Microsoft Application Series

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Contents

Using the Mail Merge Wizard

When used properly, mail merge can be one of the best time-saving tools in Word. Unfortunately, it's also the most misunderstood. Many people get the look of a small mammal caught in the path of a large vehicle when mail merge is mentioned; we're here to change that!

Mail Merge Basics

Mail merge is when you take a document (such as an e-mail message, a letter, or a label) and merge it with a data source (such as a list of addresses). The finished result is customized to each entry in the data source.

For example, let's say you want to send a Christmas newsletter summing up the events of the year to all the members of your family. You would like to have it personalized for everyone, but you have 50 people on your mailing list! You can use mail merge to create the letter and then merge it with your address list so that each letter is addressed to the recipient.

Here's a list of terms you'll hear in relation to a mail merge:

Merge fields	These are the places where Word will insert your data. For example, the <<Address Block>> merge field marks where each person's address will go.
Data Source	This is the file that contains the personalized information, such as a list of addresses. Data sources can be existing files (such as Access databases), pulled from an application (such as your Outlook contacts), or created during the mail merge.
Record	A record is one set of data in your data source. For example, a record from your Outlook contacts could contain the person's first and last name, mailing address, and e-mail address.

The easiest way to perform a mail merge is by using the Mail Merge wizard, so we're going to devote this whole section to the various options in the wizard.

Starting the Mail Merge Wizard

1. Create your letter ready for mailing, and save.
2. Go to Mailings/Start Mail Merge group and click the Start Mail Merge button.
3. Select Step by Step Mail Merge Wizard from the list provided.
   The Mail Merge task pane appears on the right of your screen.

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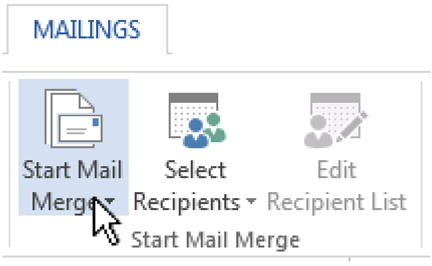
❷ 

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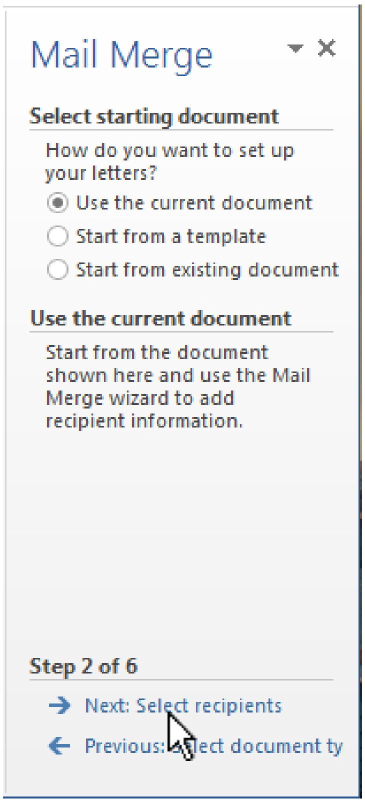
For this example, we'll stick with letters. The remaining steps may differ slightly depending on the document you're creating, but the basic concept remains the same.

Selecting a Starting Document

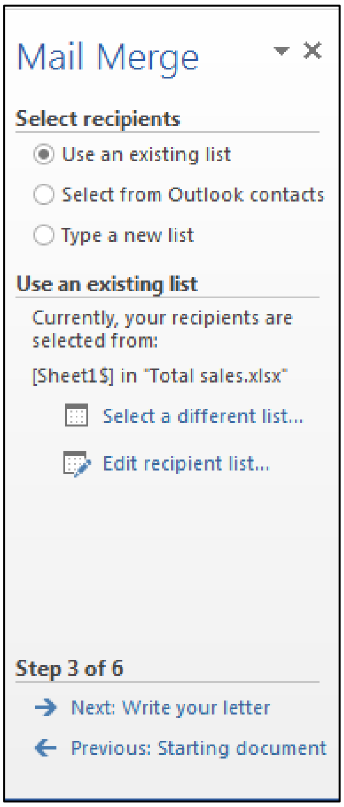
Once you finish Step 1 and click Next: Starting Document, you will be able to choose which document you wish to use for the mail merge.

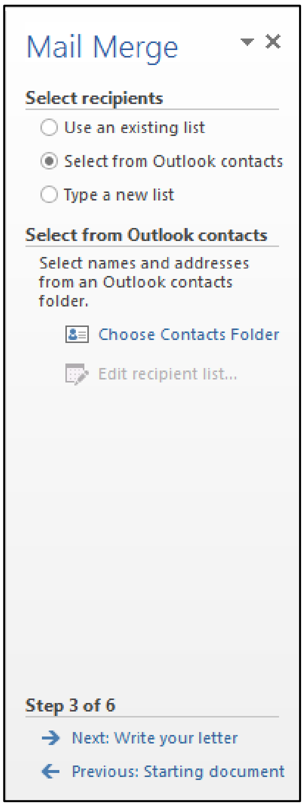


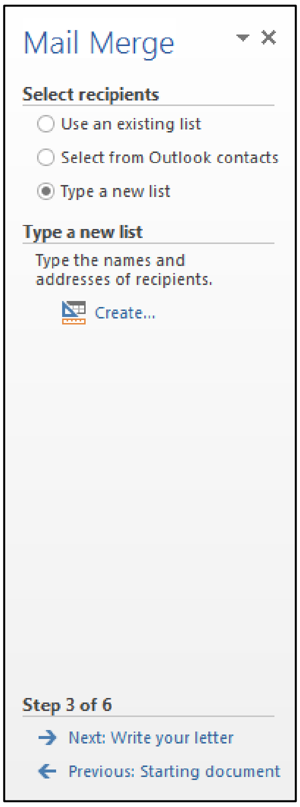
In this case, we've already created a letter, so we'll choose the current document. (Note that you can also use a template or an existing document, meaning a document that you've created but isn't open.) Once you've chosen the document, click Next.

Selecting Recipients

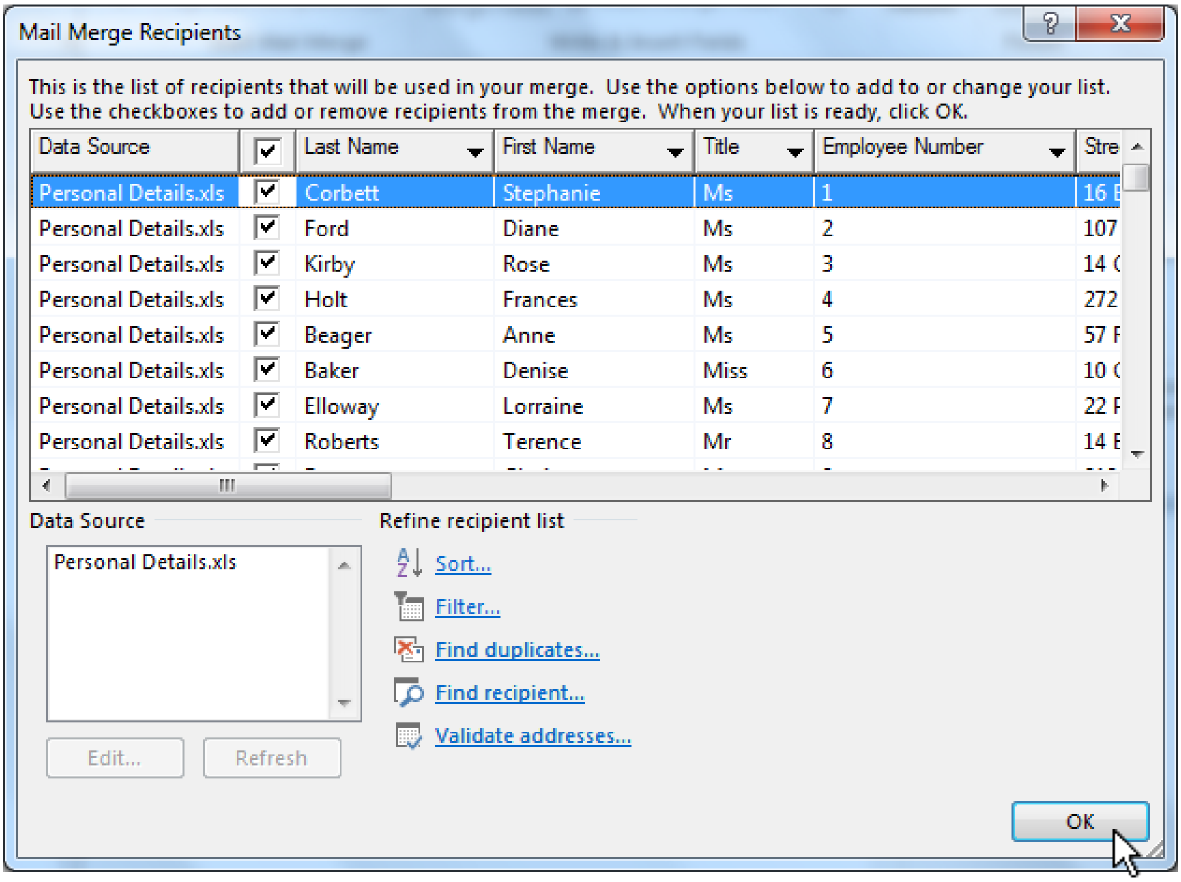
Step 3 of the Mail Merge Wizard prompts you to choose who the mailings will be sent to. Depending on the option you select, your choices will be different.







Once you pick a source and choose the specific list (or type a new list), you will be prompted to choose the recipients.

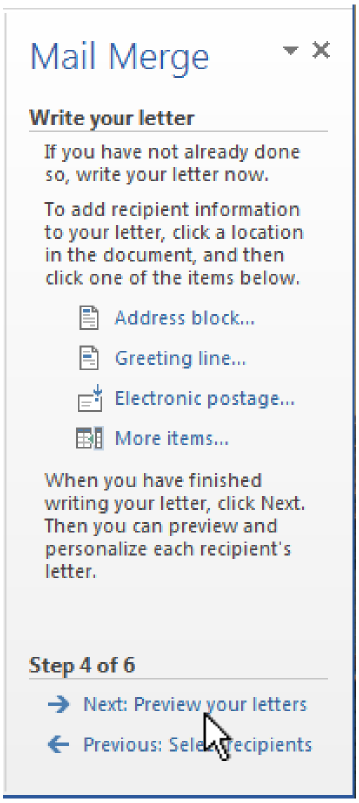


Simply check a contact to include it or uncheck a contact to remove it. Note that there are tools at the bottom of the dialogue that can help you sort, filter, find, and manage your addresses. These tools can be very useful if you have a large list.

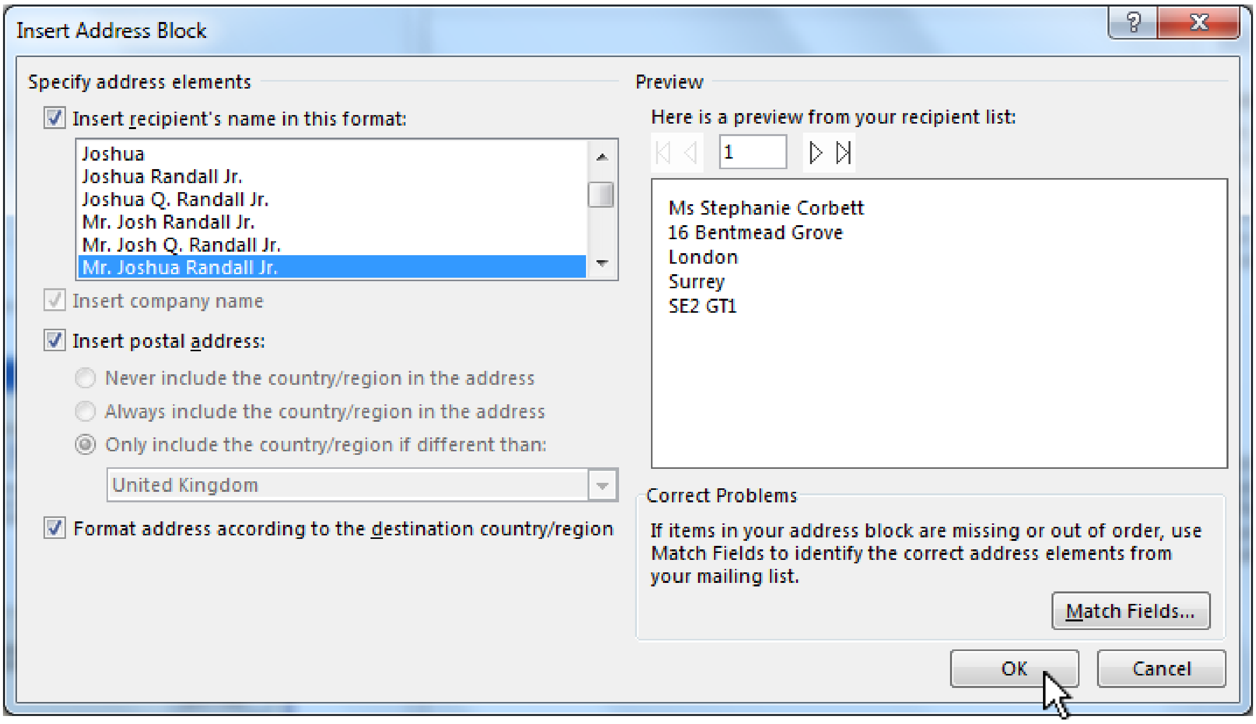
Once you click OK, you can click Next in the task pane to proceed to the next step.

Creating Your Document

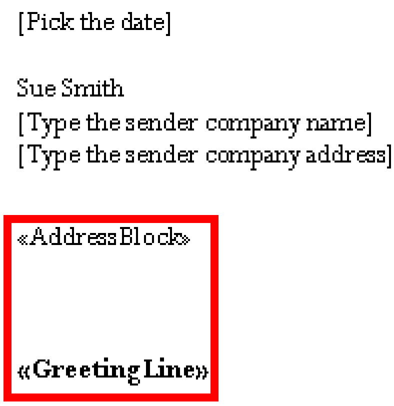
In the fourth step, you can create your letter.



If you haven't already done so, you can type the text that will be the same for each document. You can also click inside the document and then click each link to specify more information about the field. For example, if we click Address Block, we will be prompted to format the address block:



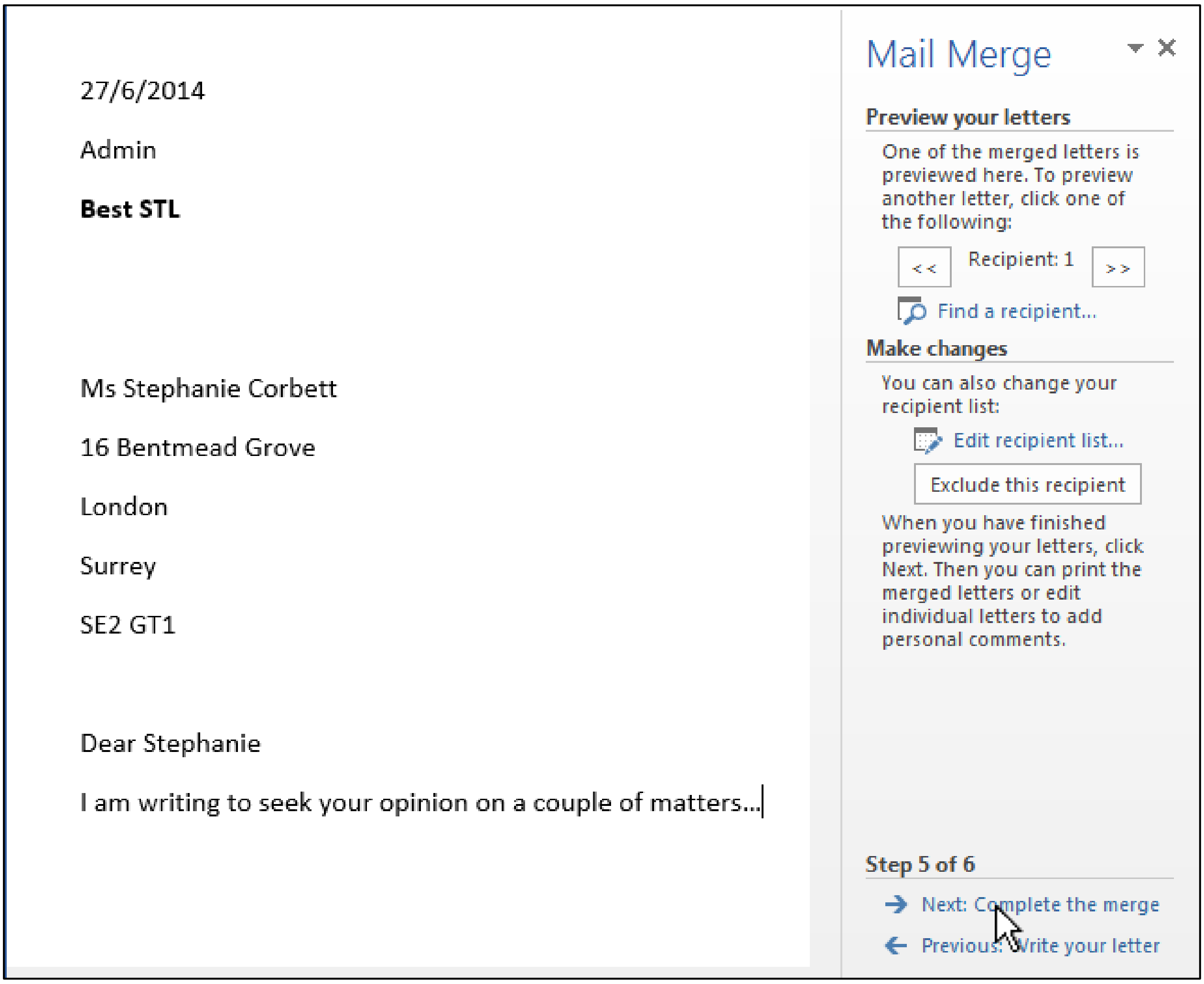
These fields will then appear in your document with angle brackets around them. They will be customized for each recipient when you perform the merge.



Once your fields are in place, click Next.

Previewing Your Document

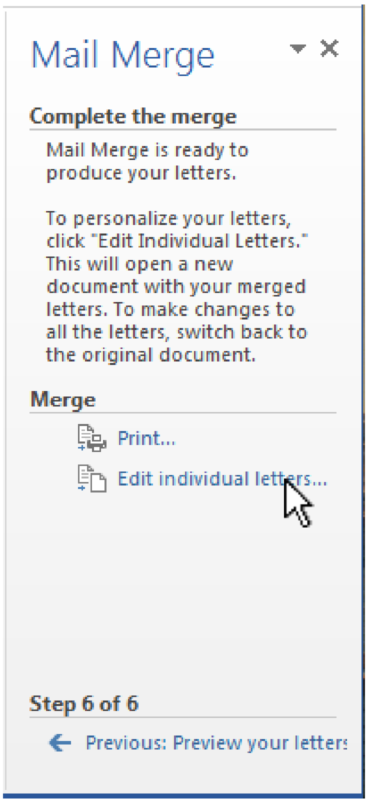
Step 5 will show you a preview of your document. You can use the arrows in the task pane to scroll through the recipients.



If you need to make any changes to the recipients, click Edit Recipient List in the task pane. You can also click the Previous link in the task pane to go back to any step. If you're all set, click Next to proceed to Step 6.

Completing the Merge

In Step 6, the merge will actually be performed.



These options will vary depending on the document type that you're creating. In this case, we can edit the individual letters (for example to add some personalization to each one), or we can simply choose to print them. In either case, the merge will be performed to a new document so that you can still make changes to the original letter and re-merge them.

Using Mail Merge to create labels

Labels can also be created using the Mail Merge Wizard as outlined in 'Using Mail Merge to create a letter', with a couple of exceptions:

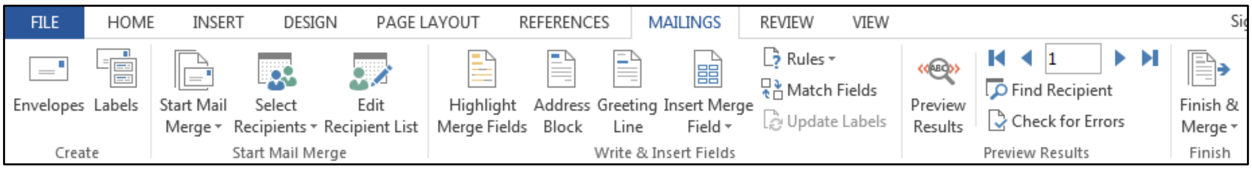
1. Select the Labels option at step 1.
2. Select the type of labels you are using by clicking the Label options link at step 2, if you are using labels from a manufacturer that are a standard size (e.g. Avery).
3. In step 3 select recipients as before.
4. In step 4 add address blocks and other items to the first label. Having set out that label satisfactorily, press Update All Labels.
5. In step 5, preview and complete the mail merge as for letters.

Performing a Manual Mail Merge

Although the mail merge wizard is great for creating basic documents, once you become comfortable with the process you may find the wizard too cumbersome and time-consuming. If that's the case, you may want to use the mail merge tools independently of the wizard. (You can also use the Mailings ribbon to enhance a wizard-created merge.) In this lesson, we'll talk about how to manually insert fields into your document and perform a mail merge without the wizard.

Using the Mailings Ribbon

Microsoft Office Word 2013 has far too many mail merge features for us to cover them all in depth. However, we will take a look at the Mailings ribbon, which does contain all the features you will need.

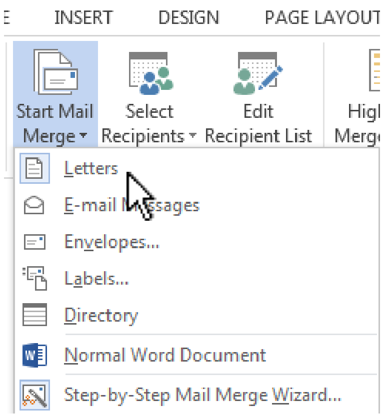


Group	Command	Description
Create	Envelopes	Click this button to open a special dialogue that will allow you to create envelopes.
	Labels	Click this button to open a special dialogue that will allow you to create labels.
Start Mail Merge	Start Mail Merge	Choose what kind of mail merge you want to start.
	Select Recipients	Choose the source for your recipient list.
	Edit Recipient List	Make changes to your recipient list.
Write and Insert Fields	Highlight Merge Fields	Highlight fields that will be merged to each record.
	Address Block	Create and insert an address block merge field.
	Greeting Line	Create and insert a greeting line merge field.
	Insert Merge Field	Insert other types of merge fields.
	Rules	Create rules for an advanced merge. (We'll look at these options in detail in a moment.)

Group	Command	Description
	Match Fields	Match fields in your recipient list to merge fields.
	Update Labels	If you are creating labels and have made any changes, click this button to update them.
Preview Results	Preview Results	Preview your merge.
		Navigate through merged records.
	Find Recipient	Find a particular recipient.
	Auto Check for Errors	Check your mail merge for problems.
Finish	Finish and Merge	Complete the merge.

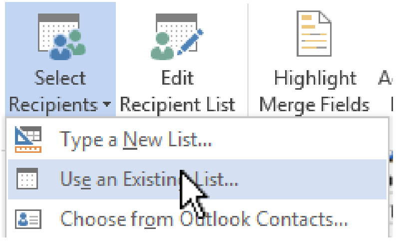
Selecting a Starting Document

If you're performing a mail merge on your own, you should choose a starting document so that Word gives you the appropriate options. Simply click the Start Mail Merge button and choose the document type.



Selecting and Editing Recipients

To choose your recipients, click the Select Recipients button on the Mailings ribbon and then choose a source for your recipient list.

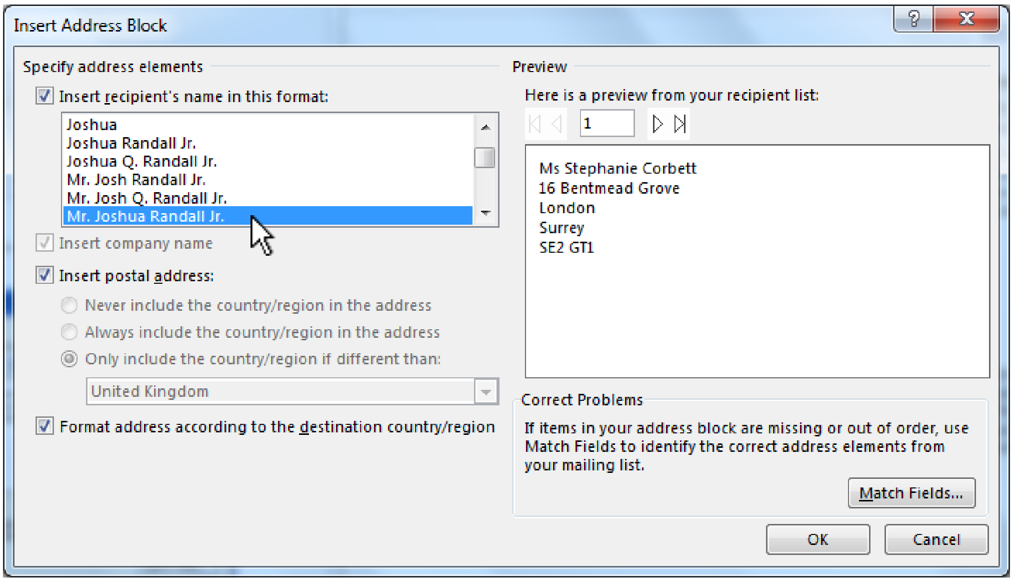


Once you choose a source, you will see a dialogue prompting you for more information. If you ever need to edit the list, click Edit Recipient List (next to Select Recipients).

Adding Fields

To add fields, place your cursor where you want the field to appear and click any field name in the Write and Insert Fields group of the Mailings ribbon.

You will then be prompted to customize that element, just as we did with the Mail Merge wizard.



Adding Rules

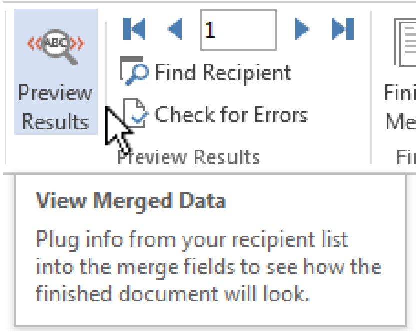
Rules are like fields, except that they operate on conditions. To add a rule, first click to place your cursor at the position that you want the rule. Then, click the Rules button on the Write and Insert Fields group of the Mailings ribbon and click the rule that you want.

Let's take a look at each option.

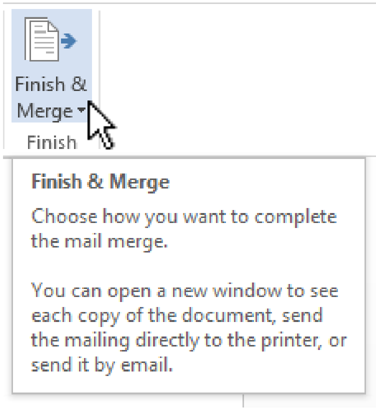
Ask	If you have created bookmarks, insert this field at the beginning of your document. Then, Word will ask you what text you want to put in and place that text at each bookmark as it merges each record. (Text can be different for each record.)
Fill-in	When you complete the merge, Word will ask you what text you want to place in this field as it merges each record.
If…Then…Else…	This dialogue box lets you set exceptions for your merge. If a field equals a certain value, Word will insert a certain text string. Else, Word will insert a different text string.
Merge Record #	This will add a number to each label.
Merge Sequence #	Counts the number of successfully merged records.
Next Record	Inserts the next record into the current document.
Next Record If…	Inserts next record into the current document if conditions are met.
Set Bookmark	Sets a bookmark at a specified location. In a mail merge, bookmarks are mainly used to indicate where to insert Ask text.
Skip Record If…	Skips the record if certain conditions are met.

Previewing and Finishing the Merge

To preview the results of your merge, click the Preview Results button.



Note that this command can be toggled on and off, giving you an easy way to check what the finished product will look like. Once your document is ready to be merged, click the Finish and Merge button and choose your option.



Creating Forms

People and companies are regularly using computers as a way of managing data. Microsoft Office Word 2013 can help you with this task.

In this section, we will learn about how to create a form for data entry, how to add controls to it, and how to format controls.

Using the Developer Ribbon

The Developer ribbon will be a key tool for many of our tasks in this manual. Tools for creating form controls are accessed through the Developer ribbon. If the Developer ribbon is not visible at the top of the Word 2010 screen, do the following.

1. Click the File tab and then click Options.
2. In the Customize Ribbon category, check “Developer” in the right hand pane and click OK. The Developer Ribbon appears at the top of the screen to the right of the other ribbons.

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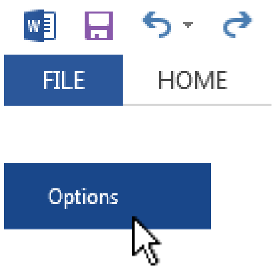

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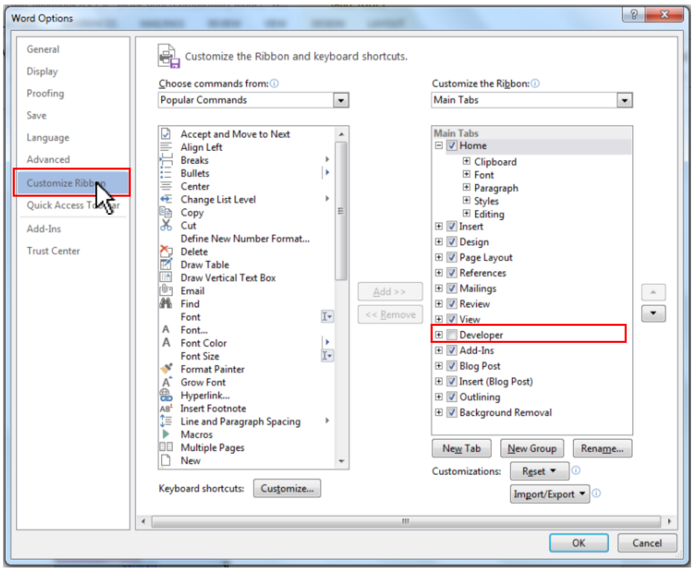
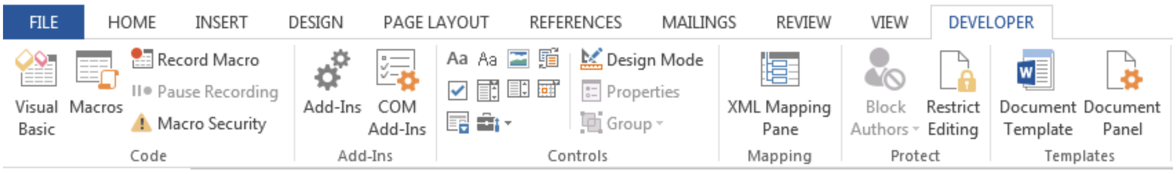


Now you will see the Developer ribbon.



Let’s take a look at its features. Remember that we will cover most of these features in detail, so don’t panic if you don’t understand the details of each command.

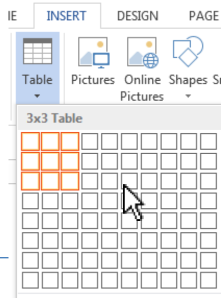
Group	Command	Description
Code	Visual Basic	Opens the Visual Basic Editor.
	Macros	Opens the Macros dialogue.
	Record Macro	Begin recording a macro.
	Pause Recording	Pause recording.
	Macro Security	Opens the Macro Security dialogue.
Add-Ins	Add-Ins	Manage the Add-Ins available for use with a file.
	COM Add-Ins	Manage the available COM add-ins
Controls	Gallery	Click one of these controls to add it to a form.
	Design Mode	Switch to form design mode.
	Properties	Open the properties of the current object.
	Group	Group selected objects.
Mapping	XML Mapping Pane	See the XML data stored in a document and create content controls that are linked to it.
Protect	Block Authors	Block Authors
	Restrict Editing	Restrict permissions, viewing, and editing.
Templates	Document Template	Opens the Templates and Add-ins dialogue.
	Document Panel	Add a custom template and/or show the Document Panel.

Creating a Form

To start with, let's look at creating a basic form.

When creating a form, consider using a table as the basis of the form as form controls can be entered into their own cells in the table. This then makes it easier to control layout and alignment.

The Table command can be found on the Insert ribbon.)



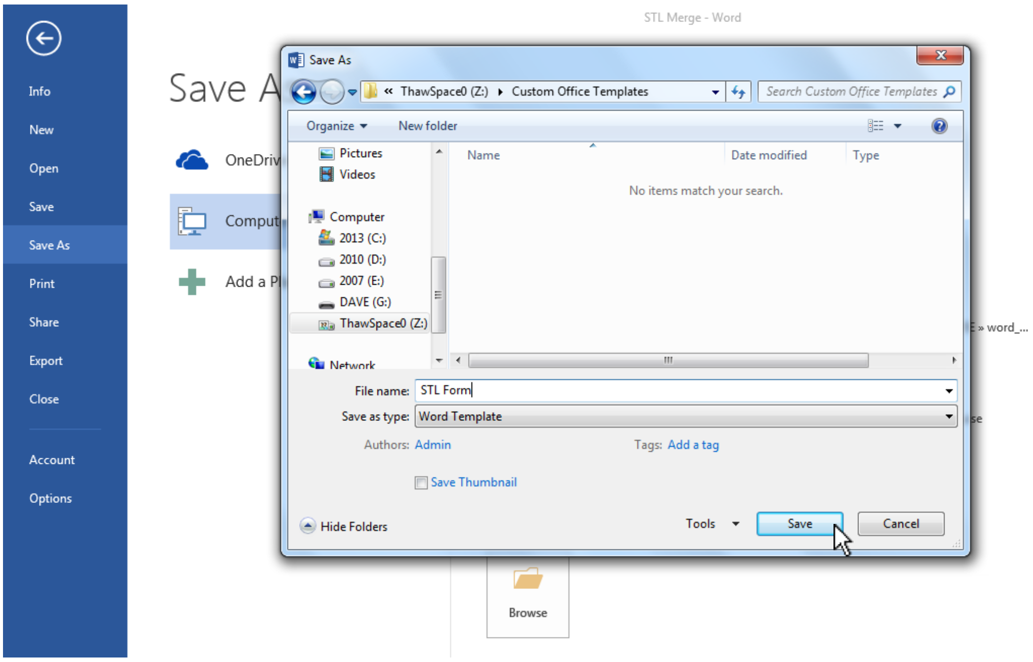
Sales Survey

Date of Purchase:		**Product (s) Purchased:**	
Store Location:			
Was this your first time shopping with us?			
How would you rate your shopping experience with us?			
Would you shop with us again?			
Home Phone Number		**E-mail address**	

Saving a form

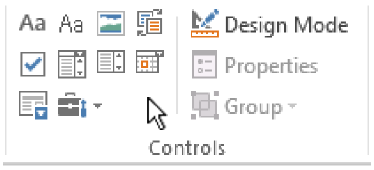
As a form is used numerous times, consider saving the form as a template file.
Click the File menu, click Save As. Choose which location to save into and choose Word Template. Be aware of which folder the template is being saved into (in Word 2013, if saving into the Computer, this will normally be in the Custom Office Templates folder).

Then, enter a name for your file and click Save.



Inserting Controls

Now that we've created the skeleton of our form, it's time to add some controls. These controls will allow users to interact with our form, either in electronic or paper format. The basic controls can be found on the Controls group of the Developer ribbon.



Let's take a look at each command in turn.

Inserts a rich text box control.

Inserts a plain text box control.

Inserts a picture control.

Inserts a building block.

Inserts a check box

Inserts a combo box, where users can pick multiple items from a drop-down menu.

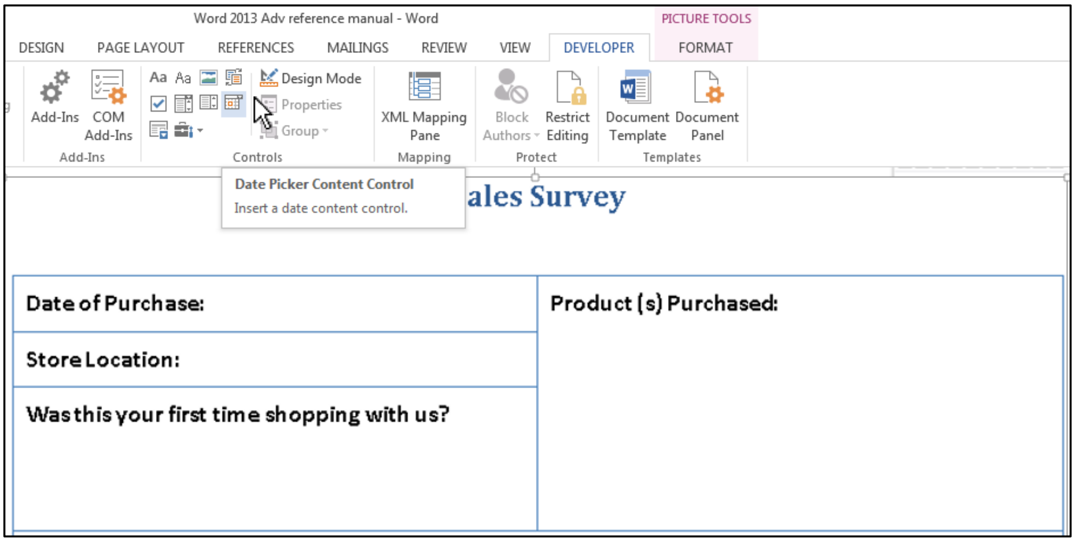
Inserts a drop-down list, where users can pick from a drop-down menu.

Inserts a date picker, where users can pick from a calendar.

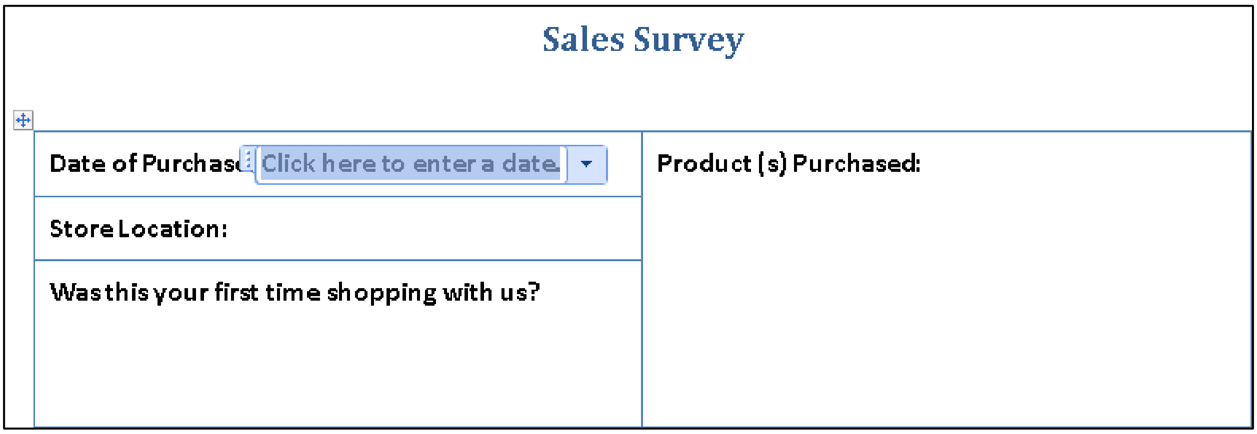
Repeating section content control

This menu contains form Legacy controls (controls offered in previous versions of Word and ActiveX controls).

To insert a control, first place your cursor where you want the control to appear. Then, click the desired icon in the Controls group.



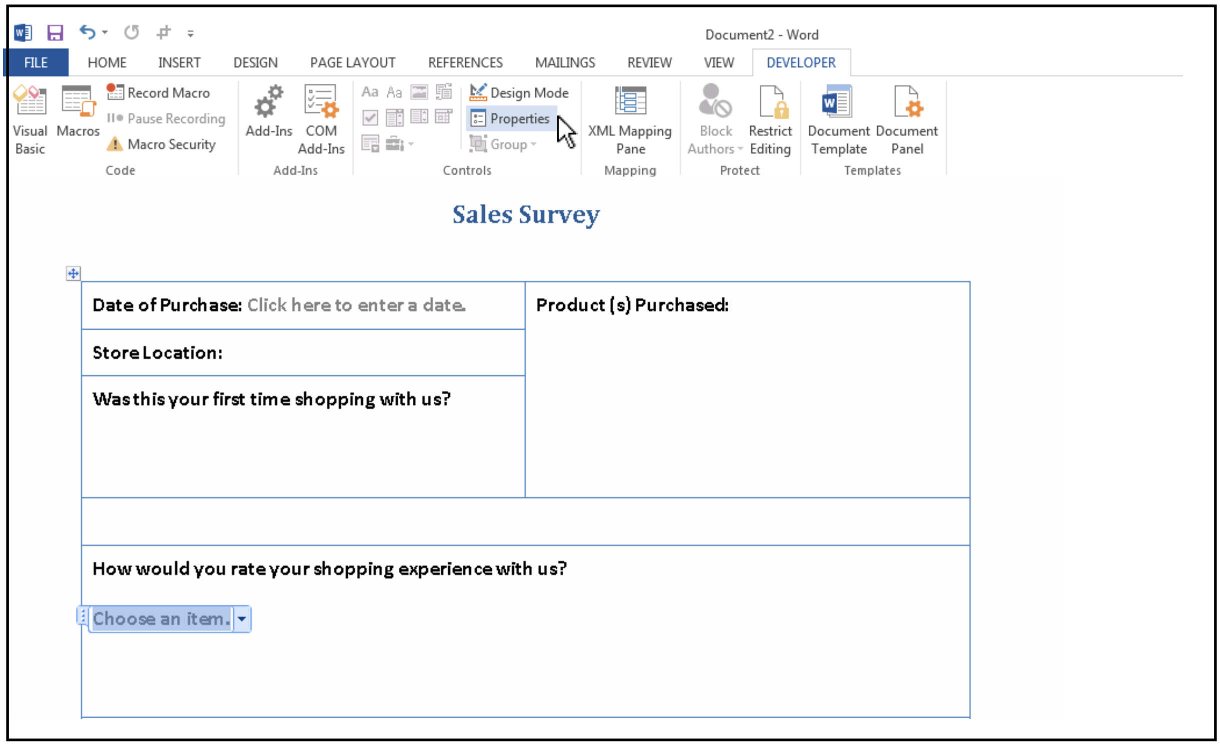
The control will then display.



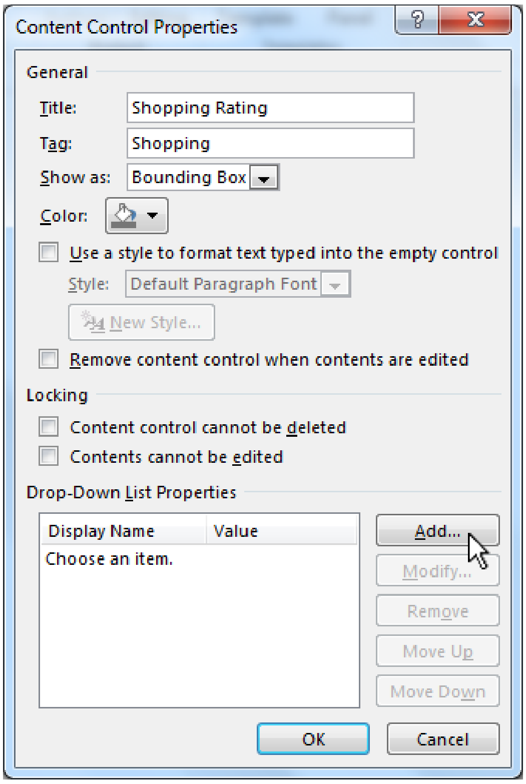
Modifying Control Properties

In the case of the date picker that we just inserted, the control is pretty much ready to go. But if you insert a customizable item such as a drop-down list or a combo box, you need to tell Word what the menu items will be.

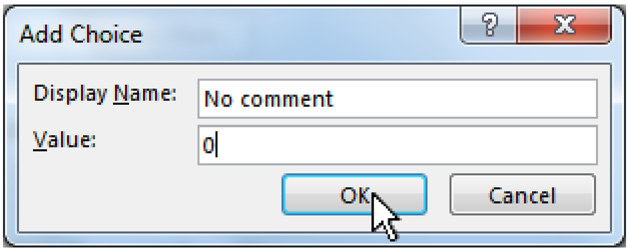
To do this, first insert the control. Then, click it to select it and click the Properties command on the Control group of the Developer ribbon.



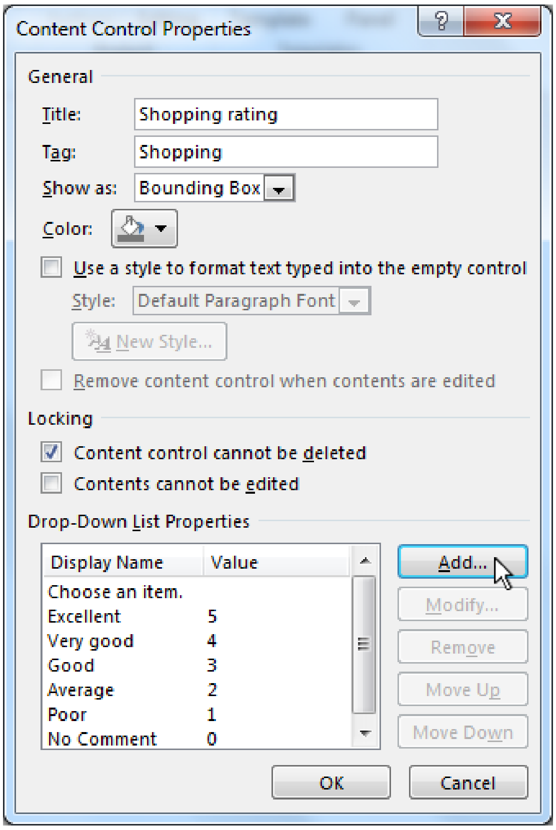
In the Content Control Properties window, click Add to add items to the list. (Note that this dialogue may differ depending on which control you have selected.)



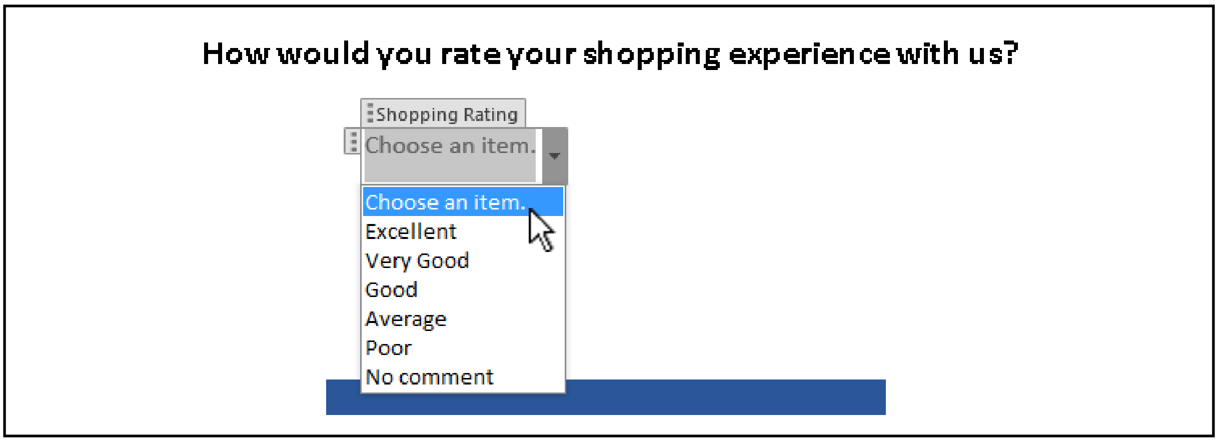
You will then be prompted to type a name and, if you desire, a value for the choice.



Once you click OK, you will be returned to the Content Control Properties dialogue. Simply click Add again to add more list items.



Here, we have added a title to the control and added four list properties. Here's what the control will look like in the form once we click OK:



Note that you can modify properties for any control, even if it's just to add a title.

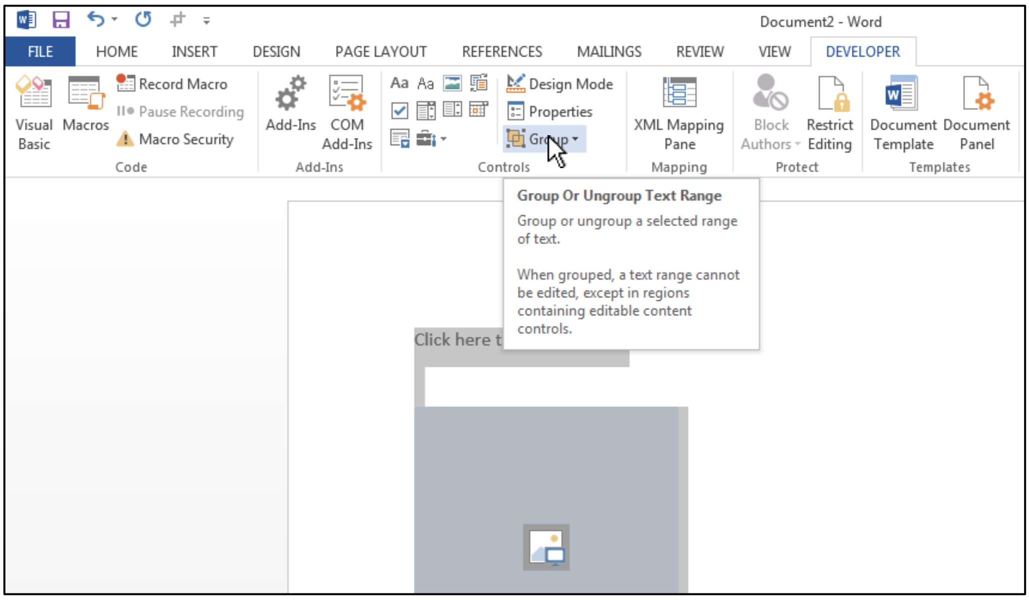
Finishing Forms

In our last section, we started creating a basic form. In this section, we'll continue with the process, learning how to group controls, test forms, protect forms, and distribute forms.

Grouping Controls

If you like, you can group a range of text and controls so that they cannot be edited. This is a good way to lock down parts of your form while you're developing it so that you don't accidentally change something that you consider finished. (We'll discuss protecting the whole form in a moment.)

First, select the data that you want to group. Then, click the Group command on the Developer ribbon.

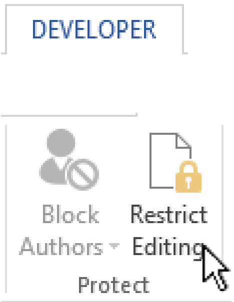


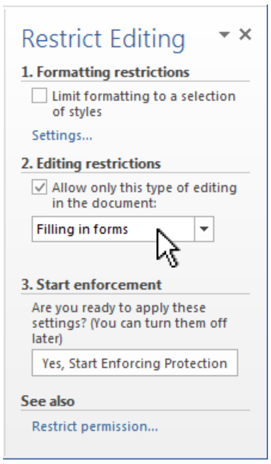
Once grouped, although we can edit the properties of the control, we cannot edit the text itself.

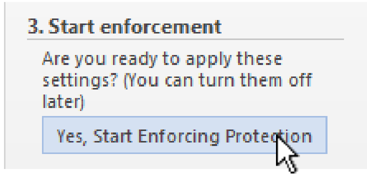
Protecting a Form

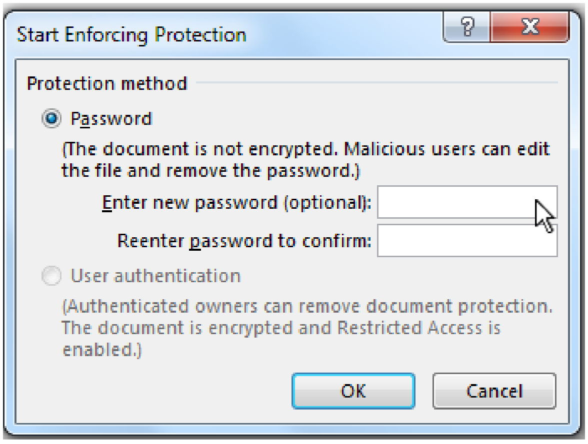
Once the form is ready for use, it should be protected so users can only use the controls in the form for the purposes of filling the form in.

1. Go to Developer ribbon/Protect group and click the Restrict Editing button.
2. Check the box underneath Editing Restrictions and select Filling in Forms.
3. Click the Yes, Start Enforcing Protection button.
4. Enter and reconfirm a password to apply protection.

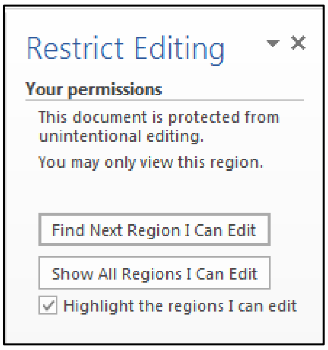
❶ 

❷ 

❸ 

❹ 

You should always enter a password; otherwise, users can easily unprotect the form. Once you click OK, the Restrict Formatting and Editing task pane will change to let you know you can only fill in the form.

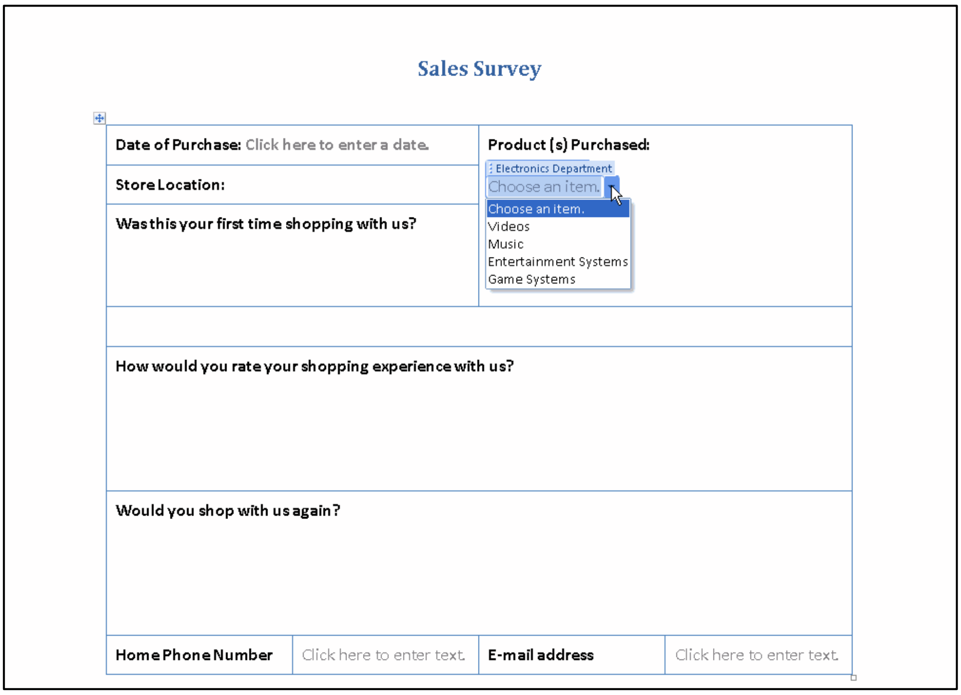


To stop protecting the form, click Stop Protection at the bottom of the Restrict Editing pane. If a password has been used to protect the form, you will be prompted for it. (Without the password, the document cannot be unprotected.) If a password has not been used, the document will be unprotected and can be freely edited.

Testing a Form

Microsoft Office Word 2013's form tools allow a user to see control results while editing the form.

However, before distributing the form, you should test it. To do so, first protect the form as shown in the previous section. To fully test the form, you should save it as a Word document file (to protect the template). Now you will be able to fill out the form just as a user would.



Distributing a Form

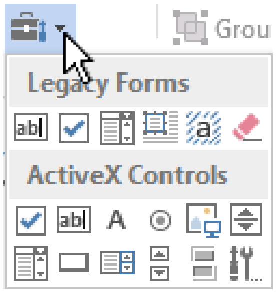
Once your form is perfect (and protected!) it's time to distribute it. You can e-mail it to other people for them to fill out, print it out to be filled out as a hard copy, or post it to a group workspace for it to be filled out. You can also use a combination of these methods to reach your entire audience.

Advanced Forms Tasks

So far, we've created a basic form and protected it. However, there are a lot more tasks you can perform with forms. In this section, we'll look at using legacy and ActiveX controls and assigning help to a form field.

Using Legacy Controls

Legacy controls can be found on the Controls group of the Developer ribbon.



Let's take a look at the six controls offered.

	Inserts a text field.
	Inserts a check box.
	Inserts a list box.
	Inserts a frame
	Shades form fields.
	Reset form fields to empty; useful when testing.

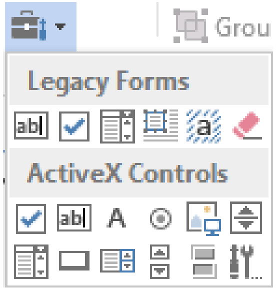
Like other controls, simply click to place your cursor and then click the control.

And, like newer style controls, you can edit the properties of the legacy control by selecting it and then clicking Properties on the Controls group of the Developer ribbon.

Note that you must click the Design Mode button to delete or edit ActiveX or legacy controls.

Using ActiveX Controls

Below the legacy controls are ActiveX controls. These controls have the ability to use scripting.



Let’s take a look at each control.

 Inserts a check box.

 Inserts a text box.

 Inserts a label.

 Inserts an option button.

 Inserts an image control.

 Inserts a spin button.

 Inserts a combo box.

 Inserts a command button.

 Inserts a list box.

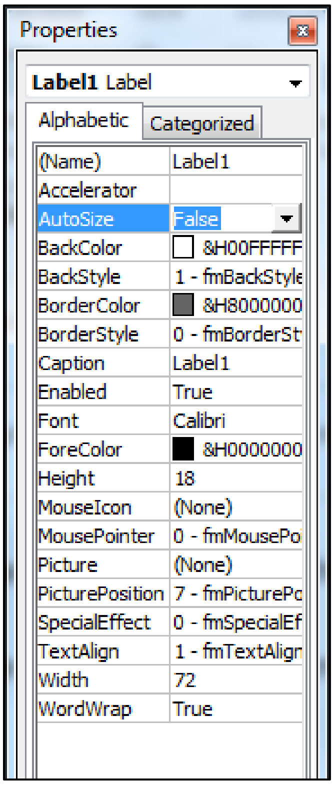
 Inserts a toggle button.

 Inserts a box with a scroll bar.

 Opens a menu so you can choose a different type of control.

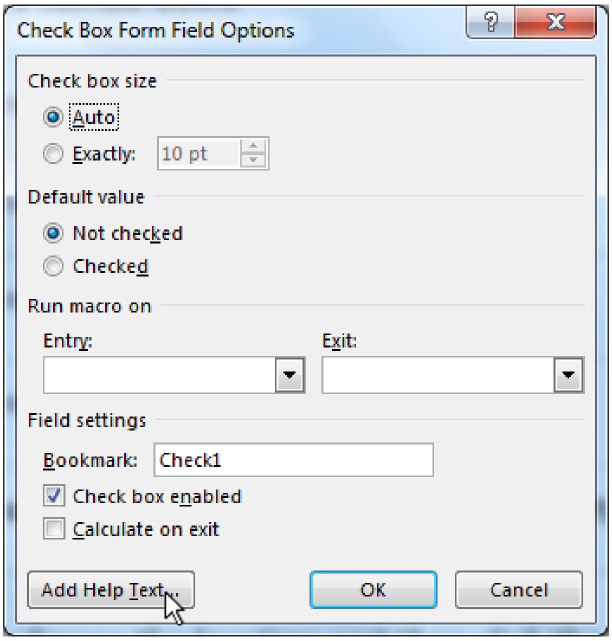
Like other controls, simply click to choose the location and then click the control.

Like other controls, ActiveX controls have properties that can be modified, but the properties sheet looks quite different.

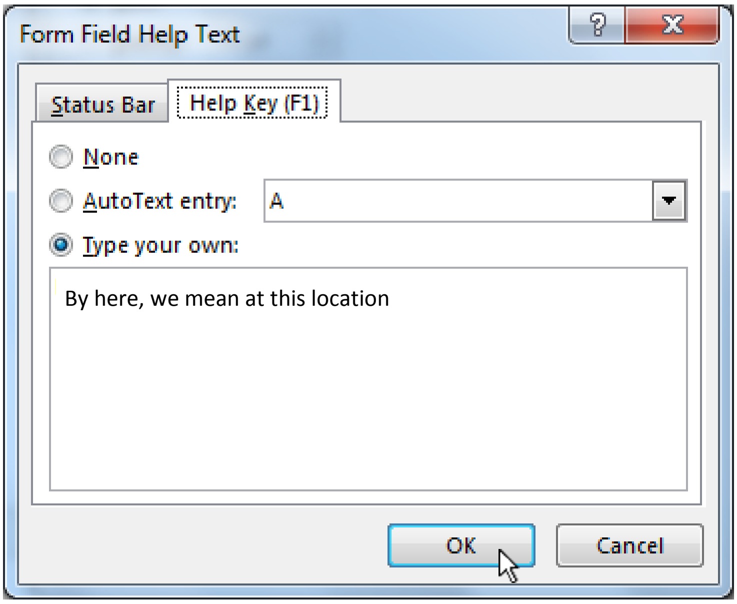


Assigning Help to a Form Field

With legacy controls, you have the ability to add help to the field. Simply open the control's properties and click Add Help Text.



You then have the option to display help in the status bar or in a pop-up box when the F1 key is pressed.

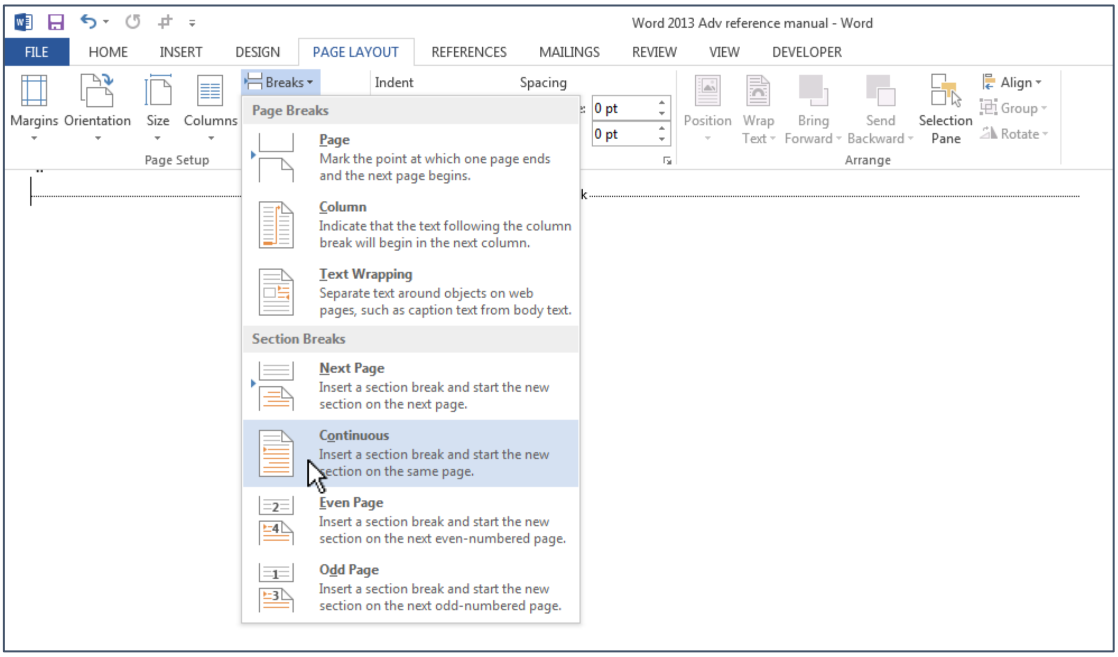


Once you click OK, your help will be applied to the control. Note that the form must be protected to display the help.

Using Multiple Sections

If you would like, you can have sections of your form protected while others remain unprotected. This can be a good idea if you want the user to be able to add to the document, such as a comments section at the end of the form. The entire form must be unprotected initially, for you to be able to make these changes.

The first step to doing this is to move your cursor to where you want the unprotected section to start. Once your cursor is in the correct location, click the Page Layout ribbon, click Break, and select the appropriate Section Break.



1. Go to Developer ribbon/Protect group and click the Restrict Editing button.
2. As before, we're going to check the box in Step 2 and choose "Filling in forms" for the editing type. Next, we'll click on the Select Sections link (this link will only be available when sections are in the document).
3. Check the sections that you wish to enforce protection over and click OK.
4. Click the Yes, Start Enforcing Protection button.
5. Enter and reconfirm a password to apply protection.

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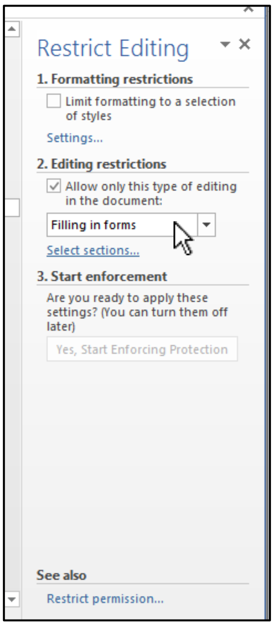

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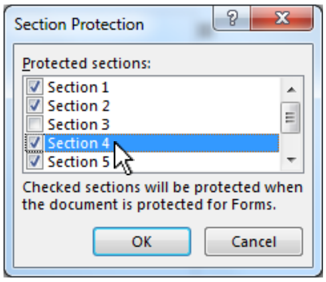

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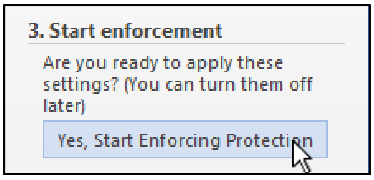

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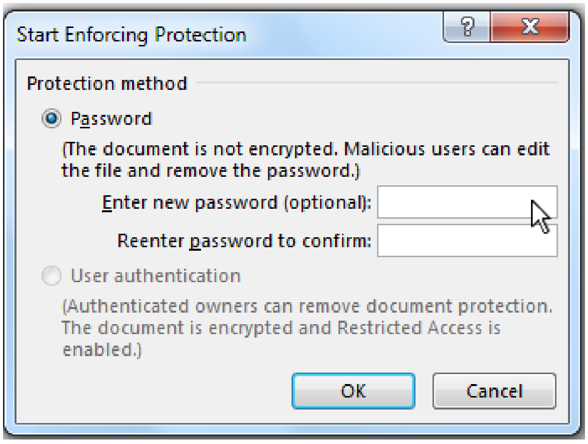
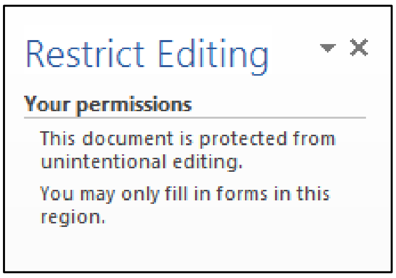
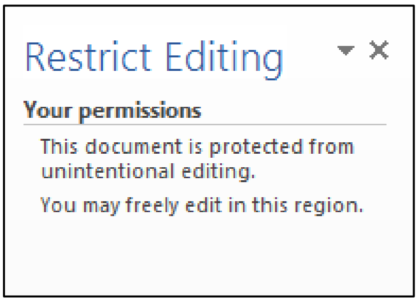


Now, the Protect Document task pane will tell you what you can and cannot edit when the form is protected. Here's what the task pane will say when we are in a protected section:



If we move to an unprotected section, we'll see a different message.



Working with References

In this section you will learn how to:

- Mark text using heading styles, outline levels, or the References ribbon
- Insert and update a table of contents
- Use footnotes and endnotes
- Use bookmarks
- Use cross-references
- Insert citations
- Manage sources
- Use various bibliography styles
- Insert and update a bibliography
- Mark index entries
- Create and update an index, table of figures, and a table of authorities
- Link to another document
- Create and work with a master document and sub-documents
- Perform basic master and sub document tasks

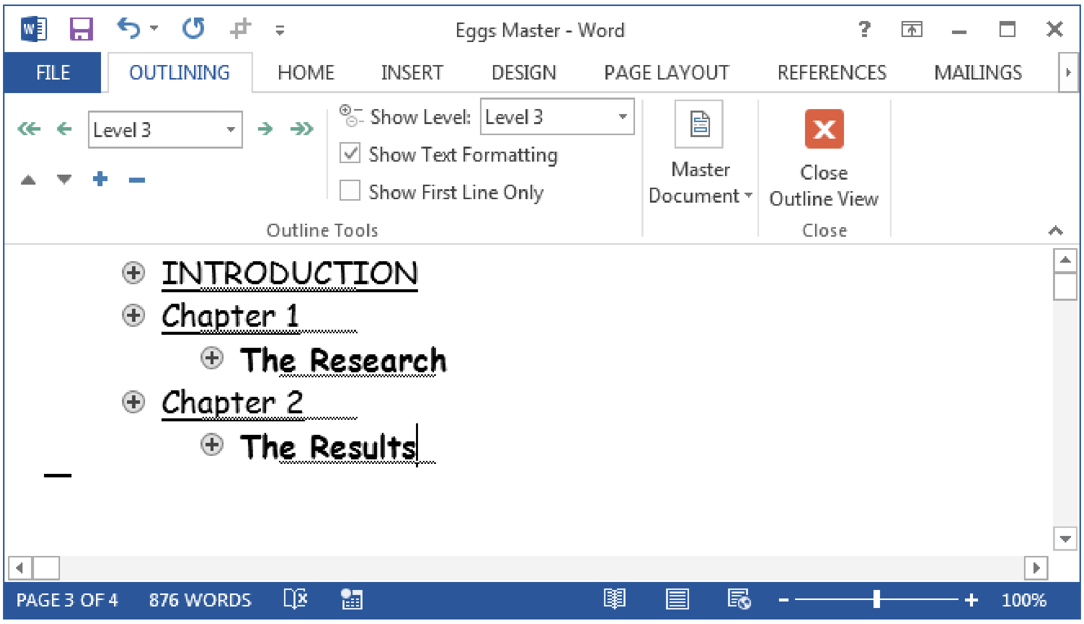
Creating and Working with a Master Document

A master document is a document that contains a set of related documents called sub documents. The purpose of a master document is to break up a large document into sub documents for easier organisation and manageability. This can be useful if several different people are working on creating parts of the same document, e.g. a report.

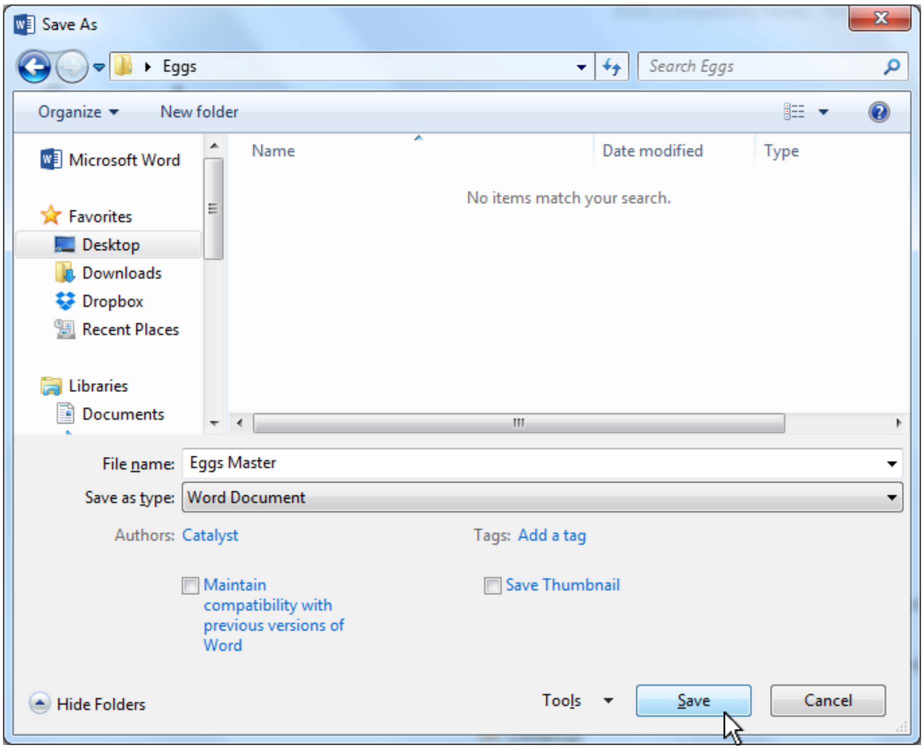
Note: Master document and sub document files must all be saved into the **same folder**.

The first thing we need to do is create a location in Windows where all the documents for this project (the master document and all the subdocuments) are going to be stored. In our example we are going to create a folder called "Eggs" on the desktop.

Then, we'll create our master document. We'll start with a blank document and then switch to Outline view (remember that we can do this using the View ribbon). Then, we'll type up our document in outline mode, assigning headings and levels to each of our topics. (You can also take an existing document and format it using the outline view.)



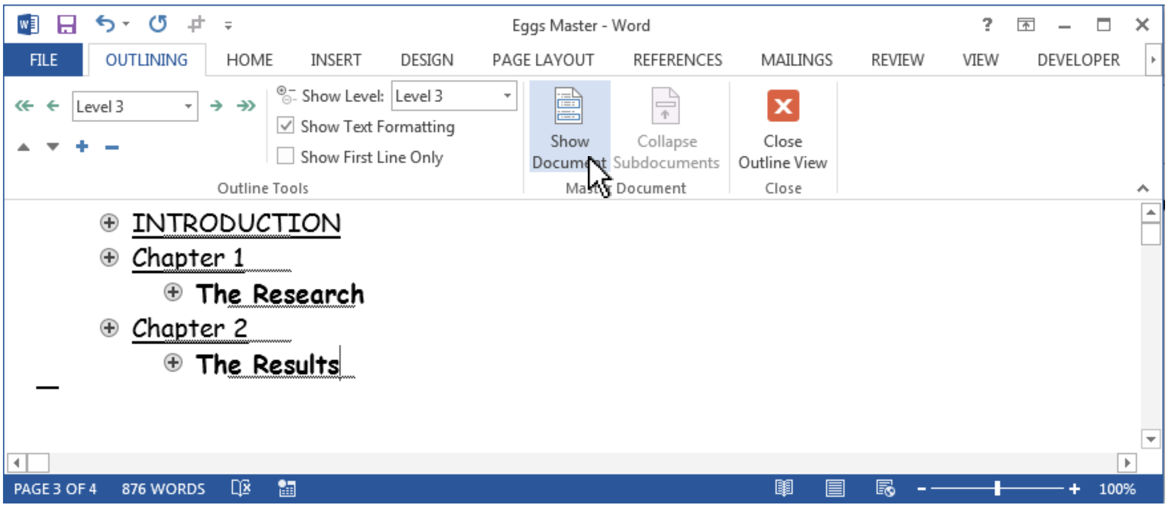
Then, save the document in the location you've decided on for this project. Your master document is done!



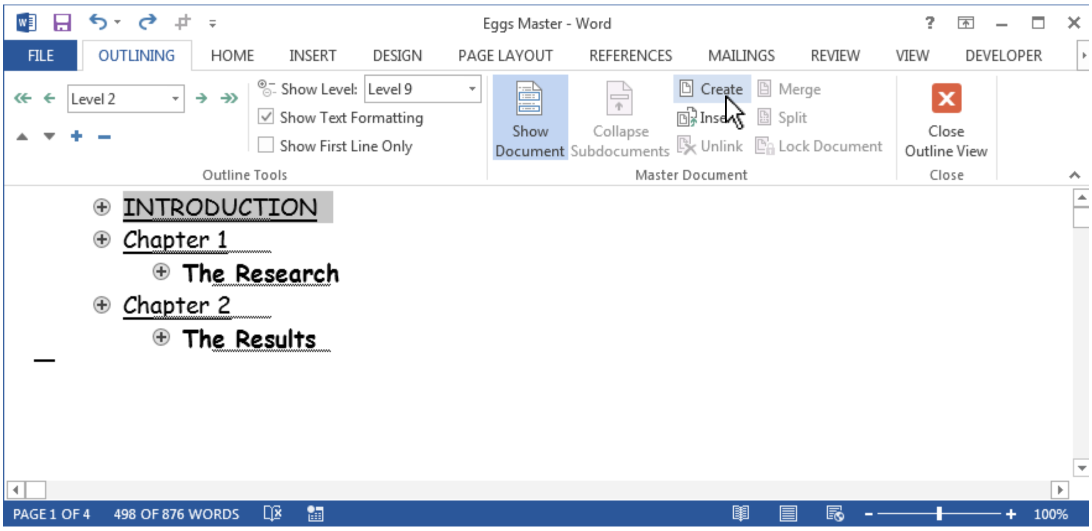
Creating and Working with Sub-Documents

There are two ways to add sub-documents to a master document. Note that when you do so, Word inserts continuous section breaks at each end of the subdocument.

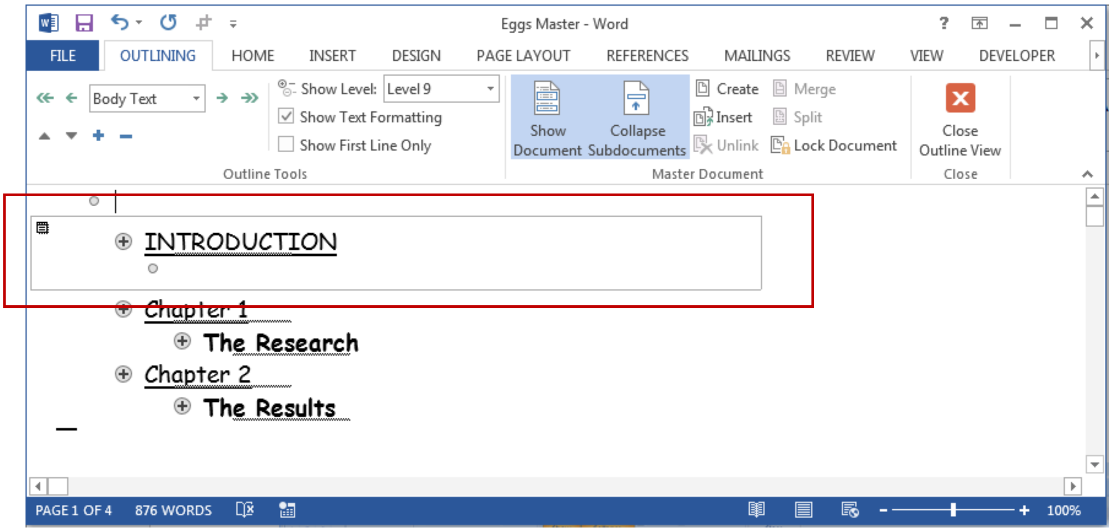
Method 1
The first way to add a subdocument is to create a new one from existing text. First, switch to Outline view and click the Show Document command on the Outlining ribbon.



This will display an extra set of subdocument controls. Then, select the headings and text that you want to split into subdocuments. Next, click the Create button on the Outlining ribbon.



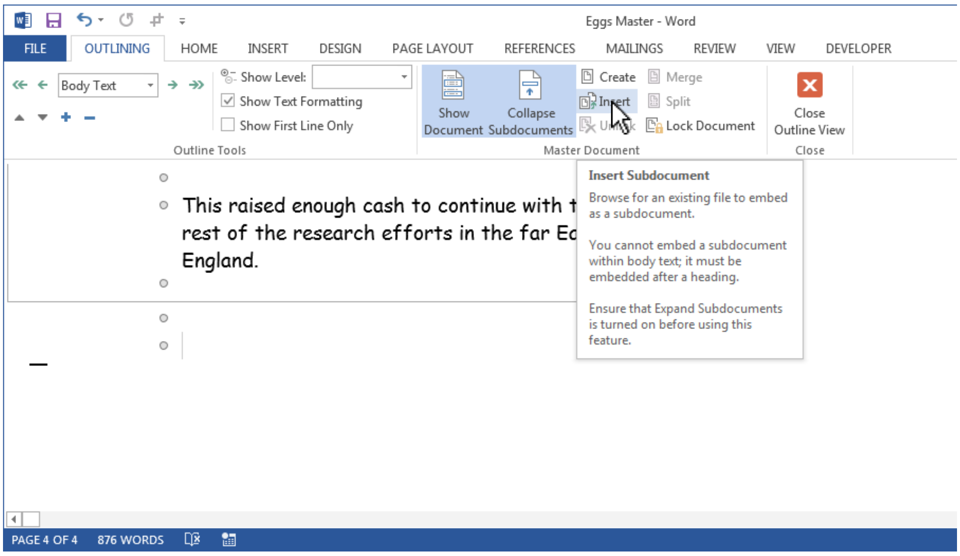
Once this button is clicked, the selected text will be turned into a subdocument.



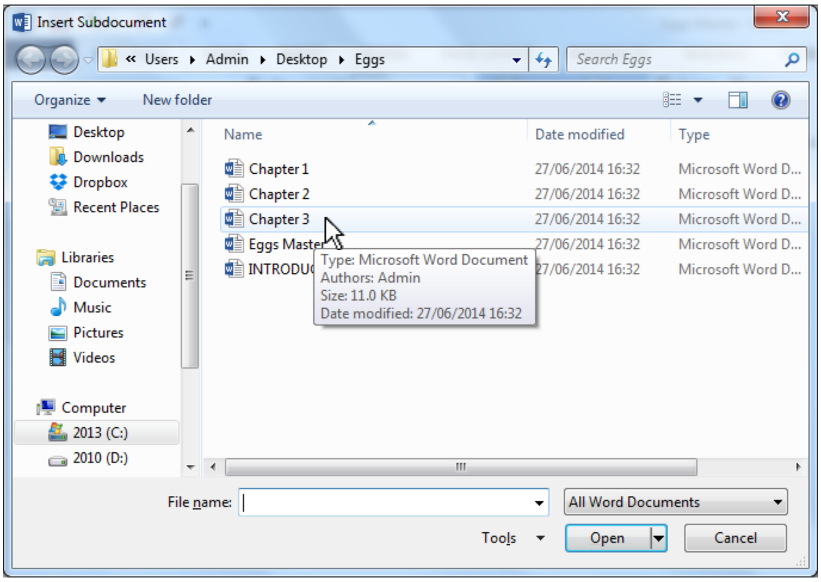
In the image above, note the light border around the text. Also note the small document icon to the upper left of the heading.

Method 2
You can also add a subdocument by using the Insert command on the Outlining ribbon.

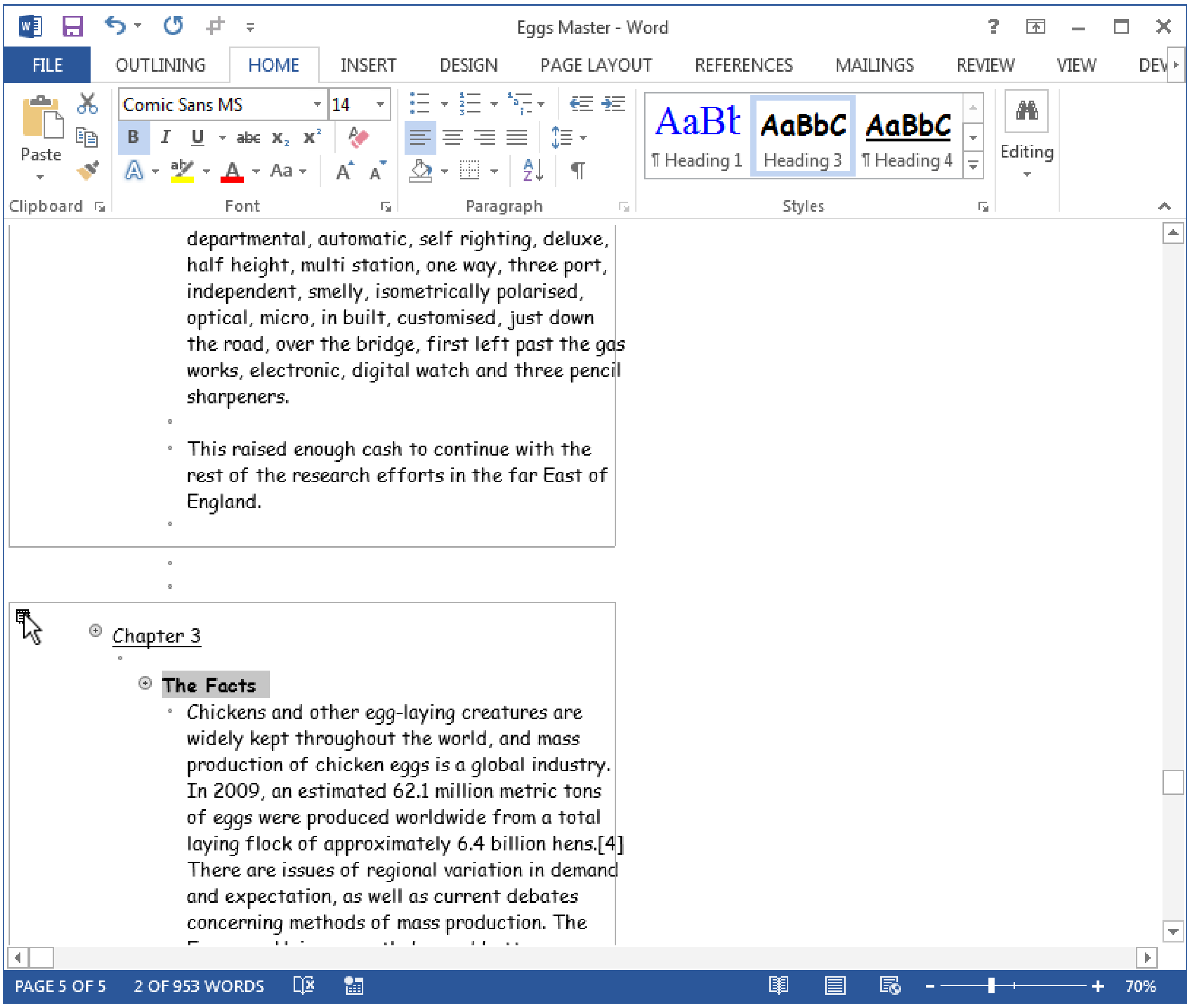
First, make sure you place your cursor where you want the subdocument to go.



Once you click Insert, you will be prompted to choose the subdocument. Remember that subdocument(s) should be in the same location as the master document.

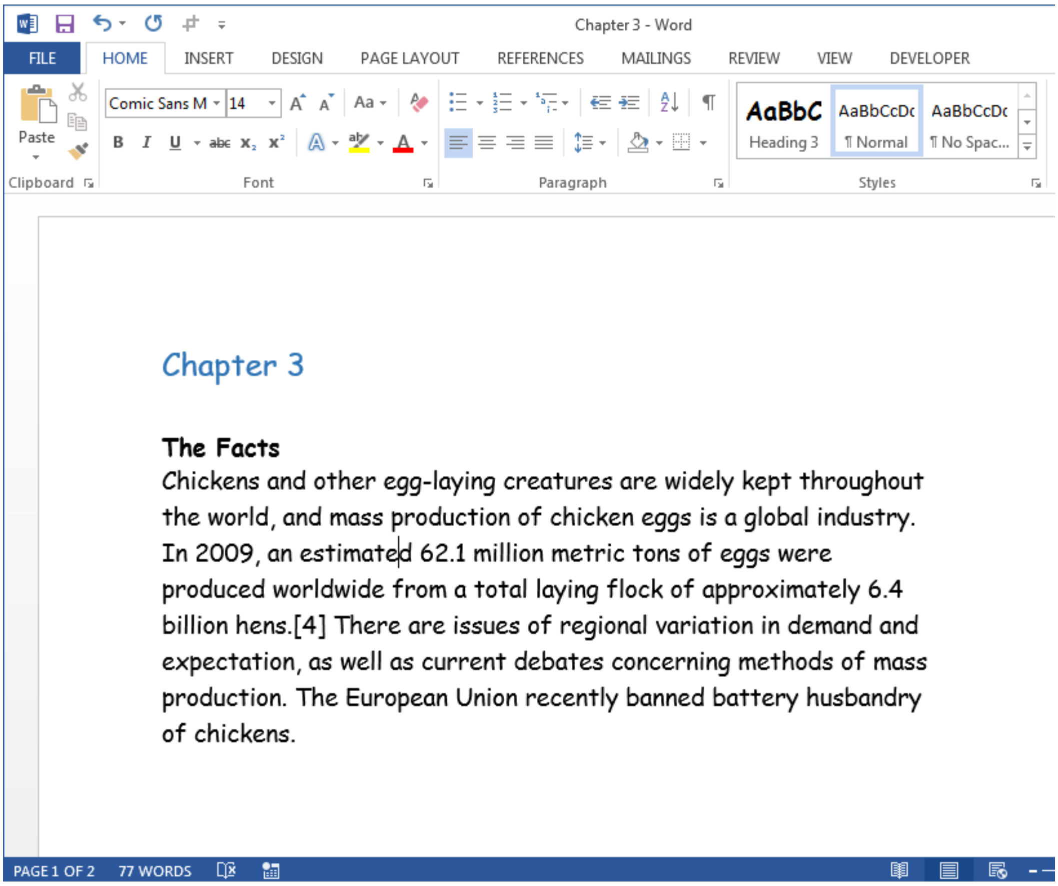


Once you click Open, you will see the subdocument added to the master document.



Note that a subdocument can be opened so that it displays in its own window by double-clicking the document icon.

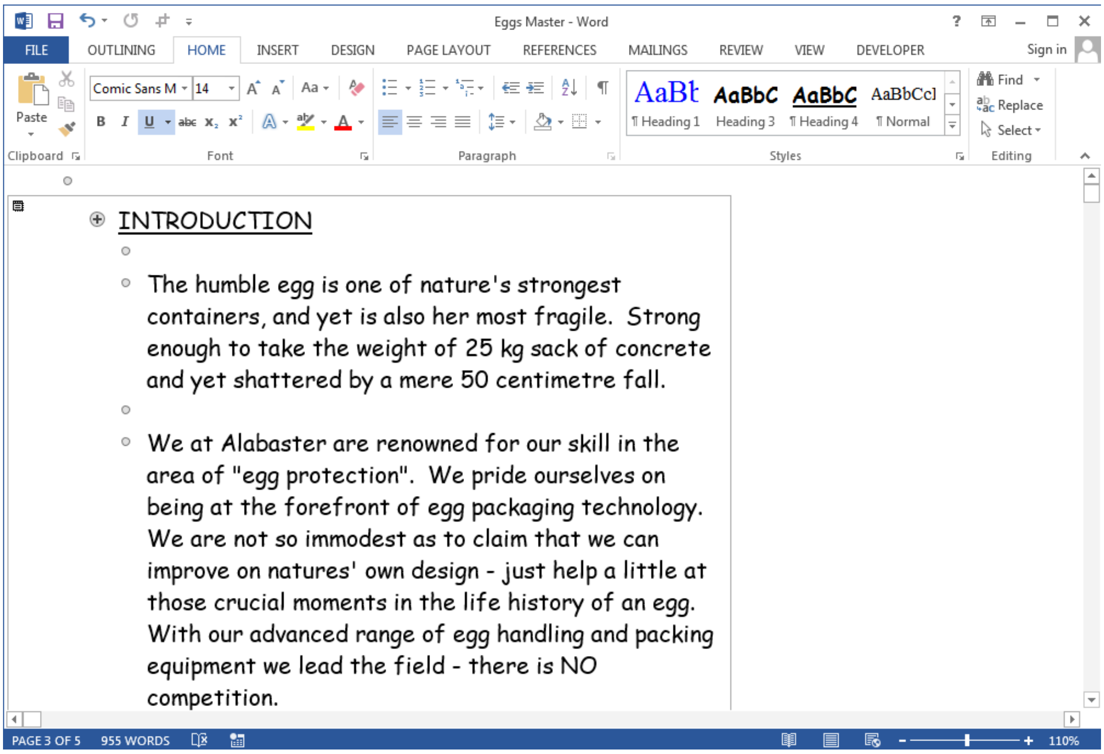
Note that although this document is separate from the master document, if you make changes in the document and save it, those changes will be reflected in both the sub-document and the master document.



Note that when you save a master document with subdocuments, the following things will happen:

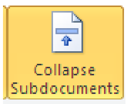
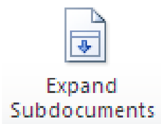
- All subdocuments will be expanded.
- All subdocuments will be saved back to their original files.
- All subdocuments created from existing text will be saved in the same location as the master document.

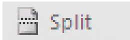
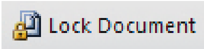
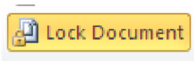
If you receive prompts for any of these tasks, you should click Yes to proceed.



Other Master Document and Subdocument Tasks

The Outlining ribbon offers many tools to help you manage master and sub documents.

Edit a subdocument		Edit it in the master document, or open it in its own window using the document icon in the left hand margin.
Move a subdocument		Click the document icon in the left hand margin and then drag the subdocument to its new location.
Delete a subdocument		Select the document by clicking the document icon in the left hand margin. Then, press the Backspace key on the keyboard.
Collapse all subdocuments		You can collapse subdocuments so that just the link to it is shown. Just click the Collapse Subdocuments button on the Outlining ribbon.
Expand all subdocuments		If you find that some options are unavailable, it's probably because the subdocuments are collapsed. Just click the Expand Subdocuments button on the Outlining ribbon.
Merge subdocuments		Select the documents you want to merge together by holding the Shift key and clicking each subdocument's icon in the left hand margin. Then click Merge

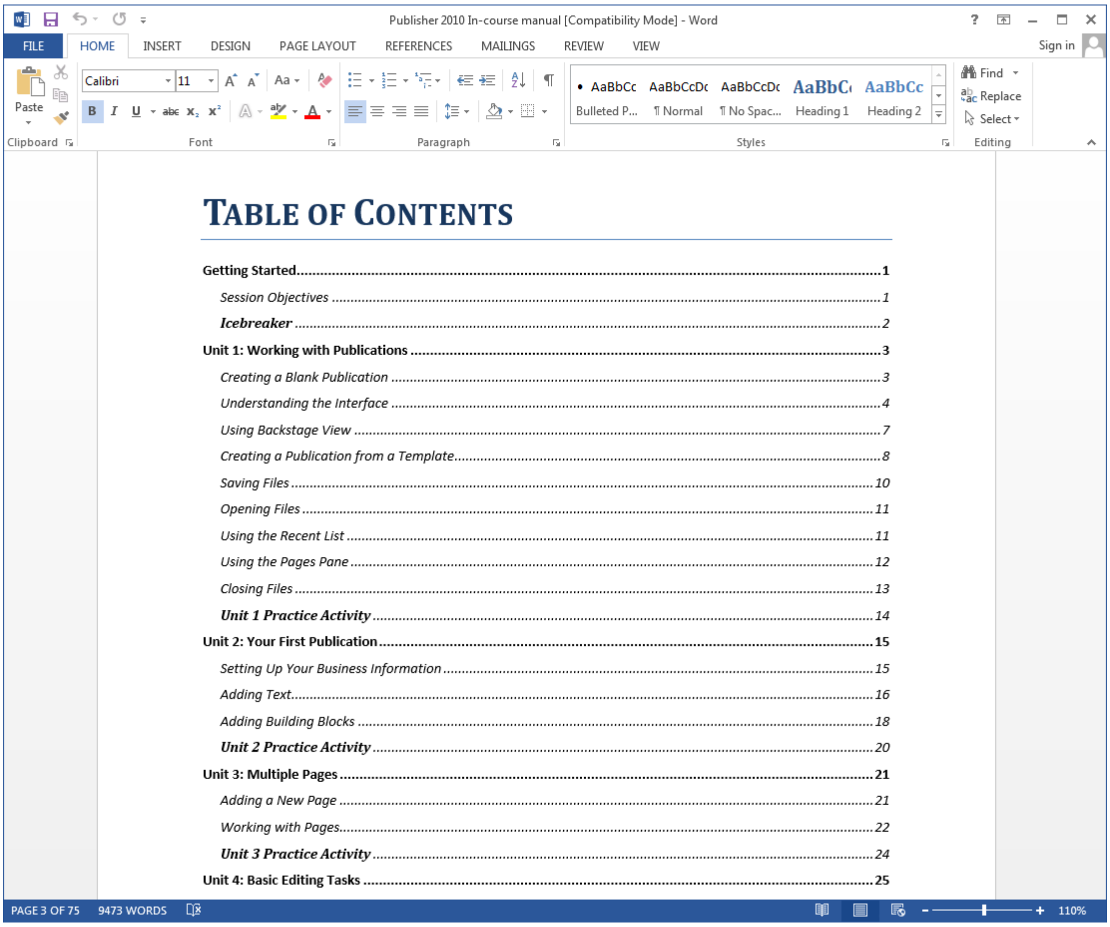
		Subdocuments on the Outlining ribbon.
Split subdocuments		Create a new heading in the subdocument and apply a level to it using the Outlining ribbon. Then click Split Subdocuments on the Outlining ribbon.
Lock the master document so it is read-only		Click Lock Document on the Outlining ribbon.
Unlock the master document for editing		Click Lock Document on the Outlining ribbon.

Creating a Table of Contents

If you've never encountered a table of contents, it's a map to your document. It contains a list of each section in your document and also the main headings within each section indicating which page they begin on. It can be as simple as a list of pages, or as complex as a list of chapters with sub-headings.

Have you ever tried to create a table of contents in your document? If you've entered the page numbers and headings manually, you'll know that it's a huge pain to try to keep everything updated and to keep the page numbers correct.

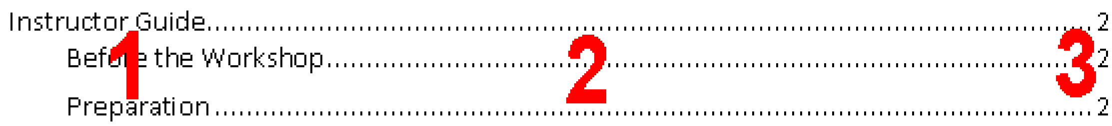
Luckily, Word has a tool to help you quickly and painlessly create and update tables of contents (also known as TOCs). In this lesson, we'll learn about the basics of TOCs and we'll also cover a few ways of creating them.



The ABCs of TOCs

Before we start talking about how to create a table of contents, we need to cover some basics.

First off, there are three parts to a TOC.



1 This is the list of headings in your document.

2 These characters are called tab leaders. They fill in the space between your headings and your page numbers. You can choose different styles of tab leaders or none at all!

3 This is the list of page numbers.

You can hold the Ctrl key and click on any of the headings to go to that part of the document:

The text included in the headings is up to you, so you need to tell Word what you want to include. (The easiest way to do so is to mark it as you write the document. You can mark text using either Outline levels or Heading styles.)

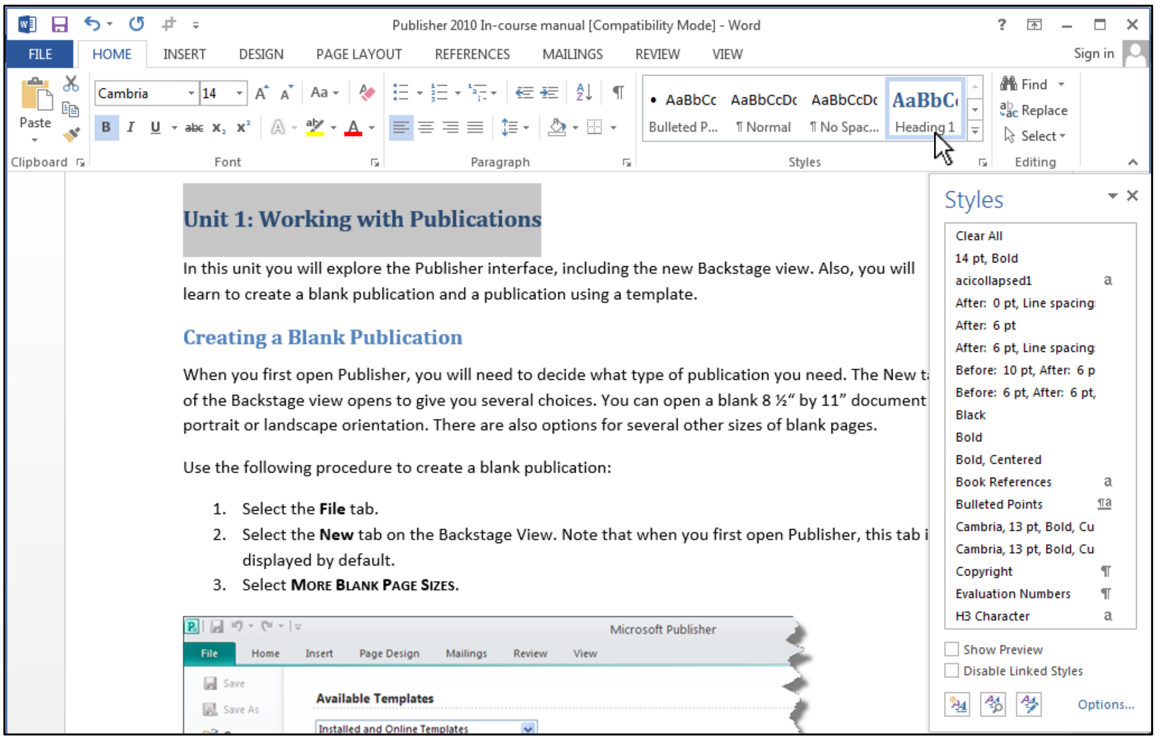
There are some other things to remember about tables of contents in Word:

- You should never edit the table of contents itself (either text or formatting) unless you are creating a manual table of contents. Once the table of contents is updated, those changes will be overwritten.
- If you click in your table of contents, it will appear in a grey box. This grey shading a visual aid to separate the TOCs from other text, and won't be printed.

Marking Text Using Heading Styles

Marking your text using different heading levels will help readers navigate through the table of contents. Word can generate a table of contents automatically, based on the application of Heading styles in the document. In simplest terms, any headings with Heading 1, Heading 2 or Heading 3 styles applied can be included in the Table of Contents when it is generated.

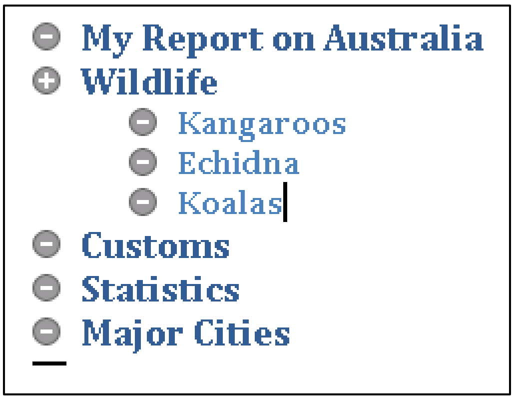
To apply a heading style to text, simply select the text and click a style from the Quick Styles gallery. (You can also click the option button on that group to open the Styles task pane. For more information on styles, see our Word Intermediate manual.)



The Heading Styles will automatically have Outline levels assigned to them. Remember that the text you mark is what will be displayed in the Table of Contents, so it should be concise yet clearly explain what section the reader will be taken to.

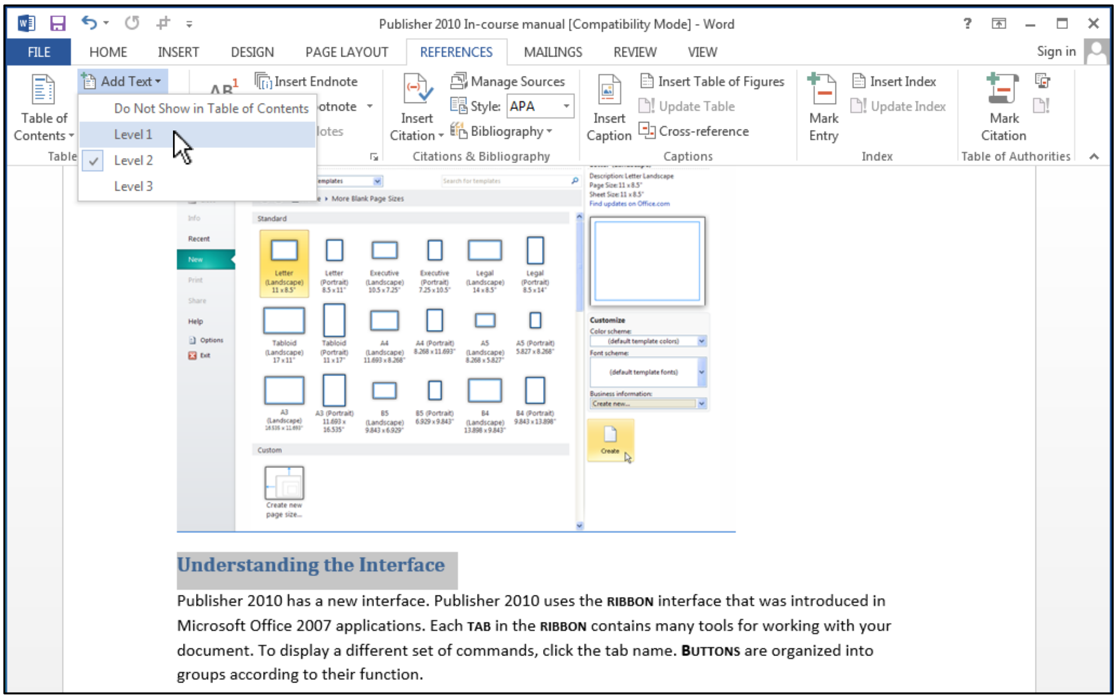
Marking Text Using Outline Levels

Another way to mark up text is using outline levels. First, switch to outline view using the View ribbon or the Status Bar. Then, use the outlining tools to assign different levels to your text.



Marking Text Using the References Ribbon

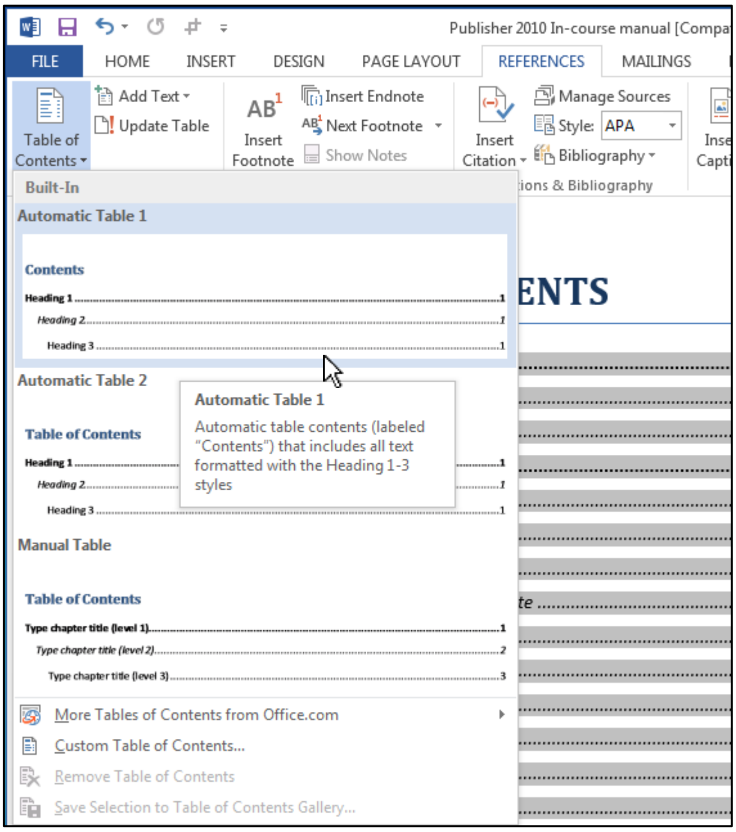
A third way to mark text is to use the References ribbon. Simply select the text that you want, click the References ribbon, click Add Text, and choose the level that you want.



This will mark the text with the appropriate outline level and give it the proper heading formatting.

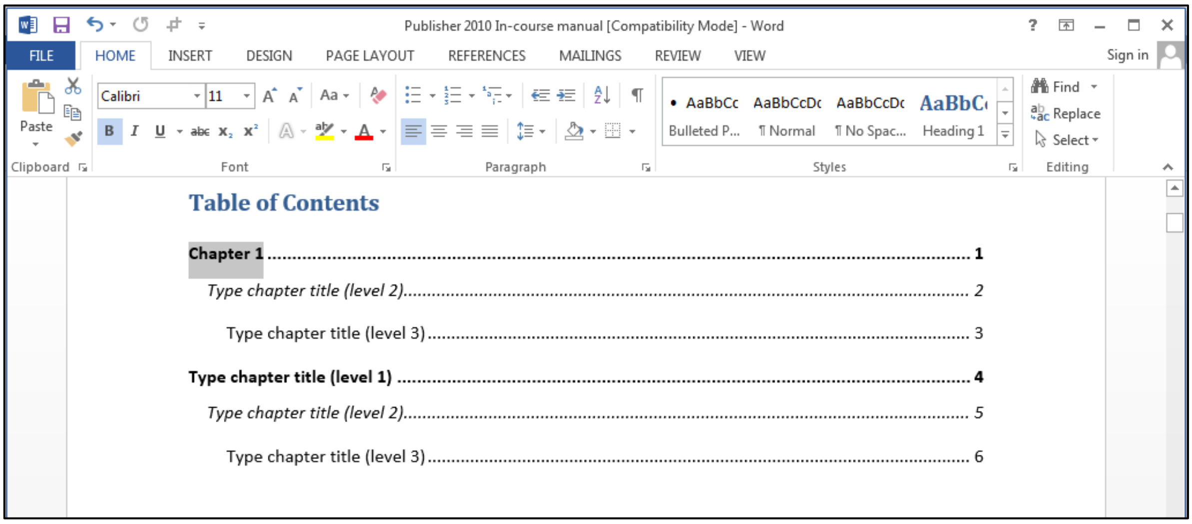
Inserting a Table of Contents

Once your text is all marked and you're ready to create the table of contents, click to place your cursor at the location that you want the table to appear. (This is usually at the beginning of the document.) Then, click the References ribbon, click Table of Contents, and choose one of the entries.



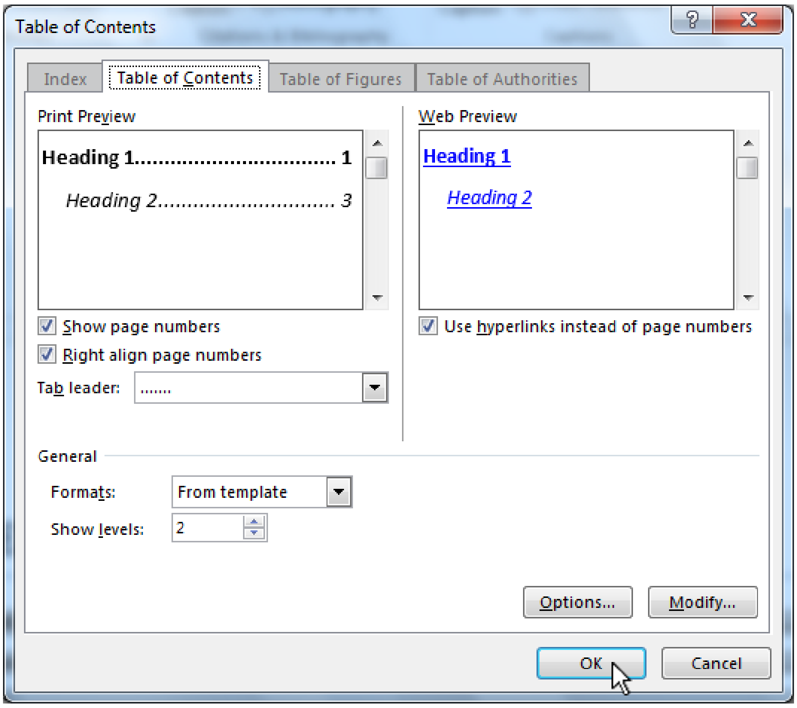
The first two entries are automatic tables, meaning that the headings and formatting are pre-defined. Word will change the text and page numbers to match the headings and corresponding pages in your document.

The third choice, Manual Table, lets you create a table of contents where you can type in the headings yourself.



The problem with the Manual Table is that Word will not know where the headings you type are located, so you must enter the page numbers manually and keep them updated.

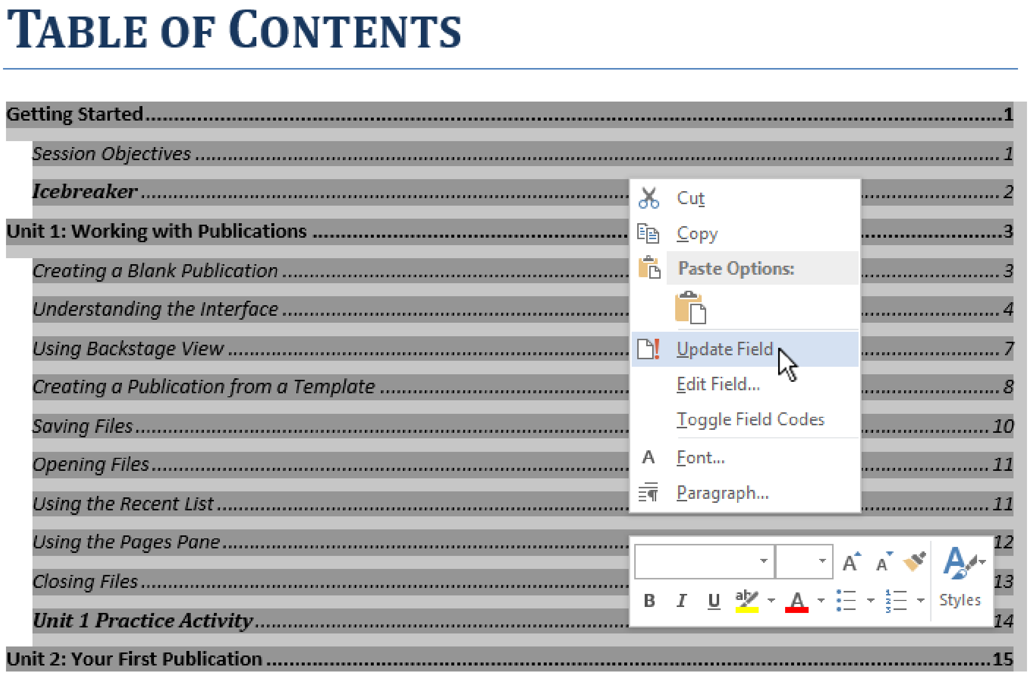
The third way of creating a table is the Insert Table of Contents option at the bottom of the menu. This will open the older-style Table of Contents dialogue, allowing you to customize a dynamic table of contents.



This dialogue allows you to customize every aspect of your table of contents. You can also click the Options button to assign a heading level to a table of contents level, or click the Modify button to format each level. Note that all formatting for dynamic tables of contents should be done here, as updating the table will remove any formatting that you apply in the document.

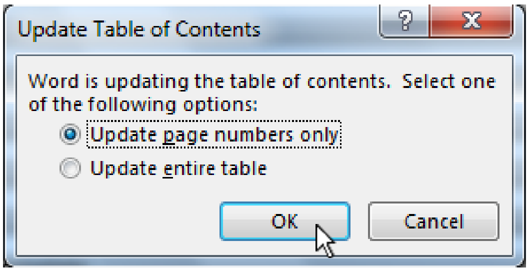
Updating a Table of Contents

Part of the joy of using Word's tools to create your table of contents is that you can automatically update it to reflect changes to your document. Let's say that you've made some changes to your document, and you want the table of contents to reflect the page number changes. There are two ways to update the table of contents. The first is to right-click the table and click Update Field.



A second way is to click to place your cursor inside the table and press the F9 key.

With either of these methods, you may see this dialogue:



If you have just made changes that affect page numbering, choose the first option. If you have added or removed headings, however, choose the second option. Once you click OK the table will be updated.

Creating References within a Document

In the last lesson, we learned that a table of contents can help your readers navigate through your document, and we learned that Word can help you create a table of contents and keep it updated. In this lesson, we're going to learn about some extra ways that you can add references to other points in your document to make it reader-friendly.

Adding Footnotes and Endnotes to a Document

If you've ever written a paper or a thesis, you know that inserting footnotes and endnotes is a key part of that process. For the uninitiated, footnotes or endnotes can be used to tell the reader what source you used for a particular fact or quote. They can also be used to add a comment or a more detailed explanation that doesn't quite fit in with the text. Rather than interrupt your document, a number is placed to refer the reader to a note at the end of the page, section, or document.

To insert a footnote or an endnote:

1. Place the cursor where the footnote or endnote number is to appear in the document text, and go to References/Footnotes group.
2. To insert a footnote, click the Insert Footnote button; to insert an endnote, click the Insert Endnote button.

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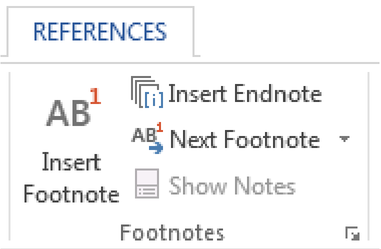

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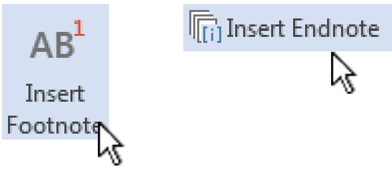
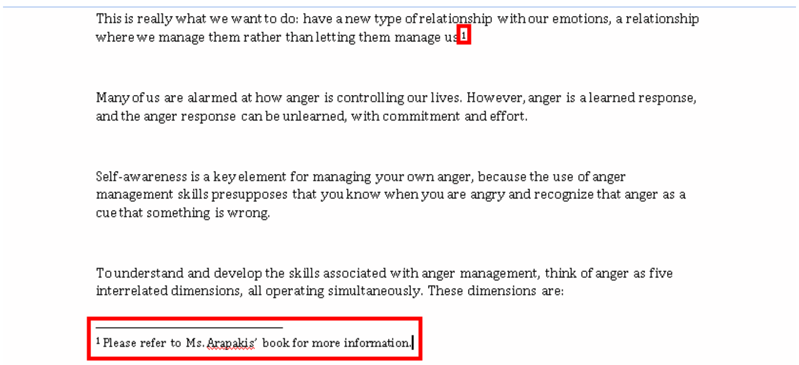


3. The number will then be inserted and you will be taken to the location of the note so that you can type in the information.

❸


Review footnotes or endnotes in a document

1. Go to References/Footnotes group.
2. Click the dropdown arrow to the right of the Next Footnote button.
3. Select from the options provided to proceed directly to the next or previous footnote or endnote in the document.

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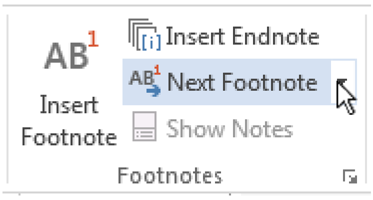

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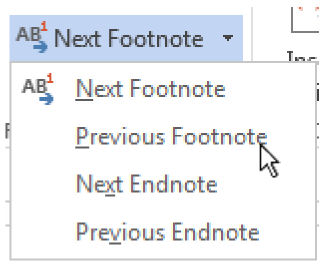
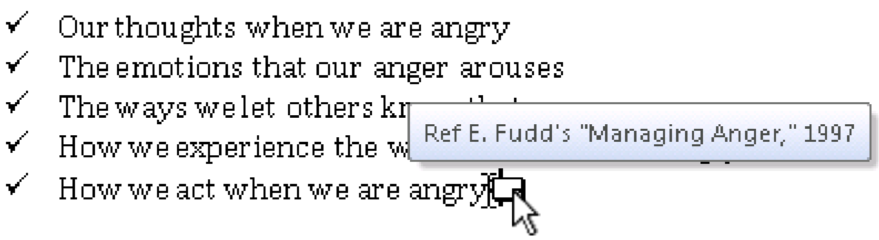


Delete footnotes or endnotes

1. Select the footnote or endnote number from within the document text.
2. Press Delete.

If you want to see the text of a particular note, simply place your mouse over it.



Using Bookmarks

When you read a book, you often place notes to mark items you want to come back to, especially if it's a manual or educational text. Word has a similar feature, allowing you to bookmark places in your document that you want to come back to later. These bookmarks can also come in handy for advanced tools like mail merge and cross-references.

A bookmark identifies a location or a selection of text that you name and identify for future reference. You can also add cross-references to bookmarks.

Creating a bookmark

1. Select the text to be bookmarked.
2. Go to Insert/Links group and click the Bookmark button.
3. Under Bookmark name, type or select a name.
   (Bookmark names must begin with a letter, can contain numbers but can't include spaces.)
4. Click Add. The Bookmark dialogue box closes.

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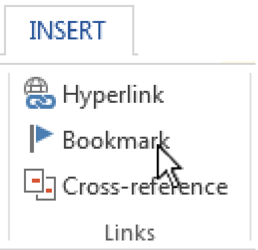

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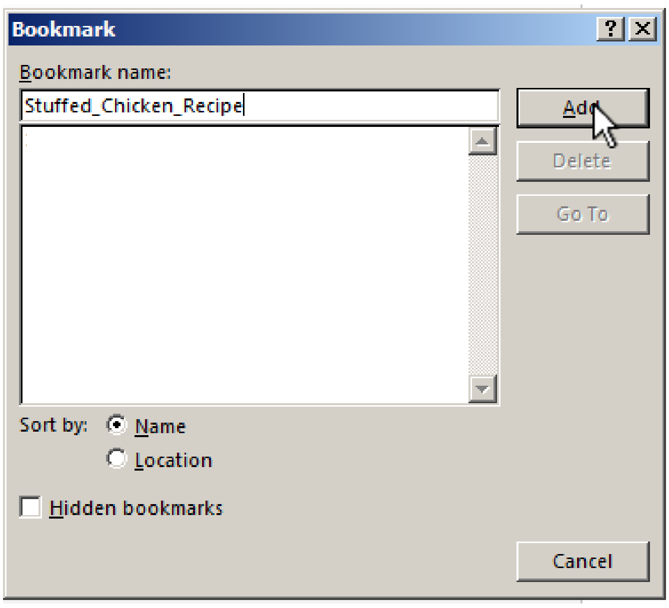

Locating a bookmark

1. Go to Insert/Links group and click the Bookmark button.
2. Select the bookmark name from the list.
3. Click Go To.

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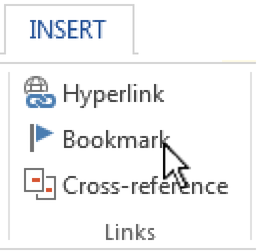

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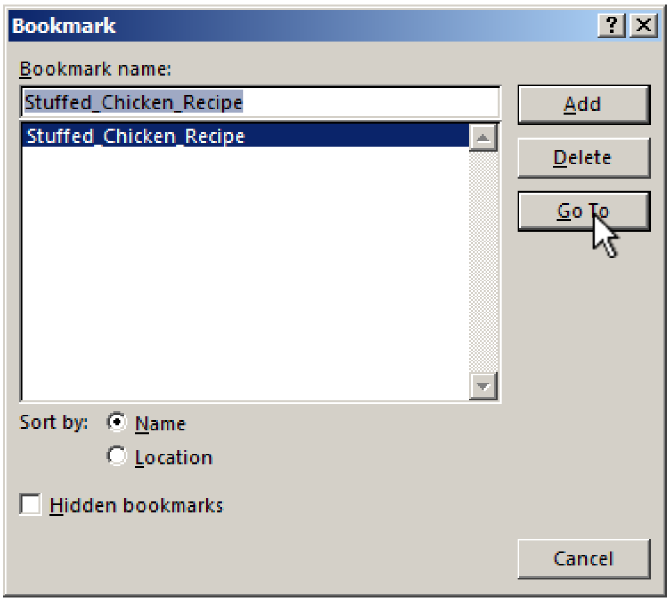
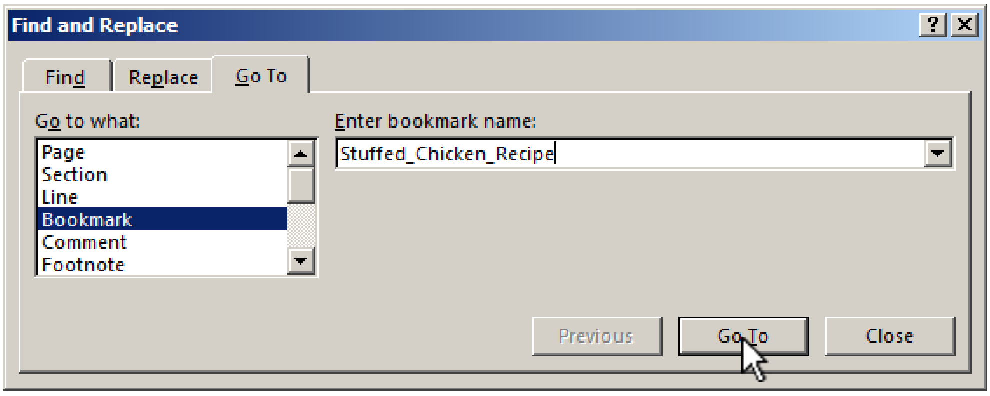


Note: Pressing the F5 key opens the Go To feature in Word, where you can select a bookmark to go to its location in the document.



Using Cross-References

A cross-reference directs a document reader from one point in the document to another. The cross-reference can refer to any of the following: a numbered item, a heading, a bookmark, a captioned table or graphic; a footnote or endnote. Cross-references help your reader navigate through the document by adding links, similar to the links found in a table of contents. The reader can then hold the Ctrl key and click the reference to go to that location.

Creating a cross-reference

1. To add a cross-reference, select the text that you want to contain the link. e.g. a recipe (see [cross reference]).
2. Then, click the Insert ribbon and click Cross-Reference in the Links group, or click the Cross-Reference command on the References ribbon. Under Reference type, select the appropriate item.
3. With either command, you see the Cross-Reference dialogue. On the left hand side, you can choose what type of object you are referring to. Then, you can choose the specific object from the list. (Note that objects such as figures, tables, and equations must have a caption to be in the list.)
4. Once you're ready, click Insert to add the link.

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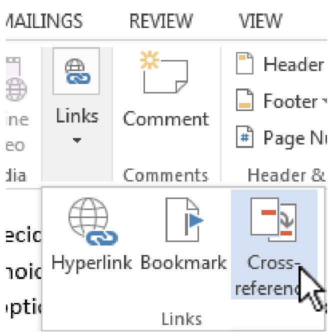

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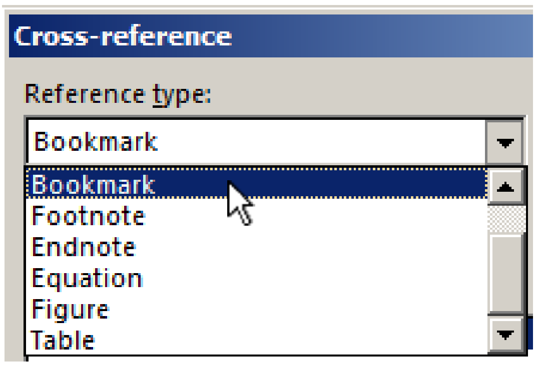

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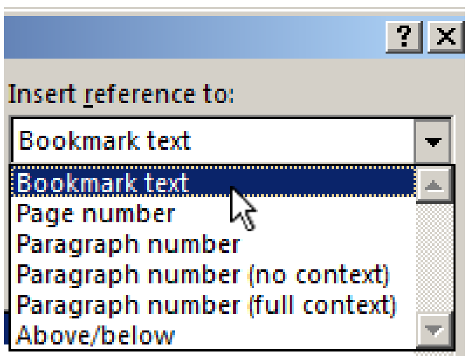

Note that if you change the original reference (for example, the caption) you must update the reference as well. Doing this is easy: just right-click the cross-reference and click Update Field to update the reference as well:

Creating Other Reference Pages

We've already learned how Microsoft Office Word 2013 can help you create and manage bibliographies, footnotes, endnotes, and tables of contents. In this lesson, we'll look at a few more types of reference pages, including indexes, tables of figures, and tables of authorities.

Indexes

An index is like a table of contents, only it's arranged a bit differently. Rather than listing pages in sequential order, an index lists topics, words, or phrases and tells you where to find that topic. This is really useful for long documents, and it saves readers time (and patience).

Marking Index Entries

There are many ways to create an index in Word. To get you started, we're just going to cover the easiest and most commonly used methods. Indexes are like other forms of references: if you use Word to create them, they are automatically updated and they're easy to add to, saving you a big headache.

First, we need to tell Word which words to include in our index.

1. Select the word or phrase from within the document text.
2. Go to References/Index group and click the Mark Entry button.
3. In the Mark Index Entry dialogue box, click Mark to mark the selected occurrence of the word/phrase. To mark all occurrences of this text in the document, click Mark All
   The first section in this box is called Index. It lets you set entries and subentries for each topic. For example, in a recipe book's index you might see an entry for Chocolate, and then sub-entries for Chocolate Cake, Chocolate Chip Cookies, and Chocolate Pudding. Under Options, you can choose what will be listed as the reference for this index entry. You can choose a cross-reference (for example, the reference may say "See Chocolate" for Baked Chocolate Pie), the current page, a page range, or a bookmark. Then, under Page Number Format, you can choose to make your page numbers bold, italic, or bold italics. Once your options are set, click the Mark button to mark the text as an index entry. (You can also click the Mark All button to mark all instances of this text in the document as an index entry.) The dialogue box will stay open so you can select other index entries and click back into the box to repeat the entire process. Also note that once you click Mark, the Cancel button will change to a Close button.
4. With the Mark Index Entry dialogue box open, repeat steps 1 and 3 to continue marking other words/phrases in the document.
5. Click Close to exit the dialogue box.

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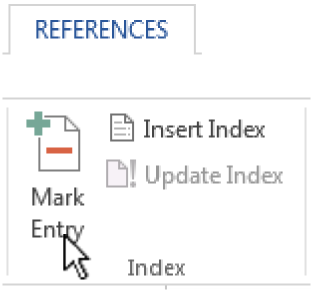
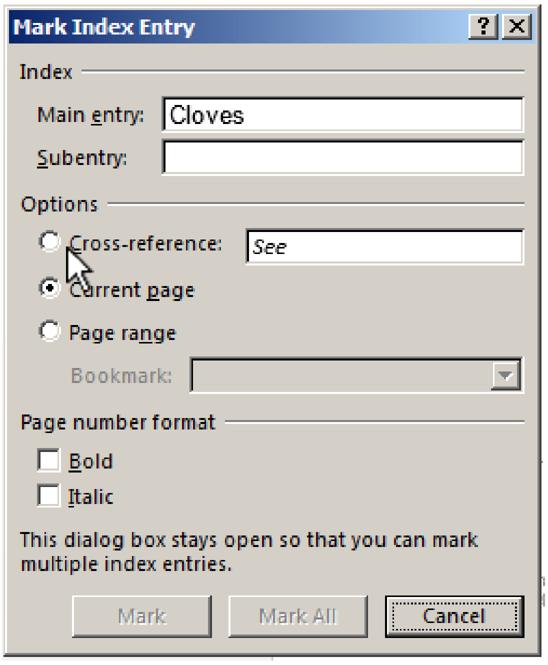
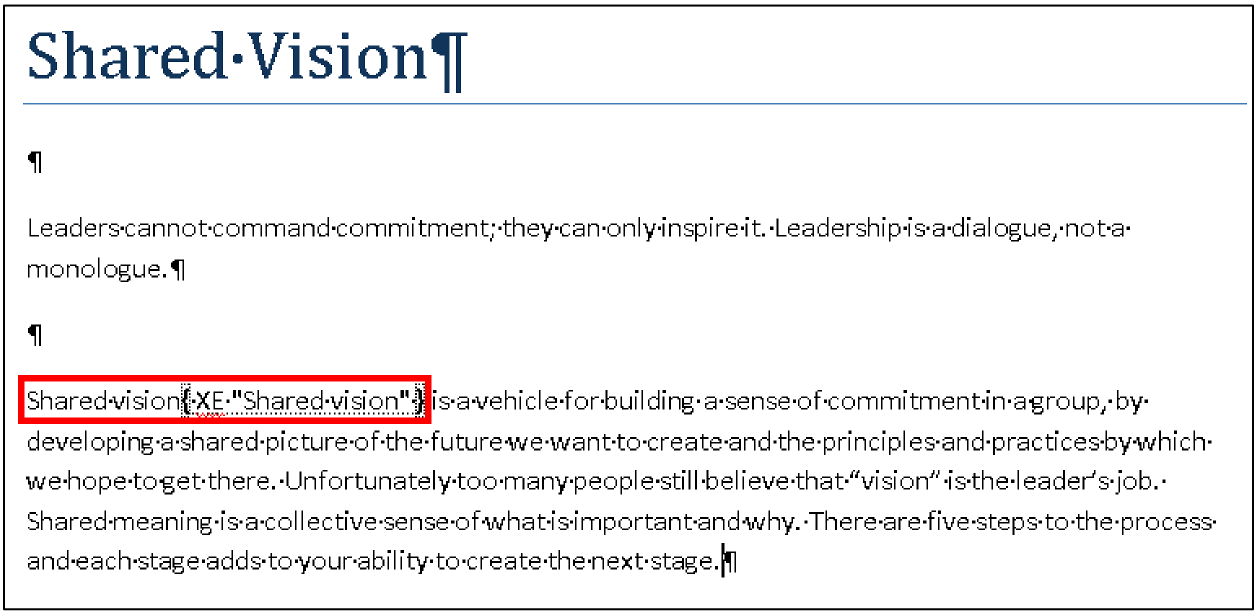
❷ 

❸ 

Once you're done marking all your index entries, you may notice that your document looks a bit different.



This is an indication that paragraph marking has been turned on; you can see that our Index entries are marked with XE and curly brackets. To hide paragraph markings, just click the paragraph icon () on the Home ribbon. (When paragraph markings are hidden, your indexed text will look just like any other text.)

Creating and Updating an Index

Once your text is marked, it's time to insert the index. First, make sure that paragraph markings are hidden. (Remember that you can do this from the Home ribbon.)

1. Position the cursor where the index is to appear.
2. Go to Reference/Index and click the Insert Index button.
   Here, you can control every aspect of your index's appearance. In the main dialogue, you have options to right align the page numbers, choose a tab leader (if you have chosen a right alignment), choose a format, and pick how many columns you want. There are also commands to open the Mark Index Entry dialogue, AutoMark entries via a master list, and modify the index's format. Once your options are set, click OK to create the index.
3. Select settings for index formatting using the Index dialogue box, and click OK.

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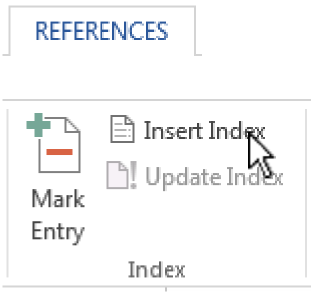

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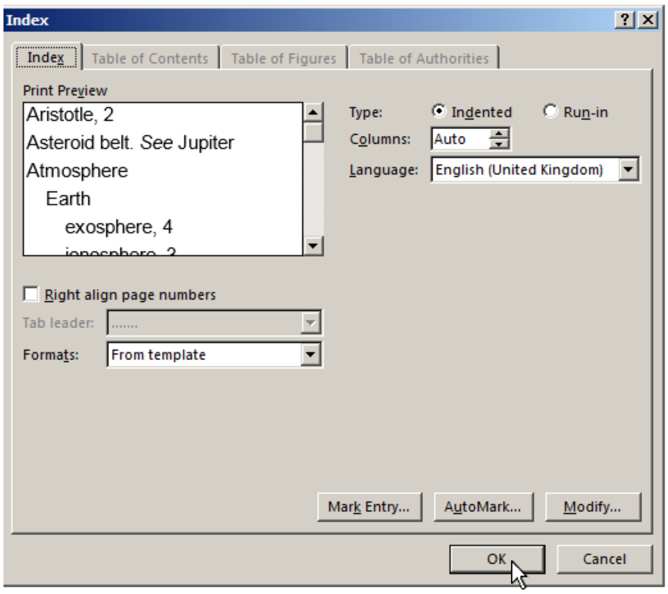
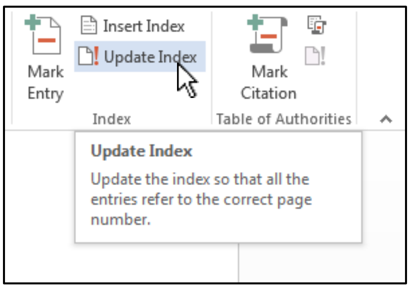


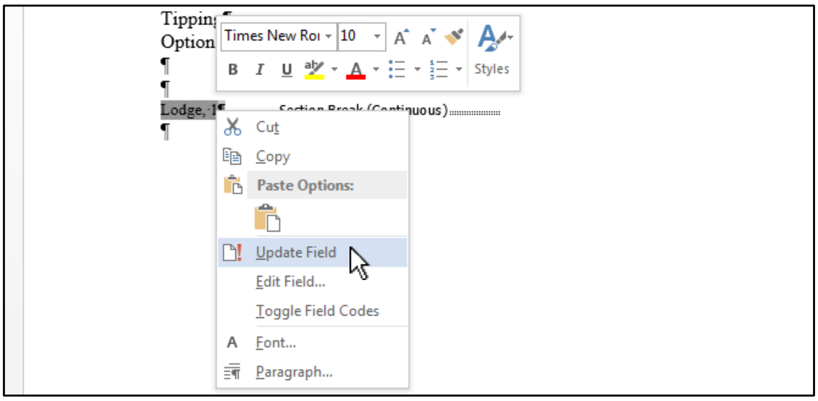
Updating the index

To include additional index entries once the index has been created:

1. Mark the words or phrases to be added to the index (see 'Marking index entries').
2. Click within the existing index.
3. Go to References/Index and click the Update Index button; or press the F9 key.



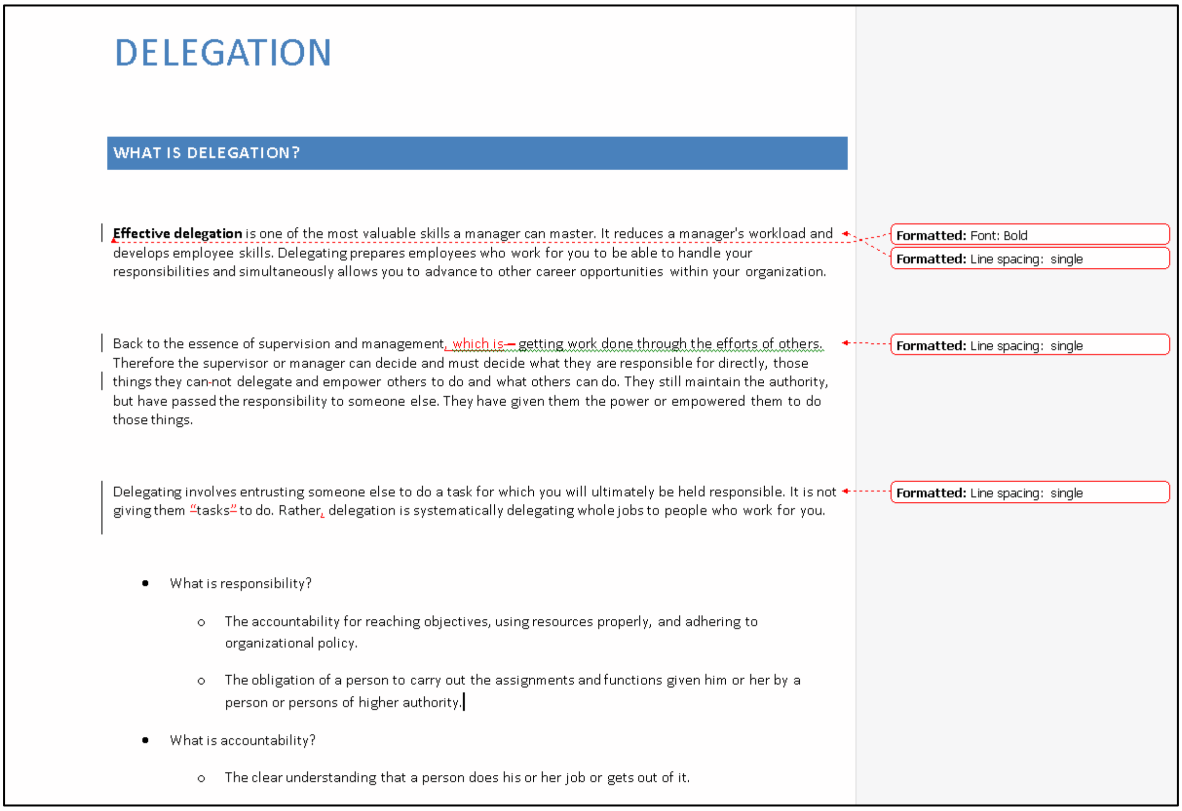
Alternatively, right-click the index and click Update Field,



Managing Document Revision

Tracking Changes

What if you want to do more, such as have a reader remove or add sentences from a document? In this case, you can enable Track Changes, which will record every change (such as insertions, deletions, or formatting) that the editor makes. In this section, we'll learn how to use the Review Pane, how to track changes, how to review changes, and how to control Track Changes options.


DELEGATION

WHAT IS DELEGATION?

Effective delegation is one of the most valuable skills a manager can master. It reduces a manager's workload and develops employee skills. Delegating prepares employees who work for you to be able to handle your responsibilities and simultaneously allows you to advance to other career opportunities within your organization.

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Back to the essence of supervision and management, which is – getting work done through the efforts of others. Therefore the supervisor or manager can decide and must decide what they are responsible for directly, those things they can-not delegate and empower others to do and what others can do. They still maintain the authority, but have passed the responsibility to someone else. They have given them the power or empowered them to do those things.

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Delegating involves entrusting someone else to do a task for which you will ultimately be held responsible. It is not giving them "tasks" to do. Rather, delegation is systematically delegating whole jobs to people who work for you.

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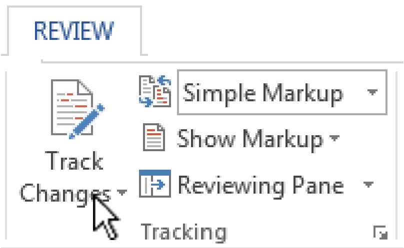
- What is responsibility?
  - The accountability for reaching objectives, using resources properly, and adhering to organizational policy.
  - The obligation of a person to carry out the assignments and functions given him or her by a person or persons of higher authority.
- What is accountability?
  - The clear understanding that a person does his or her job or gets out of it.

Turning Track Changes on

Go to Review/Tracking group and click the Track Changes button, or use Ctrl+Shift+E.
Track Changes is now turned on.



To add a Track Changes indicator to the status bar, right-click the Status Bar and select Track Changes.

Once you have switched Track Changes on, you can work with the document as normal by editing text, formatting text, adding graphics, and using all of Word's other features. However, all of your changes will be recorded in the document. These changes are called markup, as they mark up your document as if you were editing it on paper.

Using Tracking Options and Balloons

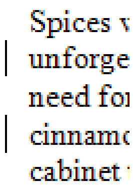
Tracking options allows you to set how tracked changes in the document are displayed.

Typically changes are displayed in the following way:

- Insertions (where additional text is entered) are shown with an underline 

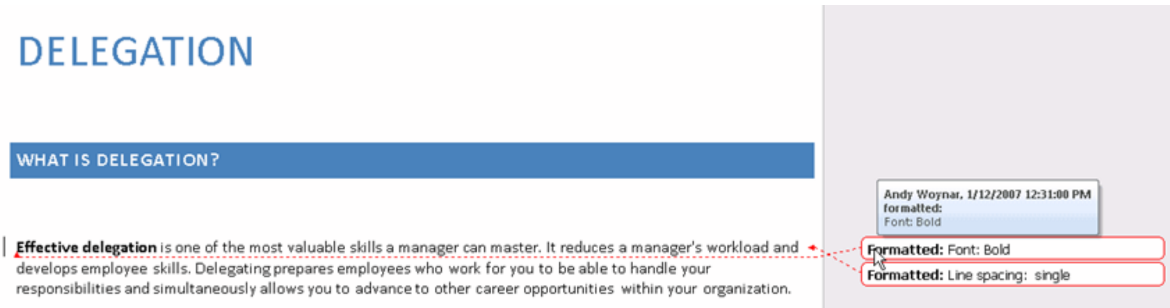
- Deletions (where text is deleted) are shown with a strikethrough 

- Changed lines (marks all changes) are shown as a vertical line to the left of the line or paragraph where a change has been made.

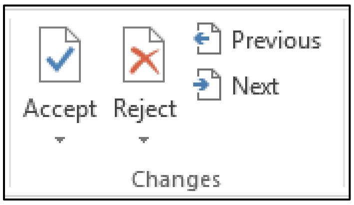


Reviewing Changes

So let's say you've received a document with tracked changes. Now it's time to take a look at what's been done to your document. One way to check out the changes is to place your mouse over any markup item; you will see a pop-up window appear with more details.



The Changes group on the Review ribbon can be used to review, accept and reject tracked changes.



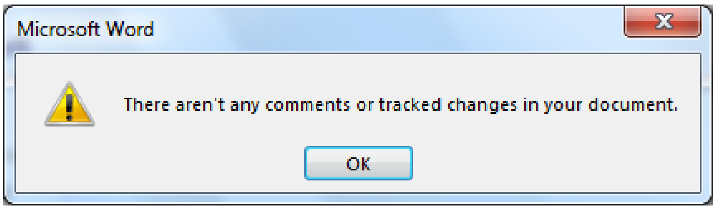
Here's a brief overview of each command in the group.

Accept	Accept the current change and moves to the next change. Drop-down arrow offers options to accept this change, accept the change and move to the next change, accept all changes shown, and accept all changes in the document.
Reject	Reject the current change. Drop-down arrow offers options to reject this change, reject the change and move to the next change, reject all changes shown, and reject all changes in the document.
Previous	Move to the previous change.
Next	Move to the next change.

You can also right-click any markup item to see options for dealing with the change.

Once you accept a change, that text becomes part of your document and any markup (including vertical lines in the left margin) is removed. If you reject the change, the change and its associated markup is removed.

When all changes have been reviewed, the following message appears to indicate that there are no tracked changes left in the document.



Turning Track Changes off

When you turn off change tracking, you can revise the document without marking what has changed.

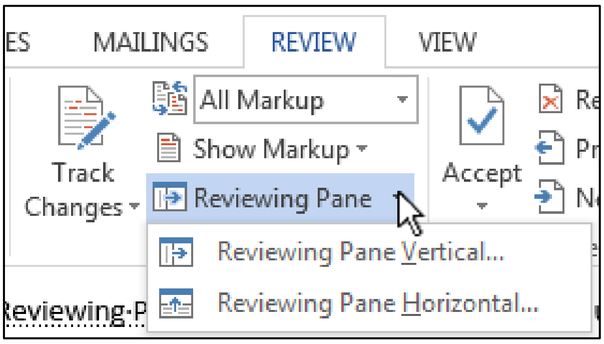
To turn off Track Changes:

1. Go to Review/Tracking group and click the Track Changes button; or
2. Use Ctrl+Shift+E; or
3. Click the Track Change indicator on the status bar once.

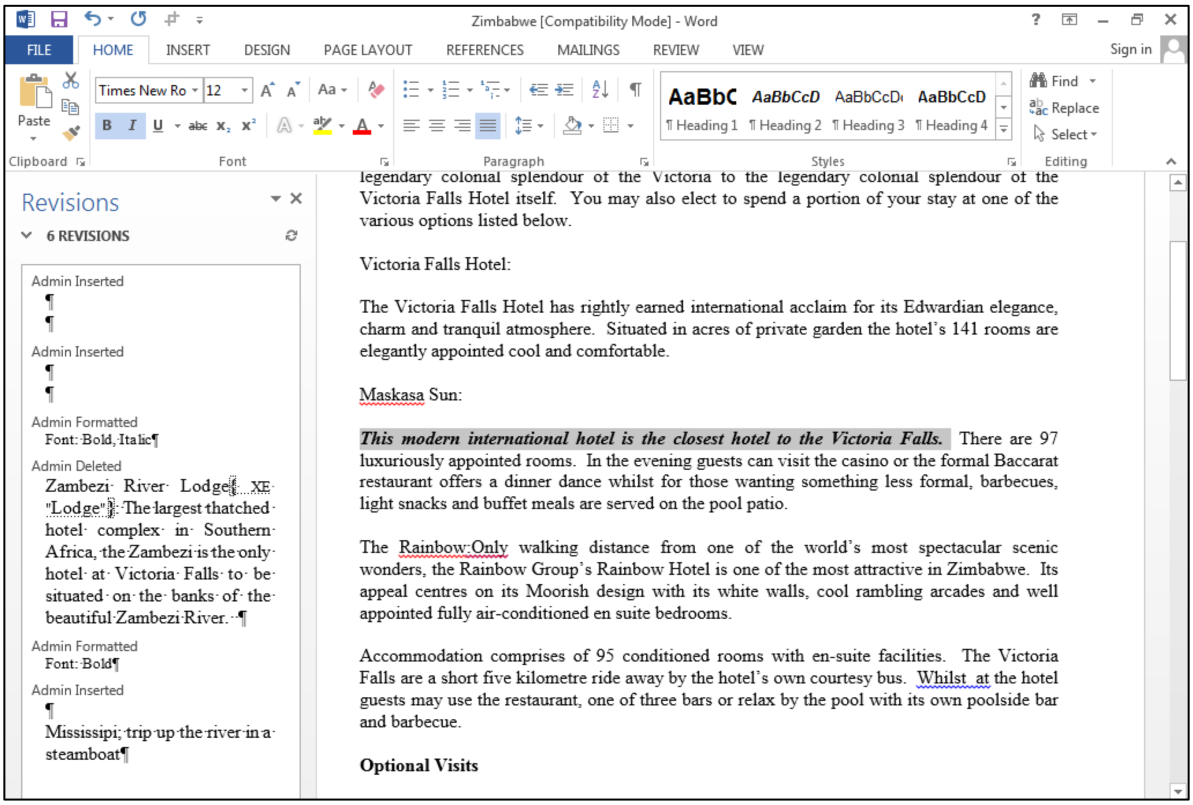
Note: turning off the Track Changes feature **does not** remove any changes that have already been tracked. To remove tracked changes, use the Accept and Reject commands on the Review tab in the Changes group.

Using the Reviewing Pane

The Reviewing Pane is another tool that you can use to review changes made to your document. To turn it on, click the arrow next to the words Reviewing Pane on the Review ribbon and choose whether you want the pane to be horizontal or vertical.

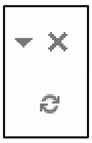


For our purposes, we'll place it vertically.



As you can see, this pane summarizes and categorizes every tracked change made to the document. Simply click any change to go to it and select it.

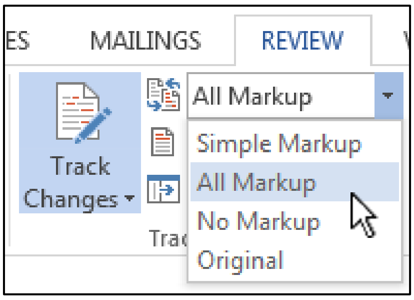
Note the three commands at the top of the pane.



These commands hide the summary; close the pane; and update the revision count respectively.

Changing the Changes that You See

Whether you're the reviewer or the owner of the document, there are a few ways to change how you view your document. The first way is to use the Display for Review menu on the Review ribbon.

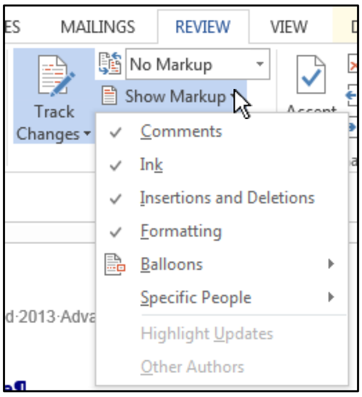


This menu contains four options:

Simple Markup	Simple Markup provides an uncomplicated view of your document but shows indicators where tracked changes have been made.
All Markup	Shows all comments and changes on top of the original document. Insertions are listed before deletions.
No Markup	Shows the document as if all comments and changes have been accepted.
Original	Shows the original document with all changes and comments hidden.

The important thing to remember about these choices is that they do not remove any changes or comments. They may temporarily hide markup, but the markup is still there. These changes will also not affect reviewer settings.

The same thing applies to the Show Markup menu. You can use this menu to control what markup elements are displayed in your document, but even if you hide a markup element it is still present in your document.



Let's take a closer look at this menu. This menu is a bit different than others; you check items to show them and uncheck them to hide them.

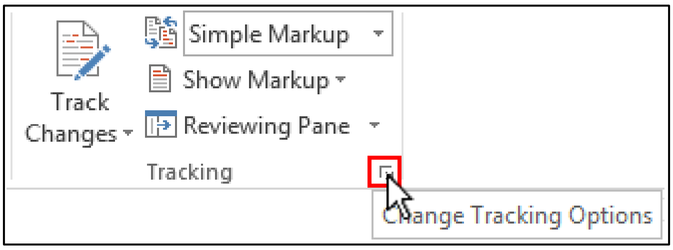
Comments	Shows or hides comments.
Ink	Shows or hides ink markings (made by people with Tablet PCs or other handwriting devices).
Insertions and Deletions	Shows or hides all insertions and deletions.
Formatting	Shows or hides all formatting changes.
Balloons	Highlights the margin area where balloons appear.
Specific People	Shows or hides certain reviewers.

You can use these options to control what markup you see. For example, let's say your assistant John told you that he added a really important part to your document. You can uncheck all items except Insertions and Deletions, and then uncheck all reviewers except for John. This will show you all of the insertions and deletions that John made. Don't forget, though, to re-check all of the options before you "finish" your document!

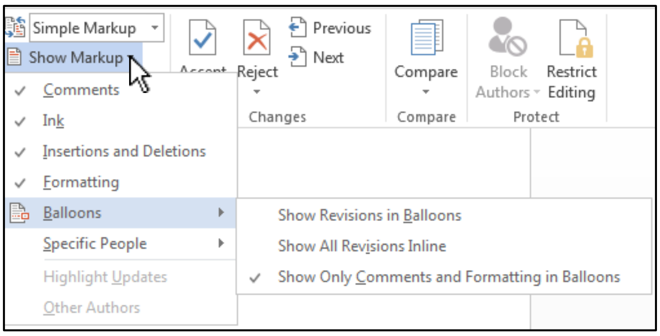
Change Tracking Options

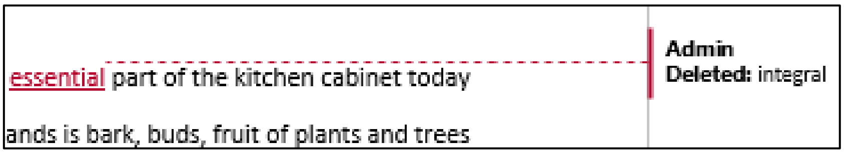
To change how tracked changes are displayed:

1. Go to Review/Tracking group and select Change Tracking Options.



You can also opt to have changes displayed in balloons which appear outside of the document text. Options for display of balloons can be changed using the Show Markup button.

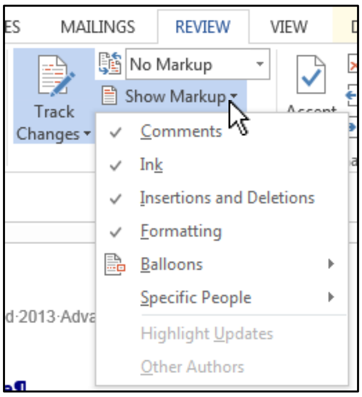




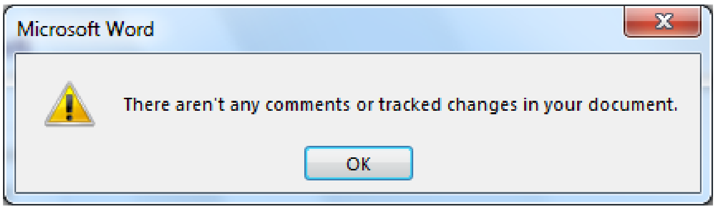
Finishing Your Document

If you think your document is finished and ready to distribute, hang on a moment! Remember that checking or un-checking an item from the Show Markup menu doesn't remove it; only accepting or rejecting a change removes the markup. You need to make sure that there aren't any hidden changes lurking around, waiting to embarrass you.

As part of your final check, you should click the Show Markup menu and make sure everything is checked. You'll also want to click Reviewers and make sure all your reviewers are checked too.

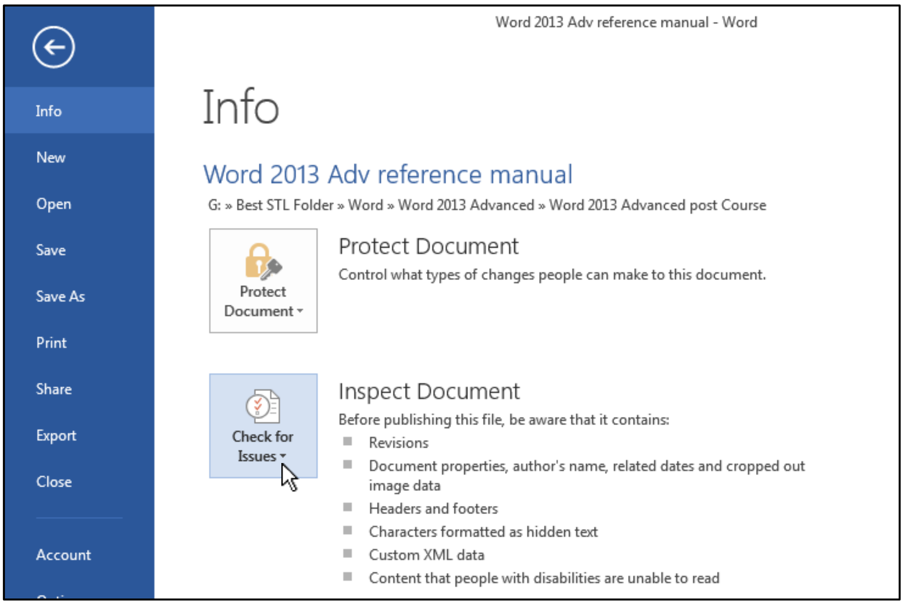


Then, click to place your cursor at the start of your document and click the Next button on the Changes group of the Review ribbon. You should see a message saying that there are no further changes or comments to review.

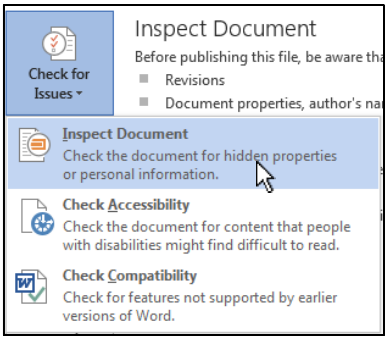


Lastly, it is recommended that you carry out a last thorough inspection of your document. To do this:

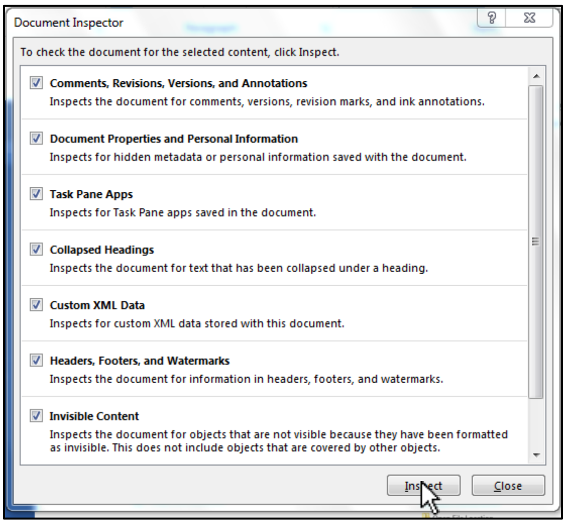
1. Go to File tab
2. Select the Check for Issues dropdown in the Backstage view.



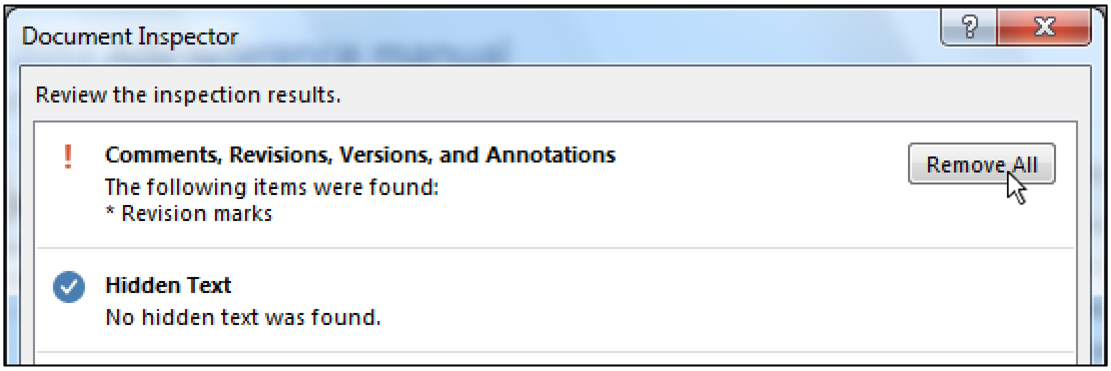
From the options click Inspect Document.



Ensure the appropriate items are checked and click Inspect.



If any tracked changes or comments remain in your document, you will be informed and given the opportunity to remove them.


Document Inspector
Review the inspection results.
Comments, Revisions, Versions, and Annotations
The following items were found:
* Revision marks
Remove All
Hidden Text
No hidden text was found.

Working with Multiple Versions of Documents

Let's say that you've sent a document off to a co-worker to be edited with tracked changes. However, instead of using tracked changes, they simply edit the document. Luckily, Microsoft Office Word 2013 offers many tools to help you deal with multiple versions of documents, including comparing documents, combining documents, and viewing source documents. We'll also look at protecting your documents to make sure the right changes are made.

Comparing Documents

To compare two documents against each other:

1. Go to Review/Compare group, click the Compare button and select the Compare option.
2. Select the Original document and the Revised document at the top of the Compare Documents dialogue box. Select the Comparison Settings and Show Changes options you wish to use, and click OK.
3. The original, revised or new document shows, with changes to or from the original marked as tracked changes.

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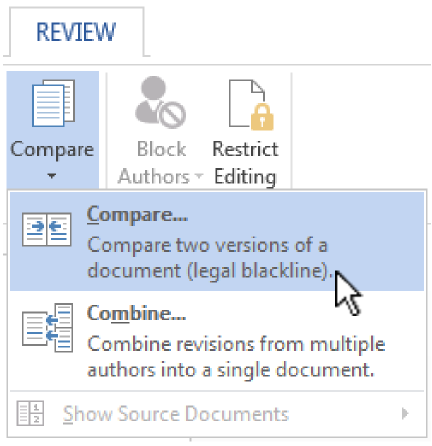

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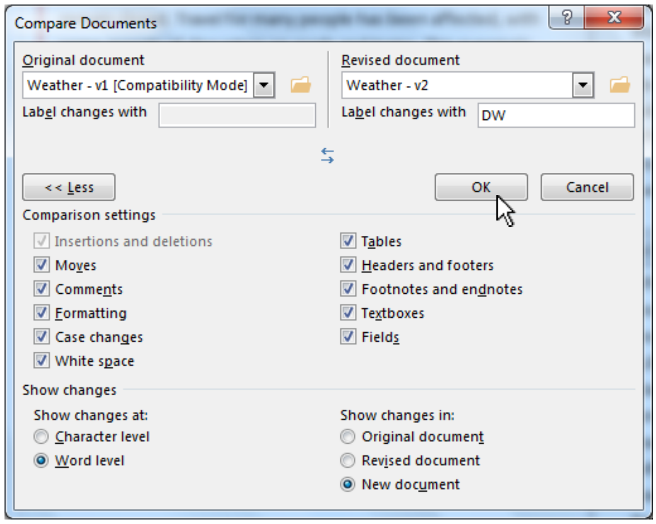

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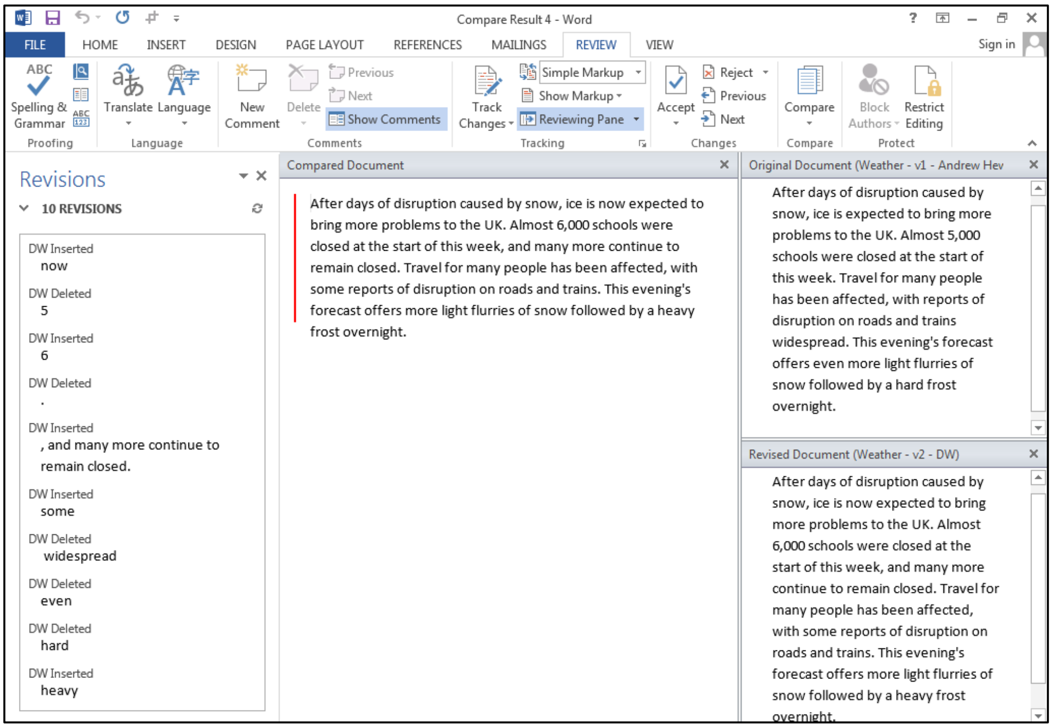

On the left hand side, we can see the Reviewing Pane, which details every change that was made. On the right hand side, we have the two unchanged documents. In essence, the document in the middle pane (Compared Document) shows the original document as if tracked changes had been made. Simply navigate through the document and reject or accept the changes.

4. If desired, use the Show Source Documents button in the Compare group to change the display of documents on screen.

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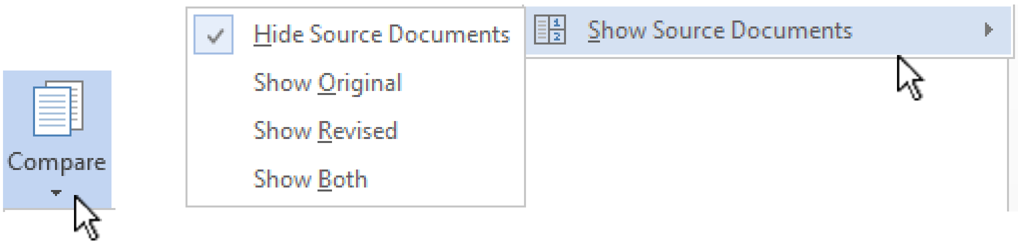
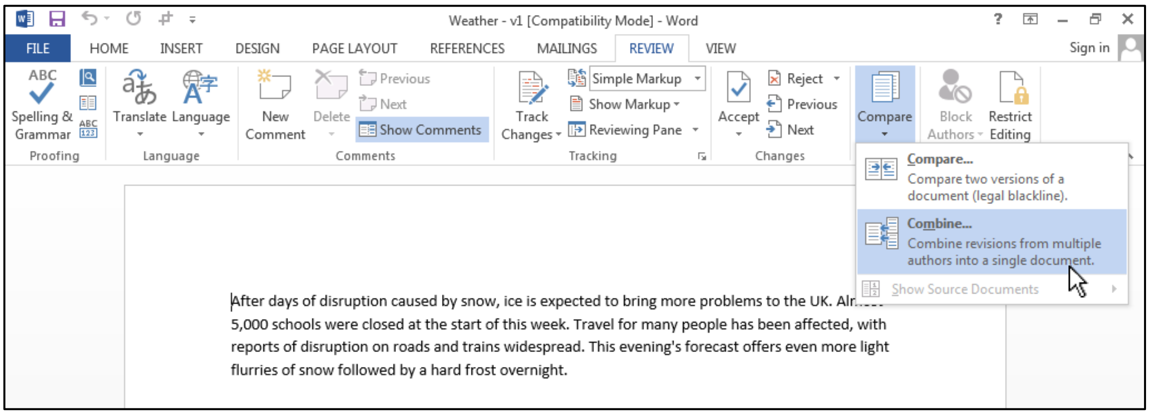


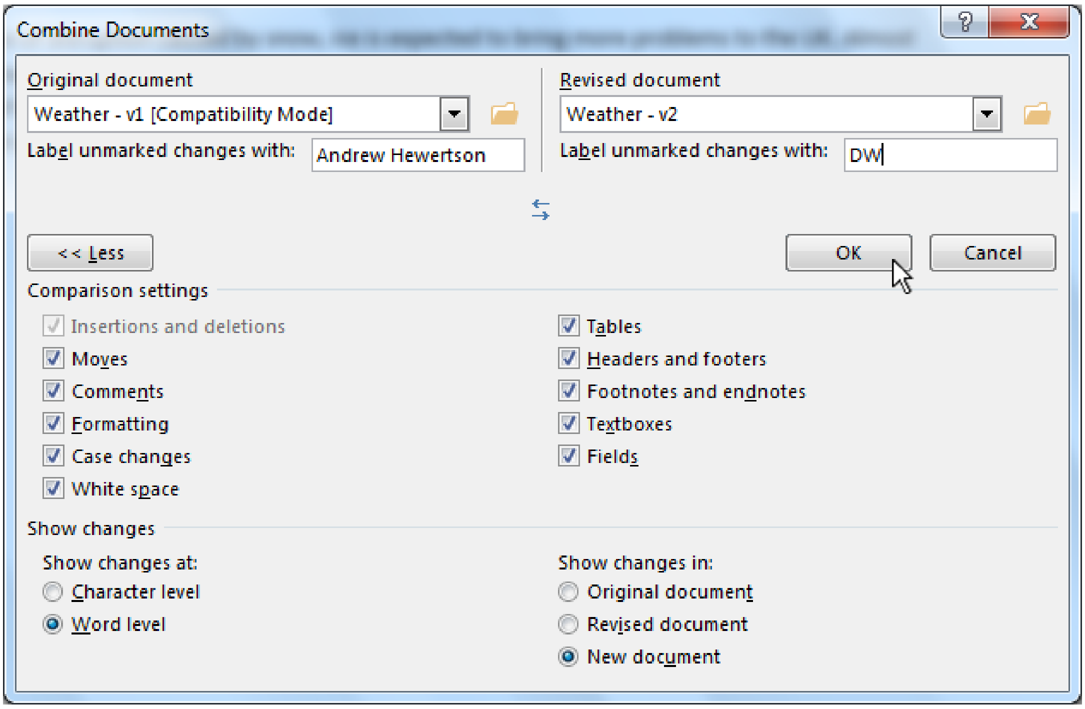
Combining Documents

Let's say that you have sent a document out for revision. However, this means that you now have multiple copies of the same document, each with their own comments and revisions.

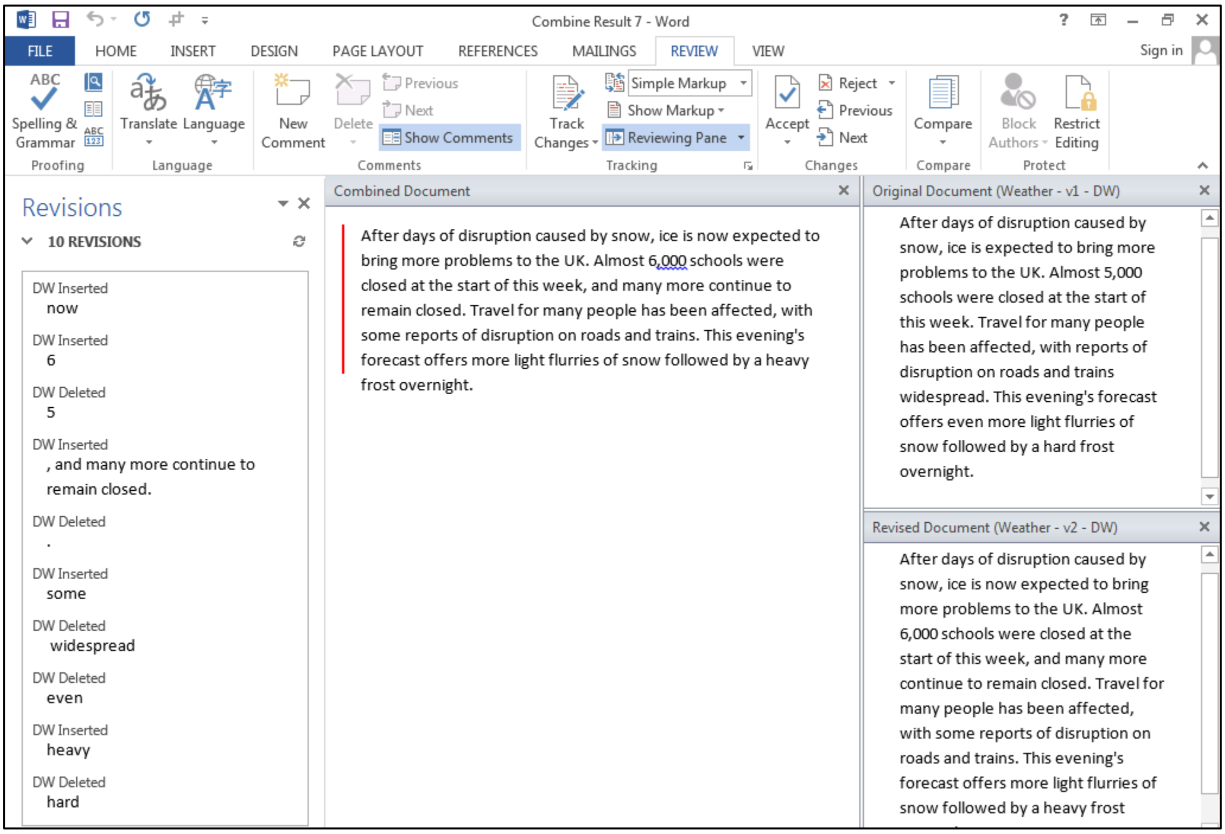
To combine these revisions into one document, open both documents. Then, click the Review ribbon, click Compare, and click Combine.



Then you will see a dialogue very similar to the Compare dialogue. Simply choose your documents from the drop-down lists and click OK. (Note that you can see more options by clicking More.)



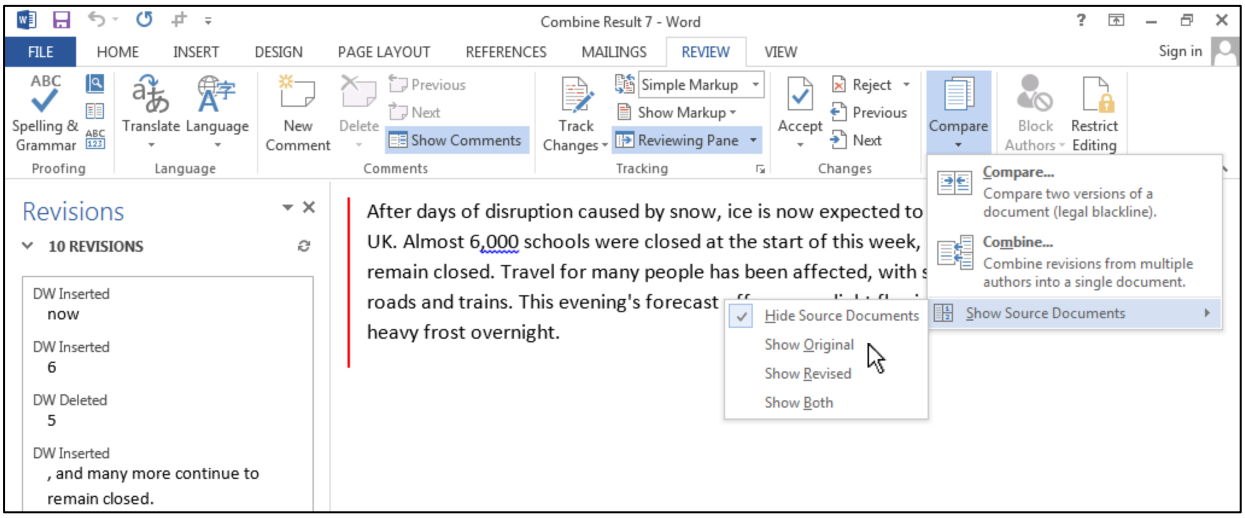
The results that you will see are very similar to when we compared documents.



On the left, you have the Reviewing Pane which lists all the changes. In the middle pane, you have the document that you chose as original with both sets of comments combined. To the right, you have both original documents, unchanged. You can now work with the document in the centre pane.

Showing the Source Documents

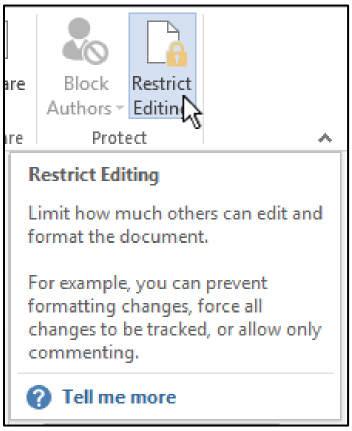
So let's say that after combining or comparing documents, you close the original documents so that you have more space to edit the new document.



If you later change your mind and want to see the source documents, just click the Show Source Document command on the Review ribbon. Here, you can choose to hide the source documents, show the original document, show the revised document, or show both.

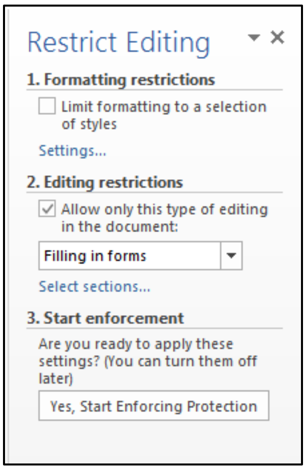
Protecting Documents

The last command on the Review ribbon that we're going to look at is Restrict Editing.



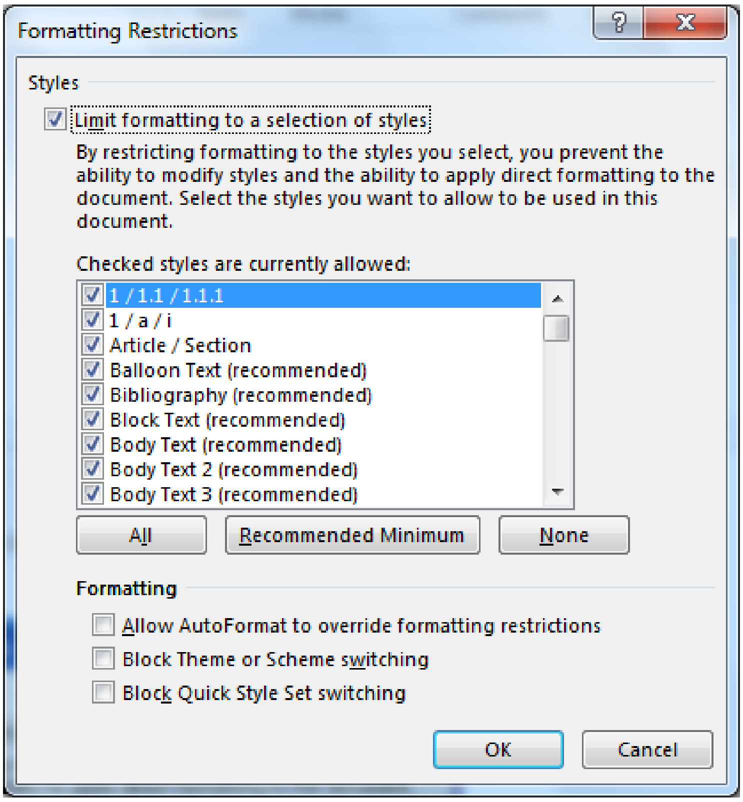
To protect your document, click the Restrict Editing Command in the Protect group.

This will cause the Restrict Editing Pane to display.



There are three steps to this task pane. You can choose any options in Step 1 or 2, and then finalize your choices with Step 3.

The first step lets you limit formatting to a certain set of styles. Once you check the box, you can click the Settings button to check styles that you want to be used in the document and uncheck those that you don't want people to use. You can also click the All, Recommended Minimum, or None buttons to check any, all, or a minimum of styles.



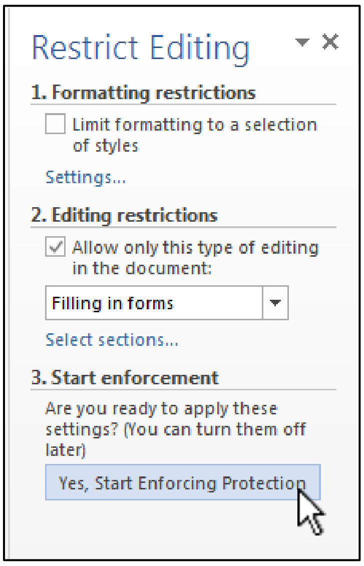
The bottom of the dialogue also offers you options to enable or disable AutoFormat, schemes, themes, and style sets. Once you've put your restrictions in place, click the OK button to apply them.

Step 2 of the Protect Document task pane lets you allow only certain types of editing in the document. You can choose from:

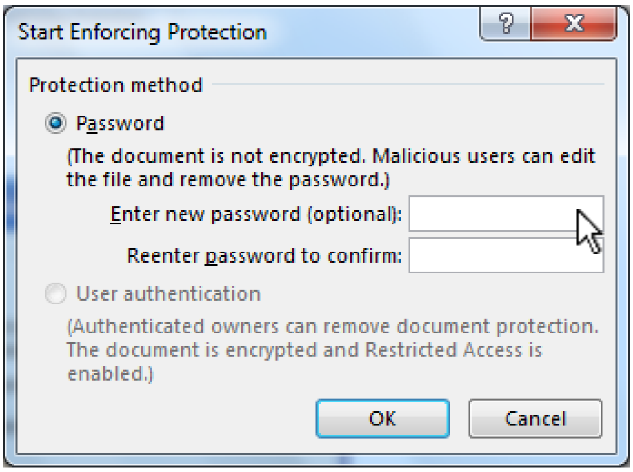
- No changes (read only)
- Tracked Changes
- Comments
- Filling in forms

Depending on the option you choose, you may have additional options to specify. For example, if you choose “Filling in forms” you’ll have options to unprotect certain sections. If you choose No Changes or Comments, you’ll be allowed to set exceptions for these rules. (This exception list is most effective on a network; it allows you to list users who will be able to freely edit the document.)

Once you’re done setting your restrictions, click the button in Step 3: Yes, Start Enforcing Protection.



You will then see this dialogue:

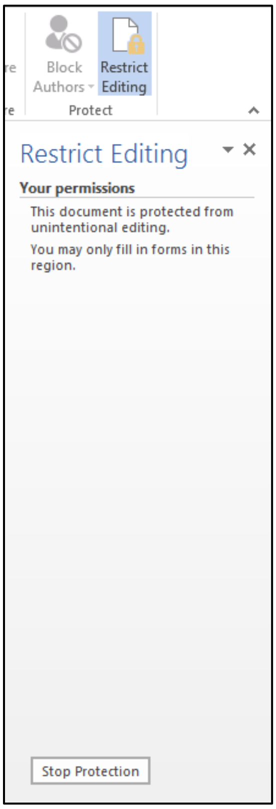


The Start Enforcing Protection box offers two protection methods. No matter what environment you’re in, you should have the option for password. You can enter a password that will be required for users to remove document protection, or you can leave this field blank if you don’t want a password to apply. Without a password, however, anyone can unprotect the document and edit it freely.

If you're on a network, you may have the option to protect by user authentication. If you require sophisticated document protection and encryption, you may want to talk to your system administrator to see if this option can be made available for your organization.

If you've received a document that has these restrictions, you can click the Restrict Editing button. This will open the Restrict Editing task pane so you can see what those restrictions are.

To remove document protection, click the Stop Protection command in the Restrict Editing task pane. If you chose to protect your document with a password, you will be required to enter it at this time. If not, the document will simply be unprotected.



Macros

If you frequently use the same series of commands, you'll want to get to grips with macros, which are several commands grouped together. This lets you perform an entire series of actions just by running that macro.

Although you can create a macro using Microsoft's Visual Basic Editor, in this section we're going to focus on creating a macro using Word's macro recorder. At the end of the lesson, we will take a quick look at using the Visual Basic Editor to edit a macro.

The Developer Ribbon

Tools for creating macros are accessed through the Developer ribbon. If the Developer ribbon is not visible at the top of the Word 2013 screen, do the following.

1. Click the File button and then click Options.
2. In the Customise Ribbon category, check "Developer" and click OK.
   The Developer Ribbon appears at the top of the screen to the right of the other ribbons.

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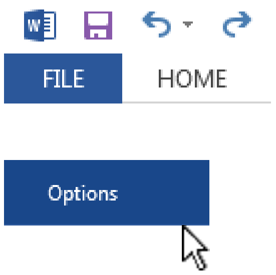

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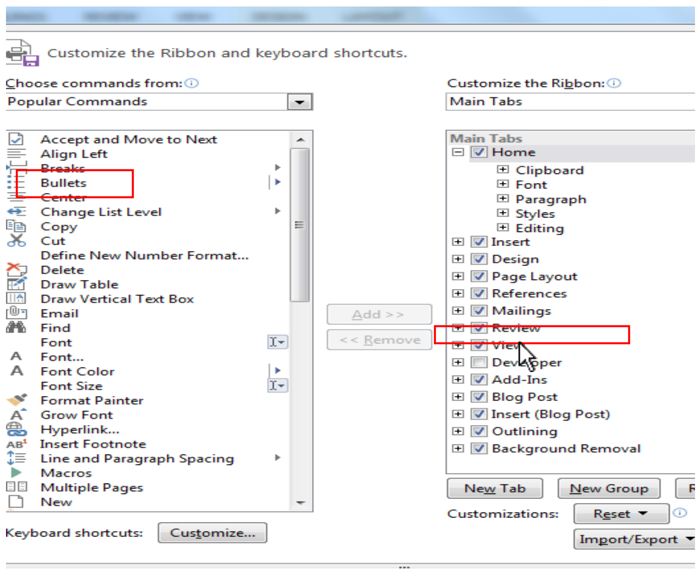
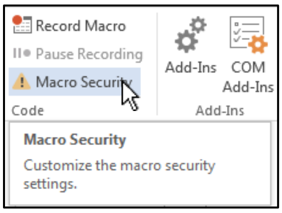


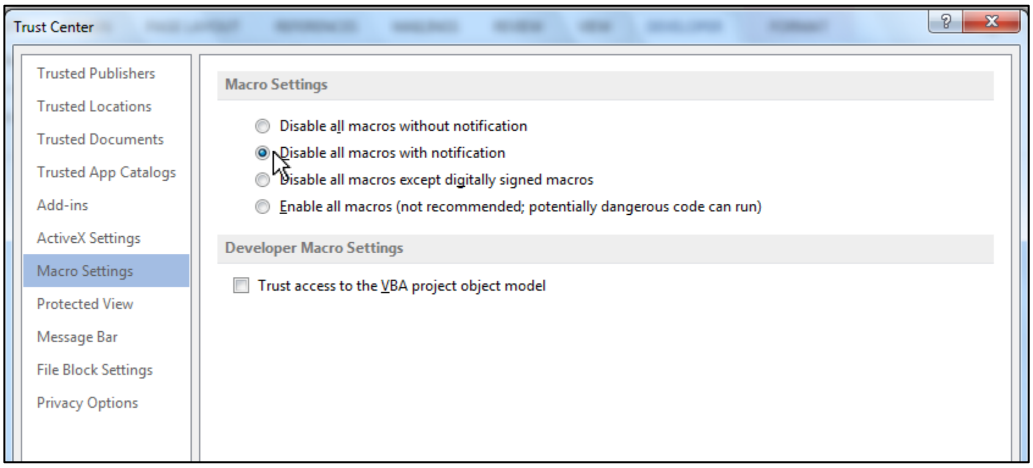
Setting Macro Security

If you're going to be using macros, you will want to make sure your security level in Word doesn't prohibit this. As macros can contain malicious code (such as a virus), Word lets you choose how to deal with them.

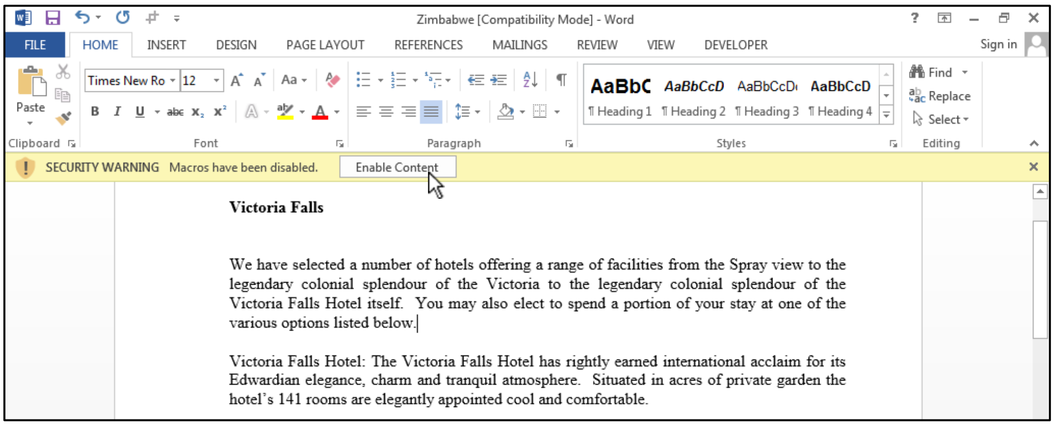
To access macro security options, click the Macro Security command in the Code group of the Developer ribbon.



You will then see the Macro Security section of the Trust Center open. (You can also access security options through the Trust Center section of the Options dialogue.)



You can see that you have four security levels to choose from. The recommended level is “Disable all macros with notification.” This way, if you open a document containing a macro, you will be notified via the message bar.

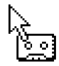


You can click Enable Content on the message bar to choose whether or not to run the macro.

As well, macros are not supported in the default Document (.docx format). Documents containing macros must be saved as Word Macro Enabled Documents (.docm format, the “m” indicating that the format supports macros).

Recording a Macro

Let's say that after you complete a document, you always add a watermark and run a spell check. Rather than repeat those commands over and over, you can create a macro to do the tasks for you. Note that not all commands can be recorded, including many formatting commands.

1. Go to Developer/Code group and click Record Macro or go to View/Macros group and click Record Macro.
2. In the Record Macro dialogue box, enter details for the macro.
   You will be prompted to name the macro, optionally assign it to a button or keyboard shortcut, choose where it is stored (all documents or just the current one), and enter a description (optional). Note that the name cannot have any spaces or special characters.
3. Click OK. Word starts recording the actions you are performing. Your cursor will then have a small tape recorder attached to it, indicating that all actions are being recorded. 
4. To stop recording your actions, go to Developer/Code group and click the Stop Recording button.

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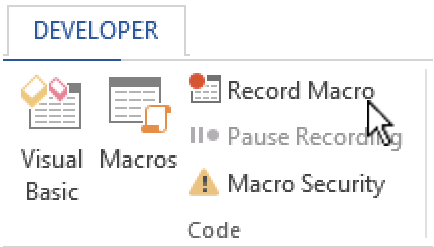

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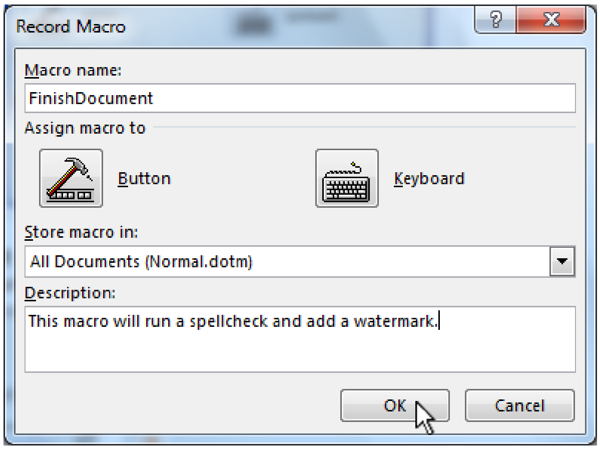

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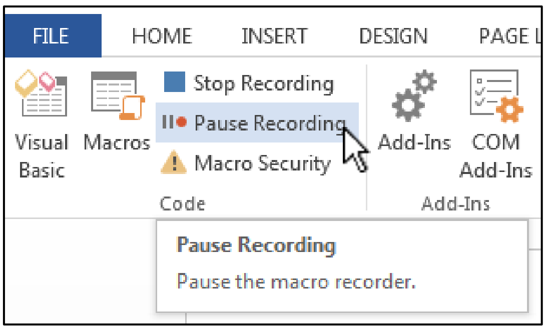
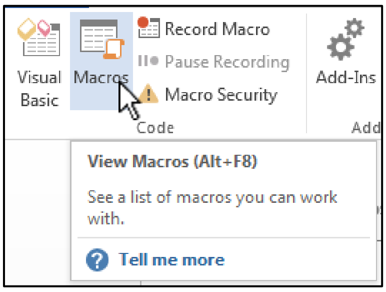
If in the process of recording a macro, you need to perform an action that you don't want recorded, click Pause Recording on the Code group of the Developer ribbon or on the Macros group of the View ribbon.

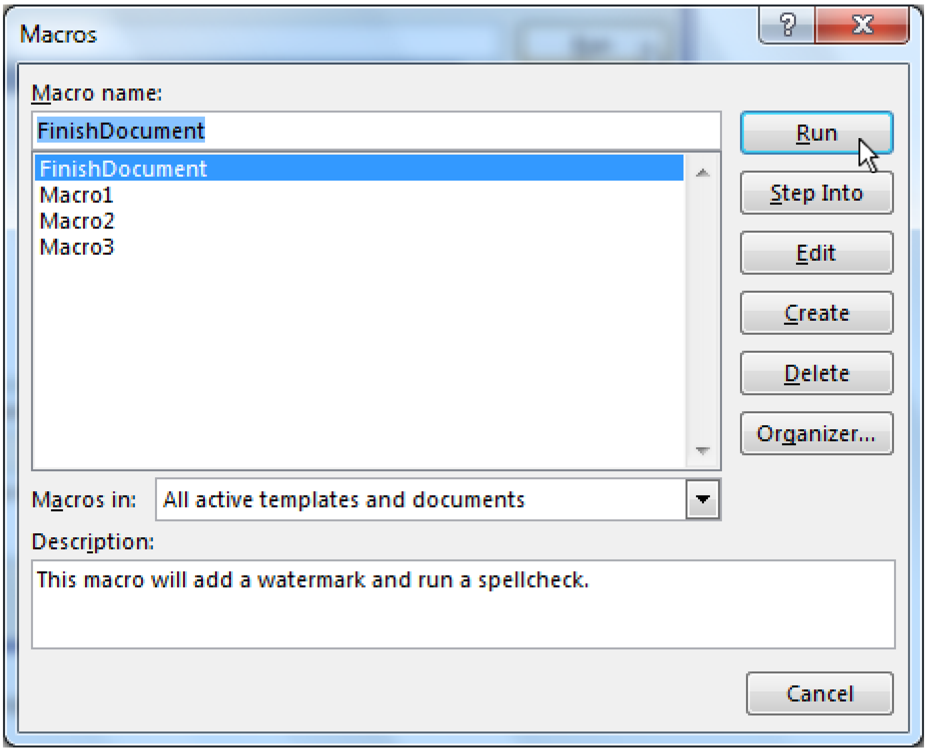


Running a Macro

To run a macro, click the Macros command on the Developer ribbon or click the Macros – View Macros command on the View ribbon.



Then, a dialogue will open showing you all macros available in the document. Simply choose the macro that you want and then click Run.

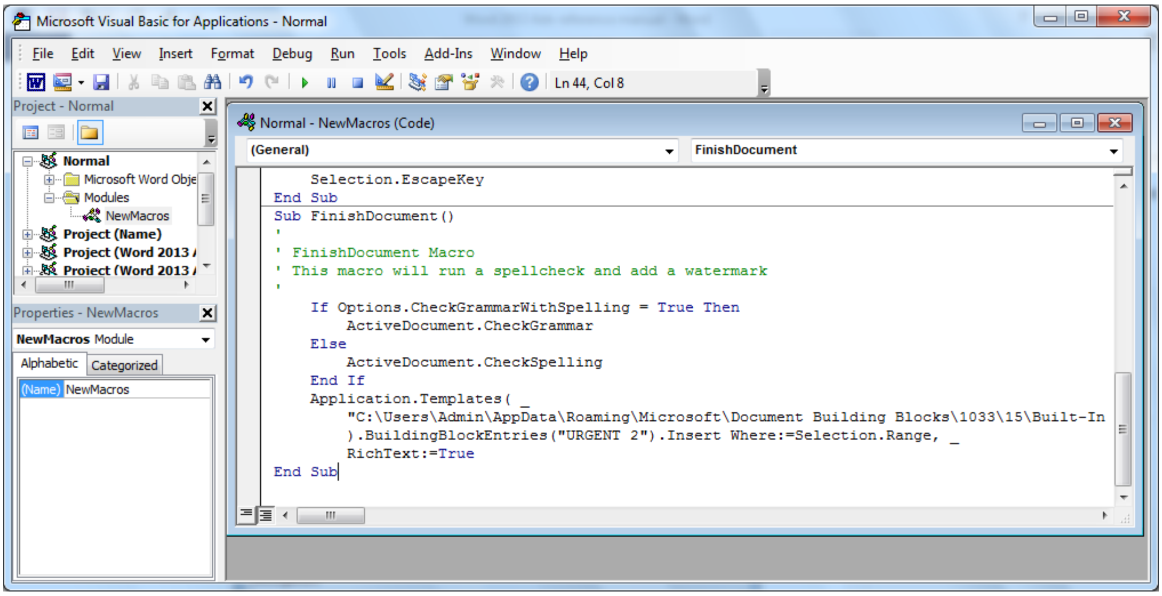


Here's a description of the other commands on the right hand side:

Step Into	Lets you run the macro line by line in Visual Basic Editor.
Edit	Opens the macro in Microsoft Visual Basic Editor so you can edit it.
Create	Creates a new macro in the Visual Basic Editor, overwriting the selected one.
Delete	Deletes the selected macro.
Organizer	Opens the macro organizer.
Cancel	Closes this dialogue without making any changes.

Editing a Macro's Code Using the Visual Basic Editor

When you select a macro and click Edit, the macro will open in Microsoft Visual Basic Editor:



The Visual Basic Editor is a very powerful program capable of a lot of tasks. We’re not going to delve into it in depth as there are entire books written on this program alone, but let’s take a look at each of its menus to get an idea of what you can do.

File	Save, export, print, or delete this macro, or import a new macro.
Edit	Contains basic editing commands such as cut, copy, paste, find, replace, undo, redo, and indent and outdent. You can also view properties, values that remain constant (called constants), quick info, and parameter info. Bookmarking tools (which are used in queries) are also in this menu.
View	Allows you to change your view and open toolbars.
Insert	Add other elements to your project, such as forms, files, procedures, and modules.
Format	Change the alignment, grouping, size, spacing, and order of items with this menu.
Debug	Compile your project, run certain parts of the script, watch for a part of script, toggle or clear breakpoints, and set statements.
Run	Run the macro, reset the macro, add a break, or enter design mode.
Tools	Add references, additional controls, or a digital signature. You can also enter the main macro dialogue box, edit project properties, or set Visual Basic Editor options.
Add-ins	Manage add-ins using this menu.
Window	Split, tile, cascade, arrange, or toggle between open Visual Basic Editor windows.
Help	Contains Visual Basic Editor help.

In the main part of the Visual Basic Editor screen, each line of your macro is broken down in a list of code. As each line is shown here, this is a good way to see exactly what a macro will do before you run it.

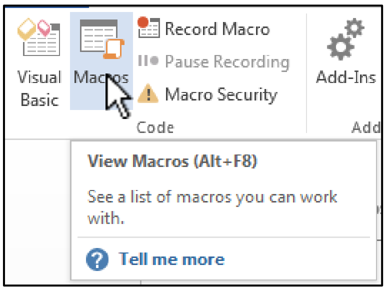
Once you’re done making your changes, click the File menu and click Close and Return to Microsoft Word. Your changes will automatically be saved.

Advanced Macro Tasks

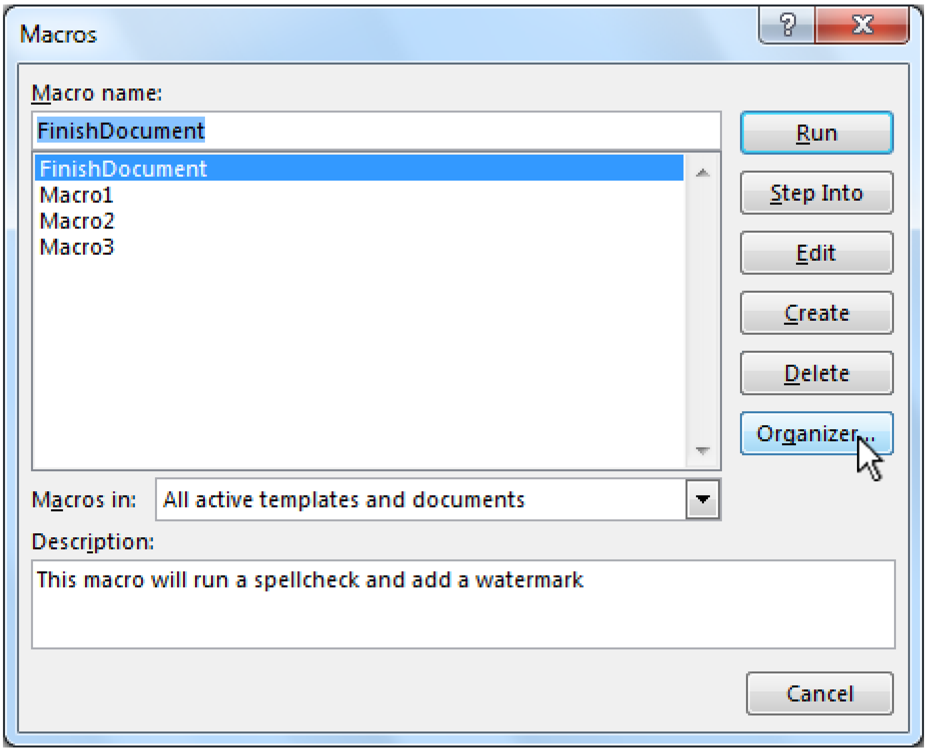
Now that we know how to record and run a basic macro, we're going to learn how to copy macros from a template, assign keyboard shortcuts and toolbar buttons to macros, and how to use macro names.

Copying a Macro from a Template

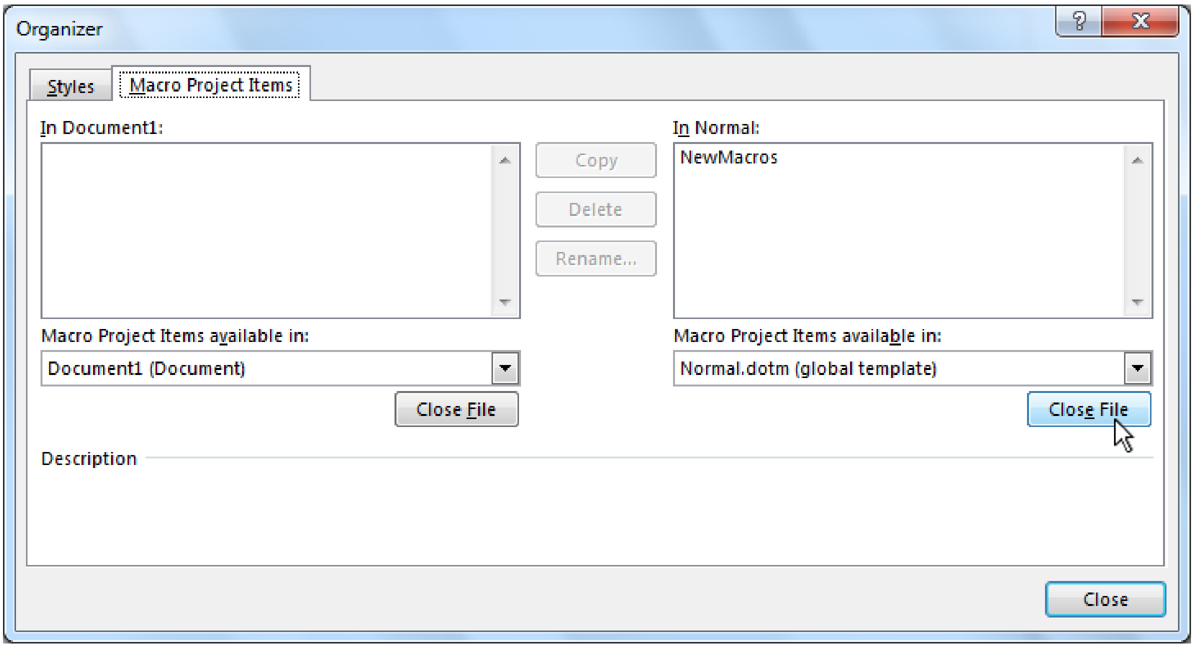
Macros are often included in templates as a way of ensuring consistent formatting and to help speed up tasks. If you need a macro but not the entire template, there's an easy way to extract the macro to the current document. First, click the Macros command on the Developer ribbon.



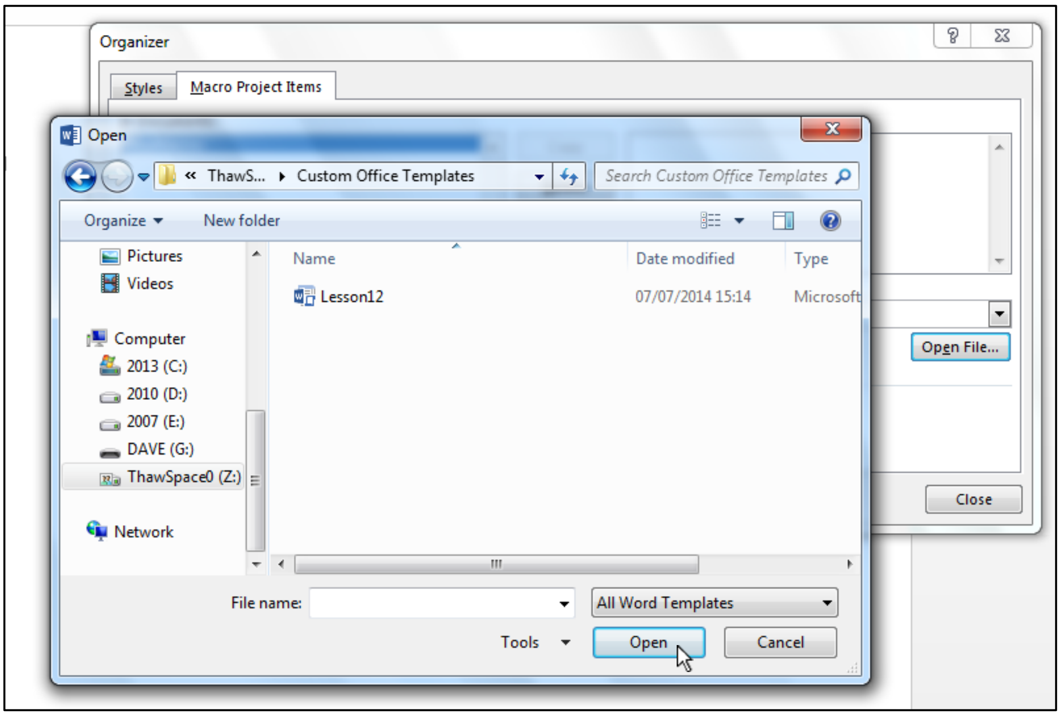
Now, choose the Organizer command.



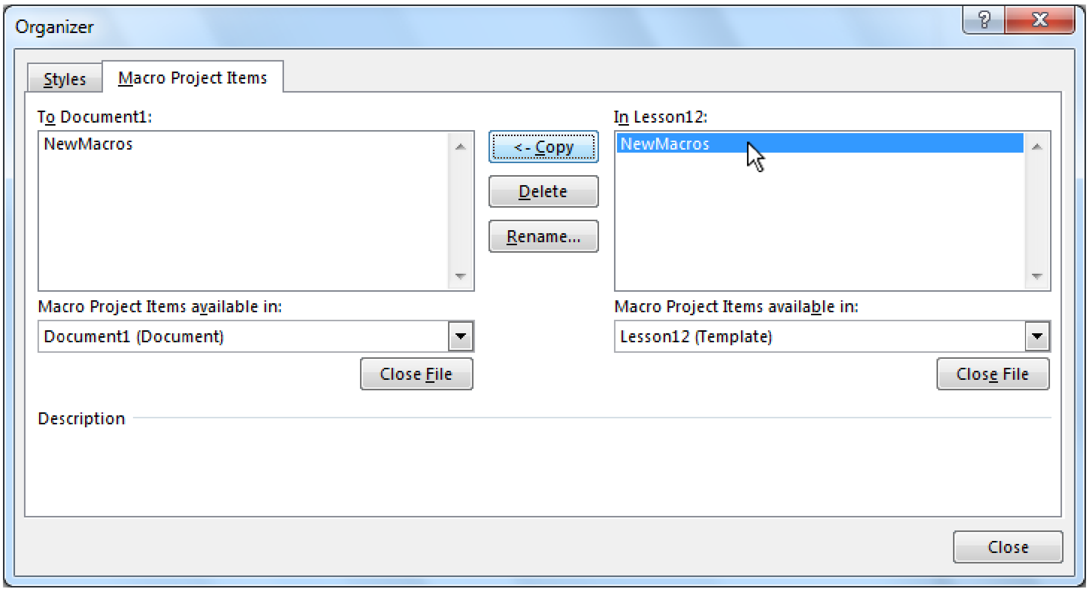
Click Close File to close the current template.



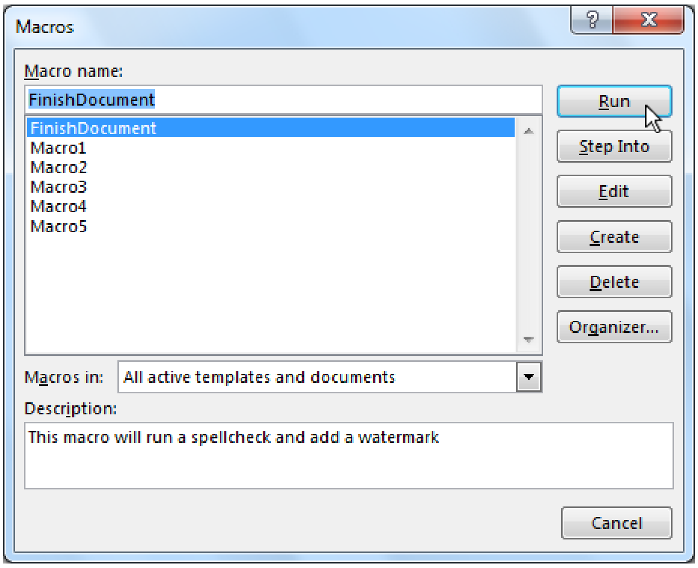
Now, the Close File button will turn to an Open File button. Click it to open a Browse window where you can choose another template.



Choose NewMacros and then click Copy.

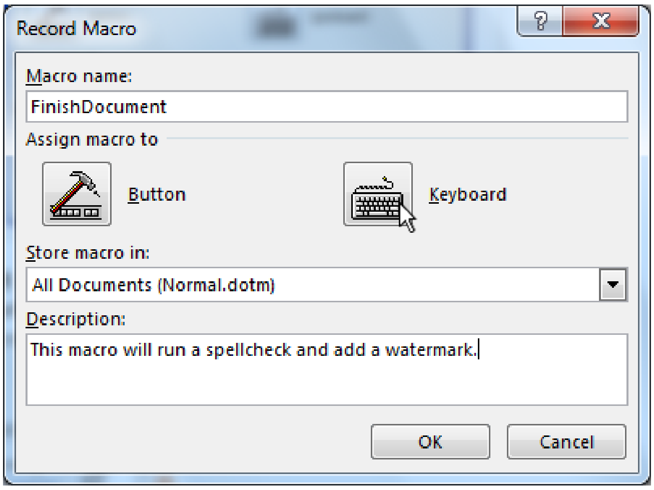


Now, click Close. If you re-open the Macros dialogue, you should see the macro there that you can run.

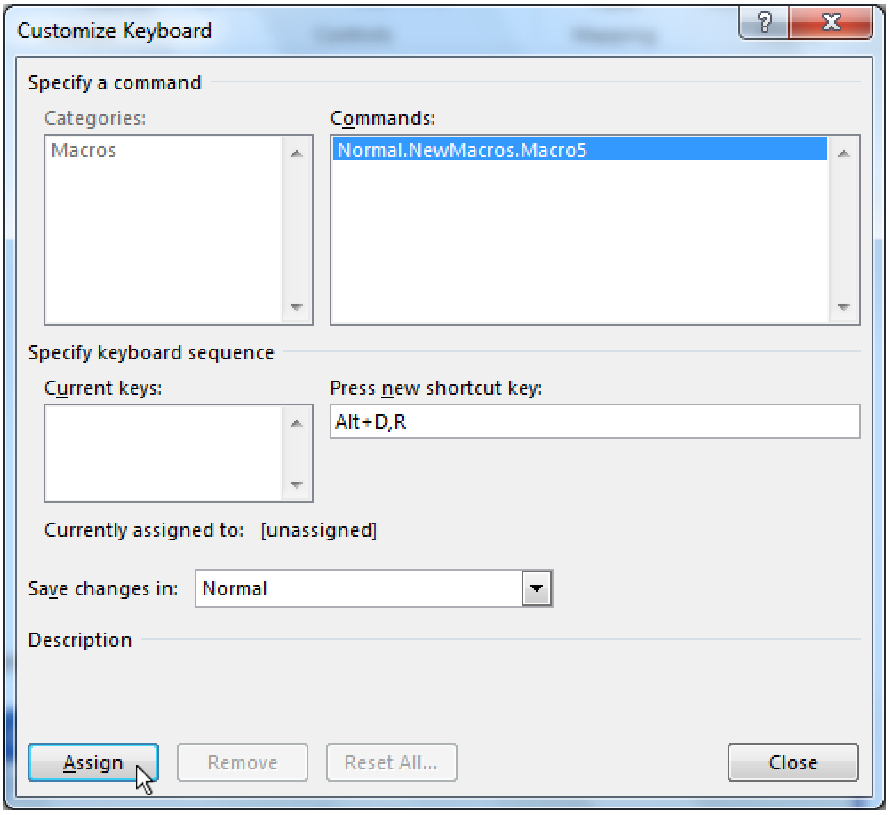


Assigning a Macro to a Keystroke

Macros are supposed to save you time, and there's no greater timesaver than keyboard shortcuts. To add a keyboard shortcut while creating a macro, click the Keyboard button in the Record Macro dialogue.



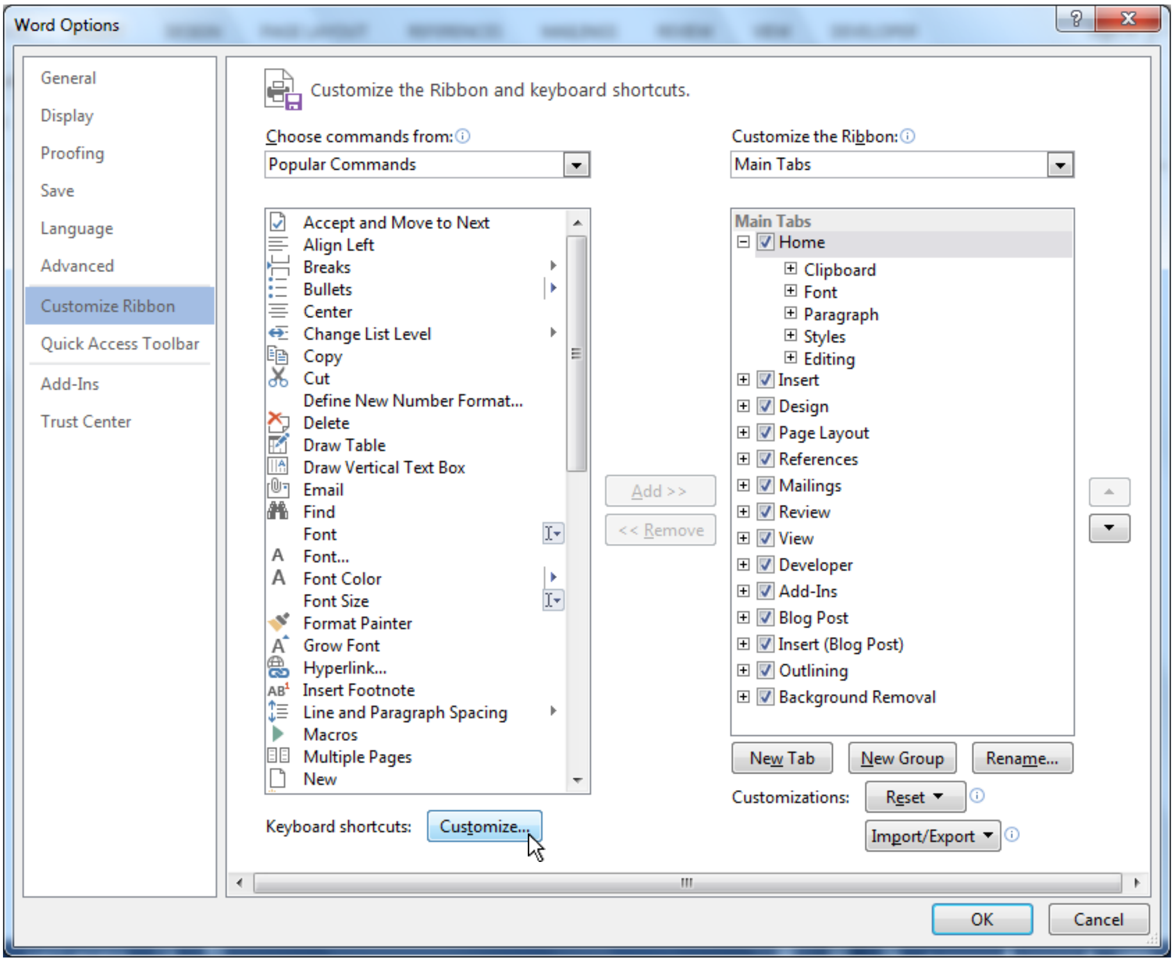
Then, simply press the shortcut keys that you want for this macro.



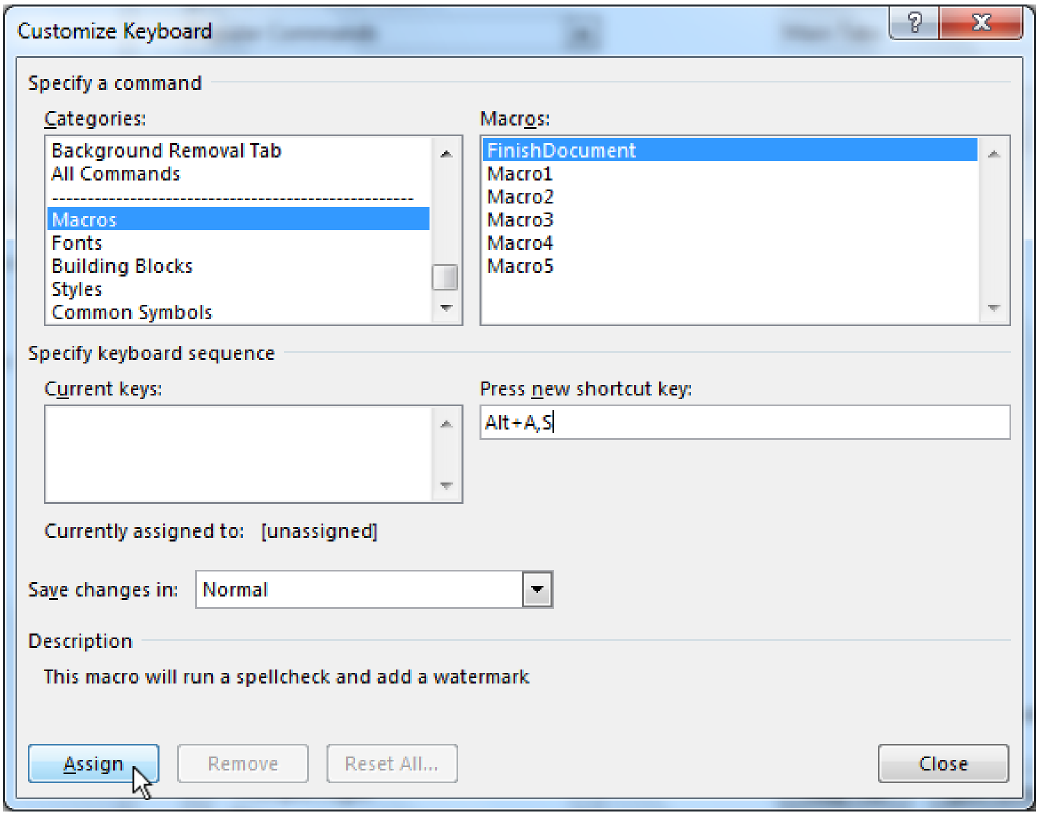
Word will tell you what the keys are currently assigned to, if anything. Then, you can delete the current keys from the text box and type new ones, or just click Assign to accept the keys.

If you decide to add keyboard shortcuts to a macro after you've created it, you will have to do it from the Options dialogue, which can be opened from the Backstage view.

Click the Customize Ribbon category and then click the Customize button next to Keyboard Shortcuts.



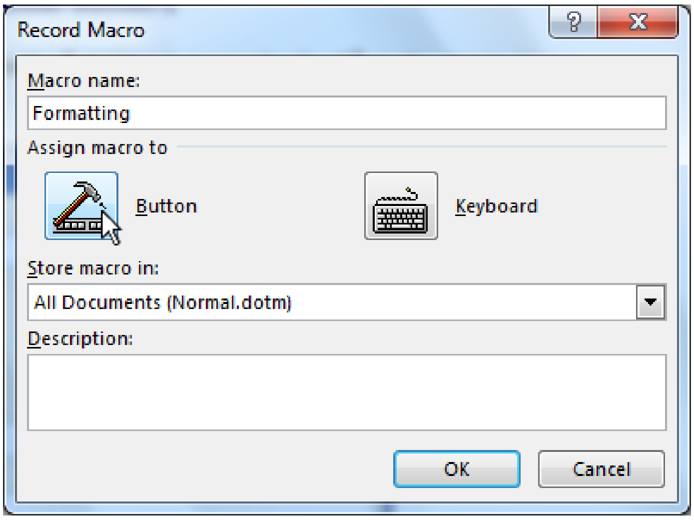
In the Customize Keyboard dialogue, choose Macros from the category list and then click the specific macro that you want to edit. Now, click in the “Press shortcut keys” text box and type in a shortcut like before. Then, click Assign.



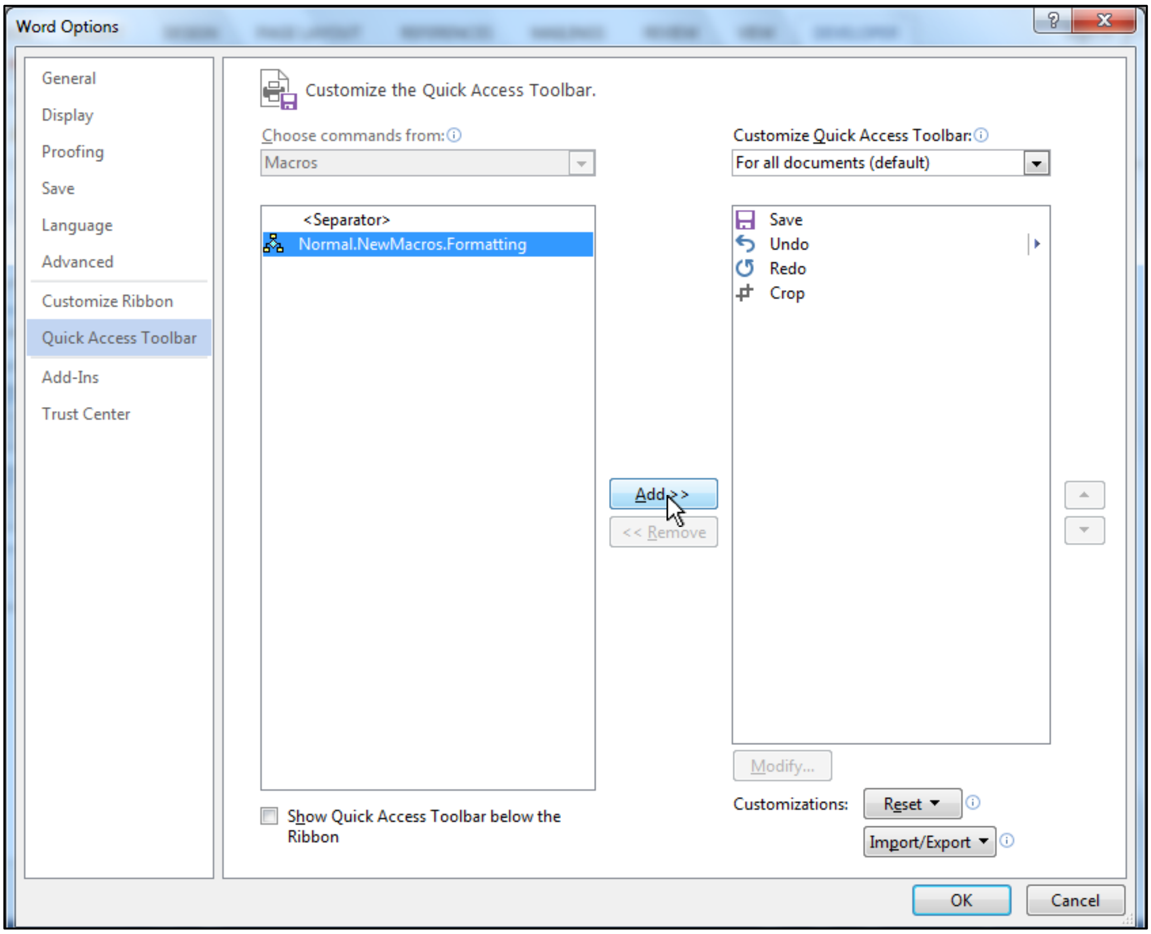
You can always edit the shortcuts later on from this dialogue box.

Assigning a Macro to a Quick Access Toolbar Button

You can also add a macro to the Quick Access toolbar via the Create Macro dialogue.

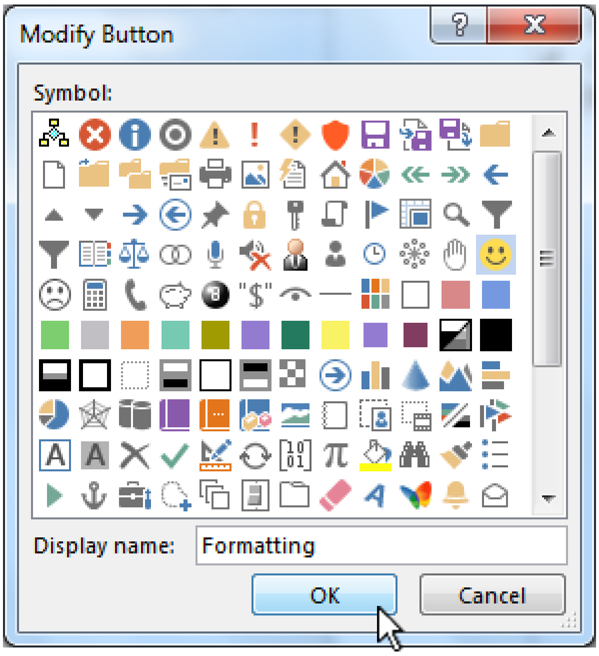


This command will open the Customize section of the Options dialogue. Here, you can click the macro and click Add to add it to the Quick Access toolbar.



If you choose to add the macro to the toolbar after it has been created, simply open the Quick Access Toolbar section of the Options dialogue. Then, in the “Choose commands from” list, choose Macros. Now you can click any macro and click Add.

You can then use the Modify option to change the name and appearance of the button for the macro if required.



Deleting a macro

Occasionally, you may wish to delete a macro. To do so:

1. Go to Developer/Code Group and click the Macros button.
2. Select the macro you wish to delete from the list of available macros.
3. Click Delete.

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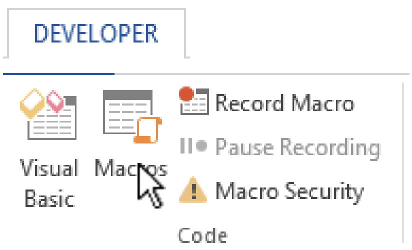

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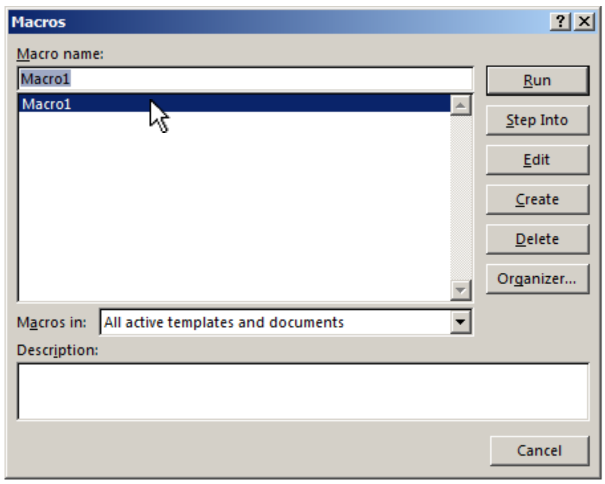

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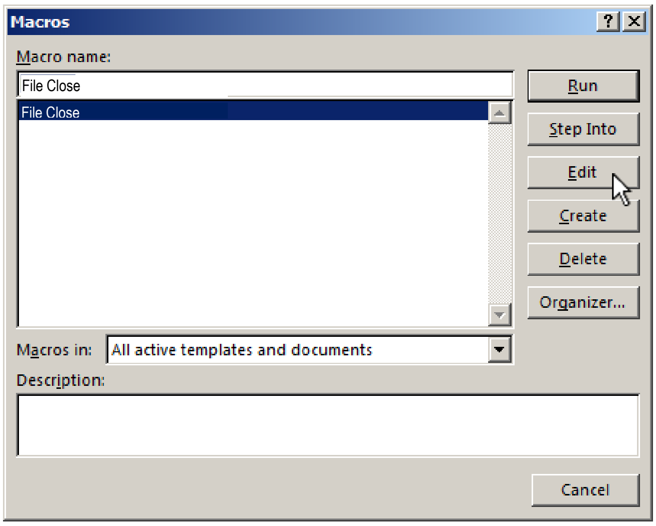
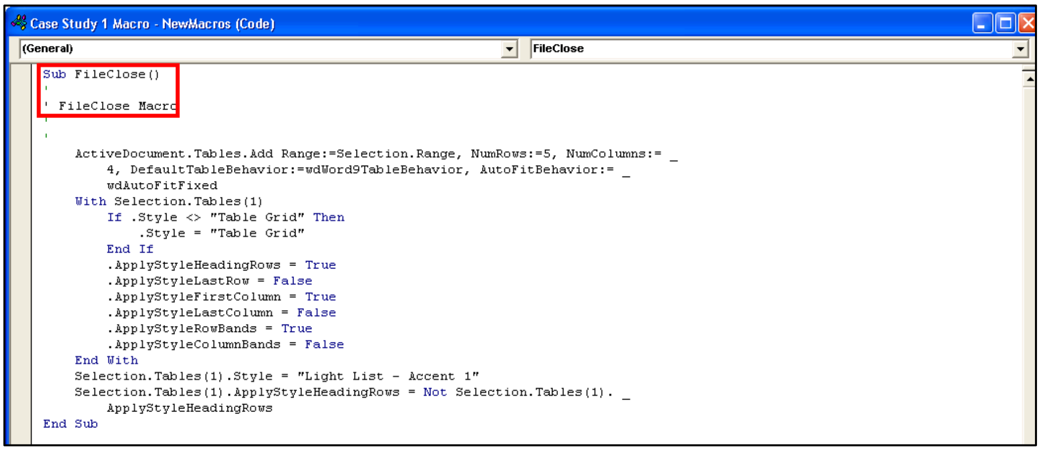
About Macro Names

You can also use macros to change how Word behaves. If you give a macro a name for an already existing command, that macro will run when that command is executed. Let's say that you create a macro called "FileClose" that adds formatting to your document. By naming it FileClose, it's now attached to the Close command.

If you do this by accident, choose the Edit option from the Macros dialogue box.



Then all you need to do is rename your macro in the Visual Basic Editor and the original command will be restored.



```
Sub FileClose()
'
' FileClose Macro
'
'
    ActiveDocument.Tables.Add Range:=Selection.Range, NumRows:=5, NumColumns:= _
        4, DefaultTableBehavior:=wdWord9TableBehavior, AutoFitBehavior:= _
        wdAutoFitFixed
    With Selection.Tables(1)
        If .Style <> "Table Grid" Then
            .Style = "Table Grid"
        End If
        .ApplyStyleHeadingRows = True
        .ApplyStyleLastRow = False
        .ApplyStyleFirstColumn = True
        .ApplyStyleLastColumn = False
        .ApplyStyleRowBands = True
        .ApplyStyleColumnBands = False
    End With
    Selection.Tables(1).Style = "Light List - Accent 1"
    Selection.Tables(1).ApplyStyleHeadingRows = Not Selection.Tables(1). _
        ApplyStyleHeadingRows
End Sub
```

Index