Beyond the Basics of Word Processing

Microsoft Word 2007

Instructor: Don Bremer

Presented and co-sponsored by:

CENTER FOR ECONOMIC DEVELOPMENT

11 East Superior Street, Suite 210
Duluth, MN 55802
218-726-7298 (main)
888-387-4594 (toll free)
www.umdced.com
ced@umdced.com

U.S. Small Business Administration
Your Small Business Resource

MINNESOTA SMALL BUSINESS
DEVELOPMENT CENTERS

The University of Minnesota Duluth is an equal opportunity employer and educator.

The Mission of the University of Minnesota Duluth Center for Economic Development is to assist entrepreneurs and businesses to grow and succeed.

Workshop Outline for Beyond the Basics of Word Processing
Microsoft Word

Word Processing is using a computer program such as Microsoft Word to create, edit, and produce text documents. Microsoft Word helps you create professional-quality documents because it lets you type and format text, correct errors, and preview your work before you print or distribute a document.

Microsoft Word is a word processing program used to compose and update a wide range of business and personal documents. In addition, Word offers many desktop-publishing features that let you enhance the appearance of documents so they are appealing and easy to read. Microsoft Word has the power and flexibility to create a letter, memo, fax, annual report, newsletter, or book quickly and easily.

Beyond the Basics of Word Processing
(Prerequisite: experience using Microsoft Word) Go beyond the basics of word processing and learn how to create and use templates, table of contents, indexes, forms, columns, work with tables, and mail merge.

Objectives
- Use templates to create a basis document
- Learn different styles and formatting
- Create a table of contents
- Learn how to use indexes
- Learn the ins and outs of forms
- Use a table to organize information
- Using columns to present information
- Work with mail merge
- Work with the drawing toolbar and graphic images

Start the Word program. The most common way to start Word is to use the **>START>** button on the Windows taskbar. Locate Word 2007in the menu and launch the application. **>START>PROGRAMS >MICROSOFT WORD 2007>**

- Time saving tip:
    - **>RIGHT-CLICK>** anywhere on any toolbar, and then on the list of toolbars to select available toolbars to be added to your toolbar rows

Templates

Using a template is a great way to begin a document. Every document is based on a template, a collection of document formatting options, styles, and content that is available when you create a new document. By default, each new document you create is based on a N*ormal* template. When you select a template, a new document opens which contains the styles in the template you choose. If you choose a memo template, the document is styled in the memo format; it includes placeholder text that you replace with your own text.

Word wizards also help automate the creation of documents. A *wizard* is a small application that does most of the work of creating letters, web pages, reports, etc. The wizard presents you with a series of questions in which you select options and specify text. Then the wizard applies your choices to the document.

>OFFICE BUTTON> New, the **Blank and Recent**. Preview the variety of templates already created for you.

Exercise: Create, modify and saving a template

1. Create a new Document **>TASK PANE>New from Template**
2. **>CLICK> Faxes >SELECT** *Fax Cover Sheet (Professional design)*
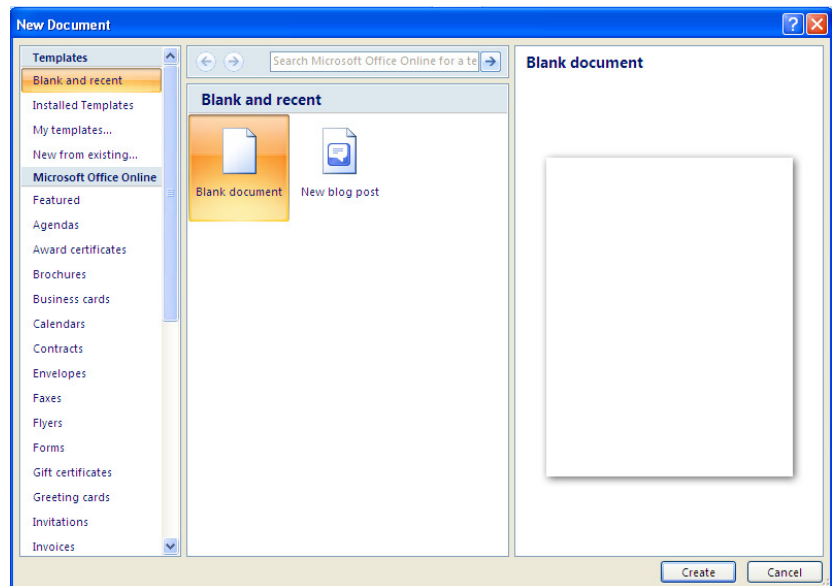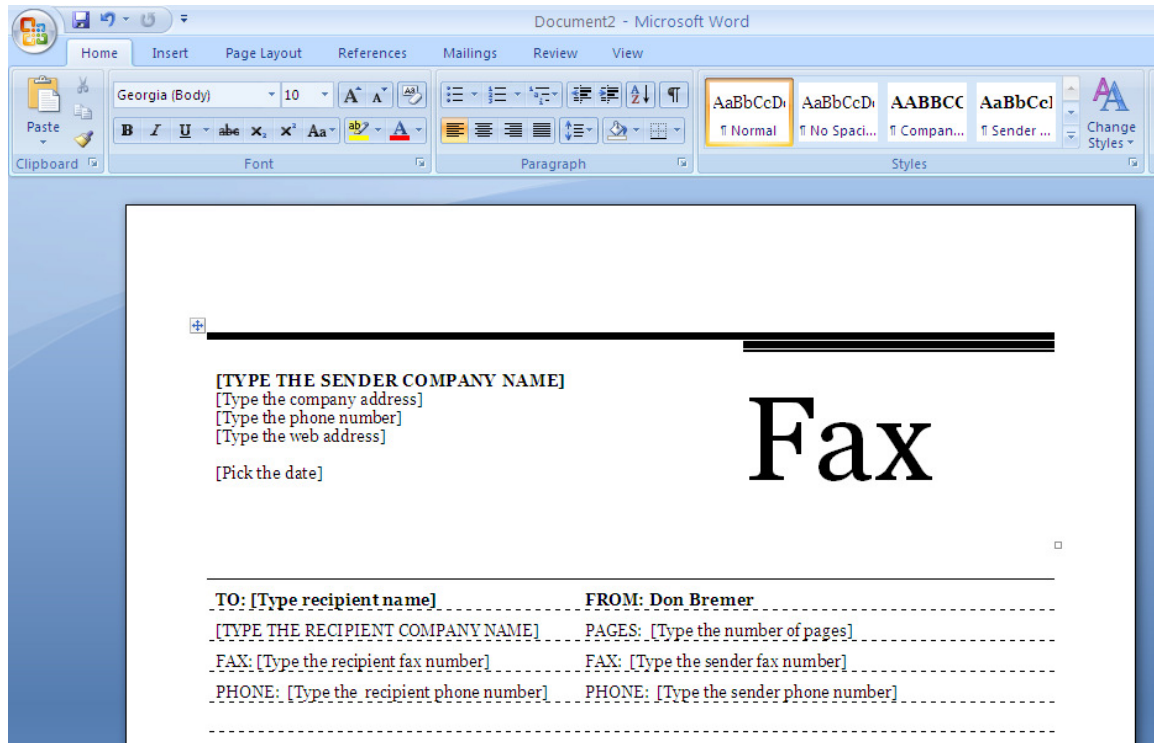
3. If formatting marks are not currently displayed, on the Home tab in the standard ribbon>CLICK>SHOW/HIDE ¶ BUTTON
4. At the top of the document>CLICK>SELECT text return address>TYPE>*11 East Superior Street, Duluth, MN 55802,* >PRESS ENTER>, >TYPE >*Phone: (218) 726-7298. Fax: (218) 726-6338*
5. >ENTER>Company Name>*UMD Center for Economic Development*
6. >CLICK>the placeholder text to select the line To:>TYPE>*A.B. Carlson*
7. >CLICK>the placeholder text to select the line From:>TYPE>*your name*
8. Remaining lines complete as follows. >TYPE> *Fax: (206) 555-1212, Pages: 1, Phone: (206) 555-1213, Re: Invoice #10001* Leave the CC line blank. Note that Word automatically inserts the current date.
9. >SELECT>the text after Comments, >TYPE>*Here's the initial invoice for the company's training services to date. Please contact your name with any questions. Thank you.*
10. In the Office Button>CLICK>SAVE>In the file name box<TYPE>*Fax cover sheet01,* >CLICK>SAVE
11. In the row of options for attention, select the word, *Urgent*>TYPE>*Invoice,* >DOUBLE-CLICK>the Invoice check box
12. >SELECT>the heading *Fax*, including its ending paragraph mark>CLICK>THE FONT SIZE DROP-DOWN ARROW >CLICK> 36,>CLICK>SAVE
13. If you will be using this fax cover sheet as a basis for future faxes you might want to edit it to be more generic, because details will change from fax to fax. >SELECT>in the Re line the number *10001,* >TYPE>*[Number goes here]* In the Pages line>SELECT>number *1,* >TYPE>*[Number of pages goes here]* The

> date will be automatically updated when you open a new document. In the Comments area**>SELECT>**the text**>TYPE>***[Remarks about the fax go here]*
>
> 14. On the Office Button**>CLICK>SAVE AS** In the File Name box**>TYPE>***Fax template 01***, CLICK>**S**AVE** A**S** T**YPE- DROP-DOWN, >SELECT>** D**OCUMENT** T**EMPLATE**(*.dot)
> 15. **>CLICK>SAVE, CLICK>CLOSE**

- Time saving tip:
  - To distinguish files from templates files, it is helpful to see file extensions in file names. Documents end with the .doc extension while templates end with .dot extensions.
  - You can send an instant fax using the Fax wizard, but must have fax software installed on your computer.
  - If you edit a template or document directly and then choose **>SAVE>**, you will overwrite the original template. Instead, choose **>SAVE AS>** and assign the template a different file name.

Styles and Formatting   (Reveal Formatting)

A style is a set of formatting instructions which are saved, and can then be applied to text Use styles to apply uniform formats quickly to text throughout a document. Word comes with several styles already defined.

Applying a Style

1. Select the text to have the style applied to it.
2. Click the style list on the home tab of the ribbon.
3. Select the desired style from the drop-down list.
4. Deselect the text.

Displaying Style Names

1. From the menu, select Tools, Options, click the View tab if necessary.
2. Set the style area width to the desired width.
3. Click OK.
4. Style names will display on the left edge of the screen.

Creating a Style from Existing Text

1. Format existing text with the formatting options you would like as a style.
2. Select the formatted text.
3. Click in the style box on the ribbon.
4. Type a name for the style.
5. Press Enter.

Deleting a Style

1. From the ribbon, select Format, Style.
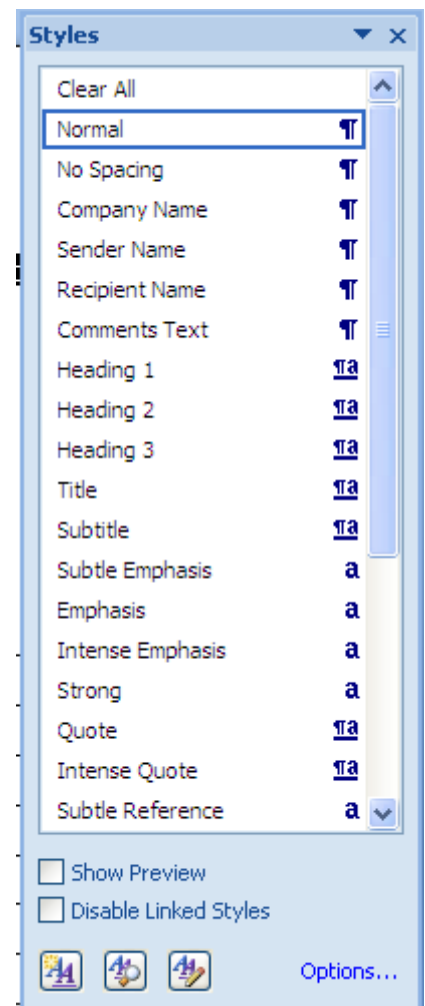
2.	Select the style to be deleted.
3.	Click Delete, click Yes to confirm the deletion.
4.	Click Close.
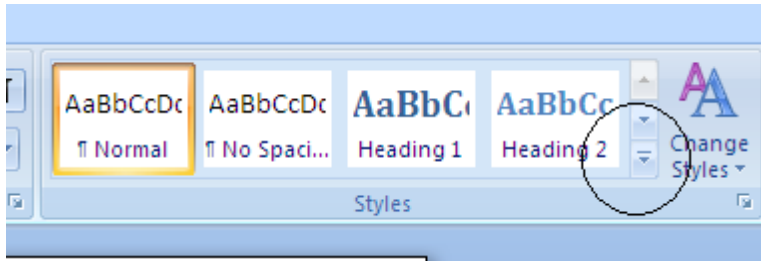
If the heading styles that you use are not in the Gallery, click on the "Change Styles" button, then "Style Set" to pick the set of styles used on the drop-down.

Outline Styles-Bullets and Numbering

1.	Position the insertion point where the outline text will begin.
2.	From the home tab on the ribbon, select Format, Bullets and Numbering.
3.	Click the Outline Numbered tab if necessary.
4.	Select the desired outline style by clicking on it.
5.	Click OK.
6.	To indent in one level (once the outline has been started), press the tab key on the keyboard or use the indent icon on the toolbar.
7.	To unindent one level press Shift+Tab, or use the decrease indent icon on the toolbar.

Exercise: Styles >Open>the file *Black Gold*

1.	SELECT the line of text *Why Compost?*
2.	On the home tab of the ribbon, CLICK the dropdown on Styles and Formatting.

3. In the Styles and Formatting Task pane, **POINT** to the preview box in the **Formatting of selected text** section. It displays the styles and attributes of the selected text.

4. In the **Pick formatting to apply** section of the Styles and Formatting Task pane, **SCROLL DOWN** the list and **CLICK** the **Heading 2** style.

5. **CLICK** in the document, **HOLD DOWN** the **ctrl key** while locating the text *What is a Compost Pile?*, *How do you make a compost pile?*, *Hot or Cold?*, and *Compost and Soil*.

6. In the Styles and Formatting Task pane, **CLICK** the **Heading 2** style to apply the style to the selected text.

7. **SCROLL** to the top of the document, **SELECT** the line of text *Why Compost?* **CLICK** **Select All** in the Styles and Formatting Task pane. All the text in the document with the same style of text is highlighted.

8. **CLICK New Style** in the Styles and Formatting Task pane. In the Name box, **TYPE** *Heading 2 Plus*.
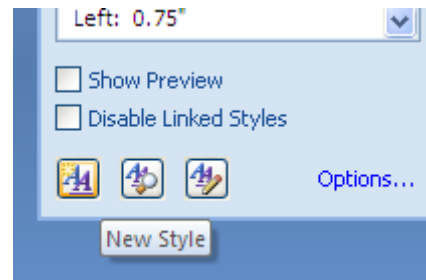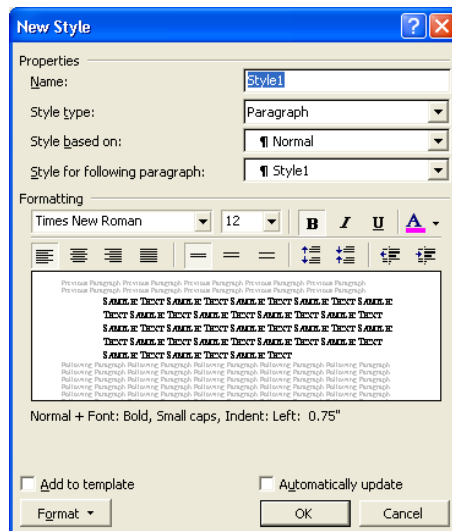
9. In the formatting area, **CLICK** <u>Font Size down arrow</u> select **16**, **CLICK** the <u>**Font Color down arrow,**</u> **SELECT Blue**, **CLICK OK**. The Heading 2 Plus style appears in the Styles and Formatting Task pane.

10. In the <u>Styles and Formatting Task pane</u> **CLICK** the **Heading 2 Plus** style in the **Pick formatting to apply selection**. The new style is applied to the text.

11. In the <u>Styles and Formatting Text pane</u>, **POINT** to the **Heading 2 Plus** style, **CLICK** the **Heading 2 Plus down arrow** and **CLICK modify**.

12. **CLICK** the **Italic** button to deselect it and **CLICK OK.**

13. **CLICK Heading 2** in the Styles and Formatting Task pane to restore the text to the original Heading 2 style.

14. In the Styles and Formatting Task pane, **POINT** to the **Heading 2 Plus** style, **CLICK delete**. An **ALERT** box appears, **CLICK YES**.

15. **SAVE** and **CLOSE** your document.

Create a Table of Contents

1. Format the headings/subheadings to be included in the Table of Contents using styles.
2. Position the insertion point where the Table of Contents is to be placed.
3. From References tab on the ribbon, click the Table of Contents button.
4. Select the format of the Table of Contents.
5. Click the Options button.
6. Select the style name and identify the level it is to be at within the table of contents. Clear the numbers from any style you do not want to use.
7. Click OK twice.
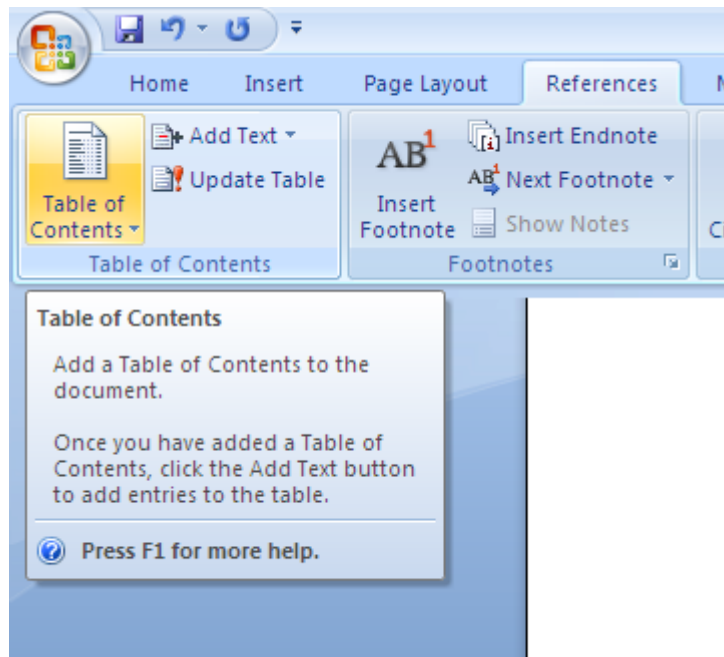
Updating a Table of Contents
1.   Position the insertion point within the Table of Contents.
2.   Press F9.
3.   Select either Update Page Numbers Only, or Update Entire Table.
4.   Click OK.

Indexes

Before an index can be generated, all words to be included in the index must be marked.
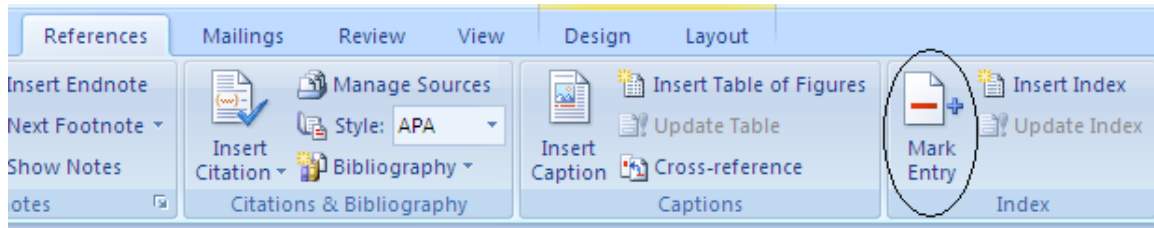
Marking text for an Index
1.   Select the word(s) to be included in the index.
2.   From the references tab, select Insert Index.
3.   Click the Mark Entry button, then the Mark All button to mark all instances of the selected word.
4.   The dialog box will remain open so that you may go on to select the next word, click within the dialog box, then click Mark All again.
5.   Continue until all words are marked.
6.   Click Close to close the dialog box.
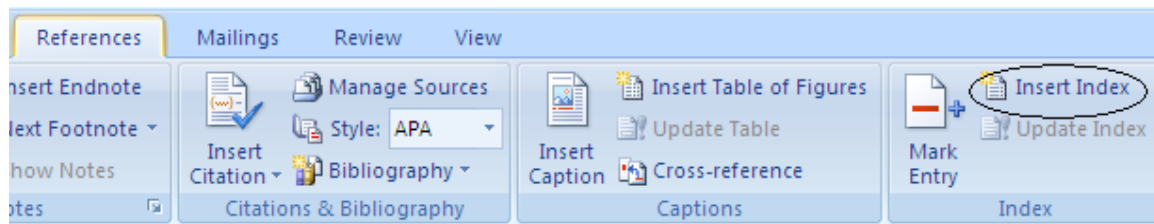
Generating an Index
1.   Position the insertion point where the Index is to appear.
2.   From the reference tab, select Insert, Index and Tables, click the Index tab if necessary.
3.   Select desired format for the Index.
4.   Click OK.

Forms

Forms are used to permit people to only enter information in certain fields. For example, an on-line Injury Report is an example.

Exercise: Creating a form

1. **>OFFICE BUTTON>NEW>**
2. **<SET>**Left tabs at 2 inches at 3.5 inches and 4.5 inches.
3. **<TYPE>**the following information

> Entry Form
>
> Name
>
> Address
>
> City   State   Zip
>
> Phone   Sex   Married

4. Show the developer tab by clicking on the office button, selecting Word options, and on the popular options, select "show developer tab"
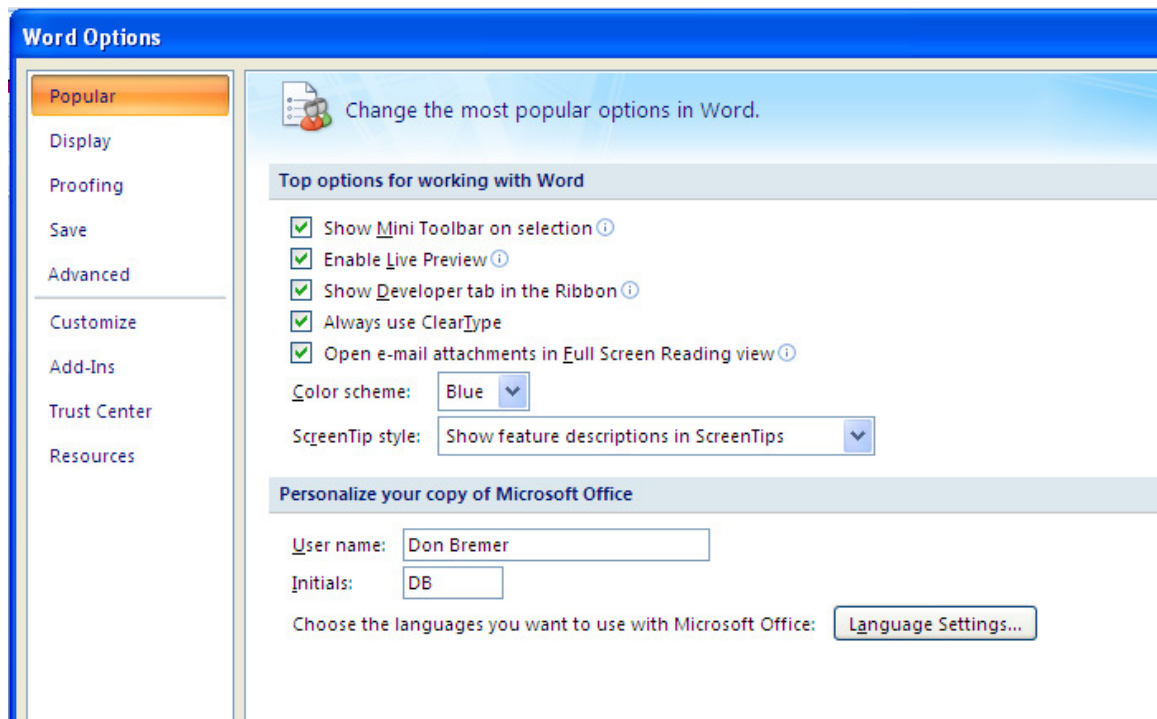
5. Using the proper tools>**INSERT>**form fields, check boxes, or drop-down form fields using the legacy controls
6. Edit properties for each field, >**RIGHT -CLICK>** each field to change properties for each field or use the Form Field Options on the Forms toolbar.
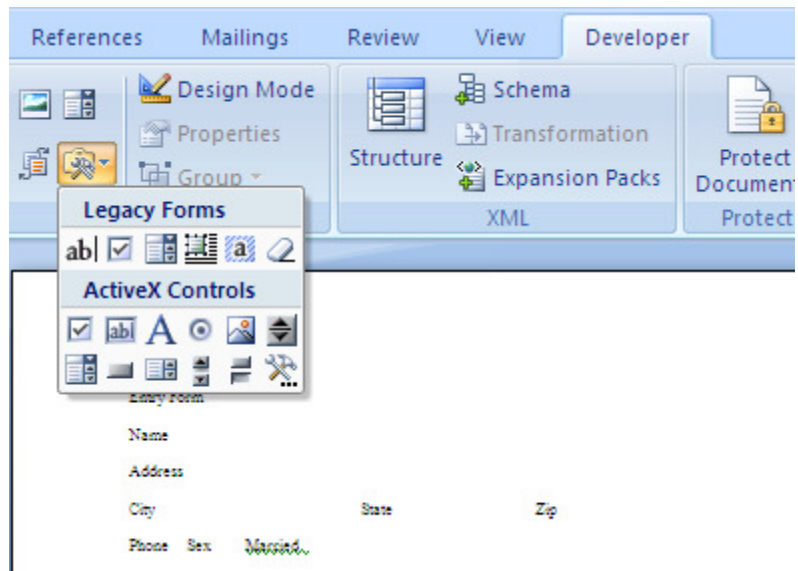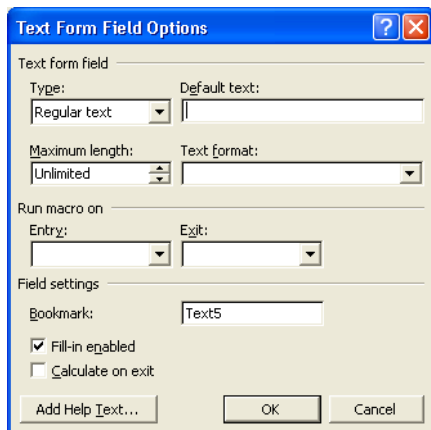
7. **>ADD>**a border around
   Entry Form, **>DE-SELECT>Form Field shading**
8. To lock the form, click on the drop-down under the "Protect Document" button
   and select "Restrict Formatting and Editing". A task pane appears.
9. Make sure Design Mode is de-selected
10. Check the "Allow only this type of editing in the document:" and select "Filling
    in Forms" in the drop-down.
11. Click on the button that says "Yes, Start Enforcing Protection". Put in a password
    if you wish.
12. **>TEST>**form **>OPEN>** as you would any document. Note: you can only type in
    the fields, not edit them.

Completed Exercise:

Entry Form

Name

Address

City   State MN   Zip

Phone   Sex Female   Married ☐

Tables

You can use a table to group and organize the information in your document in a concise, consistent, and easy to read format. Tables organize information in rows and columns. The intersection of a column and a row is a cell. When you insert a table, Word outlines its table and cells with borders.

Cells can be used to insert text that you want to contain in one area.				
You can also mix text and graphics.			This is a 5 column by 3 rows table.	

Planning out your Table
- Determine how many columns you need first (rows can be adding by simply tabbing when you get to the last cell in the table). Determine if you should change the margin and orientation and do so before you create the table.

Adjustment Height
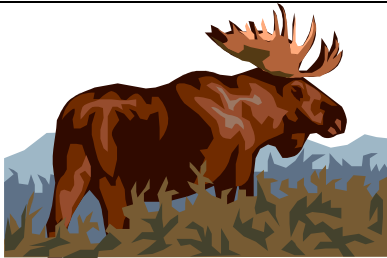- To adjust the height, select the rows (use same technique as selecting a line) you wish to adjust, and use the **>TABLE TOOLS>TABLE LAYOUT>** in the ribbon when on the table to adjust row heights. You can also right-mouse button click on the selected rows and choose Table properties from the short-cut menu that appears.

Adjusting Width
- To adjust the width, select the columns (position the cursor at the top of a column until an arrow pointing downward appears) you wish to adjust, and use the **>TABLE TABLE TOOLS>TABLE LAYOUT>** in the ribbon to adjust Column Widths. You can also right-mouse button click on the selected columns and choose Table Properties from the short-cut menu that appears.

Inserting Rows / Columns
- Select the row/column where you want to insert the new row/column after, **>CLICK>** on the toolbar button **>INSERT ROWS> OR >INSERT COLUMNS>** (it appears on the toolbar where the insert table toolbar button used to appear), or right-click on the selected row or column and choose Insert, or choose the Table menu and the appropriate insert command.

Deleting Rows / Column
- Select the row you want to delete **>RIGHT-CLICK>** on the selected row and choose **>DELETE>** or choose the Table menu and the appropriate delete command.

Selecting the table

- **>CLICK>**anywhere in the table and **>CHOOSE >TABLE TOOLS > LAYOUT >SELECT > SELECT TABLE >** or drag across all columns or down thru all rows.
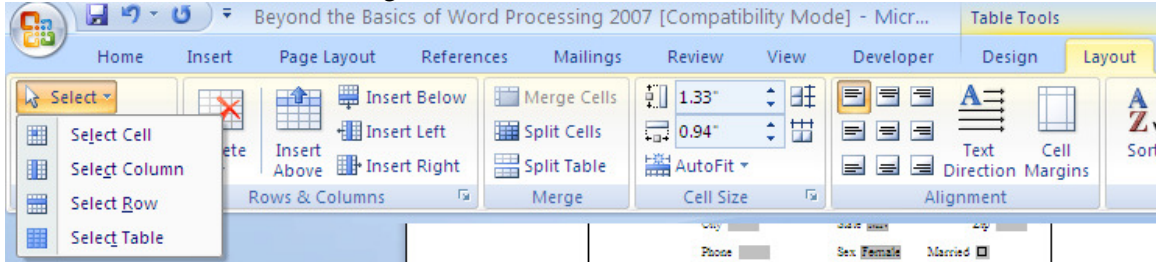
Formatting the table
- Apply Borders and Shading to either specific cells or entire table. **>SELECT>** desired range of cells and **>CHOOSE >FORMAT>BORDERS AND SHADING>** You can also Automatically format the table by clicking anywhere in the table and choosing >Table>Table AutoFormat>

Merging Cells
- **>SELECT>**cells you want to Merge together and either **>CHOOSE >TABLE TOOLS > LAYOUT >MERGE CELLS>** or right-mouse button click on the selected area and choose Merge Cells.

Splitting Cells
- **>SELECT>** cell you want to split and either **>>CHOOSE >TABLE TOOLS > LAYOUT >SPLIT CELLS>** or right-mouse button click on the selected area and choose Split Cells.

- Time Saving Tip:
  Although you can perform many standard calculations in a Word table, the available formulas might not address all you needs. For complex calculations, you can include a Microsoft Excel worksheet in a Word document.

Exercise:

Navigate to My Documents and locate file **Table Exercise**

1. On the ribbon, **Insert ab, Table**
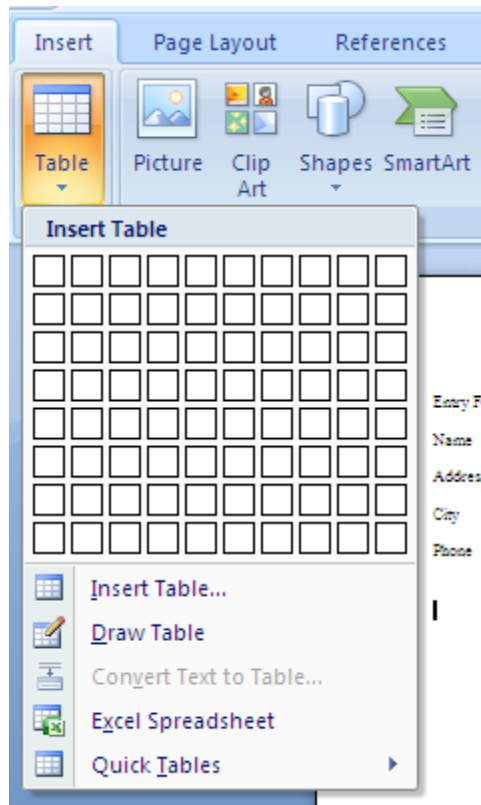
2. Make sure the **Number of columns** box and **Number of rows** displays 5, **>CLICK OK>**.

3. **>POSITION>**the pointer in the selection area to the left of the first row, **>CLICK>**to select the row
4. On the Table tools tab **>CLICK>Merge Cells** to combine the first rows into one cell
5. **>TYPE>***The Garden Company Herb Plant Order Form*
6. **>CLICK>**in the first cell in the second row**>TYPE>***Page No*, **>PRESS>TAB**
7. **>TYPE>***Description*, **>PRESS>TAB**
8. **>TYPE>***Quantity*, **>PRESS>TAB**
9. **>TYPE>***Unit Price*, **>PRESS>TAB**
10. **>TYPE>***Total*, **>PRESS>TAB** to move to the first cell on the next row.
11. **>TYPE>***25*, **>PRESS>TAB**
12. **>TYPE>***Lemon Basil*, **>PRESS>TAB**
13. **>TYPE>***3*, **>PRESS>TAB**
14. **>TYPE>***2.29*, **>PRESS>TAB**
15. **>TYPE>***6.78*.

16. **>POSITION>**the pointer in the selection area to the left of the fourth row **>DRAG>**to select the last two rows
17. On the **Table** tools tab**>POINT>**to **Insert, >CLICK>Rows Below** to add 2 more rows to the table
18. In the last row **>CLICK>** in the first cell, **>HOLD DOWN>Shift**, **>PRESS>right-arrow key** four time, to select the first four cells in the row
19. On the **Table** tools tab **>POINT>**to **Insert, >CLICK>Rows Below** to add two more rows to the table.
20. In the last row, **>CLICK>**the **first cell**, **>HOLD>down Shift**,**>PRESS>right arrow key** four times to select the first four cells in the row.
21. One **Table** tools tab **>CLICK>Merge Cells** to combine the cells in the first two into one cell.
22. **>TYPE>***Total Order Amount*, **>PRESS>TAB** twice.
23. **>TYPE>***Add Shipping and Handling Fee*, **>PRESS>TAB** twice to add a new row.
24. **>TYPE>***Add Deliver Service Fee,*
25. **>TYPE>Total Amount Due**.
26. In the paragraphs below table, **>SELECT>**the block of text that begins Shipping and Handling and ends with 15.95
27. On the **Table** tools tab **>POINT>** to **Convert, >CLICK>Text to Table**.Make sure that the Number of columns box displays 2, **>click>OK**.
28. **>CLICK>** in the table to **deselect** the cells, **>POINT>** to the right edge of the table until the pointer changes to a thick double-headed arrow, **>DOUBLE-CLICK>**to resize the table to the width of the text in the cell.
29. **Scroll down**, **>CLICK>**anywhere in the Delivery Services table to place the **insertion point**. On the **Table** menu, **>CLICK>Sort**.
30. **>CLICK>**the **sort by down arrow**, **>CLICK>(Column 20)**, make sure the **Descending option** is selected, make sure the **Header row option** in the **My list has** is selected, **>CLICK>OK**.
31. **>CLICK>Print Layout View**, **scroll down** the document window to bring **Delivery Services** table, the **Shipping and Handling Fees** table, and the bottom of the **Order Form** table into view.
32. **>HOLD>down the Select Table button** in the upper-left corner of the **Delivery Services** table to select the table.
33. **>DRAG>**the outline of the table up and to the right of the **Shipping and Handling Fees** table, **>ALIGN>**the top of the **Delivery Services** table with the top of the **Shipping and Handling** table and the right side of the **Delivery Services** table with the right side of the **Order Form** table. When the Delivery Services table is positioned correctly, **>RELEASE>**the mouse button.
34. **>POINT>**to the **Delivery Services** table, **>DRAG>**the selection handle in the lower-right corner down, releasing the mouse button when the lower edge of the **Delivery Services** table is aligned with the lower-edge of the **Shipping and Handling Fees** table.
35. On the Standard toolbar **>CLICK>Save**, **>CLICK>Close**.

Completed Exercise:

Please complete this form:

The Garden Company Herb Plant Order Form				
Page No.	Description	Quantity	Unit Price	Total
25	Lemon Basil	3	2.29	6.87
Total Order Amount				
Add Shipping and Handling Fee				
Add Delivery Service Fee, if necessary				
Total Amount Due				

Shipping and Handling	Fees
$15.00 and under	$3.95
$15.01 to $30.00	$4.95
$30.01 to $50.00	$7.50
$50.01 to $75.00	$10.95
$75.01 to $100.00	$13.50
$100.01 and up	$15.95

Delivery Services	
Next day	$20.00
Saturday	$15.00
2 to 3 days	$10.00

Standard delivery is to 5 to 7 business days.

Presenting Text in Columns
Inserting a column
- **>PLACE>**Insertion Point where newspaper columns should begin.
- From the menu, click the columns button on the standard toolbar.
- **>SELECT>**desired **number of columns** (click OK if in a dialog box).

Ending a Column before the Bottom of the Page
- **>POSITION>insertion point** where you what the column to end.
- From the menu, **>SELECT>Insert>Break>Column Break**.
- **>CLICK>OK**. (Text positioned after the insertion point will be moved to the top of the next column.)

Turning Columns Off
- **>POSITION>Insertion Point** where you want to turn the columns off.
- From the menu, **>SELECT>Insert>Break>Continuous Section Break, >CLICK>OK**
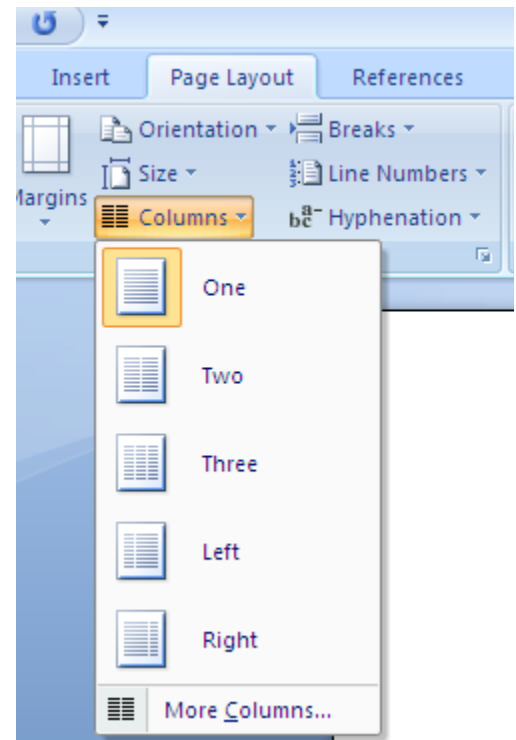
- **>CLICK>columns icon** on the standard toolbar, **>SELECT>one column**. (The columns are turned off from the Insertion Point position forward.)

Column Widths
- **>POSITION>**the **mouse on the column guide on the ruler**, your mouse will change to a double-headed arrow.
- **>DRAG>guide** to the desired position.

<u>**Exercise:**</u>

1. **>OPEN>**document **Column Exercise**
2. On the Format menu, **>click>Columns**
3. **>CLICK>**the number of columns up arrow until 4 is selected**, >click>OK**
4. On the **Edit** menu **>CLICK>Select All**, on the Formatting toolbar, **>CLICK>Justify** to align the text equally with the right and left margins, **>CLICK>** to **deselect** the text.
5. On the footer, **>CLICK>Zoom** to 75%.
6. **>POINT>**to the Right Indent indicator for the second column, **>CLICK>**and**>DRAG>** the pointer to 1/6 inch to the right.
7. **>CLICK>**in the NOTE paragraph that appears after the *Step 2* paragraph. **>DRAG>**the Hanging Indent marker to 1/6" to the right.
8. **>CLICK>**in the NOTE paragraph that appears after *Step 5* paragraph, >Press> the F4 key to apply the same formatting to this paragraph.
9. **>CLICK>**to the left of the text *Step 5* to place the insertion point. On the **Insert** menu, **>CLICK>Break**, **>CLICK>Column break option**, **>CLICK>OK**.
10. >CLICK>to the left of the text *Step 6*, >PRESS>TAB.
11. >Select>Print Preview to view the document, >CLICK>Close, >CLICK>Save, >CLICK>Close.
12. Click OK.

Mail Merge

Mail merge is used when you want to take the same contents in a letter and use it for a list of people. Follow the steps in the Wizard.

Step One: What do you want to do?
- Letter
- E-mail
- Envelope
- Label
- Directory
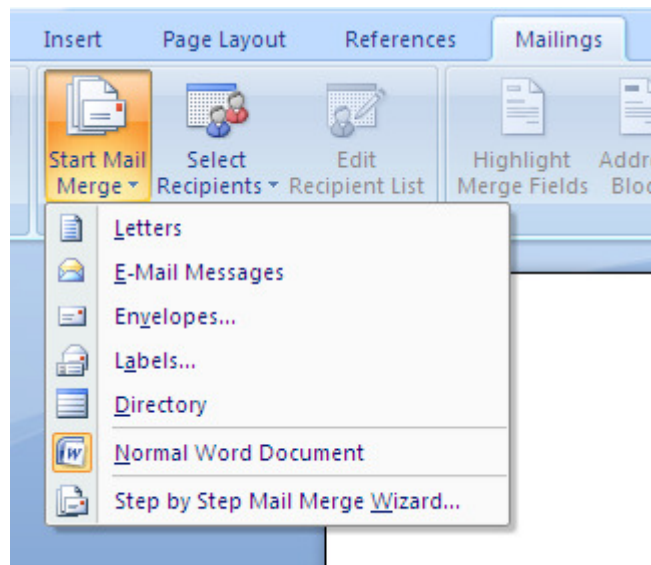
Step Two: **Select Document**
- Current
- Template
- Existing Document

>CREATE>New Document, **>TYPE>**information below.

August 21, 2001

Dear
Congratulations, you have been selected as this year's winner. You will receive a free 10 day trip to the Bahamas. This trip includes airfare from Duluth, four star hotel accommodations, a chauffeured limousine and all meals and $10,000 spending money.

Sincerely,

Ima Rich, President, Winning Travel

Step Three: Select Recipients (Browse to locate)

Fname	Lname	Address	City	State	Zip
Peter	Smith	55 West Melrose Place	Superior	WI	54880
Cathy	Burns	9843 Waverly Lane	Duluth	MN	55804
Tammy	Frest	34 North Oak	Duluth	MN	55811
Sam	Anderson	123 Main Street	Superior	WI	54880
Dana	Johnson	34 North 8th Street	Duluth	MN	55804
Paula	Wilson	135 Tower Avenue	Superior	WI	55480
Howard	Snyder	456 Central Entrance	Duluth	MN	55811
Karl	Jablonski	2020 East Superior Street	Duluth	MN	55812
Rene	Phillips	545 E. 5th Street	Duluth	MN	55805
Fran	Wilson	11 E. Superior Street	Duluth	MN	55802

Step Four: Write your Letter
- Address Block
- Greeting Line
- Electronic Postage
- Bar Code
- More Items

Step Five: Preview your Letter

Step Six: Complete Merge

- Time Saving Tip:
  - Database field names must be consistent with merge field names to merge properly.

Word Shortcuts

CTRL+E	Align Center
CTRL+L	Align Left
CTRL+R	Align Right
CTRL+J	Align Justify
CTRL+B	Bold
SHIFT+F3	Change case
CTRL+X	Cut
CTRL+C	Copy
CTRL+BACKSPACE	Delete a word
CTRL+F	Find and replace
CTRL+G	Go to page, section, line, etc.
CTRL+HOME	Go to the beginning of the document
CTRL+END	Go to the end of the document
CTRL+K	Insert a hyperlink
CTRL+I	Italicize
CTRL+N	New Document
CTRL+O	Open
SHIFT+F7	Open the thesaurus
CTRL+V	Paste
CTRL+P	Print
CTRL+F2	Print Preview
CTRL+Y	Repeat your last action
CTRL+S	Save
CTRL+A	Select all
CTRL+SHIFT+HOME	Select to the beginning of the document
CTRL+SHIFT+END	Select to the end of the document
CTRL+Z	Undo

- Time saving tip:
  - Other keyboard shortcuts are available or can be created. To see what is currently assigned to a particular command, go to the "Tools" menu and choose "Customize". Click on the "Keyboard" button and find the category on the left, and the command on the right. Click on the command and any shortcut keys that have currently been assigned will be displayed. To add a shortcut to a particular command, press combination and see if it is currently "Unassigned". If so, assign and close out of the customize box.
  - To print a screen shot either use keys >CTRL PRINTSCRN> for whole window or >ALT PRINTSCRN> for active window.

Notes: