Book II

Word

Contents at a Glance

Chapter 1: Speed Techniques for Using Word

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*T*his chapter explains shortcuts and commands that can help you become a speedy user of Word 2010. Everything in this chapter was put here so that you can get off work earlier and take the slow, scenic route home. Starting here, you discover how to create and change your view of documents. You find out how to select text, get from place to place, and mark your place in long documents. You also explore how to insert one document into another and create data-entry forms to make entering information a little easier.

Introducing the Word Screen

Seeing the Word screen for the first time is like trying to find your way through Tokyo's busy Ikebukuro subway station. It's intimidating. But when you start using Word, you quickly find out what everything is. To help you get going, Figure 1-1 shows you the different parts of the screen. Here are shorthand descriptions of these screen parts:

✦ **Word button:** In the upper-left corner of the screen, the Word button offers a menu for restoring, moving, sizing, minimizing, maximizing, and closing the Word window.

✦ **Quick Access toolbar:** This toolbar offers the Save, Undo, and Repeat buttons. Wherever you go in Word, you see the Quick Access toolbar. Book I, Chapter 1 explains the toolbar in detail; Book VIII, Chapter 1 explains how to customize and move the Quick Access toolbar.

✦ **Title bar:** At the top of the screen, the title bar tells you the name of the document you're working on.

✦ **Minimize, Restore, Close buttons:** These three magic buttons make it very easy to shrink, enlarge, and close the window you are working in.

File

✦ **File tab:** Go to the File tab to do file-management tasks.

✦ **The Ribbon:** Select a tab on the Ribbon to undertake a new task. (Book I, Chapter 1 explains the Ribbon in detail, and Book VIII, Chapter 1 explains how to customize the Ribbon.)

✦ **Scroll bars:** The scroll bars help you get from place to place in a document.

✦ **Status bar:** The status bar gives you basic information about where you are and what you're doing in a document. It tells you what page and what section you're in, the total number of pages and words in your document, and what language the text is written in. Book VIII, Chapter 1 explains how to customize the status bar.

✦ **View buttons:** Click one of these buttons — Print Layout, Full Screen Reading, Web Layout, Outline, or Draft — to change your view of a document.

✦ **Zoom controls:** Use these controls to zoom in and out on your work.

File tab

Word button

The Ribbon

Quick Access toolbar   Title bar   Minimize, Restore, and Close buttons
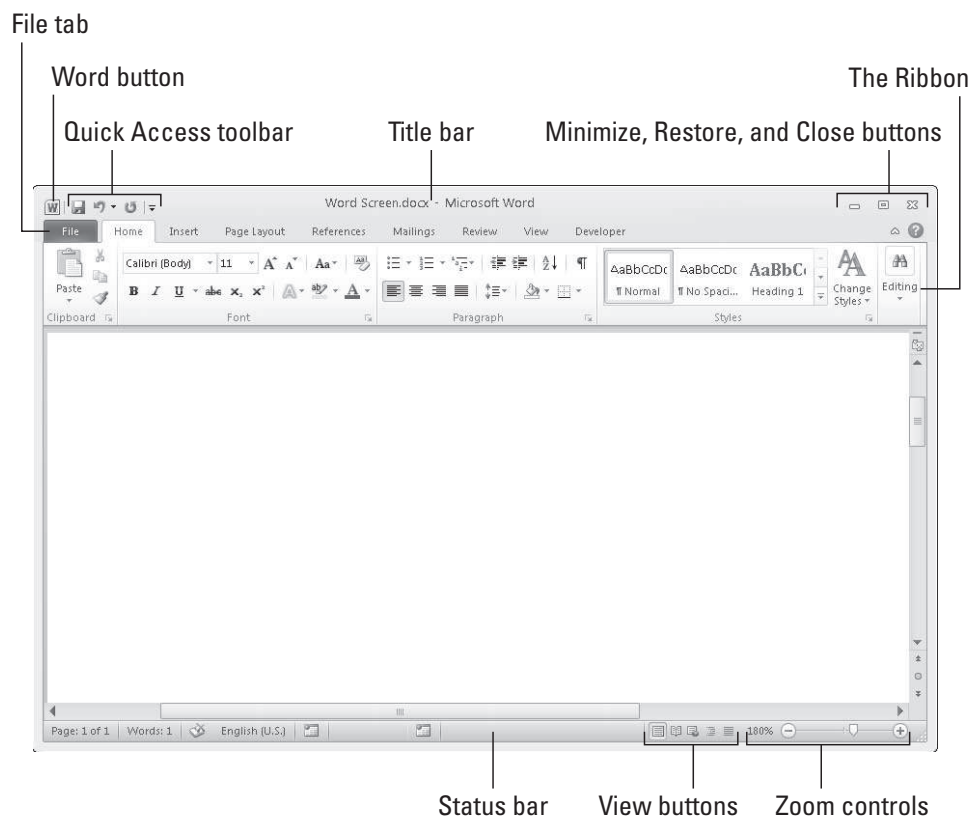
Figure 1-1:
The Word
screen.

Status bar   View buttons   Zoom controls

Creating a New Document

Document is just a fancy word for a letter, report, announcement, or proclamation that you create with Word. When you first start Word, you see a new, blank document with the generic name *Document1*. You can start working right away on this document, or you can create a new document by choosing a template.

A *template* is a special kind of file that is used as the starting point for creating documents. Each template comes with many preformatted styles. If your aim is to create an academic report, flyer, newsletter, calendar, résumé, or other sophisticated document, see if you can spare yourself the formatting work by choosing the appropriate template when you create your document. (Chapter 3 of this mini-book explains templates in detail and how to create your own templates.)

File

No matter what kind of document you want, start creating it by going to the File tab and choosing New. The Available Templates window shown in Figure 1-2 appears. This window offers templates for creating many types of documents. Click a template in this window to see, on the right side of the window, a preview of the document you will create. Double-click a template (or select it and click the Create button) to create a document.

Click to backtrack   Choose a template   Preview the template you will create

Figure 1-2: Create documents from templates in the Available Templates window.

Click Create (or double-click a template) to create a document
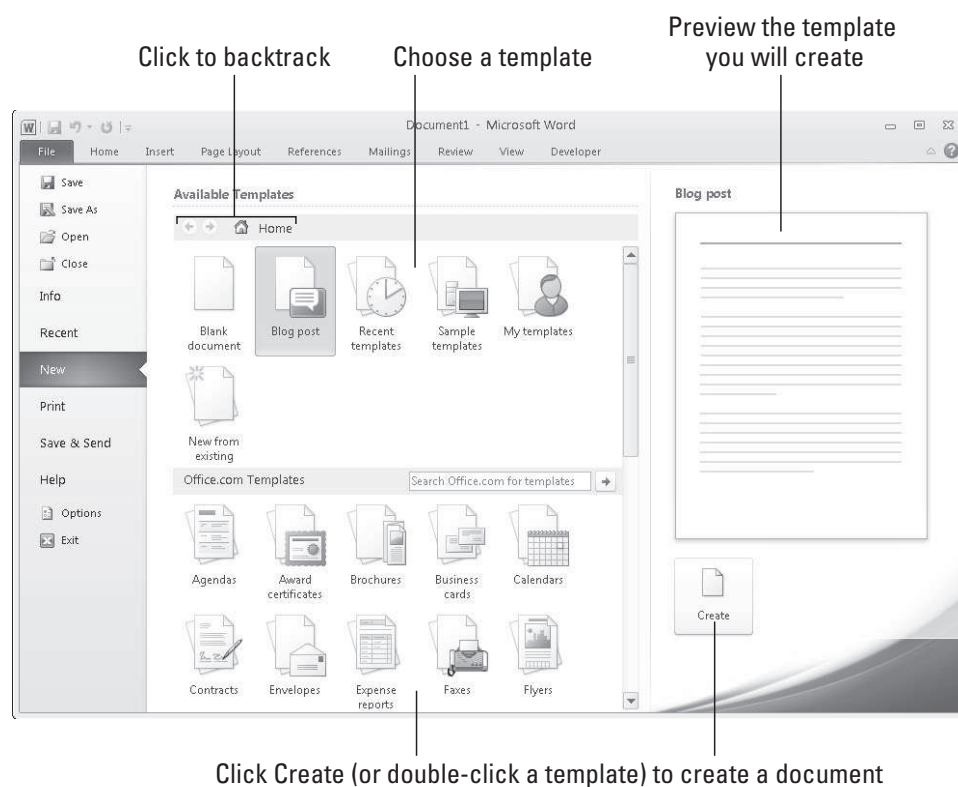
Constructing your blank default document

When you open a new, blank document by pressing Ctrl+N or choosing the Blank Document icon in the Available Templates window (refer to Figure 1-2), does the document meet your specifications? When you start typing, does the text appear in your favorite font? Are the margins just-so?

You can get a head start on creating documents by telling Word what you want new, blank documents to look like. To do that, open the Font dialog box (click the Font group button on the Home tab) followed by the Page Setup dialog box (click the Page Setup group button on the Page Layout tab), make your formatting choices in each dialog box, and click the Set As Default button. Changes you make this way are saved to the Blank Document template, the one used to create blank documents. (Chapter 3 of this mini-book explains what templates are).

Use these techniques in the Available Templates window to create a document:

✦ **Create a blank document.** Choose the Blank Document icon to create a bare-bones document with few styles. Blank Document is the default template for creating documents. (By pressing Ctrl+N, you can create a new, blank document without opening the Available Templates window.)

✦ **Create a brochure, form, invoice, or other specialty document.** Take your pick of these techniques to create a specialty document:

  • *Use a template on your computer.* Choose Sample Templates. Templates that you loaded on your computer when you installed Office appear in the window.

  • *Download a template from Microsoft.* Under Office.com Templates, do one of the following: (1) choose the type of template you want, or (2) make sure that your computer is connected to the Internet, enter a search term in the Search box, and click the Start Searching button (or press Enter). Choose a template and click the Download button to download it to your computer.

  • *Use a template you created (or downloaded earlier from Microsoft or acquired from a third party).* Click the My Templates icon. The New dialog box appears so that you can choose a template.

✦ **Create a document from a template you recently used.** Click the Recent Templates icon and choose a template.

✦ **Create a document from another document.** If you can use another document as the starting point for creating a new document, click the New from Existing icon. In the New from Existing Document dialog box, select the document and click the Create New button.

TIP

If your search for the perfect template takes you too far afield, you can click the Home, Back, or Forward button in the Available Templates window to backtrack.

Book I, Chapter 1 explains how to save documents after you create them, as well as how to open the document you want to work on.

Getting a Better Look at Your Documents

A computer screen can be kind of confining. There you are, staring at the darn thing for hours at a stretch. Do you wish the view were better? The Word screen can't be made to look like the Riviera, but you can examine documents in different ways and work in two places at one time in the same document. Better read on.

Viewing documents in different ways

In word processing, you want to focus sometimes on the writing, sometimes on the layout, and sometimes on the organization of your work. To help you stay in focus, Word offers different ways of viewing a document. Figure 1-3 shows these views. These pages explain how to change views, the five different views, and why to select one over the other. (Be sure to visit Book I, Chapter 3 as well; it describes how to view a document through more than one window and how to open a second window on a document.)

Changing views

Use these techniques to change views:

✦ Click one of the five View buttons on the right side of the status bar.

✦ On the View tab, click one of the five buttons in the Document Views group.

Print Layout view

Switch to Print Layout view to see the big picture. In this view, you can see what your document will look like when you print it. You can see graphics, headers, footers, and even page borders in Print Layout view. You can also see clearly where page breaks occur (where one page ends and the next begins). In Print Layout view, you can click the One Page, Two Pages, or Page Width button on the View tab to display more or fewer pages on your screen.

Full Screen Reading view

Switch to Full Screen Reading view to focus on the text itself and proofread your documents. In this view, everything gets stripped away — the Ribbon, scroll bars, status bar, and all. All you see is the text and artwork in your documents. You can't enter or edit text (unless you open the View Options menu and choose Allow Typing).

Figure 1-3:
The different
document
views (top
to bottom):
Print Layout,
Full Screen
Reading,
Web Layout,
Outline, and
Draft.

Click the View Options button to open a menu with options for improving your view. For example, you can increase or decrease the size of text, show one or two document pages at a time, and display page margins. To get from page to page, click buttons along the top of the window. Click the Close button to leave this view.

Web Layout view

Switch to Web Layout view to see what your document would look like as a Web page. Background colors appear (if you chose a theme or background color for your document). Text is wrapped to the window rather than around the artwork in the document. Book VIII, Chapter 2 explains how to save an Office file, a Word document included, as a Web page.

Outline view

Switch to Outline view to see how your work is organized. In this view, you can see only the headings in a document. You can get a sense of how your document unfolds and easily move sections of text backward and forward in a document. In other words, you can reorganize a document in Outline view. Chapter 6 of this mini-book explains outlines in torturous detail.

Draft view

Switch to Draft view when you're writing a document and you want to focus on the words. Clip-art images, shapes, and other objects don't appear in this view, nor do page breaks (although you can clearly see section breaks). Draft view is best for writing first drafts.

Splitting the screen

Besides opening a second window on a document (a subject of Book I, Chapter 3), you can be two places at one time in a Word document by splitting the screen. One reason you might do this: You are writing a long report and want the introduction to support the conclusion, and you also want the conclusion to fulfill all promises made by the introduction. That's difficult to do sometimes, but you can make it easier by splitting the screen so that you can be two places at one time as you write your introduction and conclusion.

Splitting a window means to divide it into north and south halves, as shown in Figure 1-4. In a split screen, two sets of scroll bars appear so that you can travel in one half of the screen without disturbing the other half. Word offers two ways to split the screen:

✦ Move the mouse pointer to the *split box* at the top of the scroll bar on the right. Move it just above the View Ruler button. When the pointer turns into double arrows, click and drag the gray line down the screen. When you release the mouse button, you have a split screen.

✦ On the View tab, click the Split button. A gray line appears on-screen. Roll the mouse down until the gray line is where you want the split to be, and click. You get two screens split down the middle.
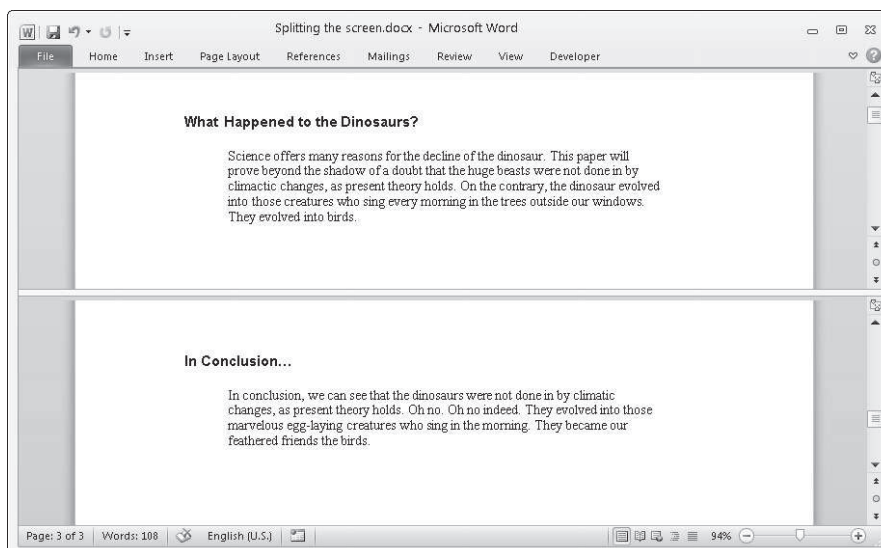
Figure 1-4:
A split screen.

When you tire of this schizophrenic arrangement, click the Remove Split button on the View tab or drag the line to the top or bottom of the screen. You can also double-click the line that splits the screen in two.

In a split screen, you can choose a different view for the different halves. For example, click in the top half of the screen and choose Outline view to see your document in outline form, and click in the bottom half and choose Draft view to see the other half in Draft view. This way, you can see the headings in a document while you write the introduction.

Selecting Text in Speedy Ways

Book I, Chapter 2 explains how to enter text and change its appearance and size. After you enter text, you inevitably have to copy, move, or delete it, but you can't do those tasks until you select it first. Table 1-1 describes short-cuts for selecting text.

If a bunch of highlighted text is on-screen and you want it to go away but it won't (because you pressed F8), press the Esc key.

TIP

After you press F8, all the keyboard shortcuts for moving the cursor also work for selecting text. For example, press F8 and then press Ctrl+Home to select everything from the cursor to the top of the document. Later in this chapter, "Keys for getting around quickly" describes keyboard shortcuts for getting from place to place.

Table 1-1	Shortcuts for Selecting Text
To Select This	*Do This*
A word	Double-click the word.
A line	Click in the left margin next to the line.
Some lines	Drag the mouse pointer over the lines or drag it down the left margin.
A sentence	Ctrl+click the sentence.
A paragraph	Double-click in the left margin next to the paragraph.
A mess of text	Click at the start of the text, hold down the Shift key, and click at the end of the text.
A gob of text	Put the cursor where you want to start selecting, press F8, and press an arrow key, drag the mouse, or click at the end of the selection.
Text with the same formats	On the Home tab, click the Select button and choose Select Text with Similar Formatting (you may have to click the Editing button first).
A document	Hold down the Ctrl key and click in the left margin; triple-click in the left margin; press Ctrl+A; or go to the Home tab, click the Select button, and choose Select All (you may have to click the Editing button first).

Viewing the hidden format symbols

Sometimes it pays to see the hidden format symbols when you're editing and laying out a document. The symbols show lines breaks, tab spaces, paragraph breaks, and the space or spaces between words. To see the hidden format symbols, go to the Home tab and click the Show/Hide ¶ button. Click the button again to hide the symbols.

Here's what the hidden symbols look like on-screen.

Symbol	How to Enter
Line break (↵)	Press Shift+Enter
Optional hyphen -(¬)	Press Ctrl+hyphen
Paragraph (¶)	Press Enter
Space (·)	Press the spacebar
Tab (→)	Press tab

Moving Around Quickly in Documents

Besides sliding the scroll bar, Word offers a handful of very speedy techniques for jumping around in documents: pressing shortcut keys, browsing in the Select Browse Object menu, using the Go To command, and navigating with the Document Map or thumbnails. Read on to discover how to get there faster, faster, faster.

Keys for getting around quickly

One of the fastest ways to go from place to place is to press the keys and key combinations listed in Table 1-2.

Table 1-2	Keys for Moving Around Documents
Key to Press	*Where It Takes You*
PgUp	Up the length of one screen
PgDn	Down the length of one screen
Ctrl+PgUp	To the previous page in the document
Ctrl+PgDn	To the next page in the document
Ctrl+Home	To the top of the document
Ctrl+End	To the bottom of the document

If pressing Ctrl+PgUp or Ctrl+PgDn doesn't get you to the top or bottom of a page, you clicked the Select Browse Object button at the bottom of the vertical scroll bar, which makes Word go to the next bookmark, comment, heading, or whatever. Click the Select Browse Object button and choose Browse By Page to make these key combinations work again.

TIP Here's a useful keystroke for getting from place to place: Shift+F5. Press it once to go to the location of your most recent edit. Press it two or three times to go back one or two edits before that. Pressing Shift+F5 is useful when you want to return to the place where you made an edit but can't quite remember where that place is.

Navigating from page to page or heading to heading

In lengthy documents such as the one in Figure 1-5, the best way to get from place to place is to make use of the Navigation pane. Click a heading or a page in the Navigation pane and Word takes you there in the twinkling of an eye.

Click a heading   Click a page thumbnail

Figure 1-5:
In the
Navigation
pane, click
a heading
or page
thumbnail
to go from
place to
place.
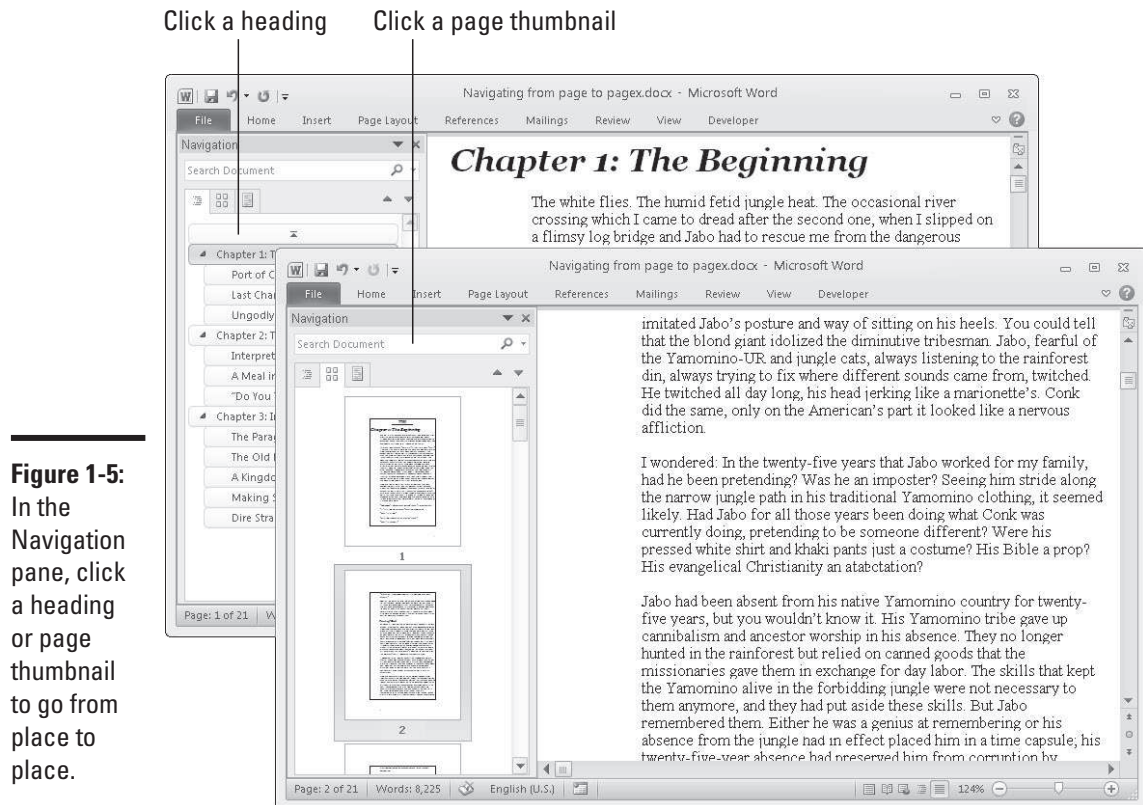
To display the Navigation pane, go to the View tab and click the Navigation Pane check box (you may have to click the Show button first). Then select a tab in the Navigation pane and go to it:

✦ **Going from heading to heading:** Select the Browse the Headings tab. Headings in your document appear (provided you assigned heading styles to headings). You can use the Navigation pane like a table of contents and click headings to get from place to place. Right-click a heading and choose a heading-level option on the shortcut menu to tell Word which headings to display. You can also right-click a heading and choose Expand All or Collapse All to see or hide lower-level headings.

✦ **Going from page to page:** Select the Browse the Pages tab. A thumbnail image of each page in the document appears. To quickly move from page to page, use the scroll bar in the Navigation pane or click a page thumbnail. Each thumbnail is numbered so that you always know which page you are viewing.

"Browsing" around a document

A really fast way to move around quickly is to click the Select Browse Object button in the lower-right corner of the screen. When you click this button (or press Ctrl+Alt+Home), Word presents 12 *Browse By* icons: Field, Endnote,

Footnote, Comment, Section, Page, Go To, Find, Edits, Heading, Graphic, and Table. Select the icon that represents the element you want to go to, and Word takes you there immediately. For example, click the Browse by Heading icon to get to the next heading in your document (provided that you assigned heading styles to headings).

REMEMBER

After you have selected a Browse By icon, the navigator buttons — the double arrows directly above and below the Select Browse Object button — turn blue. Click a blue navigator button to get to the next example or the previous example of the element you chose. For example, if you selected the Browse by Heading icon, all you have to do is click the blue navigator buttons to get from heading to heading, backward or forward in your document.

Going there fast with the Go To command

Find

Another fast way to go from place to place in a document is to use the Go To command. On the Home tab, open the drop-down list on the Find button and choose Go To (you may have to click the Editing button first). You see the Go To tab of the Find and Replace dialog box, as shown in Figure 1-6. You can also open this dialog box by pressing Ctrl+G or F5.

Figure 1-6: Using the Go To command.
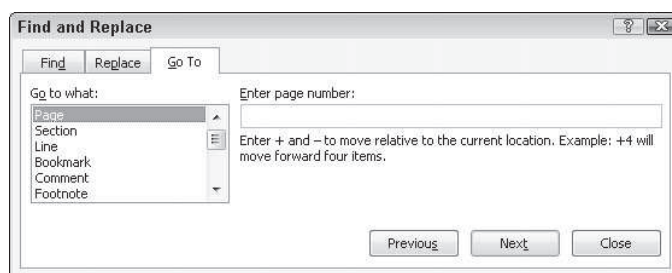
The Go to What menu in this dialog box lists everything that can conceivably be numbered in a Word document, and other things, too. Everything that you can get to with the Select Browse Object button, as well as lines, equations, and objects, can be reached by way of the Go To tab. Click a menu item, enter a number, choose an item from the drop-down list, or click the Previous, Next, or Go To buttons to go elsewhere.

Bookmarks for hopping around

Rather than press PgUp or PgDn or click the scroll bar to thrash around in a long document, you can use *bookmarks*. All you do is put a bookmark in an important spot in your document that you'll return to many times. To return to that spot, open the Bookmark dialog box and select a bookmark name, as shown in Figure 1-7. True to the craft, the mystery writer whose bookmarks are shown in Figure 1-7 wrote the end of the story first and used bookmarks to jump back and forth between the beginning and end to make all the clues fit together.

Figure 1-7:
The
Bookmark
dialog box.
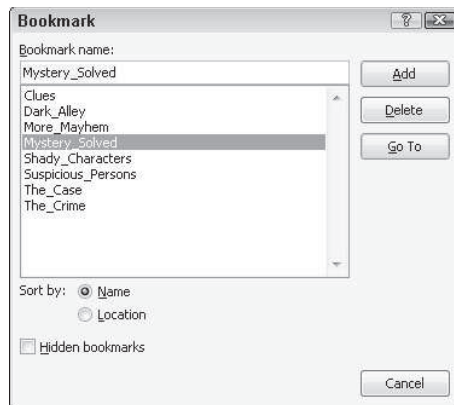
Follow these instructions to handle bookmarks:

✦ **Adding a bookmark:** Click where you want the bookmark to go, visit the Insert tab, and click the Bookmark button (you may have to click the Links button first, depending on the size of your screen). Then, in the Bookmark dialog box, type a descriptive name in the Bookmark Name box, and click the Add button. Bookmarks can't start with numbers or include blank spaces. You can also open the Bookmark dialog box by pressing Ctrl+Shift+F5.

✦ **Going to a bookmark:** On the Insert tab, click the Bookmark button (you may have to click the Links button first), double-click the bookmark in the Bookmark dialog box, and click the Close button.

✦ **Deleting a bookmark:** Select the bookmark in the Bookmark dialog box and click the Delete button.

Word uses bookmarks for many purposes. For example, bookmarks indicate where cross-references are located in a document.

Inserting a Whole File into a Document

One of the beautiful things about word processing is that you can recycle documents. Say that you wrote an essay on the Scissor-Tailed Flycatcher that would fit very nicely in a broader report on North American birds. You can insert the Scissor-Tailed Flycatcher document into your report document:

1. **Place the cursor where you want to insert the document.**

2. **On the Insert tab, open the drop-down list on the Object button and choose Text from File.**
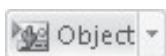
   You see the Insert File dialog box.

3. **Find and select the file you want to insert.**

4. **Click the Insert button.**

Entering Information Quickly in a Computerized Form

A *form* is a means of soliciting and recording information. You can use forms like the one shown in Figure 1-8 to enter data faster and to reduce data-entry errors. Instead of entering all the information by hand, you or a data-entry clerk can choose entries from combo boxes, drop-down lists, and date pickers. You save time because you don't have to enter all the information by hand, and the information you enter is more likely to be accurate because you choose it from prescribed lists instead of entering it yourself.
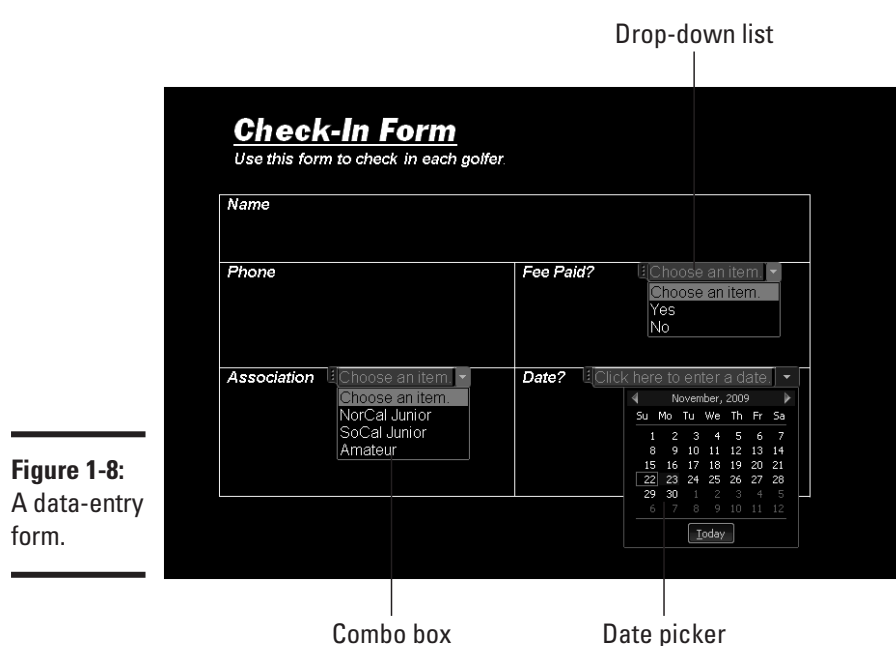
Drop-down list

Figure 1-8:
A data-entry
form.

Combo box   Date picker

To create a form like the one shown in Figure 1-8, start by creating a template for your form and putting *data-entry controls* — the combo boxes, drop-down lists, and date pickers — in the form. To fill out a form, you create a document from the form template and go to it. These pages explain how to create a form and use forms to record information.

Creating a computerized form

The first step in creating a data-entry form is to create a template for holding the form. After that, you design the form itself by labeling the data fields and creating the data-entry controls. Better keep reading.

Creating a template to hold the form

Follow these steps to create a new template:

File

1. **On the File tab, choose New.**

   You see the Available Templates window.

2. **Click the My Templates icon.**

   The New dialog box appears. It lists Word templates that are on your computer.

3. **Click the Template option button.**

   You can find this button under Create New in the lower-right corner of the dialog box.

4. **Click OK.**

5. **Click the Save button (or press Ctrl+S) to open the Save As dialog box.**

6. **Enter a descriptive name for your template and click the Save button.**

   Chapter 3 of this mini-book explains templates in detail.

Creating the form and data-entry controls

Your next task is to create the form and data-entry controls for your template. Enter labels on the form where you will enter information. The form in Figure 1-8, for example, has five labels: Name, Phone, Fee Paid?, Association, and Date. After you enter the labels, follow these steps to create the data-entry controls:

1. **Display the Developer tab, if necessary.**

   If this tab isn't showing, go to the File tab, choose Options, and on the Customize Ribbon tab of the Word Options dialog box, select the Developer check box and click OK. (Book VIII, Chapter 1 explains in detail how to customize the Ribbon.)

2. **Click where you want to place a control, and then create the control by clicking a Controls button followed by the Properties button on the Developer tab.**

   Here are instructions for creating three types of controls:

   • *Drop-down list:* A *drop-down list* is a menu that "drops" when you open it to reveal different option choices (refer to Figure 1-8). Click the Drop-Down List Content Control button and then the Properties button. You see the Content Control Properties dialog box, as shown in Figure 1-9. For each option you want to place on the drop-down list, click the Add button, and in the Add Choice dialog box, enter the option's name in the Display Name text box and click OK, as shown in Figure 1-9.

- *Combo box:* Like a drop-down list, a *combo box* "drops" to reveal choices. However, as well as choosing an option on the drop-down list, data-entry clerks can enter information in the box (refer to Figure 1-8). Click the Combo Box Content Control button and then the Properties button. In the Content Control Properties dialog box, enter option names the same way you enter them in a drop-down list, as shown in Figure 1-9.

- *Date picker:* A *date picker* is a mini-calendar from which data-entry clerks can enter a date (refer to Figure 1-8). Click the Date Picker Content Control button and then the Properties button. In the Content Control Properties dialog box, choose a display format for dates and click OK.

3. **Click the Save button to save your template.**

   Now you're ready to use your newly made form to enter data.

Figure 1-9:
Click the Add button to create options for a drop-down list or combo box.
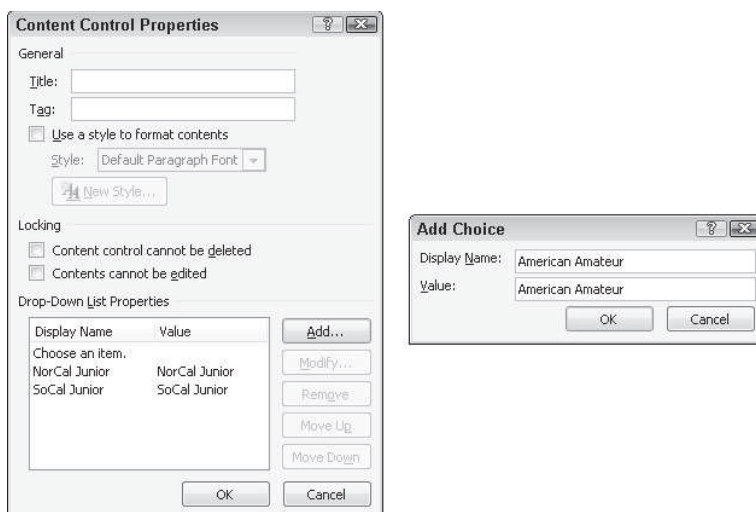
Entering data in the form

Now that you have the template, you or someone else can enter data cleanly in easy-to-read forms:

1. **On the File tab, choose New.**

   You see the Available Templates window.

2. **Click the My Templates icon.**

   The New dialog box opens and shows you Word templates on your computer.

3. **Double-click the name of the template you created for entering data in your form.**

   The form appears.

4. **Enter information in the input fields.**

   Press the up or down arrow, or press Tab and Shift+Tab to move from field to field. You can also click input fields to move the cursor there.

5. **When you're done, print the document or save it.**

Chapter 2: Laying Out Text and Pages

In This Chapter

↗ **Entering a section break**

↗ **Starting a new line and page**

↗ **Changing the margins**

↗ **Indenting text**

↗ **Numbering pages and handling headers and footers**

↗ **Adjusting the space between lines and paragraphs**

↗ **Handling numbered and bulleted lists**

↗ **Hyphenating the text**

This chapter explains how to format text and pages. A well-laid-out document says a lot about how much time and thought was put into it. This chapter presents tips, tricks, and techniques for making pages look just right.

In this chapter, you find out what section breaks are and why they are so important to formatting. You discover how to establish the size of margins, indent text, number pages, construct headers and footers, determine how much space appears between lines of text, handle lists, and hyphenate text.

Paragraphs and Formatting

Back in English class, your teacher taught you that a paragraph is a part of a longer composition that presents one idea or, in the case of dialogue, presents the words of one speaker. Your teacher was right, too, but for word-processing purposes, a paragraph is a lot less than that. In word processing, a paragraph is simply what you put on-screen before you press the Enter key.

For instance, a heading is a paragraph. If you press Enter on a blank line to go to the next line, the blank line is considered a paragraph. If you type **Dear John** at the top of a letter and press Enter, "Dear John" is a paragraph.

REMEMBER

It's important to know this because paragraphs have a lot to do with formatting. If you click the Paragraph group button on the Home tab and monkey around with the paragraph formatting in the Paragraph dialog box, your changes affect everything in the paragraph where the cursor is located. To make format changes to a whole paragraph, all you have to do is place the cursor there. You don't have to select the paragraph. And if you want to make format changes to several paragraphs, all you have to do is select those paragraphs first.

Inserting a Section Break for Formatting Purposes

When you want to change page numbering schemes, headers and footers, margin sizes, and page orientations in a document, you have to create a *section break* to start a new section. Word creates a new section for you when you create newspaper-style columns or change the size of margins.

Follow these steps to create a new section:
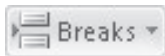
1. Click where you want to insert a section break.

Breaks ▾

2. On the Page Layout tab, click the Breaks button.

You open a drop-down list.

3. Under Section Breaks on the drop-down list, select a section break.

All four section break options create a new section, but they do so in different ways:

✦ **Next Page:** Inserts a page break as well as a section break so that the new section can start at the top of a new page (the next one). Select this option to start a new chapter, for example.

✦ **Continuous:** Inserts a section break in the middle of a page. Select this option if, for example, you want to introduce newspaper-style columns in the middle of a page.

✦ **Even Page:** Starts the new section on the next even page. This option is good for two-sided documents in which the headers on the left- and right-side pages are different.

✦ **Odd Page:** Starts the new section on the next odd page. You might choose this option if you have a book in which chapters start on odd pages. (By convention, that's where they start.)

REMEMBER

To delete a section break, make sure that you are in Draft view so that you can see section breaks, click the dotted line, and press the Delete key.

WARNING!

In the same way that paragraph marks store formats for a paragraph, section breaks store formats for an entire section. When you delete a section break, you apply new formats, because the section is folded into the section that formerly followed it and the section you deleted adopts that next section's formats. Because it's easy to accidentally delete a section break and create havoc, I recommend working in Draft view when your document has many section breaks. In Draft view, you can tell where a section ends because `Section Break` and a double dotted line appear on-screen. The only way to tell where a section ends in Print Layout view is to click the Show/Hide¶ button on the Home tab. (You can make section information appear on the status bar. Right-click the status bar and choose Section on the pop-up menu.)

Seeing what the formats are

Sometimes seeing how text was formatted merely by looking is difficult. However, by pressing Shift+F1, you can see precisely how text and paragraphs were formatted in the Reveal Formatting task pane. It describes how the text, paragraph, and section where the cursor is located are formatted.
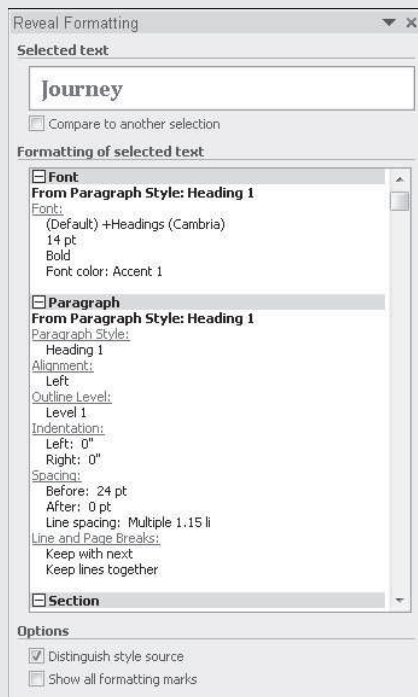
While the Reveal Formatting task pane is open, you can take advantage of these amenities:

✔ **Compare one part of a document to another:** Click the Compare to Another Section check box and then click another part of your document. The Reveal Formatting task pane describes how the two parts differ. Knowing how parts of a document differ can be invaluable when you're creating and modifying styles.

✔ **Find out which style was assigned:** Click the Distinguish Style Source check box. The task pane lists the style you assigned to the part of your document where the cursor is located.

✔ **See the formatting marks:** Click the Show All Formatting Marks check box. You can see where paragraphs end, where line breaks are, and where tab spaces were entered. Clicking this check box has the same results as clicking the Show/Hide¶ button on the Home tab.

Reveal Formatting

Selected text

Journey

☐ Compare to another selection

Formatting of selected text

⊟ **Font**
From Paragraph Style: Heading 1
Font:
    (Default) +Headings (Cambria)
    14 pt
    Bold
    Font color: Accent 1
⊟ **Paragraph**
From Paragraph Style: Heading 1
Paragraph Style:
    Heading 1
Alignment:
    Left
Outline Level:
    Level 1
Indentation:
    Left: 0"
    Right: 0"
Spacing:
    Before: 24 pt
    After: 0 pt
    Line spacing: Multiple 1.15 li
Line and Page Breaks:
    Keep with next
    Keep lines together
⊟ **Section**

Options

☑ Distinguish style source
☐ Show all formatting marks

Breaking a Line

To break a line of text before it reaches the right margin without starting a new paragraph, press Shift+Enter. Figure 2-1 shows how you can press Shift+Enter to make lines break better. The paragraphs are identical, but I broke lines in the right-side paragraph to make the text easier to read. Line breaks are marked with the ↵ symbol. To erase line breaks, click the Show/Hide¶ button to see these symbols and then backspace over them.

Figure 2-1: Break lines to make reading easier.

"A computer in every home and a chicken in every pot is our goal" stated Rupert T. Verguenza, president and CEO of the New Technics Corporation International at the annual shareholder meeting yesterday.

"A computer in every home and a chicken in every pot is our goal" stated Rupert T. Verguenza, president and CEO of the New Technics Corporation International at the annual shareholder meeting yesterday.

Starting a New Page

Word gives you another page so that you can keep going when you fill up one page. But what if you're impatient and want to start a new page right away? Whatever you do, *don't* press Enter again and again until you fill up the page. Instead, create a *hard page break* by doing one the following on the Insert tab:
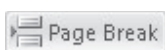
✦ Click the Page Break button (or press Ctrl+Enter). Word starts a new page at the cursor position. (You can also go to the Page Layout tab, click the Breaks button, choose Page on the drop-down list.)

✦ Click the Blank Page button. Word enters two hard page breaks to create an empty, blank page at the cursor position.

REMEMBER

In Draft view, you can click the Show/Hide¶ button on the Home tab and tell where you inserted a hard page break because you see the words `Page Break` and a dotted line on-screen. You can't tell where hard page breaks are in Print Layout view.

To delete a hard page break, switch to Draft view, click the Show/Hide¶ button on the Home tab, click the words `Page Break`, and press the Delete key.

Setting Up and Changing the Margins

Margins are the empty spaces along the left, right, top, and bottom of a page, as shown in Figure 2-2. Headers and footers fall, respectively, in the top and

bottom margins. And you can put graphics, text boxes, and page numbers in the margins as well. Margins serve to frame the text and make it easier to read.

Outside margin   Inside margins   Outside margin
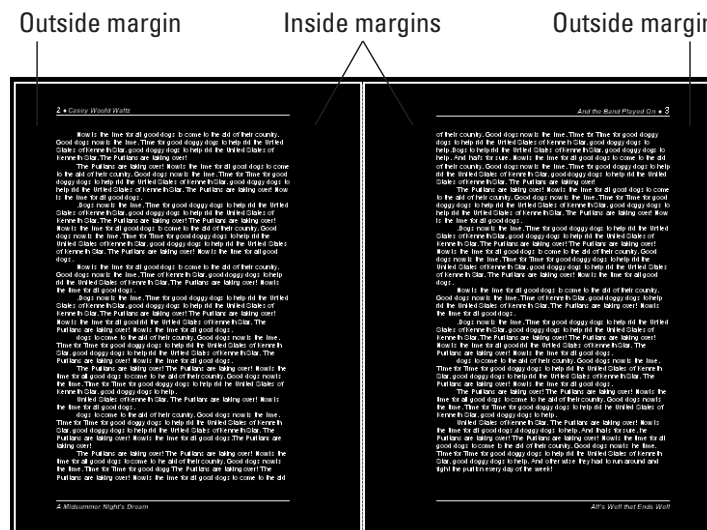
Figure 2-2:
Margins in a two-sided document.

When you start a new document, give a moment's thought to the margins. Changing the size of margins after you have entered the text, clip art, graphics, and whatnot can be disastrous. Text is indented from the left and right margins. Pages break on the bottom margin. If you change margin settings, indents and page breaks change for good or ill throughout your document. By setting the margins carefully from the beginning, you can rest assured that text will land on the page where you want it to land.

Don't confuse margins with indents. Text is indented from the margin, not from the edge of the page. If you want to change how far text falls from the page edge, indent it. To change margin settings in the middle of a document, you have to create a new section.

To set up or change the margins, go to the Page Layout tab and click the Margins button. You see a drop-down list with margin settings. Either choose a setting or select Custom Margins to open the Margins tab of the Page Setup dialog box and choose among these commands for handling margins:

✦ **Changing the size of the margins:** Enter measurements in the Top, Bottom, Left, and Right boxes to tell Word how much blank space to put along the sides of the page.

✦ **Making room for the gutter:** The *gutter* is the part of the paper that the binding eats into when you bind a document. Enter a measurement

in the Gutter box to increase the left or inside margin and make room for the binding. Notice on the pages of this book, for example, that the margin closest to the binding is wider than the outside margin. Choose Top on the Gutter Position menu if you intend to bind your document from the top, not the left, or inside, of the page. Some legal documents are bound this way.

✦ **Using mirror margins (inside and outside margins) in two-sided documents:** In a bound document in which text is printed on both sides of the pages, the terms left margin and right margin are meaningless. What matters instead is in the *inside margin*, the margin in the middle of the page spread next to the bindings, and the *outside margin*, the margin on the outside of the page spread that isn't affected by the bindings (refer to Figure 2-2). Choose Mirror Margins on the Multiple Pages drop-down list and adjust the margins accordingly if you intend to print on both sides of the paper.

✦ **Applying margin changes:** On the Apply To drop-down list, choose Whole Document to apply your margin settings to the entire document; This Section to apply them to a section; or This Point Forward to change margins in the rest of a document. When you choose This Point Forward, Word creates a new section.

If you're in a hurry to change margins, you can change them on the ruler. Display the ruler and drag the Left Margin, Right Margin, or Top Margin marker. You can find these markers by moving the pointer onto a ruler and looking for the two-headed arrow near a margin boundary. It appears, along with a pop-up label, when the pointer is over a margin marker.

TIP

To get a good look at where margins are, go to the File tab and choose Options. In the Word Options dialog box, select the Advanced category, and click the Show Text Boundaries check box (you'll find it under "Show Document Content").

Indenting Paragraphs and First Lines

An *indent* is the distance between a margin and the text, not the edge of the page and the text. Word offers a handful of ways to change the indentation of paragraphs. You can change the indentation of first lines as well as entire paragraphs. To start, select all or part of the paragraphs you want to re-indent (just click in a paragraph if you want to re-indent only one paragraph). Then click an Indent button, fiddle with the indentation marks on the ruler, or go to the Paragraph dialog box. All three techniques are described here.
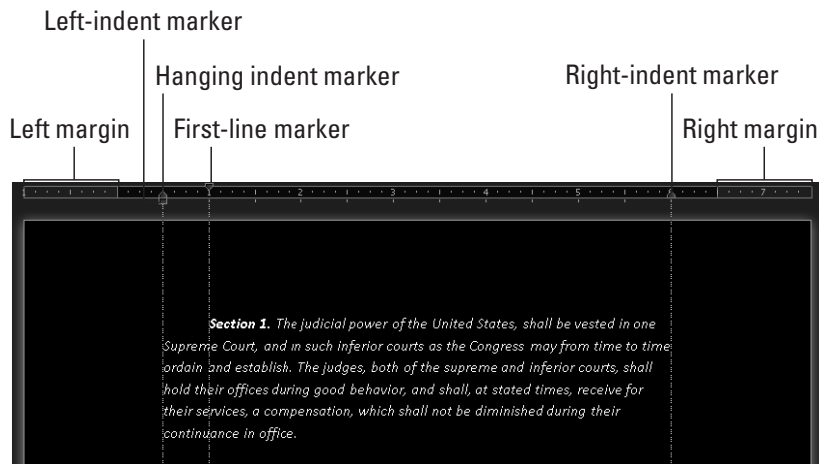
Clicking an Indent button (for left-indents)

On the Home tab, click the Increase Indent or Decrease Indent button (or press Ctrl+M or Ctrl+Shift+M) to move a paragraph a half inch farther away from or closer to the left margin. If you created tab stops, text is indented to the next or previous tab stop as well as to the next or previous half inch. This is the fastest way to indent text, although you can't indent first lines or indent from the right margin this way.

"Eye-balling it" with the ruler

You can also change indentations by using the ruler to "eyeball it." This technique requires some dexterity with the mouse, but it allows you to see precisely where paragraphs and the first lines of paragraphs are indented. If necessary, display the ruler by going to the View tab and clicking the Ruler check box. Then click in or select the paragraph or paragraphs that need indenting and use these techniques to re-indent them:

✦ **Indenting an entire paragraph from the left margin:** Drag the *left-indent marker* on the ruler to the right. Figure 2-3 shows where this marker is located. Dragging the left-indent marker moves the first-line indent marker as well.

Left-indent marker

Hanging indent marker   Right-indent marker

Left margin   First-line marker   Right margin

Figure 2-3:
Indenting
with the
ruler.

Section 1. *The judicial power of the United States, shall be vested in one Supreme Court, and in such inferior courts as the Congress may from time to time ordain and establish. The judges, both of the supreme and inferior courts, shall hold their offices during good behavior, and shall, at stated times, receive for their services, a compensation, which shall not be diminished during their continuance in office.*

✦ **Indenting the first line of a paragraph:** Drag the *first-line indent marker* to the right (refer to Figure 2-3). This marker determines how far the first line of the paragraph is indented.

✦ **Making a hanging indent:** Drag the *hanging indent marker* to the right of the first-line indent marker (refer to Figure 2-3). A *hanging indent* is one

in which the first line of a paragraph appears to "hang" into the margin because the second and subsequent lines are indented to the right of the start of the first line. Bulleted and numbered lists employ hanging indents.

✦ **Indenting an entire paragraph from the right margin:** Drag the *right-indent marker* to the left (refer to Figure 2-3).

Notice the shaded areas on the left and right side of the ruler. These areas represent the page margins.

Indenting in the Paragraph dialog box

Yet another way to indent a paragraph or first line is to visit the Paragraph dialog box. Click in or select the paragraph or paragraphs in question, go to the Home tab, and click the Paragraph group button. You see the Indents and Spacing tab of the Paragraph dialog box. Change the indentation settings. If you want to indent the first line or create a hanging indent, choose First Line or Hanging on the Special drop-down list and enter a measurement in the By box.

Numbering the Pages

How do you want to number the pages in your document? You can number them in sequence starting with the number 1, start numbering pages with a number other than 1, use Roman numerals or other number formats, and include chapter numbers in page numbers. What's more, you can number the pages differently in each section of your document as long as you divided your document into sections.

When it comes to numbering pages, you can proceed in two ways, as shown in Figure 2-4:

✦ Put a page number by itself on the pages of your document.

✦ Include the page number in the header or footer.

After you enter a page number, you can format it in different ways in the Page Number Format dialog box (see Figure 2-4) and (Header & Footer Tools) Design tab.

REMEMBER

To handle page numbers (as well as headers and footers), you must be in Print Layout view. Click the Print Layout view button on the status bar or go to the View tab and click the Print Layout button.

Page number included in a header

Page number by itself   Choose page number format options
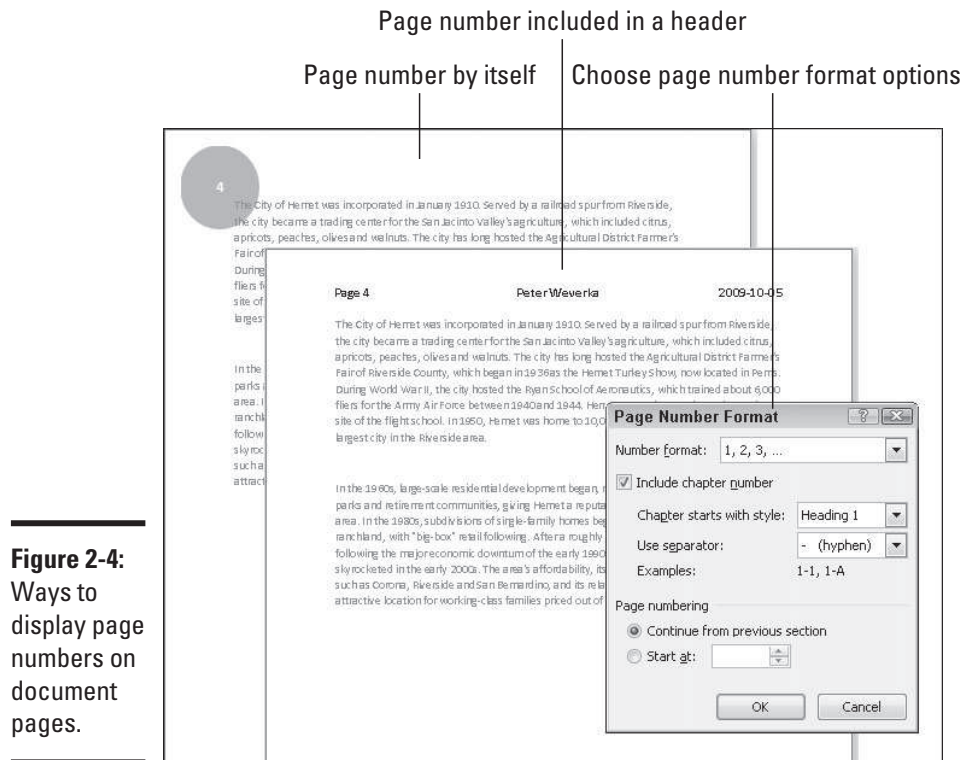
Figure 2-4:
Ways to
display page
numbers on
document
pages.

Numbering with page numbers only

Follow these steps to insert a page number by itself in the header, footer, or margin of the pages:
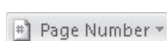
1. **On the Insert tab, click the Page Number button.**

2. **On the drop-down list, choose where on the page you want to put the page number (Top of Page, Bottom of Page, or Page Margins).**

3. **On the submenu that appears, choose a page number option.**

   The farther you scroll on the submenu, the fancier the page number formats are.

If you change your mind about the page number format you chose, switch to Print Layout view and double-click in the header or footer where the page number is displayed. The (Header & Footer Tools) Design tab opens. Click the Page Number button and make a different choice, or choose Remove Page Numbers.

Including a page number in a header or footer

To put the page number part in a header or footer, click in the header or footer where you want the page number to appear (later in this chapter, "Putting Headers and Footers on Pages" explains headers and footers). Then follow these steps to insert the page number:
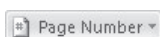
1. **On the (Header & Footer Tools) Design tab, click the Page Number button.**

2. **Choose Current Position.**

   You see a submenu with page number choices.

3. **Scroll through the submenu and choose a page number format.**

   The "Page X of Y" option is for listing the total number of pages in a document as well as the page number. For example, page 2 of a 10-page document is numbered "Page 2 of 10."

Changing page number formats

Change page number formats in the Page Number Format dialog box (refer to Figure 2-4). To display this dialog box, make sure that you're in Print Layout view and double-click your header or footer. Then use one of the following methods to change page number formats:
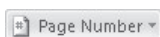
✦ On the Insert tab, click the Page Number button and choose Format Page Numbers.

✦ On the (Header & Footer Tools) Design tab, click the Page Number button and choose Format Page Numbers.

In the Page Number Format dialog box, make your page numbers just so:

✦ **Choosing a different number format:** Open the Number Format drop-down list and choose a page-numbering format. You can use numbers, letters, or roman numerals.

✦ **Including chapter numbers in page numbers:** If your document generates chapter numbers automatically from headings assigned the same style (a subject not covered in this book), you can include the chapter number in the page number. Click the Include Chapter Number check box, choose a style, and choose a separator to go between the chapter number and page number.

✦ **Numbering each section separately:** Click the Start At option button (not the Continue from Previous Section button) to begin counting pages anew at each section in your document. Earlier in this chapter, "Inserting a Section Break for Formatting Purposes" explains sections.

✦ **Start numbering pages at a number other than 1:** Click the Start At option button and enter a number other than 1.

TIP

To keep some pages in a document from being numbered, create a section for those pages, and then remove page numbers from the section. To paginate your document, Word skips the section you created and resumes numbering pages in the following section.

Putting Headers and Footers on Pages

A *header* is a little description that appears along the top of a page so that the reader knows what's what. Usually, headers include the page number and a title, and often the author's name appears in the header as well. A *footer* is the same thing as a header except that it appears along the bottom of the page, as befits its name.

These pages explain everything a mere mortal needs to know about headers and footers. Meanwhile, here are the ground rules for managing them:

✦ **Switching to Print Layout view:** To enter, read, edit, or delete headers and footers, you must be in Print Layout view. You can't see headers and footers in the other views.

✦ **Displaying the (Header & Footer Tools) Design tab:** As shown in Figure 2-5, you manage headers and footers by way of buttons on the (Header & Footer Tools) Design tab. To display this tab after you create a header or footer, switch to Print Layout view and double-click a header or footer.

✦ **Closing the (Header & Footer Tools) Design tab:** Click the Close Header & Footer button or double-click outside the header or footer.

✦ **Placing different headers and footers in the same document:** To change headers or footers in the middle of a document, you have to create a new section. See "Inserting a Section Break for Formatting Purposes" earlier in this chapter.

Figure 2-5:
Manage headers and footers on the (Header & Footer Tools) Design tab.
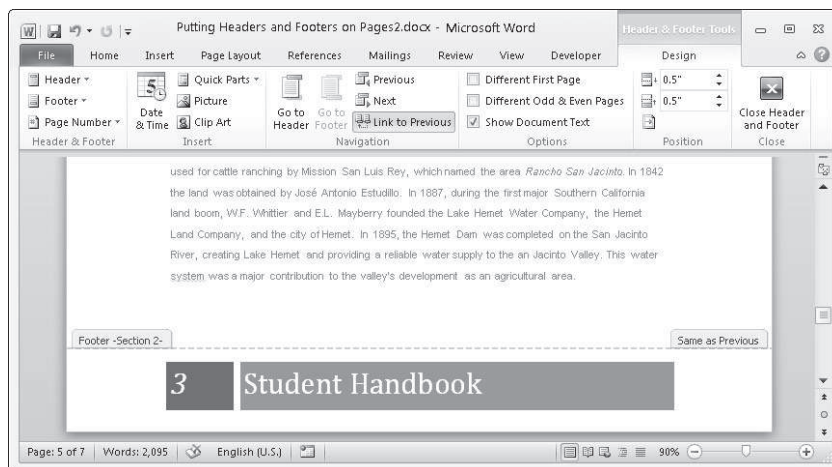
Creating, editing, and removing headers and footers

Follow these instructions to create, edit, and delete headers and footers:

✦ **Creating a header or footer:** On the Insert tab, click the Header or the Footer button, and choose a header or footer on the gallery. The gallery presents headers or footers with preformatted page numbers, dates, and places to enter a document title and author's name. Click More Headers (or Footers) from Office.com to download headers or footers from Microsoft. (Later in this chapter, "Fine-tuning a header or footer" explains how to insert the date and time and change headers and footers from section to section.)

✦ **Choosing a different header or footer:** Don't like the header or footer you chose? If necessary, double-click your header or footer to display the (Header & Footer Tools) Design tab. Then click the Header or Footer button and choose a new header or footer from the gallery.

✦ **Editing a header or footer:** Click the Header or the Footer button and choose Edit Header or Edit Footer on the drop-down list. The cursor moves into the header or footer so that you can enter or format text.

✦ **Changing the appearance of a header or footer:** Click a shape or text box in a header or footer and visit the (Drawing Tools) Format tab to change the shape or text box's color, background, or size. (Book I, Chapter 8 describes the drawing tools.)

✦ **Removing a header or footer:** Click the Header or Footer button and choose Remove Header or Remove Footer on the drop-down list.

To switch back and forth between the header and footer, click the Go to Header or Go to Footer button on the (Header & Footer Tools) Design tab.

As you work away on your header and footer, you can call on most of the text-formatting commands on the Home tab. You can change the text's font and font size, click an alignment button, and paste text from the Clipboard. Tabs are set up in most headers and footers to make it possible to center, left-align, and right-align text. You can click the Insert Alignment Tab button on the (Header & Footer Tools) Design tab to insert a new tab.

Fine-tuning a header or footer

Here is advice for making a perfect header on the (Header & Footer Tools) Design tab:

✦ **Inserting a page number:** See "Including a page number in a header or footer" and "Changing page number formats" earlier in this chapter.

✦ **Inserting the date and time:** Click the Date & Time button, choose a date format in the Date and Time dialog box, and click OK. Click the Update Automatically check box if you want the date to record when you print the document, not when you created your header or footer.

Creating your own header or footer for the gallery

When you click the Header or the Footer button on the Insert tab, a gallery appears with headers or footers. You can create your own header or footer and place it on this gallery. For example, create a header or footer with your company logo. After you design and create your header or footer, follow these instructions to wrangle with it:

✔ **Placing a header or footer in the gallery:** Select your header or footer by dragging over it or by clicking in the margin to its left. On the (Header & Footer Tools) Design tab, click the Quick Parts button and choose Save Selection to Quick Part Gallery. You see the Create New Building Block dialog box. Enter a descriptive name for the header or footer, choose Footers or Headers on the Gallery drop-down list, and click OK.

✔ **Inserting a header or footer you created:** On the Insert tab, click the Header or Footer button and choose your header or footer in the gallery. It is located in the

Built-In or General category, depending on where you chose to put it.

✔ **Removing and editing headers or footers:** On the Insert tab, click the Quick Parts button and choose Building Blocks Organizer. The Building Blocks Organizer dialog box appears. Select your header or footer and click the Delete button to remove it from the gallery or the Edit Properties button to change its name, gallery assignment, or category assignment.
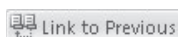
✦ **Changing headers and footers from section to section:** Use the Link to Previous button to determine whether headers and footers are different from section to section (you must divide the document into sections to have different headers and footers). Deselecting this button tells Word that you want your header or footer to be different from the header or footer in the previous section of the document; selecting this button (clicking it so that it looks selected) tells Word that you want your header or footer to be the same as the header or footer in the previous section of your document. To make a different header or footer, deselect the Link to Previous button and enter a different header or footer.

When the header or footer is the same as that of the previous section, the Header or Footer box reads `Same as Previous` (refer to Figure 2-5); when the header or footer is different from that of the previous section, the words `Same as Previous` don't appear. You can click the Previous or Next button to examine the header or footer in the previous or next section.

✦ **Different headers and footers for odd and even pages:** Click the Different Odd & Even Pages check box to create different headers and footers for odd and even pages. As "Setting Up and Changing the Margins" explains

earlier in this chapter, documents in which text is printed on both sides of the page can have different headers and footers for the left and right side of the page spread. The Header or Footer box reads Odd or Even to tell you which side of the page spread you're dealing with as you enter your header or footer.

✦ **Removing headers and footers from the first page:** Click the Different First Page check box to remove a header or footer from the first page of a document or section. Typically, the first page of letters and reports are not numbered.

Adjusting the Space Between Lines

To change the spacing between lines, select the lines whose spacing you want to change, or simply put the cursor in a paragraph if you're changing the line spacing throughout a paragraph (if you're just starting a document, you're ready to go). Then, on the Home tab, click the Line and Paragraph Spacing button and choose an option on the drop-down list.

To take advantage of more line-spacing options, click the Paragraph group button on the Home tab or choose Line Spacing Options on the Line and Paragraph Spacing button drop-down list. You see the Paragraph dialog box. Select an option on the Line Spacing drop-down list:

✦ **At Least:** Choose this one if you want Word to adjust for tall symbols or other unusual text. Word adjusts the lines but makes sure that there is, at minimum, the number of points you enter in the At box between each line.

✦ **Exactly:** Choose this one and enter a number in the At box if you want a specific amount of space between lines.

✦ **Multiple:** Choose this one and put a number in the At box to get triple-spaced, quadruple-, quintuple-, or any other number of spaced lines.

To quickly single-space text, click the text or select it if you want to change more than one paragraph, and press Ctrl+1. To quickly double-space text, select the text and press Ctrl+2. Press Ctrl+5 to put one and a half lines between lines of text.

Adjusting the Space between Paragraphs

Rather than press Enter to put a blank line between paragraphs, you can open the Paragraph dialog box and enter a point-size measurement in the Before or After text box. The Before and After measurements place a specific amount of space before and after paragraphs.

WARNING!

Truth be told, the Before and After options are for use with styles (a subject of the next chapter). When you create a style, you can tell Word to always follow a paragraph in a certain style with a paragraph in another style. For example, a paragraph in the Chapter Title style might always be followed by a paragraph in the Chapter Intro style. In cases like these, when you know that paragraphs assigned to one type of style will always follow paragraphs assigned to another style, you can confidently put space before and after paragraphs. But if you use the Before and After styles indiscriminately, you can end up with large blank spaces between paragraphs.

Go to the Home tab and use one of these techniques to adjust the amount of space between paragraphs:

✦ Click the Line and Paragraph Spacing button and choose Add Space Before Paragraph or Add Space after Paragraph on the drop-down list. These commands place 10 points of blank space before or after the paragraph that the cursor is in.

✦ Click the Paragraph group button to open the Paragraph dialog box, and enter point-size measurements in the Before and After boxes (or choose Auto in these boxes to enter one blank line between paragraphs in whatever your line-spacing choice is). The Don't Add Space between Paragraphs of the Same Style check box tells Word to ignore Before and After measurements if the previous or next paragraph is assigned the same style as the paragraph that the cursor is in.

Creating Numbered and Bulleted Lists

What is a word-processed document without a list or two? It's like an emperor with no clothes. Numbered lists are invaluable in manuals and books like this one that present a lot of step-by-step procedures. Use bulleted lists when you want to present alternatives to the reader. A *bullet* is a black, filled-in circle or other character. These pages explained numbered lists, bulleted lists, and multilevel lists.

Simple numbered and bulleted lists

The fastest, cleanest, and most honest way to create a numbered or bulleted list is to enter the text without any concern for numbers or bullets. Just press Enter at the end of each step or bulleted entry. When you're done, select the list, go to the Home tab, and click the Numbering or Bullets button. You can also click the Numbering or Bullets button and start typing the list. Each time you press Enter, Word enters the next number or another bullet.

Meanwhile, here are some tricks for handling lists:

✦ **Ending a list:** Press the Enter key twice after typing the last entry in the list. You can also right-click the list, choose Bullets or Numbering, and choose None on the submenu.

✦ **Removing the numbers or bullets:** Select the list and click the Numbering or Bullets button.

✦ **Adjusting how far a list is indented:** Right-click anywhere in the list, choose Adjust List Indents, and enter a new measurement in the Text Indent box.

✦ **Resuming a numbered list:** Suppose that you want a numbered list to resume where a list you entered earlier ended. In other words, suppose that you left off writing a four-step list, put in a graphic or some para- graphs, and now you want to resume the list at Step 5. Click the Numbering button to start numbering again. The AutoCorrect Options button appears. Click it and choose Continue Numbering, or right-click and choose Continue Numbering on the shortcut menu.

✦ **Starting a new list:** Suppose that you want to start a brand-new list right away. Right-click the number Word entered and choose Restart at 1 on the shortcut menu.

Constructing lists of your own

If you are an individualist and you want numbered and bulleted lists to work your way, follow these instructions for choosing unusual bullet characters and number formats:

Automatic lists and what to do about them

Word creates automatic lists for you whether you like it or not. To see what I mean, type the number 1, type a period, and press the space- bar. Word immediately creates a numbered list. In the same manner, Word creates a bulleted list when you type an asterisk (*) and press the spacebar.

Some people find this kind of behind-the- scenes skulduggery annoying. If you are one such person, do one of the following to keep Word from making lists automatically:

✔ Click the AutoCorrect Options button — it appears automatically — and choose Stop Automatically Creating Lists.

✔ On the File tab, choose Options, select the Proofing category in the Word Options dialog box, and click the AutoCorrect Options button. On the AutoFormat As You Type tab in the AutoCorrect dialog box, uncheck the Automatic Numbered Lists and Automatic Bulleted Lists check boxes.

✦ **Choosing a different numbering scheme:** On the Home tab, open the drop-down list on the Numbering button and choose a numbering scheme. You can also choose Define New Number Format. As shown in Figure 2-6, you see the Define New Number Format dialog box, where you can choose a number format, choose a font for numbers, and toy with number alignments.

✦ **Choosing a different bullet character:** On the Home tab, open the drop-down list on the Bullets button and choose a different bullet character on the drop-down list. You can also choose Define New Bullet to open the Define New Bullet dialog box, shown in Figure 2-6, and click the Symbol button to choose a bullet character in the Symbol dialog box (Book I, Chapter 2 describes symbols). The dialog box also offers opportunities for indenting bullets and the text that follows them in unusual ways.
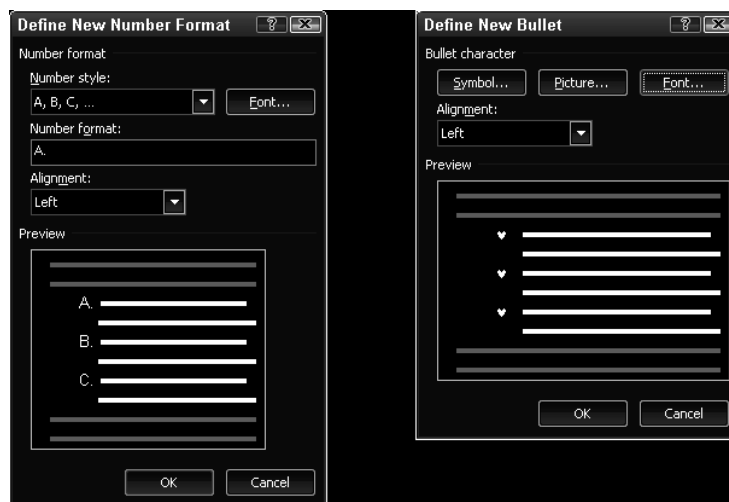
Figure 2-6:
Customizing a numbered or bulleted list.

Managing a multilevel list

A *multilevel list,* also called a *nested list*, is a list with subordinate entries, as shown in Figure 2-7. To create a multilevel list, you declare what kind of list you want, and then, as you enter items for the list, you indent the items that you want to be subordinate. Follow these steps to create a multilevel list:

1. **On the Home tab, click the Multilevel List button and choose what kind of list you want.**

   If none of the lists suit you, you can choose Define New Multilevel List and create a new kind of list in the Define New Multilevel List dialog box.

2. **Enter the items for the list, pressing Enter as you complete each one.**

3. **Select a list item (or items) and click the Increase Indent button (or press Ctrl+M) to make the items subordinate in the list; click the Decrease Indent button (or press Ctrl+Shift+M) to raise their rank in the list.**

   Repeat Step 3 until the list is just so.

Figure 2-7:
Examples
of multilevel
lists.
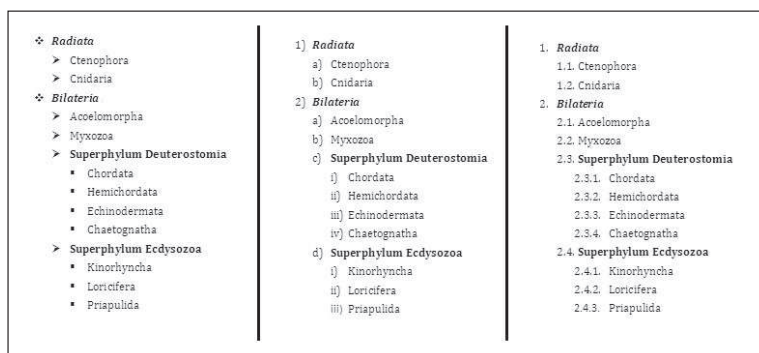
Working with Tabs

Tabs are a throwback to the days of the typewriter, when it was necessary to make tab stops in order to align text. Except for making leaders and aligning text in headers and footers, everything you can do with tabs can also be done by creating a table — and it can be done far faster. All you have to do is align the text inside the table and then remove the table borders. (Book I, Chapter 5 explains tables.)

A *tab stop* is a point around which or against which text is formatted. As shown in Figure 2-8, Word offers five tab types for aligning text: Left, Center, Right, Decimal, and Bar (a bar tab stop merely draws a vertical line on the page). When you press the Tab key, you advance the text cursor by one tab stop. Tab stops are shown on the ruler; symbols on the ruler tell you what type of tab you're dealing with.

By default, tabs are left-aligned and are set at half-inch intervals. Display the ruler (click the Ruler check box on the View tab) and follow these steps to change tabs or change where tabs appear on the ruler:

1. **Select the paragraphs that need different tab settings.**

2. **Click the Tab box on the left side of the ruler as many times as necessary to choose the kind of tab you want.**

   Symbols on the tab box indicate which type of tab you're choosing.

3. **Click on the ruler where you want the tab to go.**

   You can click as many times as you want and enter more than one kind of tab.

Click to choose a different tab stop Decimal tab

Left tab   Center tab   Right tab   Bar tab

Last Name	Title	City	Rating
Macy	President	Stamford	10.8
Childs	CFO	Rock Springs	44.378
Ng	VP	Needles	107.1
Munoz	Controller	Santa Fe	13.95
DeSilva	Officer	New Orleans	92.134
Manigault	CEO	Fairfax	49.3
Church	VP	San Carlos	114.93
Lee	CN	Bryland	90.00
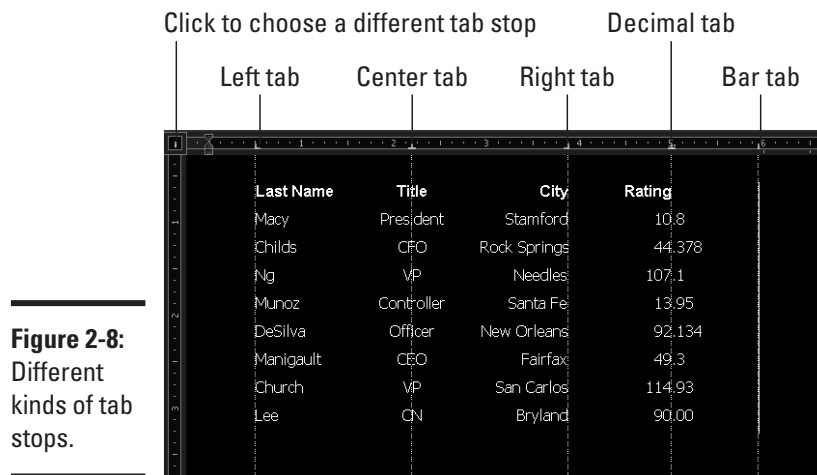
Figure 2-8: Different kinds of tab stops.

All about tab leaders

In my opinion, the only reason to fool with tabs and tab stops is to create tab leaders like the ones shown here. A *leader* is a series of punctuation marks — periods in the illustration — that connect text across a page. Leaders are very elegant. For the figure, I used left-aligned tab stops for the characters' names and right-aligned tab stops for the players' names. I included leaders so that you can tell precisely who played whom.

Follow these steps to create tab leaders:

1. **Enter the text and, in each line, enter a tab space between the text on the left side and the text on the right side.**

2. **Select the text you entered.**

3. **On the Home tab, click the Paragraph group button, and in the Paragraph dialog box, click the Tabs button.**

   You see the Tabs dialog box.

4. **Enter a position for the first new tab in the Tab Stop Position box.**

5. **Under Leader in the dialog box, select the punctuation symbol you want for the leader.**

6. **Click OK, display the ruler, and drag tab markers to adjust the space between the text on the left and right.**

THE PLAYERS

Romeo...McGeorge Wright
Juliet...Gabriela Hernandez
Mercutio...Chris Suzuki
Lady Capulet...Mimi Hornstein

To move a tab stop, drag it to a new location on the ruler. Text that is aligned with the tab stop moves as well. To remove a tab stop, drag it off the ruler. When you remove a tab stop, text to which it was aligned is aligned to the next remaining tab stop on the ruler or to the next default tab stop if you didn't create any tab stops of your own.

Sometimes it's hard to tell where tabs were put in the text. To find out, click the Show/Hide¶ button on the Home tab to see the formatting characters, including the arrows that show where the Tab key was pressed.

Hyphenating Text

The first thing you should know about hyphenating words is that you may not need to do it. Text that hasn't been hyphenated is much easier to read, which is why the majority of text in this book, for example, isn't hyphenated. It has a *ragged right margin,* to borrow typesetter lingo. Hyphenate only when text is trapped in columns or in other narrow places, or when you want a very formal-looking document.

Do not insert a hyphen simply by pressing the hyphen key, because the hyphen will stay there even if the word moves to the middle of a line and doesn't need to be broken in half. Instead, when a big gap appears in the right margin and a word is crying out to be hyphenated, put the cursor where the hyphen needs to go and press Ctrl+hyphen. This way, you enter what is called a *discretionary hyphen,* and the hyphen appears only if the word breaks at the end of a line. (To remove a manual hyphen, press the Show/Hide¶ button so that you can see it, and then backspace over it.)

Automatically and manually hyphenating a document
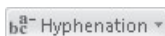
Select text if you want to hyphenate part of a document, not all of it, and use one of these techniques to hyphenate words that break on the end of a line of text:

✦ **Automatic hyphenation:** On the Page Layout tab, click the Hyphenation button and choose Automatic on the drop-down list. Word hyphenates your document (or a portion of your document, if you selected it first).

You can tell Word how to hyphenate automatically by clicking the Hyphenation button and choosing Hyphenation Options. You see the Hyphenation dialog box shown in Figure 2-9. Deselect the Hyphenate Words in CAPS check box if you don't care to hyphenate words in uppercase. Words that fall in the hyphenation zone are hyphenated, so

enlarging the hyphenation zone means a less ragged right margin but more ugly hyphens, and a small zone means fewer ugly hyphens but a more ragged right margin. You can limit how many hyphens appear consecutively by entering a number in the Limit Consecutive Hyphens To box.

Figure 2-9:
Telling Word how to hyphenate (left) and deciding where a hyphen goes (right).
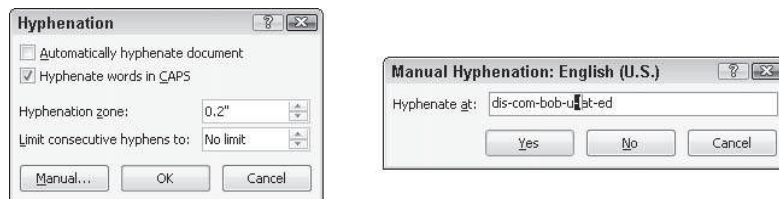
✦ **Manual hyphenation:** On the Page Layout tab, click the Hyphenation button and choose Manual on the drop-down list. Word displays a box with some hyphenation choices in it (refer to Figure 2-9). The cursor blinks on the spot where Word suggests putting a hyphen. Click Yes or No to accept or reject Word's suggestion. Keep accepting or rejecting Word's suggestions until the text is hyphenated.

Em and en dashes

Here is something about hyphens that editors and typesetters know, but the general public does not know: There is a difference between hyphens and dashes. Most people insert a hyphen where they ought to use an em dash or an en dash:

✔ An *em dash* looks like a hyphen but is wider — it's as wide as the letter *m*. The previous sentence has an em dash in it. Did you notice?

✔ An *en dash* is the width of the letter *n.* Use en dashes to show inclusive numbers or time periods, like so: pp. 45–50; Aug.–Sept. 1998; Exodus 16:11–16:18. An en dash is a little bit longer than a hyphen.

To place an em or en dash in a document and impress your local typesetter or editor, not to mention your readers, press Ctrl+Alt+– (the minus sign key on the Numeric keypad) to enter an em dash, or Ctrl+– (on the numeric keypad) to enter an en dash. You can also go to the Insert tab, click the Symbol button, choose More Symbols on the drop-down list, select the Special Characters tab in the Symbol dialog box, and choose Em Dash or En Dash.

Unhyphenating and other hyphenation tasks

More hyphenation esoterica:

✦ **Unhyphenating:** To "unhyphenate" a document or text you hyphenated automatically, go to the Page Layout tab, click the Hyphenation button, and choose Hyphenation Options. In the Hyphenation dialog box (refer to Figure 2-9), deselect the Automatically Hyphenate Document check box and click OK.

✦ **Preventing text from being hyphenated:** Select the text and, on the Home tab, click the Paragraph group button. In the Paragraph dialog box, select the Line and Page Breaks tab, and select the Don't Hyphenate check box. (If you can't hyphenate a paragraph, it's probably because this box was selected unintentionally.)

Chapter 3: Word Styles

Welcome to what may be the most important chapter of this book — the most important in Book II, anyway. Styles can save a ridiculous amount of time that you would otherwise spend formatting and wrestling with text. And many Word features rely on styles. You can't create a table of contents or use the Navigation pane unless each heading in your document has been assigned a heading style. Nor can you take advantage of Outline view and the commands for moving text around in that view. You can't cross-reference headings or number the headings in a document.

If you want to be stylish, at least where Word is concerned, you have to know about styles.

All about Styles

A *style* is a collection of formatting commands assembled under one name. When you apply a style, you give many formatting commands simultaneously, and you spare yourself the trouble of visiting numerous tabs and dialog boxes to format text. Styles save time and make documents look more professional. Headings assigned the same style — Heading1, for example — all look the same. When readers see that headings and paragraphs are consistent with one another across all the pages of a document, they get a warm, fuzzy feeling. They think the person who created the document really knew what he or she was doing.

Styles and templates

Every document comes with built-in styles that it inherits from the template with which it was created. You can create your own styles to supplement styles from the template. For that matter, you can create a template, populate it with styles you design, and use your new template to create distinctive letters or reports for your company.

A simple document created with the Blank Document template — a document that you create by pressing Ctrl+N — has only a few styles, but a document that was created with a sophisticated template comes with many styles. The Oriel Report template, for example, comes with styles for formatting titles, subtitles, headings, and quotations. Figure 3-1 illustrates how choosing styles from a template changes text formatting. Notice how choosing style options in the Styles pane reformats the text.
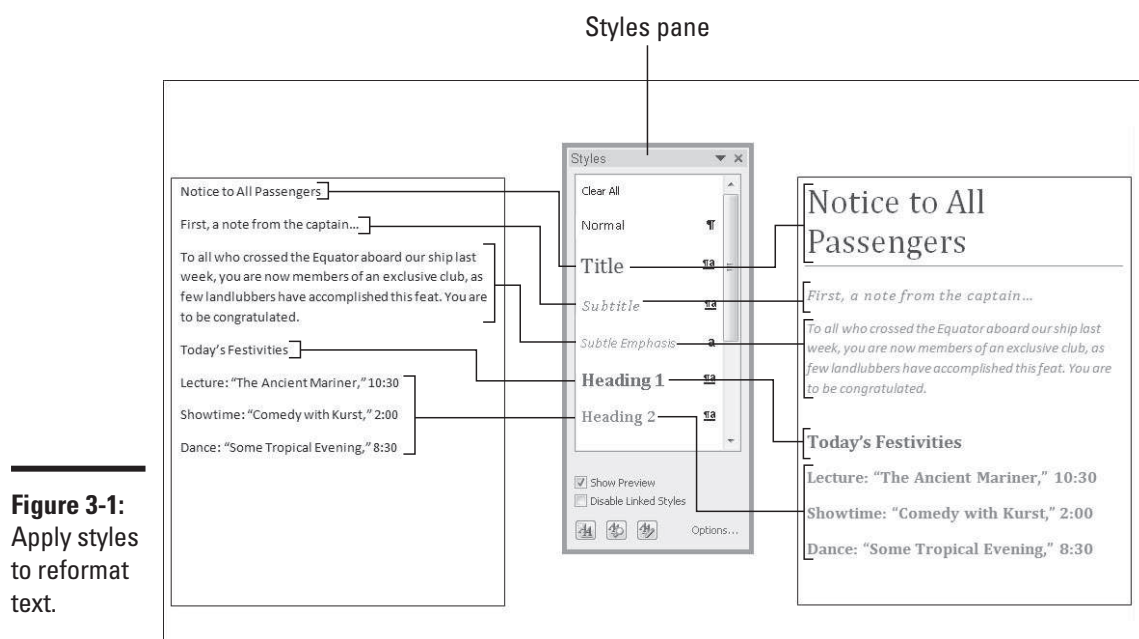
Styles pane

Figure 3-1:
Apply styles
to reformat
text.

Types of styles

In the Styles pane (refer to Figure 3-1), the symbol next to each style name tells you what type of style you're dealing with. Word offers four style types:

✦ **Paragraph styles:** Determine the formatting of entire paragraphs. A paragraph style can include these settings: font, paragraph, tab, border, language, bullets, numbering, and text effects. Paragraph styles are marked with the paragraph symbol (¶).

✦ **Character styles:** Apply to text, not to paragraphs. You select text before you apply a character style. Create a character style for text that is hard to lay out and for foreign-language text. A character style can include these settings: font, border, language, and text effects. When you apply a character style to text, the character-style settings override the paragraph-style settings. For example, if the paragraph style calls for 14-point Arial font but the character style calls for 12-point Times Roman font, the character style wins. Character styles are marked with the letter *a*.

Ta ✦ **Linked (paragraph and character):** Apply paragraph formats as well as text formats throughout a paragraph. These styles are marked with the paragraph symbol (¶) as well as the letter *a*.

Applying Styles to Text and Paragraphs

Word offers several ways to apply a style, and you are invited to choose the one that works best for you. These pages explain how to apply a style and tell Word how to present style names in the various places where style names are presented for your enjoyment and pleasure.

Applying a style

REMEMBER

The first step in applying a style is to select the part of your document that needs a style change:

✦ **A paragraph or paragraphs:** Because paragraph styles apply to all the text in a paragraph, you need only click in a paragraph before applying a style to make a style apply throughout the paragraph. To apply a style to several paragraphs, select all or part of them.

✦ **Text:** To apply a character style, select the letters whose formatting you want to change.

Next, apply the style with one of these techniques:

✦ **Quick Style gallery:** On the Home tab, choose a style in the Quick Style gallery (depending on the size of your screen, you may have to click the Quick Styles button first). Figure 3-2 shows where the Quick Style gallery is located. The formatted letters above each style name in the gallery show you what your style choice will do to paragraphs or text. You can ”live-preview” styles on the Quick Style gallery by moving the pointer over style names.

✦ **Styles pane:** On the Home tab, click the Styles group button to open the Styles pane, and select a style, as shown in Figure 3-2. Click the Show Preview check box at the bottom of the Styles pane to see formatted style names in the pane and get an idea of what the different styles are. You can drag the Styles pane to different locations on your screen. It remains on-screen after you leave the Home tab.

✦ **Apply Styles task pane:** Choose a style on the Apply Styles task pane, as shown in Figure 3-2. To display this task pane, go to the Home tab, open the Quick Style gallery, and choose Apply Styles (look for this option at the bottom of the gallery). You can drag the Apply Styles task pane to a corner of the screen. As does the Styles pane, the Apply Styles task pane remains on-screen after you leave the Home tab.

Quick Style gallery   Styles pane
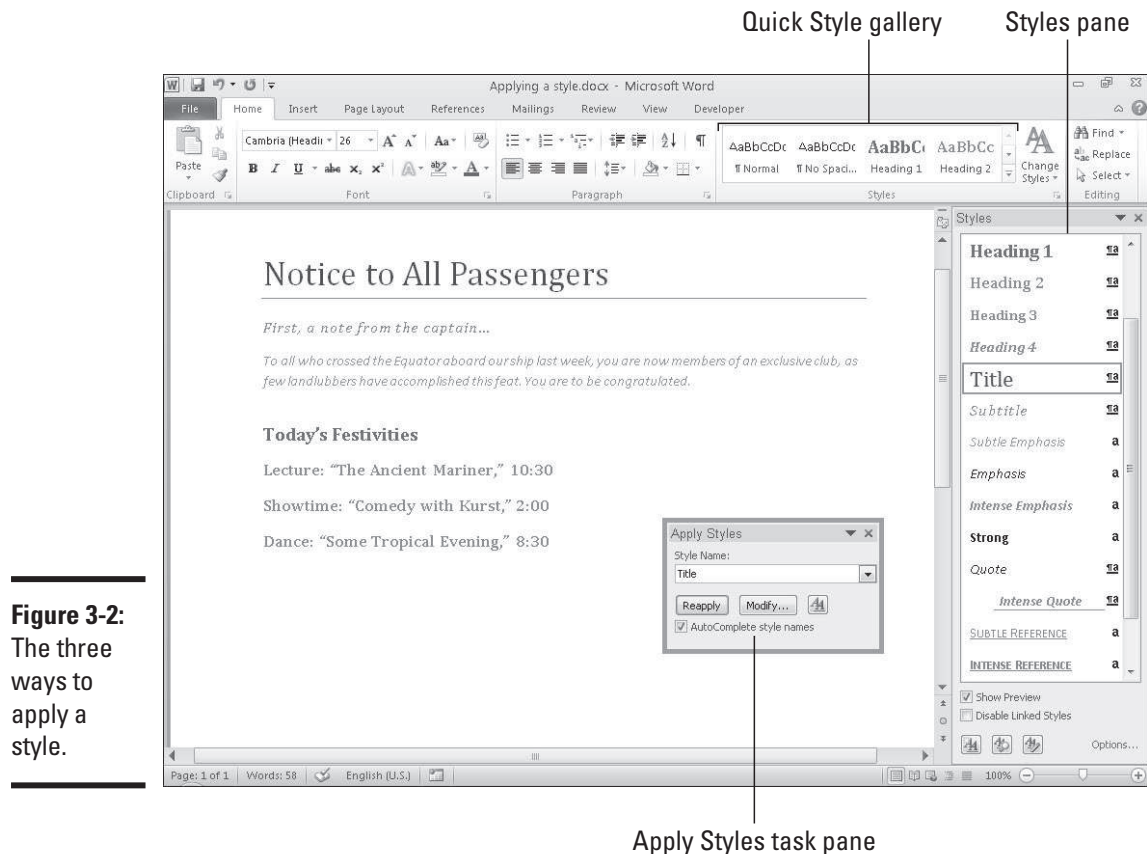
Figure 3-2:
The three ways to apply a style.

Apply Styles task pane

TIP To strip a paragraph or text of its style and give it the generic Normal style, select it and choose Clear Formatting in the Quick Style gallery or Clear All at the top of the Styles pane.

Keyboard shortcuts for applying styles

A handful of keyboard shortcuts can be very handy when applying paragraph styles:

✔ Normal: Ctrl+Shift+N

✔ Heading 1: Ctrl+Alt+1

✔ Heading 2: Ctrl+Alt+2

✔ Heading 3: Ctrl+Alt+3

✔ Next higher heading: Alt+Shift+←

✔ Next lower heading: Alt+Shift+→

You can assign keyboard shortcuts to styles. Book VIII, Chapter 1 explains how.

Experimenting with style sets

A *style set* is a slight variation on the styles in the template you chose when you created your document. Style sets include Classic, Elegant, Fancy, and Modern. Choosing a style set imposes a slightly different look on your document — you make it classier, more elegant, fancier, or more modern. All templates, even those you create yourself, offer style sets. Style sets are a convenient way to experiment with the overall look of a document.

To experiment with style sets, go to the Home tab, click the Change Styles button, choose Style Set on the drop-down list, and do one of the following:

✦ **Choose a new style set:** Select a style set on the submenu.

✦ **Use the original styles in the template:** Choose Reset to Quick Styles from Template on the submenu.

Choosing which style names appear on the Style menus

One of the challenges of applying styles is finding the right style to apply in the Quick Style gallery, Styles pane, or Apply Styles task pane (refer to Figure 3-2). All three can become crowded with style names. To make finding and choosing styles names easier, you can decide for yourself which names appear on the three style menus.

Quick Style gallery

In the Quick Style gallery, remove a style name by right-clicking it and choosing Remove from Quick Style gallery. If you regret removing style names, click the Change Styles button and choose Style Set⇨Reset to Quick Styles from Template.

Styles pane and Apply styles task pane

To decide for yourself which style names appear in the Styles pane and Apply Styles task pane, click the Styles group button, and in the Styles pane, click the Options link (you can find this link near the bottom of the pane). You see the Style Pane Options dialog box shown in Figure 3-3. Choose options to tell Word which style names appear in the Styles pane and Apply Styles task pane:

✦ **Select Styles to Show:** Choose All Styles to show all style names. The other options place a subset of names in the window and task pane. Recommended style names are those Microsoft thinks you need most often.

Figure 3-3: Deciding which names to put in the Styles pane and Apply Styles task pane.
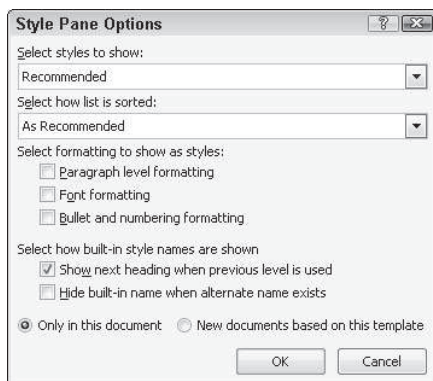
✦ **Select How List Is Sorted:** Choose an option to describe how to list styles. Except for Based On, these options, I think, are self-explanatory. The Based On option lists styles in alphabetical order according to which style each style is based on (later in this chapter, "Creating a style from the ground up" explains how the Based On setting is used in constructing styles).

✦ **Select Formatting to Show As Styles:** Choose options to declare which styles to list — those that pertain to paragraph-level formatting, fonts, and bulleted and numbered lists.

Determining which style is in use

How can you tell which style has been applied to a paragraph or text? Sometimes you need to know which style is in play before you decide whether applying a different style is necessary.

Click the paragraph or text and use these techniques to find out which style was applied to it:

✔ **Glance at the Quick Style gallery and Styles pane to see which style is selected.** The selected style is the one that was applied to your paragraph or text.

✔ **Click the Style Inspector button at the bottom of the Styles pane.** The Style Inspector pane opens and lists the current style.

✔ **Press Shift+F1.** The Reveal Formatting task pane opens. It lists the style that was applied to the paragraph or text.

If you're especially keen to know about styles in your document, you can make style names appear to the left of the text in Outline and Draft view. On the Find tab, choose Options. In the Word Options dialog box, go to the Advanced tab and enter .5 or another measurement in the Style Area Pane Width in Draft and Outline Views box (look for this box under "Display"). You can drag the border of the Style Area pane to enlarge or shrink it.

✦ **Select How Built-In Style Names Are Shown:** Choose options to tell how to handle built-in styles, the obscure styles that Word applies on its own when you create tables of contents and other self-generating lists.

✦ **Apply to this document or to the template as well:** Click the Only in This Document option button to apply your choices only to the document you're working on; click the New Documents Based on This Template option button to apply your choices to your document and to all future documents you create with the template you're using.

Creating a New Style

You can create a new style by creating it from a paragraph or building it from the ground up. To do a thorough job, build it from the ground up because styles you create this way can be made part of the template you are currently working in and can be copied to other templates (later in this chapter, "Creating and Managing Templates" explains templates).

Creating a style from a paragraph

Follow these steps to create a new style from a paragraph:

1. **Click in a paragraph whose formatting you want to turn into a style.**

2. **Right-click and choose Styles⇨Save Selection As a New Quick Style.**

   You see the Create New Style from Formatting dialog box. You can also open this dialog box by opening the Quick Style gallery and choosing Save Selection As a New Quick Style.

3. **Enter a name for your new style.**

4. **Click OK.**

   A style you create this way becomes a part of the document you're working on; it isn't made part of the template from which you created your document.

Creating a style from the ground up

To make a style available in documents you will create in the future, make it part of a template and build it from the ground up. In the Styles pane, click the New Style button (you can find it at the bottom of the pane). You see the Create New Style from Formatting dialog box shown in Figure 3-4. Fill in the dialog box and click OK.

Figure 3-4:
Creating
a brand-
spanking-
new style.
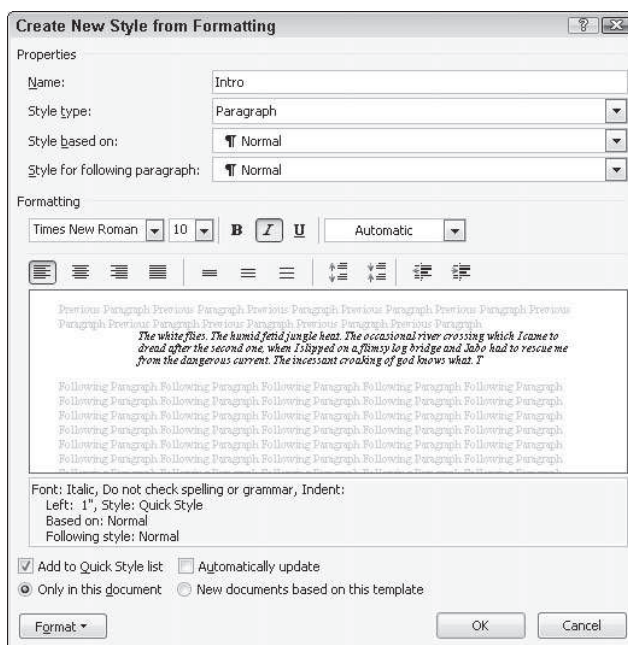
Here's a rundown of the options in the Create New Style from Formatting dialog box:

✦ **Name:** Enter a descriptive name for the style.

✦ **Style Type:** On the drop-down list, choose a style type ("Types of styles," earlier in this chapter, describes the style types).

✦ **Style Based On:** If your new style is similar to a style that is already part of the template with which you created your document, choose the style to get a head start on creating the new one. Be warned, however, that if you or someone else changes the Based On style, your new style will inherit those changes and be altered as well.

✦ **Style for Following Paragraph:** Choose a style from the drop-down list if the style you're creating is always followed by an existing style. For example, a new style called Chapter Title might always be followed by a style called Chapter Intro Paragraph. For convenience, someone who applies the style you're creating and presses Enter automatically applies the style you choose here on the next line of the document. Applying a style automatically to the following paragraph saves you the trouble of having to apply the style yourself.

✦ **Formatting:** Choose options from the menus or click buttons to fashion or refine your style (you can also click the Format button to do this).

✦ **Add to Quick Style List:** Select this check box to make the style's name appear in the Quick Style gallery, Styles pane, and Apply Styles task pane.

✦ **Automatically Update:** Normally, when you make a formatting change to a paragraph, the style assigned to the paragraph does not change at all, but the style does change if you check this box. Checking this box tells Word to alter the style itself each time you alter a paragraph to which you've assigned the style. With this box checked, all paragraphs in the document that were assigned the style are altered each time you change a single paragraph that was assigned the style.

✦ **Only in This Document/New Documents Based on This Template:** To make your style a part of the template from which you created your document as well as the document itself, click the New Documents Based on This Template option button. This way, new documents you create that are based on the template you are using can also make use of the new style.

✦ **Format:** This is the important one. Click the button and make a formatting choice. Word takes you to dialog boxes so that you can create or refine the style.

Modifying a Style

What if you decide at the end of an 80-page document that all 35 introductory paragraphs to which you assigned the Intro Para style look funny? If you clicked the Automatically Update check box in the New Style dialog box when you created the style, all you have to do is alter a paragraph to which you assigned the Intro Para style to alter all 35 introductory paragraphs. However, if you decided against updating styles automatically, you can still change the introductory paragraphs throughout your document.

Follow these steps to modify a style that isn't updated automatically:

1. **Click in any paragraph, table, or list to which you've assigned the style; if you want to modify a character style, select the characters to which you've assigned the style.**

2. **In the Styles pane or Apply Styles task pane, make sure that the name of the style you want to modify is selected.**

If the right name isn't selected, select it now in the Styles pane or Apply Styles task pane.

3. **In the Styles pane, open the style's drop-down list and choose Modify; in the Apply Styles task pane, click the Modify button.**

You see the Modify Style dialog box. Does the dialog box look familiar? It is nearly identical to the Create New Style from Formatting dialog box you used to create the style in the first place (refer to Figure 3-4). The only difference is that you can't choose a style type in the Modify Style dialog box.

4. **Change the settings in the Modify Styles dialog box and click OK.**

The previous section in this chapter explains the settings.

After you modify a style, all paragraphs or text to which the style was assigned are instantly changed. You don't have to go back and reformat text and paragraphs throughout your document.

Creating and Managing Templates

As I explain at the start of this chapter, every document you create is fashioned from a *template*. The purpose of a template is to store styles for documents. In the act of creating a document, you choose a template, and the styles on the template become available to you when you work on your document (Chapter 1 of this mini-book explains how to choose a template when you create a new document).

For example, when you double-click the Blank Template icon in the Available Templates window or press Ctrl+N, you create a document with the Blank Document template, a relatively simple template with few styles. When you create a document with a template from Office.com or a template from the New dialog box, more styles are available to you because these templates are more sophisticated.

To save time formatting your documents, you are invited to create templates with styles that you know and love. You can create a new template from scratch, create a template from a document, or create a template by assembling styles from other templates and documents. Styles in templates, like styles in documents, can be modified, deleted, and renamed.

Creating a new template

How do you want to create a new template? You can do it from scratch, create a new template from a document, or assemble styles from other templates. Read on.

To create a document from a template you created yourself, open the Available Templates window (on the File tab, choose New) and click the My Templates icon. The New dialog box opens. Select your template and click the Open button.

Creating a template from scratch

Follow these steps to create a template from scratch:

1. **On the File tab, choose New.**

   The Available Templates window opens.

2. **Click the My Templates icon to open the New dialog box.**

3. **Select the Blank Document icon.**

4. **Select the Template option button.**

   This option button is located in the lower-right corner of the dialog box.

5. **Click OK.**

   Your template appears in the Word window.

Create, modify, and delete styles as necessary (see "Creating a New Style" and "Modifying a Style," earlier in this chapter). Click the Save button to save your template, and in the Save As dialog box, enter a name for the template and click the Save button.

Creating a template from a document

If a document has all or most of the styles you want for a template, convert the document into a template so that you can use the styles in documents you create in the future. Follow these steps to create a Word template from a Word document:

1. **Open the Word document you will use to create a template.**

2. **On the File tab, choose Save As.**

   The Save As dialog box appears.

3. **Enter a name for your template.**

4. **Open the Save As Type menu and choose Word Template.**

5. **Under Favorite Links, click Templates to see the folder where templates are stored.**

6. **Click the Save button.**

Probably your new template includes text that it inherited from the document it was created from. Delete the text (unless you want it to appear in documents you create from your new template).

Assembling styles from other documents and templates

The third way to create a new template is to create a template from scratch and then gather styles from other documents and templates in your new template. Later in this chapter, "Copying styles from different documents and templates" explains how to assemble styles into a template.

Where templates are stored

Templates are stored in the Templates folder. To copy, move, or send templates, and to trade styles between templates, you have to know where the Templates folder is located on your computer. Where templates are stored by default depends on which version of Windows your computer runs:

- **Windows 7 and Windows Vista:** `C:\Users\ Username\AppData\Roaming\ Microsoft\Templates` folder.

- **Windows XP:** `C:\Documents and Settings\Username\ Application Data\Microsoft\ Templates` folder.

If you're having trouble finding the Templates folder, you can find out where it is located with these techniques:

- On the File tab, choose Options. In the Word Options dialog box, go to the Advanced Category and scroll to the File Locations button. Clicking this button opens the File Locations dialog box, where, under User Templates, you can see the name of the folder in which your templates are stored.

- On the File tab, choose New. In the Available Templates window, click the My Templates icon. The New dialog box appears. Right-click a template and choose Properties. The Properties dialog box lists the location of the folder where the templates are stored.

Opening a template so that you can modify it

Open a template the same way you open a document. On the File tab, choose Open. You see the Open dialog box. Under Favorite Links, click Templates and then double-click the name of the template. It opens in the Word window. Style modifications you make in the template become available to all documents that were fashioned from the template.

Copying styles from different documents and templates

Suppose that you like a style in one document and you want to copy it to another so that you can use it there. Or you want to copy it to a template to make it available to documents created with the template. Read on to find out how to copy styles between documents and between templates.

Copying a style from one document to another

Copy a style from one document to another when you need the style on a one-time basis. Follow these steps:

1. **Select a paragraph that was assigned the style you want to copy.**

Be sure to select the entire paragraph. If you want to copy a character style, select text to which you have assigned the character style.

2. **Press Ctrl+C or right-click and choose Copy to copy the paragraph to the Clipboard.**

3. **Switch to the document you want to copy the style to and press Ctrl+V or click the Paste button on the Home tab.**

4. **Delete the text you just copied to your document.**

The style remains in the Styles pane and Quick Style gallery even though the text is deleted. You can call upon the style whenever you need it.

Copying styles to a template

Use the Organizer to copy styles from a document to a template or from one template to another. After making a style a part of a template, you can call upon the style in other documents. You can call upon it in each document you create or created with the template. Follow these steps to copy a style into a template:

1. **Open the document or template with the styles you want to copy.**

Earlier in this chapter, "Opening a template so that you can modify it" explains how to open a template.

2. **In the Styles pane, click the Manage Styles button.**

This button is located at the bottom of the window. The Manage Styles dialog box appears.

3. **Click the Import/Export button.**

You see the Organizer dialog box shown in Figure 3-5. Styles in the document or template that you opened in Step 1 appear in the In list box on the left side.

Select the styles you want to copy
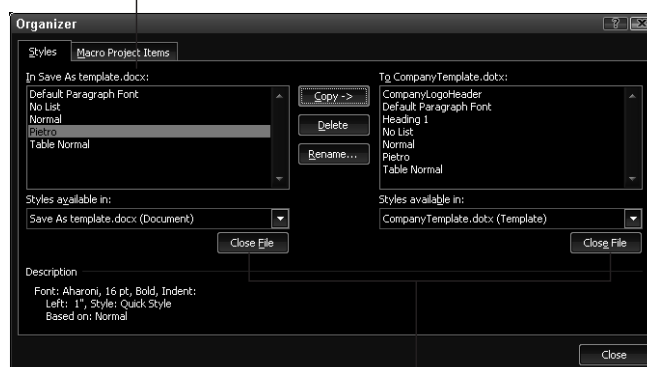
Figure 3-5: Copying styles to a template.

Click to close one template and open another

4. **Click the Close File button on the right side of the dialog box.**

The button changes names and becomes the Open File button.

5. **Click the Open File button and, in the Open dialog box, find and select the template to which you want to copy styles; then, click the Open button.**

You can click the Templates button (under Favorite Links) to open the Templates folder where templates are located. See the sidebar "Where templates are stored," earlier in this chapter, if you have trouble finding the Templates folder.

The names of styles in the template you chose appear on the right side of the Organizer dialog box.

6. **In the Organizer dialog box, Ctrl+click to select the names of styles on the left side of the dialog box that you want to copy to the template listed on the right side of the dialog box.**

As you click the names, they become highlighted.

7. **Click the Copy button.**

The names of styles that you copied appear on the right side of the Organizer dialog box.

8. **Click the Close button and click Save when Word asks whether you want to save the new styles in the template.**

Attaching a different template to a document

It happens in the best of families. You create or are given a document only to discover that the wrong template is attached to it. For times like those, Word gives you the opportunity to switch templates. Follow these steps:

1. **On the Developer tab, click the Document Template button.**

   You see the Templates and Add-Ins dialog box. If the Developer tab isn't displayed on your screen, go to the File tab, choose Options, visit the Customize Ribbon category in the Word Options dialog box, select the Developer check box, and click OK.

2. **Click the Attach button to open the Attach Template dialog box.**

3. **Find and select the template you want and click the Open button.**

   You return to the Templates and Add-ins dialog box, where the name of the template you chose appears in the Document Template box.

4. **Click the Automatically Update Document Styles check box.**

   Doing so tells Word to apply the styles from the new template to your document.

5. **Click OK.**

Modifying, deleting, and renaming styles in templates

Modify, delete, and rename styles in a template the same way you do those tasks to styles in a document (see "Modifying a Style," earlier in this chapter). However, in the Modify Style dialog box, select the New Documents Based on This Template option button before clicking OK.

Your style modifications will apply to all documents you create in the future with your template. For the style modifications to take effect in documents you already created with your template, tell Word to automatically update document styles in those documents. Follow these steps:

1. **Save and close your template if it is still open.**

   If any documents you fashioned from the template are open, close them.

2. **Open a document that you want to update with the style modifications you made to the template.**

3. **Go to the Developer tab.**

   To display this tab if necessary, open the File tab, choose Options, go to the Customize Ribbon category in the Word Options dialog box, select the Developer check box, and click OK.

4. **Click the Document Template button.**

   The Templates and Add-ins dialog box opens. It should list the path to the Templates folder and the template you modified. If the wrong template is listed, click the Attach button and select the correct template in the Attach Template dialog box.

5. **Select the Automatically Update Document Styles check box.**

6. **Click OK.**

Chapter 4: Desktop Publishing with Word

In This Chapter

✔ **Considering ways to desktop-publish in Word**

✔ **Fine-tuning tables**

✔ **Wrapping text around graphics and other objects**

✔ **Running text in newspaper-style columns**

✔ **Putting text boxes in documents**

✔ **Putting borders on pages**

✔ **Decorating pages with drop caps and watermarks**

✔ **Printing landscape documents and on varying sizes of paper**

*O*nce upon a time, word processors were nothing more than glorified typewriters. They were good for typing and basic formatting, and not much else. But over the years, Microsoft Word has become a desktop publishing program in its own right. This chapter explains a few desktop publishing features that can make your documents stand out in the crowd — columns, text boxes, page borders, watermarks, and drop caps, to name a few.

Making Use of Charts, Diagrams, Shapes, Clip Art, and Photos

Figure 4-1 shows a newsletter that includes a chart, diagram, shape, clip-art image, and photo. You are invited to include these items in your Word documents, and you'll be glad to know that including them isn't very much trouble.

✦ **Charts:** A chart is an excellent way to present data for comparison purposes. The pie slices, bars, columns, or lines tell readers right away which business is more productive, for example, or who received the most votes. Book I, Chapter 6 explains how to create charts.

Figure 4-1:
This
newsletter
includes a
photo, chart,
diagram,
shape, and
clip-art
image.

✦ **Diagrams:** A diagram allows readers to quickly grasp an idea, relation-ship, or concept. Instead of explaining an abstract idea, you can portray it in a diagram. Book I, Chapter 7 explains diagrams.

✦ **Shapes and lines:** Shapes and lines can also illustrate ideas and con-cepts. You can also use them for decorative purposes in Word docu-ments. Book I, Chapter 8 explains how to draw lines, arrows, and shapes.

✦ **Clip-art images:** Clip-art images make a document livelier. They add a little color to documents. Book VIII, Chapter 4 explains how to place clip-art images in documents.

✦ **Photos:** A well-placed photo or two can make a newsletter or brochure that much more attractive. Book VIII, Chapter 3 explains how to include photos in Word documents.

Constructing the Perfect Table

Create a table to present raw data to your readers or plead your case with numbers and facts. Provided the row labels and column headings are descriptive, looking up information in a table is the easiest way to find it. And tables impose order on chaos. What used to be a knotty lump of nonde-script data can be turned into an orderly statement of fact if the data is pre-sented in a table. No report is complete without one or two of them.

Fitting a table on the page

Ideally, a table should fit on a single page, because studying table data that is spread across two or more pages can be difficult. Here are some suggestions for fitting a table on a single page:

✔ **Present the table in landscape mode.** In Landscape mode, a page is turned on its ear so that it is wider than it is tall and you have room for more columns. To print in Landscape mode, however, you must create a new section for the pages in question. Later in this chapter, "Landscape Documents" explains how to switch from portrait to landscape mode.

✔ **Shrink the font size.** Sometimes shrinking the font size throughout a table shrinks the table just enough to fit it on a page. To shrink fonts throughout a table, go to the Home tab and click the Shrink Font button (or press Ctrl+[). Keep shrinking the font size until the table fits on one page.

✔ **Shrink the columns.** On the (Table Tools) Layout tab, click the AutoFit button, and choose AutoFit Contents on the drop-down list to make each column only wide enough to accommodate its widest entry.

✔ **Change the orientation of heading row text.** In a top-heavy table in which the heading row cells contain text and the cells below contain numbers, you can make the entire table narrower by changing the orientation of the text in the heading row. To turn text on its ear, select the cells whose text needs a turn, go to the (Table Tools) Layout tab, and click the Text Direction button. Keep clicking until the text turns the direction you want.

Chances are, if your table can't fit on one page, presenting the information in a table isn't the best option. Try presenting it in bulleted or numbered lists. Or present the information in short paragraphs under small fourth- or fifth-level headings.

	Yes	No	Maybe	Often	Never
Prof. Plum in the Library	3			3	
Miss Scarlet in the Drawing Room		3	3		3
Col. Mustard in the Dining Room	3			3	

Book I, Chapter 5 explains how to create a table, as well as how to include mathematical calculations in Word tables. These pages explain a few table techniques that pertain strictly to Word documents — repeating the heading rows, fitting a table on a single page, and turning a list into a table.

Repeating heading rows on subsequent pages

Making sure that the *heading row,* sometimes called the *header row,* appears on a new page if the table breaks across pages is essential. The heading row

is the first row in the table, the one that usually describes what is in the columns below. Without a heading row, readers can't tell what the information in a table means. Follow these steps to make the heading row (or rows) repeat on the top of each new page that a table appears on:

1. **Place the cursor in the heading row or select the heading rows if your tables includes more than one heading row.**
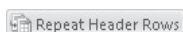
2. **On the (Table Tools) Layout tab, click the Repeat Header Rows button (depending on the size of your screen, you may have to click the Data button first).**

   Heading rows appear only in Print Layout view, so don't worry if you can't see them in Draft view.

Turning a list into a table

In order to turn a list into a table, all components of the list — each name, address, city name, state, and zip code listing, for example — must be separated from the next component by a tab space or a comma. Word looks for tab spaces or commas when it turns a list into a table, and the program separates data into columns according to where the tab spaces or commas are located. You have to prepare your list carefully by entering tab spaces or commas in all the right places before you can turn a list into a table.

Follow these steps to turn a list into a table after you've done all the preliminary work:

1. **Select the list.**

2. **On the Insert tab, click the Table button and choose Convert Text To Table on the drop-down list.**

   You see the Convert Text to Table dialog box.

   Note the number in the Number of Columns box. It should list the number of components into which you separated your list. If the number doesn't match the number of components, you misplaced a tab entry or comma in your list. Click Cancel, return to your list, and examine it to make sure that each line has been divided into the same number of components.

3. **Under Separate Text At, choose the Tabs or Commas option, depending on which you used to separate the components on the list.**

4. **Click OK.**

You can turn a table into a list by clicking the Convert to Text button on the (Table Tools) Layout tab (you may have to click the Data button first, depending on the size of your screen).

Positioning and Wrapping Objects Relative to the Page and Text

"Object" is just Office's generic term for a shape, line, text box, clip-art image, photo, diagram, WordArt image, or chart that you insert in a document. Book I, Chapter 8 explains how to manipulate an object — how to change its size, shape, and other qualities. When you place an object in a Word document, you have to consider more than its size and shape. You also have to consider where to position it on the page and how to wrap text around it. In Word lingo, *wrap* refers to what text does when it butts heads with a shape, text box, photo, diagram, or other object. You must be in Print Layout view to wrap and position objects on a page.
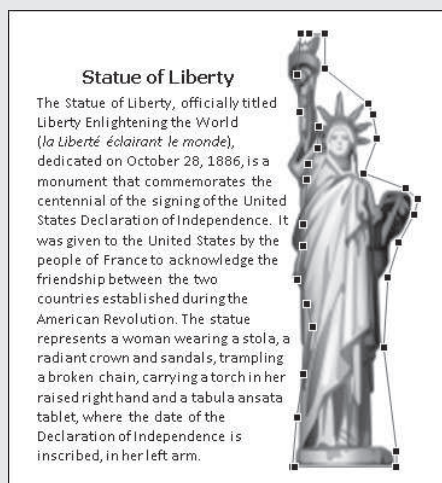
WARNING!

When you insert an object, it lands *inline with text.* That means it lands against the left margin and text doesn't wrap around its side. Before you can change the position of an object, you must select it and choose a text-wrapping option apart from Inline with Text.

Wrapping text with precision

You can decide for yourself how close or far text is from an object when you wrap text. Select the object, and on the Format tab, click the Wrap Text button and choose Edit Wrap Points on the drop-down list. Small black squares called *wrap points* appear around the object. Click and drag the wrap points to push text away from or bring text closer to the object in question.

Statue of Liberty

The Statue of Liberty, officially titled Liberty Enlightening the World (*la Liberté éclairant le monde*), dedicated on October 28, 1886, is a monument that commemorates the centennial of the signing of the United States Declaration of Independence. It was given to the United States by the people of France to acknowledge the friendship between the two countries established during the American Revolution. The statue represents a woman wearing a stola, a radiant crown and sandals, trampling a broken chain, carrying a torch in her raised right hand and a tabula ansata tablet, where the date of the Declaration of Independence is inscribed, in her left arm.

Wrapping text around an object

Figure 4-2 shows the 15 different ways you can wrap text around an object. Select the object you want to wrap text around, go to the Format tab, and use one of these techniques to wrap text around the object:

✦ Click the Wrap Text button and choose an option on the drop-down list. (You may have to click the Arrange button first, depending on the size of your screen.)

✦ Click the Wrap Text button and choose More Layout Options on the drop-down list, or click the Size group button and select the Text Wrapping tab in the Layout dialog box. Then choose a wrapping style and side around which to wrap text. Figure 4-2 shows what the different combinations of Wrapping Style and Wrap Text options do.

Wrapped text looks best when it is justified and hyphenated. That way, text can get closer to the object that is being wrapped.

Figure 4-2: All the ways to wrap text in a Word document.

Positioning an object on a page

To position an object in a Word page, you can drag it to a new location. As Book I, Chapter 8 explains in torturous detail, dragging means to select the object, move the pointer over its perimeter, click when you see the four-headed arrow, and slide the object to a new location.

To make positioning objects on a page a little easier, Word also offers Position commands for moving objects. Select your object, go to the Format

tab, and use one of these techniques to move your object precisely into place:

✦ Click the Position button and select a With Text Wrapping option on the drop-down list, as shown in Figure 4-3. (You may have to click the Arrange button first, depending on the size of your screen.) These options position an object squarely in a corner, a side, or the middle of the page.

✦ Click the Position button and choose More Layout Options on the drop-down list, or click the Size group button and select the Position tab in the Layout dialog box. Then choose position options. Go to the Layout dialog box when you want to place objects in the very same position on different pages.

Select the object   Choose a With Text Wrapping option
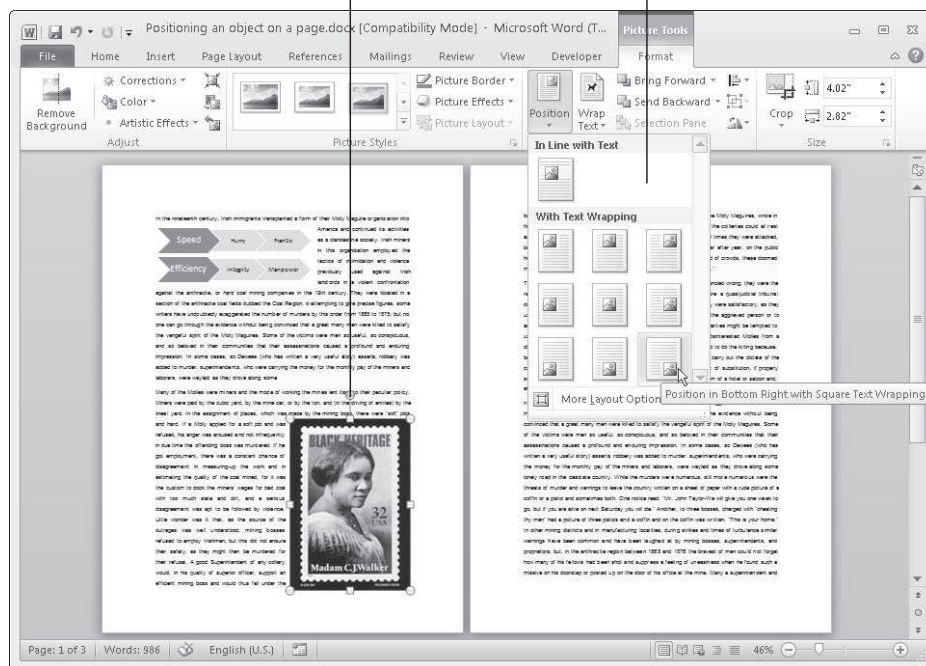
Figure 4-3: The Position options place an object in one part of the page.

An object you position with an option on the Position drop-down list travels from page to page if you move the paragraph to which it's connected. This happens because, when you insert an object, Word attaches it to the paragraph where the cursor is located when you make the insertion. If you move that paragraph to another page or the paragraph gets moved as you edit text, the object moves right along with the paragraph. You can locate the paragraph to which an object is connected by clicking the Show/Hide¶ button on the Home tab and then clicking the object; the anchor symbol appears beside the paragraph that the object is connected to.
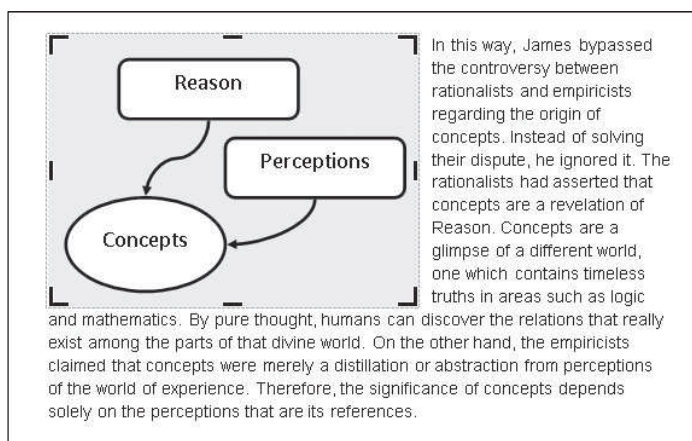
Working with the Drawing Canvas

As Book I, Chapter 8 explains, shapes and lines are a great way to illustrate ideas. You can in effect doodle on the page and give readers another insight into what you want to explain. In Word, however, drawing lines and shapes is problematic unless you draw them on the drawing canvas.

The *drawing canvas* works like a corral to hold lines and shapes. After you create a drawing canvas, you can draw inside it as though you were drawing on a little page, as shown in Figure 4-4. You can treat the drawing canvas as an object in its own right. You can move it, along with the things inside it, to new locations. You can also, by way of the (Drawing Tools) Format tab, give the drawing canvas an outline shape and fill color. The drawing canvas makes working with objects on a page, especially lines and shapes, that much easier.

Figure 4-4:
The drawing canvas — a corral for shapes and lines.

In this way, James bypassed the controversy between rationalists and empiricists regarding the origin of concepts. Instead of solving their dispute, he ignored it. The rationalists had asserted that concepts are a revelation of Reason. Concepts are a glimpse of a different world, one which contains timeless truths in areas such as logic and mathematics. By pure thought, humans can discover the relations that really exist among the parts of that divine world. On the other hand, the empiricists claimed that concepts were merely a distillation or abstraction from perceptions of the world of experience. Therefore, the significance of concepts depends solely on the perceptions that are its references.

Follow these steps to create a drawing canvas for holding lines and shapes:

1. **Place the cursor roughly where you want the drawing canvas to be.**
2. **Go to the Insert tab.**
3. **Click the Shapes button and choose New Drawing Canvas.**

   You can find the New Drawing Canvas command at the bottom of the Shapes drop-down list. A drawing canvas appears on your screen.

REMEMBER

The drawing canvas is an object in its own right. You can wrap text around it, give it an outline, and give it a color fill. You can drag it to a new location. To change its size, drag a handle on the side or corner.

Choosing a Theme for Your Document

When you installed Word on your computer, you also installed a dozen or more themes. A theme is a colorful, ready-made design for headings and text. Each theme imposes a slightly different look on a document. If you want to experiment with themes, more power to you, but be prepared to click the Undo button and backtrack as you rummage around for the right one.

Staring on the Page Layout tab, follow these instructions to experiment with themes:

✦ **Choosing a new theme:** Click the Themes button and choose a theme on the drop-down list.

✦ **Choosing a new set of colors for your theme:** Click the Theme Colors button, slide the pointer over the different color sets on the drop-down list, and see what effect they have on your document.

✦ **Changing the fonts:** Click the Theme Fonts button and choose a combination of fonts on the drop-down list for the headings and text in your document.

✦ **Changing theme effects:** Click the Theme Effects button and choose a theme effect on the drop-down list. A *theme effect* is a slight refinement to a theme.

Putting Newspaper-Style Columns in a Document

Columns look great in newsletters and similar documents. And you can pack a lot of words in columns. I should warn you, however, that the Columns command is only good for creating columns that appear on the same page. Running text to the next page with the Columns command can be problematic. If you're serious about running text in columns, I suggest either constructing the columns from text boxes or using Publisher, another Office program. Book VII explains Publisher.

Sometimes it is easier to create columns by creating a table or by using text boxes, especially when the columns refer to one another. In a two-column résumé, for example, the left-hand column often lists job titles ("Facsimile Engineer") whose descriptions are found directly across the page in the right-hand column ("I Xeroxed stuff all day long"). Creating a two-column résumé with Word's Columns command would be futile because making the columns line up is nearly impossible. Each time you add something to the left-hand column, everything *snakes* — it gets bumped down in the left-hand column and the right-hand column as well.
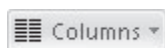
Doing the preliminary work

Before you put text in newspaper-style columns, write it. Take care of the spelling, grammar, and everything else first because making text changes to words after they've been arranged in columns is difficult. Columns appear only in Print Layout view.

Running text into columns

To "columunize" text, select it, go to the Page Layout tab, and click the Columns button. Then either choose how many columns you want on the drop-down list or choose More Columns to create columns of different widths.

You see the Columns dialog box shown in Figure 4-5 if you choose More Columns. Here are the options in the Columns dialog box:

✦ **Preset columns:** Select a Presets box to choose a preset number of columns. Notice that, in some of the boxes, the columns aren't of equal width.

Figure 4-5: Running text in columns.

✦ **Number of columns:** If a preset column doesn't do the trick, enter the number of columns you want in the Number of Columns box.

✦ **Line between columns:** A line between columns is mighty elegant and is difficult to do on your own. Select the Line Between check box to run lines between columns.

✦ **Columns width:** If you deselect the Equal Column Width check box, you can make columns of unequal width. Change the width of each column by using the Width boxes.

✦ **Space between columns:** Enter a measurement in the Spacing boxes to determine how much space appears between columns.

✦ **Start New Column:** This check box is for putting empty space in a column, perhaps to insert a text box or picture. Place the cursor where you want the empty space to begin, choose This Point Forward on the Apply To drop-down list, and select the Start New Column check box.

Word creates a new section if you selected text before you columnized it, and you see your columns in Print Layout view. Chapter 2 of this mini-book explains sections.

TIP

To "break" a column in the middle and move text to the next column, click where you want the column to break and press Ctrl+Shift+Enter or go to the Page Layout tab, click the Breaks button, and choose Column on the drop-down list.

Working with Text Boxes

Put text in a text box when you want a notice or announcement to stand out on the page. Like other objects, text boxes can be shaded, filled with color, and given borders, as the examples in Figure 4-6 demonstrate. You can also lay them over graphics to make for interesting effects. I removed the borders and the fill color from the text box on the right side of Figure 4-6, but rest assured, the text in this figure lies squarely in a text box. (Book I, Chapter 8 explains how to give borders, shading, and color to objects such as text boxes.)

Figure 4-6:
Examples of text boxes.

You can move a text box around at will on the page until it lands in the right place. You can even use text boxes as columns and make text jump from one text box to the next in a document — a nice feature, for example, when you want a newsletter article on page 1 to be continued on page 2. Instead of cutting and pasting text from page 1 to page 2, Word moves the text for you as the column on page 1 fills up.

Inserting a text box

To create a text box, go to the Insert tab, click the Text Box button, and use one of these techniques:

✦ **Choose a ready-made text box**: Scroll in the drop-down list and choose a preformatted text box.

✦ **Draw a conventional text box:** Choose Draw Text Box on the drop-down list, and then click and drag to draw the text box. Lines show you how big it will be when you release the mouse button.

After you insert the text box, you can type text in it and call on all the formatting commands on the (Drawing) Format tab. These commands are explained in Book I, Chapter 8. It also describes how to turn a shape such as a circle or triangle into a text box (create the shape, right-click it, choose Add Text, and start typing).

TIP

Here's a neat trick: You can turn the text in a text box on its side so that it reads from top to bottom or bottom to top, not from left to right. Create a text box, enter the text, go to the (Drawing Tools) Format tab, click the Text Direction button, and choose a Rotate option on the drop-down list.

Making text flow from text box to text box

As I mention earlier, you can link text boxes so that the text in the first box is pushed into the next one when it fills up. To link text boxes, start by creating all the text boxes that you need. You cannot link one text box to another if the second text box already has text in it. Starting on the (Drawing Tools) Format tab, follow these directions to link text boxes:
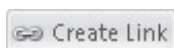
🔗 Create Link

✦ **Creating a forward link:** Click a text box and then click the Create Link button to create a forward link. The pointer changes into a very odd-looking pointer that is supposed to look like a pitcher. Move the odd-looking pointer to the next text box in the chain and click there to create a link.
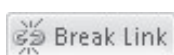
✂ Break Link

✦ **Breaking a link:** To break a link, click the text box that is to be the last in the chain, and then click the Break Link button.

Sprucing Up Your Pages

You can play interior decorator with the pages of a document by putting a border around pages, splashing color on pages, and taking advantage of the predesigned cover pages that Word provides for you. Keep reading if making the pages of your document a little prettier interests you.

Decorating a page with a border

Word offers a means of decorating title pages, certificates, menus, and similar documents with a page border. Besides lines, you can decorate the sides

of a page with stars, pieces of cake, and other artwork. If you want to place a border around a page in the middle of a document, you must create a section break where the page is.

Before you create your border, place the cursor on the page where the border is to appear. Place the cursor on the first page of a document if you want to put a border around only the first page. If your document is divided into sections and you want to put borders around certain pages in a section, place the cursor in the section — either in the first page if you want the borders to go around it, or in a subsequent page.

With the cursor in the right place, follow these steps to decorate your page or pages with a border:

Page Borders

1. **Go to the Page Layout tab and click the Page Borders button.**

   You see the Borders and Shading dialog box, as shown in Figure 4-7.
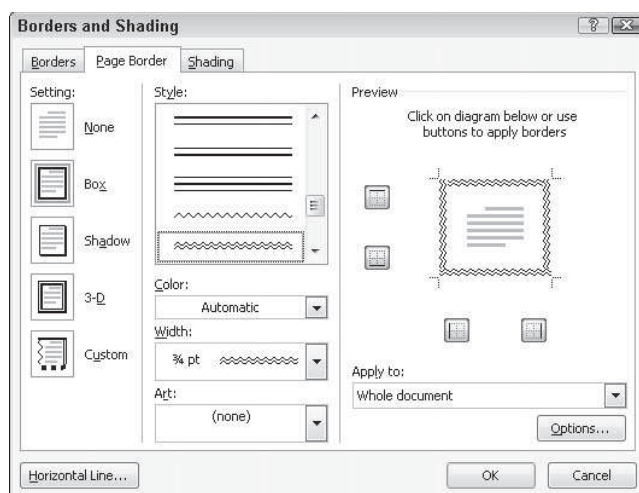
Figure 4-7: Putting borders on pages.

2. **Under Setting, choose which kind of border you want.**

   The Custom setting is for putting borders on one, two, or three sides of the page, not four. Use the None setting to remove borders.

3. **On the Apply To drop-down list, tell Word which page or pages in the document get borders.**

4. **Select options to construct the border you want and then click OK.**

The Page Border tab offers a bunch of tools for fashioning a border:

✦ **Line for borders:** Under Style, scroll down the list and choose a line for the borders. You will find interesting choices at the bottom of the menu. Be sure to look in the Preview window to see what your choices in this dialog box add up to.

✦ **Color for borders:** Open the Color drop-down list and choose a color for the border lines if you want a color border.

✦ **Width of borders:** If you chose artwork for the borders, use the Width drop-down list to tell Word how wide the lines or artwork should be.

✦ **Artwork for borders**: Open the Art drop-down list and choose a symbol, illustration, star, piece of cake, or other artwork, if that is what you want for the borders. You will find some amusing choices on this long list, including ice cream cones, bats, and umbrellas.

✦ **Borders on different sides of the page:** Use the four buttons in the Preview window to tell Word on which sides of the page to draw borders. Click these buttons to remove or add borders, as you want.

✦ **Distance from edge of page:** Click the Options button and fill in the Border and Shading Options dialog box if you want to get specific about how close the borders can come to the edge of the page or pages.

Putting a background color on pages

Especially if you intend to save your Word document as a Web page, you will be glad to know that putting a background color on pages is easy. You can't, however, pick and choose which pages get a background color. Putting background colors on the pages of a document is an all-or-nothing proposition.
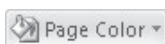
To grace a page with a background color or gradient color mixture, go to the Page Layout tab, click the Page Color button, and choose a color on the drop-down list. Choose Fill Effects to open the Fill Effects dialog box and apply gradient color mixtures or patterns to the pages.

## Getting Word's help with cover letters
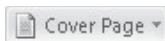
Writing and designing a cover page for a letter or report is a chore. Word can't dictate a cover page for you, but it can provide a handsome preformatted cover page that looks nice at the front of a report or article. To place a cover page at the start of a document, go to the Insert tab, click the Cover Page button, and choose a cover page predesign.

Dropping In a Drop Cap

A *drop cap* is a large capital letter that "drops" into the text, as shown in Figure 4-8. Drop caps appear at the start of chapters in many books, this book included, and you can find other uses for them, too. In Figure 4-8, one drop cap marks the A side of a list of songs on a homemade music CD.

Figure 4-8:
Creating a
drop cap.
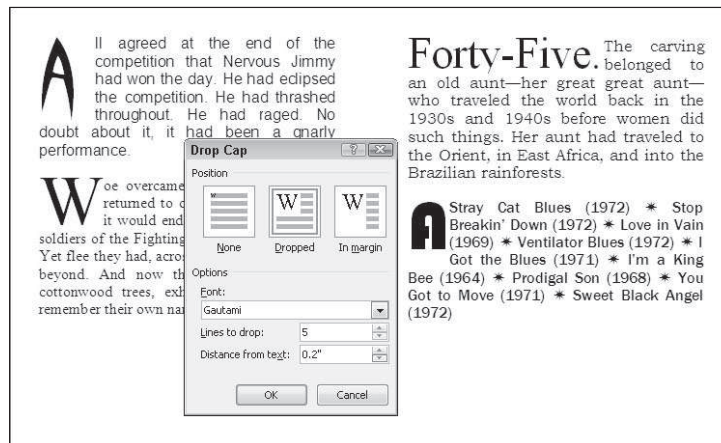
To create a drop cap, start by clicking anywhere in the paragraph whose first letter you want to "drop." If you want to "drop" more than one character at the start of the paragraph, select the characters. Then go to the Insert tab, click the Drop Cap button, and choose Dropped or Drop Cap Options. Choosing Drop Cap Options opens the Drop Cap dialog box shown in Figure 4-8, where you can experiment with these options:

✦ **Position:** Choose which kind of drop cap you want. In Margin places the drop cap to the left of the paragraph, in the margin, not in the paragraph itself.

✦ **Font:** Choose a font from the Font drop-down list. Choose a different font from the text in the paragraph.

✦ **Lines to Drop:** Enter the number of text lines to drop the letter.

✦ **Distance from Text:** Keep the 0 setting unless you're dropping an *I, 1,* or other skinny letter or number.

Click the Drop Cap button and choose None to remove a drop cap.

Watermarking for the Elegant Effect

A *watermark* is a pale image or set of words that appears behind text on each page in a document. True watermarks are made in the paper mold and can be seen only when the sheet of paper is held up to a light. You can't make true watermarks with Word, but you can make the closest thing to them that can be attained in the debased digital world in which we live. Figure 4-9 shows two pages of a letter in which the paper has been "watermarked." Watermarks are one of the easiest formatting tricks to accomplish in Word.

Figure 4-9: Watermarks showing faintly on the page.
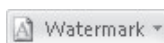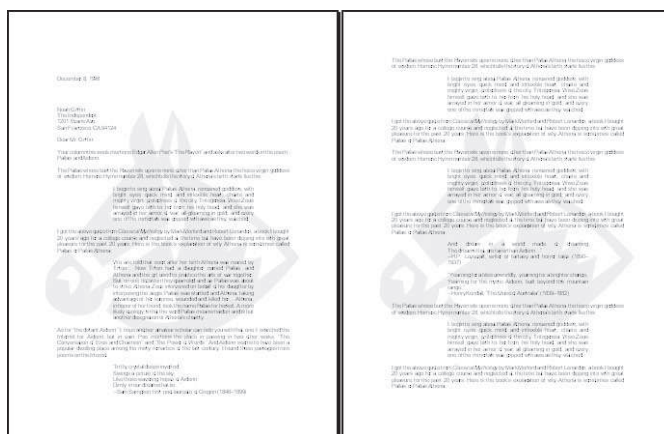
To create a watermark for every page of a document, go to the Page Layout tab and click the Watermark button. From the drop-down list, create your watermark:

✦ **Prefabricated text watermark**: Scroll down the list and choose an option. You will find "Confidential," "Urgent," and other text watermarks.

✦ **Picture watermark:** Choose Custom Watermark, and in the Printed Watermark dialog box, click the Picture Watermark option button. Then click the Select Picture button. In the Insert Picture dialog box, select a graphic file to use for the watermark and click the Insert button. Back in the Printed Watermark dialog box, choose or enter a size for the graphic on the Scale drop-down list. I don't recommend deselecting the Washout check box — do so and your image may be so dark that it obscures the text.

✦ **Text watermark:** Choose Custom Watermark and, in the Printed Watermark dialog box, click the Text Watermark option button. Type a word or two in the Text box (or choose an entry from the drop-down list). Choose a font, size, color, and layout for the words. If you deselect the Semitransparent check box, you do so at your peril because the watermark words may be too dark on the page.

To tinker with a watermark, reopen the Printed Watermark dialog box. To remove a watermark, click the Watermark button and choose Remove Watermark on the drop-down list.

Landscape Documents

A *landscape* document is one in which the page is wider than it is long, like a painting of a landscape, as shown on the right side of Figure 4-10. Most documents, like the pages of this book, are printed in *portrait* style, with the short sides of the page on the top and bottom. However, creating a landscape document is sometimes a good idea because a landscape document stands out from the usual crowd of portrait documents and sometimes printing in landscape mode is necessary to fit text, tables, and graphics on a single page.

Figure 4-10: A portrait document (left) and landscape document (right).
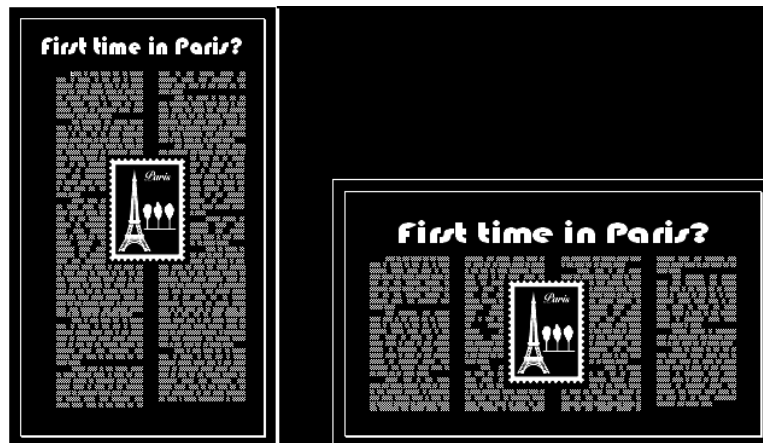
You're ready to go if you want to turn all the pages in your document into landscape pages. To turn some of the pages into landscape pages, create a section for the pages that need to appear in Landscape mode and click in the section (Chapter 2 of this mini-book explains sections). Starting on the Page Layout tab, use these techniques to change the page orientation:
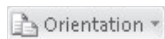
✦ **Landscape pages:** Click the Orientation button and choose Landscape on the drop-down list.

✦ **Portrait pages:** Click the Orientation button and choose Portrait on the drop-down list.

Printing on Different Sizes of Paper

You don't have to print exclusively on standard 8.5-x-11 paper; you can print on legal-size paper and other sizes of paper as well. A newsletter with an

unusual shape really stands out in a crowd and gets people's attention. Go to the Page Layout tab and use one of these techniques to change the size of the paper on which you intend to print a document:

✦ Click the Size button and choose an option on the drop-down list.

✦ Click the Page Setup group button, select the Paper tab in the Page Setup dialog box, and choose a setting on the Paper Size drop-down list. If none of the settings suits you, enter your own settings in the Width and Height text boxes.

Chapter 5: Getting Word's Help with Office Chores

*T*his chapter is dedicated to the proposition that everyone should get their work done sooner. It explains how Word can be a help in the office, especially when it comes to working on team projects. This chapter explains comments, using revision marks to record edits, and mail merging, which is Microsoft's term for generating form letters, labels, and envelopes for mass mailings.

Highlighting Parts of a Document

In my work, I often use the Highlight command to mark paragraphs and text that need reviewing later. And on rainy days, I use it to splash color on my documents and keep myself amused. Whatever your reasons for highlighting text in a document, go to the Home tab and use one of these techniques to do it:

✦ **Select text and then choose a highlighter:** Select the text you want to highlight and then either click the Text Highlight Color button (if it's displaying your color choice) or open the drop-down list on the button and choose a color.

✦ **Choose a highlighter and then select text:** Either click the Text Highlight Color button (if it's already displaying your color choice) or open the drop-down list on the button and choose a color. The pointer changes into a crayon. Drag across the text you want to highlight. When you finish highlighting, click the Text Highlight Color button again or press Esc.

To remove highlights, select the highlighted text, open the drop-down list on the Text Highlight Color button, and choose No Color. Select the entire document (press Ctrl+A) and choose No Color to remove all highlights from a document.

Highlight marks are printed along with the text. To keep highlights from being printed, go to the File tab, choose Options, click the Display category in the Word Options dialog box, and deselect the Show Highlighter Marks check box.

Commenting on a Document

In the old days, comments were scribbled illegibly in the margins of books and documents, but in Word, comments are easy to read. To show where a comment has been made on the text, Word puts brackets around text and highlights the text. Each commenter is assigned a different highlighting color so that you can tell at a glance who made each comment. As shown in Figure 5-1, you can read comments in the Reviewing pane, in pop-up boxes (in Draft view and Outline view), and in balloons (in Print Layout view and Web Layout view).

Figure 5-1: Comments appear in (left to right) the Reviewing pane, pop-up boxes, and balloons.
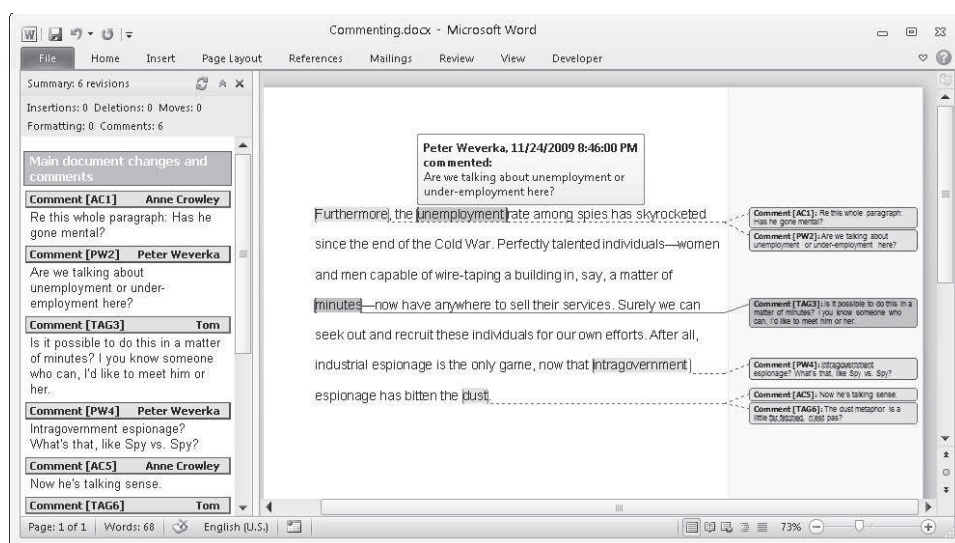
Entering a comment

If you're putting together a proposal, you can pass it around the office and invite everyone to comment. If someone makes an especially good comment, you can include it in the main text merely by copying and pasting it. To write a comment:

1. **Select the word or sentence that you want to comment on.**

2. **On the Review tab, click the New Comment button.**

In Draft and Outline view, the Reviewing pane opens on the left side or bottom of the screen so that you can enter a comment; in Print Layout and Web Layout view, a new balloon appears on the right side of the

screen so that you can enter a comment. (On the Review tab, open the drop-down list on the Reviewing Pane button and choose an option to place the pane on the left side or bottom of the screen.)

3. **Type your comment in the space provided.**

In Draft and Outline view, commenters' names and initials appear beside each comment and comments are numbered. If the wrong name and initials appear beside your comments, open the drop-down list on the Track Changes button, choose Change User Name, and enter your correct name and initials in the Word Options dialog box.

Caring for and feeding comments

Starting on the Review tab, here is a handful of tasks that deserve comment (if you'll pardon my little pun):
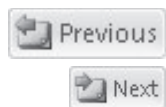
✦ **Editing a comment:** Right-click between the brackets and choose Edit Comment or just click in the Reviewing pane in Print Layout view. Then rewrite the comment in the Reviewing pane or the balloon.

✦ **Going from comment to comment:** Click the Previous or Next button on the Review tab. In Draft and Outline view, the Reviewing pane opens, and you can read the comment you landed on at the top of the pane. In Print Layout and Web Layout view, balloons on the right side of the screen are highlighted as you go from comment to comment.

✦ **Seeing and hiding the Reviewing pane:** Click the Reviewing Pane button to display or hide the Reviewing pane. On the button's drop-down list, choose an option to put the pane on the left side or bottom of the screen.

✦ **Temporarily removing the comments:** Click the Show Markup button and deselect Comments on the drop-down list to wipe away the comments; select Comments to see them again.

✦ **Displaying comments by a particular reviewer:** Click the Show Markup button, choose Reviewers, and deselect All Reviewers on the submenu. Then click the button again, choose Reviewers, and choose the name of a reviewer. To see all comments again, click the Show Markup button and choose Reviewers⇨All Reviewers.

✦ **Deleting a comment:** Click a comment in the Reviewing pane, click between brackets, or click a comment balloon and then click the Delete button. You can also right-click and choose Delete Comment.

✦ **Deleting all the comments in the document:** Open the drop-down list on the Delete button and choose Delete All Comments in Document.

✦ **Deleting comments made by one or two people:** First, isolate comments made by people whose comments you want to delete (see "Displaying comments by a particular reviewer" earlier in this list). Then open the drop-down list on the Delete button and choose Delete All Comments Shown.

Letting the air out of the balloons

In Print Layout and Web Layout view, comments and revisions appear in balloons on the right side of the screen. Sometimes seeing revisions and comments in balloons is helpful; sometimes it's hard to make sense of them when they're so far to the side of the page.

To hide or display balloons in Print Layout and Web Layout view, you can click the Show Markup button on the Review tab, choose Balloons, and choose an option on the submenu:

✔ Show Revisions in Balloons displays the balloons.

✔ Show All Revisions Inline moves comments and revisions onto the page and effectively lets all the air out of the balloons.

✔ Show Only Comments and Formatting in Balloons shows comments only, not revision marks.
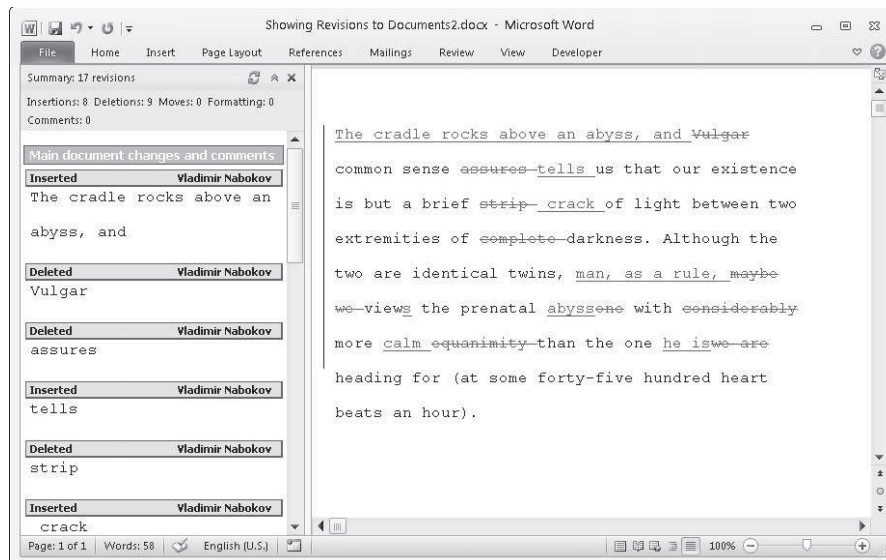

Tracking Changes to Documents

When many hands go into revising a document, figuring out who made changes to what is impossible. What's more, it's impossible to tell what the first draft looked like. Sometimes it's hard to tell whether the changes were for good or ill. To help you keep track of changes to documents, Word offers the Track Changes command. When this command is in effect:

✦ All changes to a document are recorded in a different color, with one color for each reviewer.

✦ In Draft and Outline view, new text is underlined and deleted text is crossed out.

✦ In Print Layout and Web Layout view, new text is underlined, and deleted text appears in balloons on the right side of the window.

✦ In all views, a vertical line appears on the left side of the screen to indicate where changes were made.

By moving the pointer over a change, you can read the name of the person who made it as well as the words that were inserted or deleted. You can see changes as well in the Reviewing pane. As you review changes, you can accept or reject each change. You can also see the original document, a copy with revisions, or the final copy simply by making a choice from the Display for Review drop-down list on the Review tab.

To give you an idea of what tracking marks look like, Figure 5-2 shows the first two sentences of Vladimir Nabokov's autobiography *Speak, Memory* in Draft view, with marks showing where additions were made and deletions scratched out.

Figure 5-2:
A document in Draft view with change marks and changes showing.

Telling Word to start marking changes

To start tracking where editorial changes are made to a document, turn Track Changes on. You can do that with one of these techniques:

✦ On the Review tab, click the Track Changes button (or open its drop-down list and choose Track Changes).

✦ Press Ctrl+Shift+E.

✦ On the status bar, click the words *Track Changes* so that the status bar reads "Track Changes: On." If you don't see the words *Track Changes* on your status bar and you want to see them there, right-click the status bar and select Track Changes on the pop-up menu.

To stop tracking changes to a document, click the Track Changes button again, press Ctrl+Shift+E again, or click the words *Track Changes* on the status bar so that the words read "Track Changes: Off."

Telling Word how to mark changes

To tell Word precisely how to mark changes, open the drop-down list on the Track Changes button (you may have to click the Tracking button first) and choose Change Tracking Options. You see the colorful Track Changes Options dialog box. It offers these options:

✦ **Markup options:** Declare how you want to mark insertions and deletions, and with which color you want to mark them.

✦ **Moves options:** Declare how you want to mark text that has been cut and pasted.

✦ **Table Cell Highlighting options:** When editing tables, you can mark inserted, deleted, merged, and split cells in different colors.

✦ **Formatting options:** Choose an option to mark formatting changes as well as changes to text.

✦ **Balloons:** Choose Always if you prefer to mark deleted text with balloons to the right of the text in Print Layout and Web Layout view. If you prefer not to see balloons in Print Layout and Web Layout view, choose Never. You must display the balloons to examine revised documents in Final Showing Markup and Original Showing Markup view (see "Marking changes when you forgot to turn on change marks" later in this chapter). Earlier in this chapter, the sidebar "Letting the air out of the balloons" explains how you can quickly hide or display balloons in Print Layout and Web Layout view.

TIP If your name doesn't appear with the change marks you make, go to the Review tab, open the drop-down list on the Track Changes button, choose Change User Name, and enter your name and initials in the Word Options dialog box.

Reading and reviewing a document with change marks

Reading and reviewing a document with change marks isn't easy. The marks can get in the way. Fortunately, Word offers the Display for Review menu on the Review tab for dealing with documents that have been scarred by change marks. Choose options on the Display for Review drop-down list to get a better idea of how your changes are taking shape:

✦ **See more clearly where text was deleted from the original document:** Choose Final: Show Markup. In Print Layout view, deleted material appears in balloons on the right side of the screen and insertions are underlined.

✦ **See what the document would look like if you accepted all changes:** Choose Final. All change marks are stripped away and you see what your document would look like if you accepted all changes made to it.

✦ **See more clearly where text was inserted in the document:** Choose Original: Show Markup. In Print Layout view, insertions appear in balloons on the right side of the screen and a line appears through text that has been deleted.

✦ **See what the document would look like if you rejected all changes:** Choose Original. You get the original, pristine document back.

Marking changes when you forgot to turn on change marks

Suppose that you write the first draft of a document and someone revises it but that someone doesn't track changes. How can you tell where changes were made? For that matter, suppose that you get hold of a document, you change it around without tracking changes, and now you want to see what your editorial changes did to the original copy. I have good news: You can compare documents to see the editorial changes that were made to them. Word offers a command for comparing the original document to a revised edition and another for comparing two different revised editions of the same document.

After you make the comparison, Word creates a third document similar to the one shown in Figure 5-3. In the Source Document pane on the right side of the window, you can see the documents you're comparing. The Compared Document pane, meanwhile, shows who made changes and what those changes are.

Follow these steps to compare an original document to its revised copy or two revised copies:

1. **On the Review tab, click the Compare button.**

   You see a drop-down list (depending on the size of your screen, you may have to choose Compare more than once to get to the drop-down list).

2. **On the drop-down list, choose Compare to compare the original document to its revised edition; choose Combine to compare two editions of the same document that were revised separately.**

   You see the Compare Documents dialog box or the Combine Documents dialog box, as shown in Figure 5-4. These dialog boxes work the same way.

Figure 5-3: Comparing documents to see editorial changes.
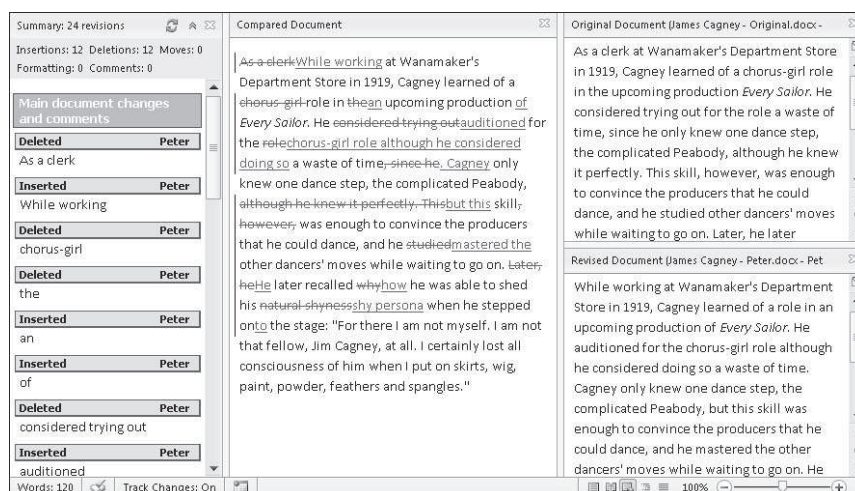
Figure 5-4:
Choosing
which
documents
to compare.
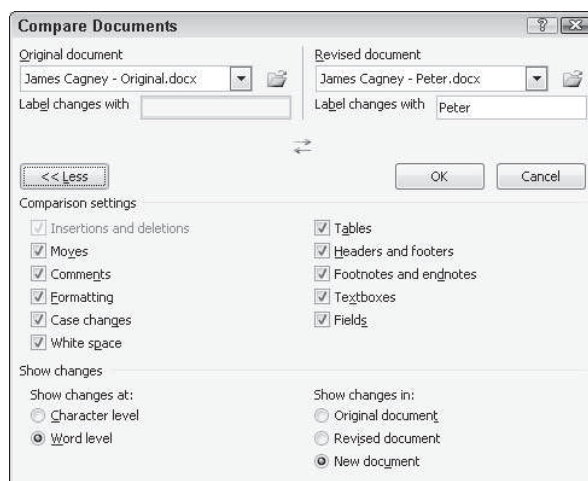
3. **On the Original Document drop-down list, choose the original or a revised edition of the document; if its name isn't there, click the Browse button and select it in the Open dialog box.**

4. **On the Revised Document drop-down list, choose a revised copy, or else click the Browse button and select it in the Open dialog box.**

5. **Click the More button.**

   You see more options for comparing or combining documents.

6. **If you so desire, deselect the Comparison Settings check boxes to tell Word what you want to compare.**

7. **Click OK.**

   Word creates a new document that shows where changes were made to the original copy or where the revised copies differ (refer to Figure 5-3). You can save this document if you want to.

TIP

To help with document comparisons, you can tell Word what to display in the Source Documents pane on the right side of the screen. On the Review tab, click the Compare button, choose Show Source Documents, and choose an option on the submenu. You can hide the source documents, show the original document, show the revised edition, or show both editions.

Accepting and rejecting changes to a document

TIP

Word gives you the chance to accept or reject changes one at a time, but in my considerable experience with changes (I am a sometime editor), I find that the best way to handle changes is to go through the document, reject the changes you don't care for, and when you have finished reviewing, accept all the remaining changes. That way, reviewing changes is only half as tedious.
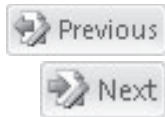
Previous

Next

Whatever your preference for accepting or rejecting changes, start by select-ing a change. To do so, either click it or click the Previous or Next button on the Review tab to locate it in your document. With the change selected, do one of the following:

Accept

✦ **Accept a change:** Click the Accept button or open the drop-down list on the Accept button and choose Accept Change or Accept and Move to Next. You can also right-click and choose Accept.

Reject

✦ **Reject a change:** Click the Reject button or open the drop-down list on the Reject button and choose Reject Change or Reject and Move to Next. You can also right-click and choose Reject.

✦ **Accept all changes:** Open the drop-down list on the Accept button and choose Accept All Changes in Document.

✦ **Reject all changes:** Open the drop-down list on the Reject button and choose Reject All Changes in Document.

TIP

By way of the Accept and Reject buttons, you can also accept or reject all changes made by a single reviewer. First, isolate the reviewer's changes by clicking the Show Markup button, choosing Reviewers, and selecting a reviewer's name. Then open the drop-down list on the Accept or Reject button, and choose Accept All Changes Shown or Reject All Changes Shown.

Printing an Address on an Envelope

Printing addresses gives correspondence a formal, official look. It makes you look like a big shot. (Later in this chapter, "Churning Out Letters, Labels, and Envelopes for Mass Mailings" explains how to print more than one envelope at a time). Here's how to print an address and a return address on an envelope:

1. **To save a bit of time, open the document that holds the letter you want to send; then select the name and address of the person you want to send the letter to.**

By doing so, you save yourself from having to type the address. However, you don't have to open a document to start with.
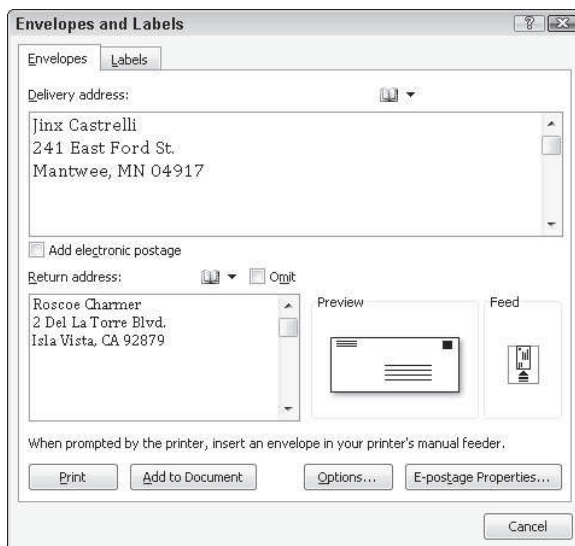
Envelopes

2. **On the Mailings tab, click the Envelopes button (you may have to click the Create button first, depending on the size of your screen).**

The Envelopes tab of the Envelopes and Labels dialog box appears, as shown in Figure 5-5.

3. **Enter a name and address in the Delivery Address box (the address is already there if you selected it in Step 1).**

4. **Enter your return address in the Return Address box, if you want.**

5. **Click the Omit check box if you don't want your return address to appear on the envelope.**

6. **Click the Options button, and in the Envelope Options dialog box, tell Word what size your envelopes are and how your printer handles envelopes.**

   Tell Word about your envelopes on the Envelope Options and Printing Options tabs, and click OK:

   • *Envelope Options tab:* Choose an envelope size, a font for printing the delivery and return address, and a position for the addresses. The sample envelope in the Preview shows you what your position settings do when the envelope is printed.

   • *Printing Options tab:* Choose a technique for feeding envelopes to your printer. Consult the manual that came with your printer, select one of the Feed Method boxes, click the Face Up or Face Down option button, and open the Feed From drop-down list to tell Word which printer tray the envelope is in or how you intend to stick the envelope in your printer.

7. **Click the Print button.**

   All that trouble just to print an address on an envelope!

# Printing a Single Address Label (Or a Page of the Same Label)

If you need to print a single label or a sheet of labels that are all the same, you can do it. Before you start printing, however, take note of the label's Avery stock number, what size the label is, and its brand name. You are asked about label brands and sizes when you print labels. (Later in this chapter, "Churning Out Letters, Labels, and Envelopes for Mass Mailings" explains how to print multiple labels as part of a mass mailing.)

Follow these steps to print a single label or a sheet full of identical labels:

1. **On the Mailings tab, click the Labels button (you may have to click the Create button first, depending on the size of your screen).**

You see the Labels tab of the Envelopes and Labels dialog box, as shown in Figure 5-6.
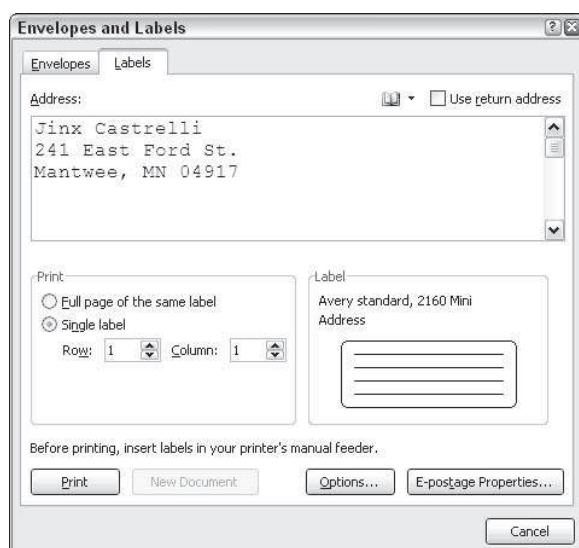
Figure 5-6: Printing labels.

2. **Enter the label — the name and address — in the Address box.**

3. **Either click the Options button or click the label icon in the Label box to open the Label Options dialog box.**

4. **In the Printer Information area, select either Continuous-Feed Printers or Page Printers to declare which kind of printer you have; on the Tray drop-down list, choose the option that describes how you will feed labels to your printer.**

5. **Open the Label Vendors drop-down list and choose the brand or type of labels that you have.**

   If your brand is not on the list, click the Details button, and describe your labels in the extremely confusing Information dialog box. A better way, however, is to measure your labels and see whether you can find a label of the same size by experimenting with Product Number and Label Information combinations.

6. **In the Product Number menu, select the product number listed on the box that your labels came in.**

   Look in the Label Information box on the right to make sure that the Height, Width, and Page Size measurements match those of the labels you have.

7. **Click OK to return to the Envelopes and Labels dialog box.**

8. **Choose a Print option.**

   Tell Word to print a single label or a sheet full of labels:

   - *Full Page of the Same Label:* Select this option button if you want to print a pageful of the same label. Likely, you'd choose this option to print a pageful of your own return addresses. Click the New Document button after you make this choice. Word creates a new document with a pageful of labels. Save and print this document on a sheet of labels.

   - *Single Label:* Select this option button to print one label. Then enter the row and column where the label is located and click the Print button.

Churning Out Letters, Envelopes, and Labels for Mass Mailings

Thanks to the miracle of computing, you can churn out form letters, labels, and envelopes for a mass mailing in the privacy of your home or office, just as the big companies do. Churning out form letters, envelopes, and labels is easy, as long as you take the time to prepare the source file. The *source file* is the file that the names and addresses come from. A Word table, an Excel worksheet, a Microsoft Access database table or query, or an Outlook Contacts list or Address Book can serve as the source file. (Book III explains Outlook; Book V explains Excel; Book VI explains Access.)

To generate form letters, envelopes, or labels, you merge the form letter, envelope, or label document with a source file. Word calls this process *merging.* During the merge, names and addresses from the source file are plugged into the appropriate places in the form letter, envelope, or label document. When the merge is complete, you can either save the form letters, envelopes, or labels in a new file or start printing right away.

The following pages explain how to prepare the source file and merge addresses from the source file with a document to create form letters, labels, or envelopes. Then you discover how to print the form letters, labels, or envelopes after you have generated them.

TIP

Word offers a mail-merge wizard (*wizard* is Microsoft's name for a step-by-step procedure you can follow to accomplish a task). If you want to try your hand at using the wizard to complete a mail merge, go to the Mailings tab, click the Start Mail Merge button, and choose Step by Step Mail Merge Wizard on the drop-down list. Good luck to you!

Preparing the source file

If you intend to get addresses for your form letters, labels, or envelopes from an Outlook Contact List or Address Book on your computer, you're ready to go. However, if you haven't entered the addresses yet or you are keeping them in a Word table, Excel worksheet, Access database table, or Access query, make sure that the data is in good working order:

✦ **Word table:** Save the table in its own file and enter a descriptive heading at the top of each column. In the merge, when you tell Word where to plug in address and other data, you will do so by choosing a heading name from the top of a column. In Figure 5-7, for example, the column headings are Last Name, First Name, Street, and so on. (Book I, Chapter 5 explains how to construct a Word table.)

Figure 5-7: A Word source table for a mail merge.

Last Name	First Name	Street	City	State	ZIP	Birthday
Creed	Hank	443 Oak St.	Atherton	CA	93874	July 31
Daws	Leon	13 Spruce St.	Colma	CA	94044	April 1
Maves	Carlos	11 Guy St.	Reek	NV	89201	February 28
Ng	Winston	1444 Unger Ave.	Colma	CA	94404	November 12
Smith	Jane	121 First St.	Colma	CA	94044	January 10
Weiss	Shirley	441 Second St.	Poltroon	ID	49301	May 4

✦ **Excel worksheet:** Arrange the worksheet in table format with a descriptive heading atop each column and no blank cells in any columns. Word will plug in address and other data by choosing heading names.

✦ **Access database table or query:** Make sure that you know the field names in the database table or query where you keep the addresses. During the merge, you will be asked for field names. By the way, if you're comfortable in Access, query a database table for the records you will need. As you find out shortly, Word offers a technique for choosing only the records you want for your form letters, labels, or envelopes. However, by querying first in Access, you can start off with the records you need and spare yourself from having to choose records in Word.

A Word table, Excel worksheet, or Access table or query can include more than address information. Don't worry about deleting information that isn't required for your form letters, labels, and envelopes. As you find out soon, you get to decide which information to include from the Word table, Excel worksheet, or Access table or query.

Merging the document with the source file

After you prepare the source file, the next step in generating form letters, labels, or envelopes for a mass mailing is to merge the document with the source file. Follow these general steps to do so:

1. **Create or open a document.**

   - *Form letters:* Either create a new document and write your form letter, being careful to leave out the parts of the letter that differ from recipient to recipient, or open a letter you have already written and delete the addressee's name, the address, and other parts of the letter that are particular to each recipient.

   - *Envelopes:* Create a new document.

   - *Labels:* Create a new document.

2. **On the Mailings tab, click the Start Mail Merge button.**

3. **Choose Letters, Envelopes, or Labels on the drop-down list.**

4. **Prepare the groundwork for creating form letters, envelopes, or labels for a mass mailing.**

   What you do next depends on what kind of mass mailing you want to attempt:

   - *Form letters:* You're ready to go. The text of your form letter already appears on-screen if you followed the directions for creating and writing it in Step 1.

   - *Envelopes:* You see the Envelope Options dialog box, where, on the Envelope Options and Printing Options tabs, you tell Word what size envelope you will print on. See "Printing an Address on an Envelope," earlier in this chapter, for instructions about filling out these tabs (see Step 6). A sample envelope appears on-screen.

   - *Labels:* You see the Label Options dialog box, where you tell Word what size labels to print on. See "Printing a Single Address Label (or a Page of the Same Label)" earlier in this chapter, if you need advice for filling out this dialog box (refer to Steps 4 through 7).

5. **Click the Select Recipients button and choose an option on the drop-down list to direct Word to your source file or the source of your address and data information.**

Earlier in this chapter, "Preparing the source file" explains what a source file is. Your options are as follows:

- *Addresses from a Word table, Excel worksheet, Access database table, or Access query:* Choose Use Existing List. You see the Select Data Source dialog box. Locate the Word file, the Excel worksheet, or the Access database, select it, and click Open.

  If you select an Excel worksheet or Access database, you see the Select Table dialog box. Select the worksheet, table, or query you want and click the OK button.

- *Addresses from Microsoft Outlook:* Choose Select from Outlook Contacts (Outlook must be your default e-mail program to get addresses from Outlook). Then, in the Select Contact dialog box, choose Contacts and click OK.
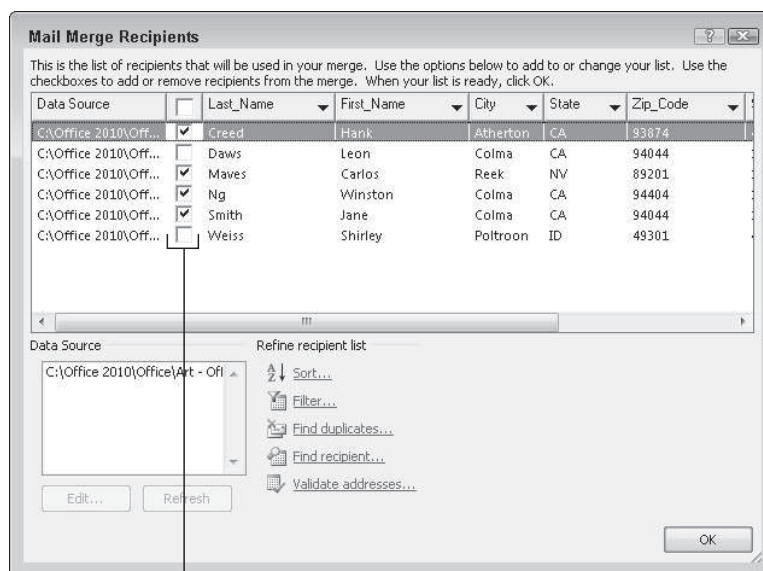
6. **Click the Edit Recipient List button.**

    The Mail Merge Recipients dialog box appears, as shown in Figure 5-8.

7. **In the Mail Merge Recipients dialog box, select the names of people to whom you will send mail; then click OK.**

    To select recipients' names, check or uncheck the boxes on the left side of the dialog box.

Figure 5-8:
Choosing who gets mail.


Choose the names of recipients

8. **Enter the address block on your form letters, envelopes, or labels.**

   The *address block* is the address, including the recipient's name, company, title, street address, city, and ZIP Code. If you're creating form letters, click in the sample letter where the address block will go. If you're printing on envelopes, click in the middle of the envelope where the delivery address will go. Then follow these steps to enter the address block:

   a. Click the Address Block button. The Insert Address Block dialog box appears, as shown in Figure 5-9.

Figure 5-9: Creating the address block (left) and linking it with address fields (right).
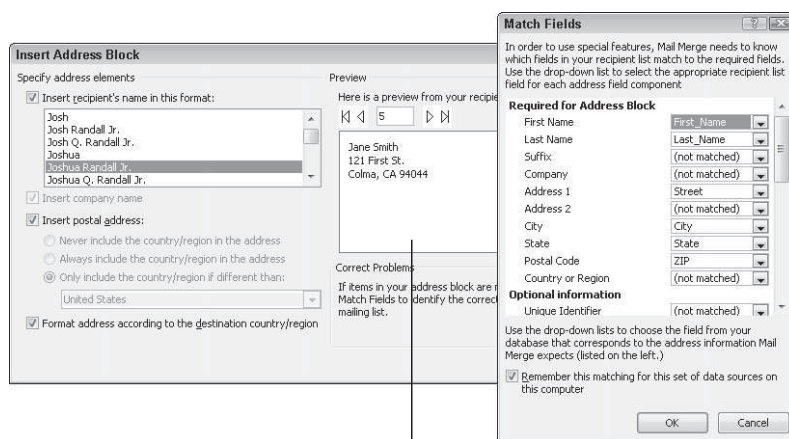
Address block

   b. Choose a format for entering the recipient's name in the address block. As you do so, watch the Preview window; it shows the actual names and addresses that you selected in Step 7.

   c. Click the Match Fields button. You see the Match Fields dialog box, shown in Figure 5-9.

   d. Using the drop-down lists on the right side of the dialog box, match the fields in your source file with the address block fields on the left side of the dialog box. In Figure 5-9, for example, the Street field is the equivalent of the Address 1 field on the left side of the dialog box, so Street is chosen from the drop-down list to match Address 1.

   e. Click OK in the Match Fields dialog box and the Insert Address Block dialog box. The <<AddressBlock>> field appears in the document where the address will go. Later, when you merge your document with the data source, real data will appear where the field is now. Think of a field as a kind of placeholder for data.

9. **Click the Preview Results button on the Mailings tab to see real data rather than fields.**

Now you can see clearly whether you entered the address block correctly. If you didn't enter it correctly, click the Match Fields button (it's in the Write & Insert Fields group) to open the Match Fields dialog box and make new choices.

10. **Put the finishing touches on your form letters, labels, or envelopes:**

- *Form letters:* Click where the salutation ("Dear John") will go and then click the Greeting Line button. You see the Insert Greeting Line dialog box, as shown in Figure 5-10. Make choices in this dialog box to determine how the letters' salutations will read.
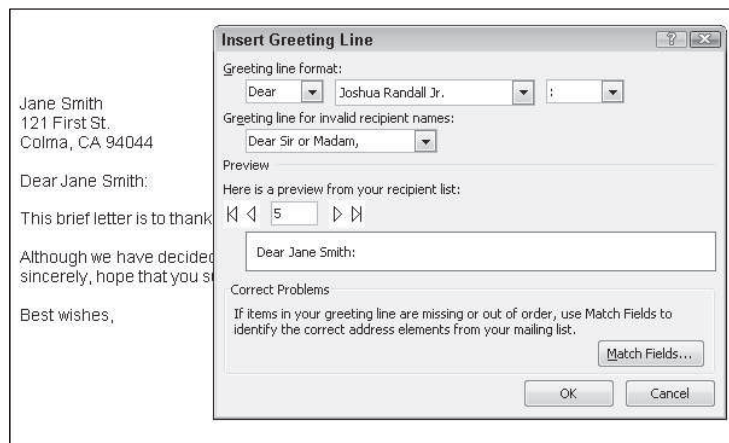
Figure 5-10: Entering the greeting.

The body of your form letter may well include other variable information such as names and birthdays. To enter that stuff, click in your letter where variable information goes and then click the Insert Merge Field button. The Insert Merge Field dialog box appears and lists fields from the source file. Select a field, click the Insert button, and click the Close button. (You can also open the drop-down list on the Insert Merge Field button and choose a field from the source file.)

If you are editing your form letter and you need to see precisely where the variable information you entered is located, click the Highlight Merge Fields button. The variable information is highlighted in your document.

- *Envelopes:* To position the address block correctly, you may have to press the Enter key and tab key to move it to the center of envelope. If you don't like the fonts or font sizes on the envelope, select an address, go to the Home tab, and change fonts and font sizes there.

  To enter a return address, click in the upper-left corner of the envelope and enter it there.

- *Labels:* Click the Update Labels button to enter all recipients' labels in the sample document.

11. **Click the Next Record and Previous Record buttons on the Mailings tab to skip from recipient to recipient and make sure that you have entered information correctly.**

    These buttons are located in the Preview Results group. The items you see on-screen are the same form letters, envelopes, or labels you will see when you have finished printing. (Click the Preview Results button if you see field names rather than people's names and addresses).

If an item is incorrect, open the source file and correct it there. When you save the source file, the correction is made in the sample document.

At last — you're ready to print the form letters, envelopes, or labels. Better keep reading.

Printing form letters, envelopes, and labels

After you have gone to the trouble to prepare the data file and merge it with the document, you're ready to print your form letters, envelopes, or labels. Start by loading paper, envelopes, or sheets of labels in your printer:

✦ **Form letters:** Form letters are easiest to print. Just put the paper in the printer.

✦ **Envelopes:** Not all printers are capable of printing envelopes one after the other. Sorry, but you probably have to consult the dreary manual that came with your printer to find out the correct way to load envelopes.

✦ **Labels:** Load the label sheets in your printer.

Now, to print the form letters, envelopes, or labels, save the material in a new document or send it straight to the printer:

✦ **Saving in a new document:** Click the Finish & Merge button and choose Edit Individual Documents (or press Alt+Shift+N). You see the Merge to New Document dialog box. Click OK. After Word creates the document, save it and print it. You can go into the document and make changes here and there before printing. In form letters, for example, you can write a sentence or two in different letters to personalize them.

✦ **Printing right away:** Click the Finish & Merge button and choose Print Documents (or press Alt+Shift+M) to print the form letters, envelopes, or labels without saving them in a document. Click OK in the Merge to Printer dialog box and then negotiate the Print dialog box.

Save the form letters, labels, or envelopes in a new document if you intend to print them at a future date or ink is running low on your printer and you may have to print in two or more batches. Saving in a new document permits you to generate the mass mailing without having to start all over again with the merge process and all its tedium.

Chapter 6: Tools for Reports and Scholarly Papers

In This Chapter

✔ Putting a list in alphabetical order

✔ Working in Outline view

✔ Creating a table of contents

✔ Indexing and cross-referencing your work

✔ Managing footnotes and endnotes

✔ Putting together a bibliography

*T*his chapter is hereby dedicated to everyone who has had to delve into the unknown and write a report about it. Writing reports, manuals, and scholarly papers is not easy. You have to explore uncharted territory. You have to contemplate the ineffable. And you have to write bibliographies and footnotes and maybe an index, too. Word cannot take you directly to uncharted territory, but it can take some of the sting out of it.

This chapter explains how to handle footnotes and endnotes, generate a table of contents, index a document, include cross-references in documents, and stitch together a bibliography.

Alphabetizing a List

Which comes first in an alphabetical list, "San Jose, California" or "San José, Costa Rica"? You could research the matter on your own, delving into various dictionaries and online references, or you could rely on the Sort button for the answer. Follow these steps to quickly alphabetize a list:

1. **Select the list.**

2. **On the Home page, click the Sort button.**

You see the Sort Text dialog box. The Then By options are for sorting tables; they don't concern you, because you're sorting a list.

3. **Click OK.**

That was easy.

Outlines for Organizing Your Work

Outline view is a great way to see at a glance how your document is organized and whether you need to organize it differently. To take advantage of this feature, you must have assigned heading styles to the headings in your document (Chapter 3 of this mini-book explains styles). In Outline view, you can see all the headings in your document. If a section is in the wrong place, you can move it by simply dragging an icon or by clicking one of the buttons on the Outlining tab. To change the rank of a heading, simply click a button to promote or demote it.

To switch to Outline view, click the Outline button on the status bar or go to the View tab and click the Outline button. You see the Outlining tab, as shown in Figure 6-1. Rather than see text, you see the headings in your document, as well as the first line underneath each heading. Now you get a sense of what is in your document and whether it is organized well. By choosing an option from the Show Level drop-down list, you can decide which headings to see on-screen.

To leave Outline view when you're done reorganizing your document, click the Close Outline View button or a view button apart from Outline on the status bar.

Choose which headings to see
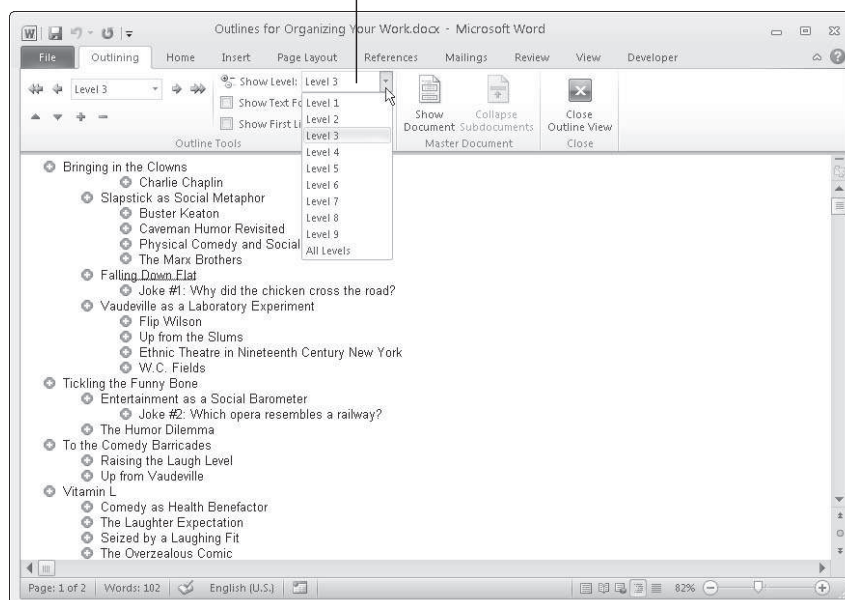
Figure 6-1: A document in Outline view.

Viewing the outline in different ways

Before you start rearranging your document in Outline view, get a good look at it:

✦ **View some or all headings:** Choose an option from the Show Level drop-down list. To see only first-level headings, for example, choose Level 1. To see first-, second-, and third-level headings, choose Level 3. Choose All Levels to see all the headings.

✦ **View heading formats:** Click the Show Text Formatting check box. When this check box is selected, you can see how headings were formatted and get a better idea of their ranking in your document.

✦ **View or hide the subheadings in one section:** To see or hide the subheadings and text in one section of a document, select that section by clicking the plus sign beside its heading; then, click the Expand button (or press Alt+Shift+plus sign) to see the subheadings, or click the Collapse button (or press Alt+Shift+minus sign) to hide the subheadings. You can also double-click the plus sign beside a heading to view or hide its subheadings.

✦ **View or hide paragraph text:** Click the Show First Line Only check box (or press Alt+Shift+L). When this check box is selected, you see only the first line in each paragraph. First lines are followed by an ellipsis (. . .) so that you know that more text follows.

Notice the plus and minus icons next to the headings and the text. A plus icon means that the item has subheadings and text under it. For example, headings almost always have plus icons because text comes after them. A minus icon means that nothing is found below the item in question. For example, body text usually has a minus icon because body text is lowest on the Outline totem pole.

Rearranging document sections in Outline view

Outline view is mighty convenient for moving sections in a document and for promoting and demoting sections. Use these techniques to rearrange and reorganize your document:

✦ **Move a section:** To move a section up or down in the document, select it and click the Move Up or Move Down button (or press Alt+Shift+↑ or Alt+Shift+↓). You can also drag the plus sign to a new location. If you want to move the subheadings and subordinate text along with the section, be sure to click the Collapse button to tuck all the subheadings and subtext into the heading before you move it.

✦ **Promote and demote headings:** Click the heading and then click the Promote button or Demote button (or press Alt+Shift+← or Alt+Shift+→). For example, you can promote a Level 3 heading to Level 2 by clicking the

Promote button. Click the Promote To Heading 1 button to promote any heading to a first-level heading; click the Demote To Body text button to turn a heading into prose.

✦ **Choose a new level for a heading:** Click the heading and choose a new heading level from the Outline Level drop-down list.

Generating a Table of Contents

A book-size document or long report isn't worth very much without a table of contents (TOC). How else can readers find what they're looking for? Generating a table of contents with Word is easy, as long as you give the headings in the document different styles — Heading 1, Heading 2, and so on. (Chapter 3 of this mini-book explains styles.) The beautiful thing about Word TOCs is the way they can be updated nearly instantly. If you add a new heading or erase a heading, you can update the TOC with a snap of your fingers. Moreover, you can quickly go from a TOC entry to its corresponding heading in a document by Ctrl+clicking the entry.

TIP

Before you create your TOC, create a new section in which to put it and number the pages in the new section with Roman numerals (Chapter 2 of this mini-book explains sections and how to number pages). TOCs, including the TOC in this book, are usually numbered in this way. The first entry in the TOC should cite page number 1. If you don't heed my advice and create a new section, the TOC will occupy the first few numbered pages of your document, and the numbering scheme will be thrown off.
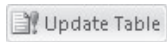
Creating a TOC

To create a table of contents, place the cursor where you want the TOC to go, visit the References tab, and click the Table of Contents button. On the drop-down list, choose one of Word's automatic TOC options or choose Insert Table of Contents to fashion a TOC on your own in the Table of Contents dialog box. (See "Customizing a TOC," later in this chapter, for information about fashioning a TOC in the Table of Contents dialog box.)

TIP

Suppose that you want to copy a TOC to another document? To copy a TOC, drag the pointer down its left margin to select it, and then press Ctrl+Shift+F9. Next, use the Copy and Paste commands to copy the TOC to the other document. Because Word gives the text of TOCs the Hyperlink character style, you have to change the color of the text in the TOC (it's blue) and remove the underlines. As for the original TOC, you "disconnected" it from the headings in your document when you pressed Ctrl+Shift+F9. Press the Undo button to undo the effects of pressing Ctrl+Shift+F9 and "disconnecting" your TOC from the headers to which it refers.

Updating and removing a TOC

Follow these instructions to update and remove a TOC:

✦ **Updating a TOC:** If you add, remove, or edit a heading in your document, your TOC needs updating. To update it, go to the References tab and click the Update Table button, or click in the TOC and press F9. A dialog box asks how to update the TOC. Either update the page numbers only or update the entire table, including all TOC entries and page numbers.

✦ **Removing a TOC:** On the References tab, click the Table of Contents button and choose Remove Table of Contents on the drop-down list.

Customizing a TOC

Want to tinker with your TOC? You can number the headings in different ways and tell Word to include or exclude certain headings.

To change around a TOC, click inside it, go to the References tab, click the Table of Contents button, and choose Insert Table of Contents on the drop-down list. You see the Table of Contents dialog box shown in Figure 6-2. Choose options to declare which headings you want for your TOC and how you want to format it:

✦ **Showing page numbers:** Deselect the Show Page Numbers box if you want your TOC to be a simple list that doesn't refer to headings by page.

✦ **Aligning the page numbers:** Select the Right Align Page Numbers check box if you want page numbers to line up along the right side of the TOC so that the ones and tens line up under each other.

✦ **Choosing a tab leader:** A *leader* is the punctuation mark that appears between the heading and the page number the heading is on. If you don't want periods as the leader, choose another leader or choose (None).

✦ **Choosing a format:** Choose a format from the Formats drop-down list if you don't care to use the one from the template. Just be sure to watch the Print Preview and Web Preview boxes to see the results of your choice.

✦ **Choosing a TOC depth:** The Show Levels box determines how many heading levels are included in the TOC. Unless your document is a legal contract or other formal paper, enter a **2** or **3** here. A TOC is supposed to help readers find information quickly. Including lots of headings that take a long time to read through defeats the purpose of having a TOC.

Figure 6-2:
You can decide for yourself which headings go in a TOC and how it's numbered.
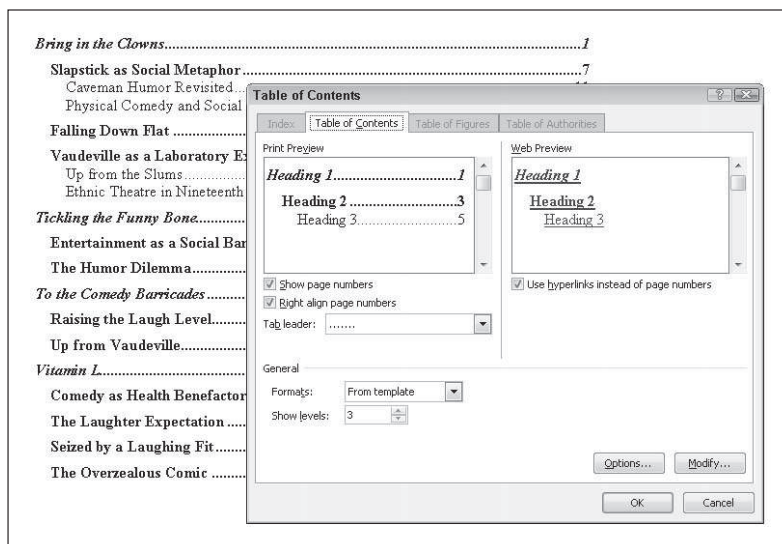
Changing the structure of a TOC

Sometimes the conventional TOC that Word generates doesn't do the trick. Just because a heading has been given the Heading 1 style doesn't mean that it should receive first priority in the TOC. Suppose that you created another style called Chapter Title that should stand taller in the hierarchy than Heading 1. In that case, you need to rearrange the TOC so that Heading 1 headings rank second, not first, in the TOC hierarchy.

Use the Table of Contents Options and Style dialog boxes to tinker with a TOC. These dialog boxes are shown in Figure 6-3. To open them, click, respectively, the Options button or Modify button in the Table of Contents dialog box (refer to Figure 6-2).

✦ **Assigning TOC levels to paragraph styles:** The Table of Contents Options dialog box lists each paragraph style in the document you're working in. For headings you want to appear in the TOC, enter a number in the TOC Level text box to determine the headings' rank. If headings assigned the Heading 1 style are to rank second in the TOC, for example, enter a 2 in Heading 1's TOC Level text box. You can exclude headings from a TOC by deleting a number in a TOC Level box.

✦ **Including table entry fields:** To include text you marked for entry in the TOC, select the Table Entry Fields check box in the Table of Contents Options dialog box (later in this chapter, the sidebar "Marking oddball text for inclusion in the TOC" explains how TOC fields work).

✦ **Changing the look of TOC entries:** The Style dialog box you see when you click the Modify button gives you the chance to choose new fonts, character styles, and font sizes for TOC entries if you generated your TOC from a template. Click the Modify button. Then, in the Style dialog box, choose options to format the TOC style. For example, click the Bold button to boldface TOC entries. (Chapter 3 of this mini-book explains modifying styles.)

Figure 6-3: Changing a TOC's structure and formatting.
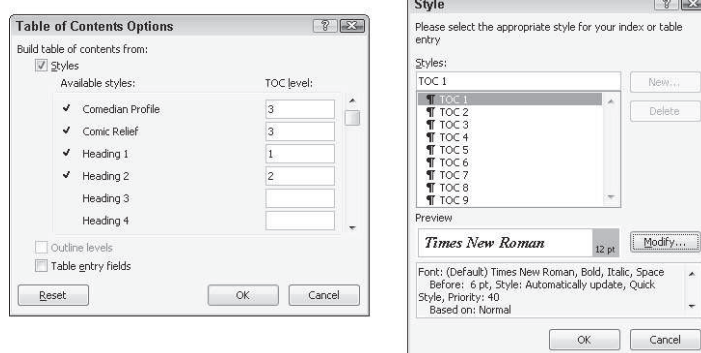
Marking oddball text for inclusion in the TOC

Table of contents entries can refer to a particular place in a document, not just to headings that have been assigned heading styles. For example, you can include figure captions. Use one of these techniques to mark an entry in your document for inclusion in the TOC:

🖊 Click in the heading, figure caption, or whatnot. Next, click the Add Text button on the References tab and choose a TOC level on the drop-down list (the Do Not Show in Table of Contents option keeps text from being included in the TOC). If you choose Level 2, for example, the entry appears with other second-level headings.

🖊 Click in a heading or text and press Alt+Shift+O. Then, in the Mark Table of Contents Entry dialog box, make sure that the words you want to appear in the TOC appear in the Entry text box (edit or enter the words if need be), and make sure that C (for Contents) appears in the Table Identifier box. In the Level box, enter a number to tell Word how to treat the entry when you generate the table of contents. For example, entering **1** tells Word to treat the entry like a first-level heading and give it top priority. A **3** places the entry with the third-level headings. Finally, click the Mark button.

When you generate the table of contents, be sure to include the oddball entries. To do that, click the Options button in the Table of Contents dialog box and, in the Table of Contents Options dialog box (refer to Figure 6-3), select the Table Entry Fields check box.

Indexing a Document

A good index is a thing of beauty. User manuals, reference works of any length, and reports that readers will refer to all require indexes. Except for the table of contents, the only way to find information in a long document is to look in the index. An index at the end of a company report reflects well on the person who wrote the report. It gives the appearance that the author put in a fair amount of time to complete the work, even if he or she didn't really do that.

An index entry can be formatted in many ways. You can cross-reference index entries, list a page range in an index entry, and break out an index entry into subentries and sub-subentries. To help you with your index, Figure 6-4 explains indexing terminology.

Main entry

Sand Creek, Battle of *See* Indian Wars — Cross-reference

Sioux City, 191

Sioux Indians, 149–157 — Page range

   daily life, 151

   religious observances, 153

     shaman, 153 — Sub-subentries

     Sun Dance, 155

    at Standing Rock Reservation, 150

Sitting Bull, 156, 159

Figure 6-4: Different ways of handling index entries.

Subentries

REMEMBER

Writing a good index entry is as hard as writing a good, descriptive heading. As you enter index entries in your document, ask yourself how you would look up information in the index, and enter your index entries accordingly.

Marking index items in the document

The first step in constructing an index is to mark index entries in your document. Marking index items yourself is easier than it seems. After you open the Mark Index Entry dialog box, it stays open so that you can scroll through your document and make entries.

1. **If you see a word or phrase in your document that you can use as a main, top-level entry, select it; otherwise, place the cursor in the paragraph or heading whose topic you want to include in the index.**

   You can save a little time by selecting a word, as I describe shortly.

2. **On the References tab, click the Mark Entry button (or press Alt+Shift+X).**

   The Mark Index Entry dialog box appears. If you selected a word or phrase, it appears in the Main Entry box.

3. **Choose how you want to handle this index entry (refer to Figure 6-4 to see the various ways to make index entries).**

   When you enter the text, don't put a comma or period after it. Word does that when it generates the index. The text that you enter appears in your index.

   - *Main Entry:* If you're entering a main, top-level entry, leave the text in the Main Entry box (if it's already there), type new text to describe this entry, or edit the text that's already there. Leave the Subentry box blank.

   - *Subentry:* To create a subentry, enter text in the Subentry box. The subentry text will appear in the index below the main entry text, so make sure that some text is in the Main Entry box and that the subentry text fits under the main entry.

   - *Sub-subentry:* A sub-subentry is the third level in the hierarchy. To create a sub-subentry, type the subentry in the Subentry box, enter a colon (:), and type the sub-subentry without entering a space, like so: **religious observances:shaman**.

4. **Decide how to handle the page reference in the entry.**

   Again, your choices are many:

   - *Cross-reference:* To go without a page reference and refer the reader to another index entry, click the Cross-Reference option button and type the other entry in the text box after the word *See*. What you type here appears in your index, so be sure that the topic you refer the reader to is really named in your index.

   - *Current Page:* Click this option to enter a single page number after the entry.

   - *Page Range:* Click this option if you're indexing a subject that covers several pages in your document. A page range index entry looks something like this: "Sioux Indians, 149–157." To make a page range entry, you must create a bookmark first. Leave the Mark Index Entry dialog box, select the text in the page range, and press Ctrl+Shift+F5 or click the Bookmark button on the Insert tab. In the Bookmark dialog box, enter a name in the Bookmark Name box, and click the Add button. (Chapter 1 of this mini-book explains bookmarks.)

5. **You can boldface or italicize a page number or page range by clicking a Page Number Format check box.**

   In some indexes, the page or page range where the topic is explained in the most depth is italicized or boldfaced so that readers can get to the juiciest parts first.

6. **If you selected a single word or phrase in Step 1, you can click the Mark All button to have Word go through the document and mark all words that are identical to the one in the Main Entry box; click Mark to put this single entry in the index.**

   Click outside the Mark Index Entry dialog box and find the next topic or word that you want to mark for the index. Then click the Mark Entry button on the References tab and make another entry.

REMEMBER

A bunch of ugly field codes appear in your document after you mark an index entry. You can render them invisible by clicking the Show/Hide¶ button on the Home tab (or pressing Ctrl+Shift+8).

Generating the index

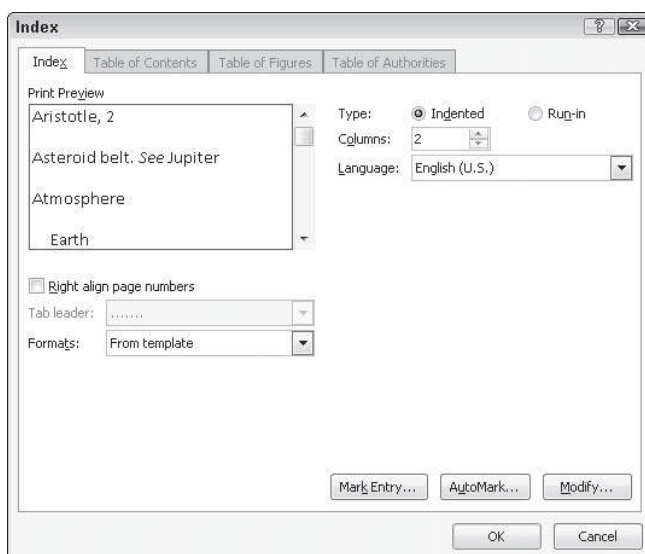After you mark all the index entries, it's time to generate the index:

1. **Place the cursor where you want the index to go, most likely at the end of the document.**

   You might type the word **Index** at the top of the page and format the word in a decorative way.
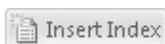
   Insert Index

2. **On the References tab, click the Insert Index button.**

   You see the Index dialog box shown in Figure 6-5.

Figure 6-5:
Generating
an index.

3. **Choose options in the dialog box and click OK.**

    As you make your choices, watch the Print Preview box to see what happens.

Here are the options in the Index dialog box:

✦ **Type:** Choose Run-in if you want subentries and sub-subentries to run together; choose Indented to indent subentries and sub-subentries below main entries (refer to Figure 6-4).

✦ **Columns:** Stick with 2, unless you don't have subentries or sub-subentries and you can squeeze three columns on the page or you are working on a landscape document.

✦ **Language:** Choose a language for the table, if necessary and if you have installed a foreign language dictionary. If you have installed the dictionary, you can run the spell checker over your index and make sure that the entries are spelled correctly. (Book I, Chapter 4 explains foreign language dictionaries.)

✦ **Right Align Page Numbers:** Normally, page numbers appear right after entries and are separated from entries by a comma, but with this option you can right-align the entries so that they line up under one another.

✦ **Tab Leader:** Some index formats place a *leader* between the entry and the page number. A leader is a series of dots or dashes. If you're working with a format that has a leader, you can choose a leader from the drop-down list.

✦ **Formats:** Word offers a number of attractive index layouts. You can choose one from the list.

✦ **Modify:** Click this button if you're adventurous and want to create an index style of your own (Chapter 3 of this mini-book explains styles).

To update an index after you create or delete entries, click it and then click the Update Index button or right-click the index and then choose Update Field on the shortcut menu.

Editing an index

After you generate an index, read it carefully to make sure that all entries are useful to readers. Inevitably, something doesn't come out right, but you can edit index entries as you would the text in a document. Index field markers are enclosed in curly brackets with the letters *XE* and the text of the index entry in quotation marks, like so: `{ XE: "Wovoka: Ghost Dance" }`. To edit an index marker, click the Show/Hide¶ button on the Home tab (or press Ctrl+Shift+8) to see the field markers and find the one you need to edit. Then delete letters or type letters as you would do in normal text.

TIP

Here's a quick way to find index field markers: After clicking the Show/Hide¶ button, with the index fields showing, press Ctrl+G to open the Go To tab of the Find and Replace dialog box. In the Go to What menu, choose Field; type **XE** in the Enter Field Name box, and click the Next button until you find the marker you want to edit. You can also use the Find command on the Home tab to look for index entries. Word finds index entries as well as text provided that you click the Show/Hide¶ button to display index fields in your document.

# Putting Cross-References in a Document

Cross-references are very handy indeed. They tell readers where to go to find more information on a topic. The problem with cross-references, however, is that the thing being cross-referenced really has to be there. If you tell readers to go to a heading called "The Cat's Pajamas" on page 93, and neither the heading nor the page is really there, readers curse and tell you where to go, rather than the other way around.

Fortunately for you, Word lets you know when you make errant cross-references. You can refer readers to headings, page numbers, footnotes, endnotes, and plain-old paragraphs. And as long you create captions for your cross-references with the Insert Caption button on the References tab, you can also make cross-references to equations, figures, graphs, listings, programs, and tables. If you delete the thing that a cross-reference refers to and render the cross-reference invalid, Word tells you about it the next time you update your cross-references. Best of all, if the page number, numbered item, or text that a cross-reference refers to changes, so does the cross-reference.

To create a cross-reference:

1. **Write the first part of the cross-reference text.**

   For example, you could write **To learn more about these cowboys of the pampas, see page** and then type a blank space. The blank space separates the word *page* from the page number in the cross-reference. If you are referring to a heading, write something like **For more information, see "**. Don't type a blank space this time because the cross-reference heading text will appear right after the double quotation mark.
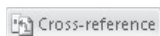
2. **On the References tab, click the Cross-Reference button.**

   The Cross-Reference dialog box appears, as shown in Figure 6-6.

3. **Choose what type of item you're referring to in the Reference Type drop-down list.**

   If you're referring to a plain-old paragraph, choose Bookmark. Then click outside the dialog box, scroll to the paragraph you're referring to, and place a bookmark there (Chapter 1 of this mini-book explains bookmarks.)

Choose what the reference refers to

Choose how to refer to the item
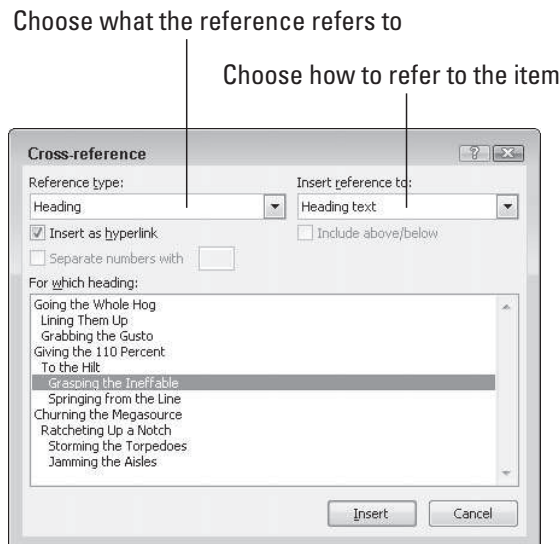
Figure 6-6:
Entering
a cross-
reference.

4. **Make a choice in the Insert Reference To box to refer to text, a page number, or a numbered item.**

   The options in this box are different, depending on what you chose in Step 3.

   - *Text:* Choose this option (Heading Text, Entire Caption, and so on) to include text in the cross-reference. For example, choose Heading Text if your cross-reference is to a heading.

   - *Number:* Choose this option to insert a page number or other kind of number, such as a table number, in the cross-reference.

   - *Include Above/Below:* Select this box to include the word *above* or *below* to tell readers where, in relation to the cross-reference, the thing being referred to is located in your document.

5. **If you want, leave the check mark in the Insert as Hyperlink check box to create a hyperlink as well as a cross-reference.**

   With a hyperlink, someone reading the document on-screen can Ctrl+click the cross-reference and go directly to what it refers to.

6. **In the For Which box, tell Word where the thing you're referring to is located.**

   To do so, select a heading, bookmark, footnote, endnote, equation, figure, graph, or whatnot. In long documents, you almost certainly have to click the scrollbar to find the one you want.

7. **Click the Insert button and then click the Close button.**

8. **Back in your document, enter the rest of the cross-reference text, if necessary.**

When you finish creating your document, update all the cross-references. To do that, press Ctrl+A to select the entire document. Then press F9 or right-click in the document and choose Update Field on the shortcut menu.

> **TIP** If the thing referred to in a cross-reference is no longer in your document, you see `Error! Reference source not found` where the cross-reference should be. To find cross-reference errors in long documents, look for the word *Error!* with the Find command (press Ctrl+F). Investigate what went wrong, and repair or delete errant cross-references.

Putting Footnotes and Endnotes in Documents

A *footnote* is a bit of explanation, a comment, or a reference that appears at the bottom of the page and is referred to by a number or symbol in the text. An *endnote* is the same thing, except that it appears at the end of the section, chapter, or document. If you've written a scholarly paper of any kind, you know what a drag footnotes and endnotes are.

You will be glad to know that Word takes some of the drudgery out of footnotes and endnotes. For example, if you delete or add a note, all notes after the one you added or deleted are renumbered. And you don't have to worry about long footnotes because Word adjusts the page layout to make room for them. You can change the numbering scheme of footnotes and endnotes at will. When you are reviewing a document, all you have to do is move the pointer over a footnote or endnote citation. The note icon appears, as does a pop-up box with the text of the note.
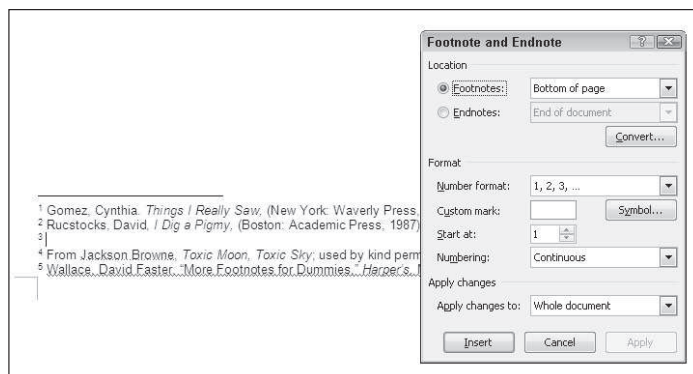
Entering a footnote or endnote

To enter a footnote or endnote in a document:

1. **Place the cursor in the text where you want the note's number or symbol to appear.**

2. **On the References tab, click the Insert Footnote button (or press Ctrl+Alt+F) or the Insert Endnote button (or press Ctrl+Alt+D).**

   If you are in Draft view, the Notes pane opens at the bottom of the screen with the cursor beside the number of the note you're about to enter. In Print Layout view, Word scrolls to the bottom of the page or the end of the document or section so that you can enter the note, as shown in Figure 6-7.

3. **Enter your footnote or endnote.**

4. **Click the Close button in the Notes pane if you're in Draft view; in Print Layout view, scroll upward to return to the main text.**

Figure 6-7:
Entering a
footnote in
Print Layout
view (left);
the Footnote
and Endnote
dialog box
(right).

Click the Show Notes button at any time to see your notes in the Notes pane, at the bottom of the page, or at the end of the section or document.

To quickly return from writing a note to the place in your document where the footnote or endnote number citation is located, double-click the number citation at the bottom of the page (in Print Layout view) or the Notes pane (in Draft view). For example, if you just finished entering footnote 3, double-click the number *3*.

Choosing the numbering scheme and position of notes

Choosing the numbering scheme and positioning of endnotes and footnotes is quite easy. On the References tab, click the Footnotes group button. The Footnote and Endnote dialog box appears (refer to Figure 6-7). Tell Word where to place your notes:

✦ **Footnotes:** Choose Bottom of Page to put footnotes at the bottom of the page no matter where the text ends; choose Below Text to put footnotes directly below the last line of text on the page.

✦ **Endnotes:** Choose End of Section if your document is divided into sections (such as chapters) and you want endnotes to appear at the back of sections; choose End of Document to put all endnotes at the very back of the document.

In the Format area, tell Word how to number the notes:

✦ **Number Format:** Choose A B C, i ii iii, or another numbering scheme, if you want. You can also enter symbols by choosing the last option on this drop-down list.

✦ **Custom Mark:** You can mark the note with a symbol by clicking the Symbol button and choosing a symbol in the Symbol dialog box. If you go this route, you have to enter a symbol each time you insert a note.

Not only that, you may have to enter two or three symbols for the second and third notes on each page or document because Word can't renumber symbols.

✦ **Start At:** To start numbering the notes at a place other than 1, A, or i, enter **2**, **B**, **ii**, or whatever in this box.

✦ **Numbering:** To number the notes continuously from the start of your document to the end, choose Continuous. Choose Restart Each Section to begin anew at each section of your document. For footnotes, you can begin anew on each page by choosing Restart Each Page.

By the way, the Convert button in the Footnote and Endnote dialog box is for fickle scholars who suddenly decide that their endnotes should be footnotes or vice versa. Click it and choose an option in the Convert Notes dialog box to turn footnotes into endnotes, turn endnotes into footnotes, or — in documents with both endnotes and footnotes — make the endnotes footnotes and the footnotes endnotes.

Deleting, moving, and editing notes

If a devious editor tells you that a footnote or endnote is in the wrong place, that you don't need a note, or that you need to change the text in a note, all is not lost:

✦ **Editing:** To edit a note, double-click its number or symbol in the text. You see the note on-screen. Edit the note at this point.

✦ **Moving:** To move a note, select its number or symbol in the text and drag it to a new location, or cut and paste it to a new location.

✦ **Deleting:** To delete a note, select its number or symbol and press the Delete key.

Footnotes and endnotes are renumbered when you move or delete one of them.

Compiling a Bibliography

A *bibliography* is a list, usually in alphabetical order by author name, of all the books, journal articles, Web sites, interviews, and other sources used in the writing of an article, report, or book. Writing a good bibliography is a chore. Besides keeping careful track of sources, you have to list them correctly. Does the author's name or work's name come first in the citation? How do you list a Web site or magazine article without an author's name?

Word's Bibliography feature is very nice in this regard: It solves the problem of how to enter citations for a bibliography. All you have to do is enter the bare facts about the citation — the author's name, title, publication date,

publisher, and so on — and Word presents this information correctly in the bibliography. You can choose among several popular bibliographical styles (APA, Chicago, and others) from the Style drop-down list, as shown in Figure 6-8. After you make your choice, Word reformats all bibliography citations. You don't have to worry about whether titles should be underlined or italicized, or how authors' names should be listed in the bibliography.

Insert a citation   Choose a bibliography style

Figure 6-8:
Adding a citation (left) and formatting citations (right) for a bibliography.
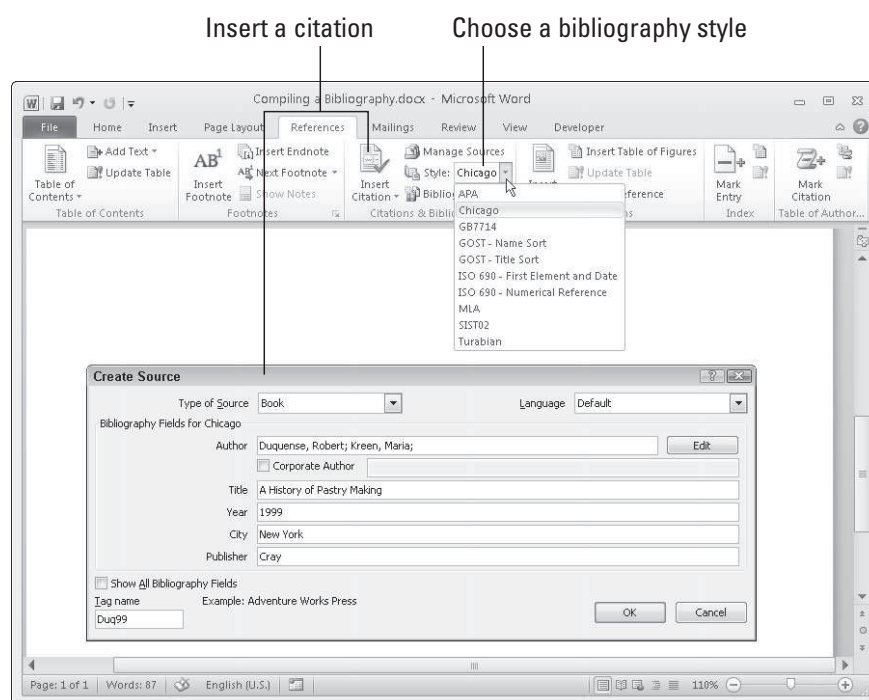
Inserting a citation for your bibliography

Abbreviated citations appear in the text of your document in between parentheses where you enter citations; the complete citation appears in the bibliography. After you enter the information about a citation, entering it a second time is easy because Word keeps a master list of all citations you have used in your work, both in the document you are working on and in your other documents. To enter a citation, click in your document at the place that refers to the source, go to the References tab, and use one of these techniques to enter the citation:

✦ **Entering a citation you've already entered in your document:** Click the Insert Citation button and choose the citation on the drop-down list. The top of the drop-down list presents citations you've already entered.

✦ **Creating a new citation:** Click the Insert Citation button and choose Add New Source. You see the Create Source dialog box shown in Figure 6-8. Choose an option on the Type of Source drop-down list and enter par-

ticulars about the source. You can click the Show All Bibliography Fields check box to enlarge the dialog box and enter all kinds of information about the source. Whether clicking the check box is necessary depends on how detailed you want your bibliography to be.

✦ **Inserting a citation placeholder:** Click the Insert Citation button and choose Add New Placeholder if you're in a hurry and you don't currently have all the information you need to describe the source. The Placeholder Name dialog box appears. Enter a placeholder name for the source and click OK. Later, when you have the information for the source, either click the citation in the text and choose Edit Source on its drop-down list or click the Manage Sources button, and in the Source Manager dialog box, select the placeholder name (it has a question mark next to it) and click the Edit button. You see the Edit Source dialog box. Enter the information and click OK.
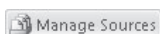
✦ **Inserting a citation you've entered in another document:** Click the Manage Sources button. You see the Source Manager dialog box. In the Master List, select the source you need and click the Copy button. Then click Close and enter the citation by clicking the Insert Citation button and choosing the name of the citation you copied.

Your citation appears in text in parentheses. Move the pointer over it and you see an inline drop-down list that you can open to edit the citation as it appears in-text as well as edit it in the bibliography, as shown in Figure 6-9.

Figure 6-9: In-text citations have inline drop-down lists.
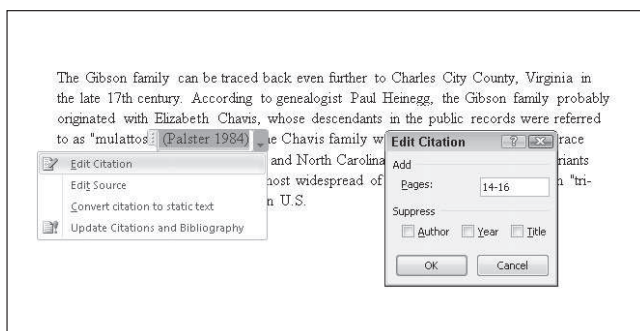
Editing a citation

Use one of these techniques to edit a citation:

✦ Open the citation's inline drop-down list (refer to Figure 6-9) and choose Edit Source. You see the Edit Source dialog box, where you can edit the citation.

✦ Click the Manage Sources button on the References tab. The Source Manager dialog box appears. Select the citation, click the Edit button, and change around the citation in the Edit Source dialog box.

Changing how citations appear in text

Citations appear in text enclosed in parentheses. Use one of these techniques to change how a citation appears in the text of your document:

✦ **Changing what's in parentheses:** Open the citation's drop-down list and choose Edit Citation (refer to Figure 6-9). You see the Edit Citation dialog box. To suppress the author's name, year, or title from appearing inside parentheses, click the Author, Year, or Title check box (whether the citation in parentheses lists the author, year, or title depends on which citation style you choose). To make page numbers appear with the citation, enter page numbers in the Pages box.

✦ **Removing the in-text citation:** Swipe over the citation to select it and press Delete. Removing an in-text citation this way does not prevent the citation from appearing in the bibliography.

Generating the bibliography

Go to the References tab and follow these steps to generate your bibliography:

1. **Click in your document where you want the bibliography to appear.**

Probably that place is toward the end of the document.

2. **On the References tab, open the Style drop-down list and choose a style.**

If you're generating your bibliography for a paper you will submit to a journal or institution, ask the editors which style they prefer for bibliographies and choose that style from the list.
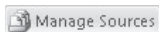
3. **Click the Manage Sources button.**

You see the Source Manager dialog box. Citations in the Current List box will appear in your bibliography.

4. **If necessary, address citations in the Current List box.**

If you entered any citation placeholders, their names appear in the list next to question marks. Select these placeholders, click the Edit button, and enter information in the Edit Source dialog box.

To keep a citation from appearing in the bibliography, select it and click the Delete button.

5. **Click the Close button in the Source Manager dialog box.**
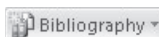
6. **Click the Bibliography button and choose a built-in bibliography or the Insert Bibliography command on the drop-down list.**

There it is — your bibliography.