Membership Course

MS Word 2000 Advanced

Course Objectives

Generally
The objective of this course is to develop your skills in Word to an advanced level. The course concentrates on the desktop publishing and report writing features of Word, and covers the mail merge feature in depth. By the end of this course, you will have confidence in your ability to create and manage longer documents, use advanced page layout features and graphics, and set up mail merge documents.

Specifically
On completion of this course, you will be able to:

- **Create** and **modify** a template
- **Attach** a new template to a document
- **Create**, **modify** and **apply** styles
- Use the **Organizer** and the **Style Gallery**
- **Sort** lists, paragraphs and tables
- Insert **bitmapped graphics** in documents
- Align text around graphics
- Create a **watermark**
- Create and modify **page borders**
- Use **text flow** options
- Work with a document in **Outline** view
- Use **Find** and **Replace**
- Create a **table of contents** and an **index**
- Insert **bookmarks** and **cross-references**
- Insert **footnotes** and **endnotes**
- Set up **mail merge** documents
- Edit the **data document** and use other **data sources**
- Print **mail merge** documents and **labels**

Year 2000 Best Practice

It is important that anyone creating or using a Word document understand the year 2000 problem - often referred to as the "Millennium Bug".

Essentially, the year 2000 problem means that if you enter a date using two digits to represent the year, an error could occur in any calculations involving that date. This is true even after the year 2000 has passed.

Year 2000 best practice means learning to always enter a date using four digits for the year, and to create documents that always store and display the date this way.

Word 2000 itself is a compliant application. That means if you enter unambiguous, 4-digit year format dates, no errors will occur. Word uses the **Windowing Technique** to interpret dates entered using a 2-digit year. A 2-digit year less than 30 is assumed to be in the 21st century (for example **31/12/25** is assumed to be **31/12/2025**). Conversely, a 2-digit year equal to or greater than 30 assumed to be in the 20th century (for example, **13/12/31** is assumed to be **13/12/1931**).

As mentioned above, you should train yourself to always **type in the date using four digits for the year**. However, to make it obvious how Word handles 2-digit years, you should set the **short date style** in **Windows Regional Settings** to a **YYYY** format.
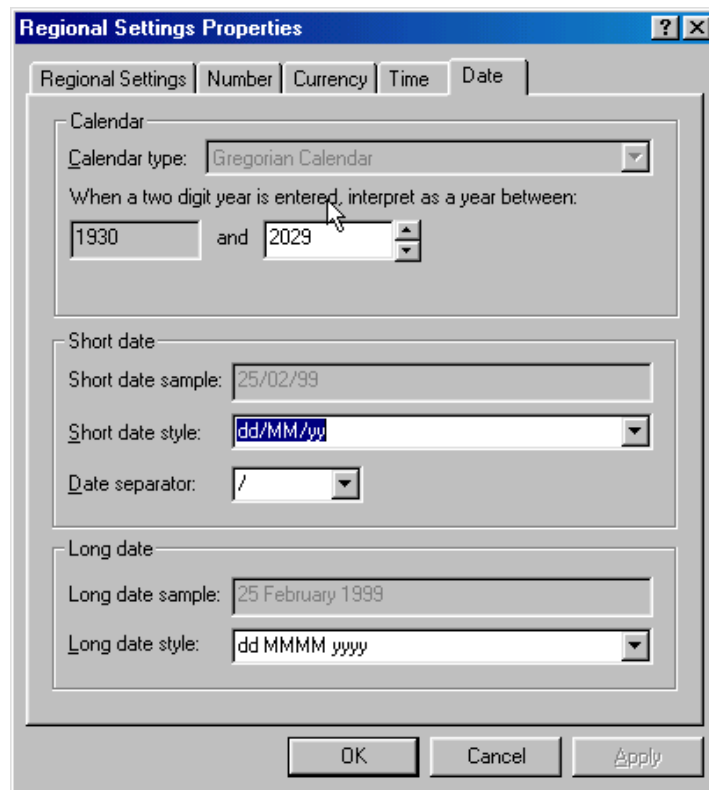
To set the short date format in Windows

- On the **Windows Taskbar**, click the **Start** button

- Select **Settings**, then **Control Panel**

- Double-click the **Regional Settings** icon

The **Regional Settings** dialogue box is displayed.

- Select the **Date** tab

Windows 98 Regional Settings dialogue box - Date tab

Note   This dialogue box looks slightly different in Windows 95.

- In the **Short date style** box, type **DD/MM/YYYY**

- Click **Apply**, then click **OK**

- Close the **Regional Settings Properties** dialogue box

To insert 4-digit year dates in documents

When you use a toolbar button to insert the date into a document, the default date style is used. You should make sure that this default is set to a 4-digit year date.
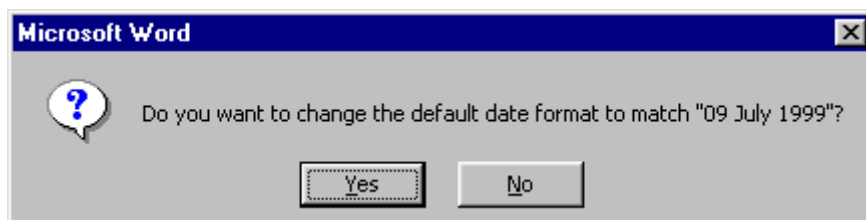
- From the **Insert** menu, select **Date and Time...**

The **Date and Time** dialogue box is displayed.
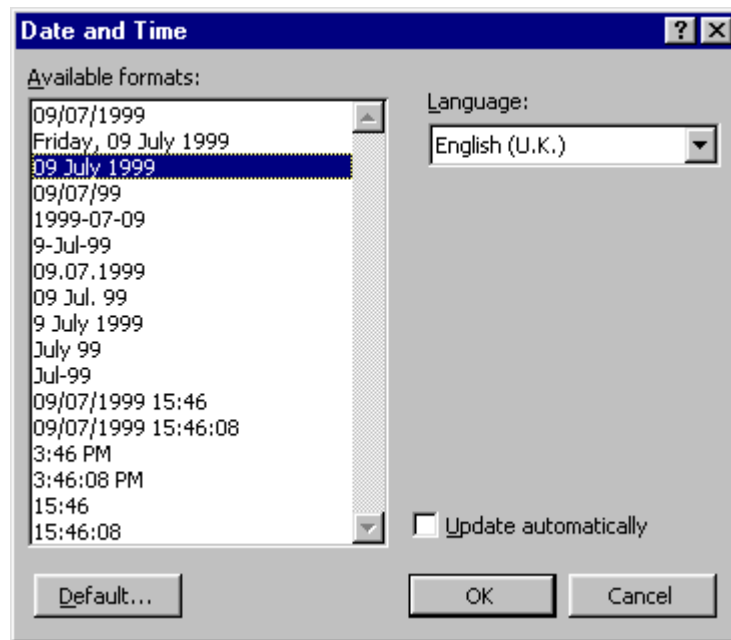
- From the **<u>A</u>vailable formats:** list box, select a format with a 4-digit year

- Click **<u>D</u>efault...**

A message box is displayed.

- Click **<u>Y</u>es**

Exercises

Reviewing the Basics

- Open the document **MILLENNIA CORPORATION**

- In **Print Layout** view, remove the manual page breaks and insert section breaks (next page) in their place

- Check the document for any spelling and grammatical errors

- Use the **Thesaurus** to find alternative words for "services" and "publishing"

- Use **Browse** to find "National Book Day"

- Apply existing **styles** to main headings

- Insert the following table in the area marked by an * on page **4**

Under 15	150000	300000	450000	500000	600000
16-20	250000	420000	560000	730000	900000
23-35	275000	320000	500000	700000	850000
36 and over	100000	250000	400000	520000	750000

- Insert an **AutoShape** on the first page

- Apply shading to all the **Overview** paragraphs

- Reformat the tables with borders and shading of your choice

- Format appropriate parts of the document into bullet lists

- Add a footer containing your name and the current date to the first page only

- Save the document with a new name and then close it

Note MS Office 2000 applications use "intelligent" menus, which are automatically personalised for you based on how often you use certain commands.

This means that the menus you see on screen may not look exactly like the ones shown in this manual. If you cannot see a command on a menu, click the **chevron** ⌄ arrows to display all available commands.

Templates

Objectives

|	
Generally	To use and create templates.
Specifically	On completion of this section, you will be able to:
•	Create documents based on the **Normal** template
•	Create documents based on the other templates
•	Create documents using a **Wizard** template
•	**Create** and **modify** a template
•	**Attach** a different template

All documents you create in Word are based on a **template**. A template determines the basic structure or layout for a document and can contain text, graphics, page formatting options, styles, AutoText entries, customised toolbars, menus, macros and shortcut keys.

Most documents you have been creating will probably have been based on the Normal template.

There are two basic types of templates: **Global** and **Document.** Global templates, which include the Normal template, contain settings that are available to all documents. Document templates, such as memo or fax templates, contain settings that are only available to the documents based on that document template.

Choosing to base your document on one template rather than another can dramatically change the way your document looks.

Note	Document templates have the file extension .dot.
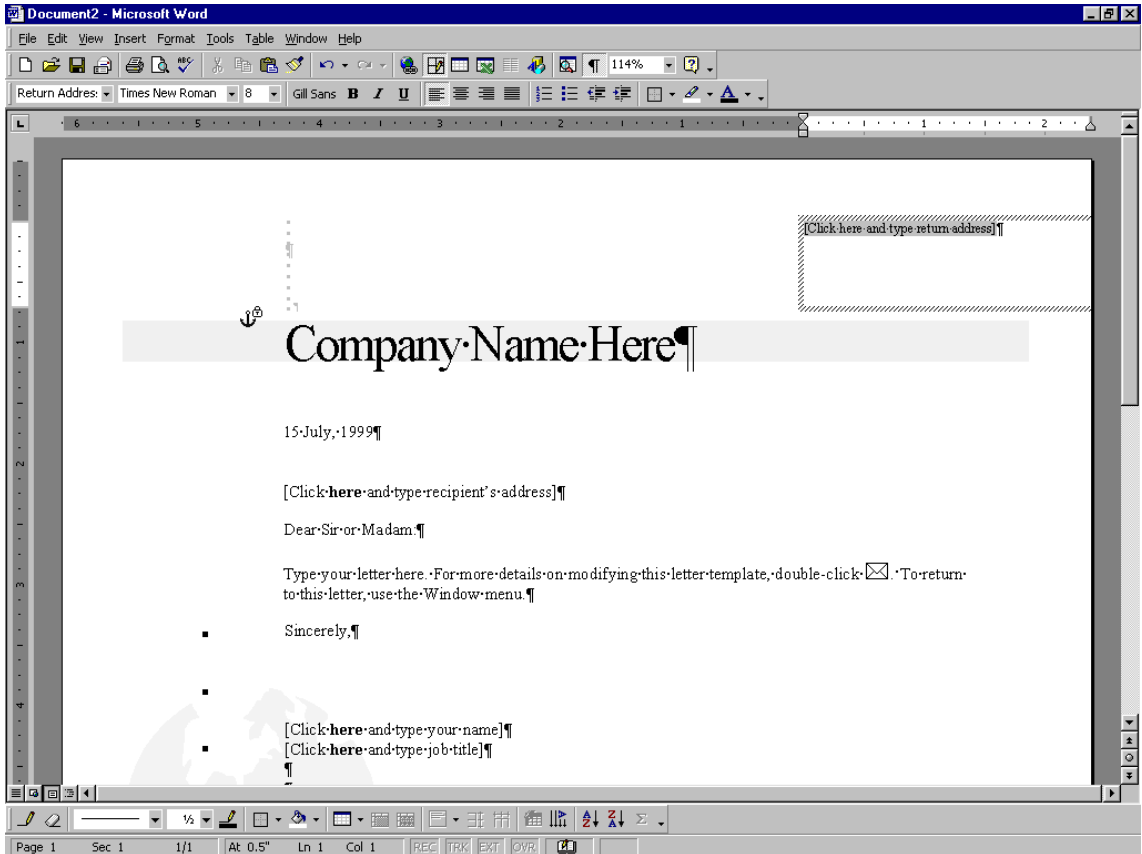
A new document based on the Contemporary Letter template
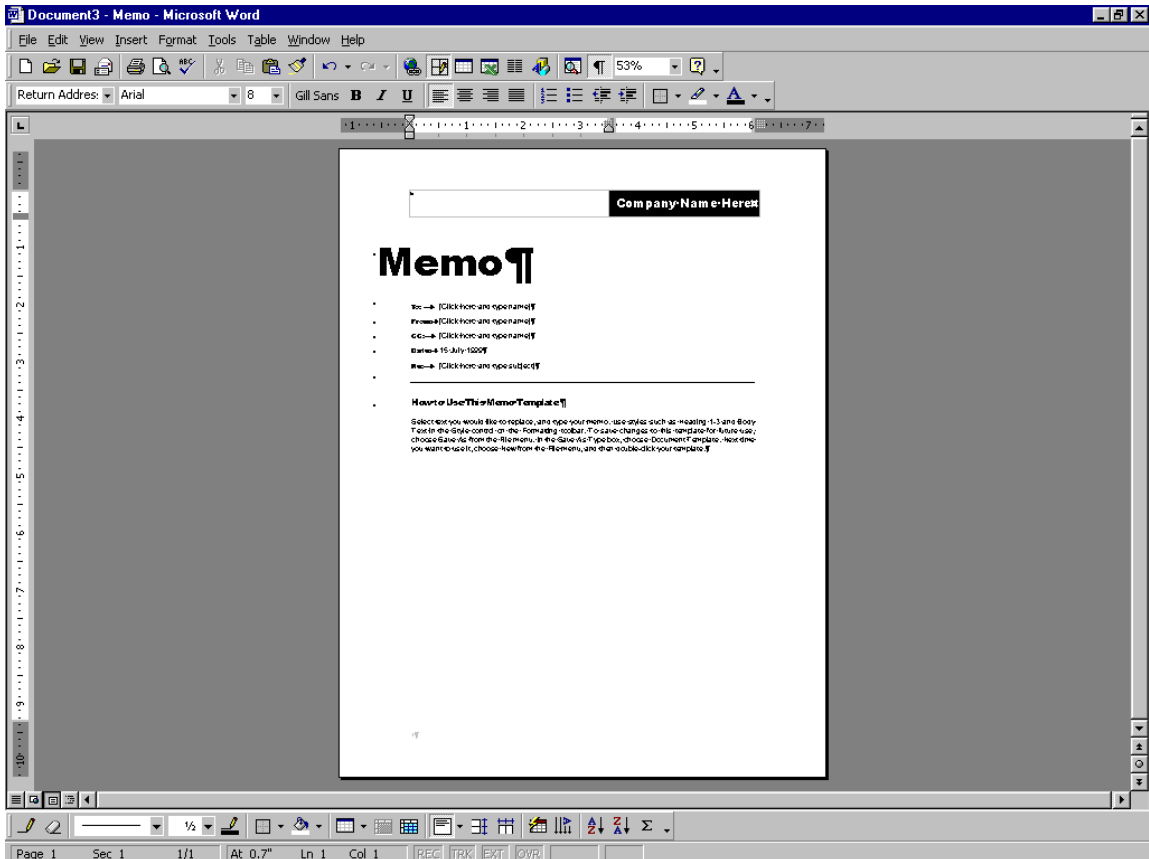
A new document based on the Professional Memo template

Creating Documents From Templates

When you start Word you are presented with a new document based on the **Normal** template. You will also base your document on this template if you click the **New** button ▭ on the **Standard** toolbar.

This template does not contain any text or graphics. It gives you a document with A4 portrait orientation, left, right, top and bottom margins of 1" (2.54cm). For most documents the Normal template is a good starting point.
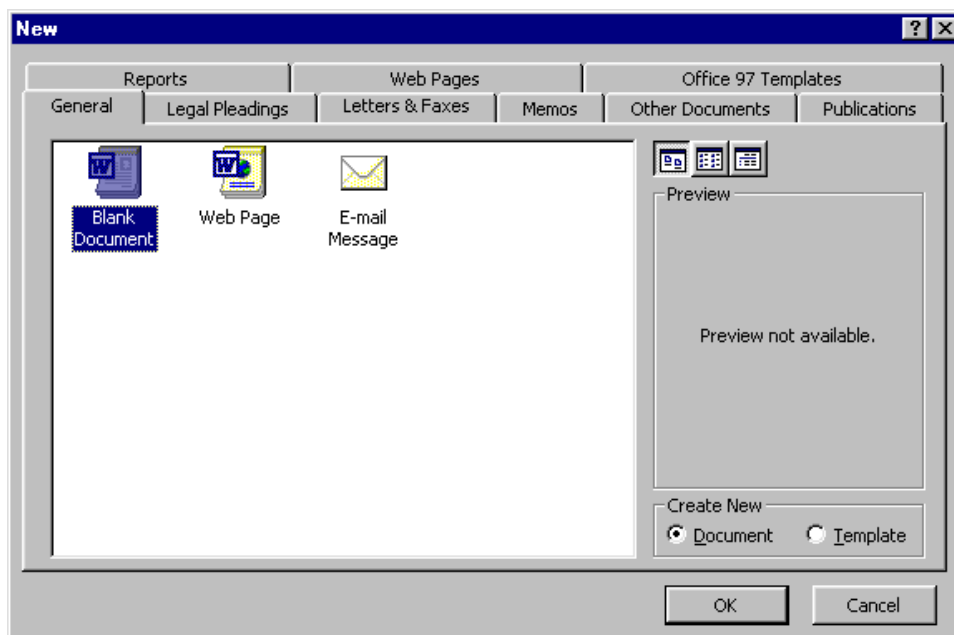
To create a new blank document based on the Normal template

- On the **Standard** toolbar, click **New** ▭

A new document is created.

OR

- From the **File** menu, select **New...** (*SpeedKey:* `Ctrl`+`N`)
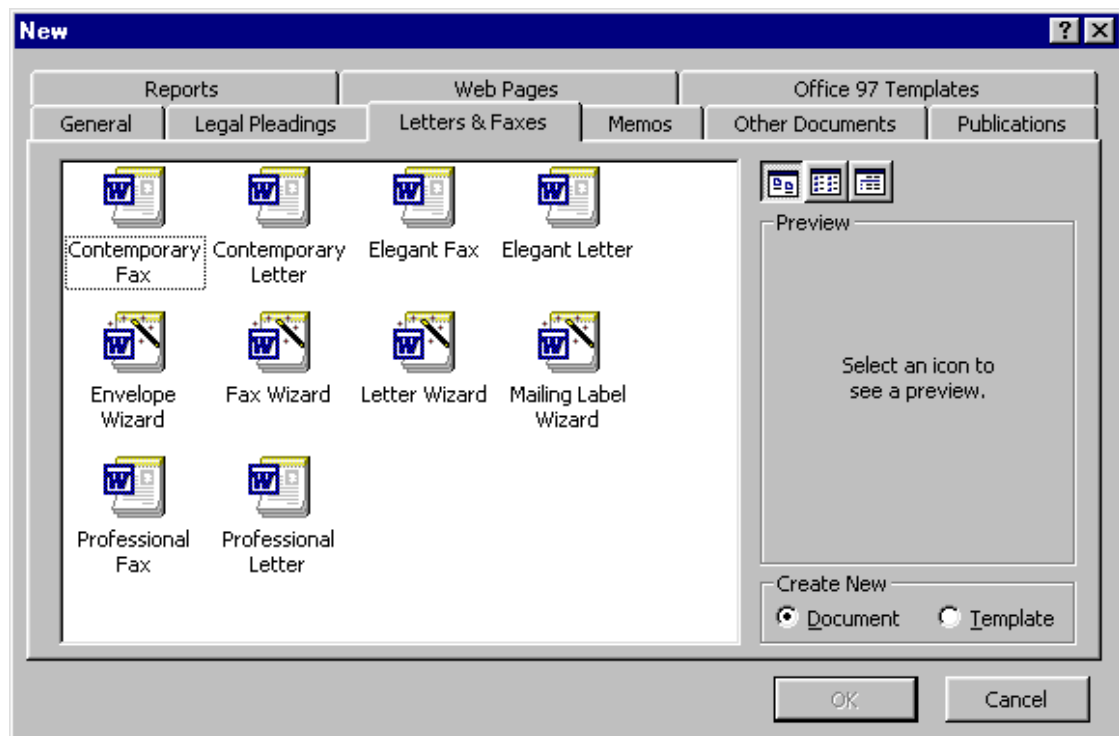
- Select the **General** tab

New dialogue box

- Select the **Blank Document** icon

- In the **Create New** panel, select the **Document** option button

- Click **OK**

To create a new document based on a letter document template

- From the **File** menu, select **New...**

- Select the **Letters & Faxes** tab

- Select a letter document template

The document template style is displayed in the **Preview** panel.

- From the **Create New** panel, select the **Document** option button

- Click **OK**

To use a Wizard to create a letter

If you use a **Wizard** to create a document you are presented with a series of dialogue boxes that allow you to specify how you want your document to look and some of the content of the document.
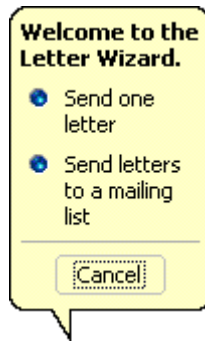
By answering questions in these dialogue boxes you can create a sophisticated document without working through Word's menus.

> **Note**   Wizards are given the file extension **.WIZ**.

- From the **File** menu, select **New...**

- Select the **Letters & Faxes** tab

- Click the **Letter Wizard**
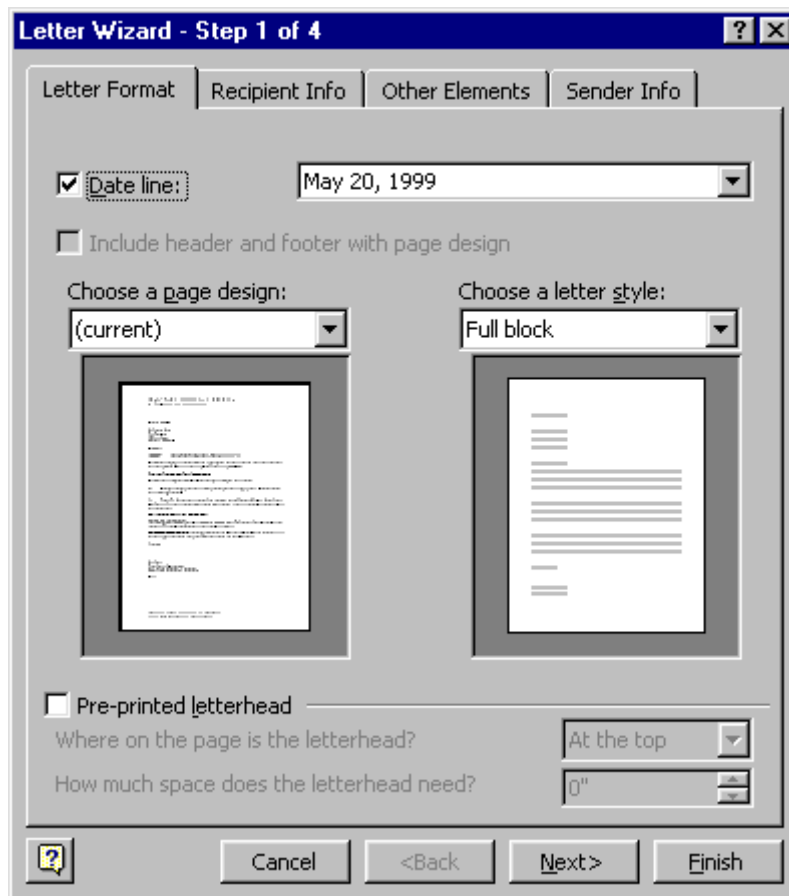
- Click **OK**

You are initially asked if you want to send one letter or to send many letters.

- Click **Send one letter**

The **Letter Wizard** - **Step 1 of 4** is displayed.

- Fill in the dialogue box as appropriate

- Click **Next>**

The **Letter Wizard** - **Step 2 of 4** is displayed.

- Fill in the dialogue box as appropriate

- Repeat until you have completed all four steps

- Click **Finish**

The letter you have created is displayed.

- Make any alterations to the letter and save the document in the normal way

Note	Depending on the style choices you make in the Wizard, Word will base your document on an appropriate document template.

Creating and Modifying a Template

The most straightforward way to create a template is to open a document that contains the text, graphics, formatting and styles that you want to reuse, and save it as a template.
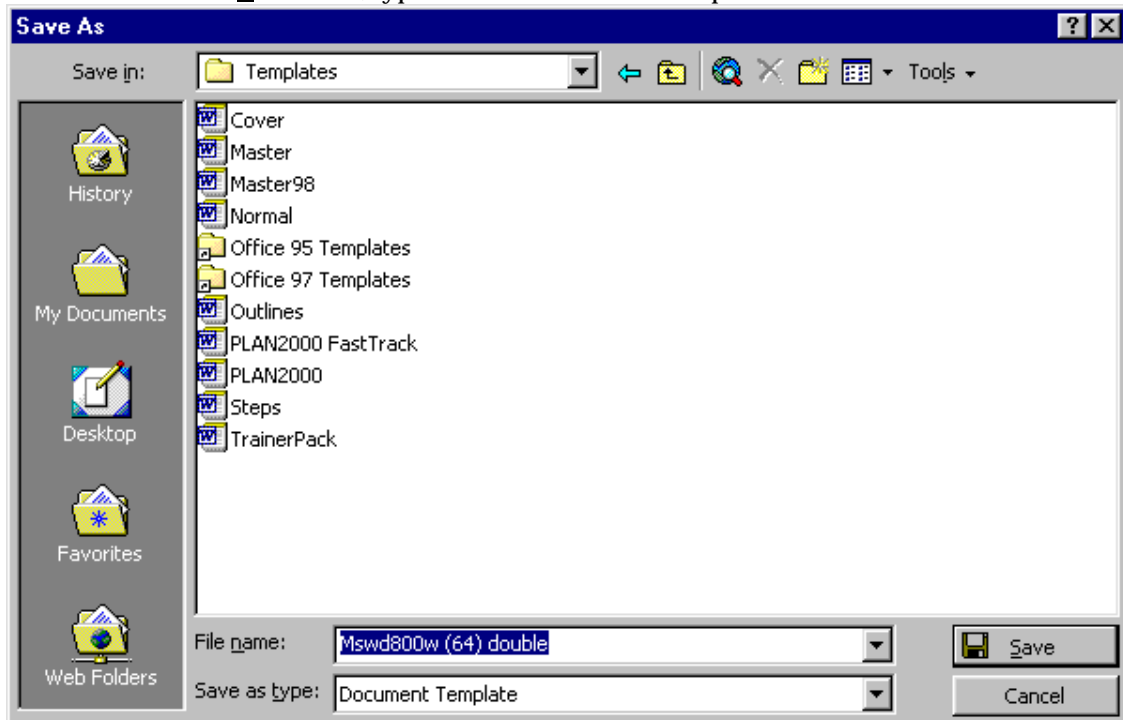
Note	If you want your document template to appear on the **General** tab of the **New** dialogue box you should save it in the **Templates** folder. If you want your template to appear on any other tab you should save it to the appropriate subfolder of the **Templates** folder, such as **Letters & Faxes**.

To base a new template on an existing document

- Open the document you want to save as a template

- Add the text and graphics you want to appear in all new documents that you base on the template, and delete any items you do not want to appear

- Make the changes you want to the margin settings, page size and orientation, styles, and other formats

- From the **File** menu, select **Save As...**

- In the **Save as type:** list box, select **Document Template**

The **Templates** folder appears in the **Save in:** box by default. To save the template so that it will appear on a tab other than **General**, switch to the corresponding subfolder within the **Templates** folder.

- In the **File name:** box, type a name for the new template

- Click **Save**

To modify an existing template

If you want you can open a document template in Word and make changes to it just as you would if you were working on a document. You must remember to save it again as a template (.DOT) rather than a document (.DOC).

- From the **File** menu, select **Open...**

The **Open** dialogue box is displayed.

- Select the template you want to modify

If no templates are listed in the **Open** dialogue box, click **Document Templates (*.dot)** in the **Files of type**: box.

- Click **Open**

The template is opened.

- Change any of the template's text and graphics, styles, formatting, macros, AutoText entries, toolbars, menu settings, and shortcut keys

- Save the template

Attaching a New Template

You can choose to attach a new template to an existing document. This makes a new set of styles, AutoText, macros and other customisations available. If the styles used in the document have the same name as in the newly attached template, you can choose to update them to the way they are formatted in the new template, or leave them as they are.

To attach a template

- Open the document to which you want to attach the template

- From the **Tools** menu, select **Templates and Add-Ins...**
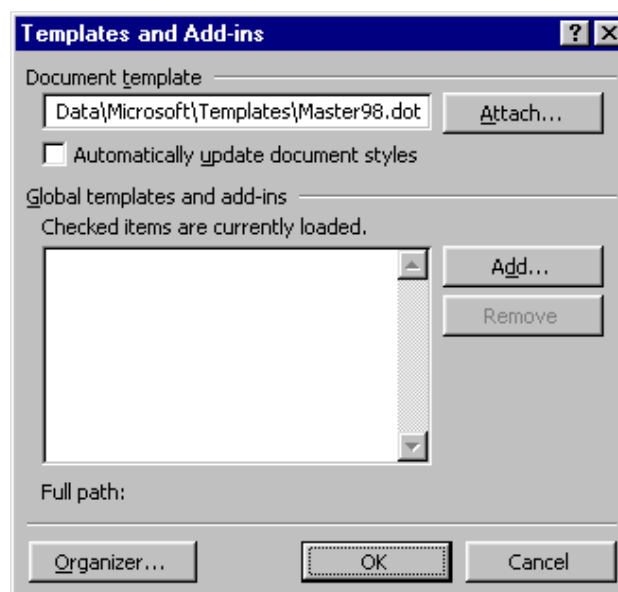
- Click **Attach...**

The **Attach Template** dialogue box is displayed.

- Select the template you want to attach

- Click the **Open** button

- In the **Templates and Add-ins** dialogue box, click **Automatically update document styles** to override the formatting of document styles with those in the template

> Note   This only affects styles in the document with the same name as styles in the new template. Any styles with different names are kept in the document.

- Click **OK**

Loading Global Templates

Usually when you work on a document you can only use the settings stored in the template you based the document on and settings in the Normal template.

If you decide that you want to use items (such as macros and AutoText) stored in a different template you can load the template as a **global** template. For example, you might have macros and AutoText applicable to several office documents based on different templates (memo, letter, report and so on). Rather than copy the macros to each different template, you could create a global template to work alongside the document templates.

Once you have loaded that template, items stored in it are available for use in the current document and in any other documents you create during the remainder of the time you are working in Word.

To load a template as a Global template

If you load a document template as a **Global** template, items such as macros stored in that template are available to any document opened in the remainder of the Word session, regardless of which document template it is based on.

- From the **Tools** menu, select **Template and Add-Ins...**

The **Templates and Add-ins** dialogue box is displayed.

- Click **Add...**

- Select the template you want to load as a **Global** template

- Click the **Open** button

- Click **OK**

> **Tip** If performance is an issue with your PC, unload global templates when you have finished using them (by clicking the check box to remove the tick). This releases system resources and speeds up your computer.

> **Note** You can use the **Templates and Add-ins** dialogue box to install Word tools (called Add-ins) developed by other programmers.

Workgroup Templates

Templates are a good way of ensuring that staff create similar looking letters, faxes, memos, reports and so on. Unfortunately, the default **Templates** folder is stored deep within a PC's Windows system folder (either in **Windows\Application Data\Microsoft\Templates** or in **Windows\Profiles***User Name***\Application Data\Microsoft\Templates** depending on whether there are there are several **users** on the same PC - that is, if you log on to your PC with a user name and password).

This is not very convenient if you want several users to share the same templates. Even if they share the same PC, they might not see the same templates in the **New** dialogue box.

If you have templates you want to share, you can create a **Workgroup Templates** folder, either on a PC or in a shared network folder. Then every user that can see the Workgroup Templates folder, can use the templates inside it.
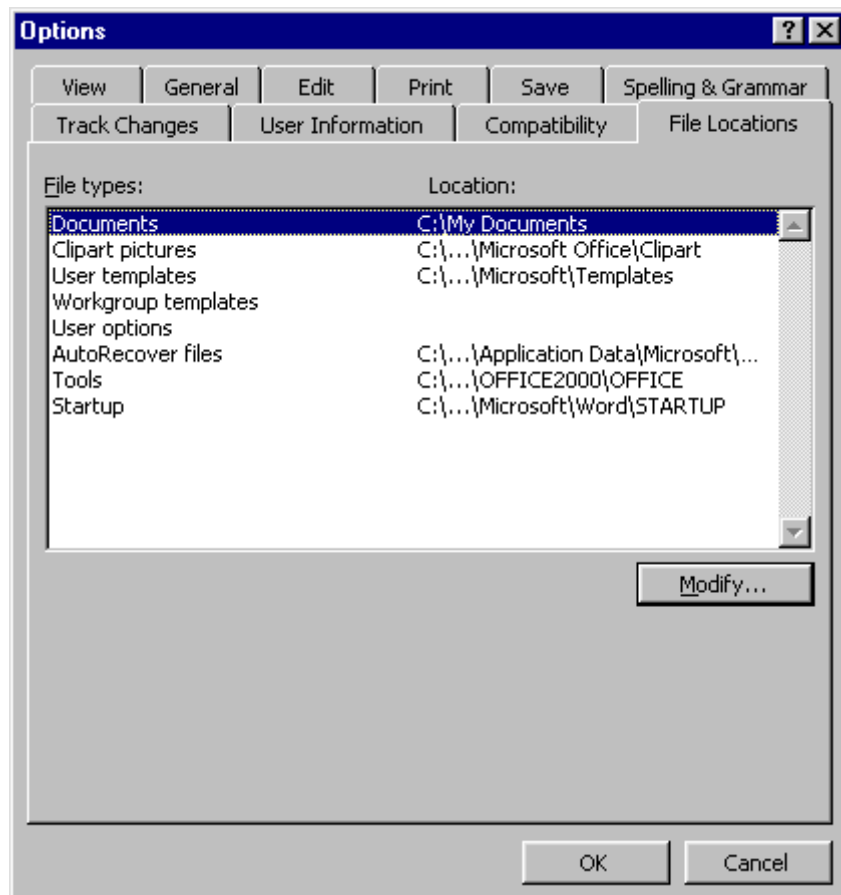
To set up a workgroup template

- Create a **Workgroup Templates** folder either on your PC or in a shared network folder

> **Note**   Ask your system administrator to create a shared network folder.

- Save the template you want to use as a workgroup template into the **Workgroup Templates** folder

- In Word, from the **Tools** menu, select **Options...**

The **Options** dialogue box is displayed.

- Click the **File Locations** tab

Options dialogue box

The **<u>F</u>ile types:** are listed with their locations defined on alongside.

- Select **Workgroup templates**

- Click **Modify...**

The **Modify Location** dialogue box is displayed.

- In the **Look <u>i</u>n:** box, select the **Workgroup Templates** folder

- Click **OK**

- Click **OK** to close the **Options** dialogue box

Any templates stored in this folder will now appear under the **General** tab of the **New** dialogue box. If you create subfolders in the network folder, they will appear as tabs in the **New** dialogue box.

Exercises

Working with Templates

- Create a new template containing the following text, tabs and border

<div style="border:1px solid black; padding:1em">

<p align="center">Memo¶</p>

¶
¶
To: →   → ¶
¶
From: →   → ¶
¶
Date: →   →¶
¶
Subject: →¶
¶
¶
¶
¶

</div>

- Save the template as **MYMEMO.DOT** in the **General** category

- Create a new document using the **Letter Wizard**

- Modify the formatting and layout of the letter to suit your own tastes

- Save the modified letter as a workgroup template with the name
  YOURNAME LETTER.DOT

> **Note**   Ask your trainer which folder to save the template in.

- Create a letter using another trainee's letter template

Styles

Objectives

Generally	To format documents consistently using styles.
Specifically	On completion of this section, you will be able to:
•	**Apply** styles
•	**Modify** styles
•	**Create** styles
•	Assign styles to shortcut keys
•	Apply styles **automatically**
•	Manage styles using the **Organizer**
•	Switch styles using the **Style Gallery**

The purpose of using style is to ensure a consistent appearance to your documents. The type of styles you use depends on the type of document. For a report you need heading, body text, list and footnote styles. For a letter you need sender's address, recipient's address, subject line and body text styles.

A style is a collection of formats you can apply to text. Each style can include attributes such as font, type size and style, spacing, indents and borders. Word provides a large number of ready-to-use styles, but you can also create your own styles. You can store styles in templates for use in several documents.

After you assign styles, you may decide you want to change all occurrences of text formatted with a style. Instead of reformatting each bit of text, you simply change the formats that make up the style. The text based on the style is automatically updated.

For example, if your main headings are 16 point, Times New Roman and bold, and you decide you want your headings to be 15 point, Nimrod and underlined, you would redefine the heading style in one step, rather than working through the document reformatting each individual heading.

Other features depend on the correct application of styles. For example, in order to create a table of contents you must first apply heading styles to the text you want to appear in the table of contents. Then, when you select **Table of Contents** from the **Insert** menu, the text to which you have applied heading styles is collected and displayed at a position of your choice.

Paragraph and Character Styles

There are two types of styles available for you to use - **paragraph** styles and **character** styles.

Paragraph styles can be applied to a minimum of one paragraph. They can contain a combination of any of the formats in the **Text Alignment, Tab Positions, Line Spacing, Borders** and can contain character formatting.

Character styles can be applied to a minimum of one character. They can contain a combination of any of the character formats - **Font**, **Font Size, Bold, Italics**, and **Underline**.

Applying Styles

To apply a paragraph style

- Position the insertion point in the paragraph you want to change

OR

- Select a group of paragraphs (you do not need to select all the characters in all the paragraphs) you want to change

> Warning   Do not select a group of characters in just one paragraph. If you do this, you will apply any character formats in the paragraph style to the selected text. You will not apply the paragraph style.

- On the **Formatting** toolbar, click the arrow on the **Style** list box

Style box
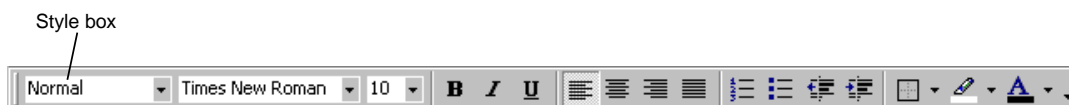
A drop-down list is displayed, previewing the key formats associated with the styles available.
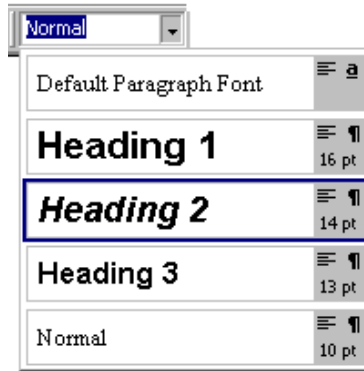
Drop-down list of available styles

This Attribute	Represents
Style name indented	Whether text is indented negatively or positively from the left margin
Style name's appearance	The exact formatting of the style (Font sizes of less than 8pt and greater than 16pt are displayed as 8 or 16pt respectively)
Four horizontal lines	Left, right, centred or justified alignment
a (Underlined a)	A character style
¶ (Paragraph mark)	A paragraph style

- Select the style you wish to apply

To apply a character style

- Position the insertion point in the word you want to change

> **Tip**   Automatic word selection must be turned on for this to work. From the **Tools** menu, select **Options...** then click the **Edit** tab. Make sure the **When selecting, automatically select entire word** box is checked.

OR

- Select the characters you want to change

- On the **Formatting** toolbar, click the arrow on the **Style** list box

A list of styles is displayed. The letter **a** appears beside character styles.

- Select the style you wish to apply

Modifying Styles

You can redefine the formats that make up a style. All the text that has that style applied to it in the current document will be updated automatically to reflect the changes.

You can modify a style by example or by using the **Style** dialogue box.

To modify a style by example

- Apply the style you want to modify to some text

- Make the formatting changes you want to the text

- From the **Style** list box, select the style you want to modify

The **Modify Style** dialogue box is displayed.
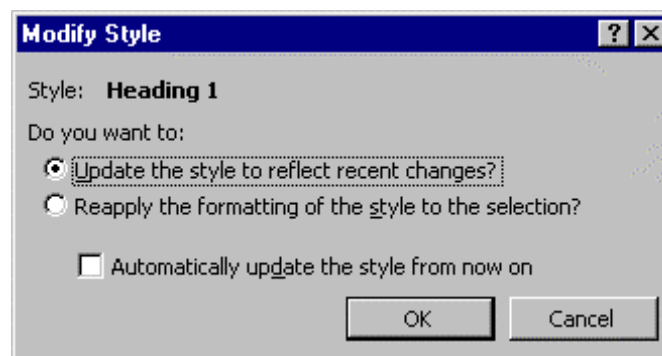
- Click the **Update the style to reflect recent changes?** option button

- Click **OK**

The modifications you have made to the style are applied to all text formatted with that style in the document.

To modify a style using the Style dialogue box

- From the **Format** menu, select **Style...**

The **Style** dialogue box is displayed.
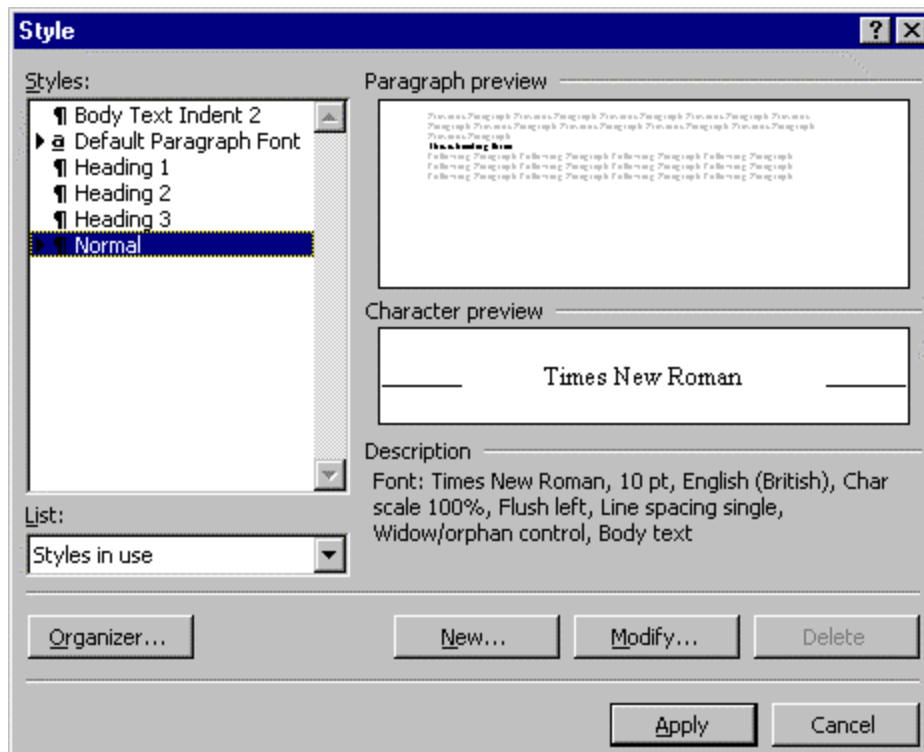
- From the **Styles:** box, select the style you want to modify

- Select **Modify...**

The **Modify Style** dialogue box is displayed.

- Click **Format**

```
    Font...
    Paragraph...
    Tabs...
    Border...
    Language...
    Frame...
    Numbering...
  Format ▾
```
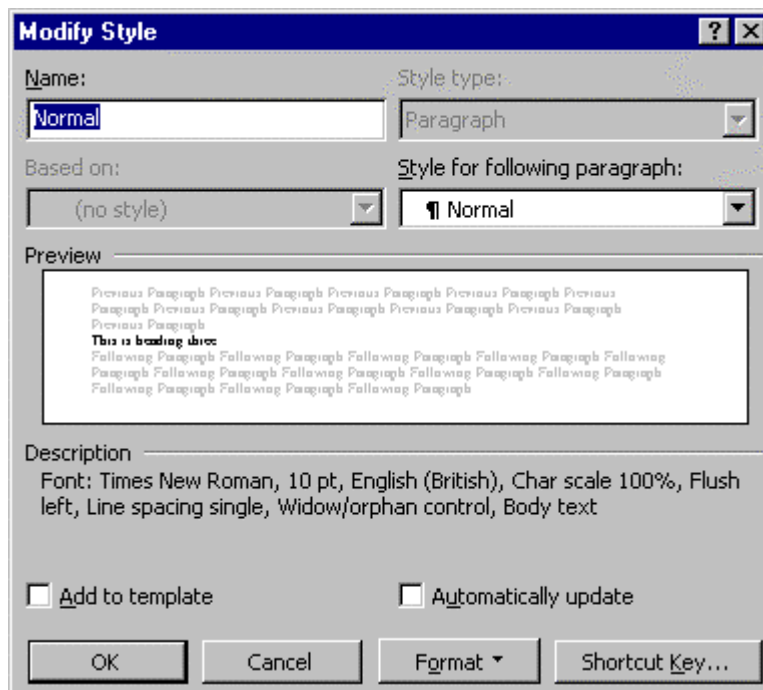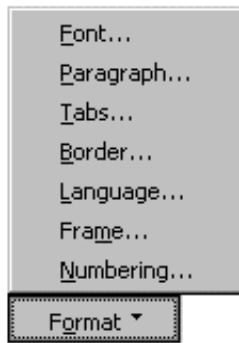
- Select an attribute, such as **Font** or **Numbering**, and make the changes you want

- Repeat for each attribute you want to modify

- From the **Modify Style** dialogue box, click **OK**

The **Style** dialogue box is redisplayed.

- Click **Close**

The modifications you have made to the style are applied to all text formatted with that style in the document.

Shortcut Keys

You can assign a shortcut key to a style you use regularly. Once you have assigned a shortcut key to a style, press the shortcut key to apply the style. Some built-in styles have a shortcut key already assigned.

Standard shortcut keys

The following keys can be used as shortcuts for applying styles.

Press	To Apply This Style
`Ctrl` + `Shift` + `N`	Normal
`Alt` + `Ctrl` + `I`	Heading 1
`Alt` + `Ctrl` + `2`	Heading 2
`Alt` + `Ctrl` + `3`	Heading 3
`Ctrl` + `Shift` + `S`	Any style (Activates the **Style** list box)

To assign a shortcut key to a style

- From the **Format** menu, select **Style...**

The **Style** dialogue box is displayed.

- From the **Styles:** list, select the style to which you want to assign a shortcut key

- Click **Modify...**

The **Modify Style** dialogue box is displayed.

- Click **Shortcut Key...**

The **Customize Keyboard** dialogue box is displayed.
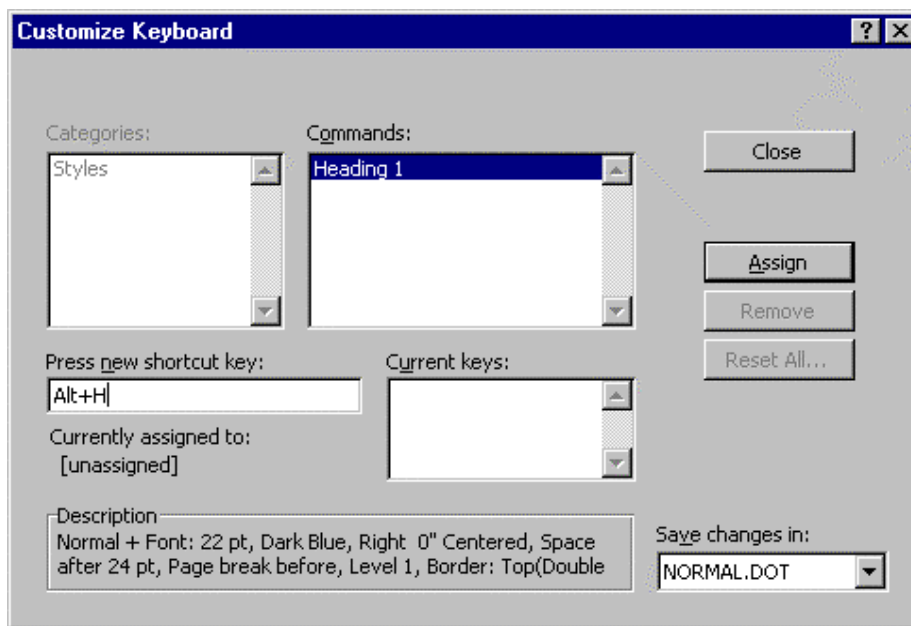
- In the **Save changes in:** box, select a template (or document) to store the keyboard shortcut in

- In the **Press new shortcut key:** box, press the keys you want to use for the shortcut

- Click **Assign**

- Click **Close** to return to the **Modify Style** dialogue box

- Click **OK** to return to the **Style** dialogue box

- Click **Close**

Tip	It is not advisable to override a shortcut key that has already been defined by Word.

Creating Your Own Styles

You can create your own styles to supplement Word's built-in styles.

To create a style by example

The quickest way to create a new paragraph style is to format a paragraph, select it, and then base the new style on the formatting applied to the selected text.

> Note   You can only create paragraph styles using this method.

- Select the paragraph that contains the formatting you want to include in your style

- On the **Formatting** toolbar, click in the **Style** list box

- Type over the existing style name to name the new style

- Press **Enter**

The new style is created and applied to the selected text.

To create a style from scratch

- From the **Format** menu, select **Style...**

The **Style** dialogue box is displayed.

- Click **New...**

The **New Style** dialogue box is displayed.
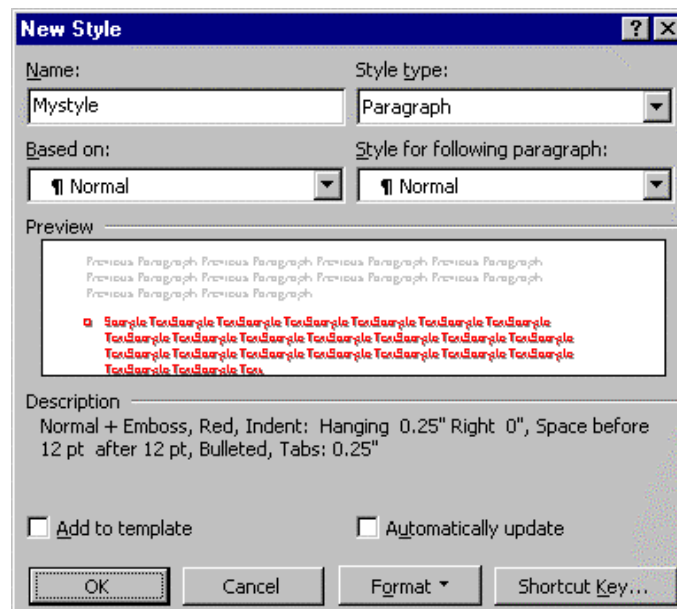
- In the **Name:** box type a name for the style

- In the **Style type:** box, click **Paragraph** to create a paragraph style or **Character** to create a character style

- In the **Based on:** box, select a style to base your new style on the formatting of an existing style

The new style will inherit the attributes of the existing style. If the existing style is changed, the changes will apply to styles based on it too.

- In the **Style for following paragraph:** select a style you want to apply to the next paragraph

When you press `Enter` at the end of a paragraph formatted with the new style, the style you have chosen in the **Style for following paragraph:** box is applied.

- Click **Format**

- Select an attribute, such as **Font...** or **Numbering...**, and make the changes you want to add to the new style

- When you have finished adding attributes, click **OK**

The **Style** dialogue box is displayed.

- Click **Close**

Applying Styles As You Type

Using the **AutoFormat As You Type** feature, Word can apply styles to text for you. It does this by guessing which style is appropriate to a block of text.

For example, if you type a few words on a single line, increase the font size, and centre the line, Word would automatically apply a heading style.

To define styles based on your formatting

- From the **Tools** menu, select **AutoCorrect...**

The **AutoCorrect** dialogue box is displayed.

- Select the **AutoFormat As You Type** tab

AutoCorrect

AutoCorrect | AutoFormat As You Type | AutoText | AutoFormat

Apply as you type
☐ Headings   ☑ Automatic bulleted lists
☑ Borders   ☑ Automatic numbered lists
☑ Tables

Replace as you type
☑ "Straight quotes" with "smart quotes"
☑ Ordinals (1st) with superscript
☑ Fractions (1/2) with fraction character (½)
☑ Symbol characters (--) with symbols (—)
☑ *Bold* and _underline_ with real formatting
☑ Internet and network paths with hyperlinks

Automatically as you type
☑ Format beginning of list item like the one before it
☑ Define styles based on your formatting

OK   Cancel

- Click the **Define styles based on your formatting** box and click **OK**

The Organizer

The **Organizer** allows you to delete styles you have created in error or which you no longer need. It also allows you to rename styles if you have used an inappropriate name and to copy styles to other document templates to make them available outside the document in which you created them.

To rename a style

- From the **Format** menu, select **Style...**

- Click **Organizer...**

The **Organizer** dialogue box is displayed.
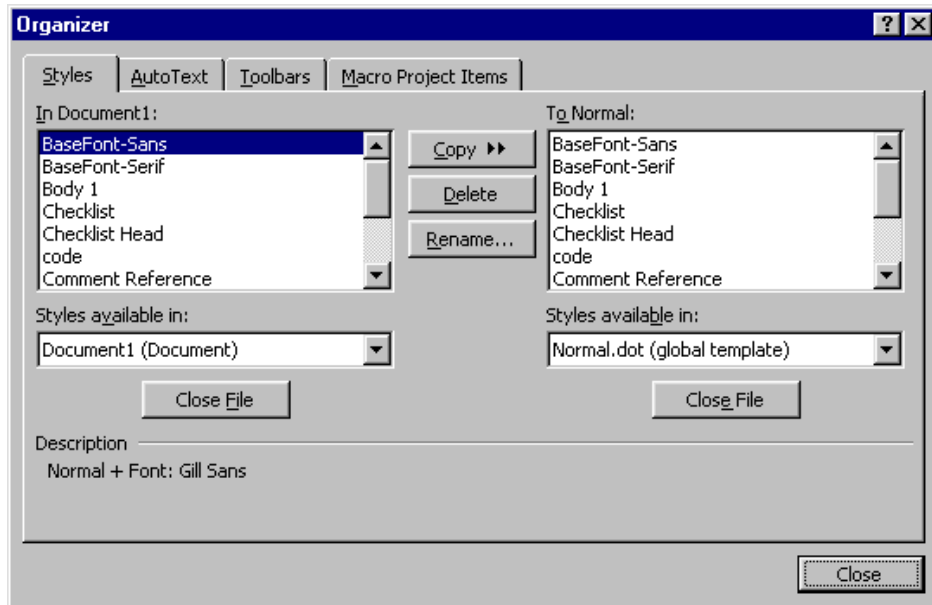
- From the **In:** list box on the left-hand side of the dialogue box, select the style you want to rename

- Click **Rename...**

The **Rename** dialogue box is displayed.
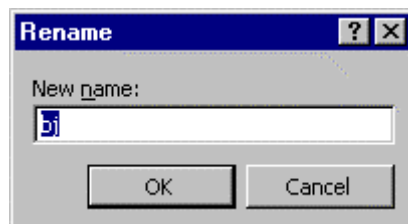
- Type the new name

- Click **OK**

The style is renamed.

To delete a style

Once you apply a built-in heading style to a paragraph in your document, you cannot remove it from the Styles list. Also, the Normal style cannot be deleted.

- From the **Format** menu, select **Style...**

- Click **Organizer...**

The **Organizer** dialogue box is displayed.

- From the **In:** list box on the left-hand side of the dialogue box, select the style you want to delete

- Click **Delete...**

A prompt box is displayed.
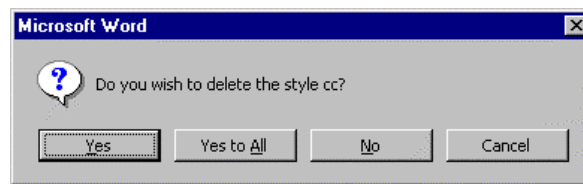
- Click **Yes**

The style is deleted. The Normal style is applied to all paragraphs formatted with the style you deleted.

To copy a style into the Normal template

When you create a new document all the styles are copied from the document template into the new document. From then on all new styles you create (and modifications to styles) are saved in the document.

If you wish to make new styles available in other new documents, you must copy the styles you have created back to the document template.

- From the **Format** menu, select **Style...**

- Click **Organizer...**

The **Organizer** dialogue box is displayed.

- From the **In:** list box on the left-hand side of the dialogue box, select the style you want to add to the **Normal** template

- Click **Copy**

The style is copied to **Normal**

> **Note**   The styles in the **Normal** template are available to all documents.

To copy a style into another template

- From the **Format** menu, select **Style...**

- Click **Organizer...**

The **Organizer** dialogue box is displayed.

- Below the **To:** list box on the right-hand side of the dialogue box, click **Close File**

The **Normal** template is removed from the **Style available in:** box and the **Close File** button is replaced by the **Open File ...** button.

- Click **Open File...**

The **Open** dialogue box is displayed.

- Select the template you want to copy the style into and click **Open**

The **Organizer** is redisplayed.

- In the **In:** box on the left-hand side of the dialogue box, click the style you want to add to the template

- Click **Copy**

The style is copied into the template.

Styles and templates

When you attach a template to a document the styles in the template are copied into the document. If you then change the formatting of a style in the document, you have three choices:

- Preserve the changed style in the document only - from the **Tools** menu, select **Templates and Add-Ins...** and ensure the **Automatically update document styles** box is **unchecked**

- Copy the changed style back to the template - use the Organizer to copy the style back to the template or from the **Modify Style** dialogue box, check the **Add to template** box

- Discard the changes and apply the original template style - in the **Templates and Add-Ins...** dialogue box, ensure the **Automatically update document styles** box is **checked**

In the last case, any differences between the style in the template and the style in the document are discarded each time the document is opened. As usual, any formatting applied **directly** to text is not affected.

The Style Gallery

The **Style Gallery** allows you to view the styles contained in all templates on your system. If you see a set of styles you like, you can copy them into your document.

To see the styles

- From the **Format** menu, select **Theme...**

The **Theme** dialogue box is displayed.
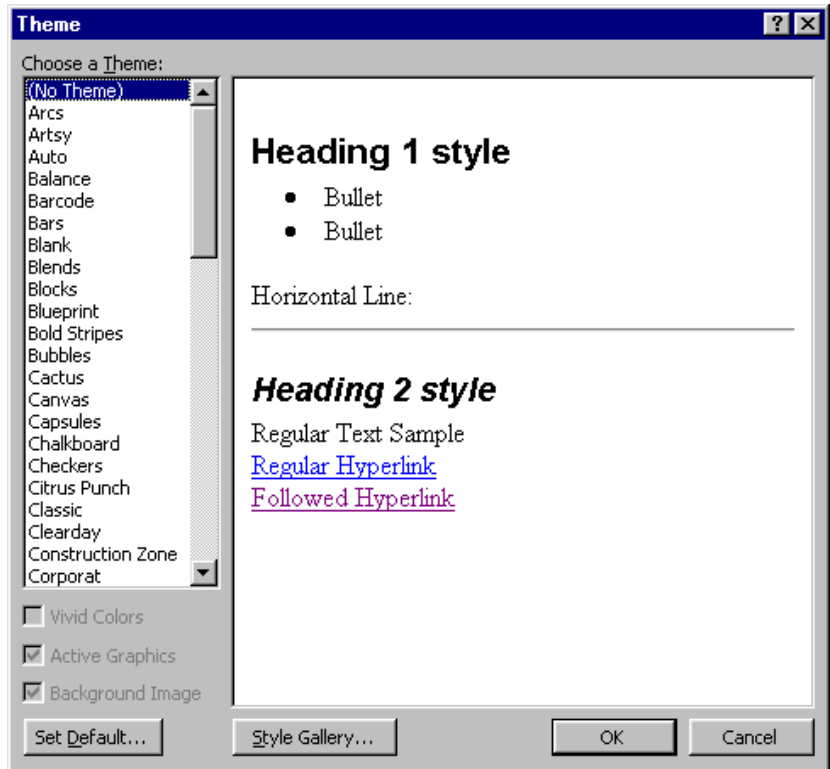
- Click **Style Gallery...** at the bottom of the dialogue box

The **Style Gallery** dialogue box is displayed.

Theme dialogue box
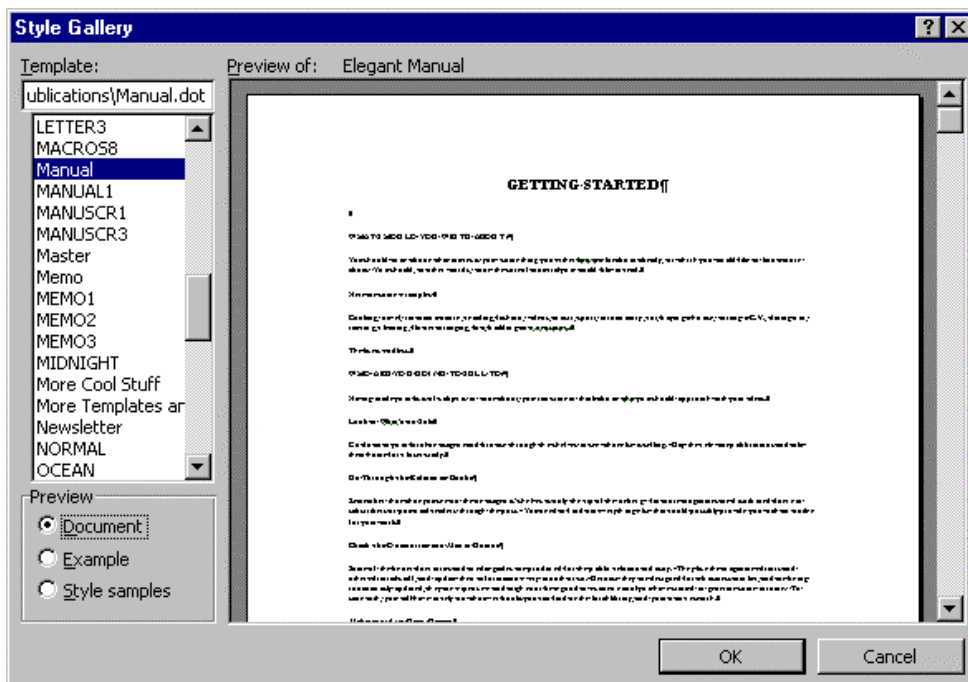
- In the **Template:** list box, click a template

In the **Preview of:** box you can see how the styles in the template would effect the current document if you applied them.

- In the **Preview** panel, click **Example** to see the styles applied to a sample document
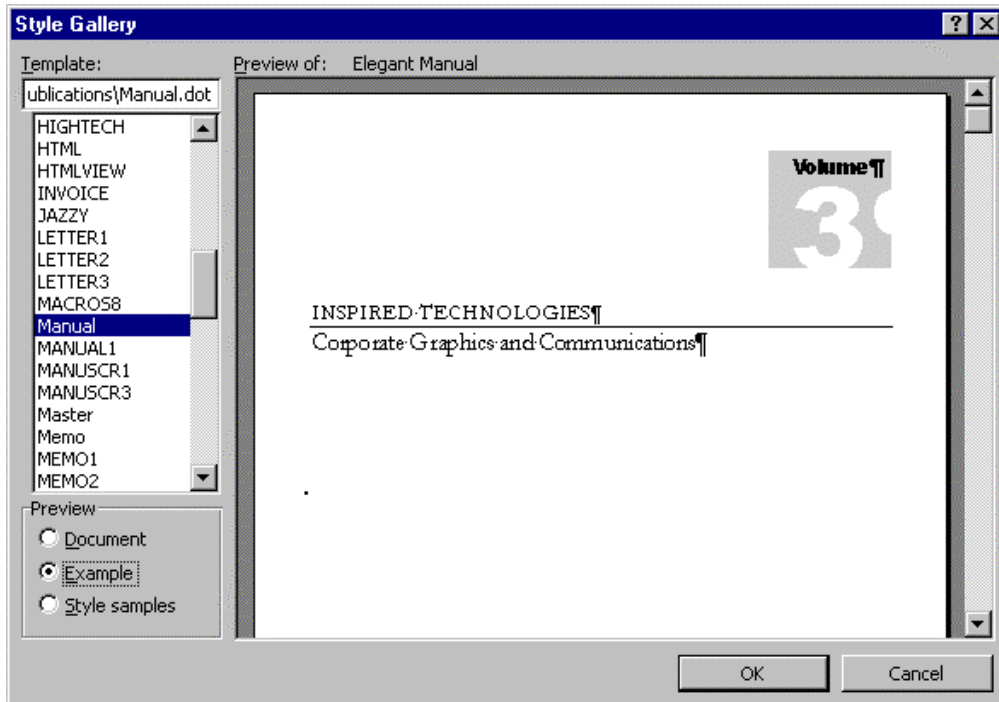
- In the **Preview** panel, click **<u>Style samples</u>** to view all the styles in the template
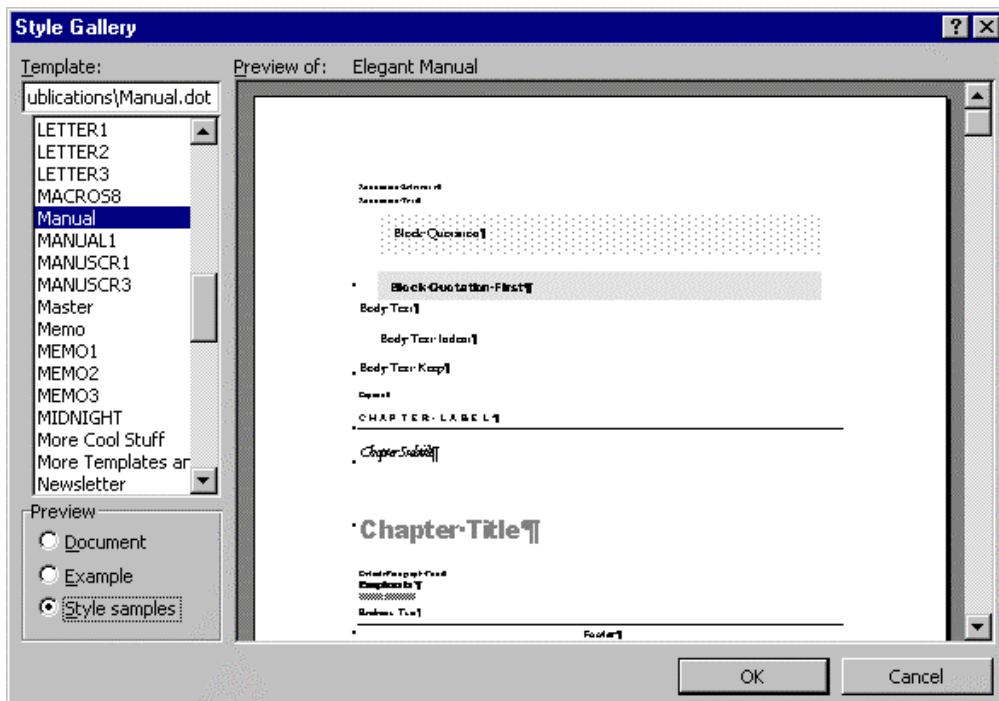
- Click **OK**

The styles are copied into your document.

Exercises

Working with Styles

- Open the document **STYLES**

- Apply the Heading 1 style to the title "GETTING STARTED"

- Apply the Heading 2 style to the subtitles

  > WHAT SHOULD YOU WRITE ABOUT?
  > WHO ARE YOU GOING TO SELL TO?
  > WHAT DO YOU DO NEXT?

- Modify the styles Heading 1 and Heading 2 so that they include your choice of formats

- Create a new style called **MyStyle**, which contains a bullet or a number format and apply it to the list on page 2

  > Test Your Ideas
  > Write a Synopsis
  > Send out Your Letters
  > Keep a Record and Then Follow Up
  > Write the Piece Anyway
  > Master the Style of Other Writers

- Add **MyStyle** to the Normal template

- Save the document

- Choose a new look for **STYLES** using the Style Gallery

- Close the document without saving

Desktop Publishing

Objectives

Generally	To use some of Word's desktop publishing features.
Specifically	On completion of this section, you will be able to:

- Use **text flow** options
- Balance **column** lengths
- Insert **pictures**, **clip art** and **scanned** images
- **Align** text around pictures
- Create **watermarks**
- Add **page borders**

Word's desktop publishing features allow you to create newsletter or brochure type documents that incorporate page borders, text shading, pictures and clip art. Using text boxes and columns you can use different page layouts and designs.

Text Flow Options

Word paginates your documents automatically. When there is too much text to fit on a page (or in a column) Word inserts an automatic page break (also called a "soft" page break). This can cause lines of text to become **widowed** and **orphaned**. Widows and orphans are lines that get separated from the rest of the paragraph and appear on their own at the top or bottom of a page. You can set paragraph options that prevent this from happening. You can also set options to keep certain paragraphs together (for example, headings with body text).

If you use columns to layout text on the page, you can create evenly balanced columns using section breaks.

To control line and page breaks in paragraphs

- Select the paragraphs you want to set line and page break options for

- From the **F**o**rmat** menu, select **Paragraph...**

- Click the **Line and** **P**a**ge Breaks** tab
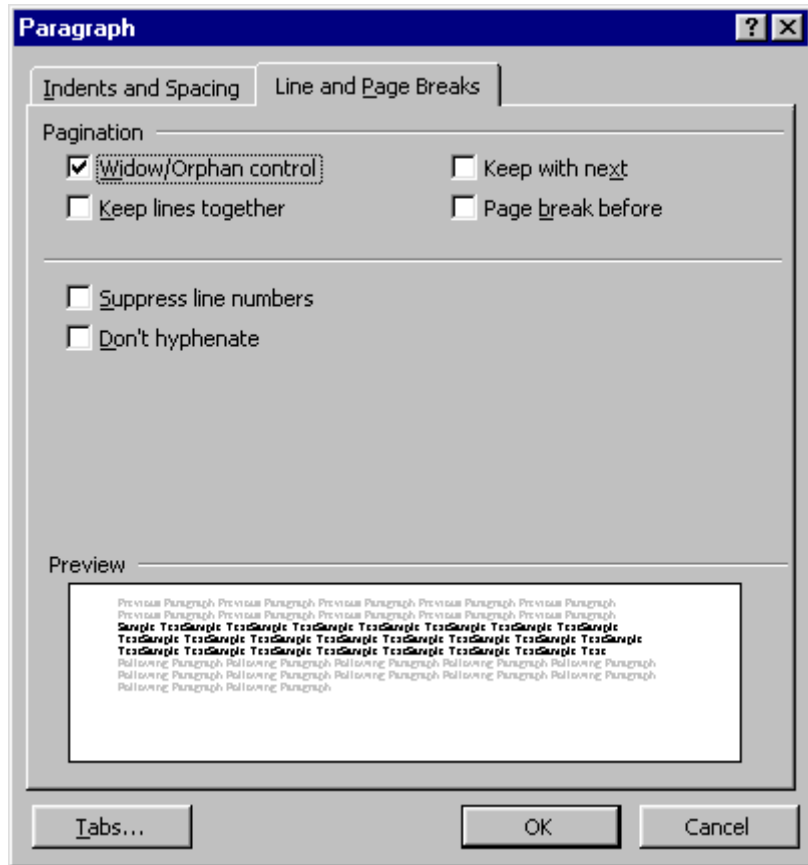
- Set the options you want according to the table below

Select	To
Widow/Orphan control	Prevent single lines of a paragraph getting separated by automatic page or column breaks.
Keep lines together	Prevent an automatic page or column break splitting any part of the paragraph. The whole paragraph will move to the next page.
Keep with next	Prevent an automatic page or column break splitting two paragraphs. Both paragraphs will move to the next page.
Page break before	Start the paragraph on a new page.

- Click **OK**

To create balanced newspaper columns

Text in newspaper columns flows continuously from the bottom of one column to the top of the next column. Normally the column will extend to the bottom of the page. However, you can force text into a new column using a continuous section break.
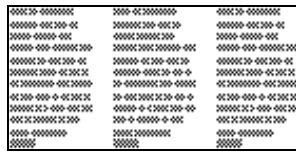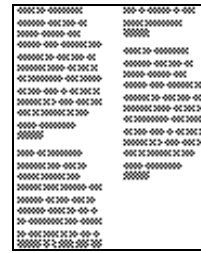
Balanced columns   *Unbalanced columns*

- Format your text in columns

- In **Print Layout** view, click in the point where you want to balance the columns

Note   This can be in the middle of a column.

- From the **Insert** menu, select **Break...**

The **Insert Break** dialogue box is displayed.
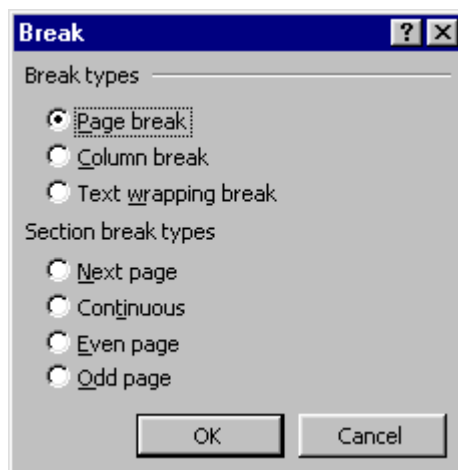
- Under **Section break types** click the **Continuous** option button

- Click **OK**

Tip   Next, odd and even page section breaks will not balance text in the
column evenly. To start a new page after the balanced columns,
position the insertion point after the **continuous** section break and
insert a hard page break (*SpeedKey:* `Ctrl` + `Enter`) or a section
page break.

Creating New Page Layouts with Text Boxes

Using **Text Boxes** text can be placed anywhere on the page. Text boxes can be linked, so that
Word automatically moves text that cannot fit in the first text box into the next one. This means

that if you need to make changes to the text, you do not have to cut-and-paste it endlessly between text boxes to get the fit just right.

Text that is supposed to go together is called a **story**. Using text boxes you can have more than one story on a page (for example, a bilingual document might have the same content in two languages side-by-side). Also, linked text boxes do not have to be on the same page (but they do have to be in the same document).

You can choose to have a normal rectangular shape for your text box or you can place your text inside a circle, banner, flow chart shapes and other AutoShape containers.

To create linked text boxes

It is a good idea to draw on paper the page layout you want to achieve before you begin, to get a rough idea of the size and position of the text boxes.

- Switch to **Print Layout** view and display the **Drawing** toolbar

- On the **Drawing** toolbar, click **Text Box** 📰

  OR

- From the **Insert** menu, select **Text Box**

The **Text Box** tool is selected.

- Move the mouse pointer to where you want the text to begin

The mouse pointer changes to a cross-hair shape.

- Press-and-hold down the mouse button

This sets the left edge of the new text box.

- Drag the mouse pointer to where you want to fix the right edge of the new text box

- Release the mouse button

When you release the mouse button, a text box is created. The insertion point is displayed inside the text box.
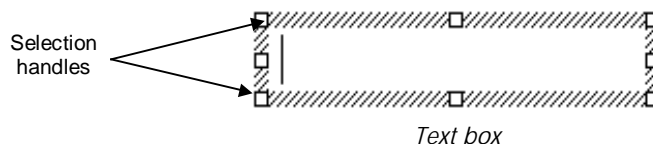
Text box

- Repeat the above steps to add more text boxes to your page layout

- If necessary, adjust the size (by dragging its selection handles) and position (by dragging its border) of the text boxes

- When the boxes are positioned correctly, select the text box that will contain the first block of text

The **Text Box** toolbar is displayed.
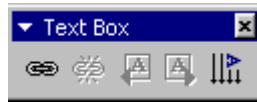
Text Box toolbar

- On the **Text Box** toolbar, click **Create Text Box Link** ⊕

OR

- Right-click the text box border and from the shortcut menu, select **Create Text Box Link**

The mouse pointer changes into a pitcher with a downward arrow.

- Move the pitcher over the next text box that you want the text to flow to

The pitcher icon changes to show a pouring pitcher.

- Click the left mouse button to create the link

- Repeat the above steps to create the next link(s)

Tip	If you click Create Text Box Link ⊕ and then decide you don't want to link to another text box, press Esc to cancel.

- In the first text box, type or paste the text that you want

Note	You cannot paste text containing a section break into a text box.

When the text reaches the edge of the first text box, it will automatically flow into the other text boxes that you have linked.

To change the appearance of a text box

You can make all the usual font and paragraph changes to text in a text box. You can also change the appearance of the box itself.

Using the **Format** commands, you can change the border and shading options for a text box and adjust the size and margins. You can even swap the box for another shape.

- Click in the text box and from the **Format** menu, select **Text Box...**

OR

- Right-click the border of the text box and select **Format Te_x_t Box...**

The **Format Text Box** dialogue box is displayed.
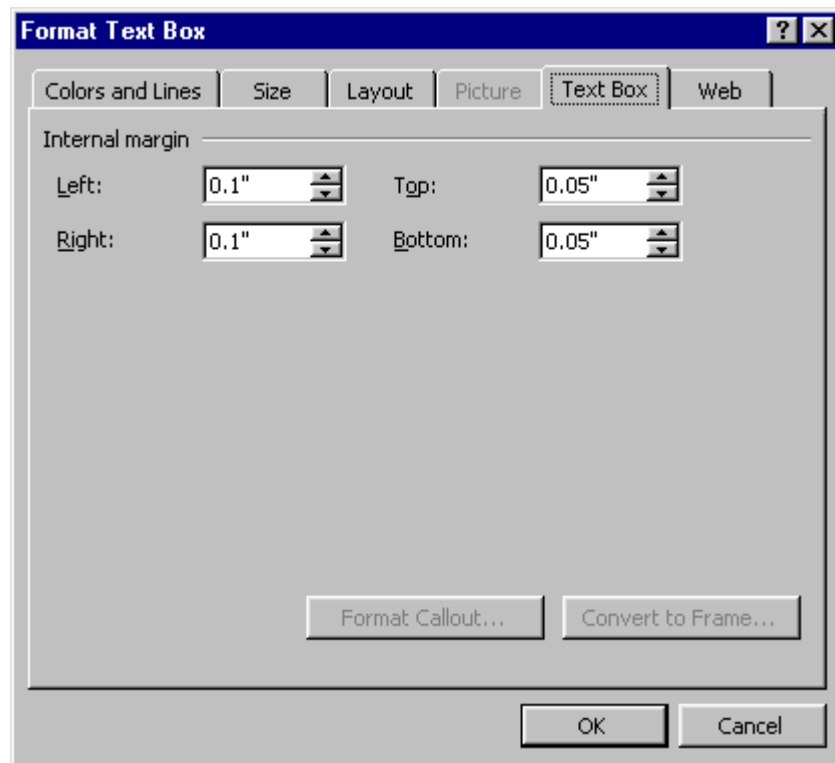
- Click the **Text Box** tab

This part of the dialogue box lets you set the internal margin of the text box (the distance betweeen the text and the text box border).

- Enter the margin settings you want then select the **Colors and Lines** tab
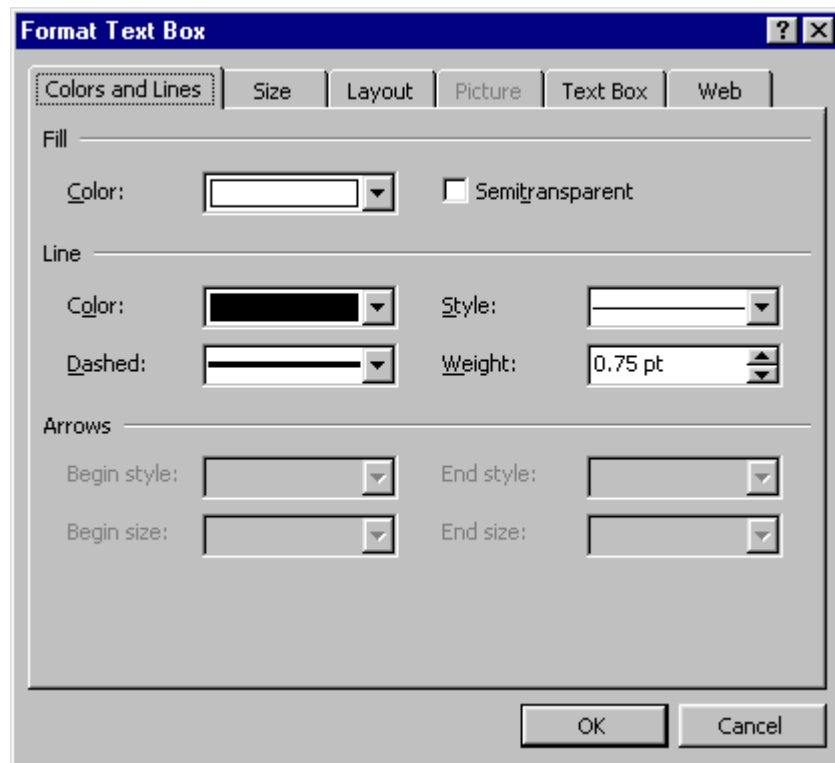
- From the **Color:** drop-down list box, select a background colour or fill effect

> **Tip**   If the fill colour is too bright and makes the text illegible, select the **Semitransparent** check box.

- From the **Line** panel, select the line style, colour and weight

- If you want to control the size of the text box precisely, click the **Size** tab and enter measurements in the **Height:** and **Width:** boxes

- Click **OK**

To change the shape of the text box

Text boxes are automatically created with a rectangular container shape, but you can change this to any kind of AutoShape.

- Select the text box(es) whose shape you wish to change

- On the **Drawing** toolbar, click **Draw**

- Select **Change Autoshape**
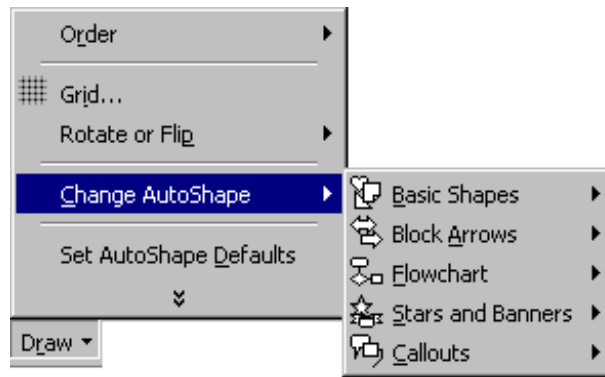
- Choose which category you want and then a shape from within that category

> **Tip**   Set format options for the AutoShape in the same way as for a text box.

Inserting Pictures into a Document

As well as being able to create simple pictures using the Drawing tools, you can also insert pictures from other sources into your Word documents. You can obtain pictures from a wide range of sources, including **clip art** and **pictures** from the Clip Gallery, **GIF** and **JPEG** images from websites and images you capture using a **scanner**.

You can control the appearance (for example, adjust brightness, contrast and size or add a border) of most pictures using the **Picture** toolbar. Furthermore, some types of picture can be edited with Word's drawing tools, to change colours or add and remove parts of the image. Pictures such as **clip art metafiles** from the **Clip Gallery** can usually be edited in this way.

Finally, you can add captions or labels to a picture and control where it appears on the page, making text flow around or over it.

To insert a picture from the Clip Gallery

- On the **Drawing** toolbar, click **Insert Clip Art**

OR

- From the **Insert** menu, select **Picture**

- From the cascading menu, select **Clip Art...**

- Select a category from the **Categories** list

- Select the clip you want then click **Insert Clip** on the shortcut bar

The clip art selected is inserted in your document.

- On the **Insert ClipArt Title** bar, click the **Close** button ✕

To insert a picture from another file

- From the **Insert** menu, select **Picture**

- From the submenu, select **From File...**

The **Insert Picture** dialogue box is displayed.
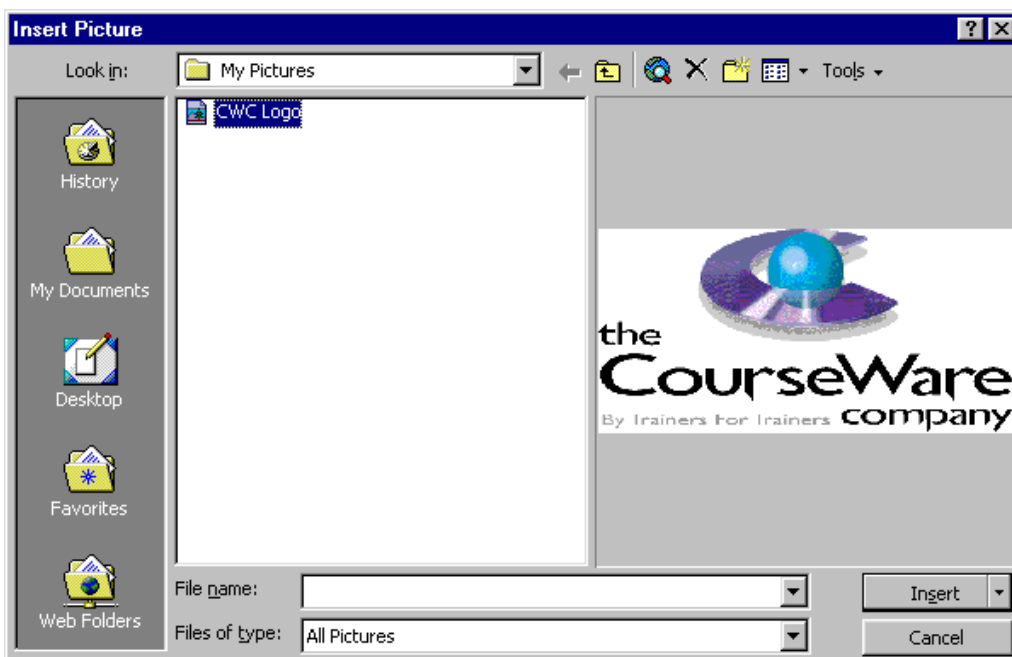
- In the **Files of type:** box, select **All Pictures**

- In the **Look in:** box, select the folder containing the picture you want

- Click the file name of the picture you want to insert

- Click **Insert** to embed the picture in your Word document

OR

- Click the down arrow on the **Insert** button and select **Link to File**

<table>
<tr><td>Note</td><td>Linking to the picture file reduces the overall file size of your Word document, but you cannot edit it from within Word. If you want to make changes to the picture, you must open the original file to edit it. Then in Word, select the picture and press <code>F9</code>.</td></tr>
</table>

To scan a picture and insert it in a document

To scan a picture, your scanning device (a scanner or digital camera) must be connected to your computer and be **TWAIN**-compatible.

If you are not sure whether your scanning device is TWAIN-compatible, check the instruction manual or contact the manufacturer.

- Place the picture in the scanning device

- From the **Insert** menu, select **Picture**, and then click **From Scanner or Camera...**

- Select the device you want to use from **Device**

- Select an image resolution option, as explained in the table below

Select	To
Web Quality	Use a low resolution (for example, if you intend for your document to be viewed on screen).
Print Quality	Use a higher resolution (for example, if you intend for your document to be printed).

- Select a button to start the scan, as explained in the table below

Select	To
Insert	Use the default settings from your scanner to scan your picture.
Custom Insert	Change image settings from your scanner or digital camera. Follow the instructions that come with the device you are using.

<table>
<tr><td>Note</td><td>If the **Insert** button is unavailable, your scanner or camera software may not support automatic scanning. Use the **Custom Insert** button instead.</td></tr>
</table>

The picture will be scanned and after some time, appears in your document. You can now make any changes you want to it.

- Use the tools on the **Picture** toolbar to crop the picture, adjust its brightness, contrast, and colour, and to make other adjustments

To use the Picture toolbar
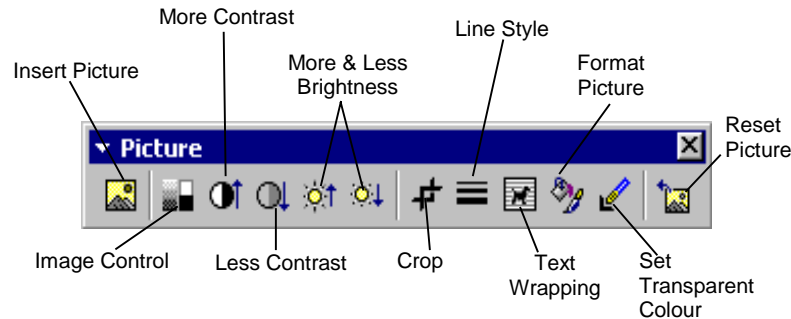
The **Picture** toolbar is displayed when a picture is selected. The table below explains each tool.

Click		To
	Insert Picture from File	Display the **Insert Picture** dialogue box.
	Image Control	Display settings that allow you to change the selected graphic object to **Greyscale**, **Black and White**, **Watermark** or **Automatic**.
	More and Less Contrast	Add or reduce the contrast between the different colours used in the graphic object.
	More and Less Brightness	Lighten or darken the colours used in the graphic object.
	Crop	Enable the cropping tool to allow you to remove sections of the graphic.
	Line Style	Display the **Line Style** menu for adding a border to the selected graphic object.
	Text Wrapping	Select a different **Text Wrapping** option to control the way text is placed around the picture.
	Format Picture	Display the **Format Picture** dialogue box. Set options for crop, contrast and brightness more precisely using the **Picture** tab.
	Set Transparent Colour	Set one colour in a picture to transparent. This does not work for all types of picture.
	Reset Picture	Return the graphic to its original settings.

> **Tip** If the **Picture** toolbar is not displayed when you select an object, from the <u>V</u>iew menu, select <u>T</u>oolbars then click **Picture**.

Aligning Text Around Objects

By default, when you insert pictures into your document, they appear **inline** with your text. This means that you can select them as though they were text characters.

Inline with text is an object **text wrapping** style. You can change this text wrapping style to control the way text and objects appear together on the page. All **objects** (including text boxes, AutoShapes, drawings, clip art and so on) have a text wrapping style.
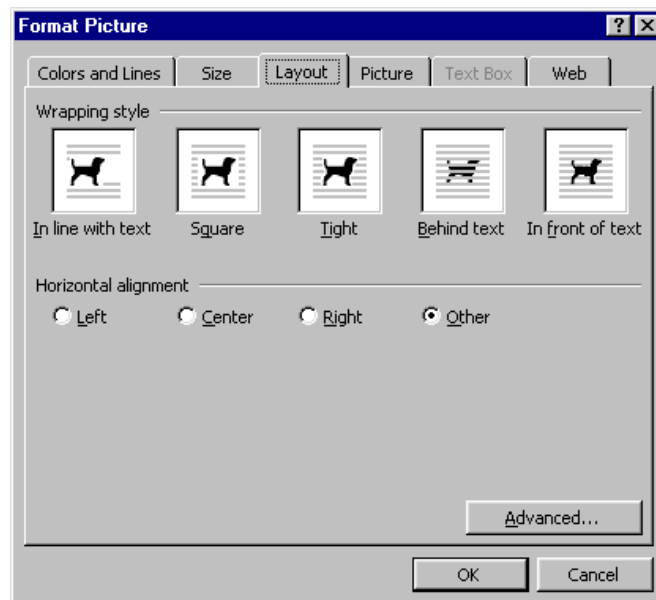
To change the text-wrapping style for objects

- Select the object and from the **F<u>o</u>rmat** menu, select **P<u>i</u>cture...**

> **Tip** The option will change depending on the exact type of object. For example, for an AutoShape the **Format** menu option will be **AutoShape**, for a scanned picture it may be **Object**.
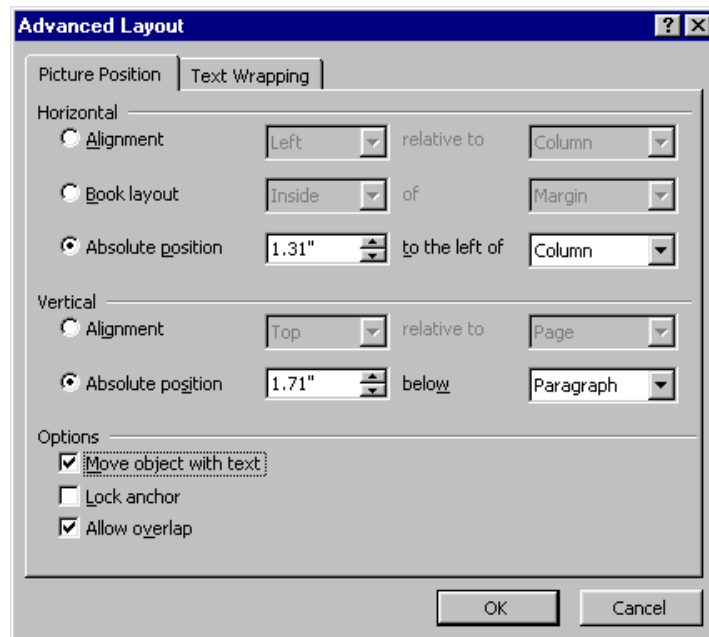
OR

- Right-click the picture and from the shortcut menu, select the **Format** command for the type of object (for example, **AutoShape** or **Picture**)

- Click the **Layout** tab

- Click the text-wrapping style you want

When an object is not inline with text, it has an **anchor icon** ⚓ that shows you which line of text the object is associated with. If you delete the paragraph the anchor is inside or next to, the object will be deleted also.
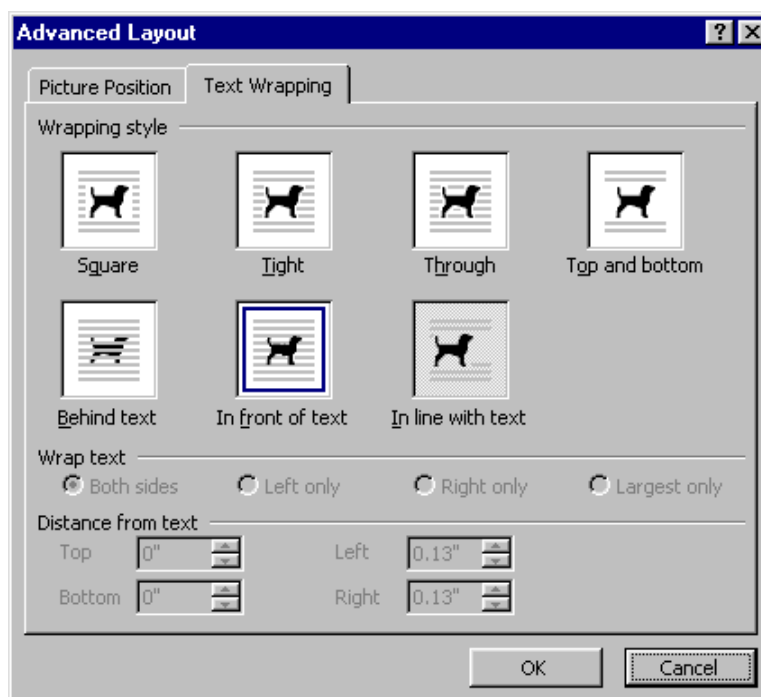
- Select a **Horizontal alignment** button to align the object relative to the page margins
OR

- If you want to set more precise text wrapping options, click the **Advanced...** button

- Set options as explained in the table below

Select	To
From the Horizontal panel	
Alignment	Align the object relative to the page, margin, column or character (The character used is the one nearest the anchor icon).
Book layout	Position the object against the inside or outside margin or page edge. The advantage of this option is that it adjusts automatically if the object moves from an odd to an even page and vice versa.
Absolute **p**osition	Enter a precise position for the object relative to the page, margin, column or character. (This option is set automatically if you use drag-and-drop to move the object).
From the Vertical panel	
Alignment	Align the object relative to the page, margin or line.
Absolute po**s**ition	Enter a precise position for the object relative to the page, margin, line or paragraph. (This option is set automatically if you use drag-and-drop to move the object).
From the Options panel	
Move object with text	Move the object when the paragraph containing the anchor icon is moved up or down the page.
Lock anchor	Keep the anchor icon in the same position on the page when you move the object around the page. This is useful if you always want an object to be associated with a particular bit of text.
Allow o**v**erlap	Position one object over another. Note that **both** objects must have the **Allow overlap** box checked.

- Click the **Text Wrapping** tab

- Set **Wrapping style** options as explained in the table below

Select	To
Square	Wrap text around the object's square bounding box. Every object has a virtual bounding box, even if it is not square in shape.
Tight Through	Wrap text around the edges of the object itself rather than its bounding box. The difference between these two options only becomes apparent if you edit the **wrap points** of the object (see below).
Top and bottom	Force text above and below the object.
Behind text In front of text	Make text overprint the object (or vice versa). You will probably need to adjust the contrast and brightness of the object to make the text legible.
Inline with text	Make the object behave like a normal text character, which you can select with the insertion point. You can also apply normal paragraph and font formatting commands on the object. Note that this option is not available with every type of object.

- If you select one of the options from the top row, you can refine the way text wraps by setting values in the **Wrap text** and **Distance from text** panels

- Click **OK** to exit from the dialogue boxes

To set text wrapping options using the Picture toolbar

As well as containing shortcuts for the more commonly used text wrapping options, you can use the **Text Wrapping** button on the **Picture** toolbar to edit the **wrap points** around a picture. This way you can get text to wrap close-up to irregularly shaped objects.
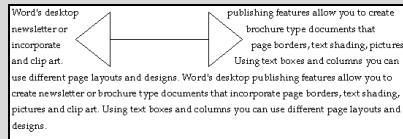
- Select the object

- If the **Picture** toolbar is not displayed, from the **View** menu select **Toolbars** then **Picture**

- On the **Picture** toolbar, click **Text Wrapping**

- Click the text wrapping option you want
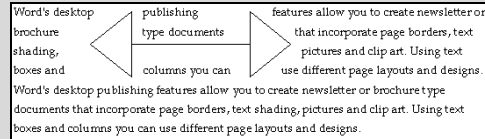
To wrap text to irregular objects:

- Select the **Tight** or **Through** wrapping option

Word's desktop publishing features allow you to create newsletter or incorporate page borders, text shading, pictures and clip art. Using text boxes and columns you can use different page layouts and designs. Word's desktop publishing features allow you to create newsletter or brochure type documents that incorporate page borders, text shading, pictures and clip art. Using text boxes and columns you can use different page layouts and designs.

Tight wrapping

Word's desktop publishing features allow you to create newsletter or brochure type documents that incorporate page borders, text shading, pictures and clip art. Using text boxes and columns you can use different page layouts and designs. Word's desktop publishing features allow you to create newsletter or brochure type documents that incorporate page borders, text shading, pictures and clip art. Using text boxes and columns you can use different page layouts and designs.

Through wrapping

- Click **Text Wrapping** again and select **Edit Wrap Points**

The object is displayed with a dotted red line around it.
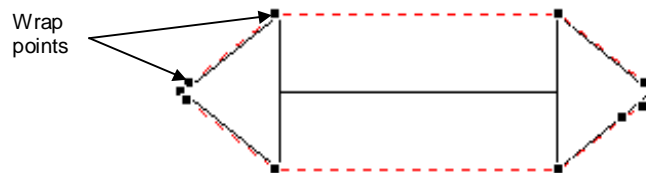
Wrap points

- Click-and-drag each wrap point to set the wrapping boundary for the object

- Click away from the object to finish

Creating Watermarks

A **watermark** is text or pictures that are placed behind the main body of the text that appears on each page. For example, you could use a watermark to put "Draft" or "Copy" in the background whilst a document is being worked on. Alternatively, a company logo and address information could be added to each page of a letter.

To create a watermark, you must insert it into a header or footer. However, the watermark does not need to go in the normal header and footer areas at the top or bottom of the page. You can place it wherever you like on a page.

To add a watermark to a document

- From the **View** menu, select **Header and Footer**

- From the **Insert** menu, select the type of object you want to use as a watermark

You can use almost any sort of object in a watermark, including text boxes, AutoShapes, WordArt, a Word drawing or a picture.

- Use the **Format** dialogue box to select a text-wrapping style and position the object on the page

> **Tip**   Select **Behind text** or **In front of text** to stop the watermark interfering with the position of text on the page.

- You can add other objects if you like

For example, use a text box with your contact details along with a graphic of your company logo to create a personalised letterhead.

> **Note**   In **Header and Footer** view, body text is greyed out. To view the watermark as it will appear when printed, on the **Standard** toolbar, click **Print Preview** .

- On the **Header and Footer** toolbar, click **Close**

Creating and Modifying Page Borders

Page borders are graphical images (pictures or lines) placed around the edge of a page to form a border. Borders can be added to any or all sides of each page in a document, or to certain sections, or to the first page only, or to all pages except the first page.

Word itself has more than 150 border styles to choose from. In addition, you can access **Publisher's Border Art for Page Borders**, which include more than 160 art styles.

To add a border to a page

- From the **Format** menu, click **Borders and Shading**, and then click the **Page Border** tab
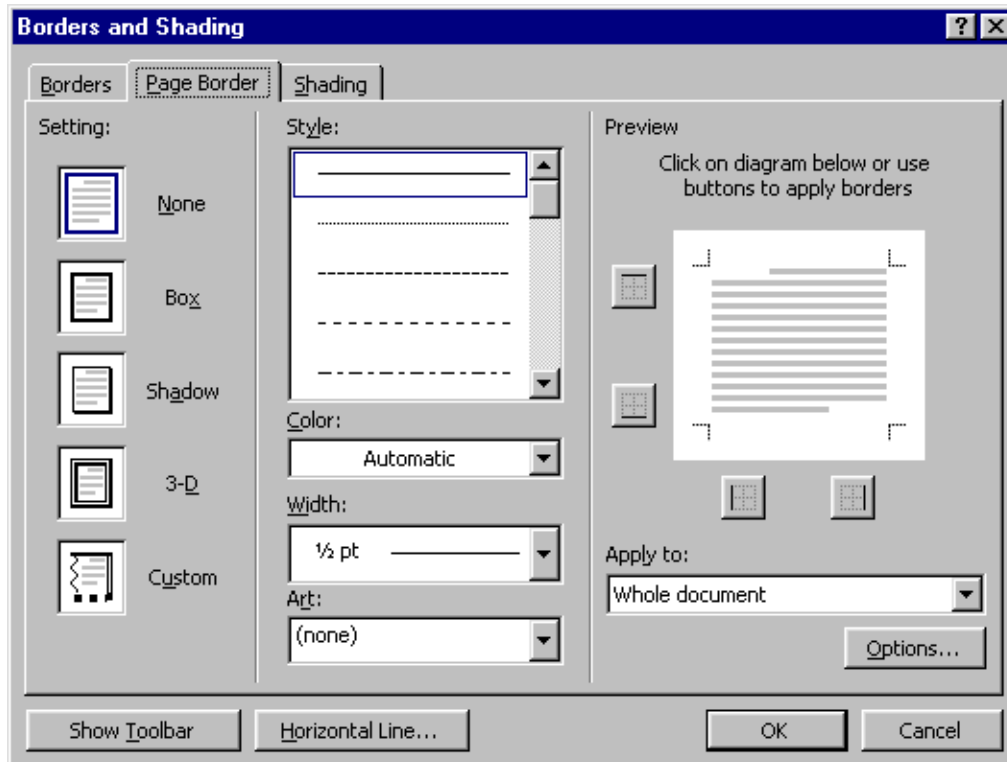
Borders and Shading dialogue box

- From the **Apply to:** box, select which pages or sections you want the border to appear on

- From the **Style:**, **Color:** **Width:** and **Art:** boxes, select the format options you want for the border

- From the **Settings** panel, select a border style (plain box, shadow or 3-D)

- If you do not want a border to appear on all sides of the page, click the buttons in the **Preview** pane to add and remove lines on the top, bottom, left or right sides

- Select the **Options...** button to change the distance between the border and the edge of the page and set whether to include the header and footer or not

Exercises

Creating a Newsletter

- Create a new blank document

- Create four text boxes as shown below
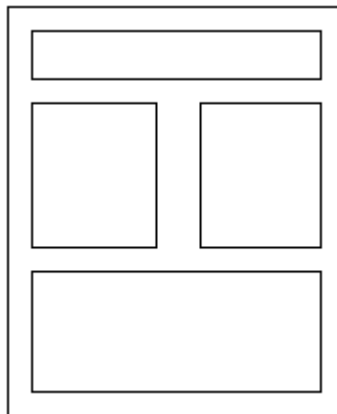
- Save the document as **MILLENNIA NEWSLETTER**

- Open **NEWSLETTER** and select the heading "Company Profile", copy this to the top text box in **MILLENNIA NEWSLETTER**

- Centre the heading and enlarge it to a suitable size

- Return to **NEWSLETTER** and copy all the text for the "Overview" and "Management Profile" headings to the next text box on the left of the page in **MILLENNIA NEWSLETTER**

- Link the left-hand text box to the right-hand text box to ensure all the text is shown

- Insert a picture from the Clip Art Gallery in the text in the right-hand text box

- Align the text around the graphic (experiment with different text wrapping options and observe their effects)

- Return to **NEWSLETTER** and copy the page "Business Units" to the final text box at the bottom of the page in **MILLENNIA NEWSLETTER**

- Resize and reposition the text boxes so that all the text is visible

- Apply borders and shading to the text boxes and reformat the text to improve the presentation of the newsletter

- Create a **SAMPLE** watermark (You may need to make the text box shading semi-transparent in order to see the watermark)

- Add a page border to complete your newsletter

- Save and print your newsletter

Long Documents

Objectives

Generally   To work with long documents efficiently and effectively.

Specifically   On completion of this section, you will be able to:

- **Sort** lists and tables
- Work in **Outline** view
- Use **find** and **replace**
- Create a **table of contents**
- Create an **index**
- Create **cross-references** and **bookmarks**
- Insert **footnotes** and **endnotes**
- Automatically **summarise** a document

Word provides you with a number of features that allow you to work efficiently with long documents. Some of the features require you to have applied styles first.

♦ You can sort paragraphs (and tables) in alphabetical, numerical or date order

♦ You can collapse and expand a long document so that you can see just either main headings, or main headings and subheadings, or all text using **Outline** view

♦ You can search for and replace text which has a specific format, special characters or non-printing elements

♦ You can generate a contents page with page numbers in a table of contents

♦ You can list all the page numbers where a word or phrase is found in a document in an index

♦ You can mark a page to enable you to move back to it quickly using a bookmark

♦ You can provide extra information at the bottom of a page or end of a document about a term or phrase using footnotes and endnotes

♦ You can create a summary of a document using the **AutoSummarise** feature

Sorting Lists and Tables

You can sort text in lists and tables by text, numbers and dates in either ascending order (A to Z, 0 to 9, earliest date to latest date) or descending order (Z to A, 9 to 0, latest to earliest date).

The rules for each type of sort are shown in the table below.

Sort By	Result
Text	In ascending order, items (paragraphs or table cells) that start with punctuation appear at the top of the list, then numbers then text (A first, Z last).
Number	Word searches the item for any instance of a number. All other characters are ignored. The number can be in any part of the paragraph.
Date	For Word to recognise a date, you must use one of the following date separators: hyphens (-), colons (:), commas (,), forward slashes (/) and full stops (.).

Note   If a character is not recognised, it will appear at the top of the list (ascending sort) or the bottom of the list (descending sort).
If items in the list begin with the same character, number or date, Word will look for the next character/number/date in each item to determine which comes next.

To sort paragraphs

- Select the paragraphs to sort

- From the **Table** menu select **Sort...**

The **Sort Text** dialogue box is displayed.
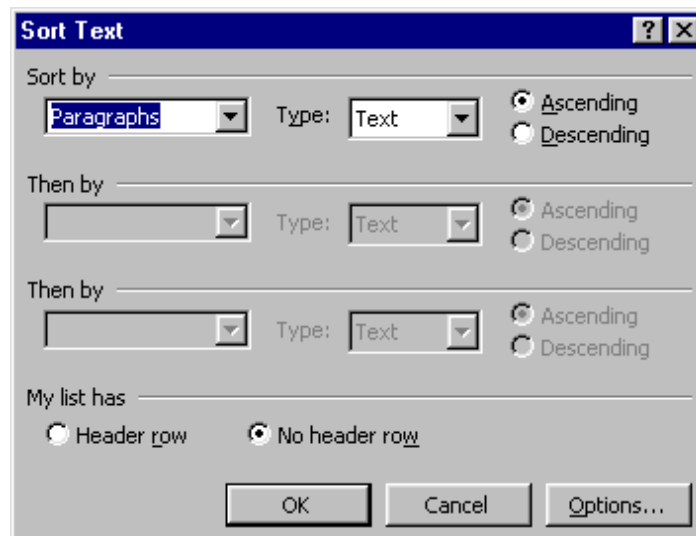
Sort Text dialogue box

- Select the **Header row** button if your list has a header that should stay at the top

- From the **Type:** box, select **Text**, **Number** or **Date** and click <u>**A**</u>**scending** or <u>**D**</u>**escending** as appropriate

- Click **OK**

To sort a table

- Select the table

- From the **T<u>a</u>ble** menu select <u>**Sort...**</u>

The **Sort** dialogue box is displayed.
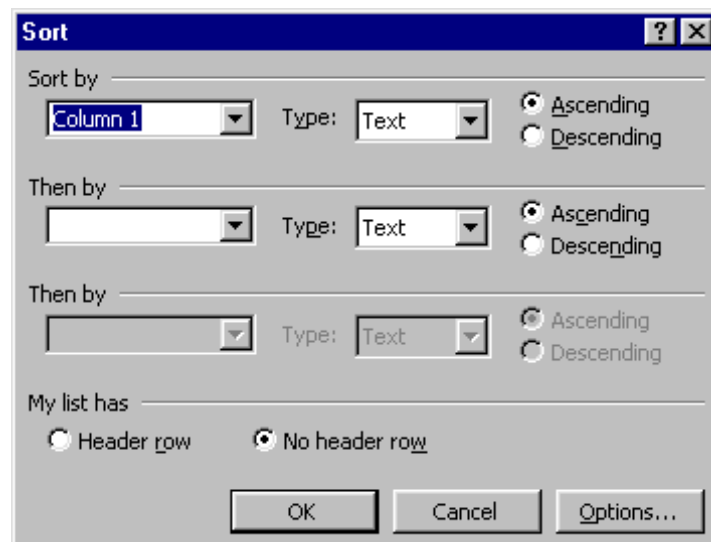
Sort dialogue box

- Select the **Header <u>r</u>ow** button if your table has column headers that should stay at the top

- From the **Type:** box, select **Text**, **Number** or **Date** and click <u>**A**</u>**scending** or <u>**D**</u>**escending** as appropriate

- From the **Then by** panel, define secondary criteria if required

- Click **OK**

> Tip   To sort a table quickly, position the insertion point in the column you want to sort by and on the **Tables and Borders** toolbar, click **Sort Ascending** ↓ or **Sort Descending** ↓. If you have previously set options in the **Sort** dialogue box, they will override the defaults.

Working in Outline View

When working with a large document, you will find **Outline** view allows you to:

♦ Get an overview of how the document is organised

♦ Move quickly through the document

♦ Promote and demote headings

♦ Rearrange headings

Outline view shows text formatted with the built-in heading styles (Heading 1 to 9) or text formatted with an outline level (Level 1 to Level 9). This text is indented so that it is easy to recognise each level in the document's structure.

An **Outline** toolbar provides easy access to all the outlining commands.

To switch to Outline view

• On the **horizontal** scroll bar, click the **Outline View** button

OR

• From the **View** menu, select **Outline**

The document is displayed in **Outline** view.

Text formatted with Heading 1 style shown flush with the left margin

Text formatted with Heading 2 style shown indented from the left margin

Normal style

Text formatted with Heading 3 style shown further indented from the left margin
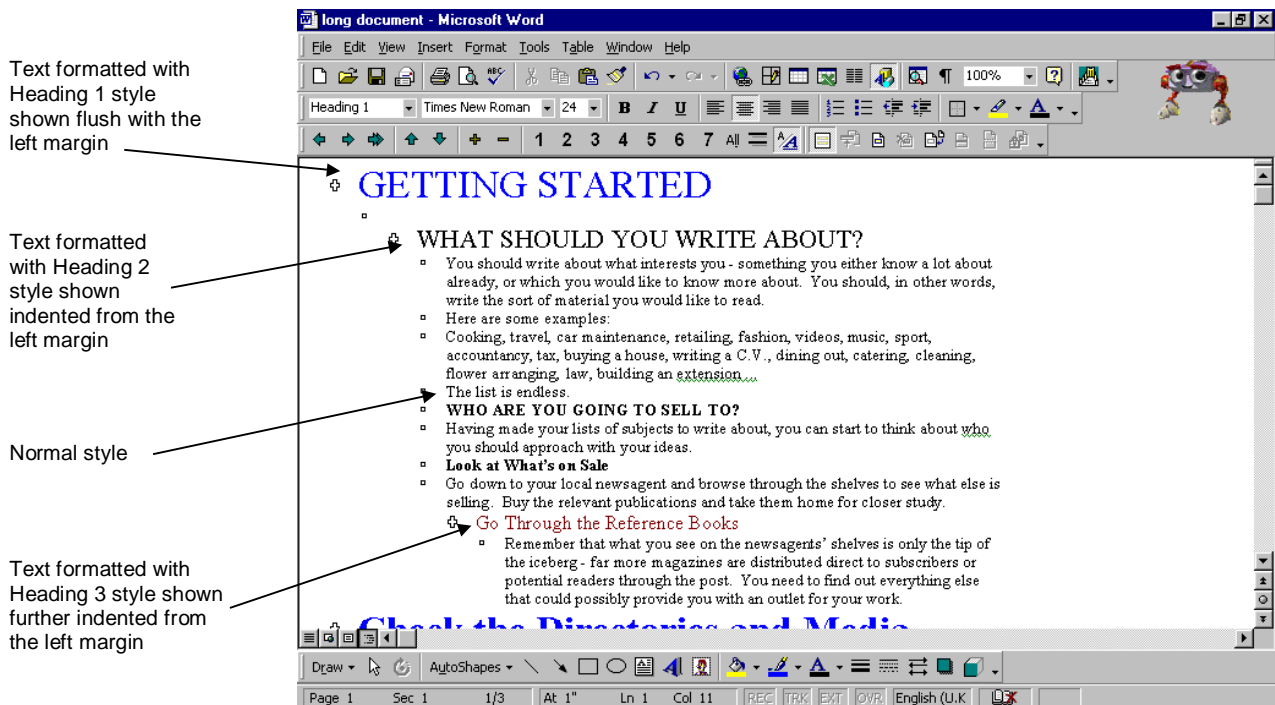
A document in Outline view

To show and hide different outline levels

In **Outline** view, you can collapse a document to show only the headings and body text you want using the **Outlining** toolbar. This makes it easier to grasp how a document is structured. The following table describes how to collapse and display headings.

Click	To
The numbered button for the lowest heading you want to display	Hide text below a specific heading level. For example, click **Show Heading 2** ⬚2⬚ to display heading levels 1 and 2 only.
Double-click ✣ next to the heading	Show/hide all subheadings and body text under a heading.
The heading text, and then click **Collapse** ⬚–⬚	Hide text under a heading, one level at a time.
The heading text, and then click **Expand** ⬚+⬚	Show collapsed text under a heading, one level at a time.
All ⬚All⬚	Show all text.
Show First Line Only ⬚≡⬚	Hide all body text except the first line. An ellipsis (...) after the first line indicates that additional lines of text are hidden.

To change the relative importance of headings

In **Outline** view, you can easily rearrange text that is formatted with the built-in heading styles.

- To promote a heading level to a higher level, select the heading and click **Promote** ⬚⬅⬚

- To demote a heading to a lower level, select the heading, then click **Demote** ⬚➡⬚

- To change a heading to body text, select it, then click **Demote to Body Text** ⬚➡⬚

To rearrange text by moving headings

- Select the heading you want to move

> **Note**   Collapse all text below the headings you are going to move. If you do not, subheadings and body text will **not** be moved along with the heading.

Part of a document in Outline view

- Click **Move Down** ⬇ to move the heading down

- Click **Move Up** ⬆ to move the heading up

To print an outline document

Once you have formatted headings with the built-in heading styles or outline levels, you can display as much of a document as you want in **Outline** view and then print just what is displayed.

- In **Outline** view, display the headings and body text you want to print

- On the **Standard** toolbar, click **Print** 🖨

Word prints only the displayed headings. If body text is displayed, Word prints all lines of the body text, even if only the first line is displayed.

Note	If manual page breaks are visible in **Outline** view, they will be reflected in the printed document. To remove the page breaks temporarily, save the document, and then delete the page breaks. After printing, close the document without saving changes.

Using Find and Replace

Word also provides several options for finding and replacing text. You can find and replace formatting, paragraph marks, page breaks and other such items.

When you use find and replace formatting you can look for character and paragraph formats, styles, language formats and highlighting. When you have located the formatting you are looking for you can replace the formatting alone or the formatted text or both.

When you use find and replace to search for items other than text or formatting. For example, special characters and document elements such as page breaks and tabs, you can choose the items from a list or enter codes directly.
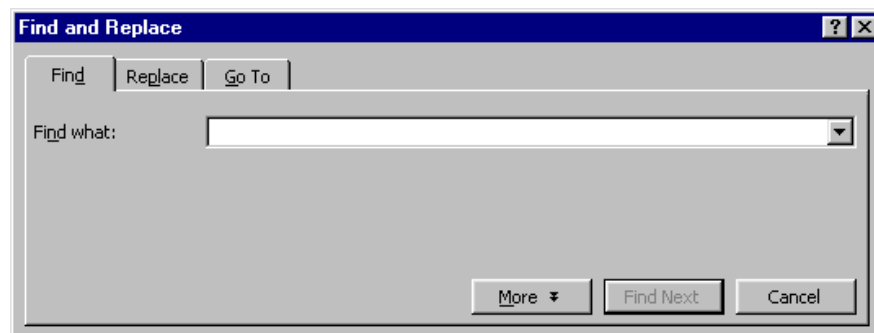
To find text, formatting and special characters

- On the **Browse Selector**, select **Find** 🔍

OR

- From the **Edit** menu, select **Find...** (*SpeedKey:* `Ctrl` + `F`)

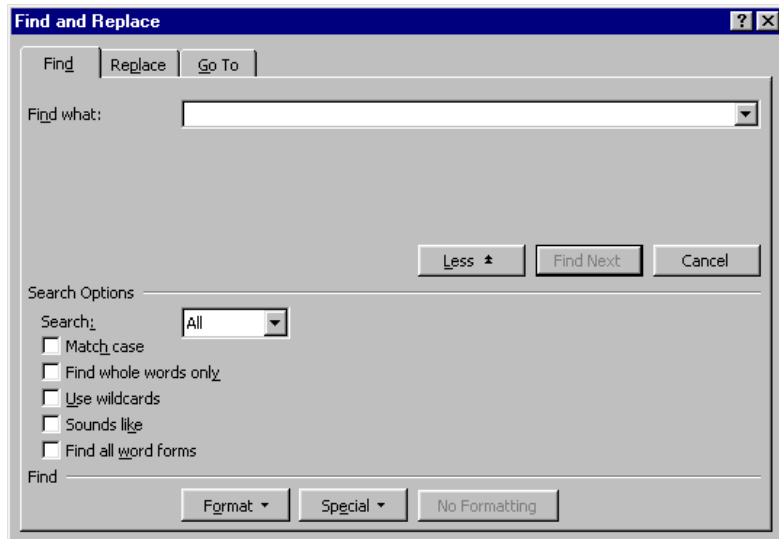The **Find and Replace** dialogue box is displayed.

Find and Replace dialogue box

- Enter the text to look for in the **Find what:** box

- Click the **Find Next** button to look for the next occurrence of the text

Note If you want to cancel a search in progress, press `Esc`.

- To find formatting or special characters, click the **More** button

- Click the **Special** button, and select the character you want to look for

- Click **Find Next**

- To find formatted text, click **Format**, and then select the formats you want to locate

- Click **Find Next**

Tip	If you want to find any instance of formatting in a document, clear the **Find what** box of any text.

| Note	If you want to clear the specified formatting, click **No Formatting**

- To hide the **Find and Replace** dialogue box, click the **Close** button ☒

Tip	The options you set in the **Find and Replace** dialogue box are kept when you close it. So the next time you open it, remember that formatting options might still be set. The options are cleared when you exit from Word.

To replace text, formatting and special characters

- From the **Edit** menu, select **Replace...** (*SpeedKey:* `Ctrl` + `H`)

The **Find and Replace** dialogue box is displayed.
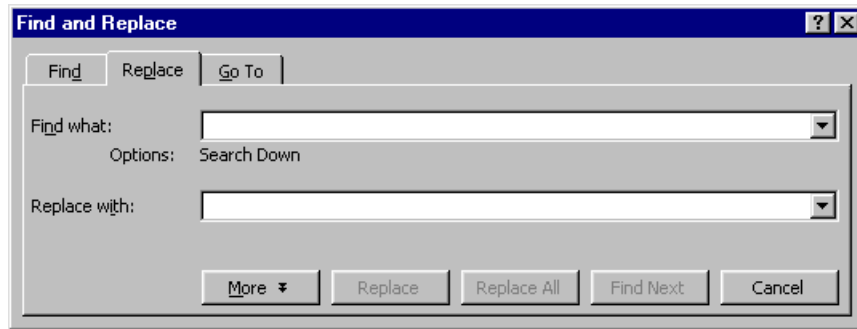
- Enter the text to find in the **Find what:** box and the text to replace it with in the **Replace with:** box

Click	To
Replace	Replace the item and find the next one.
Replace All	Replace all instances of the item.
Find Next	Leave the item as it is and find the next one.
Cancel	Close the **Find and Replace** dialogue box.

- To find formatting or special characters, click the **More** button
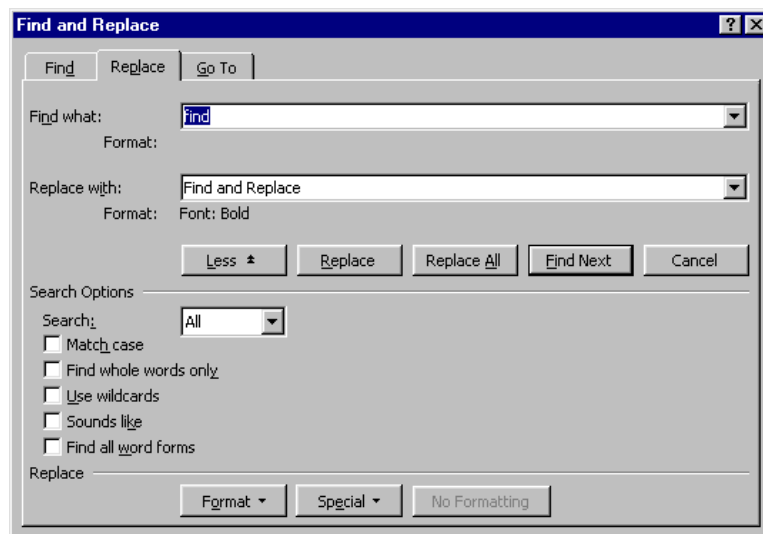
- With the cursor in the **Find what:** or **Replace with:** box as appropriate, click the **Special** button to select a special character to search for or replace existing text with

- With the cursor in the **Find what:** or **Replace with:** box as appropriate, click **Format**, and then select the formats you want to find and replace

- Click **Replace**, **Replace All** or **Find Next**

To find and replace different word forms

If you select the **Find all word forms** check box, Word will automatically find different grmamatical forms of the word you are looking for and also replace it with the grammatically correct form. For example, if you wanted to replace "can" with "will", Word could not only replace instances of "can", but also "could" and even "couldn't" with "would" and "wouldn't".

You can use this feature to locate:

♦ Different tenses of verbs

♦ Singular and plural forms of most nouns

♦ Different forms of adjectives (for example, simple, comparative and superlative - nice, nicer and nicest)

> Note   This feature works only if you are using the English version of Word, or if you have set English as an editing language.
>
> You are strongly advised not to use Replace All with this feature.

Creating a Table of Contents

To create a table of contents, you need to apply the heading styles to the text you want displayed in the table of contents. Having applied some heading styles, you choose how you want your table of contents to look.

When you update the table of contents, Word scans the document for text with the specified heading styles. This is put in the table of contents with the relevant **TOC** style and page number. For example, text with **Heading 1** style appears in **TOC 1** style in the table of contents, text with **Heading 2** style in **TOC 2** style, and so on.

> Tip   You can use the table of contents to move through a document by clicking a page number.

To create a table of contents from built-in heading styles

- Apply built-in heading styles (or your own custom outline styles) to the headings in your document

- Position the insertion point where you want the table of contents to go

- From the **In<u>s</u>ert** menu, select **In<u>d</u>ex and Tables...**

- Click the **Table of <u>C</u>ontents** tab
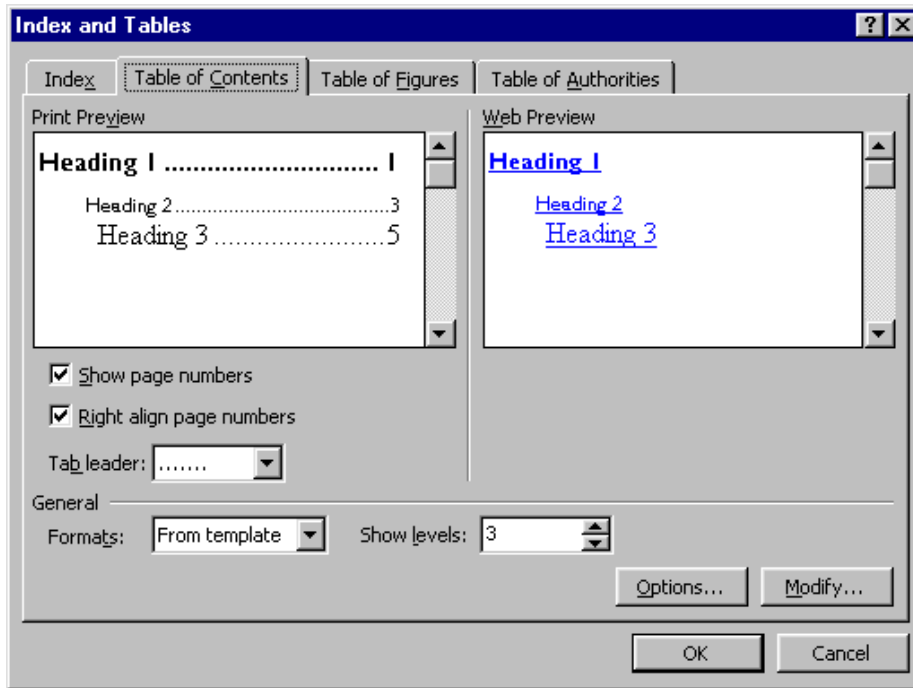
Index and Tables dialogue box

- In the **Show levels:** box, set the number of heading levels you want to include
- From the **Formats:** list box, select a design and layout for the table of contents

The results of the options you set are displayed in the **Print Preview** and **Web Preview** panels (When viewed in a web browser, the table of contents entries act as hyperlinks to the relevant heading).

- If you want to design your own table of contents style, in the **Formats:** list box select **From Template**

The table of contents will be generated from the **TOC** styles you define in the document template.

- If you want to create entries from styles other than the built-in heading styles, click **Options...**

The **Table of Contents Options** dialogue box is displayed.
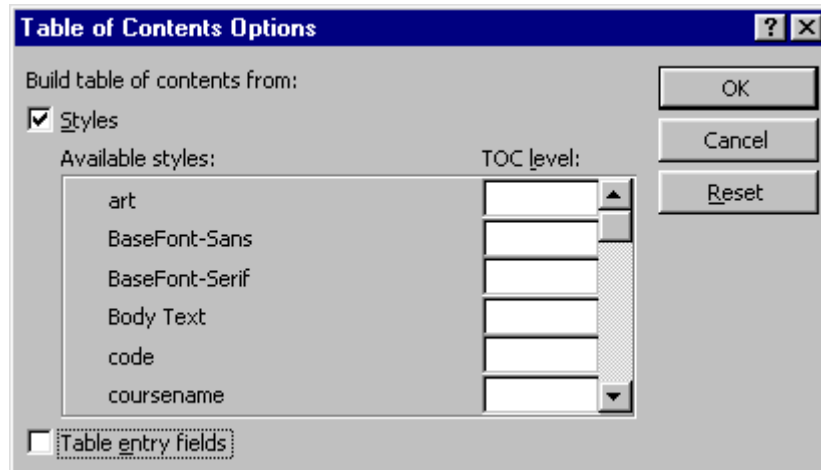
- Make sure the **<u>S</u>tyles** check box is ticked

The **Available styles:** list displays a list of the styles available in the document template. You can define an outline level for any of these styles. Text formatted with the style will then appear in your table of contents.

- In the **TOC <u>l</u>evel:** box, type an outline level (1-9) for the styles you want to include

- Click **OK**

- In the **Index and Tables** dialogue box, click **OK**

To create a custom design for a table of contents

- From the **<u>I</u>nsert** menu, select **In<u>d</u>ex and Tables...** then click the **Table of <u>C</u>ontents** tab if necessary

- Under **Forma<u>t</u>s:** click **From Template**, and then click **<u>M</u>odify...**
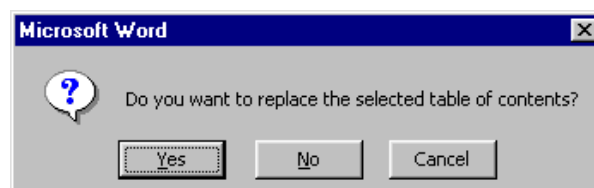
The **Style** dialogue box is displayed.
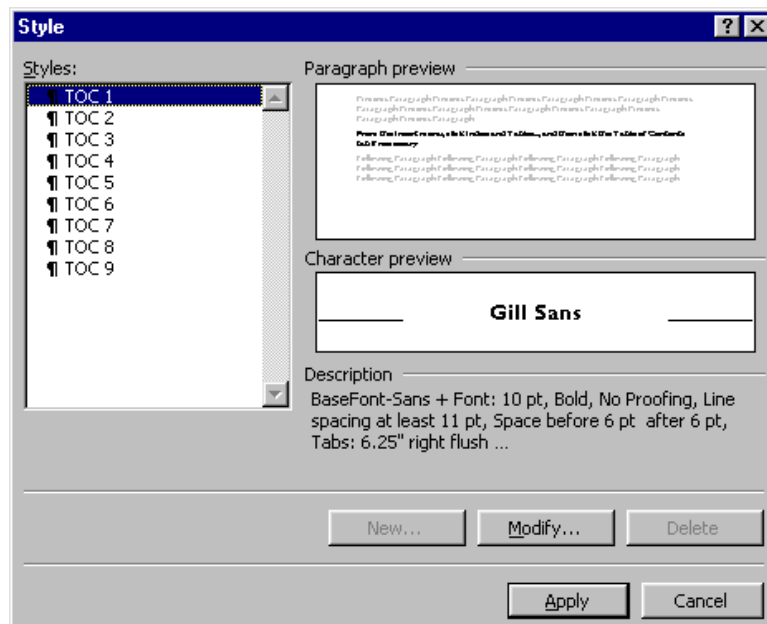
Style dialogue box

- Under **Styles:**, click the style you want to change, and then click **Modify...**

- Click **Format**, and then select the options you want

- Click **OK**

- Click **Apply**

- In the **Index and Tables** dialogue box, click **OK**

If there is already a table of contents in the document, you will be asked if you want to replace the existing one.

- Click **Yes** to modify the existing table of contents

- Click **No** to create a new table of contents

To update a table of contents

When you work on a long document, the chances are that it is going to be changed at some point. This means that not only do headings change but also the pages on which they appear. For this reason, you may need to update the table of contents.

- Right-click in the table of contents and from the shortcut menu, select **Update Field**

  OR

- Position the insertion point in the table of contents then press `F9`

The **Update Table of Contents** dialogue box is displayed.
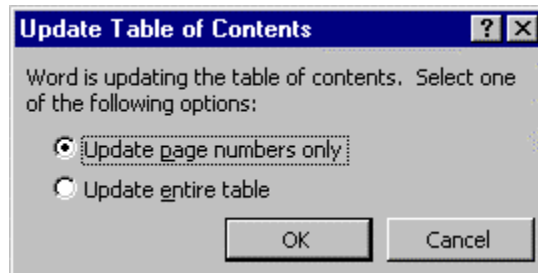
- If you want to update the page numbers and not the headings, click the **Update page numbers only** button

- If you want to update the headings *and* the page numbers, click the **Update entire table** button

- Click **OK**

> Note   Updating the entire table removes any special formatting you applied
> to the table of contents directly (using the **Formatting** toolbar or
> **Format** menu). The TOC styles are reset.

To delete a table of contents

- Double-click in selection border to the left of the table of contents to select it
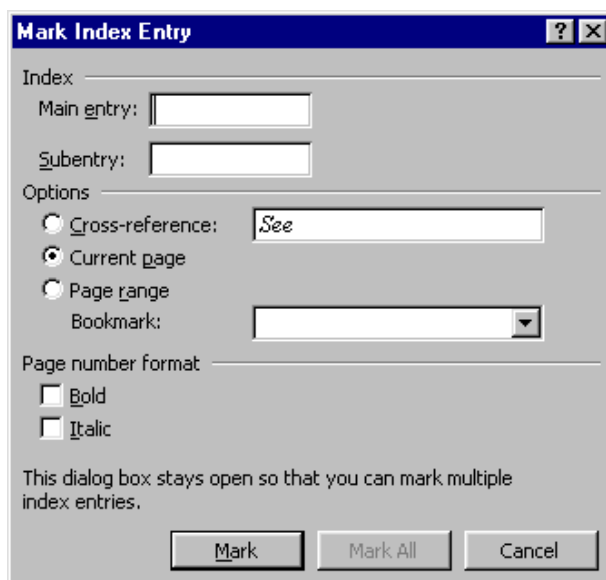
- Press `Delete`

Creating an Index

To create an index you must go through the document marking each word or words you want to include in the index with a special **{XE} field code**. When you have done this you insert the **{INDEX}** field code where you want the index to appear. When you update this field code Word finds text marked with the **{XE}** field code, sorts it into alphabetical order and adds page number references.

To mark the index entries

- Select the text you want to index

- From the **Insert** menu, select **Index and Tables...** then click the **Index** tab

- Click **Mark Entry...**

The **Mark Index Entry** dialogue box is displayed.

Mark Index Entry dialogue box

- In the **Main entry:** text box, type or edit the text

- To create a subentry, type the text in the **Subentry:** box

- To index just this occurrence of the text, click **Mark**

- To index all occurrences of the text in the document, click **Mark All**

Mark All indexes the first occurrence in each paragraph of text that exactly matches the uppercase and lowercase letters in the entry.

- To index more text, *keep the Mark Index Entry dialogue box open*, select the next word or phrase you want to include in the index, click in the **Mark Index Entry** dialogue box, and click **Mark** or **Mark All**

- Click **Close**

> **Tip** To open the **Mark Index Entry** dialogue box, press
> `Alt` + `Shift` + `X` .

To build the index

- Mark the index entries in your document

- Position the insertion point where you want to place the index

- From the **Insert** menu, select **Index and Tables...** and click the **Index** tab
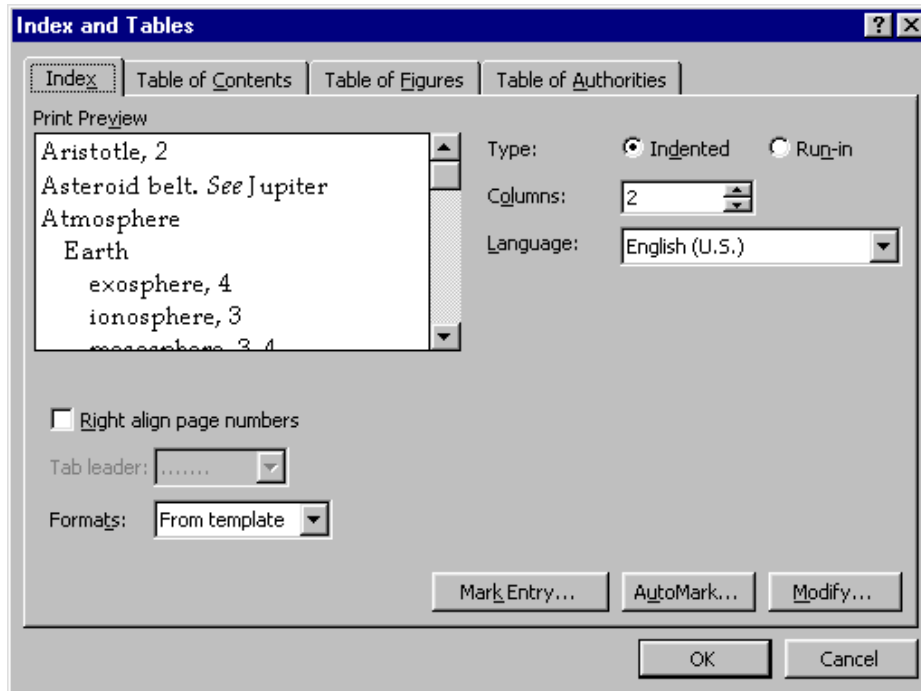
Index and Tables dialogue box

- From the **For<u>m</u>ats:** list box, select one of the designs

- Set any other options you want to apply

The results of the options you set are shown in the **Print Pre<u>v</u>iew** panel.

- Click **OK**

Change or delete index entries

The field code **{XE** "name of index entry"**}** is added around text marked as an index entry. Field codes are hidden text, which means that it does not normally print out and can be hidden on the screen display. To display hidden text, you use the **Show/Hide** button. To change index entries, you can modify the text in the index entry fields.

- If you do not see the **XE** fields, on the **Standard** toolbar, click **Show** ¶ (*SpeedKey:* `Ctrl` + `Shift` + `8`)

- To edit or format an index entry, change the text inside the quotation marks

- To delete an index entry, select the entire index entry field, including the brackets **{}**, and press `Delete`

Update an index after making changes

- Click in the index you want to update

- Press $\boxed{\text{F9}}$

Bookmarks and Cross-references

Bookmarks are a way of finding places in a document that you often need to return to. A bookmark can also be used to cross-reference other sections of the document. The reference could be to a page number, or to text formatted with a heading style.

To insert a bookmark

- Select the text you want to define as a bookmark

- From the **Insert** menu, select **Bookmark...**

The **Bookmark** dialogue box is displayed.

Bookmark dialogue box

- In the **Bookmark name:** box, type a name for the bookmark (this can include letters and numbers but not spaces)

- Click **Add**

To delete a bookmark

- On the **Insert** menu, click **Bookmark...**

- Select the name of the bookmark you want to delete

- Click **Delete**

To show bookmarks in a document

Bookmarks are another kind of hidden text. However they are not displayed using the **Show/Hide** button. You can display bookmarks using the **Options** dialogue box.

- On the **Tools** menu, click **Options...** then click the **View** tab

- In the **Show** panel, check the **Bookmarks** box

Any bookmarks in your document are displayed in square brackets ([...]). The brackets do not print out.
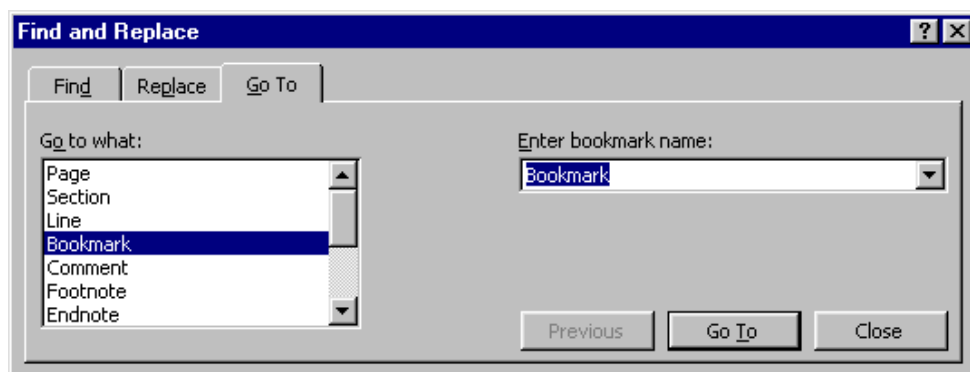
- To remove the brackets, uncheck the **Bookmarks** box

To go to a bookmark

- From the **Edit** menu, select **Go To...** (*SpeedKeys:* `Ctrl`+`G` **OR** `F5`)

The **Go To** dialogue box is displayed.

- From the **Go to what:** list box, select **Bookmark**

- In the **Enter bookmark name:** list box, select the bookmark you want to go to
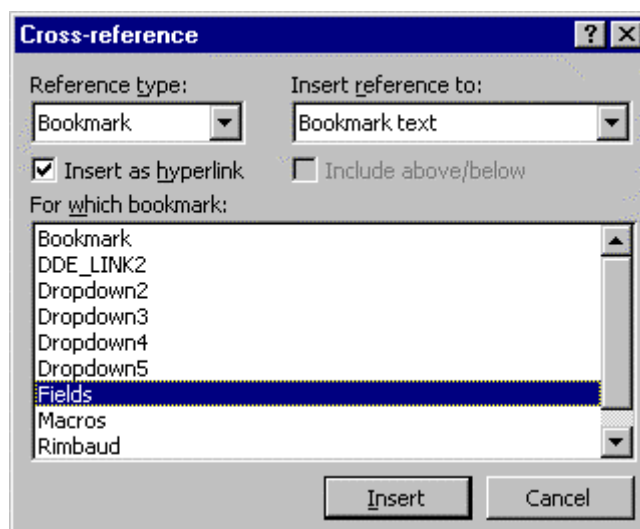

- Click **Go To**

- Click **Close**

To insert a reference to bookmarked text

- Position the insertion point where you want to put a cross-reference and type the introductory text to precede the reference (for example, "Refer to ")

- From the **Insert** menu, select **Cross-reference...**

The **Cross-reference** dialogue box is displayed.

- From the **Reference type:** list, select **Bookmark**

- In the **Insert reference to:** box, select **Bookmark text**

- In the **For which bookmark:** list box, select the bookmark you want to refer to

- Click **Insert**

- Click **Close**

Cross-reference dialogue box

To insert a reference to a page number

- Position the insertion point where you want to put a cross-reference and type the introductory text to precede the reference (for example, "Refer to ")

- From the **Insert** menu, select **Cross-reference...**

The **Cross-reference** dialogue box is displayed.

- From the **Reference type:** list, select **Bookmark**

- In the **Insert reference to:** box, select **Page number**

- From the **For which bookmark:** list, select the bookmark you want to refer to

- Click **Insert**

- Click **Close**

To insert a heading reference

- Position the insertion point where you want to put a cross-reference and type the introductory text to precede the reference (For example, "Refer to ")

- From the **Insert** menu, select **Cross-reference...** (long menu)

The **Cross-reference** dialogue box is displayed.

- In the **Reference type:** box, select **Heading**

- In the **For which heading:** box, select the heading you want to insert
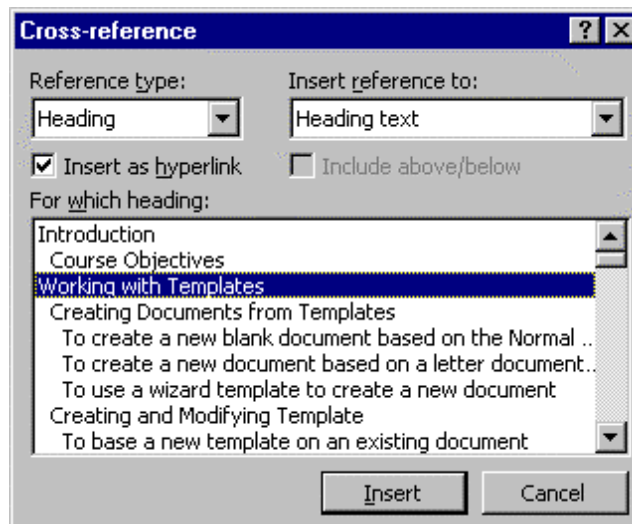
Cross-reference dialogue box

- Click **Insert**

- Click **Close**

Footnotes and Endnotes

Footnotes and endnotes provide a way of referencing text in a document. They are normally used to provide additional information about a topic in the text. A footnote or an endnote consists of two parts - the **note reference mark** and the **note text**.

The **note reference mark** is usually a superscripted number after the document text, but can be a symbol.

The **note text** is the text linked to the **note reference mark**. This text appears either at the end of the page on which the note reference mark is displayed (in the case of a footnote), or at the end of the document (in the case of an endnote). The note text is usually separated from the document text by a line.

To insert footnotes and endnotes

- Place the insertion point where you want the footnote reference mark to be displayed

- From the **Insert** menu, select **Footnote...**

The **Footnote and Endnote** dialogue box is displayed.
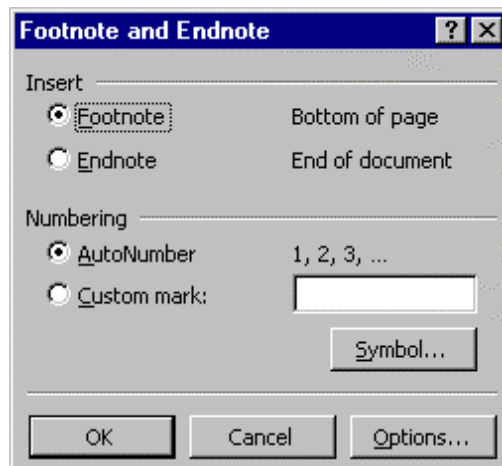
Footnote and Endnote dialogue box

- Select the **Footnote** or **Endnote** option

- Click **OK**

A footnote reference number is inserted in the document.

- Type the note in the footnote pane, and then click in the document to continue typing

> **Tip**   You can use symbols for footnotes instead of numbers by clicking the **Symbol...** button, or change the format of the numbering system by clicking the **Options...** button.

To view footnotes and endnotes

The footnote/endnote text is displayed in **Print Layout** view at the bottom of the page or the end of the document as appropriate. Alternatively, the note text can be displayed in a ScreenTip above the note reference mark.

- In **Normal** or **Print Layout** view, move the pointer over the note reference mark

The mouse pointer is displayed with a note icon next to it.

The note text is displayed in a **ScreenTip** above the mark.

> **Tip**   If ScreenTips do not display, on the **Tools** menu, select **Options...** and click the **View** tab. In the **Show** panel, make sure that the **ScreenTips** box is checked.

To edit footnotes and endnotes

- In **Normal** or **Print Layout** view, double-click the footnote reference mark

- Edit the footnote or endnote as required

Note	In Print Layout view the note is displayed as it will appear in the document. In **Normal** view, the note is displayed in a special **Footnotes** pane.

To move or copy footnotes and endnotes

To move or copy a foot/endnote, you select the note reference mark. Word will automatically renumber notes to reflect any changes you make.

- Select the reference mark of the note you want to move or copy

- To move the note reference mark, drag it to the new location

- To copy the reference mark, hold down `Ctrl`, and then drag the mark to the new location

Word renumbers the notes in the new order.

To delete footnotes and endnotes

- Select the footnote reference mark

- Press `Delete`

Creating a Document Summary

The **AutoSummarize** feature scans your document to find the most important sentences, which it uses to create a summary of the document's main points.

AutoSummarize only works well on documents that are highly organised, scientific papers for example. In other kinds of document AutoSummarize may give unpredictable results, and should be checked carefully against the original.

To create a summary

- From the **Tools** menu, click **AutoSummarize...**
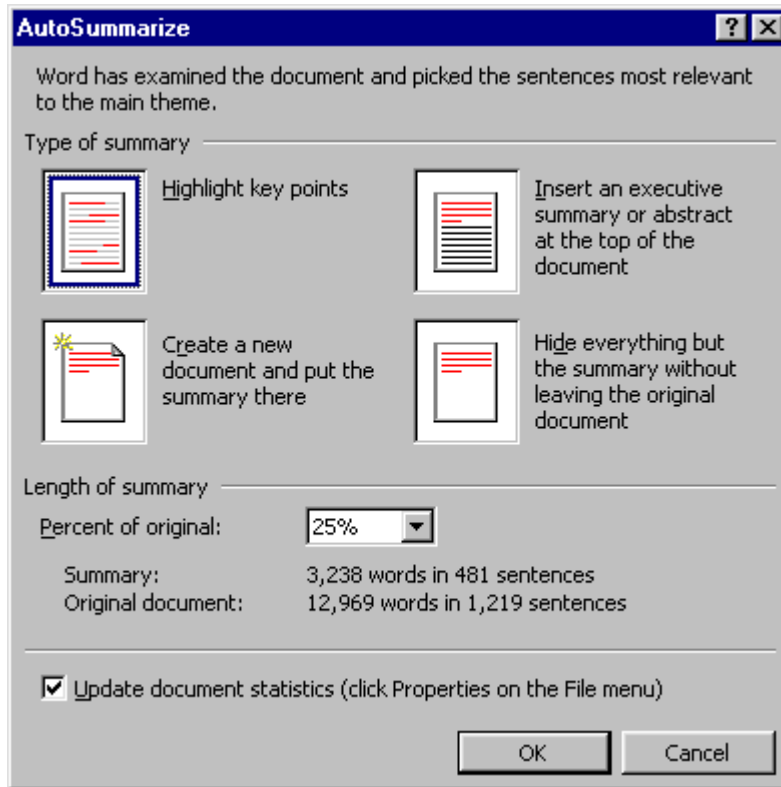
- Under **Type of summary**, select the way you want to display the summary

Four different types of summary are available, as shown in the table below.

Select	To
Highlight key points	Highlight the important sentences in your document in yellow and leaves the rest of the text in grey
Insert an executive summary	Create an **abstract** at the top of the document
Create a new document	Copy the summary into a new window
Hide everything but the summary	Display the summary and not the original text

- In the **Percent of original:** list box, select the level of detail to include in the summary or type your own value

- Click **OK**

Tip	Review the summary to check that it is an accurate reflection of the document. If it is not, use **Undo** to delete the summary, and then repeat the **AutoSummarize** procedure, this time using a higher percentage of the original document.

Exercises

Sorting a Table

- Open the document **LEARN IT**

- Sort the table so that you can see more easily which courses **ABC Mail Order** are taking

LEARN IT training can only run one course on a particular application on any one day.

- Sort the table by date in ascending order to find out if there are any double bookings

- Why does **MSP01** appear at the top of the table?

- Correct the problem and sort the table again

- Reschedule the **Zodiac Cards Word Introduction** training course for 13 September 1999

- Re-sort the table by **Group** and **Date** to check that Zodiac Cards are not double booked

- Use the **Sort Ascending** button to sort the table in order of **Course Code**

- Close the document without saving your changes

Exercises

Working with Long Documents

- Open the document **OUTLINE**

- In **Outline** view, rearrange the document so that the headings and subheadings are in the
  following order (You may need to promote/demote and move some headings)

```
⊕  MAINLAND SPAIN
        ⊕   Estarrit
        ⊕   Sitges
        ⊕   Nerja
⊕  MAJORCA
        ⊕   Puerto de Soller
        ⊕   Puerto de Alcudia
        ⊕   Porto Cristo
⊕  IBIZA/FORMENTERA
        ⊕   Es Canas
        ⊕   Santa Eulalia
⊕  CORFU
        ⊕   Acharavi
        ⊕   Roda
        ⊕   Sidari
⊕  CRETE
        ⊕   Rethymnon
        ⊕   Aghios Nikolaos
⊕  RHODES
        ⊕   Ixia
        ⊕   Rhodes Town
⊕  ITALY
        ⊕   Sorrento
        ⊕   Amalfi
        ⊕   Minori
⊕  SICILY AND SARDINIA
        ⊕   Taormina
        ⊕   Alghero
___
```

- Find emboldened text (no text) and replace with bold, italics and colour font of your
  choice

- Find paragraph markers

- Create a new page at the beginning of the document and create a table of contents for
  heading levels 1 and 2

- Create a new page at the end of the document, and generate an index that looks like the
  one below

- Create bookmarks for the first occurrence (not counting the table of contents) of **Spain**, **Italy** and **Greece** in the text

- Show and then remove the bookmark(s)

- Edit the footnote on page **3** so that it reads "A third course will be open at the end of the summer season."

- Insert a footnote of your own

- Print a summary of the document created with the **AutoSummarize** feature

- Save and close the document

Mail Merge

Objectives

Generally	To produce a mailshot quickly by merging a standard letter with a data list containing names and addresses.
Specifically	On completion of this section, you will be able to:
•	Understand the concept of merging
•	Create a **Main** document
•	Create a **Data** document
•	**Merge** and **print** the documents to a **new document**
•	**Work** with the **data source**
•	Use **external** data
•	**Sort** and **select** records
•	**Create** labels

Mail merging is the process of combining information from two sources to make a new document. It is normally used to produce a form letters to several recipients but can also be used to create documents such as a directory or catalogue.

Two Word documents are used when creating a mail merge.

♦ A **Data** document, which contains variable information such as names, addresses, or other information (called **records**)

♦ A **Main** document, containing standard text and merge fields, which identify where the variable information should be placed

A Data document can be merged with many different Main documents. For example, the Data document could also be used to address envelopes or print address labels. The Data document is always in the form of a table.

The Main document is usually in the form of a standard letter, but can be laid out in any appropriate format. The Main document contains **merge fields**. The merge fields represent data fields from the Data document. When the merge takes place, the fields are replaced with the actual data (names, addresses and so on).

There are three basic steps in creating a mail merge.

♦ Create the Main document

♦ Create the Data document

♦ Merge the Data document with the Main document
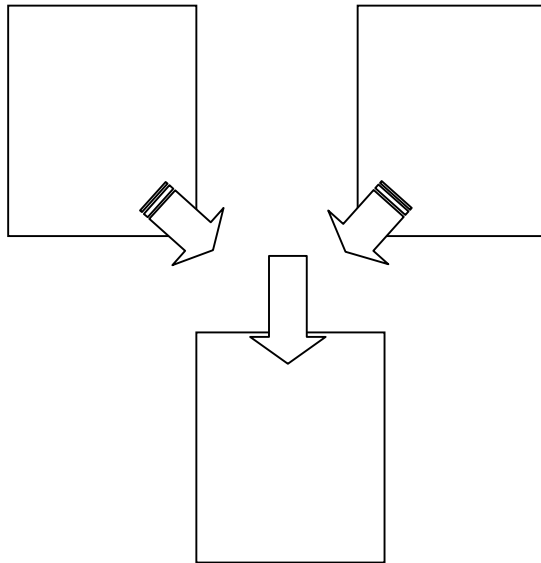
Word's merge feature goes beyond merging a standard letter with different names and addresses. You can work with the data source to add and remove records. You can select the records you want to merge as well as sort them into alphabetical order.

If you are careful when setting up the data document you will be able to use your records to group certain people together. For example, you might want to mail those who live in a certain area or share the same postcode.

Data can be used from various sources including a Word table, Outlook contact list, Excel worksheet, Access database or an ASCII text file.

Creating a Main Document

A **Main** document contains the standard text and fields that position variable information.

- From the **Tools** menu, select **Mail Merge...**

The **Mail Merge Helper** dialogue box is displayed.
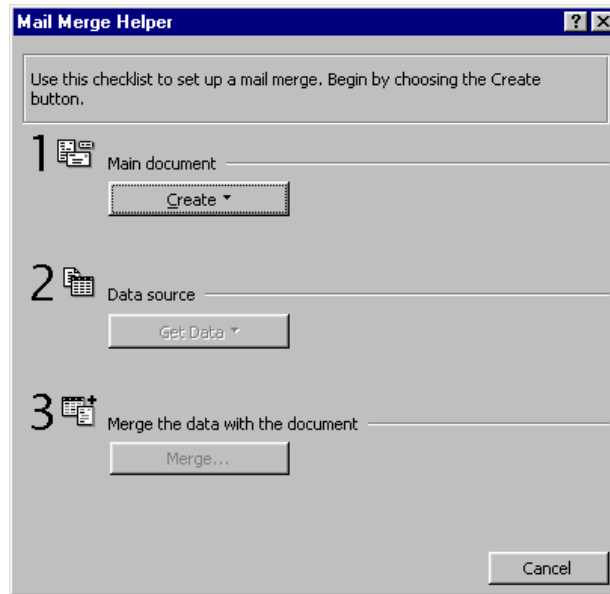
Mail Merge Helper dialogue box

- Click the **Create** button

The **Create** drop-down list is displayed.
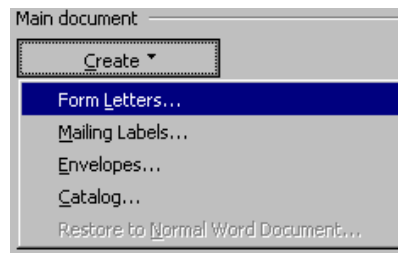
Main Document menu

- Select **Form Letters...**

The merge document message box is displayed.
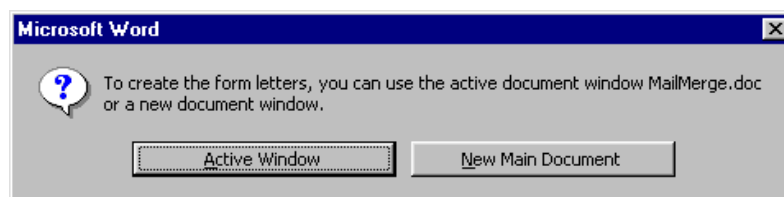
Merge document message box

- Select **Active Window** if you have started a new document or are already working in the document to be mail merged

OR

- Select **New Main document** if you are working in a document which is not the one to be mail merged

The Main document for the mail merge has now been identified. Next, identify the Data document.

Creating a Data Document

A mail merge **Data** document must always be a table of at least two rows. The first row must contain the **Header** record, which is a row of "field names" that identify the kind of information held in each column of the table.

The rest of the rows contain the **Data** records, the information that is merged into the Main document. Each row of the table is a separate record.

To create the data source

After identifying the Main document you are returned to the Mail Merge Helper.

- Click **Get Data**

The **Get Data** drop-down list is displayed.
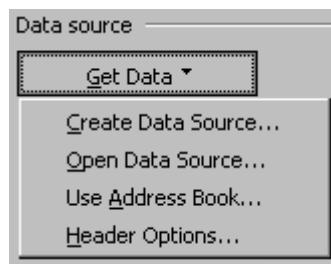
Data source menu

- Click **Create Data Source...**

The **Create Data Source** dialogue box is displayed.
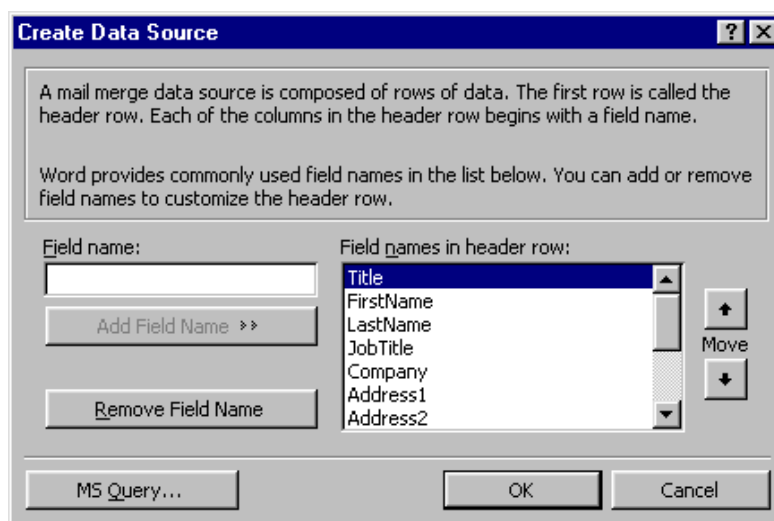
Create Data Source dialogue box

The **Create Data Source** dialogue box contains a list of commonly used field names. Field names not required can be deleted from the list and new field names added.
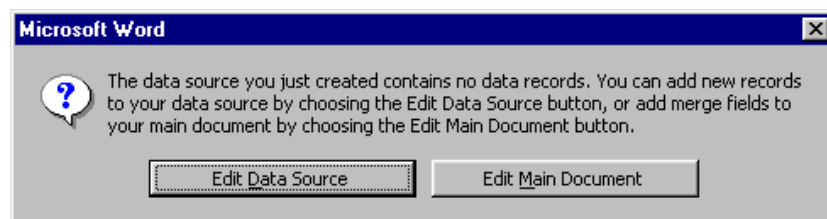
> Note   Field names cannot start with numbers or contain spaces.

- **Add...** or **Remove...** field names as needed

- Use the up and down **Move** buttons to put the field names into correct sequence for data entry

- Click **OK**

The **Save As** dialogue box is displayed.

- Enter a file name for the Data document

- Click **OK**

The **Edit** document message box is displayed.

Edit document message box

The Data document has now been created containing only the field names (Header Row). Next, edit the data source and add information to the Data document.

- Select **Edit Data Source** to add records to the Data document

The **Data Form** dialogue box is displayed.

**To add, edit, and delete records**

- Click **Add New** to open a blank form for a new record

The new record is added to the end of the list.

- Type the information in each field to edit and press $\boxed{\textbf{Enter}}$

- Click **Restore** to cancel any changes to the current record

- Click **Delete** to remove the current record from the list

- Click **OK** when you have completed editing the records

To move around the data form

- Press $\boxed{\textbf{Enter}}$ or $\boxed{\textbf{Tab}}$ to move forward between fields

- Press $\boxed{\textbf{Shift}}$ + $\boxed{\textbf{Tab}}$ to move backward between fields

- Press $\boxed{\textbf{Enter}}$ on the last field to complete the record and start a new record

- Click the record selector buttons to browse the records in the table

Record selector buttons
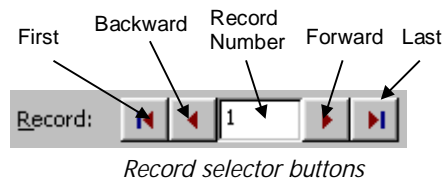
# Completing the Main Document

On leaving the data file you are returned to the **Main** document with the **Mail Merge** toolbar displayed.
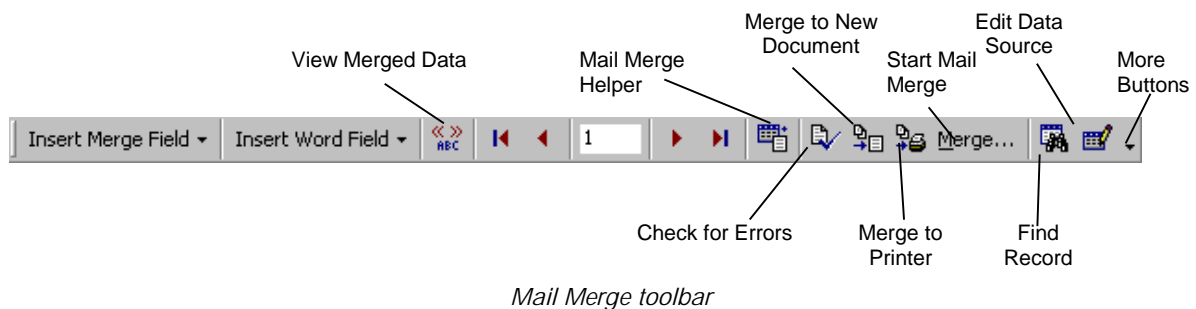
Mail Merge toolbar

- Enter the text to be printed on every page of the mail merge; for example the body text of a letter

- Position the **insertion point** where the first item of variable information (field) is to be inserted

- On the **Mail Merge** toolbar, click **Insert Merge Field**

The field name list from the Data document is displayed.
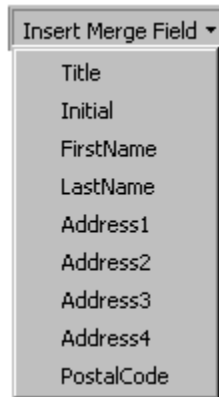
Data Document field list

- Select a field name

The field is inserted inside chevrons, for example **<<Title>>**. Merge fields can be inserted in any order, and the same field can be inserted any number of times.

- Press ⊡Enter⊡ to move to the next line if the fields are to be on separate lines, as in an address for example

- Repeat for each field name required in this document

- Save the Main document

> **Tip**   Text may move up or down the document depending on the length of the data that is being inserted into the field name space. On the **Mail Merge** toolbar, click **View Merged Data** 〈ABC〉 to see the actual data in place of the field names.

```
«Title» «Initial» «LastName»          Mr R Taylor
«Address1»                            Talim House
«Address2»                            42 Broadway
«Address3»                            Maidenhead
«Address4»                            SL6 1LU
«PostalCode»




Dear «FirstName»,                     Dear Rob,

I am writing to remind you of the occasion    I am writing to remind you of the occasion
```

Example letter showing fields   *Same example letter showing data*

> **Note** Where there is no data in a field the space reserved for the data is closed up. If the field is the only entry on the line, for example, in an address, the line is closed up.

Printing Mail Merge Documents

Mail merge documents can be printed directly to the printer, or printed to a new document. Printing can be for every record in the database, the current record displayed on-screen only, or by various merge print selection criteria.

When printing to a document the new document is opened on the screen and contains all of the text from the Main document plus the selected information from each merged record in the Data document. One or more pages are created for each record selected from the Data document. The information in the new document is created as if it had been typed manually.

The new document can be edited before printing; for example, where non-standard text needs to be added. It can also be used for printing selective pages where there are no standard selection criteria. The new document can be saved under its own file name for future use.

To merge all records to a new document

The first time you print, merge to a new document. Check that data is being printed in the correct position, with the correct formatting. Check that the data being inserted in the fields does not cause paragraphs to word wrap unacceptably, or force the text onto an additional page.

- On the **Mail Merge** toolbar, click **Merge to New Document**
  (*SpeedKey:* `Alt` + `Shift` + `N`)

The new document is opened ready for editing, printing or saving.

To merge all records to the printer

Use this option only when you want to print every record in the Data document and are sure the mail merge will print correctly.

- On the **Mail Merge** toolbar, click **Merge to Printer** 🖳 (*SpeedKey:* `Alt` + `Shift` + `M`)

To merge only a single record to the printer

Use this option when you only want to print a single record from the Data document.

- Select the record to print with the **Record Selector** buttons |◄ ◄ [1] ► ►|, until the correct record is displayed, or use the **Find** button 🔍 to search for it

- On the **Standard** toolbar, click **Print** 🖨 (*SpeedKey:* `Ctrl` + `P`)

Editing the Data Document

A **Data Form** is easier to work with than a table, particularly if there are many fields. The field names are listed down the left side of the Data Form, with the fields beside them. The fields scroll across if the data entered is longer than the box.
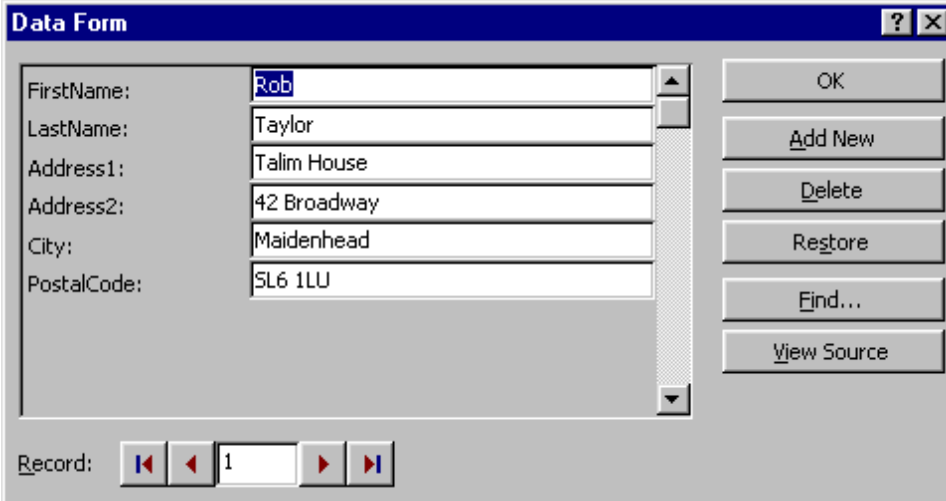
Alternatively, open the Data document in the normal way and edit the table directly.

> **Note** Whenever you open the Main document, the Data document is automatically attached and the **Mail Merge** toolbar is displayed.

To open the data form

- On the **Mail Merge** toolbar, click **Edit Data Source** 📝 (*SpeedKey:* `Alt` + `Shift` + `E`)

The **Data Form** dialogue box is displayed.

- Make the required changes

- Click **OK**

The main document is displayed.

To find a record

If your data source is very large you may find it difficult to find a particular record quickly.

- Open the **Data Form**

- Click **Find...**

The **Find in Field** dialogue box is displayed.

- In the **Find what:** box, type the text you want to find

- From the **In Field:** list box, select the field containing the text you want to locate

- Click **Find First**

The next occurrence of that record is found.

- Click **Close**

Viewing the data source in a table

You can work with the data source in a separate window with each record in a table.

- Open the **Data Form** and click **View Source**

The **data source** is opened and the **Database** toolbar is displayed.

Database toolbar

| Click	To Do This
Data Form	Return to the Data Form dialogue box
Manage Fields	Add, remove or rename field names in the header row
Add New Record	Insert a blank row
Delete Record	Delete the row the cursor is in
Sort Ascending	Sort a column in ascending order
Sort Descending	Sort a column in descending order
Insert a Database	Insert any existing database
Update Fields	Update fields in the table
Find Record	Find a record
Mail Merge Main Document	Return to the main document

Using External Data

The data for a mail merge can come from an external source such as an existing database or other specified data source. When data is brought into Word it is inserted as a table in the active document.

> **Note** Dates imported from other applications are treated as text and are not handled as date values.

To use data from an external database as a data source

- On the **Database** toolbar, click **Insert Database**

The **Database** dialogue box is displayed.
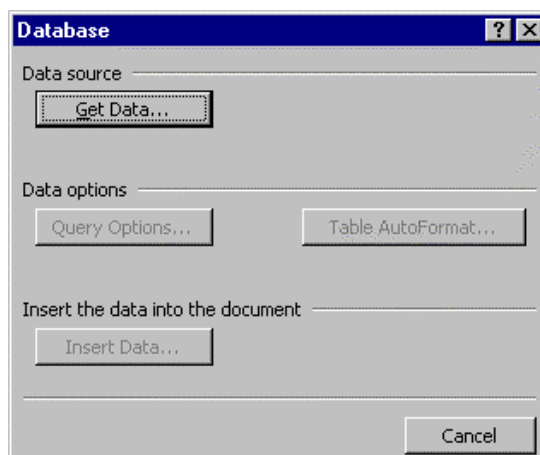
The **Insert Database** dialogue box options are as follows.

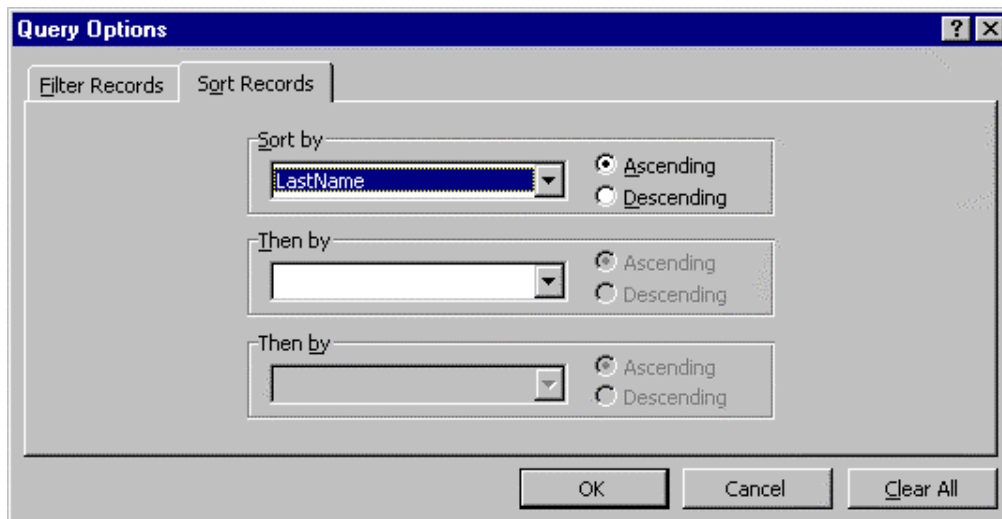| Click	To
Get Data...	Select the file containing the new data source.
Query Options...	Set options for selecting and sorting records in a data source. Word includes only information from the resulting table of data.
Table AutoFormat...	Automatically apply formats, including predefined borders and shading, to a table (Automatically resizes a table).
Insert Data...	Specify the range of selected records or rows you want to include in the table of data.

Sorting and Selecting Records

It is useful to be able to sort your mail merge records to look for duplicates, errors or records of a particular type.

To sort your records

- Open the main document

- On the **Mail Merge** toolbar, click **Mail Merge Helper**

- Click **Query Options...**

The **Query Options** dialogue box is displayed.

- Click the **Sort Records** tab

- In the **Sort by** list select the field you want to sort by

- Choose **Ascending** or **Descending**

- In the **Then by,** list select the field you want to sort by in the event of a tie at the first level

- Click **OK**

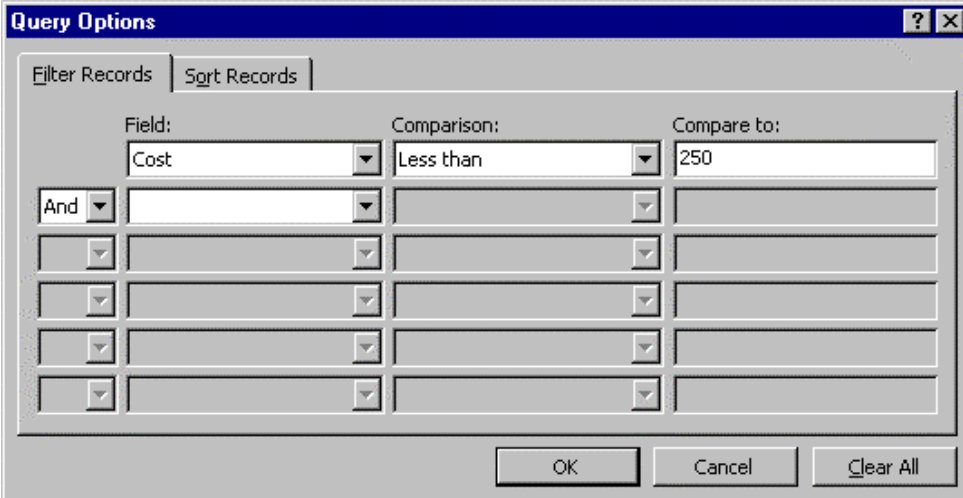The **Mail Merge Helper** dialogue box is displayed.

- Close the **Mail Merge Helper** dialogue box and view the data source to see your records sorted

To select a subset of records

Once you have set up a data source you can use it as often as required. On some occasions though, you may wish to mail only a selected number of recipients, not the total list. For this reason, you can filter your records.

- Open the main document

- On the **Mail Merge** toolbar, click **Mail Merge Helper** 📇

- Click **Query Options...**

The **Query Options** dialogue box is displayed.

- Click the **Filter Records** tab

- From the **Field:** drop-down list, select the required field

- From the **Comparison:** list box, choose an operator to sort by

- In the **Compare to:** box, type your criteria

- Click **OK**

The **Mail Merge Helper** dialogue box is displayed.
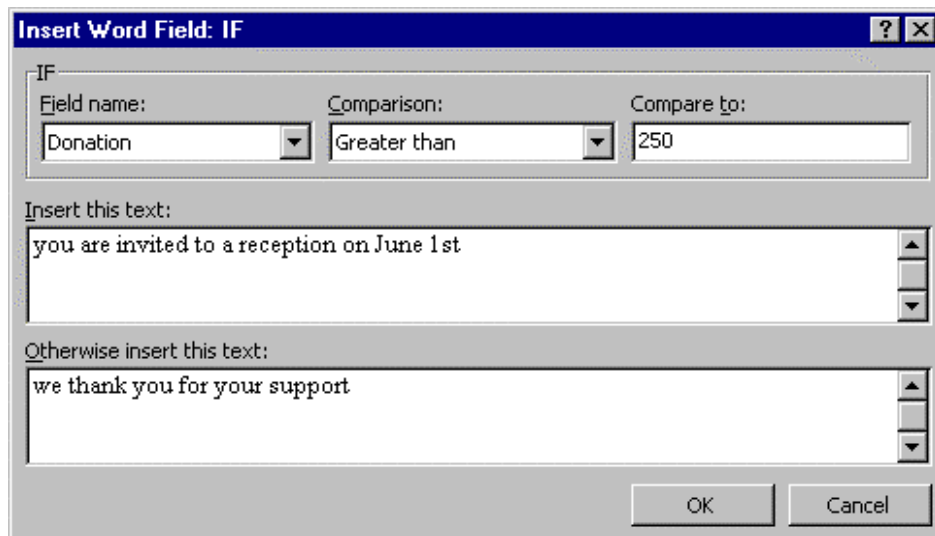
- Complete the merge

To insert conditional merge fields

You may want certain text to print only when specified criteria are met. For example:

```
As you have kindly donated {IF donation is greater than
£250 THEN 'you are invited to the reception on June 1st.'
ELSE 'we thank you for your support.'}
```

- Open the main document

- Position the insertion point where you want to insert the criteria

- On the **Mail Merge** toolbar, click **Insert Word Field** | Insert Word Field ▾ |

- Select the **<u>If...Then...Else...</u>** command

The **Insert Word Field** dialogue box is displayed.

- From the **<u>Field name:</u>** list box, select the required field

- From the **<u>C</u>omparison:** list box, select the required operator

- In the **Compare <u>to:</u>** list box, type the required value

- In the **<u>I</u>nsert this text:** box, type the statement you want to appear if the condition is met

- In the **Otherwise insert this text:** box, type the statement you want to appear if the condition is not met

- Click **OK**

The field is inserted into the main document.

- Complete the mail merge in the normal way

Creating Labels

You can use the names and addresses in the data source to create labels.

- Open the main document

- On the **Mail Merge** toolbar, click **Mail Merge Helper** 🖳

Step 1 - **creating the main document**

- In the **Main Document** panel, click the **Create** button

- Select **Mailing Labels...**

- Click the **New Main Document...**button

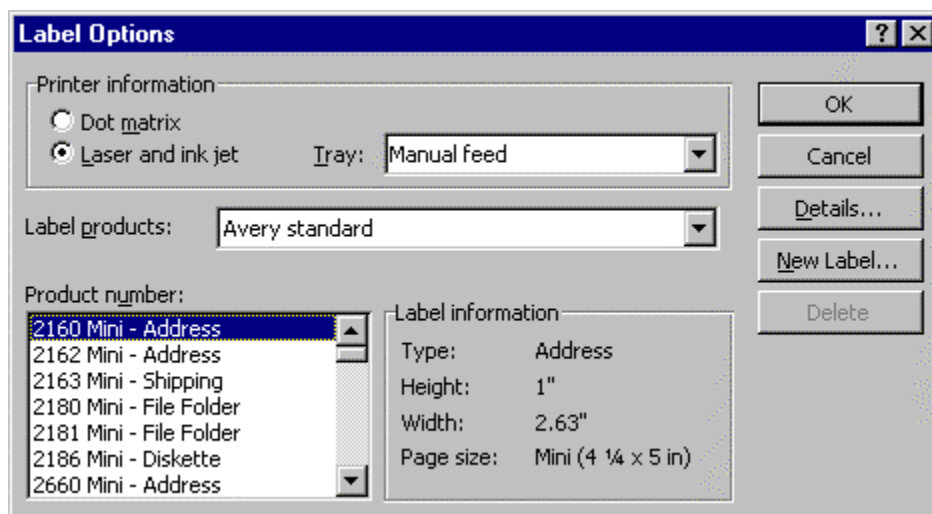**Step 2** - **getting the data and choosing the label type**

- Click the **Get Data** button

- Select **Open Data** Source...

The **Open Data Source** dialogue box is displayed.

- Select the data file and click **Open**

- Click the **Set up Main Document** button

The **Label Options** dialogue box is displayed.

- From the **Label products:** list box, select the required format

- From the **Product number** list box, select the required brand of label

- Click **OK**

The **Create Labels** dialogue box is displayed.
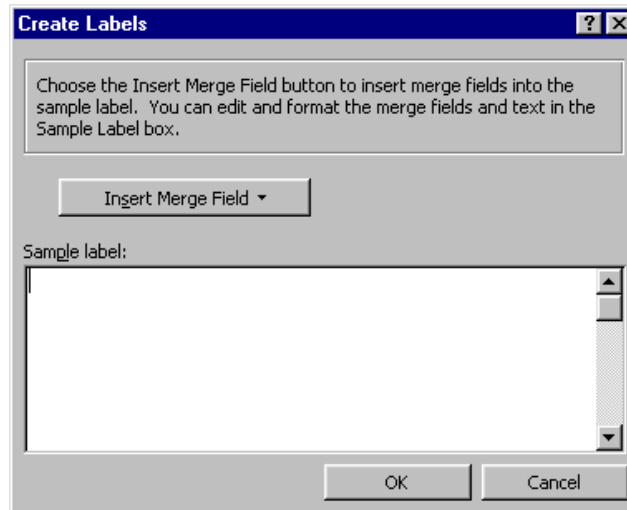
- Add the appropriate merge fields using the **Insert Merge Field** button

- Click **OK**

The **Mail Merge Helper** dialogue box is displayed.

Step 3 - **merging the labels**

- Click the **Merge** button

Set a query option if required.

- Click the **Merge** button

Your labels appear in a window **Labels1**.

Exercises

Mail Merge

- Create the following data document and call it **DATA**

Name	Grant Mitchell	Max Farnham	Fred Bloggs
Title	Landlord		Managing Director
CoName	The Queen Vic		Bloggs & Co
Road	Albert Square	Brookside Close	Bloggs Street
Town	Walford	Liverpool	Liverpool
County	London	Merseyside	Merseyside
Postcode	E1	MR3 SY9	MR5 3TH
Salutation	Grant	Max	Mr Bloggs
Close	sincerely	sincerely	faithfully

- Create the following main document and save it as **PRODUCTS**

> 5th February 2000
>
> <<Name>>
> <<Title>>
> <<CoName>>
> <<Road>>
> <<Town>>
> <<County>>
> <<Postcode>>
>
>
> Dear <<Salutation>>
>
> I am writing to inform you that our new product range has now been
> launched. If you would like more information, please contact Mr Marketing
> on 0181 111 2222.
>
> Yours <<Close>>
>
>
>
> **Sally Sales**

- Merge the files to a new document
- Merge this data document

NAME	DEPARTMENT	COURSE	DATE
Julie	Sales	Assertiveness Training	15th October
Henry	Marketing	Effective Sales Techniques	12th December
Barry	Personnel	Management Skills	11th November

...with this main document

MEMORANDUM

TO: <<NAME>>   **DEPARTMENT:**   <<DEPARTMENT>>

FROM: Jill   **DATE:**   12th September

You are invited to attend the <<**COURSE**> course on <<**DATE**>. Please let me know as soon as possible whether or not you are able to attend.

Exercises

Advanced Mail Merge

- Open the document called **HOLIDAYMAIN**

- Merge with **HOLIDAYDATA**

- Check for any errors and if necessary fix them and merge once again

- Edit the data source so that the Dr Paul Black and Miss Katherine Gerald records are as follows

Dr	Paul	Black	Dove Cottage 65 Mumbles Road Swansea	West Glamorgan	WE23 D23	460	Corfu	7	12/4/1999	299
Ms	Katherine	Gerald	102 Blythe Road	London	W14 OMD	151	Malta	14	23/8/1999	450

- Sort the records into alphabetical order by the **SName** field

- Break any ties by sorting alphabetically on the **FName** field

- Merge the two documents once again

- Select only the records for which the cost field is over £300

- Merge the two documents once again

- Edit the main document by inserting a new IF...THEN...ELSE field

  ```
  If the holiday costs over £300 or more a 25% deposit
  is now due.

  If the holiday costs less than £300 a 15% deposit is
  now due.
  ```

- Merge the documents once again

- Create a new main document so that you can produce labels from **HOLIDAYDATA**