

Module 1: Conquer MS Word XP

Module Objectives

Upon completion of this module you will be able to:

- Identify Word components
- Customize the Word environment
- Create and organize a filing system
- Create and modify document components
- Manipulate document breaks
- Use advanced Word utilities

Module Introduction

Have you ever gotten frustrated trying to accomplish something in MS Word? You're not alone. Many of the "automated" features that make each successive version of the program more "user friendly" also remove much of the user's control. Hence, the casual user can become confused by all the options while the skilled user can become aggravated with all the controls.

Why study MS Word? To create a comfortable screen environment, to understand how to utilize more features and to accomplish tasks more easily and efficiently.

In this module, you will learn the basic knowledge and skills you need to function easily in Word XP, which you can then adapt for Word '98, Word XP (2003), and Word 2007 (Vista). You will learn how to control the page, organize filing systems and manipulate document components. You will also learn how

to share document revisions with other people, create and manipulate macros, and use Mail Merge.

Lesson 1: The Word Environment

Lesson Objectives

Upon completion of this lesson you will be able to:

- Identify the functions within the Standard toolbar menus
- Identify the functions of the Formatting toolbar icons

Lesson Introduction

MS Word is a powerful, sophisticated program with a multitude of features that make it easy to create and customize any document, from a simple letter to a report complete with graphs and charts to a multi-page presentation full of stylized text and graphics. Many of those features can be customized to your own tastes and needs.

Before you begin modifying the screen, page and text, however—before you start learning about Word’s more sophisticated tools and functions—you must become familiar with the environment itself.

Before you try to make the program comfortable for you, you must become comfortable with it.

In this lesson, you will learn the components of the **Standard** toolbar menus, the functions of the **Formatting** toolbar icons and how to use and hide the **Office Assistant**. You will also learn how to create, save, open, preview and print a simple document.

Standard Toolbar

The Standard toolbar comprises a series of menus, each of which contain numerous functions. The most commonly used of these functions are duplicated as icons on the Formatting toolbar.

File

The **File** menu contains the functions necessary to create a new document, open and close documents, save documents, set up document margins and other parameters, preview and print documents, send documents to various other programs and view the document's properties.

- **New** brings up a taskbar in which you may select to open:
 - A recent document
 - A new blank document in normal.dot
 - A new blank web page
 - An older existing document
 - A new document from a template other than normal.dot
 - A pre-programmed template
 - A user-created template
- **Open** brings up a menu displaying My Documents. Select from one of the displayed files or folders or use the vertical taskbar or horizontal toolbar to move to the desired file location
- **Close** either closes the document or opens a pop-up menu asking if you want to save it

- **Save** opens a menu in which you can name the document and select what type of file to save it as. If you are working on an existing document, **File: Save** merely saves the document under the existing name and file type.
- **Save As**, which opens a menu in which you name the document and select what type of file to save it as. Use **Save As** when you want to:
 - Save as something other than a Word *.doc
 - Save the document under a different name
 - Save an existing document to a different location than its current location
 - Save any document to a different drive, such as a floppy or backup drive
- **Save As Web Page** brings up a menu in which you name the document and select the type of html file to save it as
- **Search** brings up a taskbar in which you can:
 - Search for the name of a file
 - Search for specific text within a file
 - Specify the range of files to search
 - Specify the type of files to search
- **Versions** brings up a menu in which you can:
 - Save the current document as a version that you can refer to later
 - View and select previously saved versions
 - Program the document to save as a version when you close it
- **Web Page Preview** opens your default internet browser and displays the document as a web page

- **Page Setup** opens a menu that consists of three tabs:
 - **Margins**, where you set the margins, orientation and multiple-Print Layout to the Whole Document, the Current Section or From this point forward. To save your current settings as the default settings for normal.dot, click **Default** at the bottom of the menu
 - **Paper**, where you set a pre-programmed or customized paper size, the tray from which the paper will feed into your printer (normally “Default Tray”) and whether to apply the settings to the Whole Document, the Current Section or From this point forward. To save your current settings as the default settings for normal.dot, click **Default** at the bottom of the menu
 - **Layout**, where you set the default section break to:
 - **Next page**, which moves the following content to a new page
 - **Continuous**, which allows the content to continue on the same page
 - **Even page**, which starts the section on an even-numbered page, skipping any odd-numbered interval
 - **Odd page**, which starts the section on an odd-numbered page, skipping any even-numbered interval

This tab is also where you set the parameters and margins for the headers and footers and whether to apply these settings to the Whole Document, the Current Section or From this point forward. To save your current settings as the default settings for normal.dot, click **Default** at the bottom of the menu

- **Print Preview** displays the document as it will appear on the printed page without table gridlines or formatting marks
- **Print** opens a menu in which you select the desired printer and program its properties for the individual document, if necessary. This is also where you select which pages to print, how many copies to print, whether those copies collated, what elements of the document you want printed and whether you want the document reduced or enlarged.



Set the document to print in **Reverse Order** either through **File: Print: Printer Properties** or by modifying the default order through **Start: Printers and Faxes: [printer]**

- **Send To** sends the document to other programs such as your default email or fax program or MS PowerPoint
- **Properties** displays the location, file type, date created, dates revised and various other file and statistical information

Word displays the last several documents worked on at the bottom of the **File** menu. To modify the number of documents displayed:

1. go to Tools: Options: General
2. Click Recently Used File List
3. Select a number between 1 and 9

Edit

The **Edit** menu allows you to undo or repeat typing or format painting; cut, copy and paste text or graphics; put material on the Office Clipboard for use elsewhere in the current document, in a different document or in a different program; clear formatting or contents, select all the material in a

document, find and replace material, and move through the document.

- **Undo** reverses your last command or action or removes the last material you typed
- **Repeat** repeats the last command or action
- **Cut** removes the selected material to the Office Clipboard
- **Copy** copies the selected material onto the Office Clipboard
- **Office Clipboard** displays the contents of the Office Clipboard
- **Paste** inserts the last-copied material at the desired location
- **Paste Special** opens a menu in which you can select how you want the material from the Office Clipboard inserted at the desired location
- **Paste as Hyperlink** converts the material about to be pasted into a web-based or email hyperlink
- **Clear** removes the formatting of selected material or the material itself
- **Select All** selects all the material in a document
- **Find** searches for words, phrases, combinations of letters, formatting and coding
- **Replace** automatically replaces the selected item with an item of your choice
- **Go To** moves the document to a specific location or the next or previous:

▪ Page	▪ Section	▪ Footnote	▪ Line
▪ Bookmark	▪ Comment	▪ Table	
▪ Endnote	▪ Field	▪ Object	

▪ Graphic	▪ Equation	▪ Heading	
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View

The **View** menu allows you to change how the document appears on the screen and what taskbars and toolbars are displayed. It also opens the Header/Footer and Footnotes menus, toggles the Markup function when you are tracking the changes in various versions of a document and adjust the document's magnification.

- **Normal** view, the default view, displays the document in one long sequence without graphically displayed borders or page breaks
- **Web Layout** displays the document as it would appear on the Internet
- **Print Layout** displays the document as it will print, page by page
- **Outline** view displays the document in classic outline form.
- **Task Pane** brings up a vertical panel that opens 8 panes of menus:
 - **New Document** selects the type of new document to create
 - **Clipboard** displays the material currently in the Office Clipboard
 - **Search** institutes a search within a range of folders and file types for documents containing specific text
 - **Insert Clip Art** searches for clip art on your computer or on the web via keyword
 - **Style & Formatting** creates new and modifies existing styles

- **Reveal Formatting** reveals the formatting for the style currently in use
- **Mail Merge** contains a series of six panels that guide you through the Mail Merge process
- **Translate** allows you to select or type in specific text for translation into the languages programmed on your computer
- **Toolbars** opens a menu of toolbars you can display in addition to the Standard toolbar of menus and the Formatting toolbar of icons
- **Ruler** toggles the horizontal ruler in Normal view and the horizontal and vertical rules in Print Layout. Rulers are not displayed in Web Print Layout and Outline views
- **Document Map** displays the document by Headings. You cannot move document elements around via Document Map, but you can use it to move through a document
- **Header and Footer** opens a toolbar and the Header and Footer area of the document so you can insert AutoText or type in the appropriate text. Headers and footers are only displayed in Print Layout
- **Footnotes** moves the cursor to the first footnote in the document
- **Markup** toggles the **Show Changes** function when you are tracking changes in a document
- **Full Screen** hides most screen elements so you can view more of the document
- **Zoom** opens a menu where you can adjust how large or small the document appears on the screen

Insert

The **Insert** menu contains the functions necessary to add built-in and variable elements to a document.

- **Break.** There are five types of breaks:
 - **Line breaks** appear as ↵ when **Show/Hide ¶** is on
 - **Page breaks** appear asPage Break..... when **Show/Hide ¶** is on
 - **Text wrapping breaks** relate to how text wraps around a picture or object
 - **Columns'** text boundaries and margins are displayed on the horizontal ruler
 - **Sections** appear asSection Break (Next Page)..... when **Show/Hide ¶** is on
- **Page Numbers** are inserted as an automatically updated field
- **Date and Time** are inserted as automatically updated fields
- **AutoText** opens a menu of greetings, closings and other standard text often used in letters, memos and faxes
- **Field** opens a menu of possible fields that can be replaced with the information in a database
- **Symbol** opens a menu of standard symbol in the various fonts listed on your computer
- **Comment** widens the right-hand margin sufficiently to insert a pink balloon, connected via a dotted line to your selected text, in which you can type a comment
- **Reference** opens a menu from which you can insert a:
 - **Footnote** or endnote for academic and scholarly work
 - **Caption** beneath pictures, drawings or objects

- **Cross-reference link** that can be inserted as a hyperlink or heading for inclusion in an index or table
- Index or Table of:
 - Contents
 - Figures
 - Authorities
- **Web Component** only inserts a web component when the document is in Web Print Layout
- **Picture** inserts:
 - **Clip Art** from the Clip Art Task Pane
 - **From File** from the Open File menu
 - **From Scanner or Camera** from your scanner or camera files
 - **Organization Chart** opens the Organization Chart toolbar and a canvas on which you can create the chart using a template from the **Diagram Gallery**
 - **New Drawing** opens a drawing canvas on which you can create a drawing via
 - Freehand
 - AutoShapes
 - Any combination of the above
 - **AutoShapes** opens the AutoShape toolbar which comprises a series of menus containing standard, resizable shapes
 - **WordArt** opens a gallery of text artwork
 - **Chart** inserts a standardized chart and a database into which you can input the appropriate data to modify the chart

- **Diagram** opens the Diagram Gallery and canvas
- **Text Box** inserts a textbox at the insertion point. Textboxes can be reshaped by clicking and dragging their corners and formatted by right clicking on the box and choosing **Format Text Box** or going to **File: Format Text Box**
- **File** brings up the Open File menu from which you can insert a file into your current document
- **Object** allows you to create an object in another program or one already created
- **Bookmark** inserts a field code that marks the selected point in the document. You can then move directly to the bookmark
- **Hyperlink** opens a in which you can select or type in an URL or email hyperlink

Format

The **Format** menu allows you to modify the look and positioning of a document's text, graphics and objects.

- **Font** opens a menu with three tabs
 - **Font** sets the font type, style, size and color, underline style and color and effects
 - **Character Spacing** modifies the font's scaling, spacing, position and kerning
 - **Text Effects** do not appear on the printed page and hence are only useful for web pages
- **Paragraph** opens a menu with two tabs
 - **Indents and Line Spacing** sets the alignment, indentation and spacing, before and after the paragraph

- **Line and Page Breaks** sets the pagination parameters for the document
- **Bullets and Numbering** opens a menu with four tabs
 - **Bulleted** sets the graphic, font and positioning of a bulleted list
 - **Numbered** sets the style, font, position and numbering of a numbered list
 - **Outline Numbered** sets the style, font, position and numbering of a tiered outline
 - **List Styles** imposes a pre-programmed numbering style on selected text or headings
- **Borders and Shading** opens a menu with three tabs
 - **Borders** sets the type, style, color, width and application of top, bottom and side borders around a paragraph or selected text
 - **Page Borders** sets the type, style, color, width and application of top, bottom and side borders along the text boundaries of the page
 - **Shading** sets the color and pattern of shading of a paragraph, selected text, a table or selected cells within a table
- **Columns** sets the number and width of columns, the spacing between columns and the application of a line between columns
- **Tabs** sets one or multiple tab positions, alignment and leaders
- **Drop Cap** sets the position and other parameters for a drop cap, usually the first letter of the first word on the first page of a document, section or chapter
- **Text Direction** alters the direction of text within a Text Box

- **Change Case** alters the capitalization aspect of selected font
 - **Sentence case** capitalizes the first word of each sentence
 - **Lowercase** removes all capitalization from selected text
 - **UPPERCASE** capitalizes all letters in selected text
 - **Title Case** capitalizes the first letter of every word in selected text
 - **tOGGLE cASE** reverses the effect of the shift key; i.e., capitalized letters appear as lowercase and lowercase letters appear as uppercase

- **Background** is available only in Web Print Layout

- **Theme** applies a pre-designed template to the document comprising a background, heading formats and bullet formats. Although the background is only displayed in Web Print Layout, the heading and bullet formats will appear in Print Layout

- **Frames** will be addressed in **Lesson 4: Advanced Word Utilities**

- **AutoFormat** applies automatic formatting to the document, either as you type or after you type

- **Styles and Formatting** will be addressed in **Lesson 2: Managing Documents**

- **Reveal Formatting** opens the Reveal Formatting task bar

- **Object** sets the size, coloring, position and text wrapping for the selected object

Tools

The Tools menu contains a variety of basic, intermediate and advanced features. Most will be addressed in later lessons in this module.

- **Spelling and Grammar** checks the document for spelling and grammatical errors. It does **not** set the parameters for those errors
- **Language** sets:
 - The default **Language** is the one you set for your computer
 - **Translation** opens the Translation task bar
 - **Thesaurus** offers synonym and antonym suggestions for the selected word
 - **Hyphenation** toggles the hyphenation function and sets its parameters
- **Fix Broken Text** is a Unicode Support feature. For more information, go to <http://support.microsoft.com>
- **Word Count** provides the statistics of the document
- **AutoSummarize** will be addressed in **Lesson 4: Advanced Word Utilities**
- **Speech** toggles Word's built-in speech-recognition function. For more information, go to <http://support.microsoft.com>
- **Track Changes** will be addressed in **Lesson 4: Advanced Word Utilities**
- **Compare and Merge Documents** will be addressed in **Lesson 4: Advanced Word Utilities**
- **Protect Document** will be addressed in **Lesson 3: Managing Documents**

- **Online Collaboration** toggles MS Meeting. For more information, go to <http://support.microsoft.com>
- **Letters and Mailings** will be addressed in **Lesson 4: Advanced Word Utilities**
- **Tools on the Web** takes you to the Microsoft Office Online website in your default browser
- **Macro** will be addressed in **Lesson 4: Advanced Word Utilities**
- **Templates and Add-Ins** will be addressed in **Lesson 2: Customizing Word**
- **AutoCorrect Options** will be addressed in **Lesson 2: Customizing Word**
- **Customize** will be addressed in **Lesson 2: Customizing Word**
- **Options** will be addressed in **Lesson 2: Customizing Word**

Table

All **Table** menu functions will be addressed in **Chapter 4: Advanced Word Utilities**.

Window

- **New Window** opens up the current document in a duplicate window
- **Arrange All** opens all files in separate windows on the screen, making it easier to drag material from one document to another

- **Split** splits the active window into panes or removes the split. This allows you to move through the document in one pane while maintaining your place in another.

Word displays a list of open documents at the bottom of the **Windows** menu.

Help

- **Microsoft Word Help** turns on the Office Assistant
- **Hide the Office Assistant** turns off the Office Assistant
- **What's This?** displays screen tips for the selected menu feature or icon
- **Office on the Web** takes you to the Microsoft Office Online website in your default browser
- **Activate Product** takes you to the MS Word activation window
- **WordPerfect Help** provides a brief tutorial for WordPerfect users converting to MS Word
- **Detect and Repair** automatically detects and fixes problems with the MS Word program
- **About Microsoft Word** displays the version number of the program as well as copyright, system and other legal notices

Formatting Toolbar

The icons on the Formatting toolbar duplicate the more commonly used functions of the Standard toolbar menus. Rest your cursor on the icon to display its Screen Tip.

Feedback Exercise

This exercise will give you the opportunity to review what you learned in this lesson. Answer the questions below. You may refer to the text for help or additional information.

1. What menu functions open the Microsoft Office Online website in your default browser?

2. What menu function turns on Show Revisions when you are tracking changes in a document?

3. What menu function displays Styles and Formatting?

4. What menu function moves you to the next bookmark?

5. What is the advantage to using **Window: Split**?

6. In what menu is the hyphenation feature?

7. In what view can you insert a colored background?

8. What are the three tabs on the Borders and Shading menu?

9. What is the difference between cut and deleted text?

10. On what menu is Page Setup?

Lesson Conclusion

In this lesson you learned the fundamental components of the Standard toolbar and their corresponding Formatting toolbar icons. This basic knowledge will be utilized in later lessons in this module.

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