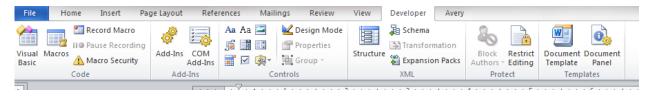# WORD ADVANCED CLASS- WINDOWS HANDOUT

GETTING STARTED:

1. Click File—Options—Customize Ribbon
2. Check the box next to Developer on the right. This will display the Developer tab
3. Click OK

AUTO TEXT AND QUICK PARTS

CREATING A QUICK PART

1. Type the text that you wish to store for frequent use
2. Highlight the text (and images)
3. Click the Insert Tab and then click Quick Parts
4. Select Save selection to Quick Parts Gallery
5. In the Gallery type, select the appropriate option
6. Click OK

TO INSERT A QUICK PART

1. Click Insert—Quick Part
2. Locate the desired text under the various groups
   OR
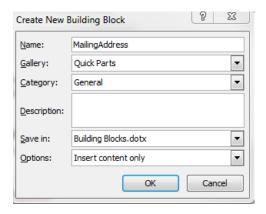1. Begin typing the name of the building block and press F3
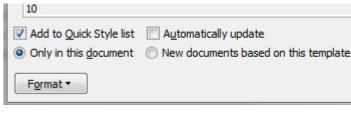
TO DELETE QUICK PART ENTRIES

1. Click Insert—Quick Part--- Building Block Gallery
2. Locate the item and click Delete

STYLES

MODIFYING AN EXISTING STYLE

1. Right click on the Style type in the Styles group on the Home Tab
2. Select Modify
3. Make the desired changes
4. To apply the changes for the style only in the current document, select Only in this document.

5. To apply the changes for the style for new documents, select New documents based on this template
6. To automatically update all instances of the style within the existing document, check Automatically update
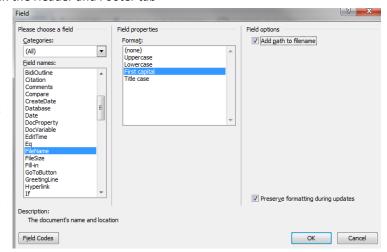7. Click OK

CREATING A NEW STYLE

1. Type some text and apply all the desired formatting (including font, size, color, text effects)
2. Highlight the text and right click
3. Select Styles--- Save Selection as New Quick Style
4. Enter a name for the style and click OK

HEADERS AND FOOTERS

CREATING

1. Right click on the Top or Bottom of the document to launch the Header and Footer tab
2. Select Edit Header or Edit Footer
3. Make the desired changes
    a. Click the Header icon to insert prebuilt headers
    b. Use Quick Parts to insert auto text or fields such as document name, author, created date
    c. To enter the file name and location path, select Quick Parts—Field
        i. In the first column select File Name
        ii. In the second, select the desired formatting
        iii. In the third column, check Add path to filename
    d. Omit the header on the first page by selecting Different First Page
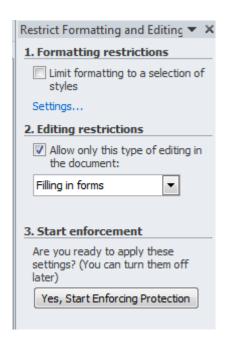   e. Click Close Header and Footer

FORM CONTROLS

http://blogs.office.com/b/microsoft-word/archive/2006/11/17/meet-the-controls.aspx

INSERTING

1. Click the Developer Tab
2. Click the desired type of control
3. Position the element and size it as needed
4. Click Properties
5. Enter a title for the control
6. Select if the field can be edited and/or deleted
7. Click OK

RESTRICT EDITING

1. Click the Developer Tab
2. Select Restrict Editing
3. Check the box to "allow only this type of editing in the document"
4. In the drop down, select Filling in forms
5. Click Yes, Start Enforcing Protection
6. Enter a password to protect the form (Do not forget the password!)

GRAPHIC TOOLS

- SMART ART: a variety of graphic templates to illustrate processes, lists, etc
- PICTURE TOOLS: Apply quick formatting to pictures, remove backgrounds, add texture, change color and apply other stylistic effects
- SCREENSHOT TOOL: Quickly capture full windows or portions of a window and insert it in your document

TEMPLATES

PREBUILT TEMPLATES

1. Click File-New
2. Browse for the desired template
3. Click download (if the template is online)
4. Click Create

CREATE YOUR OWN

1. Create the document that you wish to use as a template.
2. Click File—Save As
3. Give the document a name and select Word Template as the file type
4. Save the template in the following location:
   a. C:\Users\SMUID\AppData\Roaming\Microsoft\Templates
5. To use the template, click file-New- My Templates and select it from the list
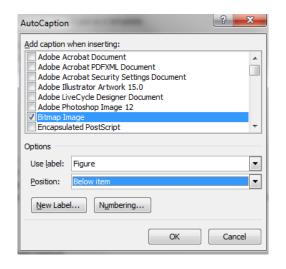
REFERENCE ITEMS

TABLE OF CONTENTS

1. Use styles throughout your document to designate Headings
2. Position the cursor in the location that you wish to insert the TOC
3. Click References—Table of Contents--- and select the desired format
4. As subsequent changes are made in the document, you'll need to update the TOC. Select the TOC and click Update Table

INSERT CAPTIONS

1. Click on the Image
2. Select References---Insert Captions
3. Enter the desired text
4. Click OK

AUTOMATICALLY INSERT CAPTIONS FOR ALL IMAGES

1. Click References—insert Captions
2. Click the AutoCaption button
3. Select the format types that should be included
4. Click the Label and Position
5. Click OK

PROTECTING YOUR DOCUMENT

ENCRYPTING WITH A PASSWORD

Note: If you forget the password it is not recoverable!

1. Click File—Protect Document—Encrypt document with a password
2. Enter the password
3. Click OK

RESTRICT EDITING

1. Click the Developer Tab
2. Select Restrict Editing
3. Select the editing options
   a. Limit formatting to a selection of styles will lock down the style types that can be used
   b. Allow only this type of editing: allows you to specify what content the user can change
   c. Exceptions: add individual exceptions (use smu\smuid to locate the individuals)
4. Click Yes, Start Enforcing Protection
5. Select Password for minimal security.
6. Click OK.

TRACK CHANGES AND DOCUMENT COLLABORATION

HTTP://WWW.ADDICTIVETIPS.COM/MICROSOFT-OFFICE/WORD-2010-TRACK-CHANGES-IN-DOCUMENT/

ENABLE TRACK CHANGES

1. Click Review
2. Click Track Changes
3. Click Track Changes

REVIEWING CHANGES

1. Each change will be highlighted and marked. Simply click Accept – Accept and move to next
2. To accept or reject all changes at once, Click Accept—Accept all changes in document
3. Use the drop down menu to show different version of the document (original with and without markup, and final with and without markup)

COMMENTS

1. Click Review—New Comment
2. Type your comment in the comment box. It will automatically use the Initials configured in Word to mark your comments.
3. To Reply to an existing comment, click in the existing comment and then click New Comment

COMBINE AND COMPARE

1. Click the Review tab
2. Select Compare
3. Select either Compare (to view documents side by side) or Combine to merge several documents into one

MAIL MERGE

THE BASICS

1. Prepare your data source (ensure that Excel columns all have headings)
2. Draft your document
3. Click Select Recipients
4. Select Use Existing Source
5. Select your data source
6. Click Edit Recipient List to filter, exclude records, etc
7. Insert merge fields into the document—use prebuilt items or merge specific fields
8. Click Finish and Merge

RULES

ASK

1. Click Rules-Ask
2. Enter a name for the bookmark
3. Enter the prompt
4. Enter the default text
5. Click OK
6. In your document, place the cursor where the text should be inserted
7. Click Insert—Quick Parts—Fields
8. Select REF from the list
9. Select the Bookmark
10. Click Insert
11. When you merge the document, it will prompt you to enter the correct value. It will then insert that into all locations in the document
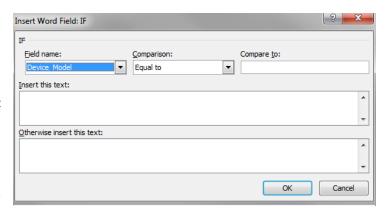
IF THEN ELSE

1. Click Rules—If Then Else
2. Select the Field Name that you wish to evaluate
3. Select the comparison formula and criteria
4. Configure the appropriate text for the different outcomes
5. Click OK

SKIP RECORD IF

Instead of unchecking various records to exclude, you can use the skip logic

1. Click Rules—Skip Record If
2. Select the Field for your criteria
3. Select the Comparison operator and the Compare To text
4. Click OK

MACROS

1. Practice the sequence of steps you want to record
2. Click Developer-Record Macro
3. Enter a name and select Keyboard and then choose to store the Macro for all document or just the current doc
4. Click OK
5. Assign the keyboard combination that will activate the Macro
6. Click Assign when you locate a keyboard combination that is not in use
7. The icon will turn into a tape recorder. Perform the sequence of steps
8. Click Stop Recording when complete
9. To activate the Macro, press the key combination you assigned
10. To save the macro, you will need to save the document in the .docm format