from Template, locate and select the template, and then click OK.

Not sure where to begin to create a fancy invitation or flyer? You can use style sets in Word to quickly format a document with a distinct style. Word provides predefined style sets (**New!**)—such as Classic, Elegant, Simple, Modern, Formal, Fancy, and Distinctive—to make it easy to format an entire document. Each style set consists of a variety of different formatting style combinations, which you can view using the Quick Style gallery.



## Create a Style Set

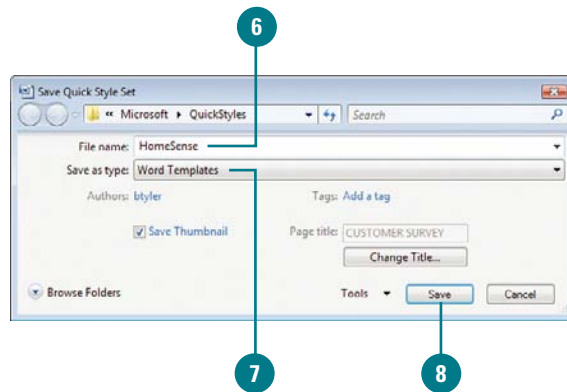
- 1 Format a document with the style that you want to save.
- 2 Click the **Home** tab.
- 3 Click the **Change Styles** button.
- 4 Point to **Style Set**.
- 5 Click **Save as Quick Style Set**.

The Save Quick Style Set dialog box opens, displaying the Quick Styles folder.

- 6 Type a file name.
- 7 If necessary, click the **Save as type** list arrow, and then click **Word Templates**.
- 8 Click **Save**.

### Did You Know?

**You can set the default style set.** Click the Home tab, click the Change Styles button, point to Style Set, and then click the style set you want to use as the default. Click the Change Styles button, and then click Set as Default.



# Creating and Modifying Styles

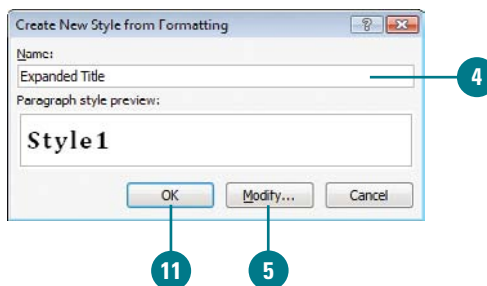
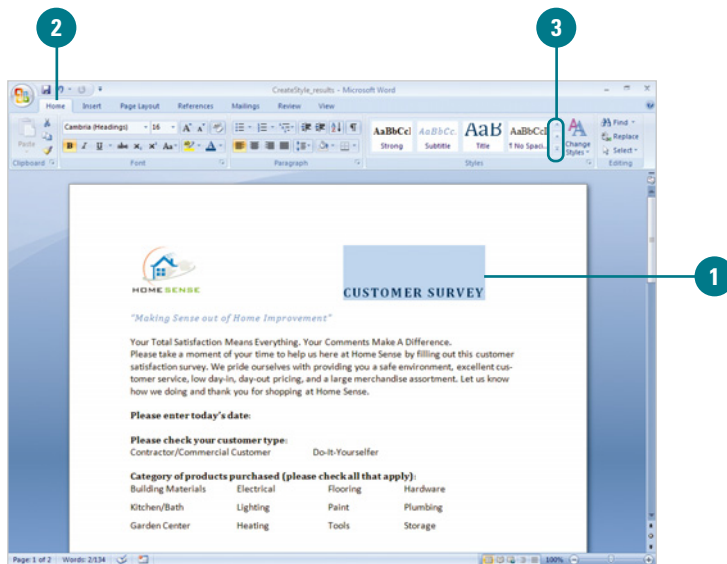
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## Create a New Style

- 1 Select the text whose formatting you want to save as a style.
- 2 Click the **Home** tab.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Styles group, and then click **Save Selection as a New Quick Style**.
- 4 Type a short, descriptive name.
- 5 Click **Modify**.
- 6 Click the **Style type** list arrow, and then click **Paragraph** to include the selected text's line spacing and margins in the style, or click **Character** to include only formatting, such as font, size, and bold, in the style.
- 7 Click the **Style for following paragraph** list arrow, and then click the name of style you want to be applied after a paragraph with the new style.
- 8 Select the formatting options you want.
- 9 To add the style to the Quick style gallery, select the **Add to Quick Style list** check box.
- 10 Click **OK**.
- 11 Click **OK**.

Word provides a variety of styles to choose from. But sometimes you need to create a new style or modify an existing one to get the exact look you want. When you create a new style, specify if it applies to paragraphs or characters, and give the style a short, descriptive name that describes its purpose so you and others recall when to use that style. A **paragraph style** is a group of format settings that can be applied only to all of the text within a paragraph (even if it is a one-line paragraph), while a **character style** is a group of format settings that is applied to any block of text at the user's discretion. To modify a style, adjust the formatting settings of an existing style.

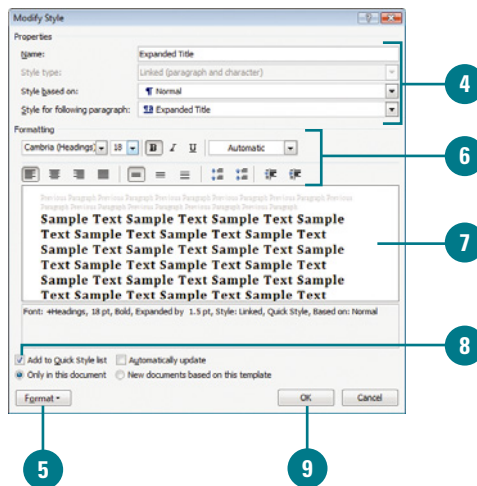
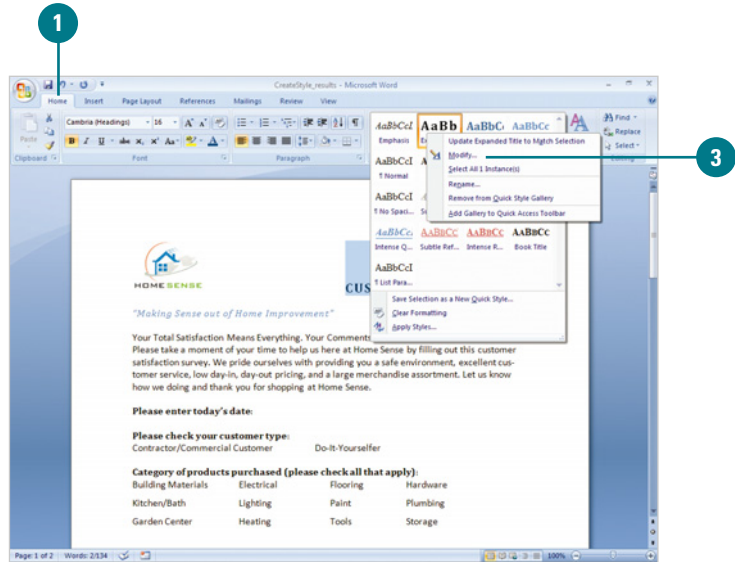


## Modify a Style

- 1 Click the **Home** tab.
- 2 Click the scroll up or down arrow, or click the **More** list arrow in the Styles group.
- 3 Right-click the style you want to modify, and then click **Modify**.
- 4 Specify any style changes (Style based on or Style for following paragraphs) you want.
- 5 Click **Format**, and then click the type of formatting you want to modify:
  - ◆ To change character formatting, such as font type and boldface, click **Font**.
  - ◆ To change line spacing and indents, click **Paragraph**.
- 6 Select the formatting options you want.
- 7 Check the Preview box, and review the style description. Make any formatting changes as needed.
- 8 To add the style to the Quick style gallery, select the **Add to Quick Style list** check box.
- 9 Click **OK**.

### Did You Know?

**You can view the list of styles.** Click the Home tab, click the More list arrow in the Styles group, click Apply Style, and then click the Styles button to display the Styles list. From the Styles list pane, you can create a new style, inspect styles, manage styles, and change style options.



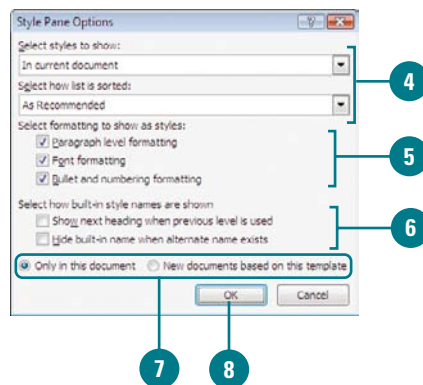
# Managing Styles



The Styles pane give you another way to work with styles. You can view a master list of individual styles, preview styles as shown in the document, disable linked styles, and manage styles. The Styles pane allows you to work with the main document styles, such as body and heading text. You can modify or delete a style, select all instances of a style, or add a style to the Quick Styles gallery. If you want to work with the more indepth styles that Word uses to create lists, comment text, footer, header, index, tables, table of contents, and other stylized elements, you can use the Manage Styles dialog box.

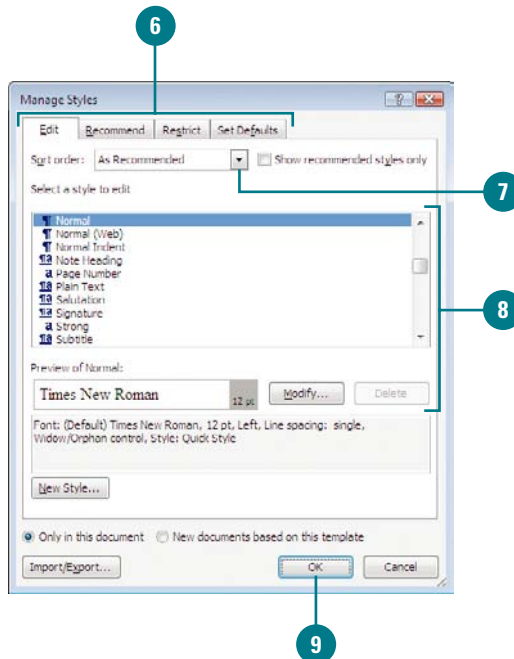
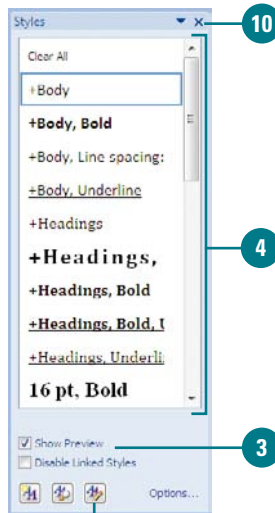
## Change Styles Pane Options

- 1 Click the **Home** tab.
- 2 Click the **Styles** Dialog Box Launcher.
- 3 Click **Options**.
- 4 Click the list arrows, and then select the styles you want to show and how the list is sorted.
- 5 Select the check boxes to show the types of formatting (paragraph, font, or bullet and numbering) you want to show in the Style pane.
- 6 Select or clear the check boxes to show or hide built-in styles in the Style pane.
- 7 Click the **Only in this document** or **New document based on this template** option.
- 8 Click **OK**.
- 9 When you're done, click the **Close** button on the task pane.



## Manage Styles

- 1 Click the **Home** tab.
- 2 Click the **Styles Dialog Box Launcher**.
- 3 To preview styles, select the **Show Preview** check box.
- 4 Use the Style pane to make the any of the following changes:
  - ◆ **Modify.** Point to the style, click the list arrow, and then click **Modify Style**.
  - ◆ **Delete.** Point to the style, click the list arrow, click **Delete**, and then click **Yes**.
  - ◆ **Select All.** Point to the style, click the list arrow, and then click **Select All x Instance(s)**.
  - ◆ **Add to Quick Style Gallery.** Point to the style, click the list arrow, and then click **Add to Quick Style Gallery**.
- 5 Click **Manage Styles**.
- 6 Click the tab with the operation you want to perform: **Edit**, **Recommend**, **Restrict**, or **Set Defaults**.
- 7 Click the **Sort order** list arrow, and then select the way you want to display the styles.
- 8 Select the style you want, and then use the options and commands to make the changes you want.
- 9 When you're done, click **OK**.
- 10 Make any additional changes, and then click the **Close** button on the task pane.



# Revealing Formatting Styles

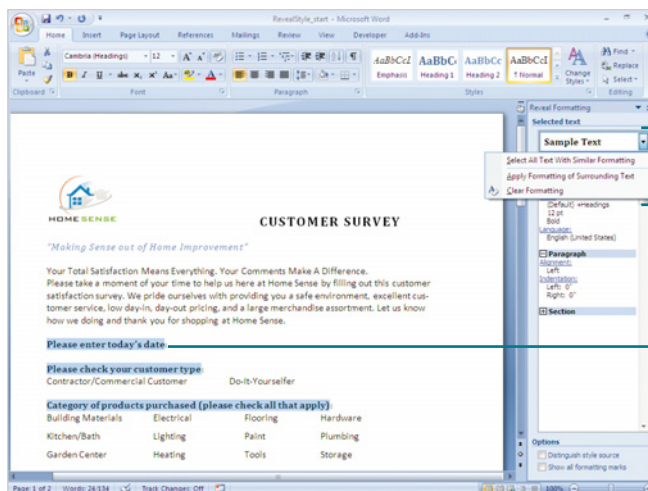
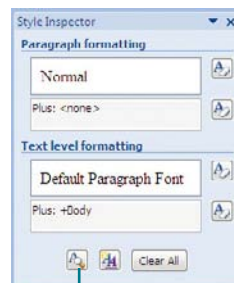
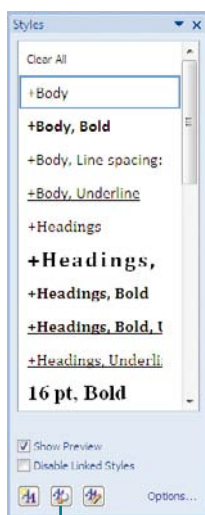
## Select or Clear Text Formatting

- 1 Select the text whose formatting you want to select or clear away.
- 2 Click the **Styles** Dialog Box Launcher.
- 3 Click the **Style Inspector** button.
- 4 Click the **Reveal Formatting** button.
  - ◆ To provide more screen space to work, you can close the Style Inspector and Styles task pane.
- 5 Select the text you want to reveal.
- 6 Point to the Selected Text box, click the list arrow, and then click either **Select All Text With Similar Formatting** or **Clear Formatting**.
  - ◆ To apply the formatting to your surrounding text, click **Apply Formatting of Surrounding Text**.
- 7 When you're done, click the **Close** button on the task pane.

## See Also

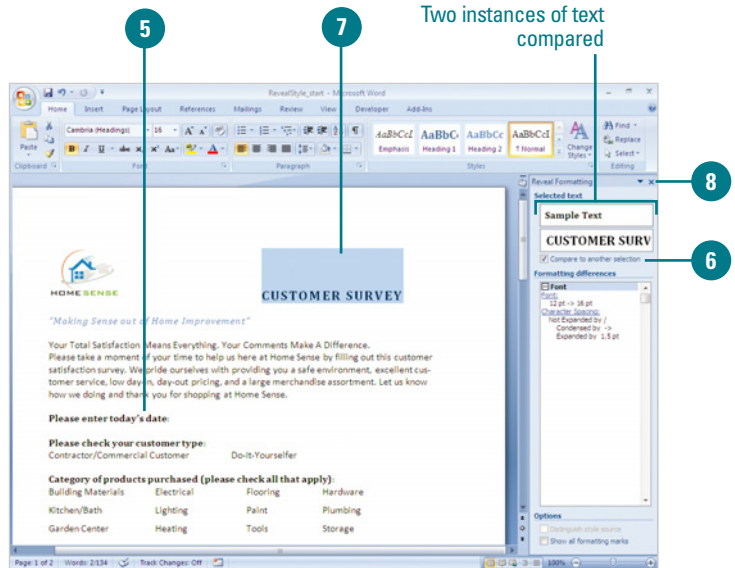
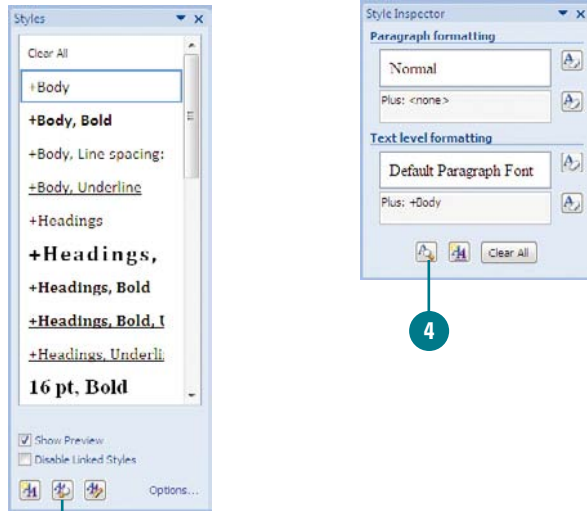
See "Selecting Text with Similar Formatting" on page 67 for information on using the Select Text with Similar Formatting command available on the Home tab.

Word uses wavy blue underlines to indicate possible instances of inconsistent formatting. If you see a wavy blue underline while formatting a document, you can open the Reveal Formatting task pane to display the format of selected text, such as its font and font effects. The Reveal Formatting task pane allows you to display, change, or clear formatting for the selected text. You can also select text based on formatting so that you can compare the formatting used in the selected text with formatting used in other parts of the documents. To open the Reveal Formatting task pane, you use the Style Inspector on the Styles pane.



## Compare Text Formatting

- 1 Select the first instance of formatting you want to compare.
- 2 Click the **Styles** Dialog Box Launcher.
- 3 Click the **Style Inspector** button.
- 4 Click the **Reveal Formatting** button.
  - ◆ To provide more screen space to work, you can close the Style Inspector and Styles task pane.
- 5 Select the first instance of formatting you want.
- 6 Select the **Compare to another selection** check box.
- 7 Select the second instance of formatting to compare.
- 8 When you're done, click the **Close** button on the task pane.



# Using the Format Painter

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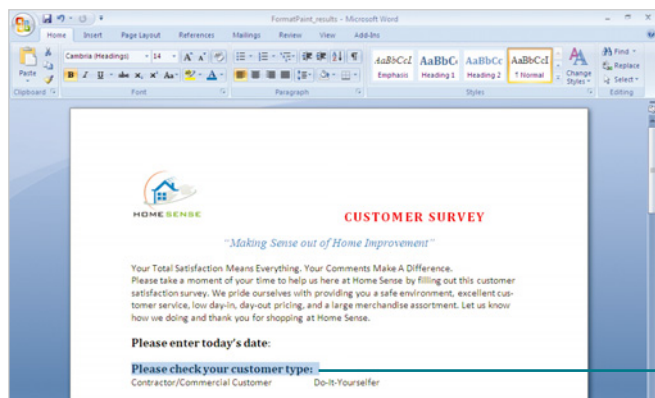
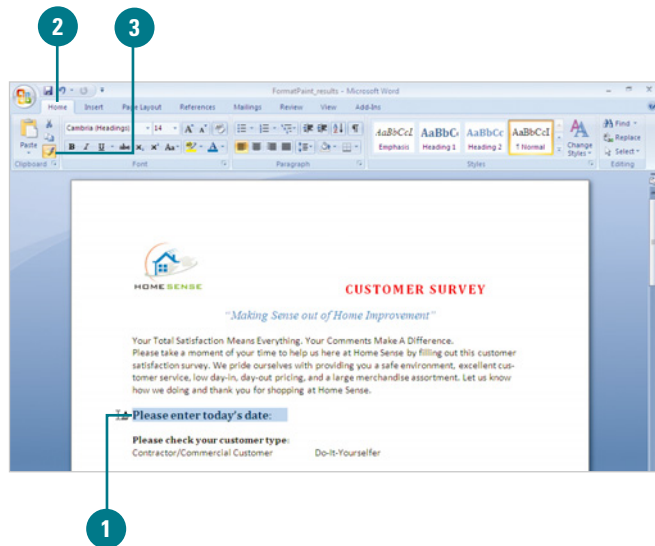
## Apply a Format Style Using the Format Painter

- 1 Select the text containing the formatting you want to copy.
  - 2 Click the **Home** tab.
  - 3 Click the **Format Painter** button.
- If you want to apply the format to more than one item, double-click the Format Painter button.
- 4 Drag to select the text or click the object to which you want to apply the format.
  - 5 If you double-clicked the Format Painter button, drag to select the text or click the object to which you want to apply the format, and then press Esc when you're done.

### Did You Know?

*You can use the Esc key to cancel format painting.* If you change your mind about painting a format, cancel the marquee by pressing Esc.

After formatting text in a document, you might want to apply those same formatting changes to other areas in the document. For example, redoing the same formatting, you can **paint** (that is, copy) the formatting from area to others. The Format Painter lets you “pick up” the style of one section and apply, or “paint,” it to another. To apply a format style to more than one item, double-click the Format Painter button on the Home tab instead of a single-click. The double-click keeps the Format Painter active until you want to press Esc to disable it, so you can apply formatting styles to any text or object you want in your document.



# Adding Custom Colors

## Add a Color to the Menus

- 1 Click the **Font Color** button on the Home tab, and then click **More Colors**.

This is one method. You can also use other color menus to access the Colors dialog box.

- 2 Click the **Custom** tab.
- 3 Click the **Color Model** list arrow, and then click **RGB** or **HSL**.
- 4 Select a custom color using one of the following methods:

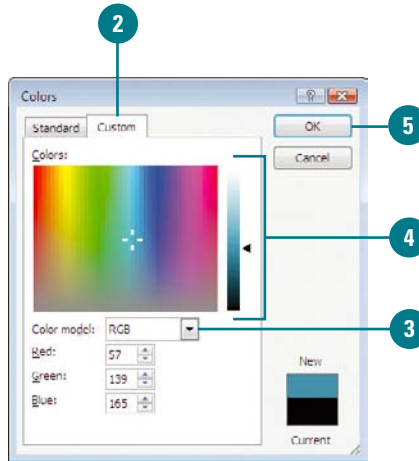
- ◆ If you know the color values, enter them, either Hue, Sat, Lum, or Red, Green, and Blue.
- ◆ Drag across the palette until the pointer is over the color you want. Drag the black arrow to adjust the amount of black and white in the color.

The new color appears above the current color at the bottom right.

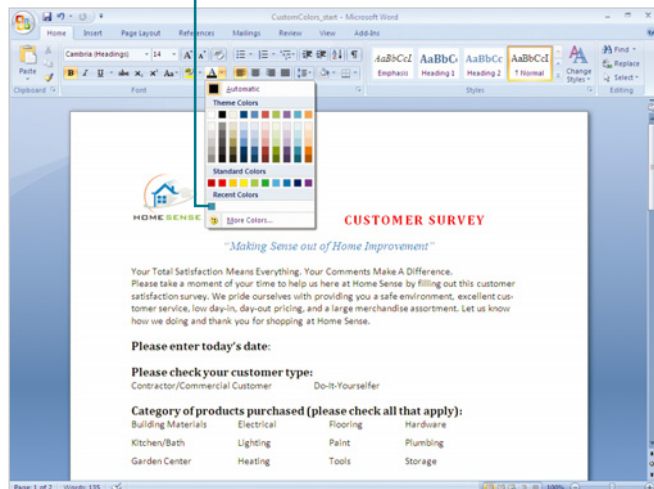
- 5 Click **OK**.

The current selection is changed to the new color, plus the new color is added to the Recent Colors section of all document color menus.

In addition to the standard and theme colors (**New!**), Word allows you to add more colors to your document. These additional colors are available on each color button palette on the Ribbon or in a dialog box, such as the Fill Color or Font Color button. These colors are useful when you want to use a specific color, but the document color theme does not have that color. Colors that you add to a document appear in all color palettes and remain in the palette even if the color theme changes.



Added custom color



# Understanding Themes

A theme helps you create professional-looking documents that use an appropriate balance of color for your document content. You can use a default color theme (**New!**) or create a custom one.

Themes in Office are made up of a palette of twelve colors (**New!**). These colors appear on color palettes when you click a color-related button, such as Fill Color or Font Color button on the Home tab or in a dialog box. These twelve colors correspond to the following elements in a document:

**Four Text and Background.** The two background colors (light and dark combinations) are the canvas, or drawing area, color of the document. The two text colors (light and dark combinations) are for typing text and drawing lines, and contrast with the background colors.

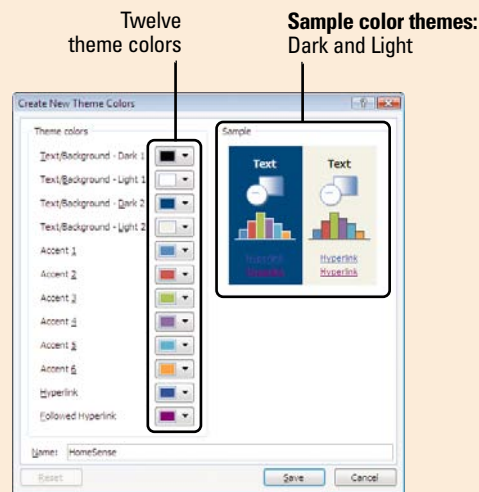
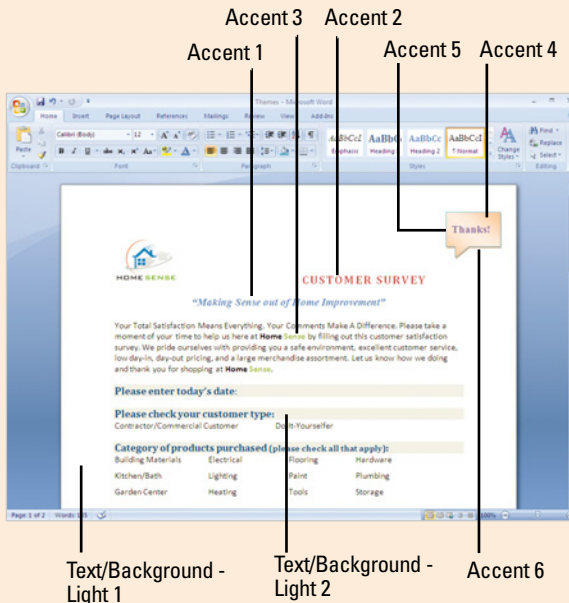
**Six Accent.** These colors are designed to work as a complementary color palette for

objects, such as shadows and fills. These colors contrast with both the background and text colors.

**One hyperlink.** This color is designed to work as a complementary color for objects and hyperlinks.

**One followed hyperlink.** This color is designed to work as a complementary color for objects and visited hyperlinks.

The first four colors in the Theme Colors list represent the document text and background colors (light and dark for each). The remaining colors represent the six accent and two hyperlink colors for the theme. When you apply another theme or change any of these colors to create a new theme, the colors shown in the Theme Colors dialog box and color palettes change to match the current colors.



# Viewing and Applying a Theme

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## View and Apply a Theme

- 1 Open the document you want to apply a theme.
- 2 Click the **Page Layout** tab.
- 3 Click the **Themes** button to display the themes gallery.
- 4 Point to a theme.

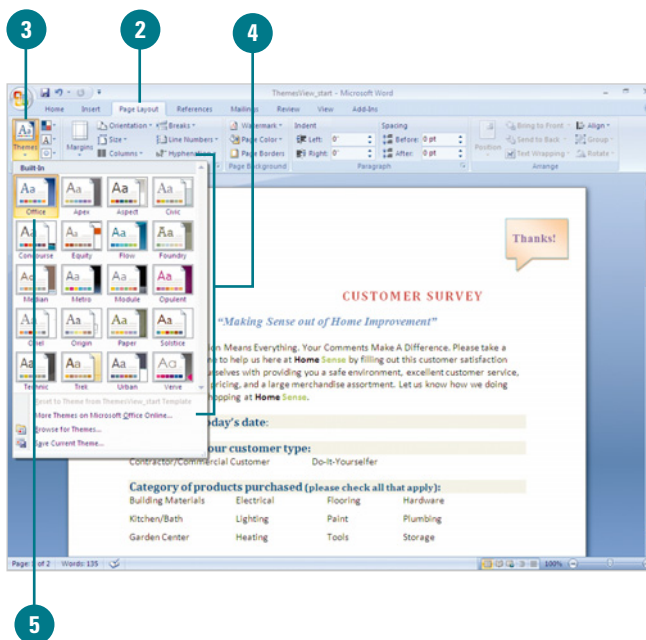
A live preview (**New!**) of the theme appears in the document, along with a ScreenTip.

- 5 Click the theme you want to apply to the active document.

### Did You Know?

*You can search for themes at **Microsoft Office Online**. Click the Page Layout tab, click the Themes button, and then click More Themes on Microsoft Office Online. Follow Microsoft Office Online Web site instructions to download and use online themes.*

A document theme (**New!**) consists of theme colors, fonts, and effects. You can quickly format an entire document with a professional look by applying a theme. To quickly see if you like a theme, point to one on the themes gallery to display a ScreenTip with name and information about it, and a live preview (**New!**) of it on the current document. If you like the theme, you can apply it. When you apply a theme, the background, text, graphics, charts, and tables all change to reflect the theme. You can choose from one or more standard themes. When you add new content, the document elements change to match the theme ensuring all of your material will look consistent. You can even use the same theme in other Microsoft Office 2007 programs, such as Excel and PowerPoint, so all your work matches. Can't find a theme you like? Search Microsoft Office Online.



# Creating Theme Colors

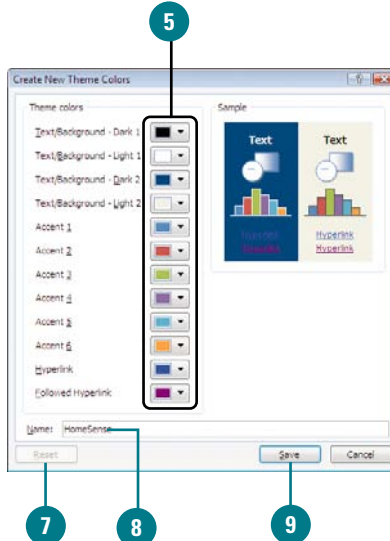
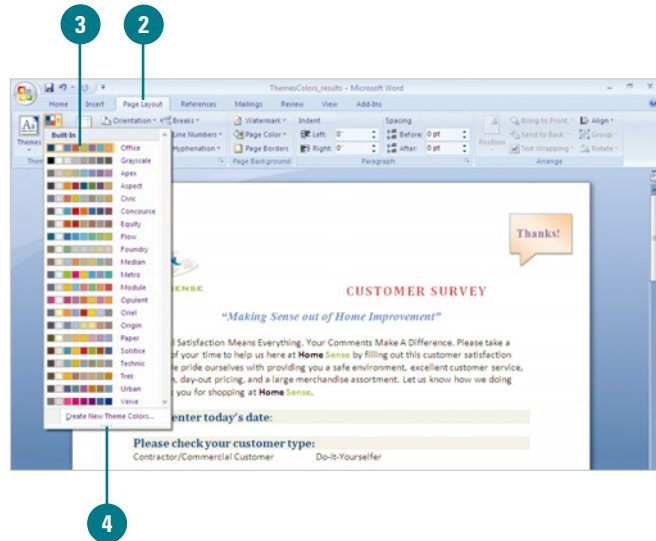
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## Apply or Create Theme Colors

- 1 Open the document you want to apply a color theme.
- 2 Click the **Page Layout** tab.
- 3 To apply theme colors to a document, click the **Theme Colors** button, and then click a color theme.
  - ◆ To apply individual theme colors, select the element, click a color button, such as Font Color on the Home tab, and then click a theme color.
- 4 To create theme colors, click the **Theme Colors** button, and then click **Create New Theme Colors**.
- 5 Click the **Theme Colors** button arrows (Text/Background, Accent, or Hyperlink, etc.) for the colors you want to change.
- 6 Click a new color, or click **More Colors** to select a color from the **Standard** or **Custom** tab, and then click **OK**.
- 7 If you don't like your color choices, click the **Reset** button to return all color changes to their original colors.
- 8 Type a new name for the color theme.
- 9 Click **Save**.

You may like a certain color theme except for one or two colors. You can change an existing color theme (**New!**) and apply your changes to the entire document. You can add other custom colors to your theme by using RGB (Red, Green, and Blue) or HSL (Hues, Saturation, and Luminosity) color modes. The RGB color mode is probably the most widely used of all the color modes. You can accomplish this by using sliders, dragging on a color-space, or entering a numeric value that corresponds to a specific color. Once you create this new color theme, you can add it to your collection of color themes so that you can make it available to any document.



## Select Custom Colors

1 Select the text you want to apply a custom color.

2 Click the **Font Color** button on the Home tab, and then click **More Colors**.

This is one method. You can also use other color menus to access the Colors dialog box.

3 Click the **Custom** tab.

4 Click the **Color Model** list arrow, and then click **RGB** or **HSL**.

5 Select a custom color using one of the following methods:

- ◆ If you know the color values, enter them, either Hue, Sat, Lum, or Red, Green, and Blue.
- ◆ Drag across the palette until the pointer is over the color you want. Drag the black arrow to adjust the amount of black and white in the color.

The new color appears above the current color at the bottom right.

6 Click **OK**.

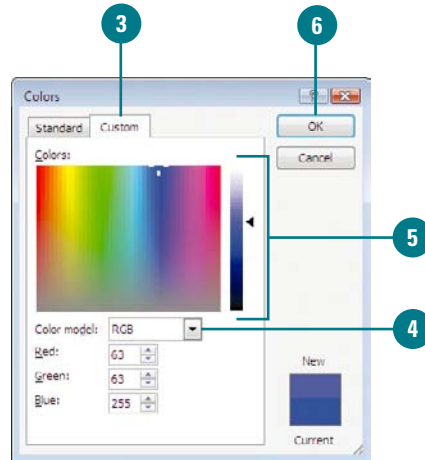
### Did You Know?

#### **You can edit a custom color theme.**

On the Page Layout tab, click the Theme Colors button, right-click the theme color you want to edit, click Edit, make changes, and then click Save.

#### **You can delete a custom color theme.**

On the Page Layout tab, click the Theme Colors button, right-click the theme color you want to edit, click Edit, click Delete, and then click Yes.



## The Properties of Color

Characteristic	Description
Hue	The color itself; every color is identified by a number, determined by the number of colors available on your monitor.
Saturation	The intensity of the color. The higher the number, the more vivid the color.
Luminosity	The brightness of the color, or how close the color is to black or white. The larger the number, the lighter the color.
Red, Green, Blue	Primary colors of the visible light spectrum. RGB generates color using three 8-bit channels: 1 red, 1 green, and 1 blue. RGB is an additive color system, which means that color is added to a black background. The additive process mixes various amounts of red, green and blue light to produce other colors.

# Choosing Theme Fonts

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## Apply and Choose Theme Fonts

- 1 Open the document you want to apply theme fonts.
- 2 Click the **Home** tab.
- 3 Select the text you want to change, click the **Font** list arrow, and then click the theme font you want.

**TIMESAVER** To select the entire document, press **Ctrl+A**.

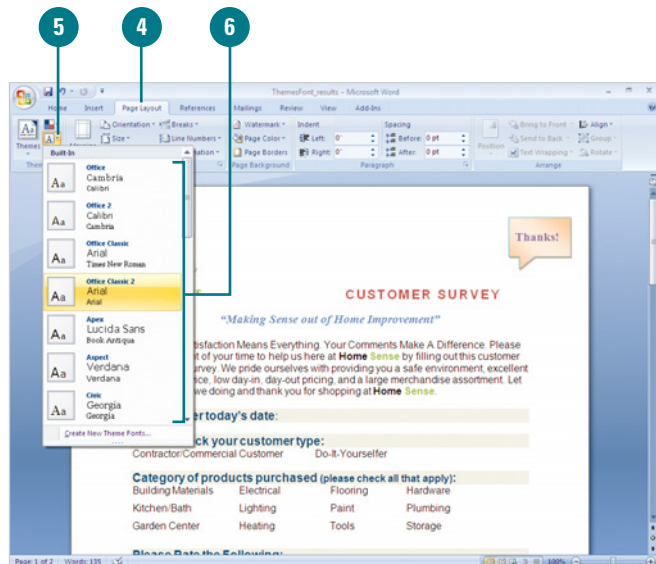
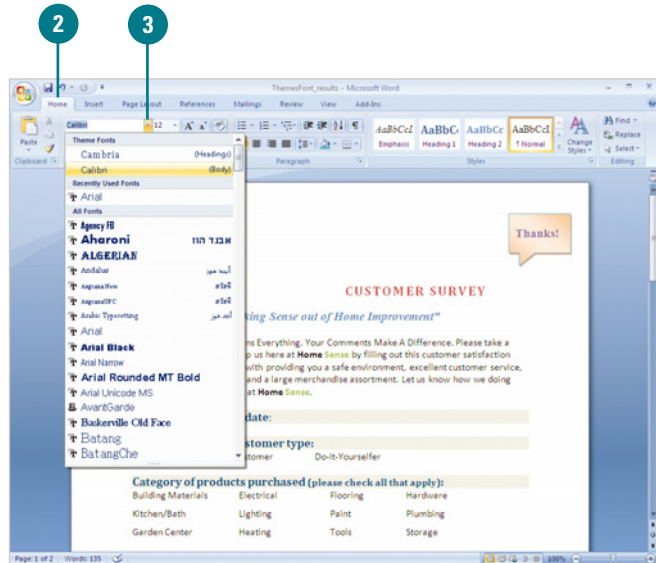
- 4 Click the **Page Layout** or **Design** tab.
- 5 Click the **Theme Fonts** button.

The current theme fonts appear highlighted in the menu.

**TIMESAVER** Point to the **Fonts** button to display a **ScreenTip** with the current theme fonts.

- 6 Click the theme fonts you want from the gallery menu.

A document theme consists of theme colors, fonts, and effects. Theme fonts (**New!**) include heading and body text fonts. Each document uses a set of theme fonts. When you click the Theme Fonts button on the Page Layout tab, the name of the current heading and body text font appear highlighted in the gallery menu. To quickly see if you like a theme font, point to one on the menu, and a live preview (**New!**) of it appears on the current document. If you want to apply the theme, click it on the menu. You can apply a set of theme fonts to another theme or create your own set of theme fonts.



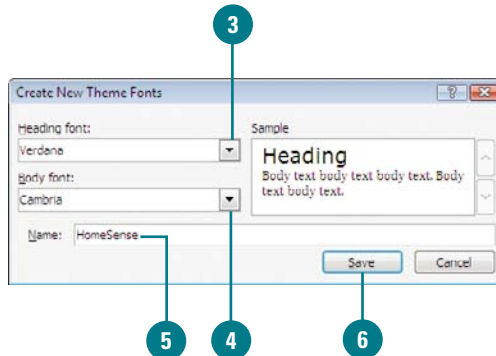
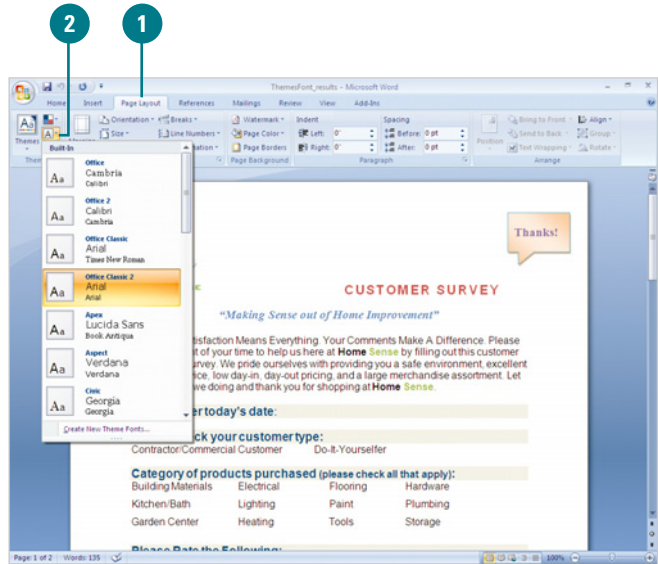
## Create Theme Fonts

- 1 Click the **Page Layout** tab.
- 2 Click the **Theme Fonts** button, and then click **Create New Theme Fonts**.
- 3 Click the **Heading font** list arrow, and then select a font.
- 4 Click the **Body font** list arrow, and then select a font.
- 5 Type a name for the custom theme fonts.
- 6 Click **Save**.

### Did You Know?

*The Font Color button on the Ribbon displays the last font color you used.*

To apply this color to another selection, simply click the button, not the list arrow.



# Choosing Theme Effects

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## View and Apply Theme Effects

- 1 Open the document you want to apply a theme effect.
- 2 Click the **Page Layout** tab.
- 3 Click the **Theme Effects** button.

The current theme effects appear highlighted in the menu.

**TIMESAVER** Point to the **Effects** button to display a **ScreenTip** with the current theme effects name.

- 4 Click the theme effects you want from the menu.

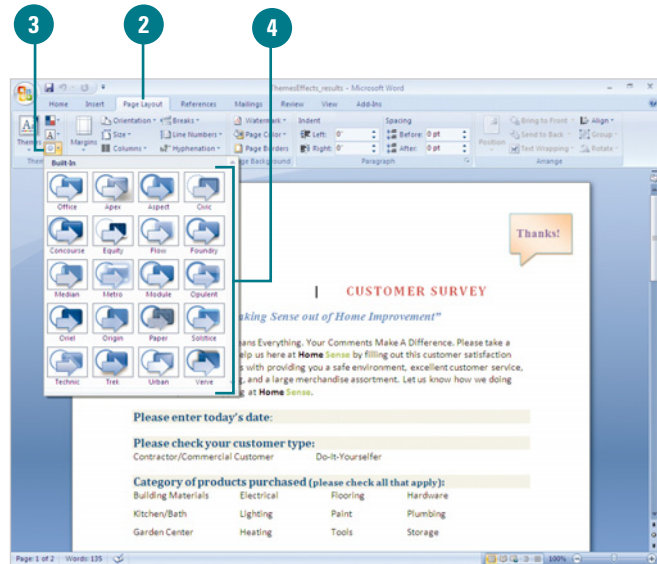
### Did You Know?

**You can delete a custom theme effects or fonts.** On the Page Layout or Design tab, click the Theme Effects or Theme Fonts button, right-click the theme you want to edit, click Edit, click Delete, and then click Yes.

### See Also

See "Viewing and Applying a Theme" on page 99 for information on applying a theme from the Themes gallery.

Theme effects (**New!**) are sets of lines, fills, and special effects styles for shapes, graphics, charts, SmartArt, and other design elements. By combining the lines, fills, and special effects styles with different formatting levels (subtle, moderate, and intense), Office Word provides a variety of visual theme effects. Each document uses a set of theme effects. Some are more basic while others are more elaborate. When you click the Theme Effects button on the Page Layout tab, the name of the current theme effects appears highlighted in the gallery menu. While you can apply a set of theme effects to another theme, you cannot create your own set of theme effects at this time.



# Creating a Custom Theme

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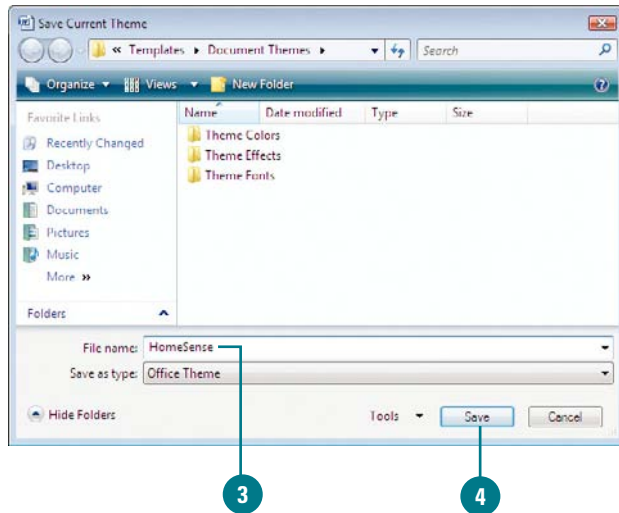
## Create a Custom Theme

- 1 Click the **Page Layout** tab, and then create a theme by customizing theme colors, theme fonts, and theme effects.
- 2 Click the **Themes** button, and then click **Save Current Theme**.
- 3 Type a name for the theme file.
- 4 Click **Save**.

### Did You Know?

*You can remove a custom theme from the gallery menu.* Simply move or delete the theme file from the Document Themes folder into another folder.

If you have special needs for specific colors, fonts, and effects, such as a company sales or marketing document, you can create your own theme by customizing theme colors, theme fonts, and theme effects, and saving them as a theme file (.thmx) (**New!**), which you can reuse. You can apply the saved theme to other documents. When you save a custom theme, the file is automatically saved in the Document Themes folder and added to the list of custom themes used by Word 2007 and other Office 2007 programs. When you no longer need a custom theme, you can delete it.



# Choosing a Custom Theme

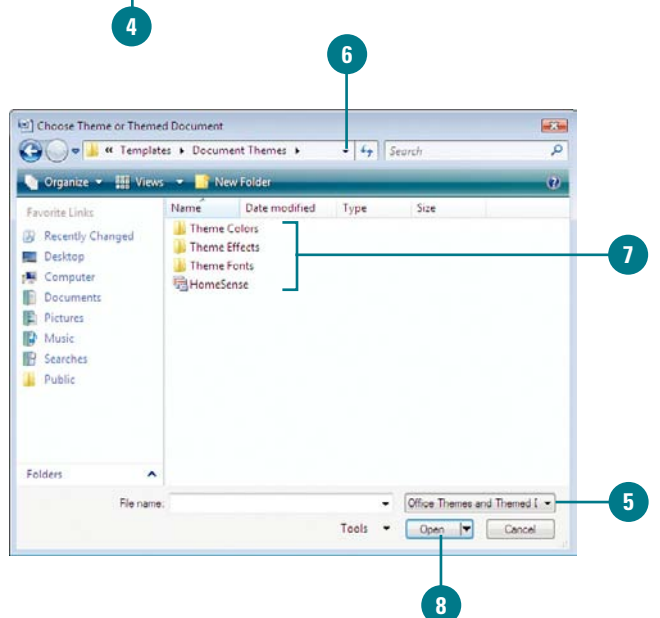
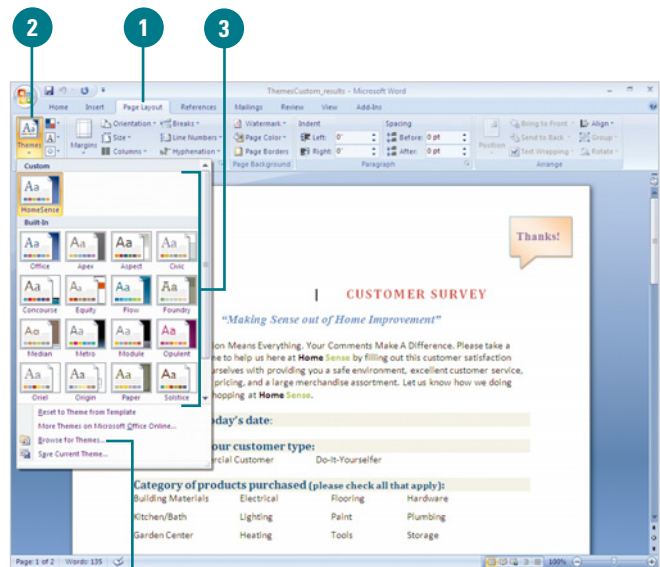
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## Choose and Apply a Custom Theme

- 1 Click the **Page Layout** tab.
- 2 Click the **Themes** button to see additional themes.
- 3 Point to the gallery you want to display the theme name, and then click the one you want.
- 4 To select and apply a custom theme from a file, click the **Themes** button, and then click **Browse for Themes**.
- 5 If you want to open a specific file type, click the **Files of type** list type, and then select an Office Theme file type:
  - ◆ **Office Themes and Themed Documents.**
  - ◆ **Office Themes.**
- 6 If the file is located in another folder, click the **Look in** list arrow, and then navigate to the file.
- 7 Click the theme file you want.
- 8 Click **Open**.

When you create your own theme by customizing theme colors, theme fonts, and theme effects, and saving them as a theme file (.thmx) (**New!**), you can apply the saved theme to other documents. When you save a custom theme file in the Document Themes folder, you can choose the custom theme from the Themes gallery. If you save a custom theme file in another folder location, you can use the Browse for Themes command to locate and select the custom theme file you want to reuse.



# Adding Graphics and Multimedia to Documents

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# 5

## Introduction

Although well-illustrated documents can't make up for a lack of content, you can capture the attention of your audience if your documents are vibrant and visually interesting. Microsoft Office comes with a vast array of clip art, and there are endless amounts available through other software packages or on the Web. When going online to look at clips, you can categorize them so that it's easier to find the best choice for your document. You can use the Microsoft Online Web site to search for and download additional clip art.

You can easily enhance a document by adding a picture—one of your own or one of the hundreds that come with Microsoft Office. If you need to modify your pictures, you can resize them, compress them for storage, change their brightness or contrast, recolor them, or crop them.

WordArt is another feature that adds detail to your document. Available in other Office programs, WordArt can bring together your documents—you can change its color, shape, shadow, or size. Because WordArt comes with so many style choices, time spent customizing your documents is minimal.

In Office programs, you can insert SmartArt graphics (**New!**) to create diagrams that convey processes or relationships. Office provides a wide-variety of built-in SmartArt graphic types from which to choose, including graphical lists, process, cycle, hierarchy, relationship, matrix, and pyramid. Using built-in SmartArt graphics makes it easy to create and modify charts without having to create them from scratch.

## What You'll Do

**Locate and Insert Clip Art**

**Insert a Picture**

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**Recolor a Picture**

**Crop and Rotate a Picture**

**Create and Format WordArt Text**

**Apply and Modify WordArt Text Effects**

**Create and Format SmartArt Graphics**

**Use the Text Pane with SmartArt Graphics**

**Modify a SmartArt Graphic**

**Create and Modify an Organization Chart**

# Locating and Inserting Clip Art

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## Locate and Insert Clip Art

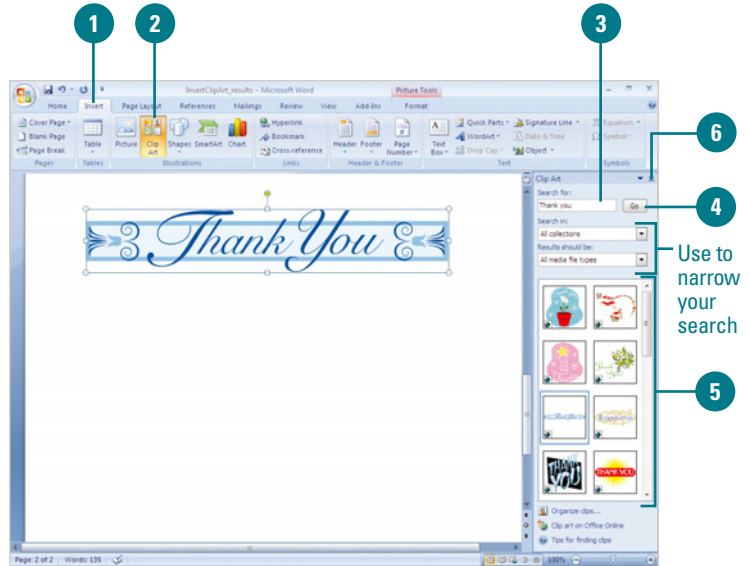
- 1 Click the **Insert** tab.
- 2 Click the **Clip Art** button.
- 3 Type the keyword(s) associated with the clip you are looking for.

To narrow your search, do one of the following:

- ◆ To limit search results to a specific collection of clip art, click the **Search In** list arrow, and then select the collections you want to search.
- ◆ To limit search results to a specific type of media file, click the **Results Should Be** list arrow, and then select the check box next to the types of clips you want to find.
- ◆ To access clip art on Office Online, click the link at the bottom of the Clip Art task pane. Search and download images from the Office Online Web site.

- 4 Click **Go**.  
Clips matching the keywords appear in the Results list.
- 5 Click the clip you want, and then resize it, if necessary.
- 6 Click the **Close** button on the task pane.

To add a clip art image to a document, you can click the Insert Clip Art button on the Insert tab to open the Clip Art task pane. The Clip Art task pane helps you search for clip art and access the clip art available in the Clip Organizer and on Office Online, a clip gallery that Microsoft maintains on its Web site. You can limit search results to a specific collection of clip art or a specific type of media file. After you find the clip art you want, you can click it to insert it, or point to it to display a list arrow. Then click an available command, such as Insert, Find Similar Style, Edit Keywords, and Delete from Clip Organizer.



## For Your Information

### Understanding Clip Art Objects

Clip art objects (pictures and animated pictures) are images made up of geometric shapes, such as lines, curves, circles, squares, and so on. These images, known as vector images, are mathematically defined, which makes them easy to resize and manipulate. A picture in the Microsoft Windows Metafile (.wmf) file format is an example of a vector image. Clip Gallery also includes sounds or motion clips, which you can insert into a document. A **motion clip** is an animated picture—also known as an animated GIF—frequently used in Web pages. When you insert a sound, a small icon appears representing the sound file.

# Inserting a Picture

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## Insert a Picture from a File

- 1 Click the **Insert** tab.
- 2 Click the **Picture** button.
- 3 Click the **Look in** list arrow, and then select the drive and folder that contain the file you want to insert.
- 4 Click the file you want to insert.
- 5 Click **Insert**.
  - ◆ To link a picture file, click the **Insert** button arrow, and then click **Link to File**.
  - ◆ To insert and link a picture file, click the **Insert** button arrow, and then click **Insert and Link**.

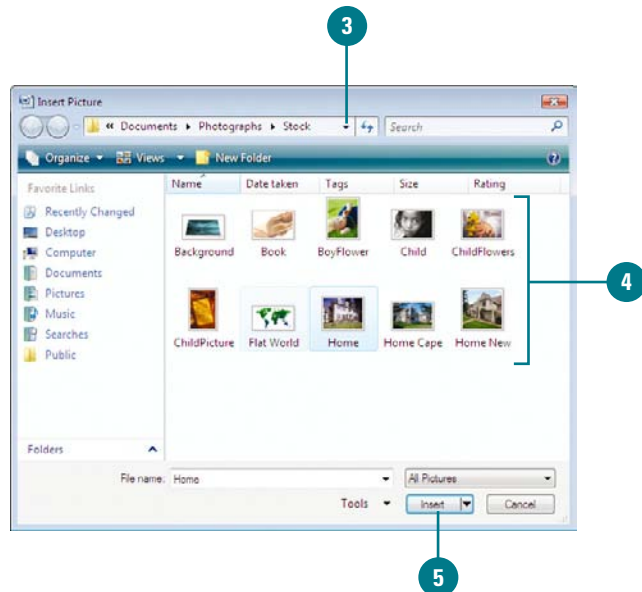
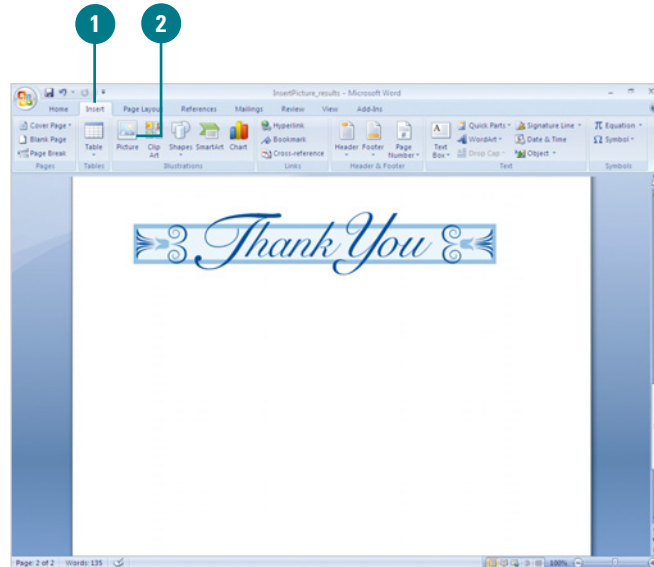
**TROUBLE?** If you see a red “x” instead of a picture or motion clip in your document, then you don’t have a graphics filter installed on your computer for that clip.

### Did You Know?

**You can change a picture.** Select the picture, click the Change Picture button on the Format tab, select another picture, and then click Insert.

**You can add graphic formats.** If the graphic format you want to insert is not in the list, you can use Office Setup’s Add or Remove Features option to install additional graphic formats.

Word makes it possible for you to insert pictures, graphics, scanned photographs, art, photos, or artwork from a CD-ROM or other program into a document. When you use the Picture button on the Insert tab, you specify the source of the picture. When you insert pictures from files on your hard disk drive, scanner, digital camera, or Web camera, Word allows you to select multiple pictures, view thumbnails of them, and insert them all at once, which speeds up the process.



# Adding a Quick Style to a Picture

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## Add a Quick Style to a Picture

- 1 Click the picture you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Picture Styles group to see additional styles.

The current style appears highlighted in the gallery.

- 4 Point to a style.  
A live preview (**New!**) of the style appears in the current shape.
- 5 Click the style you want from the gallery to apply it to the selected picture.

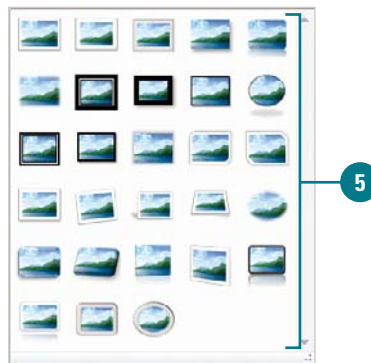
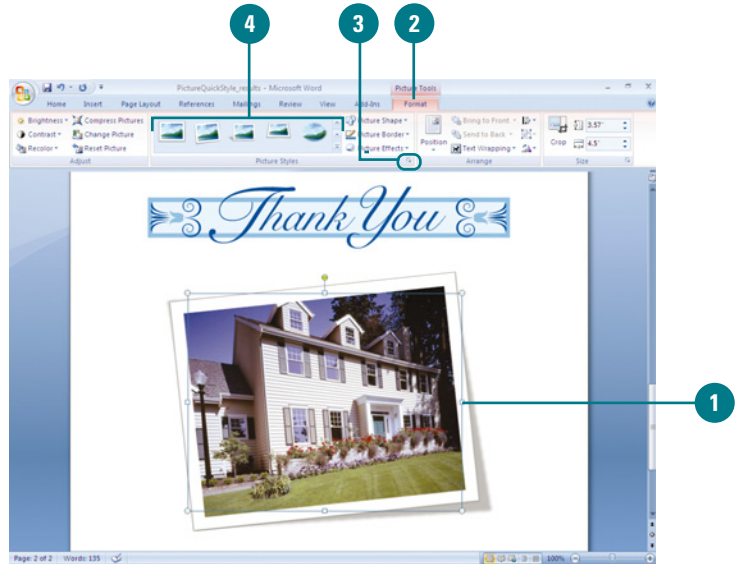
### Did You Know?

**You can quickly return a picture back to its original form.** Select the picture, click the Format tab, and then click the Reset Picture button.

### See Also

See “Applying Picture Effect” on page 113 for information on adding more effects to a picture.

Instead of changing individual attributes of a picture—such as shape, border, and effects—you can quickly add them all at once with the Picture Quick Style gallery. The Picture Quick Style gallery (**New!**) provides a variety of different formatting combinations. To quickly see if you like a Picture Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected shape. If you like it, you can select the one you want to apply it.



# Applying a Shape to a Picture

## Apply a Shape to a Picture

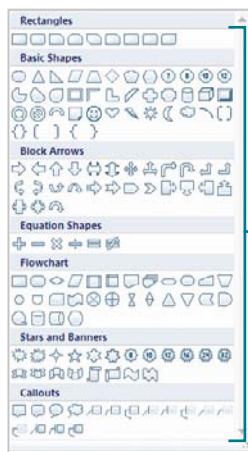
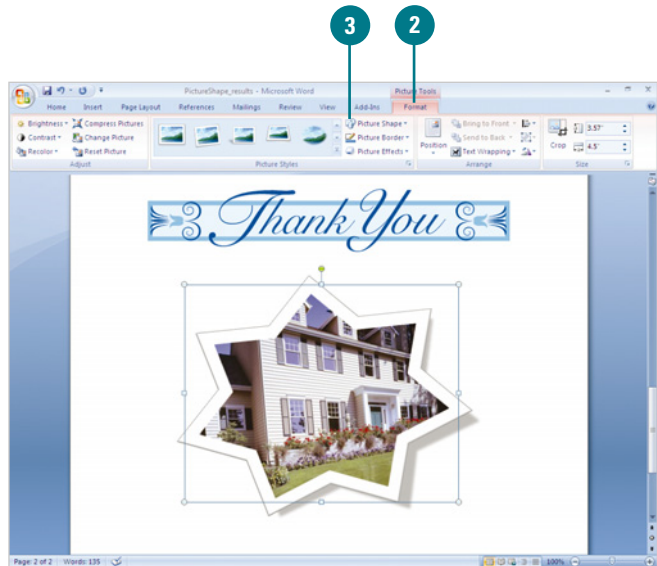
- 1 Click the picture you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Picture Shape** button.
- 4 Select the shape you want to apply to the selected picture.

### Did You Know?

**You can save a shape as a picture in the PNG format.** Right-click the shape, click Save as Picture, type a name, and then click Save.

**You can copy the window or screen contents.** To make a copy of the active window, press Alt+Print Scrn. To copy the entire screen as it appears on your monitor, press Print Scrn.

After you insert a picture into your document, you can select it and apply one of Office's shapes to it (**New!**). The picture appears in the shape just like it has been cropped. The Picture Shape gallery makes it easy to choose the shape you want to use. Live preview is not available with the Picture Shape gallery. You can try different shapes to find the one you want. If you don't find the one you want, you can use the Reset Picture button to return the picture back to its original state.



# Applying a Border to a Picture

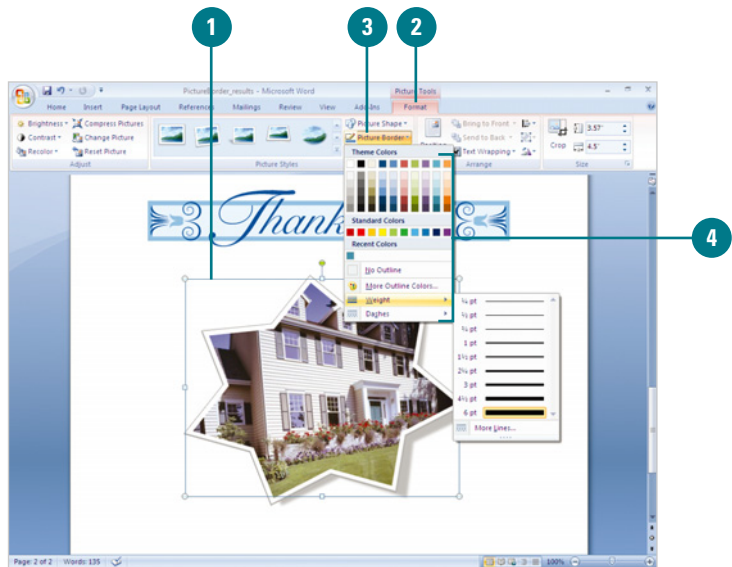
## Apply a Border to a Picture

- 1 Click the picture you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Picture Border** button.
- 4 Click a color, or point to **Weight**, or **Dashes**, and then select a style, or click **More Lines** to select multiple options.
- 5 Drag a sizing handle to change the size or angle of the line or arrow.

### Did You Know?

**You can remove a border.** Select the picture, click the Format tab, click the Picture Border button, and then click No Outline.

After you insert a picture, you can add and modify the picture border by changing individual outline formatting using the Picture Border button on the Format tab under Picture Tools. The Picture Border button works just like the Shape Outline button and provides similar options to add a border, select a border color, and change border width and style. You can try different border combinations to find the one you want. If you don't find one that works for you, you can use the No Outline command on the Picture Border gallery to remove it.



# Applying Picture Effects

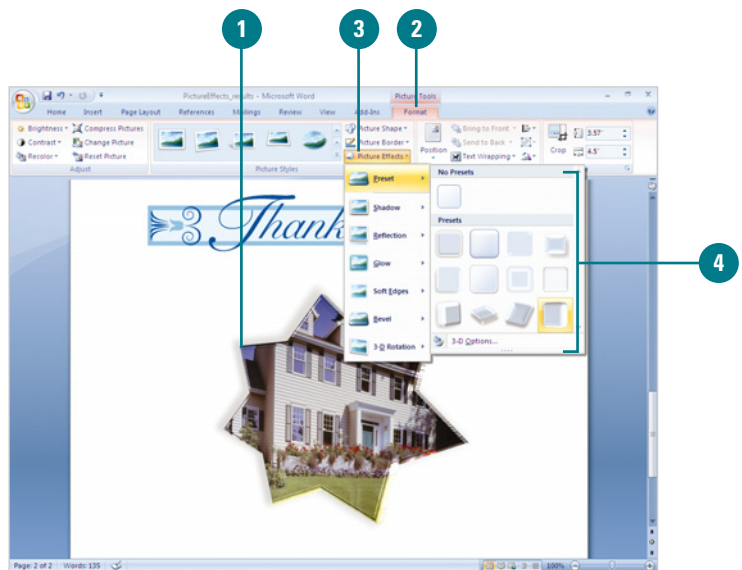
## Add an Effect to a Picture

- 1 Click the picture you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Picture Effects** button, and then point to one of the following:
  - ◆ **Preset** to select No 3-D, one of the preset types, or More 3-D Settings.
  - ◆ **Shadow** to select No Shadow, one of the shadow types, or More Shadows.
  - ◆ **Reflection** to select No Reflection or one of the Reflection Variations.
  - ◆ **Glow** to select No Glow, one of the Glow Variations, or More Glow Colors.
  - ◆ **Soft Edges** to select No Soft Edges or a point size to determine the soft edge amount.
  - ◆ **3-D Rotation** to select No Rotation, one of the rotation types, or More 3-D Settings.

When you point to an effect, a live preview (**New!**) of the style appears in the current shape.

- 4 Click the effect you want from the gallery to apply it.

You can change the look of a picture by applying effects (**New!**), such as shadows, reflections, glow, soft edges, and 3-D rotations. You can also apply effects to a shape by using the Picture Effects gallery for quick results, or by using the Format Shape dialog box for custom results. From the Picture Effects gallery, you can apply a built-in combination of 3-D effects or individual effects to a picture. To quickly see if you like a picture effect, point to a thumbnail in the Picture Effects gallery to display a live preview (**New!**) of it. If you like it, you can apply it. If you no longer want to apply a picture effect to an object, you can remove it. Simply select the picture, point to the effect type on the Picture Effects gallery, and then select the No effect type option.



# Modifying Picture Size

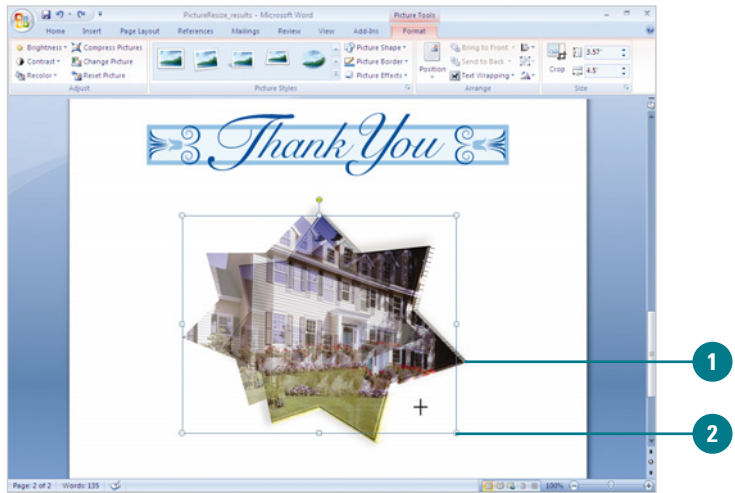
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## Resize a Picture

- 1 Click the object you want to resize.
- 2 Drag one of the sizing handles to increase or decrease the object's size.
  - ◆ Drag a middle handle to resize the object up, down, left, or right.
  - ◆ Drag a corner handle to resize the object proportionally.

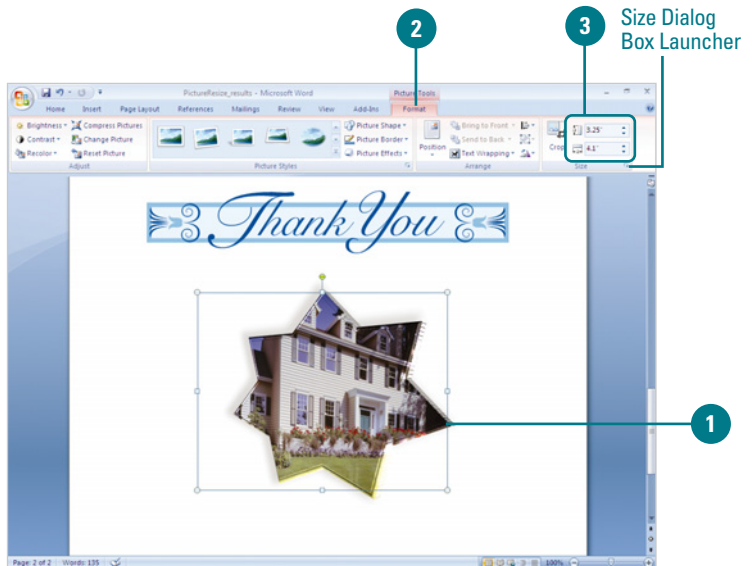
Once you have inserted a picture, clip art and other objects into your document, you can adapt them to meet your needs. Like any object, you can resize a picture. You can use the sizing handles to quickly resize a picture or use height and width options in the Size group on the Format tab to resize a picture more precisely. If you want to set unique or multiple options at the same time, you can use the Size and Position dialog box. These options allow you to make sure your pictures keep the same relative proportions as the original and lock size proportions.



## Resize a Picture Precisely

- 1 Click the object you want to resize.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the up and down arrows or enter a number (in inches) in the Height and Width boxes on the Ribbon and press Enter.

If the **Lock aspect ratio** check box is selected in the Size and Position dialog box, height or width automatically changes when you change one of them. Click the **Size Dialog Box Launcher** to change the option.



## Precisely Scale a Picture

- 1 Click the object you want to resize.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Size Dialog Box Launcher**.
- 4 To keep the picture proportional, select the **Lock aspect ratio** check box.
- 5 To keep the picture the same relative size, select the **Relative to original picture size** check box.
- 6 Click the up and down arrows or enter a number in the Height and Width boxes in one of the following:

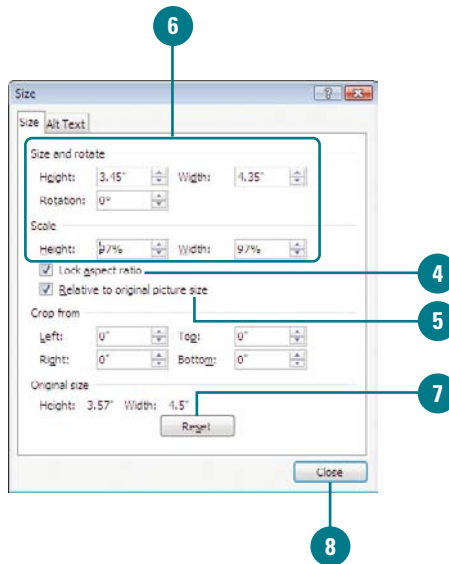
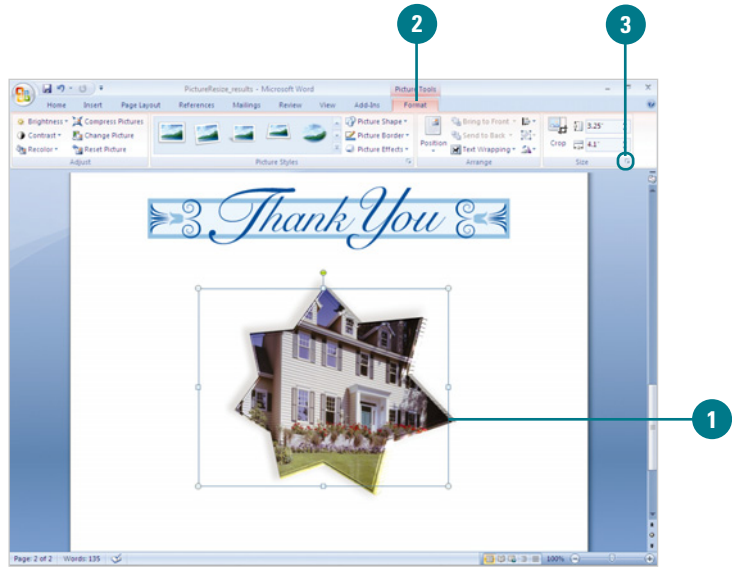
- ◆ **Size.** Enter a height and width size in inches.
- ◆ **Scale.** Enter a percentage size.

If the Lock aspect ratio check box is selected, height or width automatically changes when you change one of them.

- 7 If you want to remove your changes, click **Reset**.
- 8 Click **Close**.

### Did You Know?

**Resizing bitmaps can cause distortion.** Bitmap images are made up of dots, and do not lend themselves as easily to resizing because the dots can't expand and contract, which can lead to distortion. To avoid distortion, resize bitmaps proportionally and try to resize smaller instead of larger.



# Compressing a Picture

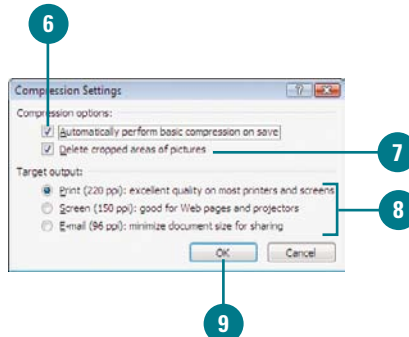
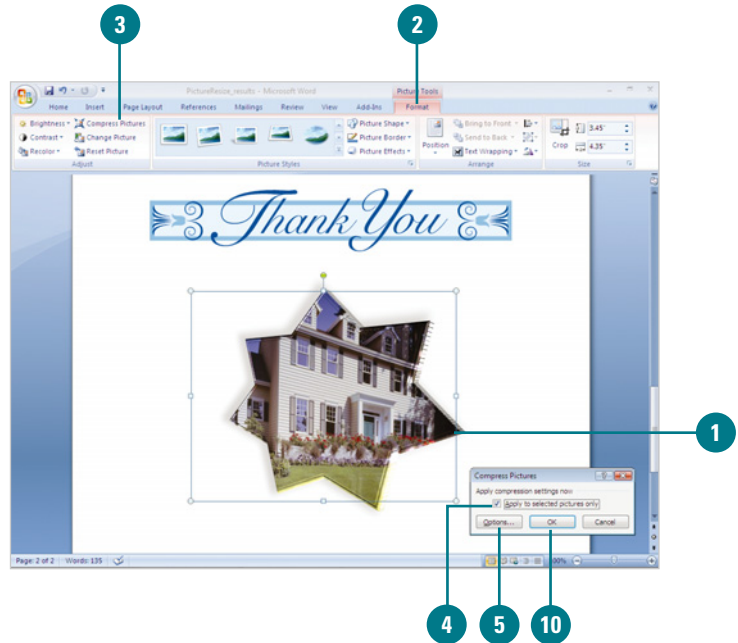
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## Compress a Picture

- 1 Click to select the pictures you want to compress.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Compress Pictures** button.
- 4 Select the **Apply to selected pictures only** check box to apply compression setting to only the selected picture. Otherwise, clear the check box to compress all pictures in your document.
- 5 Click **Options**.
- 6 Select or clear the **Automatically perform basic compression on save** check box.
- 7 Select or clear the **Delete cropped areas of pictures** check box to reduce file size.
- 8 Click the **Print, Screen, or E-mail** option to specify a target output.
- 9 Click **OK** to close the Compression Settings dialog box.
- 10 Click **OK**.

Office allows you to compress pictures in order to minimize the file size of the image. In doing so, however, you may lose some visual quality, depending on the compression setting. You can pick the resolution that you want for the pictures in a document based on where or how they'll be viewed (for example, on the Web or printed). You can also set other options, such as Delete cropped areas of picture, to get the best balance between picture quality and file size, or automatically compress pictures when you save your document.



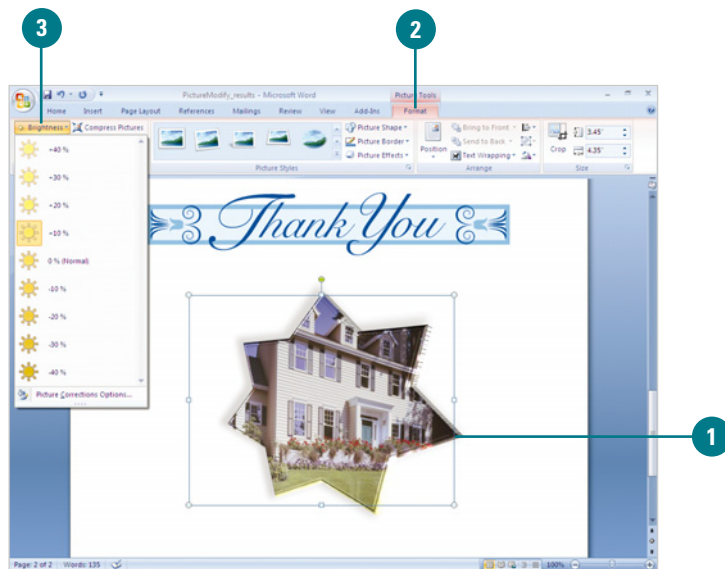
# Modifying Picture Brightness and Contrast

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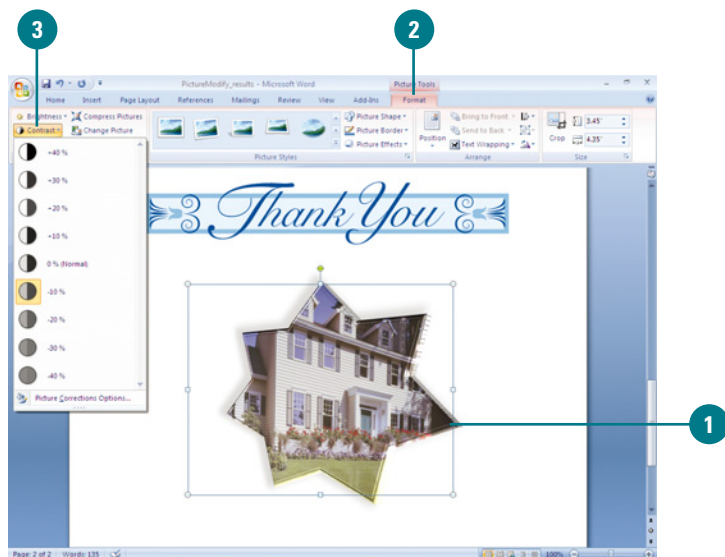
## Change Brightness

- 1 Click the picture whose brightness you want to increase or decrease.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Brightness** button, and then do one of the following:
  - ◆ Click a positive brightness to lighten the object colors by adding more white, or click a negative brightness to darken the object colors by adding more black.
  - ◆ Click **Picture Corrections Options** to set other specific brightness percentages.



## Change Contrast

- 1 Click the picture whose contrast you want to increase or decrease.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Contrast** button, and then do one of the following:
  - ◆ Click a positive contrast to increase intensity, resulting in less gray, or click a negative contrast to decrease intensity, resulting in more gray.
  - ◆ Click **Picture Corrections Options** to set other specific contrast percentages.



# Recoloring a Picture

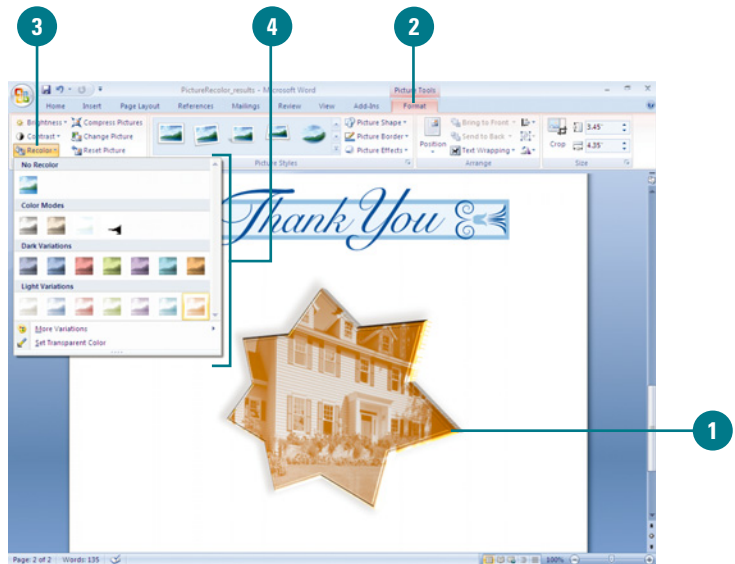
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## Recolor a Picture

- 1 Click the picture whose color you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Recolor** button.
- 4 Click one of the following color options:
  - ◆ **No Recolor.** Click this option to remove a previous recolor.
  - ◆ **Color Modes.** Click an option to apply a color type:
    - Grayscale.** Converts colors into whites, blacks and shades of gray between black and white.
    - Sepia.** Converts colors into very light gold and yellow colors like a picture from the old west.
    - Washout.** Converts colors into whites and very light colors.
    - Black and White.** Converts colors into only white and black.
  - ◆ **Dark and Light Variations.** Click an option to apply an accent color in light or dark variations.
  - ◆ **More Variations.** Point to this option to select a specific color.

You can recolor clip art and other objects to match the color scheme of your document. For example, if you use a flower clip art as your business logo, you can change shades of pink in the spring to shades of orange in the autumn. The Recolor Picture Quick Style gallery (**New!**) provides a variety of different formatting combinations. To quickly see if you like a Recolor Picture Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected shape. If you like it, you can apply it. You can also use a transparent background in your picture to avoid conflict between its background color and your document's background. With a transparent background, the picture takes on the same background as your document.



## Set a Transparent Background

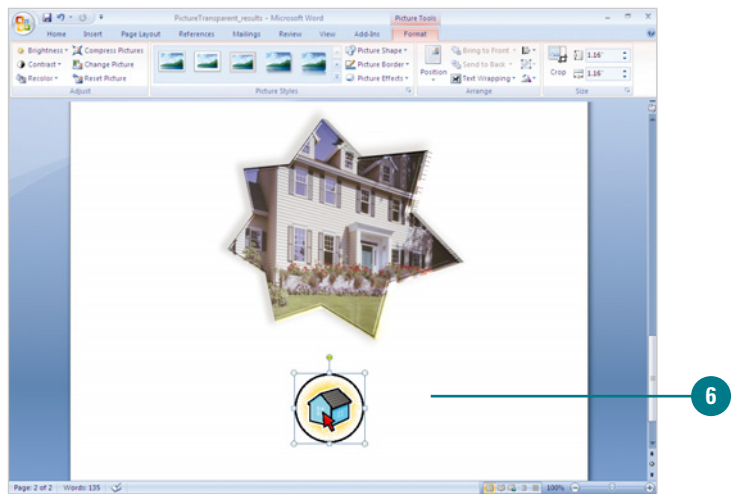
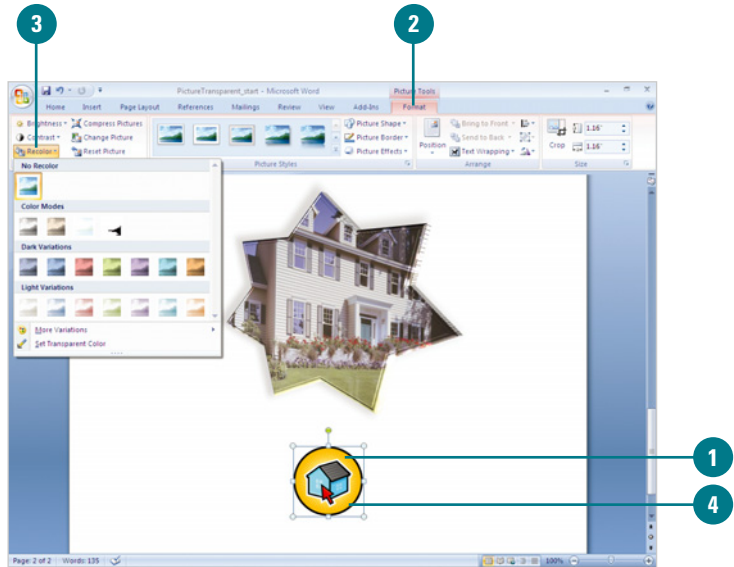
- 1 Click the picture you want to change.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Recolor** button, and then click **Set Transparent Color**.
- 4 Move the pointer over the object until the pointer changes shape.
- 5 Click the color you want to set as transparent.
- 6 When you're done, click outside the image.

### Did You Know?

**Why is the Set Transparent Color command dimmed?** Setting a color as transparent works only with bitmaps. If you are working with an object that is not a bitmap, you will not be able to use this feature.

**You can't modify some pictures in Word.** If the picture is a bitmap (.BMP, .JPG, .GIF, or .PNG), you need to edit its colors in an image editing program, such as Adobe Photoshop, Microsoft Paint, or Paint Shop Pro.

**You can reset a picture back to its original state.** Click the picture you want to reset, click the Format tab under Picture Tools, and then click the Reset Picture button.



# Cropping and Rotating a Picture

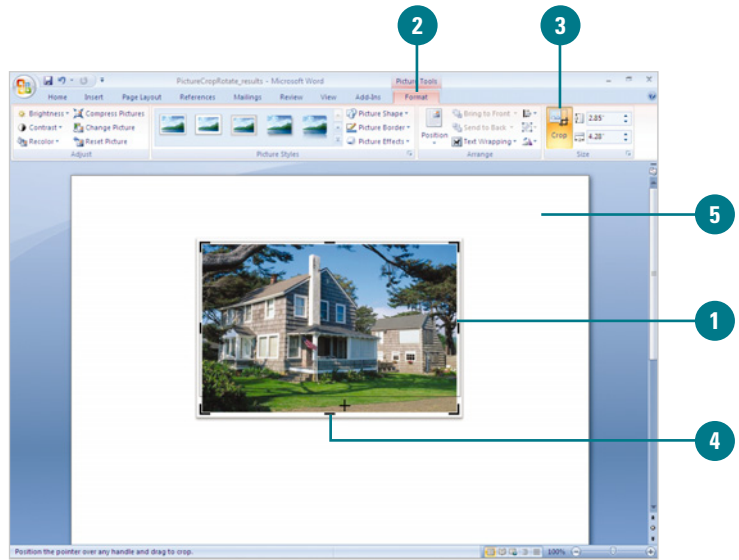
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## Crop a Picture Quickly

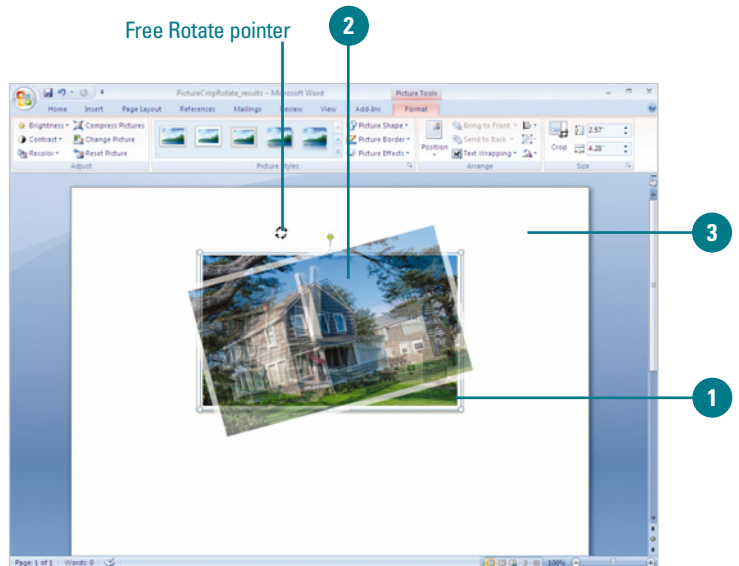
- 1 Click the picture you want to crop.
- 2 Click the **Format** tab under Picture Tools.
- 3 Click the **Crop** button.
- 4 Drag the sizing handles until the borders surround the area you want to crop.
- 5 Click outside the image when you are finished.

You can crop clip art to isolate just one portion of the picture. Because clip art uses vector image technology, you can crop even the smallest part of it and then enlarge it, and the clip art will still be recognizable. You can also crop bitmapped pictures, but if you enlarge the area you cropped, you lose picture detail. Use the crop button to crop an image by hand. You can also crop using the Size and Position dialog box, which gives you precise control over the dimensions of the area you want to crop. You can also rotate a picture by increments or freehand.



## Rotate a Picture

- 1 Click the object you want to rotate.
- 2 Position the pointer (which changes to the Free Rotate pointer) over the green rotate lever at the top of the object, and then drag to rotate the object.
- 3 Click outside the object to set the rotation.



# Creating WordArt Text

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## Insert WordArt Text

- 1 Click the **Insert** tab.
- 2 Click the **WordArt** button, and then click one of the WordArt styles.

A WordArt text box appears on the document with selected placeholder text.

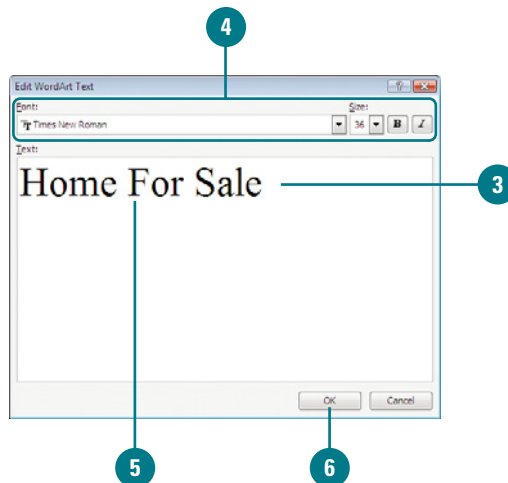
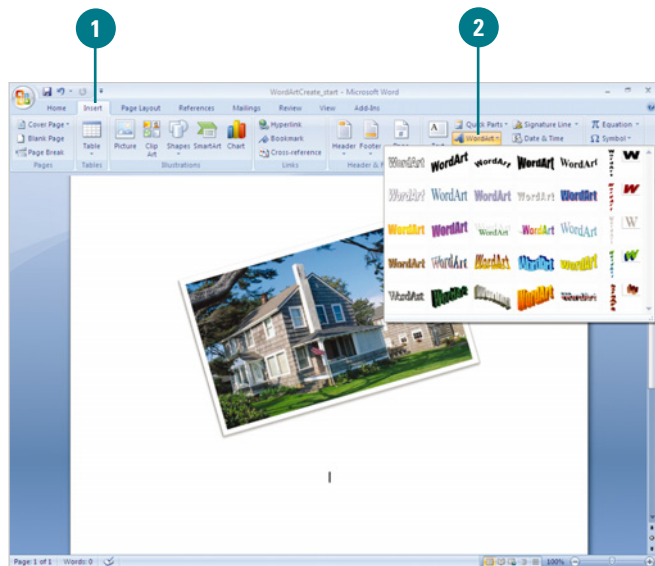
- 3 Type the text you want WordArt to use.
- 4 Use the Font options to modify the text you entered.
- 5 To edit WordArt text, click to place the insertion point where you want to edit, and then edit the text.
- 6 Click **OK**.

### Did You Know?

**You can convert text in a text box to WordArt.** Select the text box, click the Insert tab, click the WordArt button, and then click the WordArt text style you want.

**You can edit WordArt text.** Select the WordArt text you want to remove, click the Format tab, click the Edit Text button, delete the text, and then click OK.

The WordArt feature lets you create stylized text to draw attention to your most important words. Most users apply WordArt to a word or a short phrase, such as *Make a Difference*. You should apply WordArt to a document sparingly. Its visual appeal and unique look requires uncluttered space. When you use WordArt, you can choose from a variety of text styles that come with the WordArt Quick Style gallery, or you can create your own using tools in the WordArt Styles group. To quickly see if you like a WordArt Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected text. If you like it, you can apply it. You can also use the free angle handle (pink diamond) inside the selected text box to adjust your WordArt text angle.



# Formatting WordArt Text

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## Apply a Different WordArt Style to Existing WordArt Text

- 1 Click the WordArt object whose style you want to change.
- 2 Click the **Format** tab under WordArt Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the WordArt Styles group to see additional styles.

The current style appears highlighted in the gallery.

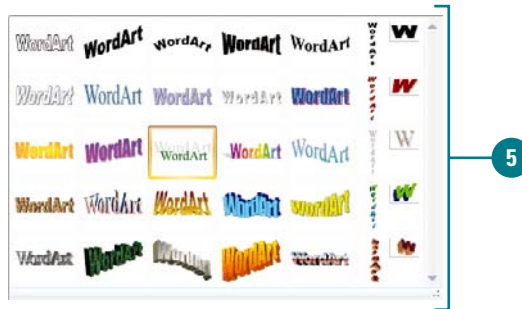
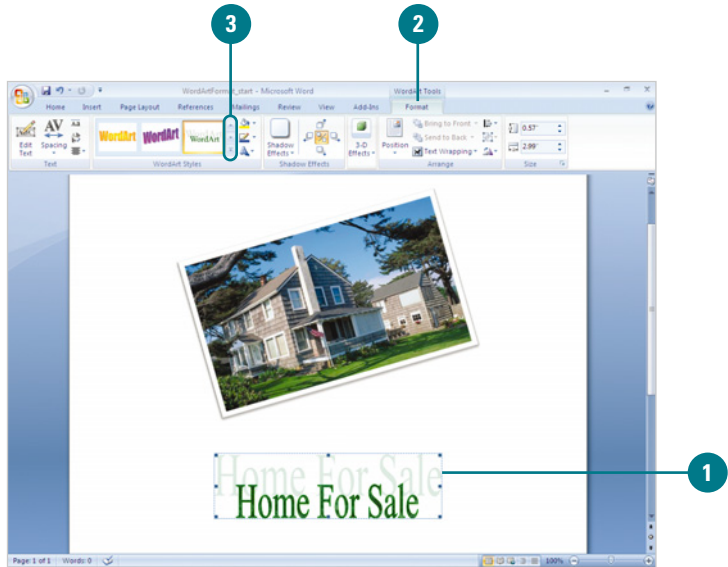
- 4 Point to a style.  
A live preview (**New!**) of the style appears in the current shape text.
- 5 Click the style you want from the gallery to apply it to the selected text.

### Did You Know?

**You can add more formatting to WordArt text.** Select the WordArt object, click the Home tab, and then use the formatting button in the Font and Paragraph groups.

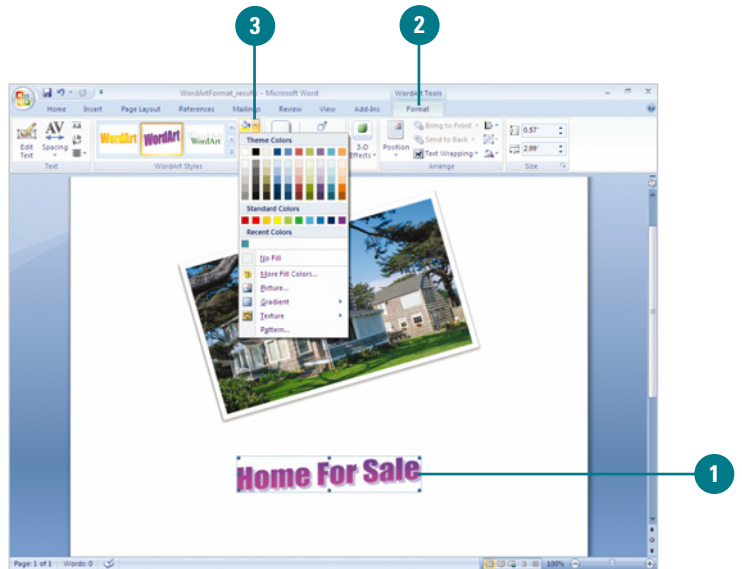
**You can change the WordArt fill color to match the background.** Click the WordArt object, right-click the object, click Format Shape, click the Background option, and then click Close.

In addition to applying one of the preformatted WordArt styles, you can also create your own style by shaping your text into a variety of shapes, curves, styles, and color patterns. The WordArt Styles group gives you tools for changing the fill and outline of your WordArt text. To quickly see if you like a WordArt Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected text. If you like it, you can apply it.



## Apply a Fill to WordArt Text

- 1 Click the WordArt object you want to change.
- 2 Click the **Format** tab under Drawing or WordArt Tools.
- 3 Click the **Shape Fill** button arrow, and then click or point to one of the following:
  - ◆ **Color** to select a theme or standard color.
  - ◆ **No Fill** to remove a fill color.
  - ◆ **Picture** to select a picture file.
  - ◆ **Gradient** to select No Gradient, one of the shadow types, or More Gradients.
  - ◆ **Texture** to select one of the of the texture types, or More Textures.

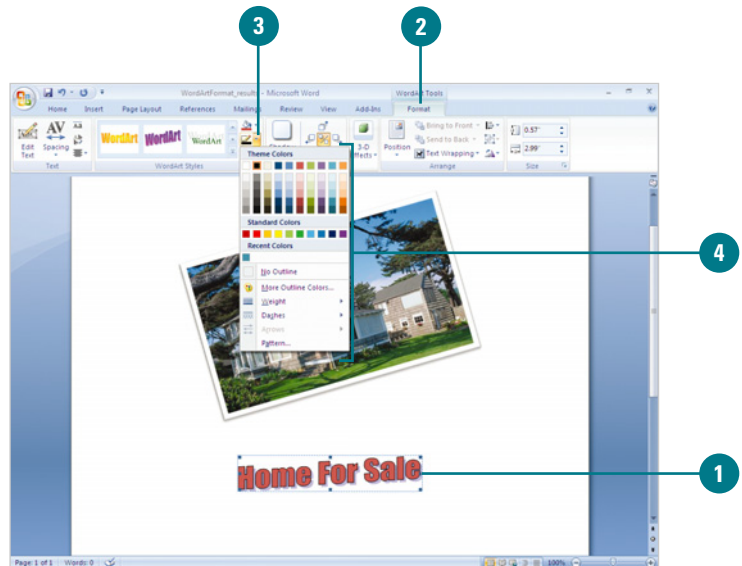


## Apply a Fill to WordArt Text

- 1 Click the WordArt object you want to change.
- 2 Click the **Format** tab under WordArt Tools.
- 3 Click the **Shape Outline** button.
- 4 Click a color, or point to **Weight** or **Dashes**, and then select a style.

### Did You Know?

*You can change the shape of WordArt text.* Select the WordArt object, click the Format tab under WordArt Tools, click the Change WordArt Shape button, and then select a shape.



# Applying WordArt Text Effects

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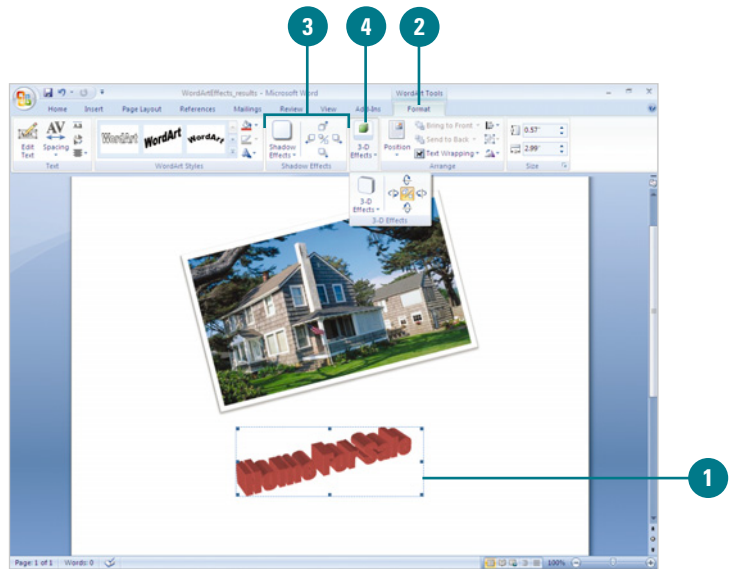
## Apply an Effect to WordArt Text

- 1 Click the WordArt object you want to change.
- 2 Click the **Format** tab under WordArt Tools.
- 3 To add a shadow, click the **Shadow Effects**, and then select a shadow effect.
  - ◆ To change the location and length of a shadow, click any of the Nudge Shadow buttons.
  - ◆ To remove a shadow, click the **Shadow On/Off** button in the middle of the Nudge Shadow buttons.
- 4 To add a 3D effect, click the **3-D Effects**, click the **3-D Effects** button, and then select a 3D effect.
  - ◆ To change the location and length of a 3-D effect, click any of the Tilt buttons.
  - ◆ To remove a shadow, click the **3-D On/Off** button in the middle of the Tilt buttons.

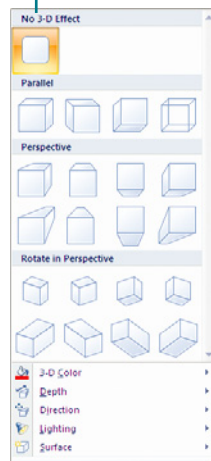
### Did You Know?

**You can change the WordArt text spacing.** Select the WordArt object, click the Format tab under WordArt Tools, click the Spacing button, and then select a spacing option.

You can change the look of WordArt text by applying effects, such as shadows and 3-D rotations. You can apply effects to a shape by using the Shadow or 3-D Effects gallery for quick results. From the 3-D Effects gallery you can apply a built-in combination of 3-D effects or individual 3-D effects to WordArt text. To quickly see if you like the effect, point to a thumbnail in the Shadow or 3-D Effects gallery to display a live preview (**New!**) of it. If you like it, you can apply it. If you no longer want to apply the effect, you can remove it. Simply, select the WordArt text, and then select the No effect type option on the Shadow Effects or 3-D Effects gallery.



### 3-D Effects gallery



# Modifying WordArt Text Position

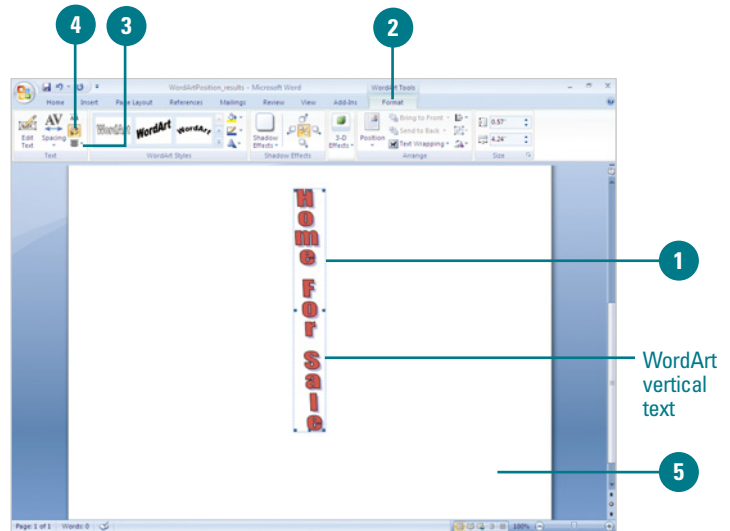
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## Change WordArt Text Direction

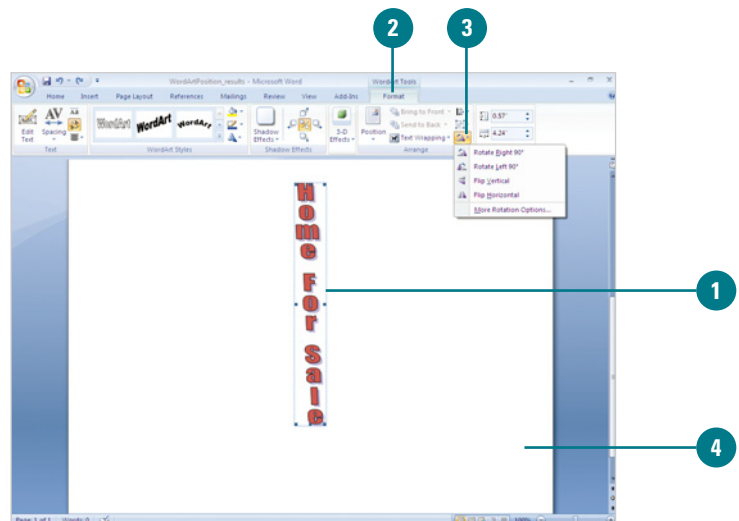
- 1 Click the WordArt object you want to change.
- 2 Click the **Format** tab under WordArt Tools.
- 3 To align text, click the **Align Text** button, and then select an option: **Left Align**, **Center**, **Right Align**, **Word Justify**, **Letter Justify**, **Letter Justify**, or **Stretch Justify**.
- 4 To stack text vertically, click the **WordArt Vertical Text** button.
- 5 Click outside the object to deselect it.

You can apply a number of text effects to your WordArt objects that determine letter height, justification, alignment, and spacing. The effects of some of the adjustments you make are more pronounced for certain WordArt styles than others. Some of these effects make the text unreadable for certain styles, so apply these effects carefully. If the text position is not what you want, you can also use the Rotate button to rotate right or left 90 degrees or flip vertical or horizontal.



## Rotate WordArt Text

- 1 Click the WordArt object you want to rotate.
- 2 Click the **Format** tab under WordArt Tools.
- 3 Click the **Rotate** button, and then select an option: **Rotate Right 90**, **Rotate Left 90**, **Flip Vertical**, or **Flip Horizontal**.
- 4 Click outside the object to deselect it.



# Creating SmartArt Graphics

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## Create a SmartArt Graphic

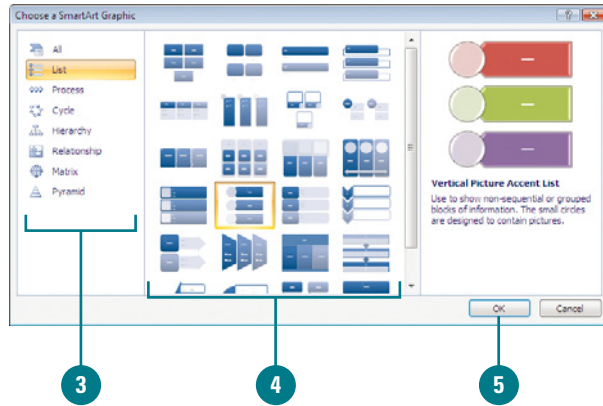
- 1 Click the **Insert** tab.
- 2 Click the **SmartArt** button.
- 3 In the left pane, click a category, such as All, List, Process, Cycle, Hierarchy, Relationship, Matrix, or Pyramid.
- 4 In the middle pane, click a SmartArt graphic style type.
- 5 Click **OK**.

The SmartArt graphic appears in the document.

### Did You Know?

*You can change a SmartArt diagram type.* Select the SmartArt graphic, click the Design tab under SmartArt Tools, click the More list arrow for Layouts, click More Layout, select a diagram type, and then click OK.

SmartArt graphics (**New!**) allow you to create diagrams that convey processes or relationships. Office Word provides a wide variety of built-in SmartArt graphic types, including graphical lists, process, cycle, hierarchy, relationship, matrix, and pyramid. Using built-in SmartArt graphics makes it easy to create and modify charts without having to create them from scratch. To quickly see if you like a SmartArt graphic layout, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected shape. If you like it, you can apply it.



### SmartArt Graphic Purposes

Type	Purpose
List	Show non-sequential information
Process	Show steps in a process or timeline
Cycle	Show a continual process
Hierarchy	Show a decision tree or create an organization chart
Relationship	Illustrate connections
Matrix	Show how parts relate to a whole
Pyramid	Show proportional relationships up and down

6 Click the **Text Pane** button, or click the control with two arrows along the left side of the selection to show the Text pane.

7 Label the shapes by doing one of the following:

- ◆ Type text in the [Text] box.

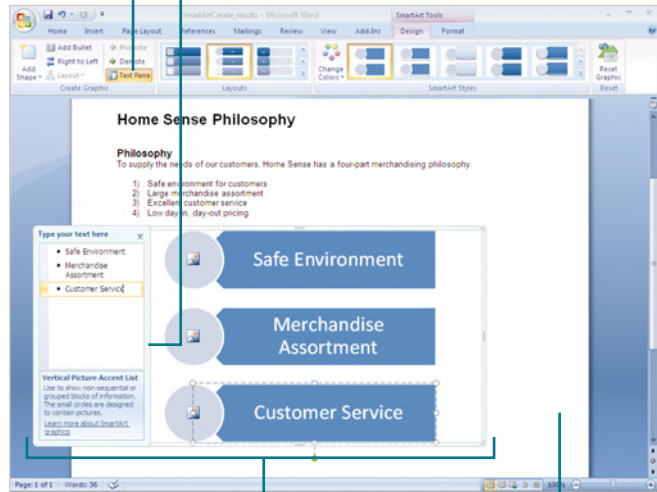
You can use the arrow keys to move around the Text pane, or use the Promote or Demote buttons to indent.

- ◆ At the end of a line, press Enter to insert a line (shape), or select line text, and then press Delete to remove a line (shape).

- ◆ Click a shape, and then type text directly into the shape.

8 When you're done, click outside of the SmartArt graphic.

Text Pane button 6



### Did You Know?

**You cannot drag text into the Text pane.** Although you can't drag text into the Text pane, you can copy and paste text.

**You can create a blank SmartArt graphic.** In the Text pane, press Ctrl+A to select all the placeholder text, and then press Delete.

# Using the Text Pane with SmartArt Graphics

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## Show or Hide the Text Pane

- 1 Click the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 Do any of the following:
  - ◆ **Show.** Click the **Text Pane** button, or click the control with two arrows along the left side of the SmartArt graphic selection to show the Text pane.
  - ◆ **Hide.** Click the **Text Pane** button, click the **Close** button on the Text pane, deselect the SmartArt graphic.

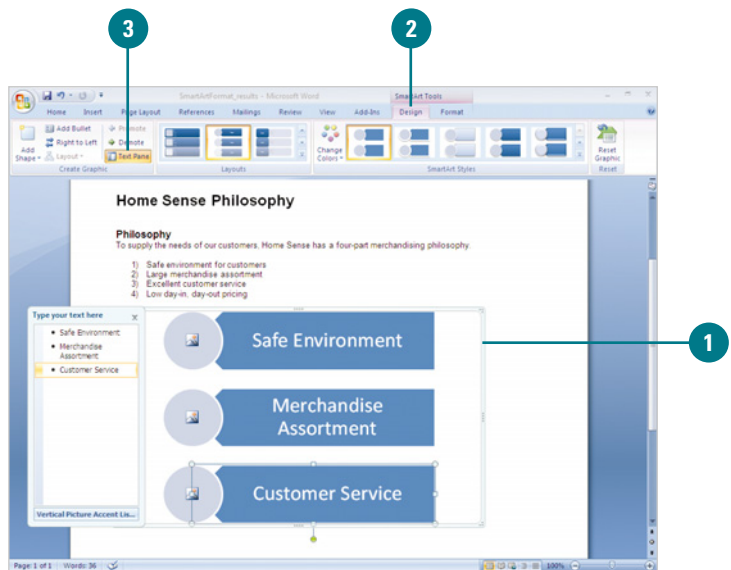
The Text Pane button toggles to show or hide the Text pane.

### Did You Know?

**You can resize the Text pane.** To resize the Text pane, point to any edge (pointer changes to double-headed arrow), and then drag to resize it.

**You can move the Text pane.** To move the Text pane, drag the top of the pane. The Text pane location resets when you exit Excel.

After you create a layout for a SmartArt graphic, a Text pane (**New!**) appears next to your selected SmartArt graphic. The bottom of the Text pane displays a description of the SmartArt graphic. The Text pane and SmartArt graphic contain placeholder text. You can change the placeholder text in the Text pane or directly in the SmartArt graphic. The Text pane works like an outline or a bulleted list and the text corresponds directly with the shape text in the SmartArt graphic. As you add and edit content, the SmartArt graphic automatically updates, adding or removing shapes as needed while maintaining the design. If you see a red "x" in the Text pane, it means that the SmartArt graphic contains a fixed number of shapes, such as Counterbalance Arrows (only two).



## Work with Text in the Text Pane

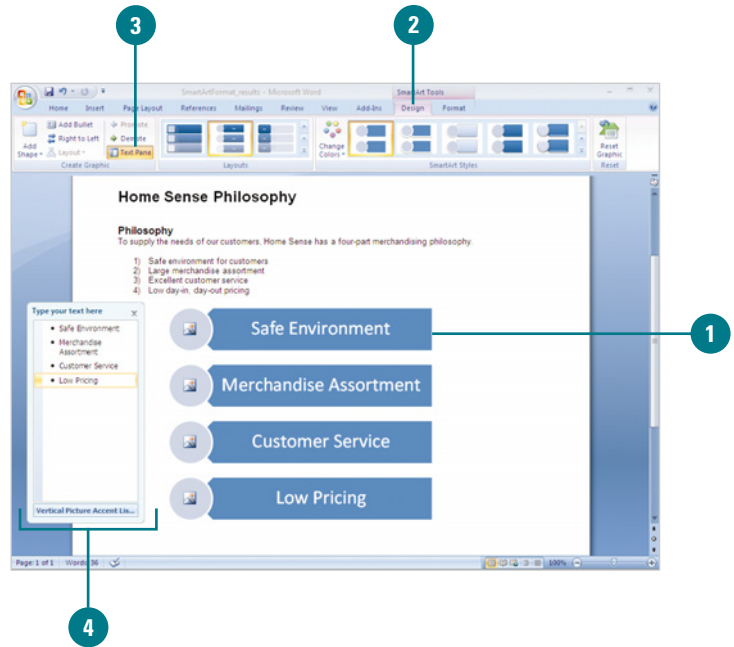
- 1 Click the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 If necessary, click the **Text Pane** button to show the Text pane.
- 4 Do any of the following tasks:
  - ◆ **New line.** At the end of a line, press Enter.
  - ◆ **Indent line right.** Press Tab, or click the **Promote** button.
  - ◆ **Indent line left.** Press Shift+Tab, or click the **Demote** button.
  - ◆ **Delete line.** Select the line text, and then press Delete.

### Did You Know?

**You can format text in the Text pane.**

When you apply formatting to text in the Text pane, it doesn't display in the Text pane, but it does display in the SmartArt graphic.

**You can remove a shape from a SmartArt graphic.** Select the SmartArt graphic, click the shape you want to remove, and then press Delete.



# Formatting a SmartArt Graphic

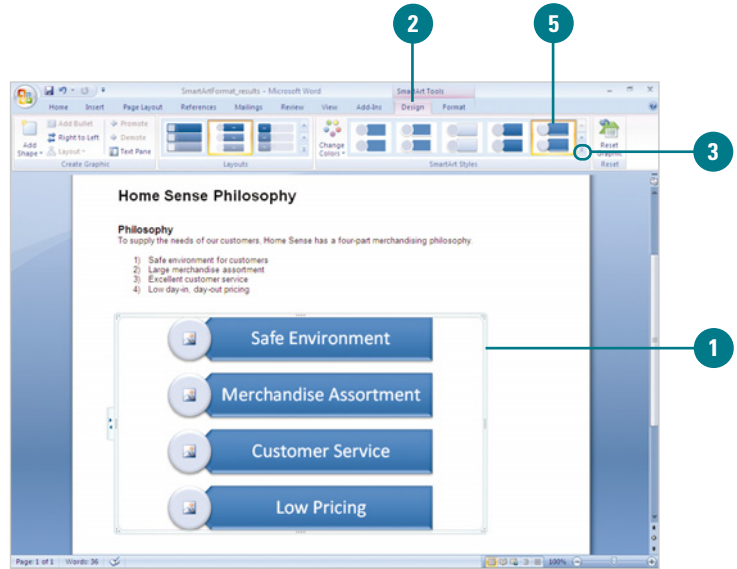
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## Apply a Quick Style to a SmartArt Graphic

- 1 Click the SmartArt graphic you want to modify.
  - 2 Click the **Design** tab under SmartArt Tools.
  - 3 Click the scroll up or down arrow, or click the **More** list arrow in the Quick Styles group to see additional styles.
  - 4 Point to a style.
- A live preview (**New!**) of the style appears in the current shape.
- 5 Click the layout for the SmartArt graphic you want from the gallery.

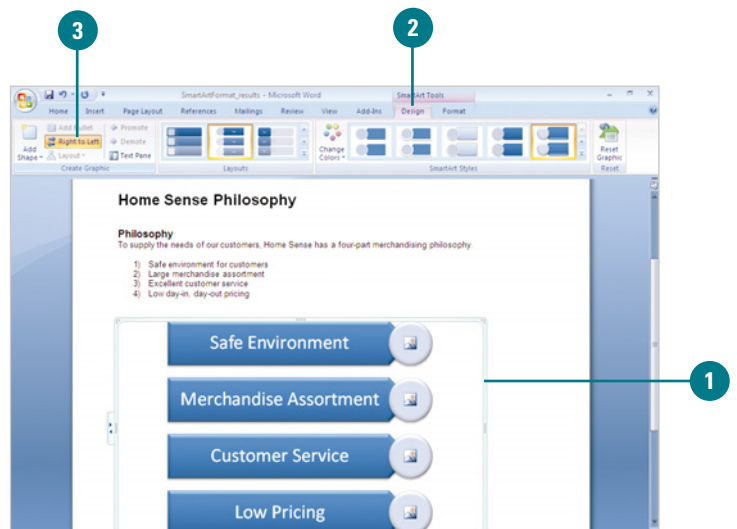
If your current SmartArt graphics don't quite convey the message or look you want, use live preview (**New!**) to quickly preview layouts in the Quick Styles (**New!**) and Layout Styles (**New!**) groups and select the one you want. If you only want to change the color, you can choose different color schemes using theme colors by using the Change Color button (**New!**). If the flow of a SmartArt graphic is not the direction you want, you can change the orientation.



## Change a Smart Graphic Orientation

- 1 Click the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 Click the **Right to Left** button.

The button toggles, so you can click it again to switch back.

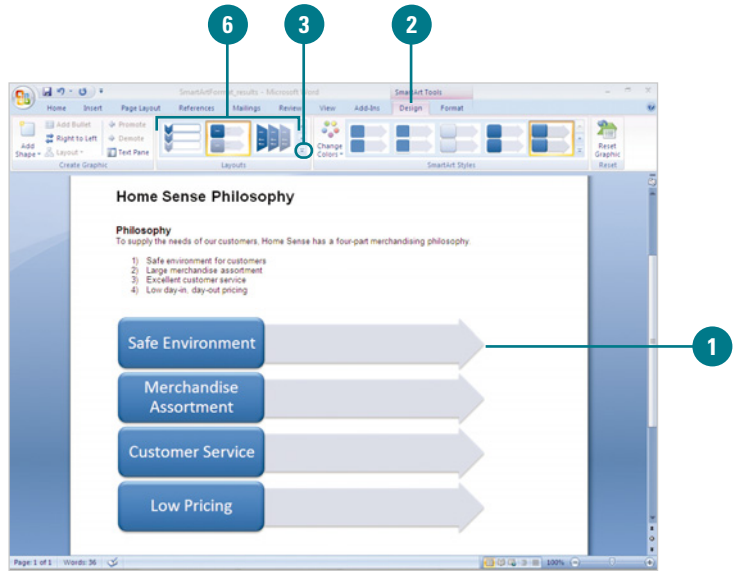


## Change a SmartArt Graphic Layout

- 1 Click the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Layout Styles group to see additional styles.
- 4 To view the entire list of diagram layouts, click **More Layouts**.
- 5 Point to a layout.
- 6 Click the layout for the SmartArt graphic you want from the gallery.
- 7 If you opened the entire list of layouts, click **OK**.

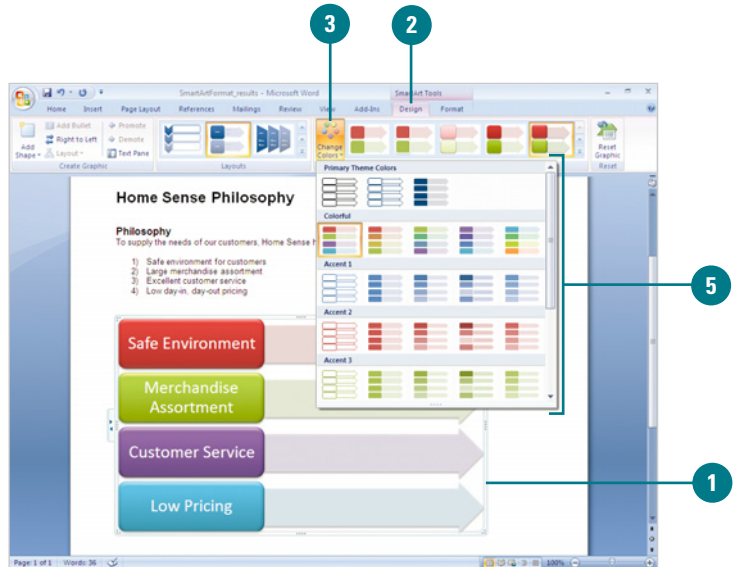
The gallery displays layouts designed for bulleted lists.

A live preview (**New!**) of the style appears in the current shape.



## Change a SmartArt Graphic Colors

- 1 Click the SmartArt graphic you want to modify.
  - 2 Click the **Design** tab under SmartArt Tools.
  - 3 Click the **Change Colors** button.
  - 4 Point to a style.
  - 5 Click the layout for the SmartArt graphic you want from the gallery.
- The gallery displays the current layout with different theme colors.
- A live preview (**New!**) of the style appears in the current shape.



# Modifying a SmartArt Graphic

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## Add a Shape to a SmartArt Graphic

- 1 Select the shape in the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 Click the **Add Shape** button to insert a shape at the end, or click the **Add Shape** button arrow, and then select the position where you want to insert a shape.

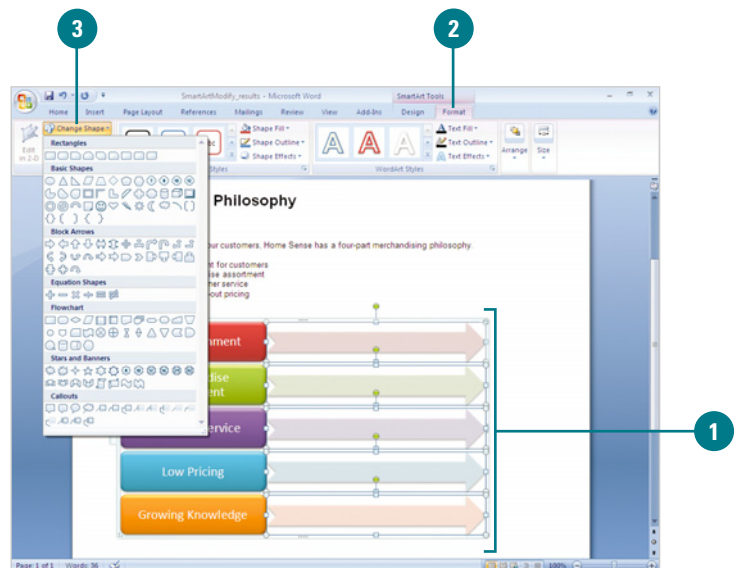
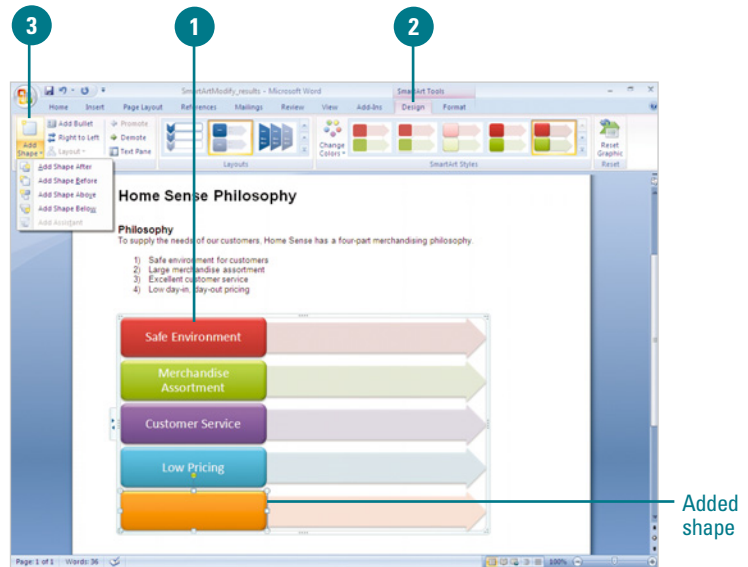
## Change Shapes in a SmartArt Graphic

- 1 Select the shapes in the SmartArt graphic you want to modify.
- 2 Click the **Format** tab under SmartArt Tools.
- 3 Click the **Change Shape** button, and then click a shape.

### Did You Know?

*You can reset a SmartArt graphic back to its original state.* Select the SmartArt graphic, click the Design tab for SmartArt Tools, and then click the Reset Graphic button.

After you create a SmartArt graphic, you can add, remove, change, or rearrange shapes to create a custom look. For shapes within a SmartArt graphic, you can change the shape from the Shape gallery or use familiar commands, such as Bring to Front, Send to Back, Align, Group, and Rotate, to create your own custom SmartArt graphic (**New!**). If you no longer want a shape you've added, simply select it, and then press Delete to remove it.



# Creating an Organization Chart

## Create an Organization Chart Using a SmartArt Graphic

- 1 Click the **Insert** tab.
- 2 Click the **SmartArt** button.
- 3 In the left pane, click **Hierarchy**.
- 4 In the middle pane, click a SmartArt organization chart type.
- 5 Click **OK**.

The SmartArt graphic appears with a Text pane to insert text.

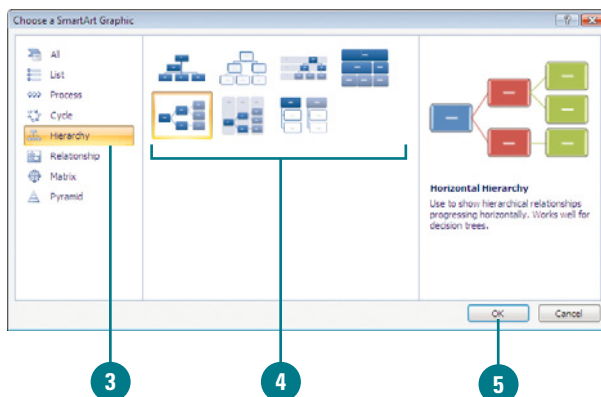
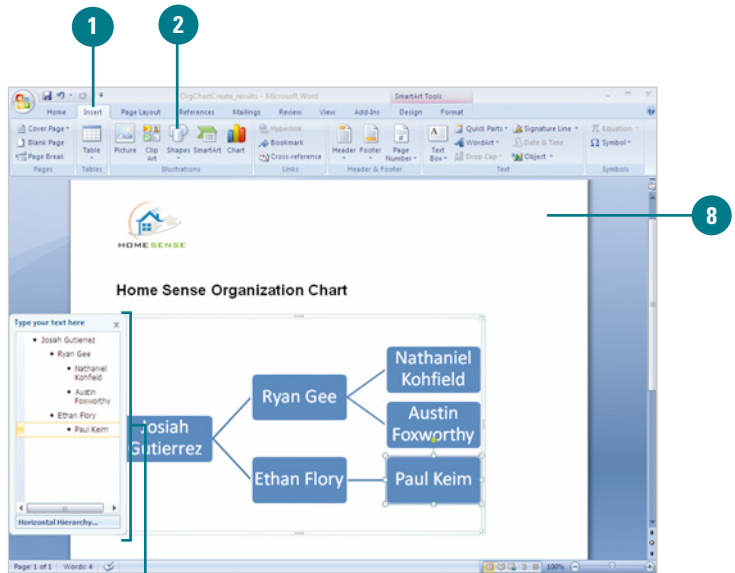
- 6 Label the shapes by doing one of the following:
  - ◆ Type text in the [Text] box.  
You can use the arrow keys to move around the Text pane.
  - ◆ Click a shape, and then type text directly into the shape.

- 7 To add shapes from the Text pane, place the insertion point at the beginning of the text where you want to add a shape, type the text you want, press Enter, and then to indent the new shape, press Tab or to promote, press Shift+Tab.

You can also click the **Add Shape** button arrow on the **Design** tab under SmartArt Tools, and then select the type of shape you want to add.

- 8 When you're done, click outside of the SmartArt graphic.

An organization chart shows the reporting relationships between individuals in an organization. For example, you can show the relationship between a manager and employees within a company. You can create an organization chart using a SmartArt graphic (**New!**) or using Microsoft Organization Chart. A SmartArt graphic organization chart makes it easy to add shapes using the graphic portion or the Text pane.



# Modifying an Organization Chart

## Change the Layout or Apply a Quick Style to an Organization Chart

- 1 Click the SmartArt graphic you want to modify.
- 2 Click the **Design** tab under SmartArt Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Layouts group or Quick Styles group to see additional styles.

The gallery displays different layouts or the current layout with different theme colors.

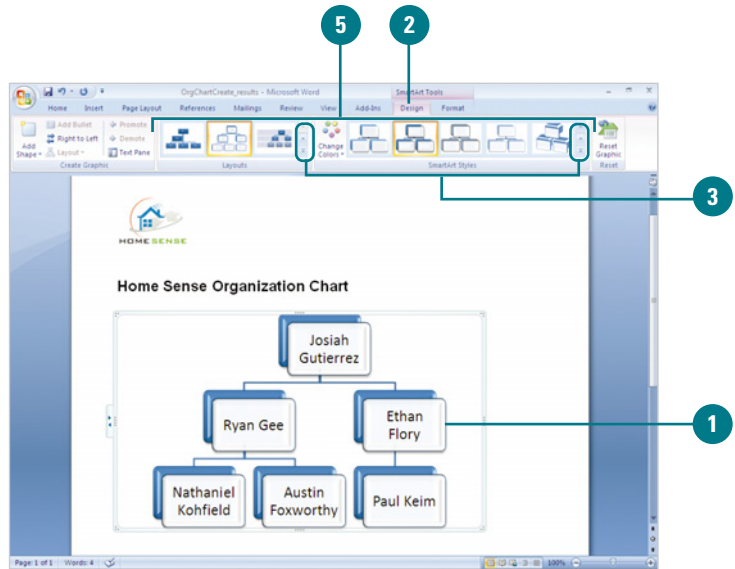
- 4 Point to a style.
- A live preview (**New!**) of the style appears in the current shape.
- 5 Click the layout or style for the SmartArt graphic you want from the gallery.

### Did You Know?

**You can change organization chart lines to dotted lines.** Right-click the line you want to modify, click Format Object, click Line Style, click Dash type, click a style, and then click Close.

**You can change the colors of an organization chart.** Click the SmartArt graphic you want to modify, click the Design tab under SmartArt Tools, click the Change Colors button, and then click the color theme you want.

Like any SmartArt graphic, you can add special effects—such as soft edges, glows, or 3-D effects, and animation—to an organization chart. If your organization chart doesn't quite look the way you want, live preview (**New!**) can help you preview layouts in the Quick Styles (**New!**) and Layout Styles (**New!**) groups and select the one you want. If you only want to change the color, you can choose different color schemes using theme colors by using the Change Color button (**New!**).



# Adding Tables and Charts to Documents

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## Introduction

There are times when typing a paragraph will not do your text justice. Creating a bulleted or numbered list might better show your information. Another way to organize items in a document is with a table. A **table** is an object that is inserted into the Word document that displays text in rows and columns. You can set up your table with existing text, or create the table, even draw it out, and enter in new text. Once created, you can adjust the cells (where the text is contained in the rows and columns). You can also adjust the table to insert or delete rows, columns or individual cells, change the alignment of text, sort the text, or even apply a border or shading to the table.

Instead of adding a table of data, you can also insert a chart. Charts add visual interest and useful information represented by lines, bars, pie slices, or other markers. When you insert and create a chart in a document, the chart is an embedded object from Microsoft Office Excel 2007. Word uses Microsoft Excel (**New!**) to embed and display the information in a chart instead of Microsoft Graph. You can resize or move the embedded chart just as you would any graphic object. Your chart is what your reader sees, so make sure to take advantage of the pre-built chart layouts and styles (**New!**) to make the chart appealing and visually informative. There are a wide variety chart types, available in 2-D and 3-D formats, from which to choose. For each chart type, you can select a predefined chart layout and style to apply the formatting you want.

After you finish creating a chart, you can save it as a chart template. A chart template file (**New!**) saves all the customization you made to a chart for use in other documents. You can save any chart in a document as a chart template file and use it to form the basis of your next document chart, which is useful for standard company financial reporting.

## What You'll Do

**Create a Table**

**Enter Text in a Table**

**Sort Table Contents or Lists**

**Modify a Table**

**Adjust Table Cells**

**Align Table Cells**

**Add a Quick Style to a Table**

**Format a Table**

**Change Table Style Options**

**Sum Table Rows and Columns**

**Calculate a Value in a Table**

**Insert and Create a Chart**

**Work with Chart Data**

**Change a Chart Type**

**Change a Chart Layout and Style**

**Change Chart Titles and Labels**

**Format Line and Bar Charts**

**Edit Chart Data**

**Save a Chart Template**

# Creating a Table

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## Create a Table from Existing Text

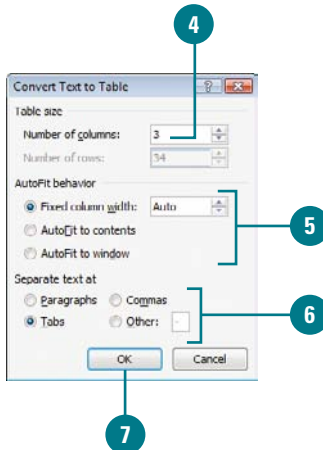
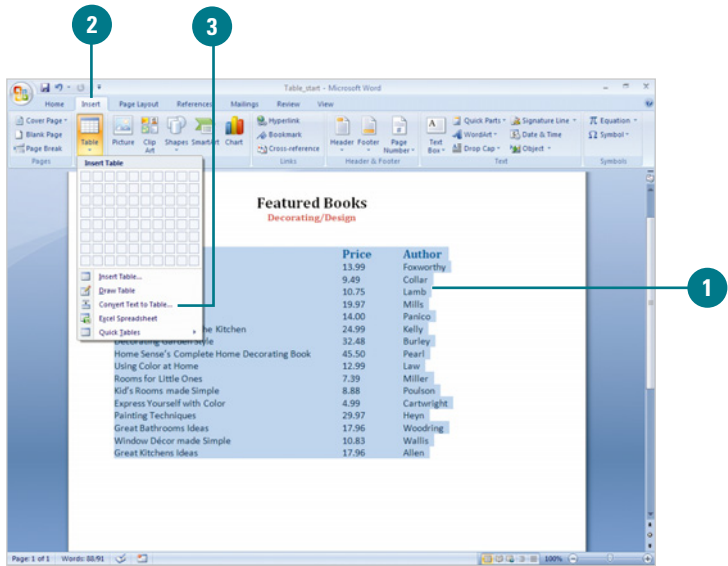
- 1 Select the text for the table.
- 2 Click the **Insert** tab.
- 3 Click the **Table** button, and then click **Convert Text to Table**.
- 4 Enter the number of columns.
- 5 Select an AutoFit column width option.
- 6 Click a symbol to separate text into cells.
- 7 Click **OK**.

### Did You Know?

**You can convert a table back to text.** Select the table, click the Layout tab under Table Tools, click the Convert to Text button, select the Separate text with option (typically Tabs), and then click OK.

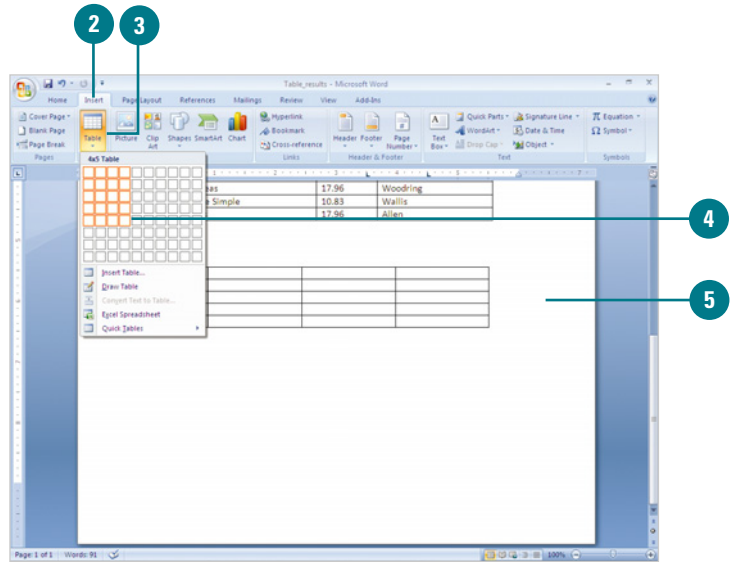
**You can insert a Quick Table (New!).** If you need a calendar, or a specific table layout, such as double table, matrix, tabular list, you can use the Quick Tables command to select the one you want. The tables come with predefined data or information, which you can delete.

A **table** organizes information neatly into rows and columns. The intersection of a row and a column is called a **cell**. You can insert tables by specifying a size, or drawing rows and columns to create a custom table, or you can create a table from existing text separated by paragraphs, tabs, or commas. In addition, you can create **nested tables** (a table created within a table cell), **floating tables** (tables with text wrapped around them), or **side-by-side tables** (separate but adjacent tables). If you decide not to use a table, you can convert it to text.



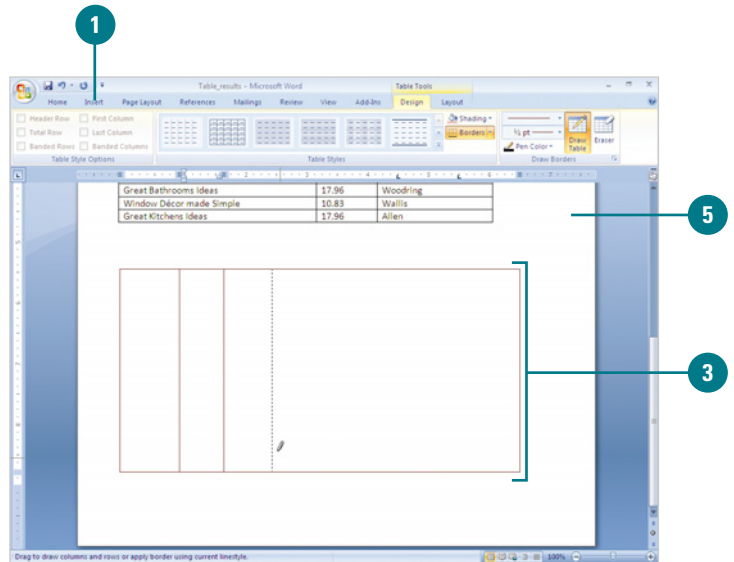
## Create a New Table Quickly

- 1 Click to place the insertion point where you want to insert a table.
- 2 Click the **Insert** tab.
- 3 Click the **Table** button, and then drag to select the number of rows and columns you want, or click **Insert Table**, enter the number of columns and rows you want, and then click **OK**.
- 4 Release the mouse button to insert a blank grid in the document.
- 5 When you're done, click outside of the table.



## Draw a Custom Table

- 1 Click the **Insert** tab.
- 2 Click the **Table** button, and then click **Draw Table**.
- 3 Draw the table.
  - ◆ A rectangle creates individual cells or the table boundaries.
  - ◆ Horizontal lines create rows.
  - ◆ Vertical lines create columns.
  - ◆ Diagonal lines split cells.
- 4 If necessary, press and hold Shift, and then click one or more lines to erase them.
- 5 When you're done, click outside of the table.

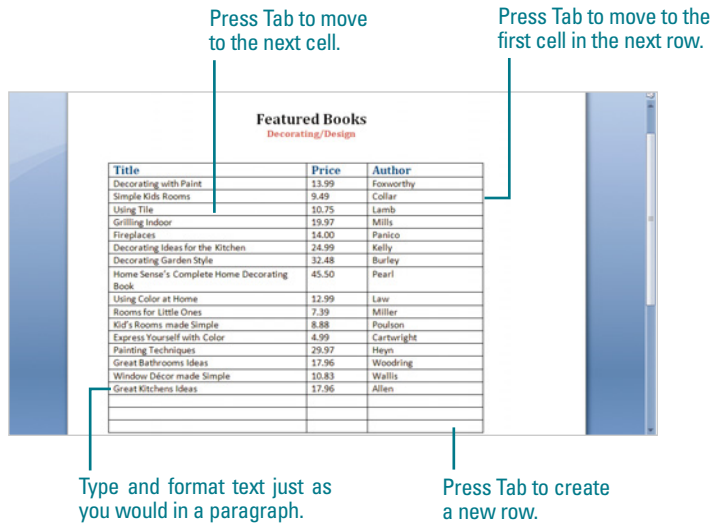


# Entering Text in a Table

## Enter Text and Move Around a Table

- The insertion point shows where text that you type will appear in a table. After you type text in a cell:
  - Press Enter to start a new paragraph within that cell.
  - Press Tab to move the insertion point to the next cell to the right (or to the first cell in the next row).
  - Press the arrow keys or click in a cell to move the insertion point to a new location.

Once you create your table, you enter text into cells just as you would in a paragraph, except pressing Tab moves you from cell to cell. As you type in a cell, text wraps to the next line, and the height of a row expands as you enter text that extends beyond the column width. The first row in the table is good for column headings, whereas the left-most column is good for row labels. Before you can modify a table, you need to know how to select the rows and columns of a table.



## Select Table Elements

Refer to this table for methods of selecting table elements, including:

- The entire table
- One or more rows and columns
- One or more cells

### Did You Know?

**You can delete contents within a cell.** Select the cells whose contents you want to delete, and then press Backspace or Delete.

## Selecting Table Elements

### To Select

### Do This

The entire table

Click next to the table, or click anywhere in the table, click the Layout tab under Table Tools, click the Select button, and then click Select Table.

One or more rows

Click in the left margin next to the first row you want to select, and then drag to select the rows you want.

One or more columns

Click just above the first column you want to select, and then drag with to select the columns you want, or click the Layout tab under Table Tools, click the Select button and then click Select Column or Select Row.

A single cell

Drag a cell or click the cell with .

More than one cell

Drag with to select a group of cells.

# Sorting Table Contents or Lists

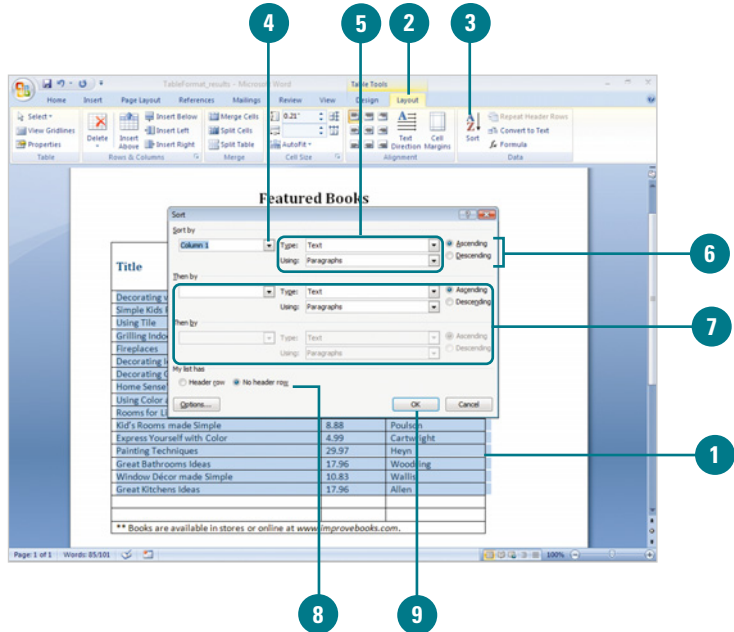
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## Sort Table Contents or Lists

- 1 Select the table column, adjacent columns, or list you want to sort.
- 2 Click the **Home** tab or the **Layout** tab under Table Tools.
- 3 Click the **Sort** button.
- 4 If necessary, click the **Sort by** list arrow, and then select a column name.
- 5 Click the **Type** list arrow, and then click table cell content type.
- 6 Click the **Ascending** or **Descending** option.
- 7 If necessary, click the second **Sort by** list arrow, select another column name, and then select the related sorting options you want.
- 8 Click the **Header row** or **No header row** option as it applies to the table.
- 9 Click **OK**.

After you enter contents in a table or create a bulleted or numbered list, you can reorganize the information by sorting the information. For example, you might want to sort information in a client list alphabetically by last name or numerically by their last invoice date. **Ascending order** lists information from A to Z, earliest to latest, or lowest to highest. **Descending order** lists information from Z to A, latest to earliest, or highest to lowest. You can sort a table columns based on one or more adjacent columns. A sort, for example, might be the telephone directory numerically by area code and then alphabetically by last name.



# Modifying a Table

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## Insert Additional Rows or Columns

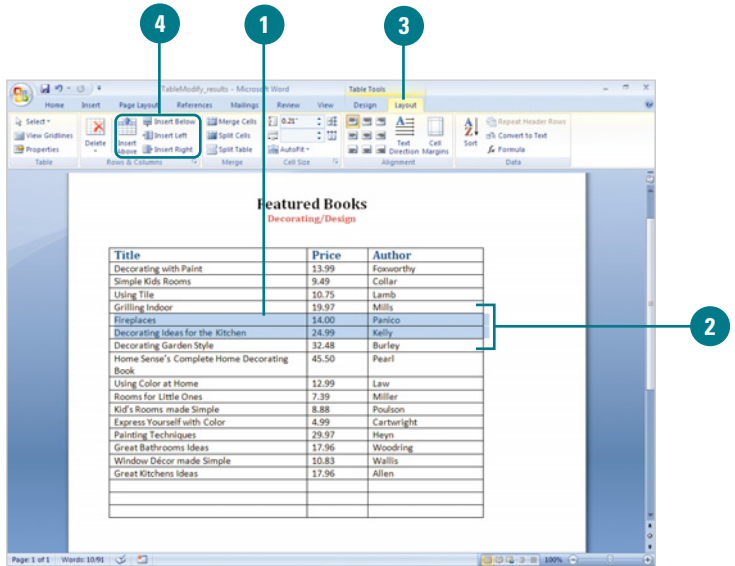
- 1 Select the row above which you want the new rows to appear, or select the column to the left of which you want the new columns to appear.
- 2 Drag to select the number of rows or columns you want to insert.
- 3 Click the **Layout** tab under Table Tools.
- 4 Click the Row & Column buttons you want:
  - ◆ Insert Above.
  - ◆ Insert Below.
  - ◆ Insert Left.
  - ◆ Insert Right.

### Did You Know?

**You can show or hide gridlines in a table.** Select the table you want to change, click the Layout tab under Table Tools, and then click View Gridlines to toggle it on and off.

**You can resize a table.** Drag a corner or middle resize handle to resize the table manually.

As you begin to work on a table, you might need to modify its structure by adding more rows, columns, or cells to accommodate new text, graphics, or other tables. The table realigns as needed to accommodate the new structure. When you insert rows, columns, or cells, the existing rows shift down, the existing columns shift right, and you choose what direction the existing cells shift. Similarly, when you delete unneeded rows, columns, or cells from a table, the table realigns itself.



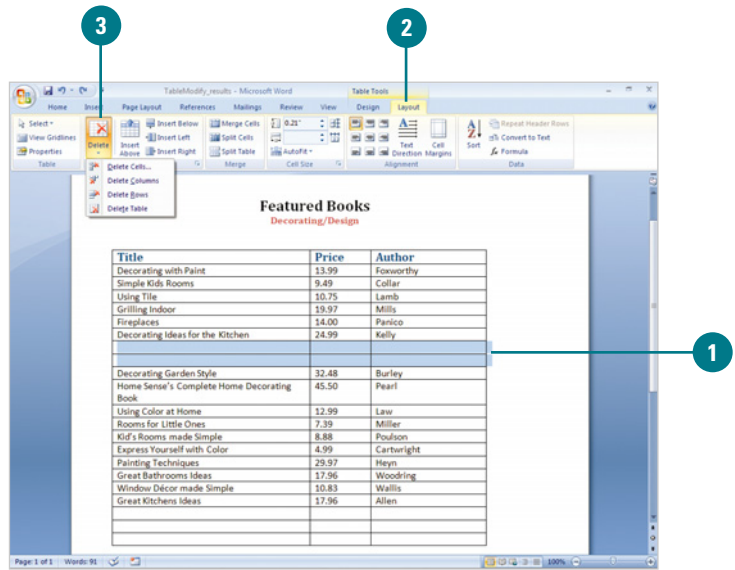
## Delete Table, Rows, Columns, or Cells

- 1 Select the rows, columns, or cells you want to delete.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Delete** button, and then click the delete option you want:
  - ◆ **Delete Cells.** Select the direction in which you want the remaining cells to shift to fill the space, and then click OK.
  - ◆ **Delete Columns.**
  - ◆ **Delete Rows.**
  - ◆ **Delete Table.**

### Did You Know?

**You can set column widths to fit text.** Word can set the column widths to fit the cells' contents or to fill the space between the document's margins. Click in the table, click the Layout tab under Table Tools, click the AutoFit button in the Cell Size group, and then click AutoFit to Contents or AutoFit to Window.

**You can evenly distribute columns and rows.** Select the columns or rows you want to distribute evenly in a table, click the Layout tab under Table Tools, and then click the Distribute Vertically or Distribute Horizontally button in the Cells Size group.



# Adjusting Table Cells

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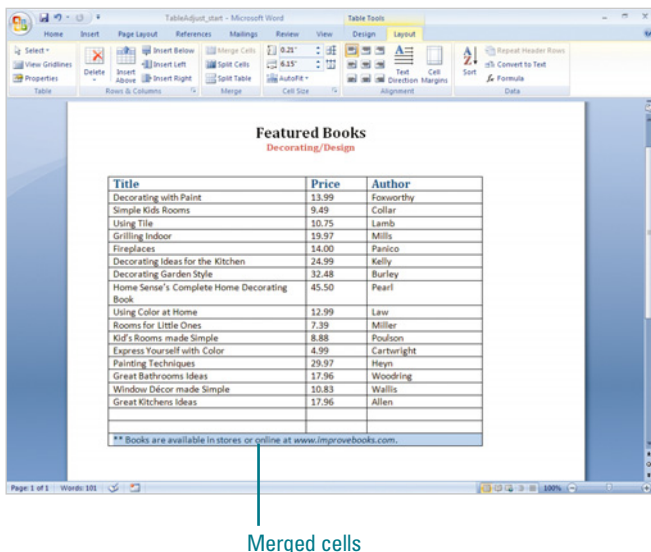
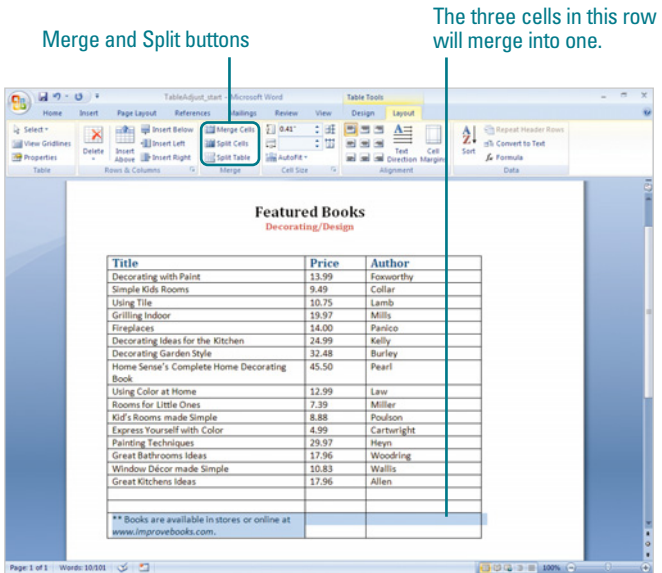
## Merge and Split Table Cells and Tables

- ◆ To merge two or more cells into a single cell, select the cells you want to merge, click the **Layout** tab under **Table Tools**, and then click the **Merge Cells** button.
- ◆ To split a cell into multiple cells, click the cell you want to split, click the **Layout** tab under **Table Tools**, and then click the **Split Cells** button. Enter the number of rows or columns (or both) you want to split the selected cell into, clear the **Merge cells before split** check box, and then click **OK**.
- ◆ To split a table into two tables separated by a paragraph, click in the row that you want as the top row in the second table, click the **Layout** tab under **Table Tools**, and then click the **Split Table** button.
- ◆ To merge two tables into one, delete the paragraph between them.

### Did You Know?

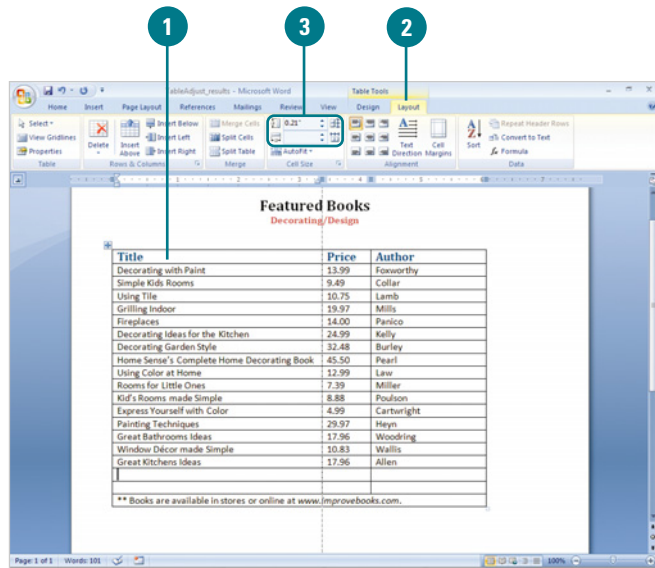
*You can quickly adjust columns and rows.* Position the pointer over the boundary of the column or row you want to adjust until it becomes a resize pointer. Drag the boundary to a new location.

Often there is more to modifying a table than adding or deleting rows or columns; you need to make cells just the right size to accommodate the text you are entering in the table. For example, a title in the first row of a table might be longer than the first cell in that row. To spread the title across the top of the table, you can merge (combine) the cells to form one long cell. Sometimes, to indicate a division in a topic, you need to split (or divide) a cell into two. You can also split one table into two at any row. Moreover, you can modify the width of any column and height of any row to better present your data.



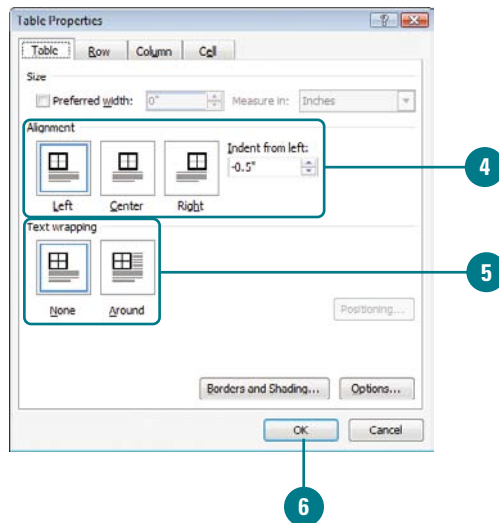
## Adjust Column Widths and Row Heights

- 1 Select the columns or rows you want to change.
- 2 Click the **Layout** tab under Table Tools.
- 3 Change the Height and Width boxes in the Cell Size group:
  - ◆ **Height.** To change the row height, enter a height in the Height box and then press Enter, or use the Up and Down arrows.
  - ◆ **Width.** To change the column width, enter a width in the Width box and then press Enter, or use the Up and Down arrows.



## Change Table Properties

- 1 Click in the table you want to change.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Properties** button.
- 4 On the Table tab, click an alignment option, and then specify an indent from the left (when you select the Left alignment option).
- 5 Click a text wrapping option.
- 6 Click **OK**.



# Aligning Table Cells

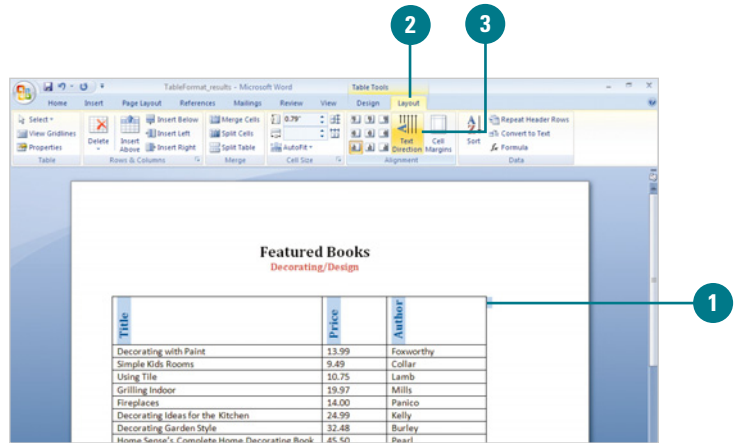
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## Change Text Direction Within Cells

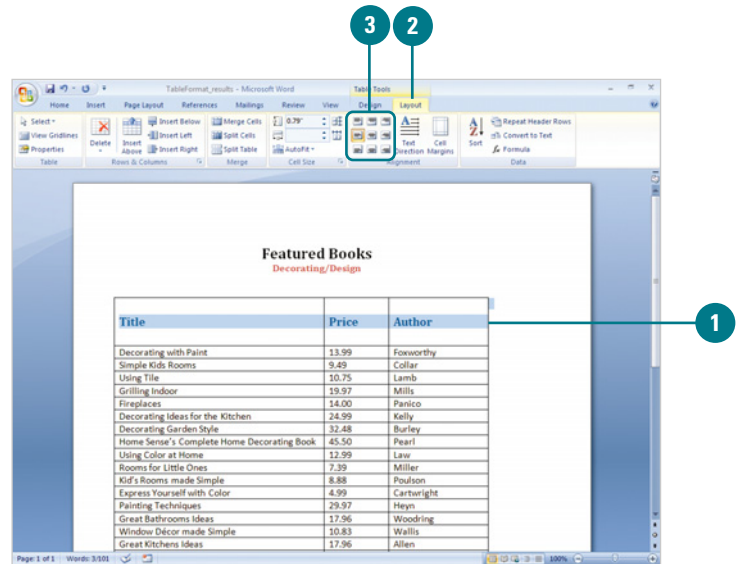
- 1 Select the cells you want to change.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Text Direction** button until the text is the direction you want.

Tables distinguish text from paragraphs. In turn, formatting, alignment, and text direction distinguish text in table cells. You can customize your table by realigning the cells' contents both horizontally and vertically, changing the direction of text within selected cells, such as the column headings, and resizing the entire table. You can also modify the appearance and size of the cells and the table.



## Align Text Within Cells

- 1 Select the cells, rows, or columns you want to align.
- 2 Click the **Layout** tab under Table Tools.
- 3 To align text in a cell, row or column, click one of the alignment buttons in the Alignment group.
- 4 To evenly distribute the height and width of the selected row and columns, select the row or column, and then click **Distribute Rows** or **Distribute Columns**.

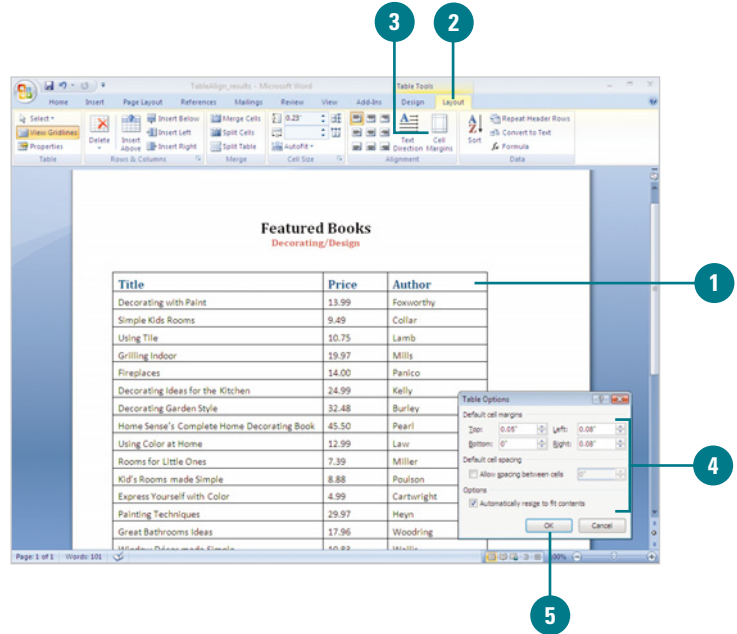


## Change Cells Margins

- 1 Select a cell in the table you want to change.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Cell Margins** button.
- 4 Specify cell margin sizes you want for the table.
- 5 Click **OK**.

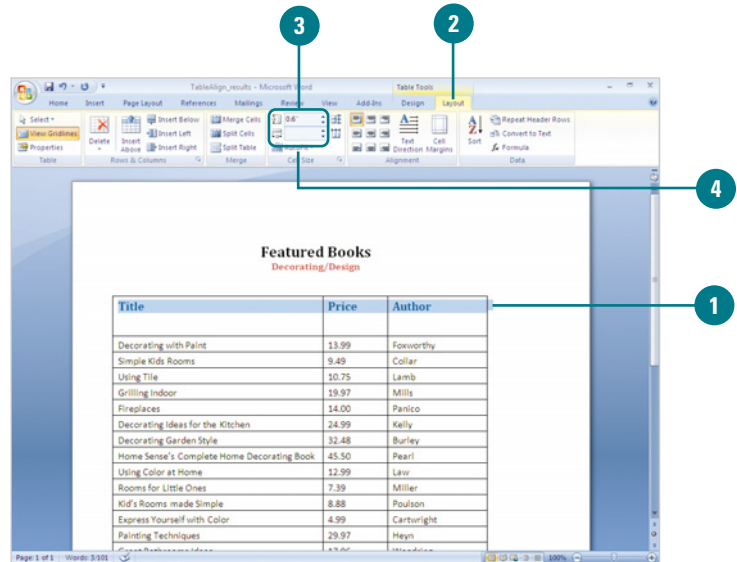
### Did You Know?

*You can create nested tables.* Select the table or cells, click the Home tab, click the Cut or Copy button, right-click the table cell, and then click Paste as Nested Table.



## Change Cell Sizes

- 1 Select the cells in the table you want to change.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Up** and **Down** arrows for the **Table Row Height** and **Table Column Width**.
- 4 To automatically adjust the column width based on the size of the text, click the **AutoFit** button, and then click **AutoFit Contents**, **AutoFit Window**, or **Fixed Column Width**.



# Adding a Quick Style to a Table

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## Add a Quick Style to a Table

- 1 Click the table you want to change, or select the cells you want to modify.
- 2 Click the **Design** tab under Table Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Table Styles group to see additional styles.

The current style appears highlighted in the gallery.

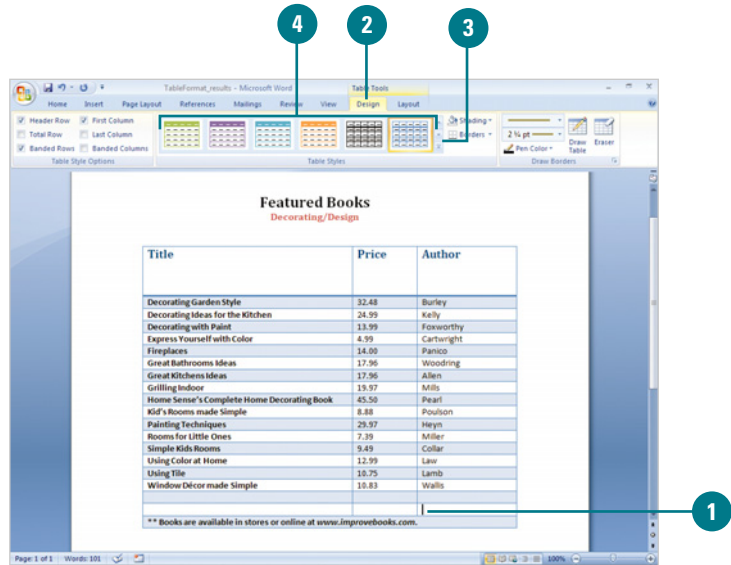
**TIMESAVER** Click the gallery title bar arrow to narrow down the list of styles: All, Document Matching, Light, Medium, or Dark.

- 4 Point to a style.
- 5 A live preview (**New!**) of the style appears in the current shape.
- 5 Click the style you want from the gallery to apply it to the selected table.

### Did You Know?

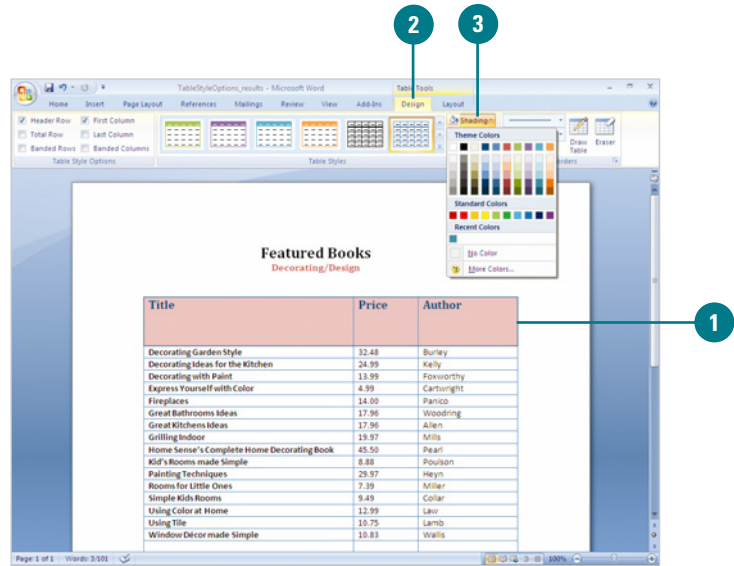
**You can clear table formatting.** Select the table you want to change, click the Design tab under Table Tools, click the More list arrow in the Table Styles group, and then click Clear Table.

Instead of changing individual attributes of a table, such as shape, border, and effects, you can quickly add them all at once with the Table Quick Style gallery. The Table Quick Style gallery (**New!**) provides a variety of different formatting combinations. To quickly see if you like a Table Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected shape. If you like the style, you can apply it. In addition to applying one of the preformatted table from the Table Quick Style gallery, you can also create your own style by shaping your text into a variety of shapes, curves, styles, and color patterns.



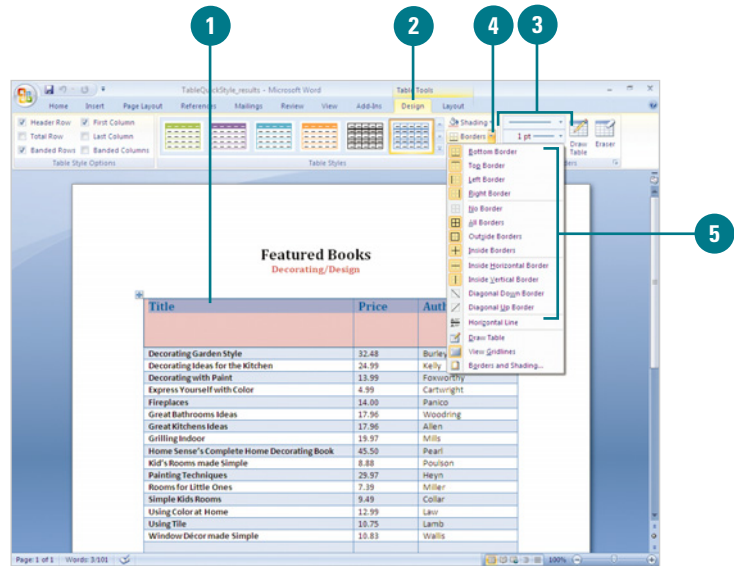
## Apply a Fill to a Table

- 1 Click the table you want to change, or select the cells you want to modify.
- 2 Click the **Design** tab under Table Tools.
- 3 Click the **Shading** button, and then click or point to one of the following:
  - ◆ **Color** to select a theme or standard color.
  - ◆ **No Color** to remove a color fill.
  - ◆ **More Colors** to select a standard or custom color (using the RGB or HSL model).



## Apply an Outline to a Table

- 1 Click the table you want to change, or select the cells you want to modify.
- 2 Click the **Design** tab under Table Tools.
- 3 Use the **Line Width**, **Line Style**, and **Pen Color** buttons to select the border attributes you want.
- 4 Click the **Border** button.
- 5 Click a border option, such as No Border, All Borders, Outside Borders, Inside Horizontal Border, Inside Vertical Border, Diagonal Down Border, or Diagonal Up Border.

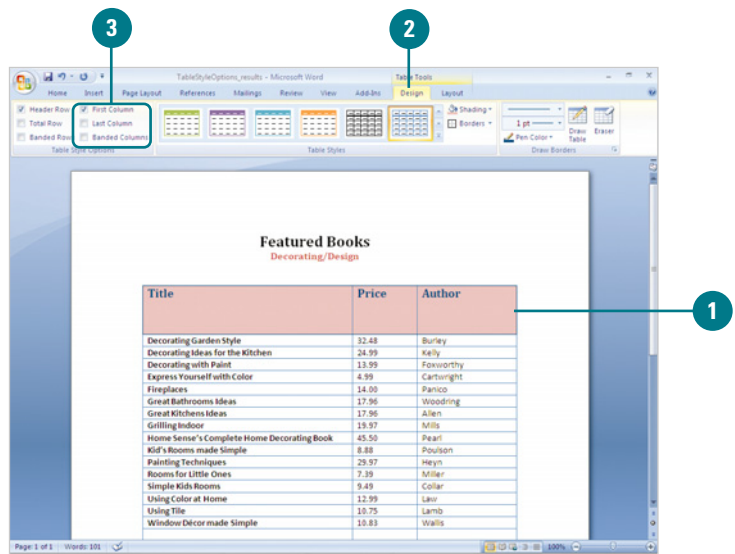


# Changing Table Style Options

## Change Table Columns Options

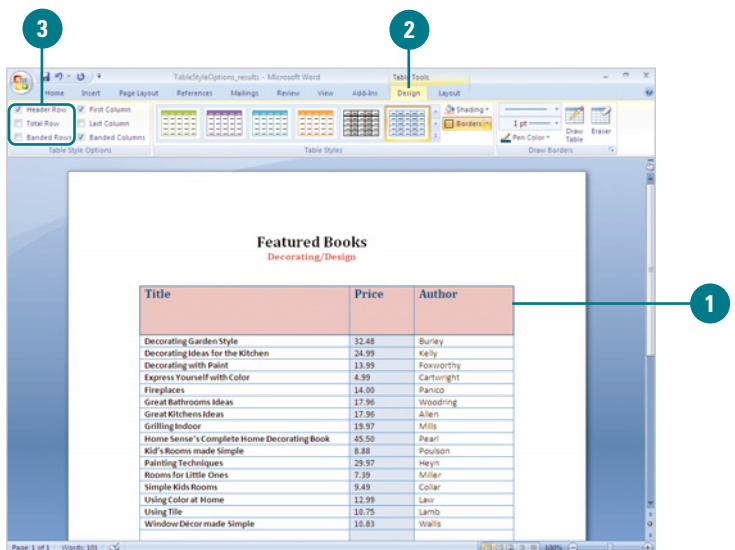
- 1 Click the table you want to change.
- 2 Click the **Design** tab under Table Tools.
- 3 Select any of the following row and column check box options:
  - ◆ **First Column** to format the first column of the table as special.
  - ◆ **Last Column** to format the last column of the table as special.
  - ◆ **Banded Column** to format even columns differently than odd columns.

When you create a table, you typically include a header row or first column to create horizontal or vertical headings for your table information. You can use Quick Style options (**New!**), such as a header or total row, first or last column, or banded rows and columns, to show or hide a special row and column formatting. The Total Row option displays a row at the end of the table for column totals. The Banded Row or Banded Column option formats even rows or columns differently from odd rows or columns to make a table easier to view.



## Change Table Rows Options

- 1 Click the table you want to change.
- 2 Click the **Design** tab under Table Tools.
- 3 Select any of the following row and column check box options:
  - ◆ **Header Row** to format the top row of the table as special.
  - ◆ **Total Row** to format the bottom row of the table for column totals.
  - ◆ **Banded Rows** to format even rows differently than odd rows.

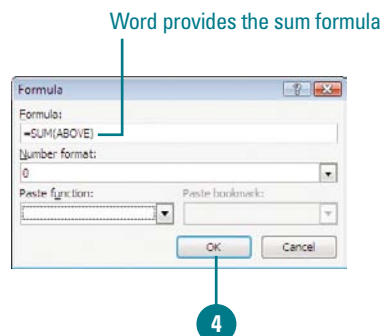
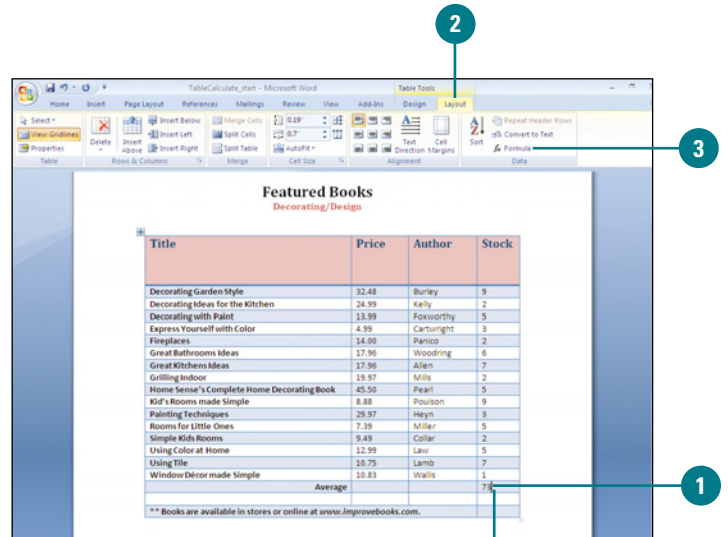


# Summing Table Rows and Columns

## Add the Contents of Rows and Columns

- 1 Click the cell in which you want the sum to appear.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Formula** button. If Word proposes a formula that you do not want to use, delete it from the Formula box.
  - ◆ If the cell you selected is at the bottom of a column of numbers, Microsoft Word proposes the formula =SUM(ABOVE).
  - ◆ If the cell you selected is at the right end of a row of numbers, Word proposes the formula =SUM(LEFT).
- 4 Click **OK**.

The fastest way to total the rows or columns of a table is by clicking the Formulas button on the Layout tab under Table Tools. The disadvantage of using this method is that if you subsequently edit the values in the rows and columns of the table, the sums will not automatically update. You would need to remember to click Formula again for each row and column that was updated. To ensure sum totals are automatically calculated anytime the data in a table changes, use the equation functions of Word.



# Calculating a Value in a Table

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## Calculate a Value

- 1 Click the cell in which you want the result to appear.
- 2 Click the **Layout** tab under Table Tools.
- 3 Click the **Formula** button. If Word proposes a formula that you do not want to use, delete it from the Formula box.
- 4 Click the **Paste Function** list arrow, and then select a function.
- 5 To reference the contents of a table cell, type the cell references in the parentheses in the formula. For instance, to average the values in cells a1 through a4, the formula would read =Average(a1,a4). If you are doing the average of a row in the last column of the row, simplify this to =Average(left).
- 6 In the Number format box, enter a format for the numbers. For example, to display the numbers as a decimal percentage, click 0.00%. For now, enter 0 to display the average as the nearest whole number. To display a true average, enter 0.00 in the Number Format box.
- 7 Click **OK**.

Sometimes the simple equations proposed by Word do not adequately cover what you are trying to calculate in the table. When that is the case, you need to create a custom equation to do the work. The Formula dialog box give you a choice of 18 paste functions to help you create your formula. Should you need help, you can activate Help to see examples of how to use each paste function, or for more complex formulas, try Microsoft's Online Community to look for advice from other users.

The screenshot shows a Microsoft Word document with a table titled "Featured Books" under the sub-heading "Decorating/Design". The table has four columns: Title, Price, Author, and Stock. The data is as follows:

Title	Price	Author	Stock
Decorating Garden Style	32.48	Burley	5
Decorating Ideas for the Kitchen	24.99	Kelly	2
Decorating with Paint	13.99	Foxworthy	5
Express Yourself with Color	4.99	Cartwright	3
Fireplaces	24.99	Parise	2
Great Bathrooms Ideas	17.96	Woodring	6
Great Kitchens Ideas	17.96	Allen	7
Grilling Indoor	15.97	Mills	2
Home Sense's Complete Home Decorating Book	45.99	Peard	5
Kid's Rooms made Simple	8.88	Poulson	9
Painting Techniques	29.97	Heyn	3
Rooms for Little Ones	7.39	Miller	5
Simple Kids Rooms	9.49	Collar	2
Using Color at Home	12.99	Law	5
Using Tile	10.75	Lamb	7
Window Décor made Simple	10.83	Walls	1
Average	17.63		73

Below the table, there is a note: "\*\* Books are available in stores or online at [www.improvebook.com](http://www.improvebook.com)."

The Formula dialog box is open, showing the formula =AVERAGE(ABOVE) in the Formula field. The Number format is set to 0.00. The Paste Function list is open, and the Average function is selected. The dialog box has OK and Cancel buttons.

Numbered callouts 1 through 7 are placed on the screenshot to indicate the steps described in the text:

- 1: Points to the cell in the last column of the table where the result is calculated.
- 2: Points to the Layout tab in the Table Tools ribbon.
- 3: Points to the Formula button in the Layout tab.
- 4: Points to the Paste Function list arrow in the Formula dialog box.
- 5: Points to the formula =AVERAGE(ABOVE) in the Formula field.
- 6: Points to the Number format dropdown menu in the Formula dialog box.
- 7: Points to the OK button in the Formula dialog box.

# Inserting and Creating a Chart

## Insert and Create a Chart

- 1 Click to place the insertion point where you want to insert a Chart.
- 2 Click the **Insert** tab.
- 3 Click the **Insert Chart** button.
- 4 Click a category in the left pane.
- 5 Click the chart type you want.
- 6 Click **OK**.

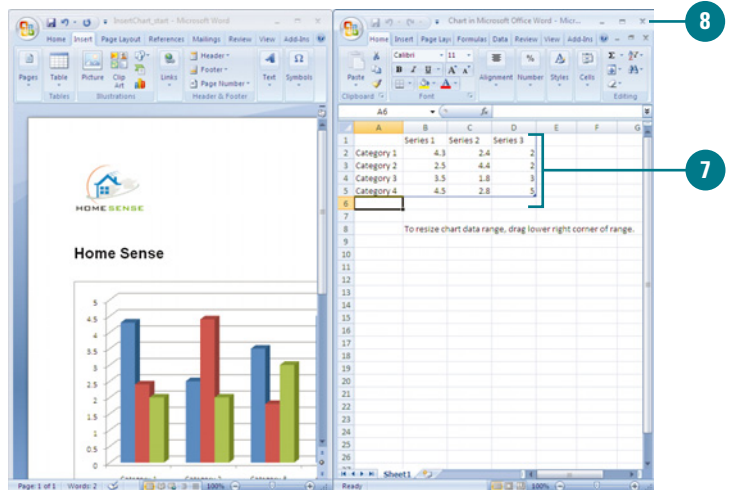
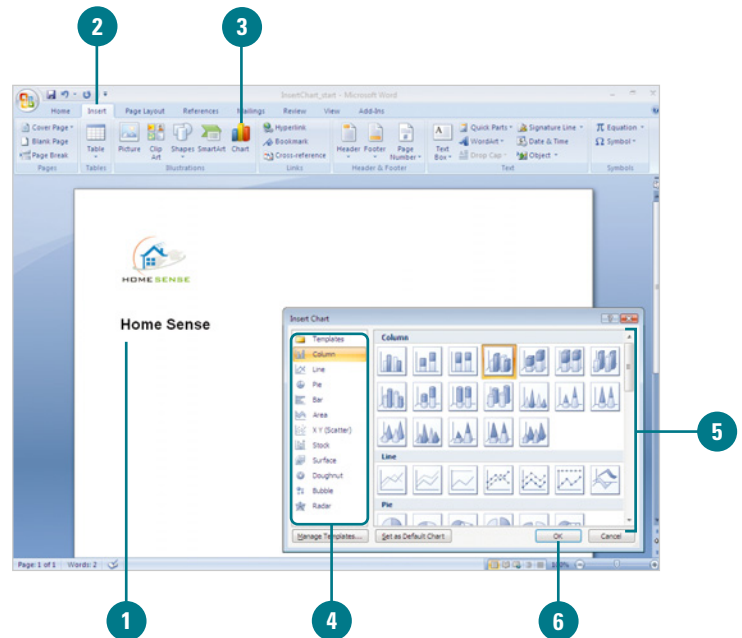
A Microsoft Excel worksheet opens and tiles next to your Word document, displaying a sample chart.

- 7 To create a chart, change the sample data in the Excel worksheet. You can enter, paste, or import data.
- 8 To close the worksheet and view the chart, click the **Close** button on the Excel worksheet and return to Word.

### Did You Know?

*Word 2007 uses Microsoft Office Excel 2007 to embed a chart.* Office programs (including Word) now use Microsoft Excel (**New!**) to embed and display a chart instead of Microsoft Graph.

A **chart** provides a visual, graphical representation of numerical data. Charts add visual interest and useful information represented by lines, bars, pie slices, or other markers. A group of data values from a worksheet row or column of data makes up a **data series**. Each data series has a unique color or pattern on the chart. Titles on the chart, horizontal (x-axis), and vertical (y-axis) identify the data. Gridlines are horizontal and vertical lines to help the reader determine data values in a chart. When you insert and create a chart in a document, the chart is an **embedded object** from Microsoft Office Excel 2007. You can then resize or move it just as you would any graphic object.



# Working with Chart Data

## Open and View Chart Data

- 1 Click the chart you want to modify.

A chart consists of the following elements.

- ◆ **Data markers.** A graphical representation of a data point in a single cell in the datasheet. Typical data markers include bars, dots, or pie slices.
- ◆ **Legend.** A pattern or color that identifies each data series.
- ◆ **X-axis.** A reference line for the horizontal data values.
- ◆ **Y-axis.** A reference line for the vertical data values.
- ◆ **Tick marks.** Marks that identify data increments.

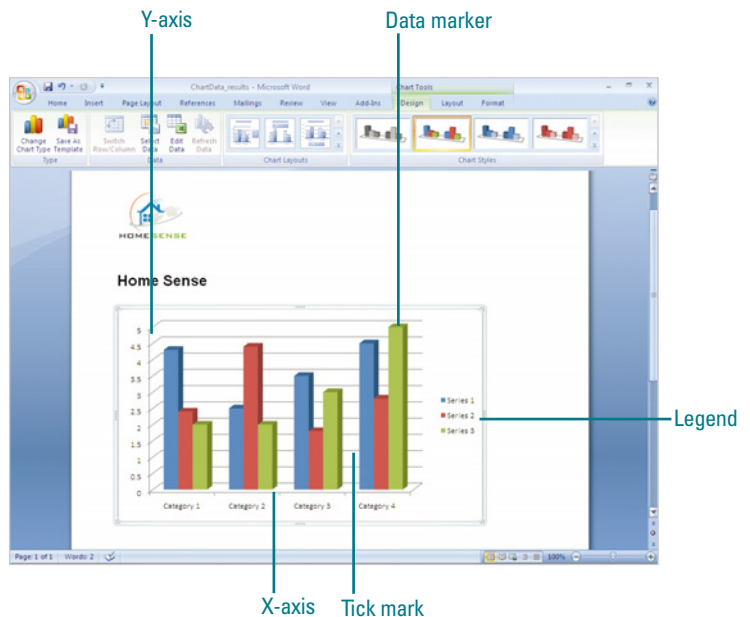
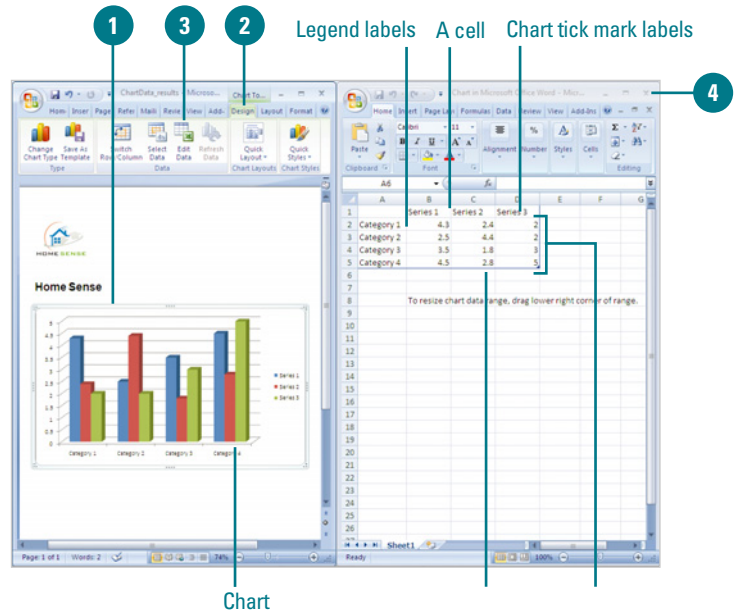
- 2 Click the **Design** tab under Chart Tools.

- 3 Click the **Edit Data** button.

A Microsoft Excel worksheet opens and tiles next to your Word document.

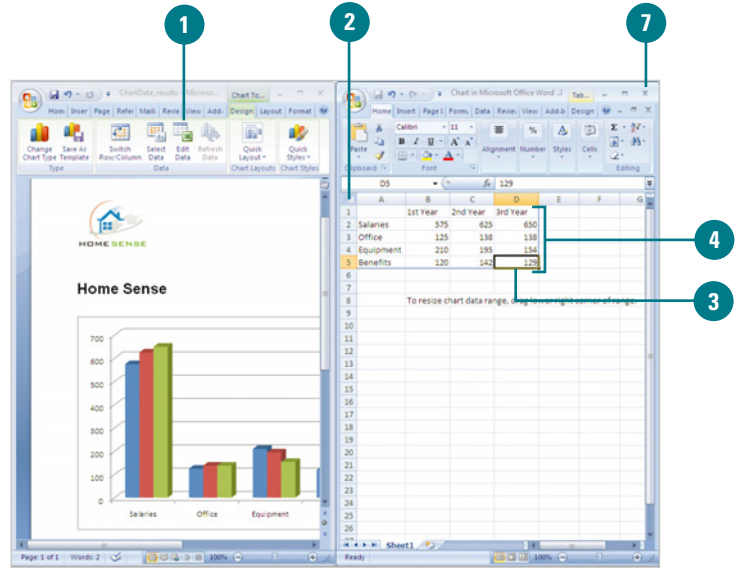
- 4 To close the worksheet and view the chart, click the **Close** button on the Excel worksheet and return to Word.

You can enter chart data in the Excel worksheet either by typing it or by inserting it from a different source. The worksheet is designed to make data entry easy, so direct typing is best when you're entering brief, simple data. For more complex or longer data, and when you're concerned about accuracy, insert and link your data to the chart. When you first insert a chart, the worksheet contains sample labels and numbers.

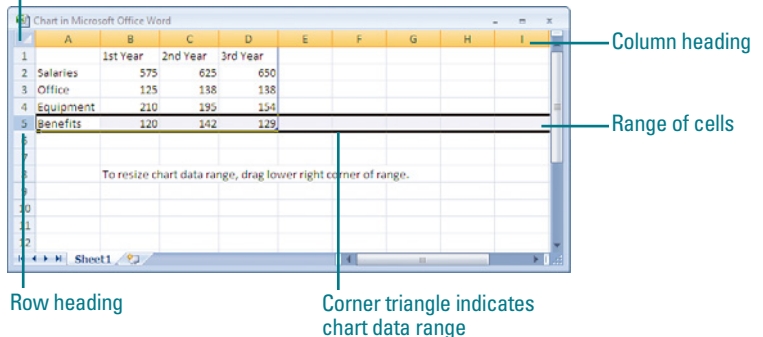


## Enter Data in the Worksheet

- 1 Click the chart you want to modify, and then click the **Edit Data** button on the Design tab under Chart Tools.
- 2 To delete the sample data, click the upper-left heading button to select all the cells, and then press Delete.
- 3 Use one of the following to select a cell, row, column, or datasheet.
  - ◆ To select a cell, click it.
  - ◆ To select an entire row or column, click the row heading or column heading button.
  - ◆ To select a range of cells, drag the pointer over the cells you want to select, or click the upper-left cell of the range, press and hold Shift, and then click the lower-right cell. When you select a range of cells, the active cell is white, and all other selected cells are outlined in black.
- 4 Type the data you want to enter in the cell.
- 5 Press Enter to move the insertion point down one row or press Tab to move the insertion point right to the next cell.
- 6 If necessary, select the data you want for the chart, click the Design tab, click the **Resize Table** button, and then click **OK**.
- 7 To close the worksheet and view the chart, click the **Close** button on the Excel worksheet and return to Word.



Click to select the entire worksheet



# Changing a Chart Type

## Change a Chart Type for an Entire Chart

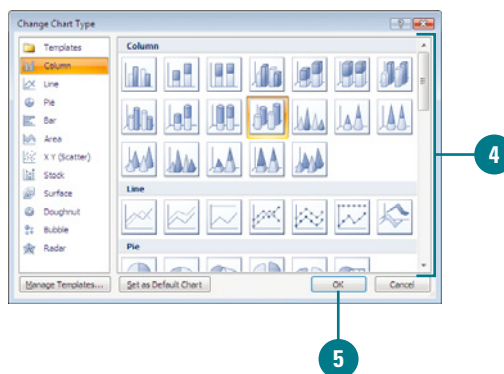
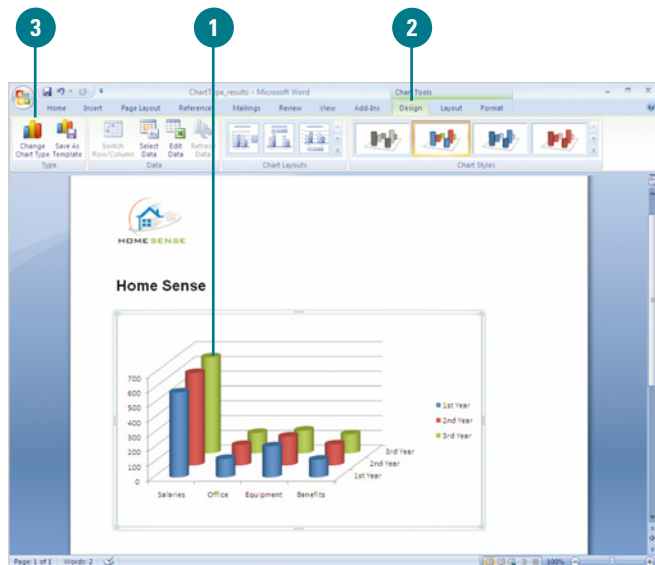
- 1 Select the chart you want to change.
- 2 Click the **Design** tab under Chart Tools.
- 3 Click the **Change Chart Type** button.
- 4 Click the chart type you want.
- 5 Click **OK**.

### Did You Know?

**You can reset chart formatting.** Click the chart you want to reset, click the Format tab under Chart Tools, and then click the Reset to Match Style button.

**You can delete a chart.** Click the chart object, and then press Delete.

Your chart is what your reader sees, so make sure to take advantage of the pre-built chart layouts and styles (**New!**) to make the chart appealing and visually informative. Start by choosing the chart type that is best suited for presenting your data. There are a wide variety of chart types, available in 2-D and 3-D formats, from which to choose. For each chart type, you can select a predefined chart layout and style to apply the formatting you want. If you want to format your chart beyond the provided formats, you can customize a chart. Save your customized settings so that you can apply that chart formatting to any chart you create. You can change the chart type for the entire chart, or you can change the chart type for a selected data series to create a combination chart.

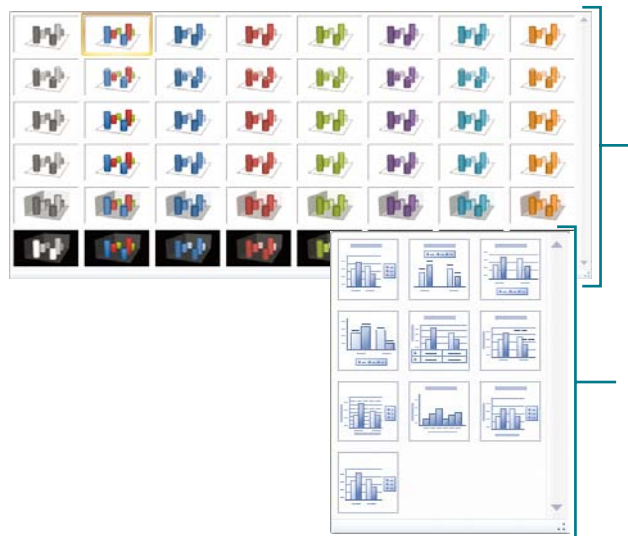
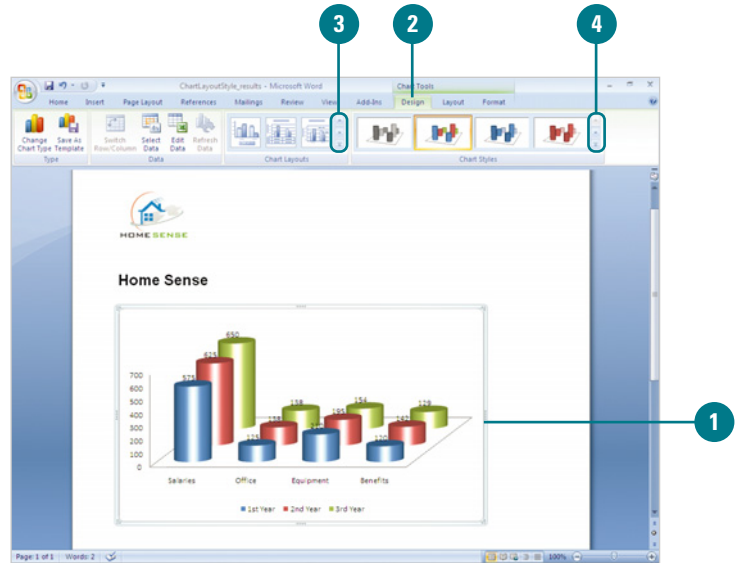


# Changing a Chart Layout and Style

## Change a Chart Layout or Style

- 1 Select the chart you want to change.
- 2 Click the **Design** tab under Chart Tools.
- 3 To change the chart layout, click the scroll up or down arrow, or click the **More** list arrow in the Chart Layouts group, and then click the layout you want.
- 4 To change the chart style, click the scroll up or down arrow, or click the **More** list arrow in the Chart Styles group, and then click the chart style you want.

Office's pre-built chart layouts and styles (**New!**) can make your chart more appealing and visually informative. Start by choosing the chart type that is best suited for presenting your data. There are a wide variety of chart types, available in 2-D and 3-D formats, from which to choose. For each chart type, you can select a predefined chart layout and style to apply the formatting you want. If you want to format your chart beyond the provided formats, you can customize a chart. Save your customized settings so that you can apply that chart formatting to any chart you create.



# Changing Chart Titles

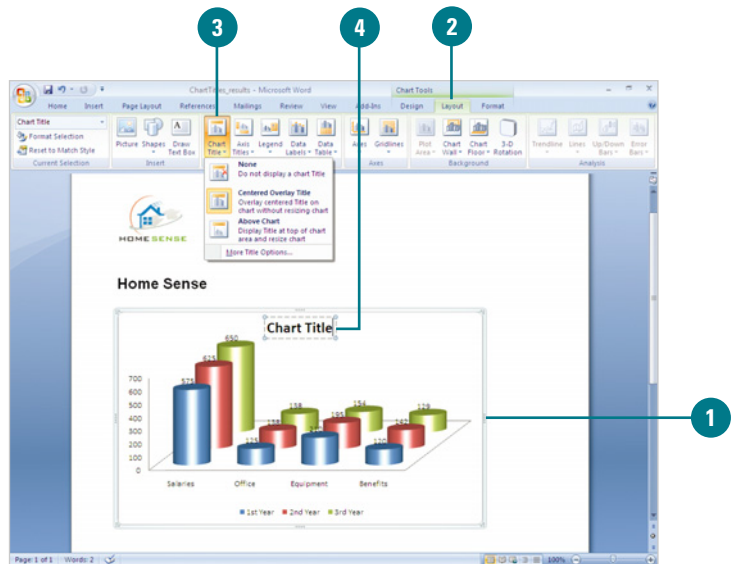
## Change Chart Title

- 1 Select the chart you want to modify.
- 2 Click the **Layout** tab under Chart Tools.
- 3 Click **Chart Titles** button, and then click one of the following:
  - ◆ **None** to hide the chart title.
  - ◆ **Centered Overlay Title** to insert a title on the chart without resizing it.
  - ◆ **Above Chart** to position the chart title at the top of the chart and resize it.
  - ◆ **More Title Options** to set custom chart title options.
- 4 Double-click the text box to place the insertion point, and then modify the text.

### Did You Know?

**You can link a chart or axis title to a worksheet cell.** On the chart, click the chart or axis title you want to link, click in the formula bar, type equal sign (=), select the worksheet cell that contains the data or text you want to display in the chart, and then press Enter.

The layout of a chart typically comes with a chart title, axis titles, and a legend. However, you can also include other elements, such as data labels, and a data table. You can show, hide, or change the positions of these elements to achieve the look you want. The chart title typically appears at the top of the chart. However, you can change the title position to appear as an overlap text object on top of the chart. When you position the chart title as an overlay, the chart is resized to the maximum allowable size. In the same way, you can also reposition horizontal and vertical axis titles to achieve the best fit in a chart. If you want a more custom look, you can set individual options using the Format dialog box.

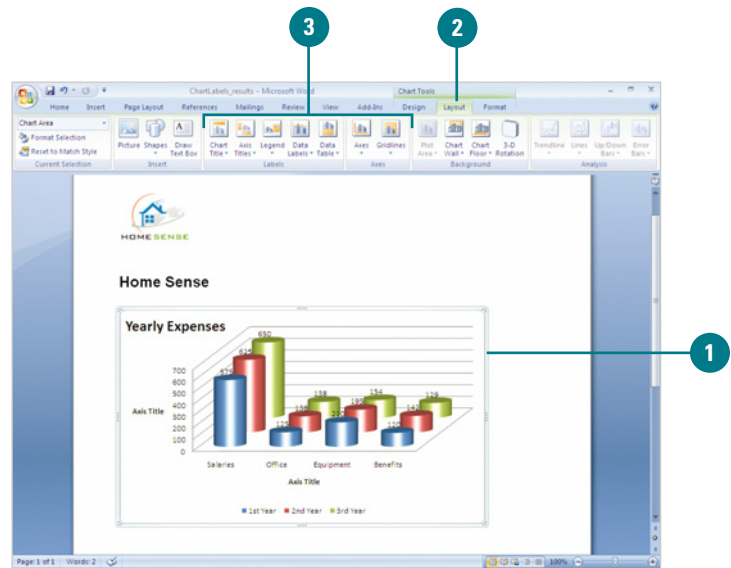


# Changing Chart Labels

## Change the Chart Legend, Data Labels, and Axis Titles

- 1 Select the chart you want to modify.
- 2 Click the **Layout** tab under Chart Tools.
- 3 Click any of the following label buttons:
  - ◆ **Chart Title.** Click to add, remove, or position a chart title.
  - ◆ **Axis Titles.** Click to add or remove an axis title on the chart.
  - ◆ **Legend.** Click to select a legend position on the chart.
  - ◆ **Data Labels.** Click to show or hide data labels on the chart for each data series.
  - ◆ **Data Table.** Click to show or hide a table next to the chart with the chart data.
  - ◆ **Axes.** Click to show, hide, or position axis labels or tick marks.
  - ◆ **Gridlines.** Click to show or hide major or minor gridlines.

A **legend** is a set of text labels that helps the reader connect the colors and patterns in a chart with the data they represent. Legend text is derived from the data series plotted within a chart. You can rename an item within a legend by changing the text in the data series. If the legend chart location doesn't work with the chart type, you can reposition the legend at the right, left, top or bottom of the chart or overlay the legend on top of the chart on the right or left side. **Data labels** show data values in the chart to make it easier for the reader to see, while a Data table shows the data values in an associated table next to the chart. If you want a customized look, you can set individual options using the Format dialog box. In addition, you can change the label display for axes and show or hide major or minor gridlines.

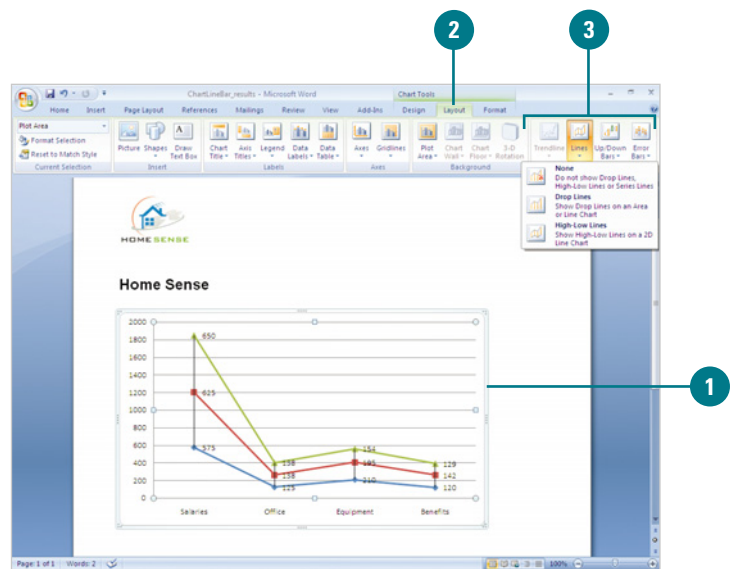


# Formatting Line and Bar Charts

## Format Line and Bar Charts

- 1 Select the line or bar chart you want to modify.
- 2 Click the **Layout** tab under Chart Tools.
- 3 In the Analysis group, click any of the following:
  - ◆ **Trendline** to remove or add different types of trendlines: Linear, Exponential, Linear Forecast, and Two Period Moving Average.
  - ◆ **Lines** to hide Drop Lines, High-Low Lines or Series Lines, or show series lines on a 2-D stacked Bar/Column Pie or Pie or Bar of Pie chart.
  - ◆ **Up/Down Bars** to hide Up/Down Bars, or show Up/Down Bars on a line chart.
  - ◆ **Error Bars** to hide error bars or show error bars with using Standard Error, Percentage, or Standard Deviation.

If you're using a line or bar chart, you can add trendlines, series lines, drop lines, high-low lines, up/down bars, or error bars with different options to make the chart easier to read. **Trendlines** are graphical representations of trends in data that you can use to analyze problems of prediction. For example, you can add a trendline to forecast a trend toward rising revenue. **Series lines** connect data series in 2-D stacked bar and column charts. **Drop lines** extend a data point to a category in a line or area chart, which makes it easy to see where data markers begin and end. **High-low lines** display the highest to the lowest value in each category in 2-D charts. Stock charts are examples of high-low lines and up/down bars. **Error bars** show potential error amounts graphically relative to each data marker in a data series. Error bars are usually used in statistical or scientific data.



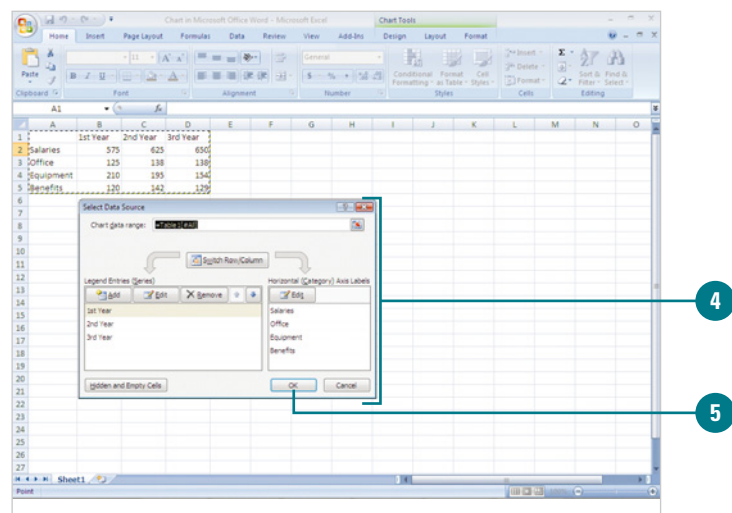
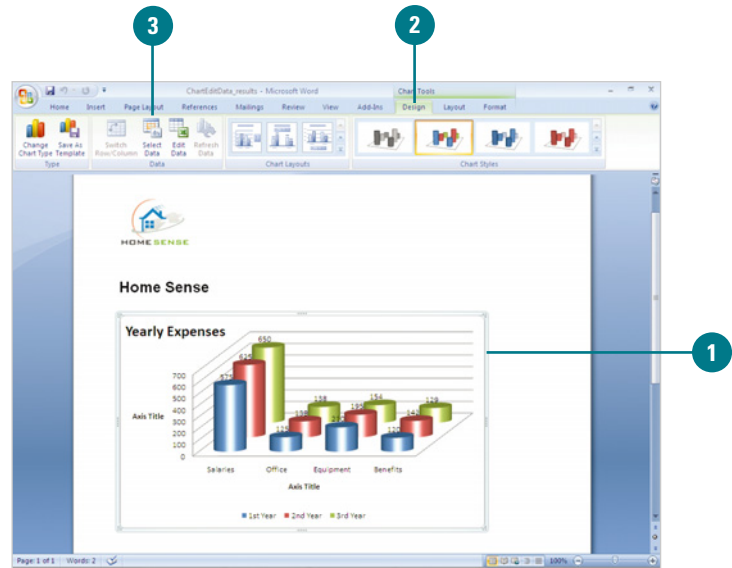
# Editing Chart Data



## Edit the Data Source

- 1 Click the chart you want to modify.
- 2 Click the **Design** tab under Chart Tools.
- 3 Click the **Select Data** button on the Design tab under Chart Tools.
- 4 In the Select Data Source dialog box, use any of the following:
  - ◆ **Chart data range.** Displays the data range of the plotted chart.
  - ◆ **Switch Row/Column.** Click to switch plotting the data series from rows or columns.
  - ◆ **Add.** Click to add a new Legend data series to the chart.
  - ◆ **Edit.** Click to make changes to a Legend or Horizontal series.
  - ◆ **Remove.** Click to remove the selected Legend data series.
  - ◆ **Move Up and Move Down.** Click to move a Legend data series up or down in the list.
  - ◆ **Hidden and Empty Cells.** Click to plot hidden data and determine what to do with empty cells.
- 5 Click **OK**.

You can edit chart data in a worksheet one cell at a time, or you can manipulate a range of data. If you're not sure what data to change to get the results you want, use the Edit Data Source dialog box to help you. You can work with data ranges by series, either Legend or Horizontal. The Legend series is the data range displayed on the axis with the legend, while the Horizontal series is the data range displayed on the other axis. Use the Collapse Dialog button to temporarily minimize the dialog to select the data range you want. After you select your data, click the Expand Dialog button to return back to the dialog box.



# Saving a Chart Template

## Create a Custom Chart Template

- 1 Click the chart you want to save as a template.
- 2 Click the **Design** tab under Chart Tools.
- 3 Click the **Save As Template** button.
- 4 Make sure the Charts folder appears in the Save in box.

Microsoft Office templates are typically stored in the following location:

**Windows Vista.** C:/Users/*your name*/AppData/Microsoft/Roaming/Templates/Charts

**Windows XP.** C:/Documents and Settings/*your name*/Application Data/Microsoft/Templates/Charts

- 5 Type a name for the chart template.
- 6 Click **Save**.

A chart template file (.crtx) (**New!**) saves all the customization you made to a chart for use in other documents. You can save any chart in a document as a chart template file and use it to form the basis of your next document chart, which is useful for standard company financial reporting. Although you can store your template anywhere you want, you may find it handy to store it in the Templates/Charts folder that Microsoft Office uses to store its templates. If you store your design templates in the Templates/Charts folder, those templates appear as options when you insert or change a chart type using My Templates (**New!**). When you create a new chart or want to change the chart type of an existing chart, you can apply a chart template instead of re-creating it.

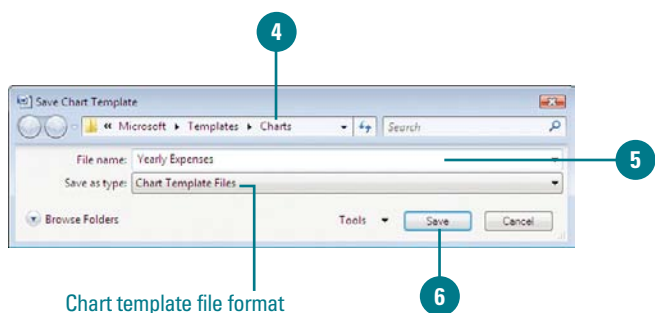
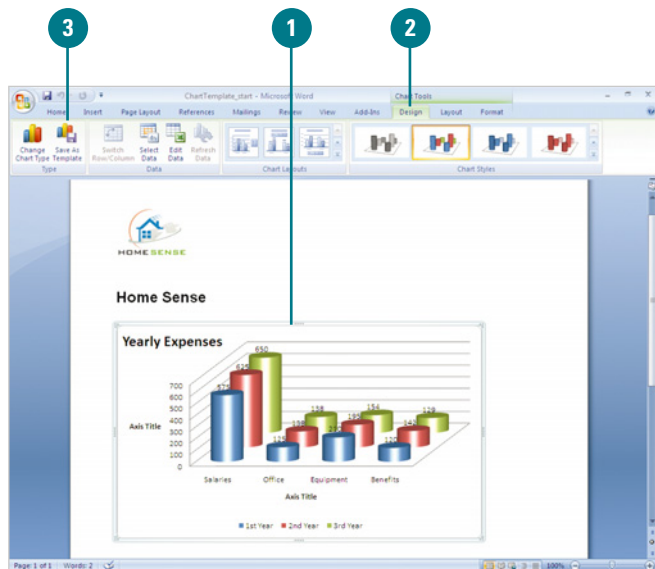


Chart template file format

# Creating Desktop Publishing Documents

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## Introduction

When you want to add objects to a document, you can use Microsoft Office Word as a drawing package. Word provides a wide range of predesigned shapes, line options or freeform tools that allow you to draw, size, and format your own shapes and forms.

You can add several types of drawing objects to your documents—shapes, text boxes, lines, and freeforms. **Shapes** are preset objects, such as stars, circles, or ovals. **Text boxes** are objects with text, a shape without a border. **Lines** are simply the straight or curved lines (arcs) that can connect two points or are used as arrows. **Freeforms** are irregular curves or polygons that you can create as a freehand drawing.

Once you create a drawing object, you can move, resize, nudge, copy or delete it on your documents. You can also change its style by adding color, creating a fill pattern, rotating it, and applying a shadow or 3-D effect. Take a simple shape and by the time you are done adding various effects, it could become an attractive piece of graphic art for your document. If you'd like to use it later, you can save it to the Clip Organizer.

Object placement on your documents is a key factor to successfully communicating your message. To save time and effort, multiple objects should be grouped if they are to be considered one larger object. Grouping helps you make changes later on, or copy your objects to another document. Word has the ability to line up your objects with precision—rulers and grids are part of the alignment process to help you. By grouping and aligning, you are assured that your drawing objects will be accurately placed.

# 7

## What You'll Do

**Add Desktop Publishing Effects**

**Add a Watermark**

**Add Page Backgrounds**

**Arrange Text in Columns**

**Wrap Text Around an Object**

**Work with Text Boxes**

**Draw and Resize Shapes**

**Add Text to a Shape**

**Create and Edit Freeforms**

**Add a Quick Style to a Shape**

**Add Formatting to Shape Text**

**Apply Colors Fill**

**Apply Picture, Texture, and Gradient Fills**

**Apply Shape Effects**

**Distribute Objects and Align to Grids and Guides**

**Change Stacking Order**

**Rotate and Flip Objects**

**Group and Ungroup Objects**

# Adding Desktop Publishing Effects

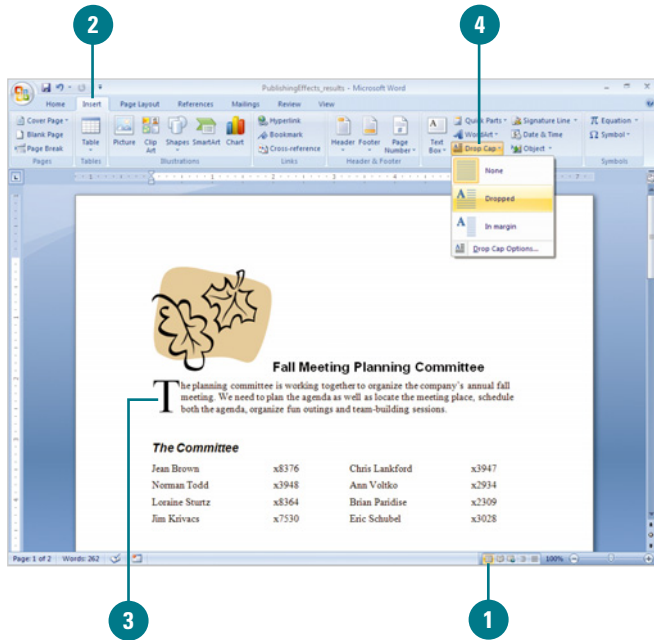
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## Add a Drop Cap

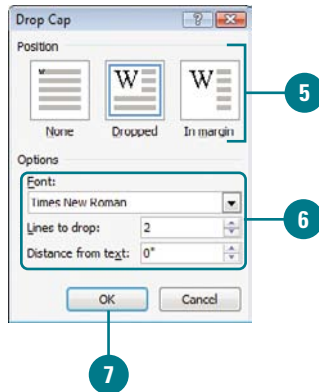
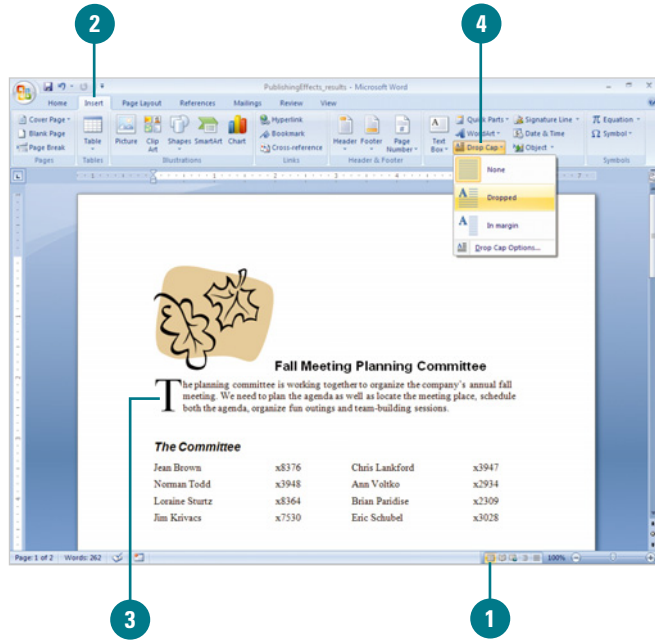
- 1 Click the **Print Layout View** button.
- 2 Click the **Insert** tab.
- 3 Click the paragraph where you want the drop cap.
- 4 Click the **Drop Cap** button, and then select the drop cap style you want.

A few simple elements—drop caps, borders, and shading—make your newsletters and brochures look like a professional produced them. A **drop cap** is the enlarged first letter of a paragraph that provides instant style to a document. Instead of using a desktop publishing program to create a drop cap effect, you can quickly achieve the same thing in Word. You can change the drop cap position, font, and height, and then enter the distance between the drop cap and paragraph.



## Customize a Drop Cap

- 1 Click the **Print Layout View** button.
- 2 Click the **Insert** tab.
- 3 Click the paragraph with the drop cap.
- 4 Click the **Drop Cap** button, and then click **Drop Cap Options**.
- 5 Click a drop cap position.
- 6 Change the drop cap font and height, and then enter the distance between the drop cap and text.
- 7 Click **OK**.



# Adding a Watermark

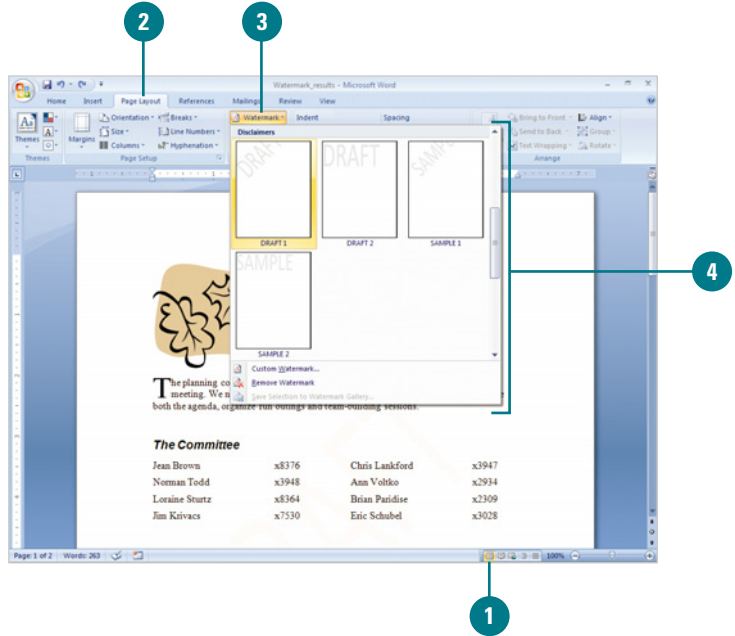
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## Add or Remove a Watermark

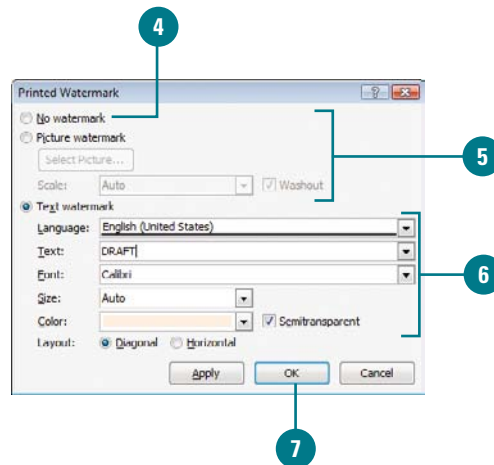
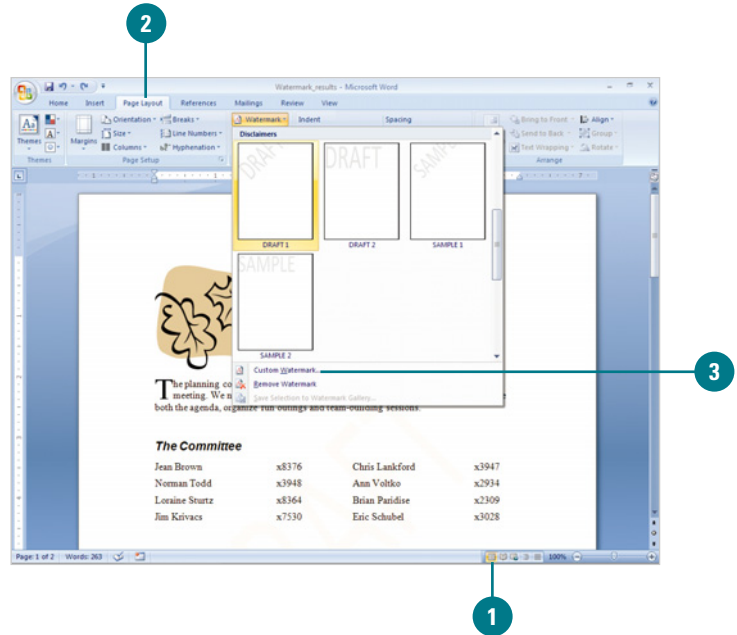
- 1 Click the **Print Layout View** button.
- 2 Click the **Page Layout** tab.
- 3 Click the **Watermark** button.
- 4 Do one of the following:
  - ◆ **Add.** Click the border you want to add.
  - ◆ **Remove.** Click **Remove Page Border**.

A **watermark** is a background effect—some text or a graphic, that prints in a light shade behind your text on your document. You can use a washed out version of your company logo, or you can add text such as **SAMPLE**, **DRAFT**, **PROPOSAL**, or **CONFIDENTIAL**. If you decide to change your watermark, it's as easy as typing in some new text.



## Customize or Remove a Watermark

- 1 Click the **Print Layout View** button.
- 2 Click the **Page Layout** tab.
- 3 Click the **Watermark** button, and then click **Custom Watermark**.
- 4 To remove a watermark, click the **No watermark** option.
- 5 To insert a picture as a watermark, click the **Picture watermark** option, click **Select Picture**, select a picture, and then click **OK**.
- 6 To customize watermark text, click the **Text watermark** option, select the settings you want.
- 7 Click **OK**.



# Adding Page Backgrounds

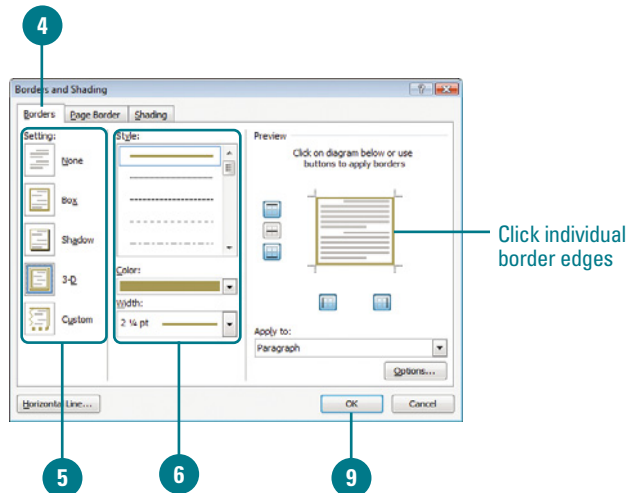
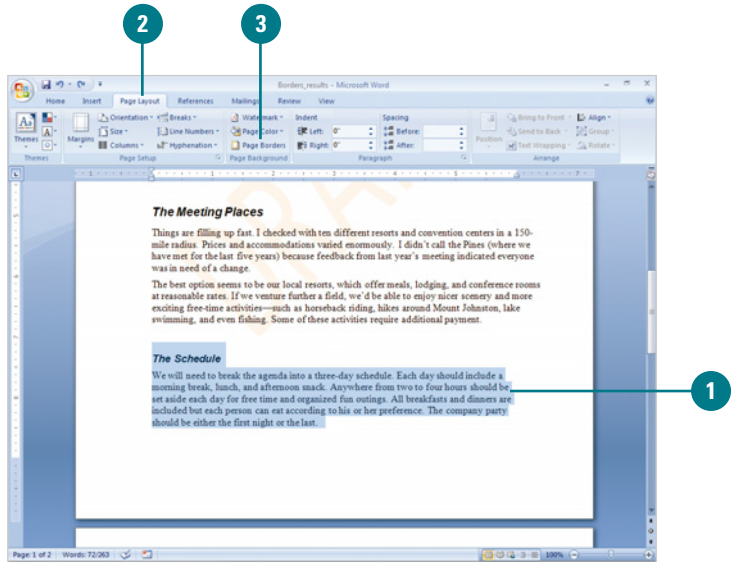
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## Add Borders and Shading

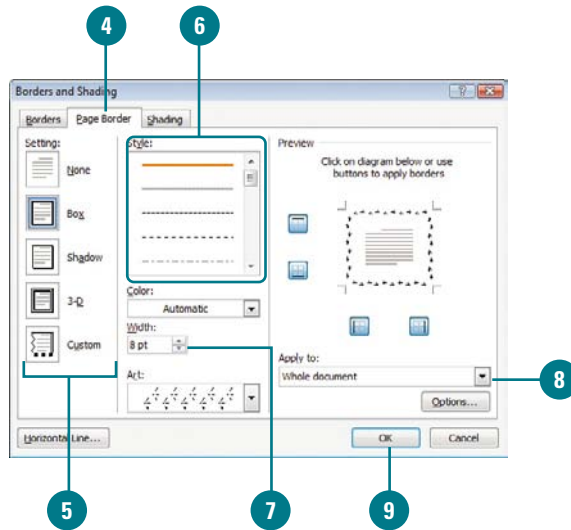
- 1 Select the text you want to have a border.
- 2 Click the **Page Layout** tab.
- 3 Click the **Page Borders** button.
- 4 Click the **Borders** tab.
- 5 Do one of the following:
  - ◆ Click a box setting to modify all border edges.
  - ◆ Click the edge in the diagram to modify individual border edges.
- 6 Click a border style, color, and width.
- 7 Click the **Shading** tab.
- 8 Click the **Fill** list arrow, and then click a fill color.
- 9 Click **OK**.

**Borders** are lines or graphics that appear around a page, paragraph, selected text, or table cells. With borders, you can change the line style, width, and colors, and you can add shadows and 3D effects. In addition to a page border, you can also change the page color. If you apply a theme color as the page color, it changes if you change the document theme. **Shading** is a color that fills the background of selected text, paragraphs, or table cells. For more attractive pages, add clips or columns.



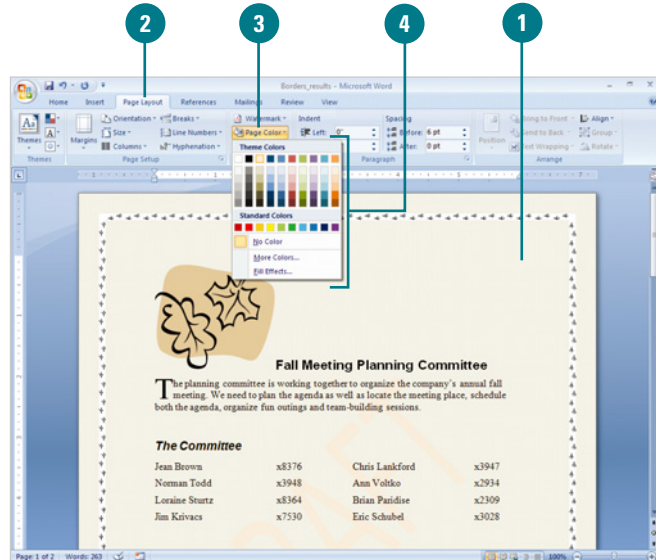
## Add or Remove a Page Border

- 1 Click the page you want to have a border.
- 2 Click the **Page Layout** tab.
- 3 Click the **Page Borders** button.
- 4 Click the **Page Border** tab.
- 5 Click a box setting.
- 6 Click a line style, or click the Art list arrow, and then select a line or art style.
- 7 Click a **Width** list arrow, and then select a width.
- 8 Click the **Apply to** list arrow, and then select the pages you want to have borders.
- 9 Click **OK**.



## Add Page Color

- 1 Click the page you want to have a border.
- 2 Click the **Page Layout** tab.
- 3 Click the **Page Color** button.
- 4 Do one of the following:
  - ◆ **Add**. Click the color you want to add.
  - ◆ **Remove**. Click **No Color**.



# Arranging Text in Columns

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## Create Columns

- 1 Click the **Page Layout** tab.
- 2 Select the text you want to arrange in columns.
- 3 Click the **Columns** button.
- 4 Select the number of columns you want.

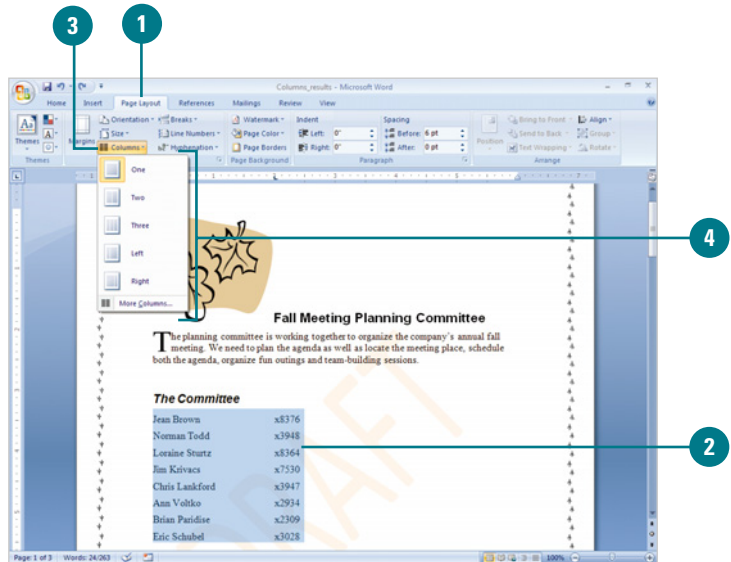
### Did You Know?

**You can remove columns quickly.**

Select the columns, click the Columns button on the Page Layout tab, and then click the first column.

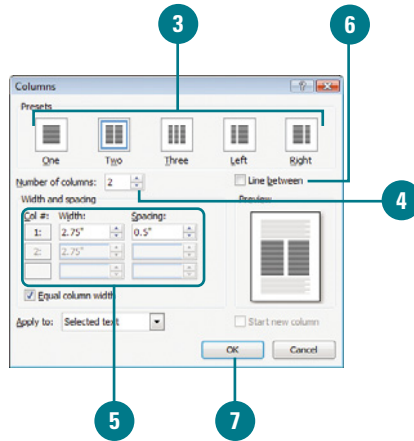
**You can align text in a column.** Click the Align Left, Center, Align Right, or Justify button on the Home tab to align paragraphs in columns.

Newspaper-style columns can give newsletters and brochures a more polished look. You can format an entire document, selected text, or individual sections into columns. You can create one, two, or three columns of equal size. You can also create two columns and have one column wider than the other. Word fills one column with text before the other, unless you insert a column break. **Column breaks** are used in two-column layouts to move the text after the insertion point to the top of the following column. You can also display a vertical line between the columns. To view the columns side by side, switch to print layout view.



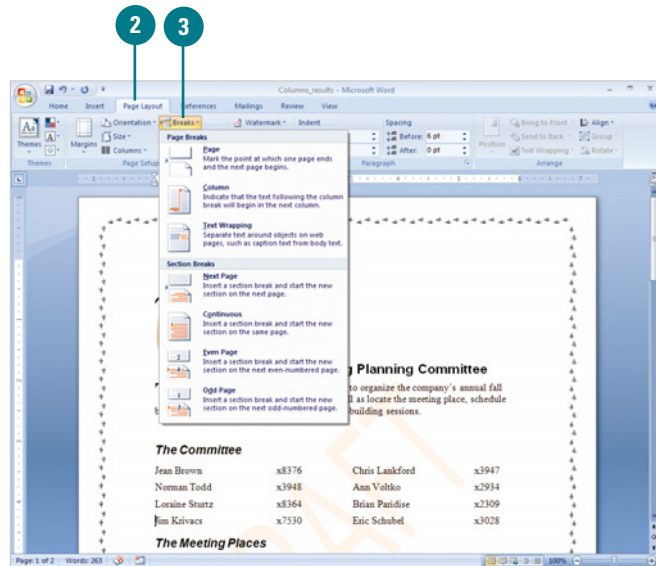
## Modify Columns

- 1 Click the **Page Layout** tab, and then click in the columns you want to modify.
- 2 Click the **Columns** button, and then click **More Columns**.
- 3 Click a column preset format.
- 4 If necessary, enter the number of columns you want.
- 5 Enter the width and spacing you want for each column.
- 6 To place a vertical line between columns, select the **Line between** check box.
- 7 Click **OK**.



## Insert a Column Break

- 1 Click where you want to insert a column break.
- 2 Click the **Page Layout** tab.
- 3 Click the **Break** button, and then click **Column**.
- 4 To delete a column break, click the column break dotted line in Draft view or select lines above and below the break, and then press the Delete key.



# Wrapping Text Around an Object

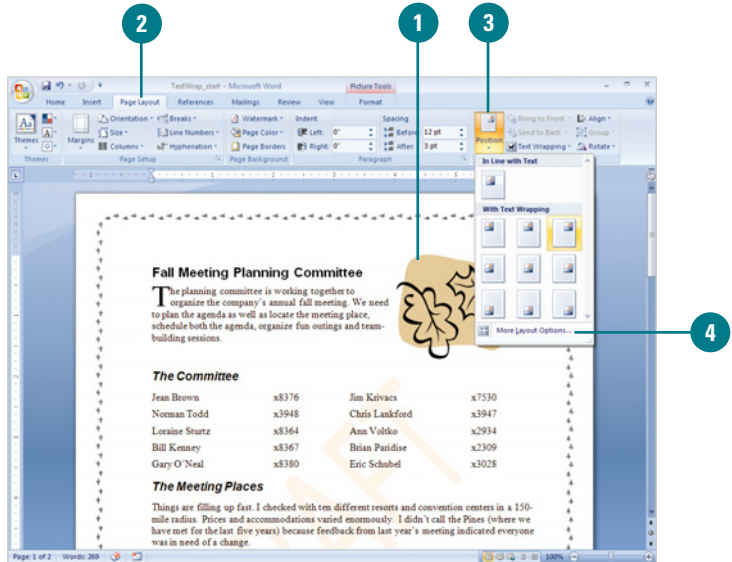
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## Change the Text Position Around an Object or Picture

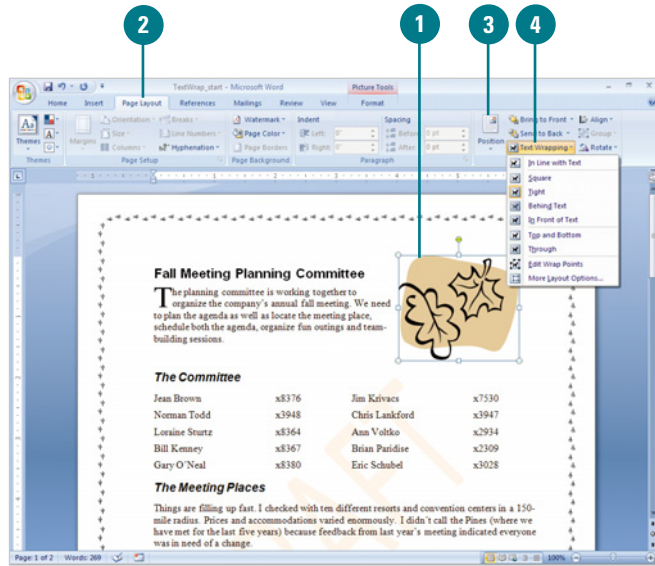
- 1 Select the picture or object.
- 2 Click the **Page Layout** tab.
- 3 Click the **Position** button, and then click the text wrapping option you want.
- 4 To customize text position, click the **Position** button, click **More Layout Options**, specify the options you want, and then click **OK**.

When integrating pictures, charts, tables, or other graphics with your text, you need to wrap the text around the object regardless of where it is placed on the page. Rather than having to constantly reset margins and make other tedious adjustments, Word simplifies this task with the text wrapping feature. Unless your object or table is large enough to span the entire page, your layout will look more professional if you wrap your text around it instead of leaving excessive white space.



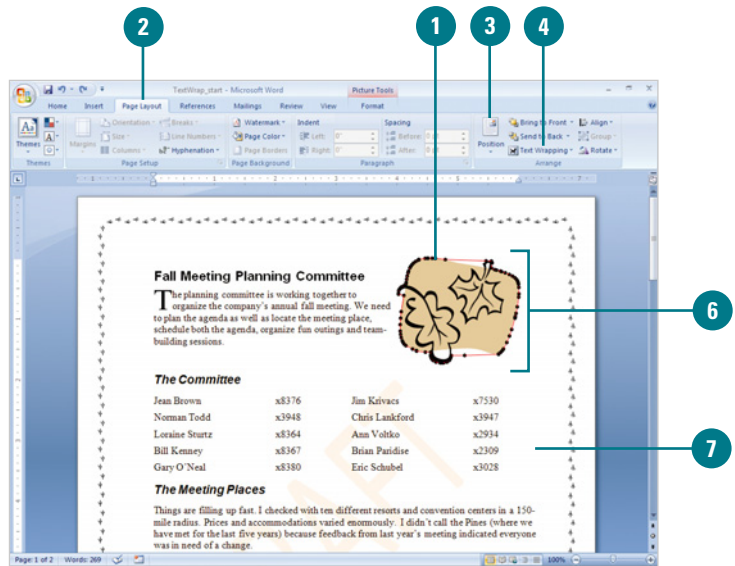
## Wrap Text Around an Object or Picture

- 1 Select the picture or object.
- 2 Click the **Page Layout** tab.
- 3 To change text position, click the **Position** button, select a position or click **More Layout Options**, specify the options you want, and then click **OK**.
- 4 Click the **Text Wrapping** button, and then click the text wrapping option you want.



## Wrap Text Tightly Around an Object or Picture

- 1 Select the picture or object.
- 2 Click the **Page Layout** tab.
- 3 To change text position, click the **Position** button, select a position or click **More Layout Options**, specify the options you want, and then click **OK**.
- 4 Click the **Text Wrapping** button, and then click **Tight**.
- 5 Click the **Text Wrapping** button, and then click **Edit Wrap Points**.
- 6 Drag edit points around the object or picture to tighten text around it.
- 7 Click a blank area of the document to deselect the object or picture.



# Working with Text Boxes

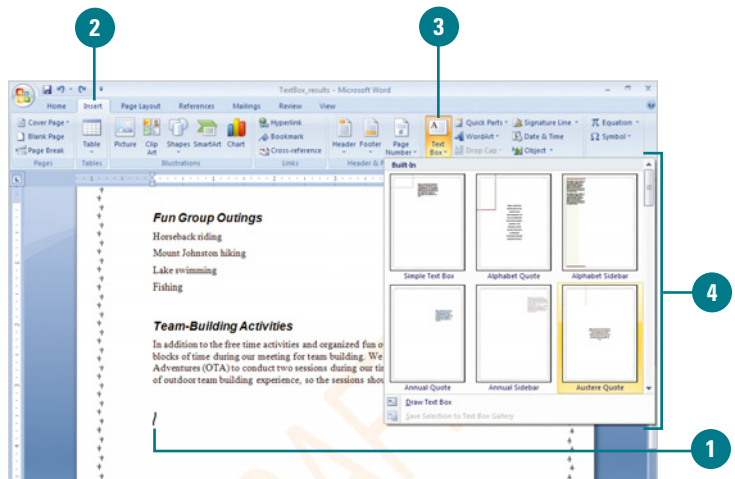
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WD07S-3.4.2, WD07S-3.4.3

## Insert a Text Box Pull Quote or Side Bar

- 1 Click where you want to insert a text box.
- 2 Click the **Insert** tab.
- 3 Click the **Text Box** button.
- 4 Click the predefined text box you want to insert.

In addition to normal text on a page, you can also create independent text boxes to hold other types of information—such as titles, heading, pull quotes (**New!**), side bars, and articles—similar to those found on a desktop publishing page. You can insert a text box with predefined information or you can create a blank text box. You can even link two or more text boxes together to have text flow to different parts of a document. If you no longer need the text boxes to link, you can quickly break the link.

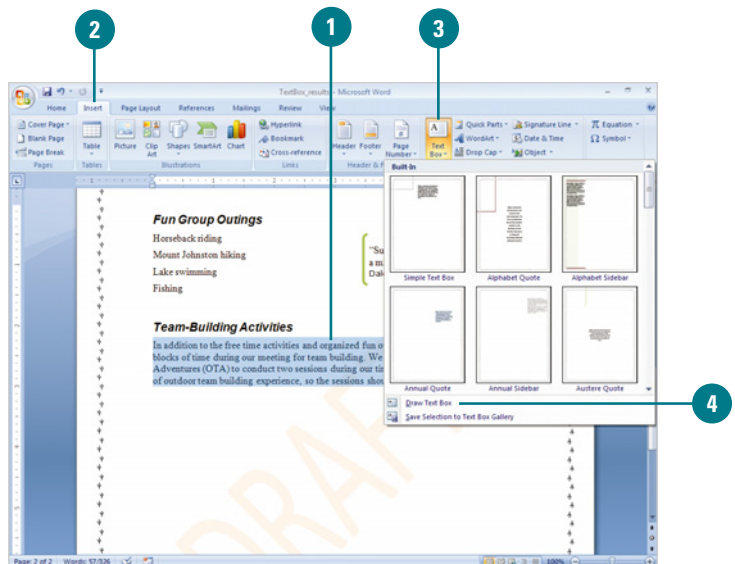


## Create a Text Box from Existing Text

- 1 Select the text you want to place in a text box.
- 2 Click the **Insert** tab.
- 3 Click the **Text Box** button.
- 4 Click **Draw Text Box**.

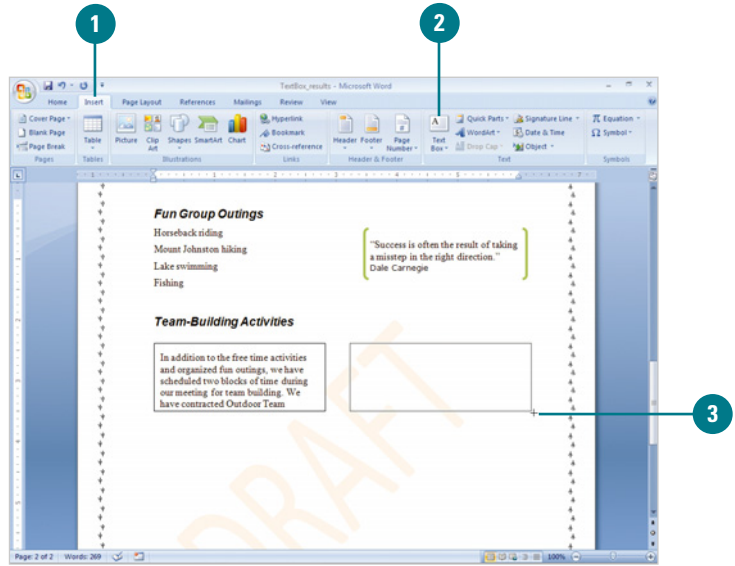
### Did You Know?

*You can change text direction in a text box.* Select the text box you want to modify, click the Text Direction button on the Format tab under Text Box Tools.



## Create a Text Box

- 1 Click the **Insert** tab.
- 2 Click the **Text Box** button.
- 3 Point to where you want to place the text box, and then drag to create a text box the size you want.
- 4 If necessary, click the text box to select it.
- 5 Type the text you want.
- 6 To resize the text box, drag a size handle.

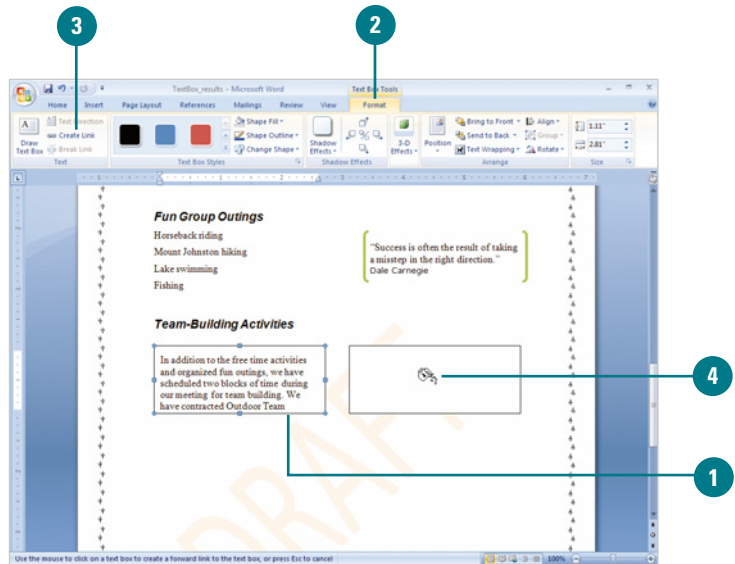


## Link Text Boxes

- 1 Select the source text box.
- 2 Click the **Format** tab under Text Box Tools.
- 3 Click the **Create Link** button.
- 4 Point to the destination text box (the pointer changes to a pitcher), and then click to link the text boxes.

### Did You Know?

**You can break a link.** Select the text box with the link you want to break, click the **Break Link** button on the **Format** tab under **Text Box Tools**, and then click the destination text box to break the link.



# Drawing and Resizing Shapes

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## Draw a Shape

- 1 Click the **Insert** tab.
- 2 Click the **Shapes** button.
- 3 Click the shape you want to draw.
- 4 Drag the pointer on the document where you want to place the shape until the drawing object is the shape and size that you want.

The shape you draw uses the line and fill color defined by the document's theme.

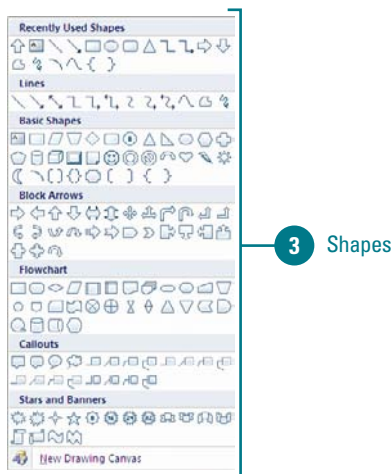
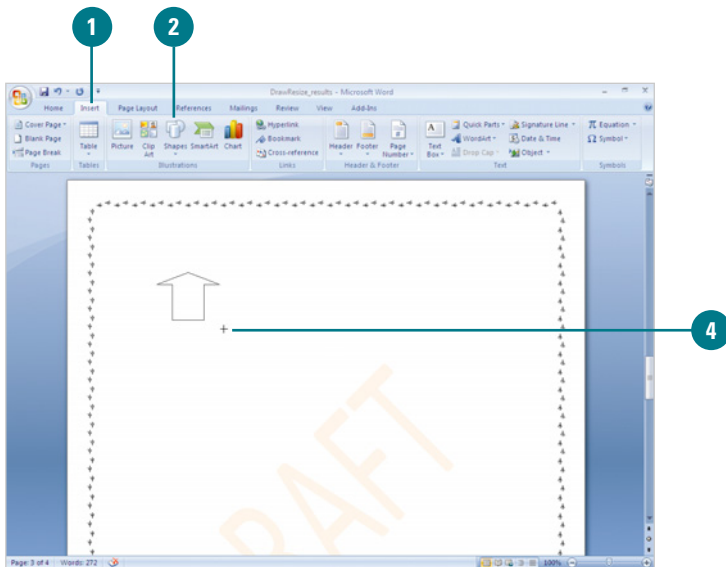
**TIMESAVER** To draw a proportional shape, hold down **Shift** as you drag the pointer.

### Did You Know?

**You can quickly delete a shape.** Click the shape to select it, and then press **Delete**.

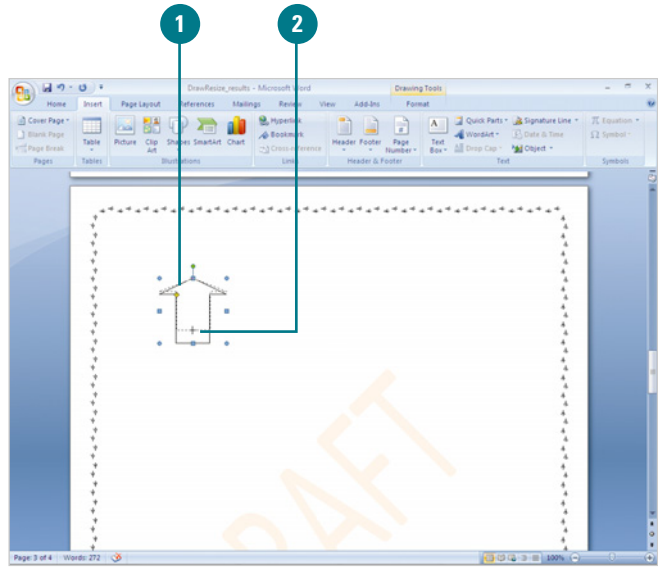
**You can draw a perfect circle or square.** To draw a perfect circle or square, click the **Oval** or **Rectangle** button on the **Shapes** gallery, and then press and hold **Shift** as you drag.

Word supplies ready-made shapes, ranging from hearts to lightning bolts to stars. The ready-made shapes are available directly on the **Shapes** gallery on the **Insert** and **Format** tabs. Once you have placed a shape on a document, you can resize it using the sizing handles. Many shapes have an **adjustment handle**, a small yellow or pink diamond located near a resize handle that you can drag to alter the shape. For precision when resizing, use the **Size Dialog Box Launcher** to specify the new size of the shape.



## Resize a Shape

- 1 Select the shape you want to resize.
- 2 Drag one of the sizing handles.
  - ◆ To resize the object in the vertical or horizontal direction, drag a sizing handle on the side of the selection box.
  - ◆ To resize the object in both the vertical and horizontal directions, drag a sizing handle on the corner of the selection box.
  - ◆ To resize the object with precise measurements, click the **Format** tab under Drawing Tools, and then specify exact height and width settings in the Size group.

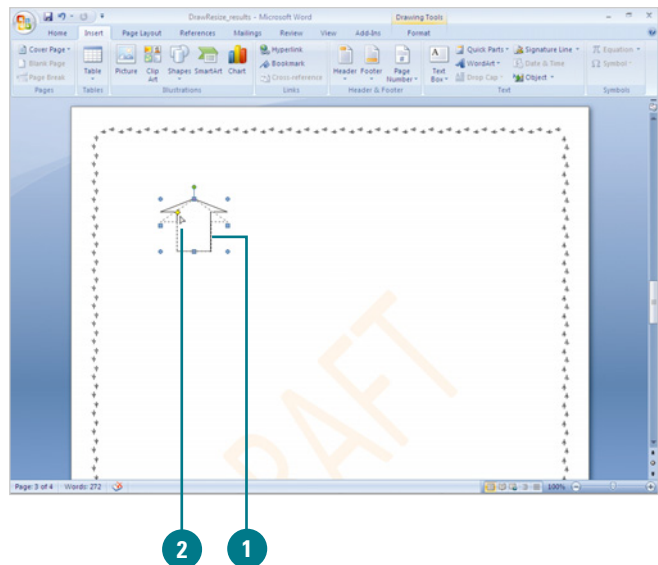


## Adjust a Shape

- 1 Select the shape you want to adjust.
- 2 Click one of the adjustment handles (small yellow diamonds), and then drag the handle to alter the form of the shape.

### Did You Know?

**You can replace a shape.** Replace one shape with another, while retaining the size, color, and orientation of the shape. Click the shape you want to replace, click the **Format** tab, click the **Edit Shape** button, point to **Change Shape**, and then click the new shape you want.



# Adding Text to a Shape

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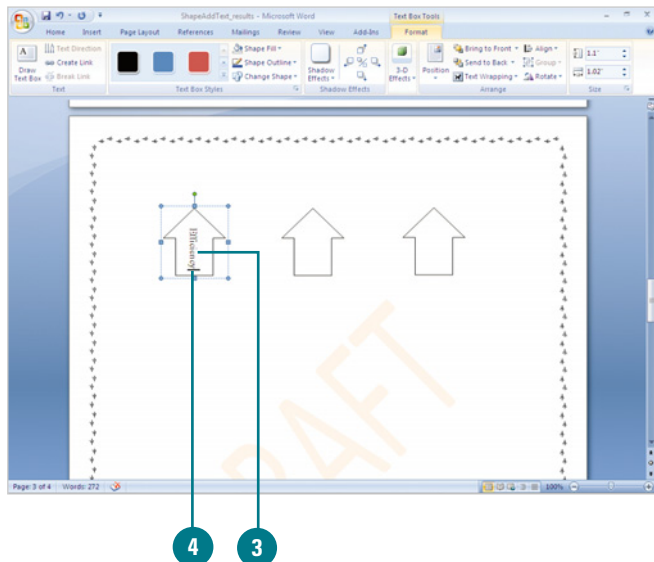
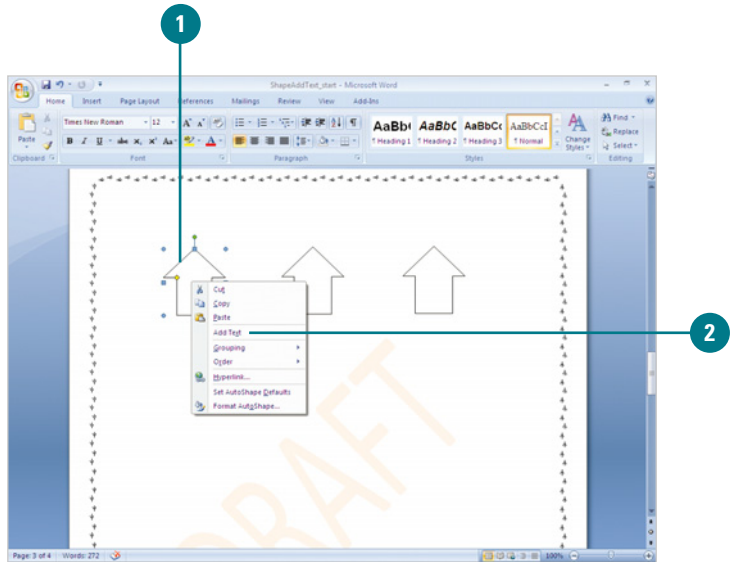
## Add Text to a Shape

- 1 Select the shape in which you want to add text.
- 2 Right-click the shape, and then click **Add Text**.
- 3 Type the text you want.
- 4 To edit the text in a shape, click the text to place the insertion point, and then edit the text.

### Did You Know?

*You can copy and move shapes.* To copy a shape, select the shape, click the Copy button on the Home tab, and then click the Paste button. To move a shape, position the cursor (which changes to a 4-headed arrow), and then drag it to a new location.

You can add text to a shape in the same way you add text to a text box. Simply, select the shape object, and then start typing. Shapes range from rectangles and circles to arrows and stars. When you place text in a shape, the text becomes part of the object. If you rotate or flip the shape, the text rotates or flips too. You can use tools, such as an alignment button or Font Style, on the Mini-toolbar and Home tab to format the text in a shape like the text in a text box.



# Creating and Editing Freeforms

## Draw a Freeform Polygon

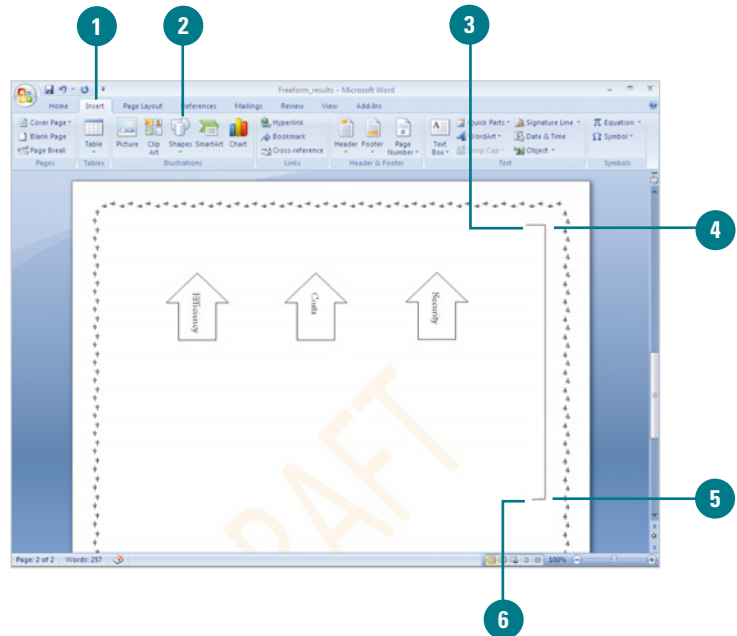
- 1 Click the **Insert** tab.
- 2 Click the **Shapes** button and then **Freeform** in the Shapes gallery under Lines.
- 3 Click the document where you want to place the first vertex of the polygon.
- 4 Move the pointer, and then click to place the second point of the polygon. A line joins the two points.
  - ◆ To draw a line with curves, drag a line instead of clicking in steps 3 and 4.
- 5 Continue moving the mouse pointer and clicking to create additional sides of your polygon.
- 6 Finish the polygon. For a closed polygon, click near the starting point. For an open polygon, double-click the last point in the polygon.

### Did You Know?

**You can convert a shape to a freeform.** Select the shape, click the Edit Shape button, and then click Convert to Freeform.

**You can switch between a closed curve and an open curve.** Right-click the freeform drawing, and then click Close Path or Open Path.

When you need to create a customized shape, use the freeform tools. Choose a freeform tool from the Lines category in the list of shapes. Freeforms are like the drawings you make with a pen and paper, except that you use a mouse for your pen and a document for your paper. A freeform shape can either be an open curve or a closed curve. You can edit a freeform by using the Edit Points command to alter the vertices that create the shape.



## For Your Information

### Modifying a Freeform

Each vertex indicated by a black dot (a corner in an irregular polygon and a bend in a curve) has two attributes: its position, and the angle at which the curve enters and leaves it. You can move the position of each vertex and control the corner or bend angles. You can also add or delete vertices as you like. When you delete a vertex, Word recalculates the freeform and smooths it among the remaining points. Similarly, if you add a new vertex, Word adds a corner or bend in your freeform. To edit a freeform, click the freeform object, click the Format tab under Drawing Tools, click the Edit Shape button, click Edit Points, modify any of the points (move or delete), and then click outside to set the new shape.

# Adding a Quick Style to a Shape

Microsoft  
Certified  
Application  
Specialist

WD07S-3.4.2

## Add a Quick Style to a Shape

- 1 Select the shapes you want to modify.
- 2 Click the **Format** tab under Drawing Tools.
- 3 Click the scroll up or down arrow, or click the **More** list arrow in the Shapes Styles group to see additional styles.

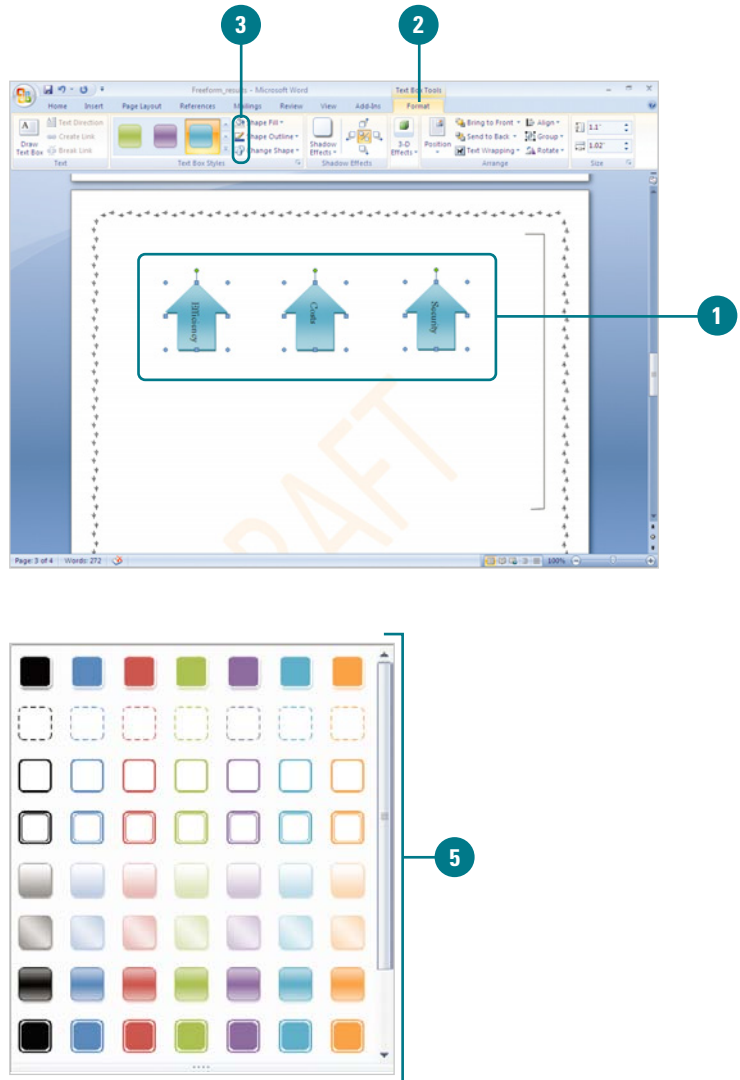
The current style appears highlighted in the gallery.

- 4 Point to a style.
- 5 Click the style you want from the gallery to apply it to the selected shape.

### Did You Know?

**You can add a Quick Style to a text box.** A shape is a text box without a fill and outline (border), so you can apply a Quick Style to a text box using the same steps.

Instead of changing individual attributes of a shape—such as shape fill, shape outline, and shape effects—you can quickly add them all at once with the Shape Quick Style gallery. The Shape Quick Style gallery (**New!**) provides a variety of different formatting combinations. To quickly see if you like a Shape Quick Style, point to a thumbnail in the gallery to display a live preview (**New!**) of it in the selected shape. If you like it, you can apply it.



# Adding Formatting to Shape Text

Microsoft Certified Application Specialist

WD07S-3.4.2

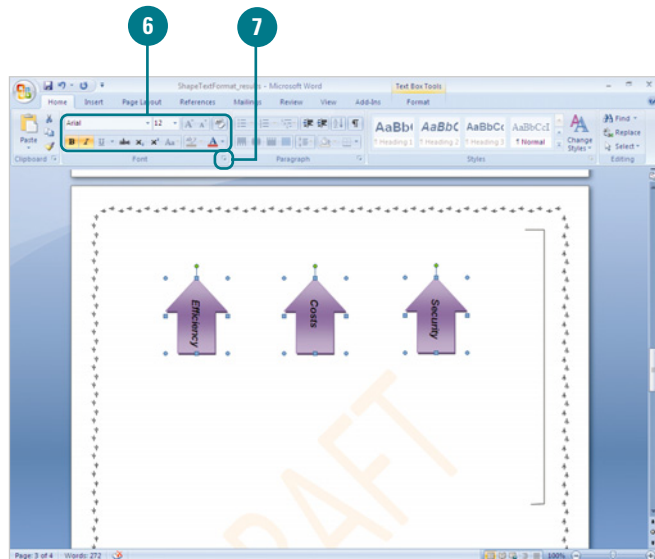
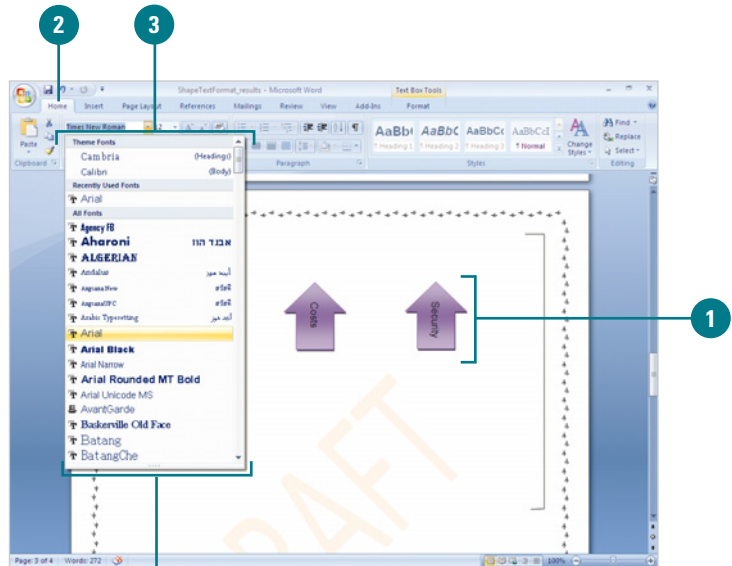
## Add a Style to Shape Text

- 1 Select the shapes with the text you want to modify.
- 2 Click the **Home** tab.
- 3 To change fonts, click the **Font** list arrow or click the **Font Size** list arrow.
- 4 Point to a font style or size.

A live preview (**New!**) of the style or size appears in the current shape.

- 5 Click the style or size you want to apply to the selected shape.
- 6 To apply other formatting, click one or more of the formatting buttons on the Ribbon: **Bold**, **Italic**, **Underline (New!)**, **Shadow**, **Strikethrough (New!)**, or **Font Color**.
- 7 To use the Font dialog box to change font attributes, click the **Font** Dialog Box Launcher, specify the changes you want, and then click **OK**.

You can format text in a shape the same way you format text on a document page. You can change several font attributes—such as bolding, italics, or underlining—to enhance data to catch the reader's attention. The main formats you apply to text are available on the Home tab in the Font group or in the Font dialog box. Some of the additional formats available include strikethrough, subscript, and superscript, and underline style and color (**New!**).



# Applying Color Fills

## Apply a Color Fill to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Shape Fill** button.
- 4 Select the fill color option you want.
- 5 To remove a color fill, click the **Shape Fill** button, and then click **No Fill**.

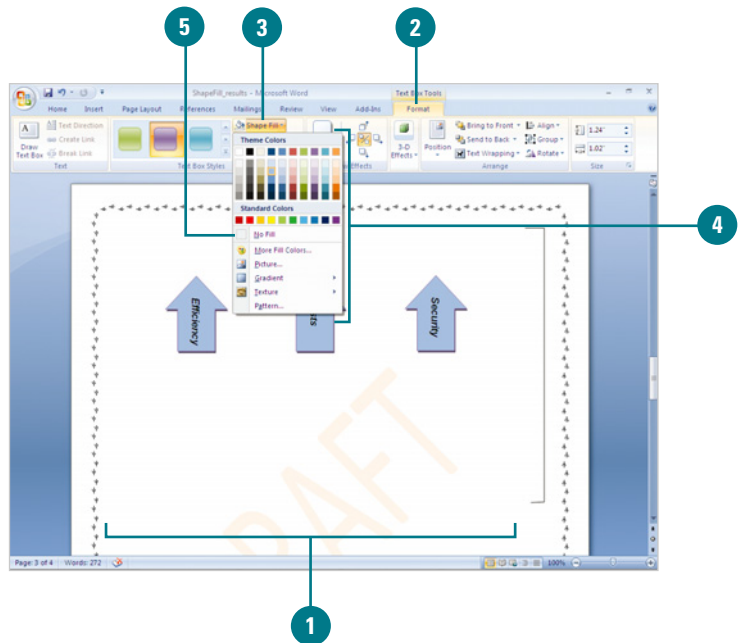
### Did You Know?

**You can set the color and line style for an object as the default.** Right-click the object, and then click Set as Default Shape. Any new objects you create will use the same styles.

**You can use the document background as the fill for a shape.** Right-click the object, click Format Shape, click Fill in the left pane, click the Background option, and then click Close.

**You can undo changes made in the Format Shape dialog box.** Since changes made in the Shape Format dialog box are instantly applied, it's not possible to Cancel the dialog box. To remove changes, click the Undo button on the Quick Access Toolbar.

When you create a closed drawing object such as a square, it applies the Shape Fill color to the inside of the shape, and the Shape Outline color to the edge of the shape. A line drawing object uses the Shape Outline color. You can set the Shape Fill to be a solid, gradient, texture or picture, and the Shape Outline can be a solid or gradient (**New!**). If you want to make multiple changes to a shape at the same time, the Format Shape dialog box allows you to do everything in one place. If the solid color appears too dark, you can make the color fill more transparent. If you no longer want to apply a shape fill to an object, you can remove it.



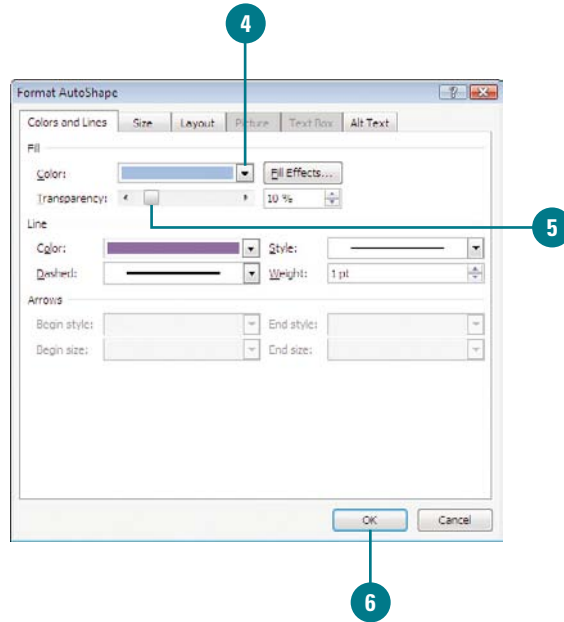
## For Your Information

### Formatting a SmartArt Shape

In the same way you can apply shape fills, outlines, and effects to a shape, you can also apply them to shapes in a SmartArt graphic. You can modify all or part of the SmartArt graphic by using the Shape Fill, Shape Outline, and Shape Effects buttons (**New!**). Shape Fill can be set to be a solid, gradient, texture or picture, or set the Shape Outline to be a solid or gradient (**New!**). In addition, you can change the look of a SmartArt graphic by applying effects (**New!**), such as glow and soft edges. If a shape in a SmartArt graphic contains text, you can use WordArt style galleries to modify shape text.

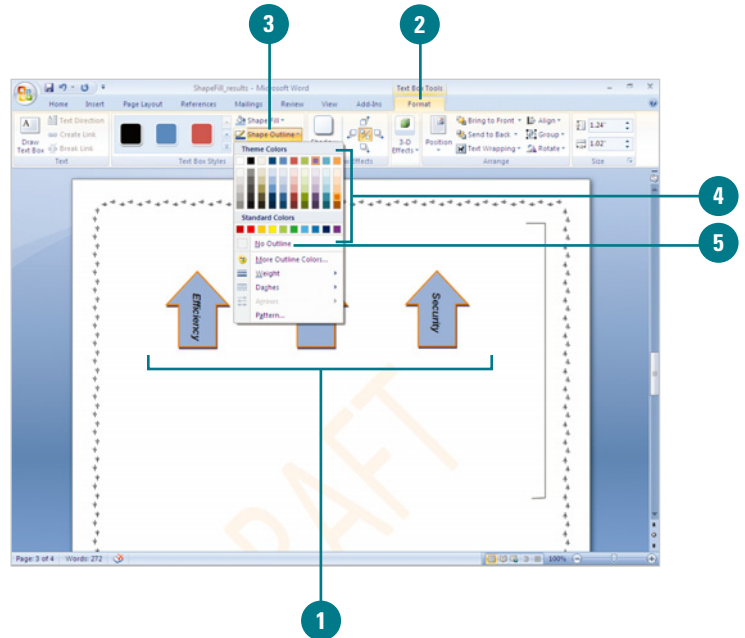
## Apply a Shape Color Fill with a Transparency

- 1 Select the shape you want to modify.
  - 2 Click the **Format** tab under Drawing or Text Box Tools.
  - 3 Click the **Text Box Styles** or **Shape Styles Dialog Box Launcher**.
  - 4 Click the **Color** list arrow, and then select the fill color you want.
  - 5 Drag the **Transparency** slider or enter a number from 0 (fully opaque) to 100 (fully transparent).
- All your changes are instantly applied to the shape.
- 6 Click **OK**.



## Apply a Color Outline to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Shape Outline** button.
- 4 Select the outline color you want.
- 5 To remove an outline color, click the **Shape Outline** button, and then click **No Outline**.



# Applying Picture or Texture Fills

## Apply a Picture or Texture Fill to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Shape Fill** button.
  - ◆ Click **Picture**, locate and select a picture file you want, and then click **Insert**.
  - ◆ Point to **Texture**, and then select a texture.

### Did You Know?

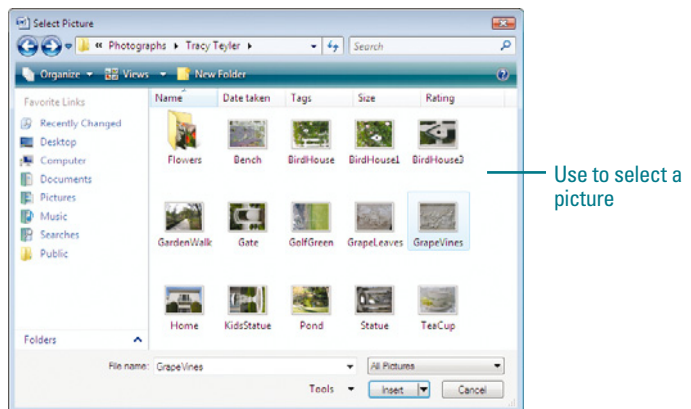
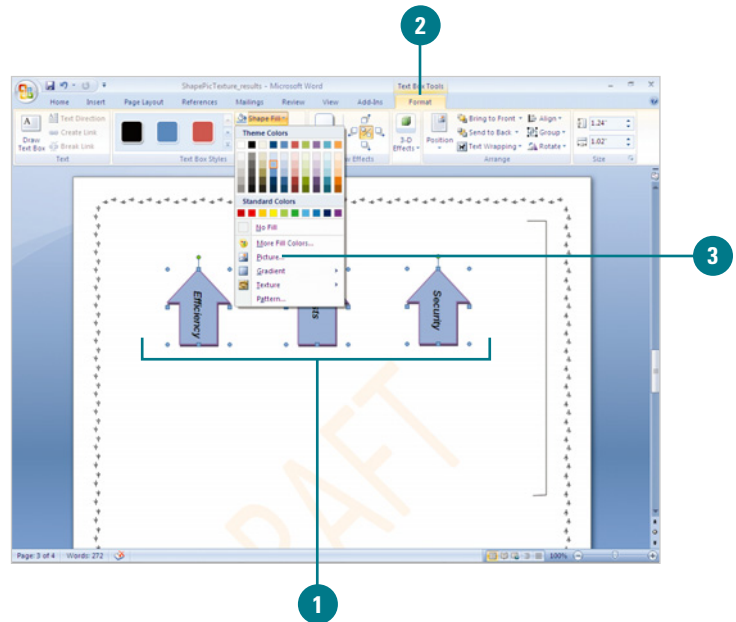
#### **You can apply a custom picture fill.**

Right-click the object you want to modify, click Format Shape, click Fill, click the Picture or texture fill option, click File, Clipboard, or Clip Art to select a picture, select the tile, stretch, and transparency options you want, and then click Close.

#### **You can apply a custom texture fill.**

Right-click the object you want to modify, click Format Shape, click Fill, click the Picture or texture fill option, click the Texture button, select a texture, select the offset, scale, alignment, mirror and transparency options you want, and then click Close.

Applying a shape fill to a drawing object can add emphasis or create a point of interest in your document. You can insert a picture or clip art or texture into a shape. You can insert a picture from a file or clip art from the Clip Art task pane, or paste one in from the Clipboard. Stretch a picture or texture to fit across the selected shape or repeatedly tile it horizontally and vertically to fill the shape. When you stretch an image, you can also set offsets, which determine how much to scale an image to fit a shape relative to the edges. A positive offset number moves the image edge toward the center of the shape, while a negative offset number moves the image edge away from the shape. If the image appears too dark, you can make the picture more transparent.



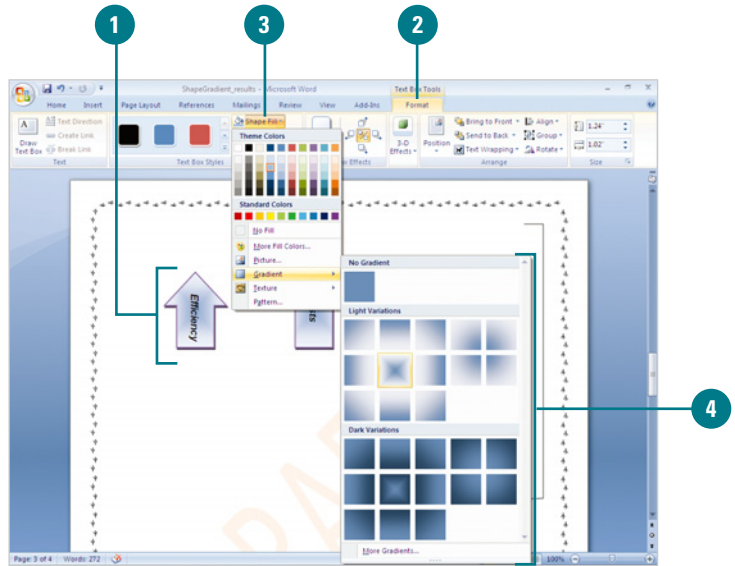
# Applying Gradient Fills

## Apply a Gradient Fill to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Shape Fill** button.
- 4 Point to **Gradient**, and then select a gradient from the gallery.

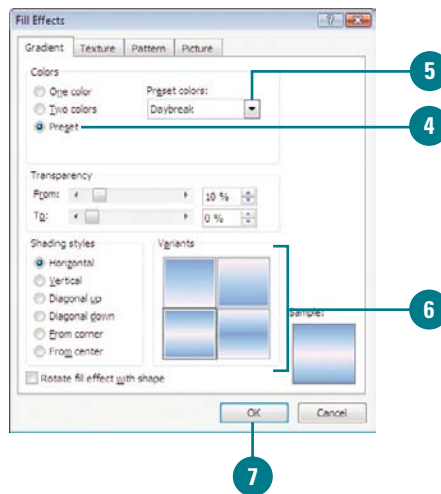
Four gradient modes are available: linear (parallel bands), radial (radiate from center), rectangle (radiate from corners), and path (radiate along path).

Gradients are made up of two or more colors that gradually fade into each other. They can be used to give depth to a shape or create realistic shadows. Apply a gradient fill to a shape by using a gallery or presets for quick results, or by using the Fill Effects dialog box for custom results. A gradient is made up of several gradient stops, which are used to create non-linear gradients. Gradient stops consist of a position, a color, and a transparency percentage.



## Apply a Gradient Fill with Presets

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Shape Fill** button, point to **Gradient**, and then click **More Gradients**.
- 4 Click the **Preset** option.
- 5 Click the **Preset colors** list arrow, and then select a gradient preset.
- 6 Click the gradient fill you want.
- 7 Click **OK**.



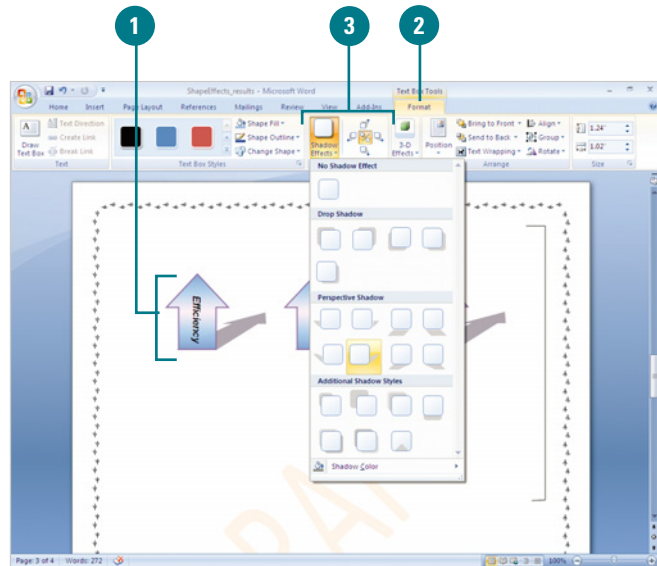
# Applying Shape Effects



You can change the look of a shape by applying effects, like shadows and 3-D rotations. You can apply effects to a shape by using the Shadow or 3-D Effects gallery for quick results. From the 3-D Effects gallery you can apply a built-in combination of 3-D effects or individual 3-D effects to a shape. To quickly see if you like the effect, point to a thumbnail in the Shadow or 3-D Effects gallery to display a live preview (New!) of it. If you like it, you can apply it. If you no longer want to apply the effect, you can remove it. Simply, select the shape, and then select the No effect type option on the Shadow Effects or 3-D Effects gallery.

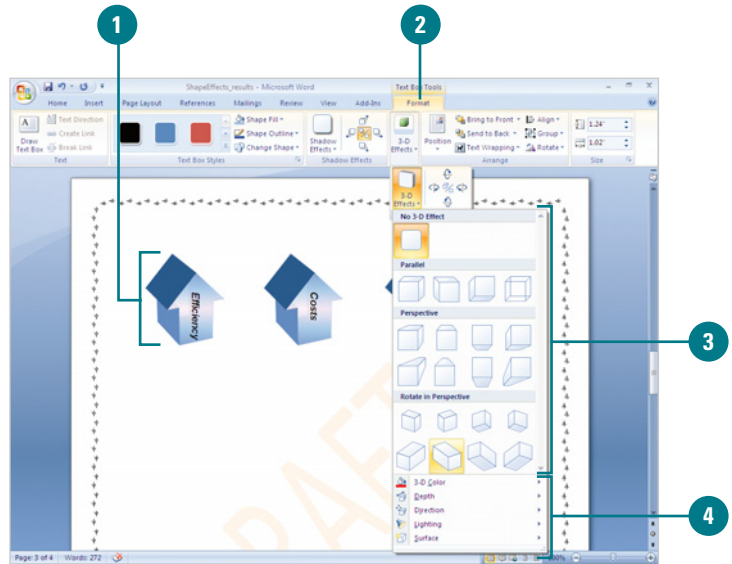
## Add a Preset Shadow Effect to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 To add a shadow, click the **Shadow Effects**, and then select a shadow effect.
  - ◆ To change the location and length of a shadow, click any of the Nudge Shadow buttons.
  - ◆ To remove a shadow, click the **Shadow On/Off** button in the middle of the Nudge Shadow buttons.



## Add a Preset 3-D Effect to a Shape

- 1 Select the shape you want to modify.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 To add a 3-D effect, click the **3-D Effects**, click the **3-D Effects** button, and then select a 3-D effect.
  - ◆ To change the location and length of a 3-D effect, click any of the Tilt buttons.
  - ◆ To remove a shadow, click the **3-D On/Off** button in the middle of the Tilt buttons.
- 4 To add individual 3-D effects, click the **3-D Effects**, click the **3-D Effects** button, and then select a 3-D effect.
  - ◆ **3-D Color.** Change the color for the 3-D effect.
  - ◆ **Depth.** Change the depth perspective for the shape in points.
  - ◆ **Direction.** Change the direction of the 3-D effect. You can also change the direction to perspective or parallel.
  - ◆ **Lighting.** Change the angle of the lighting source.
  - ◆ **Surface.** Change the surface of the shape: Matte, Plastic, Metal, or Wire Frame.

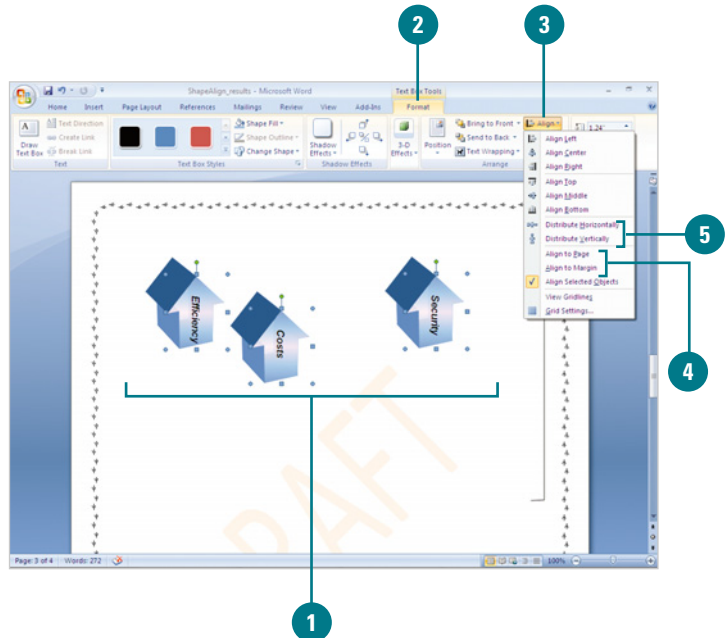


# Aligning and Distributing Objects

## Distribute Objects

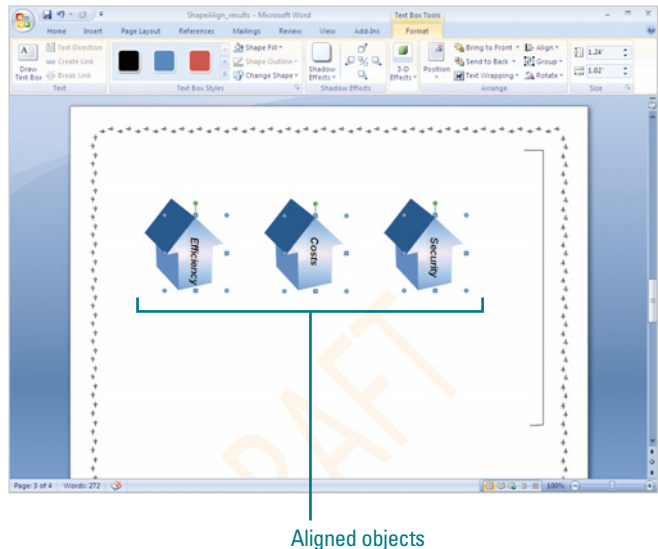
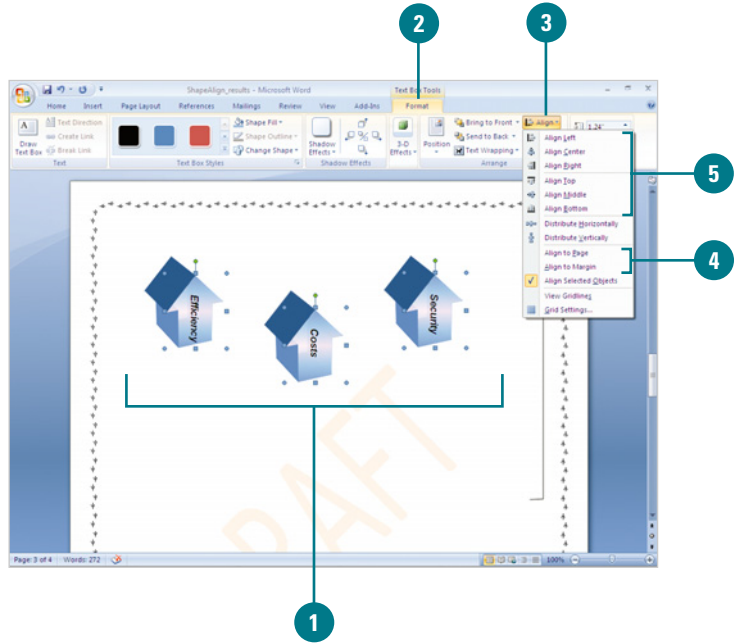
- 1 Select the objects you want to distribute.
- 2 Click the **Format** tab under Drawing Tools.
- 3 Click the **Align** button.
- 4 On the Align menu, click the alignment method you want:
  - ◆ Click **Align to Page** if you want the objects to align relative to the document page.
  - ◆ Click **Align to Margin** if you want the objects to align relative to the document margin.
- 5 On the Align submenu, click the distribution command you want:
  - ◆ Click **Distribute Horizontally** to evenly distribute the objects horizontally.
  - ◆ Click **Distribute Vertically** to evenly distribute the objects vertically.

In addition to using grids and guides to align objects to a specific point, you can align a group of objects to each other. The Align commands make it easy to align two or more objects relative to each other vertically to the left, center, or right, or horizontally from the top, middle, or bottom. To evenly align several objects to each other across the document, either horizontally or vertically, select them and then choose a distribution option. Before you select an align command, specify how you want Word to align the objects. You can align the objects in relation to the document or to the selected objects.



## Align Objects with Other Objects

- 1 Select the objects you want to align.
- 2 Click the **Format** tab under Drawing Tools.
- 3 Click the **Align** button.
- 4 On the Align menu, click the alignment method you want:
  - ◆ Click **Align to Page** if you want the objects to align relative to the document page.
  - ◆ Click **Align to Margin** if you want the objects to align relative to the document margin.
- 5 On the Align menu, click the alignment command you want:
  - ◆ Click **Align Left** to line up the objects with the left edge of the selection or document.
  - ◆ Click **Align Center** to line up the objects with the center of the selection or document.
  - ◆ Click **Align Right** to line up the objects with the right edge of the selection or document.
  - ◆ Click **Align Top** to line up the objects with the top edge of the selection or document.
  - ◆ Click **Align Middle** to line up the objects vertically with the middle of the selection or document.
  - ◆ Click **Align Bottom** to line up the objects with the bottom of the selection or document.

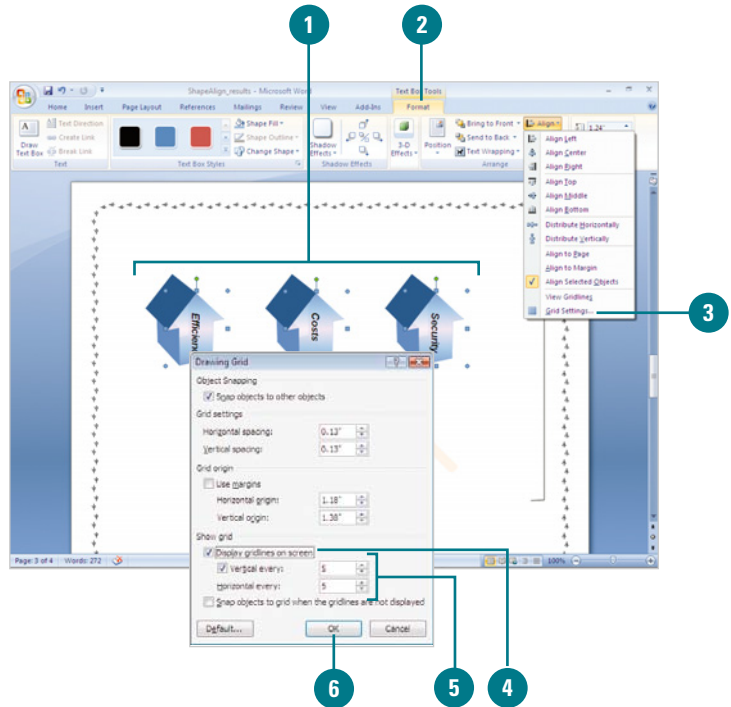


# Aligning Objects to Grids

## Turn On or Turn Off the Visible Grid

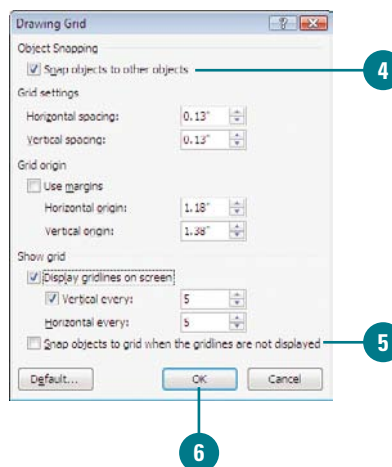
- 1 Select the objects you want to arrange.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Align** button, and then click **Grid Settings**.
- 4 Select or clear the **Display grid on screen** check box.
- 5 Select or clear the **Vertical every** check box, and then enter a value for the vertical and horizontal gridlines, if you turn it on.
- 6 Click **OK**.

Word uses a grid to align an individual object or a group of objects to a vertical or horizontal line. Turning on the visible grid option makes it easier to create, modify, and align a shape. Within the Drawing Grid dialog box, you can select from a variety of options, such as snapping objects to the grid or to other objects and displaying drawing guides on-screen.



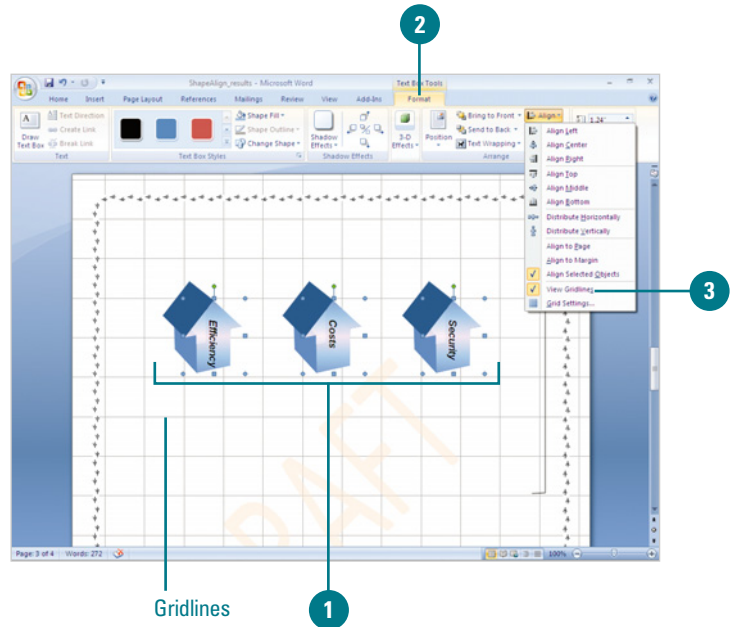
## Set Objects to Snap into Place

- 1 Select the objects you want to arrange.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Align** button, and then click **Grid Settings**.
- 4 Select the **Snap objects to other objects** check box.
- 5 Select the **Snap objects to grid when the gridlines are not displayed** check box.
- 6 Click **OK**.



## Show or Hide the Gridlines

- 1 Select the objects you want to arrange.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Align** button, and then click **View Gridlines**.

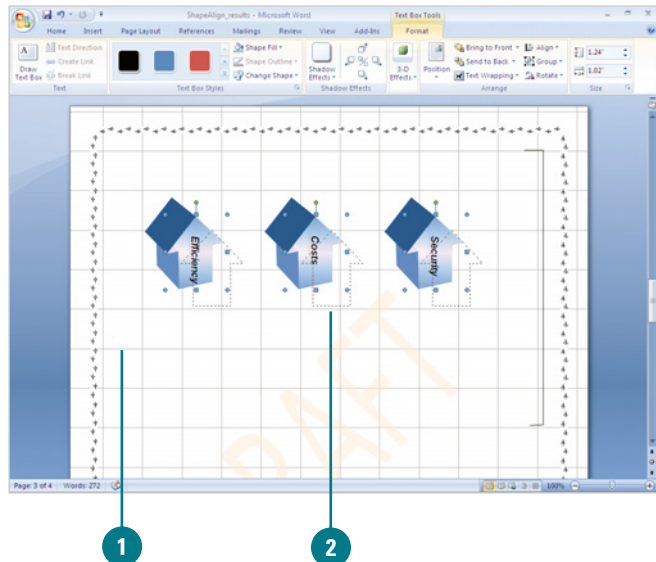


## Align an Object to a Grid

- 1 If you want, display gridlines on the screen (horizontal and vertical).
- 2 Drag the object's center or edge near the guide. Word aligns the center or edge to the guide.

### Did You Know?

**You can use the keyboard to override grid settings.** To temporarily override settings for the grids and guides, press and hold the Alt key as you drag an object.



# Changing Stacking Order

## Arrange a Stack of Objects

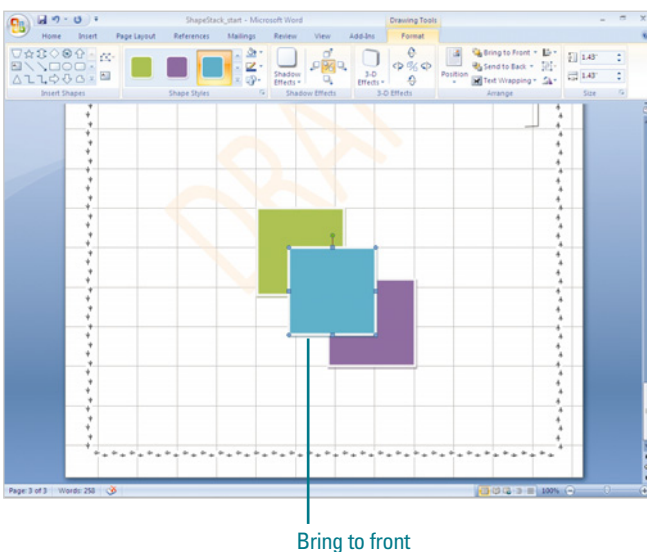
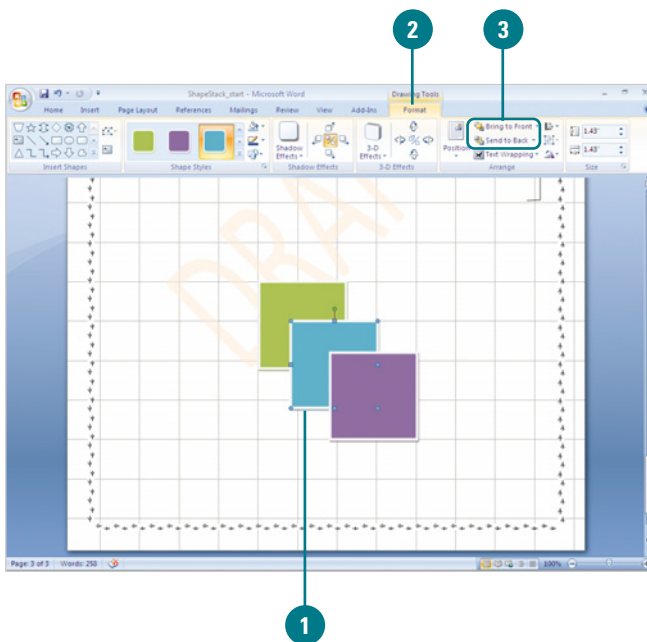
- 1 Select the objects you want to arrange.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the stacking option you want.
  - ◆ Click the **Bring to Front** button arrow, and then click **Bring to Front**, **Bring Forward**, or **Bring in Front of Text** to move a drawing to the top of the stack or up one location in the stack.
  - ◆ Click the **Send to Back** button arrow, and then click **Send to Back**, **Send Backward**, or **Send Behind Text** to move a drawing to the bottom of the stack or back one location in the stack.

### Did You Know?

**You can view a hidden object in a stack.** Press the Tab key or Shift+Tab to cycle forward or backward through the objects until you select the object you want.

**You can connect two shapes.** Click the Insert tab, click the Shapes button or list arrow, click a connector (located in the Lines category), position the pointer over an object handle (turns red), drag the connector to the object handle (turns red) on another object. An attached connector point appears as red circles, while an unattached connector point appears as light blue.

Multiple objects on a document appear in a stacking order, like layers of transparencies. Stacking is the placement of objects one on top of another. In other words, the first object that you draw is on the bottom and the last object that you draw is on top. You can change the order of this stack of objects by using Bring to Front, Send to Back, Bring Forward, and Send Backward commands on the Format tab under Drawing or Text Box Tools.

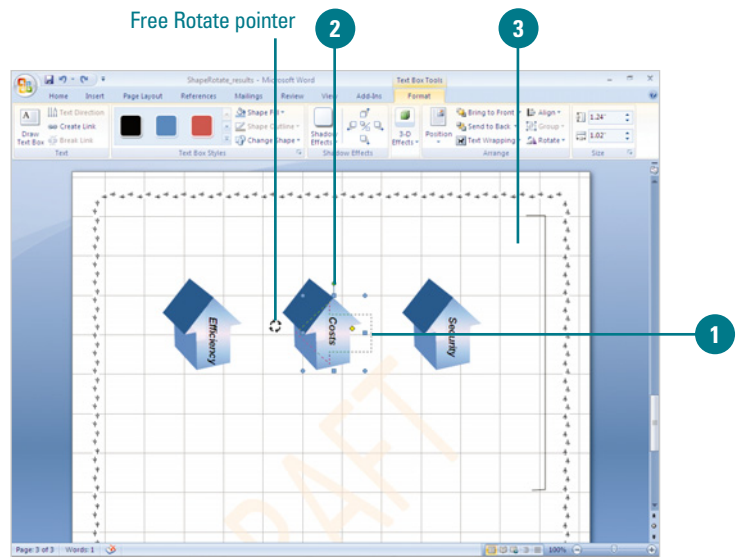


# Rotating and Flipping Objects

## Rotate an Object to any Angle

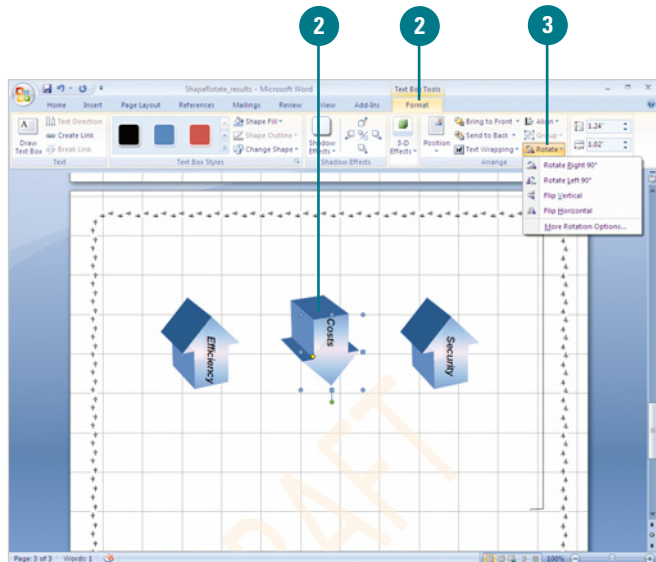
- 1 Select the object you want to rotate.
- 2 Position the pointer (which changes to the Free Rotate pointer) over the green rotate lever at the top of the object, and then drag to rotate the object.
- 3 Click outside the object to set the rotation.

After you create an object, you can change its orientation on the document by rotating or flipping it. Rotating turns an object 90 degrees to the right or left; flipping turns an object 180 degrees horizontally or vertically. For a more freeform rotation, which you cannot achieve in 90 or 180 degree increments, drag the green rotate lever at the top of an object. You can also rotate and flip any type of picture—including bitmaps—in a document. This is useful when you want to change the orientation of an image, such as changing the direction of an arrow.



## Rotate or Flip an Object Using Preset Increments

- 1 Select the object you want to rotate or flip.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Rotate** button, and then click the option you want.
  - ◆ **Rotate**. Click Rotate Right 90° or Rotate Left 90°.
  - ◆ **Flip**. Click Flip Vertical or Flip Horizontal.



# Grouping and Ungrouping Objects



Objects can be grouped, ungrouped, and regrouped to make editing and moving them easier. Rather than moving several objects one at a time, you can group the objects and move them all together. Grouped objects appear as one object, but each object in the group maintains its individual attributes. You can change an individual object within a group without ungrouping. This is useful when you need to make only a small change to a group, such as changing the color of a single shape in the group. You can also format specific shapes, drawings, or pictures within a group without ungrouping. Simply select the object within the group, change the object or edit text within the object, and then deselect the object. However, if you need to move an object in a group, you need to first ungroup the objects, move it, and then group the objects together again. After you ungroup a set of objects, Word remembers each object in the group and regroups those objects in one step when you use the Regroup command. Before you regroup a set of objects, make sure that at least one of the grouped objects is selected.

## Group Objects Together

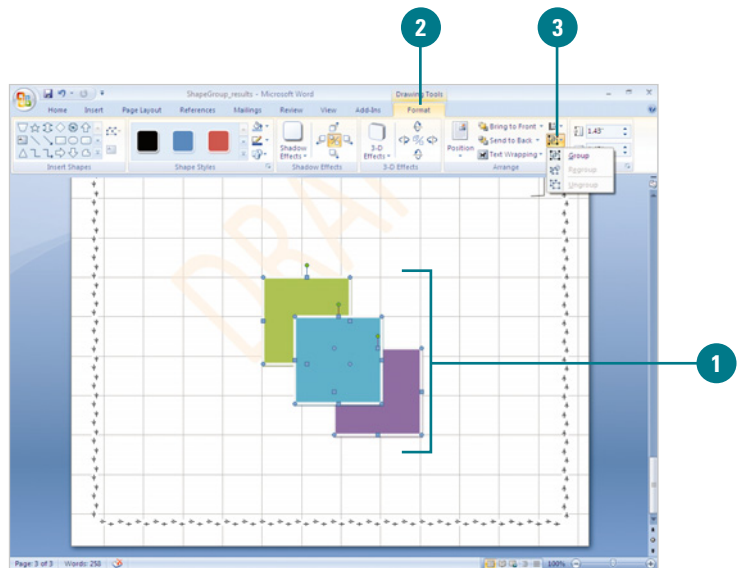
- 1 Select the shapes you want to group together.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Group** button, and then click **Group**.

### Did You Know?

**You can use the Tab key to select objects in order.** Move between the drawing objects on your document (even those hidden behind other objects) by pressing the Tab key.

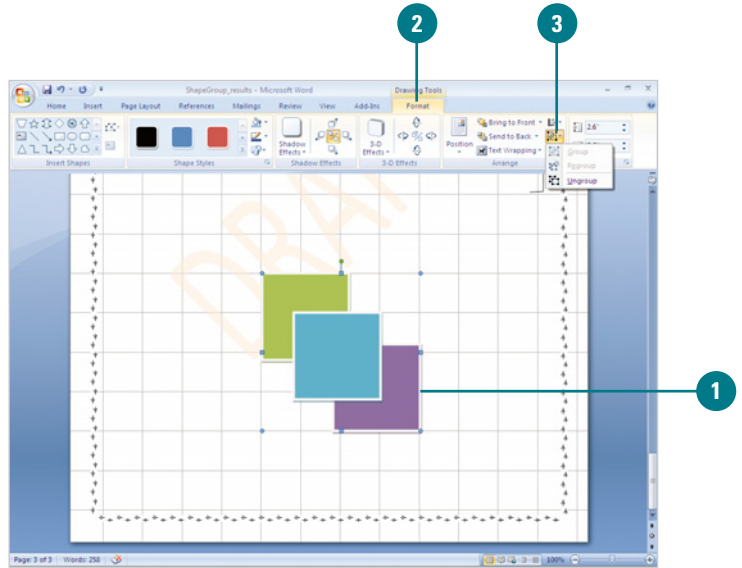
**You can use the shortcut menu to select Group related commands.** Right-click the objects you want to group, point to Group, and then make your selections.

**You can no longer ungroup tables.** Due to the increased table size and theme functionality, tables can no longer be ungrouped.



## Ungroup Objects

- 1 Select the grouped object you want to ungroup.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Group** button, and then click **Ungroup**.

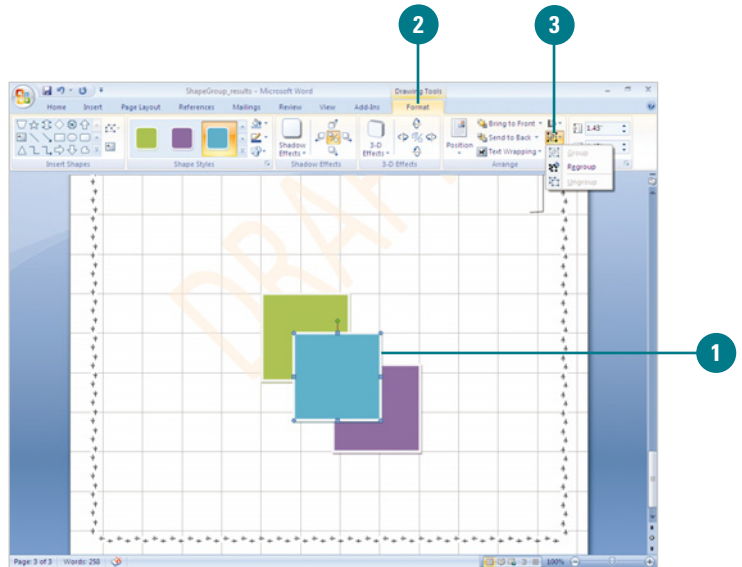


## Regroup Objects

- 1 Select one of the objects in the group of objects you want to regroup.
- 2 Click the **Format** tab under Drawing or Text Box Tools.
- 3 Click the **Group** button, and then click **Regroup**.

### Did You Know?

**You can troubleshoot the arrangement of objects.** If you have trouble selecting an object because another object is in the way, you can use the Selection pane to help you select it.



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# Working with Long Documents

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# 8

## Introduction

When working with long documents, the ability to split up the tasks can be crucial to meeting a deadline. Microsoft Office Word 2007 can do just that. By creating a master document in an Outline format, you can simply select the sections of the master that will be sectioned off as a subdocument. Word creates a number of subdocuments off the master, based on how you decide to group them. Once the subdocuments are created, they become separate files that others can open, develop, save and re-insert into the master.

Using master documents and subdocuments by many individuals could be a formatting nightmare. Word has an automatic formatting tool to help you create an overall format for your long document. In order to help your readers process your document, headers and footers, along with a cross reference, are a great way to keep them focused on the material at hand.

Once your long document is created and will be bound in some fashion, it's important to make sure that you have enough white space around the margins so that text won't get cut off during the binding process. And, as you navigate through the document, be sure to check for any special items that might require your attention. You can use the Go To function to quickly move from object to object, section to section, or page to page, to name a few. The Select Browse Object button is also a way to navigate through your long document. Browse by comments, graphics, tables or footnotes. The availability for Word to seek out these objects and for you to review them is crucial to your long document being a success.

Other documents items, such as a Table of Contents and an Index can all be done very easily in Word. When you need to know that final word count, you can find it quickly through the References tab.

## What You'll Do

**Create an Outline**

**Create a Multiple-Author Document**

**Create Documents Using Automatic Formatting**

**Create Headers and Footers**

**Insert Page Numbers and the Date and Time**

**Insert Cross References**

**Prepare for a Bound Document**

**Find Topics in a Long Document**

**Navigate a Long Document**

**Insert a Table of Contents**

**Create an Index**

**Create a Summary**

**Determine Word Count Statistics**

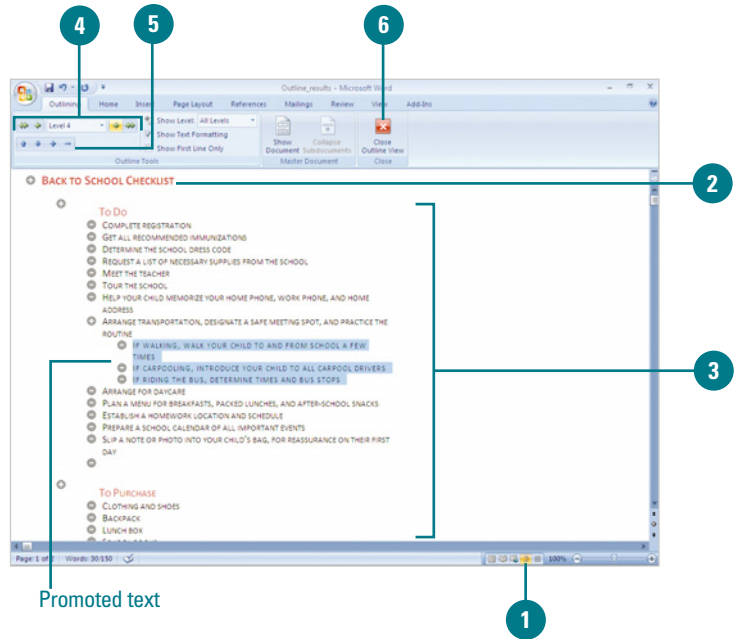
**Add Cover Page**

# Creating an Outline

## Create an Outline in Outline View

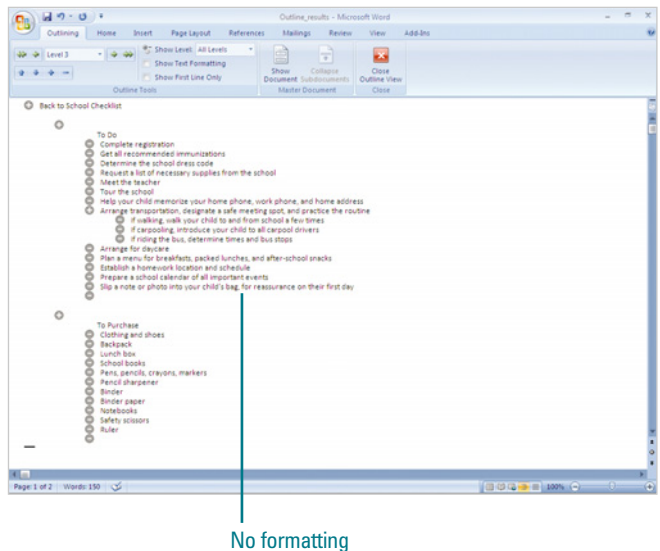
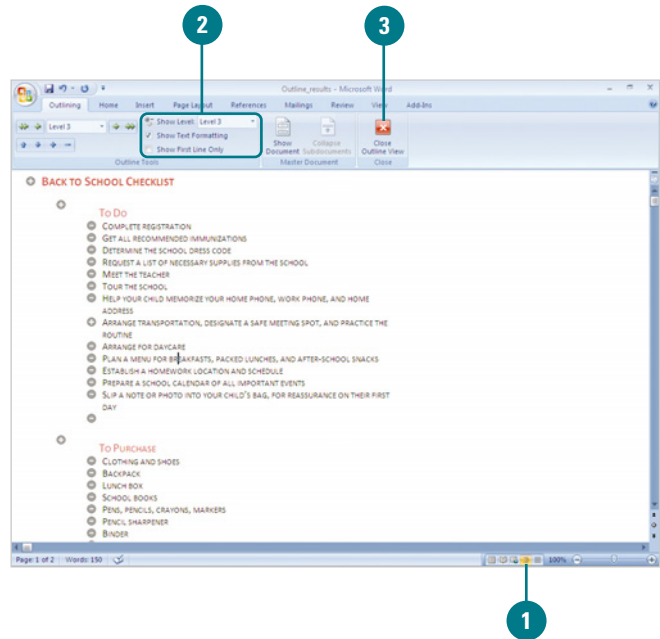
- 1 In a new document, click the **Outline View** button.
- 2 Type a heading, and then press Enter.
- 3 Type another heading or press Tab to add a subheading under the heading.
- 4 To change a heading or subheading to a different level and apply the corresponding heading style, place the insertion point in the heading, and then click the **Promote** or **Demote** button until the heading is at the level you want, or click **Promote to Heading** or **Promote to Body** button.
- 5 To move a heading or subheading to a different location, place the insertion point in the heading, and then click the **Move Up** or **Move Down** button until the heading is moved where you want it to go.
- 6 When you're done, click the **Close Outline View** button.

Outlines are useful for organizing information, such as topics in an essay. An outline typically consists of main headings and subheadings. You can create an outline from scratch in Outline view or change a bulleted or numbered list into an outline using the bullets and numbering commands on the Home tab. In Outline view, you can use buttons in the Outlining Tools group or drag the mouse pointer to move headings and subheadings to different locations or levels.



## Change the Outline Display in Outline View

- 1 Open the document with the outline, and then click the **Outline View** button.
- 2 Use the Outlining Tools to change the display in Outline view.
  - ◆ **Show Level.** Click the list arrow, and then select the level you want to display.
  - ◆ **Show Text Formatting.** Select or clear to show or hide text formatting.
  - ◆ **Show First Line Only.** Select to show the first line only.
- 3 When you're done, click the **Close Outline View** button.



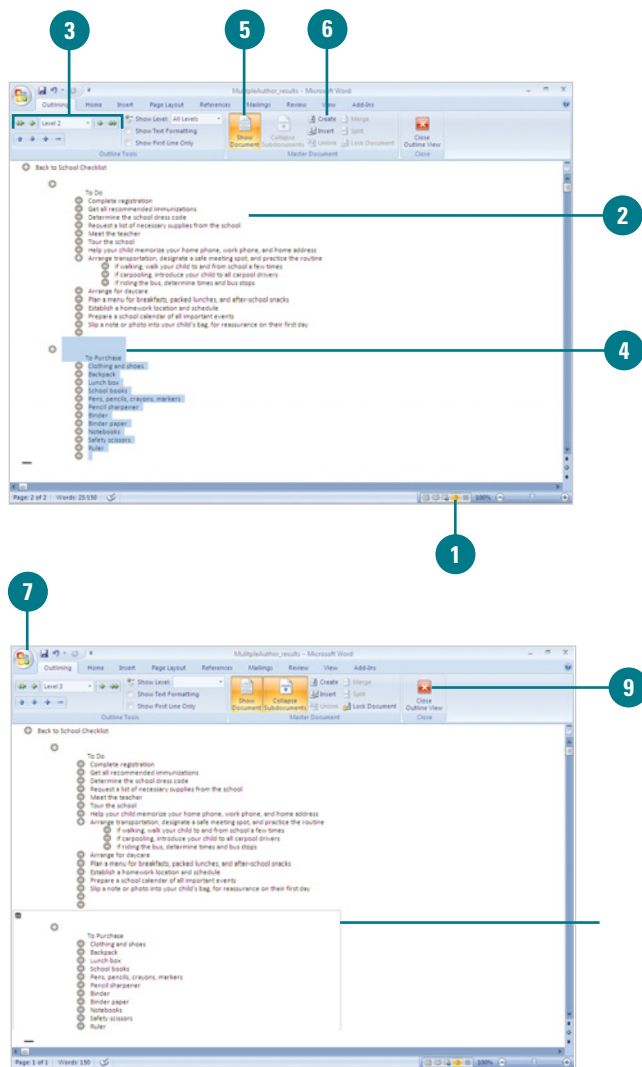
No formatting

# Creating a Multiple-Author Document

## Create a Master Document

- 1 In a new document, click the **Outline View** button.
- 2 Enter headings to outline the presentation of topics in the master document, pressing Enter after each entry.
- 3 Select a heading, and then click one of the buttons in Outline view to assign a heading style (Heading 1 through Heading 9).
  - ◆ Click the **Promote** or **Demote** button to increase or decrease the heading level of the headlines and body text.
- 4 Select the heading that you want to make into a subdocument.
- 5 Click the **Show Document** button.
- 6 Click the **Create Subdocument** button.
- 7 Click the **Office** button, point to **Save As**, and then click **Word Document**.
- 8 Select the location, type a name, and then click **Save**.
- 9 When you're done, click the **Close Outline View** button.

When several people are going to collaborate on a document by dividing the workload by section or heading, you can create a master document so that everyone can work concurrent with one another instead of passing one file around. The process of creating a master document begins with an outline. When the outline is complete, individual headings or sections can have subdocuments assigned to them. These subdocuments can be distributed to the collaborators and completed separately. When ready, they can then be combined back into the master document so that all the information is contained in a single file. After you have created a master document, those sections that you have designated as subdocuments can be created and saved as separate files. These files can then be reinserted into the master document as they are completed.



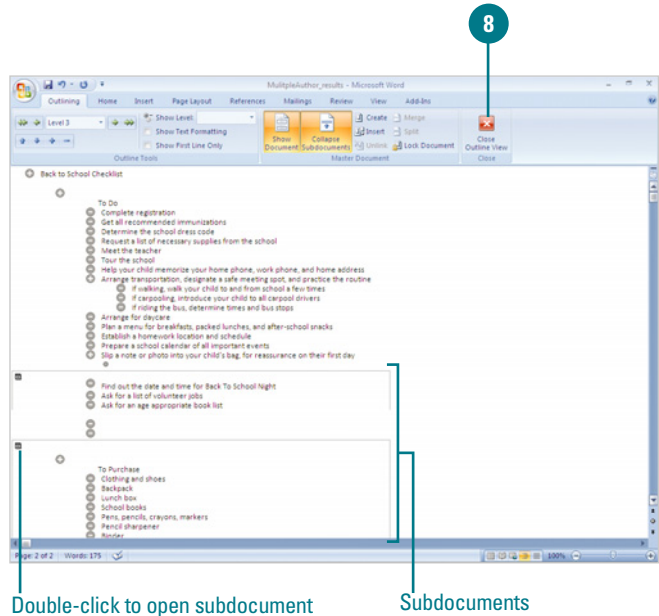
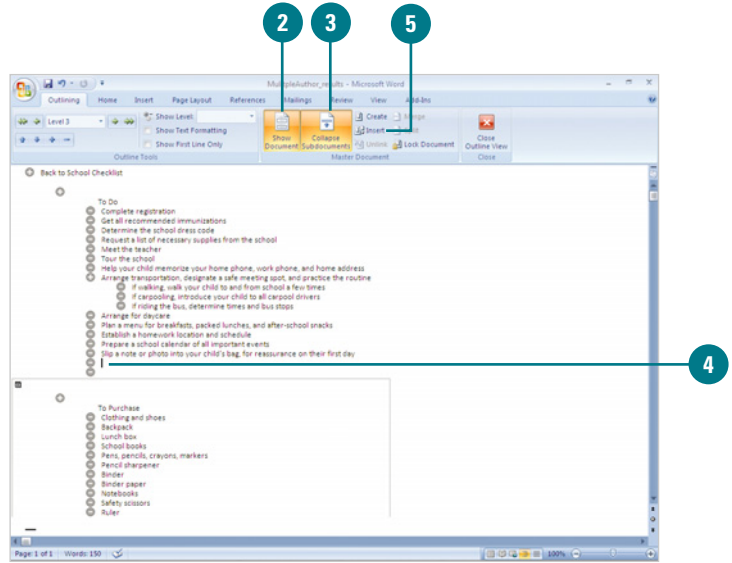
## Insert a Subdocument

- 1 Open the Master document in which you want to add a subdocument.
- 2 Click the **Show Document** button.
- 3 If the subdocuments are collapsed, click the **Expand Subdocument** button.
- 4 Position the insertion point where you want the subdocument inserted.
- 5 Click the **Insert Subdocument** button.
- 6 Locate and select the subdocument file you want to insert, and then click **Open**.
- 7 To open the subdocument, double-click the subdocument or Ctrl+click the subdocument link. Close the subdocument to return to the master document.
- 8 When you're done, click the **Close Outline View** button, and then click **Yes** to save, if necessary.

### Did You Know?

**You can collapse, or hide, all of your subdocuments.** To hide (collapse) the subdocuments in a master document, click the Collapse Subdocuments button in Outline view. All subdocuments are collapsed. To show (expand) the subdocuments, click the Expand Subdocuments button.

**You can lock and unlock a master document.** Click the Show Documents button in Outline view, select text in the master document, and then click Lock Document. To unlock, click Expand Subdocuments button to remove the lock on the files.



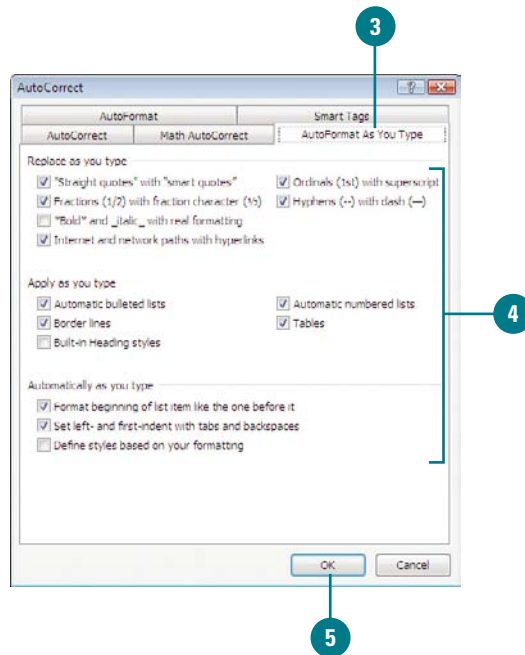
# Creating Documents Using Automatic Formatting

## Set Up Automatic Formatting As You Type

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**, then click **AutoCorrect Options**.
- 3 Click the **AutoFormat As You Type** tab.
- 4 Select or clear the AutoFormat check boxes you want to use.
- 5 Click **OK**.

Your choices take effect, but they only apply to text you will be entering subsequently. In this case, AutoFormat does not correct errors retroactively.

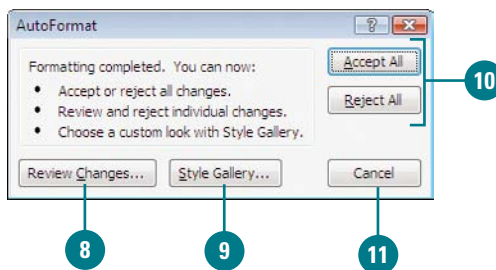
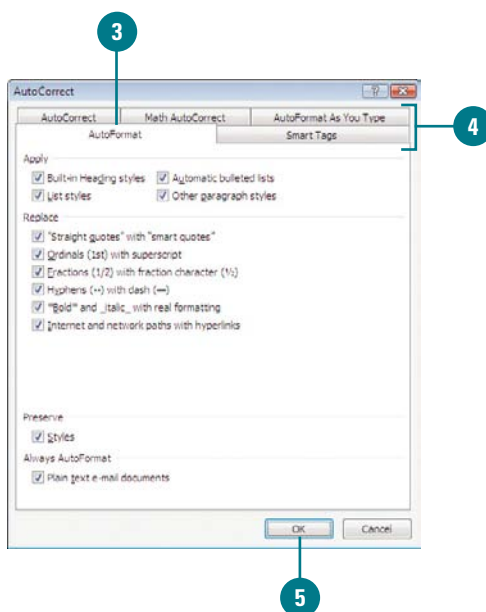
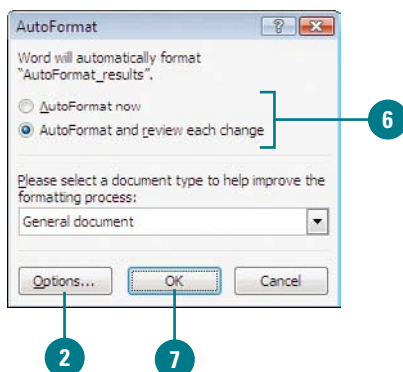
Word can automatically perform some formatting functions for you as you type a document. For example, you can change straight quotation marks to smart (curly) quotes, hyphens to en-dashes or em-dashes, an asterisk before and after text to bold text, or an underscore before and after text to italic text. You can also type a number and text or a bullet and text to start a numbered or bulleted list. If you had AutoFormat disabled when you created the document, you still have the option of using the feature to find and correct errors in formatting.



## Change Document Formatting with AutoFormat

- 1 Click the **AutoFormat** button on the Quick Access Toolbar.
  - ◆ The AutoFormat button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- 2 Click **Options**.
- 3 Click the **AutoFormat** tab to select the formatting options you want.
- 4 Click the other tabs to make any additional changes to your document.
- 5 Click **OK**.
- 6 Click the **AutoFormat now** option to have Word automatically format the document, or click the **AutoFormat and review each change** option to review, and then accept or reject each change.
- 7 Click **OK**.

If you chose the AutoFormat and review each change option, then continue.
- 8 Click **Review Changes** to look at changes individually.
- 9 Click **Style Gallery** if you want to preview your document, and then click **OK**.
- 10 Use the Accept and Reject buttons to accept or reject the review changes.
- 11 Click **Close** or **Cancel**.



# Creating Headers and Footers

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WD07S-1.2.2, WD07S-2.3.2,  
WD07S-4.1.3

## Create and Edit Headers and Footers

- 1 Click the **Insert** tab.
- 2 Click the **Header** or **Footer** button.
- 3 Click a built-in header or footer, or click **Edit Header** or **Edit Footer** to modify an existing one.

**TIMESAVER** Double-click a header or footer to edit it.

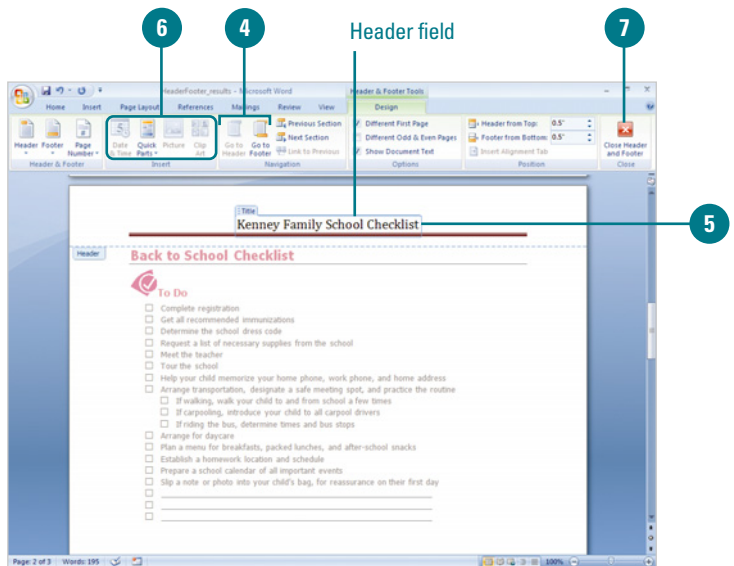
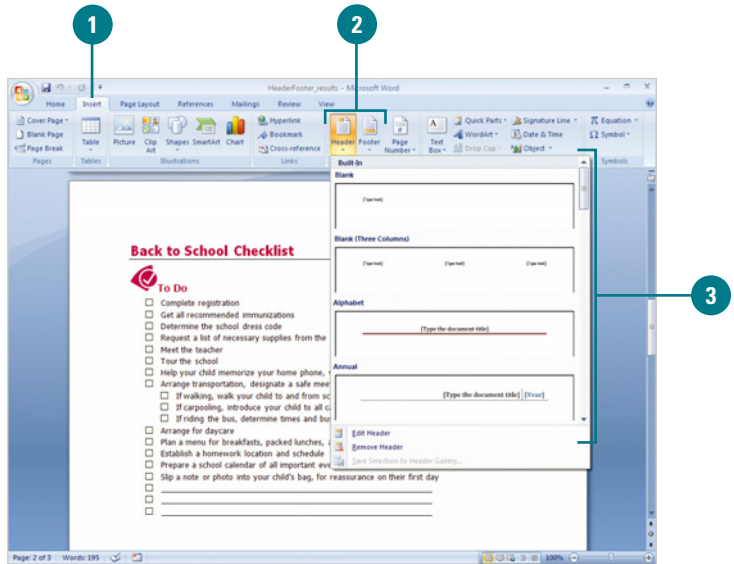
The Design tab under Header & Footer Tools displays on the Ribbon.

- 4 If necessary, click the **Go to Header** or **Go to Footer** button on to display the header or footer text area.
- 5 Click the header or footer box, and then type the text you want. Edit and format header or footer text as usual.
- 6 To insert common items in a header or footer, click a button (**Date & Time**, **Quick Parts**, **Picture**, or **Clip Art**) in the Insert group.
- 7 When you're done, click the **Close Header and Footer** button.

### Did You Know?

**You can quickly remove a header or footer.** Click the Insert tab, click the Header or Footer button, and then click Remove Header or Remove Footer.

Most books, including this one, use headers and footers to help you keep track of where you are. A **header** is text printed in the top margin of every page within a document. **Footer** text is printed in the bottom margin. Commonly used headers and footers contain your name, the document title, the filename, the print date, and page numbers. If you divide your document into sections, you can create different headers and footers for each section.



## Create Different Headers and Footers for Different Pages

- 1 Click the **Insert** tab.
- 2 Click the **Header** or **Footer** button.
- 3 Click a built-in header or footer, or click **Edit Header** or **Edit Footer** to modify an existing one.

The Design tab under Header & Footer Tools displays on the Ribbon.

- 4 To create different headers or footers for odd and even pages, click to select the **Different Odd & Even Pages** check box.

To create a unique header or footer for the document's first page, click to select the **Different First Page** check box.

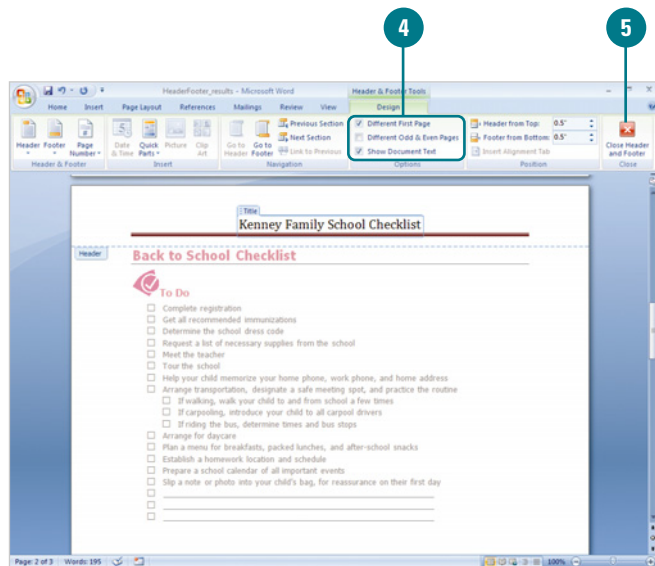
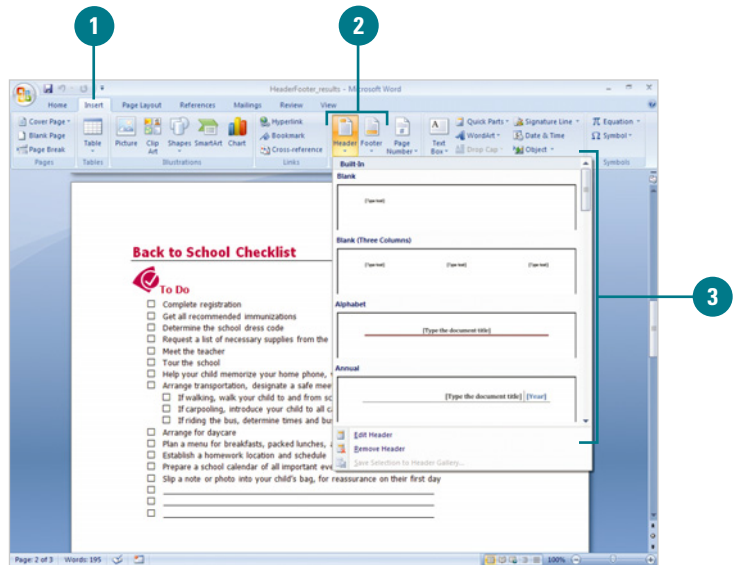
To show document text, select the **Show Document Text** check box.

- 5 When you're done, click the **Close Header and Footer** button.

### Did You Know?

**You can change header and footer position.** Double-click the header or footer you want to change, and then adjust the Header from Top or Footers from Bottom settings on the Ribbon.

**There are default tab stops used to align header and footer text.** Typically, headers and footers have two default tab stops. The first, in the middle, centers text. The second, on the far right, aligns text on the right margin. To left align text, don't press Tab. You can add and move the tab stops as needed. In addition, you can use the alignment buttons on the Home tab.



# Inserting Page Numbers and the Date and Time

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WD07S-1.2.2

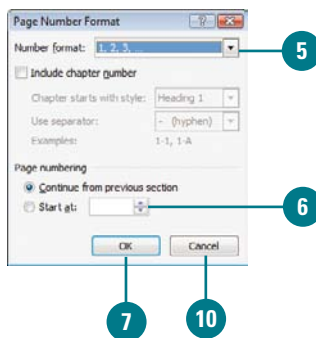
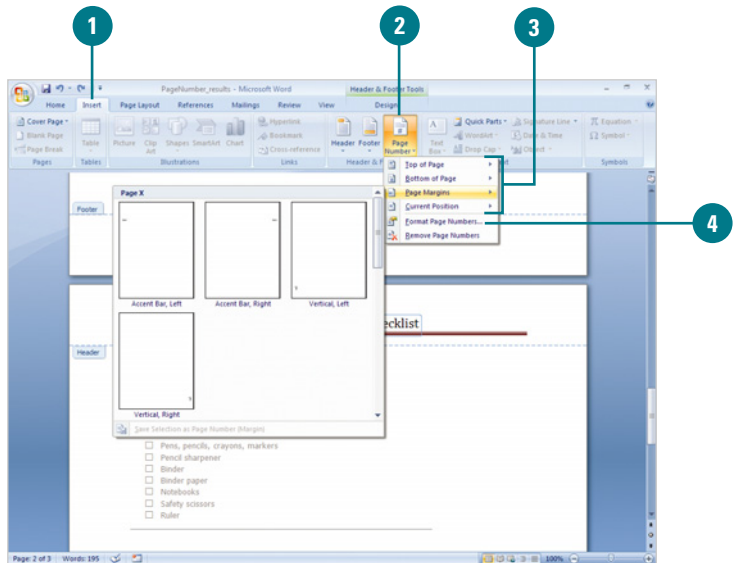
## Insert and Format Page Numbers

- 1 Click the **Insert** tab.
- 2 Click the **Page Number** button.
- 3 Point to the position you want (**Top of Page, Bottom of Page, Page Margins, or Current Position**), and then select a position.
- 4 Click the **Page Number** button, and then click **Format Page Numbers**.
- 5 Click the **Number format** list arrow, and then select a numbering scheme.
- 6 Select the starting number.
- 7 Click **OK**.

### Did You Know?

*You can quickly remove page numbers.* Click the Insert tab, click the Page Number button, and then click Remove Page Numbers.

Page numbers help you keep your document in order or find a topic from the table of contents. Number the entire document consecutively or each section independently; pick a numbering scheme, such as roman numerals or letters. When you insert page numbers, you can select the position and alignment of the numbers on the page. The date and time field ensures you know which printout is the latest. Word uses your computer's internal calendar and clock as its source. You can insert the date and time for any installed language. Add page numbers and the date in a footer to conveniently keep track of your work.



## Insert the Date or Time

1 To insert the date or time on a single page, display the page, and then click the **Insert** tab.

- ◆ To place the date or time on every page, display or insert a header or footer.

The Design tab under Header & Footer Tools displays on the Ribbon.

2 Click to place the insertion point where you want to insert the date or time.

3 Click the **Date & Time** button.

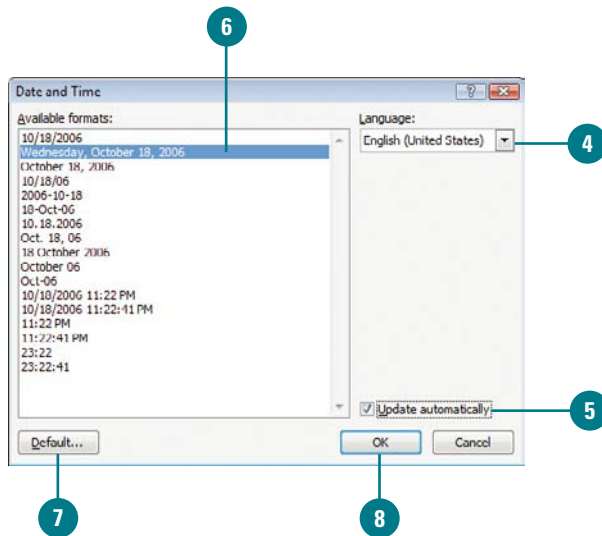
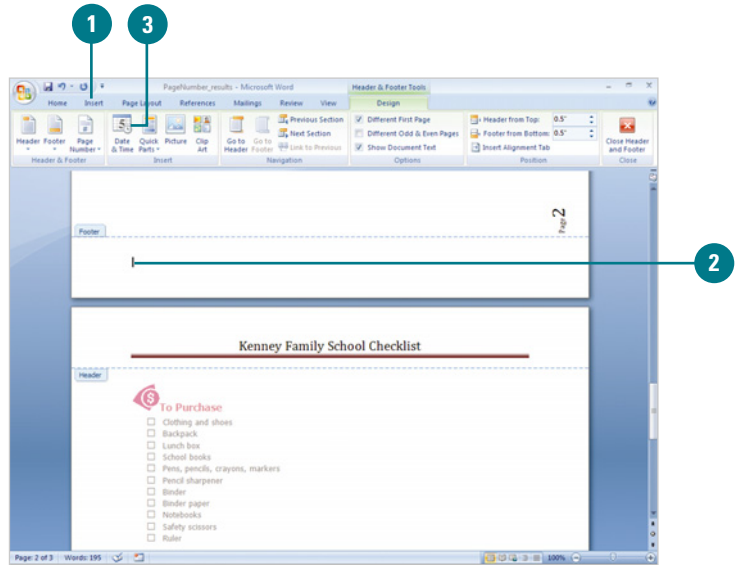
4 If necessary, click the **Language** list arrow, and then select a language.

5 To have the date or time automatically update, select the **Update automatically** check box.

6 Click the date and time format you want.

7 To set the current date and time (based on your computer clock) as the default, click **Default**, and then click **Yes**.

8 Click **OK**.



# Inserting Cross References

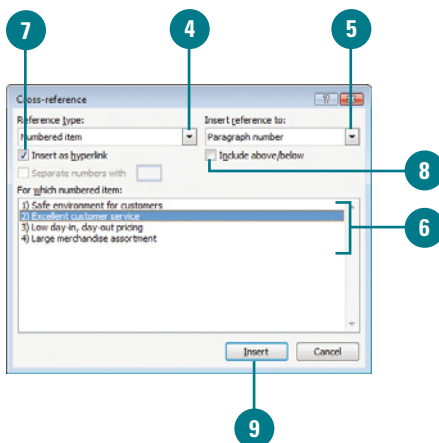
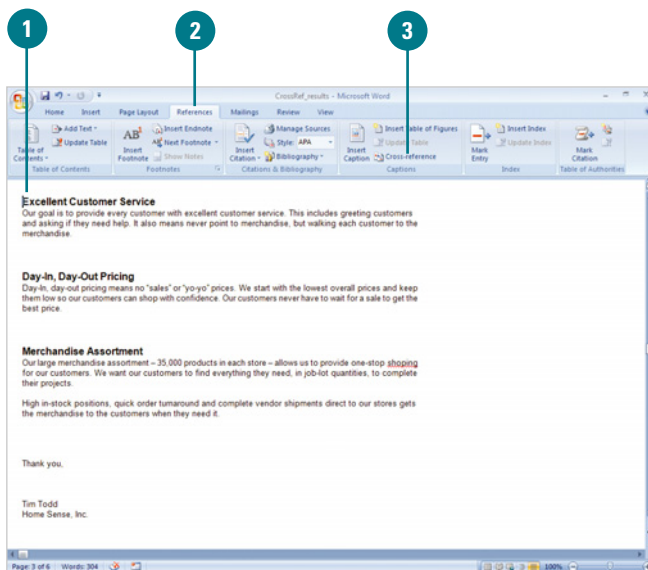
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WD07S-4.4.3,  
WD07S-4.4.4

## Create a Cross Reference

- 1 Select the text that starts the cross reference in the document.
- 2 Click the **References** tab.
- 3 Click the **Cross-Reference** button.
- 4 Click the **Reference type** list arrow, and then select the type of item to which you will refer (heading, footnote, bookmark, etc.).
- 5 Click the **Insert reference to** list arrow, and then select the type of data (page, paragraph number, etc.) that you will be referencing.
- 6 Click the specific item, by number, to which you want to refer.
- 7 To let users move to the referenced item, select the **Insert as hyperlink** check box.
- 8 To include data regarding the relative position of the referenced item, select the **Include above/below** check box.
- 9 Click **Insert**.
- 10 Repeat the steps for each additional cross reference that you want to insert into the document, and then click either **Close** or **Cancel**.

Cross references direct the reader to related information located elsewhere in the document. Cross references can refer to figures or illustrations, sidebars, section headings, even individually marked paragraphs. Without distracting the reader of the document, cross references can be an easy tool to help navigate through a larger document. You can cross-reference only items in the same document. To cross-reference an item in another document, you need to first combine the documents into a master document.



# Preparing for a Bound Document

## Change the Gutter Margin Setting

- 1 Click the **Page Layout** tab.
- 2 Click the **Page Setup** Dialog Box Launcher.
- 3 If necessary, click the **Margins** tab.
- 4 Enter a value for the gutter margin.
- 5 Click the **Gutter Position** list arrow, and then click **Left** or **Top** depending on the orientation of your intended binding (Left would be for a normal book, Top would be for a book that flips open from top to bottom).
- 6 Click **OK**.

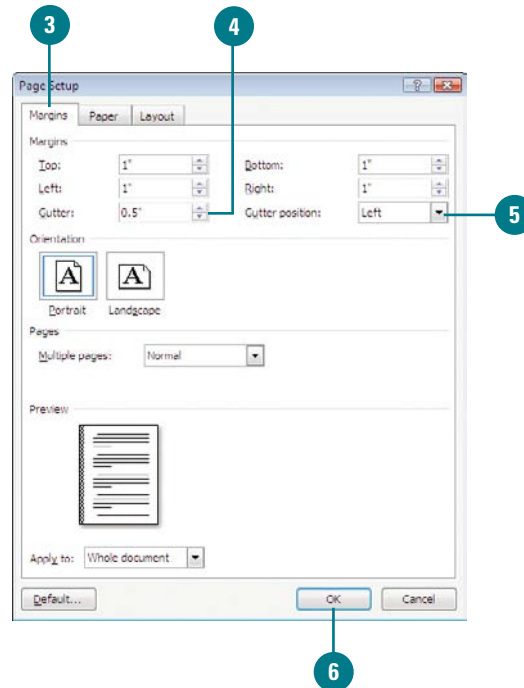
### Did You Know?

#### **You can set aside a gutter for printing.**

The size of the gutter you should use varies greatly depending on the binding process that will be used. Check with your printer before finalizing this setting to ensure that you allow the correct amount of space.

**You can use a gutter even if you are printing on both sides.** Remember that, if you are using double-sided printing, the gutter will be to the left on odd-numbered pages and to the right on even-numbered pages.

If your finished document will be bound in some fashion, especially if you will use a form of binding such as is found in books, you must allow additional margin space for the binding process; otherwise some of your text can be in the binding fold and therefore unreadable. If you open a book, the crease between the two facing pages is referred to as the gutter. You must take care to ensure that nothing except white space is in the gutter.

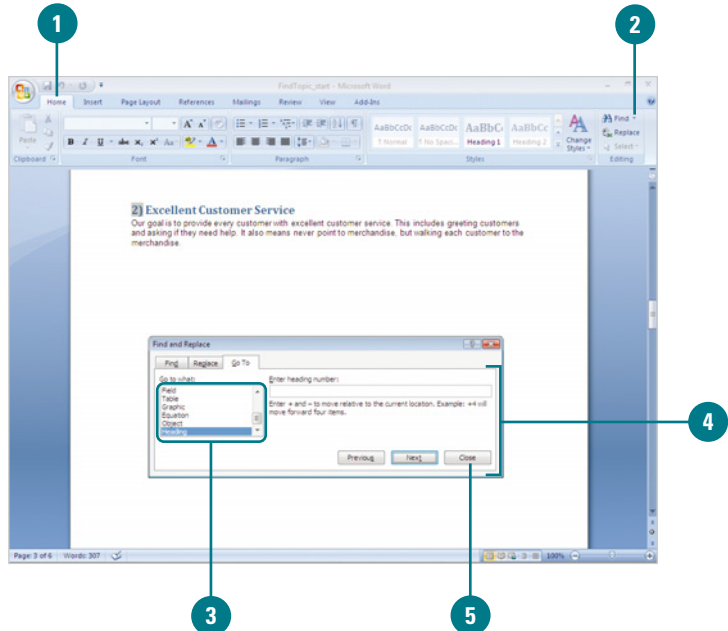


# Finding Topics in a Long Document

## Move to a Specific Page or Other Document Item

- 1 Click the **Home** tab.
- 2 Click the **Find** button arrow, and then click **Go To**.
- 3 Click the type of item to which you want to move to (page, table, etc.).
- 4 Use one of the following methods:
  - ◆ To move to a specific item, type the name or number of the item in the Enter box, and then click **Go To**.
  - ◆ To move to the next or previous item of the same type, leave the Enter box empty, and then click **Next** or **Previous**.
- 5 Click **Close**.

Instead of searching through pages of text in your document for that certain paragraph, bookmark, tables, footnote or endnote, caption, or other object, you can navigate a lengthy document using the Find and Replace dialog box. Providing that you have set up your long document with bookmarks, captions, object numbers and the like, you will be able to use those as “clues” in which to locate the specific items you are looking for.

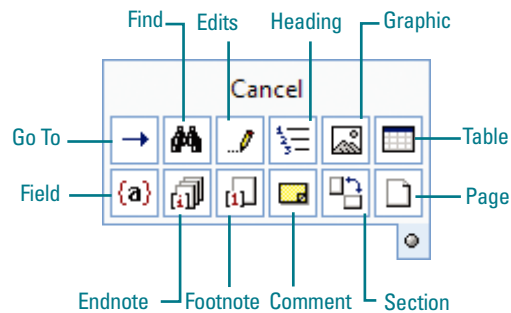
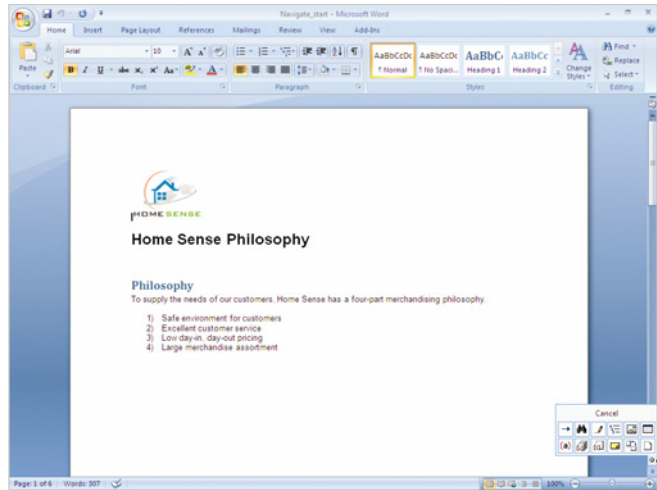


# Navigating a Long Document

## Select a Browse Object

- 1 Click the **Select Browse Object** button on the vertical scroll bar.
- 2 Click the icon that represents the browse command you want to activate:
  - ◆ **By Field.** Click to browse by field.
  - ◆ **By Endnote.** Click to browse by Endnote.
  - ◆ **By Footnote.** Click to browse by Footnote.
  - ◆ **By Comment.** Click to browse by comment.
  - ◆ **By Section.** Click to browse by section.
  - ◆ **By Page.** Click to browse by page.
  - ◆ **Go To.** Click to go to a specific item.
  - ◆ **Find.** Click to find an item.
  - ◆ **By Edits.** Click to browse by edits.
  - ◆ **By Heading.** Click to browse by heading.
  - ◆ **By Graphic.** Click to browse by graphic.
  - ◆ **By Table.** Click to browse by table.

Word also includes a very unobtrusive, but powerful tool on the vertical scroll bar, the Select Browse Object button. Now that you might be working with a large document and need to navigate through pages of text, multiple graphics and tables, numerous footnotes, reviewer comments and the like, the Select Browse Object button becomes a useful tool. You can navigate through pages easily, instead of relying on all the various commands that are available to locate similar elements of your long document.



# Inserting a Table of Contents

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## Insert a Table of Contents

- 1 Position the insertion point where you want the table of contents.
- 2 Click the **References** tab.
- 3 Click the **Table of Contents** button.
- 4 Do one of the following:
  - ◆ **Add.** Click a Table of Contents style from the gallery.
  - ◆ **Remove.** Click **Remove Table of Contents**.
  - ◆ **Customize.** Click **Insert Table of Contents**, click the **Table of Contents** tab, select the format, levels, and options you want, and then click **OK**.

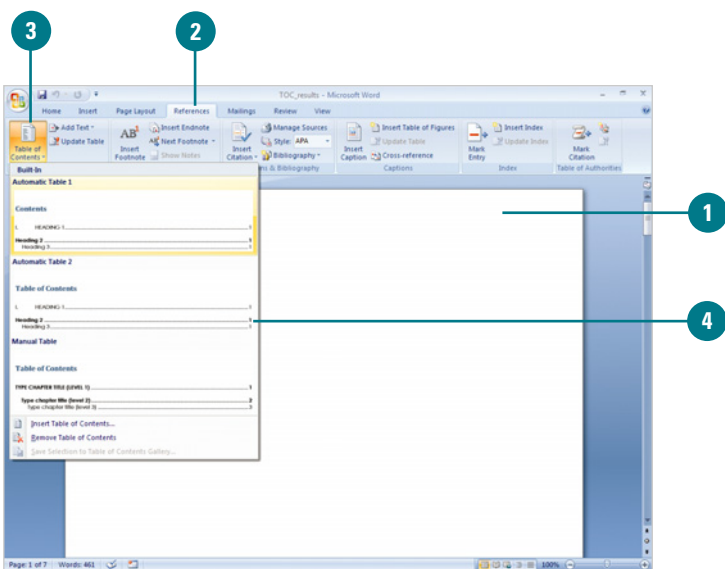
### Did You Know?

**You can update the table of contents.**

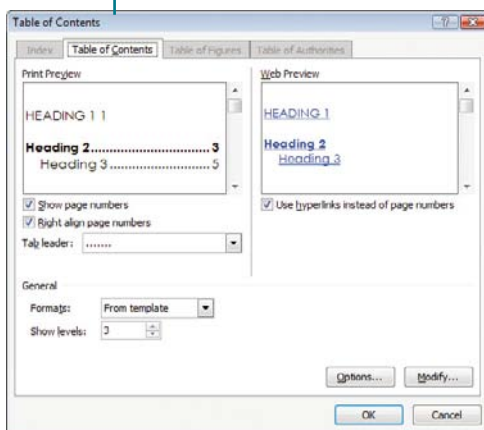
As you continue to add information to a document, you can quickly update the table of contents. Click the References tab, click Update Table, and then click Update page numbers or Update entire table. You can also click Update Table on the tab when you select the table of contents.

**You can add a specific paragraph to the table of contents.** Select the paragraph you want to add, click the References tab, and then click the Add Text button.

A **table of contents** provides an outline of main topics and page locations. Word builds a table of contents based on the styles in a document that you choose. By default, Heading 1 is the first-level entry, Heading 2 the second level, and so on. In a printed table of contents, a **leader**, a line whose style you select, connects an entry to its page number. In Web documents, entries become hyperlinks. Hide nonprinting characters before creating a table of contents so text doesn't shift to other pages as you print.



Use to customize a Table of Contents

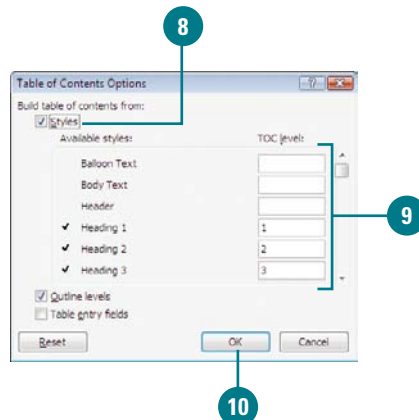
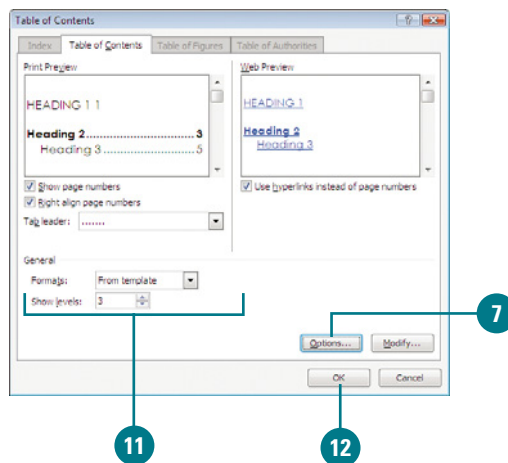
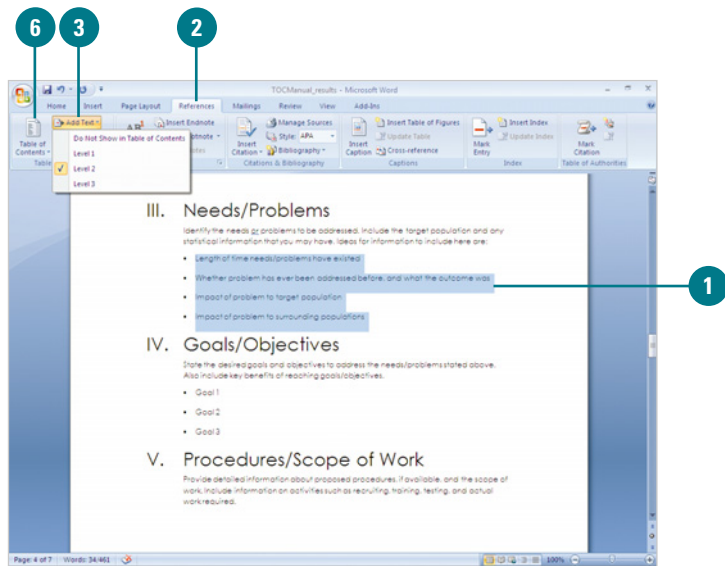


## Create a Table of Contents Manually

- 1 Select the text you want to include in your table of contents.
- 2 Click the **References** tab.
- 3 Mark entries using heading styles or individual text.
  - ◆ **Heading styles.** Click the heading style you want in the Styles group on the Home tab.
  - ◆ **Individual text.** Click the **Add Text** button, and then click the table of contents level you want: **Level 1**, **Level 2**, or **Level 3**.
- 4 To mark additional entries, select the text, use the options in Step 3.
- 5 Click the place where you want to insert the table of contents.
- 6 Click the **Table of Contents** button, and then click **Insert Table of Contents**.
- 7 Click **Options**.
- 8 Select the **Styles** check box.
- 9 Specify the TOC levels you want to use.
- 10 Click **OK**.
- 11 Select the formatting options you want.
- 12 Click **OK**.

### Did You Know?

**You can delete a table of contents.** Click the References tab, click Table of Contents, and then click Remove Table of Contents.



# Creating an Index

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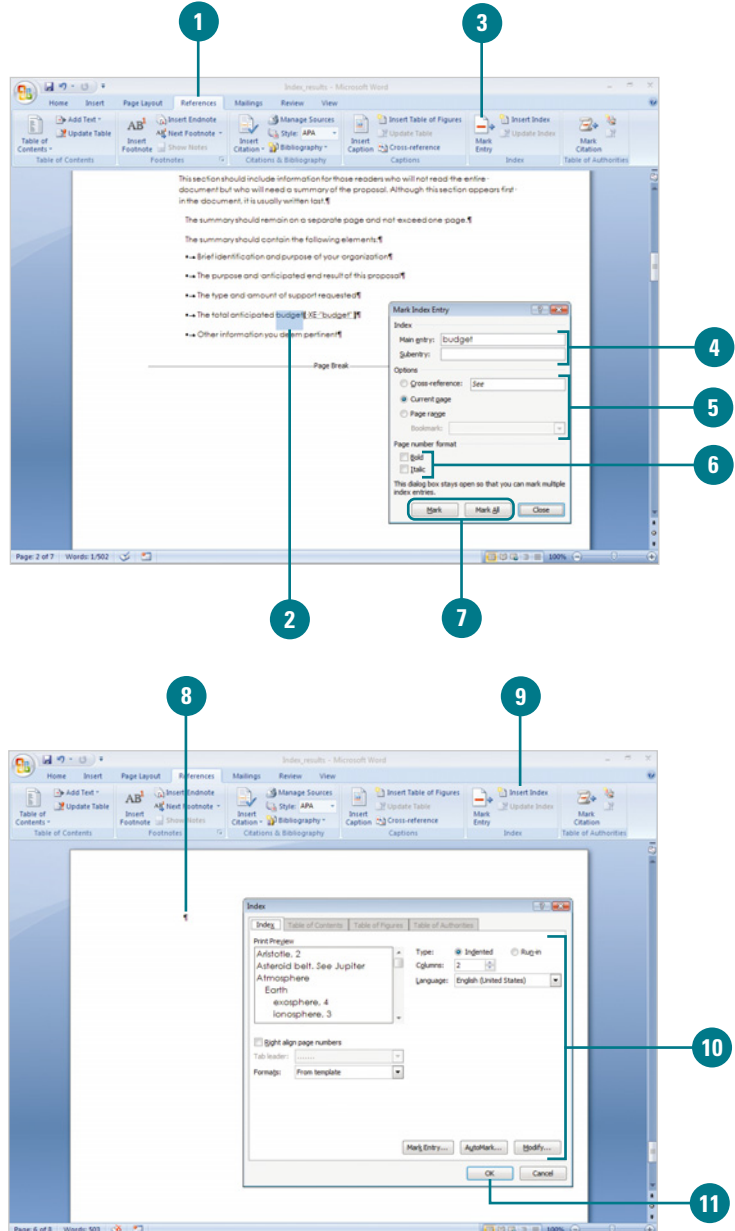
## Create an Index

- 1 Click the **References** tab.
- 2 To use existing text as an index entry, select the text. To enter your text as an index entry, click at the point where you want the index entry inserted.
- 3 Click the **Mark Entry** button or press Alt+Shift+X.
- 4 Type or edit the entry. The entry can be customized by creating a sub-entry or a cross-reference to another entry.
- 5 To format the text for the index, right-click it in the Main Entry or Sub-entry box, click **Font**, select your formatting options, and then click **OK**.
- 6 To select a format for the page numbers that will appear in the index, select the **Bold** or **Italic** check boxes.
- 7 To mark the index entry, click **Mark** or **Mark All** for all similar text.

Repeat steps 2-7 for additional index entries, and then click **Close**.

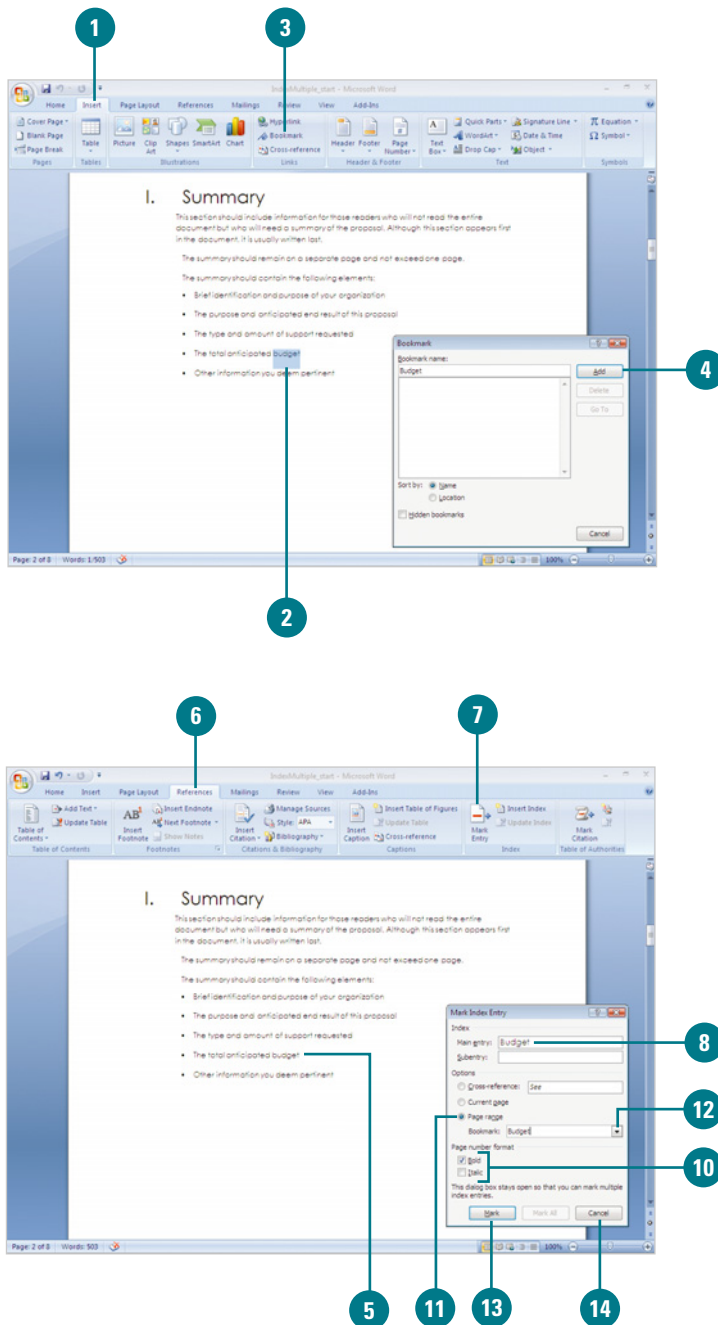
- 8 Go to the page where you want to display your Index.
- 9 Click the **Insert Index** button.
- 10 Click the **Index** tab, and then select any options you want.
- 11 Click **OK**.

An index appears at the end of a document and alphabetically lists the main topics, names, and items used in a long document. Each index listing is called an entry. You can create an index entry for a word, phrase, or symbol for a topic. In an index, a cross-reference indicates another index entry that is related to the current entry. There are several ways to create an index. Begin by marking index entries. Some index entries will refer to blocks of text that span multiple pages within a document.



## Create Multiple Page Index Entries

- 1 Click the **Insert** tab.
- 2 Select the text in which you want the index entry to refer.
- 3 Click the **Bookmark** button.
- 4 Enter a name, and then click **Add**.
- 5 Click after the end of the text in the document that you just marked with a bookmark.
- 6 Click the **References** tab.
- 7 Click the **Mark Entry** button or press Alt+Shift+X.
- 8 Enter the index entry for the marked text.
- 9 To format the text for the index, right-click the Main Entry or Sub-entry box, click **Font**, select your formatting options, and then click **OK**.
- 10 To select a format for the page numbers that will appear in the index, select the **Bold** or **Italic** check boxes.
- 11 Click the **Page Range** option.
- 12 Select the bookmark name you entered in Step 4.
- 13 Click **Mark**.
- 14 Repeat steps 2-13 for additional index entries, and then click **Close** or **Cancel**.



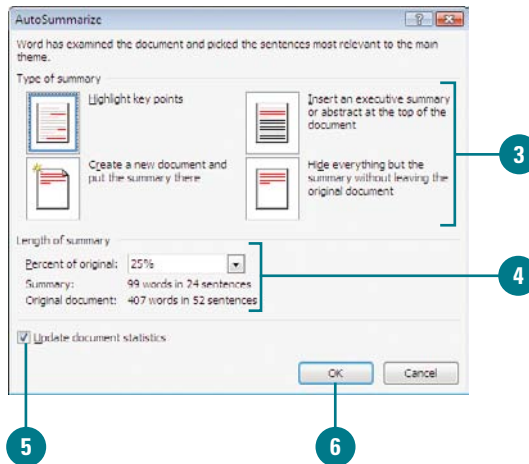
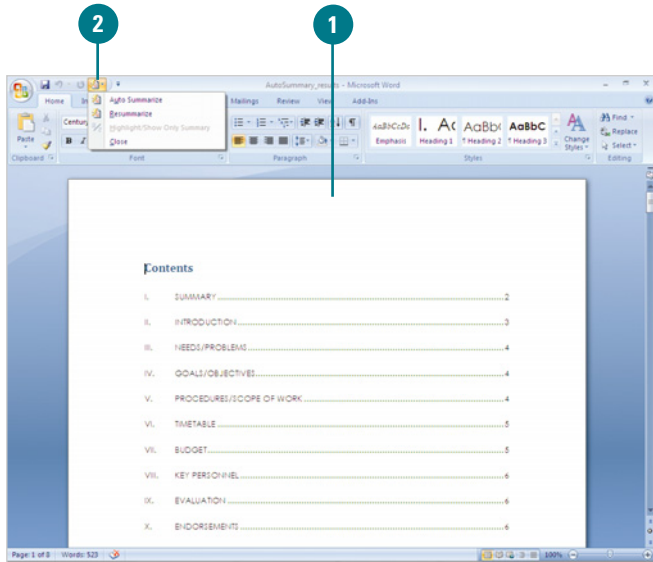
# Creating a Summary

## Create a Summary of a Document

- 1 Open the document you want to summarize.
- 2 Click the **AutoSummarize** button on the Quick Access Toolbar, and then click **Auto Summarize**.
  - ◆ The AutoSummarize button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- 3 Select the type of summary you want.
- 4 Enter the length of your summary. The higher the percentage, the greater the detail.
- 5 To maintain your existing keywords and comments on the Summary tab in the Properties dialog box, clear the **Update document statistics** check box.
- 6 Click **OK**.

**TROUBLE?** Press **Esc** to cancel a summary in progress.

If you are preparing an executive summary of a lengthy document for business purposes, or have some other reason to condense the high points of a document for your reader, you can use AutoSummarize to help you get started. AutoSummarize looks through your document and tries to summarize the material based on the type of summary you want and the percentage of the original you specify. After Word summarizes the material, you'll need to review it and make necessary changes.



# Determining Word Count Statistics

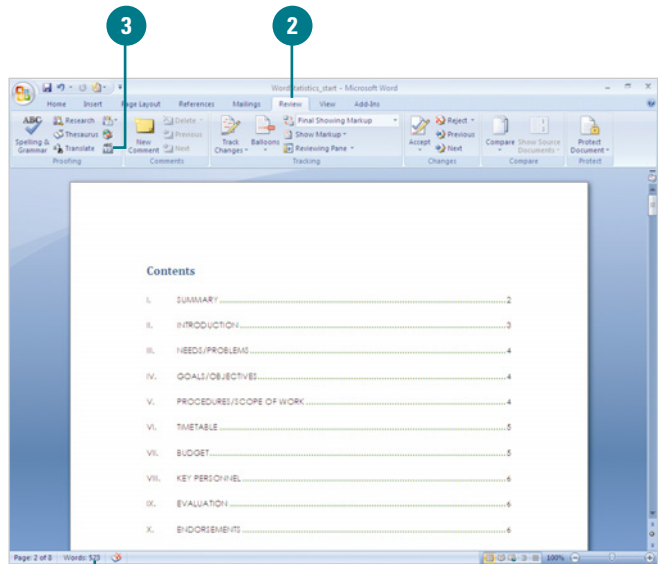
## Find Out Document Word Count Statistics

- 1 If you want to find out statistics for only part of a document, select the text you want to count.
- 2 Click the **Review** tab.
- 3 Click the **Word Count** button.
- 4 Select or clear the **Include textboxes, footnotes, and endnotes** check box.
- 5 Click **Close**.

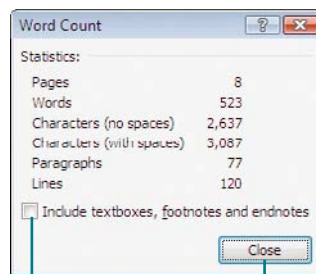
### Did You Know?

*You can count words in a text box.* Select the text in the text box. The Status bar displays the number of words. To count the words in multiple text boxes, press and hold Ctrl while you select the text in each text box.

Producing lengthy documents for business, school or as contract work can often be regulated by the word count. Legal briefs may charge by the line or word, or school papers might need to be a certain length in word count. Either way, if you need to determine your word count, there is an easier way than counting each word manually. You can quickly determine the number of words in your document by viewing the Status bar (**New!**). It appears in the lower-left corner next to the number of pages in your document. You can also use the Word Count button on the Review tab to find out word count statistics, including number of pages, characters, paragraphs, and lines. You have the choice whether to include or exclude text boxes, footnotes, and endnotes in the word count statistics.



Word count



4

5

# Adding a Cover Page

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Application  
Specialist

WD07S-1.1.6

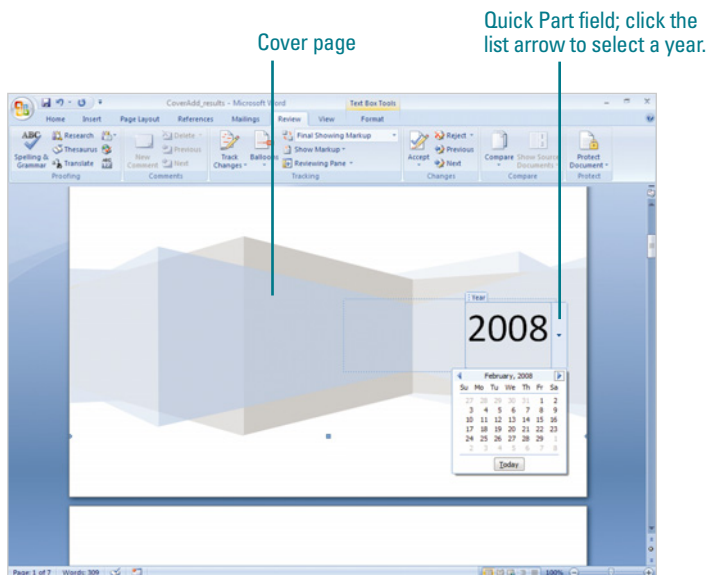
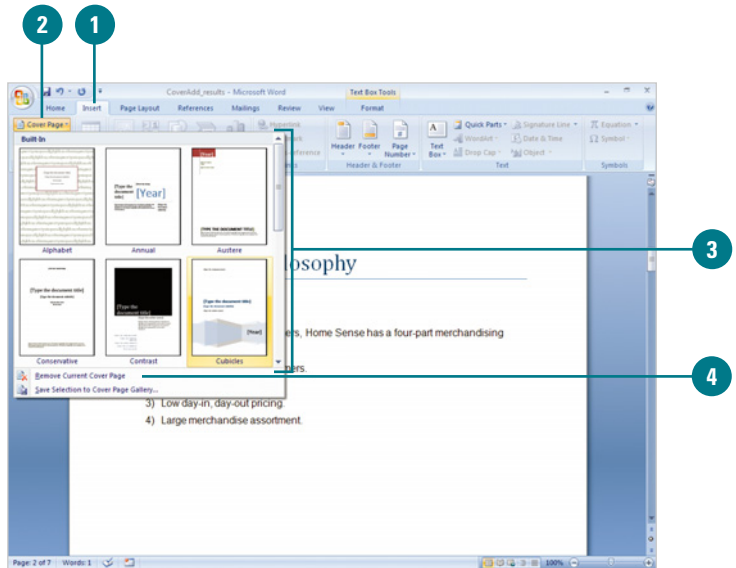
## Insert a Cover Page

- 1 Click the **Insert** tab.
- 2 Click the **Cover Page** button to display a gallery of cover pages.
- 3 Click the cover page you want.

Word inserts a cover at the beginning of your document. You can click

- 4 To remove a cover page, click the **Cover Page** button, and then click **Remove Current Cover Page**.

A cover page provides an introduction to a report, or an important memo you want to circulate to others. Word makes it easy to add a cover page to any document (**New!**). You can quickly select one from a gallery of styles that fit your document. Each cover page includes text boxes sample text, which you can change, and defined fields, such as a title and author's name, that automatically get filled in with information from document properties.



# Working with Technical Documents

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## Introduction

Microsoft Office Word 2007 has many additional features that help you develop a more technical document. Research papers, business proposals and the like, all require more than just a document with some graphics or special text formatting.

You can find research material and incorporate it into your work quickly and easily. You can access informational services and insert the material right into your document without leaving Word. Material such as dictionaries, thesauruses, research sites, language translations, stock quotes, and company information are all at your finger tips.

With all of this research, it might be necessary to create footnotes or endnotes to reference your sources. You can format the notes to be similar in text to your document, or have an entirely different look. When working with a lot of text, you can create a bookmark to help you jump to various topics in your document.

Creating captions for your graphics is easy with Word. Once you've created captions, you can create a Table of Figures—similar to a Table of Contents, but this item keeps track of your graphics. You can format text in your document to have number lines. This is helpful if you need to locate a specific section of text—such as a legal briefing—in a long document. You can also create an outline in Word to help organize your document.

Some more technical features such as summing up the values in your tables and calculating values, are done with the help of Word's Formula feature. You can also document an equation for that scientific or mathematical paper.

## What You'll Do

**Insert Building Blocks Using Quick Parts**

**Insert and Create AutoText**

**Insert Research Material**

**Create Footnotes or Endnotes**

**Modify Footnotes or Endnotes**

**Format Footnotes or Endnotes**

**Create a Bibliography**

**Create a Bookmark**

**Create Captions**

**Create a Table of Figures**

**Number Lines**

**Create an Equation**

**Insert a Symbol**

# Inserting Building Blocks Using Quick Parts

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WD07S-4.1.4

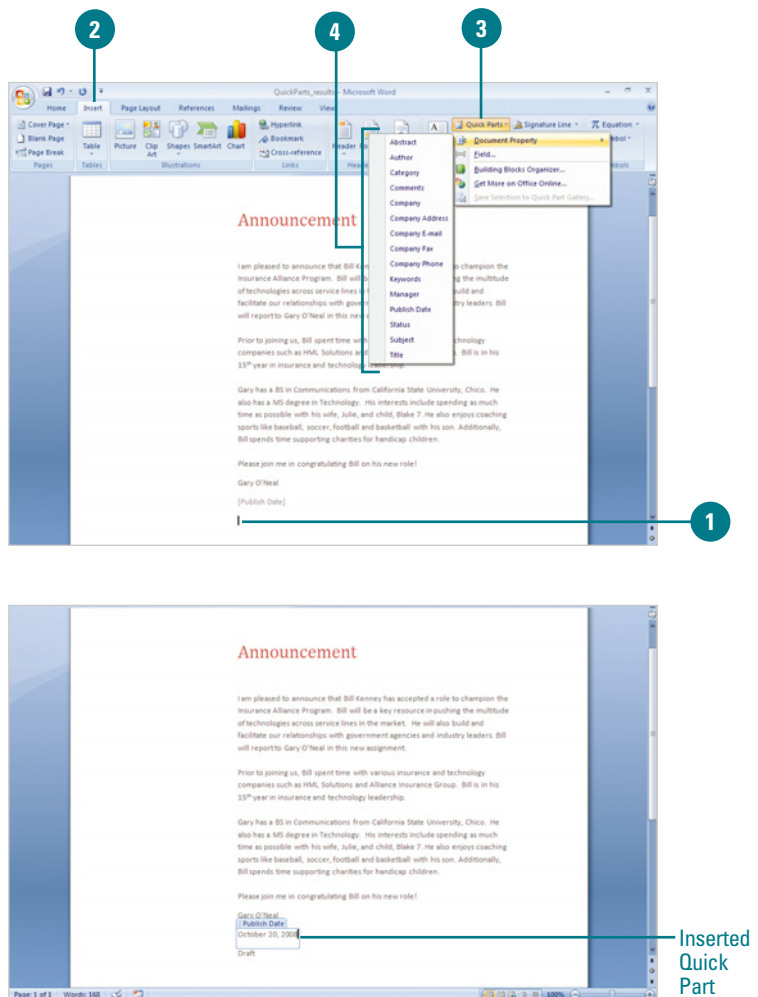
## Insert a Building Block Using Quick Parts

- 1 Click where you want to insert a text box.
- 2 Click the **Insert** tab.
- 3 Click the **Quick Parts** button.
- 4 Point to **Document Property**, and then click the predefined Quick Part you want to insert.

### Did You Know?

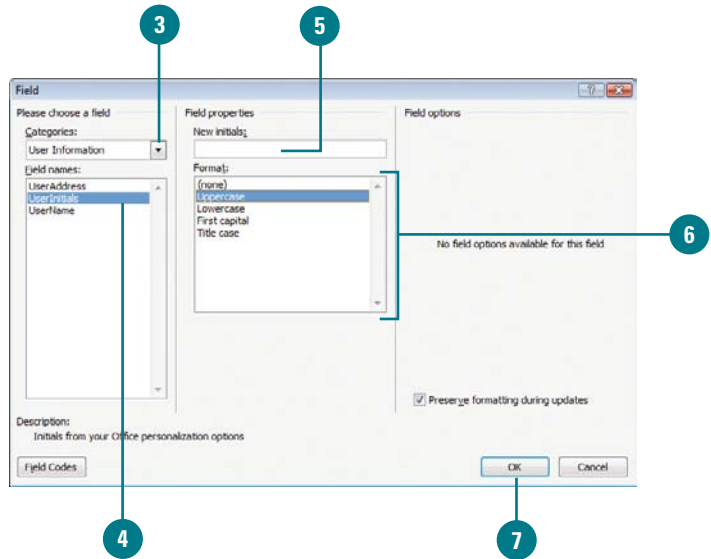
**You can create your own Quick Part.** Select the text box you want to use, click the Insert tab, click the Quick Parts button, and then click Save Selection to Quick Parts Gallery.

A **Quick Part (New!)** is a defined field or set of fields that contains information you can use throughout a document. Word calls these building blocks. Instead of typing the company name, address and phone number every time you need it in a document, you can insert a text box field with the information. Word provides a variety of defined Quick Parts—including Author, Company, Company Address, Company E-mail, Manager and Status—you can quickly insert in a document. The Quick Part fields insert information you provide in Document Properties or a placeholder, which you can fill in the first time. If a predefined field doesn't meet your needs, you can create your own or get more on Office Online. If you need to modify a Quick Part, you can use the building block organizer, which stores your custom Quick Parts and those provided by Word. Word uses Quick Parts as part of the program to build page covers, headers and footers, pull quotes, and side bar to name a few.



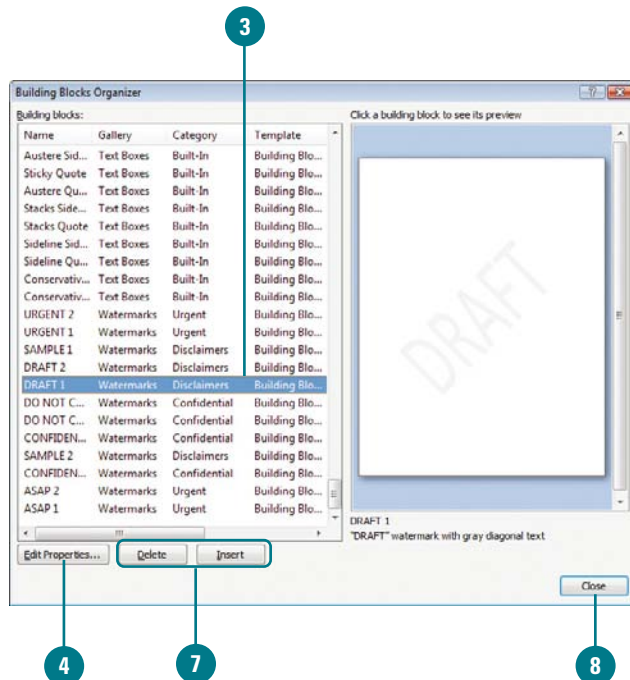
## Create a Quick Part Field

- 1 Click the **Insert** tab.
- 2 Click the **Quick Parts** button, and then click **Field**.
- 3 Click the **Categories** list arrow, and then click a category to narrow down the field names.
- 4 Click the field name you want to use.
- 5 Specify field property information.
- 6 Click the format you want to apply.
- 7 Click **OK**.



## Work with Building Blocks

- 1 Click the **Insert** tab.
- 2 Click the **Quick Parts** button, and then click **Building Blocks Organizer**.
- 3 Select the Quick Part building block you want to modify.
- 4 Click **Edit Properties**.
- 5 Specify the properties you want to change, including Name, Gallery, Category, Description, Save in, and Options.
- 6 Click **OK**.
- 7 To insert or delete a building block, select it, and then click **Insert** or **Delete**.
- 8 Click **Close**.

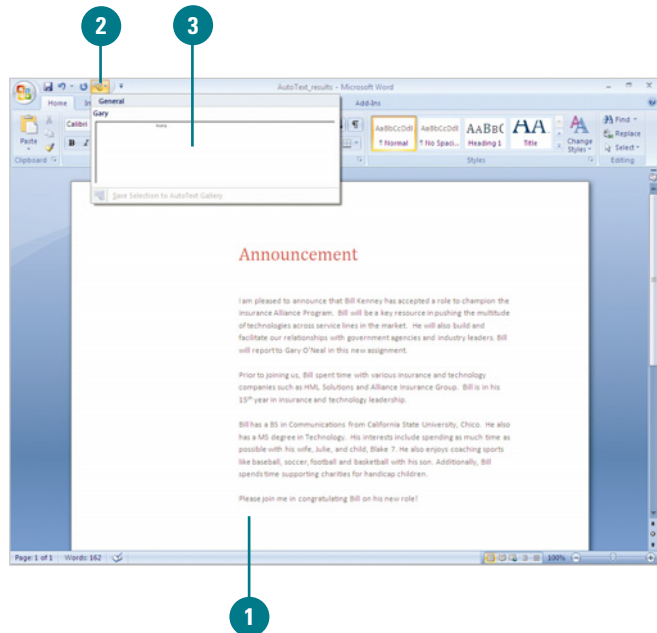


# Inserting and Creating AutoText

## Insert AutoText from the AutoText Gallery

- 1 Click where you want to insert AutoText.
- 2 Click the **AutoText** button on the Quick Access Toolbar.
  - ◆ The AutoText button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- 3 Click the AutoText entry you want from the AutoText gallery.

**AutoText** stores text and graphics you want to reuse, such as a company logo, boilerplate text, or formatted table. For example, you can use AutoText to quickly insert the text To Whom It May Concern or a graphic of your signature. You can use the AutoText entries that come with Word, or create your own. AutoText is part of Word's building block approach to creating customized documents (**New!**). Word calls these building blocks. To insert AutoText, you use the AutoText button on the Quick Access Toolbar. The AutoText button is not on the Quick Access Toolbar by default, so you need to use the Customize pane in Word Options to add the button.



## Create AutoText

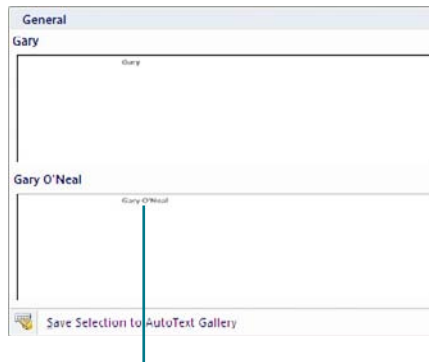
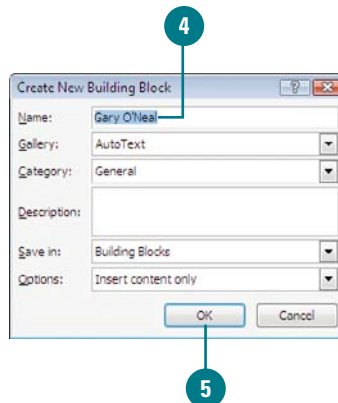
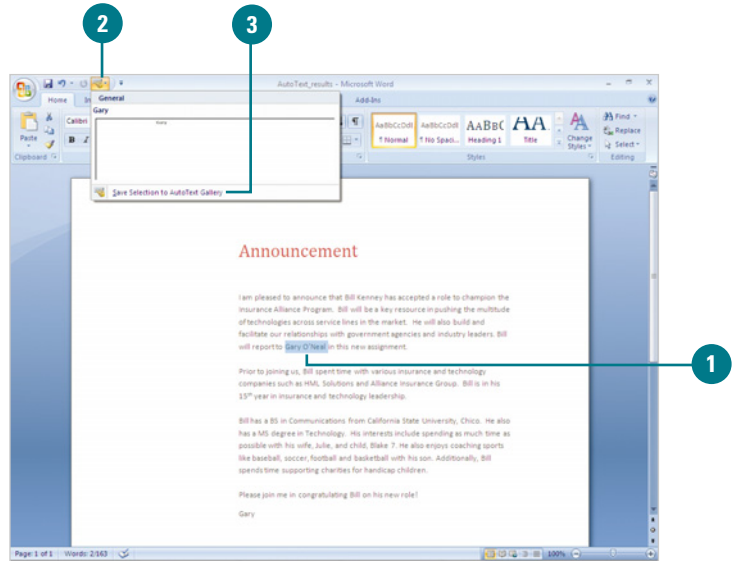
- 1 Select the text or graphic in which you want to create an AutoText entry.
- 2 Click the **AutoText** button on the Quick Access Toolbar.
  - ◆ The AutoText button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- 3 Click **Save Selection to AutoText Gallery**.

The Create New Building Block dialog box opens, displaying the

- 4 Type an AutoText name, or use the suggested one.
- 5 Click **OK**.

### Did You Know?

**You can delete an AutoText entry.** Click the AutoText button on the Quick Access Toolbar, right-click the entry you want to delete, click Organize and Delete, click Delete, click Yes, and then click Close.



# Inserting Research Material

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WD07S-1.4.2

## Research a Topic

- 1 Click the **Review** tab.
- 2 Click the **Research** button.
- 3 Type the topic you would like to research.
- 4 Click the list arrow, and then select a reference source, or click **All Reference Books**.
- 5 Click the **Start Searching** button (green arrow).

- 6 Select the information in the task pane that you want to copy.

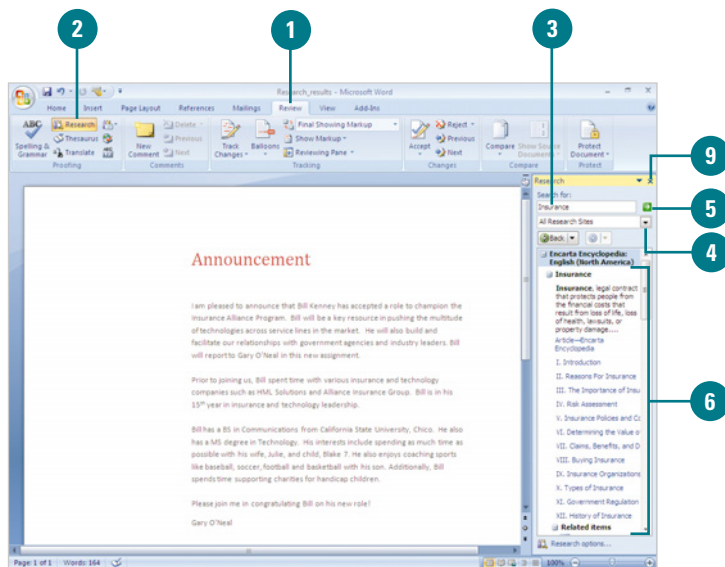
To search for more information, click one of the words in the list or click a link to an online site.

- 7 Select the information you want, and then copy it.

In the Research task pane, you can point to the item you want, click the list arrow, or right-click selected text, and then click **Copy**.

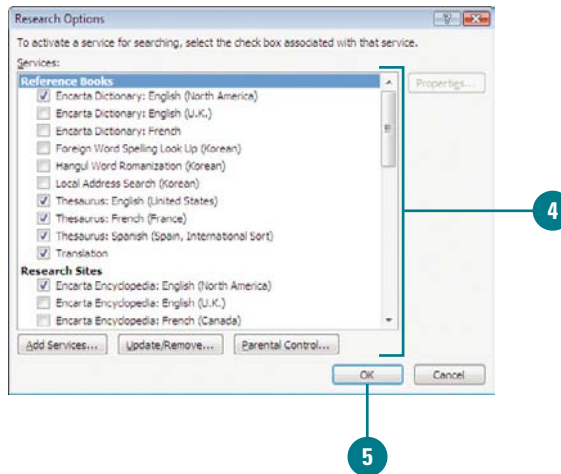
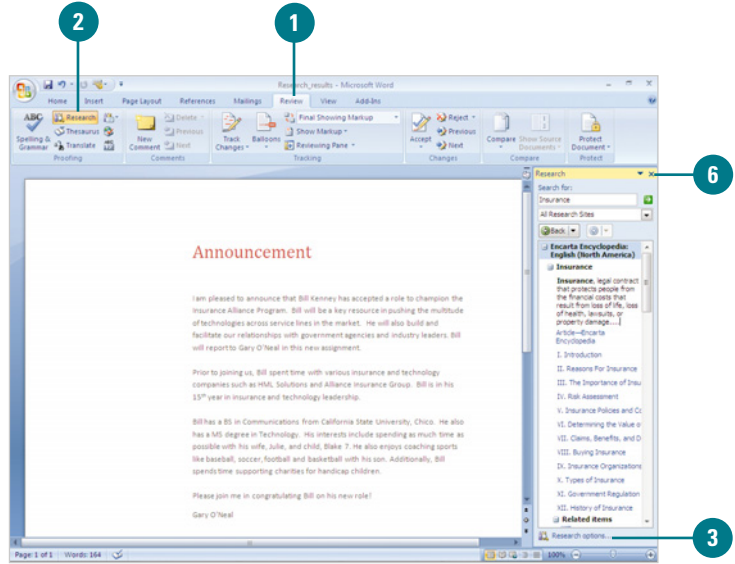
- 8 Paste the information into your document.
- 9 When you're done, click the **Close** button on the task pane.

With the Research task pane, you can access data sources and insert research material right into your text without leaving Word. The Research task pane can help you access electronic dictionaries, thesauruses, research sites, and proprietary company information. You can select one reference source or search in all reference books. This research pane allows you to find information and quickly and easily incorporate it into your work. If you have a hard time finding research information on a specific topic, you can use the Research Options command to enable and update additional reference books and research Web sites from which to search.



## Change Research Options

- 1 Click the **Review** tab.
- 2 Click the **Research** button.
- 3 In the task pane, click **Research Options**.
  - ◆ You can also click Research Options in the Privacy Option pane of the Trust Center.
- 4 Do one or more of the following:
  - ◆ **Services**. To activate or remove research services.
  - ◆ **Add Services**. To add research services.
  - ◆ **Update/Remove**. To update or remove a service provider.
  - ◆ **Parental Control**. To turn on parental controls.
- 5 Click **OK**.
- 6 When you're done, click the **Close** button on the task pane.

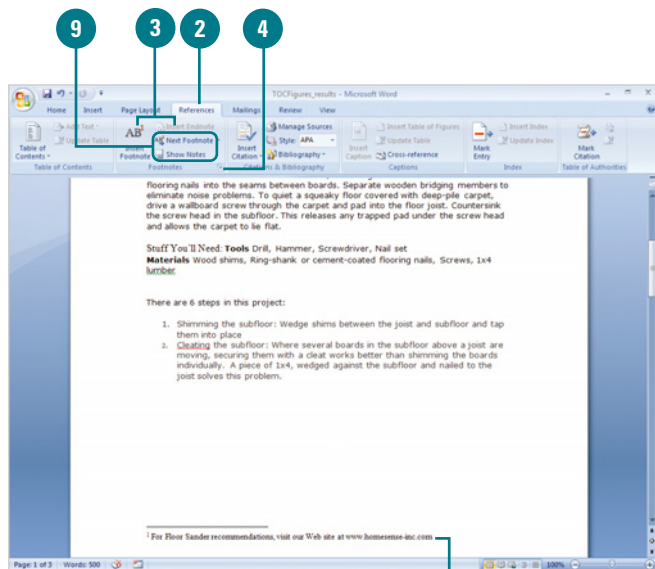


# Creating Footnotes or Endnotes

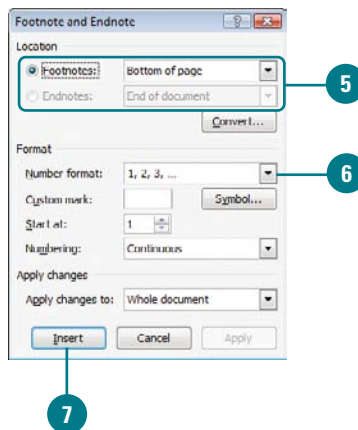
## Create a Footnote or Endnote

- 1 Position the insertion point where you want to insert a footnote.
- 2 Click the **References** tab.
- 3 To quickly create a footnote or endnote, click the **Insert Footnote** or **Insert Endnote** button, and then enter footnote or endnote text.
- 4 To create a customized footnote or endnote, click the **Footnotes** Dialog Box Launcher.
- 5 Click the **Footnotes** or **Endnotes** option, click the list arrow next to the option, and then select the location where you want to place the footnote or endnote.
- 6 Verify that the Number Format option of 1,2,3... is selected.
- 7 Click **Insert** to insert a reference mark in the text. Word moves the insertion point to the bottom of the page corresponding to the number of the reference mark.
- 8 Type the text of your footnote or endnote.
- 9 Click the **Show Notes** button and the **Next Footnote** button to show/hide notes and locate them.
- 10 Click in the document to continue with your work.

Footnotes are used to provide additional information that is inappropriate for the body of the text, and to document your references for information or quotes presented in the body of the document. Footnotes are appropriate for academic, scientific, and occasionally business purposes. Footnotes appear at the bottom of the page on which the information is cited, and Word automatically inserts a reference mark at the insertion point to associate the information presented with the note at the bottom of the page. Creating and manipulating endnotes is identical to performing the same functions for footnotes. Endnotes differ from footnotes in that they appear at the end of the document or section (in the case of longer documents), not the bottom of the page on which the reference mark appears.



Enter footnote here



# Modifying Footnotes or Endnotes

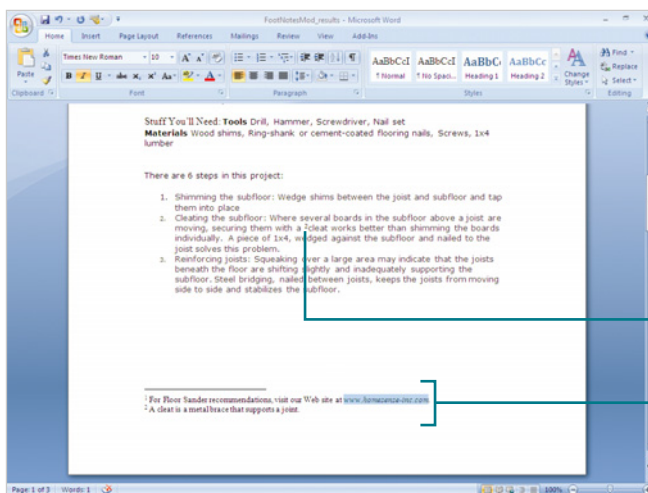
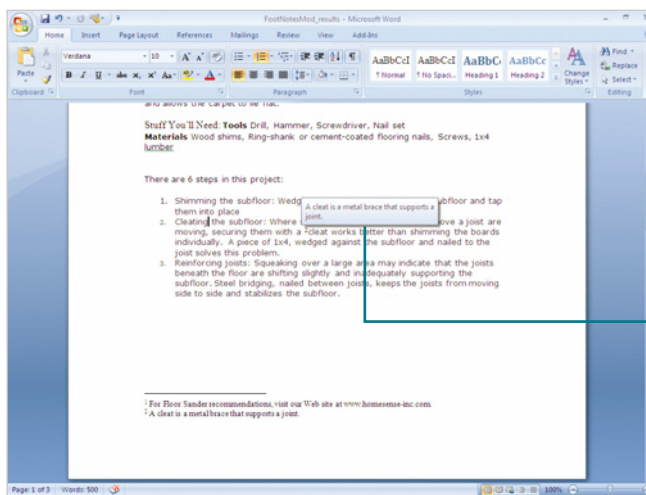
## Edit a Footnote or Endnote

- 1 To quickly view a footnote or endnote, point to the reference mark to display a ScreenTip with the contents of the note.
- 2 To go to a note, double-click the reference mark in the document.
  - ◆ In Draft view, the Notes pane opens.
- 3 Click to place the insertion point in the Notes pane or at the bottom of the page where you want to edit the note text, and then edit the note text as if you were editing text in the document.
- 4 If necessary, click the **Close** button on the Notes pane.
- 5 To move or copy a note, select the reference mark, click the **Cut** or **Copy** button on the Home tab, click to place the insertion point, and then click the **Paste** button.

### Did You Know?

**You can delete a footnote or endnote.** Select the reference mark for the footnote or endnote you want to delete, and then press Delete.

Editing the actual text of a footnote or endnote is just like editing any text, except that you must first access the note. Use the Show Notes button to display all the notes, click to position your insertion point at the bottom of the page or in the Notes pane, and then edit. As you change other text in a document, Word repositions your notes. When your edits affect sentences with notes, or when you move, copy, or delete notes in your document, Word rennumbers the other notes for you. When you move, copy, or delete a note, you work with the note reference mark in the document, not the text in the Notes pane. You can move, copy, or delete a note in the same way you would text in a document.

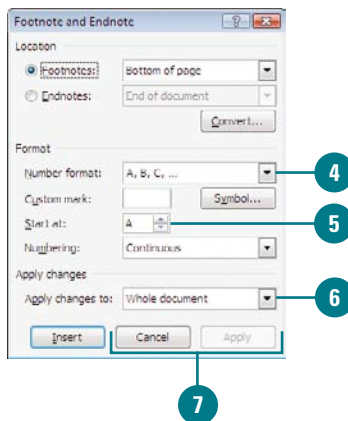
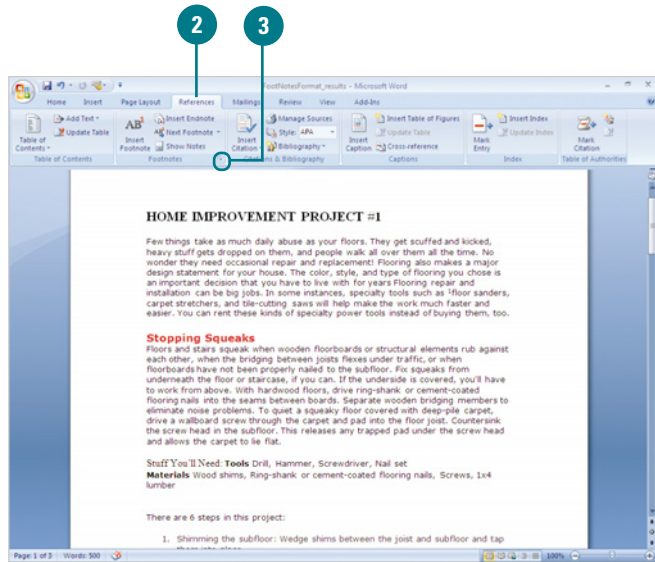


# Formatting Footnotes or Endnotes

## Change a Footnote or Endnote Format

- 1 Click to place the insertion point in the section in which you want to change the footnote or endnote format.
- 2 Click the **References** tab.
- 3 Click the **Footnote & Endnote** Dialog Box Launcher.
- 4 Click the **Number Format** list arrow, and then click the format you want.
- 5 To change the starting point, click the **Start at Up** or **Down** arrows.
- 6 If necessary, click the **Apply changes to** list arrow, and then click **Whole Document**.
- 7 Click **Apply**, and then click **Cancel**.

Footnote or endnote reference marks appear as 1,2,3... by default. Word provides you with various options in order to customize the reference marks the way you wish. If you'd like to change your footnotes or endnotes to be a,b,c or Roman numerals i, ii, iii, you can do that through the Insert menu. You can format the location of the footnote or endnote to be at the bottom of the text, or at the bottom of the page. You can also have Word renumber your footnotes or endnotes after each section of your document, and change the font and other formatting for a reference mark. You format a footnote or endnote reference mark in the same way you format any other text in a document.



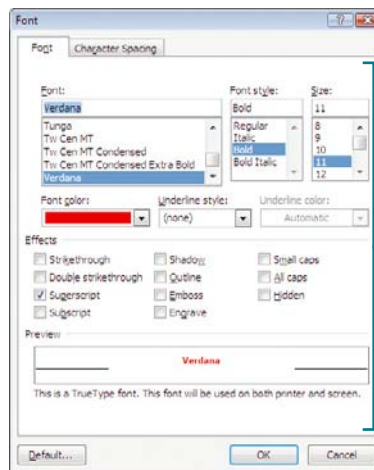
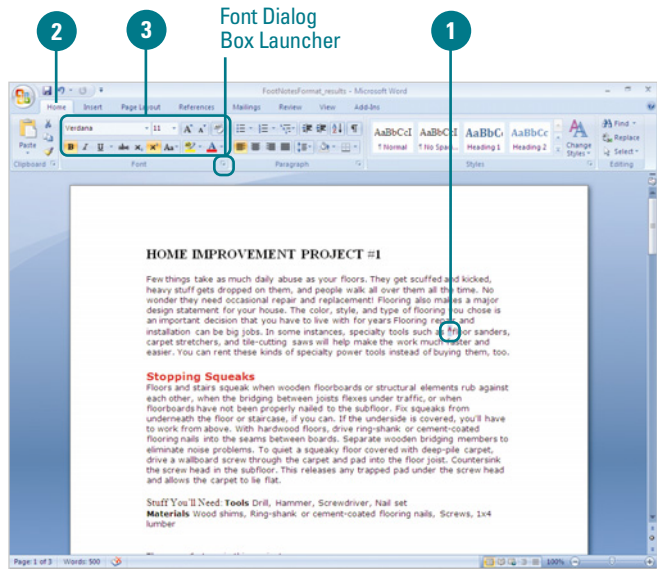
## Format Footnotes or Endnotes in a Document

- 1 In the body text, select the footnote or endnote reference mark.
- 2 Click the **Home** tab.
- 3 Use formatting buttons on the Home tab or click the Font Dialog Box Launcher to format the reference marks the way you want.

### Did You Know?

**You can create a footnote or endnote continuation notice when a note is too long.** Click the Draft View button on the Status bar, click the References tab, and then click the Show Notes button. If necessary, click View footnote area or View endnote area option, and then click OK. In the Notes pane, click the list arrow, click Footnote Continuation Notice or Endnote Continuation Notice, and then type the text you want to use for the notice.

**You can convert one or more notes to footnotes or endnotes.** Click the Draft View button on the Status bar, and then click the Show Notes button. If necessary, click View footnote area or View endnote area option, and then click OK. Select the number of the note or notes you want to convert, right-click it, and then click Convert to Footnote or Convert to Endnote. To convert all notes to footnotes or endnotes, click the Footnote & Endnote Dialog Box Launcher, click Convert, click the option you want, click OK, and then click Close.



# Creating a Bibliography

## Add a Citation and Source to a Document

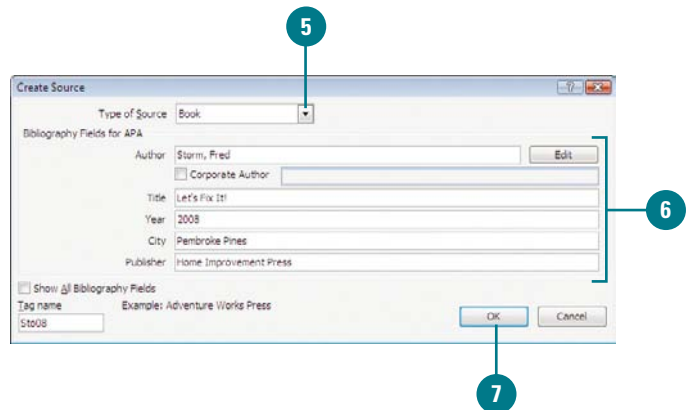
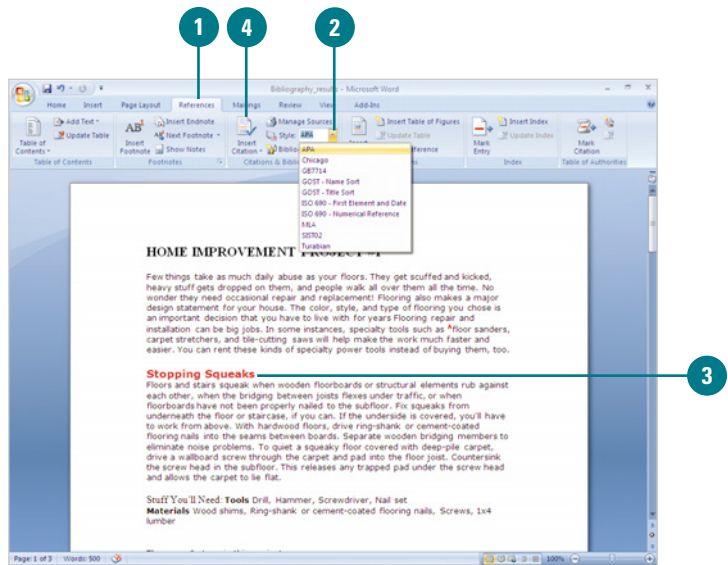
- 1 Click the **References** tab.
- 2 Click the **Style** list arrow, and then click the style you want.

If you're not sure, ask your professor or a business associate, or search the Internet.

- 3 Click to place the insertion point where you want to place the citation.
- 4 Click the **Insert Citation** button, and then click **Add New Source**.
  - ◆ To add new placeholder to fill in the source information later, click **Add new placeholder**, type a placeholder name, and then click **OK**.

- 5 Click the **Type of source** list arrow, and then select a source type.
- 6 Enter the bibliography information for the source.
- 7 Click **OK**.

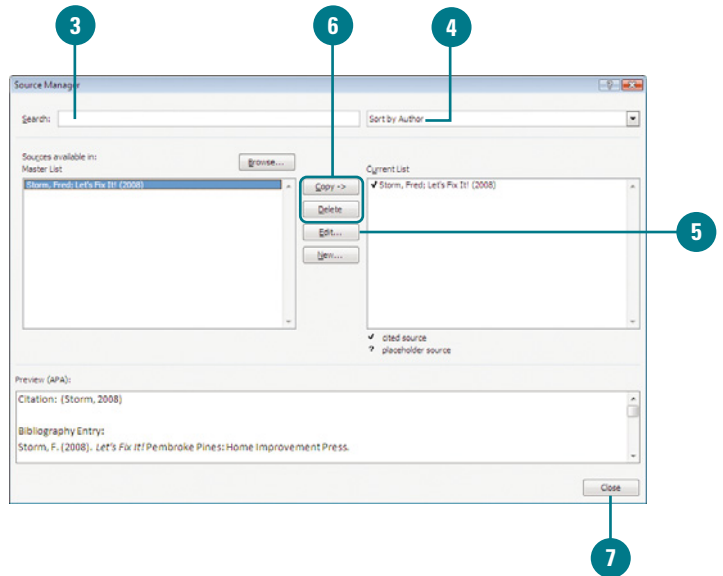
A **bibliography** is a list of sources that you cited during the research of a project. A bibliography typically appears at the end of a document and provides information about the source of your research. When you create a bibliography, you can choose a standard style, which is widely accepted by universities and businesses. So, all you need to do is create a citation and enter the source information. If you're not sure what source you want to use, you can insert a placeholder and fill in the source information later. After you finish adding sources to a document, you can use the Manage Source dialog box to choose which ones you want to use before you create the bibliography.



## Manage Sources and Placeholders

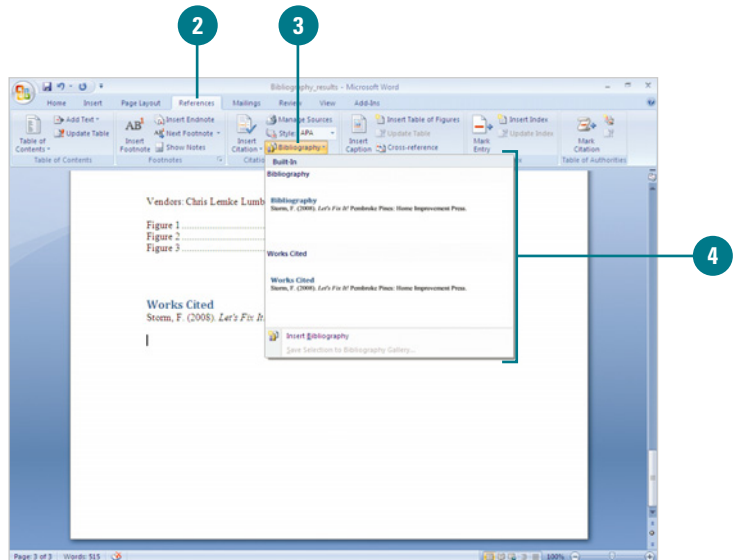
- 1 Click the **References** tab.
- 2 Click the **Manage Sources** button.

All the sources from previous documents appear in the Master List, and currently cited sources in the Current List.
- 3 To search for sources, click in the Search box, type search criteria, and then press Enter.
- 4 To sort source information, click the **Sort** list arrow, and then select a sort type.
- 5 To edit a placeholder, click the placeholder you want to edit in the Current List, and then click **Edit**.
- 6 Use the Copy and Delete buttons to move sources around or delete them.
- 7 Click **Close**.



## Create a Bibliography

- 1 Click to place the insertion point where you want to insert a bibliography.
- 2 Click the **References** tab.
- 3 Click the **Bibliography** button.
- 4 Click the bibliography format style you want to insert.
- 5 To update a bibliography, select the bibliography, click the tab button, and then click **Update Bibliography**.



# Creating a Bookmark

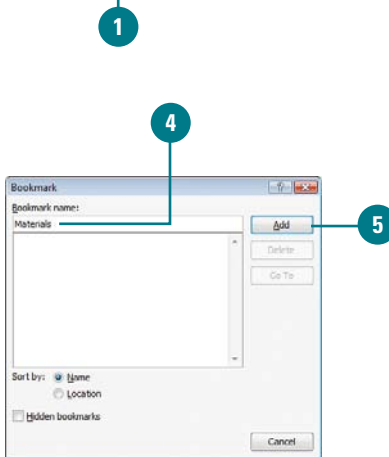
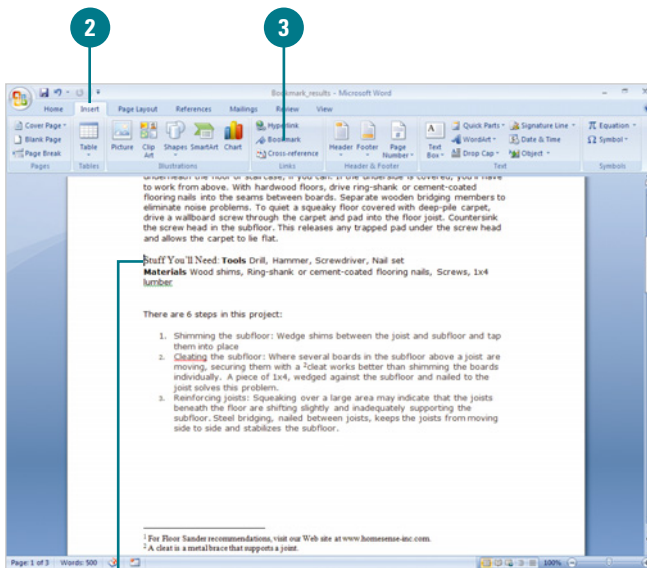
Microsoft  
Certified  
Application  
Specialist

WD07S-1.3.4,  
WD07S-5.1.1

## Create a Bookmark

- 1 Click in your document where you want to insert a Bookmark.
- 2 Click the **Insert** tab.
- 3 Click the **Bookmark** button.
- 4 Type a one word descriptive name for your Bookmark.
- 5 Click **Add**.

Instead of scrolling through a long document to find a specific word, phrase, or section, you can use bookmarks. **Bookmarks** are used to mark text so that you, or your reader, can quickly return to it. Using bookmarks as a destination make it easy to navigate through a long document. You can also navigate through documents with bookmarks by selecting a bookmark as a destination in the Go To dialog box.

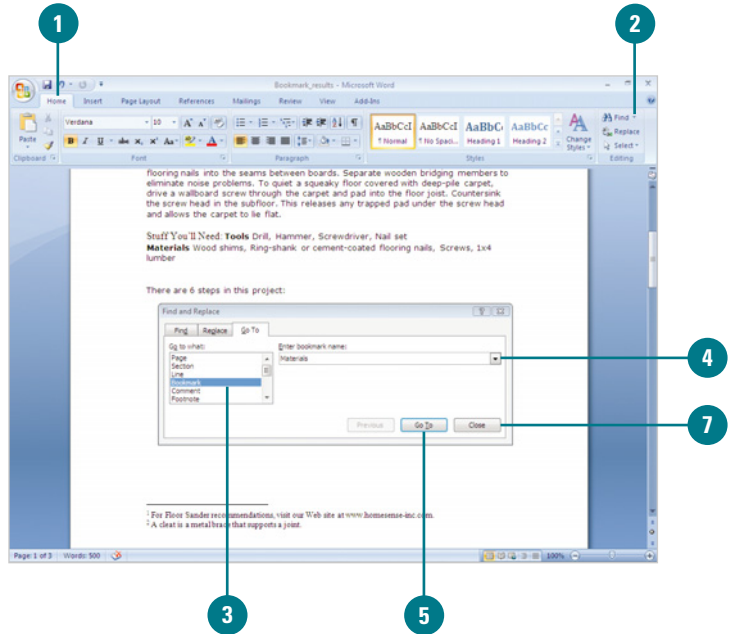


## Go to a Bookmark Location

- 1 Click the **Home** tab.
- 2 Click the **Find** button arrow, and then click **Go To**.
- 3 On the Go To tab, click **Bookmark**.
- 4 Click the **Enter bookmark name** list arrow, and then select the bookmark you want to move to.
- 5 Click **Go To**.
- 6 If you want, choose another bookmark.
- 7 Click **Close**.

### Did You Know?

*You can go to different locations in Word.* Click the Home tab, click the Find button arrow, click Go To, select the Go to what option you want, specify a location, and then click Next or Previous. When you're done, click Close.



# Creating Captions

Microsoft  
Certified  
Application  
Specialist

WD07S-4.4.1,  
WD07S-4.4.2

## Insert a Caption

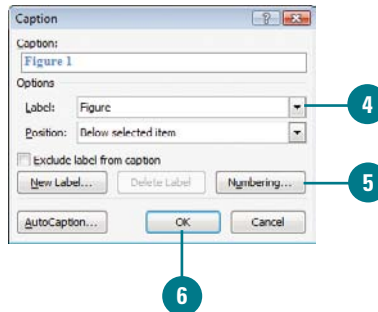
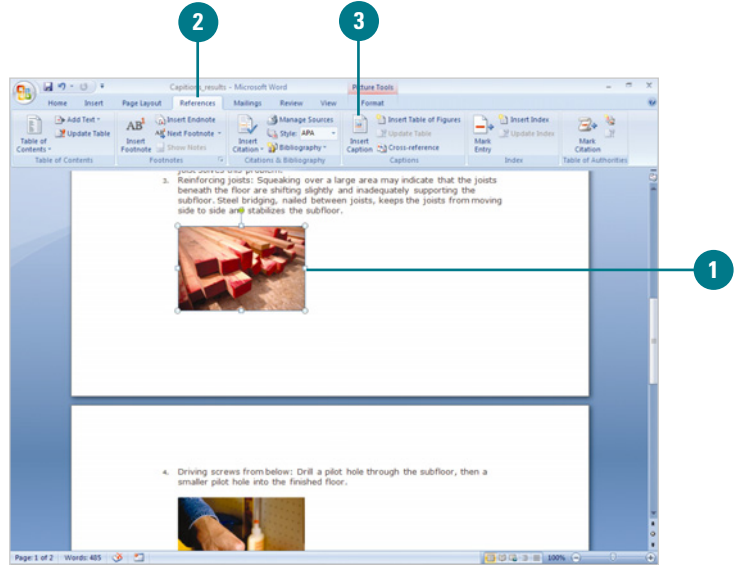
- 1 Select the image that you want to caption.
- 2 Click the **References** tab.
- 3 Click **Insert Caption** button.
- 4 If you want to use a Label other than the default setting of Figure, which is appropriate for most art, click the **Label** list arrow, and then click **Equation** or **Table**.
- 5 If you want to use a numbering sequence other than the default setting of 1,2,3..., click **Numbering**, make your selections, and then click **OK**.
- 6 Click **OK**.

### Did You Know?

**You can have Word automatically add a caption field.** Whenever you insert a particular type of file, such as a bitmapped image, click AutoCaption. In the Add Caption When Inserting list, click the check boxes to select the instances where you want the feature to apply, select the Label, Positioning and Numbering options you want, and then click OK.

**You can add custom labels for captions.** Click New Label, type the name of the New Label, and then click OK.

Captions are helpful not only to associate images with the text that refers to them, but also to provide the reader with amplifying information about the figure, table, chart, or other illustration displayed. You can use preset captions provided, such as Figure, or you can create your own custom caption for your document.



# Creating a Table of Figures

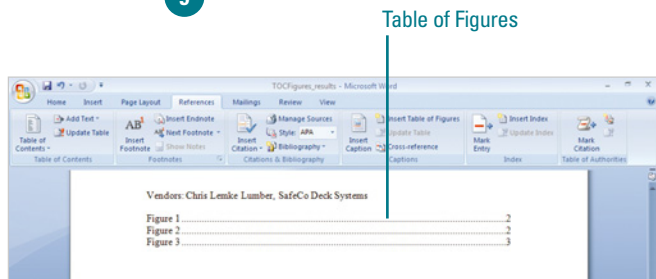
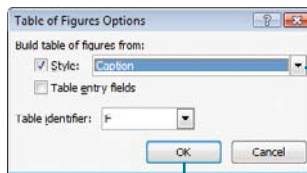
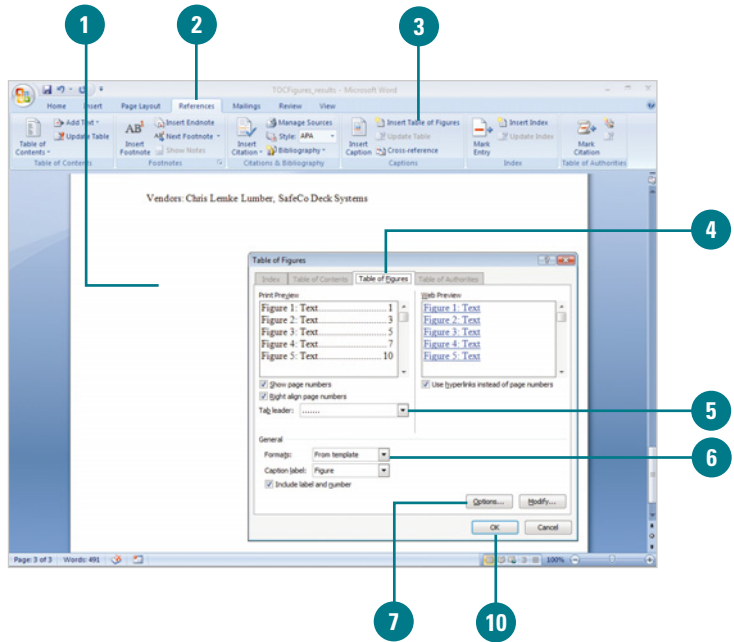
Microsoft  
Certified  
Application  
Specialist

WD07S-4.4.5

## Create a Table of Figures

- 1 Position the insertion point where you want the Table of Figures to appear.
- 2 Click the **References** tab.
- 3 Click **Insert Table of Figures** button.
- 4 Click the **Table of Figures** tab.
- 5 Click the **Tab leader** list arrow, and then select the tab leader you want to use.
- 6 Click the **Formats** list arrow, and then select the format you want to use for the Table of Figures.
- 7 If you want to create a Table of Figures from something other than the default Figure style, or the Table style, click **Options**.
- 8 Click the **Style** list arrow, select the text formatting that you want Word to search for when building the Table of Figures, and then click **Close**. All figure callouts of the selected style are tagged for inclusion in the Table of Figures.
- 9 Click **OK**.
- 10 Click **OK**.

If you are creating a document in which there are many illustrations (art, photographs, charts, diagrams etc.), it is often helpful to the reader of your document to provide a Table of Figures. A **Table of Figures** is like a Table of Contents except that it deals only with the graphic content of a document, not the written content. To create the Table of Figures, Word looks for text with the Style code that you specify (Figure, Table, etc). You can also add a **tab leader** to make the table easier to read.

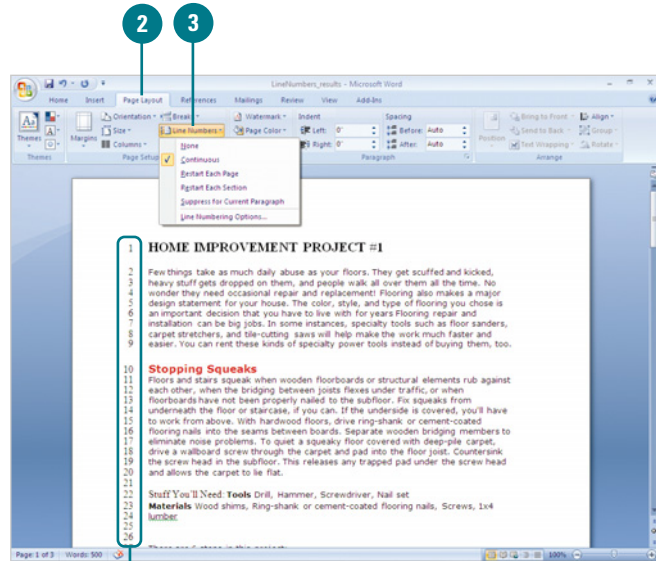


# Numbering Lines

## Number Each Line in a Document Quickly

- 1 If you want to show or hide line numbers to only selected text, select the text you want.
- 2 Click the **Page Layout** tab.
- 3 Click the **Line Numbers** button, and then click the option you want:
  - ◆ **None.** Remove line numbers from the document.
  - ◆ **Continuous.** Add line numbers to the document starting from line 1.
  - ◆ **Restart Each Page.** Restart line numbers on each page.
  - ◆ **Restart Each Section.** Restart line numbers at each section.
  - ◆ **Suppress for Current Paragraph.** Remove line numbers from the selected text.

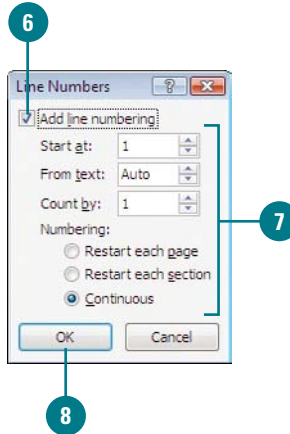
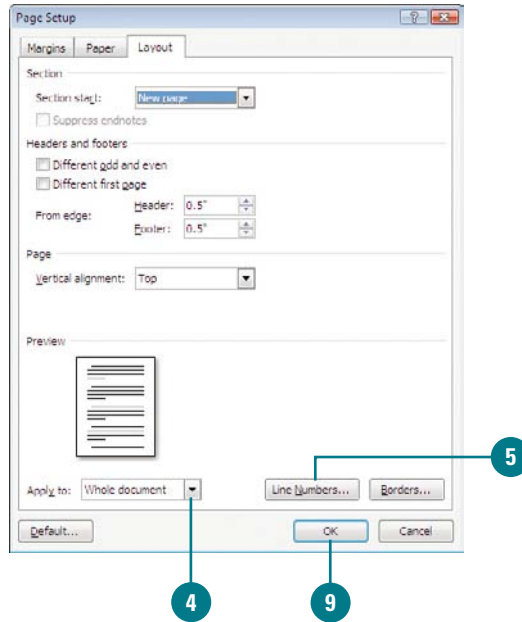
Many legal documents use the formatting convention of numbering every line of text to make it easier for multiple parties to refer to very specific text in a longer document in the context of their discussions. Other types of documents that sometimes use this convention are movie and television scripts. You can have Word automatically number each line of text within a document.



Line numbers

## Customize Line Numbering Options

- 1 If you want to display line numbers to only selected text, select the text you want.
- 2 Click the **Page Layout** tab.
- 3 Click the **Line Numbers** button, and then click **Line Numbering Options**.
- 4 If you're adding line numbers to part of a document, click the **Apply to list arrow**, and then click **Selected text**.
- 5 Click **Line Numbers**.
- 6 Click the **Add line numbering** check box.
- 7 Select the options you want: Start at, From text, Count by, and Numbering.
- 8 Click **OK**.
- 9 Click **OK**.



# Creating an Equation

## Insert a Common Equation from the Equations Gallery

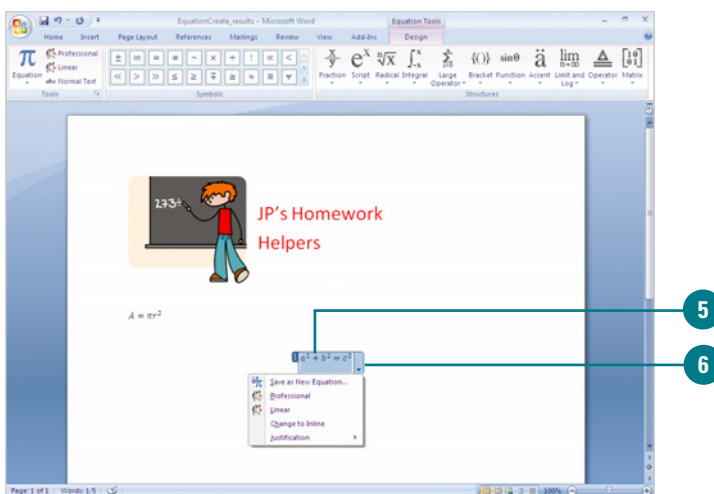
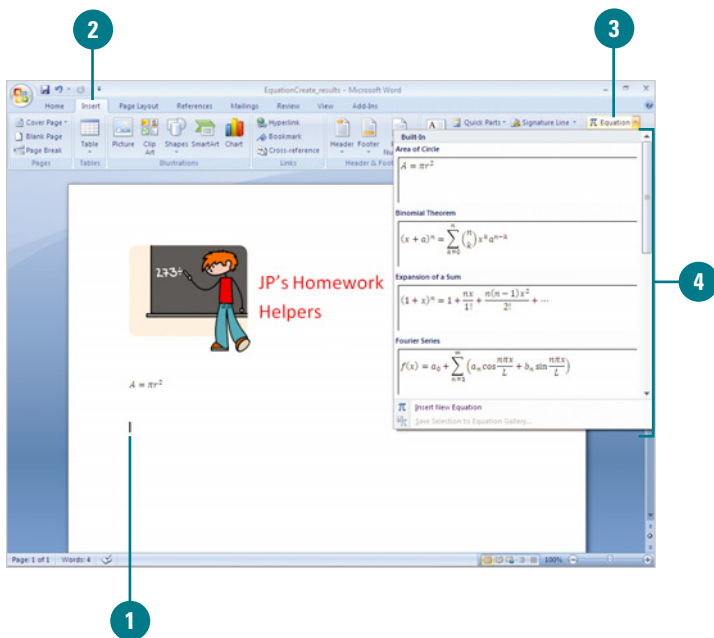
- 1 Click where you want to insert an equation.
- 2 Click the **Insert** tab.
- 3 Click the **Equation** button arrow.
- 4 Click a common equation from the Equations gallery.

The equation appears in the document as a building block.

- 5 Click to place the insertion point in the equation and then edit it like you would text.
- 6 To change the equation display, click the **Equations Options** list arrow, and then click the option you want.

- ◆ **Save as New Equation.** Saves the equation as a new building block in the Equations gallery.
- ◆ **Professional.** Displays equation in 2D form.
- ◆ **Linear.** Displays equation in 1D form.
- ◆ **Change to Inline or Display.** Changes the equation position to inline with text or display in the middle of the line.
- ◆ **Justification.** Changes alignment: Left, Right, Centered, or Centered as a Group.

If you are creating a scientific or academic paper that involves complex equations, you may need to display them in the text without actually using them in conjunction with a table. The standard keyboard does not have all of the mathematical symbols you might need to create the equation, so you can use the Equations gallery to quickly insert a common equation or the Design tab under Equation Tools to create a custom equation. The Equations gallery is part of Word's building block approach to creating customized documents (**New!**).



## Create an Equation

- 1 Click where you want to insert an equation.
- 2 Click the **Insert** tab.
- 3 Click the **Equation** button arrow, and then click **Insert New Equation**.

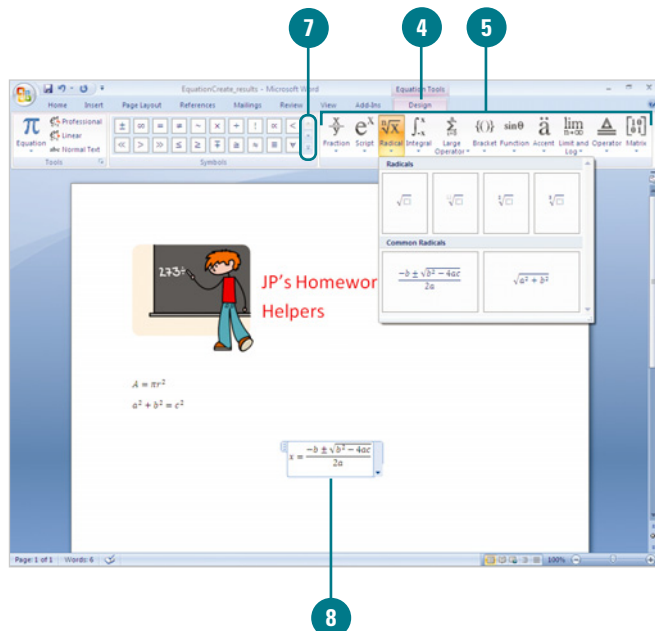
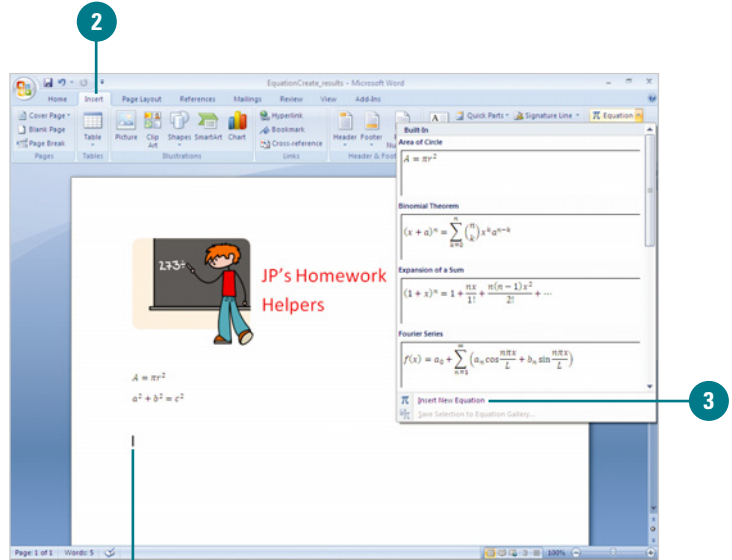
A blank equation building block appears.

- 4 Click the **Design** tab under Equation Tools.
- 5 Type any part of the equation, or click any of the buttons in the Structures group you want, and then select the equation segment you want.
- 6 Select the placeholder you want to insert more of the equation.
- 7 Click the scroll up or down arrow, or click the **More** list arrow in the Symbols group, and then select the symbol you want to insert.
- 8 Continue to insert structures and symbols to complete your equation.

### Did You Know?

**You can display an equation as regular text.** Select an equation, click the Design tab under Equation Tools, click the Linear button, and then click the Normal Text button.

**You can change default equation options.** Select an equation, click the Design tab under Equation Tools, click the Tools Dialog Box Launcher, specify the options you want, and then click OK.



# Inserting Symbols

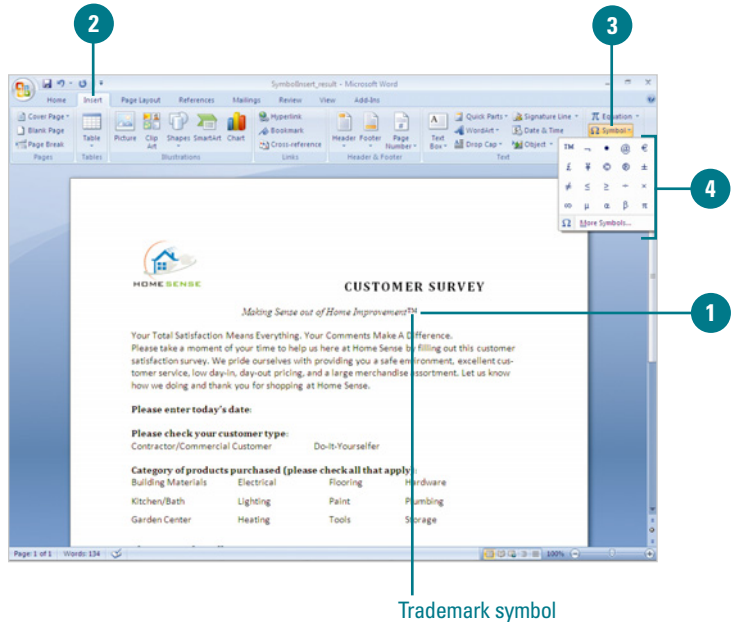
## Insert Recently Used Symbols and Special Characters Quickly

- 1 Click the document where you want to insert a symbol or character.
- 2 Click the **Insert** tab.
- 3 Click the **Symbol** button.
- 4 Click one of the recently used symbols or special characters from the list to insert it into the document.

### Did You Know?

**You can insert a symbol using a character code.** When the From box displays ASCII (decimal), you can use the number shown in the Character Code box to insert a character or symbol. Place your insertion point where you want the character on the slide, make sure Num Lock is on, hold down the Alt key, and then use the numeric keypad to type 0 (zero) followed by the character code. Then release the Alt key. The code applies to the current code page only, so some characters may not be available this way.

Word comes with a host of symbols for every need. Insert just the right one to keep from compromising a document's professional appearance with a missing accent or mathematical symbol (å). In the Symbol dialog box, you use the Recently used symbols list to quickly insert a symbol that you want to insert again. If you don't see the symbol you want, use the Font list to look at the available symbols for other fonts installed on your computer.



## Insert Symbols and Special Characters

- 1 Click the document where you want to insert a symbol or character.
- 2 Click the **Insert** tab.
- 3 Click the **Symbol** button, and then click **More Symbols**.

- 4 To see other symbols, click the **Font** list arrow, and then click a new font.

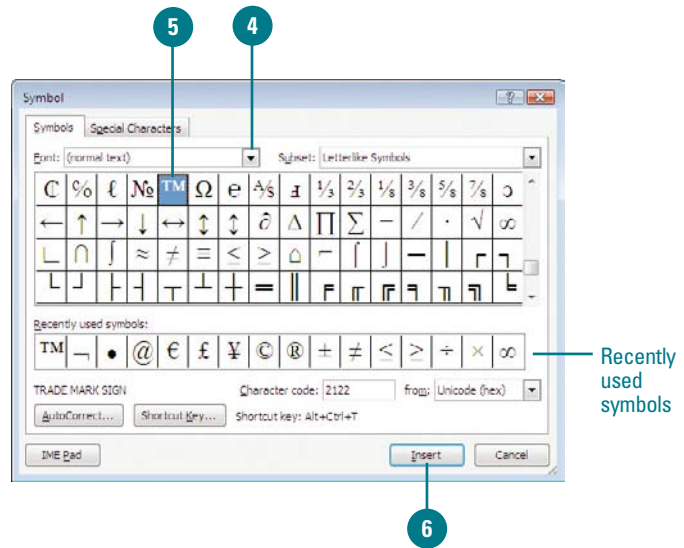
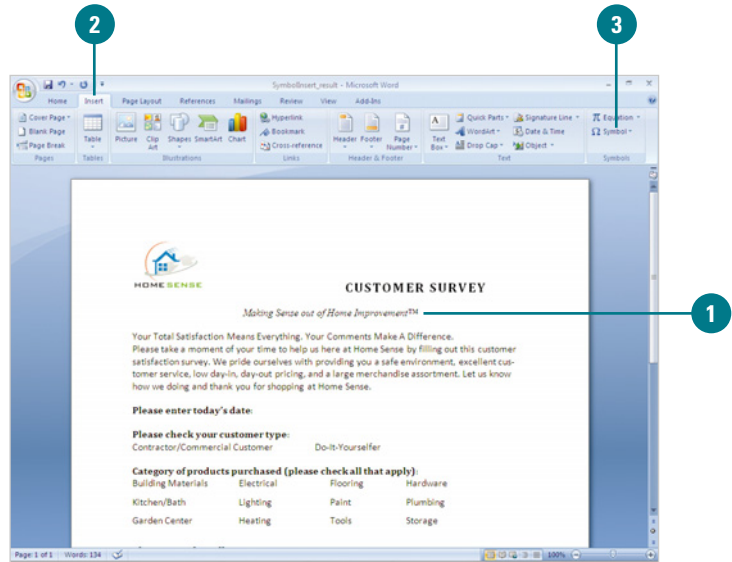
- 5 Click a symbol or character.

You can use the Recently used symbols list to use a symbol you've already used.

- 6 Click **Insert**.

### Did You Know?

*You can assign a shortcut key to insert a symbol within the document.* Click the Insert menu, click Symbol, click a symbol, click Shortcut Key, enter the shortcut key information requested, and then click Close.



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# Creating Mail Merge Documents

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# 10

## Introduction

Whether you are looking to personalize your annual Christmas letter to friends and family, or prepare a direct-mail marketing piece to 10,000 customers of your business, Word's Mail Merge Wizard is up to the task. To perform a mail merge, you need a **form letter** that contains the text you want to send out, plus **merge fields** for the information that you want to use to personalize each letter, such as the recipient's address, first name in the greeting line, and so forth. These fields can be added manually, or as part of the Mail Merge Wizard process.

You must have a **data document** that contains all of this information in either comma or tab delimited format. Most databases, such as Access or Outlook (contacts), can automatically export into this format. Alternately, you can manually create a data document if you do not have an existing database of contact information that you can use for the merge. Equipped with these two sources, the Mail Merge Wizard can quickly and easily create thousands of personalized letters, address labels, and envelopes, in a fraction of the time it would otherwise take you to do these tasks.

If you prefer a more manual approach to creating a mail merge document, you can perform the process using commands on the Mailings tab. The mail merge process follows the same general steps. First, set up the main document. Second, connect the document to a data source. Third, refine the list of recipients or items. Fourth, add mail merge fields, and fifth, preview and complete the merge. If you need to stop working during the mail merge process, you can save the document and resume it again later. Word saves all information regarding the mail merge and returns you to the place in the task pane where you left off.

## What You'll Do

**Start the Mail Merge**

**Import Data from a Database**

**Import Data from Outlook**

**Create a Data Document**

**Edit the Data Source**

**Sort and Filter Data**

**Create a Form Letter**

**Preview the Mail Merge**

**Complete the Mail Merge**

**Merge to E-Mail**

**Create Merged Mailing Labels**

**Create Merged Envelopes**

**Address Envelopes and Labels**

# Starting the Mail Merge

## Start the Mail Merge Wizard

- 1 Click the **Mailings** tab.
- 2 Click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.

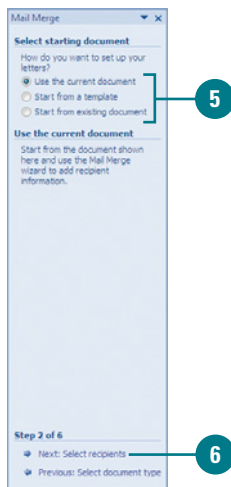
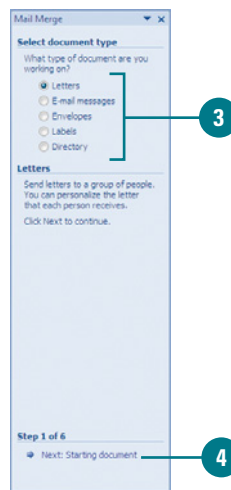
The Mail Merge task pane opens, displaying Step 1 of 6.

- 3 Select the type of document you are working on (in this case the Letters option).
- 4 Click **Next: Starting document** on the task pane to display Step 2 of 6.
- 5 Click a starting document option (such as Use the current document).
- 6 Click **Next: Select recipients** on the task pane to display Step 3 of 6.

### Did You Know?

**You can set up the main document manually.** Create a new or existing document, click the Mailings tab, click the Start Mail Merge button, select a document type (Letters, E-Mail Messages, etc.), and then select any options, if prompted.

Did you ever send the same letter to several people and spend a lot of time changing personal information, such as names and addresses? If so, form letters will save you time. **Mail merge** is the process of combining names and addresses stored in a data file with a main document (usually a form letter) to produce customized documents. There are four main steps to merging. First, select the document you want to use. Second, create a data file with the variable information. Third, create the main document with the boilerplate (unchanging information) and merge fields. Finally, merge the main document with the data source to create a new document with all the merged information. When you start the mail merge, you need to open the letter that you want to mail merge or type one. Don't worry about addressing the letter or adding a greeting line, you can accomplish that with the Mail Merge Wizard.



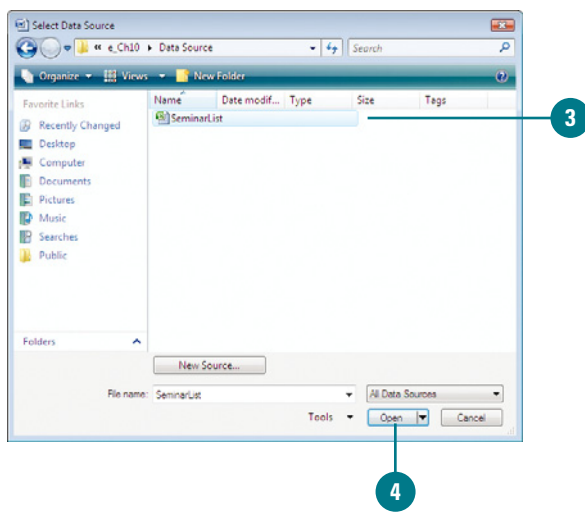
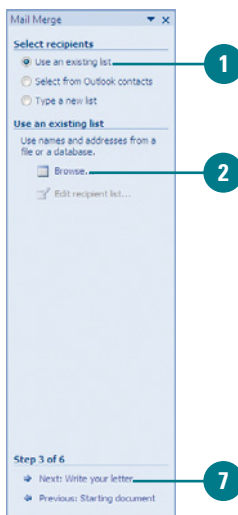
# Importing Data from a Database

## Import Data from an Existing Database

- 1 On Step 3 of 6 in the Mail Merge task pane, click the **Use an existing list** option.
- 2 Click **Browse** on the task pane.
- 3 Locate and select the database file from which you want to import the recipient data.
- 4 Click **Open**.
- 5 If necessary, select a data source, such as a table in an Excel worksheet or Access database, and then click **OK**.
- 6 Edit the recipient data (if necessary), and then click **OK**.
- 7 Click **Next: write your letter** on the task pane to display Step 4 of 6.

The Mail Merge Recipient dialog box opens, displaying the data source for the merge.

Now it is time to specify the recipients for your mail merge. To do so, you must identify a **data document** as the source of the recipient information you will use to personalize the mailing. If you have an existing database of information to work with, this is the easiest method. The mail merge works with most standard database and spreadsheet programs including Microsoft Access, Microsoft FoxPro, and Microsoft Excel. Before you can import data into the Mail Merge Wizard from an external database, you must first export it from the database you are using. Follow the instructions for that database to export a file in either comma or tab delimited format, and remember which format you chose. Export the file to the My Data Sources folder.



# Importing Data from Outlook

## Import Data from Outlook

- 1 On Step 3 of 6 in the Mail Merge task pane, click **Select from Outlook contacts**.
- 2 Click **Choose Contacts Folder**.
- 3 If an Outlook profile dialog box opens, select a profile, and then click **OK**.

The Select Contact List Folder dialog box opens.

- 4 Select the contacts list you want to use.
- 5 Click **OK**.

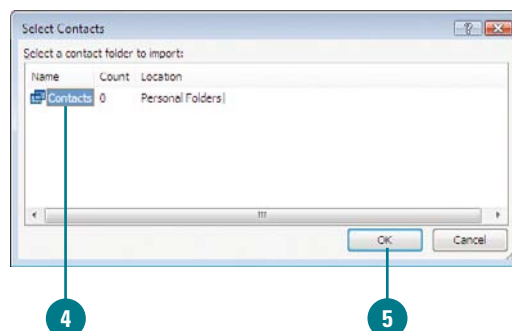
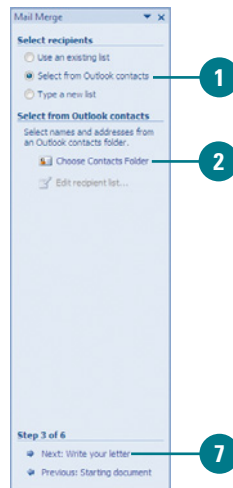
The Mail Merge Recipients dialog box opens, displaying the data source for the merge.

- 6 Edit the recipient data (if necessary), and then click **OK**.
- 7 Click **Next: Write your letter** on the task pane to display Step 4 of 6.

### Did You Know?

*You can connect the document to a data source manually.* In the document, click the Mailings tab, click the Select Recipients button, and then select the data source you want, and any related options, if prompted.

If you are already using Outlook to manage your contact database, you can import your Outlook contact records into the Mail Merge Wizard quickly and easily. For example, a contact record for a person or company might contain an address, telephone, e-mail address, and so forth. An item record might contain the part number, description, quantity on hand, and so on. The information in each record is organized by fields. The fields of the database correspond to the merge fields you specify in the Form Letter. Additional fields other than the ones to be used by the merge can exist, and will be ignored by the Mail Merge Wizard. For example, a direct mail piece would use the address field in a record as a merge field and ignore the e-mail address field for that record, whereas an e-mail merge would do exactly the opposite.



# Creating a Data Document



When you are only doing a limited number of pieces in a mail merge, or you cannot input the records into one of the previously mentioned programs for permanent use and then export them to the Mail Merge Wizard to perform the task at hand, you can use the Wizard to create your recipient list. You can also use Word to manually type a data document. The first line of the document should contain the merge field names separated by commas or tabs (choose one format and be consistent throughout the document). For example, FirstName, LastName, Address, City, State, Zip. Note that field names cannot contain spaces. At the end of the field name line, press Enter. Input all of the data for a given record separated by commas on the lines that follow, press Enter after each record entry. When all entries are entered, save the document as a text file and import it as an existing file in Step 3 of 6 in the Mail Merge Wizard.

## Create a Data Document

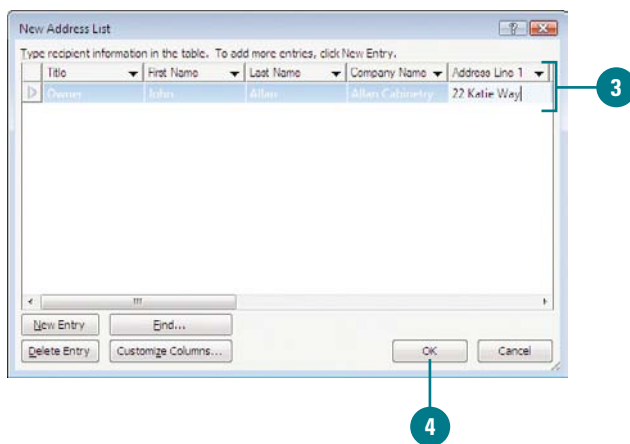
- 1 On Step 3 of 6 in the Mail Merge task pane, click the **Type a new list** option.
- 2 Click **Create**.
- 3 Input your information for the first record, and then click **New Entry**.
- 4 Continue to input additional records; click **New Entry** after each one until all records have been entered, and then click **OK**.

The Save Address List dialog box opens, displaying the My Data Sources folder.

- 5 Enter a name, and then click **Save** to save your work.

The Mail Merge Recipients dialog box opens, displaying the data source for the merge.

- 6 Edit the recipient data (if necessary), and then click **OK**.
- 7 Click **Next: Write your letter** on the task pane to display Step 4 of 6.



# Editing the Data Source

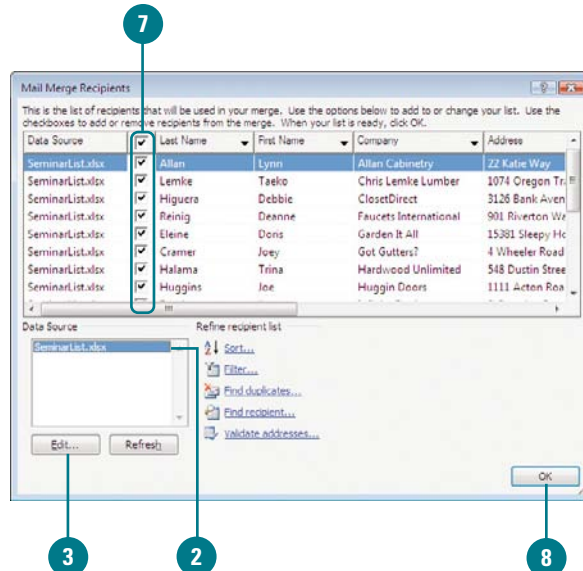
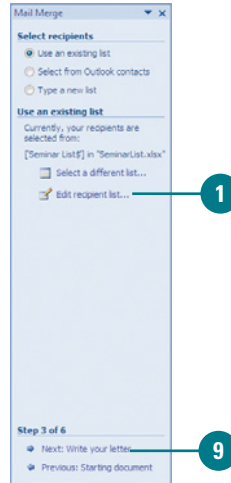
## Edit a Data Document

- 1 On Step 3 of 6 in the Mail Merge task pane, click **Edit recipient list**.
  - 2 Select the data source.
  - 3 Click **Edit**, and then make the changes you want to the fields.
  - 4 To add records to the merge, select any existing record, and then click **New Entry**.
  - 5 To remove the selected record from the data document permanently, and then click **Delete Entry**.
  - 6 Click **OK**.
  - 7 If you want to retain the record in the data document, but exclude it from the merge, clear the check mark next to the record.
- All records begin selected by default and must be manually deselected from the merge.
- 8 When you're done, click **OK**.
  - 9 Click **Next: Write your letter** on the task pane to display Step 4 of 6.

### Did You Know?

**You can refine the data source manually.** In the document, click the Mailings tab, click the Edit Recipient List button, and then make the changes you want, and any related options, if prompted.

Regardless of the original source of your data, an external database, manually prepared list, Outlook records, or an Address List that you created within the Mail Merge Wizard, periodically you will want to make some changes to the data before completing the merge. The time to do so is in Step 3 of 6 of the Mail Merge Wizard.



# Sorting and Filtering Data

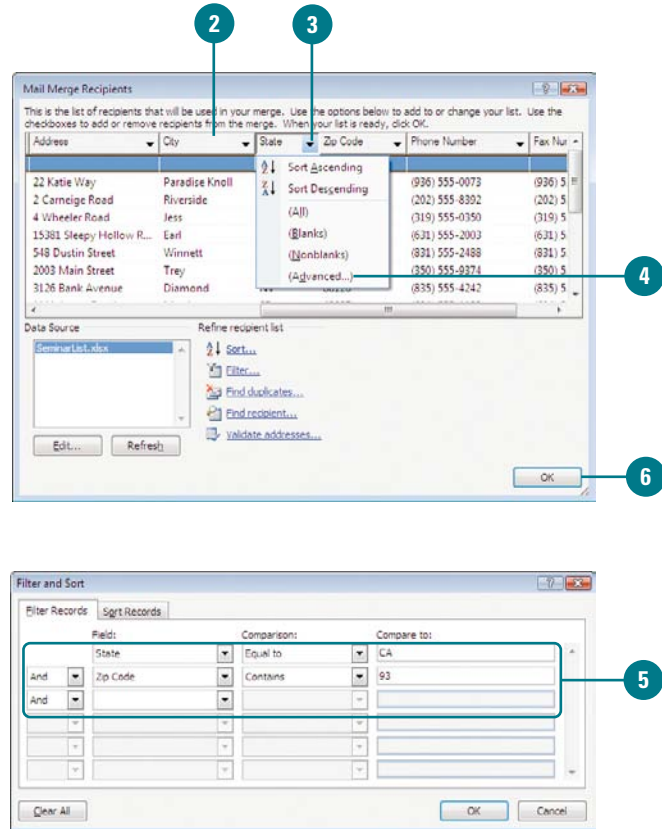
## Sort and Filter Records

- 1 On Step 3 of 6 in the Mail Merge task pane, click **Edit recipient list**.
- 2 To sort the data in a column, click the field column heading (not the list arrow inside of it).
- 3 To filter out data in a field column by a specific criterion or value, click the list arrow in the column heading, and then select a filter option or value.
- 4 To perform advance sorts, where you compare the values of certain fields, click the list arrow for any field, and then click **Advanced**.
- 5 If you chose an advanced sort, select or enter filter and sort criteria in the Field, Comparison, and Compare to box, and then click **OK**.
- 6 When you're done, click **OK**.
- 7 Click **Next: write your letter** on the task pane to display Step 4 of 6.

### Did You Know?

**You can display all the data in a column.** In the Mail Merge Recipient dialog box, click the column heading list arrow used for a filter, and then click All.

When you are working with large numbers of records, it is often helpful to organize those records in a particular order. For example, if you are doing a bulk mailing via the USPS, they require that the pieces of the mailing be sorted in zip code order for you to receive the savings associated with the bulk mail rate. Word can easily accomplish this task for you so the records are merged and printed in zip code order. You can sort and filter records by any of the merge fields in the record.



# Creating a Form Letter

Microsoft  
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WD07S-4.5.1,  
WD07S-4.5.2

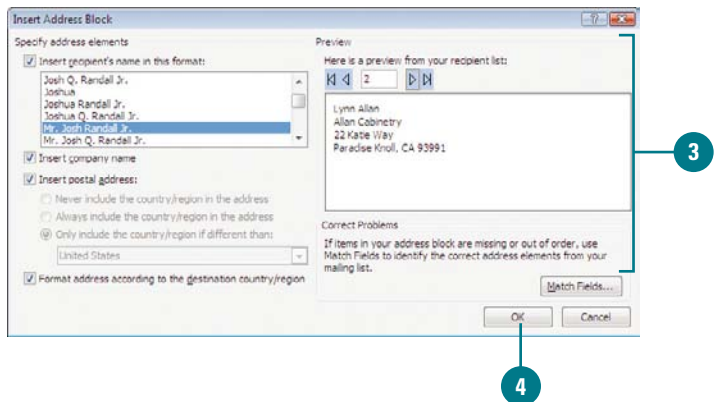
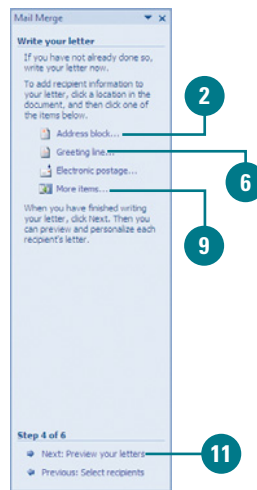
## Create a Form Letter

- 1 On Step 4 of 6 in the Mail Merge task pane, position the insertion point in the letter where you want the address block to appear.
- 2 Click **Address Block** on the task pane.
- 3 Select the Address Block options you want.
- 4 Click **OK** to insert the block in the document.
- 5 Position the insertion point where you want the greeting to appear.
- 6 Click **Greeting Line**.

### Did You Know?

**Word supports international languages in Mail Merge.** Mail Merge chooses the correct greeting format based on the gender of the recipient if the language requires it. Mail Merge can also format addresses based on the geographical region of the recipient.

The only difference between a normal letter and a **form letter** is the presence of merge fields in the letter. Merge fields can exist anywhere in the document, and correspond to any field in the data document. For example, you can insert the FirstName field periodically in a document to reaffirm to the reader that you are speaking directly to them, and minimize the negative reactions that many people feel when they receive a form letter. The most commonly used fields in a form letter are the address block and the greeting line. Each merge field corresponds to a piece of information in the data source and appears in the main document with the greater than and less than characters around it. For example, the <<Address Block>> merge field corresponds to name and address information in the data source. Word incorporates insert commands for each of these in the Mail Merge Wizard.



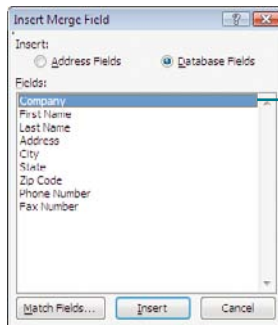
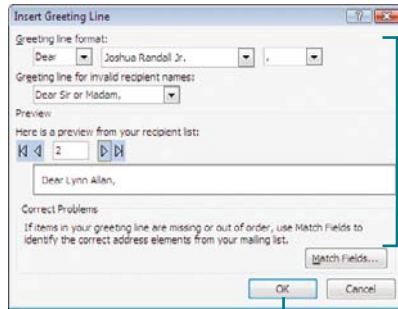
- 7 Select the format you want for the greeting line.
- 8 Click **OK** to apply the style to the merge field.
- 9 If you want to add other merge fields in the body of the form letter, position the insertion point where you want the information, and then click **More Items** on the task pane.
- 10 Select the merge field you want to place, click **Insert**, and then click **Close**.
- 11 When you're done, click **Next: Preview your letters** on the task pane to display Step 5 of 6.

### Did You Know?

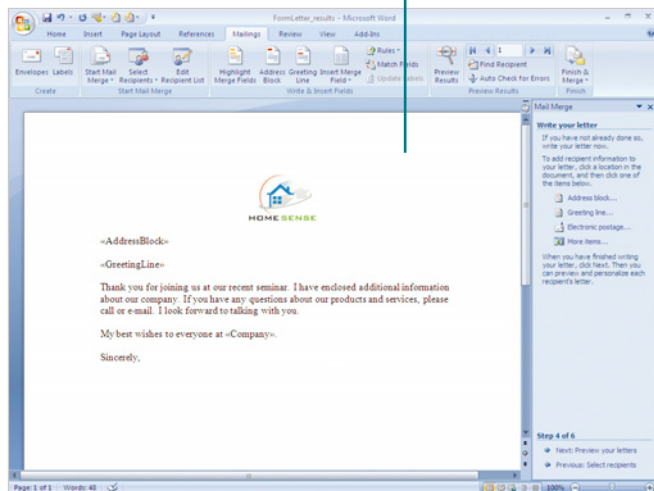
*You can edit the style of a field.* Right click on the field to bring up a menu of options, and then click Edit.

*You can have common words used as field names.* Information in a data file is stored in merge fields, labeled with one-word names, such as FirstName, LastName, City, and so on. You can insert merge field names in the main document as blanks or placeholders, for variable information. When you merge the data file and main document, Word fills in the blanks with the correct information.

*You should beware of those extra spaces.* Don't press the Spacebar after entering data in a field. Extra spaces will appear in the document between the data and the next word or punctuation, leaving ugly gaps or floating punctuation. Add spaces and punctuation to your main document instead.



Letter with merged fields



# Previewing the Mail Merge

## Preview the Mail Merge

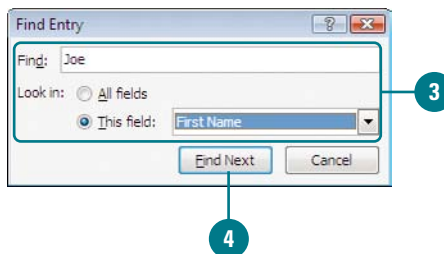
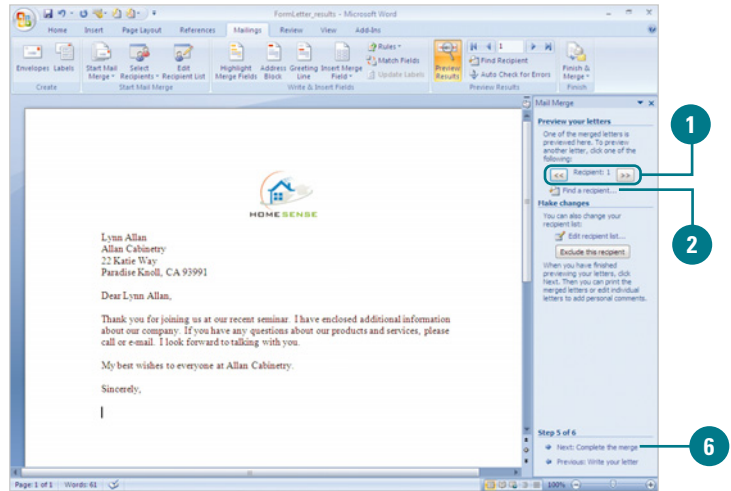
- 1 On Step 5 of 6 in the Mail Merge task pane, click the double arrows on the task pane to scroll through the merge letters one at a time.
- 2 To find a given recipient or group of recipients quickly, click **Find a recipient** on the task pane.
- 3 If you chose Find, enter search criterion, click the **All fields** option, or **This field** option, and then select a field.
- 4 Click **Find Next** to proceed to the next matching record.
- 5 When you're done, click **Close**.
- 6 Click **Next: Complete the merge** on the task pane to display Step 6 of 6.

### Did You Know?

**You can exclude a recipient from the merge.** Click the Exclude this recipient button on the task pane on Step 5 of 6.

**You can preview the mail merge results manually.** In the document, click the Mailings tab, click the Preview Results button, view the results, and then make the changes you want.

Although Word has automated much of the mail merge process for you, it is always a good idea to review the merged letters before printing them. You might find changes to the body text or even the merge fields that you want to make before the merge is final. The preview process occurs in Step 5 of 6 in the Mail Merge task pane.



# Completing the Mail Merge

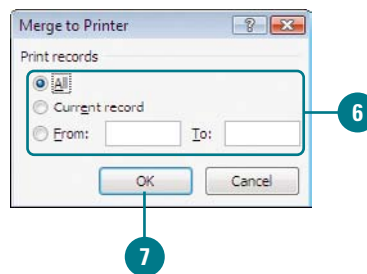
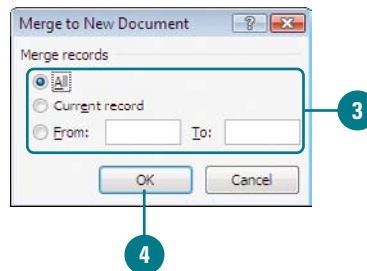
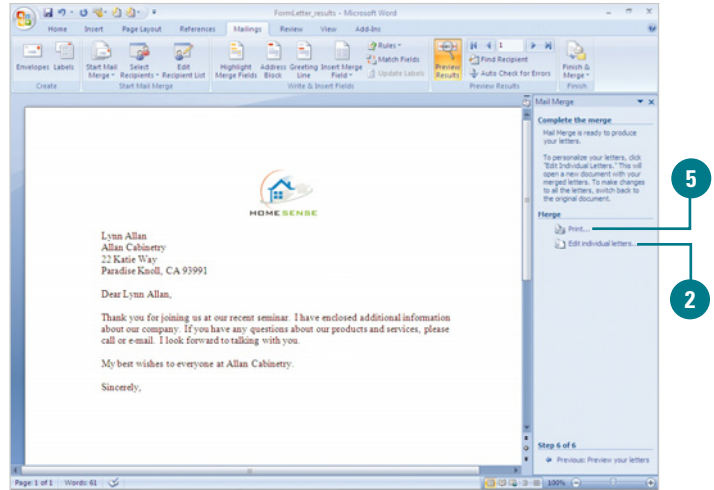
## Personalize and Print the Mail Merge

- 1 Proceed to Step 6 of 6 in the Mail Merge task pane.
- 2 If you want to make additional changes to the letters, click **Edit Individual Letters**.
- 3 Specify the settings you want to use for the merged records and the selected range of the records are saved to a separate file for editing.
- 4 Click **OK**.
- 5 When you're ready to print, click **Print** on the task pane.
- 6 Click the **All** option to print the entire merge or click another option to print only a selected portion of the merge.
- 7 Click **OK**.

### Did You Know?

**You can complete the mail merge manually.** In the document, click the Mailings tab, click the Find & Merge button, and then click Print Documents or Edit Individual Documents. When you're done, save the main document.

After you set up a data document and enter merge fields into the main document, you are ready to merge the document to create a new document with all the merged information. The new document contains individualized copies of the main document for each record in the data source. You can edit the new document to personalize individual copies in the main document, and then print the end result.



# Merging to E-mail

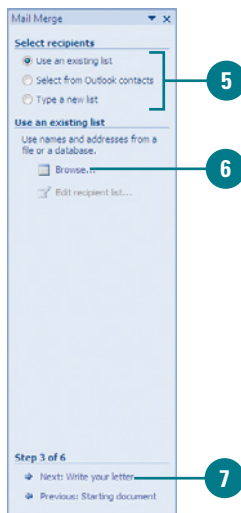
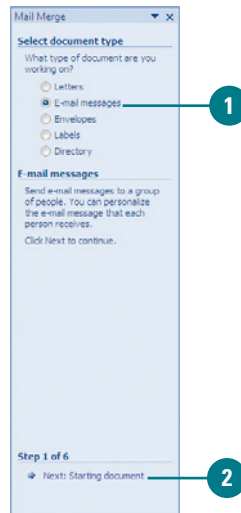
## Mail Merge to E-mail

- 1 On Step 1 of 6 in the Mail Merge task pane, click the **E-mail messages** option.
- 2 Click **Next: Starting document** on the task pane to display Step 2 of 6.
- 3 Click a starting document option (such as Use The Current Document).
- 4 Click **Next: Select Recipients** on the task pane to display Step 3 of 6.
- 5 Click a recipient option (such as Use an existing list or Type a new list).
- 6 Click **Browse**, double-click a data document, and then click **OK** to select the mail recipients.
- 7 Click **Next: Write your e-mail message** on the task pane to display Step 4 of 6.

### Did You Know?

**You can set up the main document for E-mail messages manually.** Create a new or existing document, click the Mailings tab, click the Start Mail Merge button, and then click E-mail Messages.

Instead of merging data to create a form letter you can print, you can merge data to an e-mail document. The steps to merge an e-mail document rather than a letter are essentially the same, but there are a few small differences.



8 Type your e-mail, click a location in the document, lick one of the field items on the task pane (such as Address Block or Greeting Line), select the options you want, and then click **OK**.

9 Click **Next: Preview your e-mail message** on the task pane to display Step 5 of 6.

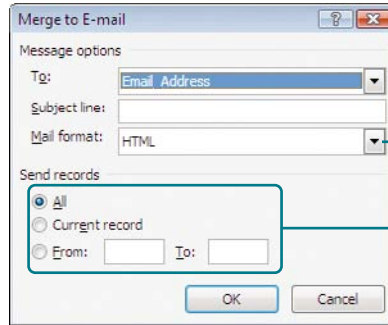
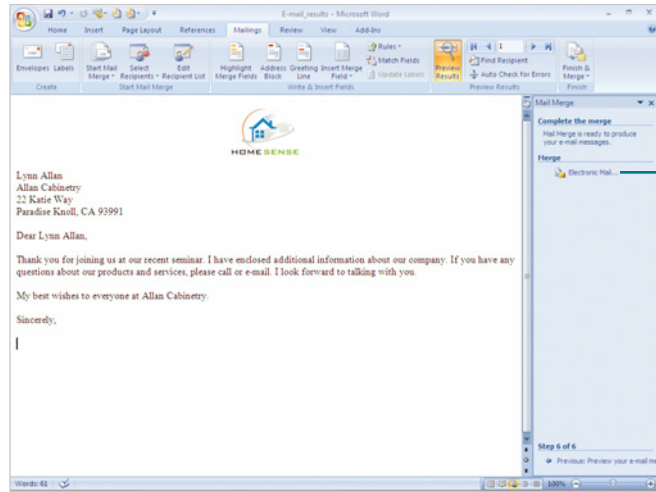
10 Preview the data in the letter, and then make any changes.

11 Click **Next: Complete the merge** on the task pane to display Step 6 of 6.

12 Click **Electronic Mail**.

13 Select the mail format you want to use, normal text, HTML mail, or sending the document as an attachment.

14 Specify the range of records you want to send, and then click **OK**.



# Creating Merged Mailing Labels

Microsoft  
Certified  
Application  
Specialist

WD07S-4.5.1,  
WD07S-4.5.2

## Create Labels Using Mail Merge

- 1 Click the **Mailings** tab.
- 2 Click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**.

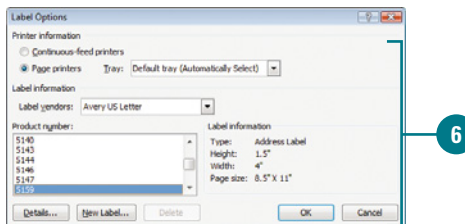
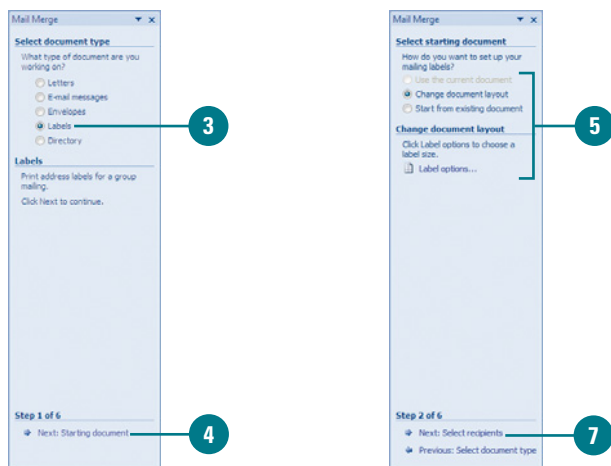
The Mail Merge task pane opens, displaying Step 1 of 6.

- 3 Click the **Labels** option.
- 4 Click **Next: Starting document** on the task pane to display Step 2 of 6.
- 5 Click a starting document option (such as Change Document Layout), and then click **Label Options**.
- 6 Select the label options you want, click **OK**.
- 7 Click **Next: Select recipients** on the task pane to display Step 3 of 6.

### Did You Know?

*You can set up the main document for labels manually.* Create a new or existing document, click the Mailings tab, click the Start Mail Merge button, click Labels, select the label options you want, and then click OK.

You can use a data document to create more than one kind of merge document. For example, you can use a data document to print mailing labels or envelopes to use with your mailing. The process for creating mailing labels is similar to the mail merge process for form letters, except that you insert the merge field into a main document that contains a table with cells in a specific size for labels. During the process for creating mailing labels, you can select brand-name labels in a specific size, such as Avery Standard 1529. After you merge the data into the main document with the labels, you can print the labels on a printer.



8 Click a recipient option button (such as Use An Existing List or Type A New List), click **Browse**, double-click a data document, select a data source and click **OK**, select the recipients you want and then click **OK**.

9 Click **Next: Arrange your labels** at the bottom of the task pane. Step 4 of 6 appears on the task pane.

10 Click in the first label of the document, and then click one of the field items on the task pane (such as Address Block or Greeting Line), select the options you want, and then click **OK**.

11 Click **Update all labels**.

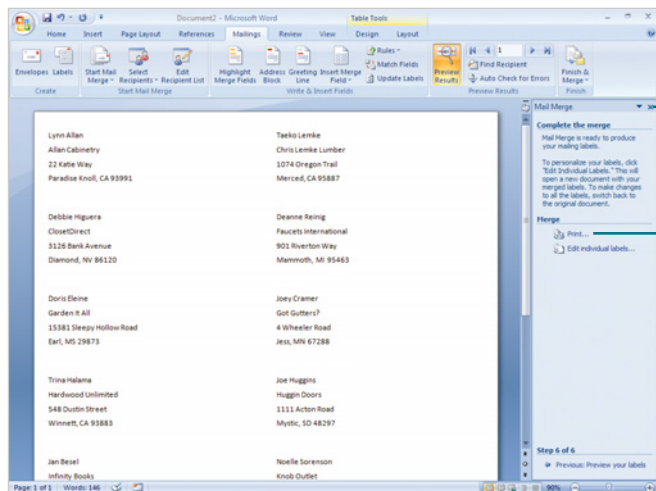
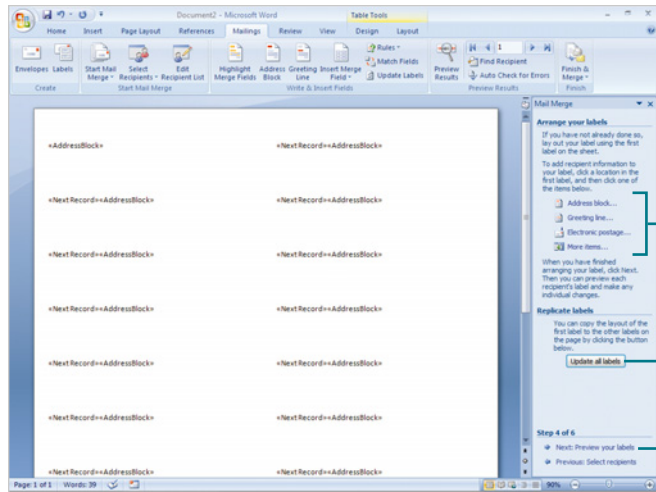
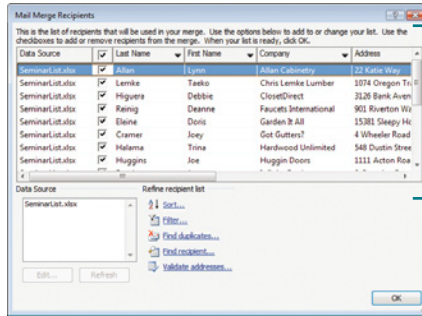
12 Click **Next: Preview your labels** at the bottom of the task pane. Step 5 of 6 appears on the task pane.

13 Preview the data in the letter and make any changes, and then click **Next: Complete the merge** at the bottom of the task pane. Step 6 of 6 appears on the task pane.

14 Click **Print**.

15 Click a Print Records option and then click **OK**.

16 When you're done, click the **Close** button on the task pane, and then save the form letter.



# Creating Merged Envelopes

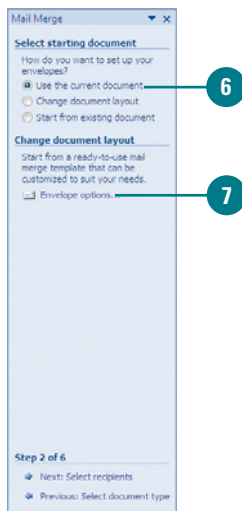
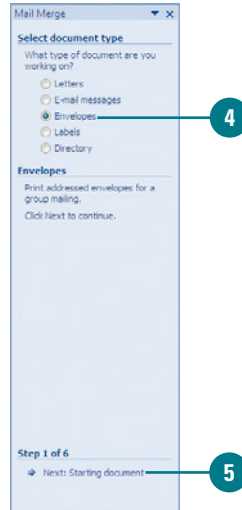
## Create Envelopes

- 1 Click the **Office** button, click **New**, click **Blank Document**, and then click **Create**.
- 2 Click the **Mailings** tab.
- 3 Click the **Start Mail Merge** button, and then click **Step by Step Mail Merge Wizard**. The Mail Merge task pane opens. Step 1 of 6 appears on the task pane.
- 4 Click the **Envelopes** option.
- 5 Click **Next: Starting document** on the task pane to display Step 2 of 6.
- 6 If necessary, click the **Use the current document** option.
- 7 Click **Envelope Options**.

### Did You Know?

*You can set up the main document for envelopes manually.* To create a new or existing document, click the Mailings tab, click the Start Mail Merge button, click Envelopes, select the envelope options you want, and then click OK.

If your printer is set up to accept a batch feed of blank envelopes, you can skip the steps required to create mailing labels, and merge the addresses from the data document directly onto the envelopes. To determine if your printer supports this function, consult the documentation that accompanied your hardware.



8 Click the **Envelope Options** tab.

9 Select the appropriate envelope size and layout.

10 Click the **Printing Options** tab.

11 Select the printer, feed type, and tray to use for printing.

12 Click **OK**.

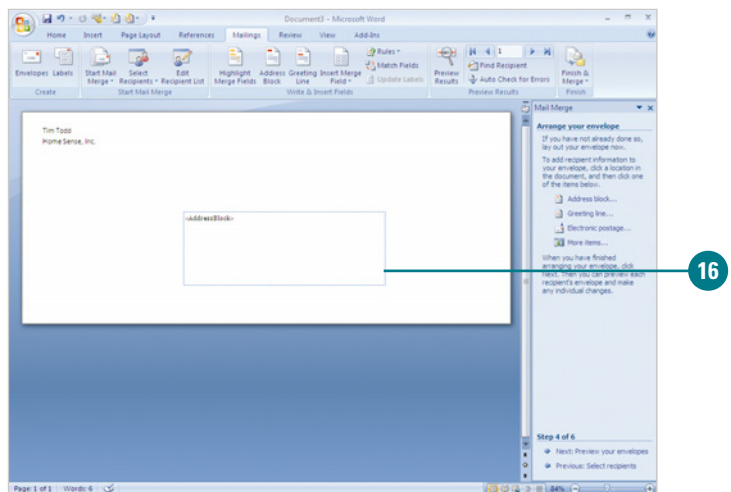
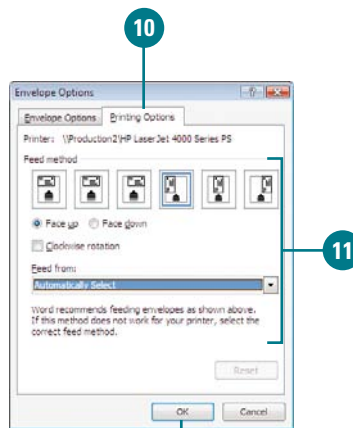
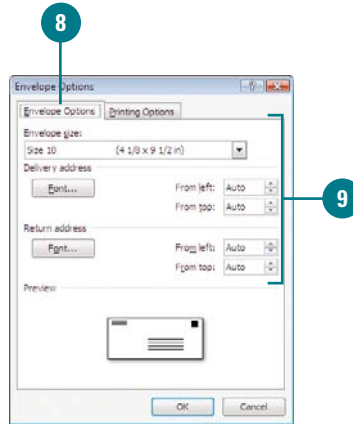
13 Click **Next: Select recipients** on the task pane to display Step 3 of 6.

14 If necessary, click the **Use an existing list** option, and then choose the same list you used mail merge to print the letters.

15 Click **Next: Arrange your envelope** on the task pane to display Step 4 of 6.

16 If you want to include a return address on the mailing, type it now, position the insertion point where you want the recipient's mailing address to appear, click **Address Block** on the task pane to insert the merge field, select your options, and then click **OK**.

17 Complete the remaining steps just as you would with creating mailing labels.



# Addressing Envelopes and Labels

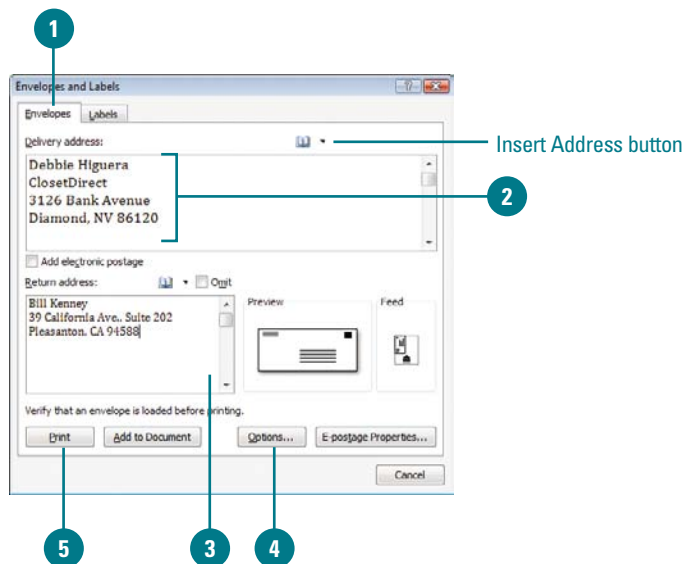
Microsoft  
Certified  
Application  
Specialist

WD07S-4.5.3

## Address and Print Envelopes

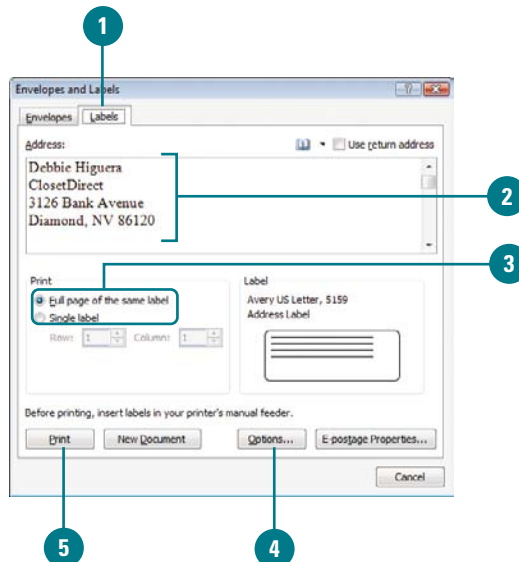
- 1 Click the **Mailings** tab, click **Envelopes** button, and then click the **Envelopes** tab, if necessary.
- 2 Type the recipients name and address, or click the **Insert Address** button to search for it.
- 3 Type your name and address.
- 4 Click **Options**, select a size, placement, bar code, font, and then click **OK**.
- 5 Insert an envelope in your printer, and then click **Print**.

When you write a letter, you can use Word to print an address on an envelope or mailing label. Word scans your document to find a delivery address. You can use the one Word finds, enter another one, or select one from your Address Book. You can specify a return address, or you can omit it. Addresses can contain text, graphics, and bar codes. The POSTNET bar code is a machine-readable depiction of a U.S. zip code and delivery address; the FIM-A code identifies the front of a courtesy reply envelope. You can print a single label or multiple labels.



## Address and Print Mailing Labels

- 1 Click the **Mailings** tab, click **Labels** button, and then click the **Labels** tab.
- 2 Type the recipients name and address, or the Insert Address button to search for it.
- 3 Select which labels to print.
- 4 Click **Options**, select a type or size, and then click **OK**.
- 5 Insert labels in your printer, and then click **Print**.



# Proofing and Printing Documents

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11

## Introduction

After finalizing your document, there are some necessary steps you should do prior to printing. You can check for inconsistent formatting in your document. If you have established a certain style, checking your formatting can ensure that your document is formatted correctly.

You can also look up and use synonyms and antonyms to make your document more interesting. Under the Review tab, you can use a Thesaurus, translate a word or document into another language, or even use multiple languages with the Word program. Of course, no document should be printed without first going through the spell checker to check your spelling and grammar usage. You can add personalized names, terms, company information to your spell checker, so that when you are using the spell checker, it won't make unnecessary stops on words that are spelled and used correctly.

If your document is larger, page numbers might be necessary to help your reader follow along. You can insert page numbers for single or double sided printing, and you can even add chapter numbers. When getting ready to print, you might want to preview your document to make sure that your margins are appropriate for your text and printing. If, after previewing your document, you find that some text should be on a different page, you can insert page breaks to end the page early, so that common text stays together on a page. You can also insert a whole new page in your document.

When it's finally time to print, you can print all or part of a document, change your page orientation to print landscape or portrait, or even print a two-sided document

## What You'll Do

**Check for Inconsistent Formatting**

**Check Spelling and Grammar**

**Use Custom Dictionaries**

**Change Proofing Options**

**Find the Right Words**

**Use the English Assistant**

**Translate Text to Another Language**

**Set Up Page Margins**

**Adjust Paper Settings**

**Control the Way Pages Break**

**Insert New Pages and Sections**

**Preview a Document**

**Print a Document**

**Print a Double-Side Document**

# Checking for Inconsistent Formatting

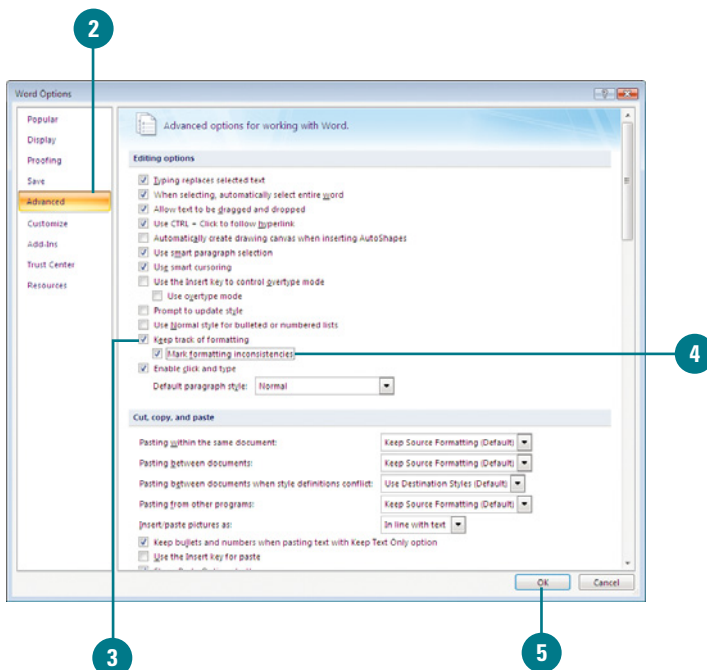


## Change Editing Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click the **Advanced**.
- 3 Select the **Keep track of formatting** check box.
- 4 Select the **Mark formatting inconsistencies** check box.
- 5 Click **OK**.

The formatting inconsistencies are indicated by a blue wavy underline.

By default, Word does not automatically check for inconsistent formatting as you create documents. To instruct Word to mark the document for inconsistent formatting, and also to check documents that you have already prepared for inconsistent formatting, you need to change editing options in the Word Options dialog box. Word will automatically detect any inconsistent format elements and mark them with a blue wavy underline. When you turn on the Keep track of formatting option you can also use the Select Text with Similar formatting command on the shortcut menu that appears if you right-click selected text.

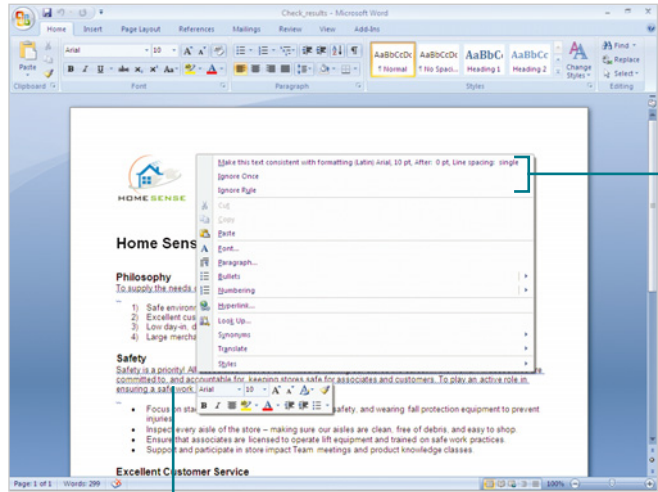


## Change Inconsistent Formatting

- 1 In the document, right-click any wavy, blue line to open a list of Formatting commands.
- 2 Click the appropriate choice based on the error in the text to make the necessary correction.
  - ◆ **Make this text consistent with formatting...**
  - ◆ **Ignore Once.**
  - ◆ **Ignore Rule.**

### Did You Know?

**You can find similar inconsistent formatting quickly.** You can also click the Select button on the Home tab, and then click Select Text with Similar Formatting to facilitate global changes of mistakes that have been repeated throughout the document.

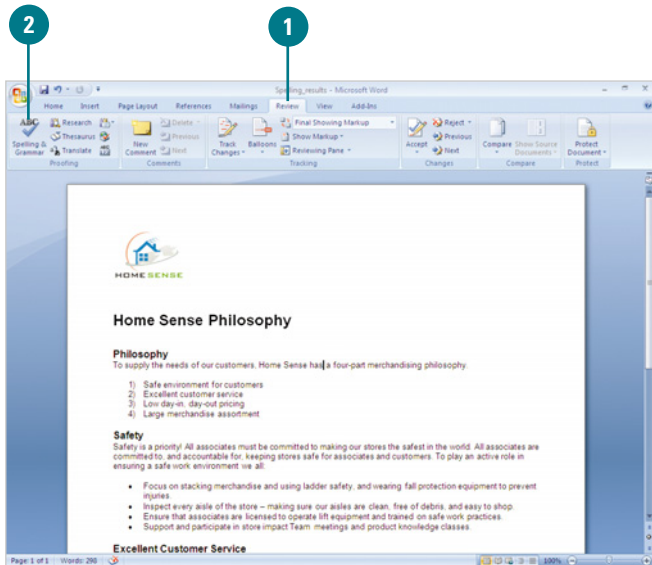


# Checking Spelling and Grammar

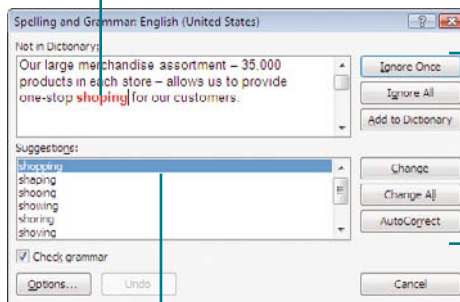
## Check Spelling All at Once

- 1 Click the **Review** tab.
- 2 Click the **Spelling** button.
- 3 If the Spelling dialog box opens, choose an option:
  - ◆ Click **Ignore Once** to skip the word, or click **Ignore All** to skip every instance of the word.
  - ◆ Click **Add to Dictionary** to add a word to your dictionary, so it doesn't show up as a misspelled word in the future.
  - ◆ Click a suggestion, and then click **Change** or **Change All**.
  - ◆ Select the correct word, and then click **AutoCorrect** to add it to the AutoCorrect list.
  - ◆ If no suggestion is appropriate, click in the document and edit the text yourself. Click **Resume** to continue.
- 4 Word will prompt you when the spelling check is complete, or you can click **Close** to end the spelling check.

A document's textual inaccuracies can distract the reader, so it's important that your text be error-free. Word provides a spelling checker—common for all Office 2007 programs (**New!**)—so that you can check the spelling in an entire document for words not listed in the dictionary (such as misspellings, names, technical terms, or acronyms) or duplicate words (such as *the the*). You can correct these errors as they arise or after you finish the entire document. You can use the Spelling button on the Review tab to check the entire document using the Spelling dialog box, or you can avoid spelling errors on a document by enabling the AutoCorrect feature to automatically correct words as you type.



Word not recognized



Current dictionary

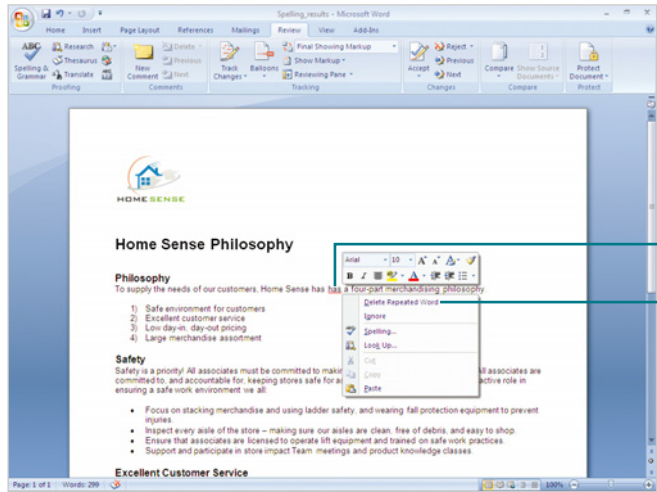
## Correct Spelling and Grammar as you Type

- 1 Right-click a word with a red or green wavy underline.
- 2 Click a substitution, or click Ignore All (or Grammar) to skip any other instances of the word.

### Did You Know?

**You can add a familiar word to your dictionary.** Right-click the wavy line under the word in question, and then click Add to Dictionary.

**You can hyphenate words.** Click the Page Layout tab, click the Hyphenation button, and then click Automatic.



## For Your Information

### Finding out Document Readability

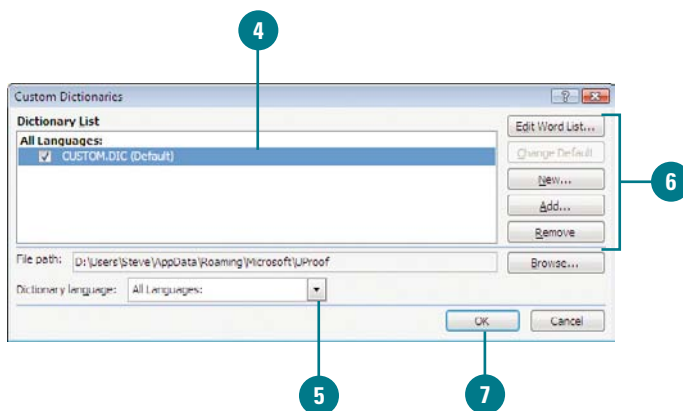
Word can help you determine the readability of your documents. When you set the readability option and check spelling and grammar, Word displays information and statistics about the reading level of the document, including the Flesch Reading Ease score and the Flesch-Kincaid Grade Level score. The readability scores are based on the average number of syllables per word and words per sentence. To display readability statistics, click the Office button, click Word Options, click Proofing in the left pane, select the Check grammar with spelling check box, select the Show readability statistics check box, and then click OK.

# Using Custom Dictionaries

## Use a Custom Dictionary

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**.
- 3 Click **Custom Dictionaries**.
- 4 Select the check box next to **CUSTOM.DIC (Default)**.
- 5 Click the **Dictionary language** list arrow, and then select a language for a dictionary.
- 6 Click the options you want:
  - ◆ Click **Edit Word List** to add, delete, or edit words.
  - ◆ Click **Change Default** to select a new default dictionary.
  - ◆ Click **New** to create a new dictionary.
  - ◆ Click **Add** to insert an existing dictionary.
  - ◆ Click **Remove** to delete a dictionary.
- 7 Click **OK** to close the Custom Dictionaries dialog box.
- 8 Click **OK**.

Before you can use a custom dictionary, you need to enable it first. You can enable and manage custom dictionaries by using the Custom Dictionaries dialog box (**New!**). In the dialog box, you can change the language associated with a custom dictionary, create a new custom dictionary, or add or remove an existing custom dictionary. If you need to manage dictionary content, you can also change the default custom dictionary to which the spelling checker adds words, as well as add, delete, or edit words. All the modifications you make to your custom dictionaries are shared with all your Microsoft Office programs, so you only need to make changes once (**New!**). If you mistakenly type an obscene or embarrassing word, such as *ass* instead of *ask*, the spelling checker will not catch it because both words are spelled correctly. You can avoid this problem by using an exclusion dictionary (**New!**). When you use a language for the first time, Office automatically creates an exclusion dictionary. This dictionary forces the spelling checker to flag words you don't want to use.



## Find and Modify the Exclusion Dictionary

1 In Windows Explorer, go to the folder location where the custom dictionaries are stored.

- ◆ **Windows Vista.** `C:\Users\user name\AppData\Roaming\Microsoft\UProof`
- ◆ **Windows XP.** `C:\Documents and Settings\user name\Application Data\Microsoft\UProof`

**TROUBLE?** If you can find the folder, change folder settings to show hidden files and folders.

2 Locate the exclusion dictionary for the language you want to change.

- ◆ The file name you want is `ExcludeDictionary Language CodeLanguage LCID.lex`.

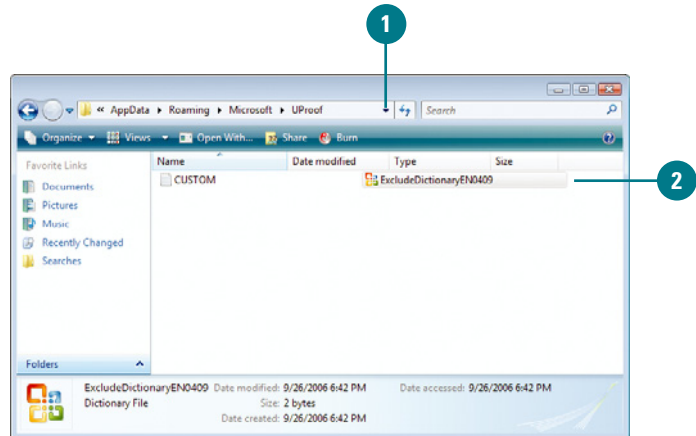
For example, `ExcludeDictionary EN0409.lex`, where EN is for English.

Check Word Help for an updated list of LCID (Local Identification Number) number for each language.

3 Open the file using Microsoft Notepad or WordPad.

4 Add each word you want the spelling check to flag as misspelled. Type the words in all lowercase and then press Enter after each word.

5 Save and close the file.



# Changing Proofing Options

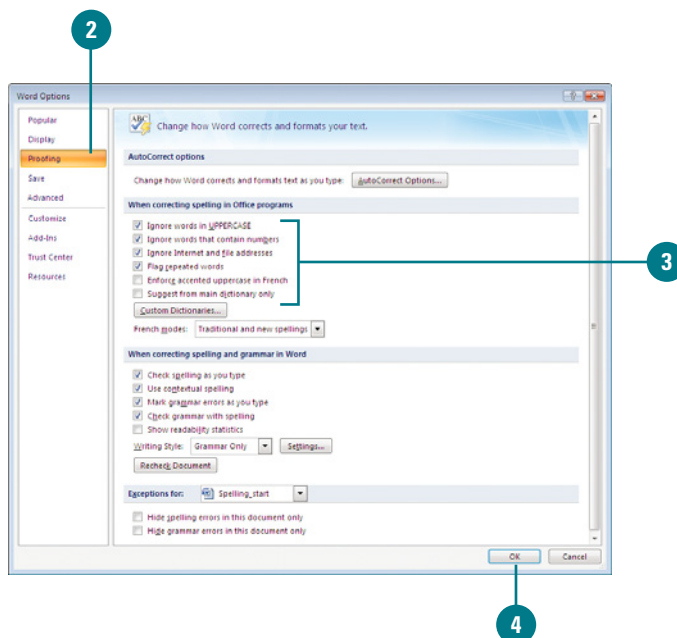
## Change Office Spelling Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**.
- 3 Select or clear the spelling options you want.
  - ◆ **Ignore words in UPPERCASE.**
  - ◆ **Ignore words that contain numbers.**
  - ◆ **Ignore Internet and file addresses (New!).**
  - ◆ **Flag repeated words (New!).**
  - ◆ **Enforce accented uppercase in French (New!).**
  - ◆ **Suggest from main dictionary only (New!).** Select to exclude your custom dictionary.
- 4 Click **OK**.

### Did You Know?

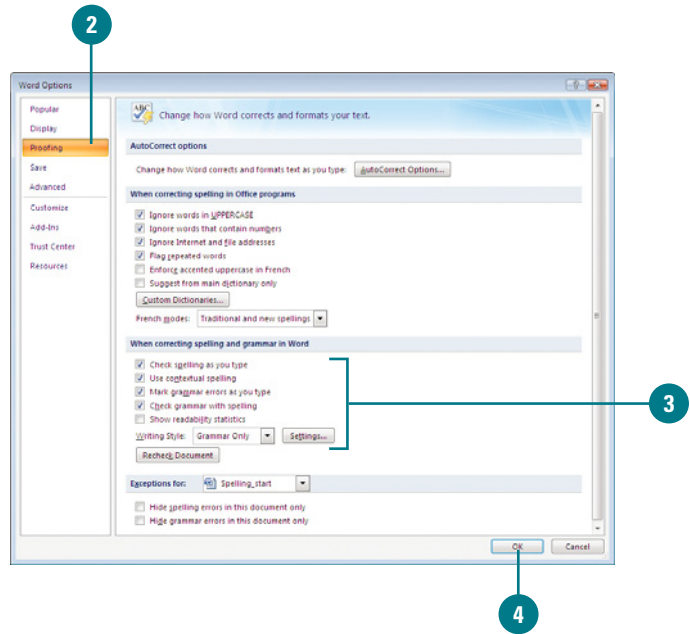
**You can hide spelling or grammar errors for a specific document.** Open the document you want to use, click the Office button, click Word Options, click Proofing, click the Exceptions for list arrow, select the file you want, select the check boxes to hide spelling or grammar error for this document only, and then click OK.

You can customize the way Microsoft Office spell checks a document by selecting proofing settings in Options. Some spelling options apply to specific Office programs, such as Check spelling as you type, while other options apply to all Microsoft Office programs (**New!**), such as Ignore Internet and file addresses, and Flag repeated words. If you have ever mistakenly used *their* instead of *there*, you can use contextual spelling to fix it (**New!**). While you work in a document, you can set options to have the spelling checker search for mistakes in the background.



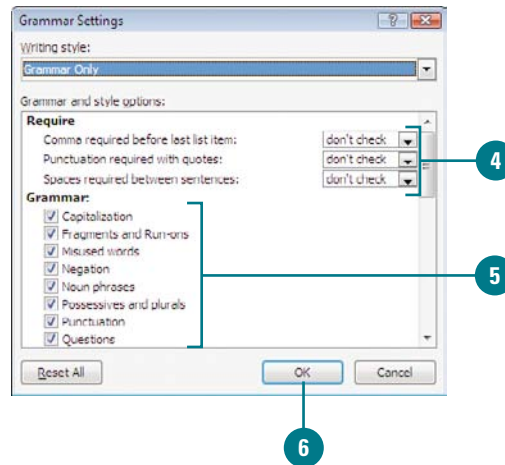
## Change Word Spelling Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**.
- 3 Select or clear the Word spelling options you want.
  - ◆ **Check spelling as you type.**
  - ◆ **Use contextual spelling.**
  - ◆ **Mark grammar errors as you type.**
  - ◆ **Check grammar with spelling.**
  - ◆ **Show readability statistics.**
  - ◆ **Writing Style.** Select to check grammar only or grammar and style.
- 4 Click **OK**.



## Change Grammar Settings

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Proofing**.
- 3 Click **Settings**.
- 4 Under **Require**, click the list arrow, and then select the option you want: **always**, **never**, or **don't check**.
- 5 Under **Grammar**, select the check boxes with the grammar and style options you want and clear the ones you don't want.
- 6 Click **OK**.
- 7 Click **OK**.

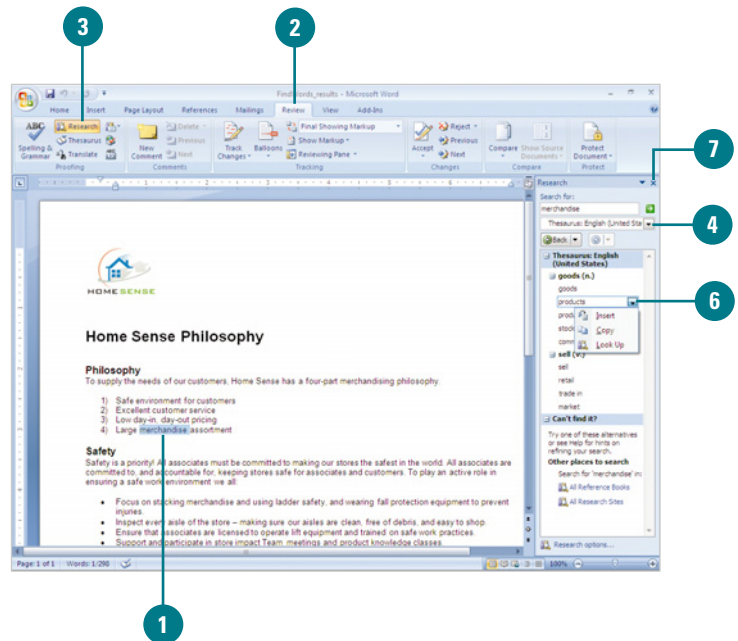


# Finding the Right Words

## Use the Thesaurus

- 1 Select the text you want to translate.
- 2 Click the **Review** tab.
- 3 Click the **Thesaurus** button.
- 4 Click the list arrow, and then select a **Thesaurus**, if necessary.
- 5 Point to the word in the Research task pane.
- 6 Click the list arrow, and then click one of the following:
  - ◆ **Insert** to replace the word you looked up with the new word.
  - ◆ **Copy** to copy the new word and then paste it within the document.
  - ◆ **Look Up** to look up the word for other options.
- 7 When you're done, click the **Close** button on the task pane.

Repeating the same word in a document can reduce a message's effectiveness. Instead, replace some words with synonyms or find antonyms. If you need help finding exactly the right words, use the shortcut menu to look up synonyms quickly or search a Thesaurus for more options. This feature can save you time and improve the quality and readability of your document. You can also install a Thesaurus for another language. Foreign language thesauruses can be accessed under Research Options on the Research task pane.

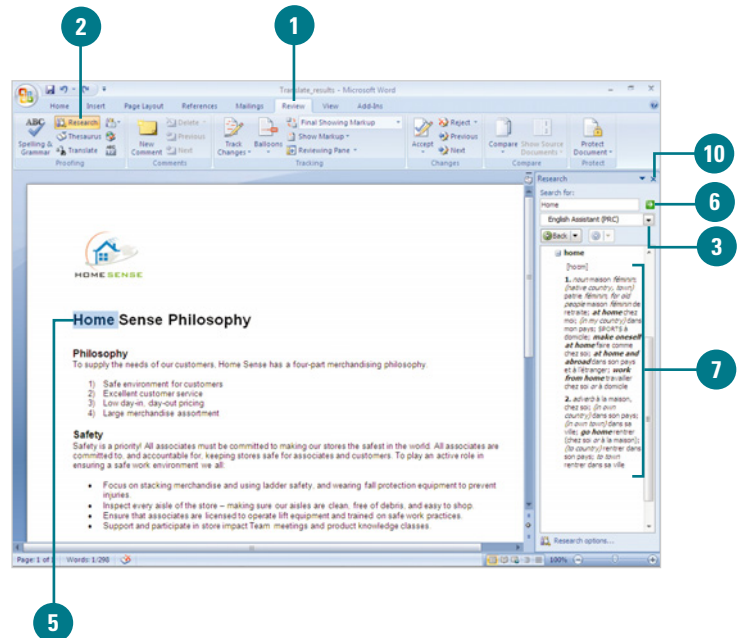


# Using the English Assistant

## Use the English Assistant

- 1 Click the **Review** tab.
- 2 Click the **Research** button.
- 3 Click the list arrow, and then click **English Assistant (PRC)** or **English Assistant (Japan)**.
- 4 If the English assistances are not available, click **Research options**, select the assistances you want, and then click **OK**.
- 5 Select the text in which you need help:
  - ◆ **Single word.** Press Alt, and then click the word.
  - ◆ **Phrase.** Type the phrase in the Search for box.
- 6 Click the **Start Searching** button (green arrow).
- 7 Point to the information in the Research task pane that you want to copy.
- 8 Click the list arrow, and then click **Copy**.
- 9 Paste the information into your document.
- 10 When you're done, click the **Close** button on the task pane.

The English Assistant (**New!**) is a Microsoft Office Online service that helps people for whom English is a second language write professional English text. The English Assistant provides tools for spelling, explanation, and usage. It also provides suggestions for synonyms and collocations (the association between two words that are typically or frequently used together), and related example sentences.



# Translating Text to Another Language



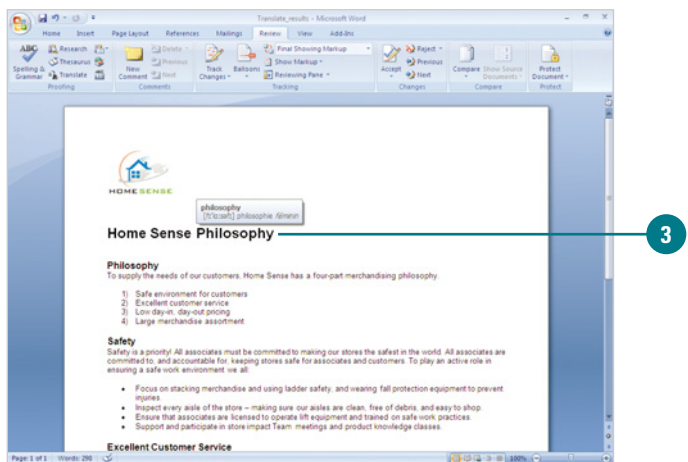
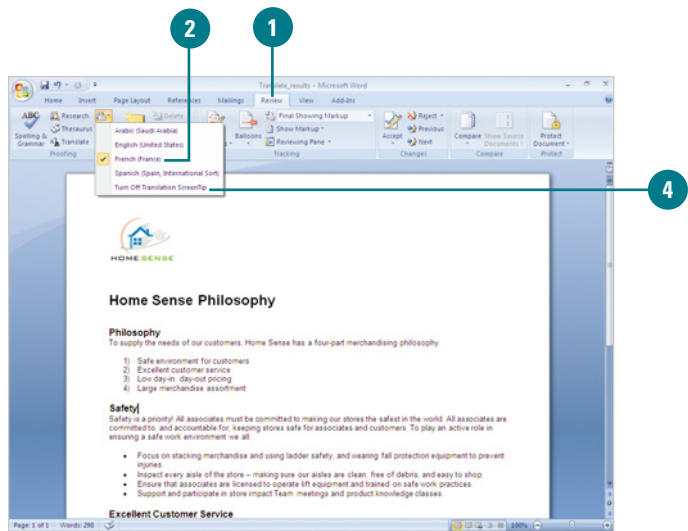
If you need to quickly translate a word into another language, you can enable an Enhanced ScreenTip (**New!**) that translates words when you point to them. The Translation ScreenTip supports English, French, and Spanish by default. However, other languages are available online at Microsoft Office Online. If you don't get the results you want, you can also use the Research task pane to translate text. With the Research task pane, you can translate single words or short phrases into different languages by using bilingual dictionaries. The Research task pane provides you with different translations and allows you to incorporate it into your work. If you need to translate an entire document for basic subject matter understanding, Web-based machine translation services are available. A machine translation is helpful for general meaning, but may not preserve the full meaning of the content.

## Translate Text Using the Translation ScreenTip

- 1 Click the **Review** tab.
- 2 Click the **Translation ScreenTip** button, and then click the language you want the word translated to.
- 3 Point to the word you want to display a ScreenTip next to the word with the translated word.
- 4 To turn off the Translation ScreenTip, click the **Translation ScreenTip** button, and then click **Turn Off Translation ScreenTip** to clear the check mark next to the command.

### See Also

See "Using Multiple Languages on page 385 for information on adding languages to use with Microsoft Office programs.



## Translate Text Using the Research Pane

1 Select the text you want to translate.

2 Click the **Review** tab.

3 Click the **Translate** button.

If this is the first you have used translation services, click **OK** to install the bilingual dictionaries and enable the service.

4 If necessary, click the list arrow, and then click **Translation**.

5 Click the **From** list arrow, and then select the language of the selected text.

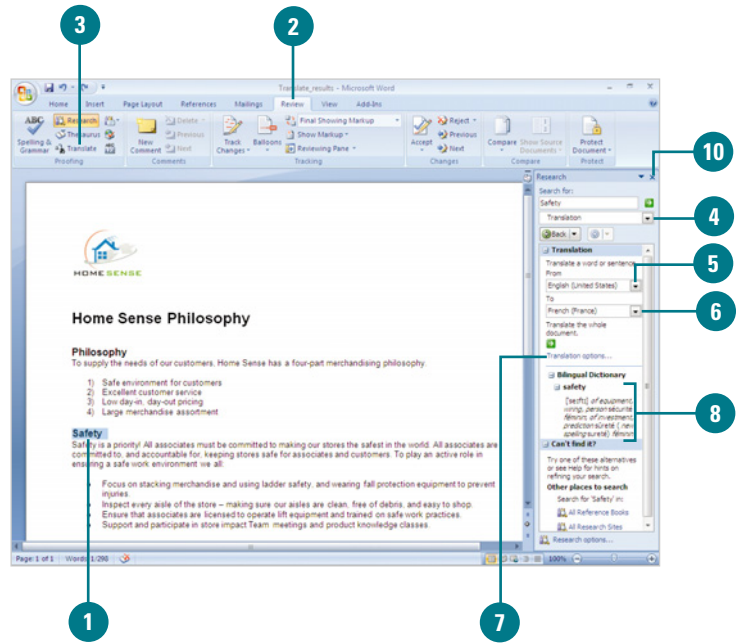
6 Click the **To** list arrow, and then select the language you want to translate into.

7 To customize which resources are used for translation, click **Translation options**, select the look-up options you want, and then click **OK**.

8 Right-click the translated text in the Research task pane that you want to copy, and then click **Copy**.

9 Paste the information into your document.

10 When you're done, click the **Close** button on the task pane.



# Setting Up Page Margins

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WD07S-1.2.1

## Adjust Margins Visually

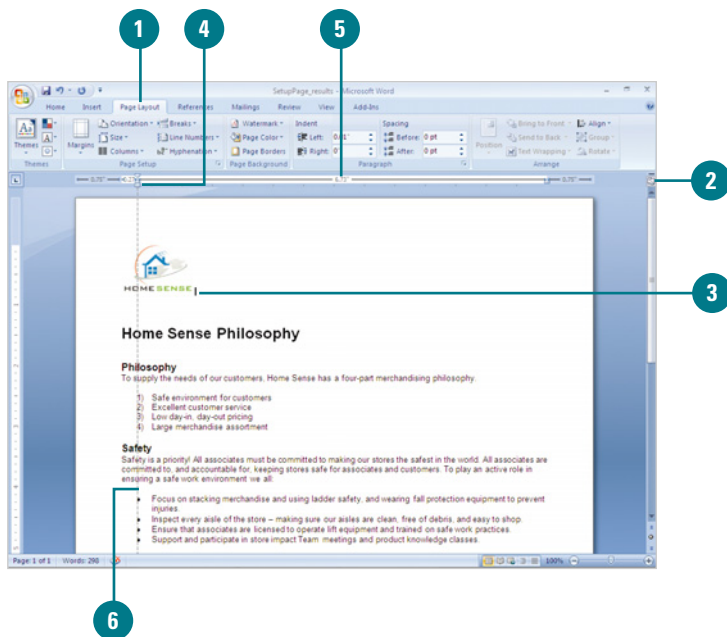
- 1 Click the **Print Layout** tab.
- 2 If necessary, click the **View Ruler** button to display it.
- 3 Select the text where you want to change the margins.
- 4 Position the pointer over a margin boundary on the horizontal or vertical ruler.
- 5 Press and hold **Alt**, and then click a margin boundary to display the measurements of the text and margin areas as you adjust the margins.
- 6 Drag the left, right, top, or bottom margin boundary to a new position.

### Did You Know?

**You can preset gutter measurements.**

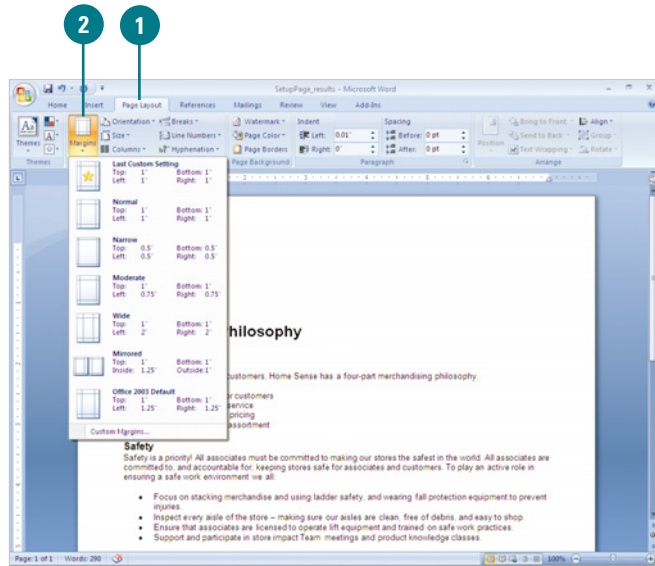
To set the gutters for normal bindings, display the Margins tab in the Page Setup dialog box, click the Multiple Pages list arrow, and then click Book Fold.

Margins are the blank space between the edge of a page and the text. The default setting for Word documents is 1.25 inches on the left and right, and 1 inch on the top and bottom. You can use the mouse pointer to adjust margins visually for the entire document, or you can use the Page Setup dialog box to set precise measurements for an entire document or a specific section. When you shift between portrait and landscape page orientation, the margin settings automatically change. If you need additional margin space for binding pages into a book or binder, you can adjust the left or right gutter settings. Gutters allow for additional margin space so that all of the document text remains visible after binding. Unless this is your purpose, leave the default settings in place.



## Select Standard Margins Quickly

- 1 Click the **Print Layout** tab.
- 2 Click the **Margins** button, and then click the margin setting you want:
  - ◆ **Normal.**
  - ◆ **Narrow.**
  - ◆ **Moderate.**
  - ◆ **Wide.**
  - ◆ **Mirrored.**
  - ◆ **Office 2003 Default.**

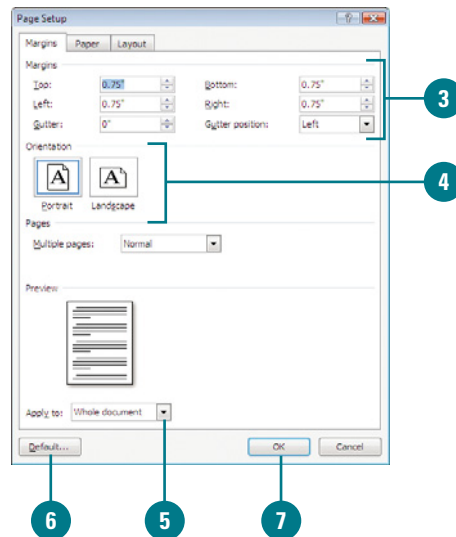


## Create Custom Margins Using Page Setup

- 1 Click the **Print Layout** tab.
- 2 Click the **Margins** button, and then click **Custom Margins**.

The Page Setup dialog box opens, displaying the Margins tab.

- 3 Type new margin measurements (in inches) in the Top, Bottom, Left, or Right boxes, and Gutter boxes.
- 4 Click the page orientation you want.
- 5 Click the **Apply to** list arrow, and then click **Selected Text, This Point Forward, or Whole Document**.
- 6 To make the new margin settings the default for all new Word documents, click **Default**, and then click **Yes**.
- 7 Click **OK**.



# Adjusting Paper Settings

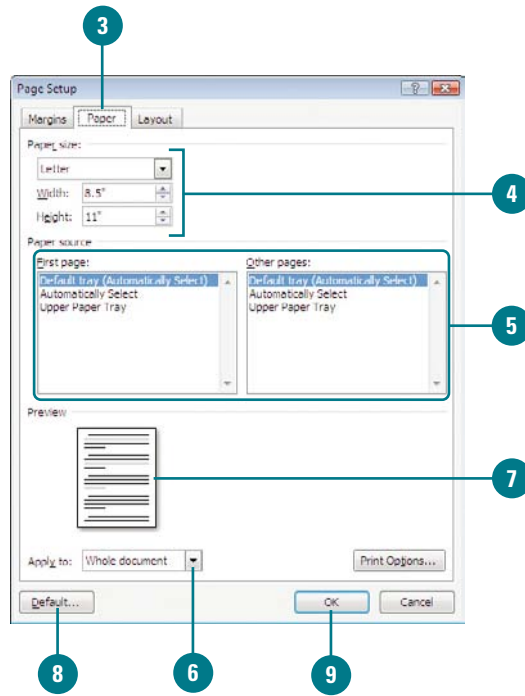
## Set the Paper Size

- 1 Click the **Page Layout** tab.
- 2 Click the **Page Setup** Dialog Box Launcher.
- 3 Click the **Paper** tab.
- 4 Click the **Paper size** list arrow, and then select the paper size you want, or specify a custom size.
- 5 Select the paper source for the first page and other pages.
- 6 Click the **Apply to** list arrow, and then click **This section**, **This point forward**, or **Whole document**.
- 7 Verify your selections in the Preview box.
- 8 To make your changes the default settings for all new documents, click **Default**, and then click **Yes**.
- 9 Click **OK**.

### Did You Know?

**You can improve printing speed.** If printing is slow, you can turn off background printing to speed up the process. In the Page Setup dialog box on the Paper tab, click Print Options, click Advanced in the left pane, clear the Print in Background check box, and then click OK.

Every document you produce and print might need a different page setup. You can achieve the look you want by printing on a standard paper size (such as letter, legal, or envelope), international standard paper sizes, or any custom size that your printer accepts. The default setting is 8.5 x 11 inches, the most common letter and copy size. You can also print several pages on one sheet. If you want to create a custom paper size, you can input custom settings for special print jobs on odd-sized paper.

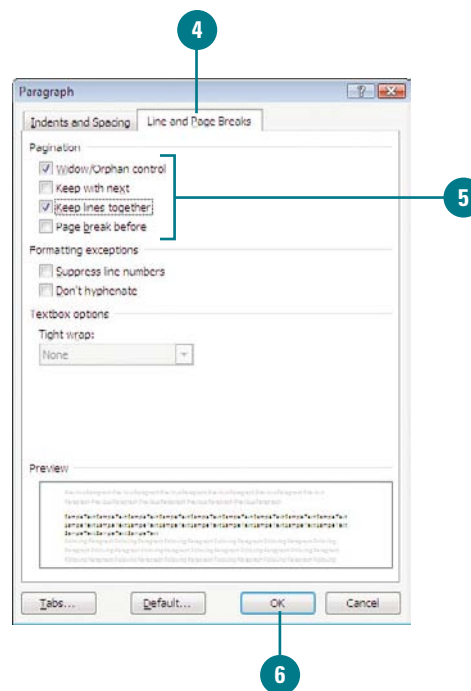


# Controlling the Way Pages Break

When you're creating a document, sometimes a line of text, known as a widow or orphan, in a paragraph doesn't fit on a page and looks out of place on the next page. A **widow** is the last line of a paragraph printed by itself at the top of a page. An **orphan** is the first line of a paragraph printed by it self at the bottom of a page. You can use the Widow/Orphan Control option to automatically correct the problem. If a widow or orphan occurs, Word adjusts the paragraph to make sure at least two lines appear together on the next page. When two paragraphs need to remain grouped to maintain their impact, regardless of where the normal page break would have occurred, you can keep paragraphs together on a page or in a column. If you need to start a paragraph at the top of a page, you can automatically generate a page break before a paragraph.

## Control Pagination

- 1 Select the paragraph in which you want to control.
- 2 Click the **Page Layout** tab.
- 3 Click the **Paragraph** Dialog Box Launcher.
- 4 Click the **Line and Page Breaks** tab.
- 5 Choose an option:
  - ◆ Select the **Widow/Orphan control** check box to avoid paragraphs ending with a single word on a line or a single line at the top of a page.
  - ◆ Select the **Keep with next** check box to group paragraphs together.
  - ◆ Select the **Keep lines together** check box to keep paragraph lines together.
  - ◆ Select the **Page break before** check box to precede a paragraph with a page break.
- 6 Click **OK**.



# Inserting New Pages and Sections

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WD07S-2.3.1,  
WD07S-2.3.2

## Insert and Delete a Hard Page Break

- 1 Click where you want to insert a hard page break.
- 2 Use one of the following:
  - ◆ **Page Break.** Click the **Insert** tab, and then click the **Page Break** button.
  - ◆ **Blank Page.** Click the **Insert** tab, and then click the **Blank Page** button.
  - ◆ **Page or Section Break.** Click the **Page Layout** button, and then click the page break option you want.

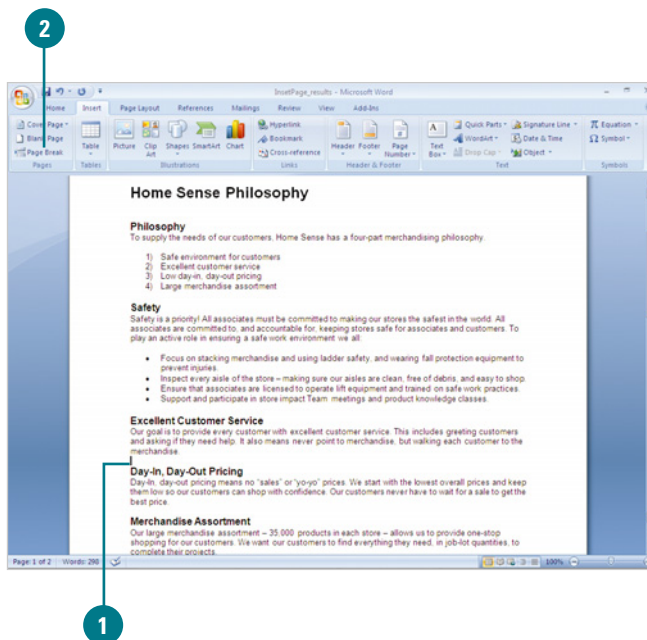
**TIMESAVER** Press **Ctrl+Enter** to insert a page break.

- 3 To delete a page break, click the page break in Print Layout view, and then press the Delete key. To move a page break, drag it to a new location.

### Did You Know?

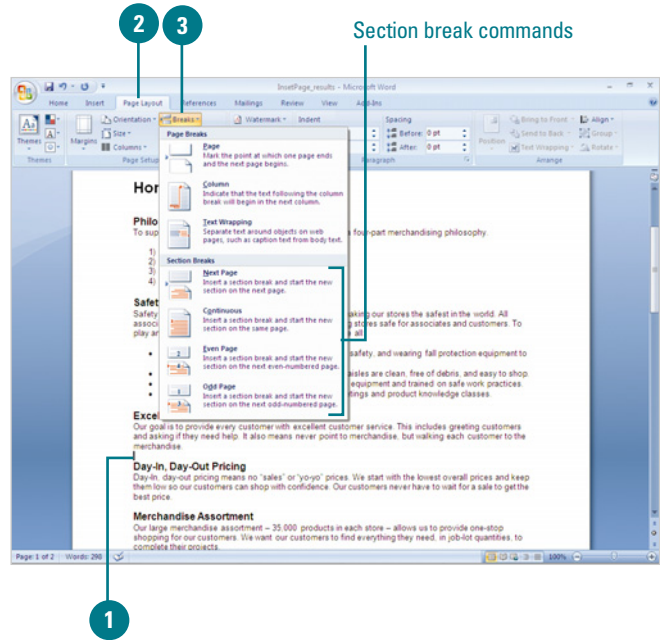
**You can opt to start a new line, but not a new paragraph.** Insert a text wrapping break to force text to the next line in the same paragraph—the perfect tool to make a phrase fall on one line. Press **Shift+Enter** where you want to insert a text wrapping break.

When you fill a page, Word inserts a page break and starts a new page. As you add or delete text, this **soft page break** moves. A soft page break appears as a dotted gray line in Normal view. To start a new page before the current one is filled, insert a **hard page break** that doesn't shift as you edit text. A hard page break appears as a dotted gray line with the text **Page Break** centered in Normal view. A **section** is a mini-document within a document that stores margin settings, page orientation, page numbering, and so on. In Page Layout view, you can show or hide the white space on the top and bottom of each page and the gray space between pages.



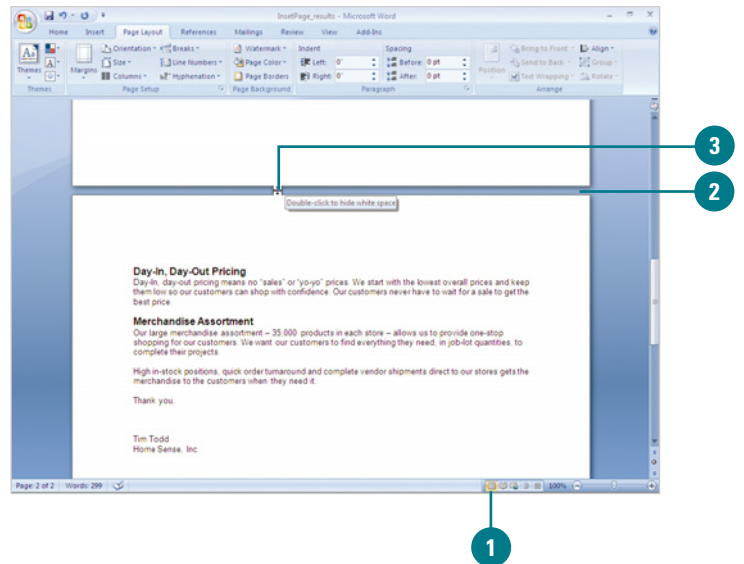
## Insert and Delete a Section Break

- 1 Click where you want to insert a section break.
- 2 Click the **Page Layout** tab.
- 3 Click **Page Break** button, and then select the type of section break you want.
  - ◆ **Next Page.** Starts the section on a new page.
  - ◆ **Continuous.** Starts the section wherever the point is located.
  - ◆ **Even Page.** Starts the section on the next even-numbered page.
  - ◆ **Odd Page.** Starts the section on the next odd-numbered page.
- 4 To delete a section break, click the section break in Print Layout view, and then press Delete.



## Show or Hide White Space Between Pages

- 1 Click the **Print Layout View** button.
- 2 Scroll to the bottom of a page, and then point to the gap between two pages. (The Hide White Space cursor or Show White Space cursor appears.)
- 3 Click the gap between the pages to show or hide the white space.



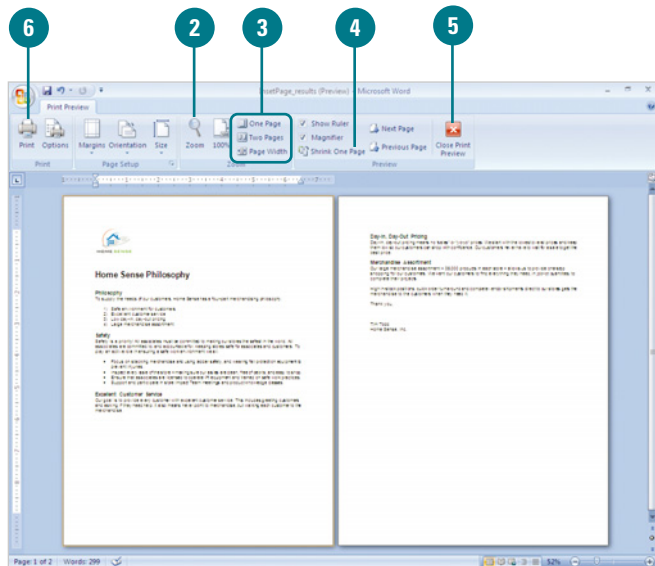
# Previewing a Document



Before printing, you should verify that the page looks the way you want. You save time, money, and paper by avoiding duplicate printing. **Print Preview** shows you the exact placement of your data on each printed page. You can view all or part of your document as it will appear when you print it. The Print Preview tab makes it easy to zoom in and out to view data more comfortably, display pages one or two at a time, set margins and other page options, preview page breaks, and print. If your pages are a little bit too long to fit on a page, you can use the Shrink One Page button (**New!**) and Word tries to reduce the font and spacing size to make it fit. You can also edit text (**New!**) in Print Preview by turning the Magnifier option off.

## Preview a Document

- 1 Click the **Office** button, point to **Print**, and then click **Print Preview**.
- 2 Click the **Zoom** button, or position the Zoom pointer anywhere on the document, and then click it to enlarge a specific area of the page.
- 3 To show one or two pages at a time, click the **One Page** or **Two Pages** button.
  - ◆ If you display one page at a time, click the **Next Page** and **Previous Page** button to navigate in Print Preview.
  - ◆ If you display one page at a time, you can click the **Page Width** button to display the page to fill the width of the window.
- 4 To have Word try to reduce the document by a page, click the **Shrink One Page** button. Word tries to reduce the font and spacing size.
- 5 If you do not want to print from Print Preview, click the **Close Print Preview** button to return to the document.
- 6 If you want to print from Print Preview, click the **Print** button.

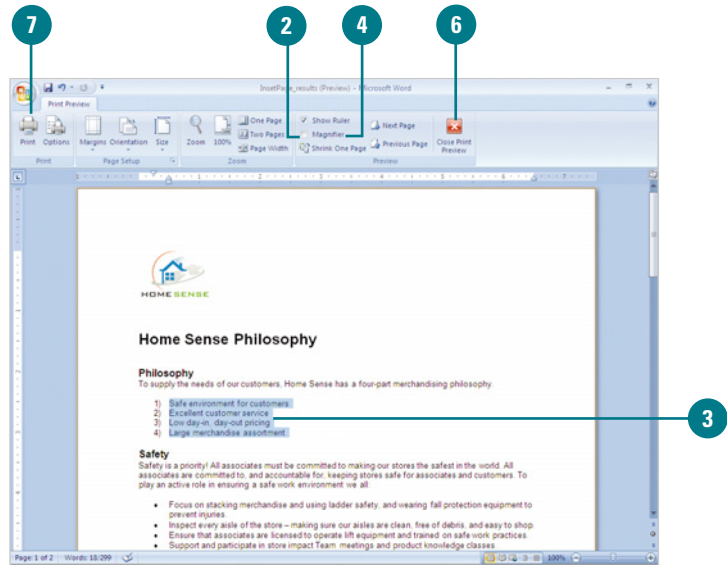


## Edit and Zoom a Document in Print Preview

- 1 Click the **Office** button, point to **Print**, and then click **Print Preview**.
- 2 Clear the **Magnifier** check box.  
The cursor changes to the I-beam, where you can edit the document.
- 3 Edit the document as normal.
- 4 Select the **Magnifier** check box.  
The cursor changes to the Zoom pointer (magnifying glass) where you can zoom in and out.
- 5 Position the Zoom pointer anywhere on the document, and then click it to enlarge a specific area of the page. Right-click it to reduce a specific area of the page.
- 6 If you do not want to print from Print Preview, click the **Close Print Preview** button to return to the document.
- 7 If you want to print from Print Preview, click the **Print** button.

### Did You Know?

**You can preview your work from the Print dialog box.** In the Print dialog box, click Preview. After previewing, you can click the Print button on the Print Preview tab to print the document or click the Close Print Preview button to return to your document.



# Printing a Document

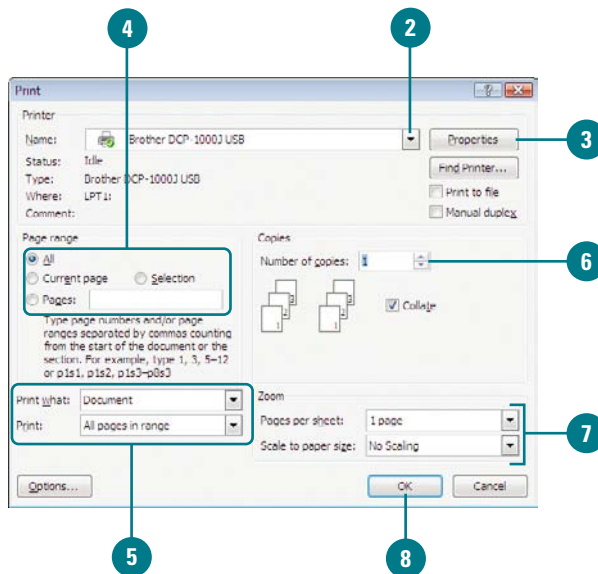
## Print All or Part of a Document

- 1 Click the **Office** button, point to **Print**, and then click **Print**.

**TIMESAVER** To print without the Print dialog box, press **Ctrl+P**, click the Quick Print button on the Quick Access Toolbar, or click the Office button, point to Print, and then click Quick Print.

- 2 If necessary, click the **Name** list arrow, and then click the printer you want to use.
- 3 To change printer properties, click **Properties**, select the options you want, and then click **OK**.
- 4 Select whether you want to print the entire document or only the pages you specify.
- 5 Select what you want to print: Document, Document properties, Document showing markup, List of markup, Styles, Building Block entries, or Key assignment.
- 6 Click the **Number of copies** up or down arrow to specify the number of copies you want.
- 7 Specify the number of pages per sheet and the scale to paper size you want.
- 8 Click **OK**.

When you're ready to print your document, you can choose several printing options. You can print all or part of any document and control the appearance of many features, such as whether to print document properties, document markup, styles, or building blocks entries. You can quickly print a copy of your document to review it by clicking the Quick Print button on the Quick Access Toolbar or on the Office menu Print submenu. You can also use the Print dialog box to specify several print options, such as choosing a new printer, selecting the number of pages in the document you want printed, and specifying the number of copies.



# Printing a Double-Sided Document

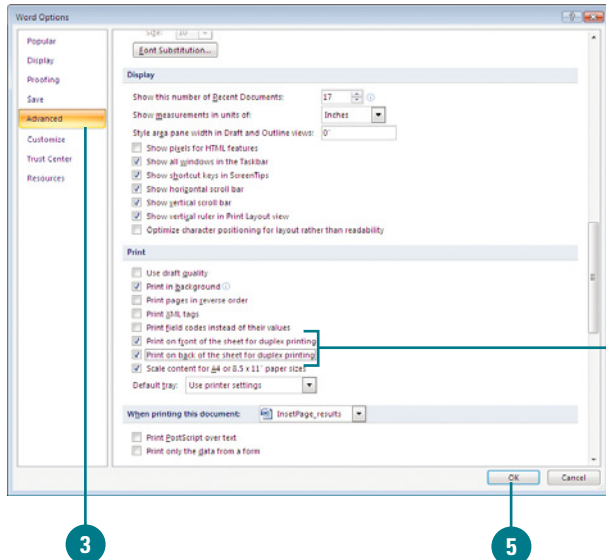
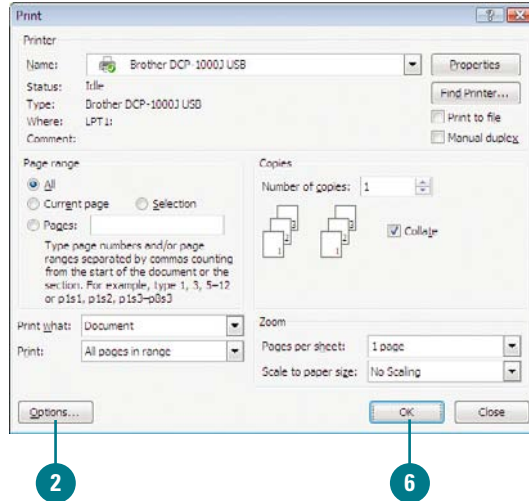
## Print a Two-Sided Document

- 1 Click the **Office** button, point to **Print**, and then click **Print**.
- 2 Click **Options**.
- 3 Click **Advanced**.
- 4 Select the **Print on front of the sheet for duplex printing** and the **Print on back of the sheet for duplex printing** check boxes.
- 5 Click **OK**.
- 6 Click **OK**.

### Did You Know?

*You can print two-sided documents manually.* The first side of each alternate page will be printed. Then you will be prompted to reinsert the pages into the printer so that the second side can be printed.

Two-sided printing is appropriate for bound reports, pamphlets, brochures and many other types of Word documents. Not all printers support automatic two-sided printing. If your printer does not support two-sided printing, you can use the Manual Duplex option in the Print dialog box to help you complete the process.



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# Publishing Documents on the Web

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# 12

## Introduction

Web pages are multimedia documents that provide information and contain links to other documents on the Internet, an intranet, a local network, or a hard disk. These links—also called hyperlinks—are highlighted text or graphics that you click to follow a pathway from one Web page to another. Incorporating hyperlinks within your documents adds an element of connectivity to your work. Web pages are based on **Hypertext Markup Language (HTML)**—a simple coding system used to format Web pages. A browser program, such as Microsoft Internet Explorer, interprets these special codes to determine how a certain Web page should be displayed. Different codes mark the size, color, style, and placement of text and graphics as well as which words and graphics should be marked as hyperlinks and to what files they link.

Web technology is available for all your Microsoft Office programs. Word provides you with the tools you need to create and save your documents as a Web page and to publish it on the Web. Word makes it easy to create a Web page without learning HTML. Saving your documents in HTML format means you can use most Web browsers to view them. By saving your documents as Web pages, you can share your data with others via the Internet. You can also preview how your document will look as a Web page in Word or in your browser. Word uses HTML as a companion file format; it recognizes the .html filename extension as accurately as it does those for Word.

## What You'll Do

**Open a Web Page**

**Preview a Web Page**

**Create Hyperlinks**

**Create a Hyperlink Between Frames**

**Use and Remove Hyperlinks**

**Save a Web Page**

**Change Web Page Options**

**Transfer Documents Over the Web**

**Create a Blog Posting on the Web**

**Manage Blog Accounts**

**Access Office Information on the Web**

## Opening a Web Page

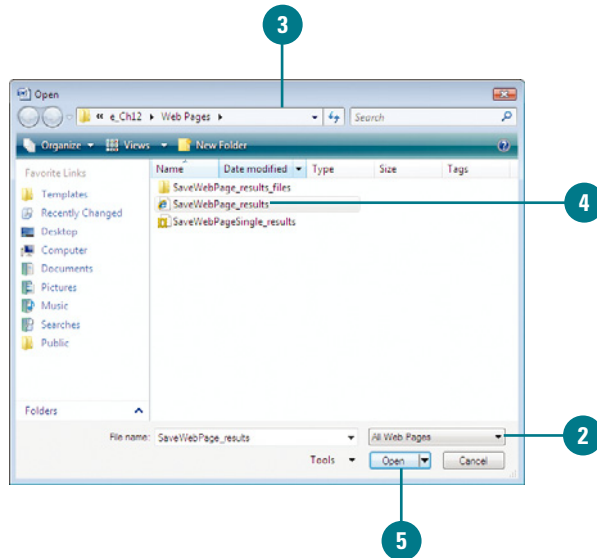
### Open a Document as a Web Page

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **Files of type** list arrow, and then click **All Web Pages**.
- 3 Click the **Look in** list arrow, and then select the folder where the file is located.
- 4 Click the Web file you want to open.
- 5 Click **Open**.

#### Did You Know?

*You can open Web pages in the background while you work.* Click the Office button, click Word Options, click Advanced in the left pane, select the Allow background open of web pages check box, and then click OK.

After saving a document as a Web page, you can open the Web page, an HTML file. This allows you to quickly and easily switch from HTML to the standard Word format and back again without losing any formatting or functionality. For example, if you create a formatted chart in a Word document, save the document file as a Web page, and then reopen the Web page in Word, the chart will look the same as the original chart in Word. Word preserves the original formatting and functionality of the document. You can also open a Web page from Word in your Web browser.



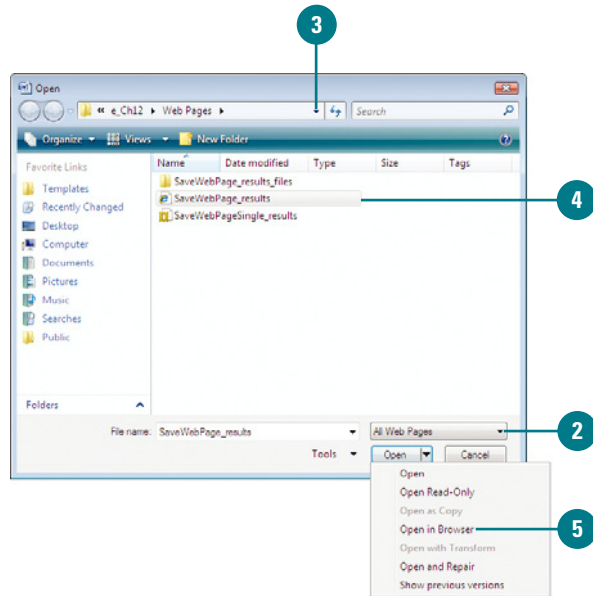
## Open a Document as a Web Page in a Browser

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **Files of type** list arrow, and then click **All Web Pages**.
- 3 Click the **Look in** list arrow, and then select the folder where the file is located.
- 4 Click the Web file you want to open.
- 5 Click the **Open** button arrow, and then click **Open in Browser**.

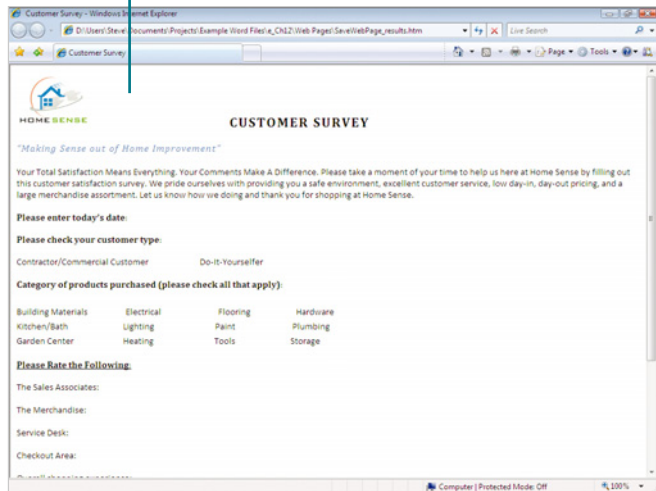
### Did You Know?

*You can change the appearance of Web pages and Help Viewer window.*

In the Internet Options dialog box for Windows, click Accessibility on the General tab, select the Ignore colors specified on Web pages check box, and then click OK. In the Internet Properties dialog box, click Colors to select text and background colors or Fonts to change text style.



### Document web page in a browser



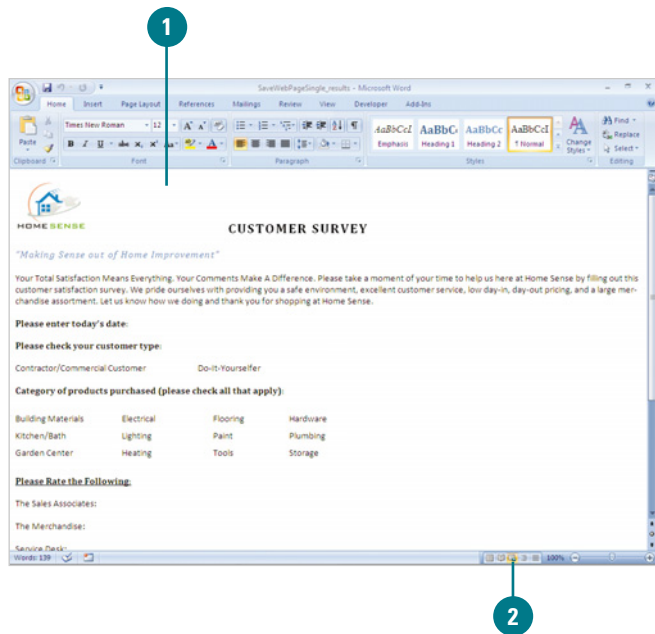
# Previewing a Web Page



You can view any document as if it were already on the Web by previewing the Web page. By previewing a file you want to post to the Web, you can see if there are any errors that need to be corrected, for-formatting that needs to be added, or additions that need to be made. Just as you should always preview a document before you print it, you should preview a Web page before you post it. Previewing the Web page is similar to using the Print Preview feature before you print a document. This view shows you what the page will look like once it's posted on the Internet. You do not have to be connected to the Internet to preview a document as a Web page. Web Layout view shows you how a document will be displayed on the Web. If the document includes formatting or layouts that cannot be achieved in HTML, Word switches to an HTML layout that closely matches the original look.

## Preview a Web Page in Word

- 1 Open the document you want to view as a Web page.
- 2 Click the **Web Layout View** button.

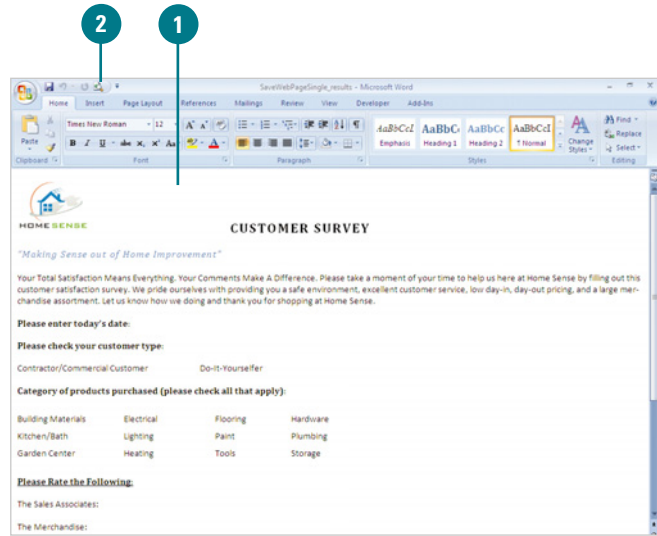


## View a Web Page from a Browser

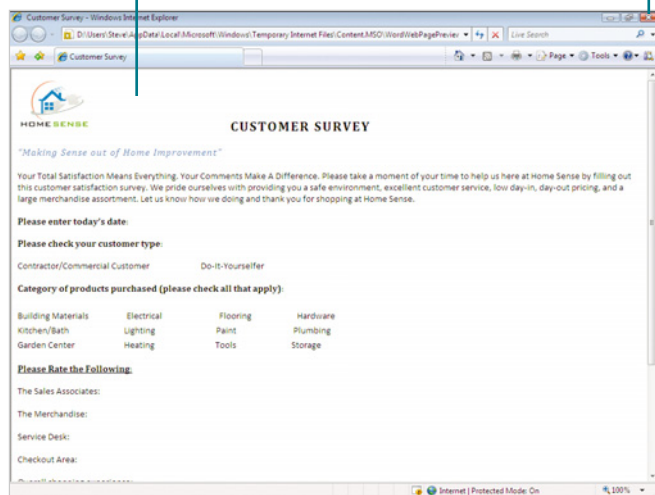
- 1 Open the document you want to view as a Web page.
  - 2 Click the **Web Page Preview** button on the Quick Access Toolbar.
    - ◆ The Web Page Preview button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- Your default Web browser starts and displays the Web page.
- 3 Click the **Close** button to quit your Web browser, and then return to Word.

### Did You Know?

**Web addresses and URLs mean the same thing.** Every Web page has a Uniform Resource Locator (URL), or Web address. Each URL contains specific parts that identify where a Web page is located. For example, the URL for Perspection's Web page is: <http://www.perspection.com/index.htm> where "http://" shows the address is on the Web, "www.perspection.com" shows the computer that stores the Web site, and "index.htm" is a Web page on the Web site.



### Document Web Page



# Creating Hyperlinks

Microsoft  
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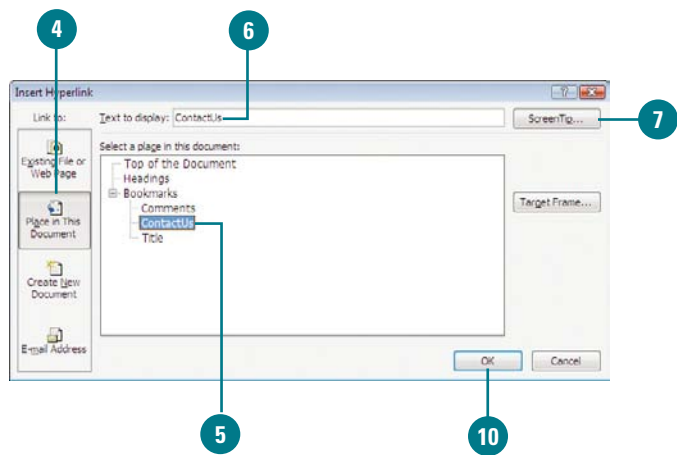
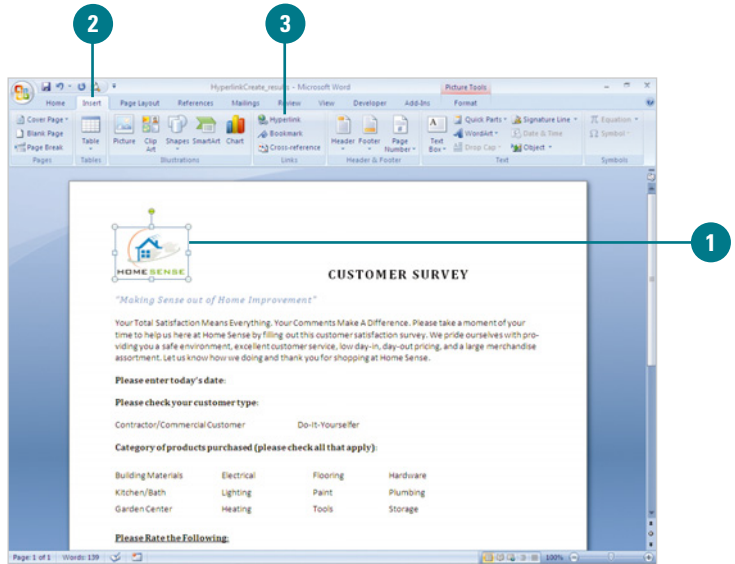
## Insert a Hyperlink Within a Document

- 1 Click where you want to insert the hyperlink, or select the text or object you want to use as the hyperlink.
- 2 Click the **Insert** tab.
- 3 Click the **Hyperlink** button.

**TIMESAVER** Press **Ctrl+K**.

- 4 Click **Place in This Document**.
- 5 Click a destination in the document.
- 6 Type the text you want to appear as the hyperlink.
- 7 Click **ScreenTip**.
- 8 Type the text you want to appear when someone points to the hyperlink.
- 9 Click **OK**.
- 10 Click **OK**.

With instant access to the Internet, your documents can contain links to specific sites so you and anyone else using your documents can access Web information. You can create a **hyperlink**—a graphic object or colored, underlined text that you click to move (or jump) to a new location (or destination). The destination can be in the same document, another file on your computer or network, or a Web page on your intranet or the Internet. When you point to hyperlinked text or an object, the cursor changes to a pointing hand to indicate it's a hyperlink.

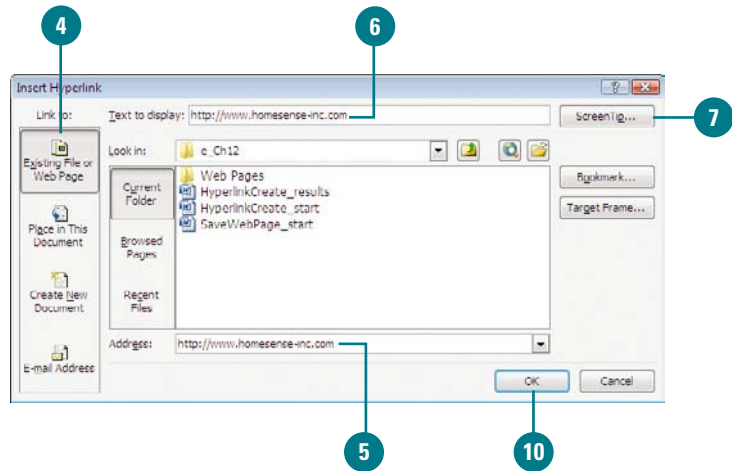
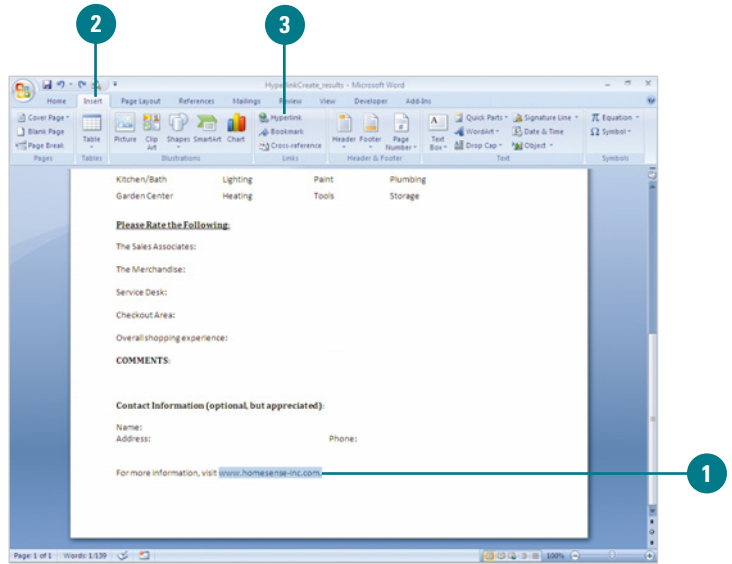


## Insert a Hyperlink Between Documents

- 1 Click where you want to insert the hyperlink, or select the text or object you want to use as the hyperlink.
- 2 Click the **Insert** tab.
- 3 Click the **Hyperlink** button.
- 4 Click **Existing File or Web Page**.
- 5 Enter the name and path of the destination file or Web page.
  - ◆ Or click the **Bookmark** button, select the bookmark, and then click **OK**.
- 6 Type the text you want to appear as the hyperlink.
- 7 Click **ScreenTip**.
- 8 Type the text you want to appear when someone points to the hyperlink.
- 9 Click **OK**.
- 10 Click **OK**.

### Did You Know?

**You can create a hyperlink to send e-mail messages.** Click where you want to insert the hyperlink, click the Hyperlink button on the Insert tab, click E-Mail Address, enter the recipient's e-mail address, enter a subject, enter the hyperlink display text, and then click OK.

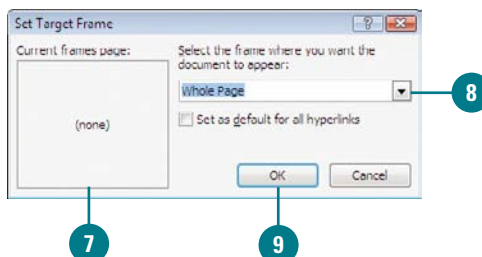
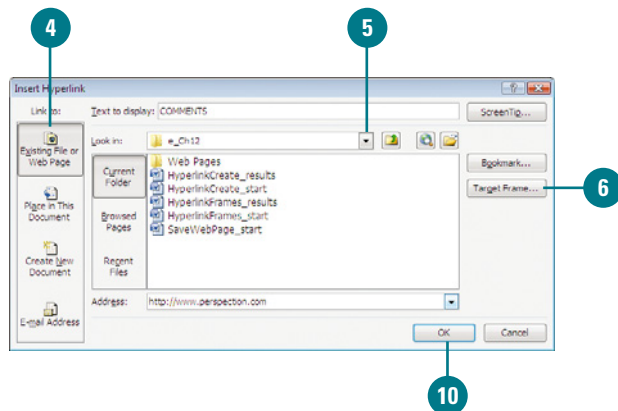
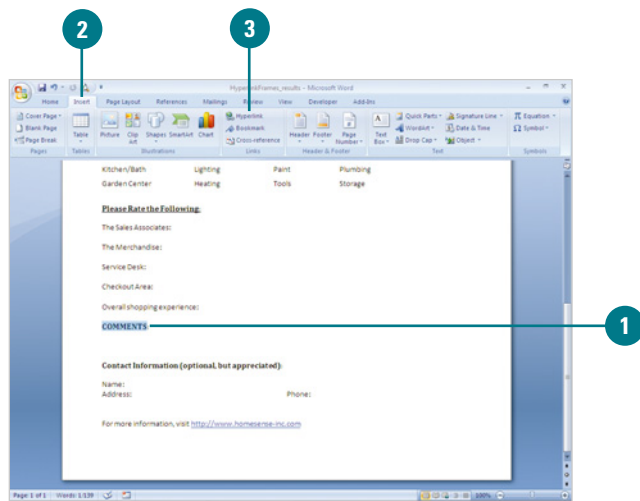


# Creating a Hyperlink Between Frames

## Create a Hyperlink Between Frames

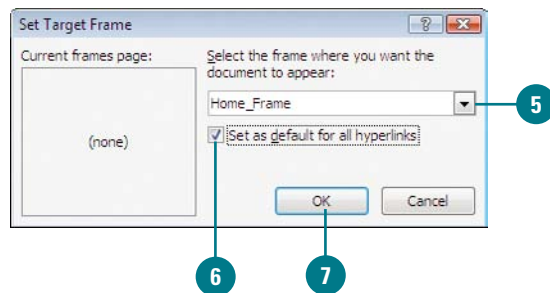
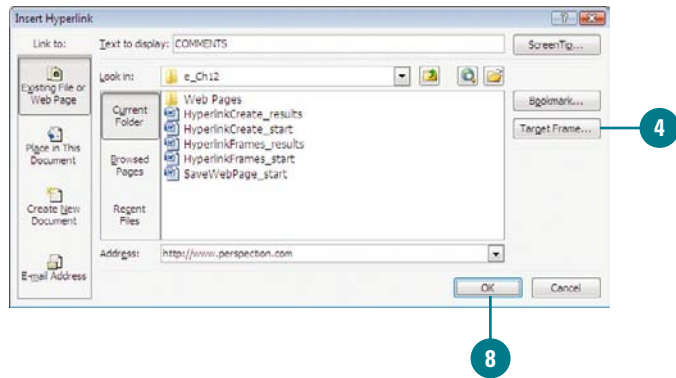
- 1 Select the text or picture you want to display as the hyperlink.
- 2 Click the **Insert** tab.
- 3 Click the **Hyperlink** button.
- 4 Click **Existing File or Web Page**.
- 5 Click the **Look in** list arrow, locate and select the file you want to use, or type the address you want to link to.
  - ◆ To link to a specific location in a document, click **Bookmark**, select the bookmark you want, and then click **OK**.
- 6 Click **Target Frame**.
- 7 Click the frame in the diagram where you want the destination of the hyperlink to display.
- 8 Click the list arrow, and then select the frame where you want the document to appear.
- 9 Click **OK**.
- 10 Click **OK**.

If you have a Web page document that contains frames, you can create a hyperlink between frames. A **frame** is a named Web page that appears in a window region on a Web page within a Web browser. You can have multiple frames on a Web page and each frame can have a border and be scrollable and resizable. You use the Target Frame button in the Insert Hyperlink dialog box to create a hyperlink between frames. If you continually create hyperlinks to the same target frame, you can set a default to save time in the future.



## Set the Default Target Frame for All Hyperlinks

- 1 Open the frames page you want to set as the default.
- 2 Click the **Insert** tab.
- 3 Click the **Hyperlink** button.
- 4 Click **Target Frame**.
- 5 Click the frame in the program in the diagram where you want the destination of the hyperlink.
- 6 Select the **Set as default for all hyperlinks** check box.
- 7 Click **OK**.
- 8 Click **OK**.



# Using and Removing Hyperlinks

## Use a Hyperlink

- 1 Position the mouse pointer over any hyperlink.
- 2 Press and hold Ctrl (which changes to a hand pointer), and then click the hyperlink.

Depending on the type of hyperlink, the screen:

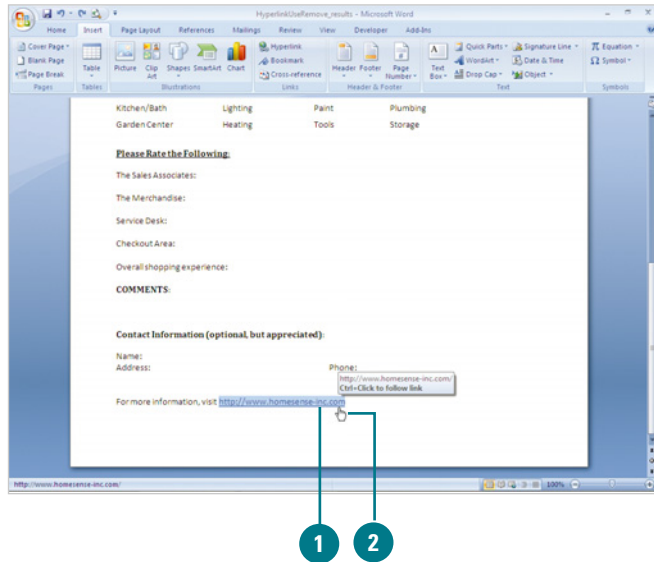
- ◆ Jumps to a new location within the same document.
- ◆ Jumps to a location on an intranet or Internet Web site.
- ◆ Opens a new file and the program in which it was created.
- ◆ Opens Outlook and displays a new e-mail message.

### Did You Know?

**You can edit a hyperlink.** Right-click the hyperlink, and then click Edit Hyperlink. Make the changes you want, and then click OK.

**You can copy or move a hyperlink.** Right-click the hyperlink you want to copy or move, click Copy or Cut. Right-click the cell you want to copy or move the hyperlink to, and then click Paste.

Hyperlinks connect you to information in other documents. Rather than duplicating the important information stored in other documents, you can create hyperlinks to the relevant material. When you click a hyperlink for the first time (during a session), the color of the hyperlink changes, indicating that you have accessed the hyperlink. If a link becomes outdated or unnecessary, you can easily revise or remove it. Word also repairs broken links. Whenever you save a document with hyperlinks, Word checks the links and repairs any that aren't working. For example, if a file was moved, Word updates the location.



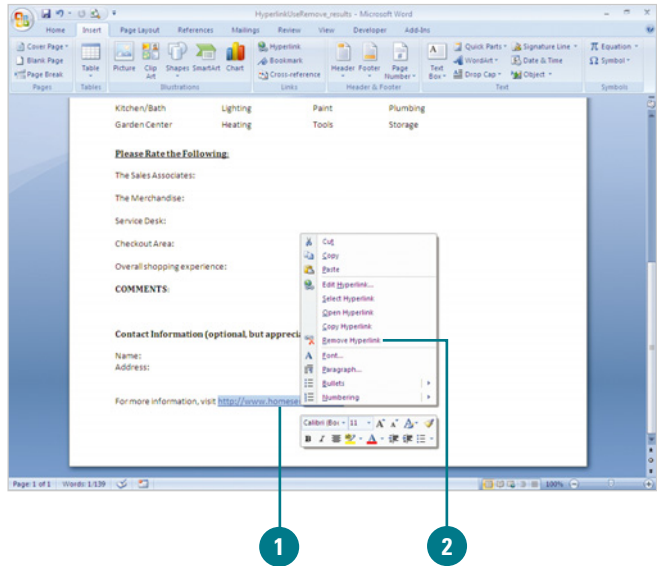
## Remove a Hyperlink

- 1 Right-click the cell containing the hyperlink you want to remove.
- 2 Click **Remove Hyperlink** to remove the hyperlink and keep the text.

### Did You Know?

**You can select a hyperlink without activating the link.** Click the cell that contains the hyperlink, hold down the mouse button until the pointer becomes a cross, and then release the mouse. If the hyperlink is a graphic, hold down Ctrl, and then click the graphic.

**You can create a custom ScreenTip for a hyperlink.** Select the hyperlink you want to customize, click the Insert tab, click the Hyperlink button, click ScreenTip, type the ScreenTip text you want, and then click OK twice.



# Saving a Web Page

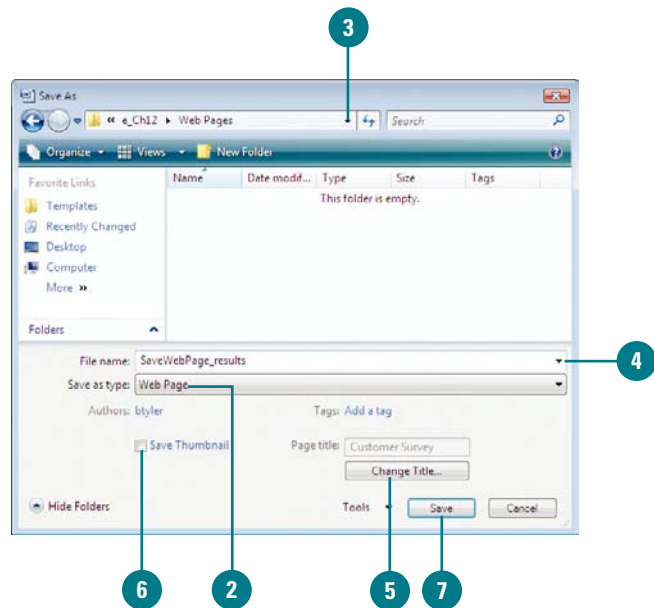
Microsoft  
Certified  
Application  
Specialist

WD07S-6.1.1

You can place an existing Office document on the Internet for others to use. In order for any document to be placed on the Web, it must be in HTML (Hypertext Markup Language) format—a simple coding system that specifies the formats a Web browser uses to display the document. This format enables you to post, or submit information and data on a Web site for others. You don't need any HTML knowledge to save a document as a Web page. When you save a document as a Web page, you can save it using the Web Page or Single File Web Page format. The Web Page format saves the document as an HTML file and a folder that stores supporting files, such as a file for each graphic, document, and so on. Word selects the appropriate graphic format for you based on the image's content. A single file Web page saves all the elements of a Web site, including text and graphics, into a single file in the MHTML format, which is supported by Internet Explorer 4.0.1 or later.

## Save a Document as a Web Page

- 1 Click the **Office** button, and then click **Save As**.
- 2 Click the **Save as type** list arrow, and then click **Web Page**.
- 3 Click the **Save in** list arrow, and then select a location for your Web page.
- 4 Type the name for the Web page.
- 5 To change the title of your Web page, click **Change Title**, type the new title in the Set Page Title box, and then click **OK**.
- 6 To save a thumbnail preview of the Web page, select the **Save Thumbnail** check box.
- 7 Click **Save**.
- 8 If necessary, click **Yes** to keep formatting.



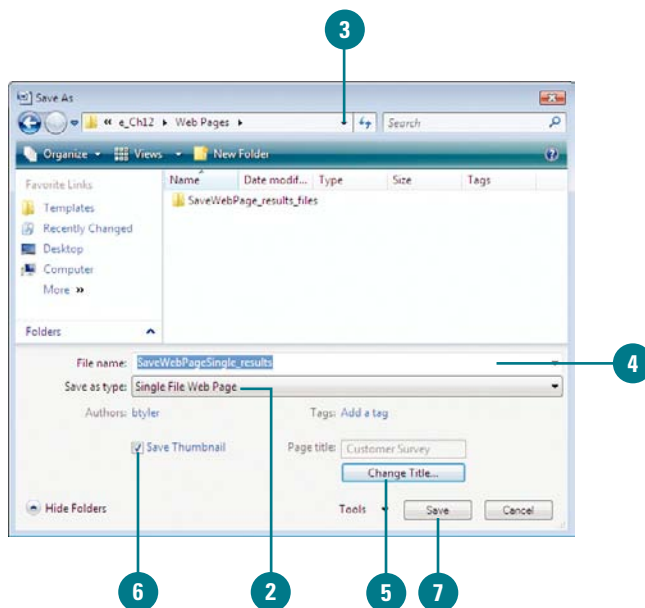
## Save a Document as a Single File Web Page

- 1 Click the **Office** button, and then click **Save As**.
- 2 Click the **Save as type** list arrow, and then click **Single File Web Page**.
- 3 Click the **Save in** list arrow, and then select a location for your Web page.
- 4 Type the name for the Web page.
- 5 To change the title of your Web page, click **Change Title**, type the new title in the Set Page Title box, and then click **OK**.
- 6 To save a thumbnail preview of the Web page, select the **Save Thumbnail** check box.
- 7 Click **Save**.
- 8 If necessary, click **Yes** to keep formatting.

The Web page is saved as a single file.

### Did You Know?

**You can reduce Web page size by filtering HTML in Word.** You can save Web pages in filtered HTML to reduce the file size. In Word, click the Office menu, point to Save As, click Other Formats, click the Save as file type list arrow, click Web Page, Filtered, and then click Save.

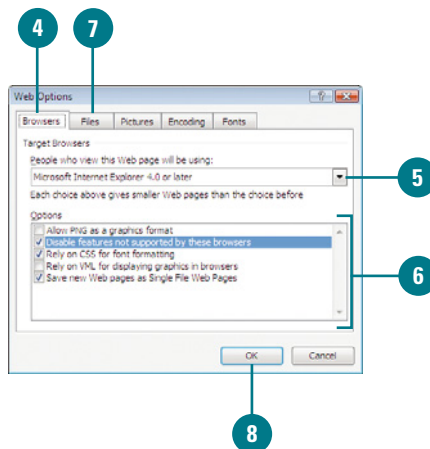
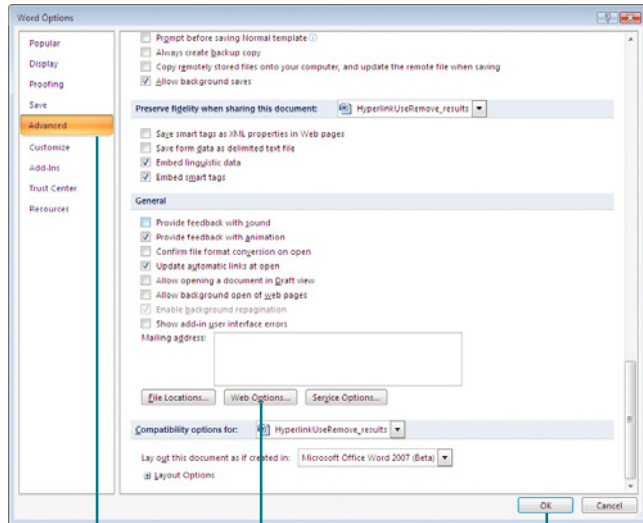


# Changing Web Page Options

## Change Web Page Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Click **Web Options**.
- 4 Click the **Browsers** tab.
- 5 Click the **Target Browsers** list arrow, and then select the version you want to support.
- 6 Select or clear the Web page options:
  - ◆ **Allow PNG as a graphic format.**
  - ◆ **Rely on CSS for font formatting.** Cascading Style Sheets for Web page formatting.
  - ◆ **Reply on VML for displaying graphics in browser.** VML is Vector Markup Language, XML based graphics.
  - ◆ **Save new Web pages as Single File Web Pages.**
- 7 Click the **Files** tab, and then select or clear the file related Web page options:
  - ◆ File names and locations.
  - ◆ Default editors.
- 8 Click **OK**.
- 9 Click **OK**.

When you save or publish a document as a Web page, you can change the appearance of the Web page by changing Office's Web options. You can set Web options to save any additional hidden data necessary to maintain formulas, allow PNG as a graphic format, rely on CSS for font formatting, rely on VML for displaying graphics in browser, and save new Web pages as Single File Web Pages. Web pages are saved using the appropriate international text encoding so users on any language system are able to view the correct characters.

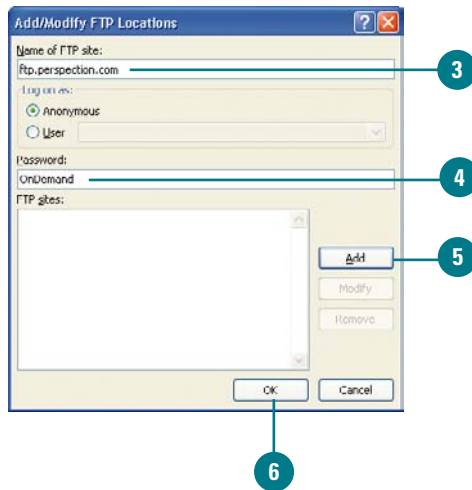


# Transferring Files Over the Web

## Add or Modify FTP Locations

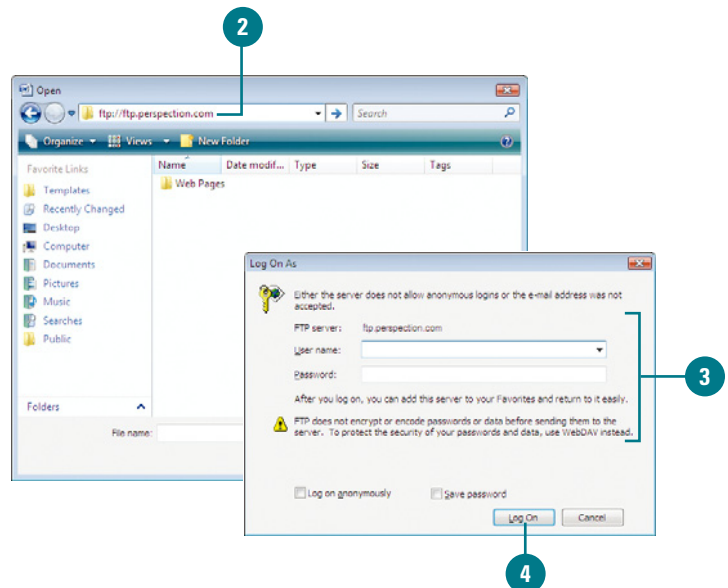
- 1 In Windows XP, click the **Office** button, and then click **Open**.
- 2 Click the **Look in** list arrow, and then click **Add/Modify FTP Locations**.
- 3 Type the complete address for an FTP site.
- 4 Type your e-mail address as the password.
- 5 Click **Add**.
- 6 Click **OK**.

**File Transfer Protocol (FTP)** is an inexpensive and efficient way to transfer files between your computer and others on the Internet. You can download or receive, from another computer, any kind of file, including text, graphics, sound, and video files. To download a file, you need an ID and password to identify who you are. Anonymous FTP sites are open to anyone; they usually use *anonymous* as an ID and your *e-mail address* as a password. You can also save the FTP site address to revisit the site later.



## Access an FTP Site

- 1 Click the **Office** button, and then click **Open**.
- 2 Perform the steps for your operating system:
  - ◆ **Windows XP.** Click the **Look in** list arrow, click **FTP Locations**, and then click the FTP site.
  - ◆ **Windows Vista.** Type the FTP site and press Enter in the Address bar.
- 3 Select a Log on as option, and then enter a password (your e-mail address or personal password).
- 4 Click **OK** or **Log On**.

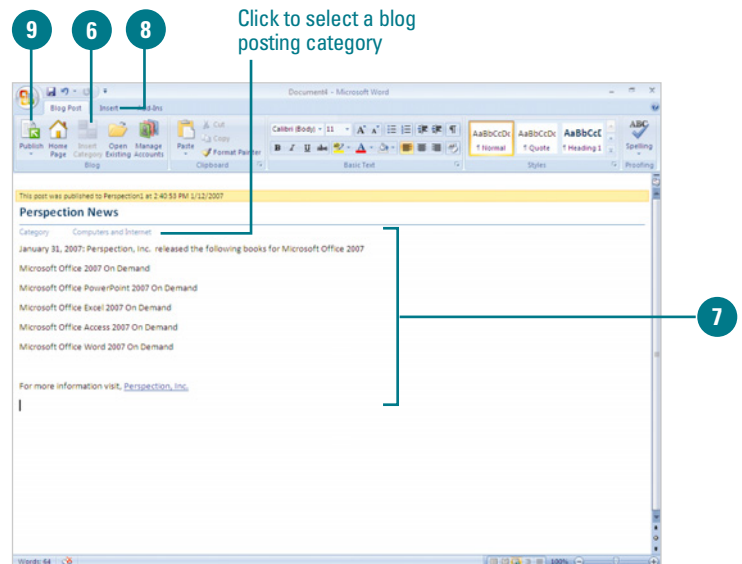
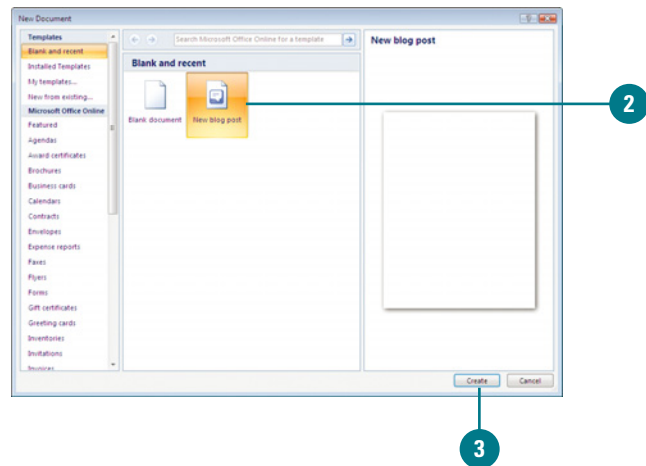


# Creating a Blog Posting on the Web

## Create a Blog Posting

- 1 Click the **Office** button, and then click **New**.
- 2 Click **Blank and recent**, and then click **New blog post**.
- 3 Click **Create**.
- 4 If you have not registered a blog account with Word, click **Register Now** or click **Register Later**.
- 5 Select the placeholder title, and then type a new title.
- 6 To insert a blog category, click the **Insert Category** button, and then select a category.
- 7 Type the blog message you want below it.
- 8 To insert visuals (including a Picture, SmartArt, Chart, or Hyperlink), click the **Insert** tab, and then use the buttons to insert other content.
- 9 To post the blog, click the **Publish** button arrow, and then click **Publish** or **Publish as Draft**.
- 10 When you're done, close and save the posting as a Word document.

A **blog** is a Web site that provides journal style information on a particular subject, such as news or a diary. Blog is short for Web log. However, you may have heard of other types: vlog (video) or podcasting (audio). A blog combines text, images, and links to other blogs, Web pages, and related topics. In Word 2007, you can create and publish blog postings (**New!**). Before you can publish a posting, you need to setup an account with a blog service provider and then register it with Word. Service providers include Windows Live Spaces, Blogger, and Microsoft Windows SharePoint Services with more coming online all the time. Most services are free, so everyone can create an account. Visit Windows Live Space at <http://spaces.live.com> or Blogger at <http://www.blogger.com> and follow the online instructions.

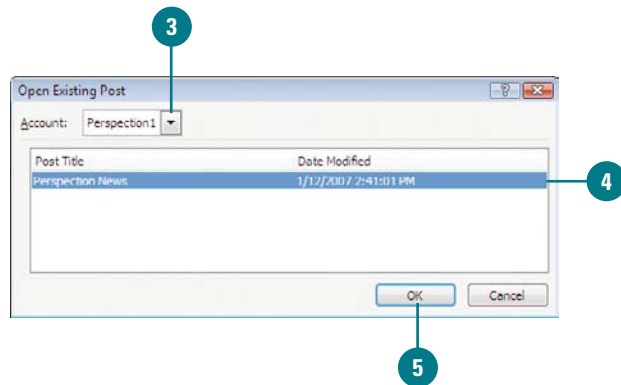
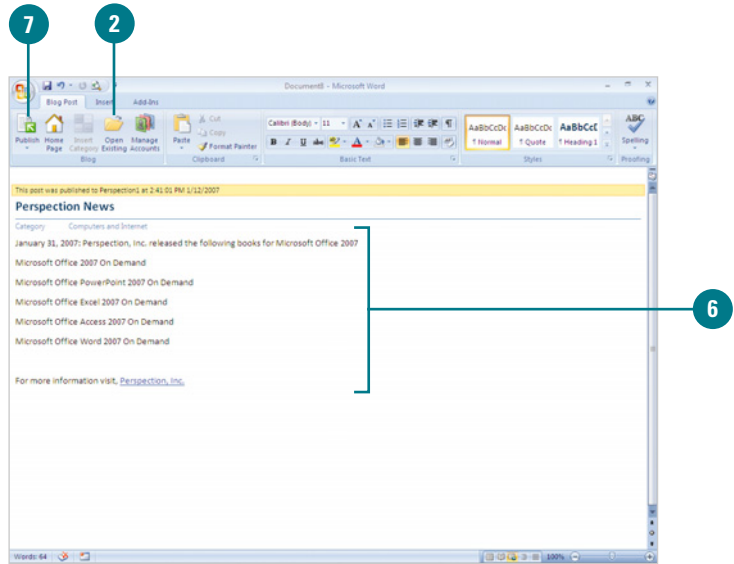


## Open an Existing Blog Posting and Republish

- 1 Open the document with the saved posting you want to open.
- 2 Click the **Open Existing** button, select the blog, and then click **OK**.
- 3 Select the account with the blog you want to open.
- 4 Select the blog posting you want to open.
- 5 Click **OK**.
- 6 Edit the blog posting text and insert any additional visuals you want.
- 7 When you're done, click the **Publish** button arrow, and then click **Publish** or **Publish as Draft**.
- 8 When you're done, close and save the posting as a Word document.

### Did You Know?

*You can create a new blog with the contents of the current document.* Open the document you want to use, click the Office button, point to Publish, and then click Blog.



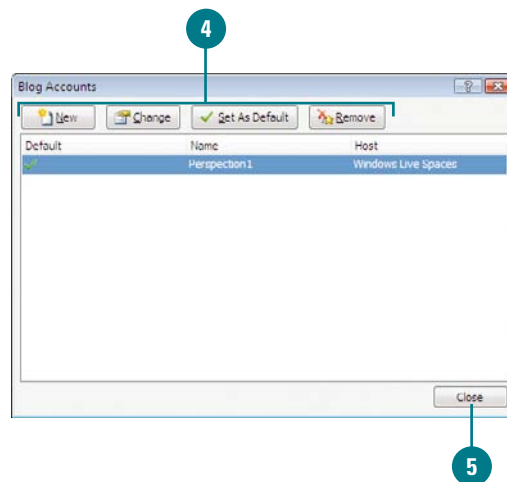
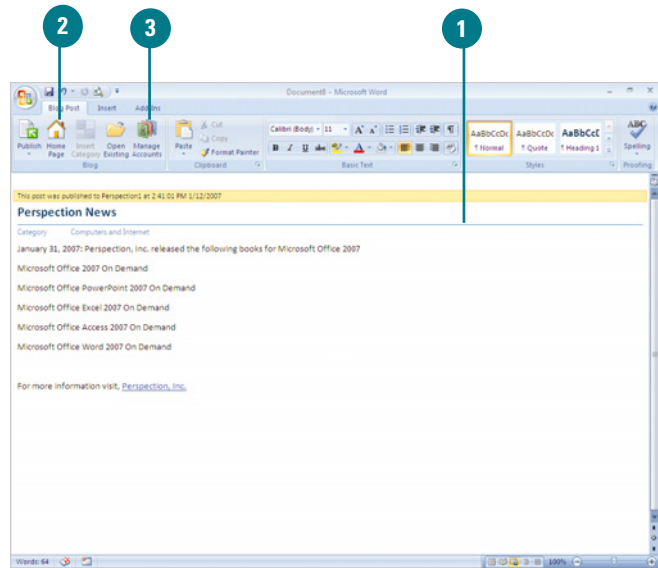
# Managing Blog Accounts



Before you can publish a posting, you need to setup an account with a blog service provider and then register it with Word, where you can manage them. If you have more than one blog account, you can register them all with Word and use the Blog Accounts dialog box (**New!**) to manage the accounts. You can register new accounts, change old accounts, set an account as the default, and remove accounts you no longer need. If you need to open your blog account, you can click the Home page button on the Blog Post tab in Word to view your account in a Web browser. Two common sites you can open include Windows Live Space at <http://spaces.live.com> or Blogger at <http://www.blogger.com>.

## Manage a Blog Account

- 1 Open a document with a saved posting or create a new blog posting.
- 2 To open your blog on the Web, click the **Home Page** button.
- 3 Click the **Manage Accounts** button.
- 4 Use any of the following buttons to manage your blog accounts:
  - ◆ **New.** Click to register an established blog account with Word.
  - ◆ **Change.** Click to change the registration information for the selected account.
  - ◆ **Set As Default.** Click to set the selected account as the default.
  - ◆ **Remove.** Click to remove the selected account.
- 5 Click **Close**.



# Accessing Office Information on the Web

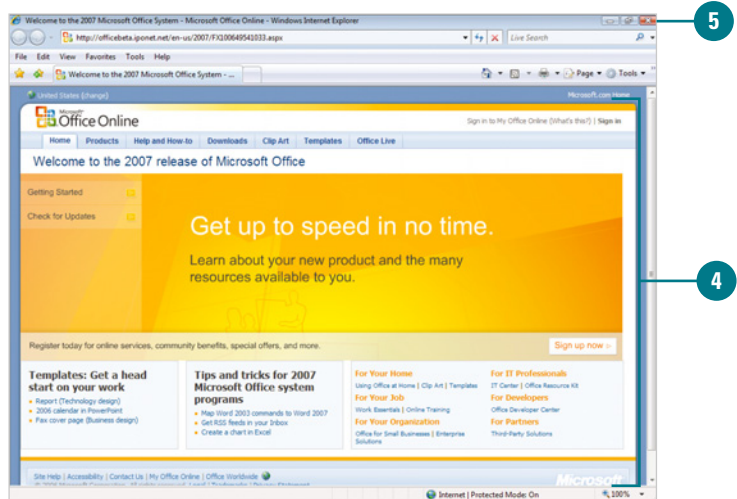
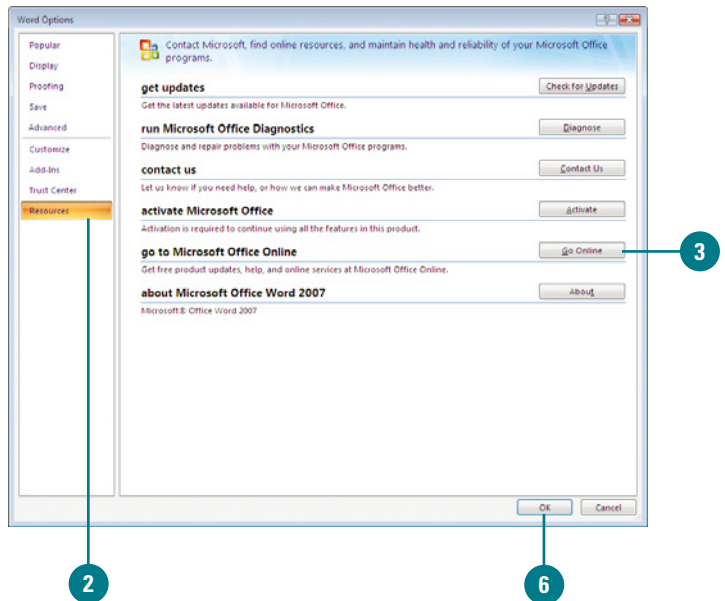
## Find Online Office Information

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Resources**.
- 3 Click **Go Online**.

Your Web browser opens, displaying the Microsoft Office Online Web page.

- 4 Click a hyperlink of interest.
- 5 Click the **Close** button to quit the browser and return to the Office program.
- 6 Click **OK**.

New information about programs comes out with great frequency. You have access to an abundance of information about Office programs and other programs in the Office Suite from Microsoft. This information is constantly being updated. Answers to frequently asked questions, user forums, and update offers are some of the types of information you can find about Microsoft Office. You can also find out about conferences, books, and other products that help you learn just how much you can do with your Microsoft Office software.



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# Protecting and Securing Documents

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## Introduction

When you've developed content in your document and want feedback, you can electronically send a document to reviewers so that they can read, revise, and comment on the document without having to print it. Instead of reading handwritten text or sticky notes on your printout, you can get clear and concise feedback.

Adding a password to protect your document is not only a good idea for security purposes, it's an added feature to make sure that changes to your document aren't made by unauthorized people. You can protect all or part of a document. In each case, you'll be asked to supply a password, and then enter it again when you want to work on the file. Not only can you guard who sees your document, you can set rights on who can add changes and comments to your document. You can also add restricted access known as Information Rights Access (IRM). IRM is a tool that is available with all Microsoft Office applications that restricts a file being sent through e-mail to other users. If you need to validate the authenticity of a document, you can add an invisible digital signature, an electronic secure stamp of authentication on a document, or a visible signature line. A signature line allows you to create a paperless signature process for documents, such as contracts.

The Trust Center (**New!**) is a place where you set security options and find the latest technology information as it relates to document privacy, safety, and security from Microsoft. The Trust Center allows you to set security and privacy settings and provides links to Microsoft privacy statements, a customer improvement program, and trustworthy computing practices.

## What You'll Do

### Inspect Documents

#### Add Security Encryption to a Document

#### Add Password Protection to a Document

#### Restrict Formatting and Editing

#### Restrict Document Access

#### Add a Digital Signature

#### Add a Signature Line

#### Avoid Harmful Attacks

#### Use the Trust Center

#### Select Trusted Publishers and Locations

#### Set Add-In, ActiveX, and Macro Security Options

#### Change Message Bar Security Options

#### Set Privacy Options

#### Work with Office Safe Modes

#### Mark a Document as Read-Only

# Inspecting Documents

Microsoft  
Certified  
Application  
Specialist

WD07S-6.1.2,  
WD07S-6.1.3

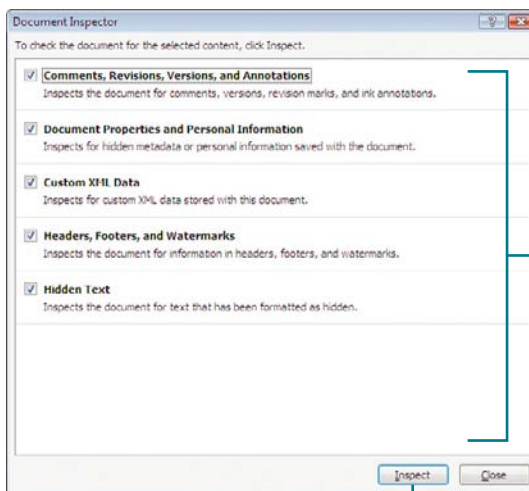
## Inspect a Document

- 1 Click the **Office** button, click **Save As**, type a name to save a copy of the original, specify a folder location, and then click **Save**.
- 2 Click the **Office** button, point to **Prepare**, and then click **Inspect Document**.
- 3 Select the check boxes with the content you want to find and remove:
  - ◆ **Comments, Revisions, Versions, and Annotations.** Includes comments, versions, revision marks, and ink annotations.
  - ◆ **Document Properties and Personal Information.** Includes metadata document properties (Summary, Statistics, and Custom tabs), the file path for publishing Web pages, document server properties, and content type information.

### Did You Know?

**What is metadata?** Metadata is data that describes other data. For example, text in a document is data, while the number of worksheets is metadata.

While you work on your document, Word automatically saves and manages personal information and hidden data to enable you to create and develop a document with other people. The personal information and hidden data includes comments, revision marks, versions, ink annotations, document properties, invisible content, header and footer information, hidden text, document server properties, and custom XML data. The **Document Inspector (New!)** uses inspector modules to find and remove any hidden data and personal information specific to each of these modules that you might not want to share with others. If you remove hidden content from your document, you might not be able to restore it by using the Undo command, so it's important to make a copy of your document before you remove any information.



- ◆ **Custom XML Data.** Includes any custom XML data.
- ◆ **Headers, Footers, and Watermarks.** Includes information in headers, footers, and watermarks.
- ◆ **Hidden Text.** Includes information formatted as hidden text.

4 Click **Inspect**.

A progress meter appears while Word inspects the document.

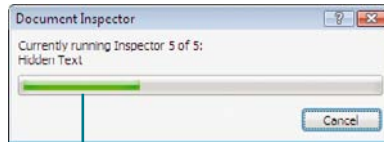
5 Review the results of the inspection.

6 Click **Remove All** for each inspector module in which you want to remove hidden data and personal information.

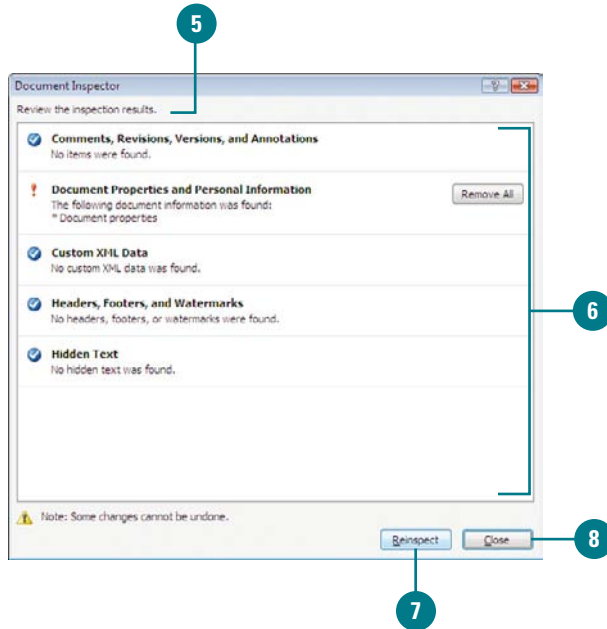
**TROUBLE?** Before you click *Remove All*, be sure you want to remove the information. You might not be able to restore it.

7 To reinspect the document, click **Reinspect**, and then click **Inspect**.

8 Click **Close**.



Inspector progress



# Adding Security Encryption to a Document

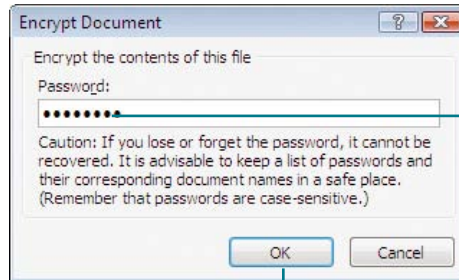
Microsoft  
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Application  
Specialist

WD07S-6.2.4

## Apply File Encryption

- 1 Click the **Office** button, point to **Prepare**, and then click **Encrypt Document**.
- 2 Type a password.
- 3 Click **OK**.
- 4 Retype the password.
- 5 Click **OK**.

File encryption is additional security you can apply to a document. **File encryption** scrambles your password to protect your document from unauthorized people from breaking into the file. You don't have to worry about the encryption, Word handles everything. All you need to do is remember the password. If you forget it, you can't open the file. Password protection takes effect the next time you open the document. To set password protection using file encryption, select the Office button, point to Prepare, select Encrypt Document, enter a password, write it down for safekeeping, and then reenter the password again. Password protection takes effect the next time you open the document.



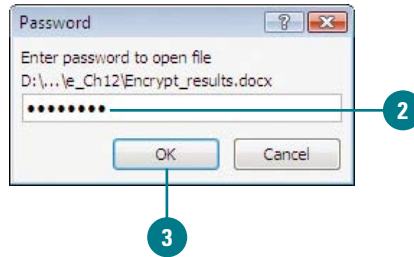
## For Your Information

### Using a Strong Password

Hackers identify passwords as strong or weak. A strong password is a combination of uppercase and lowercase letters, numbers, and symbols, such as Grea8t!, while a weak one doesn't use different character types, such as Hannah1. Be sure to write down your passwords and place them in a secure location.

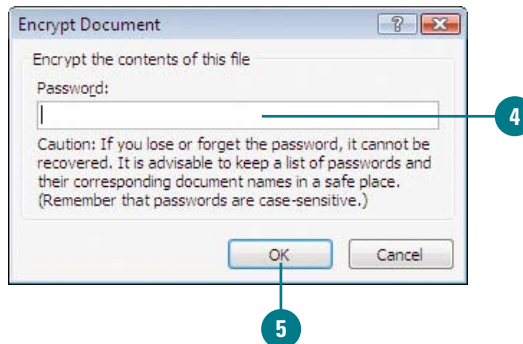
## Open File with Encryption

- 1 Click the **Office** button, click **Open**, navigate to a document with the password encryption, and then click **Open**.
- 2 Type the password.
- 3 Click **OK**.



## Remove File Encryption

- 1 Click the **Office** button, click **Open**, navigate to a document with the password encryption, and then click **Open**.
- 2 Type the password, and then click **OK**.
- 3 Click the **Office** button, point to **Prepare**, and then click **Encrypt Document**.
- 4 Delete the file encryption password.
- 5 Click **OK**.



# Adding Password Protection to a Document

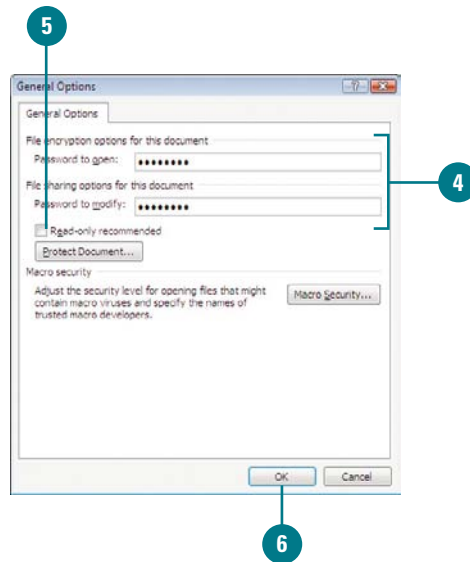
Microsoft  
Certified  
Application  
Specialist

WD07S-6.2.3

## Add Password Protection to an Office Document

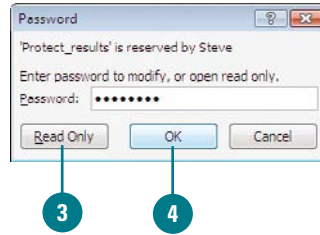
- 1 Open the document you want to protect.
- 2 Click the **Office** button, and then click **Save As**.
- 3 Click **Tools**, and then click **General Options**.
- 4 Type a password in the Password to open box or the Password to modify box.  
**IMPORTANT** *It's critical that you remember your password. If you forget your password, Microsoft can't retrieve it.*
- 5 Select or clear the **Read-only recommended** check box.
- 6 Click **OK**.
- 7 Type your password again.
- 8 Click **OK**.
- 9 If you entered passwords for Open and Modify, type your password again, and then click **OK**.
- 10 Click **Save**, and then click **Yes** to replace existing document.

You can assign a password and other security options so that only those who know the password can open the document, or to protect the integrity of your document as it moves from person to person. At times, you will want the information to be used but not changed; at other times, you will want only specific people to be able to view the document. Setting a document as read-only is useful when you want a document, such as a company-wide bulletin, to be distributed and read, but not changed. You can set password protection for read-only or to modify the document. Password protection takes effect the next time you open the document.



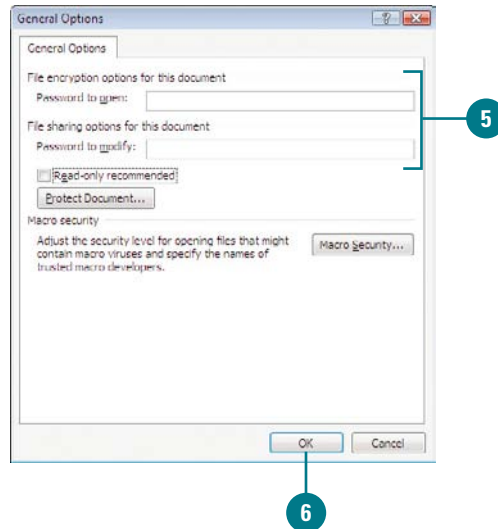
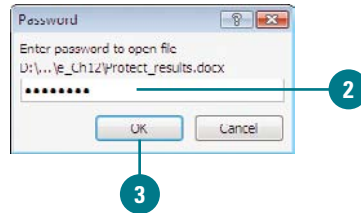
## Open a Document with Password Protection

- 1 Click the **Office** button, click **Open**, navigate to the protected document, and then click **Open**.
- 2 If prompted, type a password to open the document, and then click **OK**.
- 3 Click **Read Only** if you do not wish to modify the document, or type the password in the Password dialog box.
- 4 Click **OK**.



## Change or Remove the Password Protection

- 1 Click the **Office** button, click **Open**, navigate to the protected, and then click **Open**.
- 2 Type the password in the Password dialog box.
- 3 Click **OK**. If prompted, type the another password, and then click **OK**.
- 4 Click the **Office** button, click **Save As**, click **Tools**, and then click **General Options**.
- 5 Select the contents in the Password to open box or the Password to modify box, and then choose the option you want:
  - ◆ **Change password.** Type a new password, click **OK**, and then retype your password.
  - ◆ **Delete password.** Press Delete.
- 6 Click **OK**.
- 7 Click **Save**, and then click **Yes** to replace existing document.

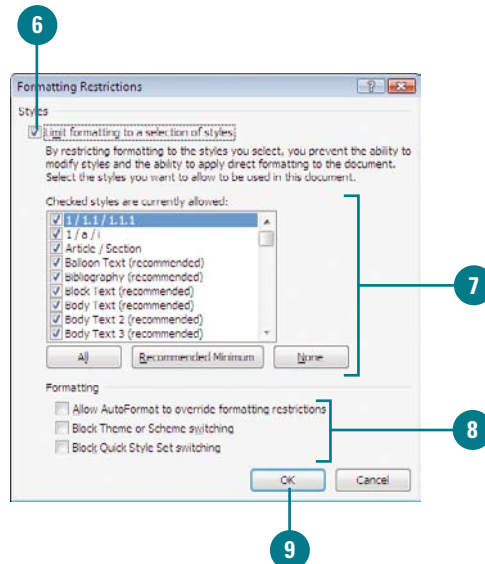
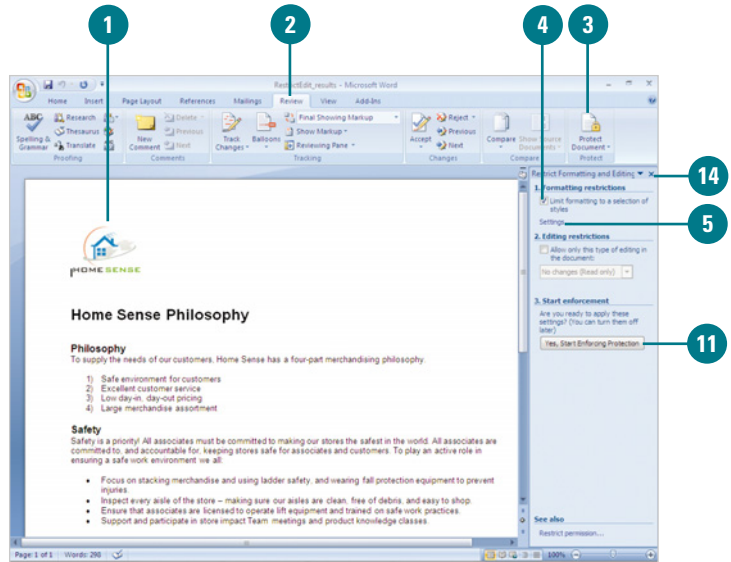


# Restricting Formatting and Editing

## Restrict Formatting Changes

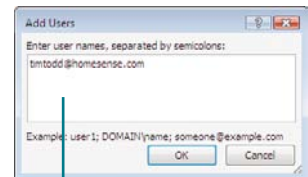
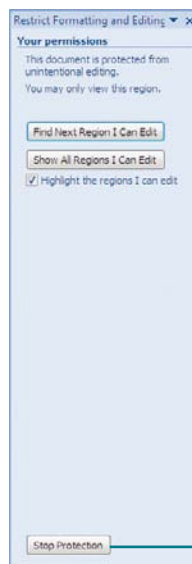
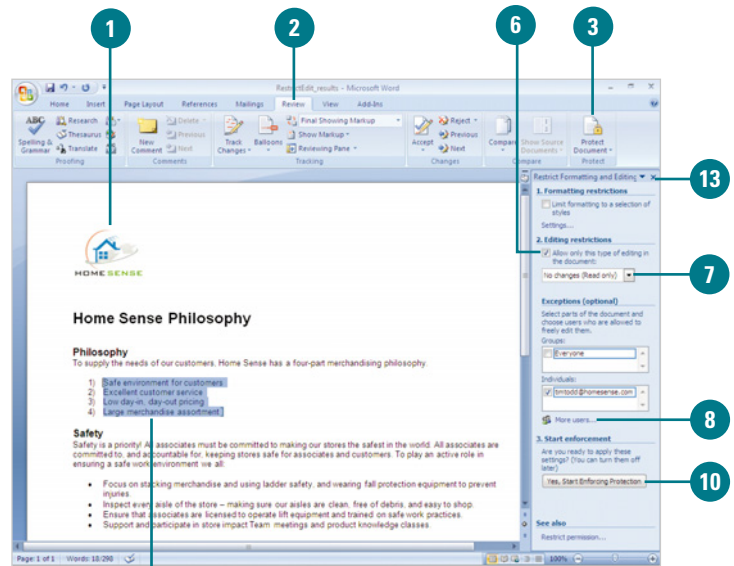
- 1 Open the document you want to protect.
- 2 Click the **Review** tab.
- 3 Click the **Protect Document** button, and then click **Restrict Formatting and Editing**.
- 4 Select the **Limit formatting to a selection of styles** check box.
- 5 Click **Settings**.
- 6 If necessary, select the **Limit formatting to a selection of styles** check box.
- 7 Select the check boxes next to the styles you want to allow in the document. To provide a standard minimum amount of restriction, click **Recommended Minimum**.
- 8 To allow AutoFormat, block theme or color scheme switching, or block Quick Style Set switching, select the check boxes.
- 9 Click **OK**.
- 10 If a message alert appears, click **Yes** to remove styles, or click **No** to keep the formatting.
- 11 Click **Yes, Start Enforcing Protection**.
- 12 To assign a password, type a password, and then reenter it.
- 13 Click **OK**.
- 14 Click the **Close** button on the task pane.

If you want to protect parts of a document, yet grant permission for specific users to change other parts of the document, you can set restriction and protection options in the Restrict Formatting and Editing task pane (**New!**). If you only want to prevent users from formatting a document, you can also restrict users from making any formatting changes or limit formatting to a selection of styles.



## Allow Changes to Part of a Protected Document

- 1 Open the document you want to protect.
- 2 Click the **Review** tab.
- 3 Click the **Protect Document** button, and then click **Restrict Formatting and Editing**.
- 4 If the document is already protected, click **Stop Protection**.
- 5 If you assigned a password to help protect the document, type the password.
- 6 Select the **Allow only this type of editing in the document** check box.
- 7 Click the list arrow, and then select an editing protection option: **Tracked changes, Comments, Filling in forms, No changes (Read only)**.
- 8 To add specific user, click **More users**, enter names as shown in the example (separated by semicolons), and then click **OK**.
- 9 Select the parts of the document you want to be unrestricted, and the check box next to the user you want to be able to edit it.
- 10 Click **Yes, Start Enforcing Protection**.
- 11 Click the **Password** option, type a password and reenter it, or click the **User authentication** option, which encrypts the document and enables Information Right Management (IRM).
- 12 Click **OK**.
- 13 Click the **Close** button on the task pane.



# Restricting Document Access

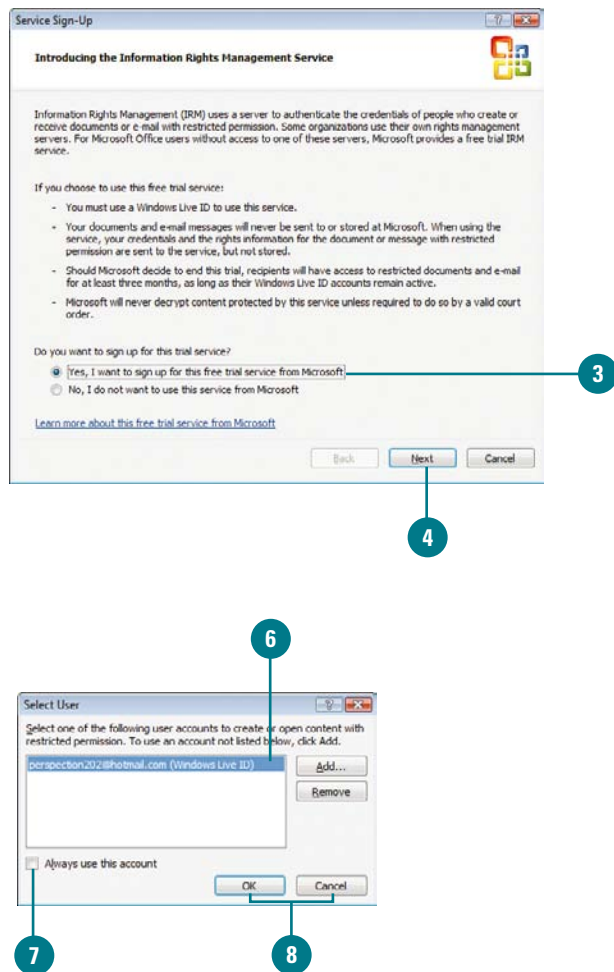
Microsoft  
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WD07S-6.2.1

## Set Up Information Rights Management

- 1 Click the **Office** button, point to **Prepare**, point to **Restrict Permission**, and then click **Manage Credentials**.
- 2 Click **Yes** to download and install IRM. Follow the wizard instructions to install IRM software.  
  
Upon completion, the Service Sign-Up Wizard opens.
- 3 Click the **Yes, I want to sign up for this free trial service from Microsoft** option.
- 4 Click **Next**, and then follow the remaining instructions to create a .NET Passport and complete the service sign-up. You'll need to select a certificate type, either Standard or Temporary.
- 5 Click **Finish**.
- 6 Select a user account with the credentials you want to use.
- 7 Select or clear the **Always use this account** check box.
- 8 Click **OK** or **Cancel** to restrict permission.

**Information Rights Management (IRM)** in Office 2007 programs provides restricted access to Office documents. You can use IRM to restrict permission to content in documents from being forwarded, printed, copied, faxed, or edited by unauthorized people. You can also enforce corporate policies and set file expirations. IRM uses a server to authenticate the credentials of people who create or receive documents or e-mail with restricted permission. For Microsoft Office users without access to one of these servers, Microsoft provides a free trial IRM service, which requires a .NET Passport. If you want to view or change the permissions for a document, click **Change Permission** in the Message Bar or click the IRM icon button in the Status bar (**New!**). If someone tries to access a restricted document, a message appears with the author's address or Web site address so the individual can request permission.



## Create a Document with Restricted Permission

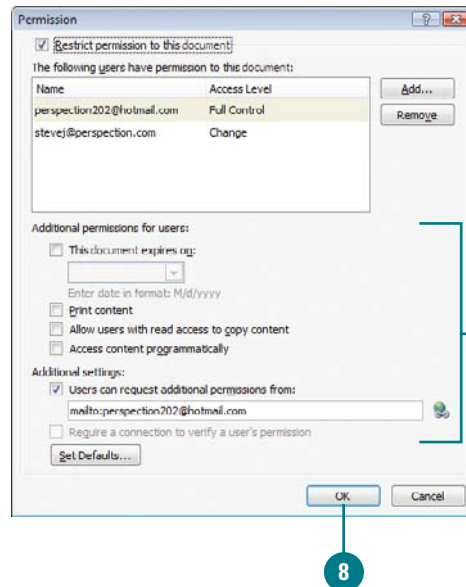
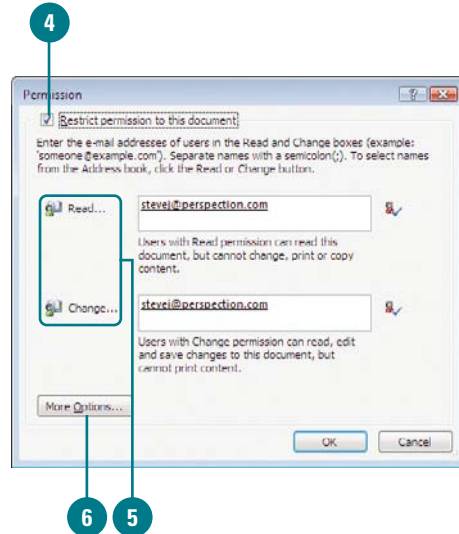
- 1 Open the document you want to restrict permission.
- 2 Click the **Office** button, point to **Prepare**, point to **Restrict Permission**, and then click **Restrict Access**.
- 3 If necessary, click the user with the permissions to create or open restricted content, and then click **OK**. If expired, click **OK**, and then click **Add** to renew it.
- 4 Select the **Restrict permission to this document** check box.
- 5 Enter e-mail addresses or click the **Read** or **Change** button to select users from your Address Book.
- 6 Click **More Options**.
- 7 Select the check boxes with the specific permissions you want.
- 8 Click **OK**, and then click **OK** again, if needed.

The Message Bar appears with the current rights management, along with a **Change Permission** button, which you can use to change document permissions.

### Did You Know?

**You can unrestrict access to a document.** Click the Office button, point to Prepare, point to Restrict Permission, and then click Unrestricted Access.

**You can change permission.** Click Change Permission in the Message Bar, or click the IRM icon on the Status bar.



# Adding a Digital Signature

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Application  
Specialist

WD07S-6.3.1

## Create an Digital ID

- 1 Click the **Office** button, point to **Prepare**, and then click **Add a Digital Signature**.
- 2 If an alert message appears, click **Signature Services from the Office Marketplace** to open an informational Web site where you can sign up for a digital certificate, or click **OK** to create your own.
- 3 If necessary, click **OK** and verify your Rights Management account credentials using your .NET password.
- 4 If you don't have a digital ID, click the option to get an ID from a Microsoft Partner or create your own, and then click **OK**.
- 5 Enter your name, e-mail address, organization name, and location.
- 6 Click **Create**.

You can sign a document, or click **Cancel**.

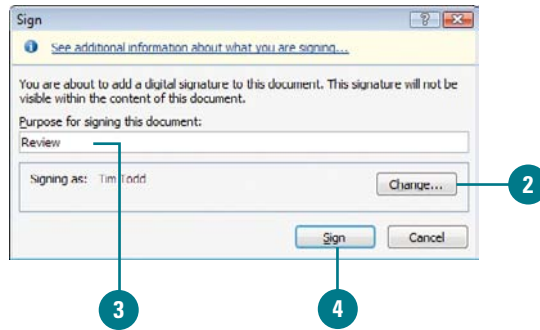
After you've finished a document, you might consider adding an invisible digital signature—an electronic, secure stamp of authentication on a document. Before you can add a digital signature, you need to get a **digital ID**, or **digital certificate**, which provides an electronic way to prove your identity. A digital certificate checks a public key to validate a private key associated with a digital signature. To assure a digital signature is authentic, it must have a valid (non expired or revoked) certificate issued by a reputable certification authority (CA), and the signing person must be from a trusted publisher. If you need a verified authentic digital certificate, you can obtain one from a trusted Microsoft partner CA. If you don't need a verified digital certificate, you can create one of your own. If someone modifies the file, the digital signature is removed and revoked. If you're not sure if a document is digitally signed, you can use the Signatures task pane to view or remove valid signatures.



6

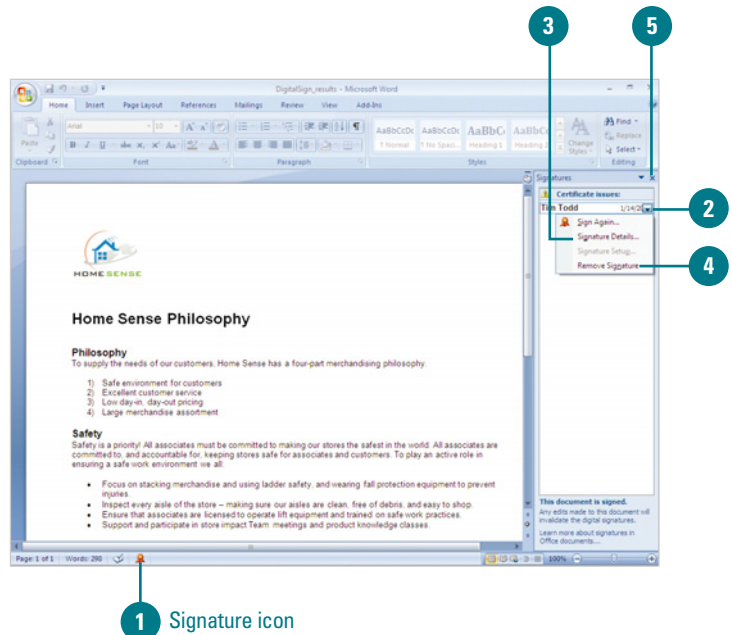
## Add a Digital Signature to a Document

- 1 Click the **Office** button, point to **Prepare**, and then click **Add a Digital Signature**.
- 2 To change the digital signature, click **Change**, select the one you want, and then click **OK**.
- 3 Enter the purpose for signing this document.
- 4 Click **Sign**.
- 5 If necessary, click **OK**.



## View or Remove Signatures

- 1 Click the **Signature** icon on the Status bar.
- The Signatures task pane appears, displaying valid signatures in the document. Invalid signatures are no longer automatically removed (**New!**).
- 2 Point to a signature, and then click the list arrow.
  - 3 To see signature details, click **Signature Details**, select a signature, click **View**, click **OK** when you're done, and then click **Close**.
  - 4 To remove a signature, point to a signature, click the list arrow, click **Remove Signature**, click **Yes**, and then if necessary click **OK**.
  - 5 Click the **Close** button on the task pane.



# Adding a Signature Line

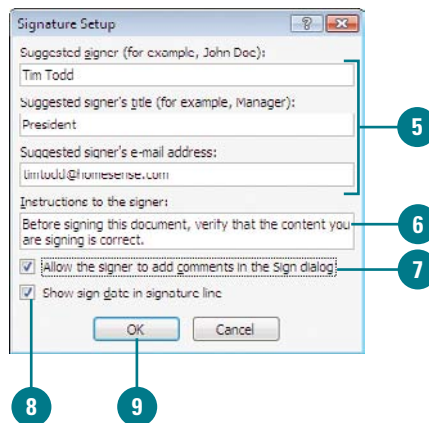
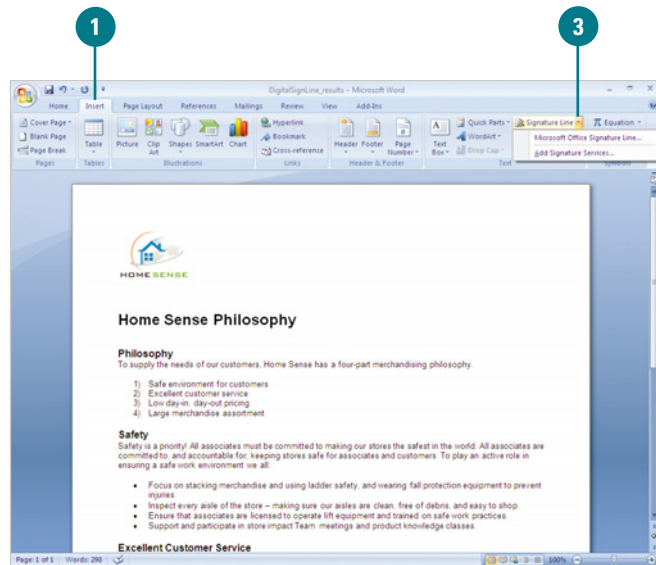
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WD07S-6.3.2

## Add a Signature Line

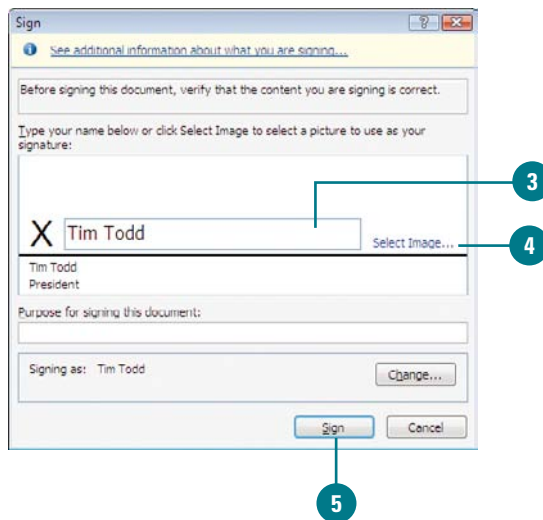
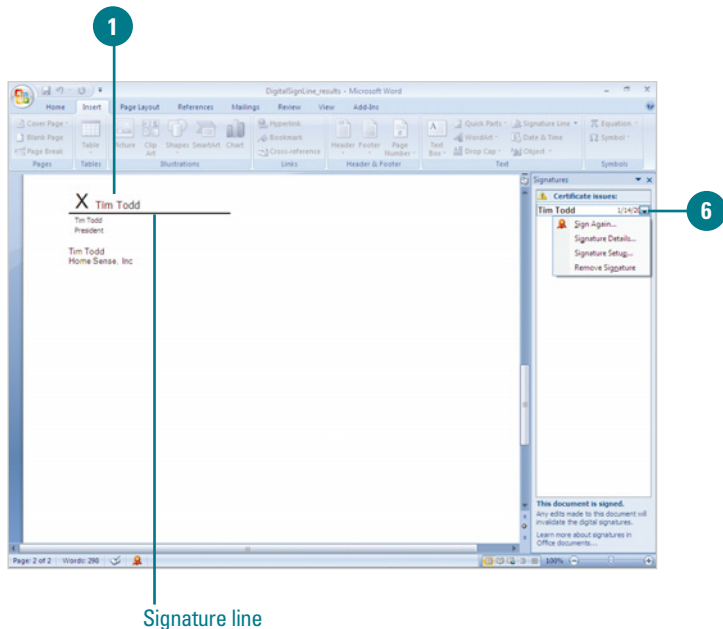
- 1 Click the **Insert** tab.
- 2 Click to place the insertion point where you want to insert a signature line.
- 3 Click the **Signature Line** button arrow, and then click **Microsoft Office Signature Line**.
- 4 If an alert message appears, click **Signature Services from the Office Marketplace** to open an informational Web site where you can sign up for a digital certificate, or click **OK** to create your own.
- 5 Type information about the person who will be signing on this signature line.
- 6 If you want, type any instructions for the signer.
- 7 To show the signature date, select the **Allow the signer to add comments in the Sign dialog box** check box.
- 8 To show the signature date, select the **Show sign data in signature line** check box.
- 9 Click **OK**.

If you prefer a visible signature line instead of an invisible digital signature, you can insert a visible signature line (**New!**) along with a digital certificate of authenticity. Signature lines allow you to create a paperless signature process for documents, such as contracts. A visible signature line looks like a typical signature line with a name, a date and a line for a signature. When you send a document out with a signature request, the signer sees a signature line and a notification request with instructions. The signer can type—or ink with a Tablet PC—a signature next to the X, or select a signature image. To add a signature line and digital signature at the same time, first you insert a signature line into your document, and then you sign it.



## Sign the Signature Line

- 1 Double-click the signature line that needs a signature.
  - 2 If an alert message appears, click **OK**.
  - 3 To add a printed version of your signature, type your name.
  - 4 If you have a Tablet PC, you can sign your name.
  - 5 To select an image of your written signature, click **Select Image**, navigate to the signature image, and then click **Select**.
  - 6 Click **Sign**.
- To make changes to the signature, point to the signature, click the list arrow, and then select the command you want.



# Avoiding Harmful Attacks

## Spreading Harmful Viruses

Many viruses and other harmful attacks spread through file downloads, attachments in e-mail messages, and data files that have macros, ActiveX controls, add-ins, or Visual Basic for Applications (VBA) code attached to them. Virus writers capitalize on people's curiosity and willingness to accept files from people they know or work with, in order to transmit malicious files disguised as or attached to benign files. When you start downloading files to your computer, you must be aware of the potential for catching a computer virus, worm, or Trojan Horse. Typically, you can't catch one from just reading a mail message or downloading a file, but you can catch one from installing, opening, or running an infected program or attached code.

## Understanding Harmful Attacks

**Phishing** is a scam that tries to steal your identity by sending deceptive e-mail asking you for bank and credit card information online. Phishers spoof the domain names of banks and other companies in order to deceive consumers into thinking that they are visiting a familiar Web site.

Phishers create a Web address that looks like a familiar Web address but is actually altered. This is known as a **homograph**. The domain name is created using alphabet characters from different languages, not just English. For example, the Web site address "www.microsoft.com" looks legitimate, but what you can't see is that the "i" is a Cyrillic character from the Russian alphabet.

Don't be fooled by spoofed Web sites that look like the official site. Never respond to requests for personal information via e-mail; most companies have policies that do not ask

for your personal information through e-mail. If you get a suspicious e-mail, call the institution to investigate and report it.

**Spam** is unsolicited e-mail, which is often annoying and time-consuming to get rid of. Spammers harvest e-mail addresses from Web pages and unsolicited e-mail. To avoid spam, use multiple e-mail addresses (one for Web forms and another for private e-mail), opt-out and remove yourself from e-mail lists. See the Microsoft Windows and Microsoft Office Help system for specific details.

**Spyware** is software that collects personal information without your knowledge or permission. Typically, spyware is downloaded and installed on your computer along with free software, such as freeware, games, or music file-sharing programs. Spyware is often associated with **Adware** software that displays advertisements, such as a pop-up ad. Examples of spyware and unauthorized adware include programs that change your home page or search page without your permission. To avoid spyware and adware, read the fine print in license agreements when you install software, scan your computer for spyware and adware with detection and removal software (such as Ad-aware from Lavasoft), and turn on Pop-up Blocker. See the Microsoft Windows Help system for specific details.

## Avoiding Harmful Attacks Using Office

There are a few things you can do within any Office 2007 program to keep your system safe from the infiltration of harmful attacks.

**1) Make sure you activate macro, ActiveX, add-in, and VBA code detection and notification.** You can use the Trust Center to help protect you from attached code attacks. The Trust Center checks for trusted publisher and code locations on your com-

puter and provides security options for add-ins, ActiveX controls, and macros to ensure the best possible protection. The Trust Center displays a security alert in the Message Bar when it detects a potentially harmful attack.

**2) Make sure you activate Web site spoofing detection and notification.** You can use the Trust Center to help protect you from homograph attacks. The *Check Office documents that are from or link to suspicious Web sites* check box under Privacy Options in the Trust Center is on by default and continually checks for potentially spoofed domain names. The Trust Center displays a security alert in the Message Bar when you have a document open and click a link to a Web site with an address that has a potentially spoofed domain name, or you open a file from a Web site with an address that has a potentially spoofed domain name.

**3) Be very careful of file attachments in e-mail you open.** As you receive e-mail, don't open or run an attached file unless you know who sent it and what it contains. If you're not sure, you should delete it. The Attachment Manager provides security information to help you understand more about the file you're opening. See the Microsoft Office Help system for specific details.

## Avoiding Harmful Attacks Using Windows

There are a few things you can do within Microsoft Windows to keep your system safe from the infiltration of harmful attacks.

**1) Make sure Windows Firewall is turned on.** Windows Firewall helps block viruses and worms from reaching your computer, but it

doesn't detect or disable them if they are already on your computer or come through e-mail. Windows Firewall doesn't block unsolicited e-mail or stop you from opening e-mail with harmful attachments.

**2) Make sure Automatic Updates is turned on.** Windows Automatic Updates regularly checks the Windows Update Web site for important updates that your computer needs, such as security updates, critical updates, and service packs. Each file that you download using Automatic Update has a digital signature from Microsoft to ensure its authenticity and security.

**3) Make sure you are using the most up-to-date antivirus software.** New viruses and more virulent strains of existing viruses are discovered every day. Unless you update your virus-checking software, new viruses can easily bypass outdated virus checking software. Companies such as McAfee and Symantec offer shareware virus checking programs available for download directly from their Web sites. These programs monitor your system, checking each time a file is added to your computer to make sure it's not in some way trying to change or damage valuable system files.

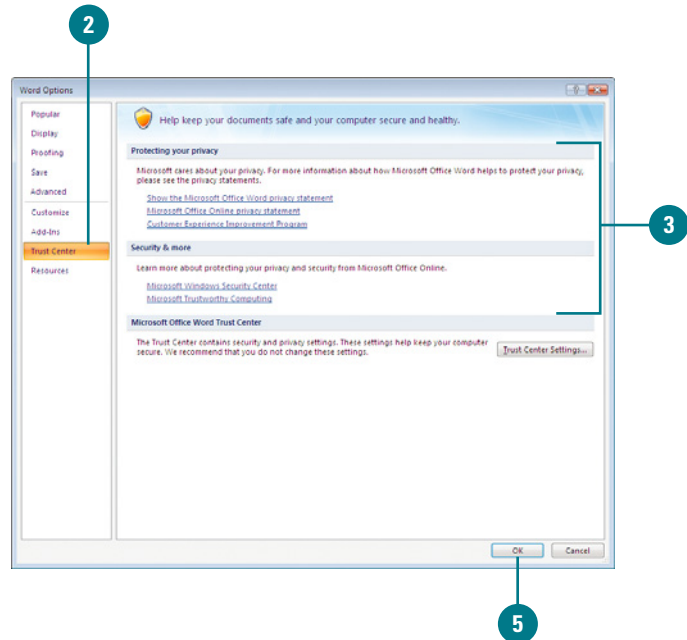
**4) Be very careful of the sites from which you download files.** Major file repository sites, such as FileZ, Download.com, or TuCows, regularly check the files they receive for viruses before posting them to their Web sites. Don't download files from Web sites unless you are certain that the sites check their files for viruses. Internet Options monitors downloads and warns you about potentially harmful files and gives you the option to block them.

# Using the Trust Center

## View the Trust Center

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click the links in which you want online information at the Microsoft Online Web site.
  - ◆ **Show the Microsoft Office privacy statement.** Opens a Microsoft Web site detailing privacy practices.
  - ◆ **Microsoft Office Online privacy statement.** Opens a Microsoft Web site detailing privacy practices.
  - ◆ **Customer Experience Improvement Program.** Opens the Microsoft Customer Experience Improvement Program (CEIP) Web site.
  - ◆ **Microsoft Windows Security Center.** Opens Windows Security Center on your computer.
  - ◆ **Microsoft Trustworthy Computing.** Opens a Microsoft Web site detailing security and reliability practices.
- 4 When you're done, close your Web browser or dialog box, and return to Office.
- 5 Click **OK**.

The **Trust Center (New!)** is a place where you set security options and find the latest technology information as it relates to document privacy, safety, and security from Microsoft. The Trust Center allows you to set security and privacy settings—Trusted Publishers, Trusted Locations, Add-ins, ActiveX Settings, Macro Settings, Message Bar, and Privacy Options—and provides links to Microsoft privacy statements, a customer improvement program, and trustworthy computing practices.

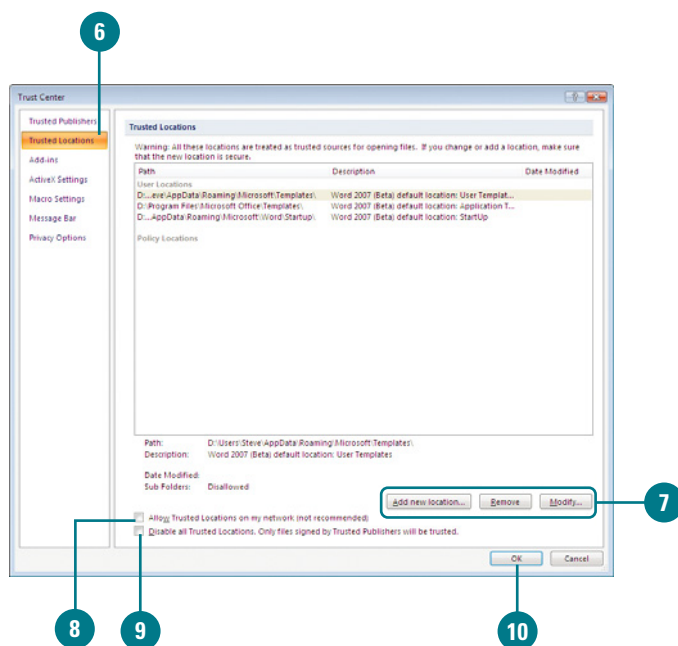


# Selecting Trusted Publishers and Locations

## Modify Trusted Publishers and Locations

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Trusted Publishers**.
- 5 Select a publisher, and then use the **View** and **Remove** buttons to make the changes you want.
- 6 In the left pane, click **Trusted Locations**.
- 7 Select a location, and then use the **Add new location**, **Remove**, and **Modify** buttons to make the changes you want.
- 8 Select or clear the **Allow Trusted Locations on my network (not recommended)** check box.
- 9 Select or clear the **Disable all Trusted Locations, only files signed by Trusted Publishers will be trusted** check box.
- 10 Click **OK**.
- 11 Click **OK**.

The Trust Center security system continually checks for external potentially unsafe content in your documents. Hackers can hide Web beacons in external content—images, linked media, data connections and templates—to gather information about you or cause problems. When the Trust Center detects potentially harmful external content, the Message Bar appears with a security alert and options to enable or block the content. Trusted publishers are reputable developers who create application extensions, such as a macro, ActiveX control, or add-in. The Trust Center uses a set of criteria—valid and current digital signature, and reputable certificate—to make sure publishers' code and source locations are safe and secure. If you are sure that the external content is trustworthy, you can add the content publisher and location to your trusted lists (**New!**), which allows it to run without being checked by the Trust Center.

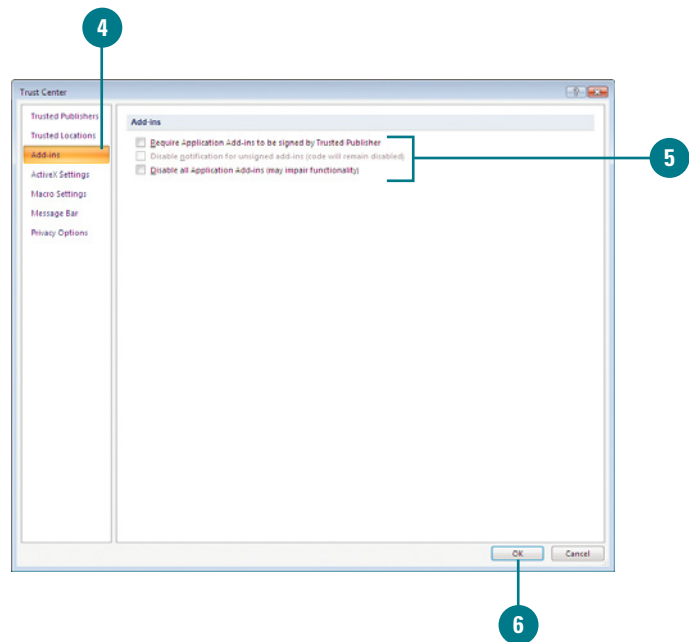


# Setting Add-in Security Options

## Set Add-in Security Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Add-ins**.
- 5 Select or clear the check boxes you do or don't want.
  - ◆ **Require Application Add-ins to be signed by Trusted Publisher.** Select to check for a digital signature on the .dll file.
  - ◆ **Disable notification for unsigned add-ins (code will remain disabled).** Only available if the above check box is selected. Select to disable unsigned add-ins without notification.
  - ◆ **Disable all Application Add-ins (may impair functionality).** Select to disable all add-ins without any notifications.
- 6 Click **OK**.
- 7 Click **OK**.

An add-in, such as smart tags, extends functionality to Microsoft Office programs (**New!**). An add-in can add buttons and custom commands to the Ribbon. When an add-in is installed, it appears on the Add-Ins tab of an Office program and includes a special ScreenTip that identifies the developer. Since add-ins are software code added to Microsoft Office programs, hackers can use them to do malicious harm, such as spreading a virus. The Trust Center uses a set of criteria—valid and current digital signature, reputable certificate and a trusted publisher—to make sure add-ins are safe and secure. If it discovers a potentially unsafe add-in, it disables the code and notifies you in the Message Bar. If the add-in security options are not set to the level you need, you can change them in the Trust Center.

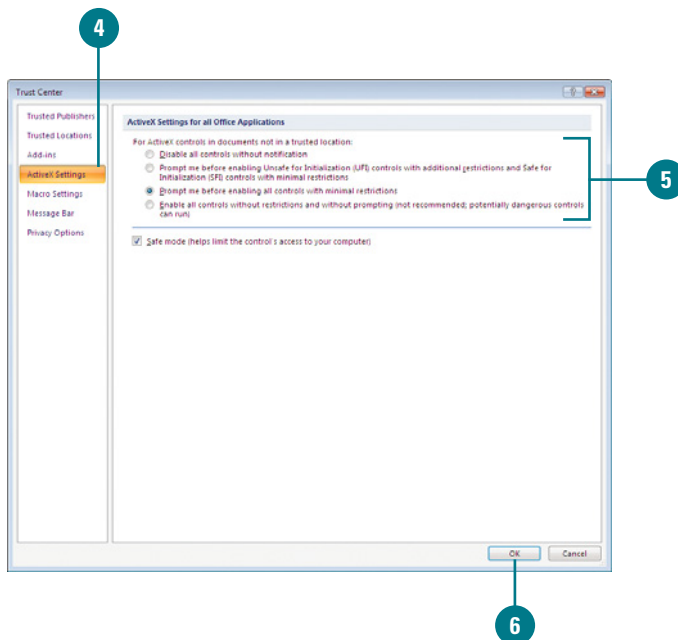


# Setting ActiveX Security Options

## Change ActiveX Security Settings

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **ActiveX Settings**.
- 5 Click the option you want for ActiveX in documents not in a trusted location.
  - ◆ Disable all controls without notification.
  - ◆ Prompt me before enabling Unsafe for Initialization controls with additional restrictions and Save for Initialization (SFI) controls with minimal restrictions (default).
  - ◆ Prompt me before enabling all controls with minimal restrictions.
  - ◆ Enable all controls with restrictions and without prompting (not recommended, potentially dangerous controls can run).
- 6 Click **OK**.
- 7 Click **OK**.

An ActiveX control (**New!**) provides additional functionality, such as a text box, button, dialog box, or small utility program. ActiveX controls are software code, so hackers can use them to do malicious harm, such as spreading a virus. You can use the Trust Center to prevent ActiveX controls from harming your computer. If the ActiveX security options are not set to the level you want, you can change them in the Trust Center. If you change ActiveX control settings in one Office program, it effects all Microsoft Office programs. The Trust Center uses a set of criteria—checks the kill bit and Safe for Initialization (SFI) settings—to make sure ActiveX controls run safely.

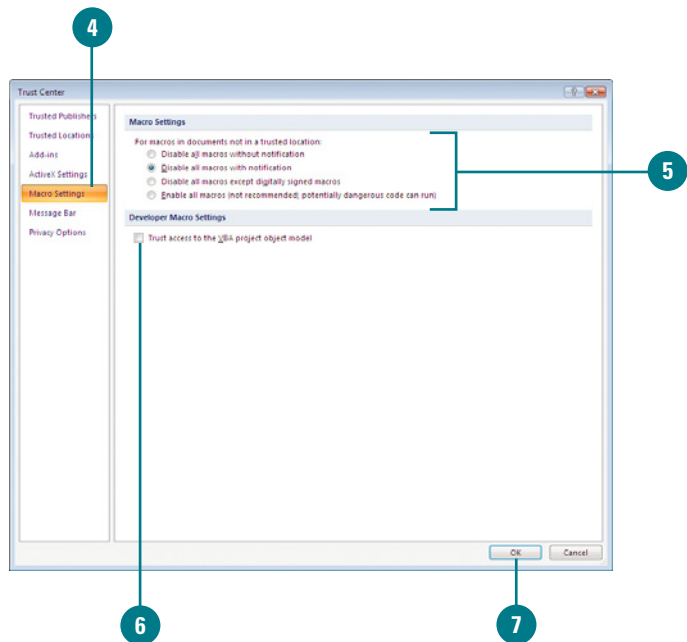


# Setting Macro Security Options

## Change Macro Security Settings

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Macro Settings**.
- 5 Click the option you want for macros in documents not in a trusted location.
  - ◆ Disable all macros without notification.
  - ◆ Disable all macros with notification (default).
  - ◆ Disable all macros except digitally signed macros.
  - ◆ Enable all macros (not recommended, potentially dangerous code can run).
- 6 If you're a developer, select the **Trust access to the VBA project object model** check box.
- 7 Click **OK**.
- 8 Click **OK**.

A macro allows you to automate frequently used steps or tasks to save time and work more efficiently. Macros are written using VBA (Visual Basic for Applications) code, which opens the door to hackers to do malicious harm, such as spreading a virus. The Trust Center uses a set of criteria—valid and current digital signature, reputable certificate and a trusted publisher—to make sure macros are safe and secure. If the Trust Center discovers a potentially unsafe macro, it disables the code and notifies you in the Message Bar. You can click Options on the Message Bar to enable it or set other security options. If the macro security options are not set to the level you need, you can change them in the Trust Center (**New!**).

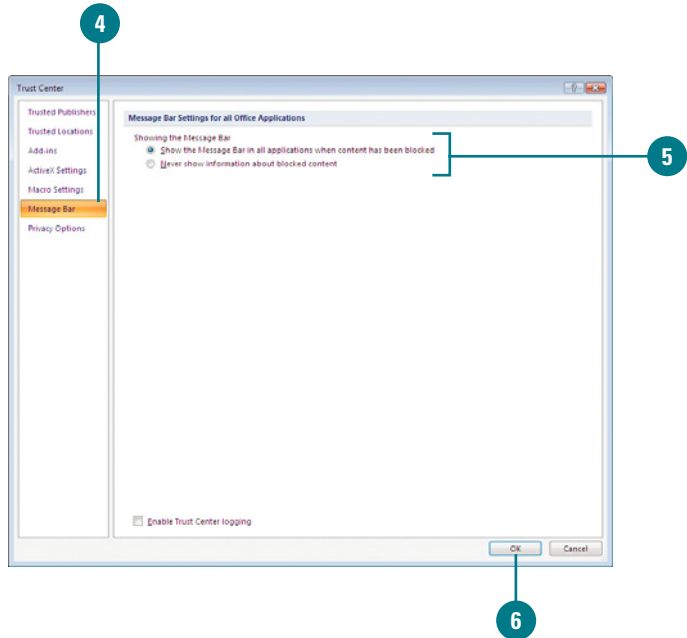


# Changing Message Bar Security Options

## Modify Message Bar Security Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Message Bar**.
- 5 Click the option you want for showing the Message bar.
  - ◆ Show the Message Bar in all applications when content has been blocked (default).
  - ◆ Never show information about blocked content.
- 6 Click **OK**.
- 7 Click **OK**.

The Message Bar (**New!**) displays security alerts when Office detects potentially unsafe content in an open document. The Message Bar appears below the Ribbon when a potential problem arises. The Message Bar provides a security warning and options to enable external content or leave it blocked. If you don't want to receive alerts about security issues, you can disable the Message Bar.

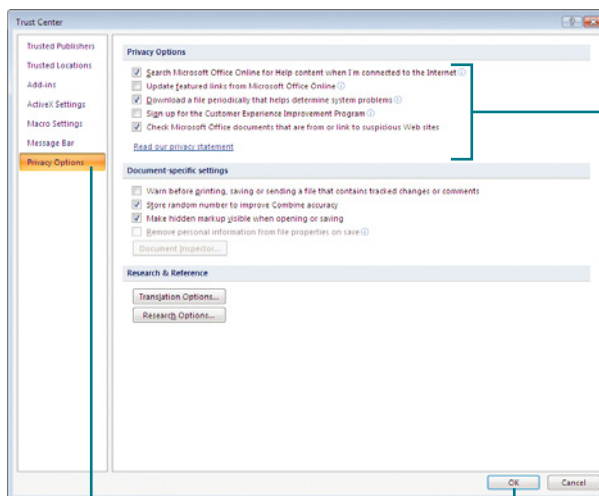


# Setting Privacy Options

## Set Privacy Options

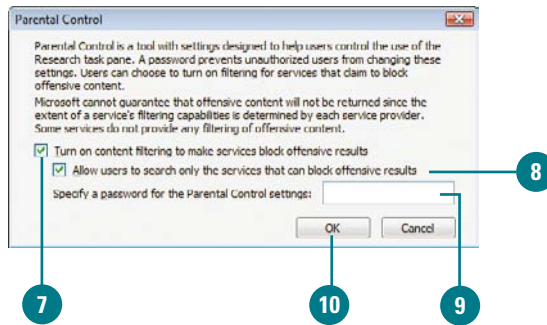
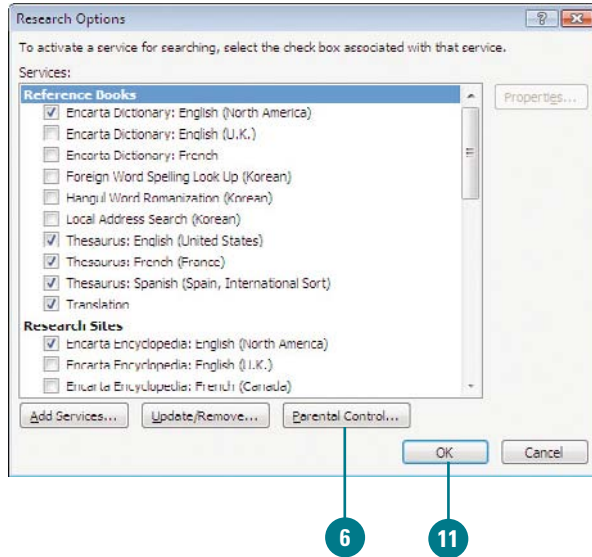
- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Privacy Options**.
- 5 Select or clear the check boxes you do or don't want.
  - ◆ **Search Microsoft Office Online for Help content when I'm connected to the Internet.** Select to get up-to-date Help content.
  - ◆ **Update featured links from Microsoft Office Online.** Select to get up-to-date headlines and featured templates.
  - ◆ **Download a file periodically that helps determine system problems.** Select to have Microsoft request error reports, update trouble-shooting help, and accept downloads from Office Online.
  - ◆ **Sign up for the Customer Experience Improvement Program.** Select to sign-up.
  - ◆ **Check Microsoft Office documents that are from or link to suspicious Web sites.** Select to check for spoofed Web sites.
- 6 Click **OK**.
- 7 Click **OK**.

Privacy options in the Trust Center allow you to set security settings that protect your personal privacy online. For example, the *Check Office documents that are from or link to suspicious Web sites* option checks for spoofed Web sites and protects you from phishing schemes (**New!**). If your kids are doing research online using the Research task pane, you can set Privacy Options to enable parental controls and a password to block sites with offensive content.



## Set Parental Controls for Online Research

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **Privacy Options**.
- 5 Click **Research Options**.
- 6 Click **Parental Control**.
- 7 Select the **Turn on content filtering to make services block offensive results** check box.
- 8 Select the **Allow users to search only the services that can block offensive results** check box, if necessary.
- 9 Enter a password, so users cannot change these settings.
- 10 Click **OK**, retype the password, and then click **OK**.
- 11 Click **OK**.
- 12 Click **OK**.



# Working with Office Safe Modes

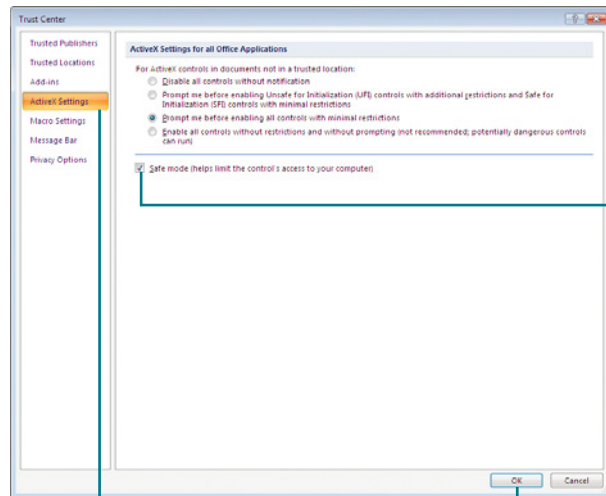
## Enable Safe Mode

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Trust Center**.
- 3 Click **Trust Center Settings**.
- 4 In the left pane, click **ActiveX Settings**.
- 5 Select the **Safe Mode (Helps limit the control's access to your computer)** check box.
- 6 Click **OK**.
- 7 Click **OK**.

### See Also

See “Diagnosing and Repairing Problems” on page 32 for information on fixing problems with a Microsoft Office 2007 program.

Microsoft Office 2007 uses two types of safe modes—Automated and User-Initiated (**New!**)—when it encounters a program problem. When you start an Office 2007 program, it automatically checks for problems, such as an extension not properly loading. If the program is not able to start the next time you try, the programs starts in **Automated Safe mode**, which disables extensions—macros, ActiveX controls, and add-ins—and other possible problem areas. If you’re having problems and the Office program doesn’t start in Automated Safe mode, you can start the program in **User-Initiated Safe mode**. When you start an Office program in Office Safe mode, not all features are available. For instance, templates can’t be saved, AutoCorrect list is not loaded, Smart tags are not loaded, preferences cannot be saved, restricted permission (IRM) can’t be used, and all command-line options are ignored (except /a and /n). Before you can use Office Safe mode, you need to enable it in the Trust Center. When you’re in safe mode, you can use the Trust Center to find out the disabled items and enable them one at a time to help you pin point the problem.

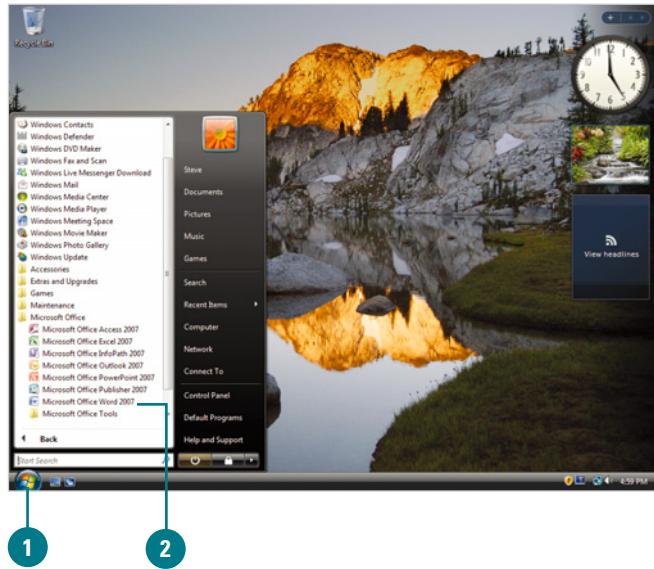


## Start User-Initiated Safe Mode

- 1 Click the **Start** button on the taskbar, point to **All Programs**, and then click **Microsoft Office**.
- 2 Press and hold Ctrl, and then click **Microsoft Office Word 2007**.

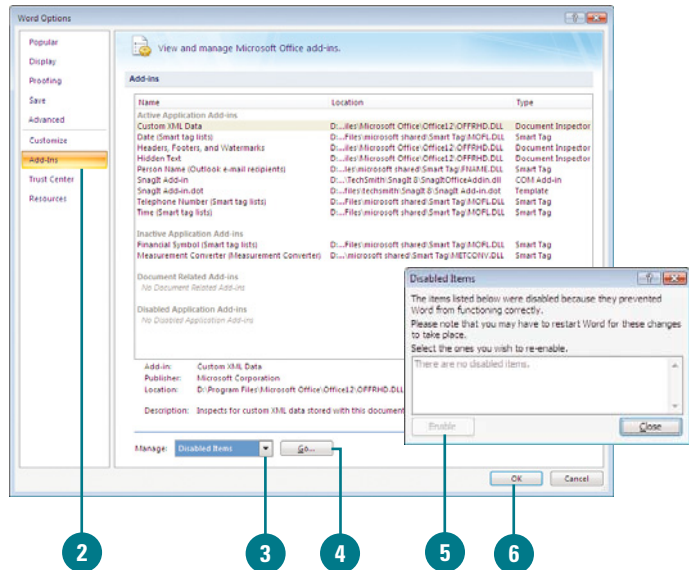
### Did You Know?

You can use the **Run** dialog box to work in **Safe mode**. At the command prompt, you can use the `/safe` parameter at the end of the command-line to start the program.



## View Disabled Items

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Add-Ins**.
- 3 Click the **Manage** list arrow, and then click **Disabled Items**.
- 4 Click **Go**.
- 5 In the dialog box, you can select an item, click **Enable** to activate and reload the add-in, and then click **Close**.
- 6 Click **OK**.



# Marking a Document as Read-Only

Microsoft Certified Application Specialist

WD07S-6.2.2

## Mark an Office Document as Final

1 Click the **Office** button, point to **Prepare**, and then click **Mark as Final**.

2 Click **OK**, and then click **OK** again, if necessary.

The document is marked as final and then saved.

3 If necessary, click **OK** and verify your Right Management account credentials using your .NET password.

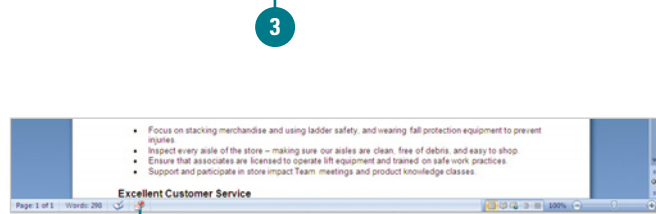
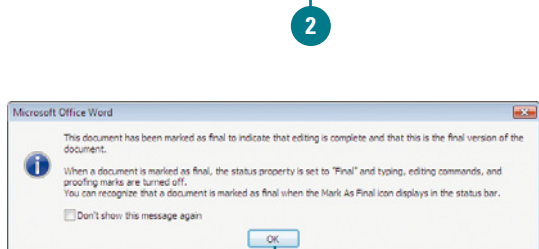
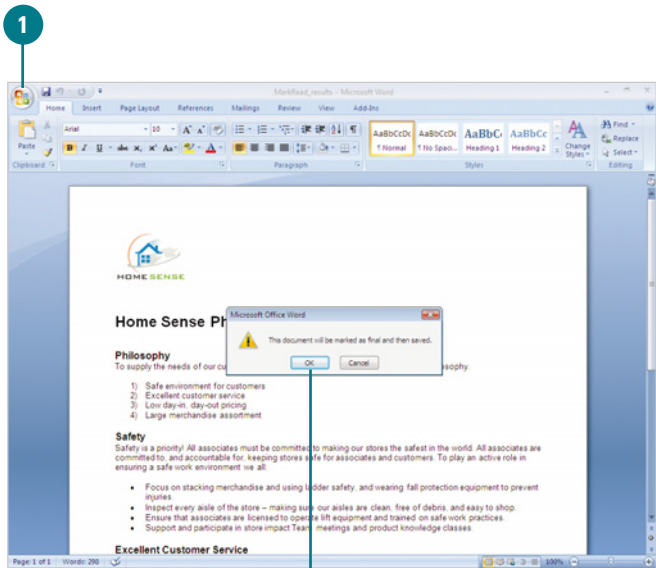
The Mark as Final icon appears in the Status bar to indicate the document is currently marked as final.

**IMPORTANT** An Office Word 2007 document marked as final is not read-only when opened in an earlier version of Microsoft Office Word.

### Did You Know?

You can enable editing for a document marked as final. Click the Office button, point to Prepare, and then click Mark as Final again to toggle off the Mark as Final feature.

As a precaution to prevent readers and reviews from making accidental changes, you can use the Mark as Final command (**New!**) to make a Word 2007 document read-only. The Mark as Final command disables or turns off typing, editing commands, and proofing marks, and sets the *Status property* field in the Document Information Panel to Final. The Mark as Final command is not a security option; it only prevents changes to the document while it's turned on and it can be turned off by anyone at any time.



Mark as Final icon

# Reviewing and Sharing Documents

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# 14

## Introduction

If you work in an office environment with Microsoft Office Word 2007, or are part of some other group that routinely collaborates in document preparation, learning the basics of document sharing is a must. The greater the number of people that interact with a document before it reaches final form, the more critical it becomes for you to keep track of versions, comments, the source of all editing marks, and adequately manage the process of correcting them.

Because working together on a document may be crucial to the success of its completion, there might be various levels of security that need to be set for your readers. Some may have full access to read and make changes, while others are limited to just reading the document, and still other may only be able to read part of the document because it contains hidden text.

After you finish making changes to a document, you can quickly send it to another person for review using e-mail. Word allows you to send documents out for review as an attachment, either a document, PDF, or XPS document, using e-mail from within the program so that you do not have to open your e-mail program. If you are a member of an online fax service—such as eFax, InterFAX, MyFax, or Send2Fax—you can use Office to send and receive faxes over the Internet directly from within Word.

## What You'll Do

**Prepare for Comments and Track Changes**

**Insert Comments**

**Read and Edit Comments**

**Use Track Changes**

**Modify Track Changes Options**

**Compare and Merge Documents**

**Share Templates**

**Send a Document for Review Using E-mail**

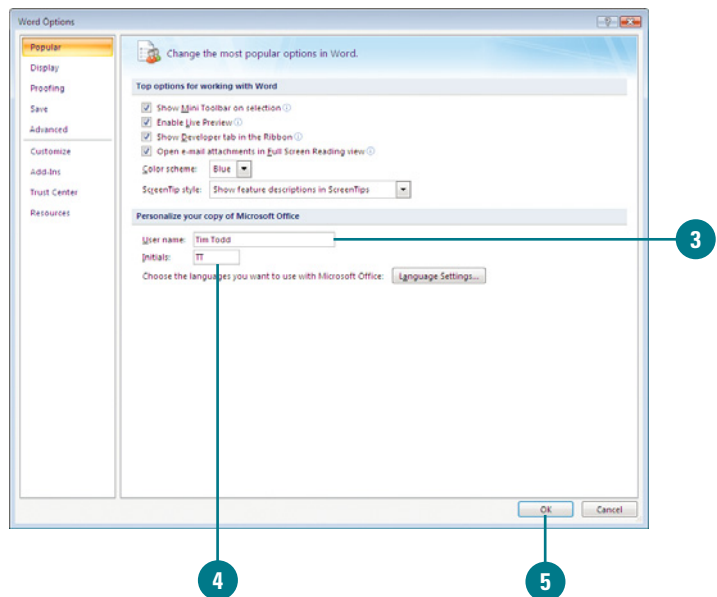
**Send a Document by Internet Fax**

# Preparing for Comments and Track Changes

## Set User Information for Comments and Track Changes

- 1 Click the **Review** tab.
- 2 Click the **Track Changes** button, and then click **Change User Name**.
  - ◆ You can also click the Office button, click Word Options, and then click Popular in the left pane.
- 3 Type your name.
- 4 Type your initials.
- 5 Click **OK**.

When you enter a comment or make a change in a document with track changes, Word includes the name and initials of the person who made the comment or change. You can set or change this information in the Word Options dialog box, which you can access from the Track Changes button the Review tab. When you work with comments or track changes, you can choose to display them in balloons that show off the right-side of the document or in the Reviewing pane that show vertically or horizontally in a separate pane. After you choose how you want to display comments and track changes, you can use the Show Markup button to show or hide different elements—including Comments, Ink, Insertion and Deletions, Formatting, and Markup Area Highlights—on the screen during your review. If you have multiple people reviewing a document, you can use the Show Markup button to display the reviewers you want to display. Once you choose the elements you want to show, you can use the Display for Review list arrow on the Review tab to choose how to view the proposed changes to a document. You can show the original or final proposed document with or without showing markup.



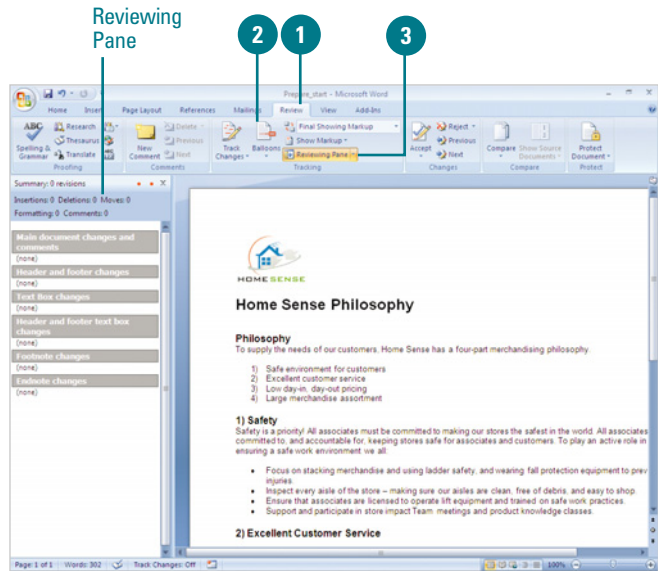
## Use Balloons or Reviewing Pane

- 1 Click the **Review** tab.
- 2 Click the **Balloons** button, and then select the option you want:

- ◆ **Show Revisions in Balloons.**
- ◆ **Show All Revisions Inline.** Show changes in the document.
- ◆ **Show Only Comments and Formatting in Balloons.** Hide content changes.

- 3 Click the **Reviewing Pane** button arrow, and then click **Reviewing Pane Vertical** or **Reviewing Pane Horizontal**.

- ◆ To show or hide the Reviewing pane, click the **Reviewing Pane** button.

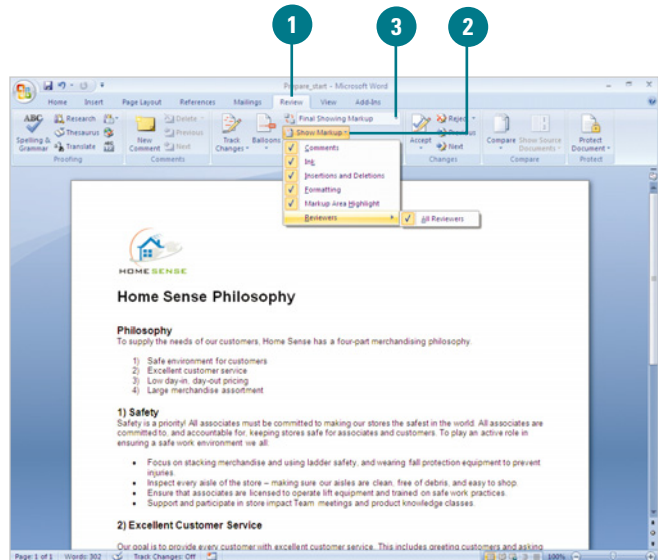


## Show or Hide Elements Using Show Markup

- 1 Click the **Review** tab.
- 2 Click the **Show Markup** button, and then select the option you want: **Comments**, **Ink**, **Insertion and Deletions**, **Formatting**, **Markup Area Highlight**, or **Reviewers**.

- ◆ For the Reviewers option, you can show individual or All Reviewer's contributions.

- 3 Click the **Display for Review** list arrow, and then select how to view the proposed changes to the document: **Final Showing Markup**, **Final, Original Showing Markup**, or **Original**.



# Inserting Comments



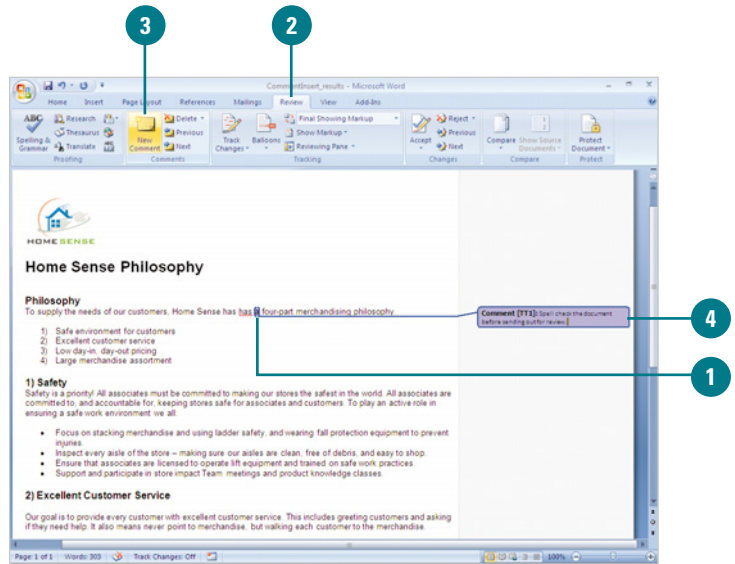
Comments are useful when someone who is editing the document has questions pertaining to the document. Perhaps a particular passage needs to be clarified. Maybe the formatting of an item is inconsistent. In Word, you can insert a comment or respond to a comment as you review a document and provide feedback. When you insert a comment in Print Layout view, it opens a balloon or the Reviewing pane where you can enter a comment. If you use a Tablet PC, you can also insert a voice comment or a handwritten comment.

## Insert a Comment

- 1 Position the insertion pointer where you want to insert a comment.
- 2 Click the **Review** tab.
- 3 Click the **New Comment** button.
- 4 Type your comment in the balloon, and then click outside the balloon to save it.

### Did You Know?

**You can insert a voice comment.** On a Tablet PC, add the Insert Voice button command to the Quick Access Toolbar using the Customize pane in Word Options. Click the Insert Voice button, click the Start button and record the voice comment. When you're done, press the Stop button and close the dialog box. If necessary, click Yes to update the sound object.

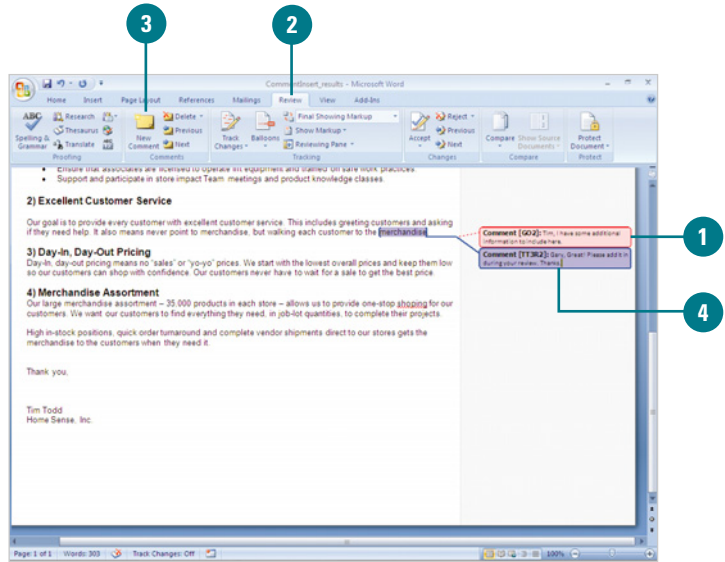


## Respond to a Comment

- 1 Click the balloon of the comment in which you want to respond.
- 2 Click the **Review** tab.
- 3 Click the **New Comment** button.
- 4 Type your response in the new comment balloon, and then click outside the balloon to save it.

### Did You Know?

*You can insert a handwritten comment.* On a Tablet PC, click the Review tab, click the New Comment button, and then write the comment in the comment balloon. To show ink, click the Show Markup button, and then click Ink.

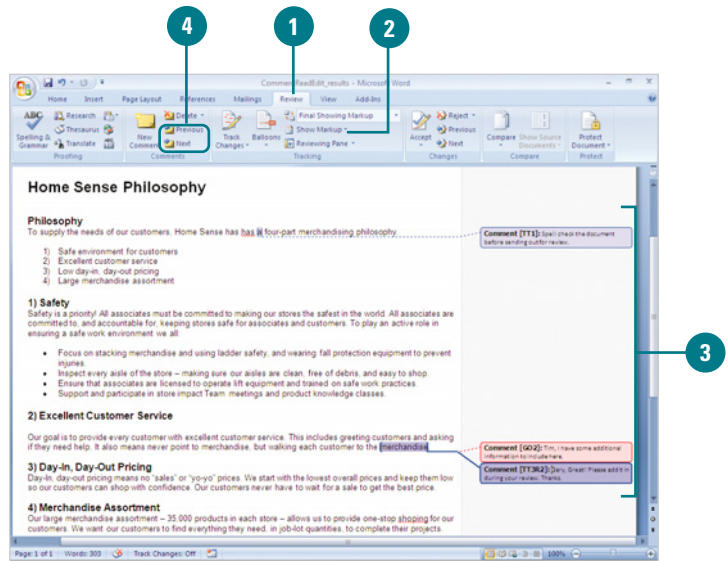


# Reading and Editing Comments

## Display and Read a Comment

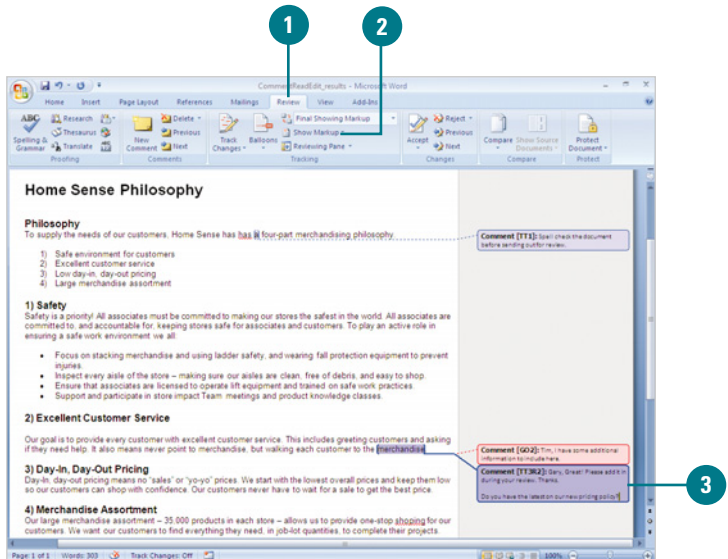
- 1 Click the **Review** tab.
- 2 Click the **Show Markup** button, and then click **Comments**.
- 3 Read the comment.
- 4 Click the **Previous** or **Next** button to read another comment.

Before you can view, read and edit comments, you need to show them on the screen. The Show Markup button on the Review tab allows you to show or hide comments and tracking information. You can edit the text in a comment the same way you edit text in a document. If you have dealt with a comment or no longer need it, you can delete it. If you prefer to delete comment all at once, you can use the Delete button on the Review tab to delete all comments shown or all comments in the document.



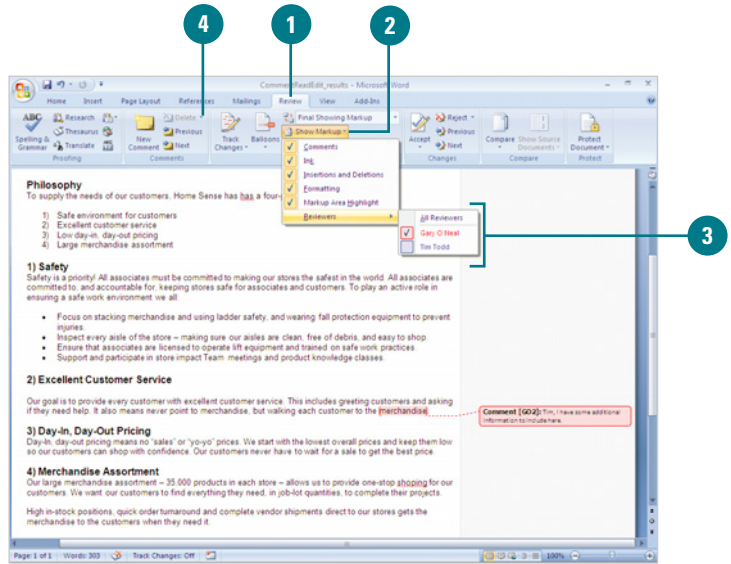
## Edit a Comment

- 1 Click the **Review** tab.
- 2 Click the **Show Markup** button, and then click **Comments**.
- 3 Click the text in the comment, make your changes, and then click outside the balloon to save it.



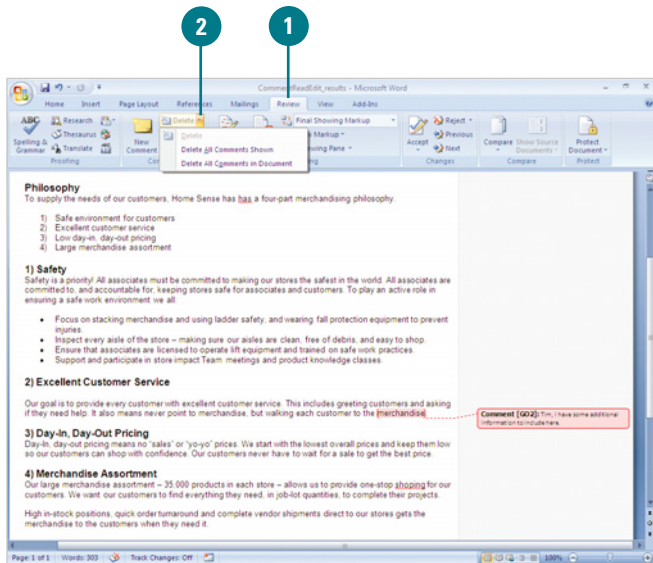
## Delete Comments for a Specific Reviewer

- 1 Click the **Review** tab.
- 2 Click the **Show Markup** button arrow, and then point to **Reviewers**.
- 3 Click the name of the reviewer whose comments you want to delete, or click **All Reviewers**.
- 4 Click the **Delete** button arrow, and then click **Delete All Comments Shown**.



## Delete All Comments

- 1 Click the **Review** tab.
- 2 Click the **Delete** button arrow, and then click **Delete All Comments in Document**.



### Did You Know?

**You can quickly delete a comment.**

Select the comment, and then click the Delete button on the Review tab, or right-click the comment, and then click Delete Comment.

**You can also use the Reviewing Pane to work with comments.** Click the Review tab, click the Reviewing Pane button arrow, click Reviewing Pane Vertical or Reviewing Pane Horizontal.

# Using Track Changes

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WD07S-5.3.1, WD07S-5.3.2,  
WD07S-5.3.3, WD07S-5.4

## Track Changes as You Work

- 1 Open the document you want to edit.
- 2 Click the **Review** tab.
- 3 Click the **Track Changes** button, and then click **Track Changes**.

The Track Changes box on the Status bar becomes active.

**TIMESAVER** Double-click *Track Changes* on the Status bar or press **Ctrl+Shift+E** to turn tracking on or off.

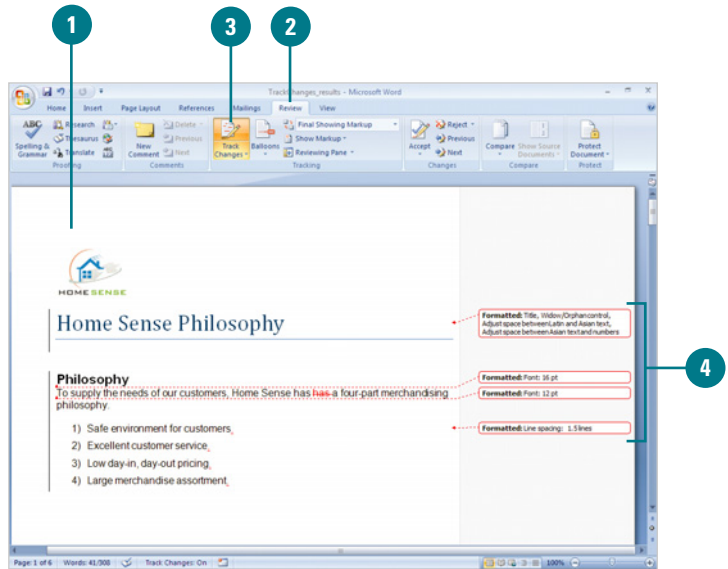
- 4 Make changes to your document. The changes are reflected using alternate color characters, along with comments in balloons at the side of the screen (if you are in Print Layout view) or displayed in a separate window at the bottom of the screen (if you are in Draft view).
- 5 Click the **Track Changes** button to turn off track changes.

### Did You Know?

**You can show or hide balloons.**

Click the Review tab, click the Balloons button, and then select Show Revisions in Balloons, Show Revisions Inline, or Show Only Comments and Formatting in Balloons.

Tracking changes in a document allows you to make revisions to a document without losing the original text. Word shows changed text in a different color from the original text and uses revision marks, such as underlines, to distinguish the revised text from the original. You can review changes by using the Review tab, which contains buttons that let you accept and reject changes and comments. If you compare and merge two documents, you can review the changes and accept or reject the results.



Track Changes turned on

## Review Changes

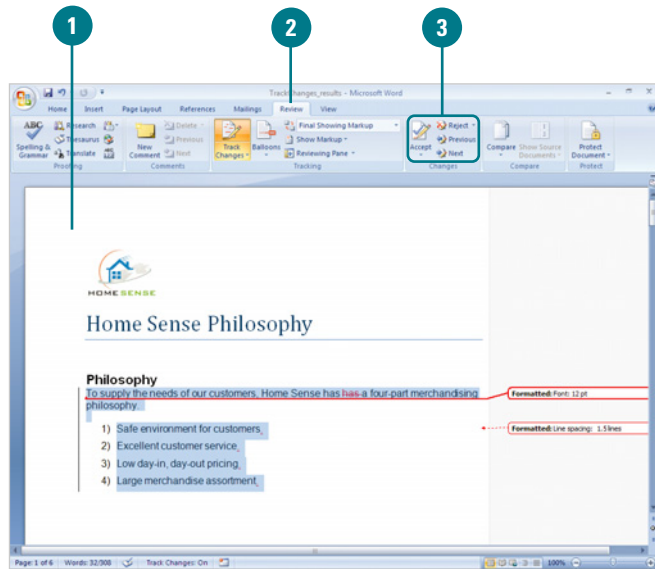
- 1 Open the document you want to review.
- 2 Click the **Review** tab.
- 3 Use the buttons on the Review tab to review changes:
  - ◆ Click the **Next** button or the **Previous** button to view changes one at a time.
  - ◆ Click the **Accept** button or the **Reject** button to respond to the revisions.
  - ◆ Click the **Accept** button arrow, and then click **Accept All Changes in Document** to accept all changes at once.
  - ◆ Click the **Reject** button arrow, and then click **Reject All Changes in Document** to reject all changes at once.

### Did You Know?

**You can display different versions of reviewing marks.** Click the Review tab, click the Display for Review list arrow, and then select an option (Final Showing Markup, Final, Original Showing Markup, or Original).

**You can show or hide individual reviewers.** Click the Review tab, click the Show Markup button, point to Reviewers, and then click the reviewer you want to show or hide.

**You can show or hide the Reviewing pane.** The Reviewing pane shows a list of changes in a pane. Click the Review tab, click the Reviewing Pane button, and then click the option you want.



## For Your Information

### Printing a Document with Track Changes

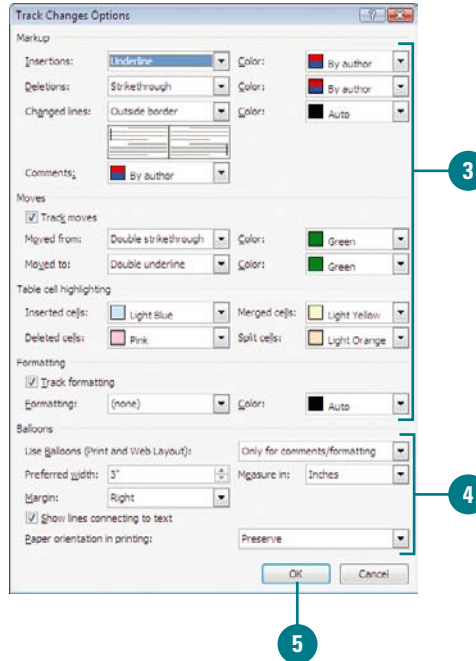
If you want to review a print out of document changes, Word provides several options for printing documents with track changes. Before you can print a document with track changes and comment showing, you need to switch to Print Layout view and display the tracked changes and comments you want to print. Click the Review tab, click the Show Markup button, and then select the options or reviewers you want to display. Click the Display for Review list arrow, and then select the option you want to display. Click the Office button, click Print, click the Print what list arrow, click Document showing markup or List of markup, select other print options you want, and then click OK. To change the print layout for track changes, click the Track Changes button arrow, click Change Tracking Options, click the Paper orientation in printing list arrow, select the option you want, and then click OK.

# Modifying Track Changes Options

## Modify Track Changes Options

- 1 Click the **Review** tab.
- 2 Click the **Track Changes** button, and then click **Change Tracking Options**.
- 3 Specify the markup options you want when you make changes.
  - ◆ **Insertions.** Marks inserted text.
  - ◆ **Deletions.** Marks deleted text.
  - ◆ **Formatting.** Marks formatting changes.
  - ◆ **Changed Lines.** Sets the location of vertical line that marks changed paragraphs.
  - ◆ **Comments Color.** Sets the color applied to all comments.
- 4 Specify the balloons options you want.
  - ◆ **Use Balloons (Print and Web Layout).** Sets display option for balloons.
  - ◆ **Preferred width.** Sets balloon width.
  - ◆ **Margin.** Sets margin location for balloons.
- 5 Click **OK**.

You can customize the way track changes marks up a document. When you make insertion, deletion, and formatting changes, you can change the markup text to display the change with a specific color or formatting style, such as bold, italic, underline, double underline, and strikethrough. If you are using balloons in Print and Web Layout views, you can specify a preferred size and location in your document. If you prefer not to use balloons, you can turn the option off.



# Comparing and Merging Documents

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WD07S-5.2.1, WD07S-5.2.2,  
WD07S-5.2.3

## Compare and Merge Documents

- 1 Click the **Review** tab.
- 2 Click the **Compare** button, and then click **Compare**.

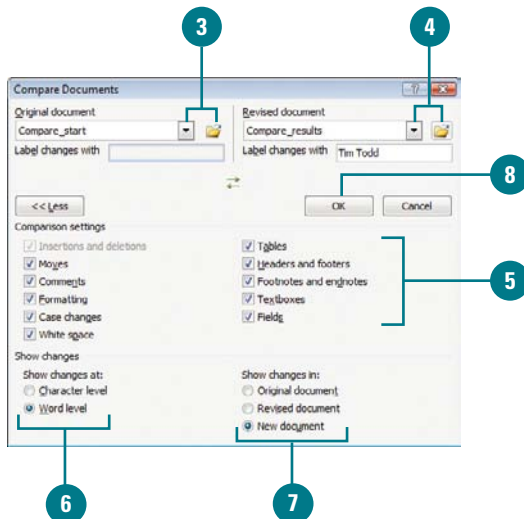
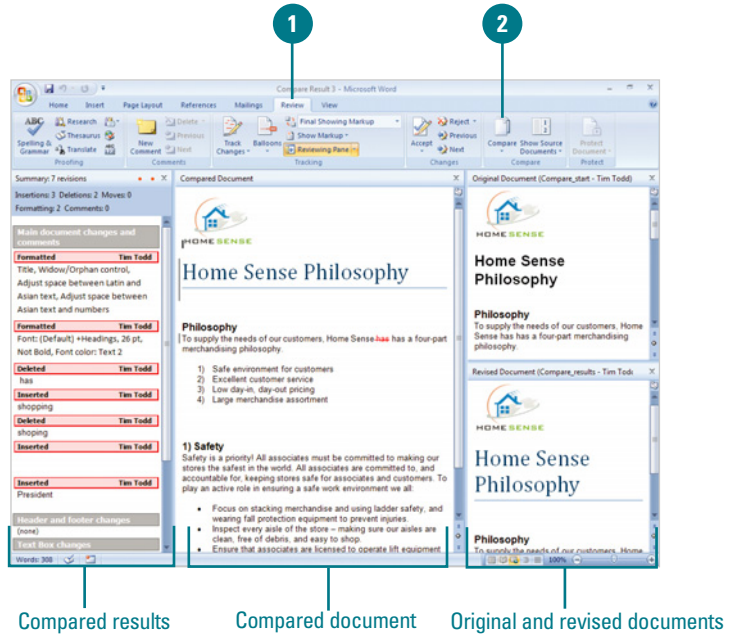
To merge documents, click the **Compare** button, and then click **Merge**.

- 3 Click the **Original document** list arrow, and then select the original document you want to use, or click the **Browse** button and double-click it.
- 4 Click the **Revised document** list arrow, and then select the revised document you want to use, or click the **Browse** button and double-click it.

If necessary, click **More**.

- 5 Select and clear the comparison settings you want and don't want.
- 6 Click the Show changes at option you want (**Character level** or **Word level**).
- 7 Click the Show changes in option you want (**Original document**, **Revised document**, or **New document**).
- 8 Click **OK**.
- 9 If necessary, select a keep formatting option, and then click **OK**.

If you want to compare an earlier version of a document with the current version, or if you receive multiple edited versions of the original document back from the recipients, you can compare the documents and merge the changes into one document. The changes can be merged into one document or viewed for comparison. When you compare or merge documents, the text that differs between the two versions will be highlighted in a different color or with track reviewing marks (**New!**).



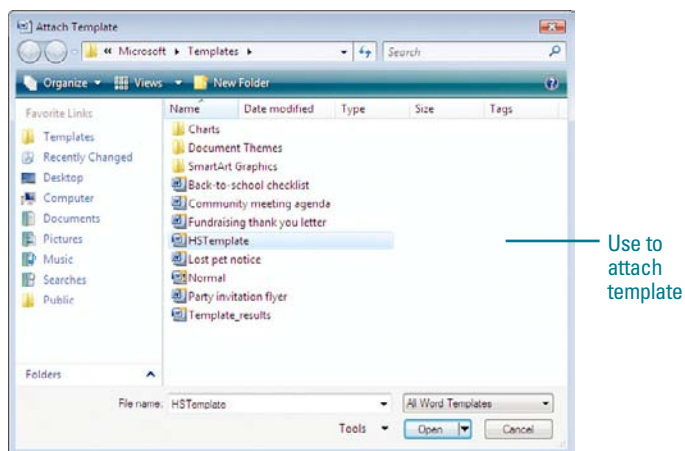
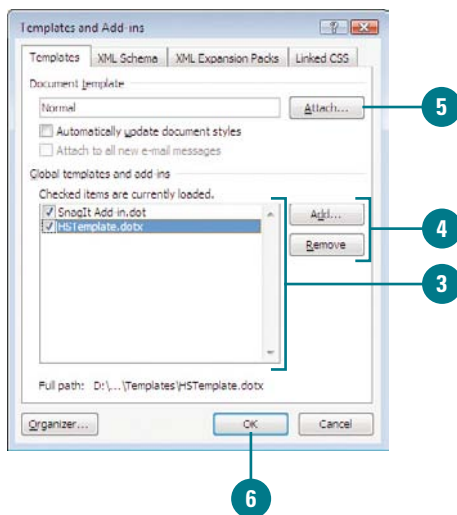
# Sharing Templates



To save time, Word allows you to copy features from one template to another. Once you create a style or macro you never have to create it again. You can simply copy it to another template to use it with a whole new set of documents. You can also replace all the styles in a document with those from a different template by attaching the new template to that document. Word uses two types of templates—global and document. All documents have access to the Normal global template, and many documents have document templates attached that provide formatting instructions. You can load templates as needed to serve as global templates. When you load global templates, you can specify whether they are to be available for the current session only or available whenever you start Word. If you want to change the template used by the current document (typically Normal.dotx) to another one, use the Attach button in the Template and Add-Ins dialog box.

## Load, Unload, or Attach Templates

- 1 Open the document with the template you want to use to attach another template, and then click the **Developer** tab.
- 2 Click the **Document Template** button.
- 3 Select or clear the check box next to the global template or add-in you want to load or unload.
- 4 To add or remove one a global template or add-in, do one of the following:
  - ◆ **Add.** Click **Add**, navigate to the folder that contains the add-in, click the **Files of type** list arrow, select **Word Add-Ins**, click the add-in, and then click **OK**.
  - ◆ **Remove.** Select the item you want to remove, and then click **Remove**.
- 5 To attach a template to a document (transfer styles), click **Attach**, locate and select the template file, and then click **Open**.
- 6 Click **OK**.



## Copy Functionality Between Templates

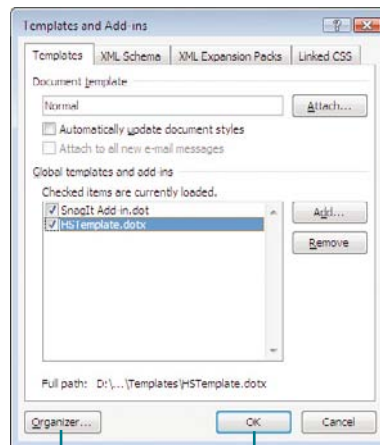
- 1 With one template open, and then click the **Developer** tab.
- 2 Click the **Document Template** button.
- 3 Click **Organizer** on the Templates tab.
- 4 Click a tab on the Organizer dialog box with the part of the template that you want to copy.
- 5 To copy items either to or from a different template, click **Close File**.
- 6 Click **Open File**, and then open the template (or file) you want.
- 7 Click the items you want to copy in either list.
- 8 Click **Copy**.
- 9 When you're done, click **Close**.
- 10 Click **OK**.

### Did You Know?

**Templates can be password protected from unwanted changes.** If the Copy button is unavailable in the Organizer dialog box, check to see if the template has been password protected against tracked changes, comments, or forms. If so, these settings must be changed before the elements can be copied to the template.

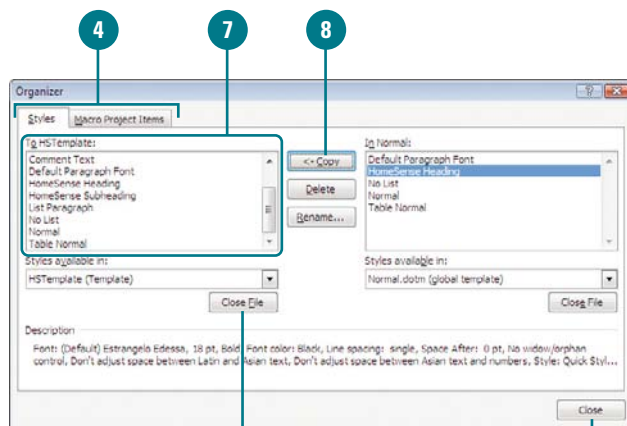
### See Also

See “Setting Developer Options” on page 399 for information on showing the Developer tab.



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# Sending a Document for Review Using E-mail

## Send a Document for Review Using E-mail

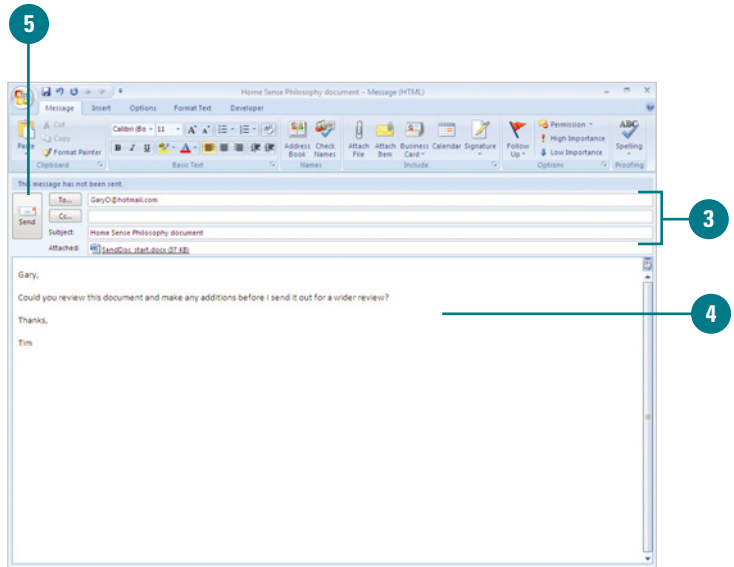
- 1 Click the **Office** button, point to **Send**, and then click **E-mail**.
- 2 If the Compatibility Checker appears, click **Continue** or **Cancel** to stop the operation.

**IMPORTANT** To complete the following steps, you need to have an e-mail program installed on your computer and an e-mail account set-up.

An e-mail message opens in Microsoft Outlook with your document attached. The subject line contains the file name of the document that you are sending.

- 3 Enter your recipients and subject line (appears with document name by default).
  - ◆ To add recipients from your address book or contacts list, click **To**, click the recipient names, click **To**, **Cc**, or **Bcc** until you're done, and then click **OK**.
- 4 Enter a message for your reviewer with instructions.
- 5 Click the **Send** button.

After you finish making changes to a document, you can quickly send it to another person for review using e-mail. Word allows you to send documents out for review as an attachment—either a document, PDF, or XPS document—using e-mail from within the program so that you do not have to open your e-mail program. An e-mail program, such as Microsoft Outlook, needs to be installed on your computer before you begin. When you send your document out for review, reviewers can add comments and then send it back to you.



## Send a Document as a PDF or XPS Using E-mail

1 Click the **Office** button, point to **Send**, and then click **E-mail as PDF Attachment**, or **E-mail as XPS Attachment**.

2 If the Compatibility Checker appears, click **Continue** or **Cancel** to stop the operation.

**IMPORTANT** To complete the following steps, you need to have an e-mail program installed on your computer and an e-mail account set-up.

An e-mail message opens in Microsoft Outlook with your document attached. The subject line contains the file name of the document that you are sending.

3 Enter your recipients and subject line (appears with document name by default).

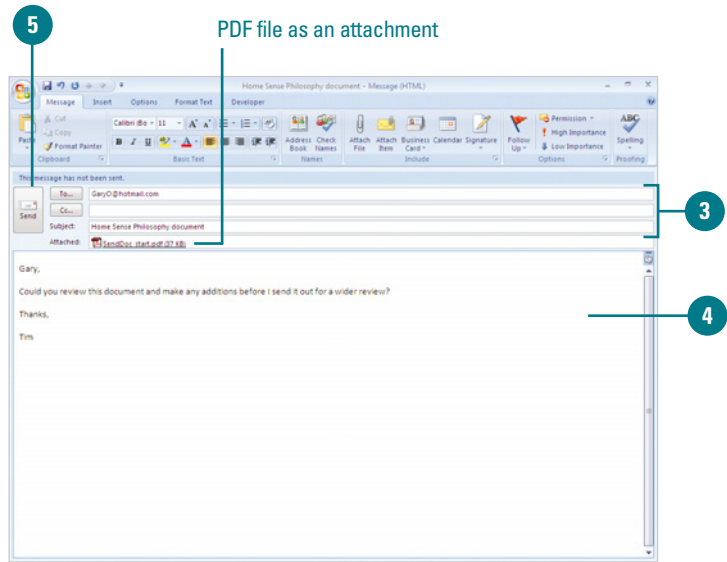
- ◆ To add recipients from your address book or contacts list, click **To**, click the recipient names, click **To**, **Cc**, or **Bcc** until you're done, and then click **OK**.

4 Enter a message for your reviewer with instructions.

5 Click the **Send** button.

### See Also

See "Creating a PDF Document" on page 365 or "Creating an XPS Document" on 366 for information on working with PDF and XPS documents.



# Sending a Document by Internet Fax

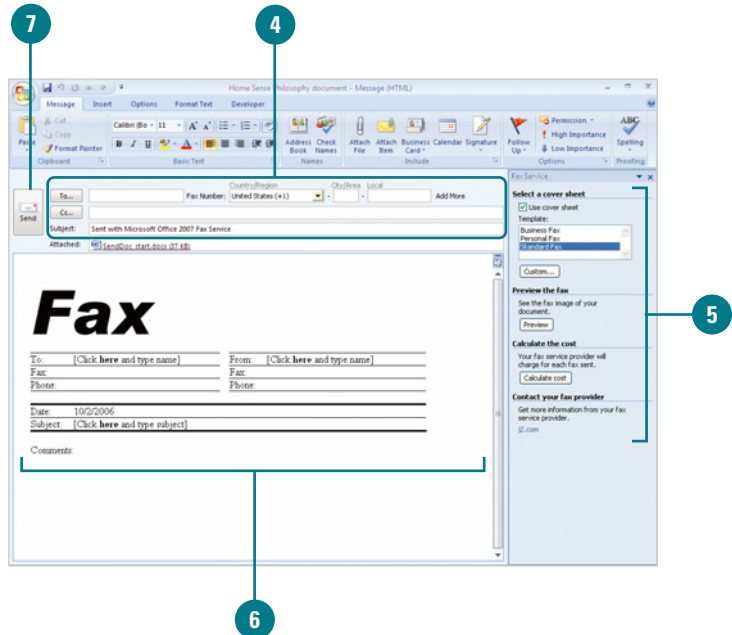
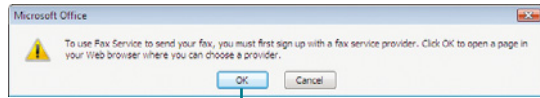
## Send a Document by Internet Fax

- 1 Click the **Office** button, point to **Send**, and then click **Internet Fax**.
- 2 If you're not signed up with an Internet Fax service, click **OK** to open a Web page and sign up for one. When you're done, return to Office, and then repeat Step 1.
- 3 If the Compatibility Checker appears, click **Continue** or **Cancel** to stop the operation.

An e-mail message opens in Microsoft Outlook with your document attached as a .tif (image) file.

- 4 Enter a Fax Recipient, Fax Number and Subject (appears with document name by default).
  - ◆ You can enter a fax number from your address book. Country codes in your address book must begin with a plus sign (+).
  - ◆ To send your fax to multiple recipients, click Add More, and then enter fax information.
- 5 In the Fax Service pane, choose the options you want.
- 6 Complete the cover sheet in the body of the e-mail message.
- 7 Click the **Send** button.

If you are a member of an online fax service—such as eFax, InterFAX, MyFax, or Send2Fax—you can use Office to send and receive faxes over the Internet directly from within Word. If you're not a member, a Web site can help you sign up. You also need to have Microsoft Outlook and Word installed to use the fax service and Outlook must be open to send your fax. If Outlook is not open and you send the fax, it will be stored in your Outbox and not sent until you open Outlook again.



# Sharing Information Between Programs

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# 15

## Introduction

Microsoft Office Word 2007 has the power and flexibility to share information between programs. You can create, store, and manage information in the program that works best for you, and then move that information to another program. You can also import or export data to and from Word to make your Office documents be the best they can be.

Completing a successful project in Word is not always a solitary venture; sometimes you may need to share data with others or obtain data from other programs. In many offices, your co-workers (and their computers) are located across the country or around the world. You can merge information from different programs into a single document, and you can link data between programs.

**XML (Extensible Markup Language)** is a universal language that enables you to create documents in which data is stored independently of the format so you can use the data more seamlessly in other forms. You can work with the familiar Office interface and create and save documents as XML, without ever knowing the language. You can also attach a Word XML Schema or XML Schema (created by a developer)—a set of rules that defines the elements and content used in an XML document—and validate the data against it. Word allows you to open, view, modify, and save XML files and data.

You can create one seamless document that includes data from several programs. You can include Excel data, PowerPoint slides, or an Access database into your document. The ability to copy data from Excel and create a chart using Excel to embed and display the information in a chart are all features that help make Word a useful tool when creating more technical documents. Word also allows you to save a document as an XPS or PDF file (**New!**), which are secure fixed-layout formats you can send to others.

## What You'll Do

**Share Information Between Programs**

**Export and Import Files**

**Link and Embed Files**

**Create an XML Document**

**Work with XML Data**

**Create a Word Document with Excel Data**

**Create a Presentation with Word Text**

**Use an Access Database to Create Word Documents**

**Create a Word Outline from a Presentation**

**Create a PDF Document**

**Create an XPS Document**

# Sharing Information Between Programs

Office can convert data or text from one format to another using a technology known as **object linking and embedding** (OLE). OLE allows you to move text or data between programs in much the same way as you move them within a program. The familiar cut and paste or drag and drop methods work between programs and documents just as they do within a document. In addition, all Office programs have special ways to move information from one program to another, including importing, exporting, embedding, linking, and hyperlinking.

## Importing and Exporting

Importing and exporting information are two sides of the same coin. **Importing** copies a file created with the same or another program into your open file. The information becomes part of your open file, just as if you created it in that format. Some formatting and program-specific information such as formulas may be lost. **Exporting** converts a copy of your open file into the file type of another program. In other words, importing brings information into your open document, while exporting moves information from your open document into another program file.

## Embedding

**Embedding** inserts a copy of a file created in one program into a file created in another program. Unlike imported files, you can edit the information in embedded files with the same commands and toolbar buttons used to create the original file. The original file is called the **source file**, while the file in which it is embedded is called the **destination file**.

Any changes you make to an embedded object appear only in the destination file; the source file remains unchanged.

## Linking

**Linking** displays information from one file (the source file) in a file created in another program (the destination file). You can view and edit the linked object from either the source file or the destination file. The changes are stored in the source file but also appear in the destination file. As you work, Office updates the linked object to ensure you always have the most current information. Office keeps track of all the drive, folder, and file name information for a source file. However, if you move or rename the source file, the link between files will break.

Once the link is broken, the information in the destination file becomes embedded rather than linked. In other words, changes to one copy of the file will no longer affect the other.

### Embedding and Linking

Term	Definition
Source program	The program that created the original object
Source file	The file that contains the original object
Destination program	The program that created the document into which you are inserting the object
Destination file	The file into which you are inserting the object

## Hyperlinking

The newest way to share information between programs is hyperlinks—a term borrowed from Web technology. A **hyperlink** is an object (either colored, underlined text or a graphic) that you click to jump to a different location in the same document or a different document. (See “Creating Hyperlinks” on page 288 and “Using and Removing Hyperlinks” on page 292 for more information about creating and navigating hyperlinks in Microsoft Office Word 2007 documents.)

## Deciding Which Method to Use

With all these different methods for sharing information between programs to choose from, sometimes it is hard to decide which method to use. To decide which method is best for your situation, answer the following questions:

- 1 Do you want the contents of another file displayed in the open document?
  - ◆ **No.** Create a hyperlink. See “Creating Hyperlinks” on page 288.
  - ◆ **Yes.** Go to question 2.
- 2 Do you want to edit the content of the file from within the open document?
  - ◆ **No.** Embed the file as a picture. See “Embedding and Linking Files” on page 352.
  - ◆ **Yes.** Go to question 3.
- 3 Is the source program (the program used to create the file) available on your computer?
  - ◆ **No.** Import the file. See “Exporting and Importing Data” on page 350.
  - ◆ **Yes.** Go to question 4.
- 4 Do you want to use the source program commands to edit the file?
  - ◆ **No.** Import the file. See “Exporting and Importing Data” on page 350.
  - ◆ **Yes.** Go to question 5.
- 5 Do you want changes you make to the file to appear in the source file (the original copy of the file)?
  - ◆ **No.** Embed the file. See “Embedding and Linking Files” on page 352.
  - ◆ **Yes.** Link the file. See “Embedding and Linking Files” on page 352.

# Exporting and Importing Data



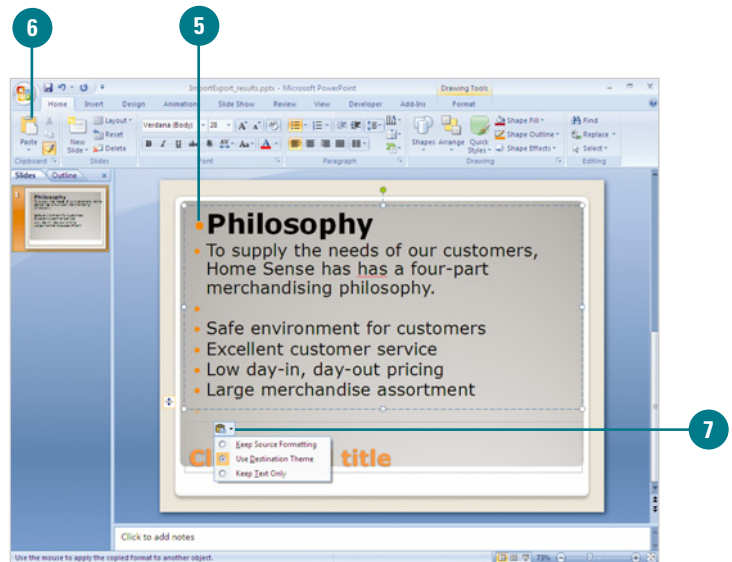
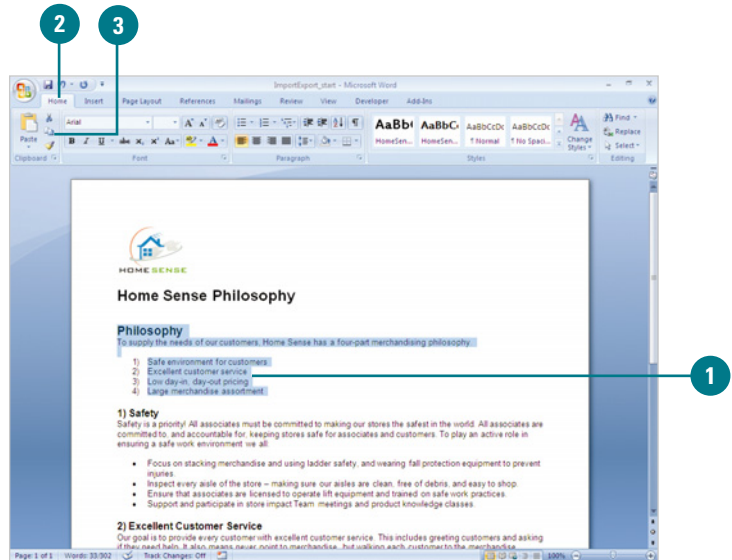
## Import or Export Data Using Copy and Paste

- 1 Select the text or other element that you want to copy.
- 2 Click the **Home** tab.
- 3 Click the **Copy** button.
- 4 Open the destination file, or click the program's taskbar button if the program is already open.
- 5 Select the location where you want the data to be copied.
- 6 Click the **Paste** button.
- 7 Click the **Paste Options** button, and then click the option you want.

### Did You Know?

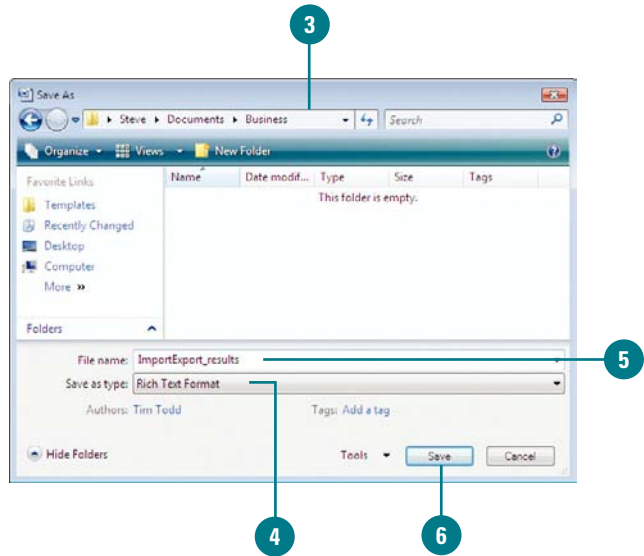
**You can link a file in Word.** If you start to import a file into Word, you can link it instead. Click the Insert tab, click Object button arrow, click Text from File, select the file to link, click the Insert button arrow, and then click Insert as Link.

When you **export** data, you save an open document in a new format so that it can be opened in an entirely different program. When you **import** data, you insert a copy of a file (from the same or another program) into an open document. You can insert into a Word document a bookmarked section of a Word document or a specific range in an Excel worksheet. For example, you might import an Excel worksheet into a Word document to create a one-page report with text and a table. Or you might want to export a document as a Web page or export text as XML data or in the standard Rich Text Format to use in another program.



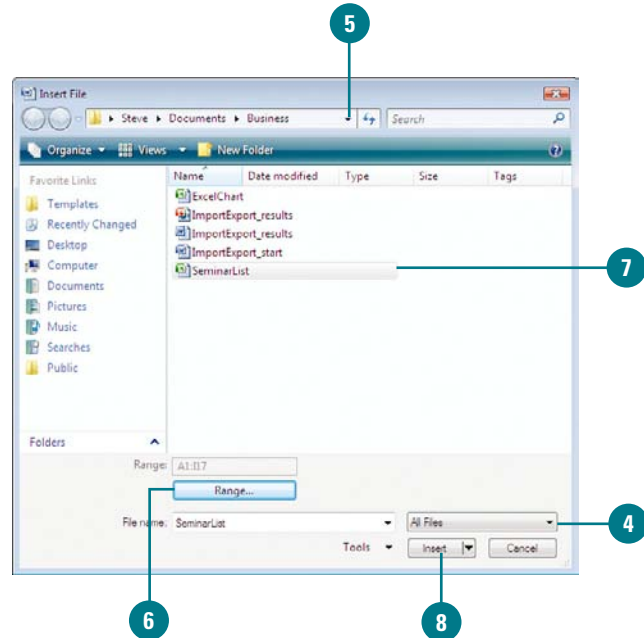
## Export a File to Another Program Format

- 1 Open the file from which you want to export data.
- 2 Click the **Office** button, click **Save As**, and then click **Other Formats**.
- 3 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 4 Click the **Save as type** list arrow, and then click the format you want.
- 5 If you want, change the file name.
- 6 Click **Save**.



## Import a File

- 1 Click where you want to insert the imported file.
- 2 Click the **Insert** tab.
- 3 Click the **Object** button arrow, and then click **Text from File**.
- 4 Click the **Files of type** list arrow, and then click **Text Files**.
- 5 Click the **Look in** list arrow, and then select the folder where the text file is located.
- 6 To import part of a Word document or range from Excel, click **Range**, enter a bookmark name or range, and then click **OK**.
- 7 Click the text file you want to import.
- 8 Click **Insert**.



# Linking and Embedding Files

## Create a Link to Another File Using Paste Special

- 1 Open the source file and any files containing information you want to link.
- 2 Select the information in the source file.
- 3 Click the **Home** tab.
- 4 Click the **Copy** button.
- 5 Click the insertion point in the file containing the link.
- 6 Click the **Paste** button arrow, and then click **Paste Special**.
- 7 Click the **Paste Link** option, and then select the object format you want to use.
- 8 Click **OK**.

### Did You Know?

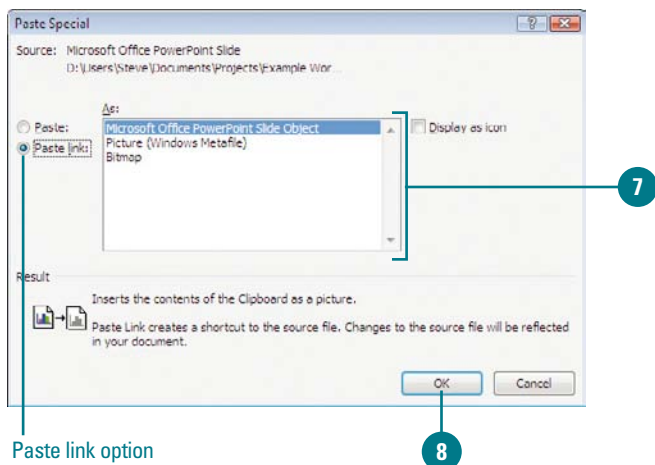
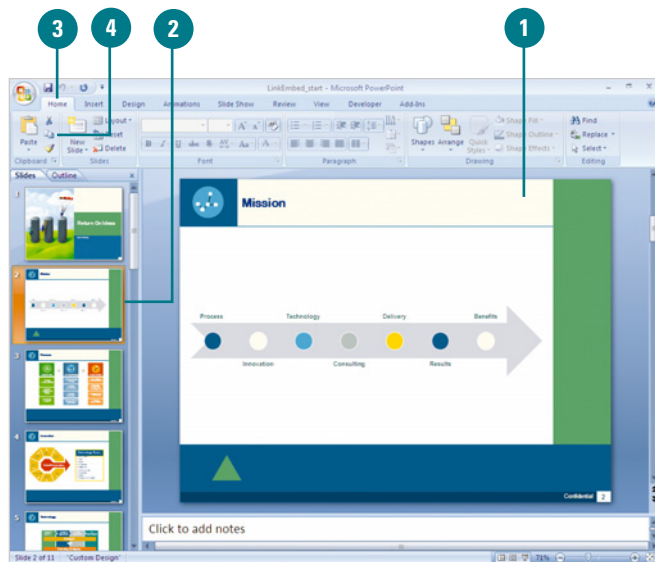
#### **You can edit an embedded object.**

Edit an embedded object only if the program that created it is installed on your computer.

#### **You can manually update or break an object link.**

Click the Office button, point to Prepare, click Edit Links to Files, click the link you want to update, then click Manual update. To break a link, click Break Link.

**Embedding** inserts a copy of one document into another. When data is embedded, you can edit it using the menus and toolbars of the program in which it was created (that is, the **source program**). **Linking** displays information stored in one document (the **source file**) into another (the **destination file**). You can edit the linked object from either file, although changes are stored in the source file. For example, you might link an Excel chart or a PowerPoint slide to a Word document so you can update the chart or slide from any of the files. If you break the link between a linked object and its source file, the object becomes embedded. You can use the Object button on the Insert tab to modify a link.

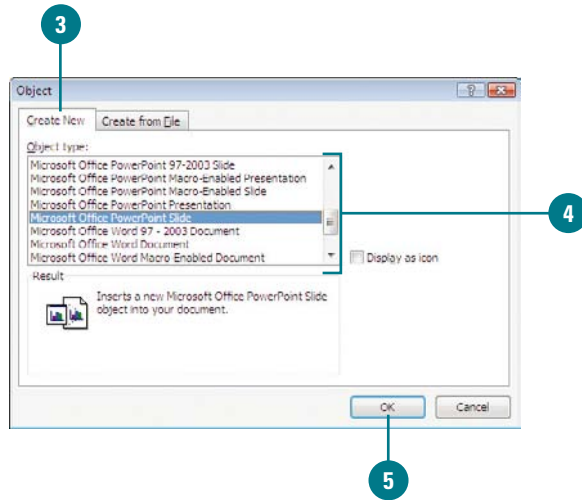


Paste link option

## Embed a New Object

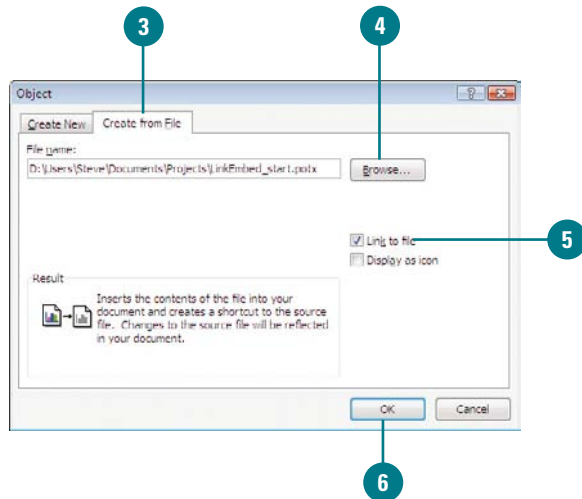
- 1 Click the **Insert** tab.
- 2 Click **Insert Object** button.
- 3 Click the **Create New** tab.
- 4 Click the object type you want to insert.
- 5 Click **OK**.
- 6 Follow the necessary steps to insert the object.

The steps will vary depending on the object type.



## Embed or Link to an Existing Object

- 1 Click the **Insert** tab.
- 2 Click **Insert Object** button.
- 3 Click the **Create from File** tab.
- 4 Click **Browse**, locate and select the file that you want to link, and then click **Open**.
- 5 To create a link to the object, select the **Link to file** check box.
- 6 Click **OK**.



### Did You Know?

**You can update links each time you open a linked document.** When you open a document that contains links, a warning dialog box opens asking you if you want to update all linked information (click Yes) or to keep the existing information (click No).

# Creating an XML Document

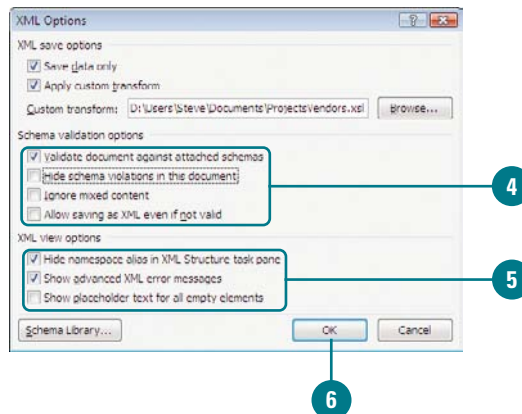
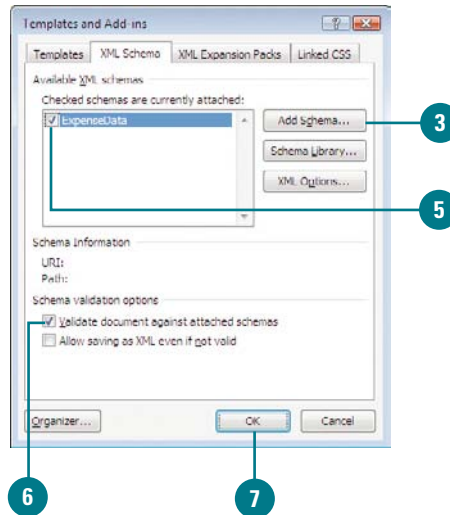
## Attach or Separate a Schema

- 1 Click the **Developer** tab.
- 2 Click the **Schema** button.
- 3 Click **Add Schema**.
- 4 Locate and select the XML schema file you want to attach, and then click **Open**.
- 5 Select or clear a schema to attach or separate it.
- 6 Select the **Validate document against attached schemas** check box to validate the document.
- 7 Click **OK**.

## Change XML Options

- 1 Click the **Developer** tab.
- 2 Click the **Schema** button.
- 3 Click **XML Options**.
- 4 Select or clear the check boxes for the validation options.
- 5 Select or clear the check boxes for the view options.
- 6 Click **OK**, and then click **OK** again.

**XML (Extensible Markup Language)** is a universal language that enables you to create documents in which data is stored independently of the format so you can use the data more seamlessly in other forms. XML is fully supported in Microsoft Office Word. XML allows you to work with the familiar Office interface and create and save documents as XML, without ever knowing the XML language. When you work with XML, you can attach a Word XML Schema or XML Schema (created by a developer)—a set of rules that defines the elements and content used in an XML document—and validate the data against it. Word allows you to open, view, modify, and save XML files and data.



## Open, View, and Modify an XML Data File

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **Files of type** list arrow, and then click **XML Files**.
- 3 Locate the XML file you want to open.
- 4 Select the XML file.
- 5 Click **Open**.
- 6 To show XML tags, select the **Show XML tags in the document** check box.
- 7 To add an XML tag, select the content you want to tag, and then click an element tag in the XML Structure task pane.
- 8 As necessary, double-click an XML tag to select its contents, and then use common editing techniques to move, copy, and delete it.
- 9 When you're done, click the **Close** button on the task pane.

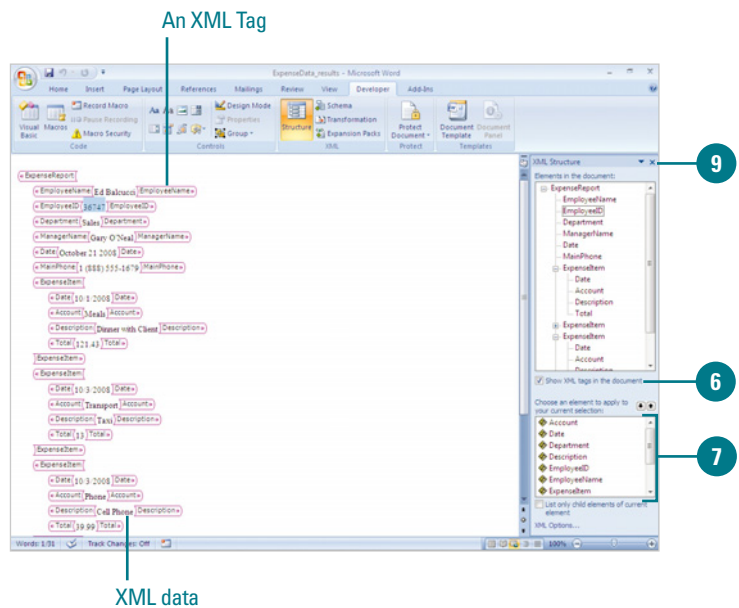
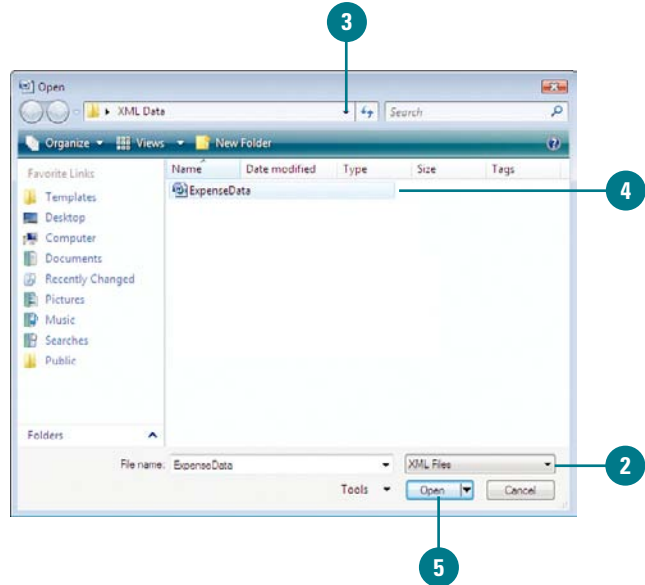
### Did You Know?

*You can remove an XML tag quickly.*

Point to the start or end of the tag name, right-click the tag, and then click *Remove Tag Name* tag.

*You can locate XML problems quickly.*

If the structure of the document violates the rules of the schema, a purple wavy line marks the document location.

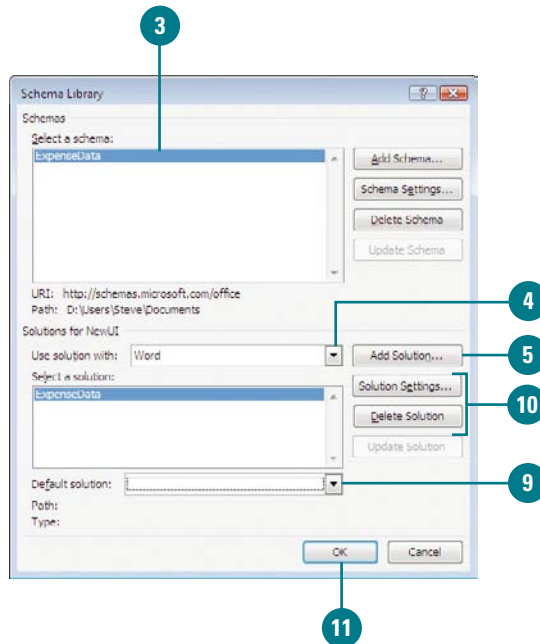


# Working with XML Data

## Associate or Modify an XML Transformation with a Schema

- 1 Click the **Developer** tab.
- 2 Click the **Schema Library** button.
- 3 Click the schema you want to associate a transformation file (XSLT) with.
- 4 Click the **Use solution with** list arrow, and then click **Word**.
- 5 Click **Add Solution**.
- 6 Locate and select the XSLT file, and then click **Open**.
- 7 Type a name for the XSLT file, and then select the options you want.
- 8 Click **OK**.
- 9 Click the **Default solution** list arrow, and then click the default transform you want.
- 10 To delete a solution or update settings, select the solution, and then click **Delete Solutions** or **Solution Settings**.
- 11 Click **OK**, and then click **OK** again.

The **Schema Library** is a place to manage XML schemas. When you add a schema to the Schema Library, you create a namespace for any XML document in which the schema is attached. A namespace provides a unique identifier for elements defined by a schema. A namespace can also associate other XML related files, such as an XML Transformations file, to the XML document. An **XML Transformations file (XSLT)** is used to save and transform XML documents into other types of documents, such as HTML or XML, in different views. In the Schema Library, you can add, delete, update, and modify schemas and solutions, which are the files associated with the schema, such as XSLT. For example, you can add friendly names (aliases) to schemas and any files associated with the schema. You can add more than one schema to a single document. Word applies both sets of rules and alerts you of any conflicts.



## Save an XML Document and Apply a Transformation

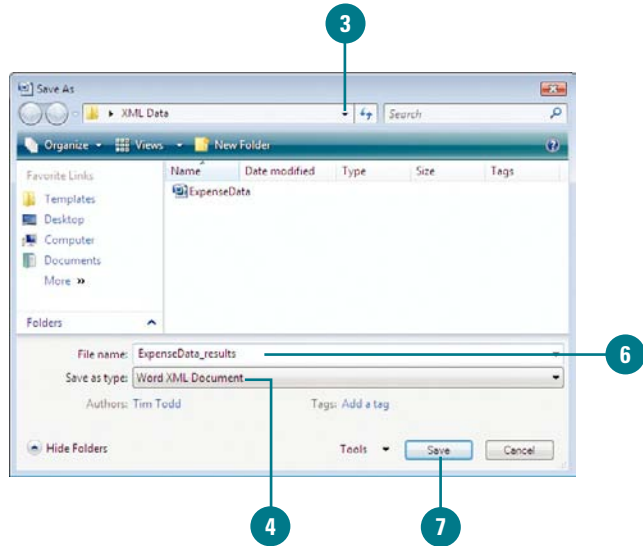
- 1 Open the document you want to save as an XML document.
- 2 Click the **Office** menu, and then click **Save As**.
- 3 Select a location where you want to save the XML data.
- 4 Click the **Save as type** list arrow, and then click **Word XML Document** or **Word 2003 XML Document**.
- 5 For a Word 2003 XML Document, select the **Save data only** check box to save only XML data (disregard Word formatting). To apply a transformation, select the **Apply transform** check box, click **Transform**, select a transformation file (XSLT), and then click **Open**.
- 6 Type a name for the XML document.
- 7 Click **Save**.

### Did You Know?

**You can insert XML data.** Place the insertion point where you want to insert the data, click the Insert tab, click the Object button arrow, click Text from File, click the Files of type list arrow, click XML Files, locate and select the XML file, and then click Insert.

### See Also

See “Using Content Control to Create Form Documents” on page 410 for information on mapping XML data to content controls.



# Creating a Word Document with Excel Data

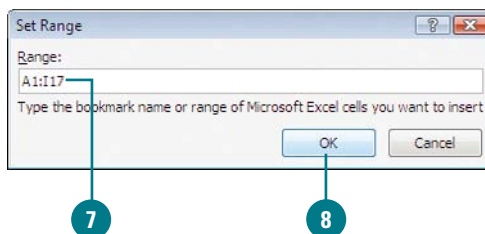
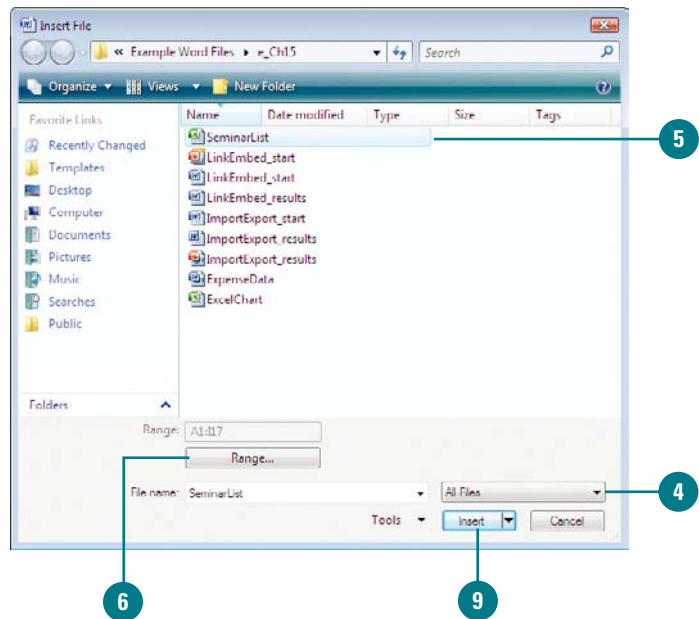
## Insert an Excel Worksheet Range to a Word Document

- 1 Click in the Word document where you want to copy the Excel range.
- 2 Click the **Insert** tab.
- 3 Click the **Object** button arrow, and then click **Text from File**.
- 4 Click the **Files of type** list arrow, and then click **All Files**.
- 5 Locate and select the file name of the workbook you want to copy.
- 6 Click **Range**.
- 7 Specify the range you want.
- 8 Click **OK**.
- 9 Click **Insert**.

### Did You Know?

*You can name a range to make it easier to use in Word.* If you plan to insert part of an Excel worksheet in a Word document, name the range. This is easier to recall than the specific cell references. Check Help in Microsoft Excel for details.

A common pairing of Office programs combines Word and Excel. As you write a sales report, explain a budget, or create a memo showing distribution of sales, you often want to add existing spreadsheet data and charts to your text. Instead of re-creating the Excel data in Word, you can insert all or part of the data or chart into your Word document. You can use the Object button on the Insert tab or copy and paste the information from Excel into Word. The Paste Special command allows you to specify how you want to paste external information into Word. After you insert data or a chart into your word document, you can double-click the embedded Excel object to modify the data or chart.

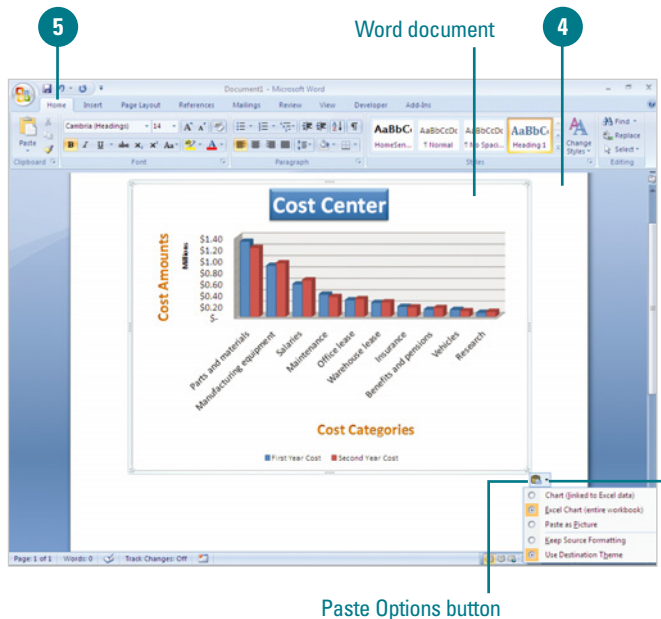
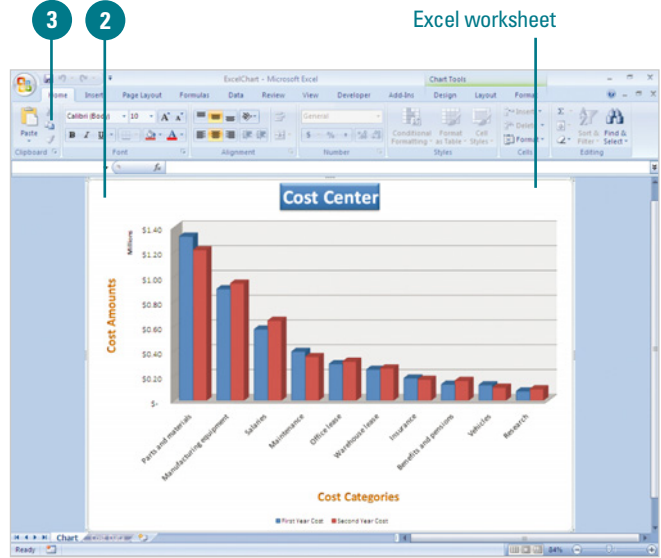


## Copy Data from Excel

- 1 Open both the Word document and the Excel worksheet that contain the data you want to create a linked object or embedded object from.
- 2 Switch to Excel, and then select the entire worksheet, a range of cells, or the chart you want.
- 3 Click the **Home** tab, and then click the **Copy** button.
- 4 Switch to the Word document, and then click where you want the information to appear.
- 5 Click the **Home** tab.
- 6 Use either of the following methods.
  - ◆ **Paste.** Click the **Paste** button, click the **Paste Options** button, and then select the option you want.
  - ◆ **Paste Special.** Click the **Paste** button arrow, click **Paste Special**, click **Microsoft Office Excel Worksheet Object**, and then click **OK**.

### Did You Know?

**You can import Excel data as a picture.** To save disk space, you can insert Excel data as a picture. Data inserted this way becomes a table that you cannot edit. Select the data you want to import, click the Copy button on the Home tab. Click in the Word document where you want to insert the picture, click the Paste button on the Home tab, click the Paste Options button, and then click Paste as Picture. Drag the picture to a new location, or drag its resize handles to enlarge or shrink it.



# Creating a Presentation with Word Text

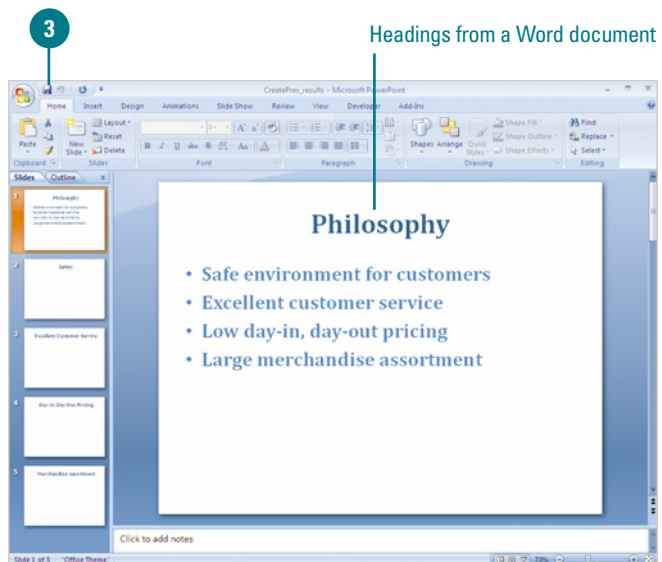
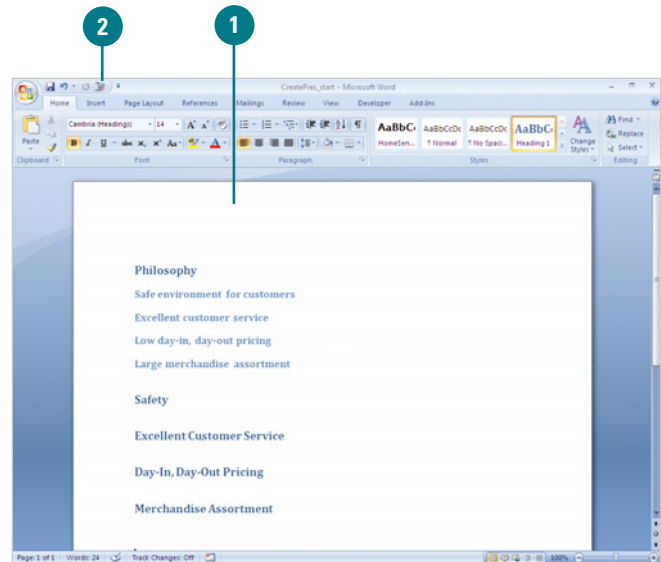
## Create PowerPoint Slides from a Word Document

- 1 Open or create a Word document with heading styles.
- 2 Click the **Send to Microsoft Office PowerPoint** button on the Quick Access Toolbar.
  - ◆ The Send to Microsoft Office PowerPoint button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.

PowerPoint opens; each Heading 1 style text becomes the title of a new slide and Heading 2 style text becomes top-level bullets on a slide, and so forth.

- 3 Save the presentation, and then edit it by adding slides, changing slide layouts, and applying a design template.

PowerPoint presentations are based on outlines, which you can create using either PowerPoint, or the more extensive outlining tools in Word. You can import any Word document into PowerPoint, although only paragraphs tagged with heading styles become part of the slides. Each Heading 1 style in a Word document becomes the title of a separate PowerPoint slide. Heading 2 becomes the first level of indented text, and so on. If a document contains no styles, PowerPoint uses the paragraph indents to determine a slide structure. You can edit the slides using the usual PowerPoint commands. You can also copy any table you created in Word to a PowerPoint slide.

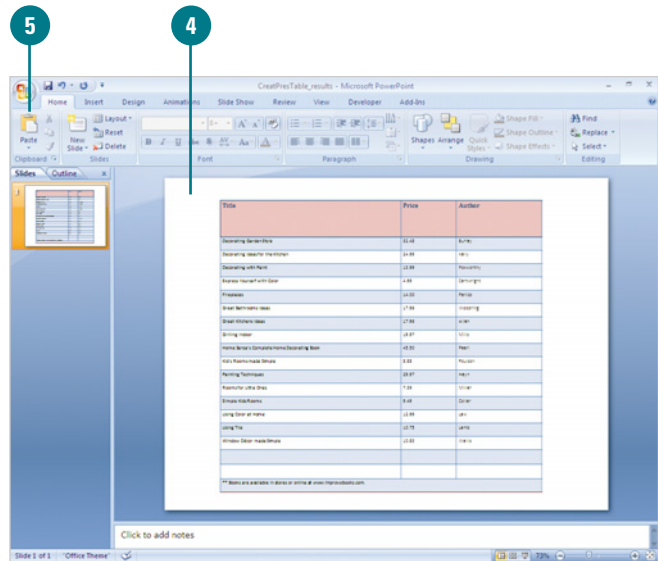
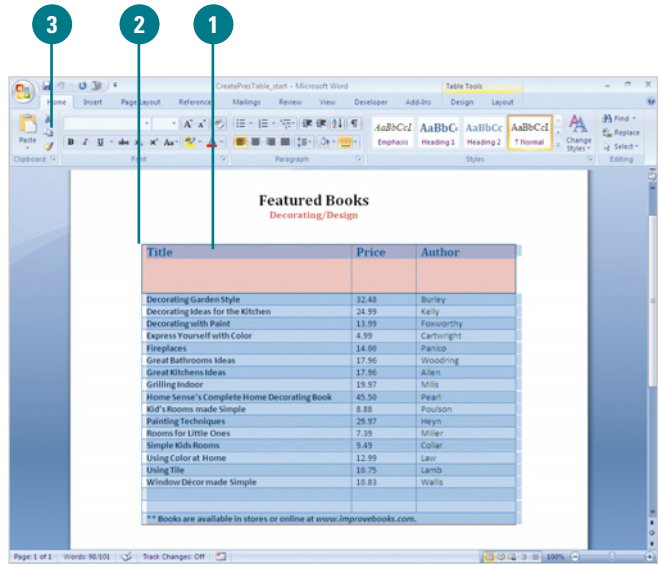


## Embed a Word Table in a Slide

- 1 Click in the Word table you want to use in a slide.
- 2 Click the table selection box (small black box in the upper-left corner of the table).
- 3 Click the **Home** tab, and then click the **Copy** button.
- 4 Click the PowerPoint slide where you want to insert the Word table.
- 5 Click the **Home** tab, and then click the **Paste** button.

### Did You Know?

*You can create slides from a Word outline and insert them into an existing PowerPoint presentation.* In PowerPoint, display the slide after which you want to insert the new slides. Click the Home tab, click the New Slide button arrow, click Slides from Outline, and then select the Word document you want.



# Using an Access Database to Create Word Documents

## Insert Access Data into a Word Document

1 In Access, click the table or query in the Navigation pane that you want to insert in a Word document.

**IMPORTANT** *The database cannot be in exclusive mode.*

2 Click the **External Data** tab.

3 Click the **More** button, and then click **Merge it with Microsoft Office Word**.

4 Click the export options you want to use.

5 Click **OK**.

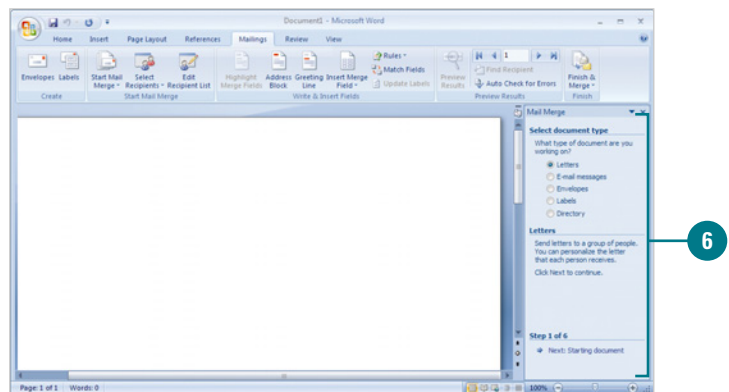
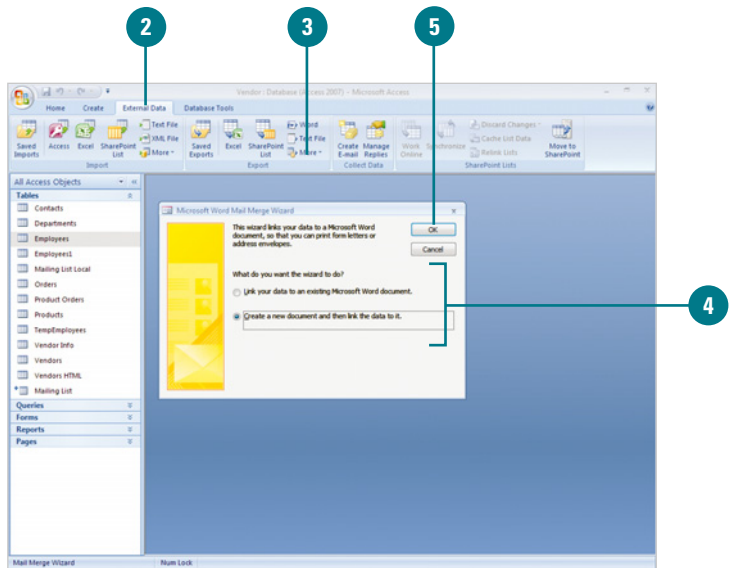
If you selected the option for linking to an existing Word document, open the document.

6 In Word, follow the step-by-step instructions in the Mail Merge task pane to create a letter or mailing list using the data from Access.

### See Also

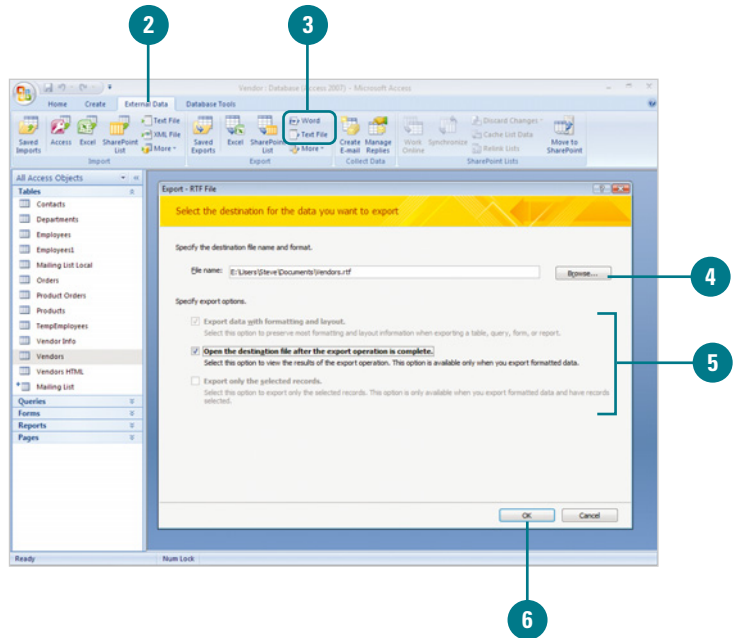
See "Creating a Form Letter" on page 248 for information on using the Mail Merge task pane.

Access is a great program for storing and categorizing large amounts of information. You can combine, or **merge**, database records with Word documents to create tables or produce form letters and envelopes based on names, addresses, and other Access records. For example, you might create a form letter in Word and personalize it with an Access database of names and addresses. Word uses the Mail Merge task pane to step you through the process. Mail merge is the process of combining names and addresses stored in a data file with a main document (usually a form letter) to produce customized documents.

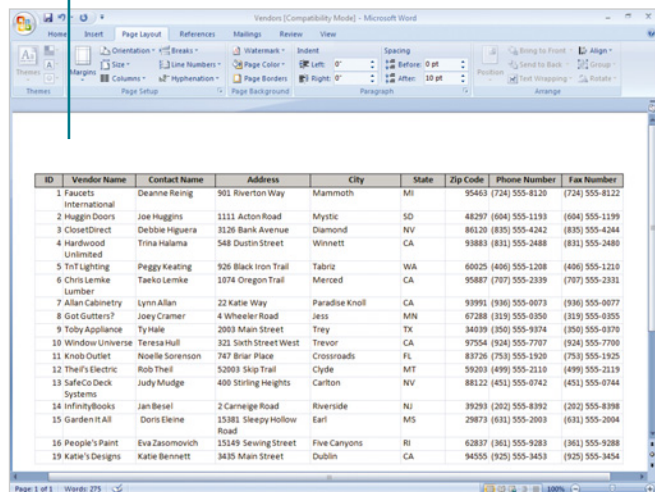


## Create a Word Document from an Access Database

- 1 In Access, click the table, query, report, or form in the Navigation pane that you want to save as a Word document.
  - 2 Click the **External Data** tab.
  - 3 Click the **Export to RTF File (.rtf file)** or **Export to Text File (.txt file)** button.
  - 4 Click **Browse**, select a location, enter a name, and then click **Save**.
  - 5 Click the export options you want to use.
  - 6 Click **OK**.
- Word opens and displays the document.
- 7 Edit the document using Word commands and features.



### Access data in a Word document



### Did You Know?

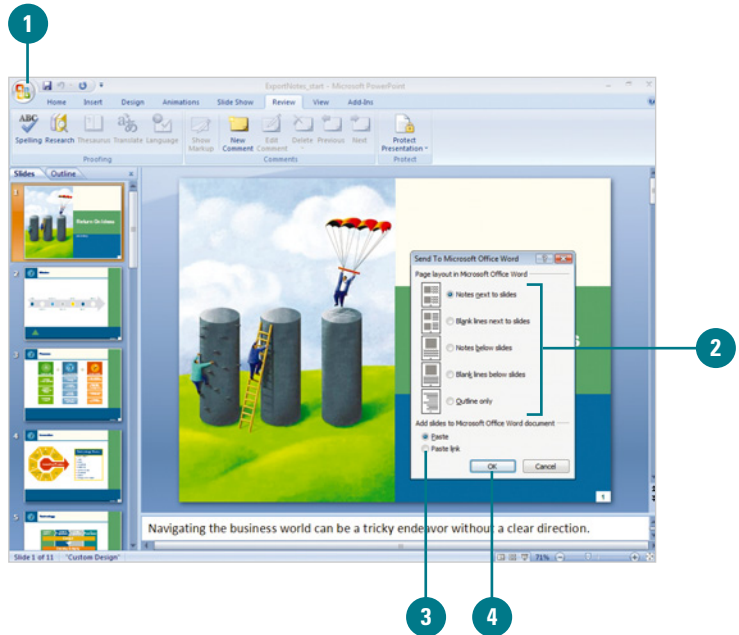
**You can save in Rich Text Format.** A Rich Text Format file (.rtf) retains formatting, such as fonts and styles, and can be opened from Word or other word processing or desktop publishing programs.

# Creating a Word Outline from a Presentation

## Create a Word Document from a PowerPoint Presentation

- 1 In PowerPoint, click the **Office** button, point to **Publish**, and then click **Create Handouts in Microsoft Office Word**.
  - 2 Click the page layout option you want for handouts.
  - 3 To create a link to the presentation, click the **Paste Link** option.
  - 4 Click **OK**.
- Word starts, creates a new document, and inserts your presentation slides with the page layout you selected.
- 5 Print the document in Word, editing and saving it as necessary.
  - 6 When you're done, click the **Close** button to quit Word.

You can send both your notes and slides to Word so that you can use a full array of word processing tools. This is especially handy when you are developing more detailed materials, such as training presentations and manuals. By default, PowerPoint pastes the presentation into the Word document. If you change the presentation after sending it to Word, the changes you make to the presentation are not reflected in the Word document. If you click the Paste Link option in the Send To Microsoft Office Word dialog box, however, you create a link between the Word document and the presentation, so that changes you make in one are reflected in the other.



# Creating a PDF Document

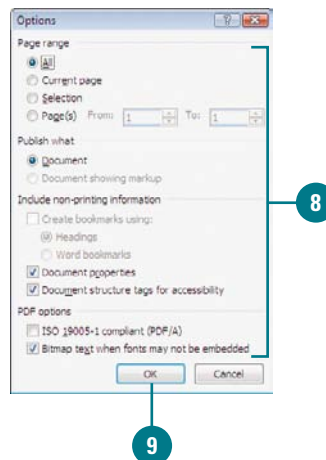
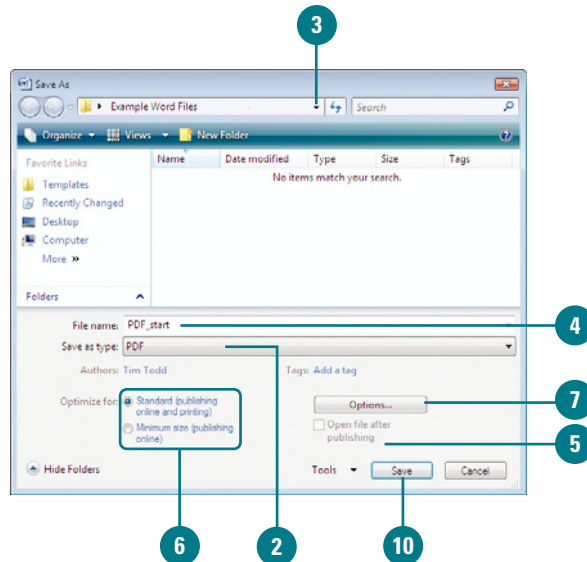
Microsoft  
Certified  
Application  
Specialist

WD07S-6.1.1

## Save an Office Document as a PDF Document

- 1 Click the **Office** button, point to **Save As**, and then click **PDF or XPS**.
- 2 Click the **Save as type** list arrow, and then click **PDF**.
- 3 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 4 Type a PDF file name.
- 5 To open the file in Adobe Reader after saving, select the **Open file after publishing** check box.
- 6 Click the **Standard** or **Minimize size** option to specify how you want to optimize the file.
- 7 Click **Options**.
- 8 Select the publishing options you want, such as what to publish, range to publish, whether to include non-printing information, or PDF options.
- 9 Click **OK**.
- 10 Click **Save**.
- 11 If necessary, install Adobe Acrobat Reader and related software as directed.

**Portable Document Format (PDF)** is a fixed-layout format developed by Adobe Systems that retains the form you intended on a computer monitor or printer. A PDF is useful when you want to create a document primarily intended to be read and printed, not modified. Office allows you to save a document as a PDF file (**New!**), which you can send to others for review in an e-mail. To view a PDF file, you need to have Acrobat Reader—free downloadable software from Adobe Systems—installed on your computer. If the PDF or XPS command is not available on the Save As submenu, you'll need to download and install the Publish as PDF or XPS add-in for Microsoft Office 2007 from the Microsoft Web site.



# Creating an XPS Document

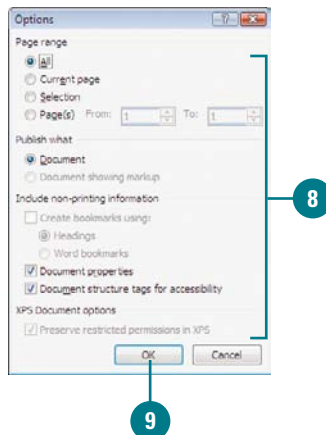
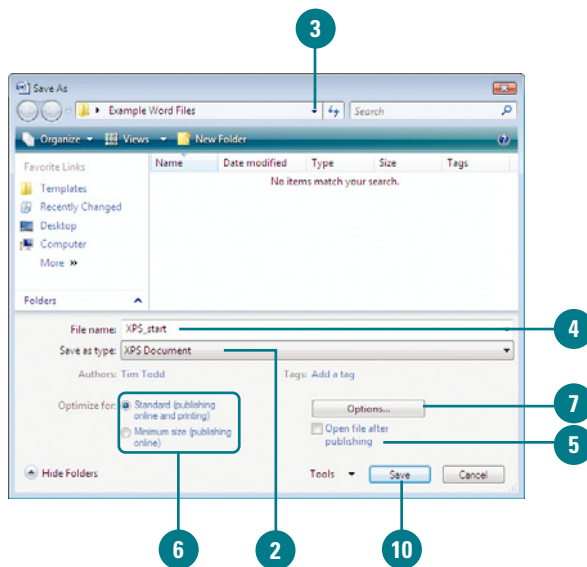
Microsoft  
Certified  
Application  
Specialist

WD07S-6.1.1

## Save an Office Document as an XPS Document

- 1 Click the **Office** button, point to **Save As**, and then click **PDF or XPS**.
- 2 Click the **Save as type** list arrow, and then click **XPS Document**.
- 3 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 4 Type an XPS file name.
- 5 To open the file in viewer after saving, select the **Open file after publishing** check box.
- 6 Click the **Standard** or **Minimize size** option to specify how you want to optimize the file.
- 7 Click **Options**.
- 8 Select the publishing options you want, such as what to publish, range to publish, whether to include non-printing information, or XPS options.
- 9 Click **OK**.
- 10 Click **Save**.
- 11 If necessary, click **Install** to download and install the Microsoft .NET Framework.

**XML Paper Specification (XPS)** is a secure fixed-layout format developed by Microsoft that retains the form you intended on a monitor or printer. An XPS is useful when you want to create a document primarily intended to be read and printed, not modified. Office allows you to save a document as an XPS file (**New!**), which you can send to others for review in an e-mail. XPS includes support for digital signatures and is compatible with Windows Rights Management for additional protection. The XPS format also preserves live links with documents, making files fully functional. To view an XPS file, you need to have a viewer—free downloadable software from Microsoft Office Online—installed on your computer. If the PDF or XPS command is not available on the Save As submenu, you'll need to download and install the Publish as PDF or XPS add-in for Microsoft Office 2007 from the Microsoft Web site.



# Customizing Word

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## Introduction

Once you've become familiar with Microsoft Office Word and all its features, you might want to customize the way you work with Word. You can change your view settings so that your Word window looks the way you want it to. Word comes with set defaults—such as showing the vertical ruler, or how many files you've recently opened—which you can change to suit your needs.

Some of the other Word customization features allow you to set a default font and related attributes to use when you are typing text in text boxes. Other defaults might be the color or line style of a shape object that you create. You can change the location of the Ribbon and the configuration of the Quick Access Toolbar to include commands not available on the Ribbon.

When you want to scan one or more documents or faxes and recognize the text using an Optical Character Recognition (OCR), Microsoft Office Document Scanning and Document Imaging gives you the tools you need to quickly and easily scan and recognize text for use in Word. All you need is compatible scanner hardware.

When you need to manage all the pictures on your computer, Microsoft Office Picture gives you a flexible way to organize, edit, and share your pictures. With Picture Manager, you can view all the pictures on your computer no matter where you store them. If you need to edit a picture, you can use Picture Manager to remove red eye and to change brightness, contrast, and color. You can also crop, rotate and flip, resize, and compress a picture.

## What You'll Do

**Set Popular Word Options**

**Set Page Display Options**

**Set Display Options**

**Set Print Options**

**Set Editing Options**

**Change Default Text and Page Settings**

**Set Advanced Save Options**

**Set Advanced General Options**

**Set Compatibility Options**

**Change Advanced Document Properties**

**Customize the Way You Create Objects**

**Access Commands Not in the Ribbon**

**Use Multiple Languages**

**Scan and Image Documents**

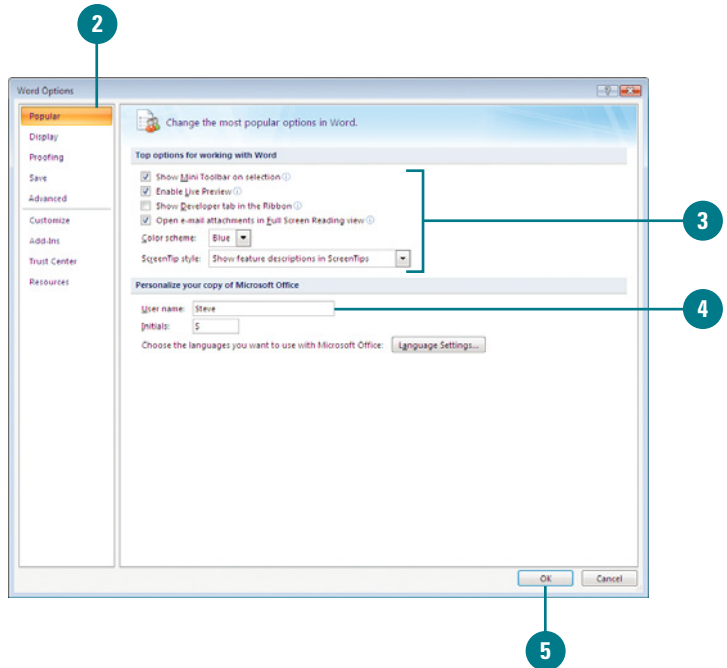
**Manage Pictures**

# Setting Popular Word Options

## Change Popular Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Popular**.
- 3 Select the Top options for working with Word you want:
  - ◆ **Show Mini Toolbar on Selection (New!).** Select to show a miniature semi-transparent toolbar that helps you work with selected text.
  - ◆ **Enable Live Preview (New!).** Select to show preview changes in a document.
  - ◆ **Show Developer tab in the Ribbon (New!).** Select to access developer controls, write code, or create macros.
  - ◆ **Open e-mail attachments in Full Screen Reading view (New!).** Select to use Full Screen Reading view or clear to use Print Layout view.
  - ◆ **Color Scheme (New!).** Click the list arrow to select a Windows related color scheme.
  - ◆ **ScreenTip style (New!).** Click the list arrow to select a screentip option: Show enhanced ScreenTips, Don't show enhanced ScreenTips, or Don't show ScreenTips.
- 4 Type your name and initials as you want them to appear in Properties, and review comments.
- 5 Click **OK**.

You can customize the performance of many Word features including its editing, saving, spelling, viewing, printing and security procedures. Each person uses Word in a different way. Word Options allows you to change popular options to personalize what appears in the Word window (**New!**). When you change these options, Word uses them for all subsequent Word sessions until you change them again.

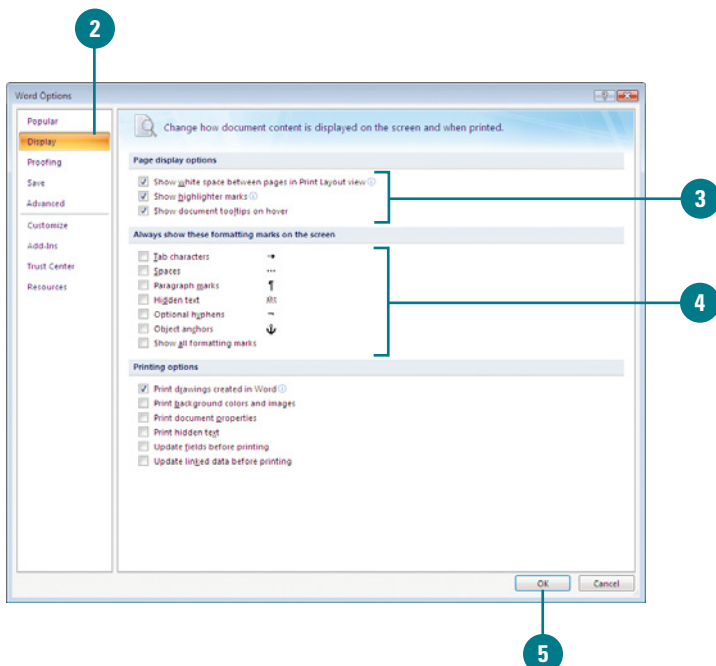


# Setting Page Display Options

## Change Page Display Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Display**.
- 3 Select or clear any of the check boxes to change the display options you want.
  - ◆ **Show white space between pages in Print Layout view.** Select to display top and bottom margins. (Default on).
  - ◆ **Show highlighter marks.** Select to display highlighted text on the screen and in print. (Default on).
  - ◆ **Show document tooltips on hover.** Select to display information when you point to a hyperlink or reviewer's comment. (Default on).
- 4 Select or clear any of the check boxes to display or hide the formatting marks you want.
  - ◆ **Tab characters, Spaces, Paragraph marks, Hidden text, Optional hyphens, or Object anchors.** (Default off).
  - ◆ **Show all formatting marks.** (Default off).
- 5 Click **OK**.

Sometimes it's hard to determine whether a blank is a tab or space. You can set options on the Display pane in the Word Options to show or hide formatting marks. Formatting marks help you see characters that are not visible, such as tabs, spaces, paragraph marks, and hidden text. You can also set page display that show white space between pages in Print Layout view, show highlighted text on the screen and in print, or show tooltip information when you point to a hyperlink or reviewer's comment.

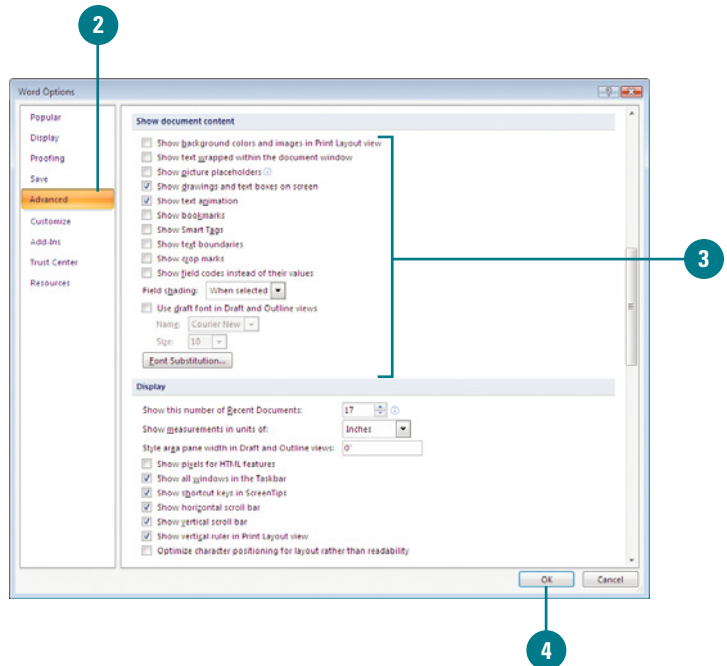


# Setting Display Options

## Change Display View Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Select or clear any of the check boxes to change the display view options you want.
  - ◆ **Show background colors and images in Print Layout view.** (Default off).
  - ◆ **Show text wrapped within the document window.** (Default off).
  - ◆ **Show picture placeholders.** Shows empty boxes; speeds up the display. (Default off).
  - ◆ **Show drawings and text boxes on screen.** (Default on).
  - ◆ **Show text animation.** (Default on).
  - ◆ **Show bookmarks.** (Default on).
  - ◆ **Show Smart Tags.** (Default on).
  - ◆ **Show text boundaries.** Shows dotted lines. (Default on).
  - ◆ **Show crop marks.** Shows corner of margins. (Default off).
  - ◆ **Show field codes instead of their values.** (Default off).
  - ◆ **Use draft font in Draft and Outline views.** (Default off).
- 4 Click **OK**.

Word uses unique characters and formatting to display specialized document elements, such as bookmarks, crop marks, smart tags, text boundaries and wrapping, and background colors and images. You can set options on the Advanced pane in Word Options to show or hide these elements when you work on a document. In addition, you can also show or hide Word window elements, such as scroll bars, shortcut keys, and the vertical ruler. If you want to change the number of recent documents shown on the Office menu or the units of measurement used in a document, you can set the options on the Advanced pane.



## Change Display Options

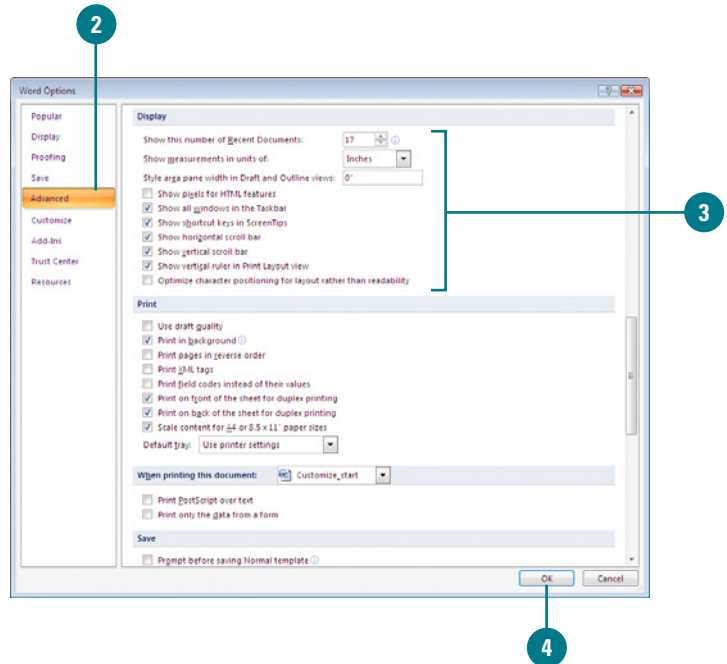
1 Click the **Office** button, and then click **Word Options**.

2 In the left pane, click **Advanced**.

3 Select or clear any of the check boxes to change the display options you want.

- ◆ **Show this number of Recent Documents.** Set to 0 to turn off the recent documents display. (Default is 4).
- ◆ **Show measurements in units of.** Set ruler units. (Default is Inches).
- ◆ **Show pixels for HTML features.** Uses pixels as the unit of measurement for HTML features. (Default on).
- ◆ **Show all windows in the Taskbar.** Select to show each document window on the taskbar. (Default on).
- ◆ **Show shortcut keys in ScreenTips.** (Default on).
- ◆ **Show horizontal scroll bar.** (Default on).
- ◆ **Show vertical scroll bar.** (Default on).
- ◆ **Show vertical ruler in Print Layout view.** (Default on).
- ◆ **Optimize character positioning for layout rather than readability.** Select to optimize for printing. (Default off)

4 Click **OK**.

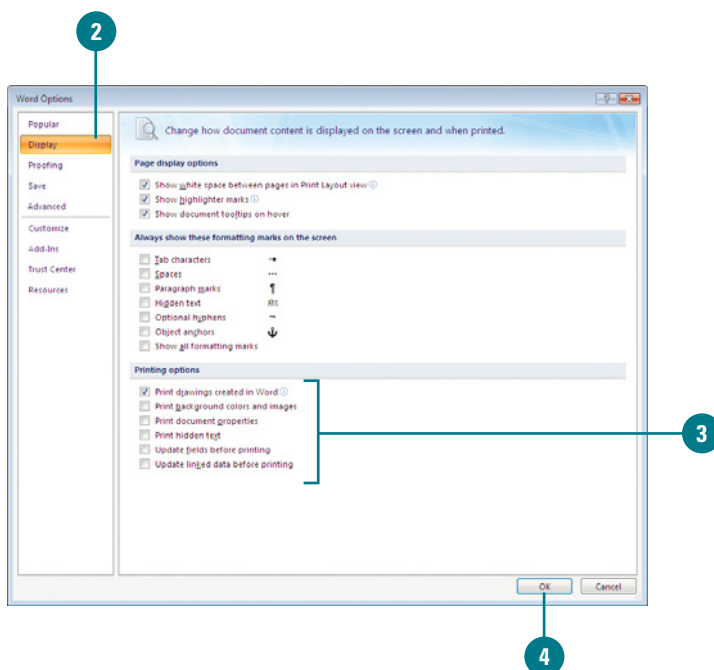


# Setting Print Options

## Change Print Display Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Display**.
- 3 Select or clear any of the check boxes to change the print display options you want.
  - ◆ **Print drawings created in Word.** Clear to speed up the process. (Default on).
  - ◆ **Print background colors and images.** Clear to speed up the process. (Default off).
  - ◆ **Print document properties.** Select to print document summary information. (Default off).
  - ◆ **Print hidden text.** Select to print text marked as hidden without the dotted lines. (Default off).
  - ◆ **Update fields before printing.** (Default off).
  - ◆ **Update linked data before printing.** (Default on).
- 4 Click **OK**.

If your document contains a lot of graphics, colors, and drawings, it could slow down the printing process. While you're working on the document, you can turn off options to speed up the printing process. When you're ready to print the final version, you can turn the options back on. If you have marked text in the document as hidden, you can turn on the Print hidden text option to print it. You can also set options to print on both sides of a page (known as duplex printing) and select the default paper tray you like to use.



## Change Print Options

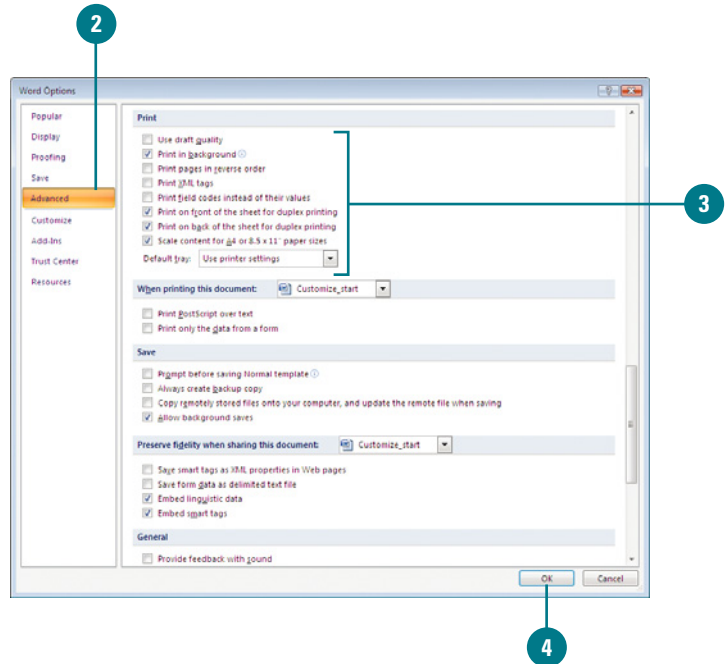
1 Click the **Office** button, and then click **Word Options**.

2 In the left pane, click **Advanced**.

3 Select or clear any of the check boxes to change the print options you want.

- ◆ **Use draft quality.** Select for documents with minimal formatting. (Default on).
- ◆ **Print in background.** Set to print while you continue to work. (Default on).
- ◆ **Print pages in reverse order.** (Default off).
- ◆ **Print XML tags.** Select when a Schema is attached to the document. (Default off).
- ◆ **Print field codes instead of their values.** (Default off).
- ◆ **Print on front of the sheet for duplex printing.** Prints in reverse order, so you can flip and print on the back. (Default off).
- ◆ **Print on back of the sheet for duplex printing.** Prints in ascending order so you can print on the front in reverse order. (Default off).
- ◆ **Scale content for A4 or 8.5 x 11" paper sizes.** (Default on).
- ◆ **Default tray.** Select the printer tray you want. (Default is Use printer settings).

4 Click **OK**.

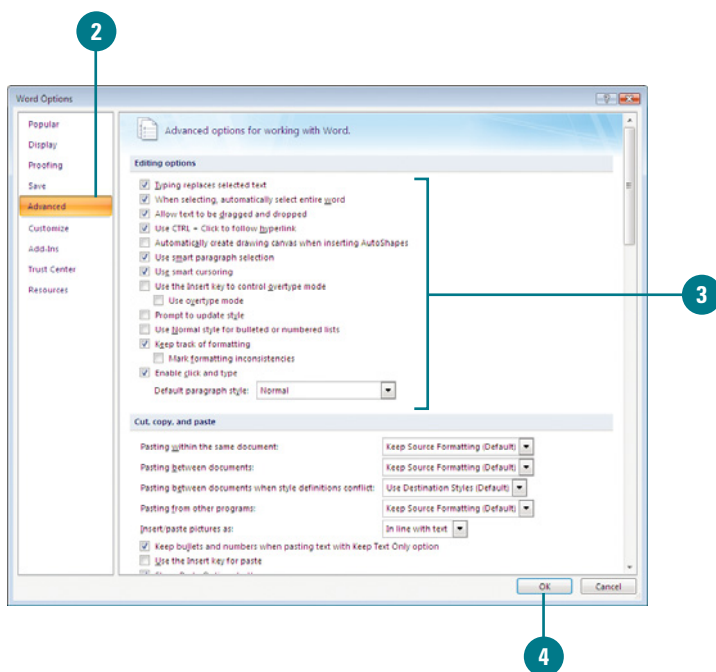


# Setting Editing Options

## Change Editing Options

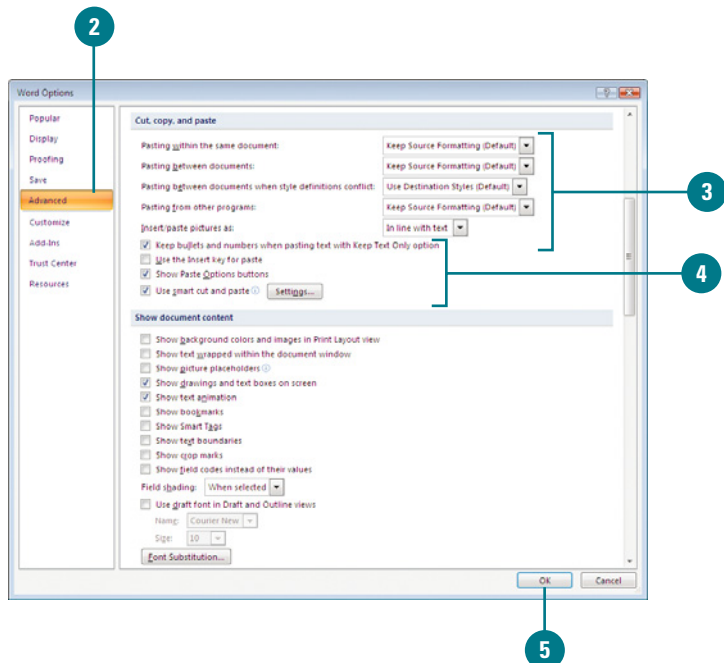
- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Select or clear any of the check boxes to change the options you want, some options include:
  - ◆ **Typing replaces selected text.** (Default on).
  - ◆ **When selecting, automatically select entire word.** (Default on).
  - ◆ **Allow text to be dragged and dropped.** (Default on).
  - ◆ **Use CTRL+ Click to follow hyperlink.** (Default on).
  - ◆ **Automatically create drawing canvas when inserting AutoShapes.** (Default off).
  - ◆ **Use smart paragraph selection.** (Default on).
  - ◆ **Use smart cursoring.** (Default on).
  - ◆ **Use the Insert key to control overtype mode.** (Default off).
  - ◆ **Prompt to update style.** (Default off).
  - ◆ **Use Normal style for bulleted or numbered lists.** (Default off).
  - ◆ **Enable click and type.** Select a default paragraph style. (Default on and Normal).
- 4 Click **OK**.

If you spend a lot of time modifying documents, you can set editing options in Word to customize the way you work. You can set options to automatically select entire words, use smart paragraph selection (includes the paragraph mark), allow text to be dragged and dropped, and identify formatting inconsistencies, and keep track of formatting. You can also set cutting, copying, and pasting options to specify formatting preferences when you paste text and graphics. Editing options are available on the Advanced pane in Word Options.



## Change Cut, Copy, and Paste Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Click the list arrow next to any of the following, and then select the option you want:
  - ◆ **Pasting within the same document.** (Default: Keep Source Formatting).
  - ◆ **Pasting between documents.** (Default: Keep Source Formatting).
  - ◆ **Pasting between documents when style definitions conflict.** (Default: Use Destination Styles).
  - ◆ **Pasting from other programs.** (Default: Keep Source Formatting).
  - ◆ **Insert/paste pictures as.** (Default: In line with text).
- 4 Select or clear any of the check boxes to change the options you want, some options include:
  - ◆ **Keep bullets and numbers when pasting text with Keep Text Only option.** (Default on).
  - ◆ **Use the Insert Key for paste.** (Default off).
  - ◆ **Show Paste Options buttons.** (Default on).
  - ◆ **Use smart cut and paste.** (Default on).
- 5 Click **OK**.

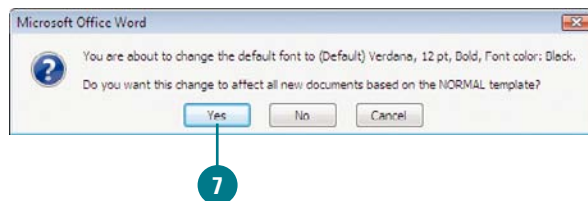
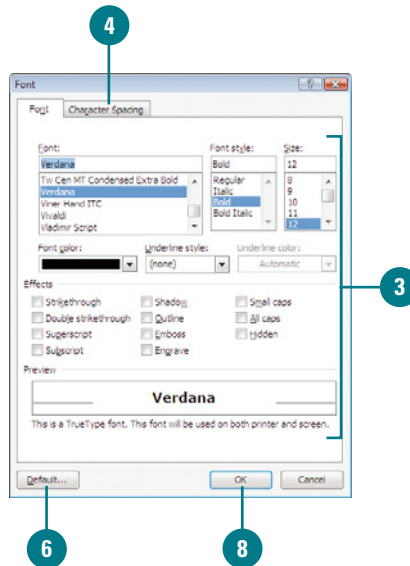


# Changing Default Text and Page Settings

## Change Default Text and Character Spacing

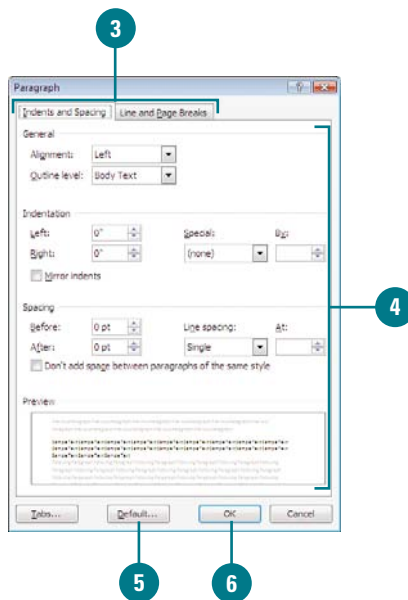
- 1 Click the **Home** tab.
- 2 Click the **Font** Dialog Box Launcher.
- 3 Change the font options to what you want to be the default.
- 4 Click the **Character Spacing** tab.
- 5 Change the character spacing options to what you want to be the default.
- 6 Click **Default**.
- 7 Click **Yes** to confirm the change.
- 8 Click **OK**.

When you type text in a document, Word applies a set of default text font and paragraph attributes. Some examples of Word's font default settings include font style, size, and formatting options, such as bold, italic, and underline. Some paragraph examples include alignment, indents, and spacing. You might find that having your own personalized font style and color, indent, and spacing settings would really make your documents more custom. In the same way, you can also set default page options—such as margins, paper sizes, and layout—for a new document. To find out the current default settings for your document, you can open a new document, and then type some text.



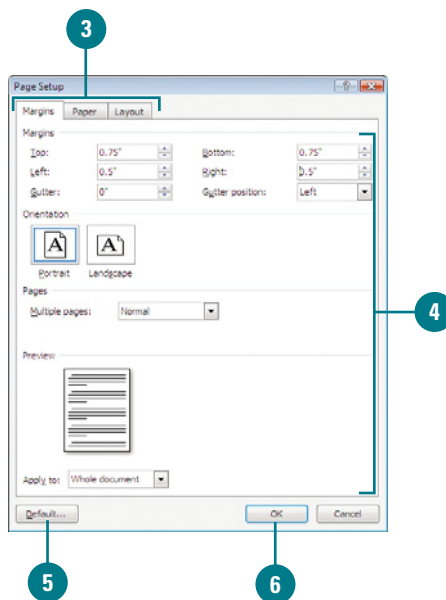
## Change Default Paragraph Text

- 1 Click the **Home** tab.
- 2 Click the **Font** Dialog Box Launcher.
- 3 Click the **Indents and Spacing** or **Line and Page Break** tab.
- 4 Change the paragraph options to what you want to be the default.
- 5 Click **Default**, and then click **Yes**.
- 6 Click **OK**.



## Change Default Page Setup

- 1 Click the **Page Layout** tab.
- 2 Click the **Page Setup** Dialog Box Launcher.
- 3 Click the **Margins, Paper, or Layout** tab.
- 4 Change the margin, paper, and layout options to what you want to be the default.
- 5 Click **Default**, and then click **Yes**.
- 6 Click **OK**.

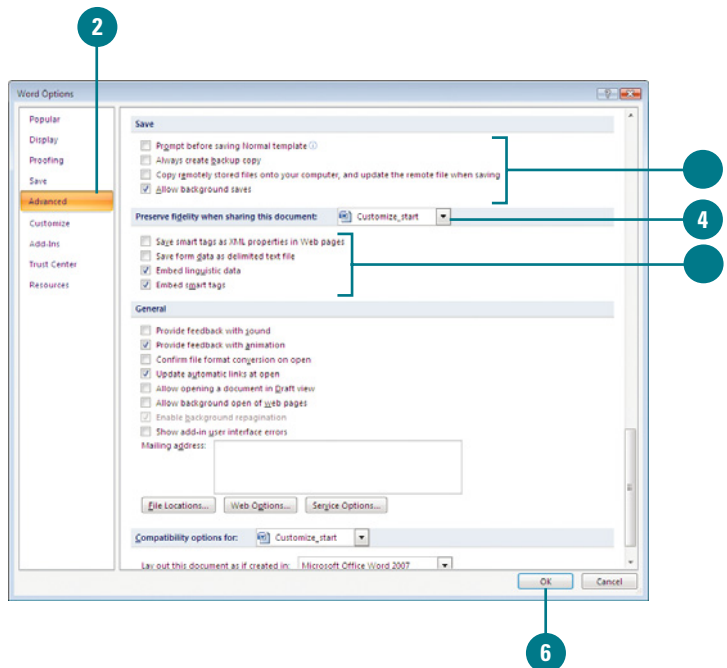


# Setting Advanced Save Options

## Change Advanced Save Options

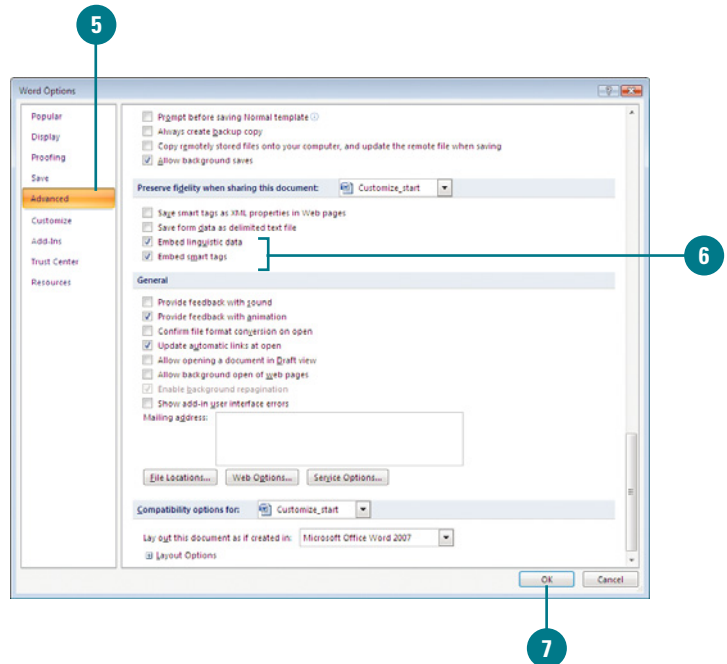
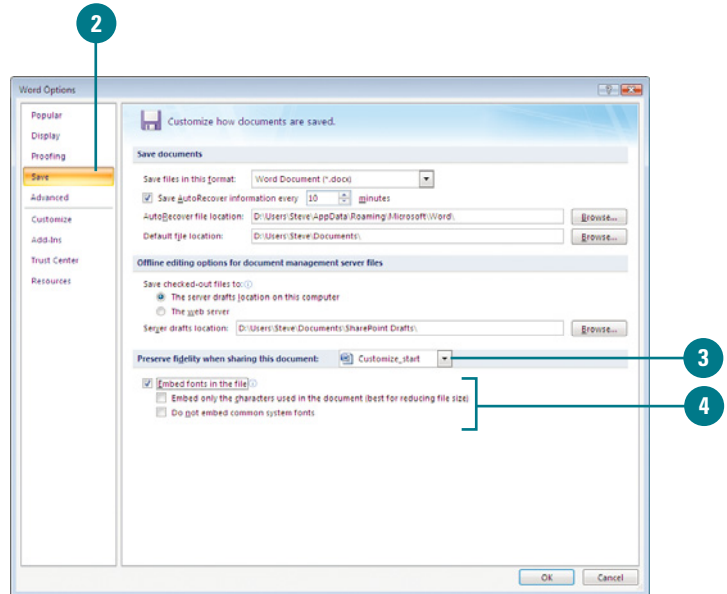
- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Select the save options you want:
  - ◆ **Prompt before saving Normal template.** (Default off).
  - ◆ **Always create backup copy.** (Default off).
  - ◆ **Copy remotely stored files onto your computer, and update the remote file when saving.** (Default off).
  - ◆ **All background saves.** (Default on).
- 4 Click the **Preserve fidelity when sharing this document** list arrow, and then select the document you want to specify options.
- 5 Select the save options you want:
  - ◆ **Save smart tags as XML properties in Web pages.** (Default off).
  - ◆ **Save form data as delimited text file.** (Default off).
- 6 Click **OK**.

In addition to the standard save options on the Save pane in Word Options, you can also set more advanced save options that allow you to automatically create a backup copy of a document, save smart tags, save form data, and update remotely stored files. If you are using non-standard fonts to create a document, you can embed the fonts you use so they “travel” (are saved) with your document. Then, if the computer you use to show or print the document does not have all your document fonts installed, the embedded fonts appear in the document and your document quality will not suffer. When you embed fonts, the size of your document increases.



## Change Embedding Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Save**.
- 3 Click the **Preserve fidelity when sharing this document** list arrow, and then select the document you want to specify options.
- 4 Select the document embedding options you want:
  - ◆ **Embed fonts in the file.** Select to save fonts in a document file. (Default off).
  - ◆ **Embed only the characters used in the document.** Select to save only the fonts you actually use in a document. (Default off).
  - ◆ **Do not embed common system fonts.** Select to reduce file size when you use Windows and Office 2007 fonts. (Default off).
- 5 In the left pane, click **Advanced**.
- 6 Select the document embedding options you want:
  - ◆ **Embed linguistic data.** Select to save speech and handwritten text. (Default on).
  - ◆ **Embed smart tags.** Select to save smart tags. (Default on).
- 7 Click **OK**.

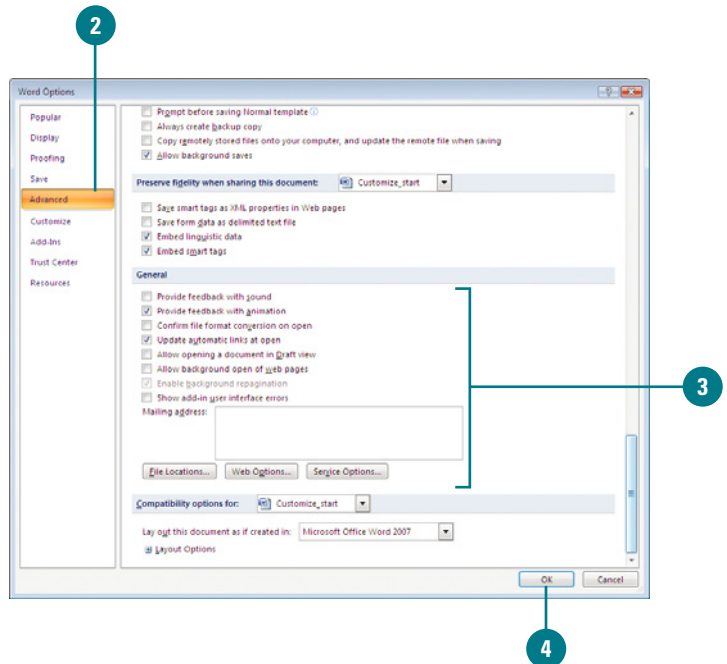


# Setting Advanced General Options

## Change Advanced General Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**.
- 3 Select the general options you want:
  - ◆ **Provide feedback with sound.** (Default off).
  - ◆ **Provide feedback with animation.** (Default on).
  - ◆ **Confirm file format conversion on open.** Select to choose a file converter. (Default off).
  - ◆ **Update automatic links at open.** (Default on).
  - ◆ **Allow opening a document in Draft view.** (Default off).
  - ◆ **Allow background open of web pages.** Select to open Web pages in the background. (Default off).
  - ◆ **Enable background repagination.** Select to repaginate documents as needed. (Default on).
  - ◆ **Show add-in user interface errors.** Select to display alerts for custom interface problems. (Default off).
  - ◆ **Mailing address.** Enter to use as the default return address for envelopes and letters.
- 4 Click **OK**.

In addition to display options, the Advanced pane in Word Options also includes options to provide general user feedback. You can set the feedback options to play sound, show simple animation, show add-in user interface error, or display alerts to update links. You can also set options for default file locations, Web pages, and shared workspaces using the File Locations, Web Options, and Service buttons.



## For Your Information

### Changing Default File Locations

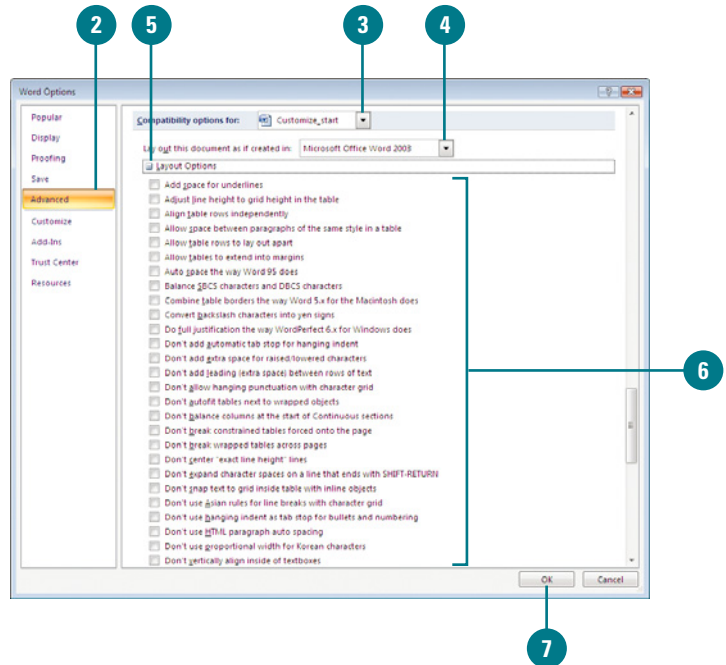
If you always save documents in a specific folder, you can change the default location where documents are saved. You can change the default file location for documents, clip art pictures, user templates, workgroup templates, AutoRecover files, tools, and startup. Unless you fully understand the internal connects between Word and the clip art, tools, and startup folders, you should not change those default file locations. After you make a change, Word uses the new setting for all subsequent Word sessions until you change the setting again. In the Advanced pane of the Word Options dialog box, click File Locations, select the file type you want to change, click Modify, open the new default folder location, click OK, and then click OK.

# Setting Compatibility Options

## Change Compatibility Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Advanced**, and then scroll to the bottom of the dialog box.
- 3 Click the **Compatibility options for list arrow**, and then select the document in which you want to set options.
- 4 Click the **Layout this document as if created in** list arrow, and then select the version of Word you want.
- 5 Click the plus sign (+) next to Layout Options.
- 6 Select or clear the layout check box options in the list.
- 7 Click **OK**.

If you have an older Word or WordPerfect document that doesn't display very well in Word 2007, you can set compatibility options to simulate the layout of an older format to improve the display. Word 2007 provides compatibility for all previous version of Word going back to Word for Windows 1.0 and WordPerfect 5.x. Compatibility options are available on the Advanced pane in Word Options. After you select the layout version you want to use, you click the plus sign (+) to display the long list of compatibility options.

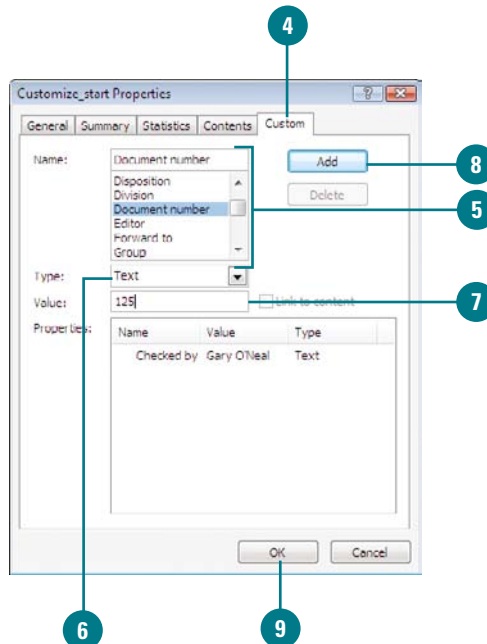
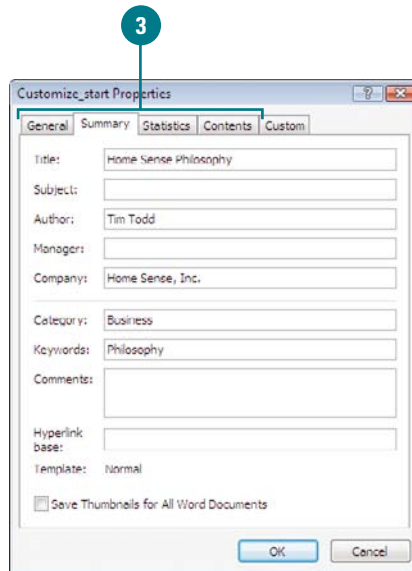


# Changing Advanced Document Properties

## Customize Advanced Properties

- 1 Click the **Office** button, point to **Prepare**, and then click **Properties**.
- 2 Click the arrow next to Document Properties, and then click **Advanced Properties**.
- 3 Click the tabs to view and add information:
  - ◆ **General.** To find out file location or size.
  - ◆ **Summary.** To add title and author information for the document.
  - ◆ **Statistics.** To display the number of slides, paragraphs, words and other details about the document.
  - ◆ **Contents.** To display document contents.
- 4 Click the **Custom** tab.
- 5 Type the name for the custom property or select a name from the list.
- 6 Select the data type for the property you want to add.
- 7 Type a value for the property.
- 8 Click **Add**.
- 9 Click **OK**.

You can use document properties—also known as metadata—to help you manage and track files. Search tools can use the metadata to find a document based on your search criteria, such as title, subject, author, category, keywords, or comments. You can create advanced custom properties to associate more specific criteria for search tools to use. If you associate a document property to an item in the document, the document property updates when you change the item.

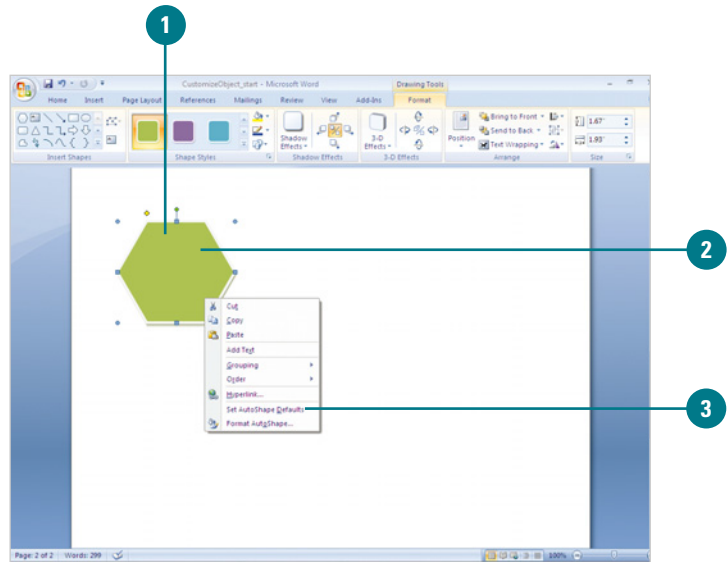


# Customizing the Way You Create Objects

## Customize the Way You Create Shape Objects

- 1 Create a shape.
- 2 Change the shape attributes, including fill color or effect, text color, outline color and style; and font type, style, and size.
- 3 Right-click the shape, and then click **Set AutoShape Defaults**.

When you draw an object, Word applies a set of default object attributes. Examples of object default settings include fill color, shadow, and line style. To find out the current default settings for your document, you can draw an object, or create a text object and check the object's attributes. If you change a default setting, Word will use the new setting for all subsequent Word sessions until you change the setting again.



# Accessing Commands Not in the Ribbon

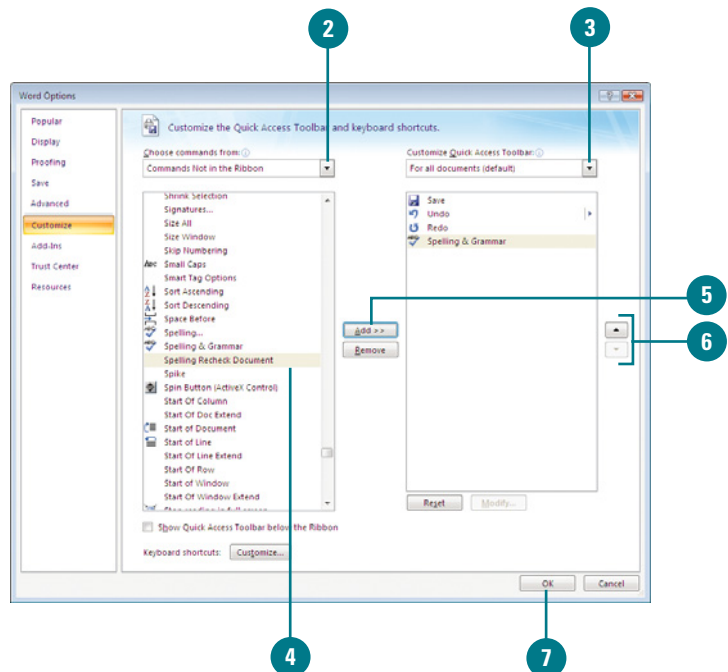
## Add Commands Not in the Ribbon to the Quick Access Toolbar

- 1 Click the **Customize Quick Access Toolbar** list arrow, and then click **More Commands**.
  - 2 Click the **Choose command from list** arrow, and then click **Commands Not in the Ribbon**.
  - 3 Click the **Customize Quick Access Toolbar** list arrow, and then click **For all documents (Default)**.
  - 4 Click the command you want to add (left column).
- TIMESAVER** Click <Separator>, and then click Add to insert a separator line between buttons.
- 5 Click **Add**.
  - 6 Click the **Move Up** and **Move Down** arrow buttons to arrange the commands in the order you want them to appear.
  - 7 Click **OK**.

### Did You Know?

**You can reset the Quick Access Toolbar to its original state.** In the Word Options dialog box, click Customize in the left pane, click Reset, and then click OK.

If you don't see a command in the Ribbon that was available in an earlier version of Word, you might think Microsoft removed it from the product. To see if a command is available, check out the Customize section in Word Options. The Quick Access Toolbar gives access to commands not in the Ribbon (**New!**), which you can add to the toolbar. For example, you can add the following commands: Create Microsoft Office Outlook Task, Replace Fonts, Send to Microsoft Word, and Web Page Preview.



# Using Multiple Languages

## Add a Language to Office Programs

- 1 Click **Start** on the taskbar, point to **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Office 2007 Language Settings**.

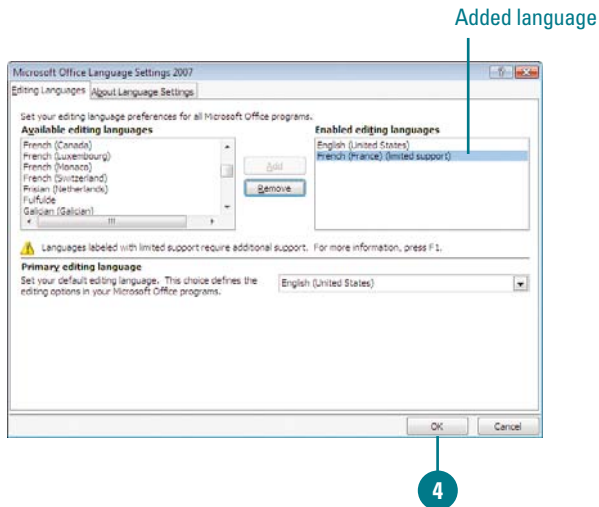
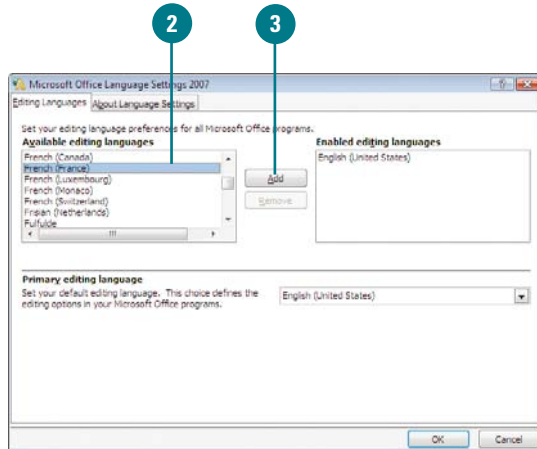
**TIMESAVER** In *Word*, click the *Office* button, click *Word Options*, click *Popular*, and then click *Language Settings*.

- 2 Select the language you want to enable.
- 3 Click **Add**.
- 4 Click **OK**, and then click **Yes** to quit and restart Office.

### Did You Know?

**You can check your keyboard layout.** After you enable editing for another language, such as Hebrew, Cyrillic, or Greek, you might need to install the correct keyboard layout so you can enter characters for that language. In the Control Panel, double-click the Regional And Language icon, click the Language tab, and then click Details to check your keyboard.

International Microsoft Office users can change the language that appears on their screens by changing the default language settings. Users around the world can enter, display, and edit text in all supported languages—including European languages, Japanese, Chinese, Korean, Hebrew, and Arabic—to name a few. You'll probably be able to use Office programs in your native language. If the text in your document is written in more than one language, you can automatically detect languages or designate the language of selected text so the spelling checker uses the right dictionary.



# Scanning and Imaging Documents

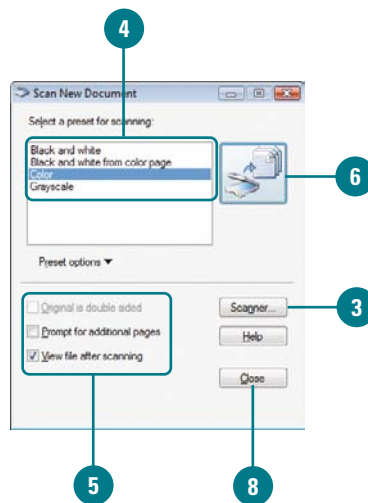
## Scan a Document Image

- 1 Click the **Start** button, point to **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Office Document Imaging**.
- 2 Click the **Scan New Document** button on the toolbar.
- 3 Click **Scanner**, select your scanner hardware, and then click **OK**.
- 4 Click a preset scanning option.
- 5 Click the scanner options you want.
- 6 Click the **Scan** button.
- 7 The document is scanned.
- 8 Click the **Save** button on the toolbar, specify a name and location, and then click **Save**.
- 9 When you're done, click **Close**.

### Did You Know?

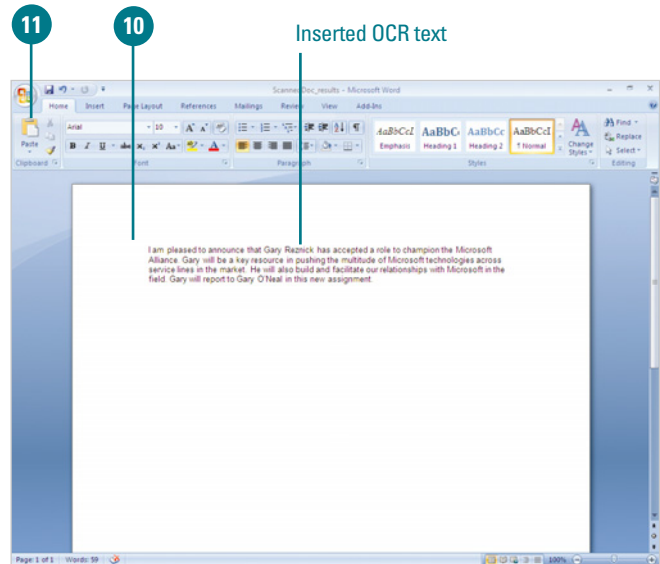
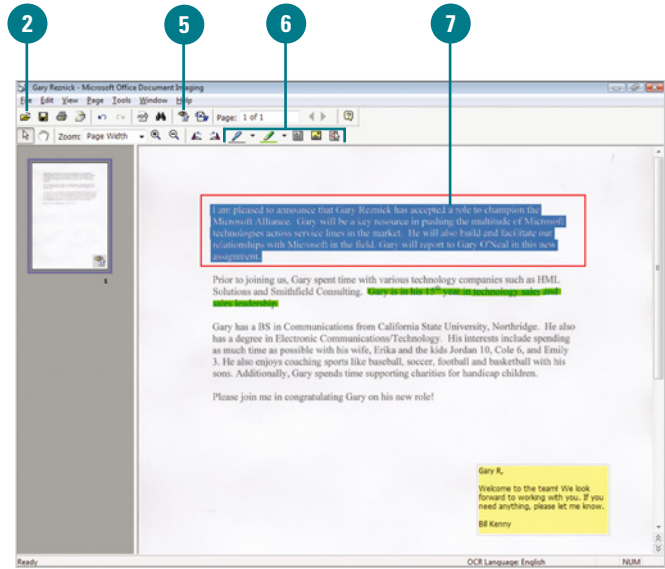
**You can open Microsoft Office Document Scanning program separately.** Click the Start button, point to All Programs, click Microsoft Office, click Microsoft Office Tools, and then click Microsoft Office Document Scanning.

With Microsoft Office Document Imaging, you can scan and manage multiple page documents using the TIFF file format and recognize text in image documents and faxes as editable text by using Optical Character Recognition (OCR). You can copy scanned text and images into Microsoft Office programs as well as e-mail or fax the document over the Internet. If you need to add information to a document, such as a fax, you can add text as a note or comment, apply highlighting, draw shapes, and insert pictures by using the Annotation toolbar (**New!**).



## Perform OCR on a Document Image

- 1 Click the **Start** button, point to **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Office Document Imaging**.
- 2 Click the **Open** button on the toolbar.
- 3 Click the **Look in** list arrow, and then navigate to the file.
- 4 Click the document image you want to open, and then click **Open**.
- 5 Click the **Recognize Text Using OCR** button on the toolbar.
- 6 To add annotations and comments, use the pen, highlighter, and comments buttons on the Annotation toolbar.
- 7 Select the text in the document. It appears with a red rectangle around it.
- 8 Click the **Edit** menu, and then click **Copy**.
- 9 Save and close the document.
- 10 Open or switch to Word, and place the insertion point where you want to paste the text.
- 11 Click the **Paste** button on the Home tab.



# Managing Pictures

## Open Picture Manager and Locate Pictures

- 1 Click the **Start** button, point to **All Programs**, click **Microsoft Office**, click **Microsoft Office Tools**, and then click **Microsoft Office Picture Manager**.

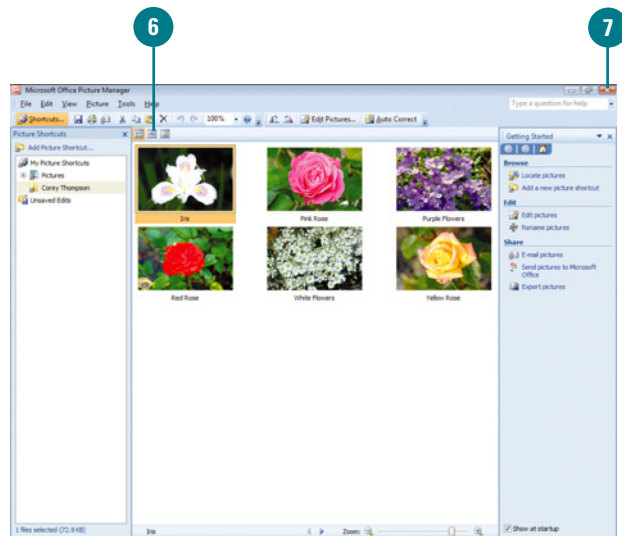
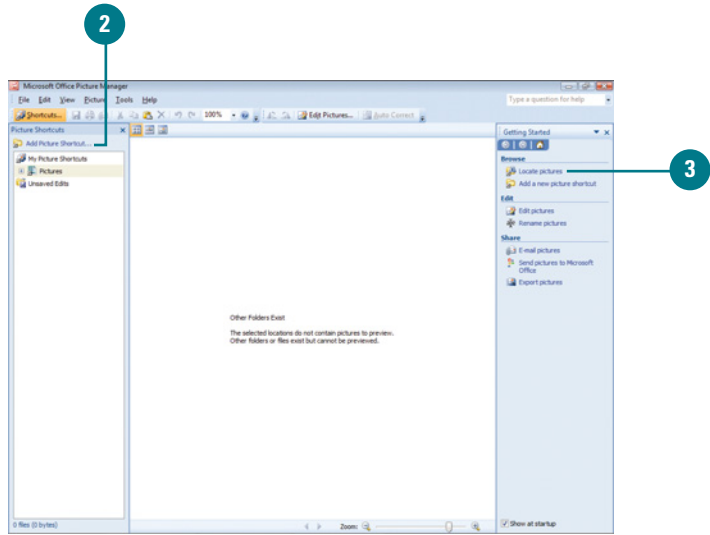
The first time you start the program, it asks you to select the file types you want to open with Picture Manager. Select the check boxes with the formats you want, and then click **OK**.

- 2 If necessary, click **Add Picture Shortcut**.
- 3 Click **Locate Pictures**.
- 4 Click the **Look in** list arrow, and then click a drive location.
- 5 Click **OK**.
- 6 Use the **View** buttons to view your pictures.
- 7 When you're done, click the **Close** button.

### Did You Know?

*You can export a folder of files with a new format or size.* In Picture Manager, click the File menu, click Export, specify the folder with the pictures you want to change, select an export file format or select a size, and then click OK.

With Microsoft Office Picture Manager, you can manage, edit, and share your pictures. You can view all the pictures on your computer and specify which file type you want to open with Picture Manager. If you need to edit a picture, you can use Picture Manager to change brightness, contrast, and color, and to remove red eye. You can also crop, rotate and flip, resize, and compress a picture.

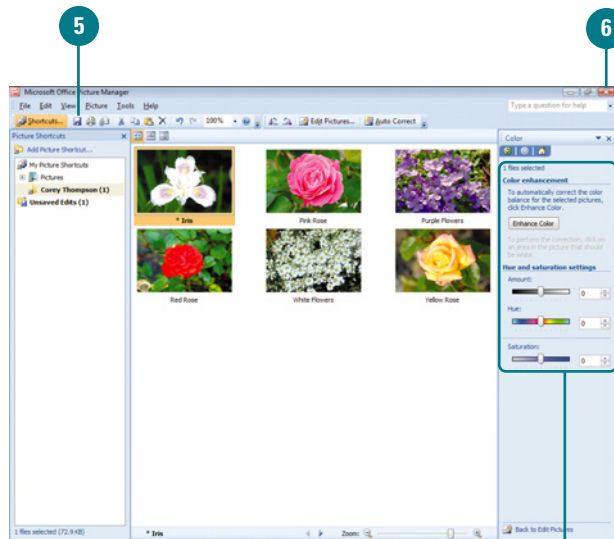
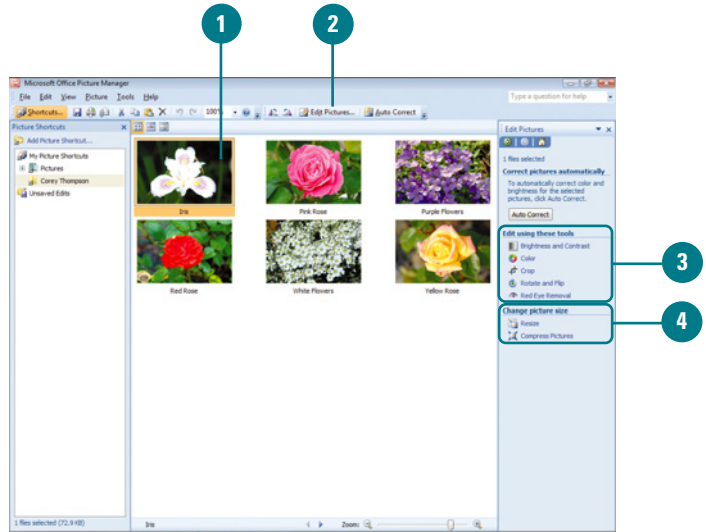


## Edit Pictures

- 1 In Picture Manager, select the picture you want to edit.
- 2 Click the **Edit Pictures** button on the Standard toolbar.
- 3 Use the editing tools on the Edit Pictures task pane to modify the picture.
  - ◆ Brightness and Contrast
  - ◆ Color
  - ◆ Crop
  - ◆ Rotate and Flip
  - ◆ Red Eye Removal
- 4 Use the sizing tools on the Edit Pictures task pane to change the picture size.
  - ◆ Resize
  - ◆ Compress Pictures
- 5 Click the **Save** button on the Standard toolbar.
- 6 When you're done, click the **Close** button.

### Did You Know?

**You can discard changes to a picture.** If you don't like the changes you make to a picture, click the Edit menu, and then click Discard Changes to restore the picture.



Color enhancing options

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# Expanding Word Functionality

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## Introduction

An add-in extends the functionality of Microsoft Office programs. Word includes a variety of add-ins—programs that are included with Word but not essential to its functionality. Before you can use an Word or a third-party add-in, you need to load it first. When you load an add-in, the feature may add a command to a Ribbon tab or toolbar.

If you want to customize Microsoft Office Word 2007 and create advanced documents, you'll need to learn how to work with the Microsoft Office 2007 programming language, **Microsoft Visual Basic for Applications (VBA)**. VBA is powerful and flexible, and you can use it in all major Office applications. To create a VBA application, you have to learn VBA conventions and syntax. Office 2007 makes VBA more user-friendly by providing the Visual Basic Editor, an application that includes several tools to help you write error-free VBA applications. The Visual Basic Editor provides extensive online Help to assist you in this task.

A practical way to use VBA is to create macros. Macros can simplify common repetitive tasks that you regularly use in Word. Macros can reside on the Quick Access Toolbar for easy access. If a macro has a problem executing a task, the Visual Basic Editor can help you debug, or fix the error in your macro.

An ActiveX control is a software component that adds functionality to an existing program. An ActiveX control supports a customizable, programmatic interface for you to create your own functionality, such as a form. Word includes several pre-built ActiveX controls—including a label, text box, command button, and check box—to help you create a user interface.

## What You'll Do

**View and Manage Add-ins**

**Load and Unload Add-ins**

**Enhance a Document with VBA**

**View the Visual Basic Editor**

**Set Developer Options**

**Understand How Macros Automate Your Work**

**Record or Create a Macro**

**Run and Control a Macro**

**Add a Digital Signature to a Macro Project**

**Assign a Macro to a Toolbar**

**Save and Open a Document with Macros**

**Use Content Controls to Create Documents**

**Insert and Use ActiveX Controls**

**Set ActiveX Control Properties**

**Add VBA Code to an ActiveX Control**

**Play a Movie Using an ActiveX Control**

**Change the Document Information Panel**

# Viewing and Managing Add-ins

## View Installed Add-ins

- 1 Click the **Add-Ins** tab.

Add-ins with buttons and controls appear on the Ribbon. To display a ScreenTip, point to a button or control.

- 2 Click the **Office** button, and then click **Word Options**.

- 3 In the left pane, click **Add-Ins**.

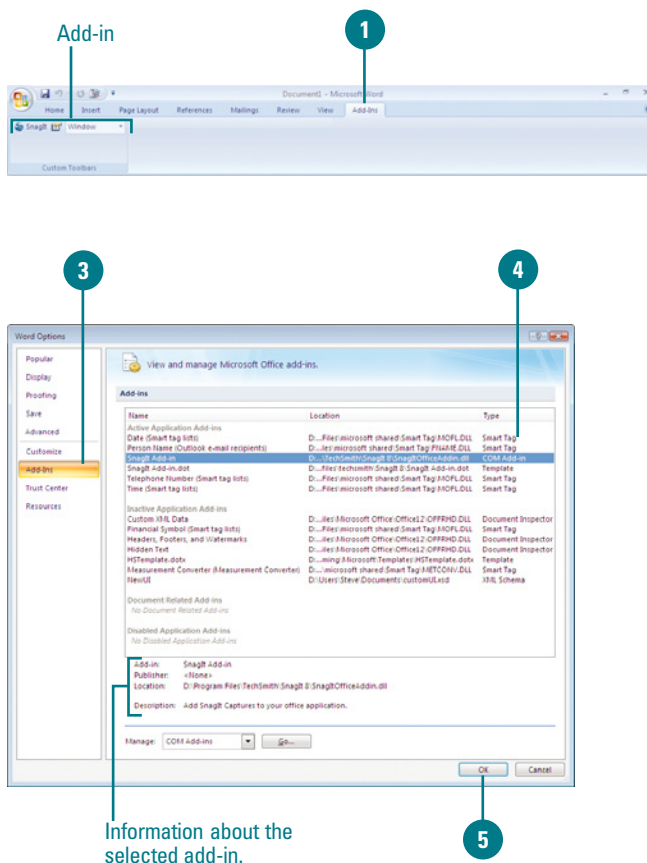
The installed add-ins appear in the list by category.

- ◆ **Active Application Add-ins.** Lists the registered and running add-ins. A selected check box for a COM add-in appears here.
- ◆ **Inactive Application Add-ins.** Lists the installed add-ins, but not currently loaded. A cleared check box for a COM add-in appears here.
- ◆ **Document Related Add-ins.** Lists template files currently open in a document.
- ◆ **Disabled Application Add-ins.** Lists automatically disabled add-ins causing Office programs to crash.

- 4 Click an add-in to display information about it.

- 5 Click **OK**.

An add-in, such as smart tags, extends functionality to Microsoft Office programs (**New!**). An add-in can add buttons and custom commands to the Ribbon. You can get add-ins for Word on the Microsoft Office Online Web site in the Downloads area, or on third-party vendor Web sites. When you download and install an add-in, it appears on the Add-Ins or other tabs in Office programs depending on functionality, and includes a special ScreenTip that identifies the developer. You can view and manage add-ins from the Add-Ins pane in Word Options.

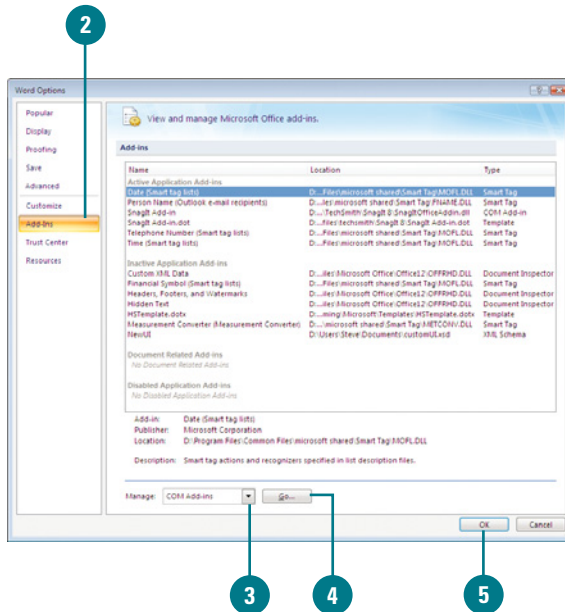


## Manage Installed Add-ins

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Add-Ins**.
- 3 Click the **Manage** list arrow, and then click the add-in list you want to display:

- ◆ **COM Add-ins.** Opens the COM Add-Ins dialog box and lists the Component Object Model (COM) add-ins.
- ◆ **Word Add-ins.** Opens the Add-Ins dialog box and lists the currently installed Word add-ins.
- ◆ **Smart Tags.** Opens the AutoCorrect dialog with the Smart Tags tab and list the installed smart tags.
- ◆ **XML Expansion Pack.** Opens XML Expansion Packs that provide additional XML functionality.
- ◆ **Disabled Items.** Opens the Disabled Items dialog box and lists the disabled items that prevent Word from working properly. If you want to try and enable an item, select it, click Enable, click Close, and then restart Word.

- 4 Click **Go**.
- 5 Click **OK**.



# Loading and Unloading Add-ins

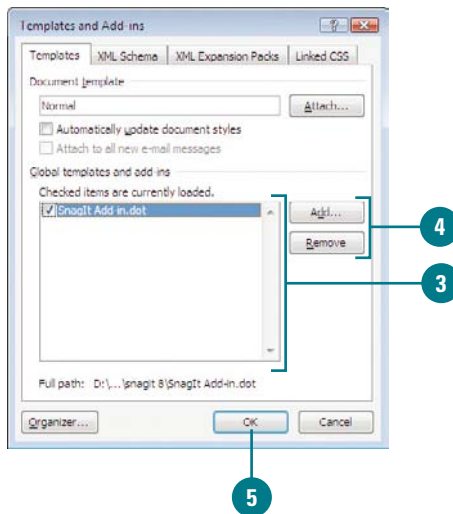
## Load or Unload a Word Add-in

- 1 Click the **Developer** tab.
- 2 Click the **Document Template** button.
- 3 Select or clear the check box next to the global template or add-in you want to load or unload.
- 4 To add or remove one a global template or add-in, do one of the following:
  - ◆ **Add.** Click **Add**, navigate to the folder that contains the add-in, click the **Files of type** list arrow, select **Word Add-Ins**, click the add-in, and then click **OK**.
  - ◆ **Remove.** Select the item you want to remove, and then click **Remove**.
- 5 Click **OK**.

### See Also

See "Setting Developer Options" on page 399 for information on displaying the Developer tab.

Add-ins are additional programs, designed to run seamlessly within Word or Office. There are two main types of add-ins: Word and **Component Object Model (COM)**. Word add-ins are custom controls designed specifically for Word, while COM add-ins are designed to run in one or more Office programs and use the file name extension .dll or .exe. Some add-ins are installed when you run the Setup program, while others can be downloaded from Microsoft Office Online or purchased from third-party vendors. To load or unload add-ins, Word provides commands you can access from an added button on the Quick Access Toolbar, Developer tab, or the Add-Ins pane in Word Options. When you load an add-in, the feature may add a command to a tab or toolbar. You can load one or more add-ins. If you no longer need an add-in, you should unload it to save memory and reduce the number of commands on a tab. When you unload an add-in, you also may need to restart Word to remove an add-in command from a tab.



## Load or Unload a COM Add-in

- 1 Click the **COM Add-Ins** button on the Quick Access Toolbar.
  - ◆ The COM Add-Ins button is not on the Quick Access Toolbar by default. Use the Customize pane in Word Options to add the button.
- 2 Select the check box next to the add-in you want to load, or clear the check box you want to unload.

**TROUBLE?** *If the add-in is not available in the list, click Add, locate and select the add-in you want, and then click OK.*

- 3 To remove the selected add-in, click **Remove**.
- 4 Click **OK**.

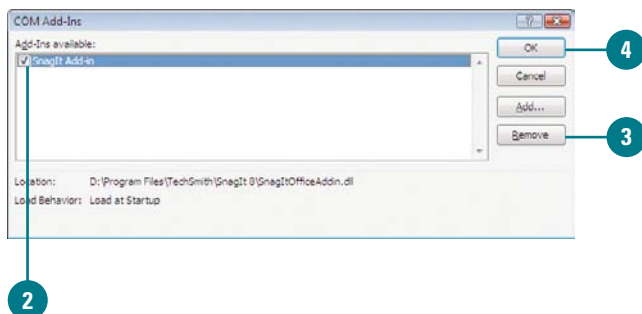
### Did You Know?

**You can get more information about COM online.** Visit [www.microsoft.com/com](http://www.microsoft.com/com).

**You can open an add-in dialog box from Word Options.** Click the Office button, click Word Options, click Add-ins, click the Manage list arrow, click Word Add-ins or COM Add-ins, and then click Go.

### See Also

See “Working with Toolbar” on page 6 for information on adding a button to the Quick Access Toolbar.



## For Your Information

### Dealing with an Add-in Security Alert

When there is a problem with an add-in, Word disables it to protect the program and your data. When a problem does occur, a security alert dialog box appears, displaying information about the problem and options you can choose to fix or ignore it. You can choose an option to help protect you from unknown content (recommended), enable this add-in for this session only, or enable all code published by this publisher. See “Setting Add-ins Security Options” on page 322 for more information about setting options that trigger the Add-in security alert.

# Enhancing a Document with VBA

Office 2007 applications like Word, Access, Excel, PowerPoint, and Visio share a common programming language: Visual Basic for Applications (VBA). With VBA, you can develop applications that combine tools from these Office 2007 products, as well as other programs that support VBA. Because of the language's power and flexibility, programmers often prefer to use VBA to customize their Office applications.

## Introducing the Structure of VBA

VBA is an object-oriented programming language because, when you develop a VBA application, you manipulate objects. An object can be anything within your document, such as a shape, text box, picture, or table. Even Word itself is considered an object. Objects can have properties that describe the object's characteristics. Text boxes, for example, have the Font property, which describes the font Word uses to display the text. A text box also has properties that indicate whether the text is bold or italic.

Objects also have methods—actions that can be done to the object. Deleting and inserting are examples of methods available with a record object. Closely related to methods are events. An event is a specific action that occurs on or with an object. Clicking a button initiates the Click event for the button object. VBA also refers to an event associated with an object as an event property. The form button, for example, has the Click event property. You can use VBA to either respond to an event or to initiate an event.

## Writing VBA Code

A VBA programmer types the statements, or **code**, that make up the VBA program. Those statements follow a set of rules, called **syntax**, that govern how commands are formulated. For example, to change the property of a particular object, the command follows the general form:

```
Object.Property = Expression
```

Where **Object** is the name of a VBA object, **Property** is the name of a property that object has, and **Expression** is a value that will be assigned to the property. The following statement turns on track changes in the active document:

```
ActiveDocument.TrackRevisions = TRUE
```

You can use Office and VBA's online Help to learn about specific object and property names. If you want to apply a method to an object, the syntax is:

```
Object.Method arg1, arg2, ...
```

Where **Object** is the name of a VBA object, **Method** is the name of method that can be applied to that object, and **arg1, arg2, ...** are optional **arguments** that provide additional information for the method operation. For example, to clear the Find and Replace formatting, you could use the following method:

```
Selection.Find.ClearFormatting  
Selection.Find.Replacement.ClearFormatting
```

## Working with Procedures

You don't run VBA commands individually. Instead they are organized into groups of commands called **procedures**. A procedure either performs an action or calculates a value. Procedures that perform actions are called **Sub procedures**. You can run a Sub procedure directly, or Office can run it for you in response to an event, such as clicking a button or opening a form. A Sub procedure initiated by an event is also called an **event procedure**. Office provides event procedure templates to help you easily create procedures for common events. Event procedures are displayed in each object's event properties list.

A procedure that calculates a value is called a **function procedure**. By creating function procedures you can create your own function library, supplementing the Office collection of built-in functions. You can access these functions from within the Expression Builder, making it easy for them to be used over and over again.

## Working with Modules

Procedures are collected and organized within **modules**. Modules generally belong to two types: class modules and standard modules. A **class module** is associated with a specific object. In more advanced VBA programs, the class module can be associated with an object created by the user. **Standard modules** are not associated with specific objects, and they can be run from anywhere within a database. This is usually not the case with class modules. Standard modules are listed in the Database window on the Modules Object list.

## Building VBA Projects

A collection of modules is further organized into a **project**. Usually a project has the same

name as a document. You can create projects that are not tied into any specific document, saving them as Word add-ins that provide extra functionality to Word.

## Using the Visual Basic Editor

You create VBA commands, procedures, and modules in Office's **Visual Basic Editor**. This is the same editor used by Word, Word, and other Office programs. Thus, you can apply what you learn about creating programs in Word to these other applications.

### The Project Explorer

One of the fundamental tools in the Visual Basic Editor is the Project Explorer. The **Project Explorer** presents a hierarchical view of all of the projects and modules currently open in Word, including standard and class modules.

### The Modules Window

You write all of your VBA code in the **Modules** window. The Modules window acts as a basic text editor, but it includes several tools to help you write error-free codes. Word also provides hints as you write your code to help you avoid syntax errors.

### The Object Browser

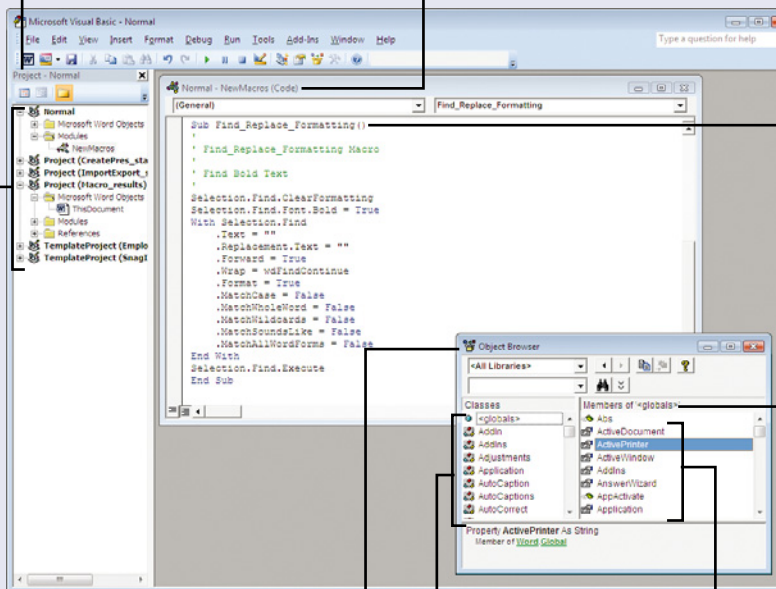
There are hundreds of objects available to you. Each object has a myriad of properties, methods, and events. Trying to keep track of all of them is daunting, but the Visual Basic Editor supplies the **Object Browser**, which helps you examine the complete collection of objects, properties, and methods available for a given object.

# Viewing the Visual Basic Editor

The Project Explorer displays a hierarchical list of all open projects and modules.

The Modules window allows you to enter VBA commands.

VBA projects



A VBA statement

Method

The Object Browser displays a list of available objects, properties, methods, and events.

Objects

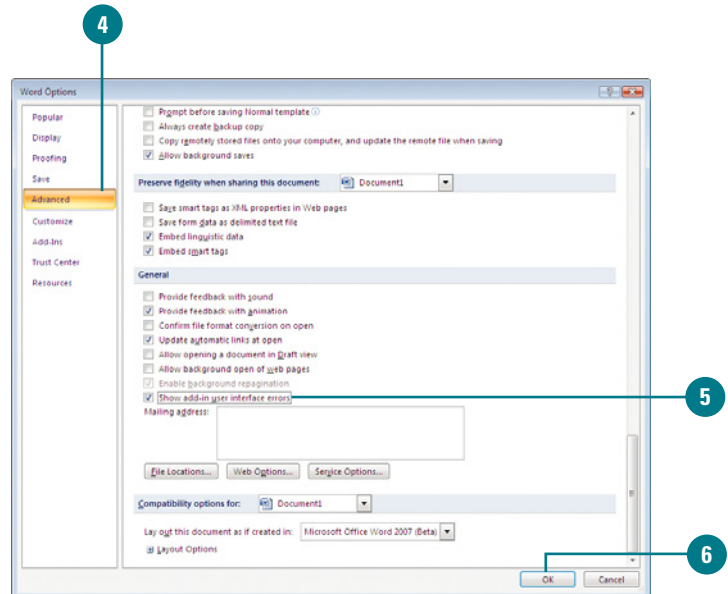
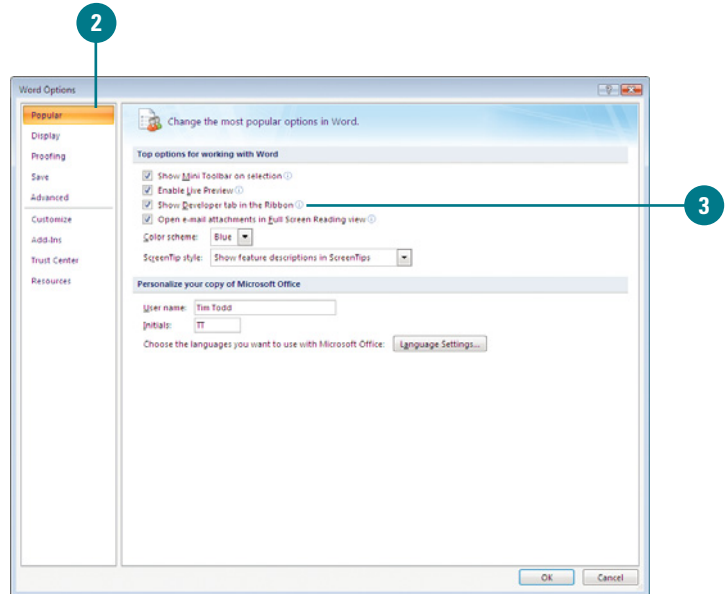
Properties

# Setting Developer Options

## Set Developer Options

- 1 Click the **Office** button, and then click **Word Options**.
- 2 In the left pane, click **Popular**.
- 3 Select the **Show Developer tab in the Ribbon** check box.
- 4 In the left pane, click **Advanced**.
- 5 Select the **Show add-in user interface errors** check box.
- 6 Click **OK**.

The Developer tab (**New!**) is a specialized Ribbon that you can use to access developer controls, write code, or create macros. You can set an option in the Popular pane in Word Options to show or hide the Developer tab. As a developer, you can also set an option to show errors in your user interface customization code.



# Understanding How Macros Automate Your Work

To complete many tasks in Word, you need to execute a series of commands and actions. To print two copies of a selected text in a document, for example, you need to open the document, select the text, open the Print dialog box, and specify that you want to print two copies. If you often need to complete the same task, you'll find yourself repeatedly taking the same series of steps. It can be tiresome to continually repeat the same commands and actions when you can easily create a mini-program, or macro, that accomplishes all of them with a single command.

Creating a **macro** is easy and requires no programming knowledge on your part. Word simply records the steps you want included in the macro while you use the keyboard and mouse. When you record a macro, Word stores the list of commands with any name

you choose. You can store your macros in the current document or in a new document.

Once a macro is created, you can make modifications to it, add comments so other users will understand its purpose, and test it to make sure it runs correctly.

You can run a macro by choosing the Macro command on the View or Developer tab, or by using a shortcut key or clicking a Quick Access Toolbar button you've assigned to it. From the Macro dialog box, you can run, edit, test, or delete any Word macro on your system, or create a new one.

If you have problems with a macro, you can step through the macro one command at a time, known as **debugging**. Once you identify any errors in the macro, you can edit it.



# Recording a Macro

If you find yourself repeating the same set of steps over and over, you can record a macro. Macros can run several tasks for you at the click of a button. When you turn on the macro recorder, Word records every mouse click and keystroke action you execute until you turn off the recorder. Then you can “play,” or run, the macro whenever you want to repeat that series of actions—but Word will execute them at a much faster rate. The macro recorder doesn’t record in real time, so you can take your time to correctly complete each action.

## Record a Macro

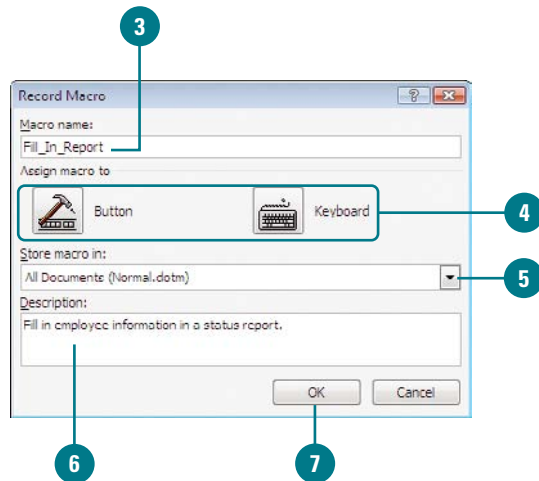
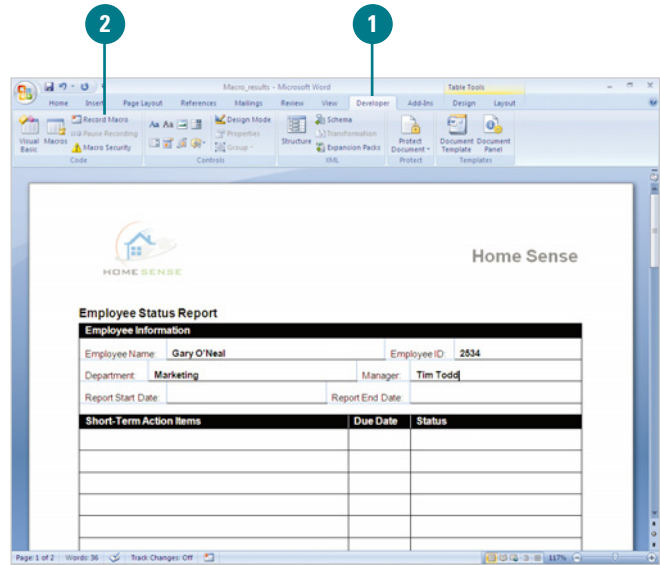
- 1 Click the **Developer** or **View** tab.
- 2 Click the **Record Macro** button.
  - ◆ If you use the View tab, click **View Macros** on the menu.

**TIMESAVER** To quickly start or stop a macro recording, click the **Record** icon or **Stop Record** icon on the **Status bar** (left side).

- 3 Type a name for the macro.
- 4 Assign a shortcut key to use a keystroke combination or assign a button to run the macro.
- 5 Click the **Store macros in** list arrow, and then select a location.

- ◆ **All Documents.** The macro is available whenever you use Word.
- ◆ **Documents Based On.** The macro is available in documents based on this document.
- ◆ **This Document.** The macro is available only in this document.

- 6 If you want, type a description.
- 7 Click **OK**.
- 8 Execute the commands or actions you want to complete the task.
- 9 Click the **Stop Recording** button.



# Creating a Macro

## Create a Macro

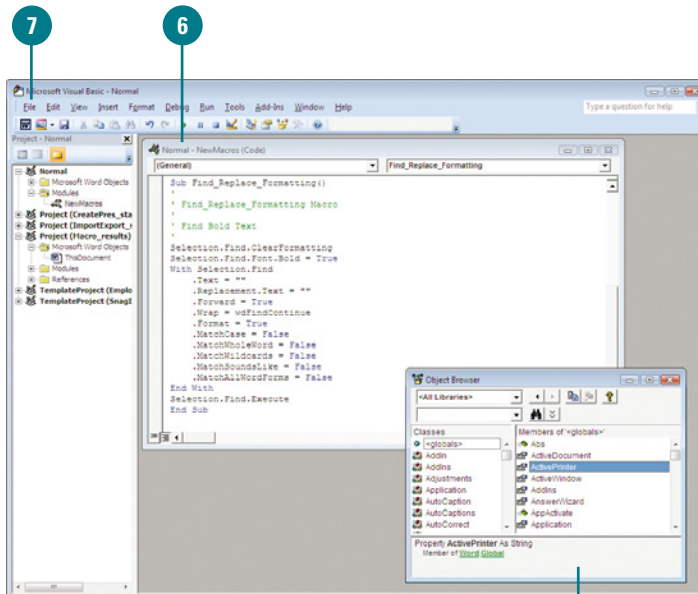
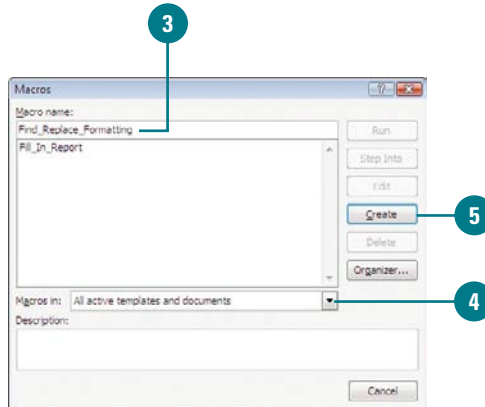
- 1 Click the **Developer** or **View** tab.
- 2 Click the **Macros** button.
  - ◆ If you use the View tab, click **View Macros** on the menu.
- 3 Type a name for the macro.
- 4 Click the **Macros in** list arrow, and then click **All active templates and documents** or the document to which you want the macro stored.
- 5 Click **Create**.

The Microsoft Visual Basic window opens.

- 6 Click the Module window (if necessary), and then type new Visual Basic commands, or edit existing ones.
- 7 When you're done, click the **Save** button, click the **File** menu, and then click **Close and Return to Microsoft Word**.

To run the macro, press F5.

If you find yourself repeating the same set of steps over and over, or if you need to add new functionality to Word, you could create a macro. If you find it difficult to record a macro, you can create one using a programming language called Microsoft Visual Basic for Applications (VBA). With VBA, you create a macro by writing a script to replay the actions you want. The macros for a particular document are stored in a macro module, which is a collection of Visual Basic codes.



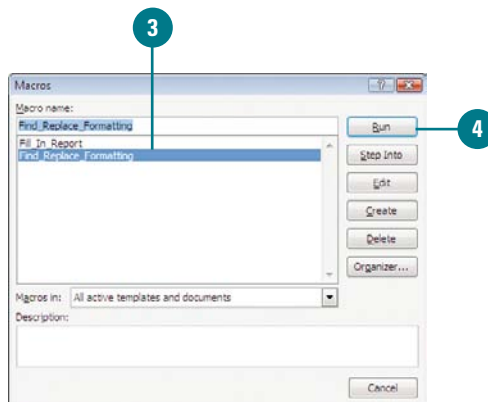
Object Browser helps you insert commands.

# Running a Macro

Running a macro is similar to choosing a command in Word. When you record or edit the macro, you have the choice of making it available through a menu command, a keyboard combination, or even a toolbar button. As with other options in Word, your choice depends on your personal preferences—and you can choose to make more than one option available. Where you store a macro when you save it determines its availability later. Macros stored in the Personal Macro document are always available, and macros stored in any other documents are only available when the document is open.

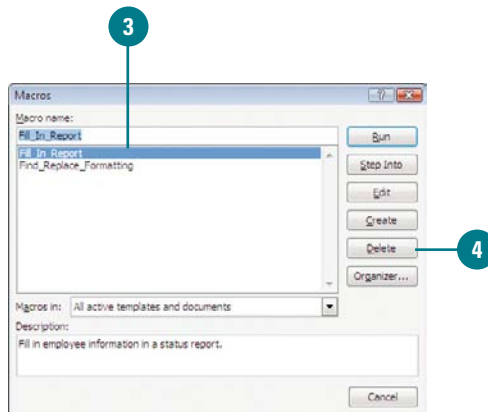
## Run a Macro

- 1 Click the **Developer** or **View** tab.
  - 2 Click the **Macros** button.
    - ◆ If you use the View tab, click **View Macros** on the menu.
- TIMESAVER** Click the *Macros* button on the Status bar.
- 3 Click the macro you want to run.
  - 4 Click **Run**.



## Delete a Macro

- 1 Click the **Developer** or **View** tab.
- 2 Click the **Macros** button.
  - ◆ If you use the View tab, click **View Macros** on the menu.
- 3 Click the macro you want to delete.
- 4 Click **Delete**, and then click **Delete** again to confirm the deletion.



### Did You Know?

**You can stop a macro.** Press **Ctrl+Break** to stop a macro before it completes its actions.

# Controlling a Macro

## Debug a Macro Using Step Mode

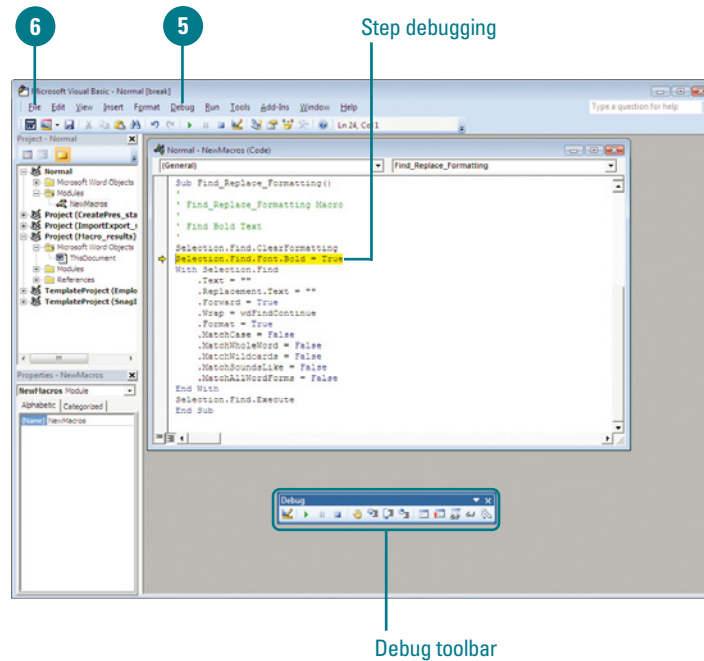
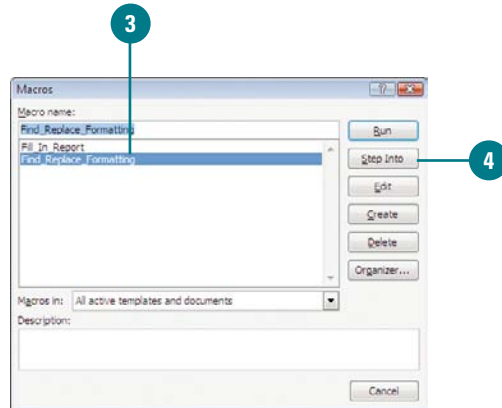
- 1 Click the **Developer** or **View** tab.
- 2 Click the **Macros** button.
  - ◆ If you use the View tab, click **View Macros** on the menu.
- 3 Click the macro you want to debug.
- 4 Click **Step Into**.

The Microsoft Visual Basic window opens.
- 5 Click the **Debug** menu, and then click **Step Into** (or press F8) to proceed through each action.
  - ◆ You can also use other commands like **Step Over** and **Step Out** to debug the code.
- 6 When you're done, click the **Save** button, click the **File** menu, and then click **Close and Return to Microsoft Word**.
- 7 Click **OK** to stop the debugger.

### Did You Know?

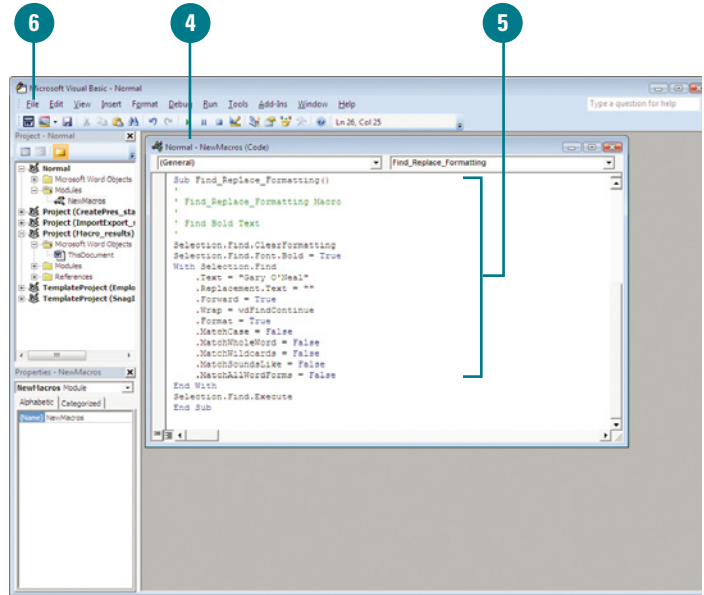
*You can display the Debug toolbar.* In the Visual Basic editor, click the View menu, point to Toolbars, and then click Debug.

If a macro doesn't work exactly the way you want it to, you can fix the problem using Microsoft Visual Basic for Applications (VBA). VBA allows you to **debug**, or repair, an existing macro so that you change only the actions that aren't working correctly. All macros for a particular document are stored in a macro module, a collection of Visual Basic programming codes that you can copy to other document files. You can view and edit your Visual Basic modules using the Visual Basic editor. By learning Visual Basic you can greatly increase the scope and power of your programs.



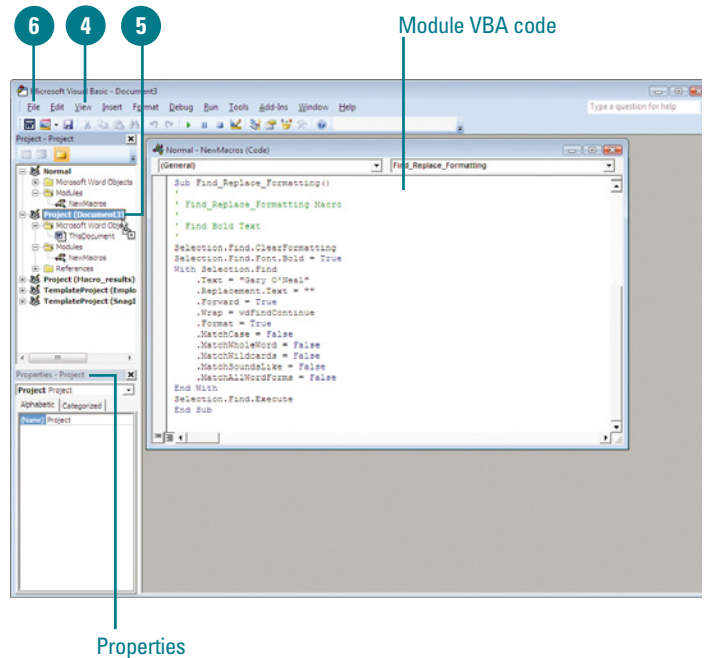
## Edit a Macro

- 1 Click the **Developer** or **View** tab.
- 2 Click the **Macros** button.
  - ◆ If you use the View tab, click **View Macros** on the menu.
- 3 Click the macro you want to edit, and then click **Edit**.
- 4 Click the Module window containing the Visual Basic code for your macro.
- 5 Type new Visual Basic commands, or edit the commands already present.
- 6 Click the **Save** button, click the **File** menu, and then click **Close and Return to Microsoft Word**.



## Copy a Macro Module to Another Document

- 1 Open the document files you want to copy the macro from and to.
- 2 Click the **Developer** tab.
- 3 Click the **Visual Basic** button.
- 4 Click the **View** menu, and then click **Project Explorer**.
- 5 Drag the module you want to copy from the source document to the destination document.
- 6 Click the **Save** button, click the **File** menu, and then click **Close and Return to Microsoft Word**.



# Adding a Digital Signature to a Macro Project

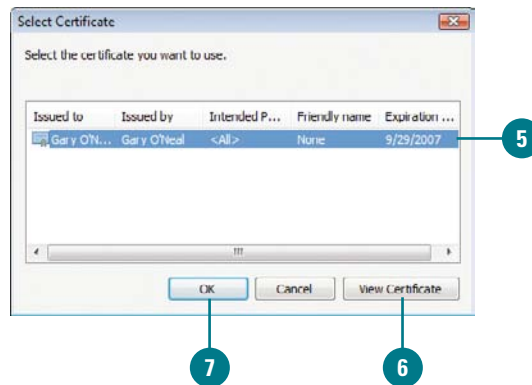
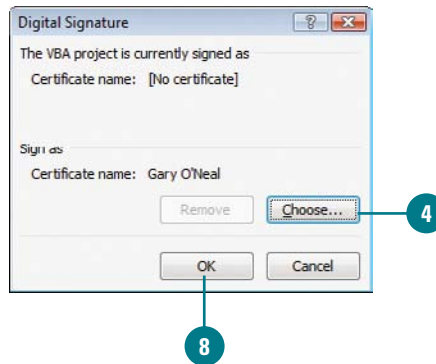
## Sign a Macro Project

- 1 Open the document that contains the macro project, and then click the **Developer** tab.
- 2 Click the **Visual Basic** button to open the Visual Basic window.
- 3 Click the **Tools** menu, and then click **Digital Signature**.
- 4 Click **Choose**.
- 5 Select a certificate in the list.
- 6 To view a certificate, click **View Certificate**, and then click **OK**.
- 7 Click **OK**.
- 8 Click **OK** again.
- 9 Click the **Save** button, click the **File** menu, and then click **Close and Return to Microsoft Word**.

### Did You Know?

*You can create a self-signing certificate for a macro project.* Click the Start button, point to All Programs, click Microsoft Office, click Microsoft Office Tools, click Digital Certificate for VBA Projects, enter a name, and then click OK. Office programs trust a self-signed certificate only on the computer that created it.

If you want to add a digital signature to a document with a macro, you need to add it using the Visual Basic editor. If you open a document that contains a signed macro project with a problem, the macro is disabled by default and the Message Bar appears to notify you of the potential problem. You can click Options in the Message Bar to view information about it. For more details, you can click Show Signature Details to view certificate and publisher information. If a digital signature has problems—it's expired, not issued by a trusted publisher, or the document has been altered—the certificate information image contains a red X. When there's a problem, contact the signer to have them fix it, or save the document to a trusted location, where you can run the macro without security checks.



# Assigning a Macro to a Toolbar

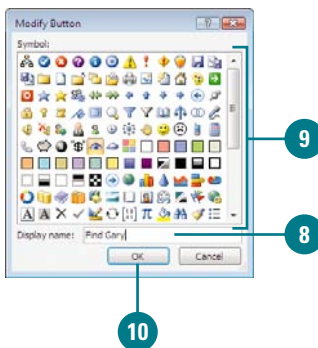
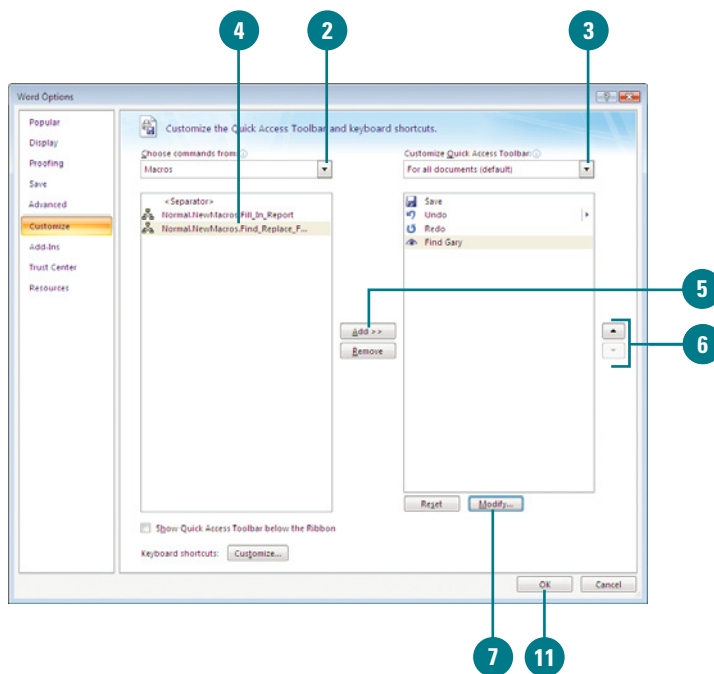
## Assign a Macro to a Toolbar

- 1 Click the **Customize Quick Access Toolbar** list arrow, and then click **More Commands**.
- 2 Click the **Choose command from** list arrow, and then click **Macros**.
- 3 Click the **Customize Quick Access Toolbar** list arrow, and then click **For all documents (default)**.
- 4 Click the macro you want to add (left column).
- 5 Click **Add**.
- 6 Click the **Move Up** and **Move Down** arrow buttons to arrange the commands in the order you want them to appear.
- 7 Click **Modify**.
- 8 Type a name for the button.
- 9 Click an icon in the symbol list.
- 10 Click **OK**.
- 11 Click **OK**.

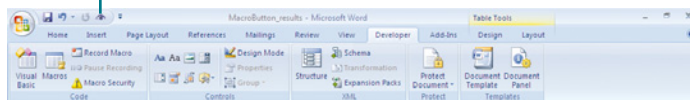
### See Also

See "Working with Toolbars" on page 6 and "Accessing Command Not in the Ribbon" on page 384 for information on using the Quick Access Toolbar.

After you create a macro, you can add the macro to the Quick Access Toolbar (**New!**) for easy access. When you create a macro, the macro name appears in the list of available commands when you customize the Quick Access Toolbar in Word Options. When you point to a macro button on the Quick Access Toolbar, a ScreenTip appears, displaying **Macro: document name!macro name**.



Macro button



# Saving a Document with Macros

Microsoft Certified Application Specialist

WD07S-6.1.1

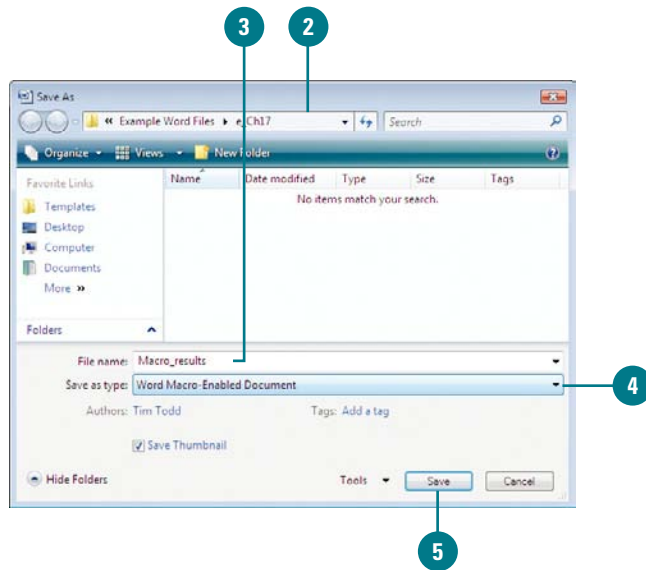
## Save a Document with Macros

- 1 Click the **Office** button, and then click **Save As**.

**TIMESAVER** To select the Word Macro-Enabled file type, click the Office button, point to Save As, and then click Word Macro-Enabled Document.

- 2 Click the **Save in** list arrow, and then click the drive or folder where you want to save the file.
- 3 Type a document file name.
- 4 If necessary, click the **Save as type** list arrow, and then select the macro format you want:
  - ◆ **Word Macro-Enabled Document.** A document (.docm) that contains VBA code.
  - ◆ **Word Macro-Enabled Template.** A template (.dotm) that includes preapproved macros.
- 5 Click **Save**.

Macros are created using Visual Basic for Applications (VBA) code. If you add a macro to a document, you need to save it with a file name extension that ends with an “m” (**New!**), either Word Macro-Enabled Document (.docm), or Word Macro-Enabled Template (.dotm). If you try to save a document containing a macro with a file name extension that ends with an “x” (such as .docx or .dotx), Word displays an alert message, restricting the operation. These Word file types are designated to be VBA code-free.

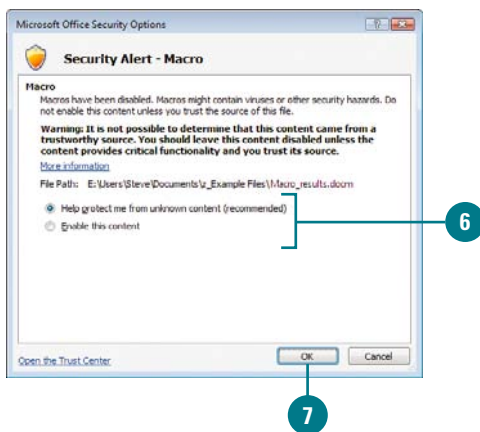
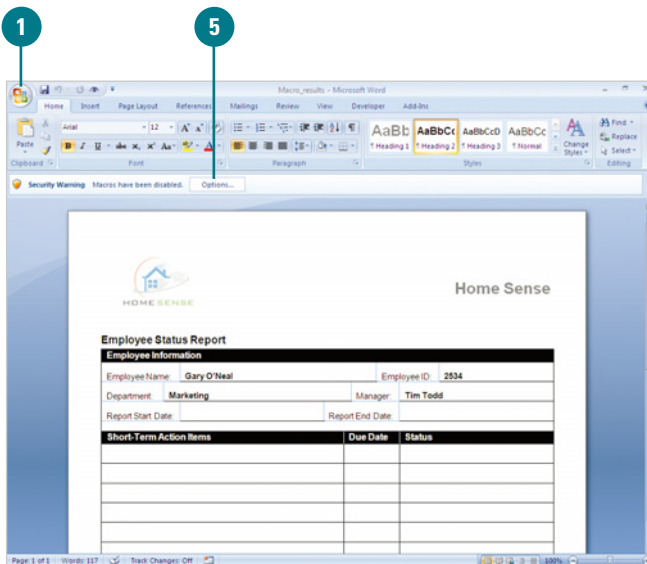


# Opening a Document with Macros

## Open a Document with Macros

- 1 Click the **Office** button, and then click **Open**.
- 2 If necessary, click the **File as type** list arrow, and then the document type that contains a macro.
- 3 If the file is located in another folder, click the **Look in** list arrow, and then navigate to the file.
- 4 Click the document with macros you want to open, and then click **Open**.
- 5 Click **Options** in the Security Warning.
- 6 If you trust the document content, click the **Enable external content** option or the **Trust all documents from this publisher** option (if available) to open it. If you don't trust it, click the **Help protect me from unknown content** option to block and disable the macros.
- 7 Click **OK**.

When you open a document with a macro, VBA, or other software code, Word displays a security warning (**New!**) to let you know the document might contain potentially harmful code that may harm your computer. If you know and trust the author of the document, you can change security options to enable the macro content and use the document normally. If you don't trust the content, you can continue to block and disable the content and use the document with limited functionality. If you don't want a security alert to appear, you can change security settings in the Trust Center in Word Options.



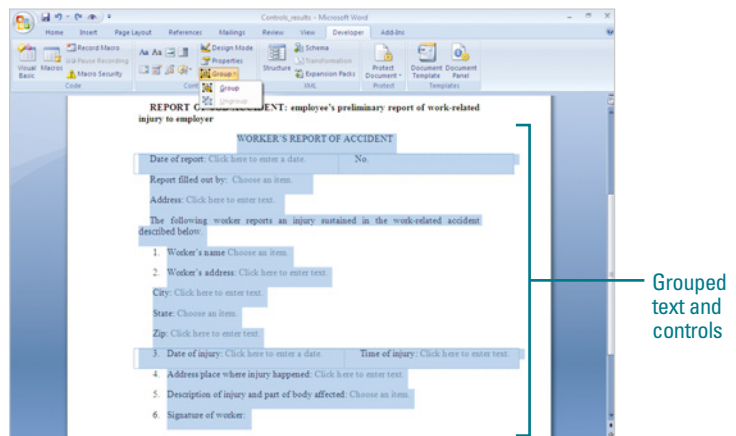
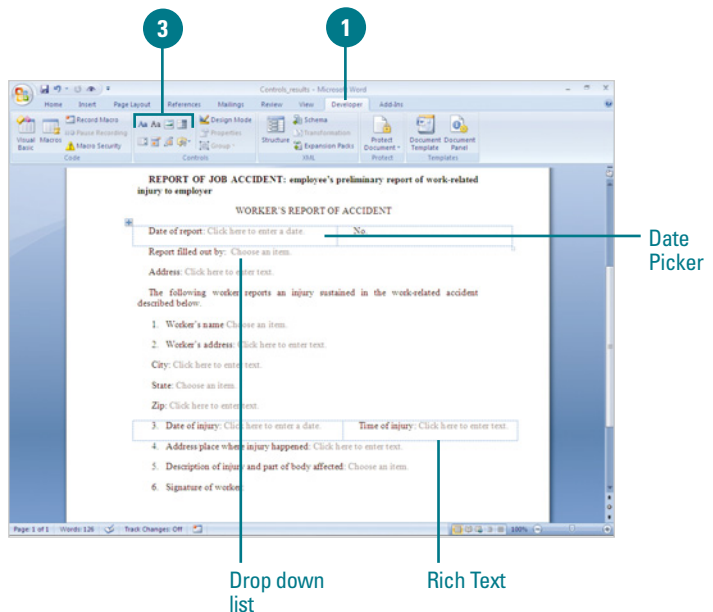
# Using Content Controls to Create Documents

## Add Controls to a Document

- 1 Click the **Developer** tab.
- 2 Position the insertion point where you want to insert a control.
- 3 Use the buttons in the Controls group to insert controls.

- ◆ **Rich Text** or **Text**. Click to insert a text box where you can enter text.
- ◆ **Picture**. Click to insert a placeholder where you can insert a picture.
- ◆ **Combo Box**. Click to insert a combo box control.
- ◆ **Drop Down List**. Click to insert a drop down list control where you can select from a list.
- ◆ **Date Picker**. Click to insert a control to select a date from a pop-up calendar.
- ◆ **Building Block Gallery**. Click to insert a Quick Part control where you can specify the information you want.
- ◆ **Legacy Tools**. Click to select form and ActiveX controls.
- ◆ **Group**. Select contents you want to protect; prevents changes to document.

Forms are an easy way for you to interact with users of your documents, either online or in print, and gain information and feedback from them in the process. Controls—either Content (**New!**), Form, and ActiveX—are predefined fields or set of fields that contain information you can use throughout a document. Word includes many different types: text boxes for typed entries, date picker, combo boxes, drop-down lists, and check boxes. The fields display information you provided in Document Properties or a placeholder, which you can fill in. After you insert the fields you want, you can change field properties to customize the form. Word uses Content controls and Quick Parts as part of the program to build page covers, headers and footers, pull quotes, and side bar to name a few.



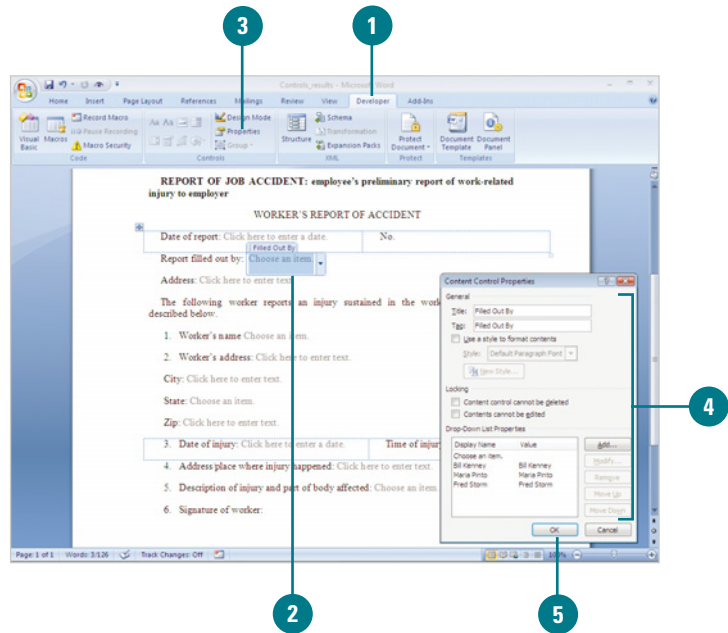
## Set or Change Control Properties

- 1 Click the **Developer** tab.
- 2 Select the control you want to set or change properties.
- 3 Click the **Properties** button.
- 4 Select the new options you want for the form field.
- 5 Click **OK**.

### Did You Know?

**You can prevent any changes to a document except content controls.** Open the document with content controls, click the Developer tab, select the text you don't want to get changed, and then click Group. You can not change any of the grouped text. However, you can enter text or specify options using the content controls. To remove the protection, click the Group button, and then click Ungroup.

**You can protect a form or document.** Click the Document Protect button on the Developer tab, and then Restrict Formatting and Editing to prevent users of the form from being able to edit its content (not their answers, but the questions and choices themselves).



### For Your Information

#### Mapping Content Controls to XML Data

You can map most content controls to elements in XML data attached to a document. XML data is stored in document parts using the Office XML file formats; for Word the XML file format is .docx. Document parts help define sections of the overall contents of the file. The file format consists of many different types of document parts, including custom XML data part. All document content associated with an XML element maps to data in a custom XML data part. This separation of the XML from the document formatting and layout—known as the Open Packaging Convention (**New!**)—makes it easier to access data. To view the document parts (which is a compressed zip package), add .zip to the end of the document name after the .docx, and then double-click the renamed file. The contents of the file appear, displaying a tree structure of individual document parts. You can move the custom.xml document part out of the zip file to open and modify it. You can attach the XML file to other Office documents to reuse data. When you're done changing the XML file, you can move it back into the zip file and use it with the original file.

# Inserting ActiveX Controls

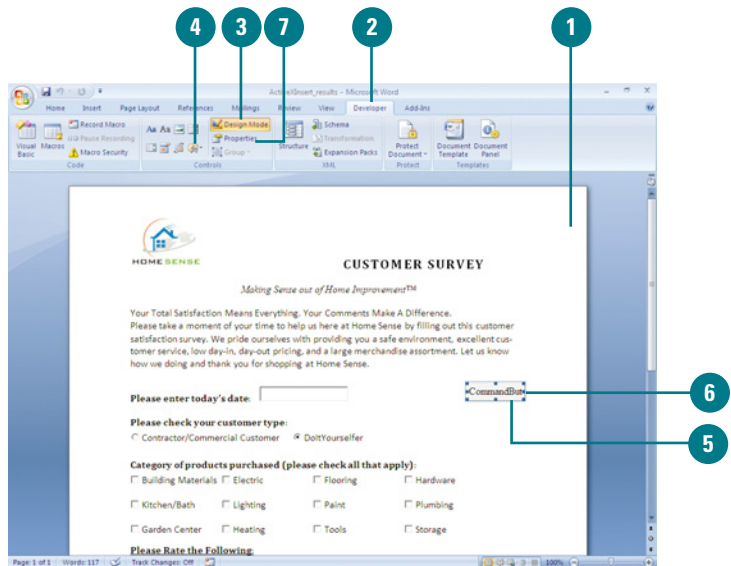
## Insert ActiveX Controls

- 1 Display the document where you want to place the ActiveX control.
- 2 Click the **Developer** tab.
- 3 Click the **Design Mode** button (highlighted).
- 4 Click the **Legacy Tools** button arrow, and then click the button with the ActiveX control you want to use.

See the next page for a list and description of each ActiveX control.

- 5 Drag (pointer changes to a plus sign) to draw the ActiveX control the size you want.
- 6 To resize the control, drag a resize handle (circles) to the size you want.
- 7 To add Visual Basic code to the ActiveX control, right-click the control, click **View Code**, or to change display properties, click the **Properties** button. To exit, click the **Save** and **Close** buttons.
- 8 Click the **Design Mode** button (not highlighted) to exit.

An ActiveX control is a software component that adds functionality to an existing program. An ActiveX control is really just another term for an OLE (Object Linking and Embedding) object, known as a Component Object Model (COM) object. An ActiveX control supports a customizable, programmatic interface. Word includes several pre-built ActiveX controls (**New!**) on the Developer tab, including a label, text box, command button, image, scroll bar, check box, option button, combo box, list box, and toggle button. To create an ActiveX control, click the Insert button on the Developer tab, and then click the ActiveX control you want, and then drag to insert it with the size you want. If there is a problem with an ActiveX control, Word disables it to protect the program and your data. When a problem does occur, a security alert dialog box appears, displaying information about the problem and options you can choose to leave it disabled or enable it.



## For Your Information

### Using Form Controls

Form controls are objects that users can interact with to enter or manipulate data. For example, you can add a Check box control to your document so that users can turn an option on and off. You can select a control from the Developer tab and drag to create the control directly on your document just like an ActiveX control. For an example on using form controls, see project downloads for Office 2007 On Demand available on the Web at [www.perspection.com](http://www.perspection.com).

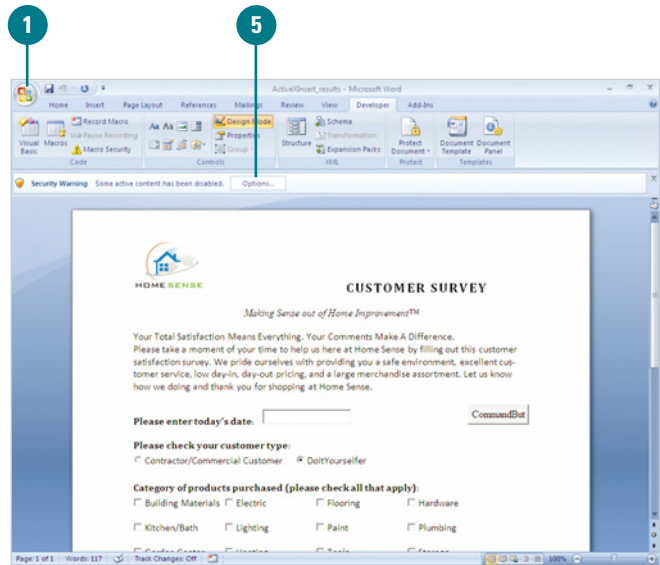
## Deal with an ActiveX Control Security Alert

- 1 Click the **Office** button, and then click **Open**.
- 2 Click the **File as type** list arrow, and then click the document type that contains the ActiveX control.
- 3 If the file is located in another folder, click the **Look in** list arrow, and then navigate to the file.
- 4 Click the document with the ActiveX control you want to open, and then click **Open**.
- 5 Click **Options** in the Security Warning.
- 6 If you trust the document content, click the **Enable this content** option to open it. If you don't trust it, click the **Help protect me from unknown content** option to block and disable the macros.
- 7 Click **OK**.

### See Also













See "Setting ActiveX Security Options" on page 323 for more information about setting options that trigger the ActiveX security alert.

See "Setting ActiveX Control Properties" on page 415 for more information about setting ActiveX display properties.



# Using ActiveX Controls

## ActiveX Controls

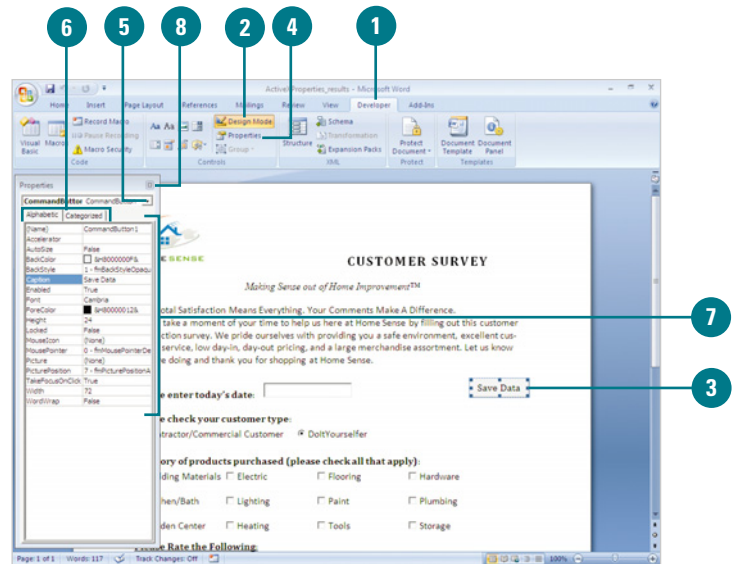
Button	Name	Description
	Label	This button creates a text label. Because the other controls already include a corresponding label, use this button to create labels that are independent of other controls.
	Text Box	This button creates a text box in which the user can enter text (or numbers). Use this control for objects assigned to a text or number data type.
	Spin Button	This button creates a box in which the user can click arrows to increase or decrease numbers in a box. Use this control assigned to a number data type.
	Command Button	This button creates a button that runs a macro or Microsoft Visual Basic function when the user clicks the button in the form.
	Image	This button inserts a frame, in which you can insert a graphic in your form. Use this control when you want to insert a graphic, such as clip art or a logo.
	Scroll Bar	This button creates a scroll bar pane in which the user can enter text (or numbers) in a scrollable text box. Use this control for objects assigned to a text or number data type.
	Check Box	This button creates a check box that allows a user to make multiple yes or no selections. Use this control for fields assigned to the yes/no data type.
	Option Button	This button creates an option button (also known as a radio button) that allows the user to make a single selection from at least two choices. Use this control for fields assigned to the yes/no data type.
	Combo Box	This button creates a combo box in which the user has the option to enter text or select from a list of options. You can enter your own options in the list, or you can display options stored in another table.
	List Box	This button creates a list box that allows a user to select from a list of options. You can enter your own options in the list, or can have another table provide a list of options.
	Toggle Button	This button creates a button that allows the user to make a yes or no selection by clicking the toggle button. Use this control for fields assigned to the yes/no data type.
	More Controls	Click to display other controls, such as Adobe Acrobat Control for ActiveX, Microsoft Forms 2.0, Microsoft Office InfoPath controls, and Microsoft Web Browser.

# Setting ActiveX Control Properties

## Set ActiveX Control Properties

- 1 Click the **Developer** tab.
- 2 Click the **Design Mode** button (highlighted).
- 3 Select the control whose properties you want to modify.
- 4 Click the **Properties** button.
- 5 To switch controls, click the **Controls** list arrow (at the top), and then select the one you want.
- 6 Click the **Alphabetic** or **Categorized** tab to display the control properties so you can find the ones you want.
- 7 Click the property box for the property you want to modify, and then do one of the following:
  - ◆ Type the value or information you want to use, such as the control name.
  - ◆ If the property box contains a list arrow, click the arrow and then click a value in the list.
  - ◆ If a property box contains a dialog button (...), click it to open a dialog box to select options or insert an object, such as a picture.
- 8 When you're done, click the **Close** button on the Properties window.
- 9 Click the **Design Mode** button (not highlighted) to exit.

Every ActiveX control has properties, or settings, that determine its appearance and function. You can open a property sheet that displays all the settings for that control in alphabetic or category order directly from Word (**New!**). The ActiveX controls appear in the Properties window in two columns: the left column displays the name of the control, and the right column displays the current value or setting for the control. When you select either column, a list arrow appears in the right column, allowing you to select the setting you want. After you set properties, you can add VBA code to a module to make it perform.

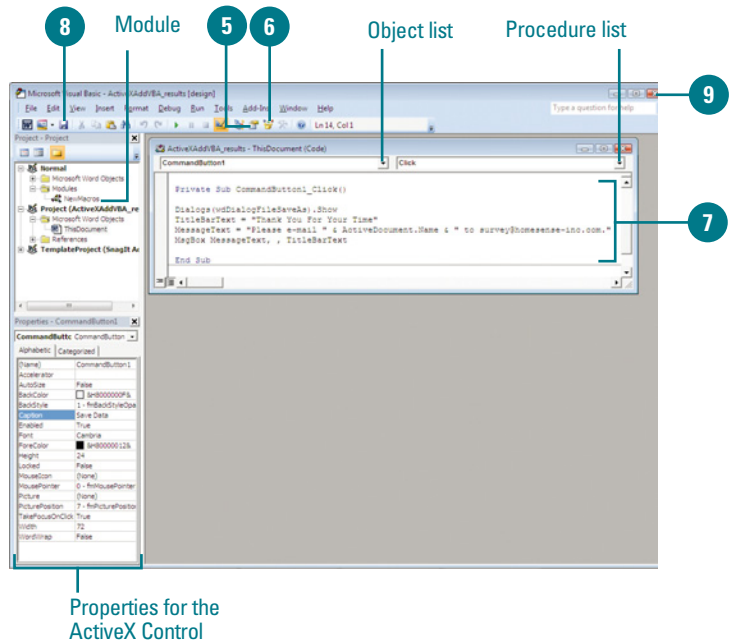


# Adding VBA Code to an ActiveX Control

## Add VBA Code to an ActiveX Control

- 1 Click the **Developer** tab.
- 2 Click the **Design Mode** button (highlighted).
- 3 Select the control to which you want to add VBA code.
- 4 Right-click the control, and then click **View Code**.  
  
The Visual Basic Editor window opens.
- 5 To show the Properties window, click the **Properties window** button.
- 6 To help with scripting commands, click the **Object Browser** button on the toolbar.
- 7 Click in the Code window between the beginning and ending line of the procedure, and then type VBA code to perform the task you want.  
  
The Object list is set to *CommandButton1*, and the Procedure list is set to *Click*.
- 8 When you're done, click the **Save** button on the toolbar.
- 9 Click the program **Close** button.
- 10 Click the **Design Mode** button (not highlighted) to exit.

After you add controls and set properties, you can add VBA code to a module to determine how the controls respond to user actions. All controls have a predefined set of events. For example, a command button has a Click event that occurs when the user clicks the button. When you select a control in Design Mode and then click the View Code button, the Visual Basic Editor opens with a Code window, displaying the start of a procedure that runs when the event occurs. The top of the Code window displays the active object and event procedure. The Object list displays the ActiveX control, such as *CommandButton1*, and the Procedure list displays the trigger event, such as *Click*.

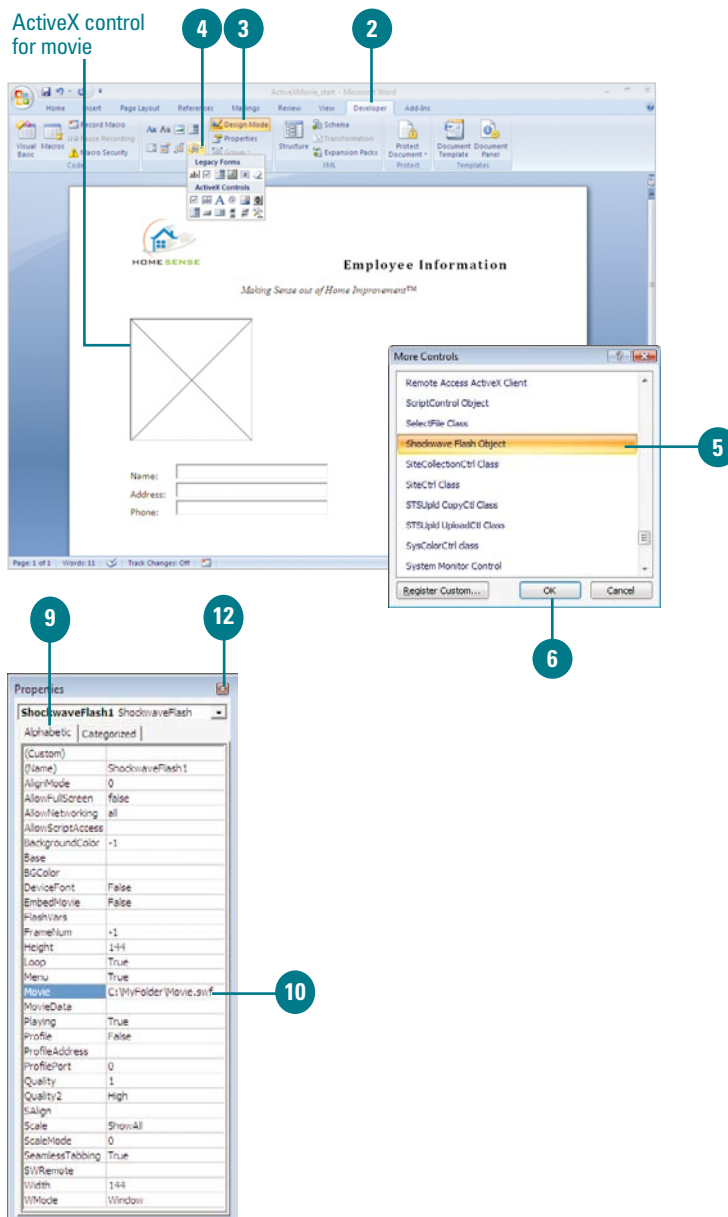


# Playing a Movie Using an ActiveX Control

## Play a Flash Movie

- 1 Save the Flash file to a Flash movie file (.swf) using the Flash software.
- 2 Click the **Developer** tab.
- 3 Click the **Design Mode** button (highlighted).
- 4 Click the **Legacy Tools** button, and then click the **More Controls** button.
- 5 Click **Shockwave Flash Object**.
- 6 Click **OK**.
- 7 Drag to draw the movie control.
- 8 Right-click the Shockwave Flash Object, and then click **Properties**.
- 9 Click the **Alphabetic** tab.
- 10 Click the **Movie** property, click in the value column next to Movie, type full path and file name (c:\MyFolder\Movie.swf), or the URL to the Flash movie you want.
- 11 To set specific options, choose any of the following:
  - ◆ To play the file automatically when the document appears, set the Playing property to True.
  - ◆ To embed the Flash file, set the EmbedMovie property to True.
- 12 When you're done, click the **Close** button.
- 13 Click the **Design Mode** button (not highlighted) to exit.

Although you cannot insert a Flash movie into an Word 2007 document, you can play one using an ActiveX control and the Flash player (**New!**). Before you can use the control, the ActiveX control and Flash player need to be installed on your computer. You can get the ActiveX control at <http://activex.microsoft.com/activex/activex/>. To play the Flash (.swf) movie, you add the Shockwave Flash Object ActiveX control to the document and create a link to the file. If a movie doesn't play, check ActiveX security options in the Trust Center in Word Options.



# Changing the Document Information Panel

## Select a Document Information Panel Template

- 1 Click the **Developer** tab.
- 2 Click the **Document Panel** button.
- 3 Click **Browse**, locate and select the custom template you want, and then click **Open**.

- ◆ **URL**. Short for Uniform Resource Locator. The address of resources on the Web.

*http://www.perspection.com/index.htm*

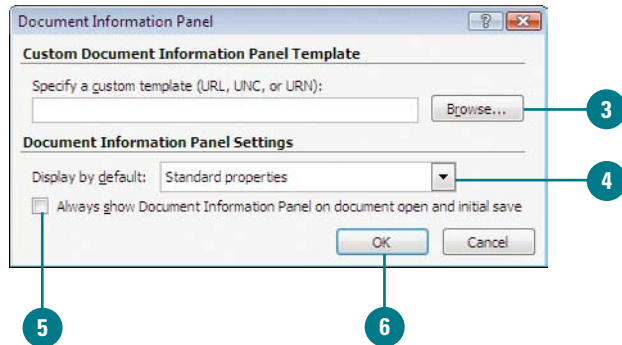
- ◆ **UNC**. Short for Uniform or Universal Naming Convention. A format for specifying the location of resources on a local-area network (LAN).

*\\server-name\shared-resource-pathname*

- ◆ **URN**. Short for Uniform Resource Name.

- 4 Click the **Display by default** list arrow, and then select the default properties you want.
- 5 Select the **Always show Document Information Panel on document open and initial save** check box.
- 6 Click **OK**.

The Document Information Panel (**New!**) helps you manage and track document property information—also known as metadata—such as title, author, subject, keywords, category, and status. The Document Information Panel displays an XML-based mini-form using an InfoPath Form Template (.xsn) file developed in Microsoft InfoPath 2007. By using an XML InfoPath form, you can create your own form templates to edit the document property data and perform data validation.



# Working Together on Office Documents

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# 18

## Introduction

Microsoft Office Groove 2007 is a new addition to the Microsoft Office 2007 Enterprise system that enables teams to set up collaborative workspaces. With Office Groove 2007 (**New!**), you can bring the team, tools, and information together from any location to work on a project. After creating documents with Microsoft Office programs, you can use Groove for file sharing, document reviews, co-editing and co-reviewing Word documents, and for co-viewing Access databases.

Instead of using a centralized server—like Office SharePoint Server 2007—to store information and manage tasks, Office Groove stores all your workspaces, tools, and data right on your computer. You don't need to connect to a network to access or update information. While you're connected to the Internet, Groove automatically sends the changes you make in a workspace to your team member's computers, and any changes they make get sent to you. Office Groove uses built-in presence awareness, alerts, and unread marks to see who is working online and what team members are doing without having to ask.

Office Groove uses tools and technology from other Microsoft Office system products to help you work together and stay informed. With the Groove SharePoint Files tool, you can check out documents from Microsoft Office SharePoint 2007 into a Groove workspace, collaborate on them, and then check them back in when you're done. With the Groove InfoPath Forms tool, you can import form solutions created in Office InfoPath 2007, or design your own.

If you have access to an Office SharePoint 2007 site, you can use the Document Management task pane directly from Word to access many Office SharePoint Server 2007 features. For example, you can create a document on a SharePoint site to exchange information (**New!**).

## What You'll Do

**Configure and Launch Groove**

**View the Groove Window**

**Set General Preferences**

**Create a Groove Workspace**

**Invite Others to a Workspace**

**Deal with Groove Alerts**

**Share Files in a Workspace**

**Hold a Discussion**

**Add Tools to a Workspace**

**Set Calendar Appointments**

**Manage Meetings**

**Work with Forms**

**Track Issues**

**Create a Picture Library**

**Add a Contact**

**Send a Message and Chat with Others**

**Share Files with SharePoint**

**Share Files with Synchronizing Folders**

**Work with a Shared Workspace**

**Save a Document to a Document Management Server**

# Configuring Groove

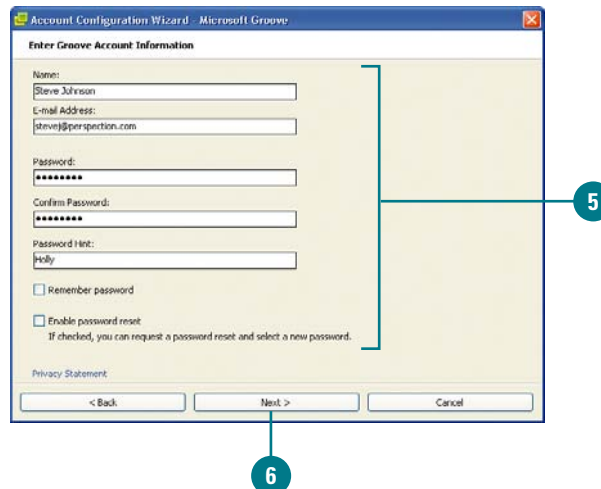
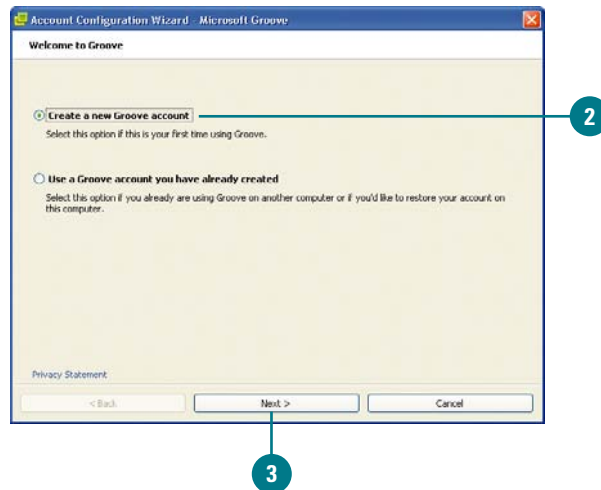
## Start, Configure, and Exit Groove

- 1 For the first time, click the **Start** button, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Groove 2007**.
- 2 Click the **Create a new Groove account** option.
- 3 Click **Next**.
- 4 Click the Account Configuration Code option you want, and then click **Next**.
- 5 Enter account information, including name, e-mail address, and password.
- 6 Click **Next**.
- 7 Click an option to list your account in the Public Groove Directory, either **No Listing** (default), **Name Only**, and **All Contact Information**.
- 8 Click **Finish**.
- 9 Click **Yes** or **No** to watch a movie about Groove.
- 10 To exit Groove, click the **Close** button on the title bar.

### Did You Know?

*You can use your account on another computer.* Click the Options menu, click Invite My Other Computers, click OK, and then copy the account file for use on another computer.

The first time you launch Microsoft Office Groove 2007, the Account Configuration Wizard appears, asking you to create a new Groove account or use an existing one already created on another computer. During the wizard process, you'll enter your Groove Account Configuration Code—for network purposes only—and Groove Account Information, including name, e-mail address, and password. If you want your Groove account to be listed in a Public Groove Directory, you can also select that option during the wizard process.



# Launching Groove

## Launch Groove from the Start Menu and Login

- 1 Click the **Start** button on the taskbar, point to **All Programs**, click **Microsoft Office**, and then click **Microsoft Office Groove 2007**.

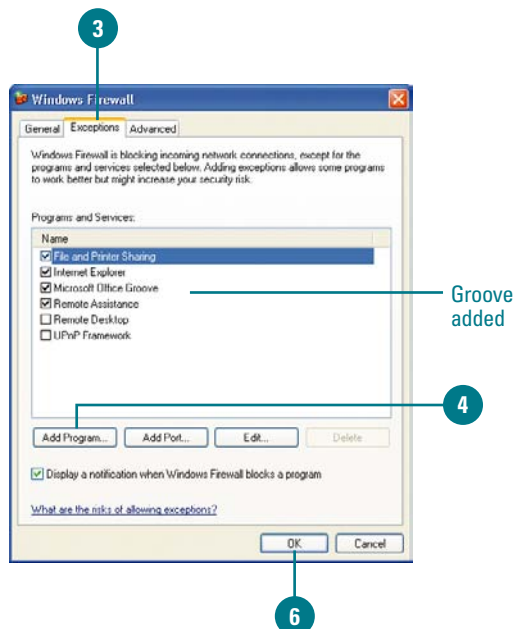
**TIMESAVER** Click the Groove icon in the notification area, and then click *Open Groove*.

- 2 Enter your password, and then click **Login**.
- 3 To logoff, click the **File** menu, and then click **Log Off Account**.

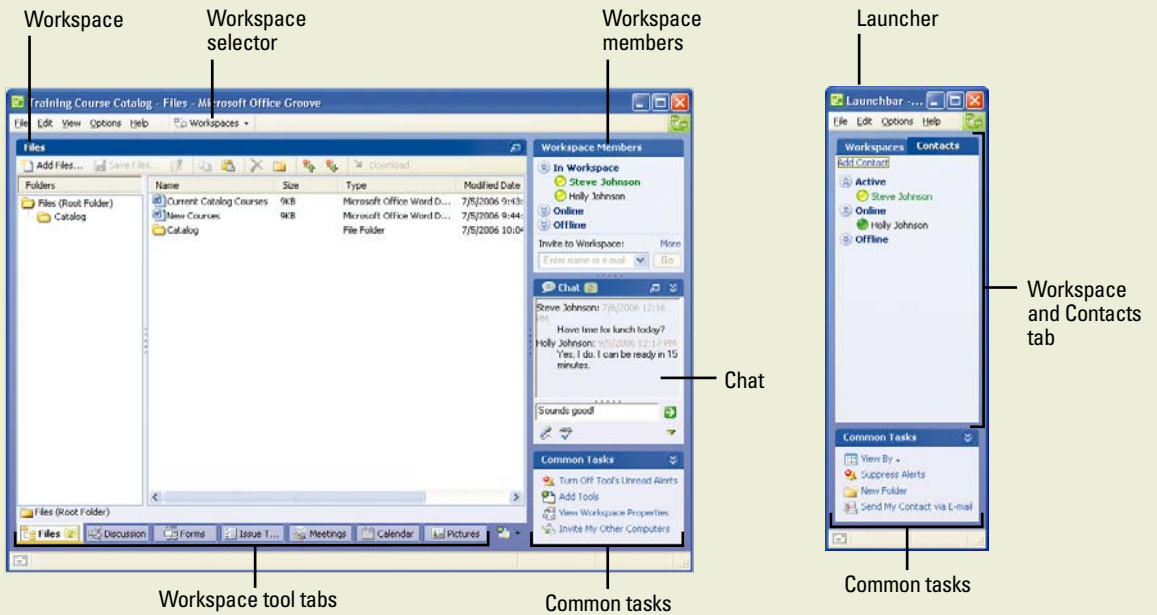
## Add Groove as a Firewall Exception

- 1 In Windows, click **Start**, and then click **Control Panel**.
- 2 Double-click the **Windows Firewall** icon.
- 3 Click the **Exceptions** tab.
- 4 Click **Add Program**.
- 5 Click **Browse**, navigate to the Programs Files folder, Microsoft Office folder, Office 12 folder, click **Groove.exe**, and then click **Open**.
- 6 Click **OK**.

Microsoft Groove 2007 allows teams to securely work together over the Internet or corporate network as if they were in the same location. Teams using Groove can remotely work with shared files and content, even when they are offline. You can launch Groove 2007 from the Start menu or from the notification area. When you start Groove, the Launchbar window opens, displaying two tabs: one for creating and managing workspaces, and one for adding and managing contacts. If you are having difficulty launching Groove, check to make sure Groove is configured as a Windows Firewall exception.



# Viewing the Groove Window



# Setting General Preferences

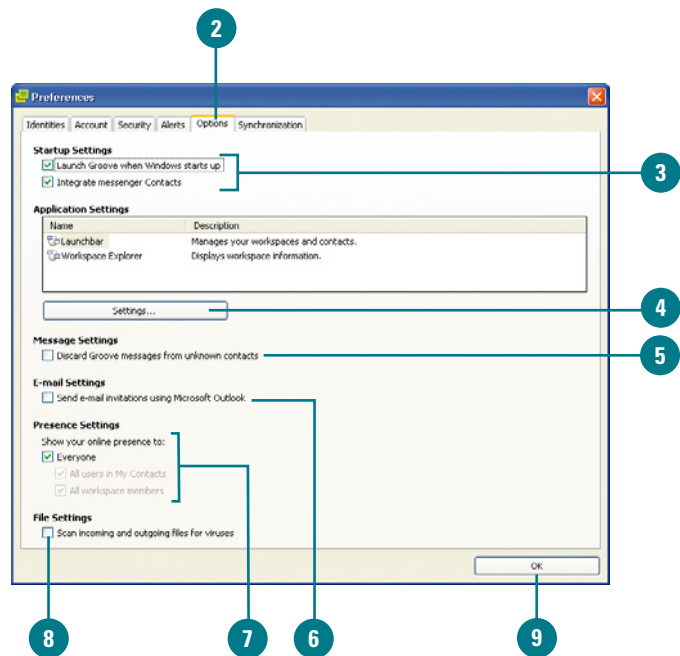
## Set General Preferences

- 1 In the Launchbar, click the **Options** menu, and then click **Preferences**.
- 2 Click the **Options** tab.
- 3 Select or clear the **Launch Groove when Windows starts up** and the **Integrate messenger Contacts** check boxes.
- 4 Click an application (Launchbar or Workspace Explorer by default), and then click **Settings**, select start up and display options, and then click **OK**.
- 5 Select or clear the **Discard Groove messages from unknown contacts** check box.
- 6 Select or clear the **Send e-mail invitations using Microsoft Outlook** check box.
- 7 Specify the online presence settings you want.
- 8 Select or clear the **Scan incoming and outgoing files for viruses** check box.
- 9 Click **OK**.

### Did You Know?

**You can set workspace properties.** In the workspace, click View Workspace Properties under Command Tasks, click the tab and select the properties you want, and then click OK.

Groove makes it easy to set program preferences all in one place by using the Preferences dialog box. You can select from six different tabs—Identities, Account, Security, Alerts, Options, and Synchronization—to specify startup and application settings, alert levels, communication policies, file and workspace restrictions, account privileges, and identity information. The Options tab allows you to set general preferences to startup Groove and related applications, like Launchbar and Workspace Explorer, and scan for viruses.



# Creating a Groove Workspace

## Create a Workspace

1 In the Launchbar, click the **File** menu, point to **New**, and then click **Workspace**.

2 Click a workspace option:

- ◆ **Standard.** Select to display the Groove Workspace Explorer and initially include the Files and Discussion Tools.

- ◆ **File Sharing.** Select to share the contents of a folder in your Windows system.

- ◆ **Template.** Select to display the Groove Workspace Explorer with the selected tools you want. Click Browse to visit a Groove Web site, where you can download templates.

3 Type a new name for the workspace.

4 Click **OK**.

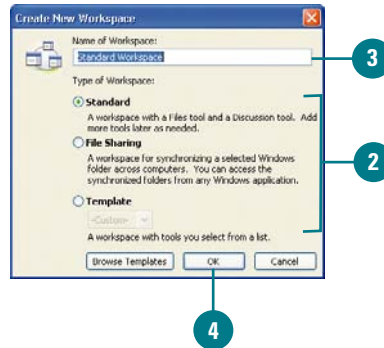
The new workspace opens in another window.

### Did You Know?

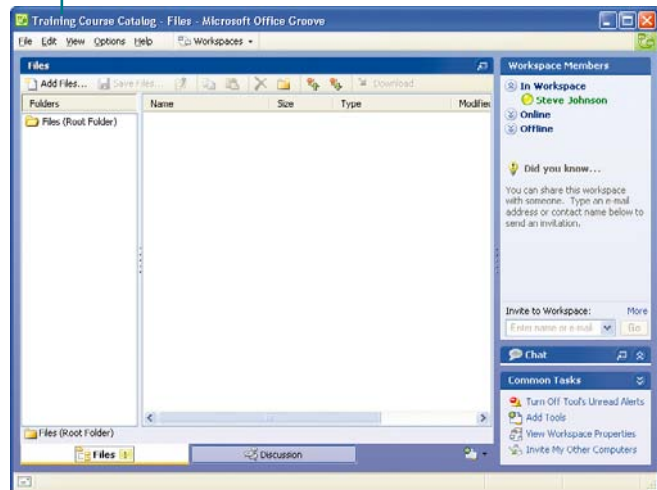
**You can delete a workspace.** In the workspace, click the File menu, point to Delete Workspace, and then click From This Computer or For All Members.

**You can save a workspace as a template or back it up.** In the workspace, click the File menu, point to Save Workspace As, and then click Template or Archive.

A Groove workspace is a special site template that provides you with tools to share and update documents and to keep people informed about the current status of the documents. After you create a workspace, you can use Files and Discussion Tools to share files, exchange messages, and collaborate with a team. In a Groove workspace, you can point to the Files or Discussion tab to display the contacts currently using a tool.



New workspace



# Inviting Others to a Workspace

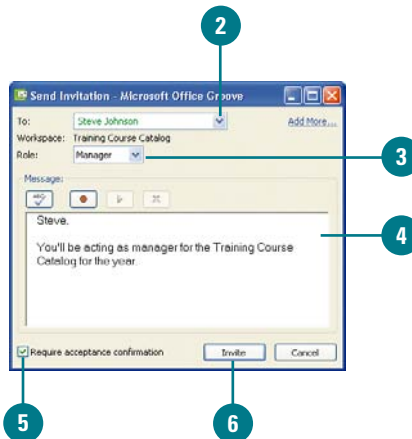
## Invite Users to a Workspace

- 1 Open the workspace, click the **Options** menu, and then click **Invite to Workshop**.
- 2 Click the **To** list arrow, and then select a user.  
  
If the user you want is not there, click **Add More**, click **Search for User**, type part of the user's name, click **Find**, select the user's name you want, and then click **Add**, and then click **OK**.
- 3 Click the **Role** list arrow, and then click a role: **Manager**, **Participant**, or **Guest**.
- 4 Enter a message.
- 5 Select the **Require acceptance confirmation** check box as a security recommendation.
- 6 Click **Invite**.  
  
Monitor your Groove alerts for status and acceptance.

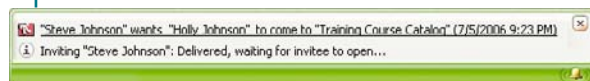
### Did You Know?

**You can change workspace roles and permissions.** In the Launchbar, click **Set Roles** under **Common Tasks**. To adjust permissions for a tool, right-click the tool tab, and then click **Properties/Permissions**.

Before you can invite someone to a Groove workspace, they need to be a Groove user. Each person you invite to a Groove workspace needs to have a role, either Manager, Participant, or Guest. Each role comes with a set of permissions that allow a user to perform certain tasks. Managers can invite others, edit existing files, and delete files or the entire workspace. Participants can edit and delete files. Guests can view existing data, but not make changes. After you send an invitation to join a workspace, check for Groove alerts in the notification area to see if the user has accepted your invitation.



Groove alert with invitation



# Dealing with Groove Alerts

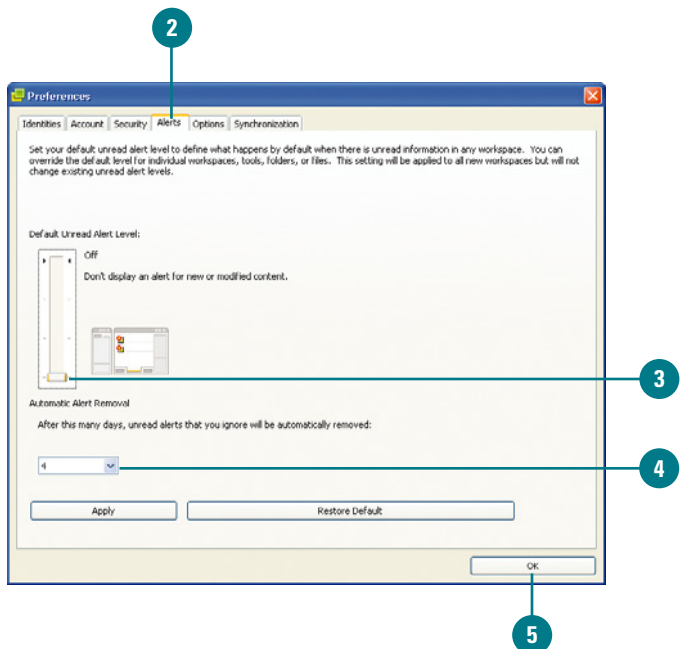
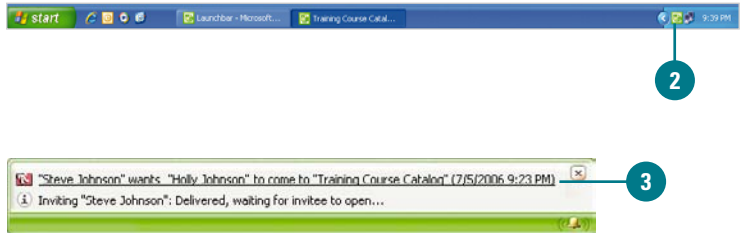
## Check for Groove Alerts

- 1 Look for a blinking message or Groove icon in the notification area.
- 2 Point to the **Groove** icon in the notification area to display the alert.
- 3 Click the alert to open Groove.

## Set Alert Options

- 1 In the Launchbar, click the **Options** menu, and then click **Preferences**.
- 2 Click the **Alerts** tab.
- 3 Drag the slider to select an alert level:
  - ◆ **Auto**. Similar to the High alert level, but auto-dismissed ignored unread alerts.
  - ◆ **High**. Highlight unread content with an icon and display an alert for all unread content.
  - ◆ **Medium**. Highlight unread content with an icon.
  - ◆ **Off**. Don't display an alert for new or modified content.
- 4 Specify the number of days you want to keep unread alerts from being removed.
- 5 Click **OK**.

Groove alerts appear as blinking messages in the lower right corner of Windows. You can check for Groove alerts by resting the pointer on the Groove icon in the notification area. Groove alerts notify you about updates and work status. For example, Groove sends you an alert when someone accepts an invitation to a workspace, sends a message, changes an existing file or adds a new file. If you're getting more alerts than you want, you can set alert options in the Preferences dialog box.



# Sharing Files in a Workspace

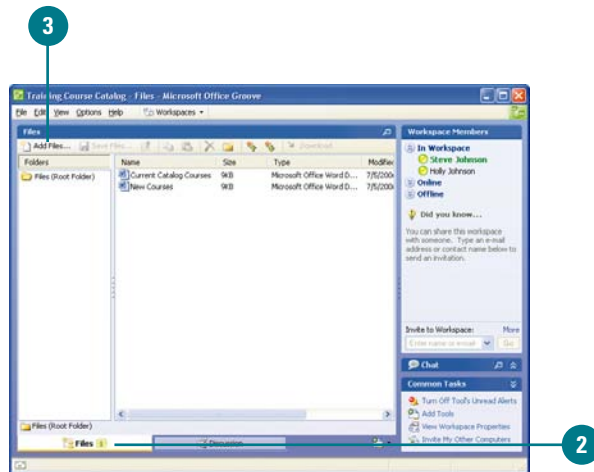


## Share Files in a Workspace

- 1 In Launchbar, double-click the workspace you want to share.
- 2 Click the **Files** tab.
- 3 Click the **Add Files** button.
- 4 Locate and select the files you want to add to the workspace.
- 5 Click **Open**.

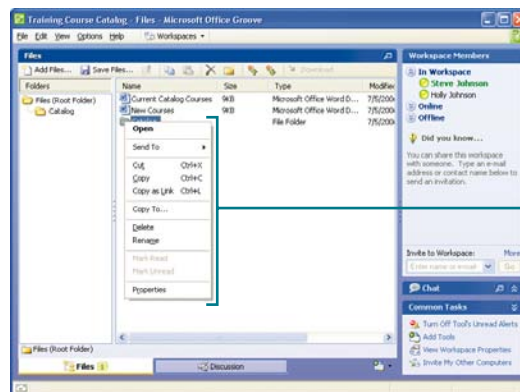
The selected files appear in the file list in the workspace.

The Files Tool in Groove allows you to share and collaborate on different types of files, including files from Microsoft Office programs. All team members of a workspace can open files that appear in the Files Tool. When a team member opens, changes, and saves a file to the workspace, Groove automatically updates the file for all other team members. When several team members work on the same file at the same time, the first person to save changes to the workspace updates the original file. If another team member saves changes to the original version, Groove creates a second copy with the editor's name.



## Manage Tools

- ◆ **New Files.** Select a folder, click the File menu, point to New, and then click a file type.
- ◆ **Open Files.** Double-click it, make and save changes, and then click Yes or No to save changes in Groove.
- ◆ **Delete Files.** Right-click, and then click Delete.
- ◆ **New Folder.** Select a folder, click the File menu, point to New, click Folder, type a name, and then press Enter.
- ◆ **Alerts.** Right-click a folder or file, click Properties, click the Alerts tab, drag slider, and then click OK.



Workspace file options

## Holding a Discussion

### Start and Participate in a Discussion

1 In Launchbar, double-click the workspace from which you want to hold a discussion.

2 Click the **Discussion** tab.

3 Click the **New** button, and then click **Topic**.

A new topic opens.

4 Type the Subject.

5 Click the **Category** list arrow, and then select a category.

If the category you want is not available, click the plus (+) sign, enter a category name, and then click OK.

6 Enter a message in the discussion box.

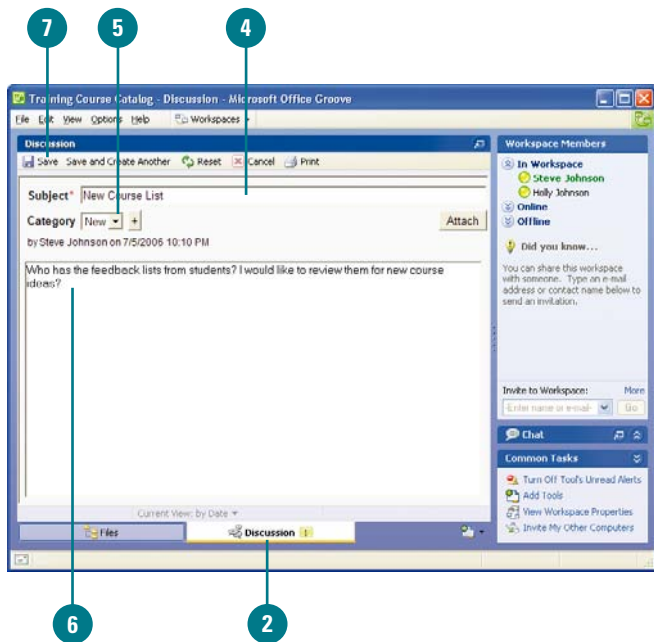
7 Click **Save** to post the message or click **Save and Create Another** to post and create a new topic.

The new discussion is displayed in the workspace.

8 To participate in a discussion, double-click the discussion within the workspace in order to respond.

When you're online, Groove synchronizes the discussion, so all workspace participants can see all new postings and topics.

The Discussion Tool in Groove allows users to post an announcement, news item, or other information for everyone working together in a standard workspace. Team members can add and view discussion items as a threaded conversation. Since the discussions are entered into a different area than the shared document, users can modify the document without affecting the collaborative discussion. Users can add changes to read-only documents and allow multiple users to simultaneously create and edit discussion items.



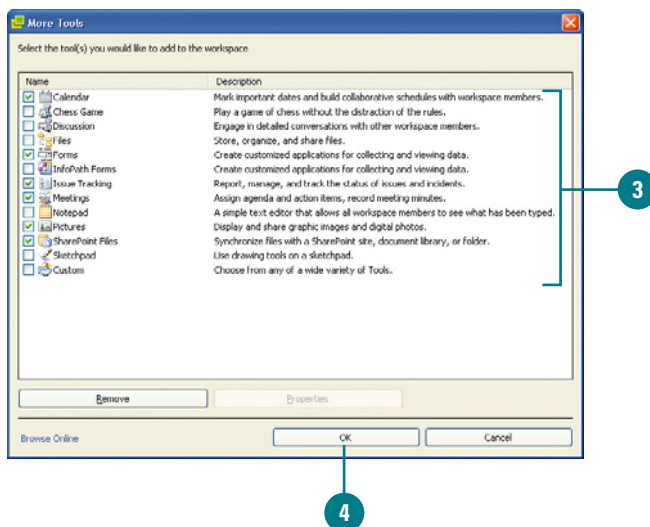
# Adding Tools to a Workspace

## Add Other Tools to a Workspace

- 1 In Launchbar, double-click the workspace you want to open.
  - 2 Under Command Tasks, click **Add Tools**.
- TIMESAVER** Click the *Add a tool to this workspace* button, and then click the tool you want.
- 3 Select the check box next to each tool you want to add.
  - 4 Click **OK**.

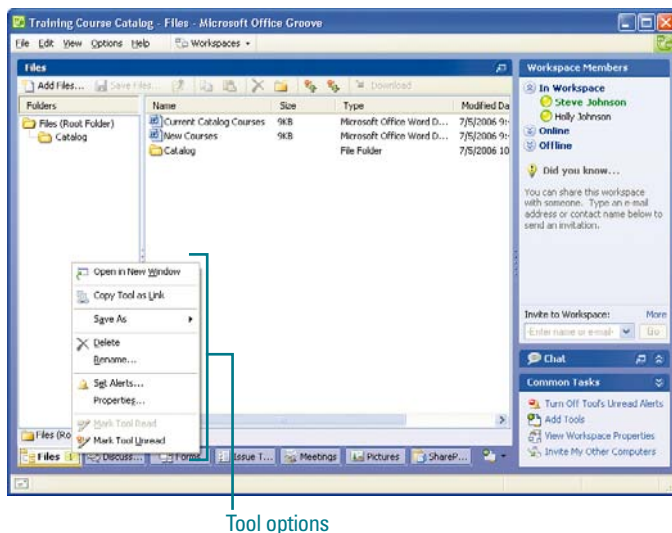
A button tab for each tool appears at the bottom of the workspace.

Like many other Office programs, Groove allows you to add functionality. Groove already comes with the Files and Discussion Tools. You can add other tools, such as InfoPath Forms, Issue Tracking, or SharePoint Files. The InfoPath Tool allows you to collect and view data. The Issue Tracking Tool lets you report on and track the status of issues and incidents. If you have access to an Office or Windows SharePoint Server, the SharePoint Files Tool allows you to synchronize files on a workspace with those on a SharePoint site, document library, or folder.



## Manage Tools

- ◆ **Delete.** Right-click the tool tab, click Delete, and then click Yes.
- ◆ **Rename.** Right-click the tool tab, click Rename, enter a new name, and then click OK.
- ◆ **Move.** Drag a tool tab name to the left or right.
- ◆ **Open in Window.** Right-click the tool tab, and then click Open in New Window.
- ◆ **Properties.** Right-click the tool tab, and then click Properties. Click a tab—General, Permissions, Alerts—to view or change properties.

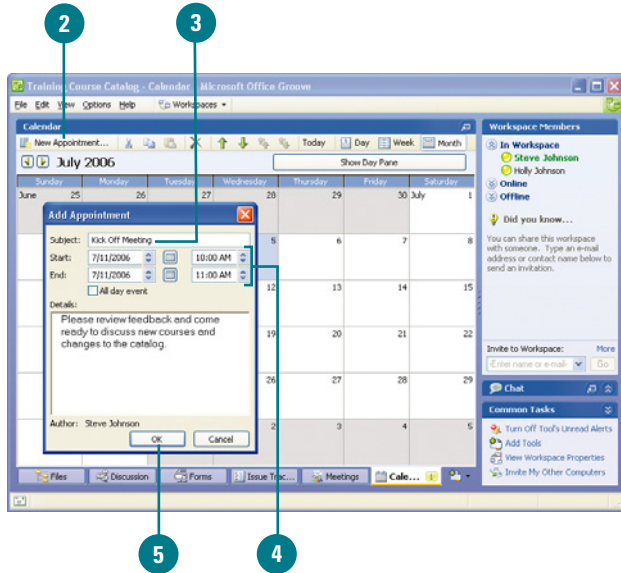


# Setting Calendar Appointments

## Add an Appointment

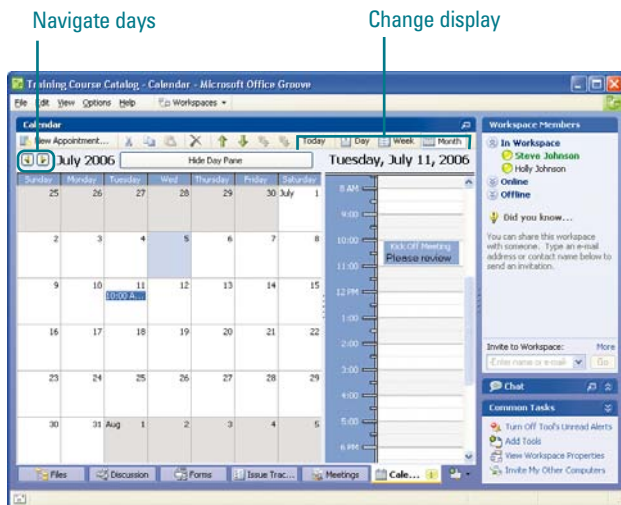
- 1 In Launchbar, double-click the workspace you want to open, and then click the **Calendar** tab.
- 2 Click the **New Appointment** button.  
**TIMESAVER** To create an appointment with pre-selected dates and times, drag across the range of dates and times you want.
- 3 Enter an appointment subject.
- 4 Fill in the start and end date and a start and end time.
- 5 Click **OK**.

Using the Calendar Tool, you can manage your time by doing much more than circling dates. The Calendar collects important information for team members by providing them with critical dates for the completion of a project. Among its many features, the Groove Calendar lets you schedule and manage project appointments and customize the Calendar view to help everyone stay on track.



## Manage Appointments and the Calendar

- ◆ **View.** Point to an appointment to display a text window.
- ◆ **Delete.** Select the appointment, and then press Delete.
- ◆ **Edit.** Double-click the appointment, make changes, and then click OK.
- ◆ **Navigate.** Click Navigate Previous or Next Appointment buttons on the toolbar, or click Navigate Previous or Next Unread buttons on the toolbar.
- ◆ **Navigate Calendar Days.** Click the Previous/Next buttons in the Calendar's title bar.
- ◆ **Change Calendar Display.** Click the Day, Week, or Month icons.

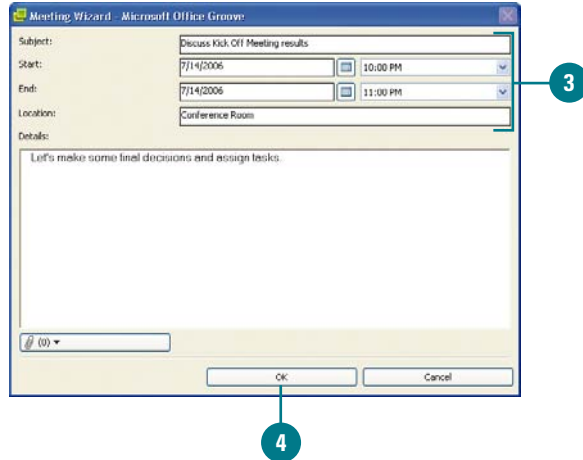


# Managing Meetings

## Create a Meeting

- 1 In Launchbar, double-click the workspace you want to open, and then click the **Meetings** tab.
- 2 Click the **New Meeting** button to start the wizard.
- 3 Enter the subject, start and end times, location and details.
- 4 Click **OK**.
- 5 Use the **Attendees** tab to select meeting attendees and appoint a chairperson and minutes-taker.

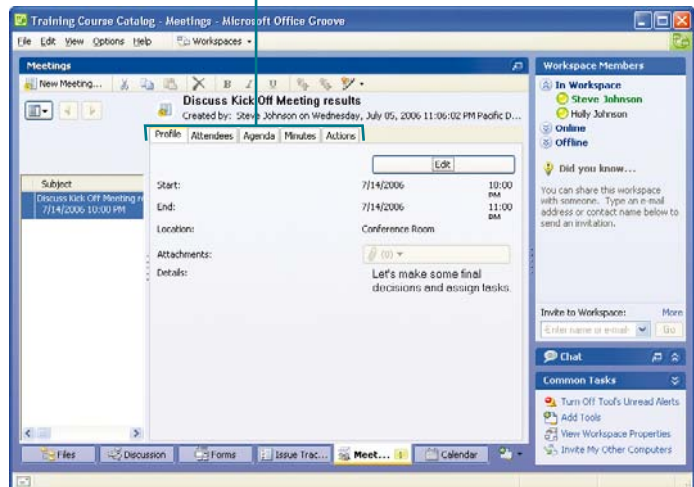
The Groove Meetings Tool helps you organize, conduct, and record meetings. Every Groove meeting includes a Meeting profile (start and end times, location, and description), Attendees list, Agenda, Minutes, and Actions, which are displayed as tabs for easy access. You can use a wizard to quickly create a meeting, and then manage all aspects of it.



## Manage a Meeting

- ◆ **Agenda.** Click the Agenda tab, click New Topic, fill in the form, and then click OK.
- ◆ **Action Items.** Click the Actions tab, click New Action Item, fill in the form, and then click OK.
- ◆ **Record Minutes.** Click the Minutes tab, click Edit, type in text or click Insert Agenda, and then save or discard your work.
- ◆ **Attendees.** Click the Attendees tab, click Edit, make changes, and then click Save and Close.
- ◆ **Navigate.** Click the Date of range options button, and then select a range of dates, or click the Previous/Next arrows.
- ◆ **Attachments.** Select a profile, agenda, or action, click Edit, click Attachments list arrow, and then click Add, Delete, Save all, or file name you want to open.

### Meeting options



# Working with Forms

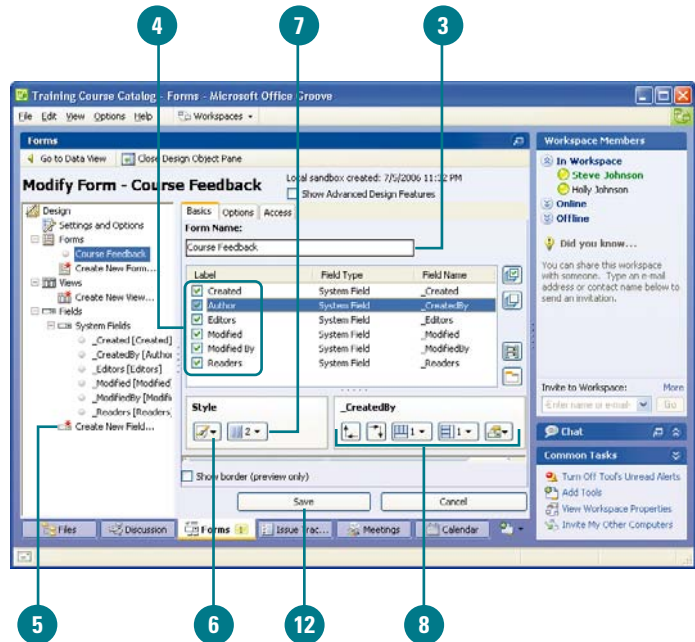
## Create a Form and View

- 1 In Launchbar, double-click the workspace you want to open, and then click the **Forms** tab.
- 2 Click the **Designer** button, and then click **Create New Form**.
  - ◆ On first run, click **Start Here**.
- 3 On the Basics tab, enter form name.
- 4 Select the check boxes with the system fields you want.
- 5 To create new fields, click **Create New Field** in the left pane, click the field type you want, click **Next**, click a property in the left pane, enter information or select options, and then click **Finish**.
- 6 Click the **Style Form** button, and then select a style.
- 7 Click **Column Number** button, and then select a number.
- 8 Select other options for defining the behavior of the fields and form.

### Did You Know?

**You can revise a form.** In the workspace, click the Forms tab, click the Designer button, point to Modify Form, click a form name, make changes, click Save, and then click Publish Sandbox to update the workspace.

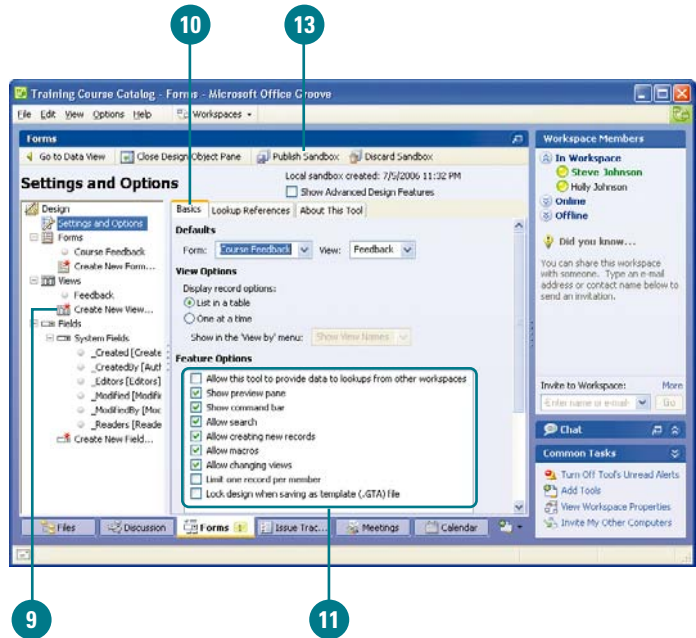
If you need to collect data as part of your project, you can use the Groove Forms Tool to create custom forms in the workspace window, or use the InfoPath Forms Tool to import forms you have already created using Microsoft Office InfoPath 2007. With Designer Access privileges, you can use the Groove Forms Tool to name the form, choose the fields, select the form style, and create a form view to view the data. You create and layout form elements in the design sandbox, which multiple team members can use to help with the design. Like working with files in Groove, your form designs are stored locally until you publish them back to the workspace.



- 9 In the left pane, click **Create New View**.
- 10 Click the **Basics** tab, and then enter a view name.
- 11 Select the check boxes with the fields you want, and other options.
- 12 Click **Save**.
- 13 Click the **Publish Sandbox** or **Discard Sandbox** button.

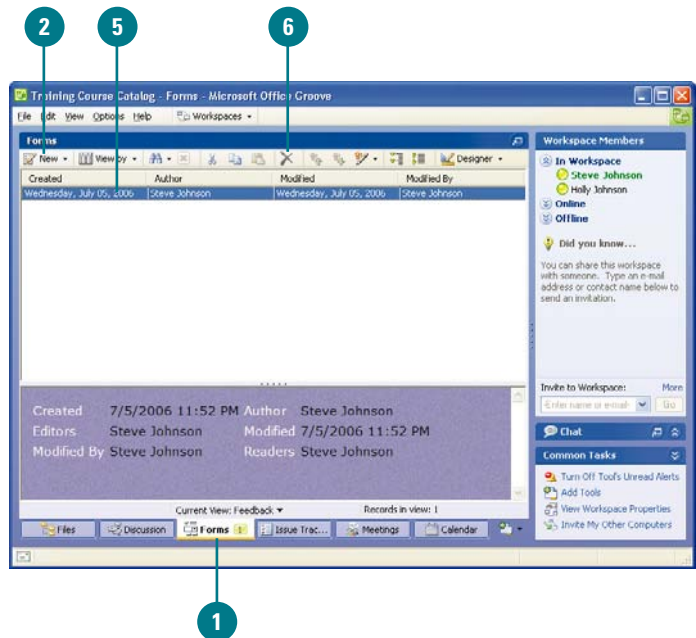
### Did You Know?

**You can change form settings and access.** In the workspace, click the Forms tab, click the Designer button, point to Modify Form, click a form name, click the Options or Access tab, select options, click Save, and then click Publish Sandbox.



## Create and Manage a Form Record

- 1 In Launchbar, double-click the workspace you want to open, and then click the **Forms** tab.
- 2 Click the **New** button, and then click the form name.
- 3 Enter form data.
- 4 Click the **Save** or **Save and Create Another** button.
- 5 To edit a form record, double-click it, make changes, and then click **Update**.
- 6 To delete a form record, click the form record, and then click the **Delete** button.

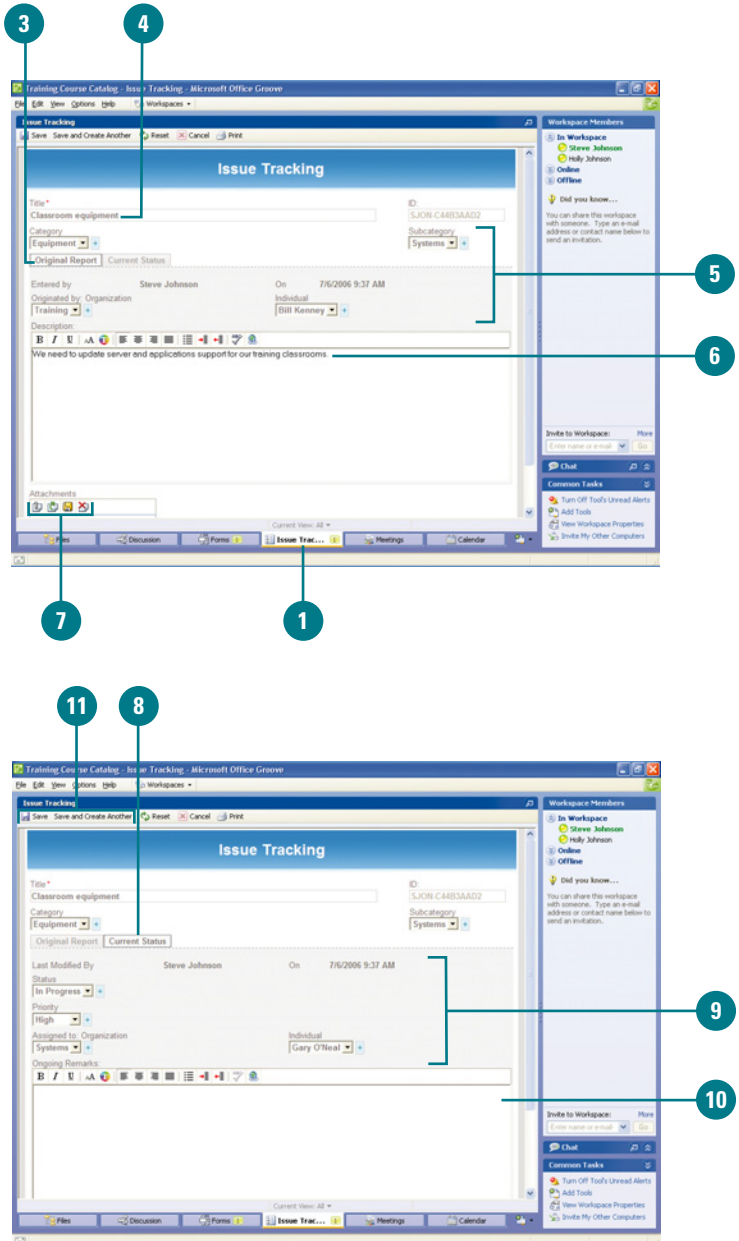


# Tracking Issues

## Track Issues Using Forms

- 1 In Launchbar, double-click the workspace you want to open, and then click the **Issue Tracking** tab.
- 2 Click the **New** button, and then click **Issue**.
- 3 Click the **Original Report** tab.
- 4 Enter a title for the issue.
- 5 Click the list arrow next to each, and then select or add an item.
  - ◆ Category.
  - ◆ Subcategory.
  - ◆ Originated by: Organization.
  - ◆ Individual.
- 6 Enter a description.
- 7 If you want to attach a file and work with it, use the Attachment buttons.
- 8 Click the **Current Status** tab.
- 9 Click the list arrow next to each, and then select or add an item.
  - ◆ Status.
  - ◆ Priority.
  - ◆ Assigned to: Organization.
  - ◆ Individual.
- 10 Enter ongoing remarks.
- 11 Click the **Save** or **Save and Create Another** button.

Tracking issues is useful for managing all phases of issue reporting and response tracking. Users can create reports, assign ownership, and track status over time. Issue Tracking is a tool designed using the Groove Forms Tool, which includes two basic form types: Issue and Response. The Issue form records issue information, owner assignment, and tracks status. The Response form records a response to an issue record.



## Manage Tools

- ◆ **Edit.** Double-click the issue, make changes, and then click Update.
- ◆ **Delete.** Select the issue record, and then click the Delete button on the toolbar.
- ◆ **Update Assignments.** As a manager, click the Run Macros button on the toolbar, and click Update Assignment - manager only.
- ◆ **Sort.** Click the column heading you want to sort by.
- ◆ **View by.** Click the View By button on the toolbar, and then select a view, such as Assignment, Category, Originator, Priority, and Status.
- ◆ **Search.** Click the Search button on the toolbar, click Search, enter the search criteria you want, and then click Search.

When you're done with the results, click the **Clear Results** button on the toolbar.

### Did You Know?

**You can set alerts for tools.** In the workspace, click any tool tab, click Set Tool Alerts under Command Tasks, drag the slider to select an alert level, and then click OK. To turn alerts off, click Turn Off Tool's Unread Alerts under Common Tasks.

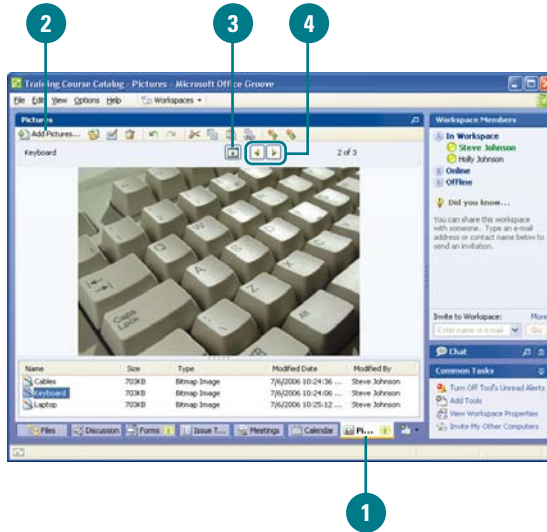
The screenshot shows a 'Form Search' dialog box titled 'Issue Tracking'. It contains several search criteria fields: 'Title\*', 'ID', 'Category' (set to 'Equipment'), 'Subcategory', 'Original Report', 'Current Status', 'Entered by', 'On', 'Originated by: Organization', 'Originated by: Individual', and 'Description'. At the bottom, there are three buttons: 'Search', 'Reset', and 'Cancel'. A blue arrow points to the 'Search' button with the text 'Click to search'. A red arrow points to the search criteria fields with the text 'Enter search criteria'.

# Creating a Picture Library

## Add and View Pictures

- 1 In Launchbar, double-click the workspace you want to open, and then click the **Pictures** tab.
- 2 To add pictures, click **Add Pictures**, and then drag and drop files into the list or copy and paste files into the list.
- 3 To show or hide picture details, click the **Show Pictures Details** or **Hide Picture Details** button.
- 4 To view pictures, click the **Previous** or **Next** buttons.

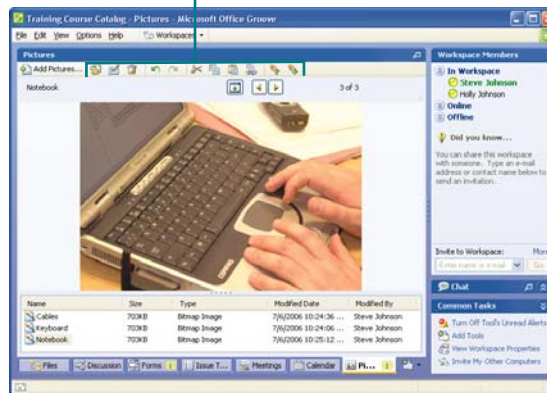
You can add the Groove Pictures Tool to a workspace to display and share picture files in JPEG (.jpg) or bitmap (.bmp) format. You can view a list of picture files that you or other team members have added to the Pictures Tool. The list also includes status information about the picture files, such as type, size, modified date, and last editor. The Pictures Tool automatically scales all pictures you add to fit the current size of the picture viewer window.



## Manage Pictures

- ◆ **Edit.** Right-click a picture, and then click Open. Your graphics program opens. Edit and save the picture, and then Yes to update in Groove.
- ◆ **Rename.** Select the picture, click the Rename button on the toolbar, type a new name, and then click OK.
- ◆ **Export.** Select the picture file, click the Export button on the toolbar, select a location, and then click Save.
- ◆ **Delete.** Select one or more pictures, and then press Delete.

Toolbar to manage pictures

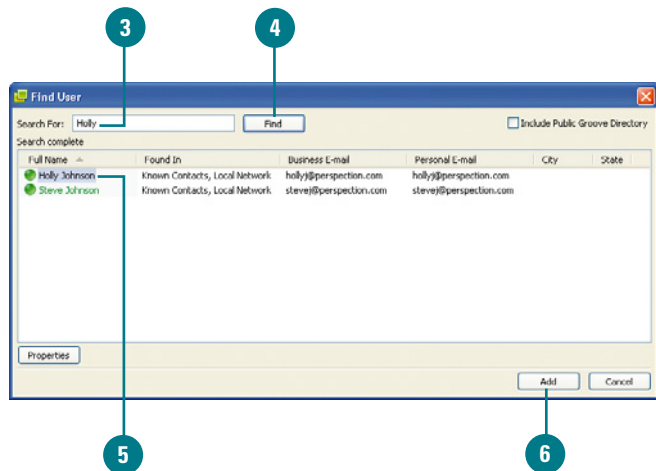


# Adding a Contact

## Add a Contact

- 1 In Launchbar, click the **Contacts** tab.
- 2 Click the **Add Contact** button.  
The Find User window opens.
- 3 Type part of the user's name.
- 4 Click **Find**.
- 5 Select the user's name you want to add as a contact.
- 6 Click **Add**.

In order to send messages or have a chat with other Groove team members, you need to add them as contacts. In the Launchbar, you can quickly and easily check for the online presence of a contact. By default, each contact appears on the Contacts tab based on status, either Active, Online, or Offline. Each icon next to a contact also indicates whether the member is online, away or offline. In a Groove workspace, you can point to the Files or Discussion tab to display the contacts currently using a tool.

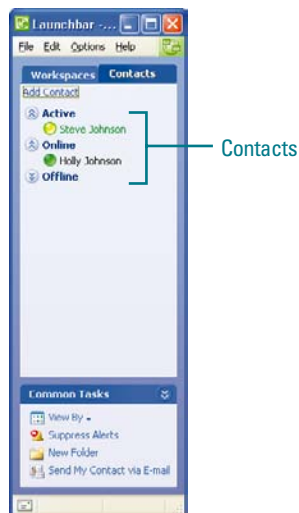


## Check the Presence of a Contact

- ◆ In the Launchbar, click the **Contacts** tab. By default, each contact appears in the Launchbar based on status, either Active, Online, or Offline. Each icon next to a contact also indicates whether the member is online, away or offline.

**TIMESAVER** To change order, click the *Options* menu, point to *View Contacts By*, and then click a sort method.

- ◆ In a Groove workspace, the tabs at the bottom of the workspace display the number of people who are actively using the tool, either Files or Discussion. To see the names of the people using a Tool, point to the tab.



# Sending a Message

## Send a Message

- 1 In Launchbar, click the **Contacts** tab.
- 2 Right-click a contact, and then click **Send Message**.

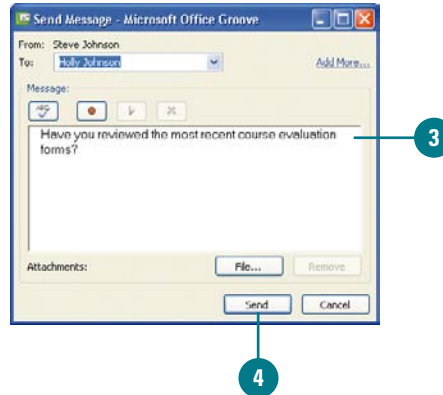
The Send Message window opens.

**TIMESAVER** Press *Shift-Shift* to open a new instant message window or bring up your next unread instant message from your inbox.

- 3 Type a message.
- 4 Click **Send**.

An alert appears, indicating your message was sent. Monitor Groove alerts for more message status.

You can send messages to other Groove contacts at any time even if you or your contact are not online. If you or your contact are offline, Groove sends the message and alerts you of delivery, when it's opened, and when your contact replies as soon as you and your contact are online.

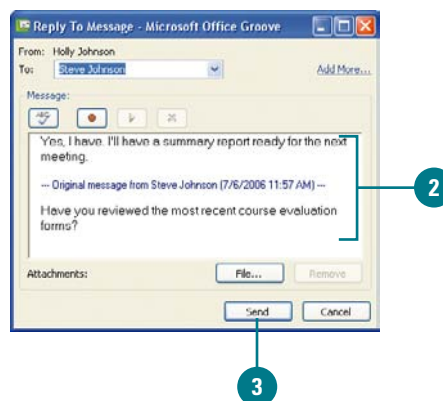


## Receive and Reply to a Message

- 1 When a Groove alert appears, indicating you have received a message, click it.
- 2 Enter your reply to the message.
- 3 Click **Send**.

An alert appears, indicating your message was sent. Monitor Groove alerts for more message status.

When the original sender received back the message, the sender can Reply, Forward, or Close the message.



# Chatting with Others

## Chat with Other Workspace Team Members

- 1 In Launchbar, double-click the workspace you want to open, and then click **Expand Chat** button next to Chat, if necessary.

**IMPORTANT** *If you are using Groove on a Tablet PC, the chat window may open by default in Ink mode. To switch to Text mode, click the Options menu (Down Arrow), and then click Switch to Text Mode.*

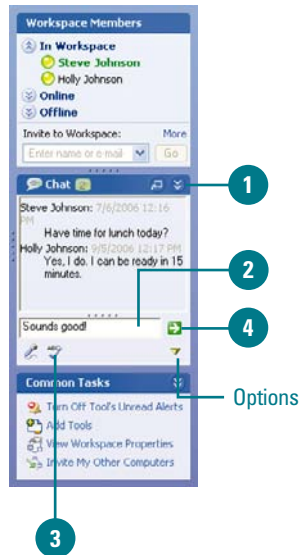
- 2 Click in the blank box at the bottom of the chat tool, located on the right side of the workspace, and then type a message.
- 3 To check spelling, click the **Check Spelling** button, and then correct any mistakes.
- 4 Click **Go**.

Your message is added to the ongoing conversation.

### Did You Know?

**You can use a microphone.** With a microphone installed on your computer, click the Microphone button, and then reply to the Audio Tuner wizard questions.

A chat is an ongoing conversation you type and send, or post. Each Groove workspace includes a chat tool, where you can communicate with others in real time or offline. The number of team members currently involved in a chat appears on the title bar. When you post a new message in the chat tool, a Groove alert notifies other team members. As each team members post messages in a workspace chat, the ongoing conversation is saved in the workspace for reference until the workspace is deleted.



# Sharing Files with SharePoint

## Set Up a SharePoint Connection

- 1 In Launchbar, double-click the workspace you want to open, and then click the **SharePoint Files** tab.
- 2 Click **Setup**.
- 3 Enter the SharePoint Server Web address, and then press Enter.
- 4 Click the library in which you want to connect.
- 5 Click **Select**.

See your Network Administrator for specifics.

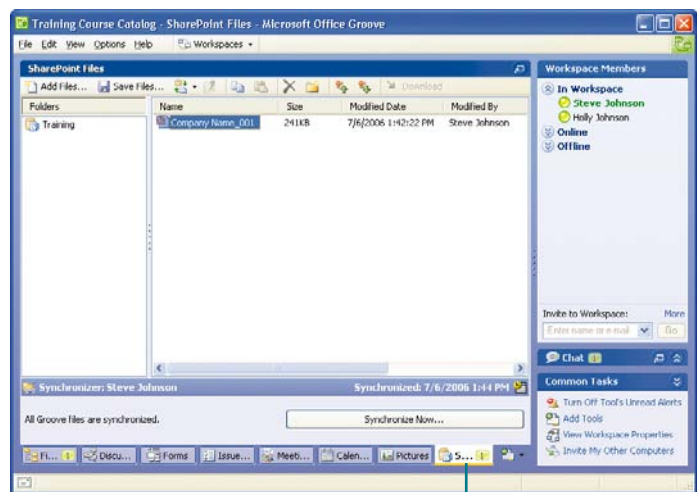
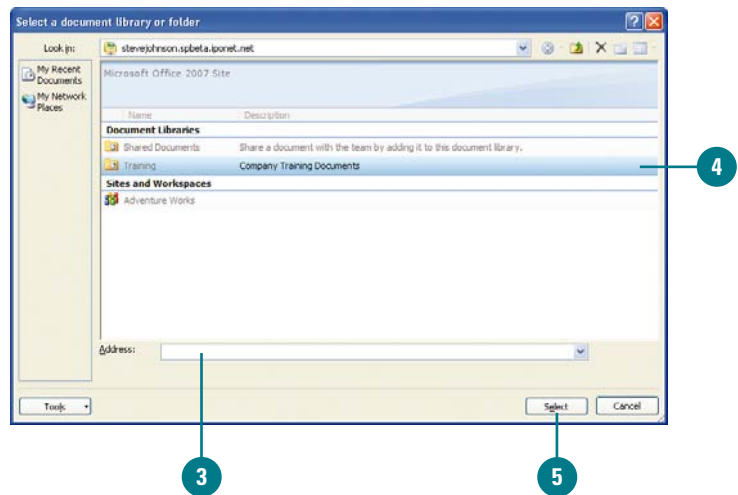
All the files in the SharePoint library are synchronized with the Groove workspace.

### Did You Know?

**You can get more information about SharePoint.** To download a complete chapter about Office SharePoint, go to [www.perspection.com](http://www.perspection.com).

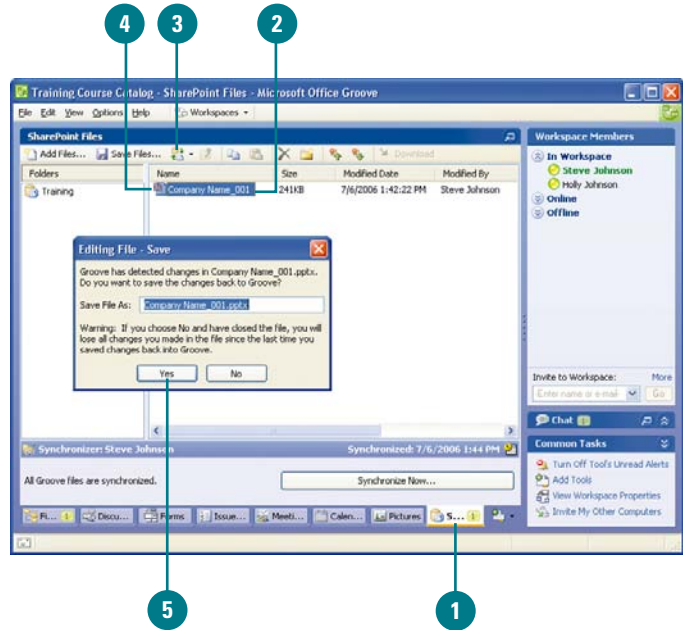
**You can set file permissions for SharePoint files.** In the workspace, right-click the SharePoint Files tab, click Properties, click the Permissions tab, select a role, select the permissions you want, and then click OK.

If you have access to an Office or Windows SharePoint Server 3.0 site, (workspace collaboration using a Web server), you can synchronize file content between Groove and SharePoint libraries. Groove uses the SharePoint Files Tool as a centralized location to work on SharePoint files and with people outside your workspace. The SharePoint Files Tool synchronizes data with workspace members in the same way as the standard File Tool. The one who sets up the SharePoint connection is the synchronizer, and is typically the workspace Owner. The synchronizer has two options: manual or automatic based on a time interval. Simply double-click a SharePoint file to edit it in its native program. As the synchronizer, you can also check out/in files to avoid conflicts with other SharePoint users while you edit a file.



## Check Out and In Files to Edit

- 1 In Launchbar, double-click the workspace you want to open, and then click the **SharePoint Files** tab.
- 2 Select the file you want to check out.
- 3 Click the **Check In/Out** button on the toolbar, and then click **Check Out from SharePoint**.
- 4 To edit a file, double-click the file to open it in its native program, make changes, save and close it.
- 5 In Groove, click **Yes** to save changes.
- 6 Click the **Check In/Out** button on the toolbar, and then click **Check In from SharePoint**.
- 7 Describe your changes, and then click **OK**.



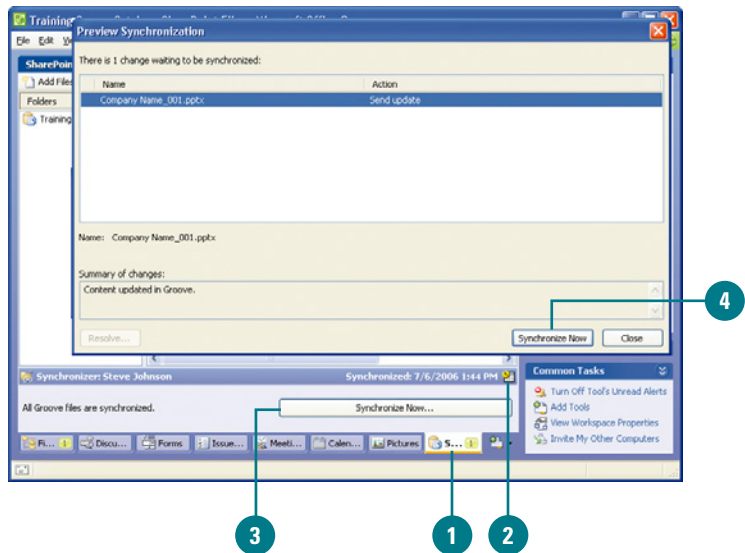
## Synchronize Files

- 1 In Launchbar, double-click the workspace you want to open, and then click the **SharePoint Files** tab.
- 2 To set synchronization options, click the **Calendar** icon, click the **Manually** or **Automatically** option, and then if necessary, specify an interval, and then click **OK**.
- 3 To manually synchronize files, click **Synchronize Now**.

The Preview Synchronization dialog box opens.

- 4 Click **Synchronize Now**.

Resolve any conflicts that arise. If necessary, click **Resolve**, select another file version, and then click **OK**.

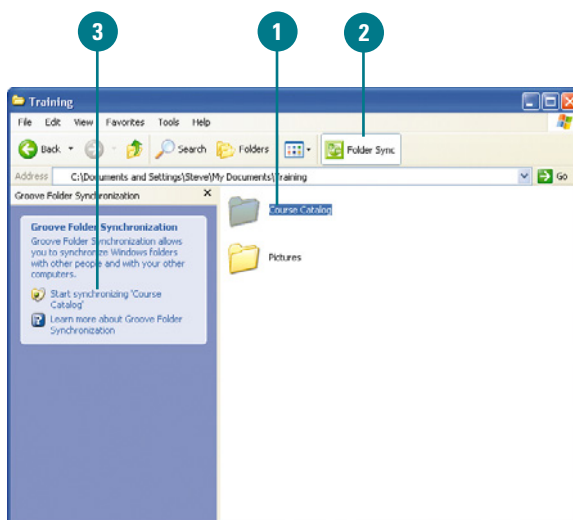


# Sharing Files with Synchronizing Folders

## Synchronize Local Folders

- 1 In Windows Explorer, click the folder you want to share as a GFS folder.
- 2 Click the **Folder Sync** button.  
The Groove Folder Synchronization pane replaces the Windows Folder pane.
- 3 Click **Start synchronizing 'foldername'**.
- 4 Click **Synchronize Now**, if necessary, to continue from the preview synchronization.
- 5 Click **Yes** to confirm the folder share.
- 6 Use commands in the Groove Folder Synchronization pane to view the details of the file sharing workspace, view members of the workspace, send workspace invitations, mark folders read or unread, and set workspace and folder properties.
- 7 In Groove, click the **Workspace** tab to access the GFS folder, and view read and unread files.

Instead of using the File Tool in Groove, you can use Groove Folder Synchronization (GFS) in Windows to make sure all changes within a folder are shared between users and kept up-to-date. You create GFS folders in your Windows file system using Windows Explorer. GFS folders are separate from workspaces and currently have a 2 gigabyte size limit. Files shared in Groove workspaces are stored in an encrypted format, while files in a GFS folder are only encrypted during transmission between computers. Any new files added to a synchronized folder are automatically shared with other team members to ensure a secure environment. In Windows Explorer, you can use the Groove Folder Synchronization pane to view the details of the file sharing workspace, view members of the workspace, send workspace invitations, and set workspace and folder properties.

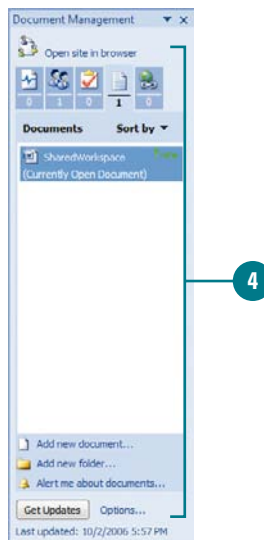
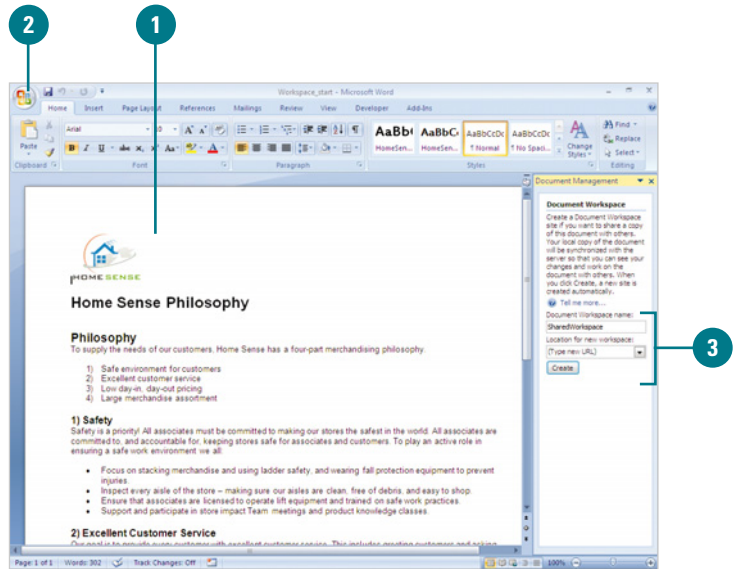


# Working with a Shared Workspace

## Work with a Shared Workspace

- 1 In Word, open the document you want to share.
- 2 Click the **Office** button, point to **Publish** (to create) and then click **Create Document Server**, or point to **Server** (to modify), and then click **Document Management Server**.
- 3 To create a workspace, type a name for the site, type the URL or network location, and then click **Create**.
- 4 Use the Document Management task pane tools.
  - ◆ **Status.** Displays the checked-in/checked-out status of your current document.
  - ◆ **Members.** Shows you who is online from your Team Members Group. You can add new members and send e-mail message to members.
  - ◆ **Tasks.** Shows you the tasks assigned for this document and the completion status. You can add new tasks, create alerts, and view workflow tasks.
  - ◆ **Documents.** Displays the name and workspace of the selected document. You can add new documents and folders, and alert me about documents.
  - ◆ **Links.** Displays links to files, folders, and resources. You can add new links and alerts.

A **Document Workspace** is an Office SharePoint site template that provides you with tools to share and update documents and to keep people informed about the current status of the documents. Using icons on the Document Management task pane, you can connect to an Office SharePoint Server directly from Word. Each icon displays different information relating to your document: Status, Members, Tasks, Document, and Links. Users can show current tasks, view the status of a document, see the availability of a document, display properties of a document, and list additional resources, folders, and privileges.



# Saving a Document to a Document Management Server

## Save a Document to a Document Management Server

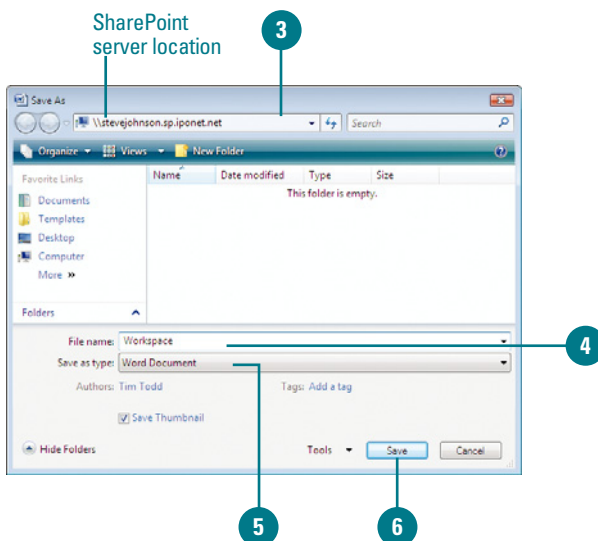
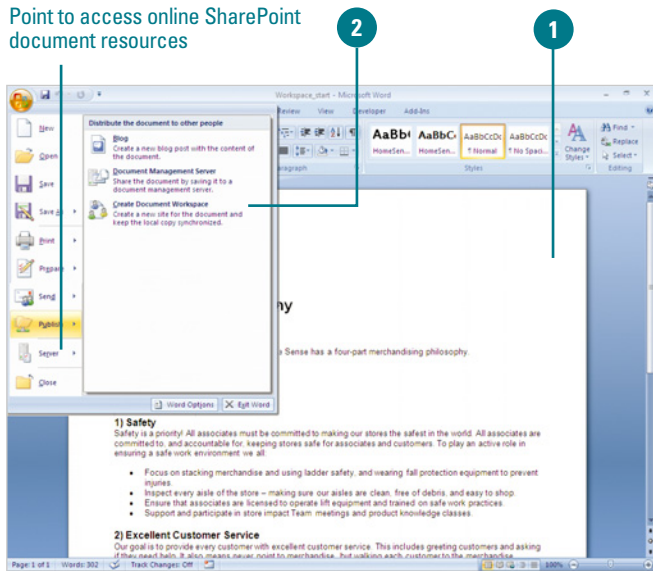
- 1 In Word, open the document you want to save to a Document Management Server.
- 2 Click the **Office** button, point to **Publish**, and then click **Document Management Server**.
- 3 Navigate to the network folder location on the SharePoint server where you want to save the file.
- 4 Type a document file name.
- 5 If necessary, click the **Save as type** list arrow, and then click **Word Document**.
- 6 Click **Save**.

### Did You Know?

*You can access SharePoint resources from Word.* After you save or publish a document to a SharePoint Server site, you can click the Office button, and then point to Server to access other server related commands: View Version History, View Workflow Tasks, and Document Management Information.

You can save documents to a Document Management Server, such as a Document Library on an Office SharePoint site, or another Web location in a similar way that you save documents on your hard disk. After you save the document for the first time using the Document Management Server command, you can click the Save button on the Quick Access Toolbar as you do for any document to update the document on the site. If you save a file to a library that requires you to check documents in and out, the SharePoint site checks it out for you. However, you need to check the document in when you're done with it. If the site stores multiple content types, you might be asked to specify the content type.

Point to access online SharePoint document resources



# Workshop

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## Introduction

The Workshop is all about being creative and thinking outside of the box. These workshops will help your right-brain soar, while making your left-brain happy; by explaining why things work the way they do. Exploring possibilities is great fun; however, always stay grounded with knowledge of how things work.

### Getting and Using the Project Files

Each project in the Workshop includes a start file to help you get started with the project, and a final file to provide you with the results of the project so you can see how well you accomplished the task.

Before you can use the project files, you need to download them from the Web. You can access the files at [www.perspection.com](http://www.perspection.com) in the software downloads area. After you download the files from the Web, uncompress the files into a folder on your hard drive to which you have easy access from Microsoft Office Word 2007.

## Project 1: Creating a Form with Content Controls

**Skills and Tools:** Use content controls to create a form

Forms are an easy way for you to interact with users of your documents, either online or in print, and gain information and feedback from them in the process. Content controls are predefined fields or set of fields that contain information you can use throughout a document. Word includes many different types: text boxes (Rich Text and Text), picture, date picker, combo boxes, drop-down lists, and building block gallery. The fields display information you provided in Document Properties or a placeholder, which you can fill in. After you insert the fields you want, you can change field properties to customize the form. When you're done with the form, you can group the document text to the content controls to prevent a user from accidentally making changes to the document text.

### The Project

In this project, you'll learn how to create a form, add content controls, change properties, and group the results to protect the document text, yet allow the content controls to change.

## The Process

- 1 Open Word 2007, open **Form\_start.docx**, and then save it as **Form\_results.docx**.
- 2 Click the **Developer** tab.
  - ◆ To turn on the Developer tab, click the Office button, click Word Options, click Popular in the left pane, select the Show Developer tab in the Ribbon check box check box, and then click OK.

- 3 Click the **Design Mode** button.
- 4 Click to place the insertion point to the right of the text *Date of report*:
- 5 Click the **Date Picker** button in the Controls group.
- 6 Click to place the insertion point to the right of the text *Report filled out by*:

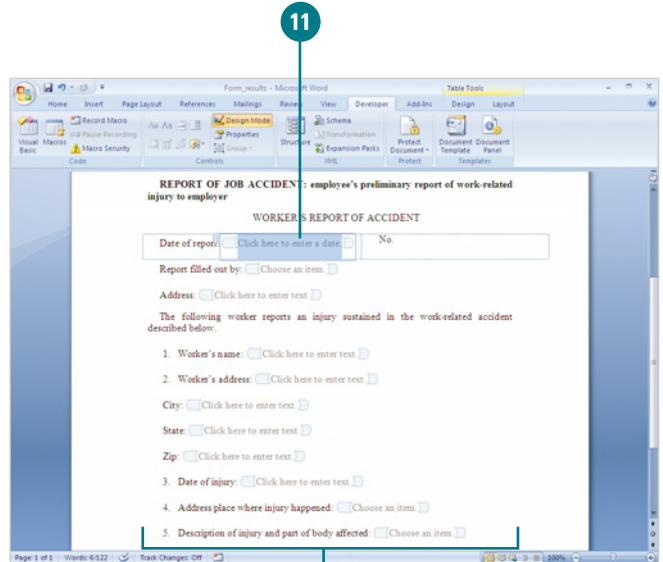
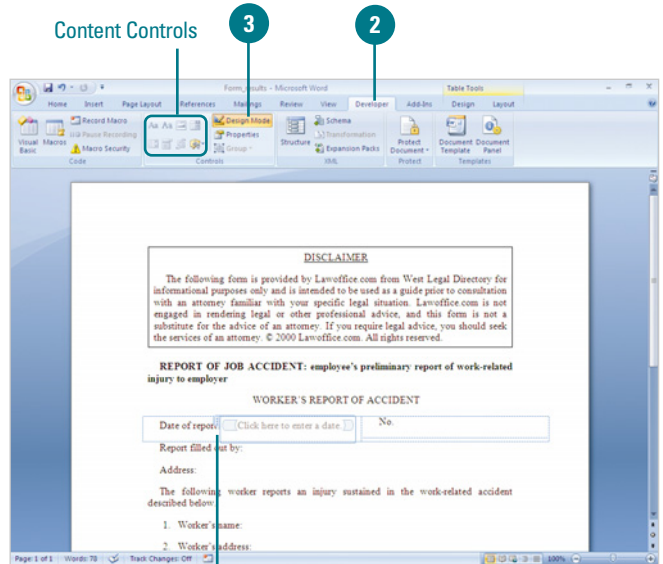
- 7 Click the **Drop-Down List** button in the Controls group.
- 8 Click to place the insertion point to the right of the text *Address*:
- 9 Click the **Rich Text** button in the Controls group.

- 10 Use the Rich Text button and the Date Picker button to insert a text or date control for the rest of the elements in the form that end with a colon.

- ◆ If you need to delete a control, right-click the control, and then click Remove Content Control.

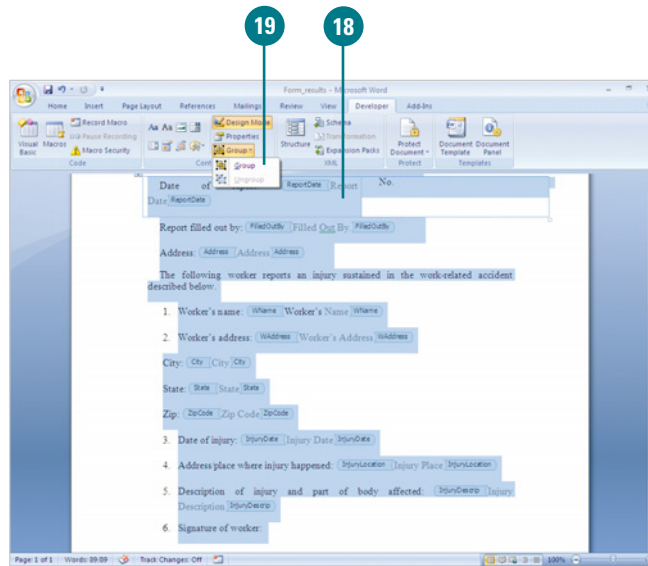
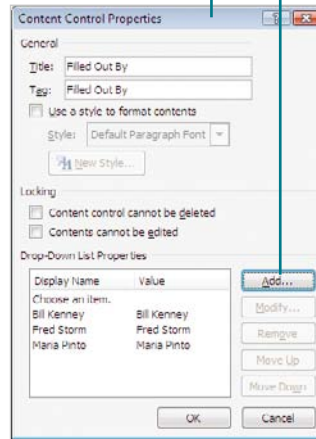
- 11 Select the text *Click here to enter a date* in the control to the right of the text *Date of report*:

- 12 Type **Report Date**.



- 13 Select the text in each one of the controls and enter an appropriate name for the data item.
- 14 Select the control next to the text *Report filled out by:*
- 15 Click the **Properties** button.
- 16 Click **Add**, and enter a display name of your choice for the drop-down list, and then click **OK**. Add in two other names of your choice. When you're done adding names, click **OK**.
- 17 Set properties for all the controls providing a title and XML tag (label) for each one. For the date controls, you can also specify the format you want.
- 18 Select all the text in the document.
- 19 Click the **Group** button, and then click **Group**.
- 20 When you're done, click the **Design Mode** button.
- 21 Enter information of your choice in the content controls for the form. Try to change the standard text in the document. Grouping the text and controls provides a protection against anyone from accidentally changing the text.
- 22 Click the **Save** button on the Quick Access Toolbar.

### Drop Down List Properties



## The Results

**Finish:** Compare your completed project file with the results file [FormControls\\_results.docx](#).

## Project 2: Viewing XML Data in a Document

### Skills and Tools: View XML data in a Word 2007 document

XML data is stored in document parts using the Office XML file formats; for Word the XML file format is .docx. Document parts help define sections of the overall contents of the file. The file format consists of many different types of document parts, including custom XML data part. All document content associated with an XML element maps to data in a custom XML data part. This separation of the XML from the document formatting and layout—known as the Open Packaging Convention (**New!**)—makes it easier to access data. To view the document parts (which is a compressed zip package), add .zip to the end of the document name after the .docx, and then double-click the renamed file. The contents of the file appear, displaying a tree structure of individual document parts.

### The Project

In this project, you'll learn how to view the XML data in an Office document by opening the ZIP package.

### The Process

- 1 Open Word 2007, open **ViewXML\_start.docx**, and then save it as **ViewXML\_results.docx**.
- 2 Exit Word and navigate to the location where you saved the file ViewXML\_results.docx.
- 3 Right-click the file, and then click **Rename**.
- 4 Add **.zip** to the end of the file name. (ViewXML\_results.docx.zip), and then press Enter.
  - ◆ Make sure a Zip utility is installed on your computer, and the .zip extension is associated with the program.
- 5 Double-click the file with the .zip extension.

The ZIP utility opens and you can see the document parts that are included in the file.

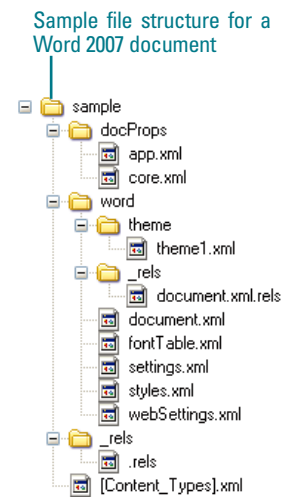
- 6 Navigate through the folders to locate the item1.xml file.
- 7 Double-click the item1.xml file to view the XML contents in the associated viewer. In this case, Internet Explorer.

You can see the data entered while in Word in XML form.

- 8 Close Internet Explorer.

### The Results

**Finish:** Compare your completed project file with the results file **ViewXMLData\_results.docx**.



## Want More Projects

You can access and download more workshop projects and related files at [www.perspective.com](http://www.perspective.com) in the software downloads area. After you download the files from the Web, uncompress the files into a folder on your hard drive to which you have easy access from your Microsoft Office program.

### Get Everything on CD

Instead of downloading everything from the Web, which can take a while depending on your Internet connection speed, you can get all the files used in this book and much more on the Microsoft Office 2007 On Demand CD. The CD contains task and workshop files, tips and tricks, keyboard shortcuts, transition helpers from 2003 to 2007, and other goodies from the author.

To get the Microsoft Office 2007 On Demand CD, go to [www.perspective.com](http://www.perspective.com).



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# New! Features

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## Microsoft Office Word 2007

Microsoft Office Word 2007 is a powerful word-processing program that enables you to easily compose and edit documents for print or online use. Word 2007 contains many new tools specifically designed to improve the way you interact with the program, and the way you collaborate with one another in preparing documents. With enhancements to the user interface, and the addition of advanced tools, page layout, SmartArt graphics, Office themes and Quick Styles for text, shapes, tables, and pictures, you can accomplish a variety of business or personal tasks more easily in Office Word 2007.

## Only New Features



If you're already familiar with Microsoft Office Word 2003, you can access and download all the tasks in this book with Microsoft Office Word 2007 New Features to help make your transition to the new version simple and smooth. The Microsoft Office Word 2007 New Features as well as other 2003 to 2007 transition helpers are available on the Web at [www.perspection.com](http://www.perspection.com).

## What's New

If you're searching for what's new in Office Word 2007, just look for the icon: **New!**. The new icon appears in the table of contents and throughout this book so you can quickly and easily identify a new or improved feature in Office Word 2007. The following is a brief description of each new feature and its location in this book.

## Office 2007

- ◆ **Ribbon (p. 4)** The Ribbon is a new look for Office 2007. It replaces menus, toolbars, and most of the task panes found in Office 2003. The Ribbon is comprised of tabs with buttons and options that are organized by task.
- ◆ **Live Preview (p. 4)** A gallery displays graphical options on the Ribbon. When you point to a gallery on the Ribbon, Office programs display a live preview of the option change so that you can see exactly what your change will look like before committing to it.

- ◆ **KeyTip (p. 4)** If you prefer using the keyboard instead of the mouse to access commands on the Ribbon, you can use KeyTips. Simply press and release the  or  key to display KeyTips over each feature, and then continue to press the letter shown in the KeyTip until you press the one that you want to use.
- ◆ **Office button and menu (p. 5)** The Office button and menu replaces the File menu with a revised list of commands and options, such as the Recent Documents list.
- ◆ **Quick Access Toolbar and Mini-Toolbar (p. 6-7, 62, 384)** Office includes its most common commands, such as Save and Undo, on the Quick Access Toolbar. The Mini-Toolbar appears above selected text and provides quick access to formatting tools.
- ◆ **Dialog Box Launcher (p. 8, 10)** Dialog Box Launchers are small icons that appear at the bottom corner of some groups on the Ribbon. When you point to a Dialog Box Launcher, a ScreenTip with a thumbnail of the dialog box appears to show you which dialog box opens when you click the Dialog Box Launcher.
- ◆ **Status bar (p. 9, 215)** The Status bar displays the on/off status of features, such as signatures and spelling, and determines what information appears on the bar.
- ◆ **Spotlight (p. 38)** The Spotlight section under the Featured category in the New Document dialog box, highlights new content from Microsoft Office Online.
- ◆ **Pin or unpin documents (p. 12-13)** Office Similar to the Windows Start menu, the Recent Documents list allows you to pin documents to the list that you want to remain accessible regardless of recent use.
- ◆ **Compatibility mode (p. 15, 22)** When you open an Office document from Office 97-2003, Office 2007 goes into compatibility mode where it disables new features that cannot be displayed or converted well by previous versions.
- ◆ **Save in XML-based file format (p. 22-25)** Office 2007 saves files in an XML (Extensible Markup Language) based file format. The XML-based format significantly reduces file sizes, provides enhanced file recovery, and allows for increased compatibility, sharing, reuse, and transportability.
- ◆ **Check compatibility (p. 26)** The Compatibility Checker identifies the potential loss of functionality when you save an Office 2007 document in a previous version file format.
- ◆ **Document Information Panel (p. 27, 418)** You can view or edit standard document properties or create advanced custom properties by using the Document Information Panel, which is an XML-based Microsoft InfoPath 2007 form hosted in the Office program.
- ◆ **View selector (p. 28)** You can quickly switch between program views using buttons in the lower-right corner of the program window.
- ◆ **Diagnose problems (p. 32-33)** The Diagnose command improves performance by diagnosing and repairing problems, such as missing files from

setup, corrupted file by malicious viruses, and registry settings.

- ◆ **Themes (p. 97-106)** A theme is a set of unified design elements that provides a consistent look for a document by using color themes, fonts, and effects, such as shadows, shading, and animations. You can use a standard theme or create one of your own.
- ◆ **Picture Quick Styles (p. 110)** The Picture Quick Style gallery provides a variety of different formatting combinations.
- ◆ **Apply a shape to a picture (p. 111)** You can now select a picture and apply a shape to it.
- ◆ **Picture effects (p. 113)** You can now change the look of a picture by applying effects, such as shadows, reflections, glow, soft edges, and 3-D rotations.
- ◆ **Recolor Picture Quick Styles (p. 118-119)** The Recolor Picture Quick Style gallery provides a variety of different formatting combinations.
- ◆ **SmartArt graphics (p. 126-134)** SmartArt graphics allow you to create diagrams that convey processes or relationships. Office provides a variety of built-in SmartArt graphic types, including organization charts, graphical lists, process, cycle, hierarchy, relationship, matrix, and pyramid.
- ◆ **Table Quick Styles and effects (p. 146-148)** The Table Quick Style gallery provides a variety of different formatting combinations. You can change the look of a table by applying effects, such as shadows, reflections, glow, soft edges, 3-D rotations, and transformations.
- ◆ **Added chart types and effects (p. 146-148, 154-155)** Office added more built-in chart layouts and styles to make charts more appealing and visually informative.
- ◆ **Microsoft Excel used to create charts (p. 151)** Office programs now use Microsoft Excel to embed and display a chart instead of Microsoft Graph.
- ◆ **Chart template (p. 160)** You can now create a chart template (.crtx) to save a chart style for use in other documents.
- ◆ **Shape Quick Styles (p. 178-180)** You can quickly add different formatting combinations to a shape using Shape Quick Styles. You can also change individual styles by applying shadows, reflections, glow, soft edges, bevels, and 3-D rotations.
- ◆ **Common spell checking and dictionary (p. 262-267)** Microsoft Office 2007 programs share a common spell checker and dictionary, so you only need to make additions and changes once.
- ◆ **English Assistant (p. 269)** The English Assistant is a Microsoft Office Online service that helps people for whom English is a second language write professional English text.
- ◆ **Document Inspector (p. 304-305)** The Document Inspector uses inspector

modules to find and remove any hidden data and personal information specific to the modules that you might not want to share with others.

- ◆ **Information Right Management (p. 312-313)** If you want to view or change the permissions for a document, you can use the Change Permission button on the Message Bar or the IRM icon button on the Status bar.
- ◆ **Add-ins and ActiveX controls (p. 322-323, 392, 415, 417)** Office includes several pre-built ActiveX controls, including a label, text box, command button, image, scroll bar, check box, option button, combo box, list box, and toggle button that you can insert into your documents to add functionality.
- ◆ **Message Bar (p. 325, 408-409)** The Message Bar appears based on Trust Center security settings to protect your computer from harmful attacks.
- ◆ **Microsoft Office safe mode (p. 328)** Microsoft Office 2007 uses two types of safe modes—Automated and User-Initiated—when it encounters a problem. Safe mode only loads minimal features to help start the Office program.
- ◆ **Mark an Office document as final (p. 330)** The Mark as Final command makes an Office 2007 document read-only and disables or turns off typing, editing commands, and proofing marks.
- ◆ **Create a PDF or XPS (p. 365-366)** You can now save a document as a PDF or XPS file, which is a fixed-layout format that retains the form you intended on a computer monitor or printer.
- ◆ **Microsoft Office Document Imaging (p. 386-387)** With Microsoft Office Document Imaging, you can now add annotations to a scanned document image, such as a fax.
- ◆ **Developer tab (p. 399)** The Developer tab is a specialized Ribbon that you can use to access developer controls, write code, or create macros.
- ◆ **Macros (p. 407-409)** If you add a macro to a document, you need to save it with a file name extension that ends with an “m”. For Word, either Word Macro-Enabled Document (.docm), or Word Macro-Enabled Template (.dotm).
- ◆ **Microsoft Office Groove (p. 420-442)** With Office Groove 2007 (an enterprise program), you can bring a team, tools, and information together from any location to work on a project.
- ◆ **Document Management Server and SharePoint (p. 443-444)** You can save your documents to a Document Management Server, such as a Document Library on an Office SharePoint site that provides you with tools to share and update documents and to keep people informed about the current status of the documents using a workflow and validation process.

## Word 2007

- ◆ **Reading Highlight button (p. 68-69)** The Reading Highlight button highlights items found using the Find and Replace commands to make them easier to read.

- ◆ **Style sets (p. 87-89)** Word provides different style sets to make it easy to format text. Each style set consists of a variety of different formatting style combinations, which you can view using the Quick Style gallery.
- ◆ **Quick Tables (p. 146-147)** A QuickTable is a predefined table that you can quickly insert into a document. The predefined QuickTables include calendars and other specific table layouts, such as double table, matrix, or tabular list.
- ◆ **Quick Parts (p. 172-173, 218-221, 236-237)** A Quick Part (also called building blocks) is a defined field or set of fields—including Author, Company, Company Address, E-mail, and Status—that contains information you can use throughout a document. The Equations, Headers and Footers, and AutoText galleries are part of Word’s building block approach to creating customized documents.
- ◆ **Cover page (p. 216)** You can quickly select a cover page from a gallery of styles that fit your document. Each cover page includes text boxes sample text and defined fields that get filled in with information from document properties.
- ◆ **Translation ScreenTip (p. 270-271)** The Enhanced ScreenTip translates words when you point to them. The Translation ScreenTip supports English, French, and Spanish by default.
- ◆ **Print Preview (p. 278-279)** You can use the Shrink One Page button to reduce the font and spacing size on a page to make it fit. You can also edit text in Print Preview by turning the Magnifier option off.
- ◆ **Blog (p. 298-302)** A blog is a Web site that provides journal style information on a particular subject, such as news or a diary. You can create and publish blog postings directly from Word.
- ◆ **Restrict formatting and editing (p. 310-311)** The Restrict Formatting and Editing task pane allows you to restrict users from editing parts of a document or from making any formatting changes or limit formatting to a selection of styles.
- ◆ **Add a digital signature line (p. 316-317)** You can add insert a signature line to provide a visible representation of a signature along with a digital signature.
- ◆ **Compare two version of a document (p. 341)** Display documents side by side, and then compare and combine information.
- ◆ **Content controls (p. 410-411)** Content controls are predefined fields or set of fields that contain information you can use throughout a document. Word includes many different types: text boxes (Rich Text and Text), picture, date picker, combo boxes, drop-down lists, and building block gallery. The controls are useful for creating forms.



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# Microsoft Certified Applications Specialist

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C

## About the MCAS Program

The Microsoft Certified Applications Specialist (MCAS) certification is the globally recognized standard for validating expertise with the Microsoft Office suite of business productivity programs. Earning an MCAS certificate acknowledges you have the expertise to work with Microsoft Office programs. To earn the MCAS certification, you must pass a certification exam for the Microsoft Office desktop applications of Microsoft Office Word, Microsoft Office Excel, Microsoft Office PowerPoint, Microsoft Office Outlook, or Microsoft Office Access. (The availability of Microsoft Certified Applications Specialist certification exams varies by program, program version, and language. Visit [www.microsoft.com](http://www.microsoft.com) and search on *Microsoft Certified Applications Specialist* for exam availability and more information about the program.) The Microsoft Certified Applications Specialist program is the only Microsoft-approved program in the world for certifying proficiency with Microsoft Office programs.

## What Does This Logo Mean?

It means this book has been approved by the Microsoft Certified Applications Specialist program to be certified courseware for learning Microsoft Office Word 2007 and preparing for the certification exam. This book will prepare you for the Microsoft Certified Applications Specialist exam for Microsoft Office Word 2007. Each certification level has a set of objectives, which are organized into broader skill sets. Throughout this book, content that pertains to a Microsoft Certified Applications Specialist objective is identified with the following MCAS certification logo and objective number below the title of the topic:



WD07S-1.1  
WD07S-2.2

C

## Word 2007 Objectives

Objective	Skill	Page
<b>WW07S-1</b>	<b>Creating and Customizing Documents</b>	
<b>WW07S-1.1</b>	<b>Create and format documents</b>	
WW07S-1.1.1	Work with templates	38, 84
WW07S-1.1.2	Apply Quick Styles to documents	87
WW07S-1.1.3	Format documents using themes	99, 105, 106
WW07S-1.1.4	Customize themes	100, 102, 104
WW07S-1.1.5	Format documents backgrounds	164-167
WW07S-1.1.6	Insert blank pages or cover pages	216
<b>WW07S-1.2</b>	<b>Lay out documents</b>	
WW07S-1.2.1	Format pages	40-41, 204-205, 272
WW07S-1.2.2	Create and modify headers and footers (Not using Quick Parts)	202, 204-205
WW07S-1.2.3	Create and format columns	168-169
<b>WW07S-1.3</b>	<b>Make documents and content easier to find</b>	
WW07S-1.3.1	Create, modify and update tables of contents	210-211
WW07S-1.3.2	Create, modify and update indexes	212-213
WW07S-1.3.3	Modify document properties	27
WW07S-1.3.4	Insert document navigation tools	230-231, 288-289
<b>WW07S-1.4</b>	<b>Personalize Word</b>	
WW07S-1.4.1	Customize Word options	6-7, 18-19, 58-59
WW07S-1.4.2	Change research options	222-223
<b>WW07S-2</b>	<b>Formatting Content</b>	
<b>WW07S-2.1</b>	<b>Format text and paragraphs</b>	
WW07S-2.1.1	Apply Styles	87, 96
WW07S-2.1.2	Create and modify styles	88, 90
WW07S-2.1.3	Format characters	62-66
WW07S-2.1.4	Format paragraphs	72, 73, 76-77
WW07S-2.1.5	Set and clear tabs	75
<b>WW07S-2.2</b>	<b>Manipulate text</b>	
WW07S-2.2.1	Cut, copy, and paste text	50-51
WW07S-2.2.2	Find and replace text	52-53

## Word 2007 Objectives *(continued)*

Objective	Skill	Page
<b>WW07S-2.3</b>	<b>Control pagination</b>	
WW07S-2.3.1	Insert and delete page breaks	276-277
WW07S-2.3.2	Create and modify sections	202-203, 276-277
<b>WW07S-3</b>	<b>Working with Visual Content</b>	
<b>WW07S-3.1</b>	<b>Insert illustrations</b>	
WW07S-3.1.1	SmartArt graphics	126-132
WW07S-3.1.2	Pictures from files and clip art	108, 109
WW07S-3.1.3	Shapes	174-175
<b>WW07S-3.2</b>	<b>Format illustrations</b>	
WW07S-3.2.1	Format text wrapping	170-171
WW07S-3.2.2	Format by sizing, cropping, scaling, and rotating	114-115, 120
WW07S-3.2.3	Apply Quick Styles	110
WW07S-3.2.4	Set contrast, brightness, and coloration	117, 118-119
WW07S-3.2.5	Add text to SmartArt graphics and shapes	126-127, 176
WW07S-3.2.6	Compress pictures	116
<b>WW07S-3.3</b>	<b>Format text graphically</b>	
WW07S-3.3.1	Insert and modify WordArt	121-126
WW07S-3.3.2	Insert Pull Quotes	172-173
WW07S-3.3.3	Insert and modify drop caps	162-163
<b>WW07S-3.4</b>	<b>Insert and modify text boxes</b>	
WW07S-3.4.1	Insert text boxes	172-173
WW07S-3.4.2	Format text boxes	172-173, 178, 179
WW07S-3.4.3	Link text boxes	172-173
<b>WW07S-4</b>	<b>Organizing Content</b>	
<b>WW07S-4.1</b>	<b>Structure content by using Quick Parts</b>	
WW07S-4.1.1	Insert building blocks in documents	218-219
WW07S-4.1.2	Save frequently used data as building blocks	218-219
WW07S-4.1.3	Insert formatted headers and footers from Quick Parts	202-203
WW07S-4.1.4	Insert fields from Quick Parts	184-185, 218-219
<b>WW07S-4.2</b>	<b>Use tables and lists to organize content</b>	
WW07S-4.2.1	Create tables and lists	136-137
WW07S-4.2.2	Sort content	139

## Word 2007 Objectives *(continued)*

Objective	Skill	Page
WW07S-4.2.3	Modify list formats	76-79
<b>WW07S-4.3</b>	<b>Modify tables</b>	
WW07S-4.3.1	Apply Quick Styles to tables	146-147
WW07S-4.3.2	Modify table properties and options	140-141
WW07S-4.3.3	Merge and split table cells	142-143
WW07S-4.3.4	Perform calculations in tables	150
WW07S-4.3.5	Change the position and direction of cell contents	144-145
<b>WW07S-4.4</b>	<b>Insert and format references and captions</b>	
WW07S-4.4.1	Create and modify sources	232
WW07S-4.4.2	Insert citations and captions	232
WW07S-4.4.3	Insert and modify bibliographies	206
WW07S-4.4.4	Select reference styles	206
WW07S-4.4.5	Create, modify and update tables of figures and tables of authorities	233
<b>WW07S-4.5</b>	<b>Merge documents and data sources</b>	
WW07S-4.5.1	Create merged documents	248-249, 254-255
WW07S-4.5.2	Merge data into form letters	248-249, 254-255
WW07S-4.5.3	Create envelopes and labels	258
<b>WW07S-5</b>	<b>Reviewing Documents</b>	
<b>WW07S-5.1</b>	<b>Navigate documents</b>	
WW07S-5.1.1	Move a document using the Find and Go To command	52-53, 230-231
WW07S-5.1.2	Change window views	16, 28, 44-45
<b>WW07S-5.2</b>	<b>Compare and merge document versions</b>	
WW07S-5.2.1	Compare document versions	341
WW07S-5.2.2	Merge document versions	341
WW07S-5.2.3	Combine revisions from multiple authors	341
<b>WW07S-5.3</b>	<b>Manage track changes</b>	
WW07S-5.3.1	Display markup	338-339
WW07S-5.3.2	Enable, disable, accept and reject tracked changes	338-339
WW07S-5.3.3	Change tracking options	338-339
<b>WW07S-5.4</b>	<b>Insert, modify, and delete comments</b>	338-339
<b>WW07S-6</b>	<b>Sharing and Securing Content</b>	

## Word 2007 Objectives *(continued)*

Objective	Skill	Page
<b>WW07S-6.1</b>	<b>Prepare documents for sharing</b>	
WW07S-6.1.1	Save to appropriate formats	22-24, 294-295, 365-366, 408
WW07S-6.1.2	Identify document features not supported by previous versions using the compatibility checker	26, 304-305
WW07S-6.1.3	Remove inappropriate or private information using Document Inspector	304-305
<b>WW07S-6.2</b>	<b>Control document access</b>	
WW07S-6.2.1	Restrict permissions to documents	312-313
WW07S-6.2.2	Mark documents as final	330
WW07S-6.2.3	Set passwords	308-309
WW07S-6.2.4	Protect documents	306-307
<b>WW07S-6.3</b>	<b>Attach digital signatures</b>	
WW07S-6.3.1	Authenticate documents using digital signatures	314-315
WW07S-6.3.2	Insert a line for a digital signature	316-317

## Preparing for a MCAS Exam

Every Microsoft Certified Applications Specialist certification exam is developed from a list of objectives based on how Microsoft Office programs are actually used in the workplace. The list of objectives determine the scope of each exam, so they provide you with the information you need to prepare for MCAS certification. Microsoft Certified Applications Specialist Approved Courseware, including the On Demand series, is reviewed and approved on the basis of its coverage of the objectives. To prepare for the certification exam, you should review and perform each task identified with a MCAS objective to confirm that you can meet the requirements for the exam.

## Taking a MCAS Exam

The Microsoft Certified Applications Specialist certification exams are not written exams. Instead, the exams are performance-based examinations that allow you to interact with a “live” Office program as you complete a series of objective-based tasks. All the standard ribbons, tabs, toolbars, and keyboard shortcuts are available during the exam. Microsoft Certified Applications Specialist exams for Office 2007 programs consist of 25 to 35 questions, each of which requires you to complete one or more tasks using the Office program for which you are seeking certification. A typical exam takes from 45 to 60 minutes. Passing percentages range from 70 to 80 percent correct.

### The Exam Experience

After you fill out a series of information screens, the testing software starts the exam and the Office program. The test questions appear in the exam dialog box in the lower right corner of the screen.

- ◆ The timer starts when the first question appears and displays the remaining exam time at the top of the exam dialog box. If the timer and the counter are distracting, you can click the timer to remove the display.
- ◆ The counter at the top of the exam dialog box tracks how many questions you have completed and how many remain.
- ◆ If you think you have made a mistake, you can click the Reset button to restart the question. The Reset button does not restart the entire exam or extend the exam time limit.
- ◆ When you complete a question, click the Next button to move to the next question. It is not possible to move back to a previous question on the exam.
- ◆ If the exam dialog box gets in your way, you can click the Minimize button in the upper right corner of the exam dialog box to hide it, or you can drag the title bar to another part of the screen to move it.

## Tips for Taking an Exam

- ◆ Carefully read and follow all instructions provided in each question.
- ◆ Make sure all steps in a task are completed before proceeding to the next exam question.
- ◆ Enter requested information as it appears in the instructions without formatting unless you are explicitly requested otherwise.
- ◆ Close all dialog boxes before proceeding to the next exam question unless you are specifically instructed otherwise.
- ◆ Do not leave tables, boxes, or cells “active” unless instructed otherwise.
- ◆ Do not cut and paste information from the exam interface into the program.
- ◆ When you print a document from an Office program during the exam, nothing actually gets printed.
- ◆ Errant keystrokes or mouse clicks do not count against your score as long as you achieve the correct end result. You are scored based on the end result, not the method you use to achieve it. However, if a specific method is explicitly requested, you need to use it to get credit for the results.
- ◆ The overall exam is timed, so taking too long on individual questions may leave you without enough time to complete the entire exam.
- ◆ If you experience computer problems during the exam, immediately notify a testing center administrator to restart your exam where you were interrupted.

## Exam Results

At the end of the exam, a score report appears indicating whether you passed or failed the exam. An official certificate is mailed to successful candidates in approximately two to three weeks.

## Getting More Information

To learn more about the Microsoft Certified Applications Specialist program, read a list of frequently asked questions, and locate the nearest testing center, visit:

*[www.microsoft.com](http://www.microsoft.com)*

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