Part II

Creating Documents with Word

Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
6
URL:

Chapter 4

Building a Basic Document

Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
URL:

How to…

- Start with a new, blank document
- Start a new document from a template
- Move around in a Word document
- Select text with the keyboard and mouse
- Enter, edit, and rearrange text efficiently

Of the entire Office suite, Word is the most often-used application. Why? Because no matter what you do at work or in your personal life, you need to write. If your writing primarily consists of email and you use Outlook, chances are Word is your email editor, so you're *still* using Word several times a day. If you're like most people, whose correspondence and documentation needs are more varied, you need to write letters, memos, notes, stories, poems, grocery lists, and even manifestos. Whatever you need to write, Word has tools that can take thoughts currently residing in your head and help you transfer them to the computer, where they can end up on paper or even on the web. In this chapter, you'll learn the basics of entering and editing text in the Word workspace and how to efficiently move around in a Word document, making your entry, editing, and formatting tasks much easier.

Getting Started in Word

When you open the Word application, you're faced with a blank slate—a big white space, awaiting your text. This white area (also known as the *document window*) is surrounded by tools. You'll find toolbars, menus, a task pane, a status bar, and lots of tools and features to empower you as you write your letter, memo, report—whatever it is you're creating. As shown in Figure 4-1, it's a busy but logically constructed workspace.

The blank page also contains a *cursor*, also known as an insertion point. Whenever the document is active, the cursor will be blinking, waiting for you to type. The fact that the cursor greets you when you open a new Word document is further proof that you don't need to know much about Word to create a document. Just start typing at the cursor, and Word's default settings for text handling and formatting will do much of the rest.

The Not-So-Blank Document

The blank document that Word offers up when you first open the application isn't really blank. I know it looks blank (all except for that blinking cursor), but it isn't. There's a lot going on, and a lot of settings are in place to help you build a document without too much planning or effort. Your blank document is based on something called the *Normal template*, a cookie cutter of sorts that dictates some basic features of a new document:

- **Font** Already decided for you, Times New Roman, in 12 points, is the default font for new documents. It's a font that's acceptable in business and personal documents; it's highly legible, photocopies well, and is *web-safe*, meaning that browser software (Internet Explorer or Netscape) happily displays it.

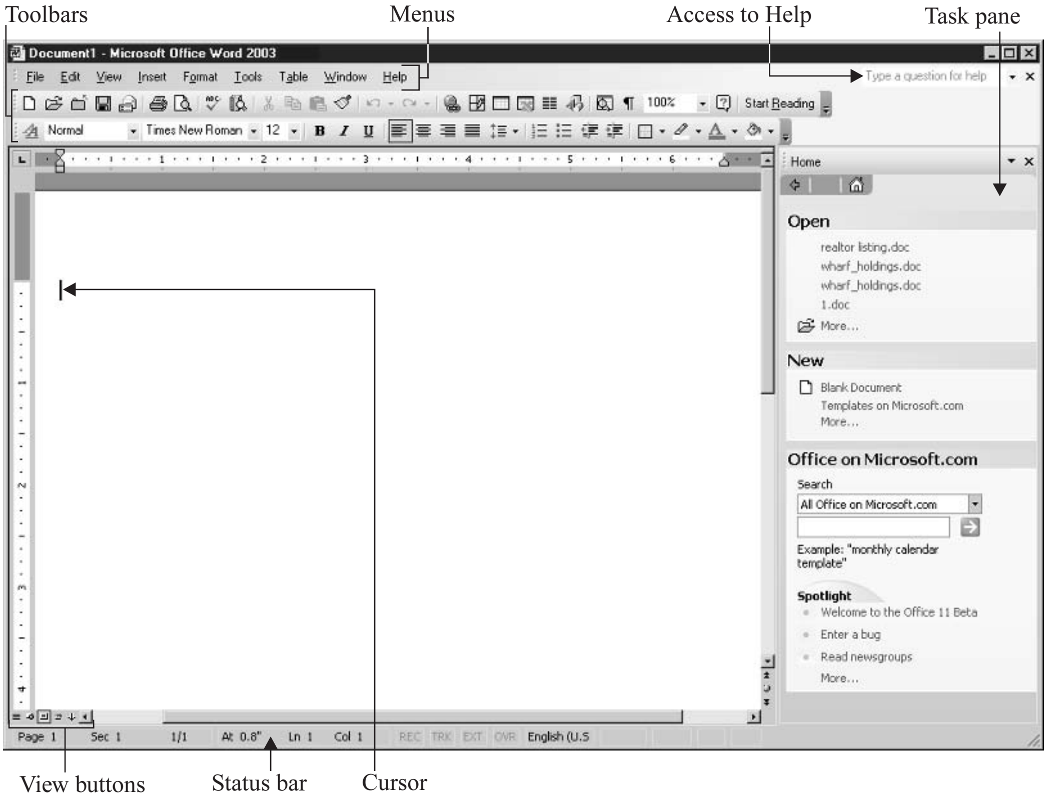
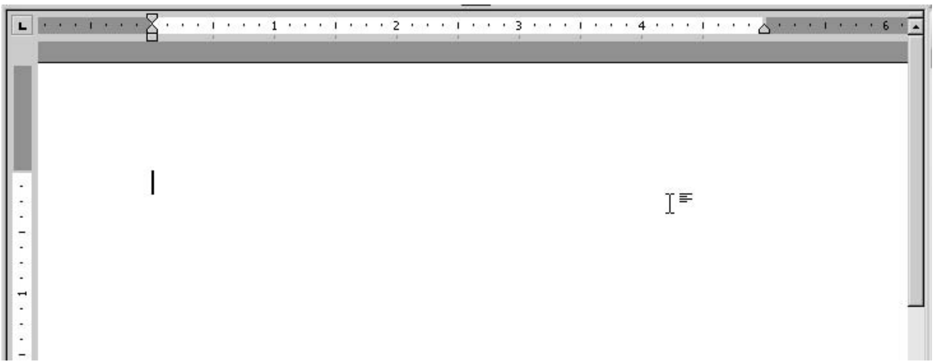

Toolbars
Menus
Access to Help
Task pane
Document1 - Microsoft Office Word 2003
File Edit View Insert Format Tools Table Window Help
Type a question for help
100%
Start Reading
Normal
Times New Roman
12
Home
Open
realtor listing.doc
wharf_holdings.doc
wharf_holdings.doc
1.doc
More...
New
Blank Document
Templates on Microsoft.com
More...
Office on Microsoft.com
Search
All Office on Microsoft.com
Example: "monthly calendar template"
Spotlight
Welcome to the Office 11 Beta
Enter a bug
Read newsgroups
More...
Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 1 REC TRK EXT OVR English (U.S
View buttons
Status bar
Cursor

FIGURE 4-1 Tools are found above, below, and in the task pane on the right.

- **Margins** Default margins are set at 1 inch from the top and bottom, and 1.25 inches from the left and right sides of the paper. This is standard for business and personal correspondence. In Print Layout view (View | Print Layout), you can see your top and left margins represented by gray areas on the ruler, as shown in the following:



- **Line spacing** Single spacing is the default, and although you can change it (see Chapter 6), it's set to the normal spacing for most documents.
- **Alignment** By default, all your text is left aligned, meaning it lines up with the left margin.
- **Bullets and numbers** Need to type a list? Default bullets for unordered lists and simple Arabic numerals for ordered lists are ready and waiting.
- **AutoCorrect and AutoFormat** As you type, Word will correct common misspellings and typos and apply formatting (such as automatic list numbering) when conditions seem to call for it.

If you need to start a new, blank document again after opening Word, you can do so using any of these methods:

- Press CTRL-N.
- Click the New Blank Document button on the Standard toolbar.
- Choose New from the File menu.
- Click the Blank Document link in the New section of the task pane.

When you open Word, the document you get at first is called Document1. Any subsequent documents you create are numbered consecutively—Document2, Document3, and so on—and each opens in its own window and is represented by an individual taskbar button. When you close and reopen the Word application (not just individual documents), the numbering starts over with Document1.

Starting with a Template

Word comes with a large selection of document templates that go the blank, Normal template one better. Rather than being blank with some defaults set for a vanilla document, these templates have common elements—headings, paragraph text (in some cases), forms, graphics, and color—

How to ... See More of a Page

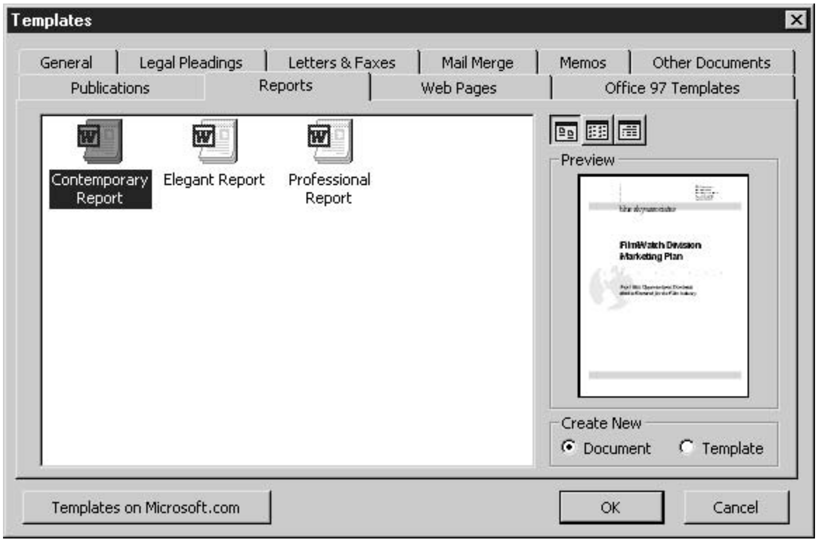
Want to see more of the page while you work? Reduce the Zoom percentage. Click the Zoom button on the Standard toolbar (it appears as a percentage) or choose View | Zoom. A zoom such as 50 or 75 percent will show you more of the page from side to side and from top to bottom. You can also choose Page Width or Whole Page if you're in Print Layout view (View | Print Layout).

that every document based on the template in question will require. There are web page templates, legal-pleading templates, letter templates, fax coversheet templates, memo templates, and templates for a variety of reports and publications. You can access them through the File | New command or by clicking the On My Computer link in the Other Templates section of the New Document task pane (it appears when you choose File | New). Figure 4-2 shows the Templates dialog box that appears when you click that link.

TIP *You can also search the web for templates by typing a keyword in the Search box in the Templates on Microsoft.com section of the New Document task pane. This requires that you be online, of course, and goes to a store of templates at Microsoft's website.*

When you start a new document based on a template, you're not opening the template. Instead, you're using the template as a foundation for the new document. The new document will start its life with everything the template had, and then it's up to you to fill it. As shown in Figure 4-3, the Contemporary Report template provides a coversheet with a heading, space for your organization's name, and other text that you can replace with your own information for your report's cover page.

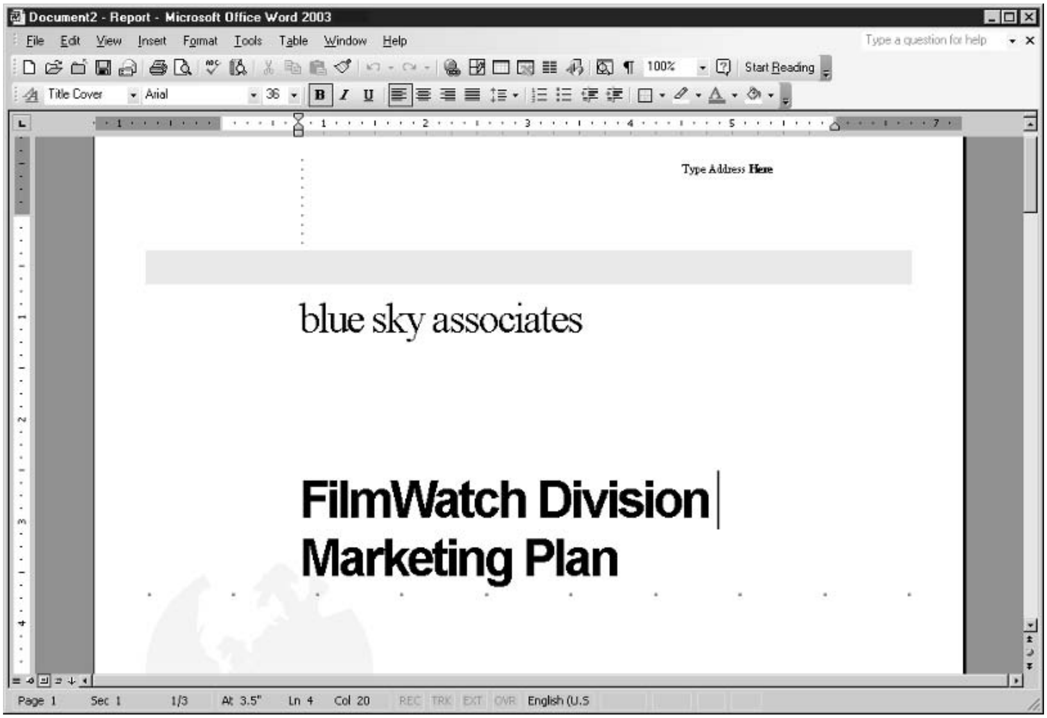
Templates help maintain consistency in an office. If everyone uses the same memo template, everyone's memos will look the same. Templates also speed the process of building a document by inserting much of the content and formatting for you, so all that's left to do is fill in specific text and information. Any changes made to the template-based document do *not* affect the template itself. It will remain in its original condition for the next time you use it.



Create New: ● Document ○ Template

Templates
General
Legal Pleadings
Letters & Faxes
Mail Merge
Memos
Other Documents
Publications
Reports
Web Pages
Office 97 Templates
Contemporary Report
Elegant Report
Professional Report
Preview
FilmWatch Division Marketing Plan
Templates on Microsoft.com
OK
Cancel

FIGURE 4-2 Choose from several template categories, each represented by a tab in the Templates dialog box.


Document2 - Report - Microsoft Office Word 2003
File Edit View Insert Format Tools Table Window Help
Type a question for help
100%
Start Reading
Title Cover
Arial
36
Page 1 Sec 1 1/3 At 3.5" Ln 4 Col 20 REC TRK EXT OVR English (U.S

Type Address Here

blue sky associates

FilmWatch Division
Marketing Plan

FIGURE 4-3 Enter your own information to replace the instructional text, and you have a cover sheet for your report.

TIP *Want more templates? If you don't think that Office has enough installed templates for your needs, you can download more from Microsoft—just visit office.microsoft.com.*

Typing Your Document Content

So you have your new, blank document, or perhaps a template-based document, open onscreen and you want to start typing your text. Well, what are you waiting for? Just start typing. As long as you can see a blinking cursor, you're ready to go. If you want to start typing at a different spot in the document, move the cursor by clicking your mouse in a different place on the page, or use the arrow keys to reposition the cursor one character or line at a time.

As you type, Word might interact with you. Those smart tags might chime in if Word thinks it can help you make use of what you've typed in another application. If you type a word that isn't in Word's internal dictionary, the word will be underlined with a red, wavy line. If you make mistakes that Word has stored in its collection of common errors and corrections, it will fix your

How to ... Accept Word's Suggested Completions

As you're typing, Word may take a guess as to what you're trying to say. For example, if you start typing "Sept" (the beginning of the word September) and it happens to *be* September at the time, Word will assume that you're trying to type the date and will offer up the system date in a ScreenTip, just above your text. If that's what you want to type, just press ENTER, and the date is inserted automatically. Word makes other guesses, such as To Whom It May Concern (if you type "To" in the salutation spot in a letter). If you don't want what Word is suggesting, just keep typing and the ScreenTip will go away—but if you do like the suggestion, take it!

mistake for you, working so fast that you might not even notice it happening. You'll find out how to deal with spell checking and other proofing tools in Chapter 5.

TIP *Find out more about the corrections and changes that Word makes automatically and learn to control when and how those corrections are made in Chapter 5.*

Working with Word Wrap

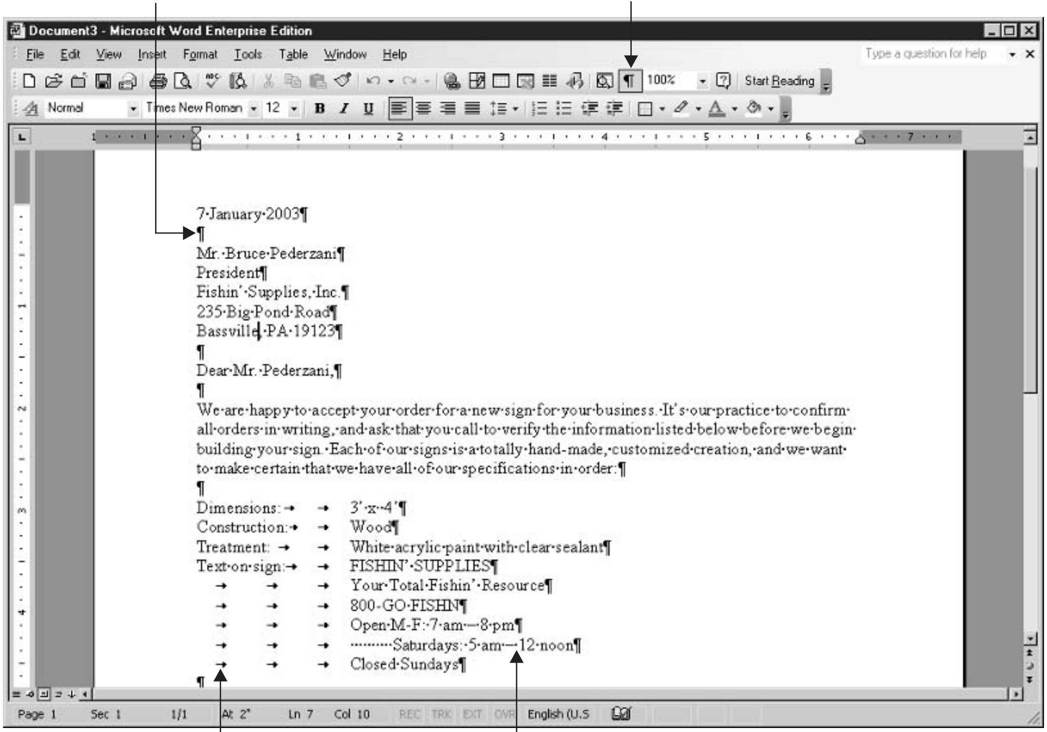
As you type your text, it's important that you really just type. Don't worry about your margins or press ENTER in anticipation of running into the right margin. Word will automatically flow your text from one line to the next, using a feature called *word wrap*.

Word wrap only works if you let it. If you press ENTER at points other than the end of a paragraph or between items in a list, you'll be preventing word wrap from working, and you'll also be breaking your paragraphs into smaller paragraphs than you want to. As shown in Figure 4-4, a paragraph that is allowed to flow naturally will break at the right margin on its own, and the text will flow onto the next line.

However, if you press ENTER at the right margin, your paragraph is broken into several paragraphs (each a single line), and it will be impossible to set indents and other paragraph formats for the entire paragraph because Word sees it as several small paragraphs instead. To see if your document contains any of these unnecessary breaks, click the Show/Hide button on the Standard toolbar.

Working with Paragraph and Line Breaks

When you do want to break a paragraph, you can press ENTER. This should only be done at the end of a paragraph or at the end of each item in a list. It's important to understand that every time you press ENTER, you're creating a paragraph and inserting a paragraph code (those backward "P" characters that display when you click the Show/Hide button). That means that in a letter,



Document3 - Microsoft Word Enterprise Edition
File Edit View Insert Format Tools Table Window Help
Type a question for help
100%
Start Reading
Normal
Times New Roman
12
Page 1 Sec 1 1/1 At 2" Ln 7 Col 10 REC TRK EXT OVR English (U.S

7·January·2003¶
¶
Mr.·Bruce·Pederzani¶
President¶
Fishin'·Supplies,·Inc.¶
235·Big·Pond·Road¶
Bassville·PA·19123¶
¶
Dear·Mr.·Pederzani,¶
¶
We·are·happy·to·accept·your·order·for·a·new·sign·for·your·business.·It's·our·practice·to·confirm·all·orders·in·writing,·and·ask·that·you·call·to·verify·the·information·listed·below·before·we·begin·building·your·sign.·Each·of·our·signs·is·a·totally·hand-made,·customized·creation,·and·we·want·to·make·certain·that·we·have·all·of·our·specifications·in·order:¶
¶
Dimensions:→ → 3'·x··4'¶
Construction:→ → Wood¶
Treatment: → → White·acrylic·paint·with·clear·sealant¶
Text·on·sign:→ → FISHIN'·SUPPLIES¶
→ → → Your·Total·Fishin'·Resource¶
→ → → 800-GO·FISHN¶
→ → → Open·M-F:·7·am·—·8·pm¶
→ → → ·········Saturdays:·5·am·—·12·noon¶
→ → → Closed·Sundays¶
¶

Paragraph marks indicate that the ENTER key was pressed.

The Show/Hide button displays even hidden characters and codes.

Arrows indicate that the TAB key was pressed.

Dots indicate spaces.

FIGURE 4-4 It might sound like advice found in a self-help book, but you really should let your words flow.

the date is a paragraph, each line of the recipient address is a paragraph, and even the salutation "To Whom It May Concern," is a paragraph.

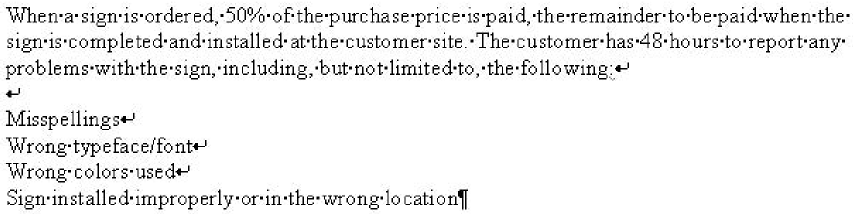
If you don't want to break a paragraph and insert a paragraph code, you can create a line break instead. This forces text (beginning at the current cursor position) onto the next line but doesn't create a paragraph break. The result? You can format the entire paragraph, the text before and after the line break included, because Word will still see the text as one paragraph. This can make it faster and easier to apply paragraph formats such as indents, alignments, and styles that are paragraph oriented. You'll learn about all sorts of formatting options, including those applicable only to paragraphs, in Chapter 6.

To insert a line break, press SHIFT-ENTER. As shown in the following illustration (Show/Hide is on), the resulting line break code looks different from a paragraph code and behaves differently

How to ... Create Consistent Indents

As with ENTER, another key you should use judiciously is the SPACEBAR. Don't use the SPACEBAR to indent a paragraph or items in a list. Instead, use TAB when you need to indent. The only time you want to press the SPACEBAR is to insert a space between words or sentences, or after commas. Why? Because for all non-monospace fonts, Word is typesetting your text as you type, creating effective spacing between characters (a process also known as *kerning*), spreading your text across the page for maximum legibility. If the font has the word "monospace" in its title, the space between all characters typed in that font will be uniform, and therefore kerning is neither possible nor necessary. For the vast majority of fonts, however, the width of a space is based on the width of the characters before and after it—so unless every indented paragraph or list item starts with the same character, they'll never line up vertically because the spaces in front of them won't be the same width. A tab is based on measurement (by default, a half-inch per TAB press), so the text has no impact on the depth of an indent created with TAB.

as well. The paragraph remains intact, despite this interruption in the natural flow of text, as indicated by the paragraph code that appears at the true end of the paragraph.



When·a·sign·is·ordered,·50%·of·the·purchase·price·is·paid,·the·remainder·to·be·paid·when·the·sign·is·completed·and·installed·at·the·customer·site.·The·customer·has·48·hours·to·report·any·problems·with·the·sign,·including,·but·not·limited·to,·the·following:↵
↵
Misspellings↵
Wrong·typeface/font↵
Wrong·colors·used↵
Sign·installed·improperly·or·in·the·wrong·location¶

Navigating a Word Document

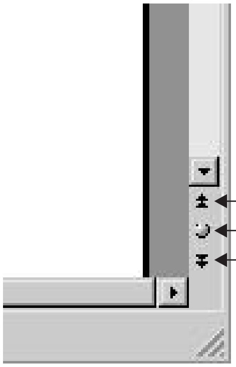
It's a rare document that is typed from top to bottom, saved, printed, and closed, without the author ever having to reposition the cursor within previously typed text. I'd be willing to say that I've never typed a document that I didn't have to move around in during and after the original composition process, and I would hazard a guess that you won't either. With this inevitable need to move around in a document in mind, it's important to understand the best ways to get from where you are now to where you want to be.

Word provides two methods for navigating a document: via the keyboard, using your arrow keys and a few easily remembered keyboard shortcuts, and via your mouse. You can use whichever method suits a particular situation; sometimes using the keyboard and mouse in concert will have the appropriate navigational effect.

Moving Around with the Mouse

Because Word invites you to work with your mouse to click toolbar buttons, access menus, and click links in the task panes, you probably have become very mouse oriented in your communication with the computer. If using the mouse is your default tool for invoking commands, you'll like these navigational techniques:

- Click to position your cursor anywhere in the text.
- If you want to position your cursor on a blank page, look for the Click and Type mouse pointer. Click and Type allows you to place your cursor anywhere on a blank page, even below the last blank line inserted by ENTER. Double-click to position your cursor.
- Drag the scroll bar. As you drag the scroll box up and down within the scroll bar, the page numbers appear in a ScreenTip. When the page you want appears in the tip, release the mouse. This technique is especially effective when you're in Print Layout view.
- Use the Next Page and Previous Page buttons at the foot of the vertical scroll bar. If the triangles on the buttons are blue (not their default, black), click the Select Browse Object button and choose Browse by Page from the palette of objects. (For more on documents that have many pages, see Chapter 7.)

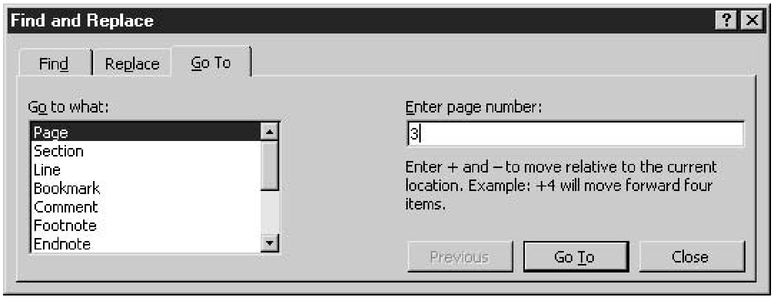


TIP *If you want to move through your document by something other than pages, use the other Browse By options in the Select Browse Object palette. You can leaf through a document by tables, sections, comments, pictures, fields—anything. The safest choice for basic documents is by page, however, because your document might not contain many of the other Browse By elements.*

Keyboard Navigation Techniques

Even for the most mouse-oriented user, it's very quick and easy to move around in your document using the keyboard. Consider the following keyboard shortcuts to take your cursor from point A to point B in no time at all:

- CTRL-HOME moves your cursor to the very beginning of the document.
- CTRL-END takes you to the very end of your document.
- HOME takes you to the beginning of the line you're on. Note that I didn't say beginning of the *sentence*, but the beginning of the line.
- END takes you to the end of the line you're on.
- Use the LEFT ARROW and RIGHT ARROW keys to move one character at a time, left and right.
- Press CTRL as you press the LEFT ARROW and RIGHT ARROW keys, and you'll move word by word instead of character by character.
- Use the UP ARROW and DOWN ARROW keys to move one line at a time, up and down in the document.
- Press CTRL as you press the UP ARROW and DOWN ARROW keys, and you'll move by paragraph instead of by line. Of course, if you have blank lines between paragraphs, created by pressing ENTER, this keyboard shortcut will stop on those individual blank lines because they're each, technically, a paragraph.
- Press PAGE UP to move up one screenful of text.
- Press PAGE DOWN to move down one screenful of text.
- Press CTRL-G or F5 to open the Find and Replace dialog box with the Go To tab in front (see Figure 4-5). This allows you to enter a page number to "go to" in the Enter Page Number text box. Enter a number and press ENTER, and your cursor goes to the top of that page. The dialog box stays open, and you can close it when you don't need it anymore by pressing ESC (escape). This is probably the longest way around the barn for short documents, but if you want to go from page 5 to page 55, it's probably the most efficient way to get there.



Go to what: Page

Enter page number: 3

Enter + and – to move relative to the current location. Example: +4 will move forward four items.

FIGURE 4-5 Type a page number in the Enter Page Number box and press ENTER to go to that page.

Selecting and Working with Text

Before you can do anything with the text in your document—delete it, edit it, copy or cut it to another file, or format it—you need to select it. If you're not a big fan of the mouse, relax; you can use keyboard techniques instead. If you love the mouse and rarely let go of it except to type content into your document, you'll be happy to know that there are quick and easy ways to use the mouse to select text and that you can combine the keyboard and the mouse to make and adjust text selections. Your options are virtually unlimited.

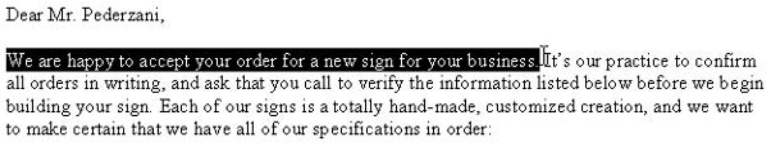
Selecting Text via the Keyboard

Just as you can move your cursor with the keyboard, you can select text with the keyboard, too. The key that takes you from moving to selecting is right there, under your finger: SHIFT! Try these techniques for selecting text with your keyboard:

- Press and hold SHIFT as you click the arrow keys. If you're using the UP ARROW and DOWN ARROW keys, you'll select lines of text. If you're using the LEFT ARROW and RIGHT ARROW keys, you'll select text letter by letter. Press CTRL at the same time to accelerate the process: You can select whole paragraphs (CTRL-SHIFT-UP/DOWN ARROW), or whole words (CTRL-SHIFT-LEFT/RIGHT ARROW).
- To select the rest of your document (from the cursor to the end), press CTRL-SHIFT-END.
- To select the previous portions of your document (from the cursor to the beginning), press CTRL-SHIFT-HOME.
- Press SHIFT-END to select the line you're on, from the cursor to the end of the line.
- Press SHIFT-HOME to select the line you're on, from the cursor to the beginning of the line.
- SHIFT-PAGE UP will select from the cursor to the top of the page you're on.
- SHIFT-PAGE DOWN will select from the cursor to the end of the page you're on.
- To augment an existing selection (whether it was selected by keyboard or mouse), press and hold SHIFT and click with your mouse after the last word that should have been included in your selection.
- To reduce an existing selection, press and hold SHIFT and click where the selection should have ended.
- Press CTRL-A to select the entire document.

Using Your Mouse to Select Text

The mouse can be used to drag through text if you want a phrase within a sentence or a sentence within a paragraph. You can click to place your mouse where you want to begin your selection and then drag to the end, or you can work backward, starting at the end. It's your call, and it all depends on what's the most comfortable and effective method for you. As shown here, you can select anything from a single character to a long string of text.



Dear Mr. Pederzani,

We are happy to accept your order for a new sign for your business. It's our practice to confirm all orders in writing, and ask that you call to verify the information listed below before we begin building your sign. Each of our signs is a totally hand-made, customized creation, and we want to make certain that we have all of our specifications in order:

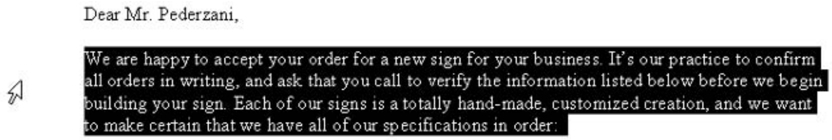
TIP *Word won't let you start or stop your selection in the middle of a word or just select the first letter? If so, choose Tools | Options, and on the Edit tab of the Options dialog box, turn off the When Selecting, Automatically Select Entire Word option by clicking the check box next to it to remove the check mark. This option is on by default, but it's one of the first things I turn off when I install Word.*

What happens if you drag and get more or less than you wanted? It's very common, especially when selecting within a paragraph, to accidentally get the line above or below the text you wanted, or to select text beyond where you wanted to end your selection. It's also possible to let go of the mouse button too soon and not get everything you wanted. In that last sentence is the solution to this problem, no matter how it manifests itself: Don't let go of the mouse until you have the exact selection you want.

If you're dragging through a paragraph to select a couple of sentences, it's very easy to stray up or down slightly with your mouse and suddenly have selected lines or even paragraphs above or below what you wanted. When this occurs, simply leave your mouse button depressed and drag back into the range you wanted, even going back to the beginning of the intended selection and starting your selection process over. As long as you don't let go of the mouse button, the selection will follow you, increasing or reducing the amount of text selected as you drag your mouse left or right, up or down.

Sometimes, the amount of text you need to select lends itself to some very convenient mouse alternatives to the dragging technique. Here's a list:

- To select a single word, double-click the word.
- If you want to select an entire paragraph, triple-click anywhere within the paragraph.
- Double-click in the left margin next to any paragraph you want to select. As shown here, when you're in the left margin for the purposes of text selection, your mouse will turn to a right-pointing arrow.



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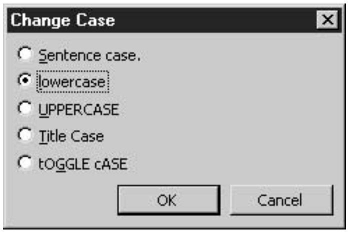
- Triple-click in the left margin anywhere in your document to select the entire document.

Editing Your Text

Nobody's perfect. Let's get that stated now. No matter how fast and accurate a typist you are, you're going to make mistakes. Even if you don't make any on your own, you may find out that what you typed isn't what was wanted, or that the paragraph on page 3 belonged on page 5, and the man's name on page 7 isn't spelled the way you were told it was. If you're like I am, you probably make a lot of mistakes on your own, transposing letters, leaving out words, repeating words, even finding stupidly complex ways to explain something simple. All these things will require editing, whether you're lucky enough to have a proofreader or you go back over your text later to check it.

Editing text is easy enough, using what you've learned earlier in this chapter about selecting text with the keyboard and mouse and adding BACKSPACE and DELETE to your repertoire. Here are some editing techniques to master (don't worry, they're simple):

- To replace a word with another word, double-click the existing word and type the new word. No need to delete the first word and then type its replacement. Whatever's selected when you start typing will be replaced by what you type. It doesn't matter if the original word and its replacement are of different lengths.
- To change the case of text (for example, UPPERCASE, Title Case, Sentence case, or lowercase), select the text and press SHIFT-F3. As you hold down SHIFT and press F3, your text will cycle through various cases. When the case you want is applied, release SHIFT. You can also choose Format | Change Case after selecting the text you want to change. The resulting dialog box appears:



Change Case

○ Sentence case.
● lowercase
○ UPPERCASE
○ Title Case
○ tOGGLE cASE

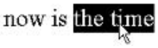
- To get rid of text, select it and press DELETE.
- To make minor changes within a word or phrase, use BACKSPACE and DELETE. Remember that BACKSPACE goes back through your text, removing text to the left of the cursor. DELETE removes text to the right of your cursor, one character per keypress.
- If you want to get rid of text one word at a time, use CTRL plus BACKSPACE or DELETE. You'll delete whole words at a time to the left of the cursor (CTRL-BACKSPACE) or to the right of the cursor (CTRL-DELETE).

Rearranging Words, Sentences, and Paragraphs

One of Word's most convenient tools is Drag and Drop. As mentioned in Chapter 2, Drag and Drop makes it possible to avoid the whole cut-and-paste process and simply drag something from where it is to where it should be. The only limitation? It works best when both the current location and the desired location are both visible at the same time (on the same page or section thereof). If you want to move something from page 2 to page 5, it's better to use Edit | Cut to remove it and Edit| Paste to put it where it belongs.

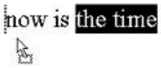
To use Drag and Drop, follow these steps:

1. Select the text to be moved. You can select it with the mouse or the keyboard.
2. If you used your mouse to select the text, make sure to release the mouse button after finishing the selection.
3. Point back to (but don't click) the selection. Your mouse pointer turns to an arrow:



now is the time

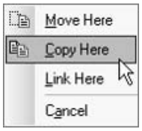
4. Depress and hold the mouse button and then drag the text to the desired location. A small vertical line (the Drag and Drop cursor) will follow you as you drag:



now is the time

5. When the Drag and Drop cursor is where you want to insert the dragged text, release the mouse.

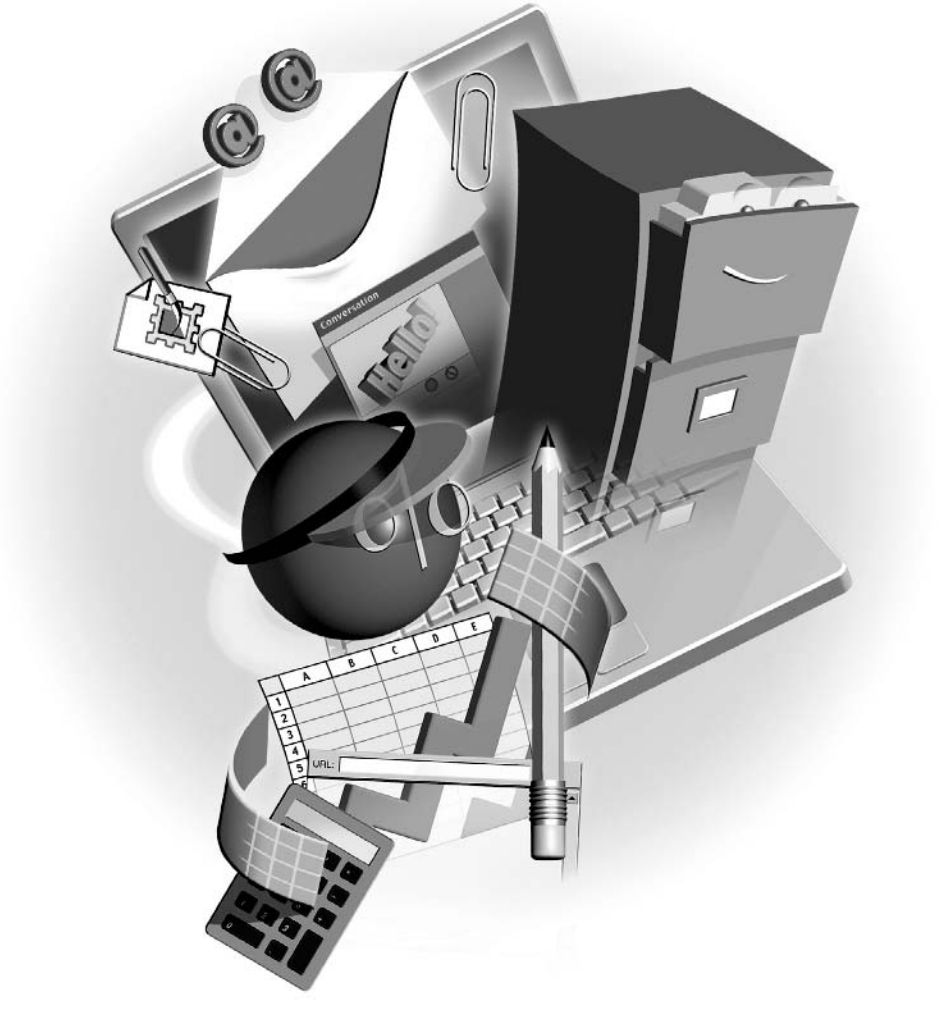
There are times when you want to repeat text in several spots on the same page and you want a quick method (quicker than Edit | Copy and repeated Paste commands, anyway) to make sure the same text appears in each spot. You can use Drag and Drop in these situations as well, with one minor adjustment: Press CTRL as you drag, and release the mouse before you release CTRL. A plus sign (+) will follow as you drag, and as long as you don't release CTRL before you release the mouse (when you've reached the desired location to drop the text), you'll deposit a copy. You can also skip using CTRL by dragging the selection with the right mouse button. When you release the mouse at the desired spot, a shortcut menu appears, as shown here. Choose Copy Here from the menu, and the copy appears in place.



TIP *If your document is more than one page long, you wouldn't consider it to be a long document, but it becomes a candidate for page numbers (on the second and any subsequent pages) and possibly headers and footers. To find out more about such things, check out Chapter 7, which covers several topics related to longer documents and their special needs.*

Chapter 5

Proofing, Printing, and Saving Documents


Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
URL:

How to…

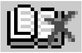
- Check and correct spelling errors as you type
- Run a full spelling and grammar check on your document
- Print your entire document
- Print specific pages and ranges of your document
- Save a file for the first time
- Resave a file to change its name or location
- Save a document as a template to use in building future documents

Nobody's perfect. You're going to misspell words, transpose letters in words, leave words out of sentences, and generally mess up as you type your documents. (I once ended a letter with, "If you have any questions, please hesitate to call.") Word will waste no time pointing out your errors. It checks your spelling and grammar as you type and gives you quick and easy ways to fix them, or to skip its suggestions if you know you're right. Word's spelling- and grammar-checking tools aren't always perfect, though. Therefore, you may want to make them match your needs more exactly by customizing the way they work.

In this chapter, you'll learn to proof your documents, and once they're as perfect as they can be, to print and save them. You'll also learn how to save certain documents as templates, which will help you consistently and quickly create similar documents in the future.

Proofing Word Documents

The most obvious thing about Word's proofing tools is that they're working all the time. As you build your document, if you type a word that's not in Word's internal dictionary (really just a list of letter combinations that we think of as words, nothing like the dictionary we'd use to look up word definitions), it is immediately underlined with a red, wavy line.



Notice that little book icon down on the status bar? It only appears when there's text in your document, and it either has a red check mark or a red X on it. When the book has a check mark on it, the document contains no spelling errors or the user has directed Word to ignore any errors found. If a red X appears on the book, the document contains unresolved spelling errors. You'll see the book's pages flipping as Word checks the text as you type, looking for errors in the text you're adding to or editing in the document.

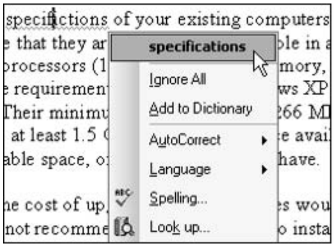
Green, wavy underlines indicate a grammatical error, which is more often than not an extra space between words or a missing period at the end of a sentence. It doesn't always mean you've committed some egregious error such as saying "nobody got none." If you want to ignore the grammatical error indicators, too, you can. Word will stop and deal with each one later if you decide to run the spelling and grammar check.

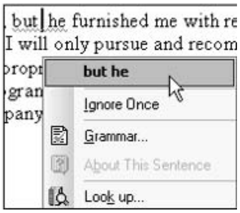
It's important to remember that not everything that's underlined in red or green is really a mistake. It could be Word's mistake in flagging the item. Word could be applying too formal a set of standards to your document, or in the case of spelling, the word in question could be someone's name or an esoteric term that Word just doesn't have in its internal dictionary.

Handling Errors as You Type

As stated, Word is checking your text as you type it, looking for misspellings and grammatical errors. This feature is on by default but can be turned off. I don't recommend turning it off, however, because one of the best reminders to run the main spelling and grammar check is the sight of red or green wavy underlines in your document; it will keep you from printing and perhaps mailing a document containing errors.

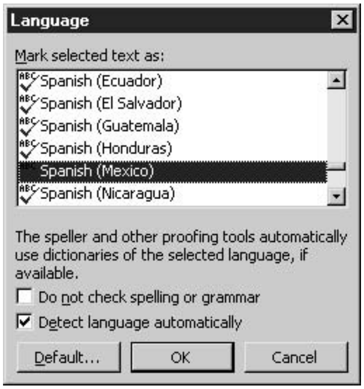
If you choose to resolve the errors as they're pointed out, it's easy to do so. Right-click the underlined text and view Word's suggested corrections on the shortcut menu that appears. Here are examples of spelling and grammar errors.





In the case of some spelling errors, Word will make multiple suggestions based on the spelling you typed. For example, if you type "ogrange," Word will suggest "orange," "grange," and "oranges." These alternatives are based on the number of letters, starting letters, and letter combinations in the word as you spelled it. If the word you wanted to type (in this case, orange) appears in the list of suggestions, click it and Word will replace your error with that word. Here are some other options offered through the shortcut menu:

- If you know that the word is spelled correctly—perhaps it's a name or term—you can choose Ignore All from the shortcut menu.
- Ignore All is good only for this document and for this round of spell checking. If you know the word is spelled correctly and don't want to be flagged for using it in future documents, click Add to Dictionary to add it to the list of words that Word uses to verify the spelling in your document.
- If the word you typed is in a foreign language (for example, if your default language is English, you might be flagged for typing *muchas gracias* instead of "thank you," or *ciao* instead of "good bye." If you're not sure of your spelling of the foreign word(s), you can switch to another language and verify (or correct) the spelling by choosing Language | Set Language. In the resulting Language dialog box (see Figure 5-1), scroll to select the language you want to do your spell check in and click OK. Once you've checked the foreign word (using the same spell-checking procedures used for your default language), repeat this process to return to the language the rest of your document is typed in.



The speller and other proofing tools automatically use dictionaries of the selected language, if available.

☐ Do not check spelling or grammar

☑ Detect language automatically

FIGURE 5-1 Want to make sure your spelling is *muy bien*? Switch to Spanish and verify your spelling of a foreign word or words in your document.

- If you'd prefer to have Word show you each error in a dialog box, choose Spelling from the shortcut menu. The Spelling and Grammar dialog box opens offering you the options Ignore, Ignore All, Add to Dictionary, and Change for a selected suggested correction. If you feel you've made the same mistake in other places in the same document, click Change All to fix all instances without having to stop and deal with them individually.

Running the Spelling and Grammar Check

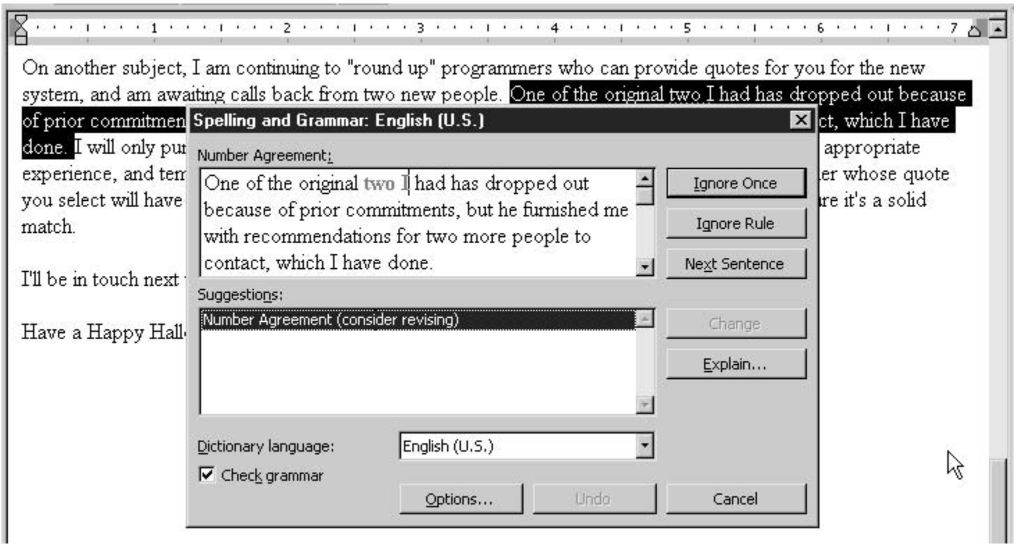
The full spelling- and grammar-checking process is invoked by choosing Tools | Spelling and Grammar or by clicking the Spelling and Grammar button on the Standard toolbar. You can also press F7 to start it if you like to use keyboard shortcuts.

Once the spelling- and grammar-checking process begins, any errors in your document (or errors as perceived by Word) will appear in the top text box in the Spelling and Grammar dialog box (see Figure 5-2). If the error involves spelling, the error will appear in context, with the error itself in red. If the error is grammatical (or a problem with spacing or capitalization), the error will appear in green.

As you deal with each presented error (by clicking the Ignore, Add, or Change button), Word will move through the document, until no more errors are found. When there are no more errors, a prompt appears, telling you that the spelling and grammar check is complete.

It's best to start your spelling and grammar check at the beginning of your document (with your cursor at the top of the first page) so that you know the entire document is checked and Word doesn't have to ask if you want to check the whole thing. For example, if you have text selected at the time you issue the command to start the check, Word will check the selected section and then display a message box asking if you want to continue checking the rest of the document.

Another good reason to start your check with your cursor at the top of the document is that working from start to finish makes it easier for you to make judgment calls depending on where the error is in the document.



On another subject, I am continuing to "round up" programmers who can provide quotes for you for the new
system, and am awaiting calls back from two new people. One of the original two I had has dropped out because
of prior commitmen ct, which I have
done. I will only pur appropriate
experience, and ten er whose quote
you select will have re it's a solid
match.

I'll be in touch next

Have a Happy Hall

Spelling and Grammar: English (U.S.)

Number Agreement:

One of the original two I had has dropped out because of prior commitments, but he furnished me with recommendations for two more people to contact, which I have done.

Suggestions:

Number Agreement (consider revising)

Dictionary language: English (U.S.)

☑ Check grammar

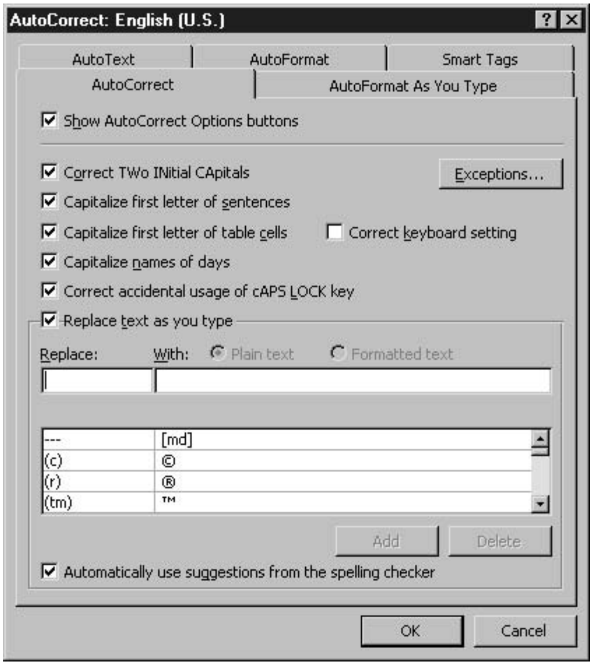
FIGURE 5-2 The Spelling and Grammar dialog box shows errors, in context, so you can see where and how you used a word or phrase before deciding how, or if, to correct it.

Making Automatic Corrections

One of the options in both the shortcut menu you see when you right-click an underlined word and in the Spelling and Grammar dialog box is AutoCorrect. AutoCorrect is an extremely powerful and convenient feature, and it's available in Word, Excel, and PowerPoint, so your actions within Word (customizing its use, adding to its tasks) will affect the way it works in the other applications as well.

Along with the spelling and grammar checking that occurs as you type, AutoCorrect is working as you enter your document text, fixing common misspellings and transpositions, and turning combinations of punctuation marks into symbols. For example, if you type "adn," Word will automatically change it to "and." If you type a colon, a hyphen, and a right parenthesis (in that order, with no spaces between them), Word will change it to a smiley-face symbol. You can view all the AutoCorrect actions and settings by choosing Tools | AutoCorrect Options. Here's a list of some other things that AutoCorrect does for you, as shown in Figure 5-3.

- **Corrects two initial capitals** If you hold down SHIFT too long when capitalizing the first letter of a word, "THank you" becomes "Thank you."
- **Capitalizes the first letter of sentences** If you often forget to capitalize your sentences, this feature will be a real timesaver. Word assumes you're starting a new sentence whenever you type a period followed by a space, press ENTER, or begin typing on a brand new document.



☑ Show AutoCorrect Options buttons

☑ Correct TWo INitial CApitals

☑ Capitalize first letter of sentences

☑ Capitalize first letter of table cells

☐ Correct keyboard setting

☑ Capitalize names of days

☑ Correct accidental usage of cAPS LOCK key

☑ Replace text as you type

Replace: With: ● Plain text ○ Formatted text

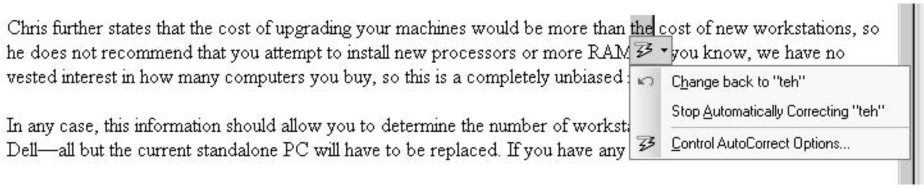
Replace	With
---	[md]
(c)	©
(r)	®
(tm)	™

☑ Automatically use suggestions from the spelling checker

FIGURE 5-3 All the AutoCorrect actions are on by default, but you can turn any of them off if they're inconvenient.

- **Capitalizes the first letter of text in table cells** Because each table cell's first word is normally the beginning of a sentence, Word assumes you want these words capitalized.
- **Capitalizes the names of days of the week** People often forget that the days of the week should be capitalized, but Word won't forget.
- **Corrects accidental use of CAPS LOCK** If you press CAPS LOCK and then SHIFT while typing the next word in your document, Word will assume you didn't mean to be in CAPS LOCK mode and will reverse all the upper- and lowercase letters in that word.

The option Show AutoCorrect Option Buttons appears at the top of the AutoCorrect dialog box and refers to the little blue icon that appears whenever AutoCorrect makes a correction. If you put your mouse over the icon, a drop-down arrow button appears. If you click it, you can choose to undo the correction (as shown next) and turn off any automatic corrections related to the text that was corrected. You can also choose Control AutoCorrect Options to open the AutoCorrect dialog box.


Chris further states that the cost of upgrading your machines would be more than the cost of new workstations, so he does not recommend that you attempt to install new processors or more RAM you know, we have no vested interest in how many computers you buy, so this is a completely unbiased

In any case, this information should allow you to determine the number of workst Dell—all but the current standalone PC will have to be replaced. If you have any

Change back to "teh"
Stop Automatically Correcting "teh"
Control AutoCorrect Options...

Creating AutoCorrect Entries

Beyond the built-in list of hundreds of common misspellings and transposition errors, AutoCorrect can be made more powerful by you adding your own entries—words you misspell, letters you transpose frequently, and abbreviations for things you get tired of typing in their full form. For example, I often type “int he” instead of “in the.” I got tired of having the error flagged as a spelling error every time, so I added the incorrect version (“int he”) to AutoCorrect, paired with the correct spelling of the pair of words. Now whenever I make the mistake, Word has fixed it before I even realize I’ve made the error.

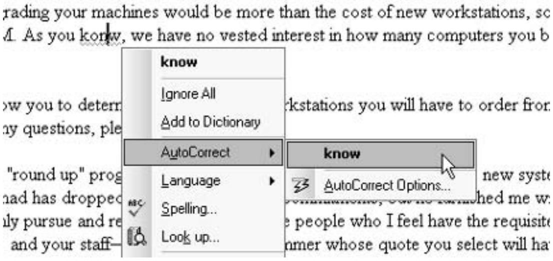
Storing abbreviations is a great way to use AutoCorrect. I’ve built in several that help me write books, such as the one you’re reading now. For example, I built in “db” to be replaced by “dialog box,” and “rc” becomes “right-click.”

TIP *Make sure your AutoCorrect trigger (the misspelling or abbreviated form) isn’t a real word or an acronym/abbreviation that you may want to use in that form in the future. For example, if your name is Ann Smith, you don’t want your trigger to be “as”, because that’s a word. If you’re building in an abbreviation that you’d also like to be able to type as initials (such as PETA, which would flesh out to People for the Ethical Treatment of Animals), build your entry as “PETA1,” and only that will trigger the whole organization name.*

To create an AutoText entry, follow these steps:

1. Choose Tools | AutoCorrect Options. The AutoCorrect dialog box opens (refer to Figure 5-3).
2. Your cursor should be blinking inside the Replace text box by default, but if it isn’t, click inside that box.
3. Type the error you want fixed or the abbreviation you want fleshed out.
4. Press TAB to move to the With box, or just click inside that box to position your cursor.
5. Type the correction or full version of the abbreviation. Be sure to type it exactly as you want it to appear in the document. Make sure you spell it correctly and use the capitalization you want Word to use.
6. Click Add.
7. Repeat steps 1 through 6 for any other entries you want to build. Then click OK to close the dialog box.

If you want to add a misspelling to AutoCorrect, creating an instant pairing of the error and its suggested creation, choose AutoCorrect from the shortcut menu that appears when you right-click a flagged (underlined in red) word. When you choose AutoCorrect from the shortcut menu, a submenu appears offering the same suggested corrections seen in the main shortcut menu (shown here). When you make a selection from this AutoCorrect submenu, the selection and the error it corrects are automatically stored as a new AutoCorrect entry and will be used the next time you make the same error.



Editing and Removing AutoCorrect Entries

Imagine you've built an AutoCorrect entry that you now want to change. You can edit the entry you made or you can delete the entire entry and start over. Deleting is also handy if you want to get rid of an entry—maybe you realize the trigger is a word you need to be able to type without Word tinkering with it.

To edit an AutoCorrect entry, follow these steps:

1. Choose Tools | AutoCorrect Options.
2. In the AutoCorrect dialog box, type the first letter of the "replace" text (your error or trigger), and the list of stored entries moves to the first one starting with that same letter. Scroll around to find your entry and select it, or continue typing until the entire entry appears in the box. Its correction appears automatically in the With box.
3. In the Replace and/or With box, edit the entry to meet your needs.
4. Click the Replace button.
5. A prompt appears, asking you to confirm your intention to redefine the entry. If you want to do so, click Yes.
6. Repeat steps 1 through 5 for any other entries you need to edit.
7. Click OK to close the dialog box.

Deleting an AutoCorrect entry uses the same procedure, except that in step 4, you click the Delete button. There is no confirming prompt to make sure you want to make the deletion, so be sure you've selected the right entry before you click the Delete button.

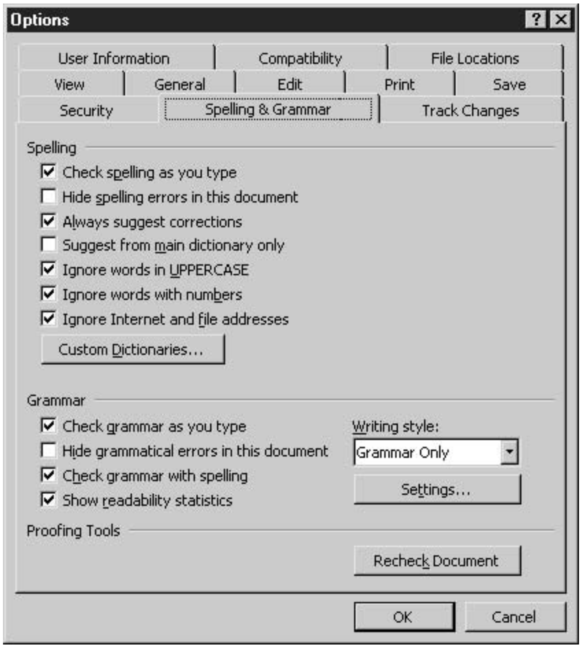
Customizing the Proofing Tools

Word's proofing tools aren't any more perfect than you are. Yes, the spell checker will infallibly check every word you type against its internal word list, but words might not be on that list because they're legal, medical, or some other industries' terminology. The grammar checker sometimes makes suggestions for changing a word or rearranging your text that would completely change the meaning of your text—and not for the better. In these cases, you can ignore the suggestions, or if this happens too frequently, you can adjust the proofing tools to better meet your needs.

When it comes to spelling, you can add words to the dictionary. When you add a word, you're storing it in your personal dictionary, a separate word list that is built by your additions. This list is checked, along with the main dictionary, against all text in your document. Of course, to add to this list, click the Add to Dictionary button in the spelling shortcut menu or the Spelling and Grammar dialog box.

Customizing the Spell-Checking Process

Word's spelling tools can also be customized by using the Spelling and Grammar Options dialog box. Choose Tools | Options and click the Spelling and Grammar tab in the Options dialog box. You can also click the Options button in the Spelling and Grammar dialog box. In either case, the options shown in Figure 5-4 appear, and you can turn them on and off to customize when and how Word checks your text for spelling errors.



Spelling

☑ Check spelling as you type
☐ Hide spelling errors in this document
☑ Always suggest corrections
☐ Suggest from main dictionary only
☑ Ignore words in UPPERCASE
☑ Ignore words with numbers
☑ Ignore Internet and file addresses

Grammar

☑ Check grammar as you type
☐ Hide grammatical errors in this document
☑ Check grammar with spelling
☑ Show readability statistics

Writing style: Grammar Only

Proofing Tools

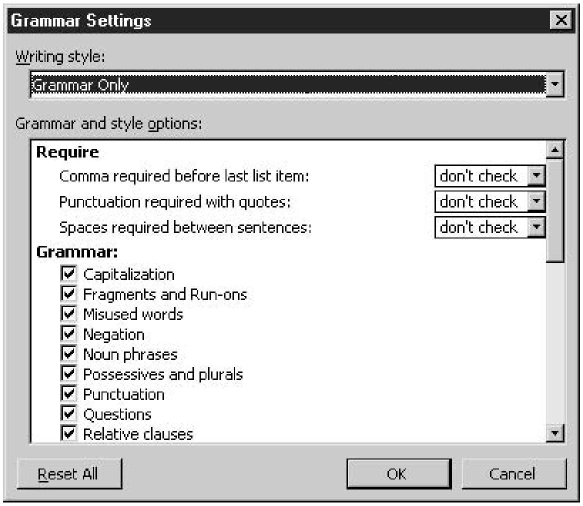
FIGURE 5-4 The settings shown here are the defaults. You can change them as needed by removing check marks next to any unwanted actions.

Adjusting the Standards for Grammar Checking

If you work for a very conservative, formal organization or write to clients who might fall into the “serious” category, your grammar checking should be very thorough, allowing no colloquialisms, fragments, run-on sentences, or uses of any inappropriate tense to make it through the grammatical filter. You shouldn’t be allowed to end a sentence with a preposition or use a split infinitive without the error being flagged.

On the other hand, if you work for or write to a more informal crowd, where comfort and clarity is more important than absolute correctness, you might want to loosen the grammatical grip Word has on your text and allow a few errors to slip under the radar. Whether you want Word to be more informal or more exacting in its grammar checking, the customization steps are as follows:

1. Choose Tools | Options and click the Spelling and Grammar tab. You can also click Options in the Spelling and Grammar dialog box.
2. In the Grammar section of the dialog box, click the Settings button to bring up the Grammar Settings dialog box (see Figure 5-5).
3. Adjust the Writing Style option in the resulting Grammar Settings dialog box to check your grammar only or to check your grammar and style.
4. Scroll through the Grammar and Style options and turn on any desired options and turn off any that you no longer want applied to your text.
5. Click OK to close the dialog box and save your changes.
6. Click OK to close the Spelling and Grammar Options dialog box.



Writing style: Grammar Only

Grammar and style options:

Require

Comma required before last list item: don't check
Punctuation required with quotes: don't check
Spaces required between sentences: don't check

Grammar:

☑ Capitalization
☑ Fragments and Run-ons
☑ Misused words
☑ Negation
☑ Noun phrases
☑ Possessives and plurals
☑ Punctuation
☑ Questions
☑ Relative clauses

FIGURE 5-5 See just what sort of grammatical rules Word is applying to your documents.

Turning As-You-Type Proofing On and Off

If you find the red and green underlines annoying to look at and know you'd never forget to run the full spelling and grammar check in their absence, you can turn them off. You can turn either or both of them off, or you can simply hide the errors in a particular document but leave the checking on and visible in all other documents.

To adjust how (or if) the spelling and grammar checking is performed as you type, choose Tools | Options and then click the Spelling and Grammar tab in the Options dialog box. You can also click the Options button in the Spelling and Grammar dialog box.

- If you want to turn off the Check Spelling as You Type option, click the check box to remove the check mark.
- If you want spelling to be checked as you type but want to hide the underlines in the active document, click to place a check mark in the box next to Hide Spelling Errors in This Document.
- If you don't want grammar to be checked as you type, click to remove the check mark next to Check Grammar as You Type.
- If you want grammar checking to continue but don't want to see the green underlines in the active document, leave Check Grammar as You Type on but place a check mark next to Hide Grammatical Errors in This Document.

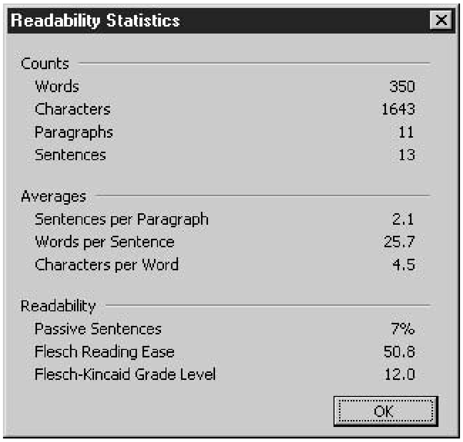
Once you've made your choices, click OK to save your changes and close the dialog box.

Viewing Your Document's Readability Statistics

If you're writing to a particular audience and you know the educational level of that audience, you can view your readability statistics at the end of each spelling- and grammar-check session.

Readability is measured by three standards: how easy the document is to read, at which grade level it is written, and the number of sentences in the passive voice ("When you click OK, a dialog box will open" rather than "Click OK to open the dialog box"). The readability statistics are based on existing measurement tools, developed to help writers match their style to their audience. You needn't be an expert in this topic to use the statistics—suffice it to say, the lower the level of education your audience has, the lower the statistic numbers should be. For example, if your audience contains many people who are not well educated, you want to aim for a Flesch-Kincaid Grade Level below 9 so that people who didn't attend high school (or the equivalent) won't have problems with your text.

To view a document's readability statistics, choose Show Readability Statistics in the Grammar section on the Spelling and Grammar tab of the Options dialog box and then click OK. The next time you run a full spelling and grammar check, the process will end with a display that shows the word, character, paragraph, and sentence counts, as well as the average number of sentences per paragraph, words per sentence, and characters per word, which can indicate complex sentences and long words. The statistics for a sample document are shown in Figure 5-6.



Counts

Words	350
Characters	1643
Paragraphs	11
Sentences	13

Averages

Sentences per Paragraph	2.1
Words per Sentence	25.7
Characters per Word	4.5

Readability

Passive Sentences	7%
Flesch Reading Ease	50.8
Flesch-Kincaid Grade Level	12.0

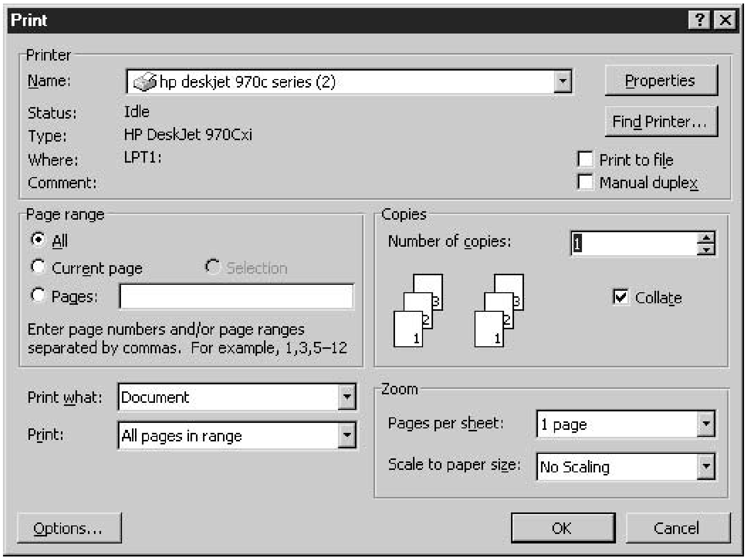
FIGURE 5-6 Don't talk down to a well-educated audience or over the heads of an audience who might not be familiar with your topic.

Printing Your Document

Despite the fact that more and more documents are viewed onscreen and online rather than on paper, you will need to print a document from time to time. I find it easier to read longer documents on paper and to do my final proofing on a printed version of my document rather than reading and looking for errors onscreen. I'm not sure why this is, but I'm not alone. Whether you're printing out a document for review, to send to someone, or for photocopying purposes, Word makes the printing process quick and easy. You have three alternatives, most of which work interchangeably:

- *Click the Print button on the Standard toolbar*. With no questions asked, Word will print one copy of every page of the active document, sending the job to the printer currently set as your default device. If you don't know which printer is set as the default or if you definitely don't want the job to go to one of the printers to which you can potentially print, you might want to skip this method.
- *Choose File | Print*. Misleadingly, this menu command is accompanied by a picture of the Print button from the toolbar. The command and the button don't work exactly the same way, however. When you choose File | Print, the Print dialog box opens (see Figure 5-7), through which you can choose a different printer, set the number of copies to print, and choose to print only certain pages of the document.
- *Press CTRL-P*. This keyboard shortcut is the equivalent of the File | Print command and opens the Print dialog box.

Obviously, the Print button is only a good alternative if you have a very short document (and therefore don't mind printing all the pages) or if no matter how many pages your document has,



Name: hp deskjet 970c series (2)
Status: Idle
Type: HP DeskJet 970Cxi
Where: LPT1:
Comment:
☐ Print to file
☐ Manual duplex

● All
○ Current page
○ Selection
○ Pages:
Enter page numbers and/or page ranges separated by commas. For example, 1,3,5–12

Number of copies: 1
☑ Collate

Print what: Document
Print: All pages in range

Pages per sheet: 1 page
Scale to paper size: No Scaling

FIGURE 5-7 Control everything from the number of copies to the selection of pages printed through the Print dialog box.

you want to print one copy of each one. If you want to control the print job in any way, you need to work with the Print dialog box. Here are some controls to consider:

- **Printing only selected text** If you select the text you want to print—say, a series of paragraphs that span two pages—before opening the Print dialog box, you can click the Selection option in the Page Range section. The only thing to print will be the text you selected prior to issuing the File | Print command.
- **Printing only odd or even pages** If you're going to print on both sides of the paper and bind the document, you can choose to print just the odd pages and then put them back in the printer and print the even pages. Click the Print drop-down list in the lower-left corner of the dialog box and choose Odd Pages or Even Pages.
- **Printing more than one page per sheet** If you want to print several pages on a single sheet of paper—perhaps for the purposes of reviewing the layout of multiple pages—click the Pages per Sheet drop-down list in the Zoom section of the dialog box. Bear in mind that you might end up with tiny text that no one can read, but printing multiple pages per sheet will allow you to review the layout of your document on one handy sheet.

TIP

If your printer doesn't do duplex printing (printing on both sides of the paper automatically), you can click the Manual Duplex option in the Printer section of the Print dialog box. After the odd-numbered pages have been printed, Word will prompt you to refeed the paper upside down so that the even pages can be printed.

Saving Word Documents

There are two words you need to remember with regard to saving your documents: early and often. Save your documents as soon as you get started, and continue saving every five or ten minutes. In fact, you should save your document after each of the following events:

- Checking the spelling
- Formatting the document text
- Editing
- Typing more than a couple of sentences

Now, you're probably wondering why on earth you'd need to save so often, and why I'd possibly suggest something so potentially time-consuming as a frequent action. The answer is to save you from losing your work. The time it takes to save your document is miniscule compared to the time you'll waste rebuilding a document that you lose to the application crashing, your computer shutting down, or a power failure. If you've been typing, formatting, and editing for an hour without saving, or if the computer or Word shuts down before you have a chance to resave, you'll lose that hour's worth of work, and it invariably takes more than an hour to remember what you did and to do it again.

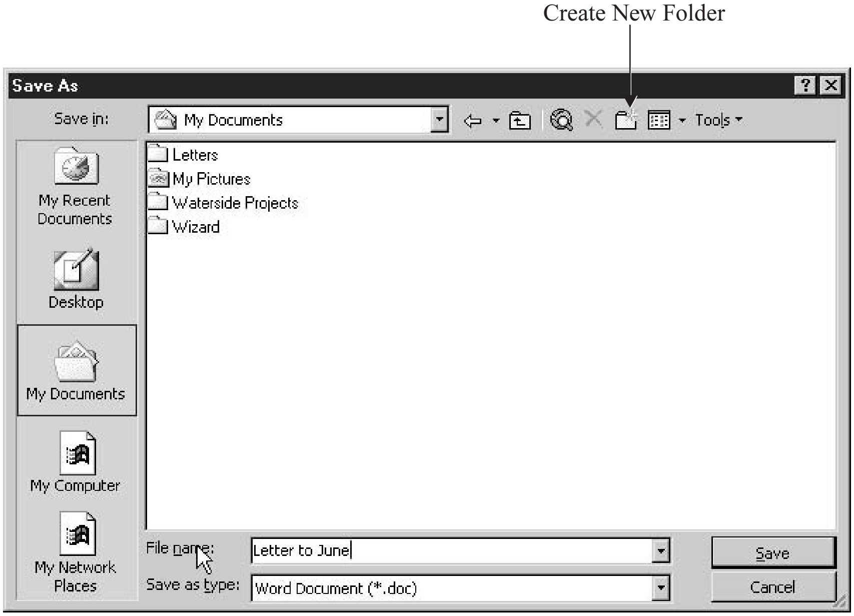
Remember, too, that the process of saving is only time-consuming the first time you do it. The first time you save a document you have to give it a name and choose where to store it. Subsequent saves simply update that file, and it only takes a second—literally—to do it.

TIP *You might have heard about Word's Auto Recovery feature or the "background saves" that Word does every ten minutes by default. These features do not eliminate the need for you to save early and often. If your power goes out or your computer crashes, a recovered version of the file might be available when you reboot and restart Word, but the file will only contain your work as of the last background save, which could have been long before the crash or power outage occurred.*

Performing a First-Time Save

The first time you save a file, by using either the File | Save or File | Save As command (or by clicking the Save button on the Standard toolbar), the Save As dialog box opens. As shown in Figure 5-8, the dialog box defaults to saving your file in the My Documents folder (assuming you haven't changed the default file location setting) and will save your document as a .doc file, the default Word format.

When the dialog box opens, the current document name (the name Word assigns it temporarily, until you give it a name and save it) appears in the Filename box, and is highlighted. To give the file its real name, simply type the name. There's no need to delete the temporary name or click in the File Name box. Because the current generic name is highlighted, the very next thing you type will replace that name. After naming the file, you can choose to save it somewhere other than the My Documents folder. This can be an entirely different folder or a folder within the My Documents



Letters
My Pictures
Waterside Projects
Wizard

File name: Letter to June
Save as type: Word Document (*.doc)

FIGURE 5-8 Word makes it easy to save your file by assuming where you want to store it.

folder. You can also create a new folder to house this document. To save to a different location, follow these steps:

1. In the Save As dialog box, click the drop-down triangle at the end of the Save In text box. A directory of all the possible locations, from your desktop to any network drives you might be attached to, is displayed.
2. Click the drive you want to save to. If you want to save your document to your local hard drive, click C:.
3. When the folders within the selected drive appear in the dialog box, double-click the one you want to save to.
4. If you haven’t already named your document, do so now by selecting the name in the File Name box and typing the new name.
5. Click the Save button in the lower-right corner of the dialog box. The file is saved, and the name you’ve given it appears on the title bar.

To create a new folder for your document, follow these steps:

1. Choose File | Save As. In the Save As dialog box, move to the drive or folder the new folder should be stored in. For example, if your new folder will be a subfolder of My Documents, make sure it says My Documents in the Save In text box.

2. Click the Create New Folder button.
3. The New Folder dialog box opens. Type the name for your new folder (up to 255 characters) in the Name box.
4. Click OK to close the New Folder dialog box.
5. Word automatically creates the new folder and puts your file in it, displaying the new folder in the Save In text box. This is because Word assumes your reason for creating the folder was to save the new file into that folder, so it saves you the step of selecting the new folder manually.
6. If the file is as yet unnamed, type a new name for it in the File Name box.
7. Click the Save button to save the new file into the new folder.

Updating a Saved File

After a file is saved for the first time, each subsequent save is just an update of that file, to add any new text or other content, include any edits or formatting, and generally make sure the file stored on your computer is the same as the one you're looking at onscreen. No dialog box opens, no prompt appears. The file is simply resaved, overwriting the previous version, and you can continue to work. To perform such an update save, simply press CTRL-S. You can also choose File | Save or click the Save button on the Standard toolbar, but I recommend the keyboard shortcut, even to people who aren't normally keyboard-shortcut oriented. It allows you to save your file *and* keep typing so you don't lose your momentum, you don't waste any time, and you don't risk losing your work.

Saving a Document with a New Name

After the first-time save, most documents require only update saves—the saves that update the file to include changes as you continue to work—and that's it. The file is never moved to a new folder, never renamed. This is the ideal situation, of course, because it eliminates extra work, and there's never any doubt what a file is called or where to look for it.

Remember, however, I said "most documents." There are situations where a file needs a new name or needs to be stored in a new place, perhaps an additional location, leaving the original file where it was saved the first time. Perhaps you need to create a second version of the file for someone else, and you want to keep your version for your own use and let the other person do as they please with their version. Perhaps you want to save the file to a network drive so other people can get at it, but you want to leave the original file on your local hard drive for your own use.

Whatever your motivation, it's easy to resave an existing, saved file and give it a new name and/or save it to a new place. Follow these steps:

1. From within the file to be renamed or relocated, choose File | Save As. The Save As dialog box opens, displaying the file's current name and location.
2. To rename the file, simply type a new name in the File Name box. The current name should be highlighted when the dialog box opens, so all you have to do is start typing the new name.

3. To save the file to a new place, click the Save In drop-down list and pick a new drive. If you want to save to the same drive but to a different folder, click the Up One Level button until you're back to the root of the C drive and then select the folder you want to save the file in.
4. With the new location and/or new name displayed in the Save In dialog box, click the Save button. The original file will close, and the new version will remain open for your use until you close it.

If, after creating the new version, you want to go back to the old one, simply close the new version and reopen the old one (it should be the first one listed in the Most Recently Used file list at the foot of the File menu, or on the task pane). The new version can be emailed to the person who needs it, or you can let that person know which network drive the file can be found on. You'll be able to continue working with your own version of the file, unaffected by anyone's use of the new version.

TIP *It's a cruel and complicated world at times—power goes out, computers crash, and files get lost. I like to store copies of the final version of important files in a special folder. This gives me a single location to find important documents and makes it easy to back up these documents. I just drag the folder to the Zip drive (using the Windows Explorer or My Computer window), and the folder and all the documents in it are backed up to my Zip disk. You can do the same thing with a floppy disk, if the files don't exceed disk capacity, or if you have a writeable CD drive, you can write the folder and its files to a CD for safekeeping.*

Creating Document Templates

Templates are perhaps the most underused part of Word's considerable power. People spend hours (probably days or weeks when all the time is added up) creating documents from scratch when a template could have saved them as much as 90 percent of the time spent entering and editing text and then formatting their documents. Templates, if used properly, can also help maintain consistency across a group of people so that the documents created in a single department or throughout an entire company are similar in important ways—fonts, layout, and content.

So what are these wonderful things, these templates? Templates are like cookie cutters for documents. They help you create many similar (or perhaps identical) documents from a single mold. Common examples of templates include fax cover sheets, memos, proposals, reports, and letters. Just about any kind of document can be a template, becoming the foundation for future documents.

Building Template Content

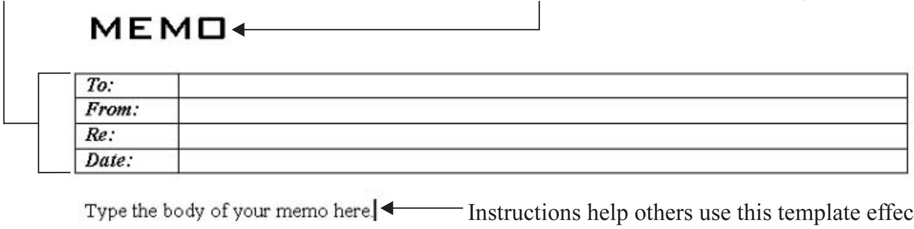
Word allows you to turn any document into a template, simply by choosing the Document Template format for the file when you save it. That's all you need to do. If you choose that format for a document, Word automatically saves the file to a Templates folder, making the resulting template file accessible for use in building new documents later. The process is very simple. Just follow these steps:

1. To build a template from a new document, start with a blank document and build the content and apply the formatting that every document based on this template will need. Don't add anything that's specific to one particular document, such as the date or reference to a particular product or client. Figure 5-9 shows the content you'd want to include in a memo template.
2. Choose File | Save As. In the resulting Save As dialog box, click the Save As Type drop-down list at the bottom of the dialog box and choose Document Template (.dot) from the list of formats. When you select the document template format, Word automatically changes the Save In location to the Templates folder, where existing templates that came with Word are already stored.
3. In the File Name box, type a name for the template that will help you choose it for specific uses later, such as "Standard Memo" (rather than plain old "Memo") or "Quarterly Report" (as opposed to "Report," which isn't very specific).
4. Click the Save button to create the template and close the Save As dialog box.

The template file remains open onscreen, and you can continue to edit and format it as needed. Continue to resave it (in the .dot format) as you make changes and then close the file.

TIP

Never save the template to a folder other than Templates, and to the Templates folder where Word automatically takes you when you choose the Template format. If you save a template to any other folder, it won't be available to you when you choose File | New or click the On My Computer link in the task pane. At most, save the template to one of the Templates folder's subfolders or create your own subfolder within the Templates folder, such as "My Templates." If you create your own subfolder (within the Templates folder), it will appear as a tab in the Templates dialog box, and on that tab you'll find the template you created.



The memo headings are included and placed in a table to control placement of the text.

The word "Memo" has been formatted in a different font and in a larger size.

MEMO

To:	
From:	
Re:	
Date:	

Type the body of your memo here

Instructions help others use this template effectively.

FIGURE 5-9 Think about the future documents you'll create based on this template and only include the text and formats those documents will need.

Creating New Documents from Your Templates

To use the templates you create, simply choose File | New. You can also click the On My Computer link in the task pane to open the Templates dialog box. Within that dialog box, the General tab will contain the templates you've created. Double-click the template you want to use, and a new document opens, containing the content and formatting that was included in the template file. You'll note that the name of the new document is DocumentX (where "X" is the consecutive number assigned to all new documents in Word). Word doesn't open the template itself but rather a new document *based* on that template.

Template Tips and Techniques

The most useful piece of advice I can give you when it comes to templates is to make a lot of them. Any document you create more than once is a good candidate for a template. For example, if you write more than one report per month, you need a template for that report. Why? Because using a template will save you setting up the things that all your reports have in common, such as the name, the layout, the formatting, even some of the data that doesn't change or that changes only slightly.

When building template content, stick to text and other elements (such as tables and graphics) that every document you build based on the template will need. For example, if you're building a memo for meeting agendas, include the headings for each section (for example, Date, Attended By, Topics, Actions, and Follow-Up) but don't type anything specific to any particular or actual meeting. The more generic you can make the content, the more applicable the template will be for future agenda documents. Using tables in a template helps to structure the document by providing cells into which data and text can be entered. (For more on tables, see Chapter 8.) Styles, covered in Chapter 6, can be used to customize the templates' tables.

Another useful feature to build into a document is instructions, which are particularly helpful if people other than you will use your template. This can be as simple as "type your name here" or as detailed and specific as "please enter full department names and avoid using abbreviations whenever possible." The instructions should be obvious, however, so that people see them and replace them with their text, or delete them if they don't have text to insert in that part of the template. Preceding instructions with the word "NOTE" in all caps can help draw attention to instructional text and prevent it accidentally remaining in the document after the user has filled in the parts they need.

TIP *Word comes with an extensive selection of templates, ready for your use. Most of them contain instructions, some use self-running Wizards that coach you through the process of filling in user-specific parts of the template, and some of the templates contain automated features such as fields (for making choices, inserting data). They're all available through the File | New command or by clicking the On My Computer link on the task pane. The templates are divided into several categories, designated by tabs in the dialog box, to help you find the one you need.*

Chapter 6

Effective Document Formatting

Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
6
URL:

How to…

- Change the appearance of text by applying fonts and font sizes
- Use styles to make multiple changes to the appearance and placement of text
- Adjust alignment settings to position headings and justify paragraphs
- Format paragraphs to control the placement and flow of blocks of text
- Adjust margins, paper size, and page orientation
- Use default tabs to create simple column lists
- Create custom tab stops throughout a document

Your document can be formatted on three levels: character formatting, which works with your document at an almost atomic level; paragraph formatting, which works with large sections of text and deals with them as blocks; and page formatting, which allows you to control the appearance of the document as a whole. In this chapter, you'll learn to approach the formatting of your document on all three levels, using easily accessed toolbar buttons, dialog boxes that offer greater levels of control, and keyboard shortcuts to speed the process along. You'll also learn to structure your text with tabs, using both the default tab settings that are part of the Normal (blank document) template and custom tabs that you can set for specific layout requirements.

Changing the Appearance of Text

Text formatting is rather limited. You can change the font (or *typeface*) of text, the size of it, and the color of it. You can make it thicker (bold), you can make it italicized, and you can underline it. Beyond that—indents, margins, and bulleted lists—you're talking about paragraph and page formatting. The formatting of characters is limited to what you can change about the way individual letters and numbers look.

Although what you can change is limited, the ways to make those changes are not. You have the Formatting toolbar, nearly half of which is devoted to character formatting, you have the Font dialog box, and you have keyboard shortcuts. Figure 6-1 shows the Formatting toolbar, with the character-formatting tools individually identified.

The most important thing to remember before making any changes to the appearance of text is that you need to have the text in place and selected (highlighted) before applying any formatting. If you don't have text selected, Word assumes you want the format(s) to apply to the next thing you type at the cursor.

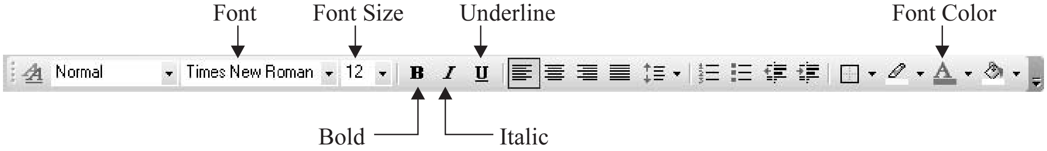


FIGURE 6-1 Pick a font, size, and color, and use the B, I, and U buttons to add emphasis.

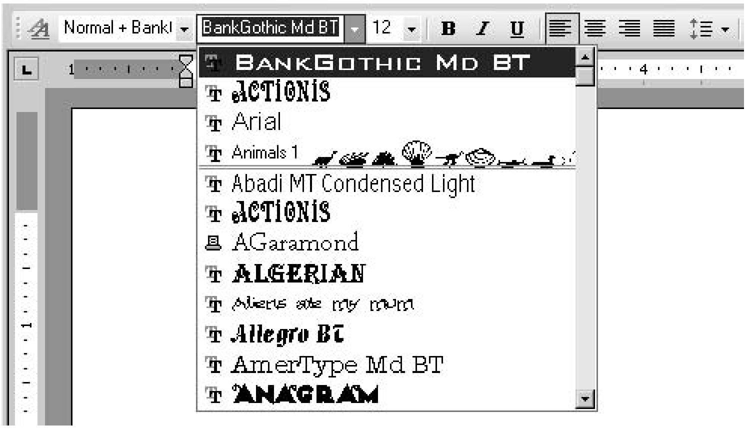
TIP *You can cut your formatting efforts in half by applying formatting after all the text is typed rather than turning the formatting off and on as you go.*

Choosing the Right Font and Size

What's the "right" font and size for your text? That's a subjective question. There are some basic rules for maintaining legibility and an overall pleasing design, but other than that, the choice is up to you.

- For business documents, 12-point text is best. It's large enough to be read, yet it's not so big that it wastes space.
- Times New Roman is clear onscreen and when printed on paper. It's the traditional favorite for business documents and is much clearer and easier on the eyes than Courier (which looks like an old typewriter was involved), and it photocopies better than Arial or Helvetica (which can cause unwanted letter combinations, such as an *r* followed by an *i* looking like an *n).*
- Try not to use more than two fonts per document, and when using two fonts, pick one from each font type. The two types are *serif* and *sans serif.* Serif text has flourishes on the ends of the letters, and sans serif (literally, "without serifs") does not have flourishes. Times New Roman is a serif font; Arial is sans serif.
- If you must use a very fancy font (from the pool generally referred to as *artistic* fonts), use it sparingly, and only on a heading or title.

To adjust the font and size of your text, use the Font and Font Size buttons on the Formatting toolbar. When you click the Font drop list, a list of fonts appears, each graphically represented so you know what the font looks like before you apply it to your text. The most recently used fonts appear first, followed by an alphabetical list.


Normal + Bankl
BankGothic Md BT
12
B
I
U
BankGothic Md BT
ACTIONIS
Arial
Animals 1
Abadi MT Condensed Light
ACTIONIS
AGaramond
ALGERIAN
Aliens ate my mum
Allegro BT
AmerType Md BT
ANAGRAM

When you click the Font Size drop list, a series of numbers, representing sizes from 8 to 72 points appears (you have to scroll to see all the sizes). To select and apply a size, all you need to do is click the size you want to apply. You can also click in the button and type a new size, if you want one that's not represented in the list. After entering the number, press ENTER to apply it to your selected text.

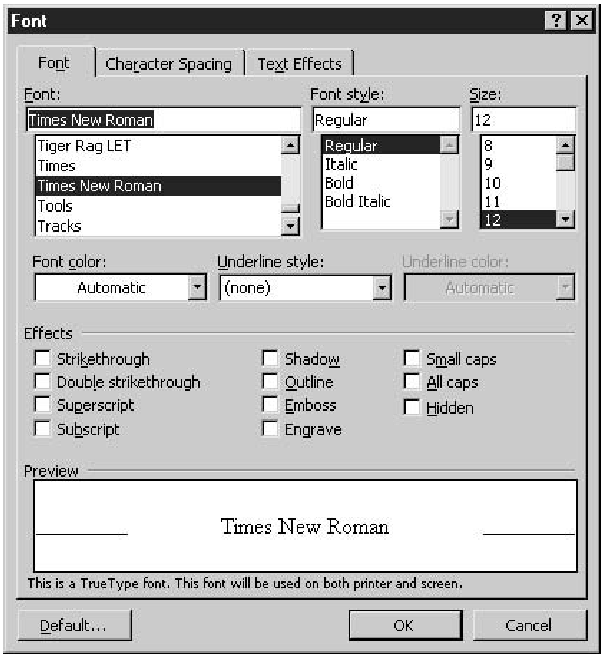
Using the Font Format Dialog Box

Although the Font and Font Size buttons on the Formatting toolbar are easy to use, they don't give you as many options for formatting text as you'll find in the Font dialog box. To use it, select the text you want to format and then choose Format | Font. The dialog box appears in Figure 6-2.

If you would like to change Word's default of 12-point Times New Roman, make your selections and then click the Default button in the Font dialog box. A prompt will appear, asking if you really want to make your choices the default for all new documents based on the Normal template. Ideally, you want the font and size you've set as the new default to be appropriate for 99 percent of your documents; otherwise, you could be creating more formatting work for yourself.

Applying Text Color

Available through the Font dialog box and from the Formatting toolbar is the ability to change the color of text. By default, text is set to Automatic, which is the color set as your text color



Font: Times New Roman

Font style: Regular

Size: 12

Font color: Automatic

Underline style: (none)

Underline color: Automatic

☐ Strikethrough
☐ Double strikethrough
☐ Superscript
☐ Subscript
☐ Shadow
☐ Outline
☐ Emboss
☐ Engrave
☐ Small caps
☐ All caps
☐ Hidden

Times New Roman

This is a TrueType font. This font will be used on both printer and screen.

FIGURE 6-2 The Font dialog box provides one-stop shopping for your character-formatting needs.

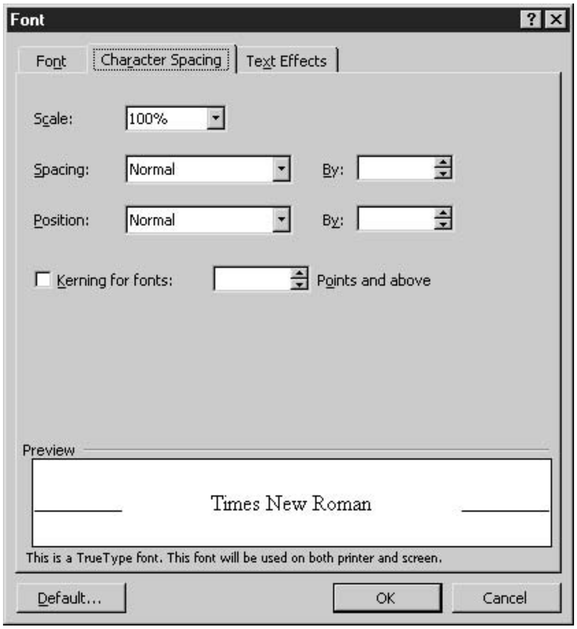
through the Windows Display Properties. For most users, this means Black. You can change your text to any color of the rainbow, using the palette of 40 different colors that appears when you click the Font Color button on the toolbar or the Font Color drop list in the Font dialog box.

You can choose More Colors from the palette to open the Colors dialog box, which allows you to choose from more than 100 different colors, plus several shades of gray, or you can click the Custom tab and create your own colors by adjusting the levels of colors within the color model that you select. You can click anywhere on the spectrum shown on the tab, and then raise or lower the brightness (amount of white or black) and tweak the color levels by using the spinner triangles for each color level.

Applying Special Text Effects

Accessible only through the Font dialog box, you can change the spacing between letters (known as *kerning* when you're adjusting the space between two characters, and as *tracking* when you're adjusting space throughout a word or sentence) and apply fancy-schmancy text animations.

Why change character spacing? For the sake of legibility—sometimes very small text is easier to read if you add a little space between letters—and for graphic effect. Imagine spreading a title across a page rather than leaving the letters of a word or phrase clustered in the middle of the page. You can spread text out over the width of the page or any portion thereof, or if you need to tweak the space between letters so that something will fit "just so" on a line, you can reduce the spacing between letters as well. The Character Spacing tab is shown in Figure 6-3.



Scale: 100%

Spacing: Normal

Position: Normal

☐ Kerning for fonts:

This is a TrueType font. This font will be used on both printer and screen.

FIGURE 6-3 Adjust the space between, and vertical position of, characters in your document.

Another thing you can do on the Character Spacing tab has nothing to do with the spacing between letters, but with the spacing between the text and the *baseline.* The baseline is the invisible foundation each line of text sits on; the descenders of letters such as *y, g, p, q* dip below that line. The Position option (also shown in Figure 6-3) in the Character Spacing tab allows you to adjust the distance above or below the baseline that your selected text should be. You can choose Raised or Lowered and then set the point distance you want the text moved up or down.

The Text Effects tab offers six different animations—from a flashing background to sparkling confetti—and allows you to preview the selected effect before you apply it to your text. Of course, the animations show only in documents onscreen, because printing can't capture motion.

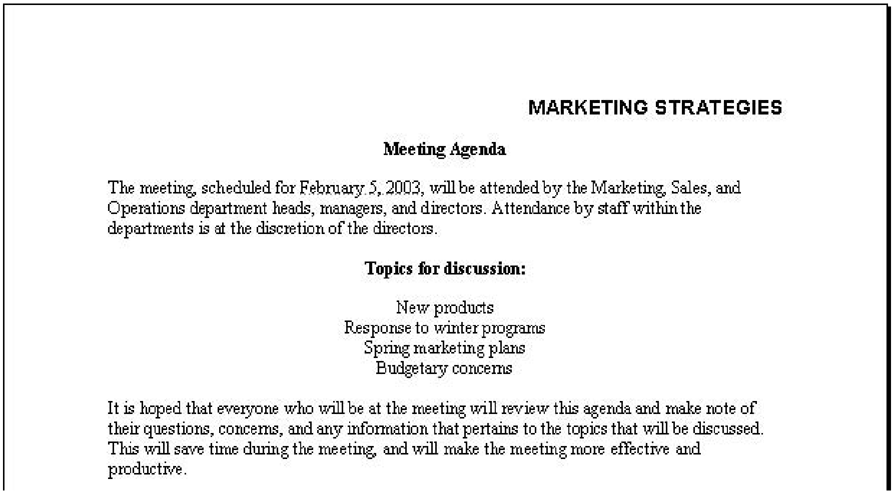
Altering Text Position and Flow

In a new document based on the Normal template, text flows (thanks to *word wrap,* discussed in Chapter 4) from line to line, and only when forced line and paragraph breaks are inserted, does that flow change. If left to its defaults, a Word document's text will follow the block letter format—text aligned to the left side of the page, with no indents for the first line of paragraphs and no other indents from the left or right side of paragraphs.

Changing Paragraph Alignment

The simplest, most commonly performed paragraph formatting is a change in paragraph alignment. As previously stated, the default for all document text is left alignment, meaning the text flows out from the left side of the page, and the text is flush with the left margin. The right margin text is ragged, with the distance between the end of the line and the margin varying on each line because of the length of words and how they fit (or don't fit) on the lines.

Not all text in a document should be left-aligned, however. Headings and titles can be centered (or even right-aligned) to change the visual layout of the page, indicating a change in topic. As you can see here, simply changing the alignment of a series of headings makes a rather boring-looking document look a little more interesting.



MARKETING STRATEGIES

Meeting Agenda

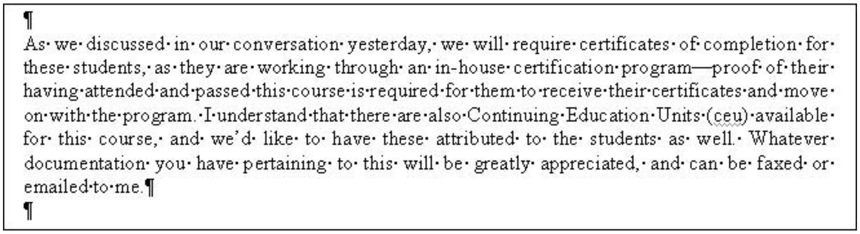
The meeting, scheduled for February 5, 2003, will be attended by the Marketing, Sales, and Operations department heads, managers, and directors. Attendance by staff within the departments is at the discretion of the directors.

Topics for discussion:

New products
Response to winter programs
Spring marketing plans
Budgetary concerns

It is hoped that everyone who will be at the meeting will review this agenda and make note of their questions, concerns, and any information that pertains to the topics that will be discussed. This will save time during the meeting, and will make the meeting more effective and productive.

Full justification is left alignment with a twist. Instead of the right margin being ragged as word wrap forces words of varying length onto the next line, the right margin is straight, just like the left. This effect is achieved by Word increasing and decreasing the size of the spaces between letters and words throughout the lines of a paragraph until the block effect you see here is achieved.

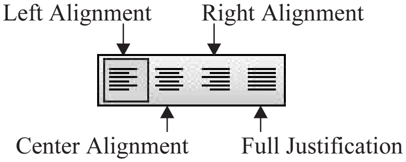


¶
As·we·discussed·in·our·conversation·yesterday,·we·will·require·certificates·of·completion·for·
these·students,·as·they·are·working·through·an·in-house·certification·program—proof·of·their·
having·attended·and·passed·this·course·is·required·for·them·to·receive·their·certificates·and·move·
on·with·the·program.·I·understand·that·there·are·also·Continuing·Education·Units·(ceu)·available·
for·this·course,·and·we'd·like·to·have·these·attributed·to·the·students·as·well.·Whatever·
documentation·you·have·pertaining·to·this·will·be·greatly·appreciated,·and·can·be·faxed·or·
emailed·to·me.¶
¶

TIP *Full justification makes it easier to read snaking columns of text that wrap vertically on a page, such as in newspaper columns. More on this is in Chapter 7.*

Remember that alignment is a paragraph format. If you select an individual word inside a paragraph and change the alignment, the entire paragraph's alignment will change. Therefore, unless you're changing the alignment of a series of consecutive paragraphs, you don't need to select a paragraph to align it. Just leave your cursor in the paragraph and then employ one of the following techniques to change the alignment to suit your needs:

- *Click the Alignment buttons on the Formatting toolbar*. There are four of them: Align Left, Align Center, Align Right, and Justify.

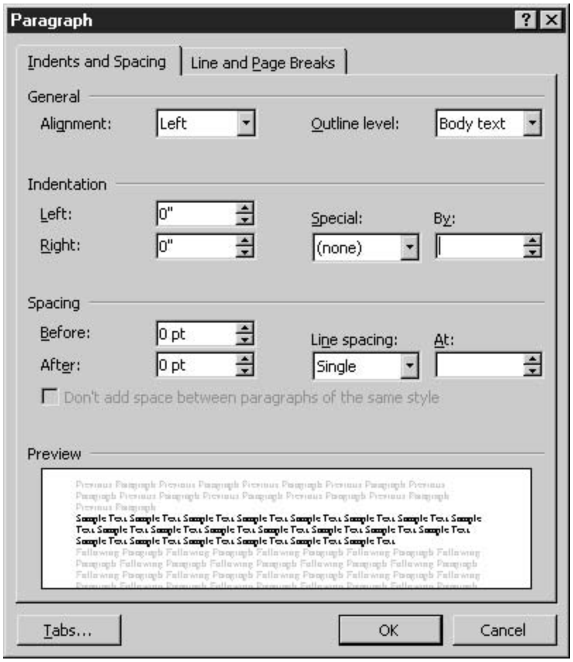


- *Use keyboard shortcuts.* These are CTRL-L for Left, CTRL-R for Right, and CTRL-J for Justify. The only surprise? CTRL-E for Center. (CTRL-C was taken by the Copy command.)
- *Choose Format | Paragraph*. In the Indents and Spacing tab, click the Alignment drop list and choose Left, Centered, Right, or Justified. Figure 6-4 shows the Paragraph dialog box, and a variety of paragraph formats that it allows you to apply.

Indenting Text

The quickest way to indent a paragraph is to press TAB before you start typing the first word in the paragraph. An instant half-inch indent will be applied to the paragraph's first line, and as word wrap kicks in, the next line of the paragraph will run back to the margin, unindented. This is the most common form of indent and the easiest to apply.

Using the Increase Indent button on the Formatting toolbar you can achieve a quick indent from the left, in half-inch increments, for the entire paragraph containing the cursor. The Decrease



Alignment: Left
Outline level: Body text
Left: 0"
Right: 0"
Special: (none)
By:
Before: 0 pt
After: 0 pt
Line spacing: Single
At:
☐ Don't add space between paragraphs of the same style

FIGURE 6-4 Using the Paragraph dialog box for alignment takes longer, but it contains many other formatting features that aren't represented elsewhere.

Indent button works in reverse. As shown in Figure 6-5, there are a variety of indent effects you can achieve.

Setting Indents from the Keyboard

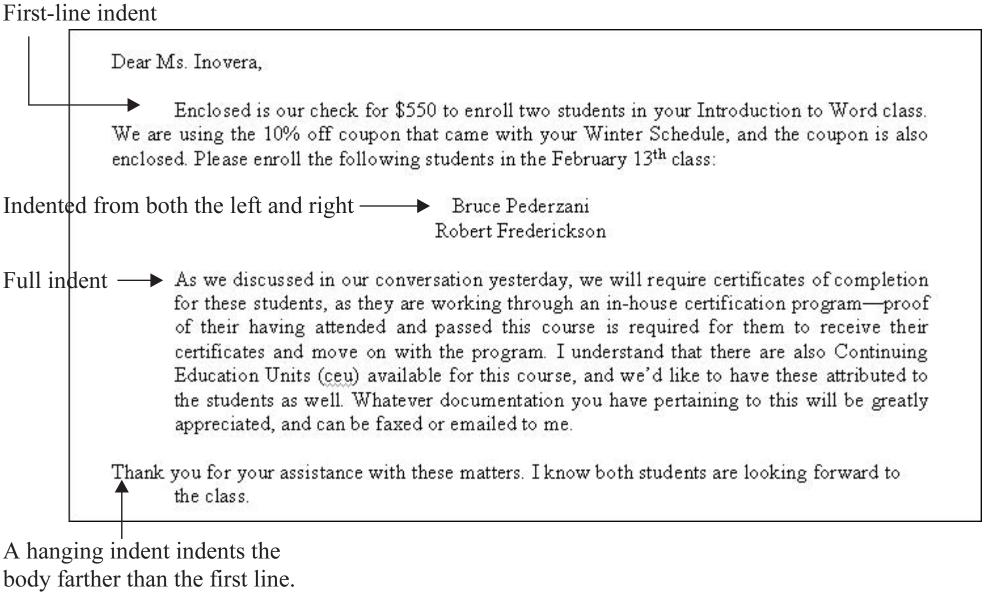
Word offers a series of keyboard shortcuts designed to allow you to indent your text as you type—no need to even remove your fingers from the keyboard to reposition your text:

- CTRL-M indents text from the left, one half of an inch.
- CTRL-SHIFT-M reduces the left indent by a half an inch.
- CTRL-T creates a hanging indent.
- CTRL-Q removes all paragraph formatting, including indents.

CAUTION *Be careful when using the CTRL-Q shortcut to remove your indents. If your text is bulleted or numbered as well, that formatting will also be removed.*

Indenting Text via the Ruler

First, make sure your ruler is displayed. If it's not, choose View | Ruler. With your ruler in place, stop to identify the indent markers on the ruler, as shown here. The triangles represent the


First-line indent
Indented from both the left and right
Full indent
A hanging indent indents the
body farther than the first line.

Dear Ms. Inovera,

Enclosed is our check for $550 to enroll two students in your Introduction to Word class. We are using the 10% off coupon that came with your Winter Schedule, and the coupon is also enclosed. Please enroll the following students in the February 13th class:

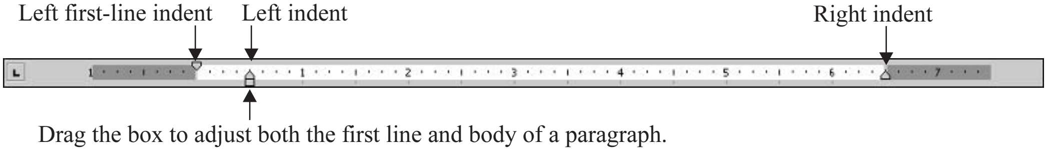
Bruce Pederzani
Robert Frederickson

As we discussed in our conversation yesterday, we will require certificates of completion for these students, as they are working through an in-house certification program—proof of their having attended and passed this course is required for them to receive their certificates and move on with the program. I understand that there are also Continuing Education Units (ceu) available for this course, and we'd like to have these attributed to the students as well. Whatever documentation you have pertaining to this will be greatly appreciated, and can be faxed or emailed to me.

Thank you for your assistance with these matters. I know both students are looking forward to the class.

FIGURE 6-5 Between the Paragraph dialog box, the toolbar, the ruler, and the keyboard, you can set a wide assortment of indents.

positions of paragraph text on the left and right. Once you've spotted the tools, you can use them (by dragging them with your mouse) to adjust the indent of selected text.


Left first-line indent
Left indent
Right indent
1
2
3
4
5
6
7
Drag the box to adjust both the first line and body of a paragraph.

Although it isn't the fastest way to set an indent, using the Paragraph dialog box is the most accurate method. Choose Format | Paragraph to open the dialog box, then refer to the Indentation section to set left and right indents, as well as special indents, such as a first-line indent or a hanging indent.

Adjusting Line Spacing

By default, text in a document based on the Normal template is single-spaced. You can also set line spacing to double or to one-and-a-half line spacing using these methods:

- *Use the keyboard*. Select your text and then press CTRL-2 to change to double spacing, CTRL-5 for one-and-a-half line spacing, or CTRL-1 for single spacing. You want to use the numbers above the alphabetical keyboard, not the ones found on the numeric keypad.

- *Click the Line Spacing button on the Formatting toolbar.* The button has a drop-down triangle and offers line-spacing options of 1, 1.5, 2, 2.5, and 3. If you click the More option, the Paragraph dialog box opens, and you can set spacing to any number of lines there.
- *Use the Paragraph dialog box*. Choose Format | Paragraph and, in the Line Spacing section of the dialog box, click the drop list and choose from six different spacing options. If you choose At Least, Exactly, or Multiple, you need to use the At box to the right to enter the measurement (in points) or number of lines (for Multiple).

Understanding Text-Flow Controls

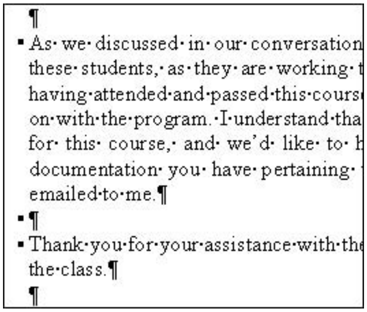
Word wrap keeps your text flowing from line to line within paragraphs so that as soon as your text exceeds the width of the page within the margins, the text is forced onto the next line. Text flow between pages is also something that occurs naturally. As soon as your text exceeds the height of the page within the top and bottom margins, a page break is inserted automatically, and your text flows onto the next page—with a few minor exceptions:

- Word won't leave a single sentence from a paragraph back on the previous page if the rest of the paragraph is being forced onto the next page. It will force the entire paragraph to the new page rather than leave that sole sentence behind.
- If the opposite occurs—all but the last sentence of a paragraph fits on a page, but that last sentence is forced onto the next page—Word will keep the entire paragraph on the previous page rather than send a lone sentence on ahead.

The technical terms for these straggling sentences are *widows* and *orphans.* Widows are the single sentences sent ahead to the next page while the rest of the paragraph remains on the previous page. Orphans are the sentences that are left behind when the rest of the paragraph has flowed to the next page. This sort of flow control is also called *pagination*, and it is by this term that Word refers to text flow from page to page. To access all of Word's pagination controls, choose Format | Paragraph and click the Line and Page Breaks tab in the Paragraph dialog box (see Figure 6-6).

The other pagination options allow you to control the relationship between two or more contiguous paragraphs and to make sure a selected paragraph is always at the top of a page, no matter what happens in your document. The remaining three pagination options are described in the following list:

- **Keep Lines Together** Selecting a paragraph and then turning on this option prevents the paragraph from ever being split up by a page break.
- **Keep with Next** If it's important that a pair or series of paragraphs remain together and never be separated by a page break, select them, and then turn this option on. If keeping the reader's attention and preventing the physical break in concentration caused by turning the page or scrolling down in a document to read the next page are important, you'll like this option. The following illustration shows the small black boxes in the left margin that indicate two paragraphs (and the blank line between them) are set to be kept together.

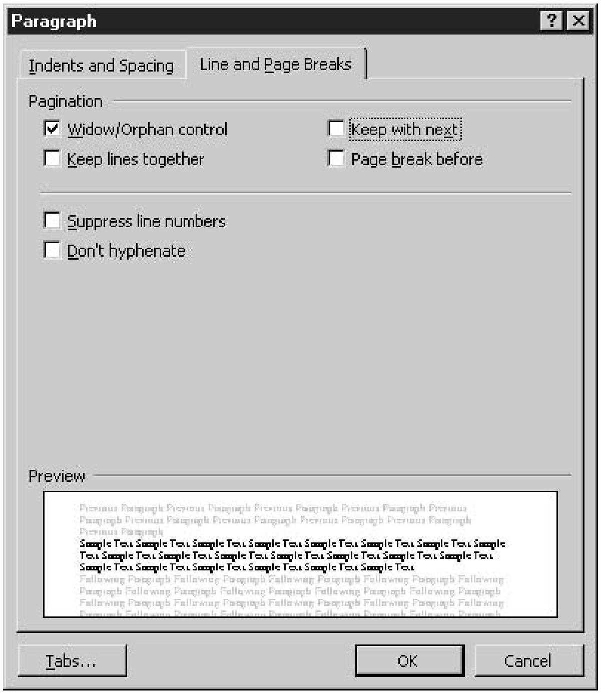


¶
▪ As· we· discussed· in· our· conversation
these· students,· as· they· are· working· t
having·attended·and·passed·this·cours
on·with·the·program.·I·understand·tha
for· this· course,· and· we'd· like· to· h
documentation· you· have· pertaining·
emailed·to·me.¶
▪¶
▪ Thank·you·for·your·assistance·with·th
the·class.¶
¶

- **Page Break Before** Normally applied to headings, this pagination option forces a page break before a selected paragraph. The result of this action is that no matter how much text you add before the paragraph—which might push it to the middle or bottom of a page—Word will keep the paragraph at the top of a page, tying the paragraph to the page break preceding it.

TIP

If you insert a page break (by pressing CTRL-ENTER*), Word will ignore the pagination settings and allow a page break to occur between paragraphs or lines set to be kept together.*



Paragraph

Indents and Spacing | Line and Page Breaks

Pagination

☑ Widow/Orphan control
☐ Keep lines together
☐ Keep with next
☐ Page break before

☐ Suppress line numbers
☐ Don't hyphenate

Preview

FIGURE 6-6 Turn Word's pagination options on or off to suit the needs of your document.

The remaining two options in the Line and Page Breaks tab pertain to text as it appears in lines rather than how text is handled across naturally occurring page breaks. Suppress Line Numbers will prevent selected lines from being numbered if you apply line numbers to a series of lines or an entire document. The Don't Hyphenate option will prevent a selected, longer word from being broken at the right margin and hyphenated.

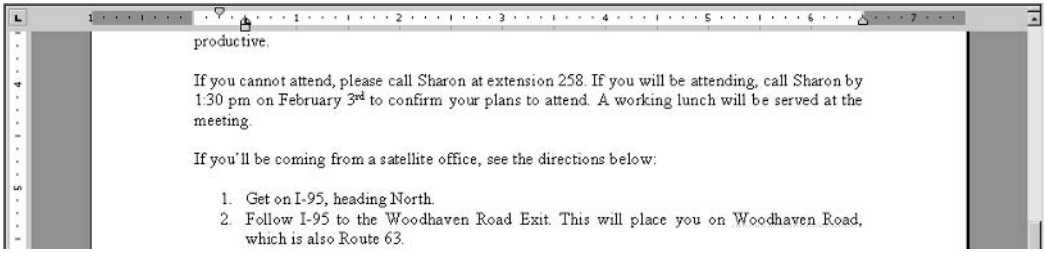
Creating Lists

This book is full of lists—lists of features, bulleted to indicate that each paragraph represents a separate point in a series of related points, and numbered lists that indicate the order in which steps are to be performed.

When creating bulleted or numbered lists, it's important that you type the lists first and *then* apply the list formatting. Why? Because it saves a lot of work—about 50 percent of the labor. If you decide to bullet or number as you go, you'd have to turn the bulleting or numbering on, type the list, and then turn bulleting or numbering off before continuing to type in the document.

Numbering a List of Steps

By default, numbered lists are numbered with Arabic numbers (1, 2, 3, and so on), and each number is followed by a period. Numbered steps that exceed a single line wrap so that the subsequent lines left-align under the first word in the first line, and the ruler indent markers indicate the location of the bullet and body of step.



productive.

If you cannot attend, please call Sharon at extension 258. If you will be attending, call Sharon by 1:30 pm on February 3rd to confirm your plans to attend. A working lunch will be served at the meeting.

If you'll be coming from a satellite office, see the directions below:

1. Get on I-95, heading North.
2. Follow I-95 to the Woodhaven Road Exit. This will place you on Woodhaven Road, which is also Route 63.

After you number a list, you can turn numbering off for one or more items in the list, or you can delete items in the list and the numbering within the list will be adjusted accordingly. You can also add items to the list, and as long as you add them before the final paragraph mark for the final item in the list, the new item(s) will be numbered and the surrounding numbered items will be renumbered to accommodate the addition.

To apply numbering to a list of paragraphs, you can employ either of the following methods:

- Select the text and click the Numbering button on the Formatting toolbar.
- Select the text and choose Format | Bullets and Numbering. In the resulting Bullets and Numbering dialog box, click the Numbered tab (see Figure 6-7) and choose the numbering style you want to apply.

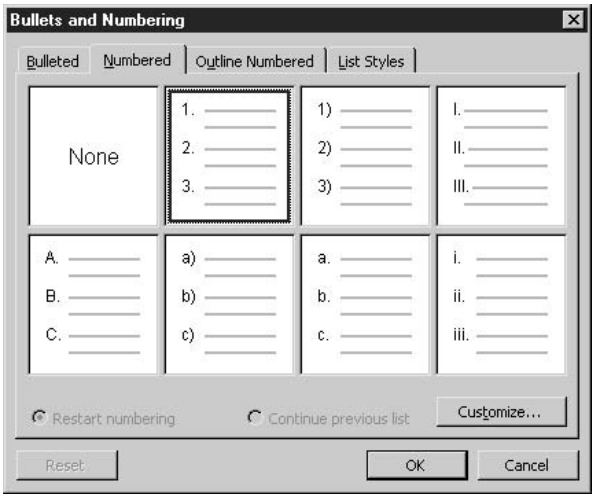

Bullets and Numbering
Bulleted
Numbered
Outline Numbered
List Styles
None
1. 2. 3.
1) 2) 3)
I. II. III.
A. B. C.
a) b) c)
a. b. c.
i. ii. iii.
● Restart numbering
○ Continue previous list
Customize...
Reset
OK
Cancel

FIGURE 6-7 There are eight main numbering styles, including None.

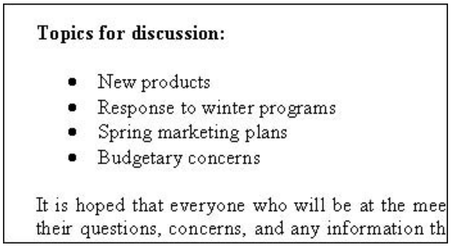
Turning off numbering for a selected series of paragraphs is just as simple. You can either toggle the Numbering button while the list is selected or choose Format | Bullets and Numbering and on the Numbered tab choose the None style and click OK.

TIP

If you have more than one numbered list in your document, Word might need to make one a continuation of the other. If this need arises (say, a list of four steps following a list of five steps on a previous page starts with the number 6), select the incorrectly numbered list and open the Bullets and Numbering dialog box. Select the Numbered tab, click the Restart Numbering option, and then click OK. The list will be renumbered, starting with 1.

Creating a List of Points

When you have a list of words, phrases, or paragraphs that don't need to be in any particular order, or that don't represent instructions or a prioritized list of terms or concepts, you want to use bullets for each item in the list. Again, you also want to select the list before applying the bullets so that Word knows which text to bullet. The default bullet is a large black dot to the left of each item in the list:



Topics for discussion:

- New products
- Response to winter programs
- Spring marketing plans
- Budgetary concerns

It is hoped that everyone who will be at the mee
their questions, concerns, and any information th

You can apply bullets in one of two ways:

- Select the text and click the Bullets button on the Formatting toolbar.
- Select the text and choose Format | Bullets and Numbering. On the Bulleted tab (see Figure 6-8), choose the bullet style you want to apply by clicking in one of the seven boxes (other than None). Click OK to apply the selected bullets to your list.

To turn off bulleting for one or more (or all) of the items in a list, you can click the Bullets button, which will toggle off the bulleting, or choose Format | Bullets and Numbering. In the Bulleted box, click the None box and then click OK to remove the bulleting from selected text.

Don't like any of the seven bullet styles? You can apply virtually any character or picture to your list, turning the image into a bullet. In the Bullets and Numbering dialog box (on the Bulleted tab), click any one of the offered styles. Note that the Customize button becomes available. Click it. In the resulting Customize Bulleted List dialog box you can click the Font, Character, or Picture button to access various font libraries, symbols, or graphics to serve as your bullet. You can also set indents and the distance between text and bullets.

Working with Styles

A *style* is a collection of formats you can apply to individual characters and entire paragraphs to change the appearance of the text in several ways, such as changing the font, size, or position and making the text bold or italic. Any formatting you can apply to text can be made part of a style, and when that style is applied to the text, the associated formats are applied as well.

Why use styles? For two main reasons: speed and consistency. Imagine you have a document that's divided into chapters, each of which starts with a title. Imagine further that you have formatted

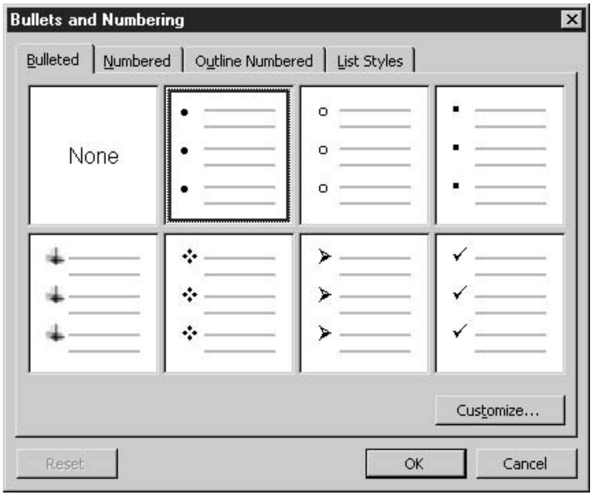


FIGURE 6-8 Eight options (including None) are offered for bulleting your selected list.

the first of those chapter titles in a very specific way. You've chosen a font, size, and color; changed the alignment of the title text; and added paragraph formatting to insert extra space after the titles. That's five different formats applied to the chapter titles. By creating a style for the chapter titles, you can apply all five of the formats with one action, which will take much less time than applying the formats to each title individually, and it will eliminate the possibility of one title looking different from another.

Of course, Word comes with a long list of styles built in, and the ones you'll see when you start a new, blank document are the styles that are part of the aforementioned Normal template. There are heading styles, styles for paragraph text, and styles for bulleted and numbered lists. You can apply these styles from the Style drop list (on the Formatting toolbar) by simply selecting the text the style should apply to and then clicking the desired style in the drop list. You can also display the Styles and Formatting task pane (see Figure 6-9) to view and apply the available styles from there.

TIP *If you're using other templates, you may find additional styles appearing in the Style drop list or on the Styles and Formatting task pane.*

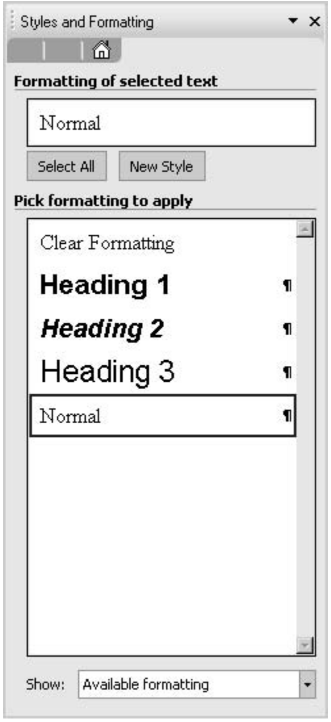

Styles and Formatting
Formatting of selected text
Normal
Select All
New Style
Pick formatting to apply
Clear Formatting
Heading 1
Heading 2
Heading 3
Normal
Show:
Available formatting

FIGURE 6-9 The Styles and Formatting task pane offers a list of styles and access to tools for creating new styles.

Creating Styles

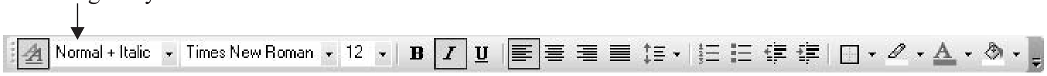
You can easily build your own styles and make them available in specific documents or in all existing and future documents. There are two methods for creating new styles: by example, in which you format and select text to serve as a sample of the new style's formatting, and through the New Style button on the Styles and Formatting task pane. The latter approach provides a dialog box through which to create the style, and it allows you to apply the style to the Normal template, which will make the style available to all documents based on the Normal template. If you don't opt to make the style part of the template, the style will be available only in the document in which the style was created. Styles made "by example" are available only in the current document.

Creating Styles by Example

The fastest way to create a style is to base the new style on existing text, following these steps:

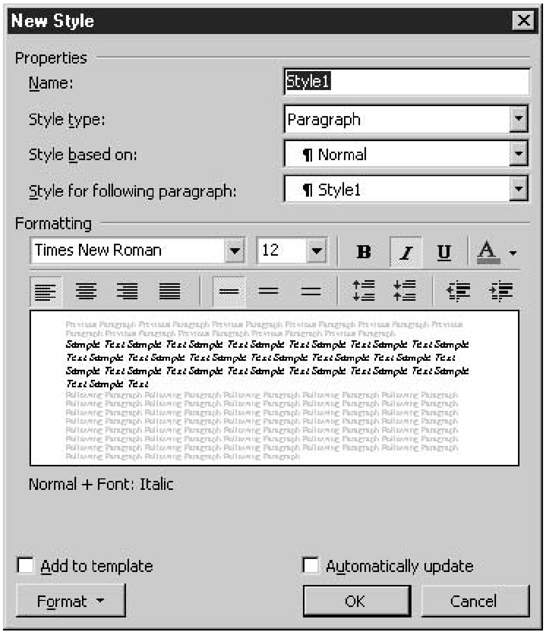
1. In the document where you want the new style to be available, select some text to which the style should be applied.
2. Format the text as desired. Select the font, size, color, alignment, and any other formats that are available through the Formatting toolbar, the Font dialog box, or the Paragraph dialog box.
3. With the text still selected, click once on the displayed style in the Style box on the Formatting toolbar. The style name will become highlighted.
4. Type the name for your new style (the name you type will replace the highlighted style name) and press ENTER. The style is instantly created and can be applied throughout your active document.

You can create as many styles-by-example as you need in a given document, and you can create multiple versions of a single style. When you modify a style (using the by-example method discussed earlier), the Style box will display the current style followed by a plus sign (+) and the changed format, as shown here. Click the style name and press ENTER to create the new version of the original style.


Changed style

Building a New Style

If you prefer a more methodical approach to creating styles, or if you want more control over the way a style will work, you can use the New Style button in the Styles and Formatting task pane. When you click the button, the New Style dialog box opens, as shown in Figure 6-10. You can name your style, choose the type of style (character, paragraph, table, or list), choose a style to base the new style on, and select what style will be applied to text in the next paragraph. All the



Name: Style1

Style type: Paragraph

Style based on: ¶ Normal

Style for following paragraph: ¶ Style1

Times New Roman 12

Normal + Font: Italic

☐ Add to template

☐ Automatically update

FIGURE 6-10 Create a new style from scratch, controlling every aspect of the character and paragraph formatting that the style will apply.

formatting tools you'll need for font, size, color, alignment, spacing, and indents are available in the dialog box.

If you want the style to be available beyond the active document, click the Add to Template check box. This will make the style a part of the Normal template, and any documents created based on that template (which includes all new, blank documents) will contain your style in the Style drop list. If you don't check this option, the style will be available only in the active document.

The Automatically Update option is a trickier one. If you turn this on, any time you make any formatting change to text that is formatted with a given style, all text formatted with that style will be changed to match whatever formatting change you've applied. For example, if you create a Title style that's Times New Roman, 20 points, blue text, bold, and centered, then later you left-align some text that's been formatted with the Title style, all the other Title-formatted text will become left-aligned. You can imagine the negative impact of such a sweeping change, so use this option with great care!

Editing and Deleting Styles

To edit any style—one that came installed with Word, one that you created by example, or one you built from scratch in the New Style dialog box—simply click the drop list on the style in the Styles and Formatting task pane and choose Modify from the resulting menu. The Modify Style dialog box opens, which is identical to the New Style dialog box. You can change any aspect of the style, including the name if you want to make a new style that's based on the one you're editing. Doing so will leave the selected style intact and create a new style. Once your changes are made, click OK to put them into effect.

If you want to get rid of a style, click the style's drop list in the Styles and Formatting task pane and choose Delete. A prompt will appear, asking you to confirm your intention to delete the style. Click Yes to go through with the deletion. It's important to note that if you delete a style that other styles are based on, those styles will be deleted as well.

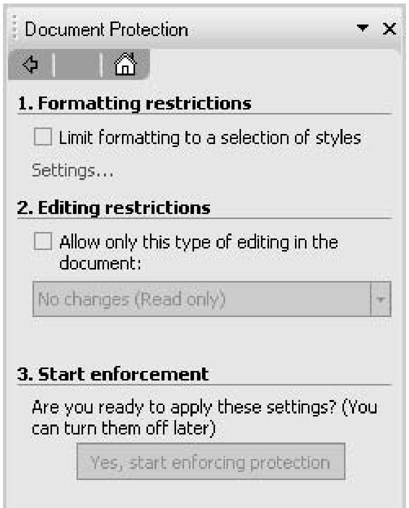
There are some styles you can't delete, such as the Normal style because it's the basis of all Word's built-in styles. You also can't delete the built-in Heading 1, 2, and 3 styles, although any of them can be modified. If you do choose to modify these installed styles, be sure your changes will be appropriate for the vast majority of your documents.

Locking Styles and Formatting to Prevent Changes to Your Templates

A new feature of Office 2003 allows you to lock styles that you have created, preventing anyone from changing them later. This helps you keep documents consistent and is a great tool when you're using styles in templates. After all, the whole purpose of a template is to make it possible to create documents quickly and to have the documents look the *same*, every time.

To lock your formatting (including styles), follow these steps:

1. In the document that you want to control, display the Document Protection task pane.



Document Protection

1. Formatting restrictions

☐ Limit formatting to a selection of styles

Settings...

2. Editing restrictions

☐ Allow only this type of editing in the document:

No changes (Read only)

3. Start enforcement

Are you ready to apply these settings? (You can turn them off later)

Yes, start enforcing protection

2. Use either or both of the first two formatting controls: Formatting Restrictions and Editing Restrictions.

3. If you’re using the first control (Formatting Restrictions), click the Settings link. This opens the Formatting Restrictions dialog box, which displays a list of styles that are editable. If you don’t want any of your styles changed, make sure all of them are checked in the list.
4. Click OK to return to the document.

If you’d like to start using the protections you’ve applied, click the Yes, Start Enforcing Protection button in the third section of the Document Protection task pane. Once you click that button, no one using the document will be able to make changes to the formatting—unless, of course, they turn off the controls using the same task pane you use to turn them on.

Customizing Page Layout

The third level of formatting for any document is page formatting. Placing it third in this chapter and in discussions of the types of formatting one can do in Word (character, paragraph, and page formatting) does not imply that page formatting should be done last or that it is of less importance than character and paragraph formatting. Rather, if you think of formatting as a building process, you’re working from the inside out, starting at an atomic level with character formatting, then dealing with text in larger pieces through paragraph formatting, and culminating the formatting process with changes to the document as a whole.

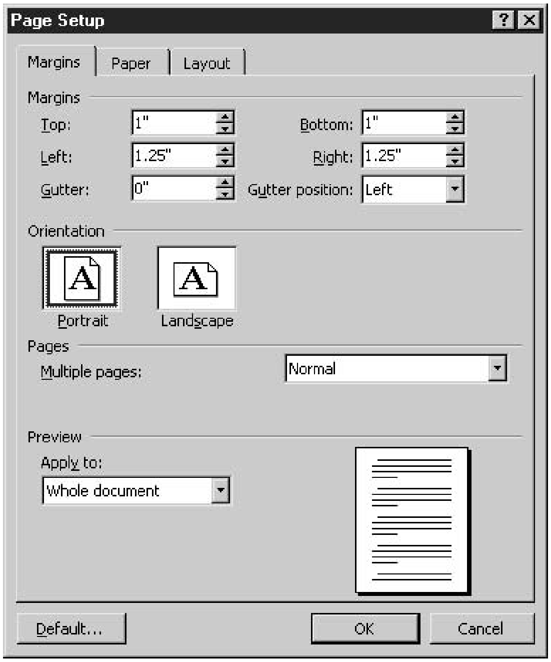
Page formatting includes adjusting margins, changing the paper size, and turning the paper in another direction, also known as changing the *page orientation.* These changes can affect the flow of text, because changes in the margin will increase or decrease the amount of the paper text can be printed on. Changing the paper size can have a similar effect. For example, if you make your paper size larger, even if your margins don’t change, the amount of the page you can print on will change. Page orientation can also affect the flow of text because the width and height of the paper will be changed, going from 8.5 inches wide by 11 inches tall to 11 inches wide by 8.5 inches tall.

Whenever you change page formatting, you have the opportunity to choose how much of the document is affected by your change. If you choose to apply the changes to anything less than the entire document, a section break will be inserted, essentially saying that the document is now broken into two sections—a section where one set of page formats are in use, and another where a different set of page formats are applied. This shouldn’t affect your document building and editing process in any significant way because things such as page numbers and headers and footers will span section breaks and flow consistently throughout the document by default.

Setting New Page Margins

By default, your page margins are 1 inch on the top and bottom, and 1.25 inches on the left and right. This is fine for most business documents, but you might want to change them for certain documents or reset them for all documents by changing the default to some new set of margins.

To change the margins for the active document, choose File | Page Setup. In the resulting Page Setup dialog box (see Figure 6-11), click the Margins tab and view the Top, Bottom, Left,



Margins
Top: 1"
Bottom: 1"
Left: 1.25"
Right: 1.25"
Gutter: 0"
Gutter position: Left

Orientation: Portrait

Pages
Multiple pages: Normal

Preview
Apply to: Whole document

FIGURE 6-11 Change one or more of the four margins for your page.

and Right margin settings. You can increase and decrease them individually by typing new numbers in each box or by using the spinner triangle buttons on each of the margin boxes.

NOTE

The gutter options apply to documents that will be bound. The gutter *is the extra space you'll want to have in the margin so your text won't be cut off by the binding. By entering a gutter measurement (it's 0 inches by default), you add to the margin for that side of the page (left for odd pages, right for even pages). Use the Gutter Position setting to choose the side of the document that will be bound: Left for book-style binding or Top for easel-style binding.*

Adjusting Page Orientation

The Margins tab is also the home of the Orientation setting, giving you a choice between Portrait or Landscape orientation for your paper. By default, all document pages are in Portrait mode, but you might need to apply Landscape orientation to documents that contain wide content—tables that need more columns than Portrait mode will accommodate—or if you want to print a sign or banner. When you change the Orientation setting, you'll notice that the current margins for the left and right are swapped with the margins for top and bottom. The preview also changes in the Page Setup dialog box to show the new orientation you've selected.

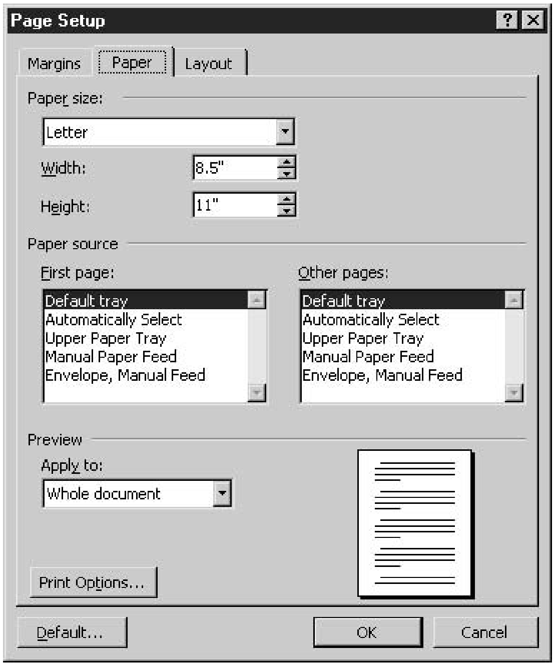
Changing Paper Size

You can also change the size of your paper using the Page Setup dialog box, through the Paper tab, as shown in Figure 6-12. You can click the Paper Size drop list to choose from a variety of preset paper sizes, or you can enter custom width and height measurements if you're using paper that isn't found on the list.

Also found in the Paper tab on the Page Setup dialog box is the ability to control which printer tray paper is drawn from for your first, and subsequent, document pages. Of course, if your printer has only one tray, this might be a moot point. If, on the other hand, your printer has two or more trays or has a tray and a manual feed slot, you can specify which tray to access for the first page of a document (typically to be printed on letterhead) and which tray contains the blank sheets for the rest of the document.

What About the Layout Tab?

I'm not ignoring the Layout tab, but for a basic document, you won't need to tinker with this tab. You can use the Layout tab to set up different headers and footers for the odd and even pages within your document (if you'll be printing on both sides of the paper) and to change the vertical alignment of text. This can be handy for a title or cover page, where you want the text to start in the vertical middle of the document, rather than at the top, which is the default. The Section Start option dictates where section breaks (changes in page layout for certain pages within a document) will occur.



Paper size:

Letter

Width: 8.5"

Height: 11"

Paper source

First page:

- Default tray
- Automatically Select
- Upper Paper Tray
- Manual Paper Feed
- Envelope, Manual Feed

Other pages:

- Default tray
- Automatically Select
- Upper Paper Tray
- Manual Paper Feed
- Envelope, Manual Feed

Preview

Apply to: Whole document

FIGURE 6-12 Letter is the default paper size for users in the United States, whereas A4 is the default for most of Europe.

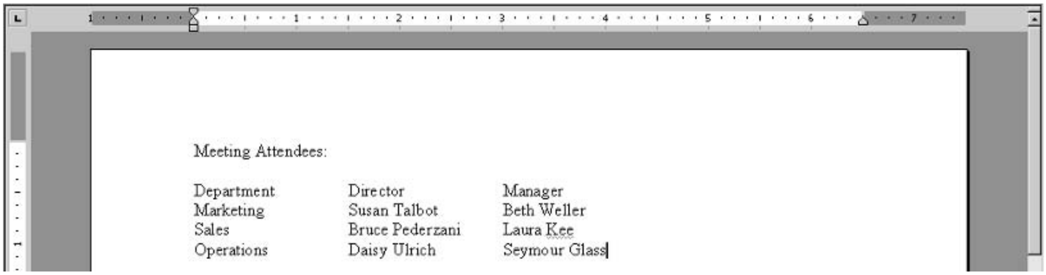
You can also click the Line Numbers button if you're creating a legal document (such as a pleading) or for some other reason need each line of your document numbered.

Working with Tabs

Whenever I teach computer classes to people who have never used a typewriter (electric or manual), I find that I have to explain the use of TAB. On a typewriter, TAB is used to indent text and to create column lists, and it serves as the only way to adjust the horizontal position of text without using the SPACEBAR or changing the margins. The same is true when it comes to word processing. TAB on a computer keyboard is also used to indent the first line of a paragraph and to move text across the page, creating lists of evenly spaced columns. Although Word's Table features (discussed in Chapter 8) are more effective for setting up column lists and structuring document layout, there are some situations in which TAB is just what you need to control the horizontal placement of text quickly and easily.

Creating a Tabbed List

A tabbed list is a series of paragraphs, each containing two or more words or numbers separated by tab codes—the information added to a paragraph by pressing TAB. The information included in the tab code varies depending on the position and alignment of the tab. Each place where TAB is pressed is known as a *tab stop*. The term is also used to indicate a place where a custom tab has been set. As you can see here, a tabbed list looks like a series of neatly spaced columns, with each column's text falling under a tab stop.



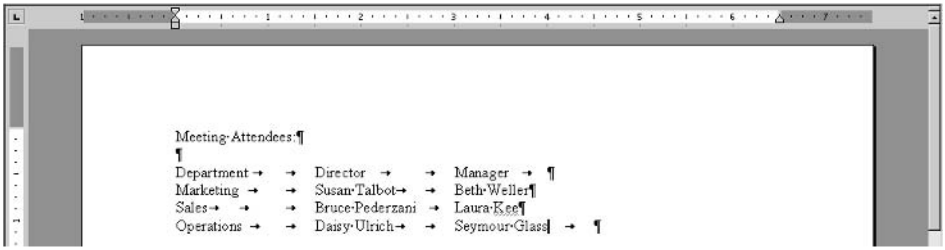
Meeting Attendees:

Department	Director	Manager
Marketing	Susan Talbot	Beth Weller
Sales	Bruce Pederzani	Laura Kee
Operations	Daisy Ulrich	Seymour Glass

Using Word's Default Tabs

When you press TAB in any new document based on the Normal template (I make this qualification in case you're working with someone else's document, where defaults might have been reset), you will see your cursor move one half inch to the right. Each subsequent TAB press moves you another half inch. The text typed under these default tabs is left aligned, and this alignment cannot be changed because there is no real tab stop set and no vehicle for changing the alignment of the text. If you need to set up tabs that are right-aligned or centered, you'll need to use the ruler or Tabs dialog box to set custom tabs.

It can be helpful to turn on Word's Show/Hide feature when creating a tabbed list. Just click the Show/Hide button on the Standard toolbar. As shown here, each tab code is represented by an arrow, and it's easy to see how many tabs were pressed between each item on each line in a tabbed list. Once your list looks and prints as it should, you can turn off Show/Hide.



```
Meeting·Attendees:¶
¶
Department →    →   Director   →    →   Manager  →  ¶
Marketing  →    →   Susan·Talbot→   →   Beth·Weller¶
Sales→   →      →   Bruce·Pederzani →   Laura·Kee¶
Operations →    →   Daisy·Ulrich→   →   Seymour·Glass  →  ¶
```

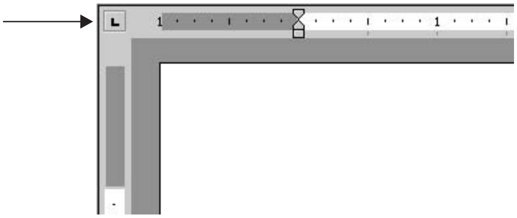
Setting Tabs from the Ruler

When you need tabs that don't fall neatly on each half-inch mark on the ruler, you can use custom tabs. Custom tabs can be set from the ruler or by using the Tabs dialog box, or a combination of both tools. The ruler is probably the easiest tool to use for building custom tabs, but it does have some limitations. You can't set up *leaders,* the characters that lead up to a tab, such as dots (periods), dashes, or underscores. You also can't set very specific, accurate measurements on the ruler, simply because of the way it's calibrated onscreen. If you need a tab stop at precisely 1.6 inches, the Tabs dialog box is your best bet. If you'd be just as happy with a tab set at approximately an inch and a half, then the ruler method is for you.

Of course, to use the ruler to set tabs, the ruler must be displayed. If it isn't, choose View | Ruler. Further, you might wish to switch to Print Layout view (View | Print Layout), and you might even want to reduce your Zoom setting to Page Width so you can see the entire width of the page.

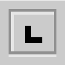
Choosing Tab Alignment

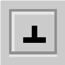
The first step in setting tabs on the ruler is to choose the alignment for the first tab you're going to set. At the junction of the vertical and horizontal rulers (both rulers are visible when you're in Print Layout view) is a tab stop button:

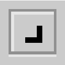


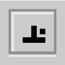
Tab stop button

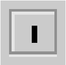
To change to a different tab alignment, click the tab stop button. Each successive click changes the alignment, cycling through Left, Center, Right, Decimal, and Bar. You can also click to display additional first-line and body indent symbols (the triangles used to set indents, discussed earlier in this chapter). For our purposes here, however, we'll stick with the tab stop alignment options. They're represented by the following symbols:


Left


Center

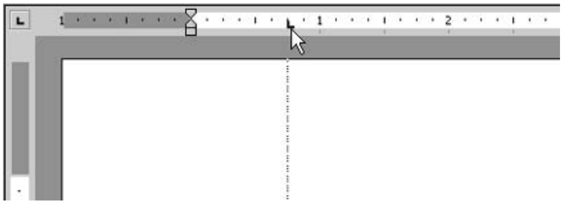

Right


Decimal


Bar

Positioning Tab Stops

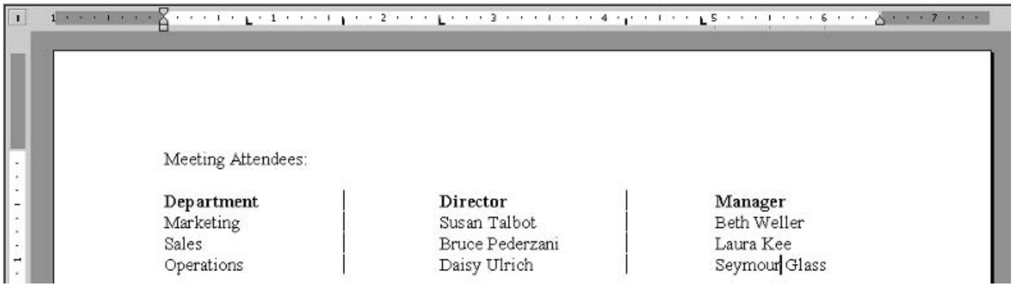
Once you've chosen a tab stop alignment, you need to place that stop on the ruler. To do so, simply click the ruler below the calibrations (clicking above them will have no effect). A vertical line helps you place your tab stop, especially if your document already has text in it.



You can continue to place tab stops on the ruler, placing as many as you need. At each click the ruler will place a new tab stop at the currently selected alignment. If you want to place a stop that's aligned differently, go back to the tab stop alignment button and click it until the desired alignment is displayed, and then click the ruler to place the next stop.

Creating Bar Tabs

When it comes to word processing, the term *bar tab* doesn't refer to money you owe a bartender. Rather, it refers to tabs that create vertical lines between tabbed columns. Positioning bar tabs is done in much the same way as positioning tab stops. The only procedural difference is in your choosing where to place the bar tabs. As shown here, the bar tabs are placed between the regular tab stops, carefully centered between the regular tab stops so that the bars aren't any closer to one column than another.



Meeting Attendees:

Department	**Director**	**Manager**
Marketing	Susan Talbot	Beth Weller
Sales	Bruce Pederzani	Laura Kee
Operations	Daisy Ulrich	Seymour Glass

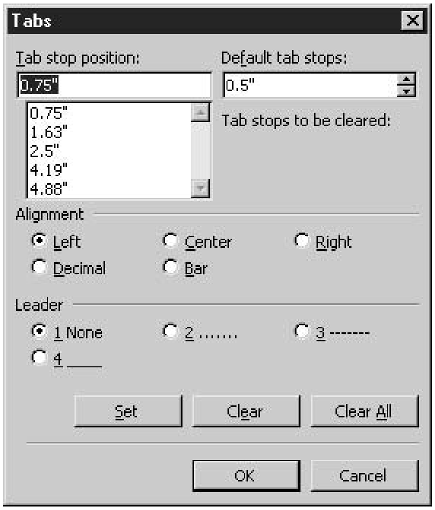
Using the Tabs Dialog Box

The Tabs dialog box provides a complete set of tools for creating tabs at any position on the ruler (see Figure 6-13), aligned to the left, center, right, or a decimal point in your content. You can also set bar tabs, choose a leader character to lead up to tabbed content (thus the term *tab leader)*, and reposition or delete existing tabs.

To open the Tabs dialog box, choose Format | Tabs. From within the Tabs dialog box, follow these steps for creating tab stops:

1. Click in the Tab Stop Position text box and type the ruler position (for example, type **1.75** for an inch and three quarters).
2. Choose the alignment you want for the tab. If you're creating a bar tab, you'll find this within the Alignment options, even though it isn't technically an alignment.
3. Select a leader. None is the default, but you can also choose dots, dashes, or underscores.
4. Click the Set button. The tab stop appears in the white box below the Tab Stop Position field.
5. Repeat steps 1 through 4 for as many tabs as you need to set.
6. When you've set up all the tab stops you need, click OK to close the dialog box and return to the document, with your new tab stops in place on the ruler.

Within the Tabs dialog box, you'll notice the Default Tab Stops field, which displays 0.5" by default. If you want to have default tabs at, say, every inch (instead of every half inch), click the



Tabs

Tab stop position: 0.75"

0.75"
1.63"
2.5"
4.19"
4.88"

Default tab stops: 0.5"

Tab stops to be cleared:

Alignment

● Left ○ Center ○ Right
○ Decimal ○ Bar

Leader

● 1 None ○ 2 .... ○ 3 -------
○ 4 ____

FIGURE 6-13 Set the ruler position and alignment and choose a leader, if needed, for your custom tabs.

spinner triangles until 1" appears in the box. You can increase or decrease the default as desired, and as soon as you click OK, the setting is in effect for the active document.

Setting Up Multiple Tabbed Lists in a Single Document

As with nearly all formatting, tabs are in effect from the point where the cursor was when they were created to the end of the document. For example, if you start a document with a series of paragraphs and then you want to set up some custom tabs two lines below the last of the paragraphs, the tabs will only be in effect from that point on in the document. You can type the tabbed list you want and then return to typing paragraph text, but the custom tab stops you created will remain on the ruler, and any TAB press will place your cursor under one of those custom stops.

This doesn't mean that you can set tabs only once in a document. You can set as many sets of tabs as you'd like, conceivably having a different set for every line of the document. To create a new set of tabs in a document that already has custom tabs set, position your cursor where the new tab settings should begin to take effect and then choose one of these methods for setting the new stops:

- Using the ruler, remove the existing tab stops and create new ones. To remove the existing stops, click and drag them down off the ruler. Don't worry about the text you typed under these stops elsewhere in the document. The only place that's affected by removing the stops is text at the current cursor position.
- Using the Tabs dialog box, click the Clear All button and see that the listed tab stops are removed from the box. Create new tab stops using the dialog box, or click OK and go back to the ruler to set up your new tabs.

Editing Tab Settings

The same techniques you used for creating tab stops can be used to edit them. If you want to move a tab stop, you can use the ruler to literally move the stop itself, or you can use the Tabs dialog box and edit the ruler position. When you edit tab stops, the text typed under those stops is only affected if the text is selected or if it's on the line containing your active (blinking) cursor.

Adjusting Tab Positions

You can use the ruler or the Tabs dialog box to adjust tab stop positions. To move them on the ruler, simply drag the stops (represented by symbols discussed previously) with your mouse. Be careful to keep the mouse steady and to not release the mouse when pointing above or below the ruler. To do so will remove the tab stop in question, not just move it.

If you prefer to use the Tabs dialog box, you can change a tab's position by following these steps:

1. Select the tab stop you want to move by clicking it in the list of tab stops.
2. Click the Clear button. The tab stop is removed from the list.
3. Click in the Tab Stop Position box and type the new position for this tab stop.
4. Choose an alignment and, if needed, a leader for the tab being moved.

5. Click the Set button.
6. Click OK. Even though you've removed the tab and re-created it in a new position, the text at the cursor or any selected text will simply be moved when the Tabs dialog box closes.

Changing Tab Stop Alignment

If you like the position of your tabs but need to change their alignment, you can use the ruler or the Tabs dialog box to make the change. As with any tab creation or change, be sure to select the text that you want to realign before tinkering with the ruler or opening the Tabs dialog box.

To adjust a tab alignment from the ruler, you'll need to remove the misaligned tab stop entirely and re-create it at the same location, following these steps:

1. Drag the misaligned tab stop off the ruler, pulling it down from the ruler with your mouse. The text typed under that tab will fall into place next to any text typed under adjacent tabs. Don't worry if your document looks messed up. You'll be putting things back together in the next step.
2. Click the tab stop alignment button until the desired alignment is displayed.
3. Click the ruler where the removed tab stop was and then replace the misaligned stop with a properly aligned one. The text that had been typed under the removed stop will now fall into line below the new stop, aligned as desired.

The Tabs dialog box makes it a bit easier to realign tab stops. Rather than removing the misaligned tab and re-creating it with the proper alignment, all you have to do is select the misaligned tab stop from the list and click a different Alignment option. Click Set to confirm the change and then click OK to put it into effect. The text typed under the realigned tab never moves or falls out of line; it is simply realigned when you click OK to close the dialog box.

Chapter 7

Working with Long Documents

Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
URL:

How to…

- Add page numbers to long documents
- Use headers and footers to provide consistent page and file information throughout a document
- Break a document into distinct sections
- Build a table of contents
- Turn boring paragraph text into a newsletter with columns
- Search for and replace content throughout a long or complex document

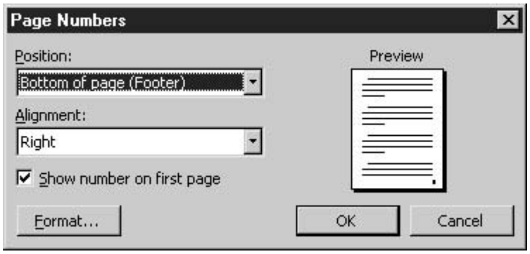
A document that exceeds two pages is considered long, in that it may require page numbers, it could need additional information to appear at the top and/or bottom of all the pages, and if it's a very long document—ten pages or more—you may need to add a table of contents to help people find specific information within the document. Another problem that a longer document presents is editing—what if you need to find every occurrence of a particular name, date, or term? You could wade through manually, or you could ask Word to find all the occurrences and change them for you—to some other name, date, or term, or to eliminate them altogether.

These challenges presented by a longer document are all easily handled with Word's considerable array of page-numbering, section-handling, and indexing tools. In this chapter, you'll learn to take a long document and turn it into a professional-looking, easily navigated work of word processing art.

Inserting and Formatting Page Numbers

Any document that exceeds a single page needs page numbers. Even a two-page letter should have a "2" on the second page (never put a number on the first page of business or personal letters). Longer documents need numbering for reasons that go beyond tradition and good correspondence etiquette—imagine that you have a six- or seven-page document in your hand and drop it on the floor. When you gather up all the pages, how would you put them back in the right order (without reading the text and piecing it together that way, which would take a long time)? You'd hope that the pages were numbers so you could easily re-collage the stack.

Inserting page numbers in Word is very easy. Simply choose Insert | Page Numbers and use the Page Numbers dialog box to choose where the numbers will appear, and whether there should be a number on the first page.

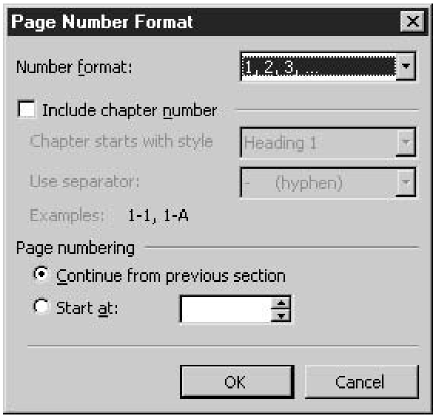


Position: Bottom of page (Footer)

Alignment: Right

☑ Show number on first page

If you click the Format button in the Page Numbers dialog box, the Page Number Format dialog box opens, enabling you to customize the type of numbers (Arabic, Roman, or letters) used to number your pages, add chapter numbers (such as 1-5 for Chapter 1, page 5), or change your starting page number. For typical business and personal letters, you probably won't need any of these options, but for long documents, especially those that combine multiple documents into one or that contain several chapters or sections, these options can be invaluable.



Number format: 1, 2, 3, ...

☐ Include chapter number

Chapter starts with style: Heading 1

Use separator: - (hyphen)

Examples: 1-1, 1-A

Page numbering

● Continue from previous section

○ Start at:

Working with Headers and Footers

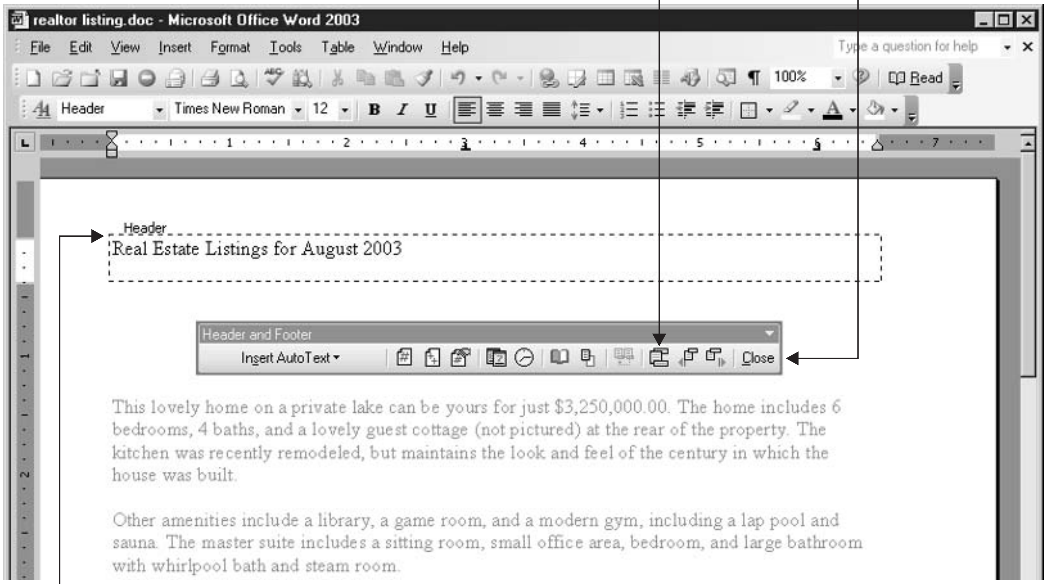
The headers and footers on a document are any text that's repeated across the top or bottom (respectively) of all the pages in that document. Typical header and footer content includes page numbers, document names, copyright information, chapter titles, or the date or time that the document was created or last edited. Long documents don't have to have headers or footers (beyond the default use of them incurred by using the Insert | Page Numbers command), but they can come in handy if you have chapters or sections within your document, or if, for example, you want to make sure your name, as the author, appears on every page.

The header and footer are on a layer separate from the text of your document. Any document, whether or not page numbers are ever applied, has two layers—the Header and Footer layer and the Document layer. Figure 7-1 shows the active header in a document, and the Document layer is dimmed.

TIP *You can adjust the distance between the header or footer and the edge of the paper by using the Page Setup dialog box. Choose File | Page Setup and click the Layout tab. In the From Edge section, adjust the measurement (half an inch, by default) that determines the distance for header and/or footer placement.*

Inserting Header and Footer Content

To view and edit the Header and Footer layer in your document, choose View | Header and Footer. This displays the Header and Footer toolbar and displays the first Header layer. By "first Header layer" I mean that if you have page numbers already inserted in the header (on the top of the


realtor listing.doc - Microsoft Office Word 2003
File
Edit
View
Insert
Format
Tools
Table
Window
Help
Type a question for help
100%
Read
Header
Times New Roman
12
Header
Header and Footer
Insert AutoText
Close

Real Estate Listings for August 2003

This lovely home on a private lake can be yours for just $3,250,000.00. The home includes 6 bedrooms, 4 baths, and a lovely guest cottage (not pictured) at the rear of the property. The kitchen was recently remodeled, but maintains the look and feel of the century in which the house was built.

Other amenities include a library, a game room, and a modern gym, including a lap pool and sauna. The master suite includes a sitting room, small office area, bedroom, and large bathroom with whirlpool bath and steam room.

Toggle to view the Header or Footer layer.

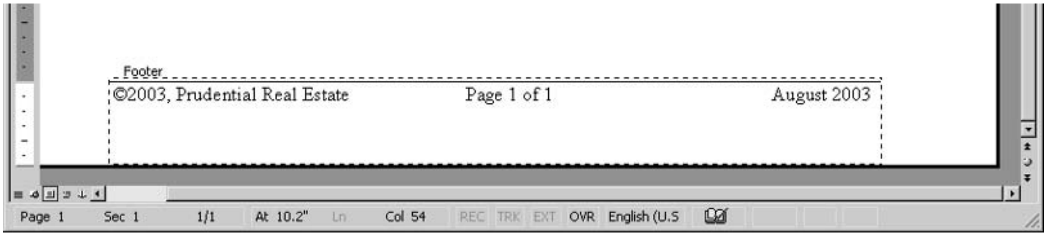
The Header and Footer toolbar appears when these layers are active.

Header

FIGURE 7-1 Apply or edit header and footer content using the Header and Footer layer of your document.

page) and have opted to not include them on the first page, you'll see that you have a First Page header, followed by a regular Header section. Using the buttons on the Header and Footer toolbar (see Figure 7-1), you can move from header to header and switch to your footers.

Once the Header and Footer layer is displayed, you can begin typing in either the header or the footer—simply go to the one you want to work with first and click inside the dashed box. The font and size of text is determined by the template in use—if it's the Normal template, Times New Roman in 12 points is the default. Your text is automatically left-aligned, but you'll see on Word's ruler that there are two tabs set. This allows you to have content on the left, in the center, and on the right side of the header or footer section. If you use the tabs, you'll find that your text typed under the center tab is center-aligned, and the text typed under the right tab is right-aligned.



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Once header and footer content is entered, you can edit it at any time by double-clicking it (while in the document layer) or by reselecting View | Header and Footer.

How to ... Use Section Breaks in a Long Document

Section breaks are like page breaks, except that they don't necessarily force text onto a new, following page. They are used primarily to "change the rules" in a document, allowing a variety of header or footer settings throughout (whereas there'd only be one set of headers and footers in an entire document) or to allow for multiple documents to be combined into one (and for each one to retain its own formatting, page numbers, and so on). To insert a section break, choose Insert | Break, and in the Section Break Types portion of the resulting dialog box, choose the type of break you need—Next Page (to insert a page break *and* a section break in one fell swoop), Continuous (to insert a break in the middle of a page without inserting a page break, too), Even Page (so that all even-numbered pages will be in one separate section), or Odd Page (so that all odd-numbered pages are in one separate section). Once there is a section break inserted, you'll see it reflected in the Header and Footer layer, as you'll have a separate header or footer for each section within the document.

Creating a Table of Contents

So you've got a document that's so long people need help navigating it or finding specific information within it. To help them, you can add a table of contents, created automatically by Word, to your document. It's a pretty simple process that requires just a few preparatory steps:

- Make sure you've applied the Heading 1 style to all the section headings you want to appear in your table of contents. For lower-level sections that you want to appear in the table of contents, use Heading 2 and Heading 3 styles and so on.
- Have your page numbers already inserted. This makes it possible to verify that the table of contents entries are accurate in terms of the page numbers that will print on your document.
- Check the wording of your section or chapter headings. Think of their appearance in the table of contents and try to keep them as clear and concise as possible.

With these preparations made, all you have to do is go to the page where you want the table of contents to appear (usually a blank page after the cover page and before the first page of the body of the document) and choose Insert | Reference | Index and Tables. In the resulting dialog box, click the Table of Contents tab (see Figure 7-2) and customize your table of contents using the options available.

TIP *Although the Heading 1, 2, and 3 styles are the default styles used to build table of contents entries, you can establish other styles and include them.*

Once your choices are made, click OK, and the table of contents appears before you, as shown in the following illustration, on the page where your cursor was blinking when you started the procedure. You can edit the table of contents as desired, or if you've made changes to your document and want to update the table of contents, select the entire table of contents and press F9—this "refresh" command causes the table of contents to be rebuilt, based on your original formatting, but with changes in content and page numbers to reflect the changes within your document.

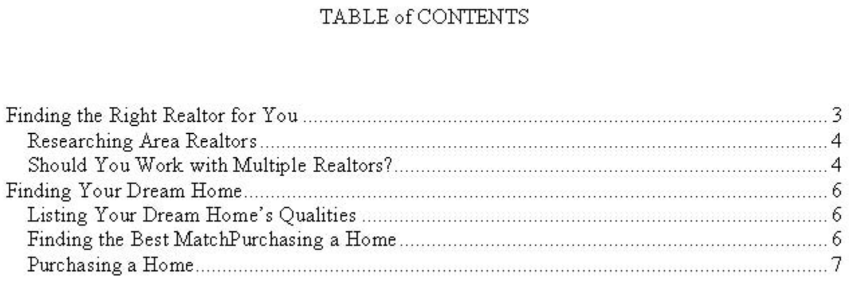
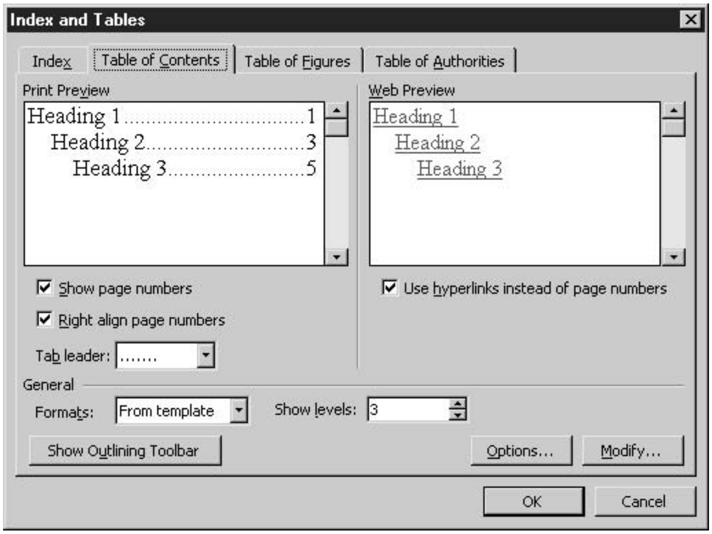


TABLE of CONTENTS

Finding the Right Realtor for You 3
  Researching Area Realtors 4
  Should You Work with Multiple Realtors? 4
Finding Your Dream Home 6
  Listing Your Dream Home's Qualities 6
  Finding the Best MatchPurchasing a Home 6
  Purchasing a Home 7


Index and Tables
Index
Table of Contents
Table of Figures
Table of Authorities
Print Preview
Web Preview
General
Show Outlining Toolbar
Options...
Modify...
OK
Cancel

Heading 1 1
Heading 2 3
Heading 3 5

Heading 1
Heading 2
Heading 3

☑ Show page numbers

☑ Right align page numbers

Tab leader: ....

☑ Use hyperlinks instead of page numbers

Formats: From template

Show levels: 3

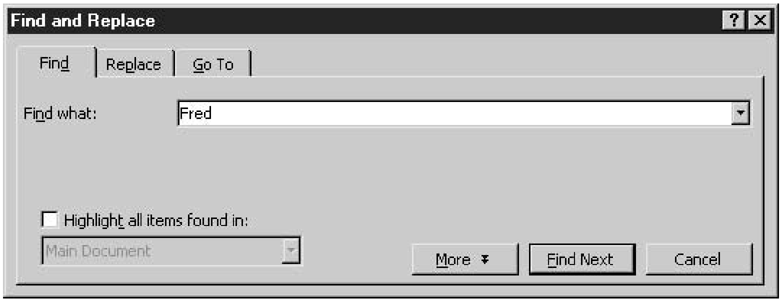
FIGURE 7-2 Make selections that will dictate the appearance of your table of contents.

Searching for and Replacing Document Content

Imagine this: Your company's 35-page employee manual contains several references to the Human Resources Director, Fred. That'd be great, except for the fact that Fred left three months ago, and now Julius is in charge of HR. What to do? Well, you could scroll through the document, page by page, looking for any text that mentions Fred directly, or you could let Word do the work for you.

Using Find to Move Through a Document

If all you want to do is go right to a particular reference in your document, choose Edit | Find to bring up the Find and Replace dialog box. In the Find What box on the Find tab, type what you're looking for:


Find and Replace
Find
Replace
Go To
More
Find Next
Cancel

Find what: Fred

☐ Highlight all items found in:

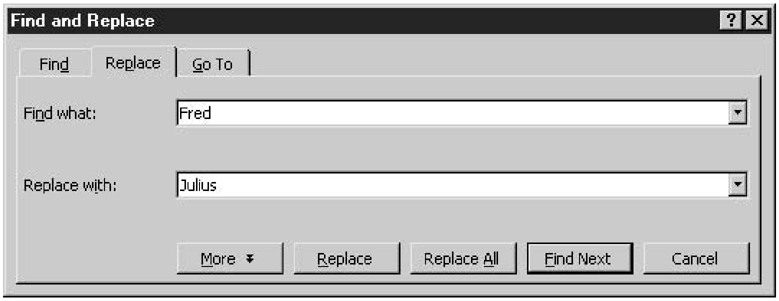
Main Document

Click the Find Next button and Word will move the cursor to the first occurrence of your Find What entry. If the entry appears more than once in the document, subsequent clicks of the Find Next button will show each one in succession. If there are no more occurrences of the entry (or if there were none to begin with), Word will prompt you that it can't find what you're looking for.

It's best to start your search at the beginning of your document. (Pressing CTRL-HOME moves your cursor there.) This will enable you to search the entire document, and not risk missing any occurrences of the item you seek to find and replace. Note that you can reposition the cursor even if you have already opened the Find and Replace dialog box.

Replacing Text

If, after finding what you wanted, you want to replace it with something else, Word makes this easy and relatively foolproof, too. Instead of Edit | Find, choose Edit | Replace, or while in the Find and Replace dialog box, click the Replace tab. From within this tab, you can type an entry to be inserted instead of any occurrences of the found content.



Find what: Fred

Replace with: Julius

The Replace feature can be used in one of two ways: item by item, deciding to replace or skip each occurrence as you come to it (the Replace button), or globally, where you let Word change all occurrences without any further intervention or guidance from you (the Replace All button). When you use the Replace All feature, Word prompts you with the number of replacements it made, and you can click OK to accept them.

TIP *Replace All is a relatively drastic measure. If you realize after doing it that you shouldn't have, press CTRL-Z or choose Edit | Undo (or click the Undo button) to revert all replacements to their pre-Replace All status.*

Replacing Special Codes

The letter, number, and punctuation/symbol keys on your keyboard aren't the only ones that add content to your document. Every key you press adds something, either characters that you can read and print, or codes that tell Word how to position or format the content of your document—

How to ... Refine a Search

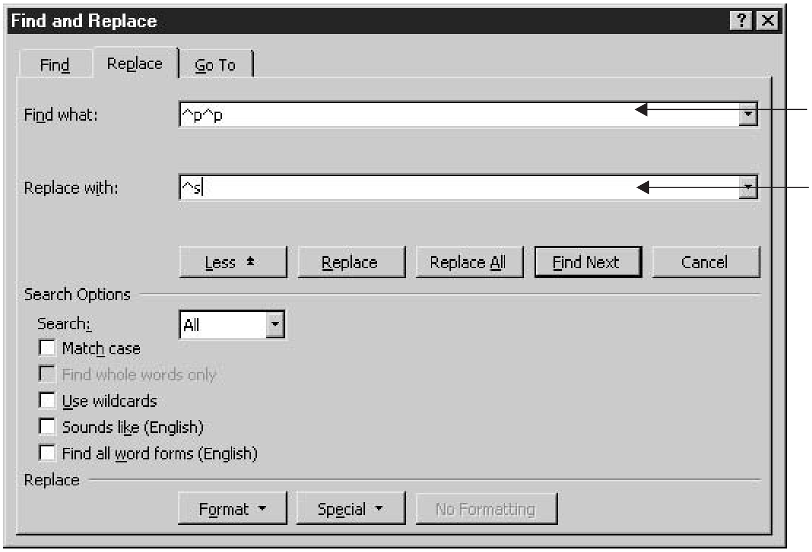
The Find and Replace dialog box gives you the ability to control the scope and results of your Find or Replace activities. Click the More button to access these options. You can use Match Case (which controls what's found or replaced, restricting it to occurrences that match the case of what you type in the Find What and/or Replace With boxes) or Find Whole Words Only, which will, for example, eliminate "Fred" being found if you're looking for "red." The Use Wildcards option allows you to type an asterisk (*) to represent the unknown. For example, if you want to find every date reference in your document that starts with January, type **January*** in the Find What box. The Sounds Like option will look for "Cathy" even if you typed "Kathy" in the Find What box, and Find All Word Forms will find run, running, and ran, no matter what form of the verb "run" you've entered for your Find What criteria.

you can see virtually all of them if you turn on Show/Hide (by clicking the Show/Hide button on the Standard toolbar). These codes (among others) can be found and replaced as needed, with just a step in addition to the ones you use to find and replace text:

1. With your cursor in the Find What box, click the More button. This button changes to a Less button, and the dialog box expands to offer more options, as shown in Figure 7-3.
2. When the dialog box expands to display more options, click the Special button. A list of document codes appears.
3. Click the special code(s) you want to search for. This could be two or more consecutive spaces, extra tabs, or perhaps two consecutive paragraph marks indicating excessive use of ENTER.
4. Click in the Replace With box and click the Special button again.
5. Select the special code the found codes should be replaced with.
6. Click Replace All to do a global replacement with no interaction from you, or use the Find Next and Replace buttons as needed to move through the document, replacing each found code with the established replacement code.

Working with Columns

If you've ever read a newspaper, you've seen columns—the text that flows vertically, in narrow strips. Placing text into columns gives you more layout options and makes it easier to integrate



Find what: ^p^p

Replace with: ^s

Search: All

☐ Match case
☐ Find whole words only
☐ Use wildcards
☐ Sounds like (English)
☐ Find all word forms (English)

Two paragraph mark codes

To be replaced by a single, nonbreaking space code

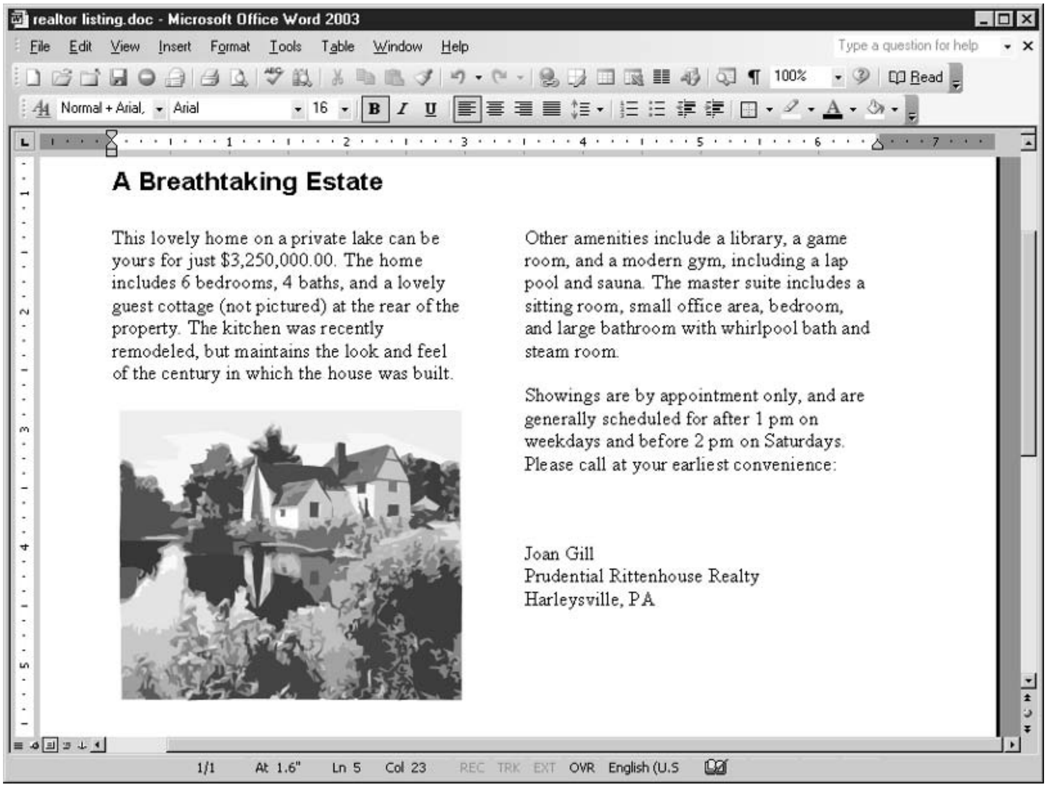
FIGURE 7-3 Expand the capabilities of Find and Replace by viewing more options.

graphics into the document's design. As shown in Figure 7-4, text and graphics are much more interesting to look at when placed into columns.

Building a Newsletter Document

To build a newsletter or other columnar document, you have two choices: You can type the text first and then apply the column formatting to the existing text, or you can set up the columns and then type the text. Your preference between these two options depends on several factors:

- Proofreading text is easier if the text is not in columns, because the eye can flow across single paragraphs that span the width of the page.
- If you type the text first, you can more easily select which text will be turned into columns. For example, you can leave the headline or newsletter title out of the column formatting by selecting the text that comes after it before setting up the columns.
- If you set up columns before typing the text, you can see your text flow into the columns as you type. For some users, this is helpful.
- Columns appear as they'll print only if you're in Print Layout view. If you prefer to type and edit in Normal view, you won't be able to see column-formatted text in snaking columns as you type.


realtor listing.doc - Microsoft Office Word 2003
File Edit View Insert Format Tools Table Window Help
Type a question for help
100%
Read
Normal + Arial, Arial 16
1/1 At 1.6" Ln 5 Col 23 REC TRK EXT OVR English (U.S

A Breathtaking Estate

This lovely home on a private lake can be yours for just $3,250,000.00. The home includes 6 bedrooms, 4 baths, and a lovely guest cottage (not pictured) at the rear of the property. The kitchen was recently remodeled, but maintains the look and feel of the century in which the house was built.

Other amenities include a library, a game room, and a modern gym, including a lap pool and sauna. The master suite includes a sitting room, small office area, bedroom, and large bathroom with whirlpool bath and steam room.

Showings are by appointment only, and are generally scheduled for after 1 pm on weekdays and before 2 pm on Saturdays. Please call at your earliest convenience:

Joan Gill
Prudential Rittenhouse Realty
Harleysville, PA

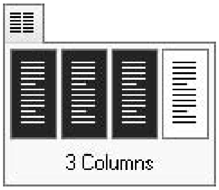
FIGURE 7-4 When text is placed in columns, the graphics, headlines, and body of articles are more interesting to look at.

Applying Columns to Existing Text

The process of converting existing text to columns is actually quite simple, and it's the same procedure—except for one step—that you'd employ to set up columns before typing. Here goes:

1. Select the text to be formatted in multiple columns. Be sure to select only the text and paragraph marks at the end of paragraphs that should be in columns, and not any that should not fall into columns.
2. Turn on columns using one of two methods outlined in the following steps.

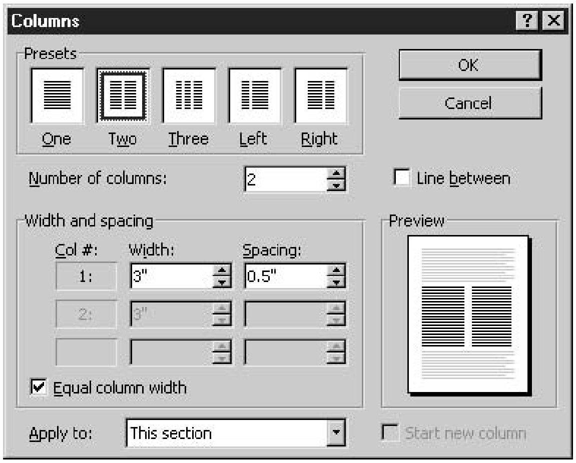
3. Click the Columns button on the Standard toolbar and drag through the resulting palette to select the number of columns to apply. The palette and a three-column configuration being selected is shown here:



4. Choose Format | Columns. In the resulting dialog box (see Figure 7-5), click the box for the number of columns desired and then click OK. By default, the columns will be of equal width.

Setting Up Columns Before Typing

If you prefer to see your text flow into columns as you type it, you can set columns at the current cursor location, then type the text that will flow into those columns as you've set them. You can do this the same way you'd set up columns for existing text, except that instead of selecting text first, you'll just click to position your cursor where the columns should begin going into effect. Then use the Columns button on the Standard toolbar, or use the Format | Columns dialog box, to set up the number of columns you want, and exactly how they should look. Once that's done, you can start typing and watch your text fill up the first column, flow into the second, and so on.



Number of columns: 2

☐ Line between

Width and spacing

Col #:	Width:	Spacing:
1:	3"	0.5"
2:	3"	

☑ Equal column width

Apply to: This section

☐ Start new column

FIGURE 7-5 Use the Columns dialog box to take a more methodical approach.

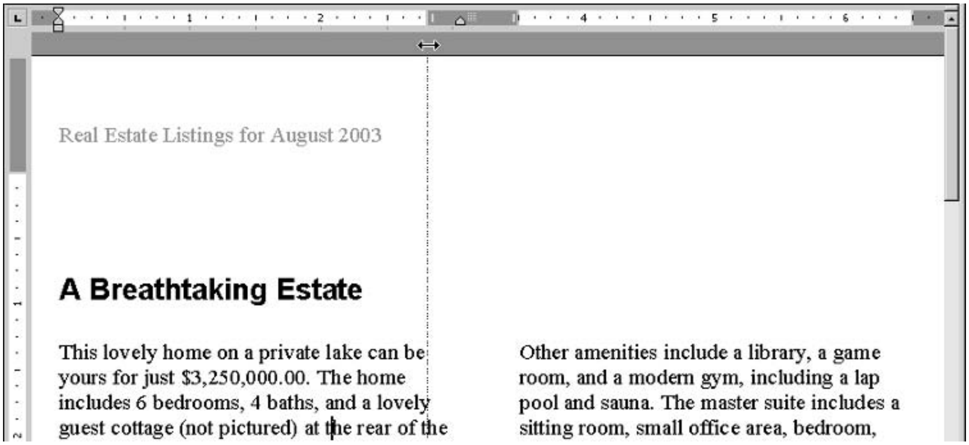
Customizing Columns

When you use the Columns button on the Standard toolbar, you don't have much choice in how the columns are set up. You can choose how many columns you'll have, but their width will be equal and dictated by the width of your page within the left and right margins. If you've set up columns using this button, you aren't stuck with their settings. Similarly, if you used the Columns dialog box but simply chose the number of columns and clicked OK without making any adjustments, you don't have to live with their settings. You can change the number of columns, adjust column width, and even add a vertical line between columns. How? Try the following techniques.

To change the width of columns, use the ruler. With your cursor inside column-formatted text, look at the ruler and note the gray sections between the white sections. These gray portions represent the space between columns, as shown in Figure 7-6. You can resize these portions by dragging their ends with your mouse. When your mouse turns into a two-headed arrow on either end of the gray section, drag it and release it when you've achieved the desired column width. You might have to do this to both columns if you want to change both.

Using the ruler really requires adjustments be made "by eye." If you want to make changes more exact, use the Columns dialog box. Through this dialog box you can pick a new number of columns, set the width of all the columns to a new uniform width, or make an individual column different from the others. You can also add a vertical line between columns, which can be helpful on a crowded page if you think people's eyes might wander instead of following the vertical flow of the columns.

If you want to make adjustments to more than one column, select all the columns you want to deal with through the Columns dialog box. If your entire document is set to the same column



Real Estate Listings for August 2003

A Breathtaking Estate

This lovely home on a private lake can be yours for just $3,250,000.00. The home includes 6 bedrooms, 4 baths, and a lovely guest cottage (not pictured) at the rear of the

Other amenities include a library, a game room, and a modern gym, including a lap pool and sauna. The master suite includes a sitting room, small office area, bedroom,

FIGURE 7-6 For quick column-width adjustments, use the ruler and your mouse.

format, press CTRL-A to select everything, or use your mouse to drag through the columns on one page to make sure your changes will apply only to a specific range of text.

Setting Up Multiple Column Configurations in One Document

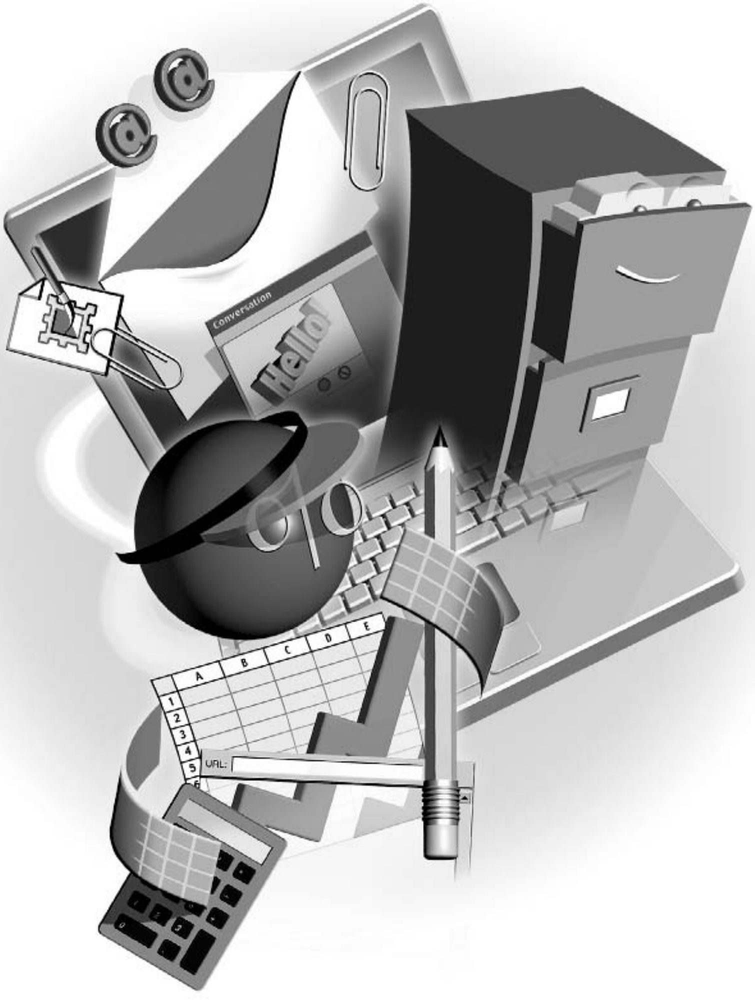
There's no rule that says if you have two columns on page 1 that you must have two columns throughout your document. You can have a different number of columns on each page of your document, or even on a single page. The key to setting up columns throughout your document is to make it clear to Word where your various settings begin and end. Of course, this is much easier if your text is already typed, because having existing text makes it possible to select just the text you want in two columns (for example) and leave out the text that should stay as it is.

To indicate that a paragraph or series of paragraphs should be formatted with columns, select the text, then apply the column formatting. If the next paragraph or series of paragraphs should be in a single column (we think of that as *no* columns), you can leave that text as is. If the next text should be in three columns, select it and apply three columns to it. It's really that simple, and the only possible problem you'll run into is selecting the wrong text or applying a number of columns you didn't want.

TIP *Paragraph marks are important when you're selecting text to be placed in columns. Why? Because the paragraph mark at the end of a paragraph holds all the formatting information about the text that precedes it; therefore, if you want to place a paragraph in columns, you need to select the paragraph mark at the end of that text before you set up the columns or make changes to the existing column configuration. To be sure you're selecting the paragraph mark along with the text, click the Show/Hide button on the Standard toolbar.*

Chapter 8

Structuring Documents with Tables



Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
URL:

How to…

- Build a uniform table grid to house text and graphics
- Structure a document with table columns and rows
- Format a table with borders and shading
- Draw a free-form table
- Nest a table inside another table's cell

Here's a strong statement: Tables might be the most powerful feature in Word. Why? Because you can use them to do everything from building simple column lists to laying out an entire document, eliminating the need to set and maintain tabs and indents. From a basic letter that contains a multicolumn list to an elaborate document such as a resume or report, tables make setting up, building, and controlling the placement of text on a document easy, and they give you considerable power over the appearance of your document.

Structuring Documents and Text with Tables

Tables are containers for your text and graphics. Rather than typing in the open territory of a blank line, you can house your content in a table's *cells*. The size of the cell controls the flow of text (especially effective for paragraphs), and the placement of the cell controls the location of the table content. As shown in Figure 8-1, a table makes it possible to not only structure a document (a resume, in this case) but to place text and graphics side by side and to control the size and shape of paragraph text.

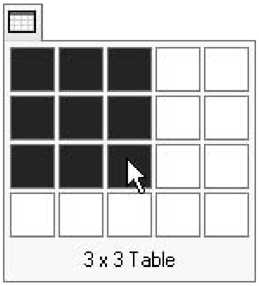
Word gives you two ways to build a table: You can create a uniform grid or a freeform cluster of cells, as shown in Figure 8-2. You can even create a single table cell to stand on its own using either method. I'll start by showing you how to create the uniform table, because it's the most commonly used table feature, and you'll find it applicable in most situations. Freeform tables will be covered later in the chapter.

Building a Uniform Grid

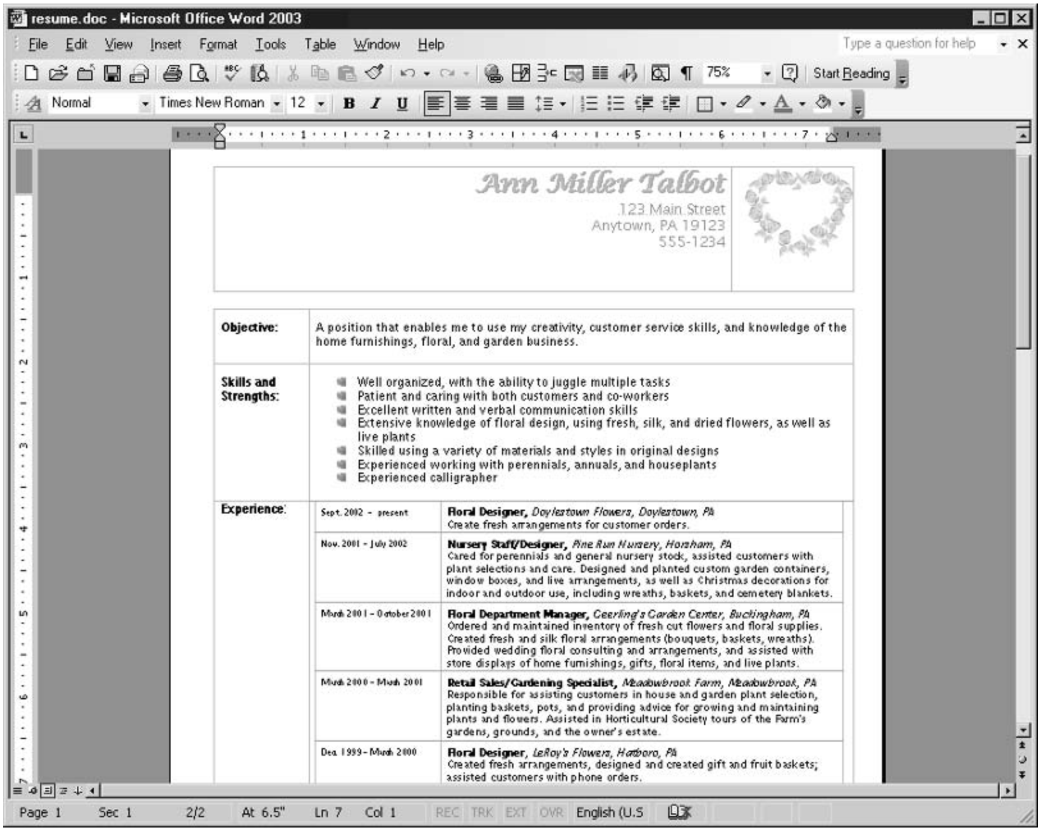
You can build a uniform grid in two ways—using Word's Insert Table tool on the toolbar or using the Insert Table dialog box. Which one should you use? The end result is the same, so it's your procedural preference that matters. The toolbar method is quick and easy, but the dialog box provides additional tools for customizing the way the table looks.

Inserting a Table from the Toolbar

The Insert Table button presents a grid that you drag through with your mouse. As shown in the following illustration, you drag across the grid to indicate the number of columns your table needs, and you drag down to set the number of rows.



The grid expands as you drag, so you're not restricted to a 5×5 table. As soon as you release your mouse, the tool's grid disappears, and a table appears on your page, at the cursor.



Ann Miller Talbot
123 Main Street
Anytown, PA 19123
555-1234

Objective:	A position that enables me to use my creativity, customer service skills, and knowledge of the home furnishings, floral, and garden business.	
Skills and Strengths:	Well organized, with the ability to juggle multiple tasks Patient and caring with both customers and co-workers Excellent written and verbal communication skills Extensive knowledge of floral design, using fresh, silk, and dried flowers, as well as live plants Skilled using a variety of materials and styles in original designs Experienced working with perennials, annuals, and houseplants Experienced calligrapher	
Experience:	Sept. 2002 – present	**Floral Designer,** *Doylestown Flowers, Doylestown, PA* Create fresh arrangements for customer orders.
	Nov. 2001 – July 2002	**Nursery Staff/Designer,** *Pine Run Nursery, Horsham, PA* Cared for perennials and general nursery stock, assisted customers with plant selections and care. Designed and planted custom garden containers, window boxes, and live arrangements, as well as Christmas decorations for indoor and outdoor use, including wreaths, baskets, and cemetery blankets.
	March 2001 – October 2001	**Floral Department Manager,** *Geerling's Garden Center, Buckingham, PA* Ordered and maintained inventory of fresh cut flowers and floral supplies. Created fresh and silk floral arrangements (bouquets, baskets, wreaths). Provided wedding floral consulting and arrangements, and assisted with store displays of home furnishings, gifts, floral items, and live plants.
	March 2000 – March 2001	**Retail Sales/Gardening Specialist,** *Meadowbrook Farm, Meadowbrook, PA* Responsible for assisting customers in house and garden plant selection, planting baskets, pots, and providing advice for growing and maintaining plants and flowers. Assisted in Horticultural Society tours of the Farm's gardens, grounds, and the owner's estate.
	Dec. 1999 – March 2000	**Floral Designer**, *LeRoy's Flowers, Hatboro, PA* Created fresh arrangements, designed and created gift and fruit baskets; assisted customers with phone orders.

FIGURE 8-1 Build a grid that suits the needs for a selected portion of your document content.

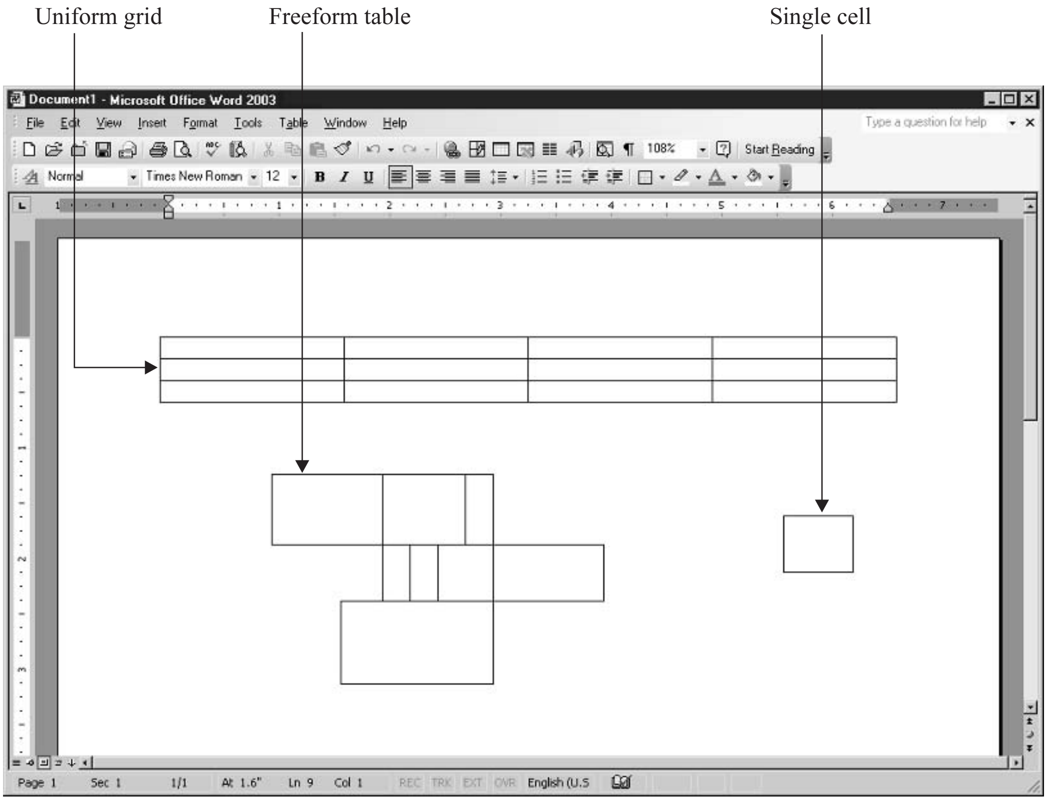
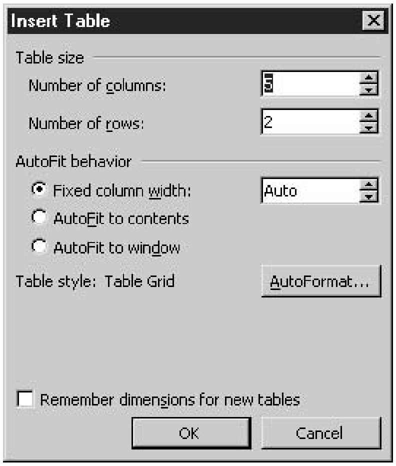

Uniform grid
Freeform table
Single cell
Document1 - Microsoft Office Word 2003
File Edit View Insert Format Tools Table Window Help
Type a question for help
108%
Start Reading
Normal
Times New Roman
12
Page 1 Sec 1 1/1 At 1.6" Ln 9 Col 1 REC TRK EXT OVR English (U.S

FIGURE 8-2 Word's table features enable you to make layout choices you never thought possible.

Using the Insert Table Dialog Box

To use the Insert Table dialog box, choose Table | Insert | Table. The dialog box, shown next, provides options for setting the number of columns and rows, as well as for controlling the relative size and position of those table elements.



Number of columns: 5

Number of rows: 2

● Fixed column width: Auto

○ AutoFit to contents

○ AutoFit to window

Table style: Table Grid

☐ Remember dimensions for new tables

Your table options in this dialog box are as follows:

- **Table Size** Using the Number of Columns and Number of Rows boxes, enter the dimensions of your table.
- **AutoFit Behavior** You have three options here: Fixed Column Width, which you can set to Auto or any measurement you want; AutoFit to Contents, which will cause the table cells to grow and shrink to match the width and height of the text and graphics you place in them; and AutoFit to Window, which is especially useful for documents that will be viewed onscreen rather than on paper.
- **Table Style** The table style is Table Grid by default, and you can click the AutoFormat button to open a dialog box filled with preset table formats—border styles, shading colors, fonts, and table layouts.
- **Remember Dimensions for New Tables** Click this check box to save your current settings, making them the default for each new table created with the Insert Table dialog box.

Entering Table Content

Now that you have a table, it's time to put things in it, such as text and graphics, and fill its cells with the document content you need to control. To begin entering your table content, click inside the first cell you want to fill with content and begin typing or use the Insert menu's commands to add graphic elements.

If you're typing paragraph text, just keep typing in the desired cell, allowing the text to wrap within the confines of the cell. You can adjust the cell's width or height later, and you can even adjust the internal cell margins if you want to. To get started, just get the content into the cell and worry about formatting later. You can type in a table cell just as you would on the page, except the text will wrap to the table's walls, rather than to the page margins.

When you're ready to begin entering content in the next cell, press TAB to move to that cell. Continued pressing of TAB will move you from cell to cell, going left to right within the current row. When you get to the end of the current row, TAB will take you to the first cell in the next row. If you're in the last cell of the table, TAB does a very cool thing: It gives you a new row! It's that easy to add rows to your table. Just go to the last cell and press TAB. You'll learn more about using this technique and others for changing the dimensions of your table later in this chapter.

You can also click in a particular cell with your mouse, or while the cells are empty, you can use the arrow keys to move around—up, down, left, and right. Once the cells have content, the arrow keys will move among the text first, then only when you've gone to the beginning or end of the text will the arrow keys move you out of the current cell.

TIP *Because TAB works differently when you're in a table, if you need to insert an actual tab (say, to indent the first line of a paragraph in a table cell), press CTRL-TAB.*

Navigating a Table

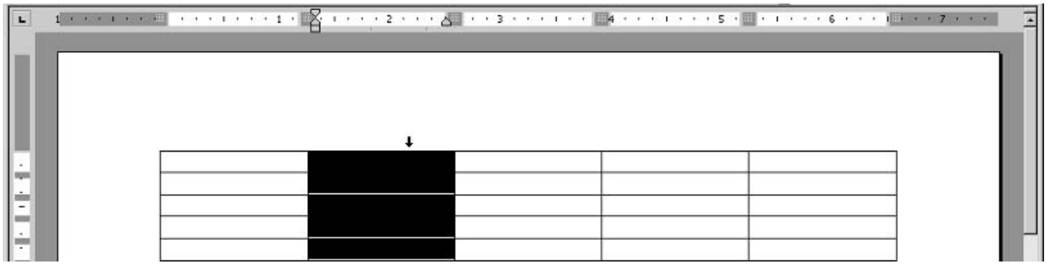
Yes, TAB is the primary tool for moving around in a table, but there are some other navigational techniques you might find handy:

- To move backward (right to left), press SHIFT-TAB.
- To move to the first cell in a row, press ALT-HOME.
- To move to the last cell in a row, press ALT-END.
- To move to the first cell in a column, press ALT-PAGE UP.
- To move to the last cell in a column, press ALT-PAGE DOWN.

Selecting Table Columns, Rows, and Cells

To enter table content, you need only be in the cell, you don't need to select it. If, on the other hand, you want to format a particular cell or specify a column, row, or contiguous group thereof, you'll need to select them. Try these techniques:

- Select a cell by pointing to the lower-left corner of the cell. Your mouse turns to a right-pointing arrow. Click your mouse, and the cell is selected.
- Select an entire column by hovering your mouse above the column, just outside the table. When you point just above the column's top cell wall, your mouse pointer turns to a black, down-pointing arrow. Click your mouse, and the entire column is selected.



- Select an entire row by pointing to the left side of the first cell in the row (in the left margin). When your mouse turns to a right-pointing arrow, click, and the entire row is selected.
- To select a block of cells, click inside one of them and drag through the rest until the desired block is selected.
- To select multiple columns or rows, follow the instructions for selecting a single column or row. With your mouse in position for a single column or row selection, drag left or right to select more columns, or up or down to select more rows.
- To select the entire table, choose Table | Select | Table. Your cursor must be in the table in order for this command to work. You can use the Table | Select submenu to select columns and rows, too.

Formatting Tables

As I've said, you can apply any formatting you want to the text in your table. Use the Formatting toolbar and the Font and Paragraph dialog boxes to manipulate the appearance of your text, just as you would when formatting text that's not in a table. When it comes to formatting the table itself, however, there are some task-specific tools you should be aware of:

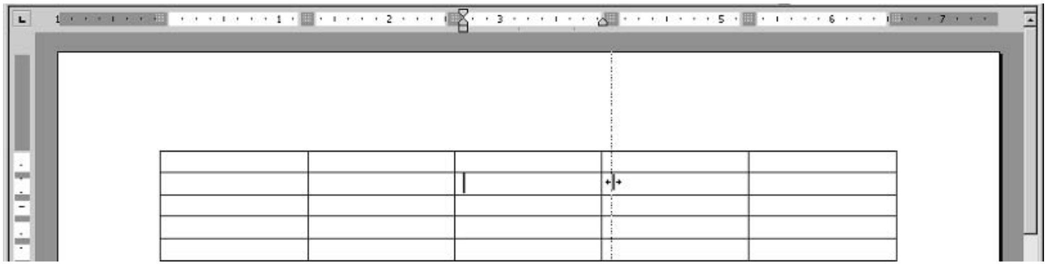
- **The Table menu** This menu contains all the tools, commands, and submenus you need for changing the size, dimensions (number of columns and rows), and appearance of your table and its cells.
- **The Shading tool** Found on the Formatting toolbar, use this tool to shade individual cells, entire rows or columns, or the whole table.
- **The Borders tool** This tool is also found on the Formatting toolbar. By default, your table has a hairline black border. You can turn borders off and turn borders back on for specific cells.
- **The Borders and Shading dialog box** Choose Format | Borders and Shading to open this dialog box. Assuming you're in the table when you do so, any changes you make within the dialog box (using its Shading and Borders tabs) will apply to the table.

Resizing Columns and Rows

Most tables need a little tweaking in terms of the width of columns or cells or the height of rows. You should do most of your sizing after entering or inserting the content, however, if only so that you can see what adjustments are required—you may not be able to tell when the table is empty or only partially filled.

To adjust your table's columns, rows, or individual cells, try these techniques:

- *Drag column and row walls with your mouse*. To adjust a column's width, point to the column's wall (as shown here) and then drag when your mouse turns into a horizontal two-headed arrow. Drag outward to widen the cell or inward to narrow it. Adjusting row height works the same way, but be sure to point to the top or bottom wall of the row and look for a vertical two-headed arrow before you drag to resize.



- *Set a specific measurement through Table Properties*. Select the column or row that you want to resize (drag through the cells in that column or row) and choose Table | Table Properties. In the resulting dialog box, click the appropriate tab—Column or Row. These tabs allow you to set specific measurements by typing or using the spinner triangles.

TIP *Yes, there's a Cell tab in the Table Properties dialog box, but if you make adjustments to an individual cell, the entire row and/or column containing that cell will be adjusted as well—unless you have that cell selected. If your cursor is merely in the cell, then the column and/or row will be adjusted, too.*

Restoring Table Defaults and Uniformity

If you've resized your columns and rows and wish you could go back to the uniform grid where all your cells were the same size and/or the columns and rows were the same width and height, you can undo your resizing actions by using the Undo button, or you can choose Table | AutoFit. From the AutoFit submenu, choose from the same automatic sizing options you saw in the Insert Table dialog box. You can make the table fit the contents or fit the page, or you can enter a fixed width for all the columns (rows, as I said, will size to fit the amount of text typed into them). You can also choose Distribute Columns Evenly or Distribute Rows Evenly, which will make all the columns or rows the same size across the entire table. The uniform size will be based on the cell with the most content. That cell will be sized to fit what's inside it, and the other cells will be resized to match it, even if they're empty.

Setting Cell Margins and Spacing

Cell margins can be set for your entire table, making it easier to create distance between cell content and the cell's walls—especially important if you have borders turned on. Choose Table |

Table Properties and click the Table tab. On that tab, click the Options button to set margins for all four sides of the selected cell(s), as shown in Figure 8-3. You can also set spacing between cells, which will create an interesting effect if you shade your cells or apply borders to them later.

NOTE *Whatever selections you make in the Table tab of the Table Properties dialog box or through the Table Options dialog box will affect your entire table. Don't use these dialog boxes to make changes to individual cells. If you need to treat a section of a table differently in terms of margins or spacing, consider nesting a table inside another table's cell. The technique for this approach is discussed later in this chapter.*

Adding and Deleting Columns and Rows

Just as your table cell dimensions might not be right for your table content, the table dimensions might need some tweaking after you've built the table. The most common problem you'll run into is not having enough columns, normally due to forgetting one of the data categories you wanted to store in the table. You can choose from these methods to make the changes you need:

- Select the column to the right of where you want a new column and click the Insert Column button on the Standard toolbar and a new column is added to the *left* of the selected column. (You'll notice that the Insert Table button changes to an Insert Column or Row button depending on what you have selected.) To insert a row with this method, select the row below where you want the new row, click the Insert Row button, and a new row is added *above*.
- Click in a cell in the column to the right of where the new column should be or in the row below the spot where a new row is needed. Choose Table | Insert and then from the submenu choose Columns to the Left, Columns to the Right, Rows Above, or Rows Below.

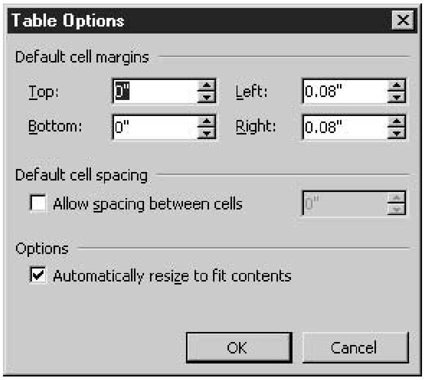


Table Options

Default cell margins

Top: 0"
Left: 0.08"
Bottom: 0"
Right: 0.08"

Default cell spacing

☐ Allow spacing between cells 0"

Options

☑ Automatically resize to fit contents

FIGURE 8-3 The Table Options dialog box allows you to set margins and spacing between table cells.

- To insert multiple columns or rows, you can repeat either of these methods until the desired number of columns or rows is added, or you can select a number of existing columns or rows equal to the number of new ones you need before inserting the new columns or rows.

Deleting parts of your table is just as easy as adding columns and rows. To get rid of a column, just select it or be in any cell within that column. From the Table menu, choose Delete | Columns. You can do the same thing for rows. Click in any cell in the row, or select the entire row, and then choose Table | Delete | Rows. To delete multiple columns or rows, select them first and then issue the Table | Delete command.

When you delete individual cells, a dialog box opens, asking what you'd like to do with regard to any surrounding content. Your choices are to shift the cells up, down, left, and right. The choices offered will depend on the position of the cell being deleted and the table that will remain after the deletion. You can also choose to delete the entire row or column containing the cell, which you might decide to do if the shifting options will create chaos in your table.

TIP *While a column or row is selected, right-click any cell in the selected block and choose Insert Columns or Insert Rows from the resulting shortcut menu. You can also choose Delete Cells, which opens a dialog box of deletion options. You can delete an entire table by clicking in any cell of the table and choosing Table | Delete Table.*

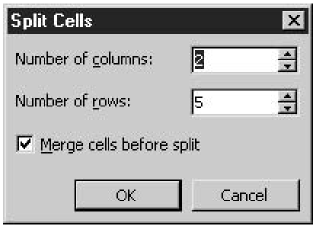
Splitting and Merging Cells

Another way to change your table's dimensions is to split and merge its cells. As the terms indicate, splitting a cell takes a single cell and breaks it into two or more cells, whereas merging cells takes two or more cells and joins them into a single cell.

When splitting cells, you can select a single cell by clicking inside it, or you can select an entire row or column. If you select an entire row or column, every cell in it will be split into the number of cells you specify. Merging cells can be performed only if two or more contiguous cells are selected before you issue the command. In fact, the Merge Cells command will be dimmed in the Table menu if you don't have two or more cells selected.

Splitting Cells to Increase Table Dimensions

Splitting cells is quite simple. Just click inside a single cell or select a row or column and then choose Table | Split Cells. The Split Cells dialog box opens, as shown here:

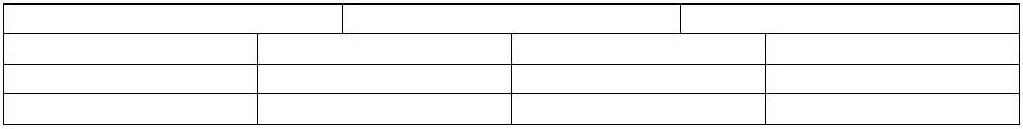


Number of columns: 2

Number of rows: 5

☑ Merge cells before split

By default, the Merge Cells Before Split option is selected in this dialog box. This means that if you have more than one cell selected (a block, column, or row), the cells will be merged into one cell and then split into the number of columns and rows you specify. The following shows a three-column, two-row table with one of the rows split into three rows and four columns.



Merging Cells to Consolidate Table Structure

When you merge cells, you're combining them. To merge cells, simply select the cells you want to merge and then choose Table | Merge Cells. Much simpler than splitting, the merge process does one thing: It creates a single cell where there were multiple cells. This command is extremely handy when you need a title row for a table, as shown in the example here. This two-column table's first row was merged into one long cell, a perfect home for the text that identifies the table's purpose.

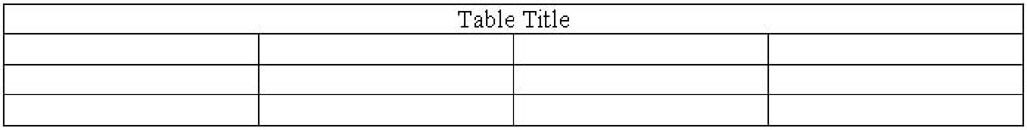


Table Title

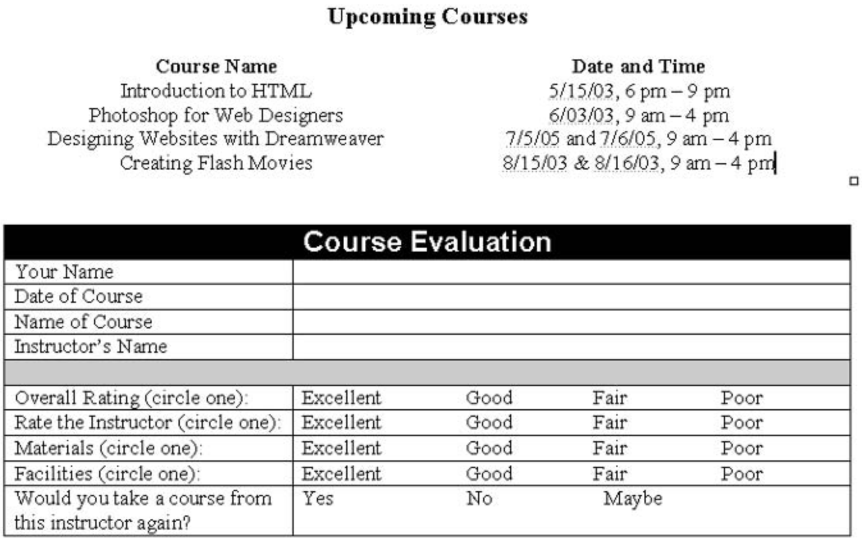
Applying Borders and Shading

When you use tables purely to provide a grid structure for your text or to lay out a document, you won't want to call attention to the table itself. You won't want to include borders, and you won't want any color in the table cells. If your document will be viewed onscreen, you can turn off the guidelines that indicate that a table's in use, too.

If, on the other hand, you want to take full advantage of the table's existence and apply borders and even shading to all or some of the table, you can easily do so, turning the table into a graphical element as well as a structural device. Figure 8-4 shows two tables—one with borders, and one without. In the table with borders and shading, these formatting elements have been placed strategically to enhance the document's usefulness and to make it more visually appealing.

Turning Borders On and Off

By default, all tables start out with a hairline border. You can turn this border off entirely, or you can turn it off for portions of the table, leaving it on in other portions. You can also apply different



Upcoming Courses

Course Name	**Date and Time**
Introduction to HTML	5/15/03, 6 pm – 9 pm
Photoshop for Web Designers	6/03/03, 9 am – 4 pm
Designing Websites with Dreamweaver	7/5/05 and 7/6/05, 9 am – 4 pm
Creating Flash Movies	8/15/03 & 8/16/03, 9 am – 4 pm

Course Evaluation

Your Name				
Date of Course				
Name of Course				
Instructor's Name				
Overall Rating (circle one):	Excellent	Good	Fair	Poor
Rate the Instructor (circle one):	Excellent	Good	Fair	Poor
Materials (circle one):	Excellent	Good	Fair	Poor
Facilities (circle one):	Excellent	Good	Fair	Poor
Would you take a course from this instructor again?	Yes	No	Maybe	

FIGURE 8-4 The content and nature of your table will dictate whether to use borders and shading.

border colors and thicknesses to some or all of your table. Word gives you several tools to control the placement and appearance of table borders:

- **The Border tool on the Formatting toolbar** Click the drop-down triangle next to this button to see a palette of borders—top, bottom, left, right, inside, outside, and even diagonal.
- **The Borders and Shading dialog box** This dialog box provides "one-stop shopping" for all the things you can do with, or to, a border.

Obviously, it's very easy to turn borders off or to turn them all on for the entire table. What might be a little more difficult the first time is applying or changing borders for a specific part of a table. The key is to turn off all the borders on the table and then go back and turn them on for selected cells. This enables you to consider each cell individually and choose the appropriate border. It can be very confusing to leave borders on and turn them off in certain areas, so try what might seem like a backward approach. You should find it to be quite effective.

TIP

It can be hard to tell which borders are on and which are off if the table gridlines (nonprinting cell wall indicators) are on. To turn them off, choose Table | Hide Gridlines; however, if you find (as I do) that having the gridlines hidden makes it hard to locate and select individual cells or find cell walls in order to resize columns and rows with your mouse, you can turn them back on by choosing Table | Show Gridlines.

Shading Table Cells

Shading draws attention to particular cells, or in the case of forms it can warn users away from filling in certain parts of the document. Shading adds color, or at least shades of gray (if you're printing in black and white), so it adds visual interest to a table. You can add shading to an individual cell or any selected block of cells, including individual columns and rows. To add shading to a table, choose either of the following methods:

- Click the Shading Color button on the Formatting toolbar and choose a color from the resulting palette. You can access additional colors and color-creation tools by clicking More Colors at the bottom of the palette.
- Choose Format | Borders and Shading and click the Shading tab. On this tab, you see the same palette as offered through the Shading Color tool, plus you can choose from a variety of patterns—from shades of gray to striped and dotted fills.

SHORTCUT *A quick way to select the whole table is to hover your mouse above and to the left of the first cell. When a block with a four-headed arrow appears, click that block, and the entire table is selected. Once the whole table is selected, any formatting you apply will apply to the entire table.*

Drawing a Freeform Table

What if you need the structure that a table offers, but you don't want the uniformity of a grid? You could manipulate a uniform table and end up with a table that's anything but uniform, but that can require a lot of effort—merging and splitting cells, adjusting the dimensions of individual cells, and so on. If you have a mental picture of the sort of table you need—perhaps one with one long cell across the top and several columns beneath it, each with a different number of cells in it—you can easily draw it using Word's freeform table tools, eliminating the need to change a uniform table into something else. The tool also makes it easy to create single-cell tables, useful when you need a block in which to confine text and/or graphics within your main document text. When you use Word's freeform table tools, you'll be starting with the table that you need!

The Draw Table button was on the Standard toolbar in Office XP, but in Office 2003 it has been relegated to the Tables and Borders toolbar, which you can display by right-clicking any toolbar or menu and choosing Tables and Borders from the shortcut menu. When you click the button, your mouse pointer turns to a pencil, and you can draw your table, cell by cell, adding rows and columns, even stray cells that aren't part of a column or row, all by dragging your mouse on the page.

Drawing Table Cells

To draw a table cell, simply click and drag to draw a rectangle where you want your first cell. A dashed line, forming a box, will follow your mouse as you draw. You can draw more cells attached to that first cell by dragging to draw more boxes alongside the first cell or by subdividing the first cell into smaller cells. Figure 8-5 shows a freeform table in progress.

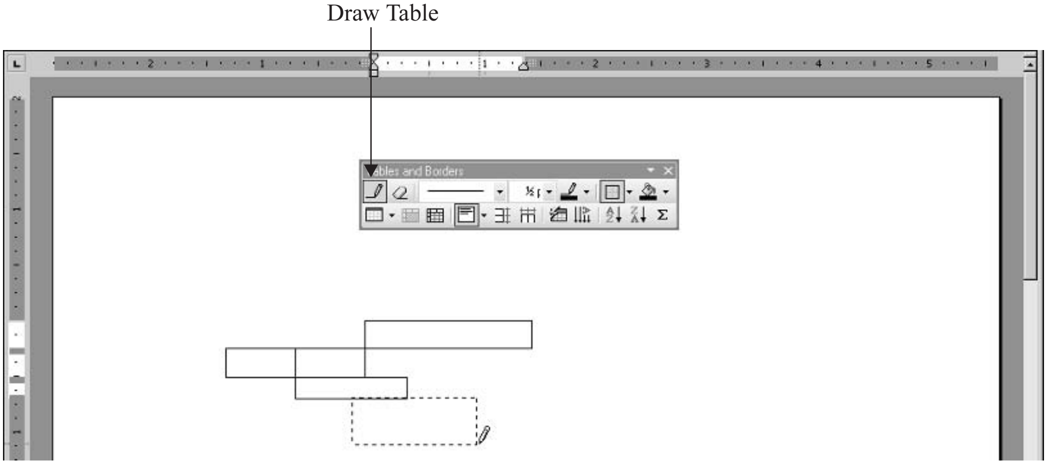
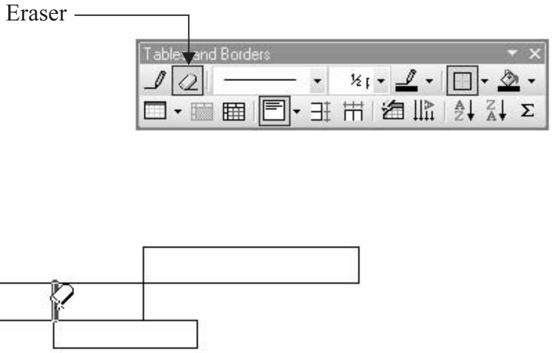


FIGURE 8-5 Draw the cells you want, in the configuration and size you need.

Erasing Table Cell Walls

Unlike the menu commands required to reduce the number of columns and rows in a uniform grid table, you can simply erase walls and cells within a freeform table by using the Eraser tool on the Tables and Borders toolbar. You can use it to literally scrub out existing cell walls. This can simulate a merge, removing a wall between two cells and turning them into one larger cell, or it can remove an entire row or column, depending on how many cell walls you erase.



You can also use the Eraser to remove borders. Drag the Eraser along a wall, and the border will disappear. You might find in your clicking and dragging of the Eraser that you've removed a wall when you wanted to get rid of just its border, or that you've removed a border when you really wanted to get rid of a wall. Mastering the use of the Draw Table tool and its companion, the Eraser, is a matter of understanding table structure. You can't remove a wall if it's shared by other cells that have not yet been removed. Inner walls that simply break a single cell into multiple cells can be removed, but an outside wall of an otherwise intact cell cannot be erased. Using the Eraser on such a wall will remove only its border.

CAUTION *Be sure to turn the Eraser off after you're finished using it. If you don't click it again to toggle it off, you risk erasing large portions of your table as you attempt to select cells or drag through text with the intention of formatting it.*

Working with the Tables and Borders Toolbar

Once you've created a table, either through the Insert Table tool or dialog box, or by drawing a free-form table with the Draw Table tool, you can use the Tables and Borders toolbar to customize it. You can change the line-style and thickness of your table borders, apply colored fills, change column width and row heights, sort your table's content, and even perform calculations using numeric content within your table's cells.

Applying Border Styles

For quick application of border styles and thicknesses, you can use the Tables and Borders toolbar to draw new borders onto an existing table. On a document with a table, display the Tables and Borders toolbar and use the Line Style and Line Weight buttons to choose the type of line (thick, dashed, double) and how thick it will be. Once your selections are made, your mouse pointer turns into a pencil, and you can drag over the cell walls (or existing borders) to draw the new format directly onto the table. You can also change the color of borders by clicking the drop-down triangle next to the Border Color button.

When applying color to existing borders, simply select a color and with your pencil mouse pointer (it should appear as soon as you've made your color selection) click the cell walls you want to color. This can be somewhat time-consuming, especially if you want to apply the same color to all the borders in your table. It's a great approach for coloring some of your table's borders, but if you want to color the whole table, click once on the Border Color button (not on the drop-down triangle), and the Borders and Shading dialog box opens, with the Border tab in front.

To pick a single color for all your table's borders, click the Color option, choose a color from the palette, and then click OK. The color will be applied to the entire table—to every wall of every cell that currently has a border displayed.

Changing Table Size, Dimension, and Alignment

The Tables and Borders toolbar offers tools for changing the number of cells, columns, and rows in your table, as well as the ability to alter the width of columns and rows and change the way text or graphic content is aligned within them. These tools are detailed in Table 8-1.

The Tables and Borders toolbar includes a button that looks like an A on its side; this is the Change Text Direction button. If your column headings (or row labels) are too wide for the width

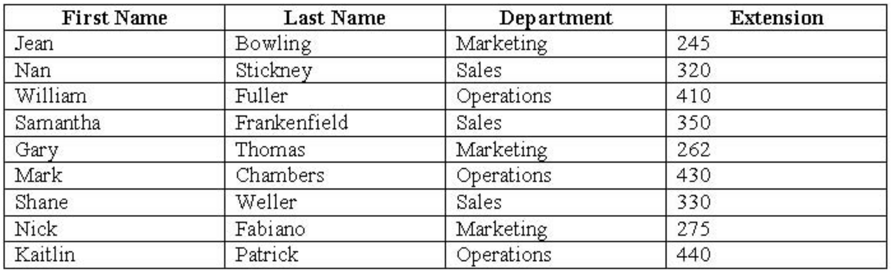
Button	Function
	Select two or more contiguous cells in the table and click this button to merge the cells.
	Select a single cell and click this button to break it into two or more cells. You can also select a block of cells and use the resulting dialog box to choose how many rows and columns to create from your selected table cell(s).
	This button makes all your columns the same width. No need to select the columns—just put your cursor anywhere in the table.
	If you need all your rows to be the same height, place your cursor anywhere in the table and click this button. As with creating uniform columns, the standard size will be based on the cell with the most content.
	Click this button's drop-down triangle to see a palette of horizontal alignment options. There are nine options in all, from Top (vertical) Left (horizontal) to Bottom Right.

TABLE 8-1 Tables and Border Toolbar—Tools for Altering Table Size, Dimension, and Alignment

of the columns (or the height of the rows) that you want in the table, you can turn the text so that it reads straight up and down instead of side to side. Click the button to cycle through the options—vertical text facing left, vertical text facing right, and then back to horizontal text.

Sorting Table Content

For tables that house data—such as lists of names, products, classes, recipes, and books—you might have the need to put the items in order. Although this need might drive you to store your list in an application such as Excel or Access, if you don't do much more than read the list, there isn't any need to do so. Further, if you do keep your list in Excel or Access and you paste it into a Word document, it will appear as a table, and you'll have to deal with it in that form anyway. Here's an example of a typical list found in a Word document, currently not in any useful order.



First Name	Last Name	Department	Extension
Jean	Bowling	Marketing	245
Nan	Stickney	Sales	320
William	Fuller	Operations	410
Samantha	Frankenfield	Sales	350
Gary	Thomas	Marketing	262
Mark	Chambers	Operations	430
Shane	Weller	Sales	330
Nick	Fabiano	Marketing	275
Kaitlin	Patrick	Operations	440

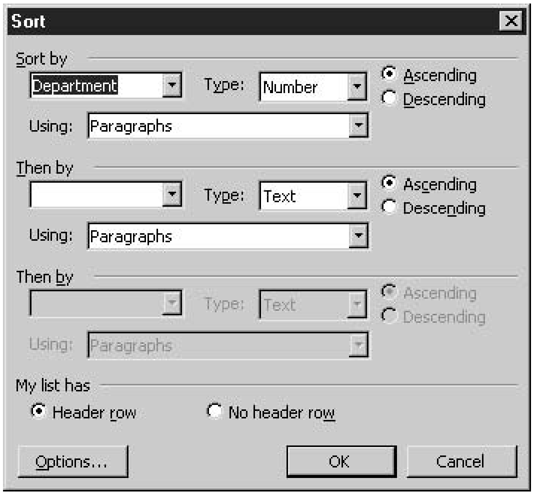
It's assumed that your list will contain a row (preferably the top row) that labels each column. In the table shown here, the top row identifies each column (First Name, Last Name, Department, and Extension). These column labels are seen as *fields* in the table so that the rows can be sorted as though they're data. Word will see this top row as a *header row*, and only the rows beneath it will be sorted.

To sort your table, simply click to place your cursor in any cell in the column you want to sort by. In our example table, to sort by Department, click in any cell in the Department column. Next, using the Tables and Borders toolbar, click either the Sort Ascending (A-to-Z) or Sort Descending (Z-to-A) button. You can also choose Table | Sort and use the resulting dialog box to choose which column to sort, potentially sorting by up to three columns, as shown in Figure 8-6.

TIP *When sorting by more than one column, start with the one that has the greatest number of duplicate entries in it, such as State in a name and address list, or Department in an employee list. The last column you sort by should be the one with the least duplicates, such as Last Name. The first sort puts the list in groups, and then the subsequent columns place those groups in an order that makes sense for you.*

Here are some troubleshooting tips for building and sorting a list inside a Word table:

- Don't leave any blank rows in your table. They'll be sorted along with the rows containing data and will appear before the data-bearing rows if you perform an ascending sort.
- Don't worry about individual cells that are left empty—they're not a problem, and it's not uncommon to have less data for one record than another.


Sort

Sort by
Department Type: Number ● Ascending ○ Descending
Using: Paragraphs

Then by
Type: Text ● Ascending ○ Descending
Using: Paragraphs

Then by
Type: Text ● Ascending ○ Descending
Using: Paragraphs

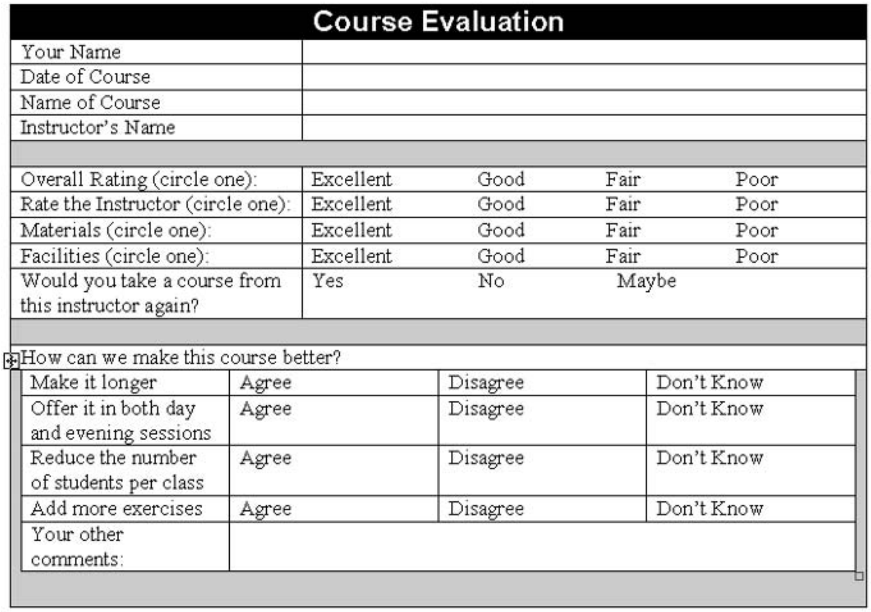
My list has
● Header row ○ No header row

FIGURE 8-6 The Sort dialog box gives you the ability to sort by one, two, or three columns in your table.

- Word will sort by the first letter or number in the cell. For example, if you're sorting by address, "123 Main Street" will come before "246 Apple Lane," even though Apple comes before Main when listed alphabetically. The sort will be done on the numbers because they come first.
- Break your data into as many columns as you can to give yourself more sorting possibilities. In a name and address list, for example, don't just have a Name field with each person's full name. Rather, have two fields, First Name and Last Name, and perhaps a field titled Middle Initial.

Nesting Tables

A nested table is simply a table inside another table. To create one, simply click inside any cell in an existing table and use the same techniques you used for building the first table. Choose Insert | Table or click the Insert Table button and choose the dimensions (number of columns and rows) for the nested table. The new table will live inside another table's cell, but you can format it separately, sort data within it, even perform calculations on numbers inside the nested table, all without any effect on the surrounding table or its content. Figure 8-7 shows a nested table that provides a way to potentially break down the data in the main table.



Course Evaluation				
Your Name				
Date of Course				
Name of Course				
Instructor's Name				
Overall Rating (circle one):	Excellent	Good	Fair	Poor
Rate the Instructor (circle one):	Excellent	Good	Fair	Poor
Materials (circle one):	Excellent	Good	Fair	Poor
Facilities (circle one):	Excellent	Good	Fair	Poor
Would you take a course from this instructor again?	Yes	No	Maybe	
How can we make this course better?				

Make it longer	Agree	Disagree	Don't Know
Offer it in both day and evening sessions	Agree	Disagree	Don't Know
Reduce the number of students per class	Agree	Disagree	Don't Know
Add more exercises	Agree	Disagree	Don't Know
Your other comments:			

FIGURE 8-7 By nesting a table, you're able to deal with its contents separately from the main table's data.

How to ...

Sum a Row or Column of Numbers in a Table

Word also allows you to "do the math" when it comes to numeric content in your tables. You can perform any sort of calculation you need, but the simplest (and most commonly performed) is an AutoSum. An AutoSum quickly sums (adds) a column or row of numbers. To perform an AutoSum, click in the cell that should contain your total, the result of the AutoSum. Then, click the AutoSum button (the last button on the bottom row of buttons in the Tables and Borders toolbar). The total of the adjoining cells (the numbers in the cells above if you're totaling a column, or the numbers to the left if you're totaling a row) appears in the cell. If you later change any of the numbers in the cells that are included in the total, simply click once on the total and press F9 to update it. You can also reclick the AutoSum button on the Tables and Borders toolbar to achieve the same goal.

Or another quick method is to paste a section of an Excel worksheet into your Word document. This creates a table and builds in Excel's formula functionality all in one fell swoop. Just select the block of cells in Excel, press CTRL-C (Copy), switch to Word, and then press CTRL-V (Paste). Voilà!

Chapter 9

Creating Form Letters, Envelopes, and Labels with Mail Merge

Conversation
Hello!
A
B
C
D
E
1
2
3
4
5
URL:

How to…

- Merge data with documents
- Create a form letter for mass mailings
- Print labels and envelopes from a database of addresses
- Sort and query a database to refine a mail merge

The term *mail merge* really says a lot about itself. When you perform a mail merge with Word, you're merging (combining) data and a document for the purpose of a mailing. The document can be a letter, a label, or an envelope, or you can use the same database to create all three items—imagine a sales letter going to potential customers, where you insert the recipients' name, address, and perhaps even the name of the product you expect them to purchase. After merging the form letter with your database of potential customers, you need to mail those letters, so you merge again to create envelopes for the letters, re-grabbing the name and address information from the database. If you prefer to place labels on envelopes, that's doable, too—instead of merging the database with envelopes, you can merge it with a table of labels, printing one label for each record in the database. Word's mail merge tools allow you to customize your merge so that you only get the records you want, and so that the records you do get are in the order you need them. It's a powerful set of tools, and in this chapter, you'll learn to harness them.

Starting the Mail Merge Process

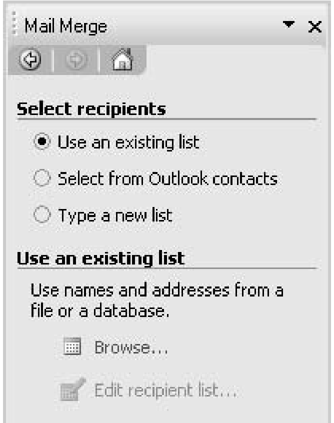
Of course, before you invoke Word's mail merge tools, you need a plan, or an idea of what you want to do. You should know what data you want to use for your merge, what kind of document you want to merge with that data, and how you'll use the merged documents. If you're going to create a form letter, you should know what the letter will say, or already have the body of the letter typed. You'll be adding content to any existing letter later, inserting places for data to be added to the letter's text—names, addresses, and so on.

Once you have those basics covered, you can start the mail merge process. Choose Tools | Letters and Mailings | Mail Merge. The Mail Merge task pane appears. Through this task pane you can perform the mail merge, step by step, telling Word what you want to do and how you intend to do it. In the first pane that appears, you select the type of document you are working on: Letters, E-mail messages, Envelopes, Labels, or Directory.

Creating a Form Letter

For our example, we're going to create a form letter, so choose Letters in the first pane of the Mail Merge panel. After you've made your selection, click the Next: Starting Document link at the bottom of the task pane—this moves you to the next step in the process, which is selecting the starting document. Choose the Use the Current Document option to begin building the form letter on the new, blank document that's already open, or choose Start from a Template if you have one ready.

If you already typed your form letter earlier and just need to convert it to a form letter with places in it for the data to go, choose Start from an Existing Document. (In these latter two scenarios, you'll be presented with a dialog box from which you can select that document/template.) When you click Next: Select Recipients at the bottom of the task pane, you'll move to the next step in the process.



Select recipients

● Use an existing list

○ Select from Outlook contacts

○ Type a new list

Use an existing list

Use names and addresses from a file or a database.

At this point, you have to tell Word where your database is—is it an existing list (stored in Excel or Access in tabular form), or do you want to use your Outlook contacts database? In the absence of either of those options, you can choose to create a new list for this particular mailing, but that will require a lot of data entry on your part—at least one record for every letter you need. Assuming you have a list ready to go, choose Use an Existing List (this is the default).

Now you need to tell Word where the list is. Click the Browse link and the Select Data Source dialog box opens, through which you can navigate to the drive and folder that contains your database. The dialog box is set to search for all known database formats—including Access tables, Excel workbooks, and Word documents (that can contain tables of data). As soon as you make your choice of database files, click Open. The next thing you see will vary, depending on the data source you chose—if you're using an Excel workbook, you'll be shown a list of the sheets in that workbook, and you need to pick the one that has the database in it. If you chose an Access database, you'll have to pick which table to use.

Once you've specified the worksheet or table that contains your data, that list, in tabular form, is presented. You can choose which records will be merged with your letter (all of them are selected by default), and you can sort the records by clicking the field names at the top of the columns (see Figure 9-1).

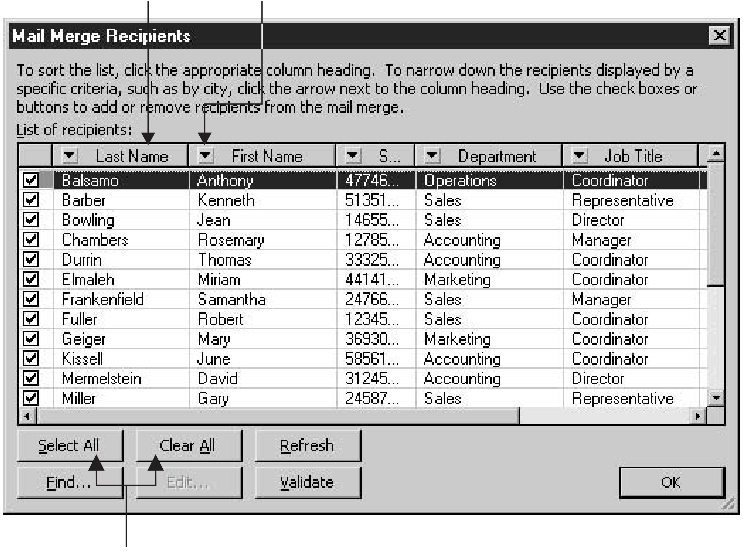
TIP *If you click the drop list on a particular field, you can choose Advanced to filter for particular records, using tools similar to the filtering tools in Excel and Access.*

Now you're ready to build your form letter—to type it from scratch if you chose to use the current document back in the second step of the mail merge process, or to add *merge fields* to an existing letter. If you're typing from scratch, you can leave spots for the merge fields (instructions for Word to tell it where to insert the data) and just type the letter itself. Click the Next: Write Your Letter link at the bottom of the task pane, and after you've written the body of your letter, use the links—Address Book, Greeting Line, Electronic Postage, Postal Bar Code, or More Items—to access the list of field names from your chosen database, each of which becomes a potential merge field to be added to the letter.

TIP *Don't forget to type punctuation and spaces as needed before and after merge fields (for example, using a space between the First Name and Last Name fields) so that the letter's text flows normally.*

Click the field name button to sort by that field in ascending order.

Click the drop list to choose to see specific records.



To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

	Last Name	First Name	S...	Department	Job Title
☑	Balsamo	Anthony	47746...	Operations	Coordinator
☑	Barber	Kenneth	51351...	Sales	Representative
☑	Bowling	Jean	14655...	Sales	Director
☑	Chambers	Rosemary	12785...	Accounting	Manager
☑	Durrin	Thomas	33325...	Accounting	Coordinator
☑	Elmaleh	Miriam	44141...	Marketing	Coordinator
☑	Frankenfield	Samantha	24766...	Sales	Manager
☑	Fuller	Robert	12345...	Sales	Coordinator
☑	Geiger	Mary	36930...	Marketing	Coordinator
☑	Kissell	June	58561...	Accounting	Coordinator
☑	Mermelstein	David	31245...	Accounting	Director
☑	Miller	Gary	24587...	Sales	Representative

Use these buttons to select all or none of the records.

FIGURE 9-1 Got the right data? If so, and if you want to use all the records, click OK to proceed.

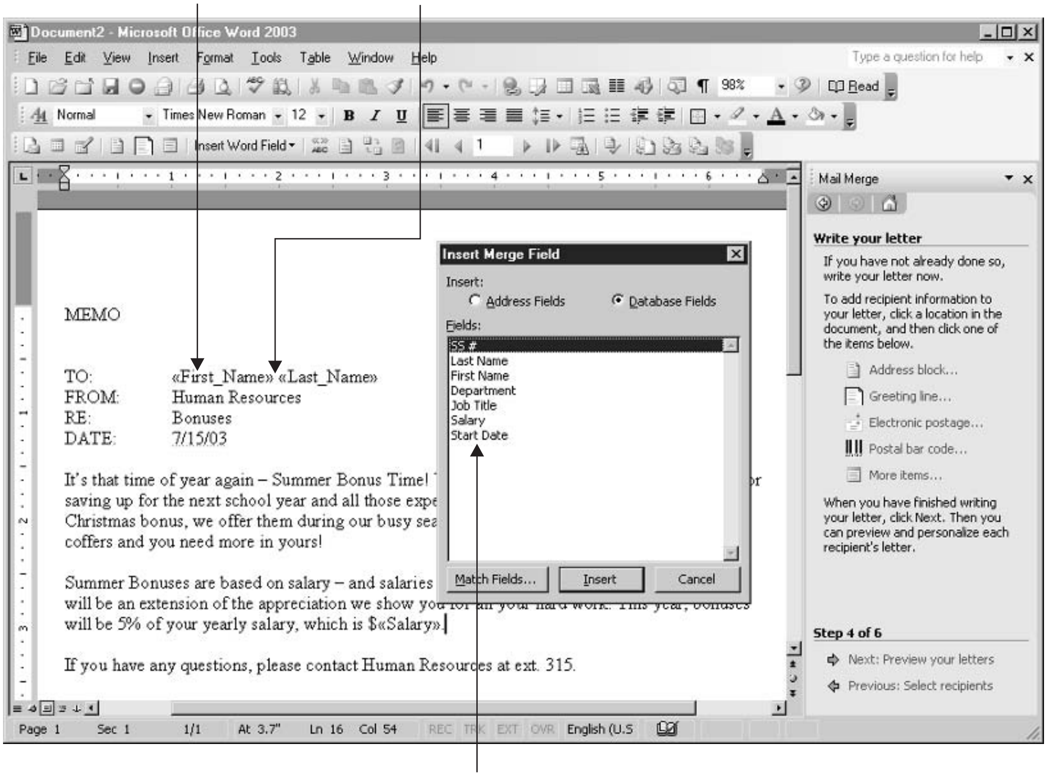
With the body of your letter typed, position your cursor at any spot where you want Word to insert data—it can be after the word "Dear" in the salutation, or below the date, where you may want to insert the recipient's name and address. Depending on your database and the purpose of the letter, you may have other data that can be inserted, as shown in Figure 9-2.

When you're finished inserting merge fields, click the Close button in the Insert Merge Fields dialog box. In the task pane, click the Next: Preview Your Letters link to preview the selected records from your database merged with the letter you just created. As shown in Figure 9-3, you can scroll through the letters (there will be one for every record you selected), and you get another chance to eliminate people from your mailing—click the Exclude This Recipient button to get rid of a particular merged letter.

When you like what you see, click Next: Complete the Merge. This performs the actual merge, and you can choose to have the letters go directly to the printer (click the Print link) or you can create a new document that's made up of all the letters you created by merging your database with the form letter (click the Edit Individual Letters link). If you choose the latter option, you can edit particular letters, customizing one or more for specific recipients, make changes to all the letters (using Find and Replace, for example, to replace something in the body of the form letter), or just to give yourself another chance to proof the letters before potentially wasting several sheets of letterhead if it turns out you missed a typo.

The merge field appears where your cursor was when you chose a field.

Notice the space between names is included here.



Document2 - Microsoft Office Word 2003
File
Edit
View
Insert
Format
Tools
Table
Window
Help
Type a question for help
98%
Read
Normal
Times New Roman
12
Insert Word Field
1
Mail Merge
Address block…
Greeting line…
Electronic postage…
Postal bar code…
More items…
Next: Preview your letters
Previous: Select recipients
Page 1
Sec 1
1/1
At 3.7"
Ln 16
Col 54
REC
TRK
EXT
OVR
English (U.S
Match Fields…
Insert
Cancel

MEMO

TO: «First_Name» «Last_Name»
FROM: Human Resources
RE: Bonuses
DATE: 7/15/03

It's that time of year again – Summer Bonus Time!
saving up for the next school year and all those expe
Christmas bonus, we offer them during our busy sea
coffers and you need more in yours!

Summer Bonuses are based on salary – and salaries
will be an extension of the appreciation we show you
will be 5% of your yearly salary, which is $«Salary».

If you have any questions, please contact Human Resources at ext. 315.

Insert Merge Field

Insert: ○ Address Fields ● Database Fields

Fields:
SS #
Last Name
First Name
Department
Job Title
Salary
Start Date

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

When you have finished writing your letter, click Next. Then you can preview and personalize each recipient's letter.

Step 4 of 6

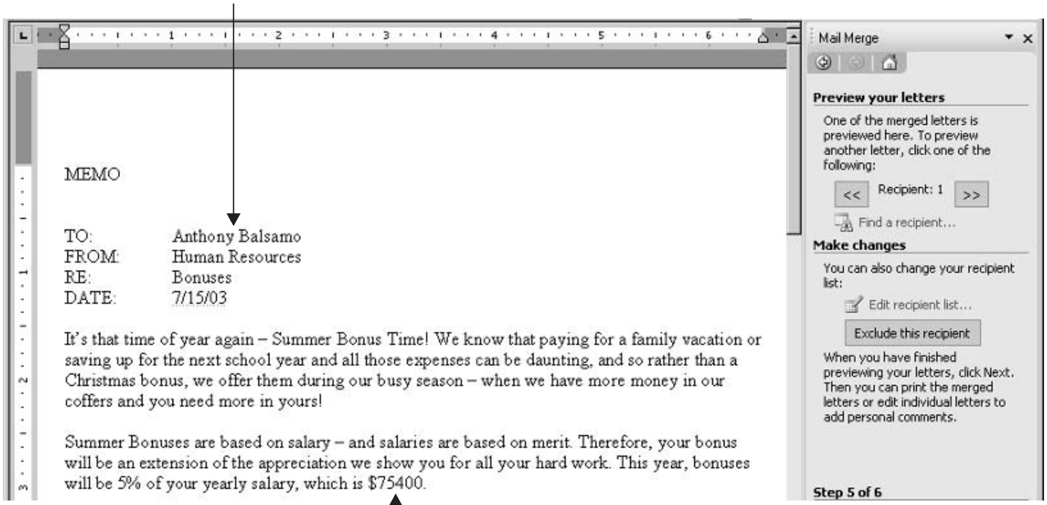
Pick a field from this box and click the Insert button.

FIGURE 9-2 Your database fields are now insertable merge fields that show Word where to insert data into your letter.

Creating Mailing Labels

Now that you've created your letter, you may want to mail or otherwise deliver it. The internal memo created in the previous section of this chapter would be delivered to employees, probably in individual envelopes, for security—after all, salary information is included in the memo. Such delivery—whether executed internally or via postal mail—requires either envelopes with names and addresses printed on them, or labels to be applied to blank envelopes. In this section, we'll create labels—a process very similar to merging names and addresses with envelopes, but more effectively shown within the context of this book's illustrations.

The First Name and Last Name fields brought the employee name in here.



MEMO

TO: Anthony Balsamo
FROM: Human Resources
RE: Bonuses
DATE: 7/15/03

It's that time of year again – Summer Bonus Time! We know that paying for a family vacation or saving up for the next school year and all those expenses can be daunting, and so rather than a Christmas bonus, we offer them during our busy season – when we have more money in our coffers and you need more in yours!

Summer Bonuses are based on salary – and salaries are based on merit. Therefore, your bonus will be an extension of the appreciation we show you for all your hard work. This year, bonuses will be 5% of your yearly salary, which is $75400.

Mail Merge

Preview your letters

One of the merged letters is previewed here. To preview another letter, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Exclude this recipient

When you have finished previewing your letters, click Next. Then you can print the merged letters or edit individual letters to add personal comments.

Step 5 of 6

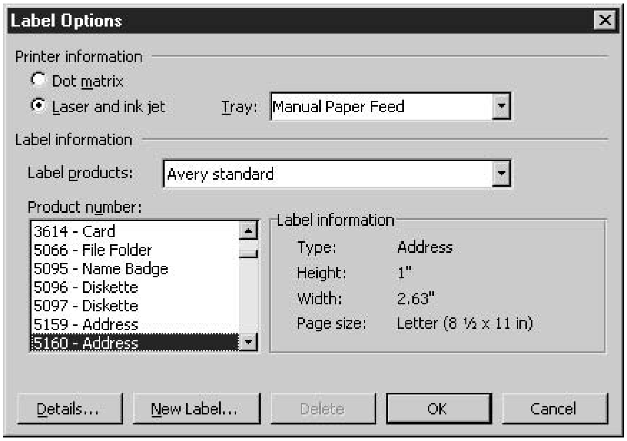
A reference to the employee's salary is included here.

FIGURE 9-3 Preview your letters, one for each record you chose to include from the selected database.

Choosing the Right Label

The merged label-creation process starts by choosing Tools | Letters and Mailings | Mail Merge. In the first Mail Merge task pane, select Labels from the Select Document Type list, and then click the Next: Starting Document link at the bottom of the pane. This makes a new pane available, including a Label Options link—click this to choose the labels you'll be printing on. You want to make this selection now so that the labels you go on to build are set up for the dimensions of the specific labels you're intending to use. The Label Options dialog box, shown in Figure 9-4, gives you a choice of printers (dot matrix or laser/inkjet), a choice of label manufacturers (Avery is the default), and a list of the selected manufacturers' label product numbers. For the purposes of this demonstration, I'll be using Avery's 5160 label, a 1"×2.63" label.

TIP *If the label you have isn't on any manufacturer's list, create a new label by clicking the New Label button in the Label Options dialog box. You can enter the dimensions of the labels, how many there are per sheet, and the margins around and between the labels. You can name the custom label for future use, and you will be able to find it later in the manufacturer list by choosing Custom.*



Label Options

Printer information

○ Dot matrix

● Laser and ink jet

Tray: Manual Paper Feed

Label information

Label products: Avery standard

Product number:

3614 - Card
5066 - File Folder
5095 - Name Badge
5096 - Diskette
5097 - Diskette
5159 - Address
5160 - Address

Label information

Type: Address

Height: 1"

Width: 2.63"

Page size: Letter (8 ½ x 11 in)

FIGURE 9-4 Select your label manufacturer and product number, and click OK to set up a sheet of blank labels awaiting your merge instructions.

Selecting Your Data Source

Your sheet of blank labels can now be fleshed out by clicking the Next: Select Recipients link at the bottom of the task pane. As with form letters, you can use an existing list (an Excel worksheet, Access table, or other database) or create a new list from scratch (Type a New List), or you can use your Outlook contacts as the source of your recipients' list. For this demonstration, as we've already seen the process of using an Excel worksheet as our data source, we'll use my Outlook address book, clicking the Select from Outlook Contacts option in the Select Recipients section of the task pane (see Figure 9-5).

Click the Choose Contacts Folder link (which appears after you've designated Outlook as your data source) and choose a profile name in the resulting Choose Profile dialog box. The profile is the name by which Outlook stores your contacts and other information—you can have multiple profiles, and therefore multiple sets of contacts.

After you choose a profile and click OK, the Select Contact List dialog box opens, showing you the contact lists associated with that profile. Choose the one you want to use and click OK—the Mail Merge Recipients dialog box appears next, showing you all the people and organizations in your Outlook contacts list. All the recipients are selected, which you can accept, or you can go through the list and uncheck those for which you don't want to print a label (as shown in Figure 9-6).

Merging Data with Your Labels

Assuming you want all the recipients in the list to get a label, click OK to accept them. Then click Next: Arrange Your Labels from the bottom of the task pane. As we did with the form letter, it's now time to insert the merge fields that tell Word which pieces of information from the selected data source (your Outlook contacts, in this case) to include in the label, and in which order they should appear. Because we're printing an address label, you can click the Address Block link,

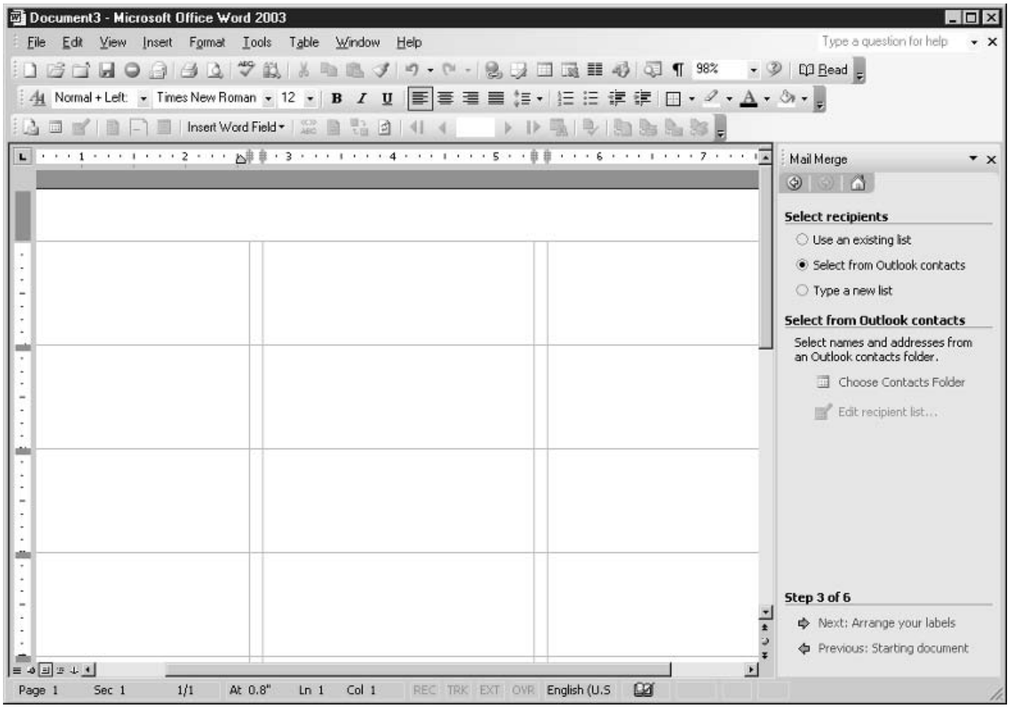
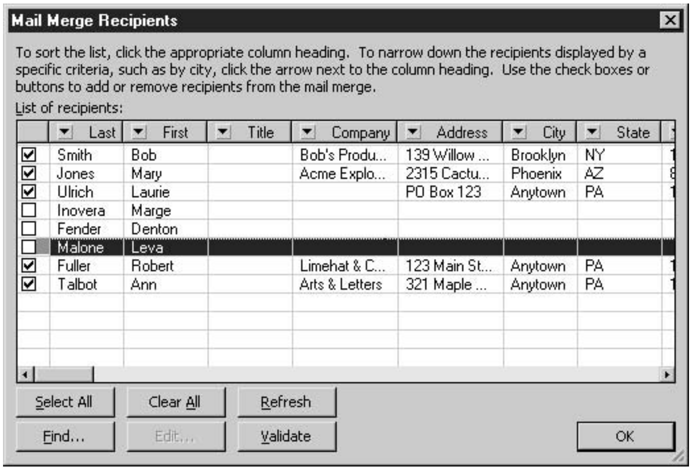

Document3 - Microsoft Office Word 2003
File Edit View Insert Format Tools Table Window Help
Type a question for help
98%
Read
Normal + Left
Times New Roman
12
Insert Word Field
Mail Merge
Select recipients
○ Use an existing list
● Select from Outlook contacts
○ Type a new list
Select from Outlook contacts
Select names and addresses from an Outlook contacts folder.
Choose Contacts Folder
Edit recipient list...
Step 3 of 6
Next: Arrange your labels
Previous: Starting document
Page 1 Sec 1 1/1 At 0.8" Ln 1 Col 1 REC TRK EXT OVR English (U.S

FIGURE 9-5 Your blank labels will cease to be blank after you've chosen a data source in the task pane and told Word which pieces of data to place on the labels.


Mail Merge Recipients

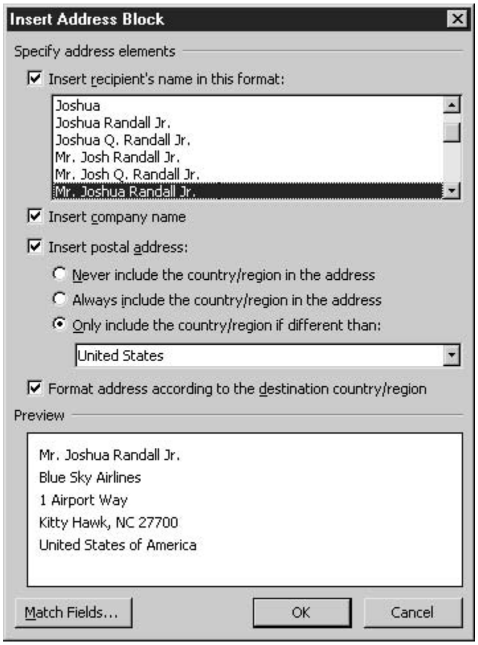
To sort the list, click the appropriate column heading. To narrow down the recipients displayed by a specific criteria, such as by city, click the arrow next to the column heading. Use the check boxes or buttons to add or remove recipients from the mail merge.

List of recipients:

	Last	First	Title	Company	Address	City	State
☑	Smith	Bob		Bob's Produ...	139 Willow ...	Brooklyn	NY
☑	Jones	Mary		Acme Explo...	2315 Cactu...	Phoenix	AZ
☑	Ulrich	Laurie			PO Box 123	Anytown	PA
☐	Inovera	Marge					
☐	Fender	Denton					
☐	Malone	Leva					
☑	Fuller	Robert		Limehat & C...	123 Main St...	Anytown	PA
☑	Talbot	Ann		Arts & Letters	321 Maple ...	Anytown	PA

Select All
Clear All
Refresh
Find...
Edit...
Validate
OK

FIGURE 9-6 Choose who will and won't get a label from your list of potential recipients.



Insert Address Block

Specify address elements

☑ Insert recipient's name in this format:

Joshua
Joshua Randall Jr.
Joshua Q. Randall Jr.
Mr. Josh Randall Jr.
Mr. Josh Q. Randall Jr.
Mr. Joshua Randall Jr.

☑ Insert company name

☑ Insert postal address:

○ Never include the country/region in the address
○ Always include the country/region in the address
● Only include the country/region if different than:

United States

☑ Format address according to the destination country/region

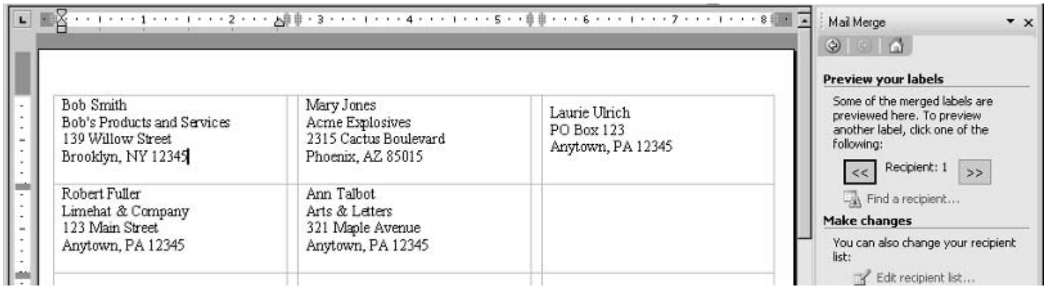
Preview

Mr. Joshua Randall Jr.
Blue Sky Airlines
1 Airport Way
Kitty Hawk, NC 27700
United States of America

FIGURE 9-7 Assuming you've built your contacts list to include full names and complete addresses, you can use the Address Block method of fleshing out your labels.

which shows you a default address setup, as shown in Figure 9-7. You can also click More Items to open the Insert Merge Field dialog box, from which you can select only the fields you want to use.

After inserting the <<Address Block>> code into the first label, click the Update All Labels button at the foot of the task pane—this places the <<Address Block>> code in each of your labels. Click the Next: Preview Your Labels link to see how your contact list records look:



Bob Smith Bob's Products and Services 139 Willow Street Brooklyn, NY 12345	Mary Jones Acme Explosives 2315 Cactus Boulevard Phoenix, AZ 85015	Laurie Ulrich PO Box 123 Anytown, PA 12345
Robert Fuller Limehat & Company 123 Main Street Anytown, PA 12345	Ann Talbot Arts & Letters 321 Maple Avenue Anytown, PA 12345	

Mail Merge

Preview your labels

Some of the merged labels are previewed here. To preview another label, click one of the following:

<< Recipient: 1 >>

Find a recipient...

Make changes

You can also change your recipient list:

Edit recipient list...

Then to perform the actual merge between your labels and your contact list click the Next: Complete the Merge link.

Printing Labels

When you click the Next: Complete the Merge link, the task pane changes to offer you two choices: Print and Edit Individual Labels. If you want to add text to any of the labels, format the labels (maybe choose a different font for the whole sheet of labels), or do anything else to the labels before printing, choose Edit Individual Labels. If they look fine as they are and you're ready to print them, click the Print link. This opens the Merge to Printer dialog box, where you can choose to print all records, the current record (whichever cell in the table of labels contains your cursor), or a range of records using the From and To boxes. Choosing All is your best option in most cases, so leave that selected and click OK. The Print dialog box opens, and you can then choose a printer and how many copies of the labels to print.

Mail Merge Troubleshooting

A lot of variables can contribute to a problematic mail merge. Most of them can be alleviated by doing some research and planning before you start the literal mail merge process:

- Make sure you know where your database is—which Excel workbook, Access database, or other source—and make a note of the drive and folder on which it's stored. This will save you scrambling to find it when you get to the point in the mail merge process where you have to tell Word where your list of recipients is.
- Check your database before you use it. If, for example, you intend to use an Outlook contacts list, make sure the vast majority of your records are not just names and email addresses or names and phone numbers. Many people build a contacts list through receiving emails and don't have actual mailing addresses for everyone on their list. If you need to use the contacts list and find that full addresses are not included for many of the records, now is the time to go get that information and flesh out the records so they can be used for labels or envelopes.
- Make sure you know what label you'll be printing on. Don't just guess—go check the supply cabinet now.
- If you're printing on envelopes, check your printer settings ahead of time so you know how to insert the envelopes and how the feeder on your printer works, if there is one.