Herb Tyson
Microsoft Word MVP

Microsoft® Word 2010 Bible



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Herb Tyson



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This book is dedicated to my extraordinary daughter, Katie, who was killed in a car crash on July 2, 2009. Katie was the most incredibly talented, intelligent, and loving human being I've ever known, and Karen and I miss her each and every day. In her short 21 years, she touched the lives of many hundreds of people who knew her and loved her, and relied on her for her leadership and her deep compassion, empathy, and honesty. With wisdom beyond her time with us, I believe that her timeless soul continues. The work she began is being continued by the Katie Tyson Fund, which provides leadership training for youth and young adults.

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Herb Tyson is an economist and computer consultant and trainer in the Washington, D.C., area. He earned an interdisciplinary doctorate from Michigan State University in 1977, and an undergraduate degree in Economics and Sociology from Georgetown University in 1973.

He is the author of many computer magazine and ezine articles, as well as over a dozen computing books, including *Teach Yourself Outlook 2000 in 24 Hours*, *Word for Windows Super Book*, *Teach Yourself Web Publishing with Microsoft Word*, *XyWrite Revealed*, *Word for Windows Revealed*, *Your OS/2 Consultant*, and *Navigating the Internet with OS/2 Warp*. Herb is also joint author and technical editor for many other books.

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Herb is also a singer and songwriter, currently working on his second CD. He and his guitar are no strangers to musical venues in the Washington, D.C., area. He has performed at the Birchmere, the Kennedy Center, Jammin' Java, and coffeehouses, and is a frequent performer at the Mount Vernon Unitarian Church (where he serves as webmaster).

You can visit Herb's website at `www.herbtyson.com`. Questions about this book and Microsoft Office can be pursued at Herb's Word blog, at `word.herbtyson.com`.

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Introduction

Welcome to the *Microsoft Word 2010 Bible*. Like all books in the Bible series, you can expect to find both hands-on tutorials and real-world practical application information, as well as reference and background information that provides a context for what you are learning. This book is a comprehensive resource on Word 2010 (also known as Word 14). By the time you have completed the *Microsoft Word 2010 Bible*, you will be well prepared to take full advantage of the numerous ways that Word has been enhanced and strengthened.

The update to Word 14 is evolutionary, rather than revolutionary (unlike the update to Word 12). Along with new features that can make working with Word easier, Microsoft has restored a couple of oldies-but-goodies, including the ability to customize the ribbon (the menu's successor) and AutoComplete for AutoText. Nice touches, like the Navigation pane, provide ever more and better ways to work with words, and to organize them more effectively and efficiently. Word 14 also provides more ways to collaborate and share, including co-authoring — finally, an answer to having to e-mail tracked changes back and forth. With Office 14 comes SharePoint Workspace 2010, which provides three ways not only to share your documents, but ways to make your work environment more portable, so you spend less time copying files to and from thumb drives and more time working.

Who Should Read This Book

The *Word 2010 Bible* is a reference and tutorial for Word users of all levels. For the user who is completely new to Word, this book will tell you everything you need both to quickly start using Word 2010 and to get the most out of the features it offers. Word 2010 is a full-service word processing program that can do just about anything you need it to do. Often, there are multiple ways to accomplish a given task. This book will show you the quickest and easiest ways to accomplish your mission, while at the same time pointing out the longer term advantages of using methods better suited to extensibility and repurposing your work.

For veteran users of Word 2003 and earlier, the *Word 2010 Bible* will help you quickly see how to accomplish familiar tasks using unfamiliar tools. Where new and old ways co-exist, this book will help you decide which method to use. Where the old ways have completely disappeared, this book will help you deal with the initial shock and grief, and then help you move on and grow from the experience. That's what a bible does.

For users who made Word 2007 part of their journey, this book helps you continue the trek, showing you what's new, improved, and different in Word 2010. Sometimes, new and improved

coincide, but sometimes, you just end up with different. I'll try to help you take advantage of what the new Word 2010 can do for you.

For new and veteran Word users alike, this book assumes that you have a basic level of computer literacy. It assumes that you're familiar with Windows, that you know what *click*, *drag*, and *double-click* means. It also assumes that you're familiar with basic Windows-wide techniques for selecting, copying, and deleting text. Furthermore, this book assumes that you know the difference between Internet Explorer and Windows Explorer, and that you know where and what the Windows taskbar and desktop are.

Because this book would be twice as long if I had to describe each scenario from the perspective of different versions of Windows, I chose one version as my focus — Windows 7. If you're using Vista, upgrade to Windows 7. You won't regret it. If you're using Windows XP with the needed service pack to run Office 2010, that's okay, but you'll need to translate some things back into XP-ese. But, since you've been using XP for so long, I'll assume that's no problem.

How This Book Is Organized

The *Word 2010 Bible* is organized in a way that reflects both the way users tend to learn Word as well as the relative timing when particular kinds of information and techniques are needed. This book is organized into nine parts. The first four parts are designed to get you up-and-running as quickly as possible, covering things you need to know to start using Word immediately. However, the early parts of the book not only show you the basics, but also offer tips and strategies that will enable you to become an effective Word user. Topics and techniques covered in the early chapters are revisited throughout the *Word 2010 Bible*. You'll quickly gain an understanding of how some concepts — such as Heading styles — give you incredible leverage and easy access to sophisticated word processing techniques and features.

Part I: My Word and Welcome to It

Part 1 begins with things you need to know in order to become comfortable and fully proficient with Word 2010. The mission of this collection of chapters is to get you over any initial stumbling blocks so you can begin to take advantage of Word 2010's power and enhancements. Part I offers a quick-start chapter especially useful for newbies. For Word veterans, there's a chapter explaining how to find features that otherwise appear to be missing in action. To prepare you to be the kind of power user the *Word 2010 Bible* knows you can be, Part I offers chapters on making Word work for you, understanding Word's new file format, and how to tame and control Word's automatic features.

Part II: Word on the Street

Part II focuses on the baseline skills that every Word user uses and needs — regardless of why you use Word. The basics are covered thoroughly, but the Bible avoids spending too much time on things that are already obvious. However, beyond that and more importantly, this section contains a heavy dose of tips, pitfalls, and shortcuts. You'll learn about the different kinds of

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formatting, the importance of styles, as well as tricks and the how-to's of the Office 2010 Clipboard and Word 2010's industrial-strength find and replace tools.

Part III: Writing Tools

Part III focuses on aspects of Word that can make your word processing life heaven or hell. If Word suddenly starts doing the unexpected, or automatically corrects things that aren't mistakes, you might want to pull your hair out (it's too late for the author's much diminished scalp). In Part III, you'll learn how to use Word's cadre of writing tools to their best advantage, how to tame automatic annoyances, and how to recover from well-intentioned accidents caused by Word trying to outsmart you. Part III covers language tools, Quick Parts (the umbrella for AutoText), AutoCorrect, and AutoFormat.

Part IV: More Than Mere Words

It takes more than words to make a document. Part IV details the many kinds of elements you can include in documents, and shows you how to decide what to use and when to use it. This is important because there often are several different ways to solve any given problem, and you need to know how to decide which approach to use. The *Word 2010 Bible* covers the basics first, and then provides extra emphasis on features that may be tricky or potentially confusing. In Part IV, you'll learn how to insert all kinds of things, from tables and pictures to charts and objects.

Part V: Document Design

Part V focuses on how documents are put together, as well as special considerations that depend on the ultimate destination of the document. You'll learn what you need in order to turn out professional reports, newsletters and brochures — and other specialized document formats. Part V covers page setup, textboxes, column formatting, and page background formatting. You'll be cautioned about using Word to create HTML. You also discover relatively new capabilities, such as Word's ability to create PDF and XPS files. If you don't know what those are you'll learn that, too.

Part VI: With All Due Reference

Part VI covers those elements typically used in what people call *long documents*. We'll revisit Master Documents — long the target of derision (and rightly so) and a continuing source of document corruption. Part VI also ventures into the wonderful worlds of bookmarks, indexing, hyperlinks, tables of contents (and other tables), footnotes, endnotes, citations, and Word's bibliography feature. If you've used information in one place, this chapter will show you how to reuse that information elsewhere in a variety of purposeful and powerful ways.

Part VII: Getting Out the Word

Part VII deals with specialized output formats, such as envelopes, labels, form letters, catalogs, and directories. It starts with identifying and creating data sources. Once you've identified and

correctly dealt with your data source, the rest of what you do is made much easier. There are a lot of vestigial features in Word, some of which nostalgic Word users might find easier, faster, and more direct than Word's new cadre of tools. Where the Old Ways still exist, you'll learn how to find them and use them, as well as how to make them more accessible.

Part VIII: Power and Customization

Part VIII looks at the kinds of customizations users can make using Word's interface — not just the keyboard and the QAT (Quick Access Toolbar), but now the ribbon, as well. Part VIII shows you the many ways in which you can hone Word's options and settings to match your own style of working. You'll also learn how to create basic macros. The focus here is to show you how to automate repetitive chores, not how to write full-blown VBA programs. By the end of Chapter 49, you will be able to use the macro recorder to create power-user editing aids.

Part IX: Collaboration – Getting Along with Others

In Part IX, you'll learn about Word's and Office's collaboration tools, including co-authoring, comments, tracking (also called redlining), and how to deal with the feistier questions of document changes from a variety of different sources. One of the most confusing areas of Word historically has been its security settings — confusing because the settings aren't all in one place. In Part IX, you'll learn where the different haystacks are and where the various needles are hidden. You also learn about important changes to Word with respect to SharePoint Server, as well as a vital new tool for collaborators — SharePoint Workspace (which replaces the Groove client, and adds new capabilities). Also covered in this part is integration with other Office applications, such as Outlook, Excel, and PowerPoint.

Conventions and Features

There are many different organizational and typographical features throughout this book designed to help you get the most of the information.

Tips, Notes, and Cautions

Whenever I want to bring something important to your attention the information will appear in a Tip, Note, or Caution.

Tip

Tips generally are used to provide information that can make your work easier — special shortcuts or methods for accomplishing something easier than the norm. ■

Note

Notes provide additional, ancillary information that is helpful, but somewhat outside of the current presentation of information. ■

Caution

Cautions provide information about things to watch out for, whether simply inconvenient or potentially hazardous to your data or systems. ■

Minimum Requirements

The absolute minimum system requirement for Microsoft Office are as follows:

Computer and processor	500 megahertz (MHz) processor or higher
Memory	256 megabyte (MB) RAM or higher
Hard disk	1.5 gigabyte (GB); a portion of this disk space will be freed after installation if the original download package is removed from the hard drive.
Display	1024 x 576 or higher resolution monitor
Video card	Pixel Shade 20 and Vertex Shader 2.0. Driver date later than November 1, 2004, and WHQL certified.
Operating system	Microsoft Windows XP with Service Pack (SP) 3, 32-bit, Windows Vista with SP1, Windows Server 2003 R2 with MSXML 6.0, Windows Server 2008 with SP2 (32-bit or 64-bit), Windows 7 or later (32-bit or 64-bit)
Other	• Co-authoring requires Microsoft SharePoint Foundation 2010 or SkyDrive, and might require more memory. • Grammar and contextual spelling in Word 2010 is not turned on unless the computer has at least 1 GB memory.

Note that these are the absolute *minimum* requirements. If you just meet these, you can expect *minimal* performance. Realistically, your computer should have 2GB of RAM at the very least, and 4GB or more is preferred. If your processor isn't at least a dual-core or equivalent, Office 2010 won't *run* on your system; it will *crawl*.

If you plan to install both Word 2007 and 2010 on your 64-bit version of Windows, you must install the 32-bit version of Office 2010 (unless you're using a virtual solution, in which case, you aren't reading this section of the book). The 64-bit version of Office 2010 cannot be installed at the same time as Office 2007, which comes only in the 32-bit flavor.

Where to Go from Here

Will the *Word 2010 Bible* get you into heaven? Well, perhaps not *that* heaven, but if having a solid working knowledge of Word 2010 and a bag filled to the brim with tips, tricks, and techniques to make your Word life easier is your idea of heaven, then this book will get you through the front gate. If being an accomplished Word user or a Word expert is something that your job requires or something that will make you better able to do your job, then reading the *Word 2010 Bible* and taking its various commandments to heart will take you where you want to go.

Of course, no book can possibly tell you everything you're ever likely to need to know about any one computer program. With tens of millions of users around the world using Word 2010, there are going to be things that even the *Word 2010 Bible* can't anticipate. When you come up against a problem that boggles your mind, there are places you can go and resources you can tap.

Some of the most useful resources are Microsoft public *communities* or *newsgroups*. These communities are visited by millions of users, and are frequented by thousands of experts with many combined years of experience in using Microsoft Office and solving problems in ways that are efficient, effective, creative, and often novel. To tap this vast free resource, begin here: `www.microsoft.com/communities`

Other tremendous free online resources are the many FAQs and articles created by Microsoft's huge corps of volunteer technical experts known as Most Valuable Professionals. To learn more about Microsoft's MVP program, visit:

`http://mvp.support.microsoft.com`

A wealth of helpful content has been assembled by these volunteers in a website that is independent of Microsoft and maintained by MVPs. To begin utilizing the Word-specific offerings, visit:

`http://word.mvps.org/`

If you have comments or suggestions for improving the *Word 2010 Bible*, please don't hesitate to contact Wiley at :

`www.wiley.com`.

Finally, if you have specific questions about Word 2010, please feel free to post them on my *Word Bible* blog:

`http://word.herbtyson.com/`

Part I

My Word, and Welcome to It

The post-Word 2003 world is different. Part I's mission is to get you past the differences and up and running with Word 2010. This section offers answers to questions such as "Why did they change it?" and "How do I do what I used to do?"

Part I begins with things you need to know and want to know about Word 2010. Chapter 1 explains the post-Word 2003 interface and why Microsoft chose to radically overhaul Word's look and feel. Chapter 2 offers a quick start, showing both beginning and seasoned Word users how to start Word and use its many facets. Chapter 3 is targeted at veteran pre-Word 2003 users who might feel a little lost in the maze of new methods and features. Chapter 4 offers the best advice the author can give you about how to get the most out of Word by using styles and taking advantage of power user techniques. Chapter 5 demystifies Word's `.docx` file format, explaining why and how it's different from Word's legacy `.doc` format. Finally, Chapter 6 tries to anticipate your reaction to certain "helpful" features by showing you how to tame or take advantage of Word behaviors that you might consider annoying.

IN THIS PART

Chapter 1
Brave New Word

Chapter 2
Quick Start

Chapter 3
Where in the Word Is . . . ?

Chapter 4
Making Word Work for You

Chapter 5
The X Files — Understanding and Using Word's New File Format

Chapter 6
Make It Stop! Cures and Treatments for Word's Top Annoyances

CHAPTER 1

Brave New Word

Welcome to 2010. Word 2010, that is. If you came here from Word 2007, changes will seem evolutionary. If you arrived from Word 2003 or earlier, the changes are more **r**evolutionary. This chapter provides an overview of what's new — changes since Word 2007 and changes since Word 2003.

If you're completely new to Word and have been using another Windows word processor such as WordPerfect or OpenOffice, you're likely more accustomed to toolbars and menus than you are to Word 2010's ribbons, so when I contrast Word 2010's ribbons with pre-Word 2003's interface, you'll likely immediately grasp just how different the ribbon is, even if you never touched Word 2003.

The *ribbon* is a set of contextual tools designed to put what you need where you need it when you need it. When you click one of the major *tabs* on the ribbon, the tools you need for specific tasks should mostly be right where you need them. The ideal result is that you don't need to go looking for what you want.

In fact, the ribbon might actually be considered a kind of toolbar. Instead of a list of different toolbars accessed from the View menu, however, the different parts of the ribbon are organized into tabs and groups. The result is that more of the tools are exposed to you, making it more likely that you'll discover what you need. At least that's the theory.

If you've used Word 2003 or earlier versions in the past, Word 2010 will seem strange and different. Imagine that you left Earth in the year 1994 — the last time Word's interface was overhauled — and returned in

IN THIS CHAPTER

Discoverability

The "results-oriented" interface

Ribbons and other new things

Backstage view

Reviewing your options

the year 2010. Over the ensuing sixteen years, Word for Windows 6 had gradually evolved into Word 14 (Word 2010), slowly transitioning from menus and toolbars to the ribbon.

When considered from that evolutionary perspective, perhaps Word 2010 doesn't look so different. What you, the space traveler, do not realize, however, is that the radical changes occurred not slowly and gradually over more than a decade, but in one giant leap from Word 11 to Word 12, three years before you landed. You're not aware of the "missing link" (Word 2007). Never mind why there was no Word 13.

Discoverability

If pre-2003 versions of Word were driven mostly by *functionality* and *usability*, Word 2010's catchwords are *discoverability* and *results*. Studies show that typical Word users use only a fraction of the myriad features contained in Word. Yet the same studies show that users often employ the wrong features. For example, rather than use an indent setting, a user might press the spacebar five times (gasp!) or the Tab key once (again gasp, but not quite as loud).

Microsoft's challenge, therefore, was to design an interface that made discovering the right features easier, more direct, and more deliberate.

Has it succeeded? Well, you'll have to be the judge.

Let's suppose you want to create a table. Assuming for the moment that you even know that a table is what you want, in Word 2003 and earlier you might choose Table ➪ Draw Table or Table ➪ Insert ➪ Table from the menu. Or perhaps you would click the Table tool on the Standard toolbar, assuming you recognize the icon as representing that functionality.

The point is that you had to navigate sometimes dense menus or toolbars in order to find the needed functionality — perhaps not even knowing what that functionality was called. It's akin to wandering through a hardware store looking for something that will twist a spiraling piece of metal into a piece of wood, without knowing whether such a tool actually exists. You don't even know what the piece of metal is called, so you wander about, and finally discover, to your utter delight, the perfect tool . . . a hammer. Oops! There's an old saying: When the only tool you have is a hammer, everything looks like a nail.

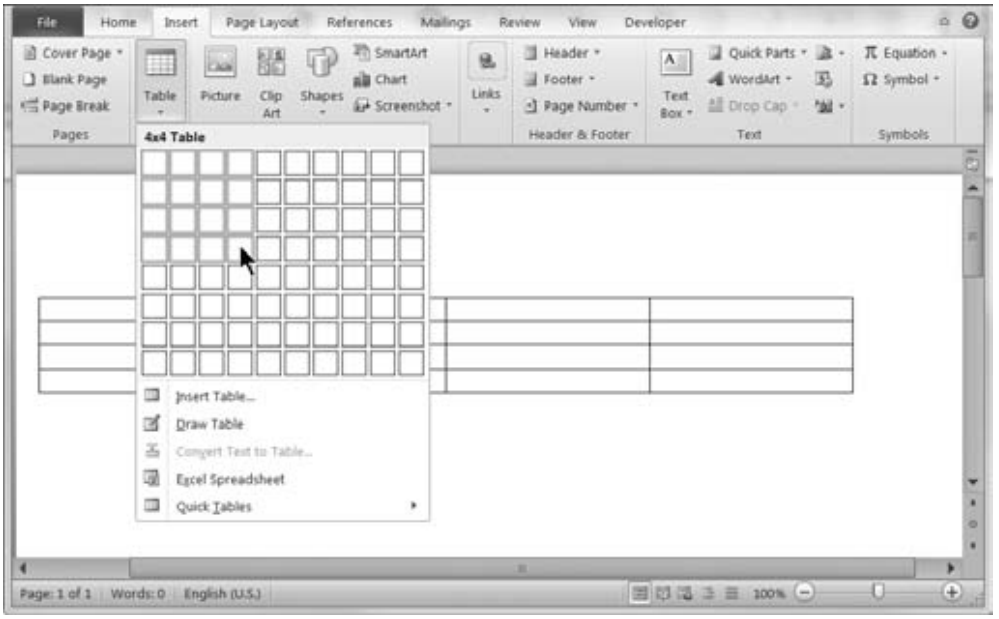
Like a hammer, the time-proven spacebar has been used countless times to perform chores for which it was never intended. Yes, a hammer can compel a screw to join two pieces of wood together; and a spacebar can be used to move text around so it looks like a table. However, just as a hammered screw makes for a shaky wooden table, a word processing table fashioned together with spaces is equally fragile. Add something to the table and it doesn't hold together. Which table? Take your pick.

In Word 2010, there are no dense menus and toolbars. To insert a table — again assuming you even know a table is what you're looking for — you stare at the Home ribbon and see nothing that looks remotely like a table.

Thinking that the act of inserting may be what you need, you click Insert, and there you see a grid with the word Table under it. You click Table, move the mouse, and perhaps you see what's shown in Figure 1-1, as an actual table is previewed inside your document, changing as the mouse moves. Epiphany! Well, maybe just "Yay!"

FIGURE 1-1

Word's ''live preview'' shows the results of the currently selected ribbon action.



If you've ever spent endless hours wrestling with a document because its numbering is haunted by ghosts that won't let you do what you need to do, you might find relief in Word 2010. More on this in Chapter 5, but for now you might be happy to know that pre-Word 2007's proprietary `.doc` document format was replaced by `.docx`, which uses XML (eXtensible Markup Language). XML is an open format in the public domain. At its heart are plain-text commands that can be resolved by Word and a variety of other programs. The bottom line for the user

is that the mysterious so-called *binary* format is gone, meaning that Word documents are now harder to corrupt. If they do get corrupted, your work is easier to salvage.

Note

If you're a glutton for punishment or you like taking risks, Word 2010 still supports its legacy formats. You can even tell Word to always save documents in earlier formats. This is a good option when you share your work with users of Word 2003 and earlier. For those same Word 2003 users (as well as Word 2000 and 2002 users), however, Microsoft provides a free compatibility pack that enables them to read and write Word 2010 documents (although Word 2010-specific enhancements will be lost in the translation). To find the compatibility pack, visit `http://office.microsoft.com` and search the Downloads tab for "compatibility." ■

The "Results-Oriented" User Interface

If you're like most users, when you begin a letter or a report, the first thing you do is check whether you've ever written a letter or report like the one you are about to write. If you have written something similar, then you very likely will open it and use it as a starting point.

If you don't have a document to use as a starting point, then you check whether there's an existing template in Microsoft Word's repertoire. Failing there, you might search online. Indeed, it's not uncommon to come across questions in online communities or newsgroups asking if anyone has a particular type of template, e.g., "Does anyone have a template for a resignation letter?" I just love replying to that kind of request: *Dear meat-for-brains boss* . . . but I digress.

Knowing that most people don't prefer to begin documents with a clean slate, so to speak, Microsoft designed Office to give users what they want. The goal is to offer them a collection of the results they are probably seeking, to save time and guesswork.

Microsoft has done this in a variety of ways. One of the most prominent is to provide galleries of already formatted options. Coupled with this is something called *live preview,* which instantly shows the user the effect of a given option in the current document — not in a preview window!

Rather than focus on a confusing array of tools, Word instead shows a variety of finished document parts or building blocks. It then goes on to provide context-sensitive sets of effects — also tied to live preview. These are designed to help you sculpt those document parts into, if not exactly what you want, then something close. The objective at each step is to help you achieve results quickly, rather than combing through myriad menus and toolbars to discover possibilities. If nothing else, the interface eliminates several what-if steps in what necessarily is a process of trial and error.

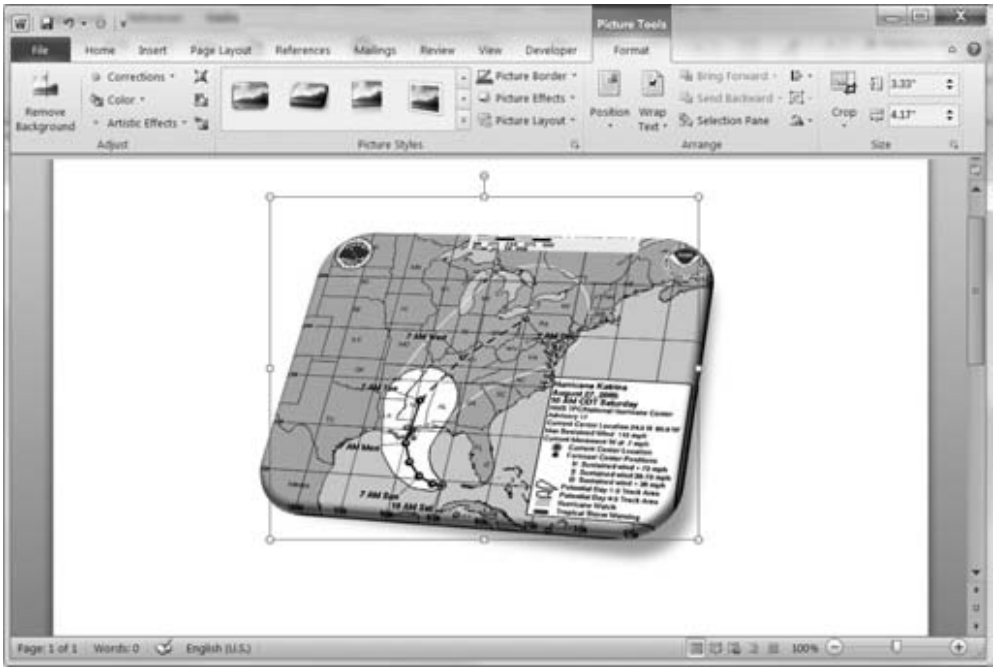
In addition, with each result Word's context-sensitive ribbon changes to show you additional tools that seem most likely to be appropriate for or relevant to the document part that is

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currently selected. For example, if a picture is selected, the Picture Tools ➪ Format ribbon is displayed, as shown in Figure 1-2.

FIGURE 1-2

A picture is selected, and the Picture Tools ➪ Format ribbon is displayed; the result of the Picture Style gallery selection (Bevel Perspective, in this case) is previewed in the document.

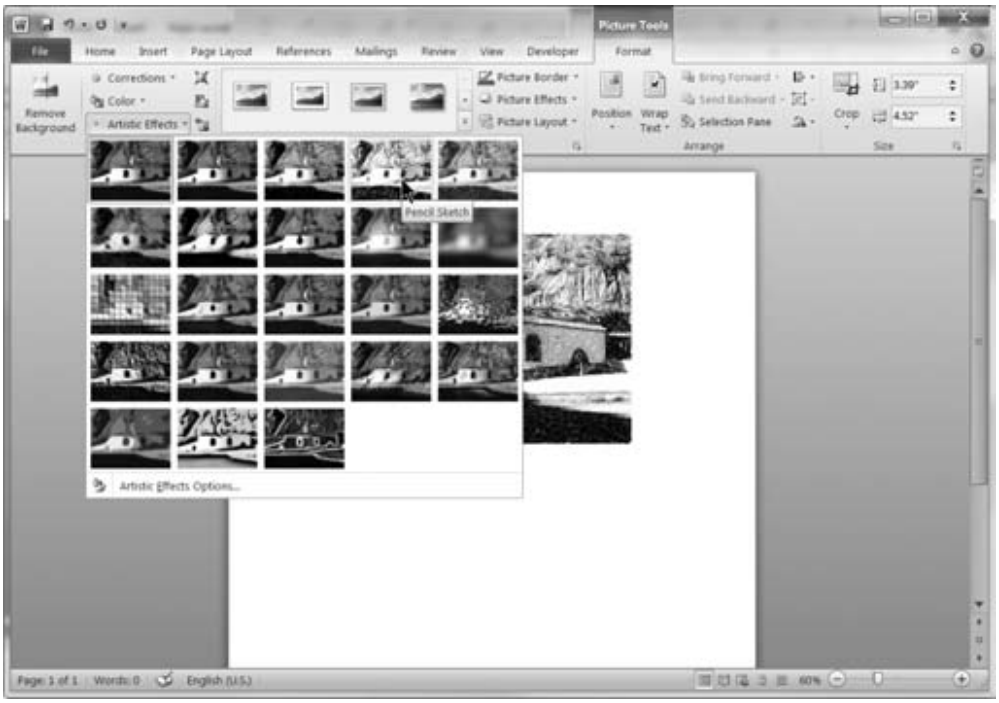


With each action Word displays a likely set of applicable tools on the ribbon. Tools provided include a number of *galleries*, which contain sets of ready-to-use options — I'll have more to say about galleries later. As the mouse pointer moves over different gallery options, such as the picture styles shown here, the image in the actual document shows a live preview of the effect of that choice. As you navigate the ribbon to additional formatting options and special effects, the live preview changes to reflect the currently selected choice, as shown in Figure 1-3.

In addition to providing a live preview of many formatting options, Microsoft has also greatly enhanced and expanded the range of different effects and options. The result, optimally, is documents that look more polished and professional than was possible previously.

FIGURE 1-3

Live preview shows the result of the selected formatting or effect.



Ribbons and Things

At the heart of Office 2010's results-oriented interface is the ribbon. The ribbon is the area above the document workspace, as shown in Figure 1-4. Technically, I suppose, the ribbon is just the area below the tabs for Home, Insert, and so on. The row containing these tabs controls which ribbon is displayed.

FIGURE 1-4

Word 2010's ribbon, shown in Home position on a 22-inch monitor with normal resolution



Exactly what you see in any given ribbon is determined by a number of factors, including the size of your monitor, your screen resolution, the size of the current Word window, and whether you're using Windows' display settings to accommodate low vision. Hence, what *you* see might

not always be what is pictured in this book. If you have a very large monitor operating at comparatively high resolution, at most you will see the entirety of the Home ribbon, shown in Figure 1-5.

FIGURE 1-5

At the highest resolution and largest screen size, Word's ribbon displays additional gallery options and text labels.



Note

This Home ribbon view shows 16 styles from the style gallery, as well as additional tools and text labels in the Clipboard and Editing groups. This is the maximum amount of information you will ever see in the Home ribbon. For this picture to be "shot" Word was stretched across two 22-inch monitors, and additional detail stopped appearing when Word was 37 inches wide. Therefore, if you're wondering whether you need a 52-inch monitor for Word 2010, you'll be happy to know that a 42-inch model will work just fine. ■

Tip

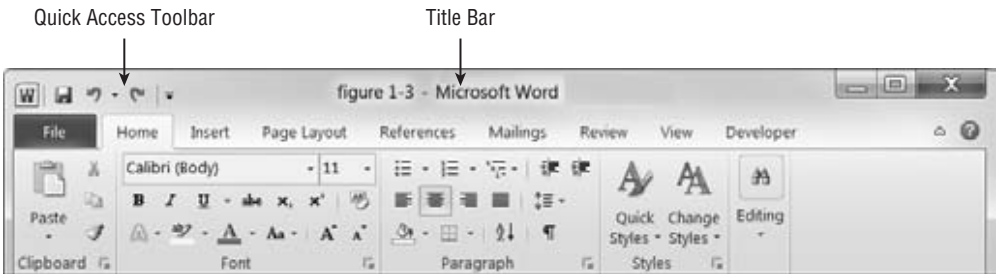
Ctrl+F1 toggles the ribbon on and off. At times the ribbon is going to look overly large to you. It will also seem imposing when you're simply reading a document or when you're trying to see a graphic and write about it at the same time. The ribbon might also be distracting if all you're doing is composing, and are fluent in the keystrokes you need to perform basic formatting. For those times, there is Ctrl+F1. To turn the ribbon off using the mouse, double-click the current tab; click any tab to turn it back on temporarily. It will automatically hide when you're done using it. Double-click any tab or press Ctrl+F1 to turn it back on full-time. ■

Title Bar

The top bar of the Word window is called the *title bar*, exhibited in Figure 1-6. Double-clicking the title bar toggles Word between maximized and restored states. It's the equivalent of alternately clicking the maximize and restore buttons.

FIGURE 1-6

The title bar



The title bar contains the *Quick Access Toolbar (QAT)* (optionally), the name of the document in the current Word window, and what Windows calls the *application control caption buttons* (the tools for maximizing, minimizing, restoring, and closing application windows). If you've told Word not to "Show all windows in the Taskbar" (File ➪ Options ➪ Advanced ➪ Display section), then these caption buttons control all of Word, rather than just the current document window. In your own case the title bar might contain other elements as well, such as items placed there by various Word and Windows add-ins.

Tip

Right-click different areas of the title bar for available options. For example, if you right-click the Quick Access Toolbar you'll see that it can be customized or placed below the ribbon; any tool on it can be instantly removed as well. If you right-click the middle area of the title bar you'll see that the caption button options (Move, Size, Minimize, etc.) are available here as well. You can also access them from within Word by pressing Alt+spacebar. ■

The Home Row

Shown below the title bar in Figure 1-6 is the home row. I'm not sure if that's the official name, but that's the name I'll use here. In addition to the tabs themselves, which control which ribbon is displayed, this line contains the document control caption buttons, and the Help button (which replaces Help ➪ Microsoft Word Help from Word 2003 and earlier). If you've told Word to "Show all windows in the Taskbar" (File ➪ Options ➪ Advanced ➪ Display section), the separate document control caption buttons will not be present. The tabs can be accessed via the mouse or hot keys. Unlike in menu-based Windows applications, however, there are no underlined letters showing you the hot keys.

As noted earlier, double-clicking the currently selected tab hides the ribbon. Double-click any tab to unhide it. Ctrl+F1 toggles the ribbon on and off as well. Once the ribbon has been turned off, you can temporarily turn it back on by clicking a tab (or pressing its hot key). Once you've used a tool in that tab, the ribbon automatically goes back into hiding.

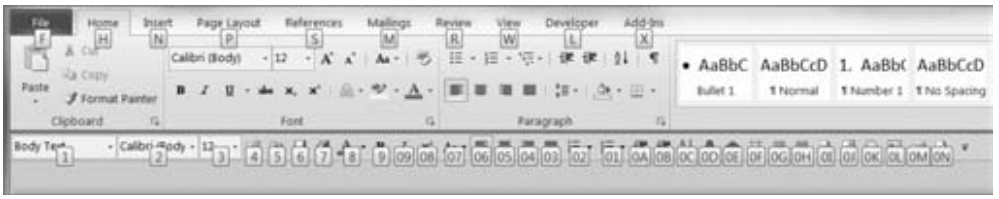
KeyTips

If there are no underlined letters, how do you know which keys to press? Tap the Alt key. As shown in Figure 1-7, when you tap the Alt key, shortcut keys that work in the current context are displayed. "In the current context" might seem like an odd way to phrase it. Why context is relevant will become clear when we talk more about the Ribbon (described in the following section). For now, however, if you're working in a Word document, pressing Alt+H will display the Home ribbon tab, Alt+N the Insert ribbon tab, and so on.

Note that I've added some additional tools to the QAT shown in Figure 1-7, and that numbered hot keys are associated with them. In addition to the first nine being accessible via Alt+1 through Alt+9, the last three are accessible via Alt+0L, Alt+0M, and Alt+0N.

FIGURE 1-7

Tap the Alt key to display Word's context-sensitive hot keys.



Ribbon

The ribbon is divided into a number of different tabs that ostensibly correspond to Word's former menu. Unlike with Word 2003's menu, however, there are no expanded drop-down lists under each main menu item. Instead, each tab exposes a different ribbon. Note that in Figure 1-4, the Home ribbon is exposed. Contrast that with Figure 1-8, which displays the Insert ribbon.

FIGURE 1-8

Each of the tabs exposes a different ribbon; the Insert ribbon is shown here.



Note that the number of ribbon tabs you see also varies according to user settings. In Figure 1-8 you can see the Developer and Add-Ins tabs. In your own setup, these tabs might not appear. Why the visible tabs vary is covered in luxurious detail in Chapters 47 and 48.

Groups, or Chunks

We've already talked about the Ribbon — now it's time to explore a few tricks and some odd nomenclature. At the bottom of the ribbon shown in Figure 1-7, note the names Clipboard, Font, and Paragraph. These are known as *groups,* or *chunks*. Each contains individual tools or controls.

If you're a veteran Word user — perhaps even if not — you've probably been wondering what to do, for example, if the Ribbon is displaying the Page Layout ribbon, and you really want to access the Home ribbon's Editing tools (the ones that contain Find, Replace, Go To, and Select).

In pre-Word 2007 incarnations of Word, access to commonly used commands was always available via the menu, and often via the Standard and Formatting toolbars. Indeed, these commands are always available in Word 2010 as well, sort of. When the Page Layout ribbon is displayed, you can access any of the Home ribbon items simply by pressing Alt, H (in sequence), or by clicking the Home ribbon.

What if you want to remain focused on Page Layout?

Any item on the ribbon — individual tools, groups/chunks, and even dialog box launchers — can be added to the QAT. For example, right-click Bold and choose Add to Quick Access Toolbar. Now Bold will be available all the time, regardless of which ribbon is displayed. Did I mention that Q stands for Quick? Don't want Bold there? Right-click it and choose Remove from the Quick Access Toolbar.

Let's try another navigation trick. Tap Alt+P (Page Layout ribbon). Now press the arrow keys. If you're unsteady with the mouse, you can use the four arrow keys to navigate. You can also use Tab and Shift+Tab to move forward or backward through all the ribbon commands. When you get to a command you want to use, press either the spacebar or the Enter key.

Note

In the previous section I mentioned that hot keys are context-sensitive. Shouldn't they work the same way all the time? One would think so. Alas, Microsoft does not agree, so while Alt+1 might activate the first QAT command when you tap the Alt key, you cannot count on its always doing the same thing. If you press Alt+H, now the Alt+1 key applies bold formatting. Hence, context is vital. If you're a touch typist who hardly ever looks at the screen, good luck. Meanwhile, press Alt+P and try not to laugh (or cry) when you notice that some commands have two — not one — hot keys. Any idea why AY means Rotate? Me neither. ■

Contextual Tools

In addition to the default set of seven main tabs, additional context-sensitive or *contextual tabs* appear depending on what kind of document part is selected. For example, if you choose Insert ➪ Header and insert a header from the Header gallery, the Header & Footer Tools' Design subtab is displayed, as shown in Figure 1-9.

Notice that because this particular header format is enclosed in a table, the Table Tools tab is also exposed. The Table Tools tab has Design and Layout subtabs, each of which is also available in the current view.

Tip

As you are becoming acclimated to Word 2010, whenever a new tab is exposed, you should click it to explore what it has to offer. Think of them as hidden drawers that might contain money! This is an aspect of Office 2010's *discoverability*. If you don't like the design choice in a given gallery, you very likely can change it (and even add new or changed items to the gallery for future use — more on this later). ■

Quick Access Toolbar

If you are a veteran pre-Word 2007 user, you might be asking, "Where have all the toolbars gone?" If you are a longtime veteran, in fact, you might be screaming that question at the top of

your lungs, perhaps adding a colorful adjective or two. All of the toolbars have been collapsed into the single and less flexible Quick Access Toolbar, or QAT as it is rapidly becoming known. (The exact pronunciation is still being debated.) Shown above the ribbon in Figure 1-10, the QAT can also be placed below the ribbon, where there is more room.

Note

If you have custom templates that rely heavily upon carefully crafted custom toolbars and menus, there's good news and bad news and good news. The good news is that some of those toolbars might actually still work in Word 2010 if you upgraded from Word 2003. Look for them in the Add-Ins ribbon. The bad news is that Word 2010 no longer contains customization tools that let you create and modify multiple toolbars. The good news, however, is that in Word 2010 you *can* customize the ribbon. ■

FIGURE 1-9

When a header is selected, the Header & Footer Tools' Design subtab and associated ribbon are selected.

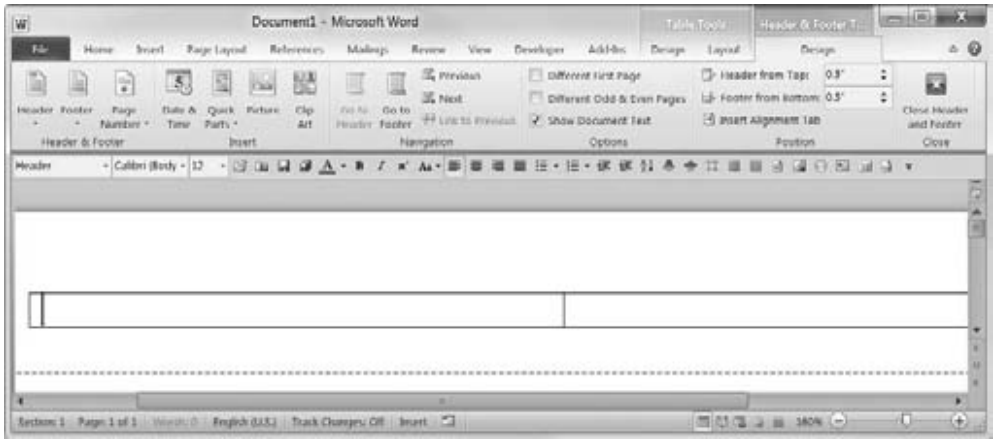


FIGURE 1-10

The Quick Access Toolbar (QAT) provides quick access to user-selected tools.



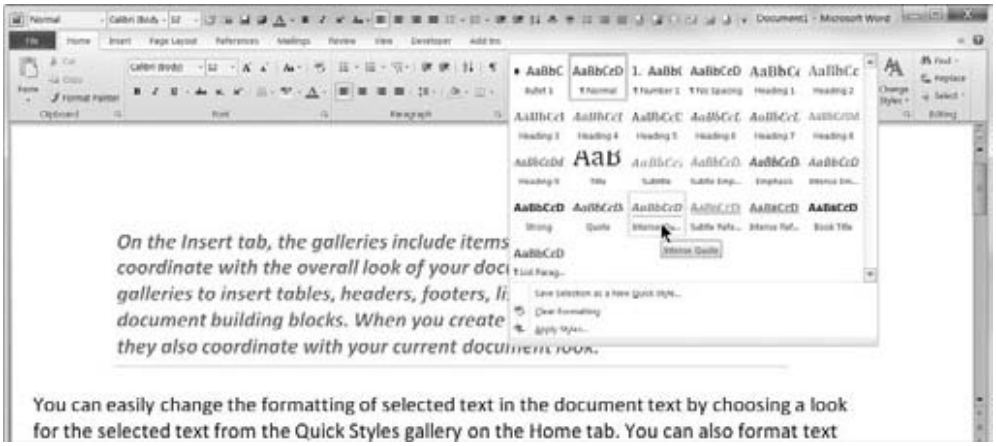
Live Preview

Live preview applies the highlighted gallery formatting to the selection in the current document, enabling you to instantly see the results without actually having to apply that formatting,

as shown in Figure 1-11. As the mouse pointer moves among the different gallery options, the formatting displayed in the body of the document instantly changes.

FIGURE 1-11

Live preview, showing the results of the Intense Quote style applied to the current paragraph



Note that not all galleries and formatting options produce live preview results. For example, in the Page Layout ribbon, none of the Page Setup items produces live previews, nor do the paragraph settings on that ribbon.

Another time you won't see live preview is when working with dialog boxes, such as the Paragraph dialog box. Many of those offer internal Preview panels, but do not take advantage of Office 2010's live preview capability.

A gotcha in all this newfangled functionality is that sometimes the gallery itself covers up all or part of the live preview. This gets old quickly, and can negate much of live preview's functionality, unless you're blessed with lots of screen real estate. Maybe that 52-inch monitor isn't such a bad idea after all.

Fortunately, some galleries and controls have draggable borders that enable you to see more of what you're trying to preview, as shown in Figure 1-12. If a control's border is draggable, this is indicated by three dots. Notice the three dots in the lower right corner of the Style gallery in Figure 1-11, and in the bottom border of the Fonts drop-down in Figure 1-12. On the lower right corner, the three dots indicate that the border can be rolled up and to the left. On the bottom, the three dots indicate that the border can be rolled up.

Sometimes, however, it's easiest simply to go ahead and apply the formatting, rather than jump through hoops. If necessary, you can always use the venerable Ctrl+Z (Undo) if you don't like the result.

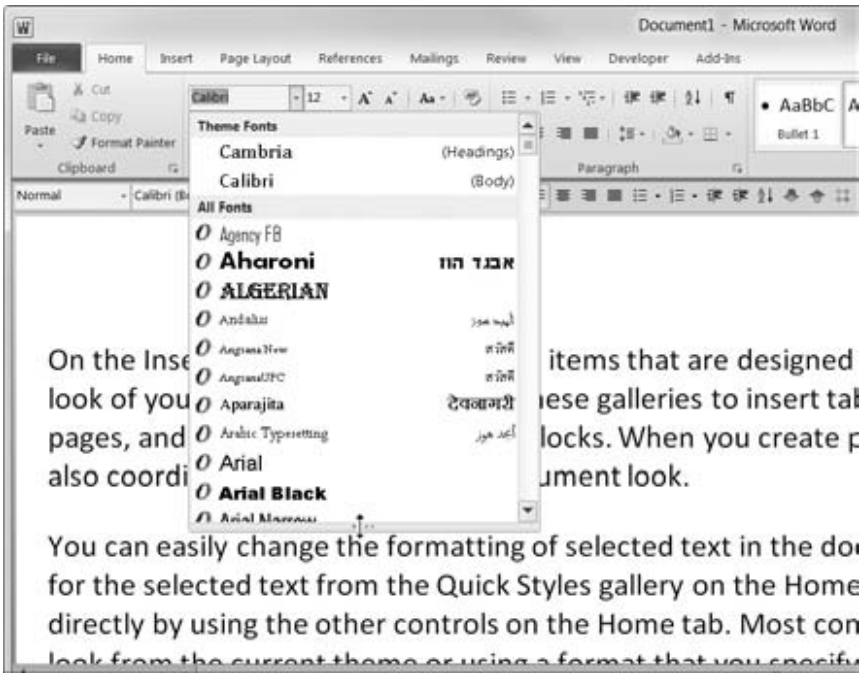
Caution

When using live preview, it's very easy to forget to click the desired gallery or formatting command when you come to it. Particularly in extensive lists (such as lists of fonts, colors, or styles), it's possible to get

exactly the right effect without noticing what it's called. In the case of colors, you usually don't even have a name to use as a guide. Sometimes, the hand really *is* quicker than the eye. Once you move your mouse away from your selection, it's lost. You might have to re-inspect that entire list to find exactly what you already found, so once you find what you're looking for, don't forget to click! Ctrl+Z is your friend! ■

FIGURE 1-12

Some live preview controls can be rolled up to reveal document details that otherwise would be covered.



Galleries

Up to now, I've thrown around the word *gallery* as if it were a common everyday word. Well, it is — but it's taken on expanded meaning in ribbon-oriented Word. Simply put, a gallery is a set of formatting results or preformatted document parts. Virtually every set of formatting results or document parts in Word 2010 (indeed, in all of Office 2010) might be called a gallery, although Word itself does not use the word *gallery* to refer to every feature set. Some, such as the list of bullets, are called *libraries* instead.

Galleries include document styles, themes, headers, footers, page colors, tables, WordArt, equations, symbols, and more. The style gallery is shown in the previous section, in Figure 1-11. Galleries often work hand in hand with the live preview feature. Imagine that you're paging through a coffee-table volume of paintings, and each time you point to a different painting, your own house and garden are transformed to reflect the style and period of the painting. Point at a different painting, and your house and garden are retransformed.

As noted earlier, however, not every gallery results in a live preview. As you begin to take advantage of this feature, you will quickly start to miss it when it's not available. Word 2010 has added some new galleries that Word 2007 did not have, such as the Artistic Effects gallery in the Picture Tools Format ribbon.

The MiniBar or Mini Toolbar

Another feature in Word 2010 is the *MiniBar*, more formally known as the *Mini Toolbar*. The MiniBar is a set of formatting tools that appears when you first select text. It is not context-sensitive, and always contains an identical set of formatting tools. There is no MiniBar for graphics and other non-text objects.

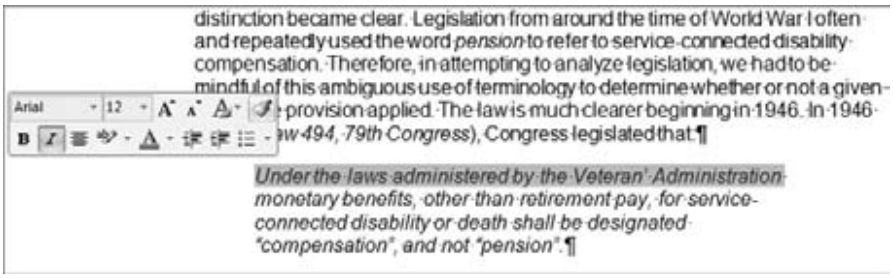
When you first select text, the MiniBar appears as a ghostly apparition. When you move the mouse pointer closer to it, it becomes more solid, as shown in Figure 1-13. If you move the mouse pointer far enough away from it, it fades away completely.

Note

Once the MiniBar disappears, you cannot resurrect it by hovering the mouse over the selection. You can, however, display the MiniBar and the current context-sensitive pop-up menu by right-clicking the selection. Note also that only the mouse triggers the MiniBar. If you display the pop-up context menu by pressing Shift+F10 or by tapping the Menu button on a Windows keyboard, the MiniBar will not appear. ■

FIGURE 1-13

The MiniBar appears when text is first selected.



Some users will love the MiniBar, others will hate it. I recommend that you give it a try. It exists to provide convenient and discoverable access to commands that are otherwise less convenient and less accessible, unless you are an avid keyboarder.

When the Home ribbon is exposed, the MiniBar might seem superfluous, as all of the MiniBar's components are replicated in that ribbon. However, consider for a moment how far the mouse has to travel to access those formatting commands. With the MiniBar, the mouse pointer usually has to travel less than an inch or so. For those with repetitive motion injuries, this can save a lot of wear and tear on the wrist.

If you decide that the MiniBar gets in the way, you can turn it off. Even when it is turned off, however, you can still summon it by right-clicking the current selection. To learn how to turn it off, see Chapter 6.

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Note

Unlike many ribbon tools, the MiniBar tools do not produce live previews of formatting and other effects. If you need to see a live preview, use the ribbon instead. ■

Context Menus

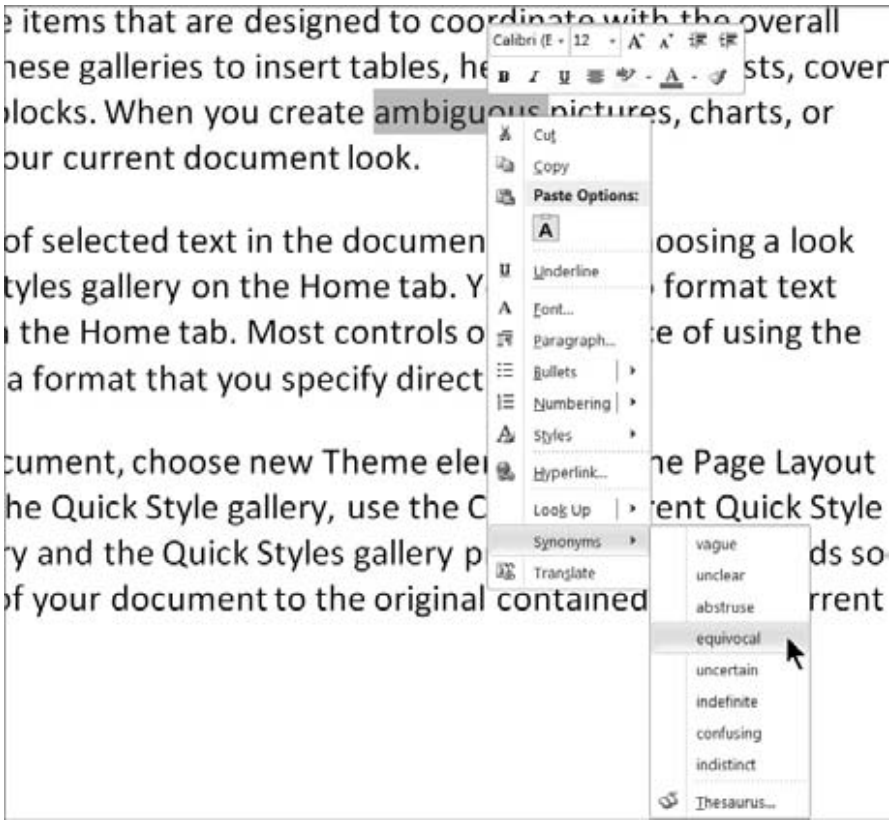
While the menu system of Word 2003 and earlier has been almost entirely replaced by ribbons, Word's context menus, often called pop-up menus, remain. Shown in Figure 1-14, context menus remain largely unchanged from Word 2003, except for the fact that when text is selected, the MiniBar accompanies the pop-up.

Note

While context menus remain in Word 2010, the ability to customize them is gone. ■

FIGURE 1-14

When you right-click a selection, a context-sensitive pop-up menu appears, along with the MiniBar.



Super Tooltips

Another Word 2010 feature is *super tooltips*. The very name makes you want to leap over tall buildings! Super tooltips are expanded feature descriptions designed to make features more discoverable, as well as to reduce the frequency with which you'll need to press the F1 key for Help. (As it turns out, this is a blessing, because Word's Help system isn't exactly what the doctor ordered. I'll have more to say about that later.)

Shown in Figure 1-15, a super tooltip magically appears when you hover the mouse pointer over a tool. If you hover the mouse pointer over an exposed gallery item (such as a style), however, you will see a live preview of the gallery item instead of a super tooltip. Even better!

FIGURE 1-15

Super tooltips explain the selected feature, reducing the need to press F1.



Dialog Boxes and Launchers

Even though Office 2010's philosophy focuses on the results-oriented ribbon, some features and functions remain tied to traditional dialog boxes. Dialog boxes can be launched in several ways, including by direct keystrokes and what Microsoft calls *launchers*. Launchers are the arrows pointing southeast in the lower right corner of some ribbon groups, as shown in Figure 1-16.

In many instances, Word's dialog boxes have not been overhauled or greatly enhanced for this release. However, if you look closely, you often will see a number of changes, some subtle and others not so subtle. Figure 1-17 contrasts the Font dialog boxes from Word 2010 and Word 2007. Sometimes, if you look really closely, new features will leap out at you!

Task Panes

Word 2003 sported a collection of 14 task panes (or more, depending on what features were installed and in use). You activated the task pane by pressing Ctrl+F1, and it included Getting Started, Styles and Formatting, Clipboard, Mail Merge, and others. As noted earlier in this chapter, in Word 2010, Ctrl+F1 toggles the ribbon on and off.

FIGURE 1-16

Clicking a launcher displays a dialog box.

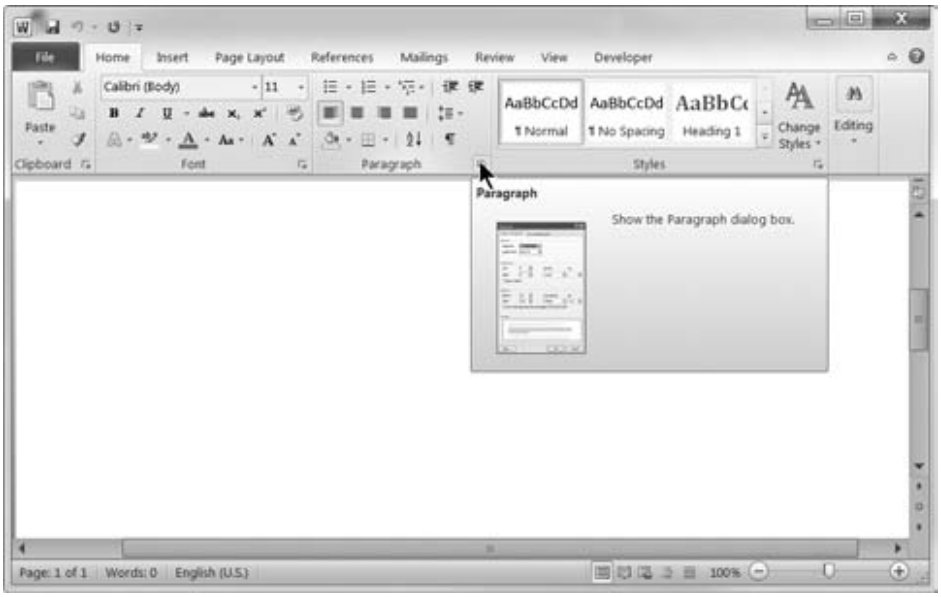
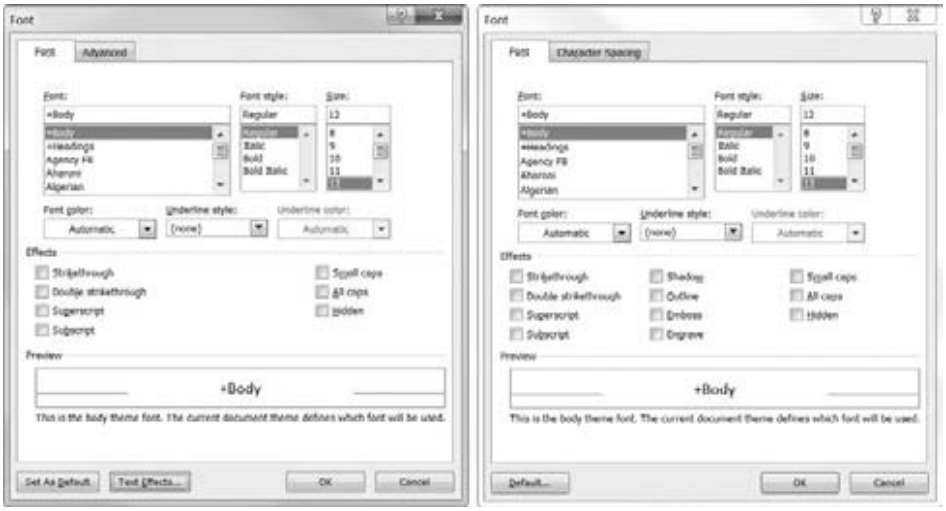


FIGURE 1-17

Can you spot the differences between the Word 2010 and Word 2007 dialog boxes? Without seeing the two versions side by side, you might never notice Word 2010's new Text Effects button!



Word 2010 Font Dialog

Word 2007 Font Dialog

If Ctrl+F1 is now used for something else, how do you activate the task panes in Word 2010? The short answer is that task panes, as a cohesive concept, have been mostly abandoned. Word 2010 still has some task panes, but you can't access them using a drop-down menu as you could in Word 2003, and you can't access the entire collection of task panes using a single keystroke. Instead, they will appear as needed (and possibly when you aren't expecting them). Think of them as dialog boxes that enable you to type while they're onscreen.

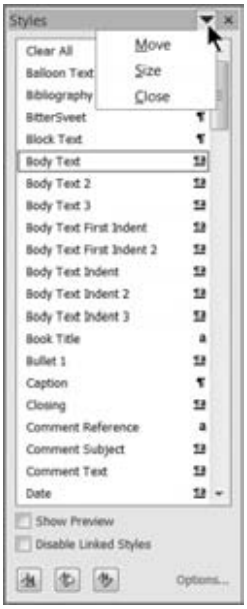
In the Home ribbon, click the Styles dialog launcher. This displays the Styles task pane. Now click the drop-down arrow to the left of the X in the upper right corner of the task pane, as shown in Figure 1-18. Instead of a list of task panes, you get three options that control only this task pane. Task panes can be docked on the left or right side of the document window, or can be dragged and displayed wherever it's convenient — including completely out of Word's window frame. Just move the mouse pointer over the Styles title bar and drag. To return it, just drag it back, or double-click the floating task pane's title bar.

Note

Is there something missing from the Styles task pane? In Word 2003, the Styles and Formatting task pane always shows the style of the current selection. That doesn't always happen in Word 2010, because the Style gallery is limited in the number of styles it can display and it doesn't automatically scroll to the currently selected style. If this is a problem for you, there is a partial solution. See Chapter 9 for the details. ■

FIGURE 1-18

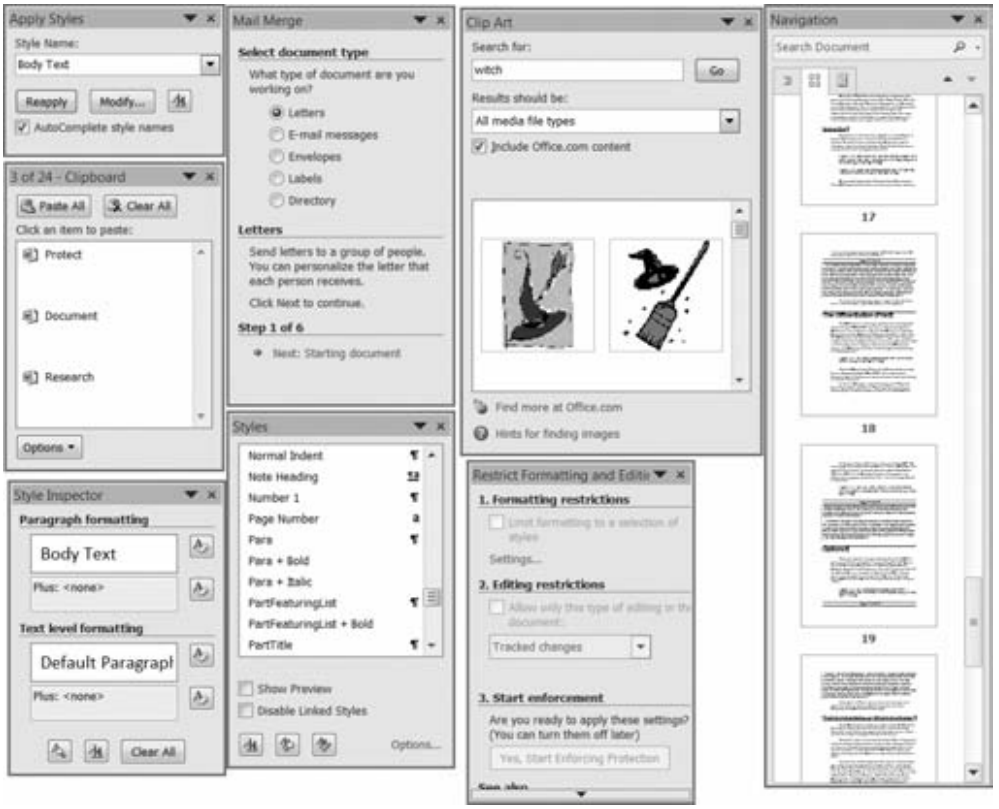
Word 2010's task panes are independent of each other and can't be selected from a common pull-down control.



Other Word 2010 features that manifest as independent task panes include the Navigation pane (new in Word 2010), the Mail Merge Wizard, Clip Art, Protect Document, Research, Document Management, the Clipboard, and the Style Inspector. While it might seem a bit odd for Microsoft to have unbundled the task panes, a quick look at Figure 1-19 hints at a decided advantage of the independent approach. While you probably won't need to have them all onscreen at once, it's nice to know that you're not limited to just one task pane at a time.

FIGURE 1-19

You can display multiple task panes at the same time, should you feel a compelling need for clutter.



Status Bar

Now we turn to the status bar, neglected until now. Shown in Figure 1-20 , the status bar is the bar at the bottom of the Word window. The status bar provides more than 20 optional pieces of information about the current document. Right-click the status bar to display its configuration options.

FIGURE 1-20

Word 2010's status bar adds several new collaboration features.



Do you need to keep track of the word count? Not only does Word update the Word count continuously, but if you select text, it tells you how many words are selected: 180/5,644 means that 180 words are selected out of a total of 5,644.

Note

The status bar configuration menu stays onscreen until you click somewhere else in the Word window. That means that you can enable or disable as many options as you want without having to repeatedly right-click the status bar. Notice also that the configuration menu displays the current status too, so if you just want to quickly refer to it to find out what language you're using — but don't really want Language on the status bar — you don't have to put it on the status bar and then remove it. Note additionally that the status items aren't just pretty pictures. For example, clicking the Page item takes you to the Go To Page dialog box. Clicking the Macro Recording item opens the Record Macro dialog box. ■

To dismiss the configuration menu, simply click the status bar or in the document, or press escape, enter, or the spacebar.

Go Backstage with File

Office 2007's Office button has been replaced by a File tab in Office 2010, which displays the *Backstage* view. Only it's not really a tab because it doesn't act like other tabs. More on this in a while. Either way, it will make a lot of users happy. The File button, which has been clicked in Figure 1-21, displays the Backstage view. Here you'll find a number of top-level commands that you ordinarily expect to find in a File menu.

FIGURE 1-21

Word 2010's File tab replaces Word 2007's Office button.



In Word's File tab, some of the commands — Info, Recent, New, Print, Share, and Help — have additional screens and commands.

As shown in Figure 1-22, it pays to explore in Word 2010. By clicking each of the expandable commands in Word's File tab or Backstage view, the seasoned Word user will quickly discover a number of features hiding in each panel — recent files, document templates, printer commands, save and send options, and more. You'll also find legacy features hiding there. Users coming from

Word 2007 will be happy to know that you no longer need to download an add-in to gain PDF and XPS capabilities. Those are available in Word 2010 right out-of-the-box.

Caution

To exit Backstage, don't click the X. Instead, press escape, or click a different tab (such as the Home tab). If you click the X in the upper right corner, Word not only closes Backstage, but closes itself too. ■

FIGURE 1-22

A cornucopia of online options is found in the Save & Send tab.



Options

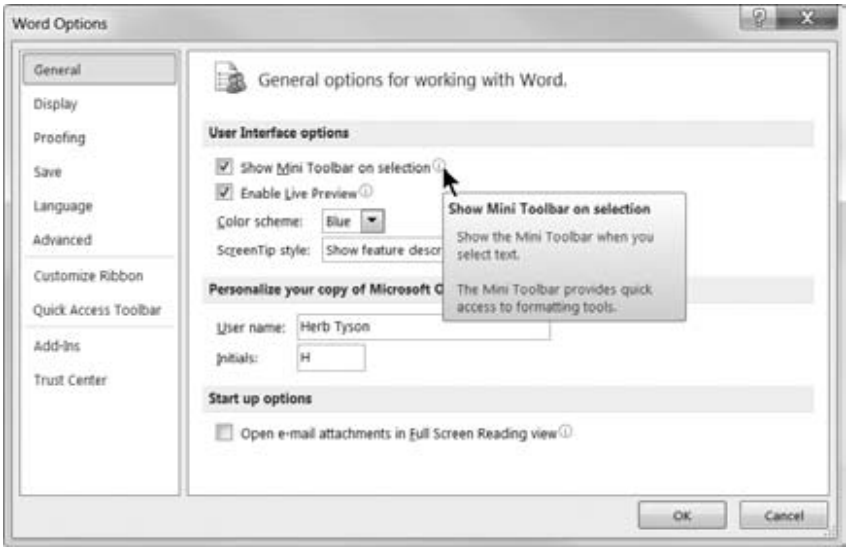
When you wanted to change something about Word 2003 or earlier, you had multiple places to look, including Tools ➪ Options, Tools ➪ Customize, Help ➪ About ➪ Disabled Items, Help ➪ Check for Updates, File ➪ Permission, Tools ➪ Protect, and Tools ➪ AutoCorrect Options, to name but a few. In Word 2010, "change central" is now one place: Options. To get there, choose File ➪ Options to display the view shown in Figure 1-23.

Note

Figure 1-23 is a bit fraudulent, I have to admit. In order not to waste a lot of space, I've neatly resized it so it's no longer larger than the state of Rhode Island. That you can resize it is the good news. The bad news is that Word refuses to remember that you resized it, and the next time you open it it's back just as big as ever. In fact, in some dual-monitor configurations, it's possible that Options won't obey Windows' normal rules, and Options will span both monitors each and every time you open it. ■

FIGURE 1-23

The Options dialog box features Information icons to clarify selected options.



Although all of Word's options are now in one place, so to speak, that doesn't necessarily make them any easier to find. Navigating Word Options can be daunting.

Truth in Advertising, or What's in a Name?

Word's Options dialog has ten sections, or tabs, on the left. Do not be fooled by the labels. Note that one of the tabs is called Advanced. Microsoft's idea of *advanced* might not be the same as yours. What's optional for someone else might be essential for you.

Microsoft's logic is to try to put at the top of the list the controls and options it thinks you are most likely to want to change. The first set, General, is therefore the group it thinks will matter most to the typical user. If you're reading the Word 2010 Bible, however, you might not be a typical user. Keep this in mind as you look at the ten tabs.

Another caveat is that the labels aren't even objectively accurate. For example, there is a tab labeled Display. If you don't find the display option you're looking for there, don't give up. Some display options actually reside in General, such as Show Mini Toolbar on Selection, Enable Live Preview, and Open e-mail attachments in Full Screen Reading View.

A number of display options are also sheltered under the Advanced umbrella, including great favorites such as the Show Document Content options, the Display options (duh!) and Provide Feedback with Animation (under General). If you're keeping track, there's a General tab, and there's a General section within the Advanced tab. Which General are we supposed to salute?

Still other display options are to be found hiding in various other dark corners and recesses. If you can't find something you *know* must be there, check the index in this book.

Options are covered in detail in Chapter 48. I urge you to click each of the ten tabs to explore the different options that are available. Mostly, this is so you can learn the answer to "Where did they hide it?" Additionally, however, it will enable you to learn about options and features you might not otherwise be aware of.

Advanced . . . versus Not Advanced?

If you're at all like me, you might be wondering "How did Microsoft decide what's advanced and what's not advanced?" We'll probably never know. More important than understanding the logic is simply becoming familiar with the lay of the land so you know where things are, rather than having to look all over the place each time you want to know how to change a setting.

The Advanced tab, partially shown in Figure 1-24, has twelve major sections (depending on how you count them, of course). Also depending on how you count, the Advanced tab offers more than 150 different settings, including the Layout Options.

Remember those nice information icons so prevalent in the General tab? The Advanced tab has only six of them! Out of more than 150 different settings, there are information icons for only six!

Scroll down a bit so you can see both the Save and Preserve Fidelity sections at the same time. Is there any doubt in your mind what "Prompt before saving Normal template" means? Not in mine either.

Now look at "Embed linguistic data." Do you really know exactly what that means? I didn't (I looked it up, so I know now, but there's no cute information button to tell you). Why, do you suppose, did Microsoft choose to provide cute little information buttons for the options whose meanings, for the most part, are already patently obvious? Clearly, it must not know what "Embed linguistic data" means either!

To find out what these advanced options are, simply select the option and press F1. Not much help, right? Okay, then, type "embed linguistic data" into the Search box and click Search for the really "helpful" view shown in Figure 1-25.

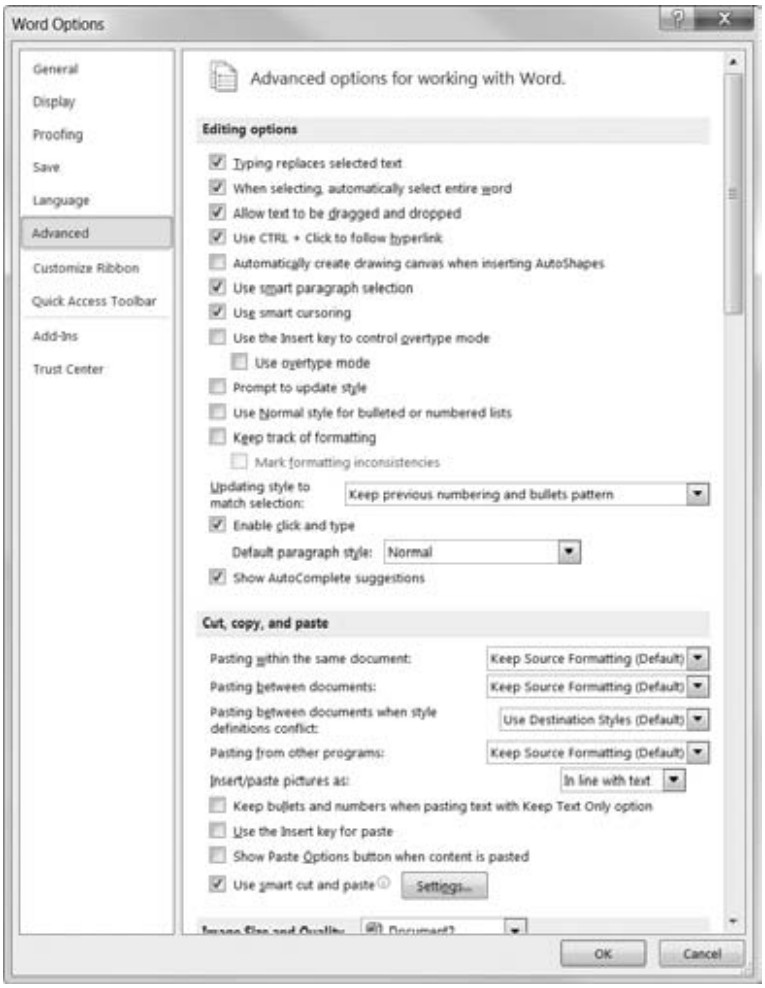
www.allitebooks.com

Tip

In many instances, but not always, you can find help on what you want by typing the exact feature name (e.g., "embed linguistic data") into the Search box, pressing enter (which usually returns no results), and then clicking the Support Knowledge Base link. Word Help itself, however, is clueless. ■

FIGURE 1-24

Word's Advanced options contain over 150 settings.



Clearly, Help needs help. Sadly, when I updated the Bible for Word 2010, I didn't need to change this section very much. You will find useful help much more quickly by following the

previous tip, or simply by Googling the feature in question. Note that even when you can find help in Microsoft's Knowledge Base, that help often is couched in Microsoftese, a clever circular kind of writing that repeatedly uses the mystery feature's name in lieu of actually telling you what the feature does or means. Searching other sources online often nets you more useful information because the very existence of such sources likely is the result of someone's frustration in trying to parse the "official" sources.

FIGURE 1-25

Word's Help system leaves a lot to be desired.



Summary

In this chapter you've had a look at many of the exciting facets of Word 2010. You've seen the philosophy behind the ribbon (discoverability). You've also learned a number of ways in which Word 2010 is similar to earlier versions, and a number of ways in which it's different. You should now know what people are talking about when they mention the following:

- Ribbon tabs
- The Quick Access Toolbar (QAT)
- Live preview
- Super tooltips
- Galleries

CHAPTER 2

Quick Start

Regardless of your background with prior versions of Word, this chapter will help you get started quickly. If you're new to Word, this chapter escorts you through the basics, so you're ready to begin your journey toward becoming an expert. If you've been using Word for years, there are some new wrinkles that I'll point out along the way. This chapter also explores startup methods, navigation nuances, view variations, and saving options. The final section will have you writing and printing a letter and envelope in 15 minutes or less. If you've never used Word before, you might want to jump ahead to "Just Dive In," and then come back to "Starting Word."

IN THIS CHAPTER

Starting Word

Navigation tricks and tips

Views

Saving

Just dive in

Starting Word

Mercifully, some aspects of Word seldom change, and the way in which you start Word is one of them. This book assumes that you're using Windows 7 in its default configuration, although for many readers that may be a bad assumption. I trust, however, that if you know enough about how to make Windows 7 look and act like Windows Vista or XP, you'll be able to translate what is said into the steps that apply in your situation.

Start Menu

One of the more common ways of starting Word — but not necessarily the most common — is through the Start menu. To do this, you choose Start ➪ Programs or All Programs ➪ Microsoft Office ➪ Microsoft Word 2010. Perhaps easier for Vista and Windows 7, you can choose Start, and then type **word** into the search box. When Microsoft Word 2010 is highlighted under Programs in the results list, press Enter.

Note

If you installed Word 2010 and chose to leave any earlier versions of Word on your computer, you will need to be mindful of which version you are starting. When Word 2010 is installed after earlier versions, the most recently installed version of Word now assumes "ownership" of the .doc, .docx, .docm, and similar file types, as well as other file types previously associated with the earlier versions of Word. ■

Alternatively, if you've recently been working on a Word document, you can start Word by right-clicking Word in the taskbar, and clicking the desired document name in Windows 7's "jump list" (assuming it is still listed).

Desktop

Word can also be started from a Windows shortcut placed on the desktop. The easiest but least flexible way to do this is to copy an existing shortcut from the Microsoft Office folder created during Office's/Word's installation. To do this, choose Start ➪ Programs or All Programs ➪ Microsoft Office. Right-click the icon for Microsoft Word 2010 and choose Send To ➪ Desktop (create shortcut). Click the desktop icon on the Windows taskbar to display the Windows desktop, and locate the Microsoft Word 2010 shortcut.

Tip

To quickly move to a particular shortcut on the desktop, display the desktop, click anywhere on it, and tap the first character of the shortcut's name. Repeatedly tapping that key cycles among all shortcuts that begin with that character. In this case, it would be *M*.
Do you have a dozen or more shortcuts on your desktop that all begin with the word Microsoft? This negates the utility of the tip, right? Well, there's no reason all Microsoft shortcut names have to start with the same letter. Rename them. For example, rename Microsoft Word 2010 to just Word 2010 (or just Word, if that's the only version installed). Word! ■

To do this, select the shortcut and press the F2 key. Replace the highlighted text with just **Word** or **Word 2010** (or **Word 14**), and then press enter to exit the editing mode. Now when you click on the desktop and tap the W key, it will likely take many fewer taps to find Word than when it was just one of a dozen or more items that began with the letter *M*. Do this for Excel, PowerPoint, Outlook, and so on as well.

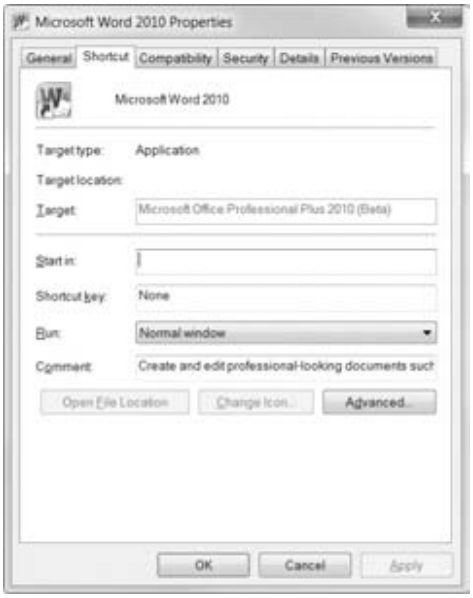
Creating a Full-Function Word Shortcut

The previous section mentioned that using the shortcut created during Office/Word installation was the easiest but least flexible method for opening word. It lacks flexibility because of the nature of the special shortcuts created by the Office installation program. Find the Word 2010 shortcut you created or copied on the desktop, right-click it, and choose Properties. In the Shortcut tab (see Figure 2-1), you'll see that the Find Target and Change Icon controls are grayed out. If you want to modify the target to add a command-line switch (see "Command-Line Switches" later in this chapter), this shortcut won't work. Similarly, if you want to differentiate between Word shortcuts by assigning different icons, this shortcut won't work.

While this shortcut is fine for starting Word or even assigning a shortcut key, it is not sufficiently flexible for some needs. To create a more functional shortcut you'd need to find the actual program (`winword.exe`) that's used to start Word 2010. Press esc to close the Properties box.

FIGURE 2-1

Shortcuts created by Office's installation program have Target fields and icons that cannot be modified by the user.



While locations vary (depending on user and network settings, for example), the usual default location for Word 2010 is `C:\Program Files\Microsoft Office\Office14\winword.exe`.

Open Windows Explorer and navigate to `winword.exe`. When you find it, right-click it and choose Send To ➪ Desktop (create shortcut). On the desktop, locate `WINWORD.EXE - Shortcut`, right-click it, and choose Properties. As shown in Figure 2-2, the Target field is no longer grayed out, and the Change Icon button is now available, which enables you to customize the target specification as well as choose a new icon for this shortcut.

With the flexible shortcut you can now add command-line switches to the target as well as choose your own icon. When and if needed, the Compatibility tab is now also available. You probably want to change the shortcut's name while you're at it.

Shortcut Key

Once you've identified a Windows shortcut you can use to open Word, you can also assign a shortcut key to it. To assign a shortcut key, click the Shortcut key field (shown in Figure 2-2) and press the key combination you want to use. I find that Ctrl+Alt+Shift combinations seldom are used by other programs, and therefore usually are available. Personally, I use Ctrl+Alt+Shift+W for Word, Ctrl+Alt+Shift+E for Excel, and Ctrl+Alt+Shift+P for PowerPoint. (I keep Outlook open all the time, so it doesn't need a combination.)

FIGURE 2-2

User-created shortcuts have targets and icons that are accessible.



Pinning to Taskbar

Another startup option — one I highly recommend — is to place a shortcut onto Windows' taskbar. Always visible and highly flexible, the taskbar is a vast ergonomic improvement over the rarely visible desktop (rarely visible at least on my computer) as well as over various Start menu approaches. If you need to modify a shortcut that's pinned to the taskbar, it's a two-step process. Right-click the shortcut to display the jump list. Just above the Unpin option, right-click Word 2010, and choose Properties.

Caution

Attention Vista users: if you want to also be able to assign a keystroke to the shortcut, make sure you assign it to a shortcut that's on the desktop and not one that's already on the Quick Launch. Because of a bug in Windows Vista, shortcut keystrokes assigned to Quick Launch shortcuts usually don't work. When assigned to a desktop shortcut and later moved to the Quick Launch, they work fine. This is not an issue in Windows 7 (unless you've chosen to resurrect Quick Launch, in which case you're on your own). ■

Windows Explorer

Yet another way to start Word is by double-clicking a Word-associated document displayed in Windows Explorer. Simply open Windows Explorer, navigate to the desired document, and double-click it. Alternatively, you can select it and press Enter, or right-click it and choose Open.

Tip

In fact, you can open multiple Word files this way — at the same time. Select the first one you want to open, and then Ctrl+click on each additional file you want to open. Then press Enter. This also works in Word's own Open dialog box. ■

Browser

Usually you can also open Word by clicking a Word document link that's displayed in a browser window. Simply click the link. Unfortunately, there are a couple of reasons that this is a bad idea. For starters, you often don't know how large the file is or how fast the server is. Uninformed clicking sometimes ties up not only your browser but Word as well, resulting in a possibly misleading "Word is not responding" error message. Even more importantly, however, unless you yourself put the file onto the server, you can't be sure it doesn't contain a virus.

A better approach almost always is to right-click the document link in question, choose Save Target As (or your browser's equivalent), and save the file to a local folder. While most popular antivirus programs monitor files you open from links, I'm not positive this is true of all of them, and I am positive that not all macro viruses have been discovered and incorporated in all antivirus programs. Better safe than sorry. After the file is on your hard drive, you can scan it with your antivirus program before proceeding.

Tip

Any time you open a Word file of uncertain origin, hold down the shift key as you open the file. This prevents any automatic macros from running. Inspect it for suspicious macros, and once you're sure it's safe, proceed — but cautiously. In theory, this is less necessary in Word 2010 than in previous versions of Word, however. When Word detects that a file has come from an outside source (Internet, e-mail attachment, etc.), it can open it in Protected View. At this writing, however, Protected View does not always work, so my best advice still is to use the shift key trick when opening foreign files. ■

Another reason to explicitly save the file is that it can be put somewhere other than in your temporary Internet files. That way, if you need it again later, you won't have to download it again.

Windows Search Box

Another way to start Word from the Start menu is by using Windows' Search programs and files box. This provides an easy way (easier than creating a new shortcut, for example) to run Word using command-line switches (discussed later in this chapter). Click the Start button and type **word** (or **winword** if you need additional parameters or switches) into the Search programs and files textbox, as shown in Figure 2-3. If you need to run Word once with a special one-time command-line switch (coming up next), this is one way to do it. If you'll need that particular command-line switch more often, then you'd be better off creating a Windows shortcut and tucking it away in a memorable location for future use.

FIGURE 2-3

Choose Start ➪ Run to start Word using a command-line switch.



Note

Under some circumstances, you might need to type the full path for Word into the Open box. The usual location is `C:\Program Files\Microsoft Office\Office14`, but it can be different depending on whether you're running the 64-bit versions of Windows and/or Office. ■

Safe Mode

Any time you start Word, you have the option of starting it in safe mode. You might want to do this for a variety of reasons, including the following:

- Word experienced problems and you're trying to diagnose them.
- You need to observe Word's default behavior to help someone else.
- You need to suppress a Word add-in, for whatever reason.
- You're curious about something (my own personal favorite).

To start Word in safe mode, simply press the control key (either left or right) when you start Word, and continue holding it until the dialog box shown in Figure 2-4 appears. Click Yes to continue starting in safe mode.

FIGURE 2-4

Hold down the control key to start Word in safe mode.



When you start in safe mode, a number of Word options and Windows registry settings are suppressed. Word add-ins are also not loaded, and user settings stored in `Normal.dotm` are not loaded either. The idea is to prevent user and other customizations from interfering with

Word's default behavior. This can be useful in a variety of circumstances, from diagnosing problems to writing books and articles about Word in which you don't want to confuse your own customizations with Word's normal built-in defaults.

Note

Starting Word in safe mode is not the same as starting Word using the `/a` command-line switch. More on this later in this chapter. ■

Command-Line Switches

Command-line switches can be used to change the way Word opens, as well as to perform certain tasks. Depending on the permanency of the need for a given command-line setup, either Windows' Search box, shown in the previous section, or a full-function Word shortcut should be used.

You can, of course, open a command prompt window and navigate DOS style, but for most users that's a bit too tedious.

Note that all command-line switches require a space after the trailing quote that follows the file specification for the Word executable file, and before the backslash (\), e.g., `winword.exe"[space]/a`. There is no space, however, between the `/` and the character that follows it. Note also that when a file path specification or filename itself contains a space, the entire name must be enclosed in quotes.

Tip

Sometimes getting the command-line specifications right involves a fair amount of trial and error. To save time and effort, create a full-function Windows shortcut for starting Word. Open the Properties dialog box and make your change(s) to the Target field. Then, rather than close the Properties dialog box, click Apply. The dialog box remains open and the shortcut reflects the changes. If whatever you did didn't work, go back to the Properties dialog box and try something else. Keep it open until you find something that works the way you want it to. ■

/a

The `/a` switch prevents Word from automatically loading global templates (including your version of `normal.dotm`) and add-ins. It also prevents Word from loading some of the settings in Word's Data key in the registry. The `/a` switch often is used as a diagnostic tool for isolating problems with Word. Hence, if adding the `/a` switch "solves" whatever problem you're having, then the problem is located in a global template or an add-in.

Note

Unlike Word 2003, the `/a` switch in Word 2010 does not suppress changes to the QAT. It also doesn't prevent the display of files in the Recent Documents list when you click the File button. ■

Using the /a switch is not as drastic or complete as starting Word in safe mode, because add-ins and global templates can still be loaded manually when you use the /a switch. An interesting quirk about the /a switch is that sometimes running Word just once with it is enough to fix certain registry corruption problems. In contrast, starting Word in safe mode does not modify the registry.

/laddinname

This switch starts Word and immediately loads a specific Word add-in — for example, /l"c:\program files\stat\statpax.dll".

/m

This switch prevents Word from running any AutoExec macros. This sometimes is used in troubleshooting as well as to prevent damage to documents from unexpected AutoExec macros.

/mcommandname

This switch starts Word and immediately runs the indicated command or macro name. For example, /mfile1 starts Word and immediately runs the File1 command, which tells Word to open the first file listed in the Recently Used Files list.

/n

This starts Word without opening a new blank document.

/pxslt

This switch starts Word and creates a new XML document based on the indicated XLT (extensible stylesheet language transformation) — for example, /p"c:\XML\formatted.xsl".

/q

The /q ("quiet") switch suppresses the display of the Word 2010 splash screen when Word starts. This also results in Word's starting faster.

/r

The /r switch forces Word to rewrite the registry entries. This often is used to fix problems with corrupted registry entries. Only the registry entries are changed, and Word does not open.

/safe

This switch starts Word in safe mode. This is the same as starting Word while holding down the control key and then clicking Yes. The full specifications of what safe mode does in Word 2007

and 2010 are not available at this writing. They will be similar to those for Word 2003, however, which are available at `http://support.microsoft.com/kb/827706`.

/ttemplatename

This switch starts Word and creates a new document based on the indicated template — for example, `/tBrochure.dot` or `/t"C:\Program Files\Microsoft Office XP\Templates\1033\Brochure.dot"`.

/u

Watch out for this switch on April 1. It has no therapeutic value whatsoever, and merely prevents Word from loading. Why does it exist? Nobody seems to know. If you're a system administrator, one supposes you could temporarily disable users' ability to run Word using this switch. However, that's pure speculation as to why Microsoft created this switch in the first place.

/w

This switch starts a new instance of Word with a new blank Document# window. The new document will not appear as an option in the View ➪ Switch Windows list of other open instances of Word.

path\filename

Specifying a path and filename causes Word to open that file. If the path is missing, the file must be located in Word's default document folder. For example, to create a shortcut for Word to open a document named `C:\Users\Herb\Documents\Resources.docx`, I might use the following target specification: `"C:\Program Files\Microsoft Office\OFFICE12\WINWORD.EXE" "C:\Users\Herb\Documents\Resource.docx"`.

Note that both the program specification and the full path and name of the file are inside quotes.

File or Backstage View

One of the tasks most frequently performed in Microsoft Word is that of opening files. You'll be happy to know that if you reflexively press Alt+F in Word 2010, the File or Backstage view opens. And, in Word 2010, it might properly be called the File menu (unlike in Word 2007), although the current vernacular wants to call it the Backstage view. In time, we'll see whether this catches on. I think it's unlikely, since "Backstage" isn't mentioned in what you see in Word's interface.

While Alt-F and the File tab both get you there, they do *not* have identical results. With no document onscreen, if you click the File button, you'll get something like what is shown in Figure 2-5 in the following section. If you press Alt+F, you'll get the slightly different view shown in Figure 2-6 (also in the following section), which displays the associated hot keys. Note

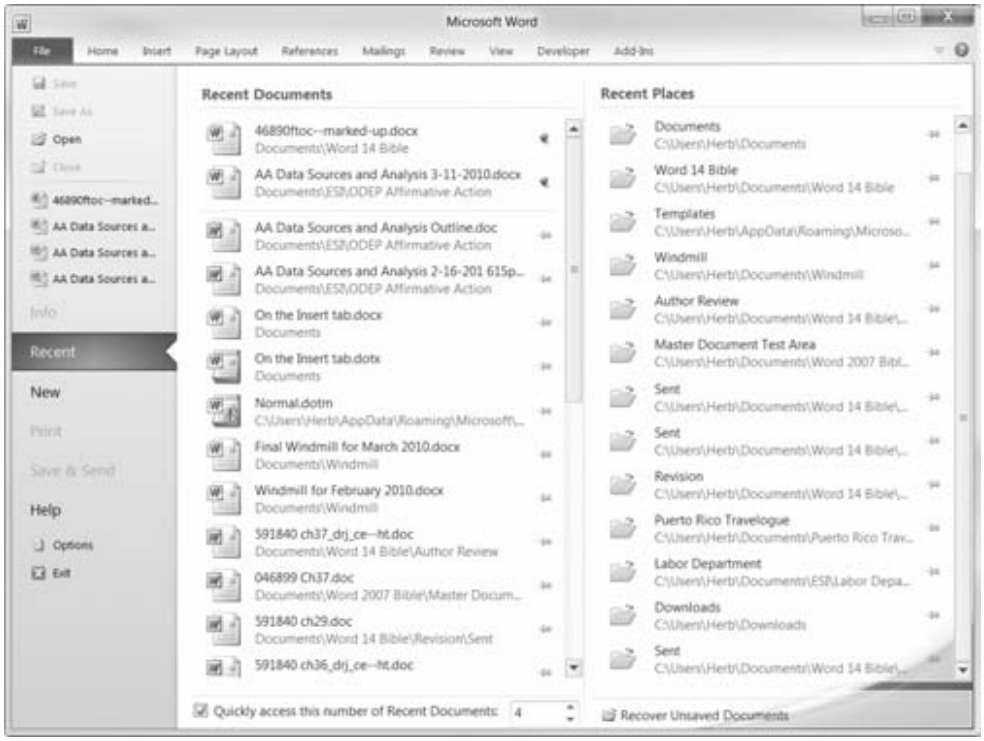
that the hot keys work regardless of whether the reminders you see in Figure 2-6 are displayed, so you don't need to press Alt+F to get subsequent hot key functionality. (Above, I said "With no document onscreen" because if a document is open, Backstage opens to the Info tab instead of Recent Documents. It's context-sensitive.)

Have You Been Pinned?

When you open Backstage view, notice the pushpins to the right of the top recent documents, shown in Figure 2-5. When you click a pushpin, this tells Word not to let that file or folder cycle off of the Recent Documents or Recent Places list. It can cycle to the bottom (if all files have pushpins engaged), but as long as the pushpin is blue (pushed) and the number of pinned files in the list doesn't exceed the maximum specified, the files won't cycle off the list.

FIGURE 2-5

Pushpins are used to prevent files from being removed from the Recent Documents list.



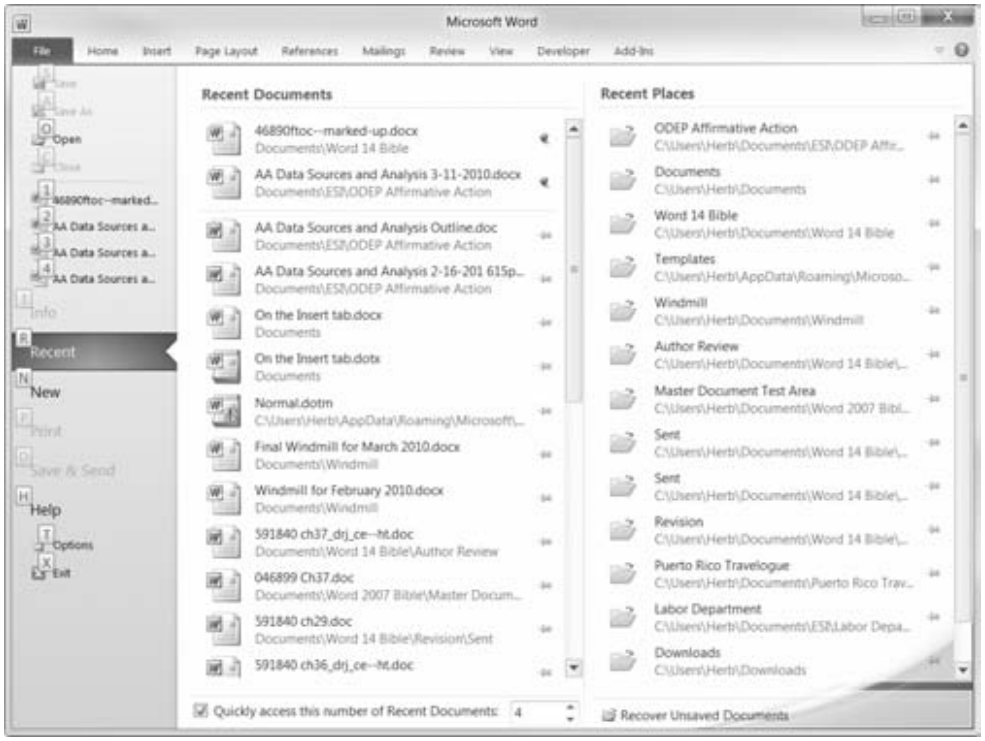
In Figure 2-6, the first two files' pushpins have been pushed. Not shown here is that the maximum number of recent files to display is set at 20 (Options ➪ Advanced tab ➪ Display section). As new files are opened, the ones that are pinned will remain at the top of the list.

To clear the list of recent documents, set the maximum number of files to 0. If you subsequently reset it to a higher number, the list remains empty until you start to open files again. If, however,

you were to reset the maximum recent files to a lower nonzero number and then reset it to a higher number, the files previously displayed would reappear. So lowering the max is not a way to scrub files from the list, while setting the max to 0 is.

FIGURE 2-6

When you open the Office dialog box using Alt+F, its access keys are displayed.



Notice also the Quickly access this number of Recent Documents option at the bottom of Figure 2-6. If checked, this adds that number of files selected to the leftmost part of the Backstage view — between Close and Info.

Navigation Tips and Tricks

Bible readers already know the basics of using the Windows interface, so this book skips the stuff that I think every Windows user already knows about, and instead covers aspects of Word you might not know about. In our great hurry to get things done, ironically, we often overlook simple tricks and tips that might otherwise make our computing lives easier and less hurried or, at the very least, more entertaining.

Tricks with Clicks

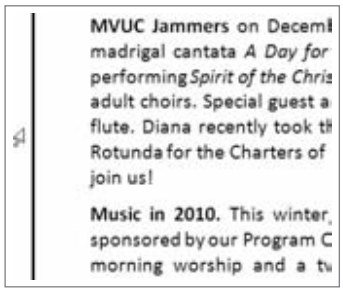
We all know about double-clicking, but not everyone knows the benefits of triple-clicking, Ctrl+clicking, and Alt+clicking.

Triple-Clicking

When you triple-click inside a paragraph, Word selects the entire paragraph. However, *where* you click makes a difference. If you triple-click in the left margin, rather than in a paragraph, and the mouse pointer's shape is the arrow shown in Figure 2-7, the entire document is selected.

FIGURE 2-7

A right-facing mouse pointer in the left margin indicates a different selection mode.



Is triple-clicking in the left margin faster and easier than pressing Ctrl+A? Not necessarily, but it might be if your hand is already on the mouse. In addition, if you want the MiniBar to appear, the mouse method will summon it, whereas Ctrl+A won't.

Ctrl+Clicking

Want something faster than triple-clicking? If you just happen to have one hand on the mouse and another on the keyboard, Ctrl+click in the left margin. That also selects the entire document, and displays the MiniBar.

If you Ctrl+click in a paragraph, the current sentence is selected. This can be handy when you want to move, delete, or highlight a sentence. As someone who sometimes highlights as I read, I also find that this can help me focus on a particular passage when I am simply reading rather than editing.

Alt+Clicking

If you Alt+click a word or a selected passage, that looks up the word or selection using Office's Research pane. Do you ever accidentally invoke the Research pane? Want a good way to turn it off? Well . . . stop looking, because it doesn't exist.

Note

If you're an advanced Word user, you probably don't want to accept this. You're probably thinking "Herb doesn't know that you can intercept the built-in Research command and replace it with a dummy macro, thereby disabling this behavior." Well, you caught me. Go ahead and try it. I'll wait.

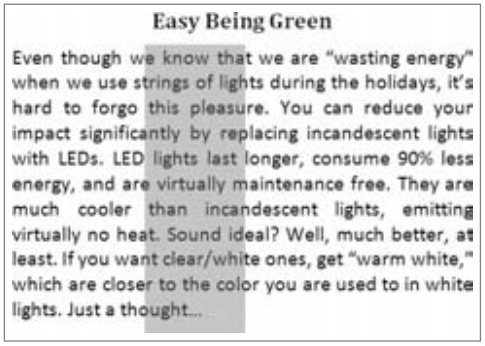
Back already? That's right. You can indeed prevent the Research command on the Review ribbon from doing anything, but that doesn't tame the Alt+click shortcut. It's more persistent than a horsefly. ■

Alt+Dragging

You can use Alt+drag to select a vertical column of text — even if the text is not column-oriented. This can be useful when you are working with monospaced fonts and there is a de facto columnar setup. Once a selection is made, any character- or font-oriented formatting can be applied to it, as shown in Figure 2-8. The selection can also be deleted. Note that if the text is proportionally spaced, anything that affects the size and therefore the ostensible columnar orientation will undo the selection. The effect can be rather bizarre.

FIGURE 2-8

With the alt key pressed, you can drag to select a vertical swath of text.



Shift+Click

Click where you want a selection to start, and then Shift+click where you want it to end. You can continue Shift+clicking to expand or reduce the selection. This technique can be really useful if you have difficulty dragging to highlight exactly the selection you want.

Multi-Selecting

A few versions of Word ago, it became possible to make multiple noncontiguous selections in a document. While many know this, many more don't. To do it, make your first selection. Then, hold down the control key to make additional selections. Once you've made as many selections as you want, you can then apply the desired formatting to them, copy all of the selections to the clipboard, paste the contents of the clipboard over all of the selections, etc.

Seldom Screen

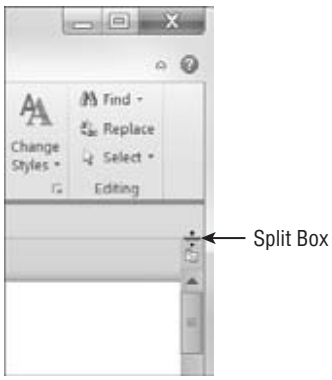
I've already reviewed a few new features that you'll see on the Word screen. Word 2010's repertoire is so vast, however, that you might never notice a few features — some relatively new and some old. In this section I point out features that are often overlooked (even by longtime users), and that you might find useful.

Split Box

Shown in Figure 2-9, the split box is used to divide the current document into two horizontal views. Move the mouse over the top of the vertical scroll bar so that the pointer changes (refer to Figure 2-9). At that point, you can drag down to divide the window into two panes. Alternatively, you can double-click the split box to divide the window into two equal panes.

FIGURE 2-9

Double-click or drag the split box to display the current document in two panes.



Why would you want to do that? Well, you might not have two monitors but you need to look at a table or a figure while you write about it. In a single pane this can be challenging, especially if what you type keeps causing the figure to move out of view.

As another example, you might want to have an Outline view of your document in one pane while maintaining a Print Layout view in the other, as shown in Figure 2-10. When viewing a document in two split panes, note that the status bar reflects the status of the currently active pane. Not only can you display different views in multiple panes, but you can display them at different zoom levels as well.

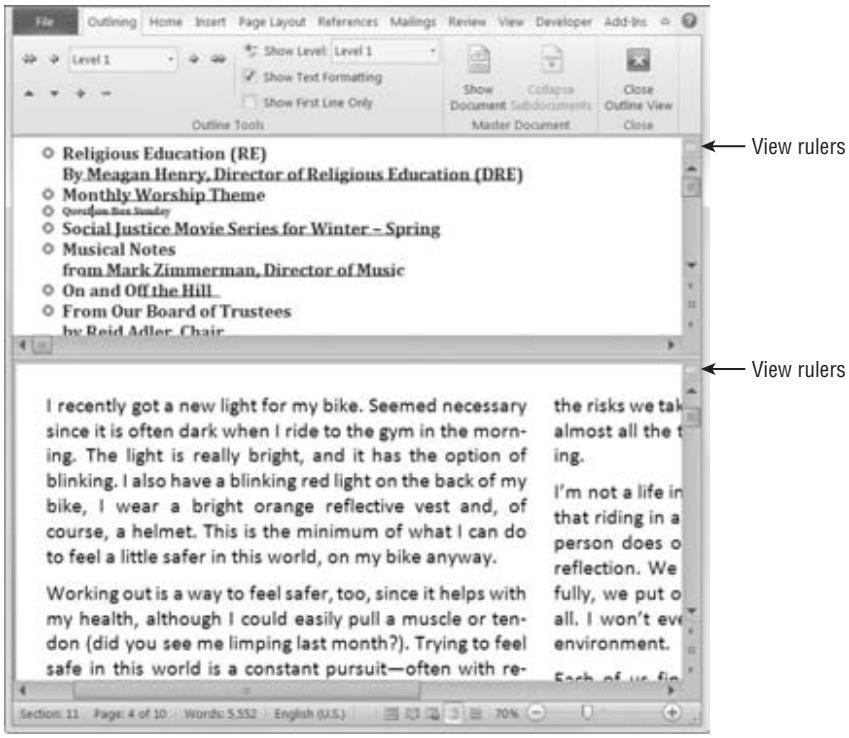
You can remove the split by dragging it up or down, leaving the desired view in place, or double-clicking anywhere on the split line. Alternatively, if the ribbon's View tab is displayed, click Remove Split in the Window group.

View Rulers

Another sometimes-overlooked tool is the ruler toggle control, also shown in Figure 2-10. This control toggles the horizontal and vertical (if it's on) rulers on and off. It cannot control them separately.

FIGURE 2-10

Split panes can be displayed in different views, enabling you to see Outline and Print Layout at the same time.



The presence of the ruler toggle on both panes of a split document window might lead you to assume that the upper and lower rulers can be toggled independently. They cannot.

Select Browse Object

While we're visiting over there on that side of the Word screen, let's take a look at another sometimes-overlooked control — Select Browse Object. Shown in Figure 2-11, this control determines what happens when you click the Previous or Next buttons that are immediately above and below the Select Browse Object control. It also determines what happens when you press Ctrl+Page Up or Ctrl+Page Down.

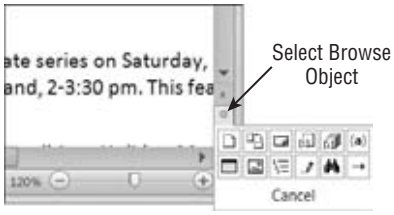
By default, the browse object is set to page. Clicking the Previous or Next button performs page up or page down actions. When the default object type is active, the browse buttons (Up and Down) are black. When a non-default object type is active, the browse buttons change to blue.

For example, click the Select Browse Object button and choose Browse by Table. If you hear an error beep, that means the current document does not contain any tables between the insertion

point and the end of the document. Nonetheless, the browse buttons turn blue, and they now "mean" previous table and next table.

FIGURE 2-11

Select Browse Object determines the actions performed by the Previous and Next buttons.



If you ever click a browse button and don't get the expected default page up/page down behavior, take a look at the color. If the button is blue, then that's the problem. To reset the browse behavior to the default, click the Select Browse Object button and choose Page.

What makes this a little tricky is that there are ways other than clicking that button to change browse behavior. For example, if you perform a search, the browse buttons now become Find Previous and Find Next. If you perform a go to and go to the next field, then previous field/next field become the browse actions. Hover your mouse pointer over each of the twelve object types to explore the possibilities. If you keep these objects in mind, then this feature can become a tool, rather than just an annoyance.

Note

One browse feature is Browse by Edits. Word remembers the current and previous three places where editing occurred (anything that changes the status of the document from saved to *dirty). Hence, when Browse by Edits is the browse behavior, the Previous and Next buttons cycle the insertion point among those four locations. The Shift+F5 keystroke (assigned to the GoBack command) performs the same action as the Previous button when the browse object is set to Browse by Edits.**

***When a document contains a savable change — one that will actually change the contents of the file when saved to disk — it is marked by Word as *dirty*. Some actions make a file dirty, and some don't. If you simply press Page Up or Page Down, or otherwise scroll around in the document, that does not affect the saved/dirty status. If you type a character, perform some formatting, or change a document's properties, however, that will make the file *dirty*, requiring a save to preserve those changes. Typing a character and immediately deleting it also makes a file dirty. That's a useful trick that I describe elsewhere in this book.** ■

Keyboard

With Word 2007 and 2010 come some keyboard changes from Word 2003 and earlier. Perhaps surprisingly, as you'll learn, most legacy keystrokes still work, even though Word's menus are gone.

What works differently? One of my favorite keystrokes is Ctrl+Shift+S, which in Word 2003 and earlier moves the focus to the Style control on the Formatting toolbar. Given that there *is* no

Formatting toolbar in Word 2010 and that there is no comparable Style control on the ribbon, Ctrl+Shift+S pretty much has to be at least a little different. If you still have Word 2003, open it, press Ctrl+Shift+S, tap the first letter of a style that's not currently selected, and then use the down arrow key to go to the style you had in mind. Press Enter to apply the style.

Now try the same thing in Word 2010. Pressing Ctrl+Shift+S activates the Apply Styles task pane, and the keystrokes otherwise seem to work the same way. However, the Apply Styles task pane doesn't go away. It's stays there — in your way, more likely than not.

How do you dismiss the Apply Styles task pane? Well, you could click its X, although that defeats the shortcut key non-mouse advantage of Ctrl+Shift+S. Unfortunately, pressing the escape key simply returns the focus to the document without dismissing Apply Styles. To dismiss it (as well as any other task pane) using the keyboard, press Ctrl+space, C. Note that for this to work, the task pane must have the focus, so you might need to press Ctrl+Shift+S and then Ctrl+space, C to get it to work. Did I mention that not *all* changes are improvements?

Other Built-In Keystrokes

Word boasts a broad array of keystrokes to make writing faster. If you're a fast touch-typist, you might not care to have to reach for the mouse to make a word **bold** or *italic*. You might not want to reach for the mouse to create a hyperlink. If you've been using Word for a long time, you very likely have memorized a number of keystrokes (some of them that apply only to Word, and others not) that make your typing life easier. You'll be happy to know that most of those keystrokes still work in Word 2010.

Rather than provide a list of all of the key assignments in Word, I'm going to show you how to make one yourself. Start by pressing Alt+F8. In the "Macro name" field type **listcommands** and press enter. In the List Commands dialog box choose Current Keyboard Settings and press Enter.

Presto! You now have a table showing all of Word's current keyboard settings. If you've reassigned any built-in keystrokes to other commands or macros, your own assignments are shown in place of Word's built-in assignments. If you've redundantly assigned any keystrokes, all assignments will be shown. For example, Word assigns Alt+F8 to ToolsMacro. I also assigned Ctrl+Shift+O to it. Therefore, my ListCommands table shows both assignments. The table also shows those assignments and commands you haven't customized.

Tip

If you want a list of Word's default built-in assignments, open Word in safe mode (hold down the control key as Word is starting and then click Yes) and repeat this exercise. ■

Office 2003 Menu Keystrokes

One of Microsoft's aims was to assign as many legacy menu keystrokes as possible to the equivalent commands in Word 2007 and 2010, so if you're used to pressing Alt+I,B to choose Insert ➪ Break in Word 2003, you'll be glad to know it still works. So does Alt+OP, for Format ➪ Paragraph. Liking this so far, are you? Great!

Now try Alt+HA for Help ➪ About. It doesn't work. In fact, none of the Help shortcuts work, because that Alt+H shortcut is reserved for the ribbon's Home tab. Some others don't work either, but at least Microsoft tried. If there's something you miss, see Chapter 45. Perhaps you can teach this new dog some old tricks.

Some key combinations can't be assigned because the corresponding commands have been eliminated. There are very few in that category. Some other legacy menu assignments haven't been made in Word 2010 because Microsoft is grappling with some conflicts between how the new and old keyboard models work. There are, for example, some problems with Alt+F because that keystroke is used to select the File tab. For now at least, Microsoft has resolved to use a different approach for the Alt+F assignments. Press Alt+I and then press Alt+F to compare the different approaches.

Custom Keystrokes

You can also make your own keyboard assignments. I cover this in glorious detail in Chapter 45. To get a sneak peak, choose File ➪ Options ➪ Customize Ribbon ➪ Customize.

Tip

If you're a keyboard aficionado, to simplify your life, assign Alt+K (it's unassigned by default) to the `ToolsCustomizeKeyboard` command. Then, whenever you see something you want to assign, press Alt+K and you're off and running. To assign Alt+K, choose File ➪ Options ➪ Customize Ribbon ➪ Customize. Set Categories to All Commands. In Commands, tap the T key to skip to the Ts. Find and select `ToolsCustomizeKeyboard`, Click Press New Keyboard Shortcut Key and then press Alt+K (or whatever other assignment you might find preferable or more memorable). Make sure that Save Changes In is set to `Normal.dotm` (assuming you don't want it saved somewhere else). Click Assign, and then click Close, and click Cancel to dismiss the Word Options dialog box. If you've told Word to prompt before saving changes in `Normal.dotm`, then make sure you say Yes to saving this change (when prompted). ■

Views

To expand the ways of working with documents, Word offers a number of different environments you can use, called *views*. For reading and performing text edits on long documents with a minimum of UI (user interface) clutter, you can use Full Screen Reading view. For composing documents and reviewing text and basic text formatting, you can choose a fast-display view called Draft view.

For working with documents containing graphics, equations, and other non-text elements, where document design is a strong consideration, there's Print Layout view. If the destination of the document is online (Internet or intranet), Word's Web Layout view removes paper-oriented screen elements, enabling you to view documents as they would appear in a web browser.

For organizing and managing a document, Word's Outline view provides powerful tools that enable you to move whole sections of the document around without having to copy, cut, and

paste. An extension of Outline view, Master Document view enables you to split large documents into separate components for easier management and workgroup sharing.

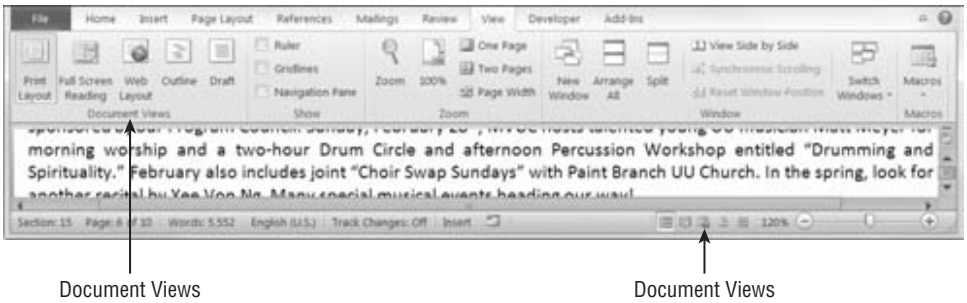
Draft View Is the New Normal View

If you're someone accustomed to working with Word 2003 in Normal view, you might be alarmed to see the view options in Word 2010. Shown in Figure 2-12, they include Print Layout, Full Screen Reading, Web Layout, Outline, and Draft. Where's Normal?

"Normal" as a view name is history. What was Normal is now called Draft. Internally, though, when you click on Draft either in the View ribbon or on the status bar, Word still uses the ViewNormal command. You can confirm this with the following tip.

FIGURE 2-12

Word 2003's Normal view is called Draft view in Word 2010.



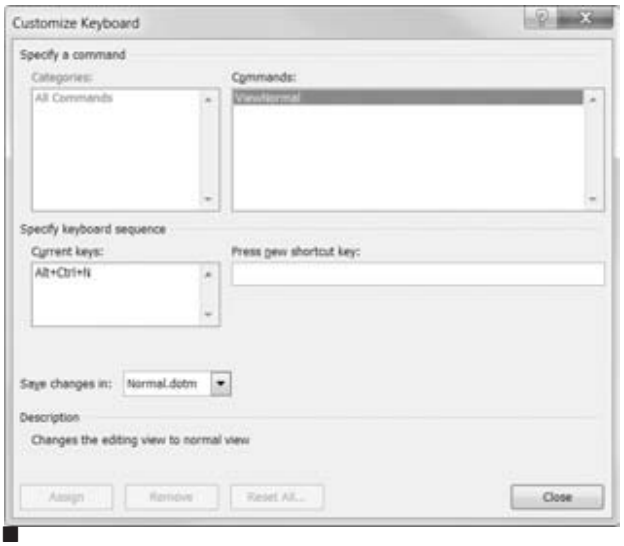
Tip

You can determine Word's name for most ribbon or status bar–based commands with a simple keystroke and a click. First, switch to Page Layout view so that the Draft view command will have an effect. Next, press Ctrl+Alt and the plus (+) sign on the number pad. This turns the mouse pointer into the cloverleaf pattern shown below in the first figure. Use that pointer to click (just about) any tool. Word responds by displaying the Customize Keyboard dialog. The Commands box displays the actual command's name, as shown in the second figure (on the next page). (I'll have more to say about the amazingly useful cloverleaf tool in subsequent chapters.) When in "cloverleaf" mode, Word returns to normal when the Customize Keyboard dialog box is closed, or you can hasten the return to normal by pressing the escape key.

The cloverleaf mouse pointer indicates that the ToolsCustomizeKeyboardShortcut command has been activated.



''Cloverleaf'' mode (the result of the ToolsCustomizeKeyboardShortcut command) displays the next Word command or macro you perform in Word; it responds to mouse and keyboard actions.



If Word is really running ViewNormal, what happened to Draft view? It's still there. In Word's Options dialog box, choose Advanced. Near the bottom of the Show Document Content options, notice the option to Use Draft Font in Draft and Outline Views. You can also choose the font and point size to use for Draft.

Tip

When you need to distinguish among an uppercase i (I), a lowercase L (l), the number one (1) and the vertical line segment (|, usually typed with Shift+\ on most U.S. keyboards), the font that I've found makes the distinction clearest is Comic Sans. It's also a very comfortable and readable font, its nonprofessional-sounding name notwithstanding. If after applying Comic Sans you're still uncertain as to what's what, try toggling the case. Properly distinguishing among these characters, as well as between 0 (zero) and O (capital o), can make a world of difference when you are trying to convey part numbers, serial numbers, user names, and passwords. ■

For editors and writers, Normal view was the workhorse view before Word 2007. It enabled them to focus on just words. When you coupled it with wrapping text to fit the window, you could take off the reading glasses and zoom to any magnification you liked. You didn't have to monkey around with the horizontal scroll bar or bothersome floating pictures to see what was written. It was also faster because its simplicity required less computer memory. You could let the layout editors worry about the placement of pictures and other formatting nuances. If you're used to thinking Normal view, then in Word 2010 think Draft view with the Draft Font view turned off.

If you plan to toggle between Draft and Draft Font views very often, you should know that Word has a built-in ViewDraft command that toggles the Use Draft Font setting on and off. To make

it more accessible, you might either assign it to a keyboard shortcut or put it onto the QAT for ready access. In the QAT customization dialog box, it's in the All Commands list.

Caution

If you do use the ViewDraft command, be advised that font and point size changes will not be reflected in what you see onscreen. This can be good if the original is a legal contract written in four-point type. It can be bad, however, if you don't toggle out of draft mode before sending a .doc file to someone else for review, particularly if you've been careless with the font and point size formatting. ■

Print Layout

If Normal view (now Draft view) was the workhorse view for Word 2003, Print Layout is destined to be the workhorse view for Word 2010. That's because one of Word 2010's strongest features, live preview, does not work in Draft view. Live preview works only in Print Layout and Web Layout.

Full Screen Reading

Full Screen Reading view is similar to Word 2003's Reading Layout view. Shown in Figure 2-13, the Word 2010 view uses more of the screen than the comparable Word 2003 view did. By default, reading mode does not permit editing. Often, this is exactly what you want. But not always. Switch a document into Full Screen Reading view and peruse the different options.

Tip

Full Screen Reading view offers a variety of ways to scroll up and down: Page Down/Page Up, Space/Shift+Space, Enter/Shift+Enter, Right/Left arrow keys, Down/Up arrow keys, the Next/Previous graphic controls at the bottom of the window, and the scroll wheel on your mouse. ■

Web Layout

Web Layout is designed for composing and reviewing documents that will be viewed online rather than printed. Hence, information such as page and section numbers is excluded from the status bar. If the document contains hyperlinks, they are displayed underlined by default, as shown in Figure 2-14. Background colors, pictures, and textures are also displayed.

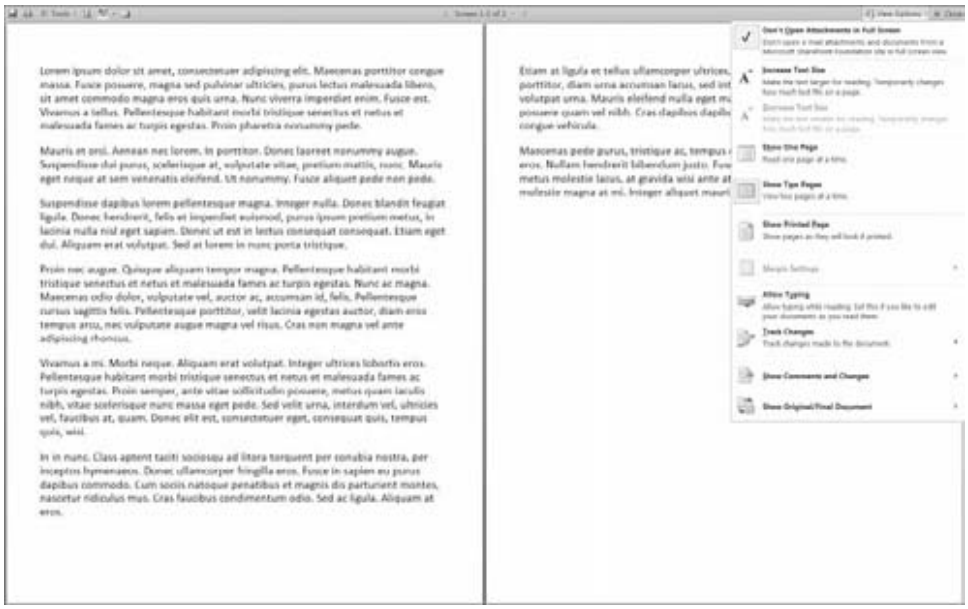
Outline (Master Document Tools)

The final distinct Word view is Outline. Outlining is one of Word's most powerful and least-used tools for writing and organizing your documents. To avail yourself of this tremendous resource, the easiest way is simply to use Word's Heading styles. Heading levels one through nine are available through styles named Heading 1 through Heading 9. You don't need to use all nine

levels — most users find that the first three or four are adequate for most structured documents. If your document is organized with the built-in heading levels, then a wonderful world of document organization is at your fingertips.

FIGURE 2-13

Word 2010's Full Screen Reading view features a number of view options.



As suggested by the title of this section, Outline view has a split personality, of sorts. As an outline manager, this view can be used on any document with heading styles that are tied to outline levels. (If you don't want to use Word's built-in Heading styles, you can use other styles and assign them to different outline levels. I cover the myriad tricks you can use for outlining in Chapter 4.)

Outline view's other personality is the Master Document manager. Compare the two ribbons shown in Figure 2-15. Both say Outlining, yet the lower ribbon contains additional tools. To display the additional tools, click Show Document.

I cover the Master Document feature in horrific detail in Chapter 34. For now, though, I'll just dish out a little warning. Potentially, this is an extremely powerful document control feature for users who are working on parts of the same document. It provides a way to carefully control the checking out and checking in of document parts, as well as to manage problems inherent in working with very large documents.

In previous versions of Word the Master Document feature was quite unstable, leading to the adage "There are two kinds of master document users: those whose documents are corrupted, and those whose documents will soon be corrupted." Is this harsh assessment still true or does the existence of a Word document format based on XML relegate those concerns to history?

The jury is in: The Master Document feature in Word 2010 remains word processing's answer to Conan the Destroyer. Use it only if you enjoy pain and frustration.

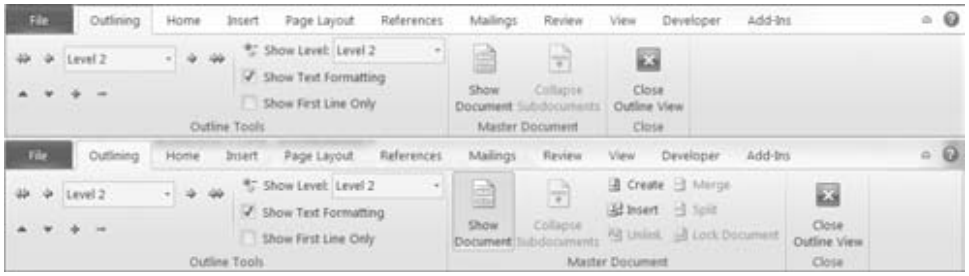
FIGURE 2-14

Web Layout suppresses paper-oriented information such as page and section numbers, and includes web-oriented features such as underlined hyperlinks and background colors and textures.



FIGURE 2-15

Click Show Document to display the Master Document tools.



Saving

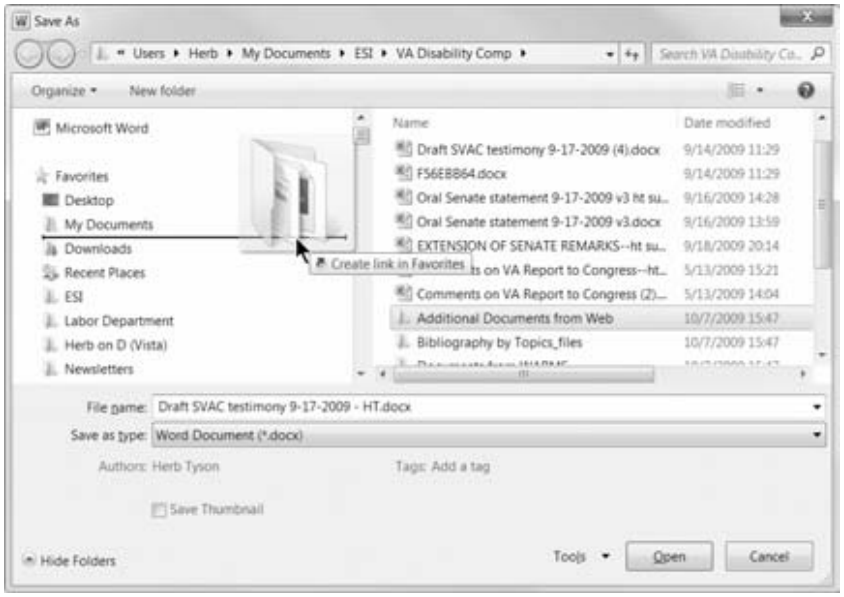
What good are any of these tools if the information never leaves the Word window? At the end of the day, the goal is to create letters, reports, brochures, pamphlets, books, web pages, blogs, and other publications that take on some kind of semi-permanent existence. As long as you see "Document1" in Word's title bar, you run the risk of losing your investment of time and creativity.

Word is like most other Windows programs. When you're ready to commit your work to disk, just choose File ➪ Save from the menu. Whoops! What menu?

Like most other Windows programs, you can press Ctrl+S to save the current document. If it is new and hasn't been named, you'll see the Save As dialog box shown in Figure 2-16, or something similar. If the document isn't new, Ctrl+S does an immediate save using the existing filename.

FIGURE 2-16

Add frequently used folders to the Favorites area (see the following tip) to make saving and opening files faster.



Tip

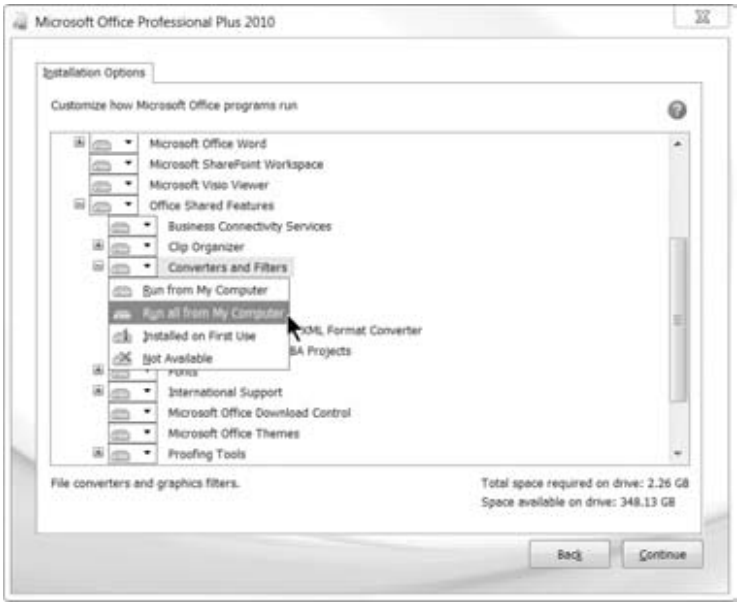
To add a folder to the Favorites area, select and drag the folder from the list of files and folders and drop it into the Favorites area. For example, in Figure 2-16 the Additional Documents from Web folder is selected. When dragging, make sure you drop the folder into an existing link. The line and screen tip in Figure 2-16 provide positive confirmation that the folder will land in Favorites — not in an adjacent folder. ■

Note also the "Save as type" field under "File name." The list of formats you will see varies depending on how much of Office was installed. To have the fullest array of save options you should do two things.

First, in Word or Office setup (in Programs and Features in Windows' Control Panel), navigate to Office 2010's (or Word 2010's) Installation Options section, and set Converters and Filters to "Run all from My Computer," as shown in Figure 2-17. Click Continue as needed to complete the installation. Note that you need do this only if the full set of converters isn't already installed.

FIGURE 2-17

To maximize your Save and Open options, install the full set of converters.



The second thing to do is to go to the Microsoft Office website and download the converter pack. Installed, this pack adds the fullest range of converters to your Office 2010 setup. Note that the location and name of this free add-on varies. At this writing, however, it is located here: `www.microsoft.com/downloads/details.aspx?FamilyID=cf196df0-70e5-4595-8a98-370278f40c57&DisplayLang=en`

You can also search Microsoft's website for `OCONVPCK.EXE`.

Convert

You will see the Convert option (in the Info tab when you click File) only if the current file is from an earlier Word format (e.g., Word 97–Word 2007, which causes [Compatibility Mode] to appear after the filename in Word's title bar). Clicking the Convert button converts the current file into Word 2010 `.docx` format (which is not identical to Word 2007's `.docx` format).

Caution

Make a copy of the file or save the file under a new name *before* clicking Convert. The Convert option renames the original file — the `.doc` version will be gone. The first time you convert, Word does alert you to what it's doing, but if you're like most users you won't read the fine print and you'll click "Do not ask me again about converting documents." If you do happen to click that option, in the future there will be no warning; and if you're like me, you will forget it was there the first time.

When you convert, Word converts the document currently displayed to Word 2010 `.docx` format. At that point, the notation "(Compatibility Mode)" disappears from Word's title bar, but the displayed name still

shows .doc instead of .docx (unless it was Word 2007 .docx, in which case it does not change). Even so, at this point you can still recover the original file by closing the file without saving the changes. Until you save, the converted file exists only in the current window.

However, if you now save the file, Word immediately renames it (if it was .doc) using the new extension (.docx for a plain vanilla Word 2010 document file, or .docm for a Word 2010 document file that contains macros). Once converted, the original .doc file is gone forever! After the fact, you can perform a save as and resave the file in the original format. However, I'm not going to guarantee that it will be byte-for-byte identical to the original. The file is also replaced if it's a Word 2007 .docx file, and there is no going back in that case. Word 2010 does not provide a way to save in Word 2007 .docx format. ■

Save and Send (Formerly Publish)

Word 2010 has replaced Word 2007's Publish set of commands with Save and Send. Shown in Figure 2-18, these options all result in Word content's ending up online. Depending on what else you have installed, you might see different options from those pictured. I'm going to talk a little about the Blog feature here. You'll learn about the other features in later chapters.

FIGURE 2-18

Word 2010 has a variety of sharing options for putting Word content online.



Blogging

The Blog feature enables you to publish directly from Word to supported blogs. Which blogs are supported? At this time, Windows Live Spaces, Blogger, SharePoint blog, Community Server, TypePad, and WordPress are supported. You might also have success with some services that support the metaweblog and ATOM APIs. For additional information see Chapter 30.

Just Dive In

Even if you're an old hand at Word 2003 — maybe even if you've been using Word 2007 for a few years — there are some new wrinkles in Word 2010, so you might want to follow along. I'm going to assume that you're connected to the Internet. Ready? We have 15 minutes, so let's get started.

Start Word

There is no single way to start Word. A number of different ways are shown in "Starting Word" at the beginning of this chapter. If you know how to start Word, do so now. Otherwise, click Start ➪ All Programs ➪ Microsoft Office ➪ Microsoft Word 2010.

Creating a New Letter

If I wanted to cheat, I'd have you type the letter in the Document1 window, but the letter would end up being more difficult to work with. Therefore, instead click File ➪ New.

Note

When I say "click File," I mean for you to click the File tab in the upper left-hand corner of Word's window. ■

The New window, shown in Figure 2-19, is itself new in Word 2010, so even if you're accustomed to Word 2007 you're probably unfamiliar with what you're seeing. In the middle — to the right of Office.com Templates, notice the Search box for locating online content. In the search box, type **thank you letter** and press enter.

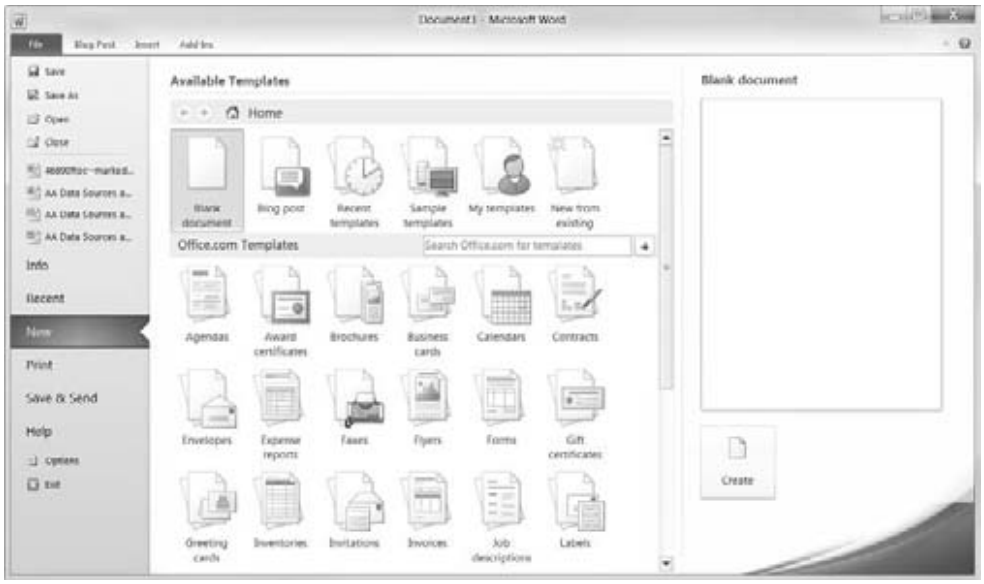
At this writing, only three templates appear, and one is named "Thank you letter for personal gift." With it selected, click Download, which appears below the template preview at the right. If you see the Microsoft Office Genuine Advantage dialog, stop your timer, click Continue, and then restart the timer after the letter opens.

When the new document based on the downloaded letter template appears, immediately save it. That way, no matter what happens during this session, you won't have to go back to square one. Click File ➪ Save. Because this is a new document, the Save As dialog box appears. You can accept the default name or type a new name. I suggest you type a useful new name, such as **Practice Word 2010 Bible Letter**. Click Save. Depending on the vintage of the chosen

template, you might also be asked whether you want to save the document "to one of the new file formats." If so, click OK.

FIGURE 2-19

Word 2010's approach to creating new documents is new.



Tip

As you work on this and any other document, press Ctrl+S frequently. Word 2010 is a lot of things, but it's not perfect. It can crash from time to time, and the more recently you've saved your work, the less you'll have to redo when a crash happens. ■

Initial Setup

In the letter, click on Your Name, shown in Figure 2-20. Type your name there. Your typing replaces the placeholder field that was there. Continue typing to provide your address details.

The date shown should be the current date. What you're actually seeing is a CREATEDATE field (see Chapter 21 for more on fields). You can accept the date, replace it, or convert it into *hard text* (a common term for actual fixed text as opposed to field code results, which can change). To replace the field code with a different date, select the date, shown in Figure 2-20, and start typing.

However, if you are planning to print and send the letter today, I recommend that you convert the DATE field code into hard text, so it can't automatically change to a different date later on. To do this, click anywhere inside the date and then press Ctrl+Shift+F9 (Unlink Fields).

Remember this keystroke: It will come in handy often when you are working with Word documents.

Caution

If you leave the field code as is, it will remain fixed as the day the document was created, which might not be the date the document is signed and mailed. This can wreak havoc on recordkeeping if you need to know when the document was actually sent. Some methods of copying files can also change the create date, which can cause still more havoc. ■

FIGURE 2-20

The split screen shows that the date is a field code; by default selected date field codes are displayed as shaded text, which makes them hard to confuse with normal text.



Below the date in the letter, use the spaces provided to enter the recipient's name, title, company name, and address details, followed by the recipient's name again, next to Dear.

Write It and Format It

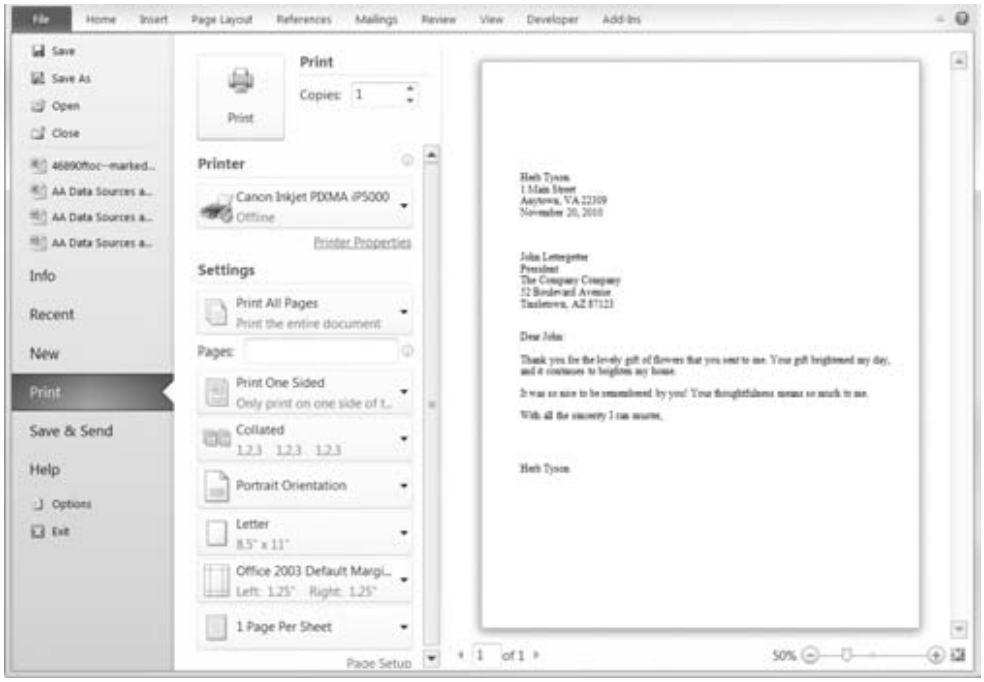
Under the salutation, replace any or all of the text provided with your own text, or adapt the text shown to meet your needs. Add your name and title in the spaces provided at the bottom of the letter.

Save It and Print It

Great! You're almost done. Press Ctrl+S to save the document. To print immediately, choose File ➪ Print ➪ Print. Notice that Word 2010 incorporates Print Preview into the main Print dialog, as shown in Figure 2-21.

FIGURE 2-21

You can save paper by using Print Preview to see how your document will look when printed.



Print an Envelope

In a perfect world the letter template is designed so that the envelope picks up the recipient address from the letter. This letter template, alas, is not perfect, so we'll have to print an envelope the old-fashioned way, with a little bit of help.

Select the recipient address and press Ctrl+C to copy the selection to the Clipboard — but leave the recipient address selected. In the Mailings tab, click Envelopes. In Delivery Address, the selected text should appear in the space provided. If it's not there or if what's there is not correct, then click that box, press Ctrl+A, and then press Ctrl+V to copy the Clipboard's contents into the Address field. Add your return address (unless you're using a preprinted stationery envelope).

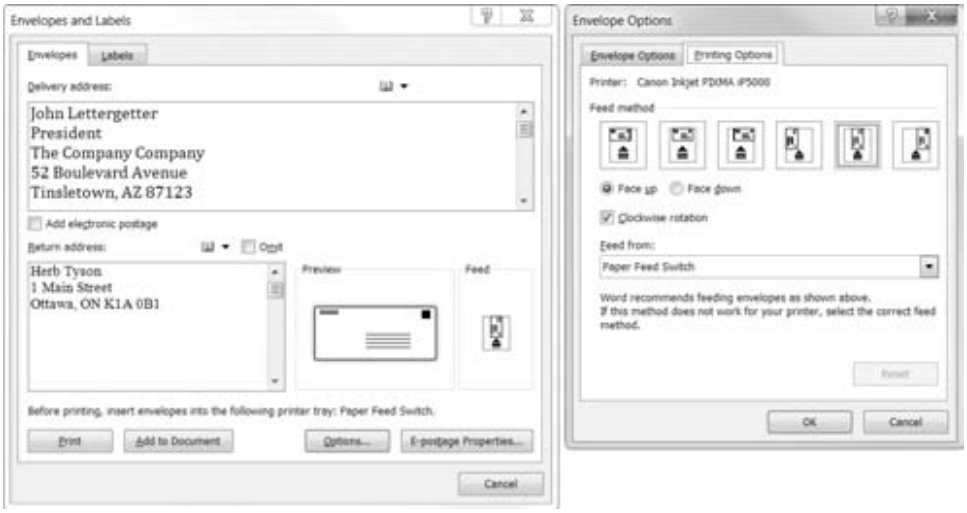
If you don't use standard-size envelopes, click Preview and choose the envelope size you use. Next look at the feed, shown in Figure-22. If the diagram doesn't match how you feed envelopes to your printer, click Feed and choose the correct setting.

Tip

For me, scrap paper is cheaper than envelopes. Sometimes you can conserve envelopes by printing a test envelope to the blank side of a scrap piece of paper. This will indicate how your printer expects envelopes to be fed. Orient your envelope accordingly. ■

FIGURE 2-22

You can save envelopes by making sure that Word and your printer agree. Of course, you can save even more envelopes by sending e-mail instead!



After all the settings are made, click Add to Document so you can preview the envelope. If it then looks OK, go ahead and print as shown earlier. You're done!

Summary

In this chapter you've seen a variety of ways to start Word 2010 as well as a number of navigation techniques that might be new to you. You've also explored how to modify Word's view to fit your work style and needs, and some of the finer points about saving, converting, and sharing in Word 2010. Finally, putting it all together, you should now have no problem doing the following:

- Creating a startup method that meets your needs
- Impressing your friends with cool navigation tricks and tips
- Viewing your work in different ways for different kinds of writing and editing
- Converting Word 2003 documents to Word 2010, and vice versa
- Writing and printing a letter and an envelope to go with it

CHAPTER 3

Where in the Word Is . . .?

Imagine . . . you take delivery on that new car and you're all set to go. They hand you the keys. You open the door and get in. You close your eyes and take in that new-car smell. "Ahhh," you sigh. "Nothing like the smell of new leather." Then you open your eyes. You blink a couple of times. Then you exclaim, "Where's the steering wheel? Where's the gas pedal? Where are the brakes? And why are there so many windows?"

In some ways, that's what Word 2010 feels like to a Word 2003 user. It's like a new car — a *very* new car that is different from anything you've driven previously, but because you've heard that this car can actually fly, has satellite navigation, and gets 250 miles per gallon, you have a pretty powerful incentive to give it a try.

Much of what you knew and loved (or hated) about Word 2003 is still there. The question this chapter answers is: Where did they hide it? This chapter also explains what features and capabilities are gone, so that you don't beat your head against the wall looking for what's not there.

There are some pretty cool tools to help you find out what went where. Some of them are even built into Word 2010. This chapter shows where to find and how to use those tools. In a hurry? Jump to Appendix A for the Word 2010 Bible's handy reference.

IN THIS CHAPTER

- **Using Help's Word 2003 command reference**
- **How to find "missing" menu commands**
- **How to find lost toolbar commands**
- **Legacy features that were retired**

Using Help to Find Out Where It Went

I admit that I'm the first to disparage certain aspects of Office's Help system. I really don't care for indexed help systems because their usefulness depends on my having the same mindset and vocabulary as whoever did the

indexing. However, in the case of showing Word 2003 users where the corresponding Word 2010 commands are, Microsoft has done a good job. If you prefer not to navigate the Help system, that's fine. Jump to Appendix A in the back of this book, where you can quickly see where Word 2003 features are hidden in the new version. If you don't always carry the Bible around with you as you're out on the circuit converting nonbelievers to Word 2010, this chapter will show you how to find the built-in command and menu references.

In the old Westerns, answering the question "Which way did they go?" often meant looking for hoofprints. In Word 2010, it's a bit easier.

To begin, press F1. Click the drop-down arrow to the right of Search at the top of the Word Help window, and ensure that "Content from Office.com" is active instead of "Content on this computer" (the latter should have an X circled in red next to it). Next, in the Search box, type **word 2003 menus**, and press enter (or click Search). Click Get Started with Word 2010. Scroll down a little to "Missing the menus?" and click the "Interactive command-mapping guides" link, shown in Figure 3-1. This will start your web browser.

Once your browser loads, look for the link for the Interactive Guide for Word, and click it. (Alternatively, you can click Printable Reference.) If you're running the interactive guide, once it loads, click Start. This starts an interactive online Java applet.

FIGURE 3-1

Microsoft provides an interactive Java applet to help Word 2003 users find their way around Word 2010.



Menu Commands

Choose menu commands as if you were using Word 2003. When you reach a terminal command, the interactive guide shows you how to access the same command in Word 2010. If the command doesn't exist in Word 2010, the guide indicates that also.

Note that the guide does not show you context (or pop-up) menus. That's because Word 2010 still has context menus. In many cases, however, they are not identical to Word 2003's context menus, and you will need to rely on the ribbons or the QAT, or use other methods to meet the same needs.

Toolbar Commands

To learn the location of Word 2003 toolbar items in Word 2010, hover the mouse over the tool you're looking for. Unfortunately, you are limited to the Standard and Formatting toolbars. For other toolbar commands see Appendix A in the back of this book.

RIP: Features Removed from Word

A number of features have been completely removed from Word 2010. In some cases, there are ways to accomplish the same things in the new version of Word. In other cases, such as when features were removed for security reasons, there is no going back. In fact, in case you didn't notice, a number of things suddenly became impossible after you upgraded to Windows XP Service Pack 2, Vista, or Windows 7, so there isn't much point in mourning their loss now, months or years after they were retired.

Routing Recipient

In Word 2003, two options on the File ➪ Send To menu enabled you to attach an electronic routing slip to a Word document, as shown in Figure 3-2. A copy of the current document was automatically protected for editing in Track Changes mode and could be routed to a list of recipients.

The routing slip could be edited with the built-in Word command `FileRoutingSlip`. The command still exists in Word's vocabulary. When you run it, though, you're politely informed that "This command is not available on this platform." Could they possibly mean Platform $9\frac{3}{4}$? (If you have no idea what I'm talking about, then you probably aren't familiar with Harry Potter.)

In any case, the capability is gone from Word, and there is no migration path in Office 2010. If you used this feature before, you might find suitable replacement functionality in SharePoint or SharePoint Workspace.

FIGURE 3-2

Word 2003's routing capabilities are gone.



File Search

Once upon a time Word did not have the capability to search the filesystem. If you needed to search the filesystem, you sought other utilities to do so. After several file-searchless versions, however, Word gained that capability. Unfortunately, it didn't work properly sometimes, hampered by limitations that wouldn't let it "see" files in path+filename combinations of more than 255 characters. Several versions were also noted for returning "Not found" if the list of matching files to be searched contained more than 255 files. This resulted in a rather limited and often confusing utility.

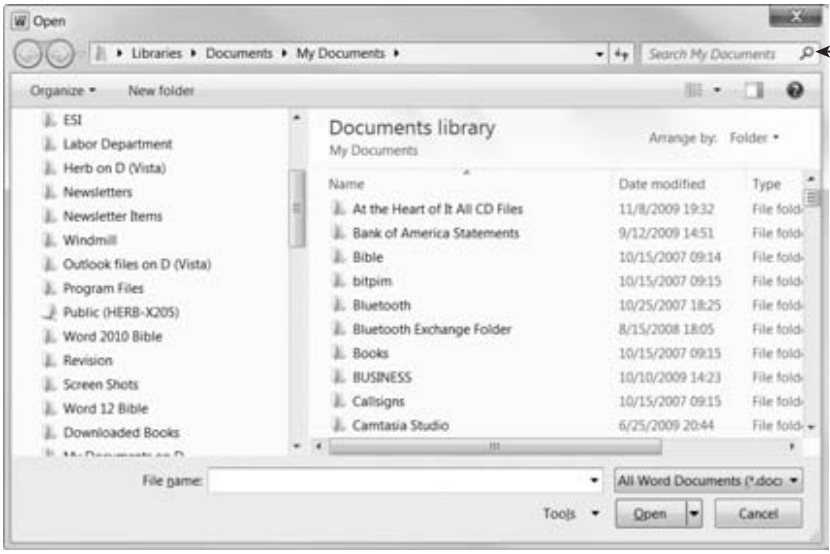
In Word 2000–2003, those limitations were basically eliminated, but the user interface was slowly made less usable. As a result, few people could discover how to use this feature, let alone use it successfully, and few Word users actually ended up using it.

In Word 2010, therefore, we're back to where we were once upon a time when Word itself couldn't search the filesystem. However, Word 2010 in Vista or Windows 7 doesn't *need* its own file search. The capability is built into Windows Explorer, and therefore appears in all of Word's file dialog boxes, as shown in Figure 3-3.

And maybe we're actually better off this way. Because `.docx` files are really compressed ZIP files, someone whispered into Windows Explorer's ear that it now needs to search the `*.xml` files contained in `.docx` "containers." This greatly improves the chances of finding what you're looking for!

FIGURE 3-3

Word 2010 uses Windows Explorer's search facilities in all file-oriented dialog boxes.



Because of Word 2003's binary format, it was sometimes possible that combinations of bytes would accidentally look like real words, giving you occasional false positive "hits" when searching. It was also possible that strings you were looking for would contain intervening bytes that produced false negatives. Because the `document.xml` component in `.docx` files actually contains no binary encoding, there should be many fewer errant hits or non-hits (see Chapter 5).

Normal View

If you came to this chapter before reading Chapter 2, you'll be pleased to learn that Normal view isn't really gone. It's simply been renamed Draft view. See the section "Draft View Is the New Normal View" in Chapter 2 for the full scoop.

Word 2003 Templates

If you came here from Word 2007, all your existing templates and customizations will work just fine in Word 2010. This section is for users who are fresh off the Word 2003 boat.

The good news is that many user customizations from Word 2003 (and earlier) `.dot` files survive quite nicely in Word 2010. This includes customizations that might be stored in `.dot` files as well as in `.doc` files. If you're upgrading and trying to decide whether to remove Word 2003 or leave it in place, if you have room, leave Word 2003 for now. See what works and what doesn't. Then, if you can't live without some Word 2003 tools and customizations, you can still

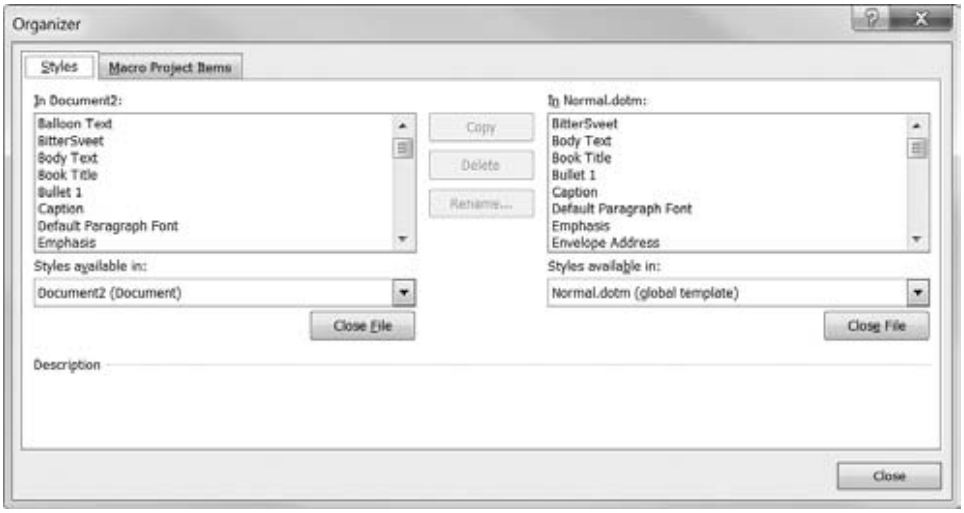
use Word 2003 for those, until or unless you develop superior enhancements using Word 2010's capabilities. When you upgrade from Word 2003 to Word 2010, it will automatically use your Word 2003 `Normal.dot`, existing AutoText entries (although implemented differently), and any other global templates.

Word templates house the following kinds of customizations in Word 2010:

- **Styles:** Your Word 2003 styles should continue to work fine in Word 2010. In time, however, you likely will want to take advantage of Word 2010's enhanced formatting capabilities.
- **Macros:** As long as you aren't using unsupported commands (such as `FileRoutingSlip`), most VBA macros written for Word 2003 will work without modification in Word 2010.
- **AutoText:** Your Word 2003 AutoText entries are carried over into Word 2010, but the implementation is quite different. See Chapter 13 for the full details. Note that AutoText entries, while residing in `.dot` files, can no longer be managed using Word 2010's Organizer (see Figure 3-4).
- **Keystrokes:** Your keystroke customizations that might be stored in Word 2003 `.dot` files will work just fine in Word 2010, unless you assigned discontinued commands and features, of course.
- **Toolbars:** Customizations to built-in toolbars are completely lost. Some user-created toolbars will retain some functionality, but you will not be able to maintain or change them using Word 2010 tools. Any that survive will be displayed in the Add-Ins ribbon.

FIGURE 3-4

Word 2010's Organizer lets you manage only styles and macros.



Toolbars

Word no longer has the kinds of toolbars that were part of Word 2003 and earlier. When you upgrade to Word 2010, user-modified versions of built-in toolbars, such as Formatting and Standard, are not retained in the upgrade in any way, shape, or form. User-created toolbars, however, are displayed in the Add-Ins ribbon, and retain most of their functionality from earlier versions of Word, though you cannot change them using Word 2010.

Multiple customizable and context-sensitive toolbars have been replaced by the single Quick Access Toolbar, which is customizable, but not context-sensitive. You can, however, save different versions of the Quick Access Toolbar in different documents and templates (but not in documents saved in compatibility mode). And, unlike in Word 2007, Word 2010's user interface now lets you customize the ribbon.

Menu Customization

Word 2010 no longer has a menu (unless you call Home, Insert, Page Layout, etc., a menu), and you can't customize what's not there. Word does still have context-sensitive right-click menus. However, unlike in previous versions of Word, the user interface no longer provides a way to customize them. Existing customizations from Word 2003 are not retained in the upgrade to Word 2010. As noted, however, the ribbon interface is customizable (see Chapter 47). Or, if you want to make the investment, you can either buy or reinvent the menu interface using XML programming, which is beyond the scope of this testament of the Word 2010 Bible.

Charting Options/Features

Word 2003 supported certain alignment adjustments for formatting within Organization Charts and other Diagrams, objects placed on the Drawing Canvas and objects placed on the page. With the object selected, Word 2010 no longer supports Draw ➪ Align or Distribute Relative to the following:

- Page
- Organization Chart
- Diagram (any type)
- Canvas

Office Assistant

The Office Assistant, better known as Clippy, has been forced into retirement. Clippy was loved by some, hated by others. Clippy's legacy is a wealth of humor that certainly makes even "his" worst detractors smile. I'd include a link to some of the better Clippy-inspired videos, but this book is G-rated. If you're curious, search the Internet for "clippy video."

Send for Review

File ➪ Send to ➪ Mail Recipient (for Review) is completely dead in Office 2010. There is no built-in alternative for users who relied on Send for Review for workflow control. They will have to look elsewhere — e.g., Windows Workflow Foundation, Microsoft Office Server, or SharePoint — for similar functionality.

You can still send a document for review without having access to Office Server, Sharepoint, etc. Simply click Track Changes on the status bar (if it's not there, right-click the status bar and turn on its display), and then choose File ➪ Share ➪ Send as Attachment. However, you won't get built-in handling and control of the workflow process.

Eastern European Font Add-In

This feature was added to Office a number of years ago to deal with code page dependencies on very old computers in Eastern Europe. It tried to solve various font mapping problems — ensuring that what was typed on a computer in Eastern Europe was what someone else would see and print when the file was opened on a different computer.

When earlier code pages are used in Word 2003, you see Fix Broken Text as an extra option in the Tools menu. That capability is not built into Word 2010. The problem no longer occurs.

Animated Font Text Effects

The Font dialog box in Word 2003 had a number of animated text effects that you could apply. My favorite (not!) was Marching Red Ants. The very thought of it gave me nightmares.

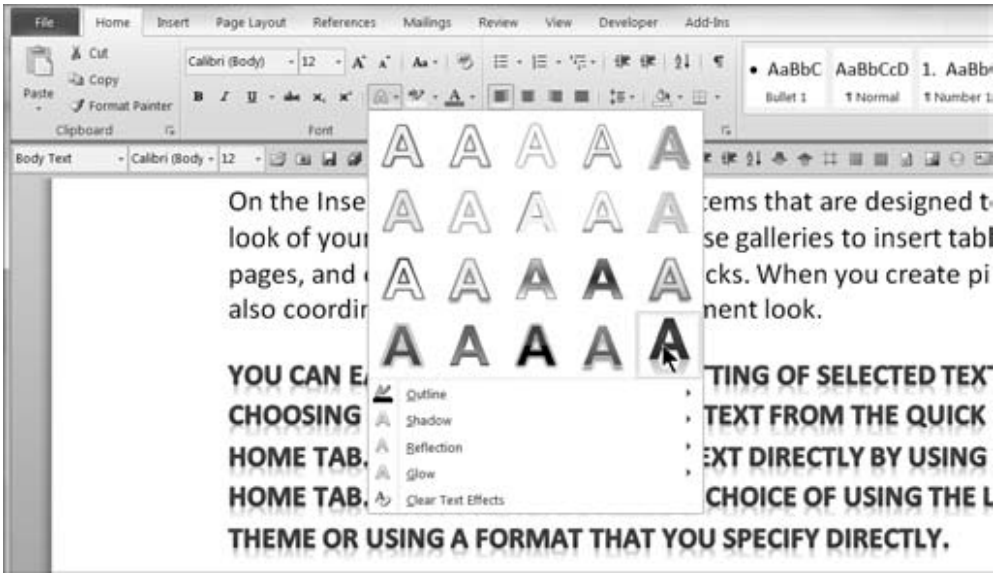
In any event, this feature is gone. I say "Good riddance!" Note that some users (and I'm one of them) have a physical sensitivity to certain kinds of onscreen animation. As a group, we were not at all sad to see this feature fade into history. Microsoft's stated reason is that the feature was originally for "website design," but that "it is no longer useful for modern site design." The technical term for "no longer useful for modern design" is *tacky*.

If you open a legacy document, animated text effects will still display in Word 2010. Furthermore, if you tell Word to "Update the Style to reflect recent changes," it can actually include those text effects in the current style definition. This gives you a way to continue to use text effects in Word 2010. In Word 2003 you might, for example, create styles named Marching Red Ants, Marching Black Ants, and so on, and permanently save those styles in `Normal.dot` or some other template. When Word 2010 inherits your Word 2003 styles, based on `Normal.dot` (for example), you can then use those styles in Word 2010. Presto! Like the Phoenix, text effects rise from the ashes. The spirit of tacky web design lives on!

Word 2007 didn't have anything of its own to replace animated text effects. Word 2010 *does*. For lack of anything better to call the new feature, Microsoft calls it (drum roll) . . . Text Effects. As shown in Figure 3-5, the new feature can be accessed from the Font section of the Home tab, and incorporates live preview.

FIGURE 3-5

Word 2010's new Text Effects feature is entirely different from the same-named feature from Word 2003 and earlier.



Mail Barcodes

Easy access to mail barcodes has been removed, probably at the insistence of the United States Postal Service (USPS). According to Microsoft, the feature was removed because "barcodes generated by Word are often inaccurate and result in the mishandling of mail by the USPS." I find this amusing. A wrong barcode doesn't lead to mishandling of mail by the USPS. The mail wasn't mishandled; it was *misbarcoded*. Way to shift the blame, Microsoft!

The USPS was polite but insistent that Microsoft should either fix the feature or remove it from the product. Microsoft did the latter, but not completely. If you really want bad barcodes, you can use the BARCODE field. See Chapter 21 for more on using fields. Note, however, that I said if you want bad barcodes, not if you want barcodes badly. There's a difference, and bad barcodes are what you get if you use this feature.

WordPerfect-Related Options

Once upon a time Word wanted to accommodate WordPerfect users so that they would be more likely to move to Word. The accommodations were as follows:

- Help ➪ WordPerfect Help
- Tools ➪ Options ➪ General ➪ Help for WordPerfect users

- Tools ➪ Options ➪ General ➪ Navigation keys for WordPerfect users
- Tools ➪ Options ➪ General ➪ Blue background, white text

The problem with those accommodations was that they were based on WordPerfect 5.1 for DOS. When WordPerfect for Windows came out and most of the WordPerfect world had long ago left the DOS versions behind, each and every version of Word up through Word 2003 still sported those same WordPerfect "accommodations."

At best, only the last one, "Blue background, white text," had much utility or resemblance to contemporary WordPerfect. At worst, these options changed the way Word's keyboard worked, and probably aggravated a lot more WordPerfect users than they ever accommodated. The absolute worst was the infamous "Delete Block? No (Yes)" prompt that appeared when you tried to delete selected text with either "Help for WordPerfect users" or "Navigation keys for WordPerfect users" enabled. Users who came to Word from, say, WordPerfect 11 had no clue what that prompt was. They had apparently thought that choosing WordPerfect keys was going to *help* them get used to Word.

In any case, none of these "accommodations" are included in Word 2010 — in fact, they were removed as of Word 2007. The bad news is that if you really liked white text on a dark blue background, but only in Word, you can no longer arrange that using the simple setting. This leaves you with two options, neither completely satisfactory.

One option is to make the change system-wide using Windows' "Change window colors" settings. Unfortunately, this will affect all of Windows, including Internet Explorer, Excel, Notepad, and so on.

To affect only Word, you could change the default page setting to dark blue. With font color set at Automatic (its default), the text color will automatically change to white. Unfortunately, there is no way to set the default page color and save it to `Normal.dotm` (or any `.dotm` file, for that matter).

However, you can save default page colors in `.dotx` files, so one solution would be to create a page-color-setting-only `.dotx` file. Then create a Windows shortcut based only on that `.dotx` file (you don't need to create a Word shortcut). When you double-click (or click, depending on your settings) that shortcut, Word will create a new document based on it.

Note

Word displays page colors in Print and Web Layout views as well as in Full Screen Reading view, but not in Outline, Draft, or Print Preview. If you really want the full blue treatment in Word 2010, the only way to achieve it is to change the system colors, which means that black-on-white windows become white on dark blue throughout Windows. ■

Web Components

Prior to Windows XP running under Service Pack 2, Word 2002 and Word 2003 supported the insertion of certain kinds of ActiveX controls dubbed *web components*. If you still have Word 2003, check the Insert menu. You likely will see Web Component listed, and it very likely is grayed out as unavailable if you are running Windows XP SP2 or later (e.g., Vista and Windows 7).

These were disabled as part of a security update in later versions of Windows. There is no workaround to restore this functionality in Microsoft Word. Certain web components can be inserted by means of an HTML-authoring program such as Expression Web or SharePoint Designer, but ActiveX web components are off-limits. If you need those controls, you need to look outside the Microsoft Office product group. Note that this does not refer to ActiveX controls used for forms, which are still accessible from the Developer ribbon tab (Legacy Tools ➪ ActiveX Controls).

Summary

The removal of top-level menus and toolbars from Word 2010 leaves Word 2003 users wondering how to find tools and commands they're accustomed to using. Discoverability is one thing, but it doesn't seem to be the same as *re*discoverability. In this chapter, you've learned how to do the following:

- Use the Help system to locate "missing" menu commands
- Use the Help system to locate commands that used to reside on Word's toolbars
- Stop searching for commands that have been retired from Word
- Use or create alternatives when Word 2010 no longer provides tools and features to which you've grown accustomed

CHAPTER 4

Making Word Work for You

Leverage is power. This chapter provides a quick introduction to Word's power features, including styles and outlining. These are features that users should know about when they first start a new document, but usually don't discover until it's too late to realize their maximum benefit. This chapter provides an overview of these features, which are covered in greater detail in subsequent chapters.

IN THIS CHAPTER

- Using styles for organization and leverage
- Using outlining for organizational control
- Using AutoCorrect to save time
- Top 10 power user tips

The Style Advantage

So what is a style, anyway? A style is a collection of formatting attributes that you can apply to text in a document. A style can contain information about the typeface (including whether it's regular, italic, bold, or bold italic), point size, text color, shading, borders, effects (such as strikethrough, superscript, subscript, etc.), underlining, and even language. A style also can contain additional information about spacing, indentation, line and page break behavior, numbering, and bullets.

What are styles good for? If you routinely encounter situations that require the application of multiple formatting attributes to certain kinds of text (e.g., headings, book titles, lists, etc.), using styles can save you time by applying all those attributes in one fell swoop. Using styles can also improve formatting consistency, making your documents look more professional.

Suppose, for example, that in the course of applying a half dozen formatting attributes to achieve a certain "look" for a heading, you forgot an attribute here and there, or maybe the indentation isn't exactly what it was last time. This gives your document an uneven and unprofessional look and feel. In the case of headings, it can also make a document harder to follow, creating confusion in the reader's mind about which heading levels are equal to one another and which ones are subheadings. Consistency also helps your

reader understand how the content is organized, as well as how to distinguish among book titles, chapter titles, and magazine article titles when you encounter them in the text.

Another advantage of styles is the leverage they give you when and if someone wants something changed. For example, if a client or your boss doesn't like the way headings are formatted, and you didn't use styles, you could be in for a lot of arduous work in effecting the changes, particularly if it's a long document. If you use heading styles, however, all you have to do is change the style definitions, and all text formatted with that style automatically changes.

Styles versus Direct Formatting

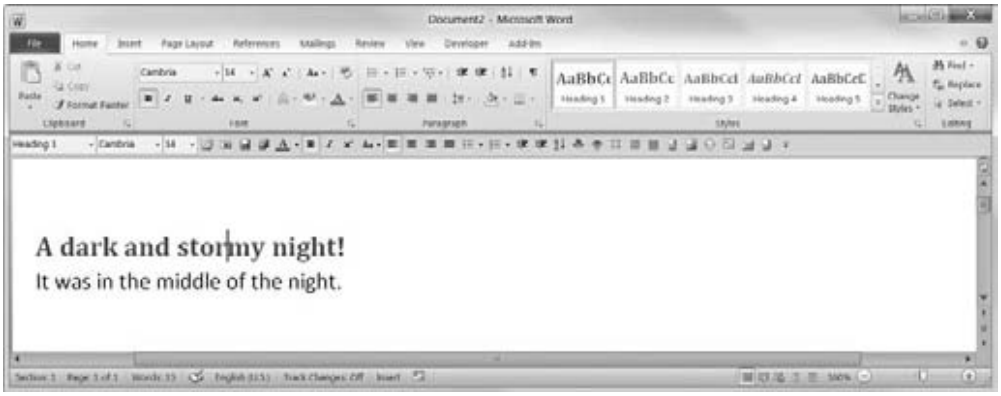
When I type a heading, I might select it, press Ctrl+B (bold), and then launch the Font dialog box to apply the Small Caps effect and perhaps choose a larger point size. I might also launch the Paragraph dialog box to change the indentation and spacing.

This way of applying formatting attributes is called *direct formatting*, in contrast to *style formatting*. Direct formatting has a number of disadvantages that are discussed in Chapter 9. For now, however, I'm sure you recognize that repeatedly applying the same sets of direct formatting to particular kinds of recurring text, such as headings, is a procedure both tedious and error-prone.

Instead of using direct formatting, you can use a style. In the current example you probably would want to use a heading style, such as Heading 1 if it's the top level of organization in your document. To apply this style to a heading, simply click in the heading and, with the Home ribbon displayed, click Heading 1 in the Quick Style Gallery, shown in Figure 4-1.

FIGURE 4-1

The Quick Style Gallery provides live-preview access to styles in the gallery.



Keyboard Shortcuts for Often-Used Styles

Word has built-in keyboard shortcuts for certain frequently used styles:

Normal	Ctrl+Shift+N
Heading 1	Ctrl+Alt+1
Heading 2	Ctrl+Alt+2
Heading 3	Ctrl+Alt+3

If the desired style is not displayed in the ribbon, you can scroll through the list of styles using the up and down triangles at the right of the Quick Style Gallery. Alternately, you can display more of the gallery at one time by using the drop-down arrow below the down triangle.

Note

If the style you want still isn't shown, you might need to jump ahead to Chapter 9, to the section on the Quick Style Gallery. ■

Types of Styles

There are two basic types of styles: character and paragraph. Character styles convey character-level formatting information and can be applied to any text selection in a document. If no text is selected, the character style will be applied to the current word (this is the default; to change the default, choose File ➪ Options ➪ Advanced ➪ Editing options, and turn off "When selecting, automatically select entire word").

Paragraph styles can be applied only to one or more whole paragraphs and affect the entire paragraph (although I'll later show you some sneaky techniques that enable you to seemingly sidestep this limitation). Because paragraph styles affect the entire paragraph, if you're applying a style to a single paragraph, you don't need to select it — just make sure that the insertion point is in the paragraph you want to style.

Although there are just two basic types of styles, there are three additional special cases that are sometimes treated as distinct style types: *linked* (character and paragraph together in the same style), *table*, and *list*. Even so, you really only need to know about the character/paragraph distinction to begin using styles effectively.

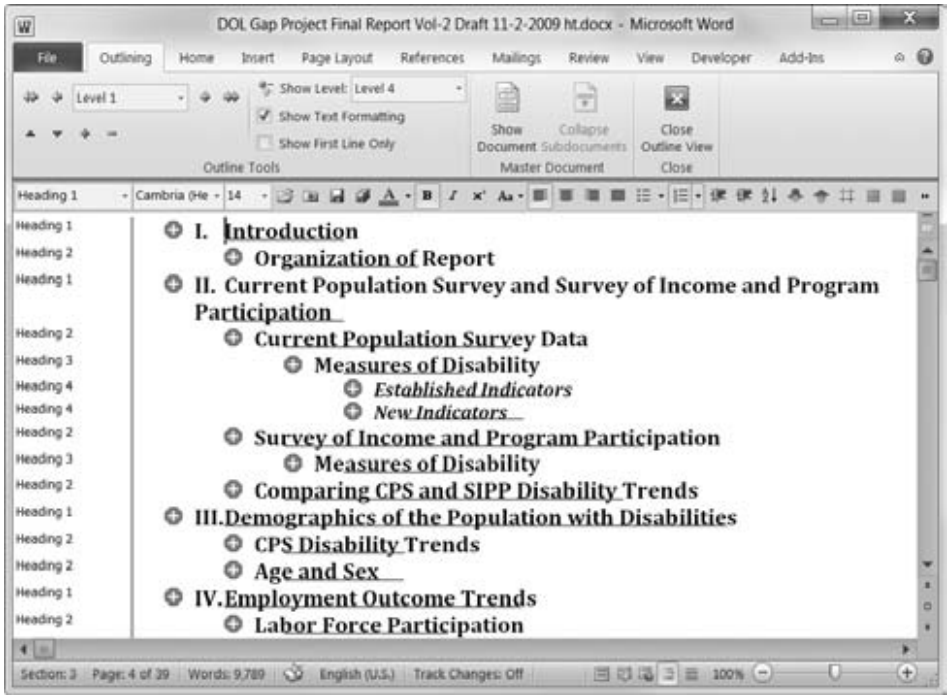
Outlining

Closely tied to the use of a particular set of styles is Word's outlining capability, long one of Word's strongest features. When you use Word's Heading 1 through Heading 9 styles in a document, you can use Word's Outlining mode to organize and reorganize your documents. Note that you don't need to use all nine levels. I typically use only three or four, sometimes as many as five or six, and very rarely all nine.

Figure 4-2 shows a document using Headings 1 through 4 for the levels of organizational hierarchy that were needed. Here the style area is shown at the left so you can see what styles are applied.

FIGURE 4-2

Outlining enables you to see an overview of your document's organization. The style area at the left reveals the applied Heading styles.



When displayed in Outlining view, lower-level headings are automatically indented so that the organization level is visually evident. Body text (non-heading text) can be suppressed so that you view only the overall organization.

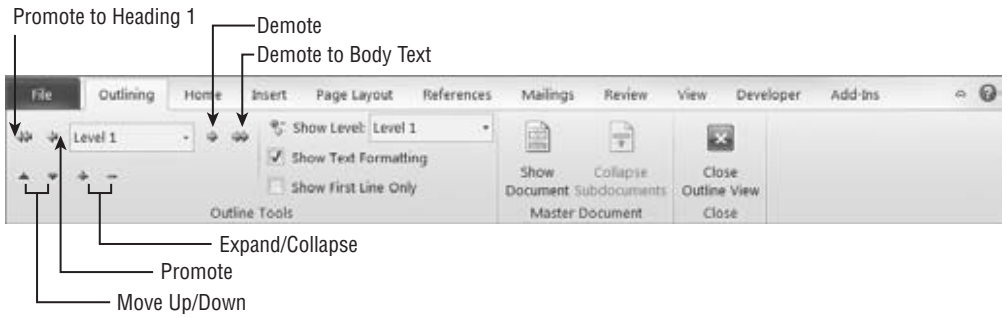
Using Outlining to Organize

Suppose, in reviewing this document, your boss decides that Chapters II and III should be reversed. Without benefit of Word's outlining mode, you would carefully select everything encompassed by Chapter II, cut it to the Clipboard, and then paste it after Chapter III.

In outlining mode, however, the task is much easier and less error-prone. Use the Show Level control, shown in Figure 4-3, so that no detail below Heading 1 is showing. In this case, you would select Level 1. Click anywhere in the Chapter II line, and click the move-down control, also shown in Figure 4-3. This moves Chapter II to below Chapter III, including all text and heading levels within Chapter II.

FIGURE 4-3

Outlining mode gives you tremendous organizational power.



If you're fond of keyboard shortcuts you can press Alt+Shift+Down, instead of clicking the move-down button. Alt+Shift+Up would move the level containing the insertion point up.

Using the Demote control (Alt+Shift+Right) reduces the organizational level of the current selection by one. For example, if the highest level in the selection is Level 2, then it is demoted to Level 3, and all collapsed levels below that are also demoted. Therefore, Level 3 becomes Level 4, Level 4 becomes Level 5, and so on. The Promote control (Alt+Shift+Left) works in precisely the opposite direction.

Situated between the Demote and Promote controls, the Level control is used to change the level of the selection as well. If you want to move something from, for example, Level 2 to Level 6, it might be easier to reset its level to 6 here, rather than demoting four times.

Note

Don't confuse the different level settings. The Show Level setting affects only what you see. The Level setting on the left, however, affects actual document contents. ■

The Expand and Collapse buttons are used to show additional detail contained within the currently selected level. If Show First Line Only is selected, you won't see all the text in that particular document section.

Custom Levels for Non-Heading Styles

Sometimes it can be useful to treat certain document styles, such as document titles, captions for tables, figures, and so on, as if they were heading levels in order to make them visible in Outline view. At the same time, you usually don't want to use the same styles you use for headings (except possibly for the document title when the document is to become part of a larger document). Word enables you to associate any style with any outline level.

For example, let's associate the Caption style with outline Level 9. Assuming that you're not already using Heading 9, this then provides a way for you, in Outline view, to see the location of anything using the Caption style.

To modify the Caption style, press Ctrl+Shift+S to display the Apply Styles task pane, and type **Caption**, but *do not press enter*. Pressing enter would assign the Caption style to the current selection (which is fine if a caption is selected, but it doesn't have to be in order for you to modify the Caption style). With "Caption" showing in the Style Name box, click Modify ➪ Format ➪ Paragraph ➪ Indents and Spacing tab. In the General section at the top, set Outline level: to 9 (or to any level at which seeing the locations of captions would be useful). Choose OK ➪ OK to close the open dialog boxes, and then dismiss the Apply Styles task pane.

Outlining versus Using the Navigation Pane Headings Browser

A similar tool is the Navigation Pane's headings browser — new in Word 2010. Unlike the Document Map feature in previous versions of Word, the headings browser can be used to reorganize or shuffle document contents in much the same way that outlining can be used. However — and I hesitate to say this lest it become an excuse *not* to use Heading styles — the headings browser does not *require* the use of Heading styles.

Without styles that contain organizational-level settings, however, hierarchical information is hard to keep track of when you're moving things around, and what you see in the headings browser pane won't necessarily indicate which headings are subordinate and which are superior. Hence, the headings browser is far from a perfect substitute for outline level styles.

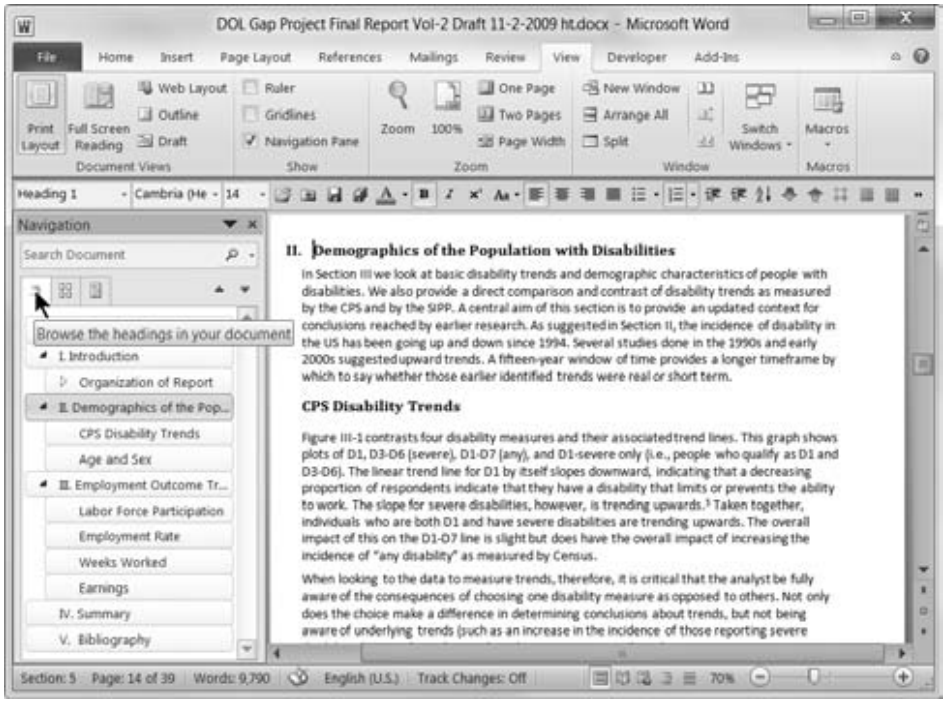
On the other hand, the headings browser is a great tool for seeing an overview of someone else's document and applying Heading styles to it. Like an X-ray machine, it can be used to diagnose and repair problematic formatting. Ah, yes. That's the ticket! Not *instead of* Heading styles, but as a route to proper formatting. Whew!

In any event, to display the Navigation Pane's headings browser, shown in Figure 4-4, click the Navigation Pane checkbox in the View ribbon tab, then click the first tab. A screen tip shows us that this will let you "Browse the headings in your document." The headings browser enables you to see your organization while your document remains in another view, such as Print Layout

or Draft view. For many users this is a lot more convenient than trying to work in Outline view, or having to shuffle two windows or a split view.

FIGURE 4-4

The headings browser provides an overview of your document, even if Heading level styles were not used.



Clicking a heading in the Navigation Pane switches the view in the document to that heading. Use the ▷ and ◢ buttons to expand and collapse levels displayed in the Navigation Pane.

Tip

Right-click in the Navigation Pane headings browser for a list of organizational display options. ■

Page Thumbnails, Too!

In Figure 4-4, notice the middle tab just below the Search Document box in the Navigation Pane. The middle pane displays page-thumbnail views of the document. This allows you to browse by page. Unlike the headings browser, however, the page browser is for viewing only — you cannot use it to move pages around.

AutoCorrect

Have you ever tried to intentionally type the lowercase letter *i*, only to have Word automatically change it to *I*? That's happened to me on more than one occasion. Yet, as annoying as that can be when I really want an *i*, I actually do like it when Word gets it right, and correctly changes *i* to *I*. (That passage was particularly hard to type!) If only Word could read my mind . . .

This automatic feature is called *AutoCorrect*. Word has hundreds of built-in autocorrections that correct everything from *abbout* (about) to *yoiu* (you). If your name is Yoiu Abbout you probably hate this feature, or at least want to turn it off!

Tip

This feature is much less accessible than it was in Word 2003. To make it more accessible, assign the AutoCorrect dialog box to a keystroke, or at least put it on the QAT. To put it on the QAT, right-click the QAT and choose Customize Quick Access Toolbar. Set "Choose commands from:" to All Commands, and click the second AutoCorrect Options . . . . item. Then click Add ➪ OK. Note that this gives you the AutoCorrect dialog box without any tabs. If you'd prefer to have the fully tabbed dialog box (which might mean that you'll sometimes have to click the AutoCorrect tab after the dialog box appears), use the first AutoCorrect . . . . tool instead of the second. (In Word 2007 this one was labeled AutoManager, but I guess someone at UI Central thought that two commands with the same name was somehow less confusing. Go figure.)

To assign a keystroke, in the File ➪ Options ➪ Customize Ribbon tab, click Customize. Set Categories to All Commands, and set Commands to ToolsAutoCorrect (for just the AutoCorrect tab), ToolAutoCorrectManager (for the AutoCorrect and Math AutoCorrect tabs), or ToolsAutoManager (for the fully tabbed dialog box). Click Press New Shortcut Key and then press the desired key combination. Finally, click Assign ➪ Close. ■

AutoCorrect Options

There are two aspects of AutoCorrect. The first is a set of options that affect Word's overall behavior in correcting five common "errors." That's in quotes because we don't always agree with Word that a particular occurrence is an error. These options can be turned on or off. Click File ➪ Options ➪ Proofing tab ➪ AutoCorrect Options to display the AutoCorrect dialog box shown in Figure 4-5.

Tip

Anytime AutoCorrect does something you didn't want done, you can immediately press Ctrl+Z to undo it. This includes the five general options as well as specific corrections under "Replace text as you type." ■

The first option, "Show AutoCorrect Options buttons," controls whether AutoCorrect options are displayed in a drop-down control when an autocorrection occurs. If you click the corrected word, the drop-down lets you change it back (the same effect as pressing Ctrl+Z) or stop correcting that particular item in the future. If having the button appear automatically disturbs you, you can turn it off.

FIGURE 4-5

For many Word users, this dialog box provides the cure for many headaches.



The rest of the options are self-explanatory. You'll need to decide if they help more than hurt. If they hurt only sometimes, click Exceptions to see if you can tame them not to correct things you want left alone.

Removing Built-In AutoCorrect Entries

For many of us, the "Replace text as you type" feature saves many hours of tedium. Becoming acquainted with Word's built-in list can save you some surprises. You'll also learn that in addition to correcting what you type, AutoCorrect provides a convenient set of shortcuts. Even so, there are some you probably can't live with.

To remove a built-in AutoCorrect entry, type in the Replace field the item you don't want corrected. Suppose, for example, that you prefer to decide for yourself when to and when not to accent certain letters, yet AutoCorrect insists on correcting *cafe* to *café*. Perhaps you're sending an e-mail telling someone to meet you at Tony Packo's Cafe on Monroe Street in Sylvania, Ohio. Go to its website (`www.tonypackos.com/locations.php`) and check it out. Its "cafe" does not contain an é. For that matter, neither does Hard Times Cafe.

Type **cafe** in the Replace field. In the list, the word café magically appears in the With column, but not in the With box. Click Delete. At this point, some users get confused because

clicking Delete causes café to appear in the With box. Make sure you don't accidentally click Add; otherwise, Word adds the correction again. Instead, click Close, or type another offensive AutoCorrect word in the Replace box and continue the purge. When you're done, you can celebrate with a bowl of Tony's chili and some apple strudel.

Rolling Your Own

In addition to zapping entries that give you indigestion, you can add your own. You aren't limited to correcting errors. You can create shortcut entries that automatically make your writing life easier. For example, I sometimes masquerade as an economist. We have some words and phrases that I don't like typing. For example, instead of typing **econometrically** when I need a juicy adverb, I type **ecly**, and it automatically changes to **econometrically**. When I type **ui**, it changes to **unemployment insurance**. Unfortunately, when writing computer books, I want it to change to **user interface**. I guess I need to change hats!

Note in Figure 4-5 that you have the option of inserting the replacement either as plain text or as formatted text. You can create plain-text entries directly from the dialog box. To create formatted text entries, however, you must first select the prospective "With" text in a Word document. For example, perhaps you have a long corporate name that always has to be bold, or suppose you have a table shell that you want to reuse in other documents, or a chart or logo image. Select the target item and then summon the AutoCorrect dialog box (File ➪ Options ➪ Proofing ➪ AutoCorrect Options).

Tip

Anytime you want Word's Options dialog box, you can save one keystroke by right-clicking the QAT and choosing Customize the Quick Access Toolbar. ■

As shown in Figure 4-6, when a selection contains formatting, Word automatically enables the Formatted text option. Type your shortcut (make sure it's not a real word) into the Replace box and click Add ➪ OK. Now, whenever you type your shortcut followed by any word separator (space, comma, period, semicolon, dash, etc.), it will automatically expand into your "With" text.

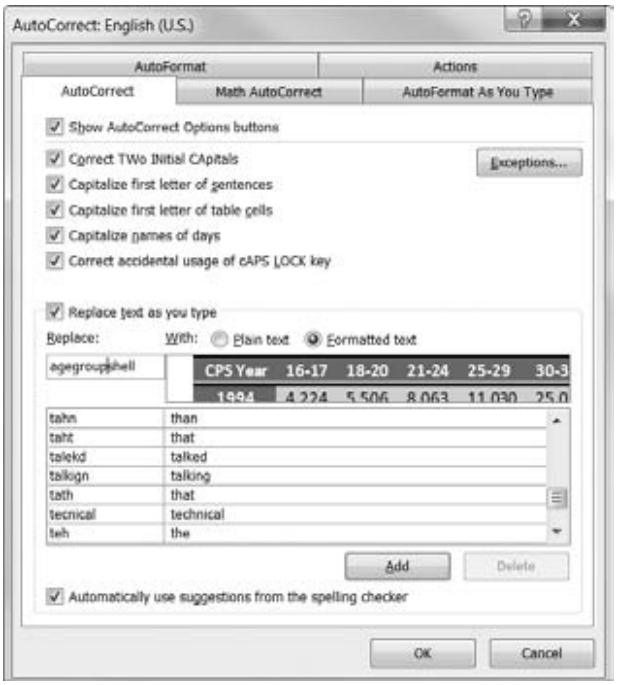
Tip

You can also add AutoCorrect entries on the fly, both for words you accidentally mistype and for abbreviations you type on purpose. If "Check spelling as you type" is enabled (File ➪ Options ➪ Proofing), a red zigzag line appears under misspelled words. Right-click the flagged word and click AutoCorrect. If the correct replacement is listed, clicking it will fix the misspelling and add the example to the AutoCorrect list. If not, you can click AutoCorrect Options and add your own correction.

For example, suppose you get tired of typing For example, all the time. Type fex, right-click it when it gets flagged, and choose AutoCorrect ➪ AutoCorrect Options. Type fex in the Replace box and for example in the With box, and then click Add, and then Close. If "Capitalize first letter of sentences" is selected, fex will yield the correctly capitalized correction whenever you type it. Otherwise, simply type Fex when you're beginning a sentence. ■

FIGURE 4-6

When selected text contains formatting that can't be fully displayed with plain text, AutoCorrect automatically selects the Formatted text option.



Top 10 Power User Tips

In this section I highlight the top 10 power techniques that have stood me in good stead over the years. Some of these are mentioned elsewhere in the book but only in passing, so it's possible that they have escaped your notice.

RedefineStyle

RedefineStyle is a built-in Word command that was introduced several versions ago. This command gives you a way to quickly enshrine direct formatting changes as part of the current style's definition.

For example, suppose you make a quick change to a Heading 1 style so that it has a negative indent of .25″. That's something you can do easily using the ruler. However, now you'd like to propagate that change to the style definition, not only the current paragraph. You apply Heading 1 to see what happens. Usually the text just gets reset to the default, undoing your formatting efforts. If you have Prompt to Update Styles enabled (in File ➪ Options ➪ Advanced ➪

Editing Options), you will be prompted as shown in Figure 4-7. Note, however, that even with Prompt to Update Styles enabled, you will never see this prompt when the style being modified is Normal!

FIGURE 4-7

You'll see this dialog box only if Prompt to Update Styles is enabled in Options ➪ Advanced ➪ Editing Options.



Usually users must resort to using the Modify Style dialog box (press Ctrl+Shift+S, and then click Modify) and making the change there — or some even more complicated method. These involve a number of steps, even if you're just making one simple change to the style definition.

With the RedefineStyle command assigned to a keystroke or to the QAT, it's just one simple action, and the current style is instantly redefined. Best of all, if you goof, Undo will fix it for you.

To assign this command to a keystroke, use File ➪ Options ➪ Customize Ribbon ➪ Customize. In Customize Keyboard, set Categories to All Commands, and set Commands to RedefineStyle (tap the R key to go to the first R command, and then scroll down to RedefineStyle). Pick a keystroke that's quick and handy (I use Ctrl+Shift+D, which is assigned by default to double underline, which I never use). Click in the "Press new shortcut key" box, press the keys you want to use, set Save Changes In to `Normal.dotm`, and then click Assign followed by Close.

To put RedefineStyle onto the QAT, look in the All Commands list for Redefine Style (with a space between the words). Highlight it and click Add.

Now, the next time you want to modify a style, make your changes using direct formatting techniques. When it looks the way you want it to look, click your Redefine Style QAT tool, or press your shortcut keystroke.

GoBack

GoBack, which is assigned to Shift+F5, cycles the cursor among the current insertion point (text cursor location) and the last three places in which editing occurred. If multiple documents are open and editing last occurred in a document that's not onscreen, Shift+F5 will take you there!

If only one file is open, and if it was just opened, then Shift+F5 will take you to the last place in which editing occurred the last time that file was opened. This can be a good way to find where you left off.

Paste Unformatted Keystroke

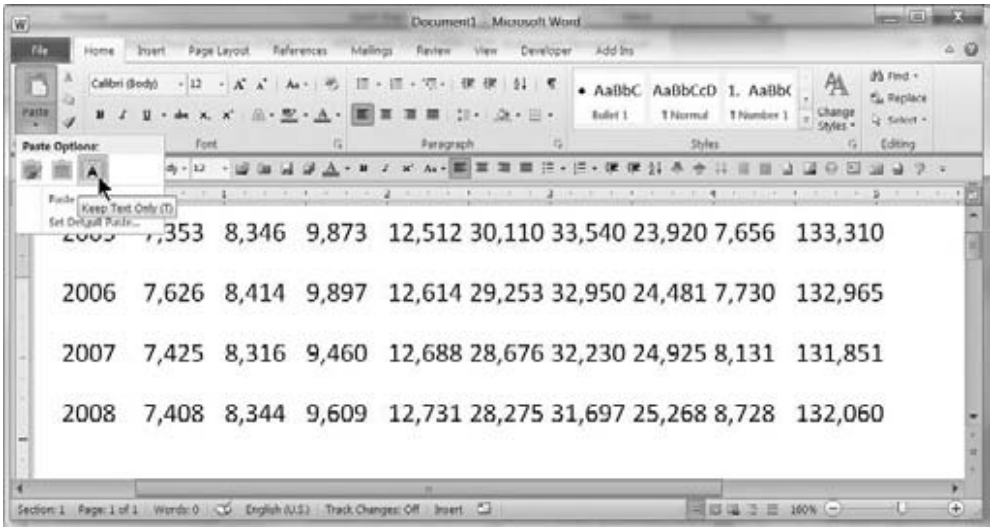
One of the most frequently used features in Word 2003 and earlier was Edit ➪ Paste Special ➪ Unformatted Text. When you copy text from a browser, another Word file, or some other source, you very often just want the text, and not the extraneous formatting (which might include odd bits of HTML) as well. The keystroke sequence was Alt, E, S, U, <Press Enter>, as indicated by the underlined characters in the user interface command names.

The good news is that thanks to Microsoft's implementation of legacy keystrokes, the old keystrokes work, even though there are no menus! That means that if you're used to AltESU<Enter>, it will still work for you.

Better news is that Microsoft realized that users use Paste Special ➪ Unformatted a lot, and so it added a new option in the Paste dropdown: Keep Text Only, shown in Figure 4-8. The Paste Options feature live preview, as well, showing what you'll get for each of the buttons under Paste Options.

FIGURE 4-8

Live preview shows the result of pasting a table as text.



The best news, however, is that in order to implement this feature Word 2010 now has a dedicated command! It's called PasteTextOnly. So pick a keystroke! Personally, I use Ctrl+Shift+V. Right-click the QAT and choose Customize the Ribbon ➪ Customize to access the Customize Keyboard dialog box. Set Categories to "All Commands," and set Commands to PasteTextOnly. Click in the "Press new shortcut key" box and press the desired key combination. Click Assign ➪ Close, and you're done.

Wrap to Fit

I don't like having to scroll horizontally to see what's on-screen. I keep Word zoomed way above 150% most of the time, so scrolling is a potential problem, but it's not — because of two settings I use for most of my writing.

First, I use Draft view whenever possible. To use Draft view click the Draft tool at the right end of the status bar or at the right end of the Document Views group in the View ribbon tab.

Second, I use Wrap to Fit. Choose File ➪ Options ➪Advanced ➪ "Show document content section," and click to enable "Show text wrapped within the document window." Note that this won't work in any of the *layout* views, because it doesn't accurately display document layout.

Apply Styles (Ctrl+Shift+S)

Apply Styles replaces the Formatting toolbar's Style tool (in Word 2003 and earlier) — sort of. As noted earlier, Apply Styles works differently, but at least it works.

When you want to change styles, press Ctrl+Shift+S, type the first few characters of the style name until it appears in the Style Name box, and press enter (you can also press the up or down arrow once you're in the neighborhood, if that gets you to the desired style more quickly). This way, your hands never have to leave the keyboard. You'll save at least four seconds every time you do this rather than futz around with the style tools on the ribbon. Over the course of a year this could actually add hours and days of free time you never had before. Time to write that novel! And look! It's so easy to apply different styles!

Default File Location(s)

If there's anything that rankles me, it's seeing each and every file that someone has ever created stored in the My Documents folder. First, I'm sure they don't all belong there. Second, it makes it really hard to find a needle in that huge haystack. And third, it's so easy to change, even if it's a bit harder to find out how than it was in Word 2003.

To change the default location to which files are stored in Word, choose File ➪ Options ➪ Save. Next to Default File Location, click Browse to navigate to a new and better location. Change this to where you want your Word documents to reside.

Note

Where did the rest of the File Location settings go? In the Advanced tab, just above Compatibility Options, click File Locations. There you'll find the familiar legacy File Locations dialog box from earlier versions of Word. ■

Play Favorites

The reason they're called Favorites is to encourage you to use them. The Favorites area in file-oriented dialog boxes is there to save you time. You're not limited to the ones that Microsoft put there.

Press Ctrl+O (File ➪ Open) in Word. The left side is called the Navigation Pane. At the top you should see Microsoft Word and below that Favorites. The Favorites area is pre-populated with some locations that Microsoft thinks might be useful to you. As you find yourself repeatedly navigating to particular locations, drag them into the Favorites area. If the name isn't sufficiently memorable or useful, click on it (once it's in the Favorites area), press F2, and rename it. The original location's name is unchanged.

Once a favorite outlives its usefulness, remove it. Right-click it and choose Remove. The original location is untouched. Only the shortcut to it is removed from the Favorites area.

Don't like the default arrangement? Then drag the shortcuts around so that they meet your needs.

They're *your* favorites. So make them your own, and make them work for you to save time and repetitive navigation.

AutoRecover and Backup Copies

Hate losing work? I do. That's why I keep a very short leash on AutoRecover. I also tell Word to always make a backup copy. At this point in my life I have more disk space than I have time to re-create lost work.

To set the AutoRecover interval, choose File ➪ Options and click the Save tab. Under "Save AutoRecover information every," choose an interval that reflects your work habits. If you're a fast worker you might want to set it to as little as every minute or two. For most users the default 10 minutes seems a bit too infrequent.

Note, however, that AutoRecover is not the same thing as automatic save. AutoRecover comes to the rescue only if Word crashes or you otherwise forget to save something. It does not automatically do a normal save of your document. Saving your document is up to you.

To enable backup copies, select File ➪ Options and click the Advanced tab. Under Save, enable Always Create Backup Copy.

Even with both of these settings enabled, I still do frequent saves — every time I press the enter key and certainly every time the phone rings. It's extremely frustrating to see Word crash while you're on the telephone. I have been known to utter some rather colorful comments on such occasions.

The good news is that Word 2010 now provides more direct access to automatically saved versions of files (`.asd` files). When you choose File ➪ Info, the Manage Versions section

provides access to all `.asd` (autosaved) files. If there are autosaved versions of the currently opened file, they will be listed here. To access autosaved versions of other files, choose Manage Versions ➪ Recover Draft Versions.

By default, this displays the Open dialog box and shows all `.asd` files in `C:\Users\[user]\AppData\Local\Microsoft\Office\DraftFiles`. Note that this is not the same location as the autorecover location set in File ➪ Options ➪ Advanced ➪ File Locations. Instead, this is where Word moves user-unsaved files left over from previous Word sessions. According to Word's Help file, they are kept for "several days," and serve as one of several last ditches when you think something you worked on is hopelessly lost.

Don't Edit on Removable Media

Speaking of hopelessly lost, one of the most common causes of corrupted documents in Microsoft Word is removable media. Because of the way Word creates and uses temporary files, many of those working files end up in the same folder in which the original file is being edited. As you edit, temporary files are constantly being opened. In some cases they can be many times larger than the original file. This makes it exceedingly easy for removable media to fill up. Once Word runs out of space, you can kiss your file goodbye. Fortunately for many users, most modern computers no longer support floppy diskettes, which removes at least one source of temptation to data disaster. But, USB drives, SD cards, CF cards, etc. have stepped in to fill the temptation void.

Another corruption scenario occurs when removable media is removed while Word still has the file open. And by "open," I mean that quite literally. Word often separates the file into different pieces to make editing more efficient from a programming standpoint. Usually Word doesn't reassemble the file until it has been fully closed. A recent Save isn't sufficient. If you remove the media — which can be a thumb drive, a USB drive of some other kind, etc. — before the file closed, pucker up and kiss the file goodbye.

Something similar can happen, although this is less common, if a file being edited resides on a server and you lose connection with the server before the file is properly closed. Think of the server as you think of removable media.

So, if you shouldn't edit directly on removable media, what should you do? Use Windows Explorer to copy the file to your own local hard drive. Edit it there, save it, and close it. Then use Windows Explorer to copy the changed file back to the location or disk where you want it.

You can further protect yourself by telling Word to copy remote files to your computer when they are stored on a server. In File ➪ Options ➪ Advanced and in the Save section, click to enable "Copy remotely stored files onto your computer, and update the remove file when saving."

Open and Repair

Did you know that Word has an Open and Repair command? A lot of people overlook the existence of this option, but in each of the past few releases of Word it's gotten better.

Whenever Word is unable to open a file the normal way, Open and Repair might be your best hope of recovering as much as possible to avoid losing difficult-to-redo editing. When you encounter a file that Word says it can't open, press Ctrl+O and select the file. Rather than click Open, click the drop-down arrow next to the Open button, and choose Open and Repair. In recent Word versions, this has been fixing more and more documents (although it's not a miracle worker).

Last Ditch Salvage

If Open and Repair fails, your last resort might be to attempt to use Recover Text from Any File, which you access by setting Files of Type to "Recover Text from Any File" in the Open dialog box. Note, however, that this recovery feature should not be used on files saved in any of Word's new `.docx` or `.docm` formats. That's because those files are actually compressed ZIP files, and you will not recover any useful text from them. Instead, rename the damaged file so that it has a `.zip` extension. Then, open the ZIP file and look for a folder named Word. Inside that folder there should be a file named `document.xml` (yes, `document.xml` is the actual filename). That file will contain the text of your document amid a lot of XML commands.

Summary

In this chapter you've learned about some of Word's most useful and important power features and tools. You should now be familiar with them and ready to start using them to enhance and simplify your work with Word documents. Among other things, you should now know the following:

- Why using styles can save you time and work and ensure a more professional and refined look for your documents
- How to effectively use outlining and the Navigation Pane's headings browser to organize and reorganize your document
- How to tame AutoCorrect annoyances as well as add your own AutoCorrect shortcuts to reduce tedium and improve your productivity
- How to use power techniques to make Word easier, faster, and more powerful for everyday word processing

CHAPTER 5

The X Files: Understanding and Using Word's New File Format

Word 2003's file format was basically unchanged since Word 97. Feature enhancements necessitated the modification of Word's binary format over the years, such as when document versioning and floating tables were introduced.

Even so, you can still open most Word 2003 files in Word 97 and the documents will look basically the same. Only if you use newer features will you see a difference, and usually that just means reduced functionality rather than lost data or formatting.

Word 2010, Word 2007, and Word 2003 users will continue to see interoperability. However, Word 2010's and 2007's "native" format is radically different — and better — than the old format. The new format boasts a number of improvements over the older format:

- **Open format:** The basic file is in ZIP format, an open standard, which serves as a container for `.docx` and `.docm` files. Additionally, many (but not all) components are in XML format (eXtensible Markup Language). Microsoft makes the full specifications available free, and they may be used by anyone royalty-free. In time, this should improve and expand interoperability with products from software publishers other than Microsoft.
- **Compression:** The ZIP format is compressed, resulting in files that are much smaller. Additionally, Word's "binary" format has been mostly abandoned (some components, such as VBA macros, are still written in binary format), resulting in files that ultimately resolve to plain text, and that are much smaller.
- **Robustness:** ZIP and XML are industry-standard formats with precise specifications that offer fewer opportunities to introduce document corruption. Hence, the frequency of corrupted Word files should be greatly reduced.

IN THIS CHAPTER

Word's "XML"-based documents

Stick with .doc or upgrade to .docx?

Letting your associates know about the Microsoft Office Compatibility Pack

Converting from .docx to .docm

Inside the .docx file

- **Backward-compatibility:** While Word 2010 and 2007 have a different format, they still fully support the opening and saving of files in legacy formats. A user can opt to save all documents in an earlier format by default. Moreover, Microsoft makes available a *Compatibility Pack* that enables Word 2000–2003 users to open and save in the new format. In fact, Word 2000–2003 users can make the `.docx` format their default, providing considerable interoperability among users of the different versions.
- **Extensions:** Word 2010 has four native file formats: `.docx` (ordinary documents), `.docm` (macro-enabled documents), `.dotx` (templates that cannot contain macros), and `.dotm` (templates that are macro-enabled, such as `Normal.dotm`).

Calling the x-file format "XML format" actually is a bit of a misnomer. XML is at the heart of Word's x format; however, the files saved by Word are not XML files. You can verify this by trying to open one using Internet Explorer. What you see is decidedly not XML. Some of the components of Word's x files, however, *do* use XML format.

Compatibility with Previous Versions of Word

As indicated, Word 2010 and 2000–2003 users will still be able to read and write to each others' files, assuming that the Word 2000–2003 users install the free Office Compatibility Pack. Even so, Word will sometimes warn you that features might be lost when you convert to a different format.

Word itself runs an automatic compatibility check when you attempt to save a document in a format that's different from the current one. You can, without attempting to save, run this check yourself at any time from Word 2010. To see whether features might be lost in the move from one version of Word to another, open the document in Word 2010. Choose File ➪ Info ➪ Check for Issues ➪ Check Compatibility.

For the most part Word 2010 does a good job of checking compatibility when trying to save a native `.docx` file in `.doc` format. For example, if you run the compatibility checker on a Word 2010 document containing advanced features, you will be alerted, as shown in Figure 5-1.

When moving in the other direction — checking a Word 2003 (or earlier) document for compatibility with Word 2010 — the checker usually will inform you that "No compatibility issues were found." Note however, that the Compatibility Checker doesn't check when you first open a document formatted for Word 2003 (or earlier). Nor does it check when you convert a file. It's not until you try to save the file that it warns you, as shown in Figure 5-2.

Caution

The Compatibility Checker does not warn you if you open a file that uses Word's versioning feature. Word 2010 does come with a tool for dealing with multiple document versions that were saved in a single file, but Word will not alert you to the fact that the current file contains versioned changes until or unless you try to save the file in `.docx` format. Note also that Word 2010 itself cannot fully access or properly save a versioned file, even if you tell Word 2010 to work in Word 2003 format. Hence, if you save such a file in Word 2010 — even if you tell it to save it in Word 2003 format — all versioning information will be lost! ■

FIGURE 5-1

Using the Compatibility Checker to determine whether converting to a different Word version will cause a loss of information or features.



FIGURE 5-2

Word 2010 warns you when saving a document that contains multiple versions saved in Word 2003 or earlier.



To .doc or Not to .doc

If you have the option to use Word's old format, rather than the new format, why shouldn't you do that? Isn't old usually more reliable and better tested than new? Well, that's certainly a plausible argument, but consider the fragility of Word's binary `.doc` format. Have you ever experienced document corruption? With a proprietary binary file format, the larger and more

complex the document, the more likely corruption becomes. It doesn't take much for a Word file to become inaccessible to Word's default Open command.

Another issue is document size. Consider a simple Word document that contains just the phrase "Hello, Word." When saved in Word 97–2003 format, that basic file is 26K. That is to say, to store those 11 characters it takes Word about 26,000 characters!

The same phrase stored in Word 2010's `.docx` format requires just 10K. Make no mistake: that's still a lot of storage space for just those 11 characters, but it's a lot less than what's required by Word 2003. The storage savings you get won't always be that dramatically different, but over time you will notice a difference. Smaller files mean not only lower storage requirements but faster communication times as well.

Still another issue is interoperability. When a Word user gives a `.doc` file to a WordPerfect or other word processor user, it's a very sure bet that something is going to get lost in translation, even though WordPerfect claims to be able to work with Word's `.doc` format. Such documents seldom look identical or print identically, and the larger and more complex they are, the more different they look.

With Word's adoption of an open formatting standard, it is possible for WordPerfect and other programs to more correctly interpret how any given `.docx` file should be displayed. Just as the same web page looks and prints nearly identically when viewed in different web browsers, a Word `.docx` file should look and print nearly identically regardless of which program you use to open it (assuming it supports Word's `.docx` format).

Persistent Save As

If, despite the advantages of using the new format, you choose to use Word's `.doc` format, you can do so. Choose File ➪ Options ➪ Save tab. As shown in Figure 5-3, set "Save files in this format" to "Word 97–2003 Document (*.doc)."

Note that even if you set `.doc` or some other format as your default you can still override that setting at any time by using Save As and saving to `.docx` or any other supported format. Setting one format as the default does not lock you out of using other formats as needed.

Microsoft Office Compatibility Pack

As noted earlier, Microsoft makes available a free enhancement that enables Word 2003 users to open and save files in the new format. In fact, this enhancement also works with Word 2002.

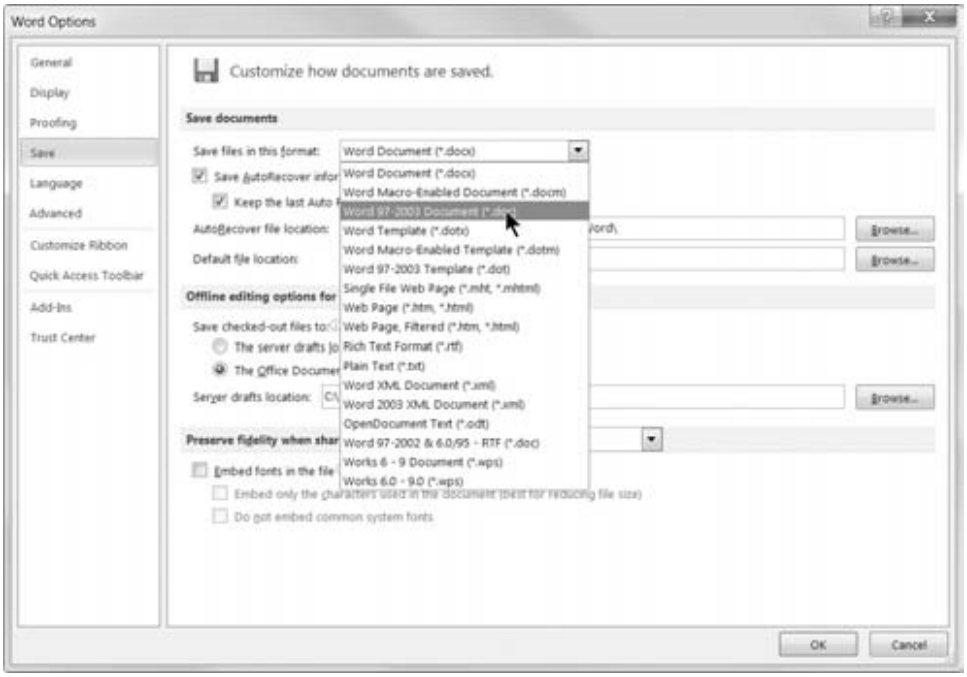
Instructions for downloading and installing the converters are in flux, as is the location of the Compatibility Pack. Try the following search in Google:

```
site:microsoft.com "office compatibility pack"
```

At this time, the first hit listed is the correct location.

FIGURE 5-3

You can tell Word to save in any of a variety of formats by default.



.docx Versus .docm

With Word 2010 come four XML-based file formats:

- `.docx`: An ordinary document containing no macros
- `.docm`: A document that either contains macros or is macro-enabled
- `.dotx`: A template that does not contain macros
- `.dotm`: A template that either contains macros or is macro-enabled

It is important for some purposes for users to be able to include macros not just in document templates, but in documents as well. This makes documents that contain automation a lot more portable. Rather than having to send both document and template — or, worse, a template masquerading as a document — you can send a document that has macros enabled.

Note

When Word macro viruses first started appearing, ordinary Word documents could not contain macros — only templates could. Therefore, one of the most popular ways of "packaging" macro viruses was in a `.dot` file that had been renamed with a `.doc` extension. The virus itself often was an automatic

macro (typically AutoExec) that performed some combination of destruction and propagation when the rogue .dot file was first opened. A common precaution was to press Shift as you opened any Word file — .doc or .dot — to prevent automatic macros from running. In fact, even with various advances in security and antivirus software, pressing Shift when you open an unfamiliar Word document is still not being overcautious. In recent versions of Word, .doc files can legitimately contain macros, so I'm not really sure the situation has improved much. I still reach for the Shift key, do a quick inspection to determine whether any macros are hiding inside, and then proceed. Often, though, Word 2010 will warn you when a document contains macros. ■

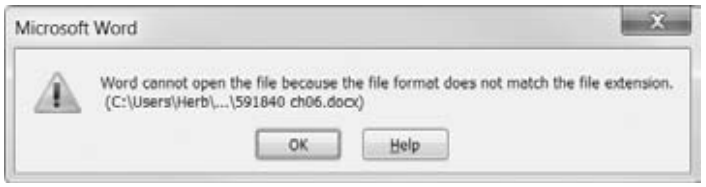
Because Word 2003 documents can contain legitimate macros, there is no outward way to know whether any given .doc document file contains macros. If someone sends you a .doc file, is opening it safe?

While it's not clear that the new approach — distinct file extensions for documents and templates that are macro-enabled — is going to improve safety a lot, it does provide more information for the user. This is true especially in business environments, where people don't deliberately change file extensions. If you see a file with a .docm or .dotm extension, you know that it contains macros, and that it might warrant careful handling.

Moreover, if a document file has been deliberately mis-renamed, Word will refuse to open it. Whether it's a .docx file that's been renamed to .docm or vice versa, you will see the message box shown in Figure 5-4.

FIGURE 5-4

Word 2010 refuses to open a .docx or .docm file that has deliberately been mis-renamed.



Converting a .docx File into a .docm File

If you want to convert a .docx file so that it can contain macros, you must use Save As and choose "Word macro-enabled document (*.docm)" as the file type. You can do this at any time — it doesn't have to be when the document is first created. You can also remove any macros from a .docm file by saving it as a Word document (*.docx).

Even so, you can create or record a macro while editing a .docx file, and even tell Word to store it in a .docx file. There will be no error message, and the macro will be available for running in the current session. However, when you first try to save the file, you will be prompted to change the target format or risk losing the VBA project. If you save the file as a .docx anyway and close the file, the macro will not be saved.

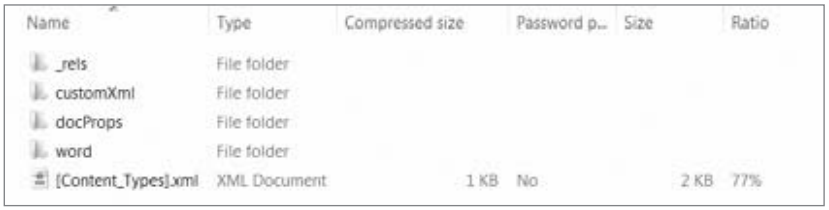
Understanding .docx

As indicated earlier, Word's new `.docx` format doesn't itself use XML format. Rather, the main body of your document is stored in XML format, but that file isn't stored directly on disk. Instead, it's stored inside a ZIP file, which gets a `.docx`, `.docm`, `.dotm`, or `.dotx` file extension.

To verify this, create a simple Word 2010 file, and save and close it. Next, rename it to add a `.zip` extension. Finally, use Windows Explorer to display the contents of that ZIP file, as shown in Figure 5-5.

FIGURE 5-5

When viewed as ZIP files, most `.docx` files contain three main folders and a Content Types XML document.



Word `.docx` files can contain additional folders as well, such as one named `customXml`. This folder is used if the document contains content control features that are linked to document properties, an external database or forms server, etc.

The main parts of the Word document are inside the folder named `word`. A typical `word` folder for a simple document is shown in Figure 5-6.

The main text of the document is stored in `document.xml`. Using an XML editor you could actually make changes to the text in `document.xml`, replace the original file with the changed one, rename the file so that it has a `.docx` extension instead of `.zip`, and open the file in Word, and those changes would appear.

Quick Q & A

Q: What's an XML editor? When I double-click an XML file, it just opens Internet Explorer, which doesn't let me edit anything.

A. There are specialized XML editors. You can also use Expression Web or SharePoint Designer. You can also use anything that edits plain-text files, such as Notepad.

More complex Word files contain additional elements. Shown in Figure 5-7 is an expanded folder view of a `.docx` file that contains clip art, an embedded Excel chart, several pictures, and some SmartArt, as well as custom XML links to document properties.

Tip

You can replace the images in a `.docx` file without editing the file in Word. Rename the `.docx` file so that it has a `.zip` extension. Extract the images stored in the `word\media` folder so you can see what's what. Give the replacement images the same respective names as the existing ones. Replace the contents of the `word\media` folder with the new images. Finally, replace the `.zip` extension with the original extension. Presto! And you never touched Word! This might not make ergonomic sense for just a few images, but if you have dozens it could save you a substantial amount of time. ■

FIGURE 5-6

The Word document's main components are stored inside the .docx file in the folder named `word`.

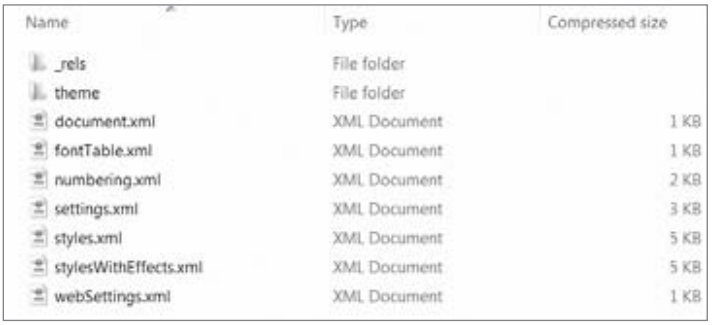
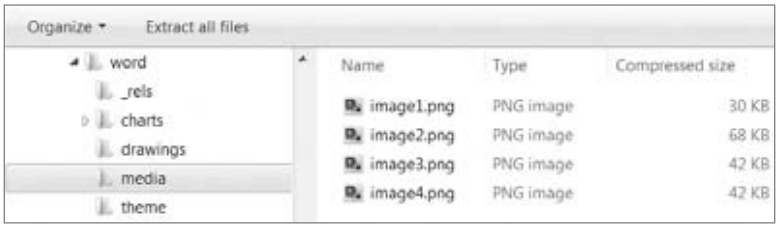


FIGURE 5-7

In a .docx file, images are stored in the word\media folder.



Summary

In this chapter you've learned about the advantages of Word's new `.docx` and `.docm` file formats:

- Increased openness
- More compact file size
- More robustness and resistance to document corruption
- ZIP format provides additional ways to access and maintain document content
- Backward-compatibility with the previous format
- Free Compatibility Pack for Word 2002 and 2003 users
- Ability to modify Word 2010 files without using Word

CHAPTER 6

Make It Stop! Cures and Treatments for Word's Top Annoyances

When it comes to word processing, many of us agree that Microsoft Word really is the only game in town. Oh, sure, there's WordPerfect and a few others, but for most of us, jobs and other organizations require that we spend a fair amount of time using and getting used to Microsoft Word.

It's like air. We don't choose to breathe it. We breathe it because we have to. And, like air, it sometimes smells bad. So, sometimes, we hold our breaths. But, what if you could get rid of some of the bad smells?

Okay. I'm going to stop right there. Some analogies deserve to be headed off at the pass, and this is one of them.

This chapter details a number of annoying things that prevent many users from enjoying and using Word as the makers intended. Some are defaults; some get turned on by accident. Some require you to dig a little deeper to find out what makes Word tick. What the annoyances covered in this chapter have in common, however, is that they can be tamed or turned off. If some things about Word are giving you a headache, this chapter is your analgesic. If they don't solve your particular illness, perhaps they can inspire you to determine whether a palliative exists.

In this chapter we'll be visiting the Word Options control center repeatedly. You get there by clicking the File tab and then clicking Options near the bottom. Not exactly an ergonomic poster child, eh? To make OfficeCenter faster and easier to get to, I suggest that you add it to your QAT (Quick Access Toolbar) and/or assign it a keystroke. Personally, I use F11 because I've never had much use for its default assignment of Next Field.

IN THIS CHAPTER

Eliminating the dreaded drawing canvas

Overcoming editing annoyances

Making view annoyances vanish

Teaching Word to look for Help locally

Conquering the activation blues

Learning where all those automatic things are coming from

Tip

Here's a neat little trick that saves you from the agony of having to deal with the long lists of categories and commands in the Customize Keyboard dialog box. Hold down Ctrl+Alt and press the + sign on the number pad. The mouse pointer should turn into a cloverleaf. Use that cloverleaf to right-click the QAT and choose Customize Quick Access Toolbar. The Customize Keyboard dialog box appears, with the OfficeCenter command already selected! Click in Press new shortcut key and tap the keystroke(s) you want to use. Click Assign ➪ Close, and you're done.

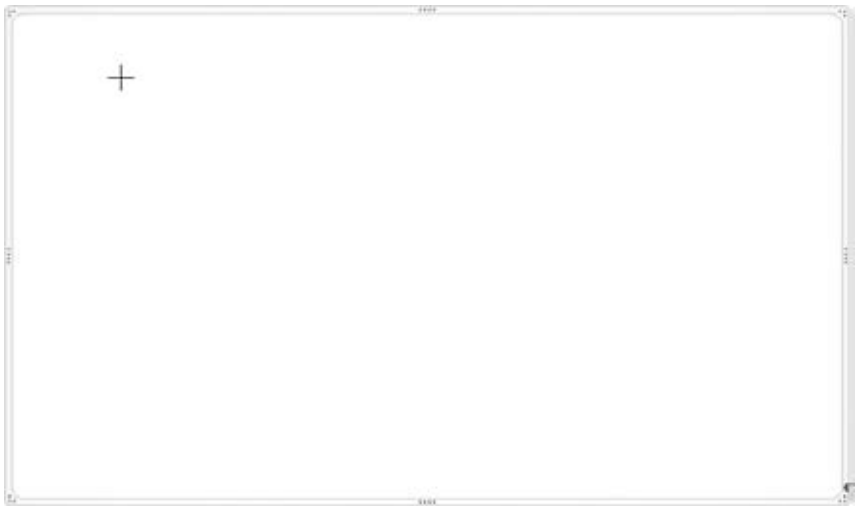
If you prefer a QAT button, right-click the QAT and choose Customize Quick Access Toolbar. Set "Choose commands from" to "All commands." Tap the P key to accelerate to the p's. Just above Organization Chart, click the second of the two Options commands (the first is printing options). With Options selected, click Add ➪ OK. ■

Drawing Canvas

If you've been using Word for a while now, you might have encountered the view shown in Figure 6-1 — only there's something missing. This is the drawing canvas. In earlier versions of Word, however, you would also see "Create your drawing here" inside the canvas. That gave you a hint as to what to look for when you decided to try to turn it off.

FIGURE 6-1

If you upgraded from a previous version, Word 2010 might still default to using the drawing canvas.



When the drawing canvas was introduced, the idea was to clarify to the user that drawing objects aren't in the same layer as the text. It ended up, however, getting in the way and confusing users.

In Word 2010 the drawing canvas is not used by default, but if you're one of the few users who actually got used to it and want it back, you can have it back. If you're one of the many users who never found out how to get rid of it, and it's back in full force in Word 2010 simply because setup kept your old settings, you can get rid of it. Either way, somebody's going to be happy!

To make the canvas stop appearing (or to make it appear), in Word Options, click Advanced. In the Editing Options section, click "Automatically create drawing canvas when inserting AutoShapes" to add or remove the check mark.

Editing Annoyances

Word has a gaggle of editing options. I have definite opinions about these, but I've come to understand that in the broader Word user community, it's more of a love/hate relationship. What some users hate, others love, and vice versa. As the old Burger King commercial promised, you (usually) can "Have it your way."

Insert/Overtype

Right-click the status bar at the bottom of the Word screen and ensure that Overtype has a check mark by it. Dismiss the Customize Status Bar screen so that you're back in a document window. Observe the status bar and press the Insert key. Does anything happen?

By default, nothing happens. That's because Microsoft got really tired of people calling and complaining because old text was disappearing when new text was typed. Rather than just settle for the explanation that an evil demon had taken possession of their computers, these users wanted to know what was going on. As a society, we much prefer to dumb down the product rather than smarten up the user.

Therefore, the former default assignment of the Insert key to toggling Insert/Overtype was removed. Users who are already smart can put it back. But heaven forbid that neophytes actually learn about this useful feature.

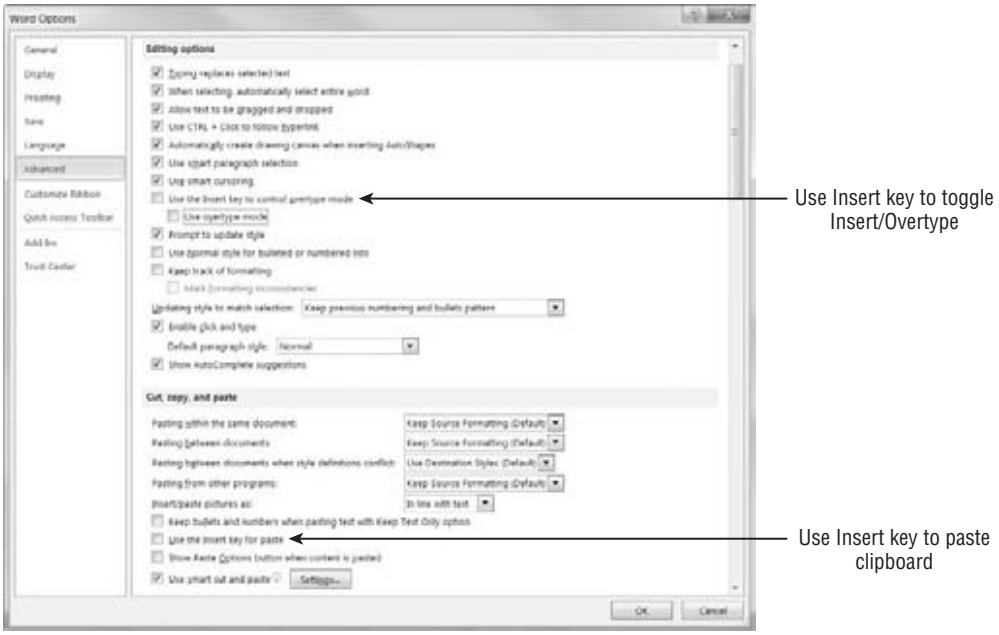
In any case, you have four options:

- Leave it unassigned (or decommission it if Word inherited an earlier setting when you upgraded to Word 2010). For some, it's too easy to press by accident, thereby producing unintended results that might take you a while to notice.
- Use Word Options to assign it to toggling Insert/Overtype, which is what it does in most Windows programs, and is what it did during Word's "middle" years.
- Use Word Options to assign it to Paste, which is what it did in the very early years of Word for DOS.
- Use Customize Keyboard to assign it to something else.

If you want any of the first three options, select File ➪ Options ➪ Advanced tab, look at Editing Options, and cut, copy, and paste. As shown in Figure 6-2, check or uncheck the boxes shown to reflect your preference. Remove both checks to leave Insert unassigned.

FIGURE 6-2

Leave both checkboxes blank to render the Insert key inert.



To assign Insert to something else, visit File ➪ Options ➪ Customize Ribbon ➪ Customize. Or, if you want to assign the Insert key to something that's already available in a ribbon or the QAT, use the Ctrl+Alt+[plus sign] tip shown earlier in this chapter.

Typing Replaces Selected Text

In most Windows programs, when you select text and begin typing, the selected text is replaced by the new text you type. Go ahead. Try it in Notepad, in any Word textbox, or in any textbox in a Windows program. Like the weather forecast, you can rely on it. Okay, well, not like the weather forecast.

Note that I'm not talking about Overtype. That's something different, and is controlled by the Insert/Overtype toggle that you can display on the status bar or assign to the Insert key.

Word has a different mode of editing, however, that is an available option. When text is selected and you type new text, the selection isn't deleted. Instead, it is unselected and shoved to the right.

If you find that you often accidentally delete text you've selected, you might want to deliberately turn off "Typing replaces selected text." More often, however, users mistake this feature for Insert/Overtype, and turn it off assuming that they're turning Overtype off. Then, when Overtype doesn't stop, users completely forget about the setting changes they made (as they flail around looking for the correct solution to the original problem). Later, when they notice the new problem, they've completely forgotten about the "Typing replaces selected text" setting.

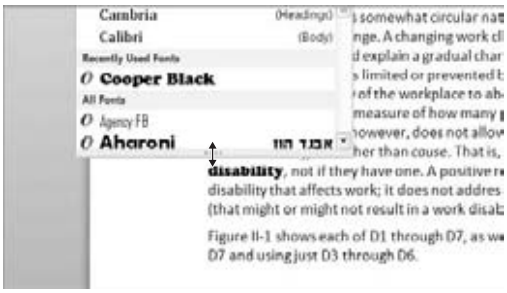
To turn this option on or off on purpose, in Word Options, click the Advanced tab. Look for "Typing replaces selected text" in the Editing Options section.

Formatting Control Covers Up Live Preview Area

One of Word 2010's claims to fame is live preview. I like it. Some people will hate it. Others will sort of like it, but find that it sometimes gets in the way. Clearly, if the Font gallery were extended to its normal length, you would never be able to see a live preview of the selected section of the document shown in Figure 6-3. Use the dotted control to drag the gallery out of the way. If the drag dots are on the right corner, you can make the gallery narrower as well as shorter.

FIGURE 6-3

The dots at the bottom of a gallery control indicate that it can be dragged up to expose more of the document for live preview.



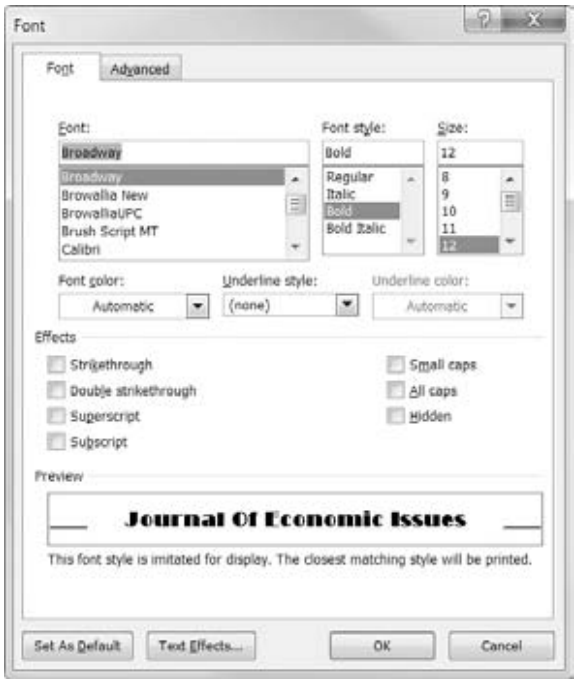
If you absolutely hate live preview, turn it off. In File ➪ Options ➪ General, remove the check next to Enable Live Preview. Now you'll never be bothered by it or annoyed that a gallery is covering something up. If you still want a font preview, you can use the Font dialog box instead of the Font gallery. Its Preview box shows you how the selected text will appear with the highlighted font applied, as shown in Figure 6-4.

Prompt to Update Style

When you attempt to reapply the current style to a selection, you might intend for either of two things to happen. You might want to revert to the original and unmodified style formatting. (If so, there's an easier and surer way.) Or you might be trying to get Word to update the style definition.

FIGURE 6-4

Some of Word's legacy dialog boxes provide formatting previews.



If you accidentally or experimentally modify formatting using direct formatting techniques and want to revert to the style's settings, there's an easier way than reapplying the current style. If you've modified paragraph formatting, use Ctrl+Q, which is assigned to the ResetPara command. If you've modified character formatting, use Ctrl+Space, which is assigned to ResetChar.

On the other hand, if you like to be prompted about what to do, *a la* Word 2003 (and earlier), you can tell Word to prompt you. In Word Options ➪ Advanced, under Editing Options, click to enable Prompt to Update Style. It's turned off by default. Or, if it somehow was turned on, you can turn it off. When enabled, it will display the prompt shown in Figure 6-5 when you reapply the current style.

If instead you want Word to automatically update the current style as you make changes to it, that's possible, too. Click to enable that option, shown deselected in Figure 6-5.

Or, if you're having a hard time making that dialog box appear, you can put the larger Modify Style dialog box into service. Press Ctrl+Shift+S to display the Apply Styles task pane. Once there, click Modify, which displays the Modify Style dialog box shown in Figure 6-6. Click to enable Automatically Update. Note that you can apply this option just to the current document or to all documents based on the same template.

FIGURE 6-5

You'll see this dialog box only if Prompt to Update Style is enabled. Note that you can choose to have word ''Automatically update the style from now on.''

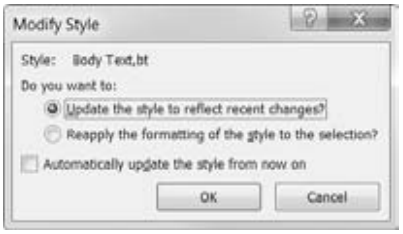
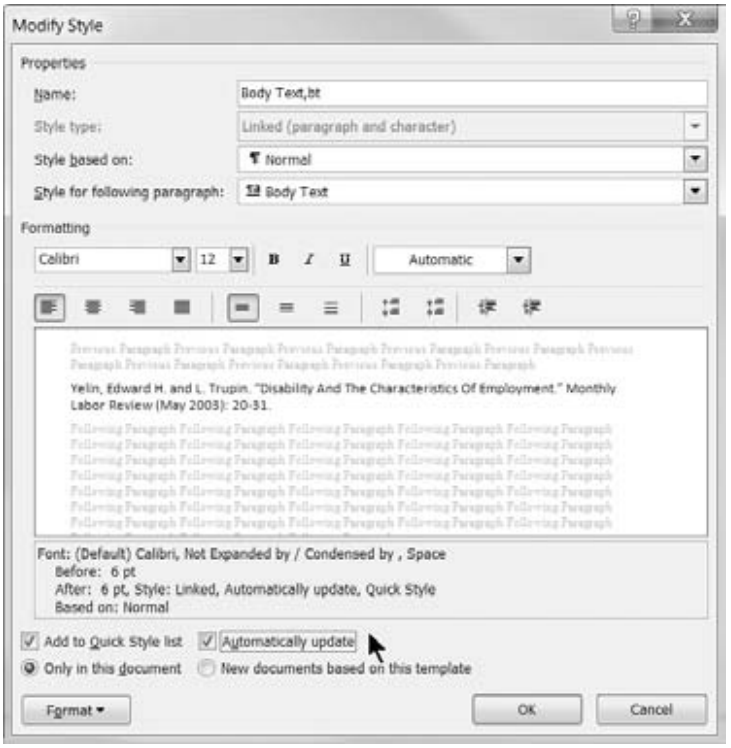


FIGURE 6-6

If you choose ''Automatically update,'' Word automatically redefines the current style when you make direct formatting changes.



Note

Note that when it comes to the Normal style, Word plays by different rules. Because so many styles ultimately are based on Normal, Word will not display the dialog box shown in Figure 6-5 if the current style is Normal. Moreover, it does not provide the ''Automatically update'' option shown in Figure 6-6 either. ■

Mouse Selection

Have you ever tried to use the mouse to select everything in a paragraph except for the paragraph mark? Perhaps you want to replace what's typed, but want to keep the current paragraph formatting and style. But when you use the mouse to try to leave the paragraph mark unselected, Word jumps right over that last character and grabs the paragraph mark as well.

It doesn't have to be that way. To make it stop, in Word Options, select the Advanced tab. In the Editing Options section, remove the check next to "Use smart paragraph selection." That's it.

You can also buy a laser mouse. It turns out that this feature assumes that the mouse pointer cannot move in very tiny increments. With some of the new mice, it is possible to omit the paragraph mark even when Smart Paragraph Selection is turned on. Even so, it's a lot easier to select it than it is to omit it. Still, this gives you another option if you sometimes like the feature, but sometimes don't. Just make sure your hands aren't jittery from too much caffeine.

Tip

If you don't want to invest in a laser mouse or give up caffeine, but still only sometimes want a workaround, use Shift+Left to nudge the selection one character to the left after selecting with the mouse. Smart Paragraph Selection applies only to selection using the mouse. ■

Cut and Paste Sentence and Word Behavior

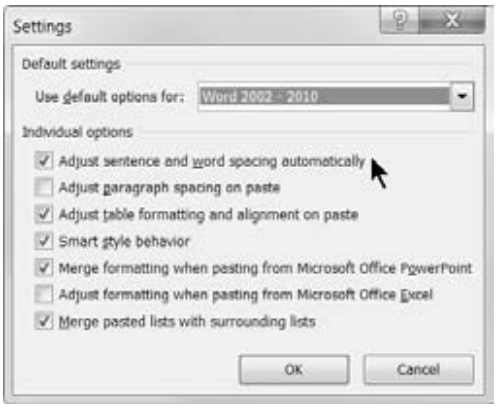
When you cut and paste text, Word can be dumb, smart, or too smart. Intelligence, like beauty, however, sometimes is in the eye of the beholder. What's too smart for you might be perfect for someone else. Hey, maybe that's why they're called options.

Have you ever copied a sentence and then pasted it at the end of another sentence and ended up with no space between the period and the beginning of the pasted sentence, and too much space at the end? Smart Cut and Paste was designed a few Word versions ago to deal with this problem. If you're accustomed to compensating for it, Word's automatic behavior can be a nuisance. If it is, this is where you come to make it stop.

Choose Word Options ➪ Advanced ➪ Cut, copy, and paste ➪ "Use smart cut and paste Settings" to display the Settings dialog box shown in Figure 6-7. The "Adjust sentence and word spacing automatically" option is the one that generally is most annoying to users. I hated it at first, but eventually found that by accepting its "smarts" I end up having to work less diligently when I'm moving words and sentences around. When you're pasting words and phrases, this setting ensures that words aren't concatenated. When you're pasting sentences, it ensures that you don't have a letter immediately following a period. But from the school of YMMV (your mileage may vary): If the default setting is annoying you, try clearing the option for some relief.

FIGURE 6-7

Word lets you control sometimes annoying cut and paste behavior.



View Annoyances

What you see is what you get — right? Well, if what you get is annoyed, then you've come to the right place. In this section I tell you how to quickly stop some of the most common view annoyances.

Nonprinting Indicators/Formatting Marks

First-time Word users can be really bothered by the onscreen display of nonprinting formatting indicators and marks. In particular, many users find the paragraph mark bothersome and distracting.

I like having as much visual information as possible when I'm writing, but if you want to stop this behavior, here's how: Press Ctrl+Shift+8 (Show/Hide) to toggle these nonprinting marks off and on. You can also toggle them on and off by clicking the ¶ (Show/Hide) mark in the Home ribbon tab.

Tip

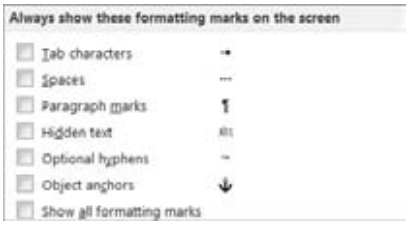
Right-click the ¶ symbol in the Home tab and choose Add to Quick Access Toolbar to make the toggle available regardless of which ribbon is displayed. ■

If the annoying marks don't go away, you'll need to examine the settings a bit more carefully. If individual marks are independently enabled, clicking the Show/Hide tool won't have any effect.

In Word Options ➪ Display, note the settings shown in Figure 6-8. The Show/Hide toggle affects only marks that aren't independently checked. Any that are independently checked stay on regardless of the overall toggle.

FIGURE 6-8

If any individual marks are checked here, they can't be toggled with Ctrl+Shift+8 or the ¶ tool (which toggle the Show/Hide option).



Missing Ribbon Tabs?

The observant Bible reader might have noticed a discrepancy between some of the ribbon screen shots in this book and her own ribbon. In particular, some of the screen shots in the Bible show the Developer and Add-Ins tabs.

To enable either or both of these two tabs, choose File ➪ Options ➪ Customize Ribbon. In the right half of the dialog box, under Main Tabs, click to place a check next to Developer and/or Add-Ins, as desired. The Add-Ins ribbon tab will display only if you have global add-ins that display additional tools. However, if they display and you have no need for them, feel free to remove the check next to Add-Ins.

Windows in Taskbar

By default, all document windows are displayed independently in the Windows taskbar (well, depending on your Windows 7 settings, but that's a different issue). If you're like me and work with numerous documents open at the same time, the utility quickly diminishes, as the icons seldom display enough of the text to make them identifiable at a glance.

To make Word stop displaying all open documents in the Windows taskbar, in Word Options, click the Advanced tab. Under Display, click to remove the check mark next to "Show all windows in the Taskbar."

To make working with document windows easier, right-click the View ribbon's Switch Windows tool and add it to the QAT. Another option would be to assign Switch Windows to a single keyboard shortcut so you don't have to press Alt+W twice.

Tip

When I have only a few documents open, I find that convenient, logical keyboard shortcuts are superior to both the taskbar and the Switch Windows list. I have Ctrl+Alt+Left and Right assigned to Word's built-in

PrevWindow and NextWindow commands. Imagining the documents lined up from left to right, the left key moves me to the left, and the right key moves me to the right. If you'd like to give this a try, in the Customize Keyboard dialog box, set Categories to "All commands," and find PrevWindow and NextWindow in the list of commands. ■

Online versus Local Help Content

Isn't the Internet great? Isn't it wonderful having high-speed Internet access available all the time, no matter where you happen to be working? Wow! It's wonderful having all these online resources always at your fingertips. Right?

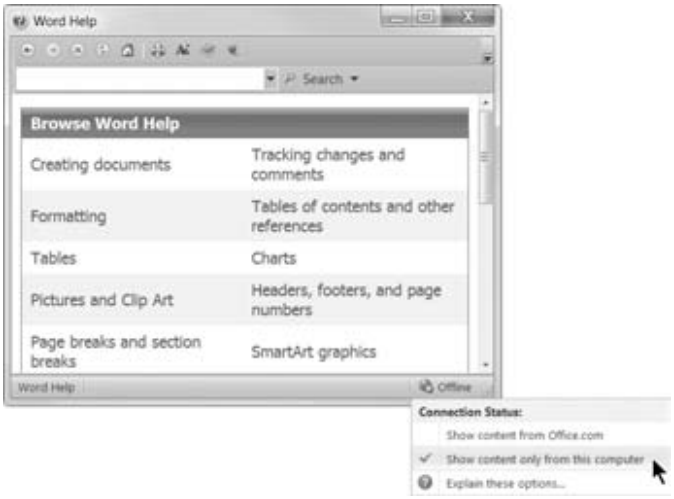
What? You're not online? You use dial-up? You're on a slow wireless connection? You're at an airport in a city where wireless hasn't been invented yet? Are you stuck in the Dark Ages?

By default, if you're online, Word's Help system assumes that you'd prefer to access Help using online services. It's nice to know that the Help system can search online as a last-ditch effort if your own local Help can't find an answer. However, it's not necessarily good that it's the first ditch, and not the last.

In any event, you can tell Word to use your own local offline Help. Not only is it faster, but I find that I often get help more directly related to Word and the problem at hand. To set the source of Word Help, press F1 to display Word Help. Click the box in the lower right corner, as shown in Figure 6-9. To force Word to use only the local Word Help files, choose "Show content only from this computer."

FIGURE 6-9

You'll often find more directly relevant help faster by using Word's local offline Help files.



Activation Blues

Are your ribbons faded and unavailable? Are you unable to save new files? If so, then it's possible that you're suffering from the activation blues. Word requires activation. If you're using a trial version, you have to pay and activate the software. Even if you're using a purchased version, you still have to activate. What happens if you don't? If you don't and you open Word (or any Microsoft Office 2010 program) 50 times, your time is up. You are allowed 50 uses without activation. After that, Word goes into "reduced functionality" mode.

If someone else installed Word for you, you might have missed the opening credits. Even so, Office 2010 programs are supposed to nag you each time you chew into the 50 uses, reminding you that you have *x* number of uses left before Office 2010 turns into a pumpkin.

To determine whether activation is the source of your woes, click File ➪ Help ➪ Activate Product Key. If you see Product Activated, however, then I have good news and bad news. The good news is that activation isn't the problem. The bad news is that it's something else, most probably a corrupted `Normal.dotm` template (or other global add-in) or corrupted registry entries. Visit `http://word.mvps.org/` and search for "troubleshooting" for additional help.

Automatic Annoyances

Word does several things automatically by default that it doesn't have to do at all. Intended as conveniences, these vestiges of what Microsoft once dubbed *IntelliSense* are features many users would like to pound *sense*less. Personally, I prefer the nonviolent approach.

Bullets, Numbers, Boxes, and Borders

Word sometimes senses that you're typing a bulleted or a numbered list and volunteers to help you. Similarly, Word can sense that you're trying to place borders or boxes around text. Again, it plunges in to help.

Of course, sometimes you don't want any help. Maybe you never want that kind of help. To make it stop, choose Word Options ➪ Proofing tab ➪ AutoCorrect Options ➪ AutoFormat As You Type tab. Under "Apply as you type," remove the checks next to "Automatic bulleted lists," "Automatic numbered lists," "Border lines," and Tables, all shown in Figure 6-10.

While you're here, take a look at each of the other options. While "Define styles based on your formatting" might not be causing you to tear your hair out, some of the others might.

FIGURE 6-10

Many Word annoyances can be quashed with a careful tour of the AutoFormat As You Type options.

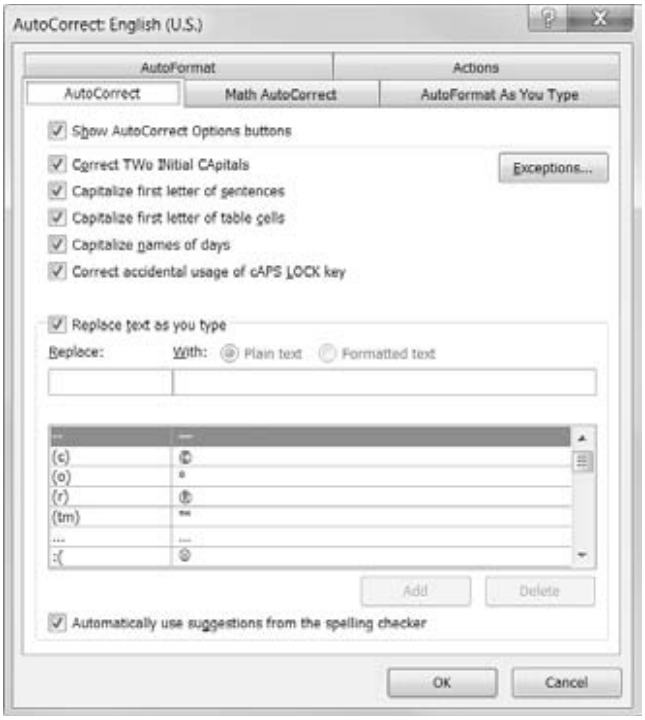


Capitalization

Are you plagued by an overeager little genie inside Word who insists upon capitalizing every other word you type? If so, you might find relief in the AutoCorrect settings. Choose Word Options ➪ Proofing tab ➪ AutoCorrect Options ➪ AutoCorrect tab. Shown in Figure 6-11, these settings are considered a blessing by some, a curse by others. Keep only the ones you agree with. If you find that other traces of automation haunt your writing, take a look at the Replace/With: list. For example, if you need (c) but not the copyright symbol, this is where you'll find relief. Find the (c) entry and click Delete.

FIGURE 6-11

Word automatically corrects what it considers mistakes. If you don't agree that they're mistakes, you can change the default.



Summary

In this chapter you've learned how to tame a variety of behaviors that otherwise might impair Word's utility. Among other things, you've learned how to do the following:

- Disable the drawing canvas
- Overcome a number of editing annoyances, including by gaining control over the insert key, preventing Word from undoing style changes, and controlling how Word pastes text from the clipboard
- Control the appearance of nonprinting characters, display all the ribbon tabs, and prevent Word from displaying each document in the Windows taskbar
- Save time and improve Help performance by using the built-in offline Help system
- Determine whether a lack of activation is the source of Word's nonperformance
- Control a number of Word's automatic formatting and capitalization behaviors

Part II

Word on the Street

Part II focuses on the baseline skills that every Word user needs and uses — regardless of why you use Word. This section covers the basics thoroughly but doesn't spend a lot of time belaboring things that are already obvious. Beyond that and more important, Part II is heavy on tips, pitfalls, and shortcuts. It also continues the drumbeat of leverage — namely, using document styles to save you time and work.

Chapter 7 begins with the basic unit of formatting — character formatting. Chapter 8 introduces and explains paragraph formatting, contrasting it with character formatting, and setting the stage for Styles. Chapter 9 combines elements of character and paragraph formatting, providing a full exposition on understanding and using Word Styles and the various style tools Word offers. Chapter 10 will show you everything you need to know about the clipboard, which is perhaps the most important time-saving word processing tool ever conceived. Finally, Chapter 11 will guide you through the powerful world of finding and replacing. When you need to change something, Word's Find and Replace tools offer power and control not found in any other word processor.

IN THIS PART

Chapter 7
Formatting 101: Font/Character Formatting

Chapter 8
Paragraph Formatting

Chapter 9
In Style!

Chapter 10
The Clipboard

Chapter 11
Find, Replace, and Go To

CHAPTER 7

Formatting 101: Font/Character Formatting

One of the more difficult conceptual hurdles in understanding Word is the way formatting is conceived. Some people think about formatting as a stream. You turn it on here, and it remains on until you turn it off later.

However, Word's formatting "mindset" is not stream-oriented, it's object-oriented. Rather than turn formatting on in one place and off in another in order to format a block of text, you format objects such as letters, words, paragraphs, tables, pictures, and so on. However, saying the O word (object) causes some people's eyes to glaze over.

Another way to think about formatting is in *units*. Formatting can be applied to any unit you can select. The smallest unit that can be formatted is a single character. Discrete units larger than characters are words, sentences, paragraphs, document sections, and the whole document.

IN THIS CHAPTER

- **Character styles versus direct character formatting**
- **Character-formatting techniques**
- **Character-formatting tools**
- **Character-formatting keyboard shortcuts**

The Big Picture

Word has four levels of formatting: *character/font*, *paragraph*, *section,* and *document*. Things such as bold, italic, points, and superscript are called character or font formatting and can be applied to as little as a single character. I'll talk about the other levels of formatting in later chapters.

Personally, I don't like the adjective "font" formatting, because most people — including me — think of fonts as things like Times New Roman, Arial, and Tahoma. For me, "character formatting" is a lot clearer and less confusing, but because Word has a ribbon with a group called Font, as shown in Figure 7-1, we're kind of stuck with that terminology. We're all stuck with another term too: *text-level formatting*, which really means the

same thing as font and character formatting. It helps, however, to think in terms of character formatting, as a character is the smallest thing you can format in Word.

FIGURE 7-1

Much, but not all, of the character (or font) formatting is accessible from the Home ribbon's Font group.



Note

OK. I lied. Technically, the smallest thing you can "format" is a point between two characters, but the word "format" is debatable in this case. To split hairs, you can insert a bookmark at a point so that no characters are enclosed. Is that formatting? I don't think so, but somebody else might. ■

Note also that the Font group in the Home ribbon does not contain access to all character-level formatting. Language (English, English UK, Spanish, etc.), which can be applied down to a single character, is not shown there. Moreover, the Font group contains case (upper, lower, title, etc.), which isn't formatting at all. This type of capitalization is distinct from small caps and all caps, both of which are considered character formatting.

Styles and Character/Font Formatting

A few Word versions ago, possibly while many users weren't watching, Microsoft added to Word a new type of style. Before that there was just one type of style — the paragraph style — and styles could be applied only to a whole paragraph. It soon became clear, however, that a more flexible, sophisticated style was needed — one that could be applied to characters within a paragraph.

The *character style* was born. Using this new invention, it was suddenly possible to create styles for formatting book titles, article titles, names, phone numbers, Internet links — you name it.

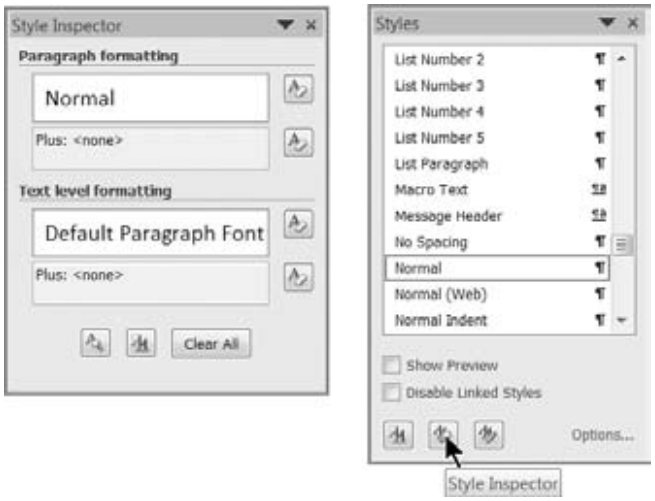
Later in this book (Chapter 9) you'll find an entire chapter on styles, but to understand character formatting there's a little you need to know at the outset, so please bear with me for another couple of paragraphs.

Even if you yourself never apply a style using Word's vast array of formatting tools, two styles are always in effect: a *paragraph* style and a *character* style. To demonstrate this, display the Styles pane by clicking the Styles launcher at the bottom right corner of the Styles group in the Home tab. Then click the middle icon at the bottom of the Styles task pane to display the Style Inspector, shown in Figure 7-2. You can dismiss the Styles pane if it's distracting.

Here the two styles applied are Normal (the default paragraph style) and Default Paragraph Font (the default character style for Normal). The latter is the name of the Normal style's default character style.

FIGURE 7-2

Use the Style Inspector when you want to fully examine the styles and direct formatting in use (direct formatting is identified by the word *Plus* in the Style Inspector).



Style versus Direct

I just went through that whole rigmarole so that I could explain that you have two ways to apply character formatting. You can use a style to apply character formatting, or you can apply character formatting directly. As you're typing along, it's really quite easy to apply bold, italic, or underlining to text. That's called *direct formatting*, and often there's no reason for you to format any other way. After all, the goal is to create a functional document in as short a time as possible.

Given that creating and applying styles involves more thought, preparation, and work than using direct formatting, it would appear that using direct formatting works better for my twin goals of speed and functionality. However, a shortcut is only as good as the time it saves you. If it ends up taking more time, then it wasn't really a shortcut at all.

For example, suppose that each time I need to type a book title I press Ctrl+B (for bold), type the book title, and then press Ctrl+B again to toggle bold off. That doesn't seem too onerous, right? Suppose my editors now tell me that they don't like book titles formatted that way. Instead, they want me to use bold small caps. Now I have to change the book title references so that they match the editors' requirements. If all book titles and only book titles were formatted as bold, I could use Word's Replace feature to simply replace bold with bold and small caps, but what if I've applied bold to something other than a book title? (The chances are good that I have!) Now I'm left carefully plodding through the document looking for things that look like book titles.

Or worse, suppose I need to correct the formatting error not in just one document file, but in dozens of files? I have a lot of work to do, right? That Ctrl+B shortcut doesn't seem like a very good shortcut anymore, does it?

If, instead, each time I wanted a book title I had applied a character style named Book Title, I'd be in much better shape. That way I could simply modify the Book Title style, and all of my book titles would obediently change. Even if the formatting "error" were propagated over dozens of different documents, I could change the definition of the style in the template on which those documents are based, use the Automatically Update Document Styles feature, and I'd be done.

The commandment is this: *If the formatting is something you will need to repeatedly apply to certain categories of text (such as book titles, programming commands, jargon, etc.), create a character style and use it.*

If, conversely, the use is *ad hoc* and not something for which you'll have a recurring need, then go ahead and use direct formatting. For example, when I'm writing a letter or memo and want to use bold for emphasis, I use direct formatting. When I'm writing a formal report and am referring to the name of a journal and a journal article, I use a style.

Tip

To make using styles less onerous, you can assign keyboard shortcuts to them. From Word Options, select the Customize Ribbon tab and choose Customize. Set Categories to Styles. Choose the style, click Press New Shortcut Key, press the desired key(s), (i.e., the exact combination you want to assign, such as Alt+9, Ctrl+Shift+F7, etc.) and then click Assign ➪ Close. Don't forget to click Assign! ■

Character Formatting

There are at least six ways of directly applying various kinds of character formatting:

- Using the Font group on the Home ribbon
- Using the Font dialog box (Ctrl+D or Ctrl+Shift+F, or click the Font Dialog launcher)
- Using the Mini Toolbar (hover the mouse over selected text)
- Using shortcut keys (see Appendix B)
- Using the Font group or components placed on the Quick Access Toolbar (QAT)
- Using the Language tool on the status bar

In this section I'll describe these methods and try to give you a sense of which ones to use. A lot depends on your working style, but your choice can also depend on what you happen to be doing. On any given day I'll probably use at least five of the six methods.

Formatting Techniques

To apply character formatting, you have three basic options:

- **Stream method:** Apply formatting before you start typing a word or passage, and then turn it off when you're done. For example, click the Bold tool, type a word, and then click the Bold tool again.

- **Selection method:** Select the text you want formatted and then apply the formatting.
- **Whole-word method:** Click anywhere in a word and then choose the desired formatting.

Note

The whole-word method is settings-dependent. It will work by default, but it will not work if you've turned off "When selecting, automatically select entire word" in the Editing Options section of Word Options ➪ Advanced. ■

It would be redundant to repeat the basic steps for each and every formatting type. The techniques described here apply to all character formatting described in this chapter.

Repeat Formatting (F4)

A tremendous time saver in Word is the Repeat Formatting command, invoked by the F4 key. Actually, F4 will repeat typing and many other actions too, but I find it most useful for repeating formatting.

Suppose for example that you're scanning a newsletter looking for people's names, which need to be made bold. There's John Smith, so you select his name and press Ctrl+B. Thereafter, however, it might be faster to position one hand on the mouse and the other on the F4 key. Click on Jane; press F4. Click on Doe; press F4. Or click to select Jane Doe as a phrase, and then press F4. The F4 key enables you to temporarily forget about pressing Ctrl+B, right-clicking, or traveling to the top of the Word menu in search of a formatting tool.

Now let's try something else. Click on a word and press Ctrl+B to make it bold. Now press Ctrl+I. Now the text is bold and italic. Click on another word and press F4. It's only italic! That's because F4 repeats only the most recent formatting (or other action).

Note that F4 and Ctrl+Y both do the same thing. Which you use is your choice. Many prefer F4 because it can be pressed with one finger. Others prefer Ctrl+Y because it doesn't involve as much of a stretch as F4.

Tip

If you have multiple or compound character formatting to repeatedly apply to a non-style-formatted series of words or selections, use the Font dialog box instead of individual commands. When you use the Font dialog box, all changes applied when you click OK become a single formatting event to the F4 key, so F4 can now apply multiple types of character formatting all at once. ■

Copy Formatting

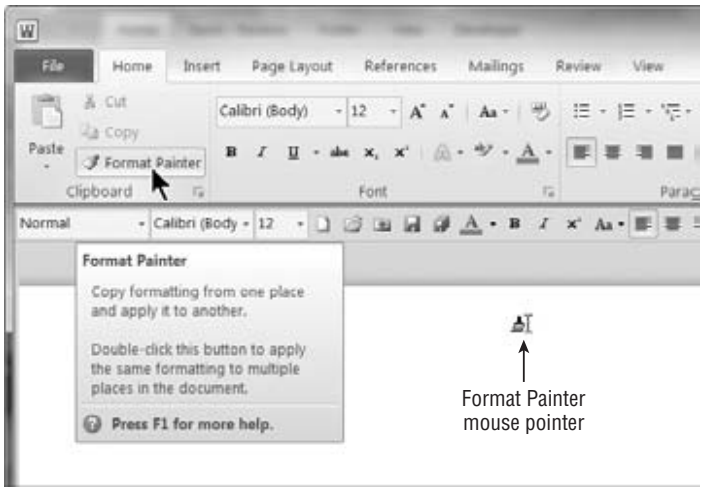
Sometimes, the moment for using F4 has passed, yet you're still left needing to reapply compound formatting. I'm assuming that for whatever reason you're not using a character style. Be that as it may, there are two common methods for copying formatting: the Format Painter and the Copy Formatting keystroke. Note that these tools aren't limited to character formatting. They'll work with many other kinds of formatting as well.

Format Painter

To use the Format Painter, click or select the item whose formatting you want to copy. If you want to clone that formatting just once, click the Format Painter in the Clipboard group on the Home ribbon, shown in Figure 7-3. If you want to apply that formatting multiple times, double-click the Format Painter.

FIGURE 7-3

Use the Format Painter in the Clipboard group to copy formatting.



Note that the mouse pointer turns into a paintbrush. Honestly! That's what it's supposed to be!

Next, if you're copying formatting to a whole word, click the word you want formatted. Presto! If you're copying to any other group of characters, use the mouse pointer to select the destination text. If you double-clicked the Format Painter, continue this until you're done. Press Esc or click the Format Painter again to exit format painting mode.

Keyboard Method

If you don't care for clicking the Format Painter button, that's perfectly OK. You'll need to know about two keystrokes:

- **Ctrl+Shift+C:** Copy Format
- **Ctrl+Shift+V:** Paste Format

This works very much like the Format Painter. Click in or select the text whose formatting you want to copy, and press Ctrl+Shift+C. Observe the mouse pointer. It's the Format Painter pointer! Now, move to or select the text onto which you want the formatting copied and press Ctrl+Shift+V. Note that there is no keyboard equivalent for the multi-copy method (double-clicking on the Format Painter), but you can combine the two methods, initiating the process by double-clicking the Format Painter and then ending it using Ctrl+Shift+V.

Clear Formatting

There are several degrees of clearing formatting. Here I'll talk about two of them:

- Clear direct character formatting (ResetChar)
- Clear all formatting (ClearAllFormatting)

The first is the venerable Ctrl+Space command known and loved by many in every version of Word they can remember. It's also a widely misunderstood command. This command does not remove all character formatting. It removes all *direct* character formatting. So if the selected text's formatting all comes from styles applied to the text — regardless of how bizarre or compound the formatting might be — Ctrl+Space will have no effect whatsoever.

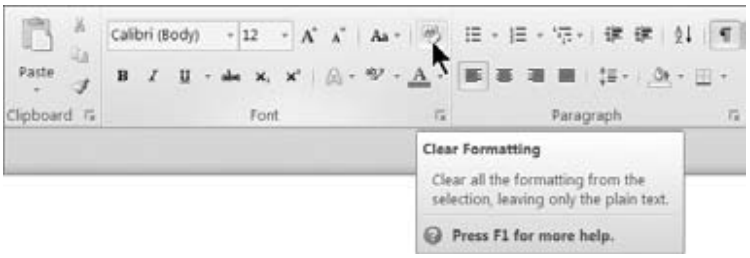
For example, when you apply Heading 1 to a section of text, that text becomes bold. Ctrl+Space can't touch that bold formatting since it was applied though the style rather than via Ctrl+B or the Bold tool. If you use direct formatting to italicize a word in an otherwise non-italicized heading, however, now Ctrl+Space can remove it.

New Feature Alert!

The second type of formatting removal is completely new to Word 2007 and 2010. It is accessible via the Clear Formatting tool on the Home ribbon, shown in Figure 7-4. This command is quite different from Ctrl+Space.

FIGURE 7-4

The Clear Formatting tool is actually misplaced in the ribbon. It affects not only character/font formatting, but paragraph and style formatting as well.



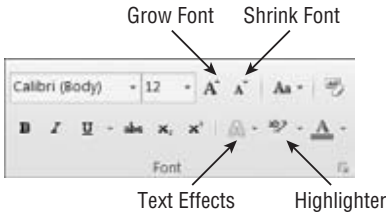
Using this new command is the moral equivalent of copying a selection to the clipboard and then using Paste Special ➪ Unformatted Text to paste it back into the document. It strips out all formatting.

The Ribbon Font Group

The Font group is shown in Figure 7-5. The Font group is compressed or expanded depending on the width of the current Word window. In its full glory, the Font group can display up to 15 separate tools (not including the Font dialog box launcher, which I'll talk about in a moment).

FIGURE 7-5

The Font group is Word's ''discoverable'' way of applying character formatting.



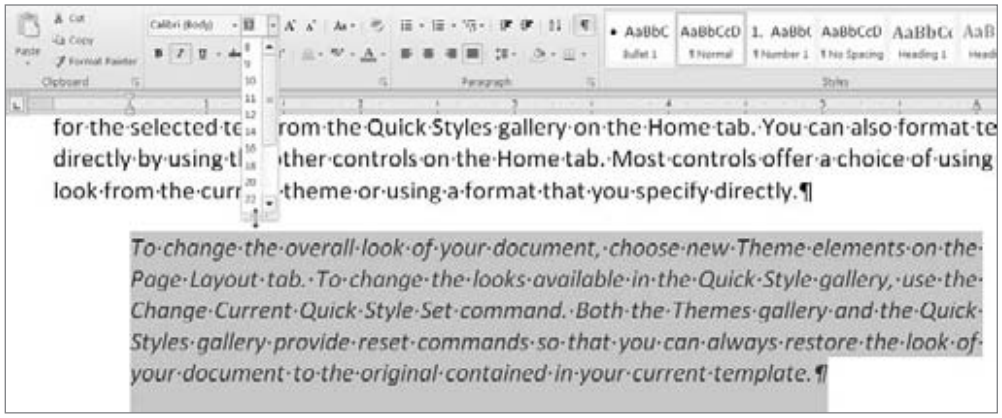
Four of the Font tools feature live preview:

- Font (e.g. typeface name, such as Calibri)
- Font/Point Size
- Highlight color
- Text color

As shown in Figure 7-6, live preview shows you the results of the selected (but not yet applied) formatting. Two of the live preview controls — Font and Font/Point Size — can be rolled up and out of the way, as shown in Figure 7-6. The other two cannot.

FIGURE 7-6

Dots at the bottom of a live preview control indicate that it can be rolled up and out of the way.

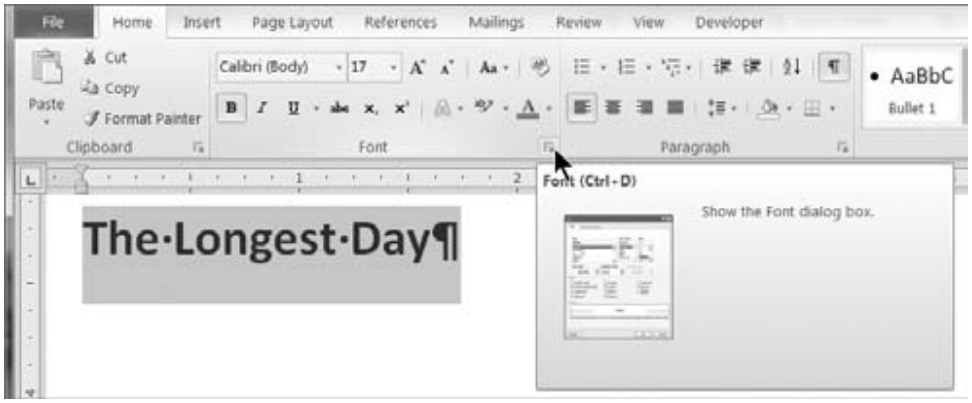


As shown in Figure 7-7, there's also a sixteenth control — the Font dialog box launcher. The Font dialog box is nearly identical to its counterpart from Word 2007, — except that Word 2007's Character Spacing tab is now the Advanced tab in Word 2010. If you upgraded directly from Word 2003, you'll also notice that Text Effects have been moved from the Font tab to the

Advanced tab, and are quite different from the Word 2003 feature (see Chapter 3). Word 2010's new text effects are closely tied to the new implementation of WordArt (see Chapter 22).

FIGURE 7-7

Use the Font dialog box launcher to display the nearly full-service dialog box.



Some of the icons in the Font group might seem a bit obscure and indistinct. Hover the mouse pointer over each of the controls to see what it does. Notice that for many of the controls, if shortcut keys exist, they are indicated in the Super Tooltip. However, this is not the end of the story. Some tools, for whatever reason, might not show the shortcuts. Jump ahead to "Character-Formatting Shortcut Keys" later in this chapter if you're just dying to know what's assigned to what.

Typeface or Font

Some call it font, some call it typeface. Some skirt the nomenclature issue by simply saying what typeface or font they want (Times New Roman, Arial, etc.). Whatever you call it, it's key to a document's appearance.

Upgrade Note

In Word 2003 you could move the focus to the Font tool in the toolbar by pressing Ctrl+Shift+F. That precise functionality no longer exists in Word 2007 and later. Instead, that keystroke now does the same thing as Ctrl+D, which is to show the Font dialog box.

Font Size

Font or Point Size controls the height of the font, generally measured in points. A point is $\frac{1}{72}$ of an inch, so 12 points would be $\frac{12}{72}$ (or $\frac{1}{6}$) of an inch. For Word, a font set's point size is the

vertical distance from the top of the highest ascending character to the bottom of the lowest descending character.

You aren't limited to the range of sizes you see in the ribbon. Word can go as low as one point and as high as 1,638 points. Plus, you can set the height in increments of half a point. Hence, a point size of 1637.5 is perfectly valid.

As with typeface, Word 2007 and later will not let you make a key assignment that takes you directly to the exposed Font Size control. While Ctrl+Shift+P did that in Word 2003 and earlier, Ctrl+Shift+P now simply takes you to the Font dialog box, where Size is highlighted.

Grow/Shrink Tool and Keyboard Shortcuts

Text size can also be controlled with the Grow Font and Shrink Font tools (refer to Figure 7-5). If you hover the mouse pointer over these you'll also learn that they both have shortcuts, Ctrl+Shift+> and Ctrl+Shift+<, respectively.

Note

The tooltip actually says Ctrl+> and Ctrl+<, and technically that's right because > and < are a shifted period and comma, respectively. Personally, though, I'd rather have you understand exactly what keys to press than stand on ceremony. ■

If you click the drop-down arrow next to the Font Size tool, you'll notice that the font sizes listed do not consistently increase by twos. Instead, they go from 8 to 12 in increments of one, then from 12 to 28 in increments of two, and then leap to 36, 48, and 72. The Grow and Shrink Font tools follow the listed increments.

If you want a finer degree of control (for example, when you're trying to make text as large as possible without spilling onto an additional page), you should know about two additional default shortcut keys: Ctrl+[and Ctrl+]. These two commands shrink or enlarge the selected characters by one point. The extra granularity often is just what you need to find the largest possible font you can fit inside a given space, such as a page, table, or textbox.

Color

Word has three color settings that can be applied at the character level:

- **Text color:** The color of the characters themselves
- **Shading:** The color of the background immediately behind the text
- **Highlighting:** The electronic equivalent of those neon-colored felt markers you use to annoy people who ask you to read things you don't want to read

Text Color

Text color is pretty self-explanatory, except when it's not. Most of us know what red, black, and blue are, but what is automatic? Automatic can be black or white, and is based on the shading. If the shading is so dark that black text can't be read without difficulty, Word automatically switches the display color to white.

Shading

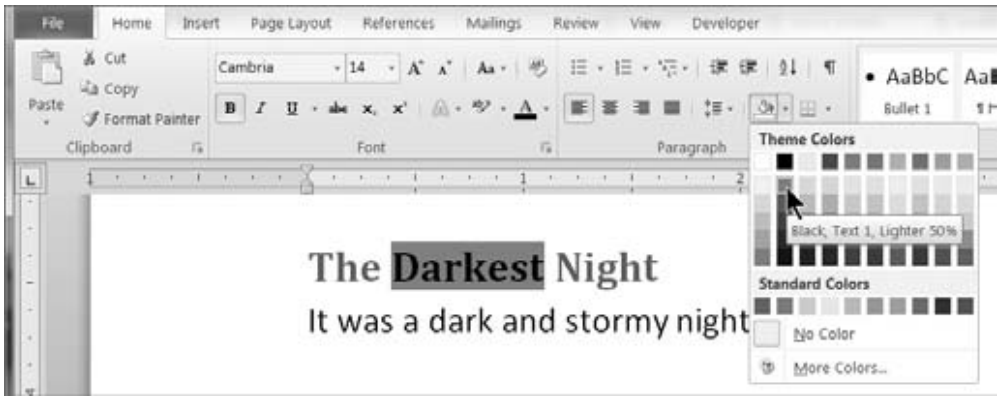
We'll talk about design considerations in a later chapter. For now, note a few things about shading that sometimes escape notice. Looking at the Home ribbon and the placement of Shading (second from the right under Paragraph), you might be tempted to believe that shading is paragraph-level formatting. Indeed, it sure acts that way. With nothing selected, Shading acts on the entire current paragraph. (You'll learn more about this later.)

However, if you select a single word or character, Shading suddenly acts like a character-formatting attribute. Well, that's what it is. Because people seldom vary the shading within any given paragraph, it is treated as a paragraph attribute by Word's interface. And yet, just like font, font/point size, bold, and italic, shading is a character attribute.

As shown in Figure 7-8, shading also affects the display of text color. In this case the shading color is maroonish, which you can't tell in the printed version of this book. Keep the character aspect of shading in mind when we look at the Font dialog box, coming up shortly.

FIGURE 7-8

Despite its placement in the Home ribbon, shading can be applied to a selection of characters.



Highlighting

The Text Highlight Color control — more generally known as the *highlighter* — is shown in Figure 7-5. It actually has four modes of operation. Most people are aware of one mode or another, but not all four.

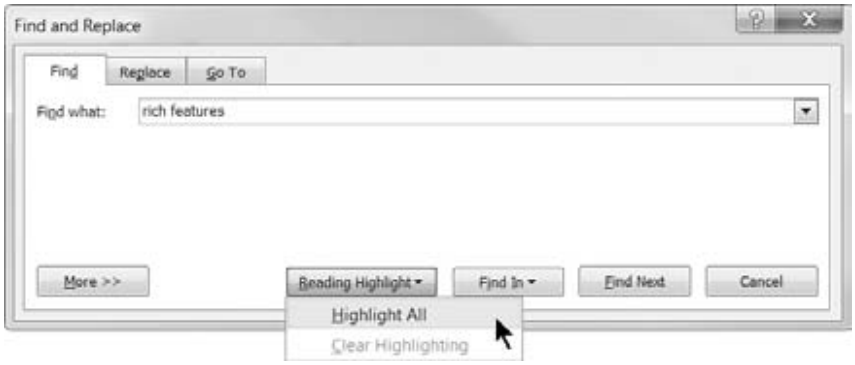
One method is to select text and then click the highlighter. This is the method that most users are aware of. It's pretty effective, but it might not reflect the actual highlighting process.

A second method is to turn the highlighter on by clicking the Text Highlight Color tool, and then to use the mouse to select areas you want highlighted. The highlighter mouse pointer stays active until you click the Text Highlight Color tool again, or until you press the Esc key.

A third method can be used to apply highlighting to all occurrences of a given word or phrase in a document, using the most recently applied highlighting color. Press Ctrl+F, drop down the Find Options arrow, and click Find ... to open the Find dialog box. Type the word or phrase of interest, and then choose Reading Highlight ➪ Highlight All, as shown in Figure 7-9.

FIGURE 7-9

Use Find to apply a *reading highlight* to every occurrence of a word or phrase in your document.



A fourth highlighting method is one I find a bit more useful than the Reading Highlight feature. It works from the Replace dialog box. Press Ctrl+H (Replace) and click the More >> button. In the "Find what" field, type the word or phrase you want to highlight. Clear the contents of the "Replace with" field, and in Replace's lower left corner choose Format ➪ Highlight. Click Replace All to apply highlighting to all occurrences of the "Find what" text. Highlighting inserted this way is more robust than highlighting inserted via the Reading Highlight feature, and will not disappear if you choose to manually manipulate highlighting.

Note that when the "Replace with" field is blank but has associated formatting, the formatting is applied to text that matches the "Find what" text. If both formatting and "Replace with" text are absent, Replace deletes all occurrences of the matching text.

You can also choose not to print highlighting. This gives you the best of both worlds. You can mark up a document for your own benefit, and then — if you wish — print it out without the highlighting. Not only is this good for keeping internal guides private, it also saves money on yellow ink. To prevent the printing (or displaying) of highlighting, choose File ➪ Options, select the Display tab, and remove the check next to Show Highlighter Marks. If you hover over the information while you're here, the tip informs you that this controls both display and printing. Click OK when you're done.

Tip

One very annoying thing about highlighting is that if you use the select-and-highlight method, Word undoes the selection after you apply highlighting. This can be really irritating if you use the wrong color, but if you immediately press Ctrl+Z or click Undo, Word not only undoes the highlighting, it also reselects that section of text so you can take another stab at highlighting it. ■

Change Case

Change Case doesn't really fit in here, but that's precisely why it's included. Case is not formatting. Case is a choice of what capitalization to use — uppercase, lowercase, or some combination thereof. Why does Microsoft put it in the Font group? I don't know for sure, but it's probably because it can affect groups of characters, and doesn't really fit anywhere else.

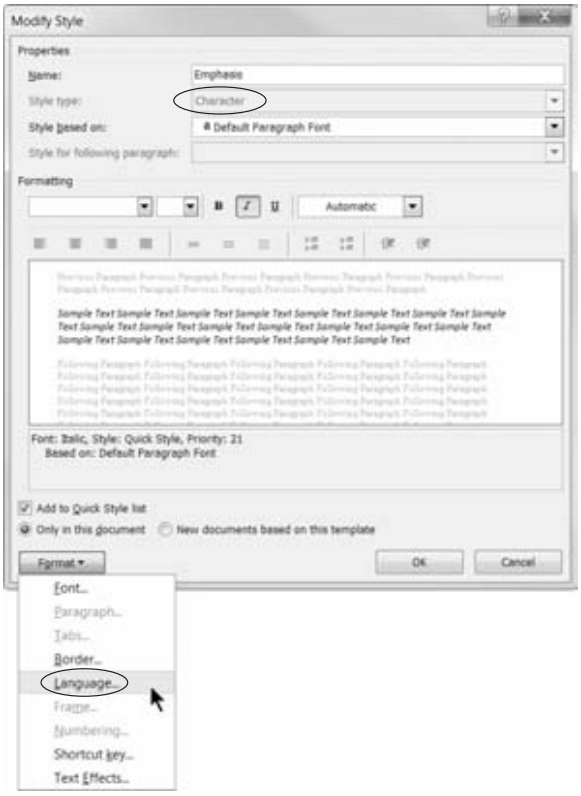
The first thing you need to know is that you cannot use any variation of this command to affect style definitions in your document. For example, you can't apply lowercase to text, turn it into a style, and then use that style to format Internet keywords. It could be useful, but this feature must await some distant version of Word as yet unannounced. (For now, you can include all caps or small caps as elements of a Word style, not that that helps with Internet addresses.)

Language

Note that language is not included in the ribbon's Font group. You'll also notice that it's not present in the Font dialog box either, so how do you know it's a character-formatting attribute? Two reasons: First, it can be applied to a single character in a document. Second, it can be included in a character style definition, as shown in Figure 7-10.

FIGURE 7-10

Language is included among the attributes associated with a character style.



You set the language using the Language tool on the status bar. If you don't see it, then right-click the status bar and click to enable Language. Among the Language tool's more useful features is the "Do not check spelling or grammar" setting, which you can apply to text. This can be handy for technical jargon and programming keywords that you might not want checked.

Conversely, "Detect language automatically," the last feature, shown in Figure 7-11, can be a real troublemaker. With that setting turned on, it's possible for text to unintentionally be tagged as some other language, resulting in large sections of text being flagged as misspelled. If the corresponding proofing tools are not installed, the text is not checked at all, even though it's not actually formatted as "Do not check. . ." This can leave large section of text unintentionally unchecked. You should turn that setting off unless you actually need it. It is enabled by default!

FIGURE 7-11

The ''Do not check spelling or grammar'' option can be useful for technical writers. ''Detect language automatically'' can cause problems for chronically bad spellers!



To set the default for all documents based on the current template, choose the desired language as well as the desired settings for the last two options, and then click Default. Confirm the settings by clicking Yes. Note that even though the confirmation box doesn't mention the latter two settings, they are included in the changes made to the underlying template.

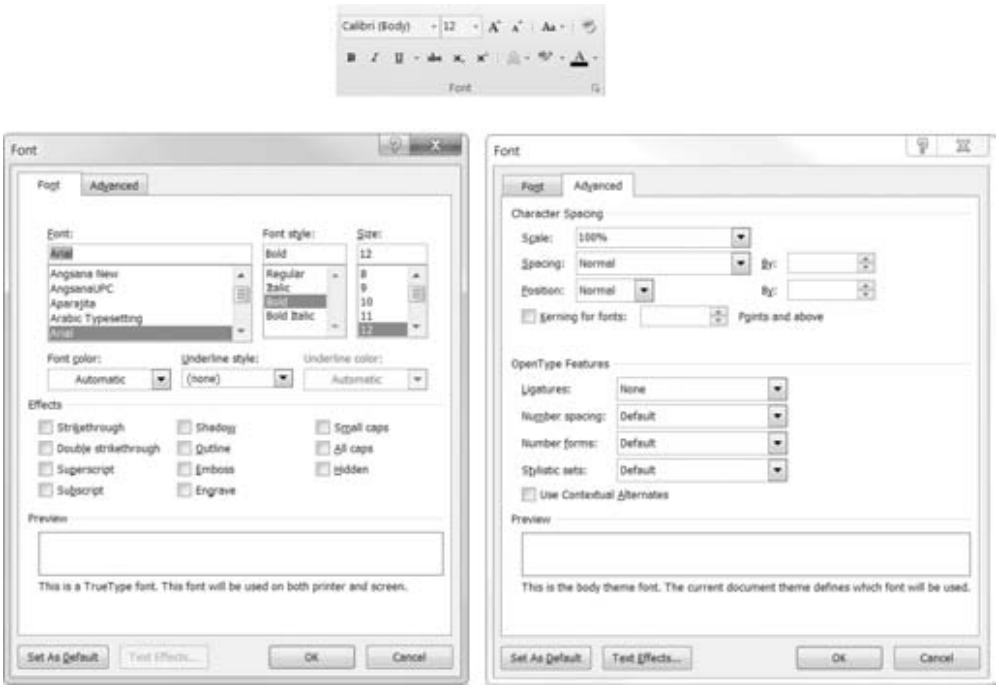
The Font Dialog Box

The Font dialog box, shown in Figure 7-12, can be a useful tool when you're applying multiple character format changes at the same time. Note, however, that the Font dialog box and the Font group on the ribbon do not provide identical capabilities. Not only doesn't the Font dialog provide any live preview at all (just the static preview box); it contains different commands and settings.

Most font attributes are largely self-explanatory. Experiment with them to see the different effects. Conspicuously missing from the Home ribbon are the controls in the Font dialog box's Advanced tab, shown in Figure 7-12. Note the Scale and Spacing controls.

FIGURE 7-12

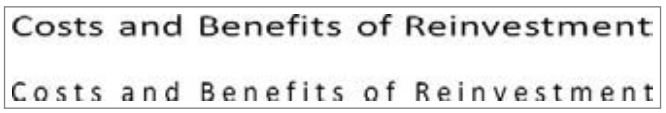
Only some of the functionality of the Font dialog's two tabs is replicated on the Home ribbon.



Scale is used to stretch or compress the actual characters. Spacing is used to expand or condense only the spacing. Scaling and spacing expansion are demonstrated on the text shown in Figure 7-13. The top sample was scaled up 150%. The characters and spaces were all stretched horizontally. The bottom sample was expanded by 2.8 points. An additional 2.8 points of spacing were inserted between each character. Even though both samples are nearly identical in height and width, the top sample actually looks larger.

FIGURE 7-13

Scaling and horizontal spacing can yield texts of identical length and height, but with very different appearances.



Position is used to raise or lower the selected characters by a specified number of points. Unlike spacing, which can vary by as little as .1 points, position's smallest gradation is .5 points. This tool is sometimes used to adjust subscripts and superscripts if the built-in versions don't

accomplish the desired effect or you need the subscripts and superscripts to be the same size as the surrounding text.

Tip

If you have a chronic need to adjust subscripts and superscripts, you might consider creating a character style that gives you the desired formatting. ■

OpenType Features

New in Word 2010 are the OpenType Features, which are shown in Figure 7-12, in the Advanced tab. Developed largely by Microsoft, OpenType is the successor to TrueType fonts, which helped in making fonts scalable. OpenType adds additional features that allow you to manipulate some of the more intricate aspects of fonts and number spacing. If you have problems aligning numbers in numbered lists, you might care to examine the OpenType features more carefully. I encourage you to consult Wikipedia or other online sources if you want to know more about these features.

The Mini Toolbar

Yet another tool for applying formatting is the Mini Toolbar. Introduced back in Word 2007, this feature is fully explained in Chapter 1. Shown in Figure 7-14, The Mini Toolbar has a sampling of character-formatting tools from the Home ribbon. Unlike the ribbon tools, however, none of the Mini Toolbar's tools provide live preview.

FIGURE 7-14

The Mini Toolbar has a sampling of character-formatting tools from the Home ribbon.



The Mini Toolbar's singular but important claim to fame for many users will be its ergonomic utility. When you need something on it, it's right there, close to the text. Many of its tools are easily accessible via direct keystrokes, as you'll see in the next and final section in this chapter.

Character-Formatting Shortcut Keys

Many of the character-formatting commands discussed in this chapter are accessible via built-in keyboard shortcuts. Longtime users of Word undoubtedly have many of them committed to memory. Newcomers, however, might need a quick guide. As you navigate your way through Word 2010, keep your eyes open. Quite often, Word will show you its built-in key assignments. To make sure this happens, do the following:

- In File ➪ Options ➪ General, set ScreenTip Style to something other than Don't show Screen Tips.

- In Word Options ➪ Advanced ➪ Display section, enable "Show shortcut keys in ScreenTips."

Table 7-1 provides a quick reference of keyboard shortcuts related to character formatting. This list might not be exhaustive.

TABLE 7-1

Default Character-Formatting Keyboard Shortcuts

Command	Keystroke
All Caps	Ctrl+Shift+A
Bold	Ctrl+B, Ctrl+Shift+B
Copy formatting	Ctrl+Shift+C
Font dialog box	Ctrl+D, Ctrl+Shift+F
Highlighting	Alt+Ctrl+H
Hyperlink	Ctrl+K
Italics	Ctrl+I
Paste formatting	Ctrl+Shift+V
Font/Point size	Ctrl+Shift+P
Font/Point size: decrease by one point	Ctrl+[
Font/Point size: decrease to next preset	Ctrl+Shift+<
Font/Point size: increase by one point	Ctrl+]
Font/Point size: increase to next preset	Ctrl+Shift+>
Remove non-style character formatting	Ctrl+Space
Small caps	Ctrl+Shift+K
Subscript	Ctrl+=
Superscript	Ctrl+Shift+=
Symbol font	Ctrl+Shift+Q
Toggle case of selected text	Shift+F3
Underline	Ctrl+U
Word underline	Ctrl+W

Summary

For most of us, the most important thing about the documents we create is the choice of words. Character formatting is mostly about formatting words. In this chapter you've seen the variety of things you can do to words and characters. You should now be able to do the following:

- Apply character formatting to a text selection of any size, from a single character up to a complete document
- Choose whether to apply formatting directly or to use a character style
- Distinguish between character formatting and characters
- Decide, from among the variety of formatting tools, which one to use in any given formatting situation
- Remove unwanted character formatting
- Save time by using shortcut keystrokes and shortcut techniques

CHAPTER 8

Paragraph Formatting

Everything you type in Word resides in paragraphs. Even if you type nothing at all, in fact, every Word document — even one that you believe is completely empty — contains at least one paragraph. The key to knowing that a paragraph is present is the ubiquitous paragraph mark: ¶. If you don't see them in Word right now, perhaps you have them turned off. Pressing Ctrl+Shift+8 toggles them and the other nonprinting characters on and off. See "Nonprinting Indicators/Formatting Marks" in Chapter 6 for a complete discussion of this endlessly fascinating topic.

Also called a *pilcrow* or an *alinea,* in Word the paragraph mark is the repository of paragraph formatting. Delete a paragraph's pilcrow, and you've extinguished its soul. A little dramatic? Perhaps, but Word is filled with drama. Just ask anybody who ever wrestled with numbering in Word 2000.

In this chapter I'll go into detail about paragraph formatting, and along the way I'll try to demystify aspects that seem to leave people scratching their heads. You'll also learn about the interaction between selected Word options and the nuances of paragraph formatting.

IN THIS CHAPTER

Paragraph formatting

Using direct paragraph formatting versus using styles

Indentation and alignment

Numbering and bullets

Shading and borders

Bonus tips

Styles and Paragraph Formatting

One of Word's challenges is that there often are multiple ways to do the same thing. For any given set of circumstances, however, only one way is the most efficient. The challenge is to see through the clutter and determine which way is best.

"I don't use styles," is something I hear quite frequently, but that can't be true. If you're using Word, you're always using two styles: a paragraph style and a character style. When people say, "I don't use styles," they mean that they use just a single paragraph style, called Normal, and a single character

style, called Default Paragraph Font. More to the point, they mean that they simply ignore the existence of styles.

Any formatting variation such "astylists" might achieve is made through variant or direct formatting. I'm not going to snobbishly sit here and tell you that paying no attention to styles is a sin. (Although, come to think of it, this is a Bible. . .) There are times when you have to do something ASAP, and if ignoring styles gets that "The building is on fire!" memo finished sooner than fumbling with unfamiliar tools and concepts, then so be it.

This chapter will tell style shunners what paragraph formatting is, what it's for, and how to use it. It also will tell style users the same things, but the latter will have a broader context for it all as well as a strategy, because paragraph formatting is integral to paragraph style formatting.

When to Use Styles

The same commandment that applies to character style formatting (see Chapter 7) applies to paragraph style formatting. If it's a one-time ad hoc need, direct paragraph formatting is entirely appropriate. For example, if it's a centered heading on a one-time announcement you're going to tack to a bulletin board, feel free to simply press Ctrl+E.

On the other hand, if it's formatting that you're going to need again and again, then use a style. For example, if it's one of a number of headings in a monthly newsletter you're going to be assembling for the next five years, either adopt and adapt built-in heading styles to suit the need, or create your own styles. The more work styles can do for you, the less time you're going to have to spend formatting and reformatting.

What Exactly Is a Paragraph, Anyway?

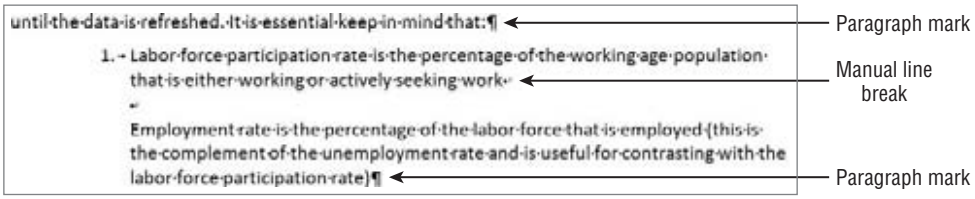
With apologies to Mrs. Hewitt, my eighth-grade English teacher, a paragraph is everything between two different paragraph marks. Shown in Figure 8-1, all of numbered item 1 is a single paragraph. Note, however, that a single sentence separated by two paragraph marks is also a complete paragraph — to Word — as is a paragraph mark that contains no associated text at all.

Many new Word users often are distracted by the display of nonprinting characters (such as paragraph marks, manual line breaks, spaces, and tabs). As shown in Figure 8-1, however, displaying them can give you essential clues about what's going on in a document.

Sometimes it's useful to use a manual line break within a paragraph while still keeping it as a single paragraph. This most often is done within numbered or bulleted paragraphs. That way any paragraph formatting you do to any part of the paragraph is done to the entire paragraph (such as the main indentation and numbering), despite its disjointed appearance. If the paragraphs are numbered or bulleted, a manual line break prevents a new number or bullet from being assigned to the disjointed portion.

FIGURE 8-1

A paragraph is everything between two paragraph marks.



If you're in the habit of working with nonprinting characters turned off, you might sometimes find that it's useful to occasionally turn them on when trying to diagnose the behavior of text. You can toggle them by pressing Ctrl+Shift+8. If any marks don't toggle, then check File ➪ Options ➪ Display to see whether any are set to be displayed all the time.

Another useful diagnostic aid in analyzing paragraph formatting is the Reveal Formatting pane, shown in Figure 8-2. You display it by pressing Shift+F1. It shows all the formatting that's common to the selected text, or that's applied at the insertion point. It has three segments: Font (character formatting), Paragraph, and Section. (Thanks to Word's thesaurus, I just neatly sidestepped having to refer to the bottom segment as the "section section.") It also displays the selected text, if any, using the current common formatting, as best it can. If nothing is selected, it displays the words "Sample Text" using common current formatting.

Why do I say that it displays the common formatting? That's because the selected text might not be formatted homogeneously. In this case, although you can't see it, the sentence in the text was "It was a **dark** and *stormy* night." Because some formatting (bold and italic in this case) might not be common to the entire selection, you can't use Reveal Formatting to determine whether a given selection contains any formatting of a particular type.

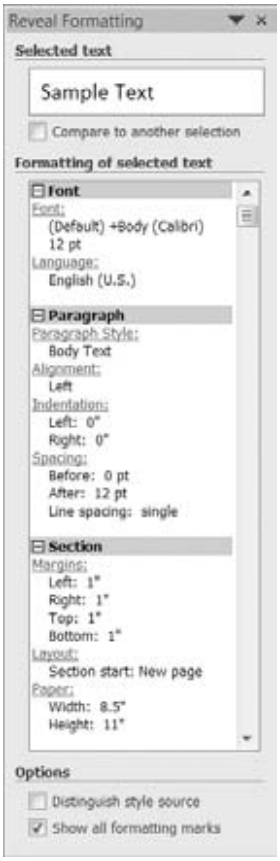
Notice that the Reveal Formatting pane does not tell you what style is applied. We will look at other tools later on that help us with styles. In this chapter we focus only on the paragraph segment.

Tip

The Reveal Formatting pane is not accessible from the built-in ribbon interface. If you want to be able to access it from the Quick Access Toolbar (QAT), you can add it. To do so, right-click the QAT and choose Customize Quick Access Toolbar. Set "Choose commands from" to "Commands not in the ribbon." Click in the list and tap the S key to accelerate to that part of the alphabet, and then tap the up arrow key five times to select Reveal Formatting. Click Add ➪ OK, and you're done. ■

FIGURE 8-2

Press Shift+F1 to toggle the Reveal Formatting pane. It shows all the formatting in effect for the selection.



Paragraph-Formatting Attributes

Paragraph formatting, like character formatting, can be applied with a wide variety of tools that apply certain paragraph attributes. Many of those attribute controls, but not all, can be found in the Paragraph group in the Home ribbon, shown in Figure 8-3. Indent and Spacing, both of which are paragraph attributes, are located on the Paragraph group in the Page Layout ribbon, also shown in Figure 8-3. A number of attributes missing from the ribbon are on the horizontal rulers: left and right indent, hanging and paragraph indent, and tab settings.

FIGURE 8-3

The Paragraph sections in the Home and Page Layout ribbons contain a number of paragraph-formatting controls.



Paragraph group from Home ribbon tab

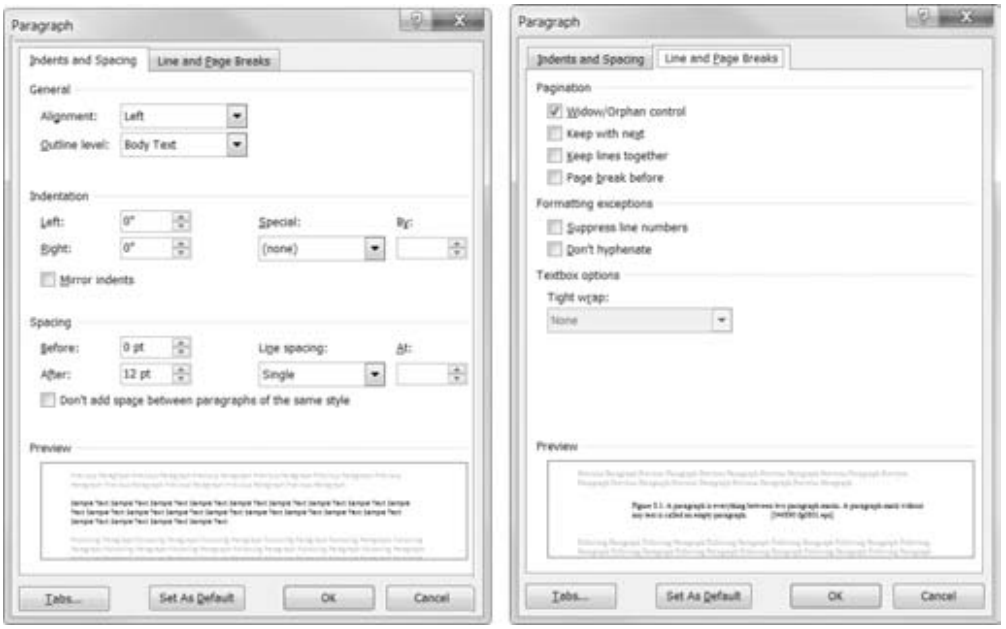


Paragraph group from Page Layout ribbon tab

Many paragraph attributes — but again, not all — are also found in the Paragraph dialog box, shown in Figure 8-4. You can display the Paragraph dialog box by clicking the launcher in the lower right corner of the ribbon's Paragraph groups, by double-clicking any of the indent controls on the horizontal ruler, or by pressing the legacy keystrokes Alt+O and Alt+P.

FIGURE 8-4

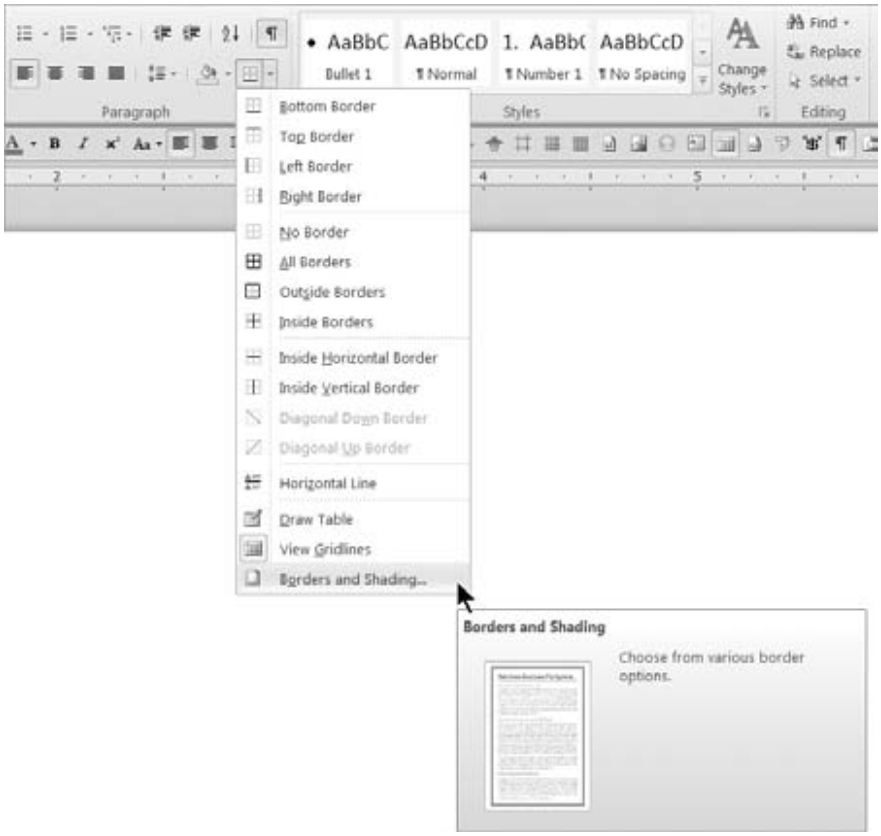
The Paragraph dialog box contains controls for most, but not all, of Word's paragraph attributes.



Missing from the dialog box, of course, are tab settings, which you can access by clicking Tabs in the Indents and Spacing section of the dialog box. Also missing are borders and shading, which you can access by clicking Borders and Shading from the bottom of the Border tool's list of settings (in the Home ribbon), shown in Figure 8-5.

FIGURE 8-5

The Borders and Shading dialog box can be accessed from the bottom of the Borders control in the Home ribbon.



You might be wondering from all this how to determine whether a setting is a paragraph-formatting attribute. One way is to see whether the attribute can be applied to a paragraph without the whole paragraph's being selected. For example, if you click anywhere inside a paragraph and click the Center tool on the ribbon, the whole paragraph is centered. The same anywhere-in-the-paragraph rule is true for each of the other alignment options. The same applies to borders, shading, indentation, bullets, numbering, and line spacing.

Note, however, that two "paragraph-formatting" attributes behave according to the *if nothing is selected, format the whole paragraph* rule, but behave differently if part (but not all) of a paragraph

is selected. These two are shading and borders. While they generally are considered paragraph formatting, they also can be character formatting.

Paragraph-Formatting Techniques

Two techniques can be used for all paragraph-formatting attributes. As noted, you can simply place the insertion point in the paragraph you want and then choose the attribute (using the ribbon, a dialog box, a keystroke, the context menu, or the Mini Toolbar).

The other technique is to select a range of paragraphs (up to and including the entire document). Note that even though shading and border formatting can apply to a selection of characters/words, if the selection includes or spans a paragraph mark, the formatting is applied to the entirety of all the paragraphs in the selection, even those that aren't fully selected.

Structural Formatting

Paragraph formatting can be thought of as encompassing two concepts:

- **Structural formatting:** Attributes that affect the overall structure of the text, such as alignment, indentation, tabs, etc.
- **Decorative formatting:** Attributes that affect the interior appearance of the text, such as shading, borders, numbering, and bullets

This section deals with structural formatting. Decorative formatting is addressed in the section that follows.

Indentation

Indentation typically is used for automatically indenting the first line of paragraphs, block-indenting quotes, and setting up hanging indentation for bulleted or numbered text. Preset indentation can be set via the Decrease Indent and Increase Indent controls in the Home ribbon.

Tip

You can also perform Decrease Indent and Increase Indent using the Backspace and Tab keys, respectively. To do this, first choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options. In AutoFormat As You Type, in the bottom set of options, enable "Set left- and first-indent with tabs and backspaces." This is enabled by default in Word, but many people turn it off because the feature sometimes appears to be "broken" (i.e., doesn't work the way the user expects it to). I should also note that it does not perform identically to the ribbon Decrease Indent and Increase Indent controls.

When this setting is enabled, the Tab and Backspace (also Shift+Tab, if you prefer symmetry) work as advertised, but only when the paragraph is not empty, and only if the insertion point is as far left as it can go (in any line in the paragraph). If the insertion point is anywhere else, the keys have their normal effects. Note that the first press of the Tab key (if the insertion point is at the beginning of the paragraph) indents only the first line of the paragraph. Subsequent presses indent the entire paragraph.

Special rules apply for the Backspace key. Backspace decreases the indent only when an indentation is actually set. If there is a negative indent and a first-line or hanging indent, the first Backspace press removes the

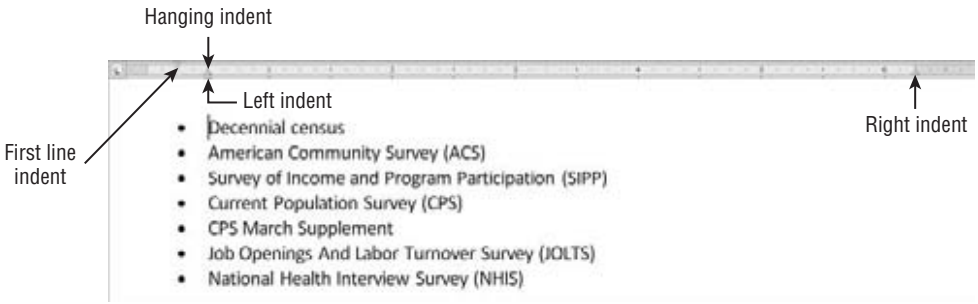
hanging or first-line indent. If there is a negative indent and no hanging/first-line indent, Backspace resets the indent to zero.

This is all potentially confusing enough that you might want to turn the setting off. In any case, if you turn it on, watch the ruler and the text when you press Tab or Backspace. One last thing: To insert an actual tab at the beginning of a paragraph when this setting is enabled, press Ctrl+Tab. This is also how you insert a tab into a table. ■

You can set more precise indentation using the Indent Left and Right settings controls in the Page Layout ribbon. A first-line or hanging indent typically is set with the mouse drag controls on the horizontal ruler, as shown in Figure 8-6.

FIGURE 8-6

The ruler provides GUI controls for indentation.



Tip

If you have trouble grabbing the ruler's tiny indent controls, you can use the tab/indent selection control at the left end of the horizontal ruler. Click the (usually) L-shaped control to cycle through the different tabs and indents and stop at the indent control that's giving you problems. With that control selected, you can now set a first-line or hanging indent by clicking the desired position on the ruler. ■

If you press the Alt key while manipulating the ruler's indent controls, Word displays the measurement, allowing for more informed positioning. Depending on your mouse's resolution, however, you might sometimes need to use the Paragraph dialog box's Special settings, shown in Figure 8-7. Here the settings are identical to those shown in Figure 8-6.

Mirror Indents

Word 2007 and 2010 aren't all just a flashy new interface. Keen observers who've used Word 2003 or earlier versions no doubt notice the Mirror Indents addition to the Paragraph dialog box. When this is enabled, Left and Right become Inside and Outside, as shown in Figure 8-8. This enables your indent settings to accommodate book style printing. Note that this is different from Mirror Margins, which is a Page Setup setting discussed in Chapter 25, "Page Setup and Sections."

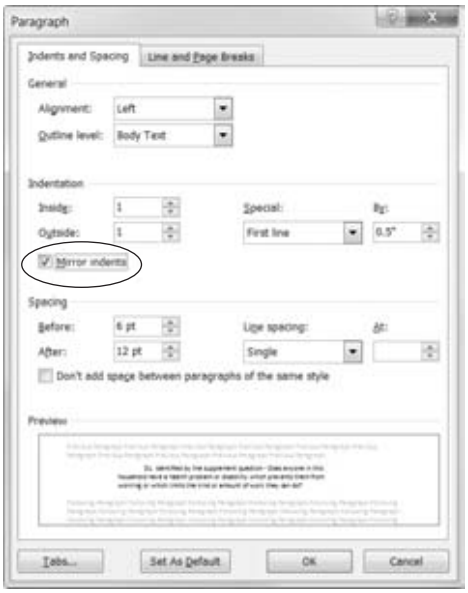
FIGURE 8-7

The Paragraph dialog box is ideally suited to users who need more precision for their settings.



FIGURE 8-8

Mirror Indents was introduced in Word 2007.



Alignment

Horizontal alignment determines how any given paragraph is oriented. The four options are Left, Right, Centered, and Justified. You can set these using the respective controls in the Paragraph group in the Home ribbon. They can also be made with the four Alignment options in the Paragraph dialog box. And finally, they can be set with Ctrl+L, Ctrl+R, Ctrl+E (don't ask), and Ctrl+J. How Ctrl+E ever came to mean "center" is a mystery to me, but it seems to mean "center" in a wide variety of Windows programs. Maybe it's because it contains two *E*s. In any case Ctrl+C is reserved for "Copy to Clipboard," so the purely intuitive choice for Center was already taken.

Tabs

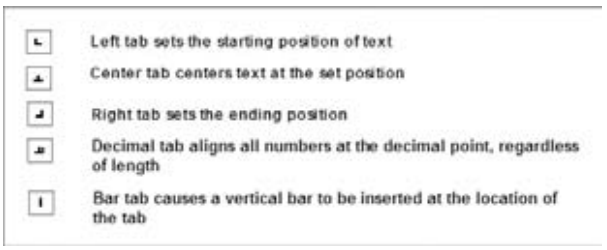
Tab is largely passé for many modern computer users. That's because better control can be effected with tables. Ever wonder why we call them tabs and tables? We call them tabs because that's short for tabulation. And we call them tables for the same reason. If you want the exact etymology, try the Oxford English Dictionary (OED).

By default, a new document doesn't have any explicit tabs set. However, when no explicit tabs are set, Word uses default preset tabs every .5″. When you set a tab, all the built-in preset tabs to the left of the one you set are removed, leaving the manually inserted tab and all remaining preset tabs to the right.

You can set tabs using the horizontal ruler line or the Tabs dialog box. Using the ruler line, you first determine the type of tab by clicking the tab control at the left end of the ruler. As indicated earlier, this control cycles not only among Word's built-in five tabs, but among first and hanging indent controls as well. The five built-in tab types are shown in Figure 8-9. When the desired tab type is displayed, click the lower portion of the ruler (below the eighth-inch detents) to set the desired tab(s). You can drag them for better placement; holding the Alt key while dragging shows you the exact location.

FIGURE 8-9

Tabs can be set visually by means of the ruler line.



To remove a tab using the ruler, simply drag it down and away from the ruler until the mouse pointer is no longer in the ruler area.

If you prefer the steadiness and precision of typing in the settings you want, use the Tabs dialog box, shown in Figure 8-10. Activate the Tabs dialog box by choosing Tabs from the Paragraph dialog box, or by double-clicking any existing tab in the ruler line.

FIGURE 8-10

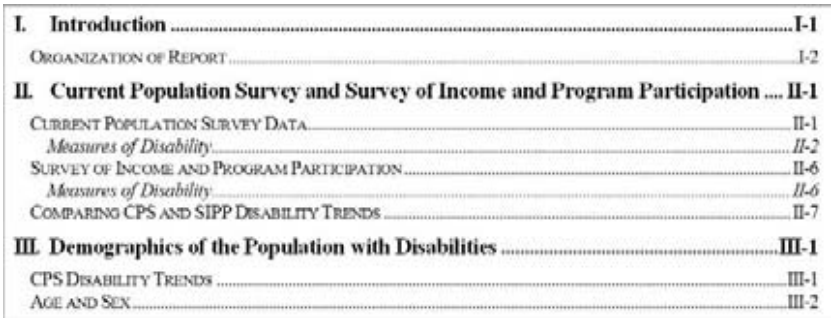
Use the Tabs dialog box to set and clear tabs, set the default tab stop interval, and set a tab leader.



Notice that the Tab dialog box also lets you set tab leaders, dashed or solid lines typically used to help the reader visually line up text and numbers. Tab leaders often are used in tables of contents and indexes, such as the one shown in Figure 8-11.

FIGURE 8-11

Tab leaders are visual aids that help the reader correctly align associated text.



Tabs versus Tables

If you can use tabs, and you can use tables, when should you use which? Years of using Word has convinced me that pseudo-tables, as I like to call tables that are created using tabs, are a lot more fragile than actual tables. They're also a lot less flexible.

Even so, there are times when tabs give you precisely what you want, and in a way that a table either can't or can't without your jumping through hoops. If you want lines connecting two tabbed items, while there are other ways to accomplish the same effect, it's almost always faster and easier to use tab leaders.

If you need to create an underscored area for a signature or other fill-in information on a paper form, the solid tab leader line is definitely the way to go, even though you could draw lines where you want them instead, using Insert ➪ Shapes ➪ Line (holding down the Shift key as you draw to keep the line perfectly horizontal, of course). However, graphical lines have a way of not always staying where you put them, so you'll usually find that it's much more efficient and predictable to just use a leader line.

Tip

To create a signature or other fill-in area, type the prompt (Name:, Phone:, etc.). Use the tab selection tool to choose a right tab, and then click on the horizontal ruler line where you want the fill-in line to end, to insert a right-aligned tab. Double-click the tab you just created. In the Tabs dialog box, choose Leader option 4 (solid underscore), and click OK. This creates something like what is shown in Figure 8-12. (If you accidentally insert a new tab when you tried to double-click, make sure you zap it while visiting the Tabs dialog box.) ■

FIGURE 8-12

Tab leader lines are ideal for creating underscored fill-in areas for paper forms.



Incidentally, using a table, you can create a fill-in area that looks identical to that one. Create a table with one row. Size it so that Name: is a narrower column and the second column ends where you want the fill-in area to end. Next, use the Borders tool to turn off all borders in the table. Finally, use the Bottom Border tool to turn on just the bottom border in the second column's cell. For me, however, this is a lot more work just to prove a point.

Another situation in which tabs give you what you want is with simple document headers. The default header for Word 2010 documents contains a center tab and a right-align tab. This enables you to easily create a header with text to the left, centered text, and right-aligned text, simply by separating those three components with tabs. Tabs also can be useful inside actual tables for aligning numbers at the decimal point. (As noted earlier, to insert a tab inside a table, press Ctrl+Tab.)

However, for more complex presentations of information, particularly when you might need organizational control (copying and moving rows and columns), it's much better and much more natural to use a table.

Paragraph Decoration

A second kind of paragraph formatting is something that might be termed *paragraph decoration*. This includes shading, boxes, bullets, and other semi-graphical elements that help the writer call attention to particular paragraphs, or that help the reader understand the text better.

Numbering/Bullets

Numbering in Word has always been a bit of a sore point. That's because historically, it has proven to be both confusing and fraught with odd quirks. Let's pretend for the moment that numbering and bullets work perfectly and never give the user grief. To make that assumption pass the Sarcastic Giggle Test, let's assume we're using the Word 2007/2010 `.docx` format, rather than Word 2003's (or earlier) legacy `.doc` format.

You can apply numbering or bullets simply by clicking the Numbering or Bullets tool in the Home ribbon. You can click the Numbering or Bullets tool and just start typing. When you're done with your list, simply press Enter twice.

Note

If Automatic bulleted lists or Automatic numbered lists are enabled, then you don't even need to click the Numbering or Bullets tool. To begin a numbered list, simply type 1. and press the space bar, and Word automatically replaces what you typed with automatic number formatting. Other variations work, too, such as 1<tab>. To begin a bulleted list, simply type * and press the spacebar. When you want to end either kind of list, press Enter twice. ■

You can also apply numbering or bullets to an existing list. Just select the list and click either tool. If the list has levels (for example, created by a tab press before certain sub-items), then the Numbering tool uses different and appropriate numbering schemes for each level.

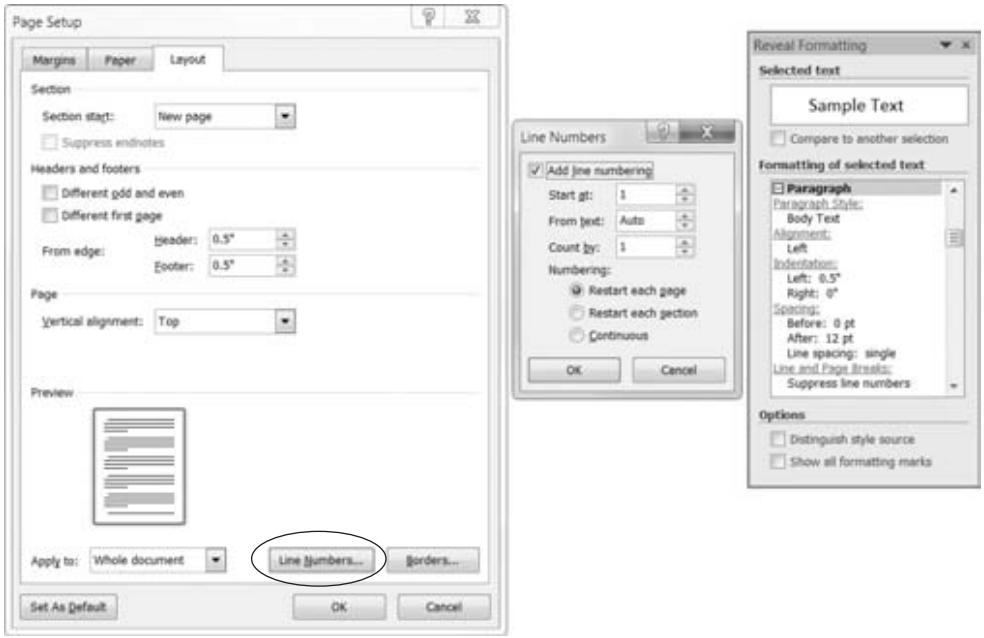
Note that Bullets and Numbering both offer live preview of the resulting list. Multilevel List, however, does not.

Line Numbering

Line numbering, which is different from numbered lists, often is used in legal documents such as affidavits. The numbering allows for ready reference to testimony by page and line number. Line numbering itself, however, is not a paragraph-formatting attribute. It is a section-formatting attribute. Line numbering is turned on with the Line Numbers tool in the Page Layout ribbon, or the Line Numbers option in the Layout tab of the Page Setup dialog box, shown in Figure 8-13.

FIGURE 8-13

Line numbering is a section-formatting attribute, but it can be turned off in any given paragraph.

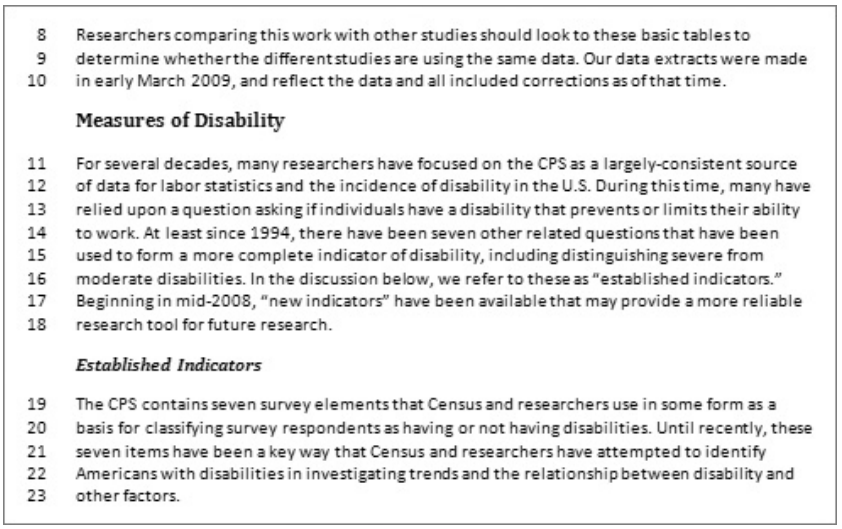


So why am I talking about line numbering here if it's not a paragraph-formatting attribute? I'm talking about it here because although line numbering isn't a paragraph attribute, suppressing line numbering *is* a paragraph attribute, as shown in Figure 8-14. (Note that line numbers do not display in Draft or Outline views.) Here, I've also displayed the Reveal Formatting pane so that you can see that Suppress Line Numbers is indeed a paragraph-formatting attribute.

To suppress line numbering in any given paragraph, put the insertion point in that paragraph, display the Paragraph dialog box (double-click any of the indent controls on the horizontal ruler), and enable "Suppress line numbers" in the Line and Page Breaks tab, as shown in Figure 8-15.

FIGURE 8-14

While line numbering is a section-formatting attribute, the ability to suppress it is a paragraph attribute.



Additional Paragraph Controls

Figure 8-15 shows additional paragraph-level formatting controls:

- **Widow/Orphan control:** Prevents a solitary paragraph line from being "stranded" on a page all by itself (widows precede the main portion of the paragraph, while orphans follow it).
- **Keep with next:** Forces a paragraph to appear with the paragraph that follows. This is used to keep headings together with at least the first few lines of the first paragraph under that heading. It is also used to keep captions and pictures, figures, tables, and so on, on the same page.
- **Keep lines together:** Prevents a paragraph from breaking across two pages.
- **Page break before:** Forces an automatic page break before the paragraph. This often is used to force each chapter to begin on a new page.
- **Don't hyphenate:** Instructs Word not to perform hyphenation in a given paragraph. This often is done by those trying to reproduce a quote and maintain its integrity with respect to the words and position of the original being quoted.

Shading

Paragraph shading, as well as shading of individual words, can be performed graphically with live preview via the Shading control in the Home ribbon, shown in Figure 8-16.

Additional shading options can be viewed in the Shading tab in the Borders and Shading dialog box. In addition to color shading, you can also choose to apply patterns. Patterns often are more useful when you're preparing documents for grayscale printing in which shading variations might

be too subtle. To display the Borders and Shading dialog box, click the drop-down arrow next to the Border tool in the Home ribbon, and select Borders and Shading (at the bottom of the list).

Confusion Alert

Note that the Border tool changes to the last border option you picked using the drop-down arrow. Therefore, if the last option you picked was Borders and Shading, that's what the main Border tool becomes (for now, anyway).

FIGURE 8-15

Line numbers can be suppressed on a paragraph-by-paragraph basis.



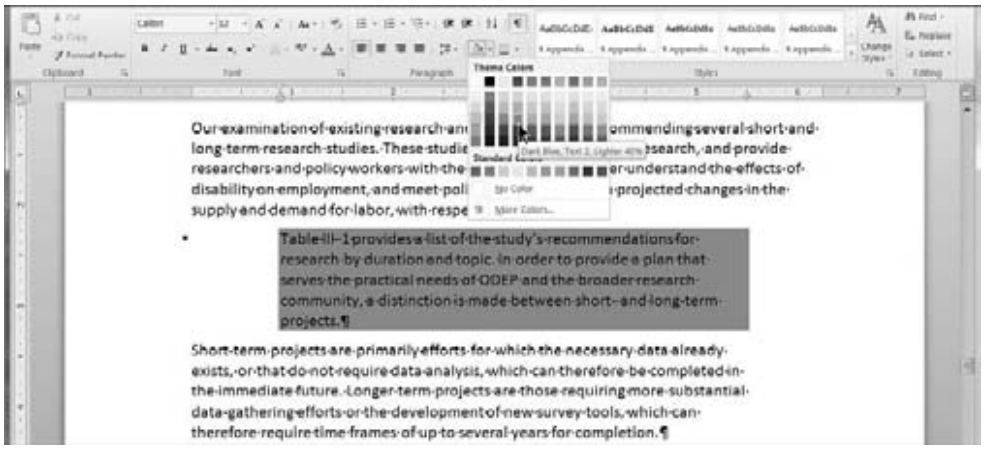
What's That Dot?

In Figure 8-16, notice the square dot to the left of the shaded paragraph. That dot has nothing to do with the shading or with the fact that that paragraph is selected. The square dot appears to the left of a paragraph when any of the following attributes are assigned to that paragraph:

- Keep with next
- Keep lines together
- Page break before
- Suppress line numbers

FIGURE 8-16

When nothing is selected, shading is applied to the whole paragraph. Unlike many other paragraph-formatting attributes, shading can be a character-formatting attribute as well.



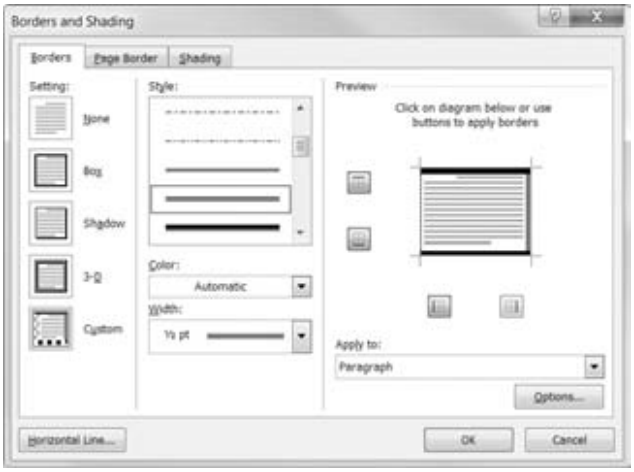
These options can all be found in the Line and Page Breaks tab of the Paragraph dialog box, shown in Figure 8-15.

Borders and Boxes

Some call them borders; some call them boxes. I call them. . .borders and boxes. Unlike shading, Borders does not provide live preview. You can choose from the Border control's drop-down options, or you can instead select the Borders and Shading option at the end of the drop-down list to display the dialog box shown in Figure 8-17.

FIGURE 8-17

The Borders and Shading dialog box provides complete control over a paragraph's border.



Because the drop-down doesn't provide live preview, I often find working in the dialog box to involve a bit less trial and error. The basic technique is to choose a box/border design (Box, Shadow, or 3-D), and then customize as you see fit. You can click the boxes or the borders in the Preview area to turn individual sides on or off. By alternately clicking Style, Color, or Width and the line segments you want to format, you can even create a box with four completely different sides. (Did I fail to mention that this chapter is about formatting, not tacky design?)

Additionally, you can adjust the distance between the border and paragraph text by clicking Options in the lower right corner of the dialog box. You can individually adjust the distance for any of the four sides.

Random Bonus Tip #1 — Sort Paragraphs That Aren't in a Table

You've seen Sort in the Paragraph group and in the Table Layout ribbon, but you might not know that it works on any list — even one that's not in a table. Select the items you want sorted and click the Sort tool in the Home ribbon's Paragraph group. Or, if you're a keyboard junkie, try using the same menu keystrokes you used in earlier versions of Word (Alt+A, Alt+S).

Random Bonus Tip #2 — Move Paragraphs Easily

If you ever have two paragraphs that you need to quickly swap, don't reach for the mouse. Instead, put the insertion point into either paragraph and use Shift+Alt+Up or Shift+Alt+Down to "drag" the current paragraph up or down so that it changes places with the other paragraph. These are outlining keystrokes, but they work great for this sort of thing as well. You can also quickly move rows around in tables.

Summary

In this chapter we've explored the ins and outs of direct paragraph formatting. You should have also learned that anything you can do to a paragraph, you can enshrine in a style. You should now be able to do the following:

- Decide when to use direct formatting, and when to use a style
- Distinguish between paragraph-formatting attributes and other kinds of attributes

- Properly indent and align any paragraph, as well as determine how to find and use the appropriate tools
- Apply and remove bullets and numbering
- Use shading and boxes to highlight paragraphs
- Explain at the next cocktail party what those strange square dots are at the left side of certain paragraphs
- Decide when to use tabs versus when to use a table

CHAPTER 9

In Style!

Styles are the seat of power in Word — any version, not just Word 2010. Word 2007 introduced additional tools that make using styles for formatting more powerful and more flexible. The dizzying array of options might leave you scratching your head in wonder and amazement, but perhaps in confusion as well. In fact, much of how Word 2010 goes about its business might seem shrouded in mystery, since there are so many unfamiliar elements, particularly if you leapfrogged over Word 2007.

This chapter sorts things out, solving the mysteries, reducing the confusion, and giving you a handle on which tools to use for what. It looks at concepts and tools, such as Quick Styles and Quick Style sets, the Style Inspector, the Apply Styles task pane, and the Styles task pane. It ties these features together and shows how they relate to legacy Word 2003 tools, such as the Modify Styles dialog box and the Organizer.

IN THIS CHAPTER

The ins and outs of the Styles tool on the ribbon

Using, creating, and modifying styles

Using, creating, and modifying Quick Style sets

Managing styles

Inspecting styles

Styles Group

The most visible ribbon control for applying and changing styles is the Styles group (chunk) in the Home ribbon. Seemingly simple, the Styles group is the tip of a rather large iceberg.

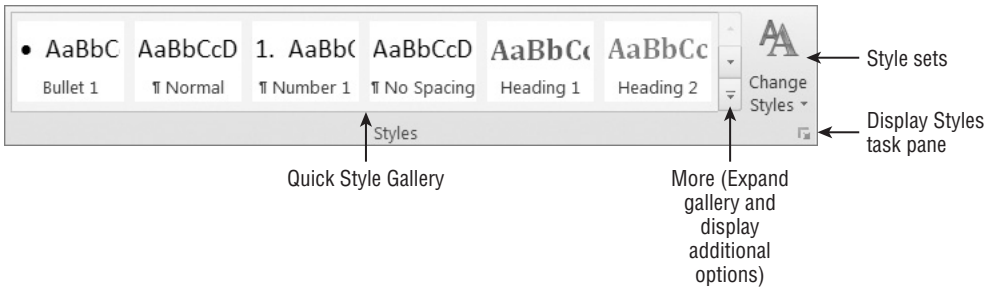
On its face are four controls, shown in Figure 9-1: the Quick Style Gallery, Style sets, Expand gallery, and the Styles task pane launcher.

Note

The word "quick" very likely will confuse many users. You might also notice that the term "Quick Style" also applies to the gallery used for SmartArt. These are not related. One way to deal with the disconnect is to think of them as different kinds of styles — one you apply to text elements; the other you apply to certain kinds of graphic elements. We will look at SmartArt "styles" in Chapter 18. ■

FIGURE 9-1

The Styles group is the command and control center for styles.



In a normal screen configuration and resolution, the Quick Style Gallery shows only three to eight styles or so. In a very high-resolution setup with a sufficiently wide monitor, it can show up to seventeen styles without your having to use the Expand Gallery control. Clicking the More button shows more of the styles in the Quick Style Gallery, as shown in Figure 9-2. If there are still more styles in the gallery, you can access them using the vertical scroll bar or by dragging the right corner control to expand or shrink the size of the gallery.

FIGURE 9-2

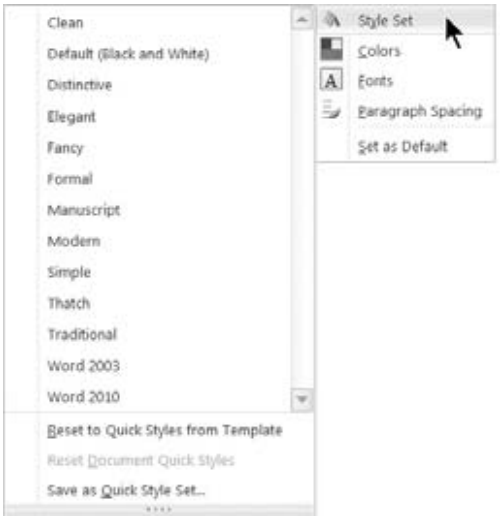
The Style Gallery can be scrolled and made larger or smaller.



The Styles group also provides access to Style Sets. If you click Change Styles you see additional toys, shown in Figure 9-3. The options shown — Clean, Default (Black and White), Distinctive, and so on, are carefully constructed sets of styles that are coordinated to help you quickly change the look of your document. (You'll see where those style sets come from later in this chapter.)

FIGURE 9-3

Style Sets offer additional coordinated styles to help you achieve a different ''look'' for your documents.



Notice also the Colors and Fonts controls. These tools work with themes, which aren't the same thing as styles. Like style sets, themes can be used to dramatically change the appearance of your document. Unlike style sets, however, they are tied to the use of theme elements in your document. One way to think about themes is as design elements that affect the aesthetic appearance of a document. Styles, on the other hand, are geared more to the formatting of text and paragraphs.

Note

Themes were a feature new to Word 2007, and do not work with compatibility mode documents. In the Change Styles list, Style Set is available, but Colors and Fonts are not. These features are available, however, not only when you're working with `*.docx` documents, but also when you're working with web-oriented documents (`*.mht`, `*.htm`, `*.html`, etc.). Themes are explored in Chapter 25. ■

The effect of different style sets — indeed, seeing any effect at all — depends on your having used styles in your document. If you simply use the style Normal, then at most applying a new Style set will change the font. For maximum benefit from Word's style features you need to lay the proper foundation, which means using styles to differentiate different kinds of text (headings, body, captions, etc.).

Using Styles

When you first start typing in any Word document, you're automatically using the default style. Ordinarily, that would be Normal.

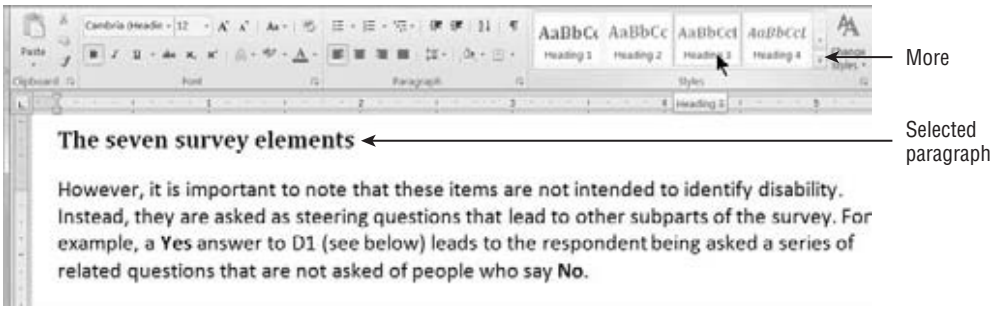
Note

The style named Normal is wholly independent of the Word template named `Normal.dotm`. `Normal.dotm` contains many different styles, and one of them happens to be named Normal. In fact, every Word template contains a style named Normal. This is nothing more than an unfortunate, confusing, and creativity-challenged choice of names. They could have named Word's default style Base or Body, and I really wish they had. It would make notes like this one unnecessary. Fortunately, Normal view was renamed Draft view as of Word 2007, so at least we no longer have to deal with that added bit of confusion. ■

As you type different parts of any document, you should consider applying an appropriate style. For example, if you type a heading, consider applying a heading style to it, such as Heading 1, 2, or 3. To do this, click the heading style in the Quick Style Gallery, as shown in Figure 9-4. If Heading 1 isn't showing, click the More button to the right of the Styles, also shown in Figure 9-4.

FIGURE 9-4

Click a style in the Quick Style Gallery to apply it to the current paragraph or selection.



Apply Styles Task Pane

If you're accustomed to Word 2003 or earlier, you can also apply a style in a way that's similar. In Word 2003 you could either click in the Style drop-down tool or press Ctrl+Shift+S. There is no default Style drop-down in Word 2010, but Ctrl+Shift+S activates the Apply Styles task pane, shown in Figure 9-5. Once the Apply Styles task pane is visible, it can be used much like Word 2003's Style tool.

FIGURE 9-5

Press Ctrl+Shift+S to activate the Apply Styles task pane, which is Word 2010's substitute for pre-ribbon Word's Style tool in the Formatting toolbar.



Tip

In the preceding paragraph I said there is no *default* Style drop-down tool. There isn't. However, there is one you can add to the Quick Access Toolbar — it is the "classic" Style drop-down tool that appeared in the Formatting toolbar in Word 2003 and earlier. Unfortunately, you can't assign a keystroke to it, but you can at least use it for setting the style using the mouse. More importantly, it displays the style assigned to the insertion point all the time, unlike the Quick Style gallery.

To add this tool to your QAT, right-click the QAT and choose Customize Quick Access Toolbar. Set Customize Quick Access Toolbar to For All Documents (default). Set "Choose commands from" to "Commands Not in the Ribbon." Click in the list of commands and tap the T key. This displays the first command starting with T, but also exposes all the commands beginning with "Style." Click on the command named just Style. When you hover the mouse over it, the tooltip says "Style (StyleGalleryClassic)." With Style selected, click Add to add it to the QAT. Click OK, and you're done. ■

Creating and Modifying Styles

Often, when you use a built-in heading style, it does not suit your needs. The font or point size might be wrong, or the spacing might be off. No problem. Change it. Or, if you still need the existing style but want a slightly different version for another purpose, create a new style.

Caution

When experimenting with styles, do not experiment on the only copy of a document or template that you have. Make a copy of the document and/or template in question, and work with the copy. That way, you have a fallback position when and if you either change your mind or make a colossal formatting mistake. ■

To change an existing style, right-click the style in the Quick Style Gallery and choose Modify. This displays the Modify Style dialog box shown in Figure 9-6. Make the desired change to the style. If the formatting you need to change isn't shown, click Format in the lower left corner and choose from the seven different categories of formatting.

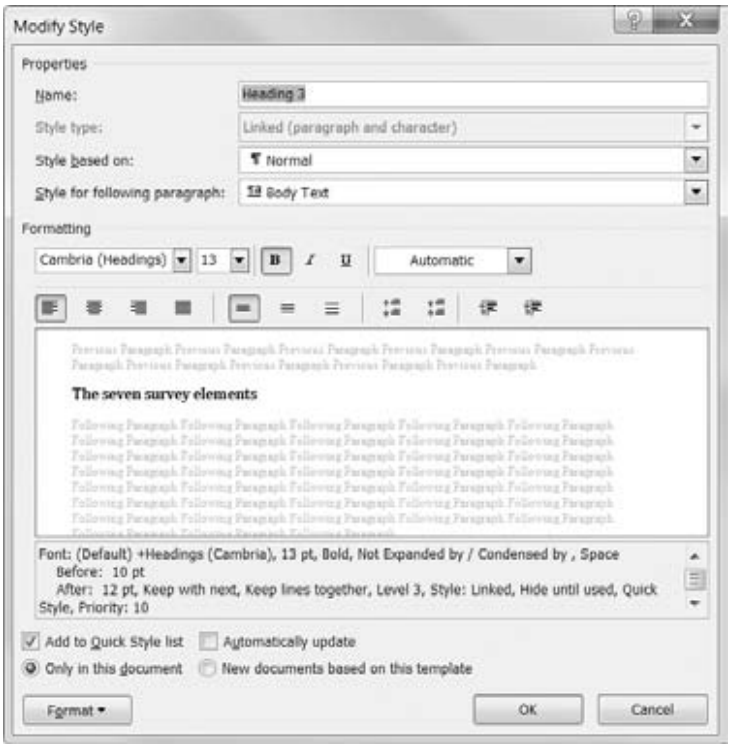
Caution

Keep Automatically Update turned off unless you absolutely need it (for example, if your company's policy requires that it be used). The Automatically Update setting can bring much joy or much sorrow. If it is enabled, when you make changes to Heading 3, for example, those changes are automatically incorporated into the style's definition. All other text in the document formatted with that style will automatically change to reflect the changes in the style's definition. If you're using styles correctly, this can bring great joy.

If, on the other hand, you've misused Body Text throughout the document, applying direct formatting in various locations to make it "look right," then you could be in for an unpleasant shock. Suppose a modified Body Text style is sometimes used on a heading, other times used for a caption, and yet other times used for other purposes. Each time you modify the Body Text style in one place, all other instances in your document also change, undoing your careful direct formatting. This can happen without your realizing it, because the updated instances may be miles away in another part of the document. By the time you see what's happening, it might be too late for a Ctrl+Z miracle. On the bright side, the Automatically Update option does not exist for the Normal style. This option was the cause of much grief in Word 2003 and earlier. Its post–Word 2003 removal from the Normal style has prevented a great many mishaps! ■

FIGURE 9-6

Use the Modify Style dialog box to make changes to a style.



While there is a special New Style dialog box you can use (available from the bottom of the Styles task pane and the Manage Styles dialog box, for example), you aren't limited to that method. In Figure 9-6, where it says Heading 3, you can type a new style name. When you click OK, the style is created!

Style-by-Example

Another way to modify a style assumes that Automatically Update is *not* enabled, and that "Prompt to update style" *is* enabled. Choose File ➪ Options ➪ Advanced, and in the Editing options section, click to enable "Prompt to update style." Assuming that Automatically Update is not enabled for a given style, you can now perform what's sometimes called *style-by-example*. We also need to assume that you're not using the Normal style, as it plays by different rules (Automatically Update doesn't work for Normal).

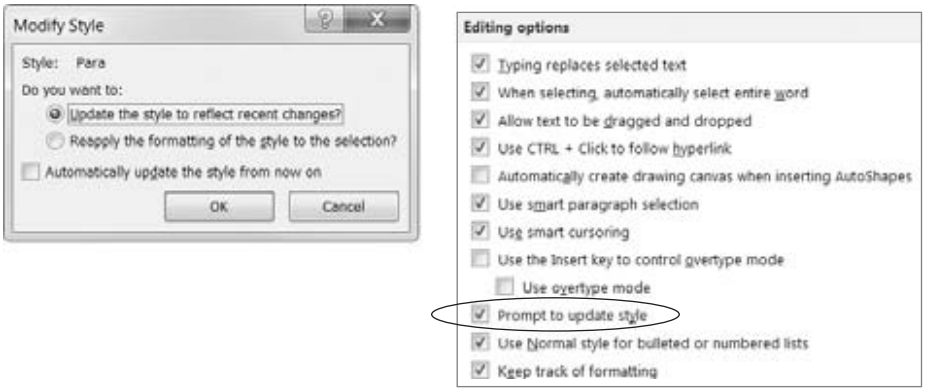
Use whatever formatting controls you like — ribbon, keyboard shortcuts, dialog boxes, and so on — to tweak text so that it looks the way you want. When you've got it looking just so, you can either create a new style or modify the current one. Note that you should modify a given style only if you want all other text formatted with that style to be formatted the same way.

To create a new style, type the new style name in the Style Name box in the Apply Styles task pane, and then press Enter to apply it.

To modify the existing style, click Reapply on the Apply Styles task pane. Or reapply the current style using some other method, such as the Quick Style Gallery or a keyboard shortcut. Word now prompts you with the dialog box shown in Figure 9-7. Note that you will never see this dialog box if the current style is Normal. Normal marches to a different drummer, and is designed to resist easy changes that might have major unintended consequences.

FIGURE 9-7

The Advanced Word option ''Prompt to update style'' tells Word to prompt you when you attempt to reapply a style (other than Normal) to text that contains formatting that differs from the current style's settings.



Choose the Update option to redefine the current style according to the formatting in the current selection (that's what "recent changes" really means — it doesn't mean "changes made in the last week or two"). The Reapply option will undo your direct formatting and reapply the original style. Note that "Automatically update the style from now on" enables the Automatically Update checkbox in the Modify Style dialog box. Think long and hard before you ever check that checkbox!

Another way to perform style-by-example is to use the RedefineStyle keyboard assignment trick. You learned about it in Chapter 4, "Making Word Work for You." This assignment, however, doesn't require that the "Prompt to update style" option be enabled.

Caution

Furthermore, RedefineStyle works on the Normal style! This can be good or bad. Consider, for example, that many styles are based on Normal. If you change the font, for example, every style that gets its font definition from Normal changes too. If you change the Before or After spacing, the indentations, the alignment, etc., then every style that inherits those attributes from Normal will also change. Only rarely will that be exactly what you want. ■

Quick Style Sets

Quick Style sets are a potentially confusing weapon in Word's formatting arsenal. Quick Style sets get their information from a set of .dotx (not macro-enabled) templates. In the Styles section of the Home ribbon, choose Change Styles ➪ Style Set and look at the names: Clean, Default (Black and White), Distinctive, Elegant, and so on.

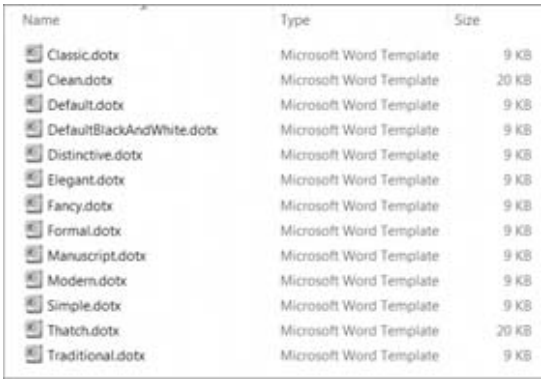
These sets correspond to .dotx files stored in C:\Program Files\Microsoft Office\OFFICE14\1033\QuickStyles, as shown in Figure 9-8.

Note

These .dotx files contain no text or other formatting, but only style information for 135 built-in styles that Microsoft's designers chose to include (no, this is not the entire list; a few notable missing styles are footnote, endnote, header, and footer, which come from the underlying document template, rather than from the Quick Style set). To see a list of these styles, copy one of the .dotx files to another file and give it an extension of .zip. Using the technique described in Chapter 5, drill down to the word folder and take a look at styles.xml. ■

FIGURE 9-8

The Quick Style sets are stored as .dotx files and can be changed or customized by the user.



When you apply a new Quick Style set by choosing Change Styles ➪ Style Set and clicking one of the displayed sets, Word replaces the style definitions in the current document with those contained in the corresponding .dotx file. It effectively overlays a new document template over what you're already using (even though the name of the underlying document template does not change). All *style-formatted* text that uses any of the styles in the replaced Quick Style set is affected.

I emphasize *style-formatted* because if paragraphs have direct formatting applied, that formatting will not be overridden. Only the attributes of the selected text that are applied through a

style are changed. For example, if you manually change the alignment of a series of paragraphs from centered to left-aligned, any alignment formatting in a Quick Style set you apply will be ignored.

Modifying and Creating Quick Style Sets

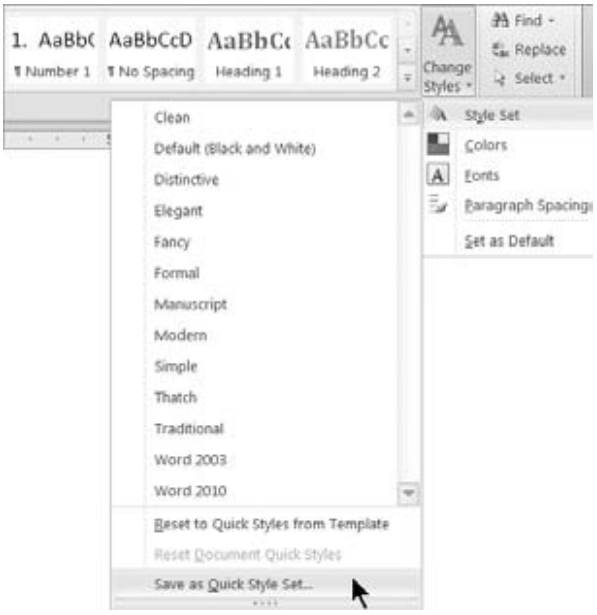
Quick Style sets are not carved into stone. You can modify the ones that Microsoft provides, and you can create your own.

You should modify the ones that Microsoft provides, by the way, only when a built-in Quick Style set's original form is something you wouldn't be caught dead using. While you can recover the original, it's easier to simply use a different name, such as Classic Bert, so you recognize the variation as your own (assuming your name is Bert).

To easily modify a set that Microsoft provides, open a document that is affected by a Quick Style set, and apply the style set you want to use, using Change Styles ➪ Style Set. Next, modify any styles you want changed. Finally, choose Change Styles ➪ Style Set ➪ Save as Quick Style Set, as shown in Figure 9-9.

FIGURE 9-9

You can modify the built-in Quick Style Sets or add your own.



In the Save Quick Style Set dialog, specify the name of the built-in set you want to modify or override. Suppose, for example, that you want a custom version of the Elegant Quick Style Set. In the File Name field type **Elegant** (you don't need to type the `.dotx` extension). Note that this will not actually modify or overwrite the original file. Then click Save. Or, to create your own Quick Style Set, type a new name (such as **My Elegant**) and choose Save.

If creating your own style set named Elegant doesn't overwrite Word's version, then how does Word know to use yours instead of its own? As indicated earlier in this chapter, Word keeps its own Quick Style sets in one of the Microsoft Office Program Files folders. It saves *your* Quick Style sets, however, to the `C:\Users\Herb\AppData\Roaming\Microsoft\QuickStyles` folder. When you display the Quick Style sets list by choosing Change Styles ➪ Style Set, Word builds the list from a combination of the user folder and its "own" folder, giving priority to any user-created Quick Style set names that are the same as any Quick Style set names that ship with Word.

To revert to a Quick Style set that comes with Word, simply delete or rename your own. In general, however, you increase your options by not giving your Quick Style sets the same names as those that come with Word.

Tip

Do you have customized styles in your `Normal.dotm` file? (If you don't know, then this tip does not apply to you.) If so, before working with Quick Style sets, protect your original `Normal.dotm` Quick Style set by saving it as a unique Quick Style set. To do this, press Ctrl+N to create a new document window based on `Normal.dotm`. Choose Change Styles ➪ Style Set ➪ Save as Quick Style Set. In File Name, choose a name that's unambiguous, such as `My normal.dotm quick styles`. ■

Changing Your Mind

If you've been experimenting with Quick Style sets but now want to revert either to the document's own styles or to those othe underlying template, you probably can (if you made a backup copy of the document and/or template, as suggested earlier, then there's no "probably" about it).

Using the built-in Reset method, for you to be able to revert to the document's own original styles, the document must not have been saved and closed. Even when the document has been saved, you often can revert to the document's original styles as of when the document was opened by pressing Ctrl+Z (Undo) repeatedly until it stops doing anything. However, if you have done a lot of editing, you sometimes cannot Undo all the way back to the beginning of the editing session.

Assuming you have not yet saved the document, to revert to the document styles that were in effect at the beginning of the current editing session, choose Change Styles ➪ Style Set. Click Reset Document Quick Styles, highlighted in Figure 9-10.

To be able to revert to the styles of the underlying template, you must not have saved Quick Style set changes to the underlying template. Otherwise, reverting won't do anything other than reapply styles that are already in effect. Unlike in the document itself, where a mere save doesn't

prevent you from being able to go back to square one, a mere save to the underlying template *does* commit the style changes. If you did that, see the tip at the end of the preceding section.

FIGURE 9-10

As long as the current document hasn't been saved and closed since the last Quick Style set change, you can revert to the document's original set of Quick Styles.



Assuming that you haven't saved a Quick Style set to your current document template, you can revert to its styles. Choose Change Styles ➪ Style Set ➪ Reset to Quick Styles from Template (refer to Figure 9-10).

Styles Task Pane

Conceptually, the Styles task pane is the replacement for Word 2003's Styles and Formatting task pane. Shown in Figure 9-11, the Styles task pane provides some of the same functionality, but not all. It also offers some functionality that Word 2003's earlier task pane didn't have.

Note

In Figure 9-11, notice that styles have three kinds of icons next to them: ¶, a, or ¶a.

The ¶ means that it's a paragraph style only. You cannot apply it to only part of a paragraph, and you can apply it by placing the insertion point anywhere in the target paragraph.

The a icon means that it's a character/text style. It is applied only to selected text. You can apply it to a single word (assuming that "When selecting, automatically select entire word" is enabled in the Editing

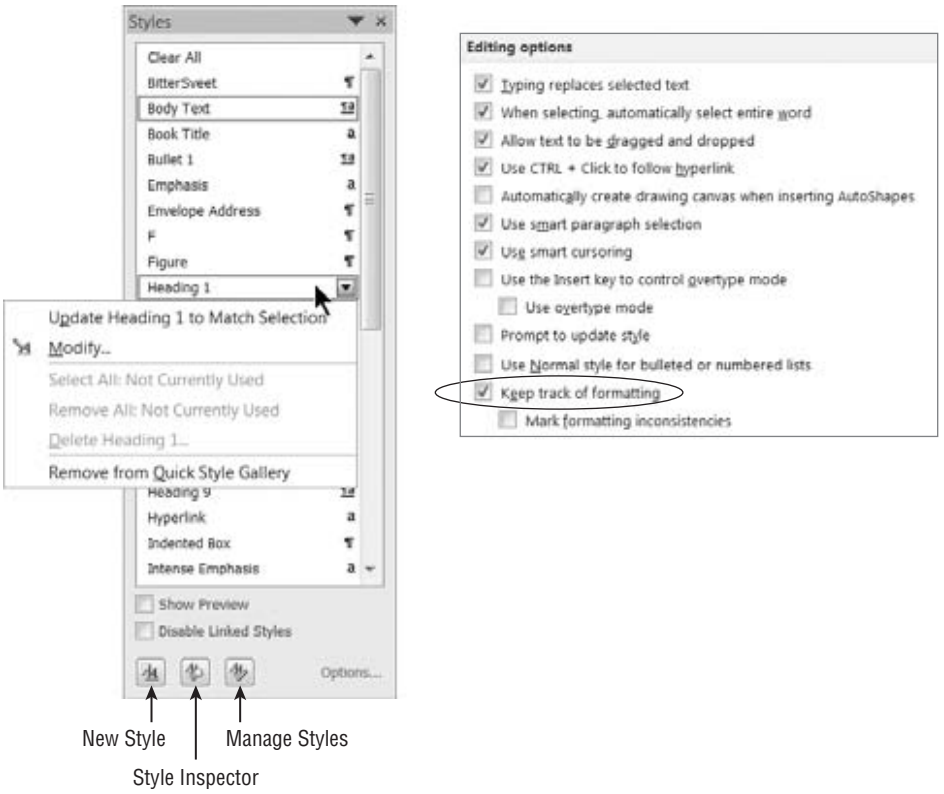
Options section of Word Options — accessed using File ➪ Options). You can also apply it to a single character or an entire document.

The ¶a icon means that the style can be used as either a character style or a paragraph style. If nothing is selected or if parts of two or more paragraphs are selected, the style is applied to the entire paragraph(s) touched by the selection. If only part of a single paragraph is selected, the style is applied only to selected text.

Does this mean that Heading styles, which use ¶a, can be applied to something less than a full paragraph? You betcha! This can be exceedingly useful when you want to include headings at the beginning of paragraphs, particularly when you want to save vertical space in the document. This is not a new feature, by the way; you could do it as far back as Word 2000. ■

FIGURE 9-11

Right-click a style in the Styles task pane for style-specific options.



The options you get when you right-click or use the drop-down arrow vary according to Word's Options settings as well as whether the selected style is built in or user-created. In Figure 9-11 the built-in Heading 1 style excludes the Delete option. You cannot delete a built-in style. You can hide it, but you can't deep-six it.

The Update option at the top of the menu appears even if the option "Prompt to update styles" is not enabled (File ➪ Options ➪ Advanced ➪ Editing options). If you have that option turned off but need the capability, the Styles task pane provides ad hoc access to it.

Two extremely useful options are Select All # Instance(s) and Remove All # Instance(s). The Remove All option is extremely useful for cleaning up a document's extraneous formatting. It does not delete the text in question. Instead, it removes the style wherever it is used, and resets the formatting of those occurrences to the default style for the current document. Ordinarily, that would be Normal.

The Select option is equally useful. To change a given style to a different style you might consider using Find and Replace. Indeed, that is an option. However, it's not necessary. Click Select All # Instances, and then click the desired style in the Styles task pane. Or, once the instances are selected, use manual/direct formatting to "sculpt" the text just the way you want it, and then choose New Style at the bottom of the Styles task pane.

Note

In Figure 9-11, why would Select All and Remove All say Not Currently Used when the style is in fact in use? This is an artifact of a Word Options setting. Choose File ➪ Options ➪ Advanced tab ➪ Editing section and click to disable "Keep track of formatting." Now Select All and Remove All will work. The problem stems from the way in which Word keeps track of formatting, which it does by making tiny incremental changes to the underlying style. The result is that when "Keep track of formatting" is used, Word disallows the Select All and Remove All features. ■

Remove from Quick Style Gallery does not remove the style from the document. Instead, it removes the style from the Quick Gallery listing of styles. If the style is not currently in the Quick Style Gallery, the command in the pop-up will be Add to Quick Gallery instead.

Manage Styles

Another option available from the Styles task pane is the Style Manager button. Shown in Figure 9-12, Manage Styles is your master control and Grand Central Station for styles. Use this dialog box to create, modify, and (if they are user-created) delete styles.

Use the manager also as a launch pad for the Organizer, via the Import/Export button, which enables you to copy styles between different templates and documents, as well as to rename and delete styles. (Again, only user-created styles can be deleted.)

Recommended Styles

The Recommend tab, shown in Figure 9-13, controls which styles show up on the list of recommended styles. The "recommended" option shows up in each of the style-related task panes, and applies to the styles that are displayed in the Quick Style Gallery. For any style you can choose to Show, "Hide until used," or Hide. It's a great way to focus the options when you want to exercise strong control over document formatting. It's better than a whip!

FIGURE 9-12

Manage Styles gives you complete control over styles.



FIGURE 9-13

Use the Recommend tab to control what styles show up when you restrict style controls to displaying ''recommended'' styles.



In the recommended list of styles, you can apply your changes one at a time or by using standard Windows selection techniques to select multiple styles. Note the Select All and Select Built-in buttons, too, which enable you to quickly distinguish between Word's standard styles and user-created styles.

Use the Move Up/Move Down/Make Last/Assign Value tools to determine the recommended order. You can even alphabetize them, if that makes more sense to you!

Restricted Styles

You've heard of the style police? Well, grab your badge! For even stronger style enforcement, the Restrict tab lets you restrict which styles can be used. This is a good tool for designing templates and forms in which you want extremely tight control over the formatting of content. It's also useful in setting up training classes for Word, when you might want to tame the options a bit to avoid overwhelming the novice user.

Additionally, if you want to enforce the use of only styles — and not direct formatting — the restricted styles capability provides a way to do it. Use "Limit formatting to permitted styles," shown at the bottom of Figure 9-14, to accomplish this feat. This can be useful when you're setting up forms and templates for specific tasks for which the resulting document formatting must adhere to strict requirements.

FIGURE 9-14

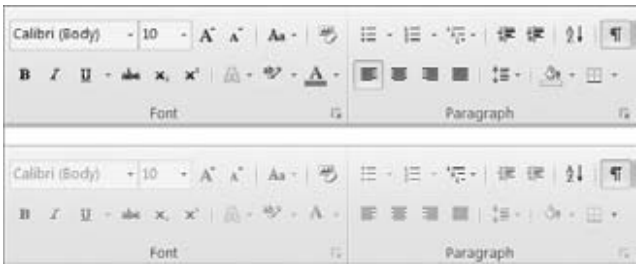
The Restrict tab enables you to make direct formatting off-limits.



By restricting formatting only to certain styles, you effectively prevent the use of direct formatting tools. As shown in Figure 9-15, when formatting is restricted to Normal and Heading 1 through Heading 5, most of the ribbon Font and Paragraph controls are dimmed as unavailable.

FIGURE 9-15

In this scenario, formatting is limited to Normal and Headings 1 through 5, which puts the Font and Paragraph direct-formatting controls off-limits.



Unrestricted formatting

Formatting restricted to permitted styles

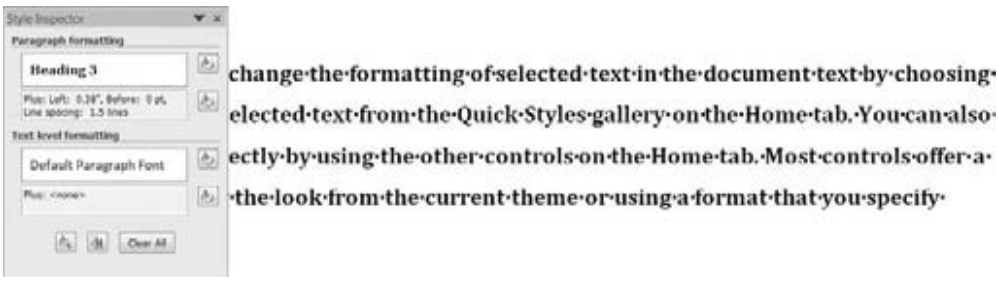
Note that not only can you limit formatting only to permitted styles; you can also block Theme and Quick Style switching. If you want to tame "artistic" tendencies of users whose mission statement doesn't include using up all the colored ink or toner, this provides an avenue of attack. Did I mention that this stuff is better than a whip?

Style Inspector

The Style Inspector enables you to quickly determine whether the current formatting is applied wholly through a style, or whether direct formatting is in effect. In Figure 9-16, notice that under the paragraph and text (character) styles there is a box with the word "Plus." In the lower panel it says "Plus: <none>," which indicates that no direct text/character formatting has been applied. In the upper panel, however, it shows that left alignment has been applied directly, along with a left indent of .38″ and line spacing of 1.5 lines. In the current mystery, it appears that someone mistakenly applied the Heading 3 style to regular body text, and then tried to compensate using direct formatting.

FIGURE 9-16

The Style Inspector can help you diagnose formatting ailments.



Summary

In this chapter we've explored a variety of features. You now know how to apply Quick Styles, how to choose and modify Quick Style sets (as well as create your own), and how to create, modify, and delete user-created styles. In addition, when a style can't be deleted, you now know why. You should also be able to do the following:

- Use the Manage Styles dialog box to hide and restrict styles and direct formatting
- Use Apply Styles to apply, create, and modify styles
- Use the Styles pane to quickly select all occurrences of any given style
- Use the Style Inspector to solve formatting mysteries

CHAPTER 10

The Clipboard

The Microsoft Office Clipboard has grown and expanded well beyond its original single-item facility. For those of us who began computing life in the days before GUI and Windows, this single innovation revolutionized the way we used computers. It has no doubt saved millions of pieces of scrap paper.

The clipboard is a temporary storage area you can use to transfer text, files, pictures, and other objects between different programs or different parts of a single program. You copy or cut text from one location, and then paste it in the destination location.

Windows itself has a clipboard that you can use in just about any Windows program. Like the Office 2010 Clipboard, Windows' Clipboard can be used to transfer files, pictures, sounds, text, and so on. Unlike the Office version, however, the Windows Clipboard stores only a single item at a time.

The Office 2010 Clipboard can store up to 24 items (as could that of Office XP, 2003, and 2007). Each time you add something new, it goes on top of the list. When the Clipboard reaches 24 items, adding another item causes the oldest item to disappear.

When you use the ordinary Paste command (Ctrl+V or Paste in the Home ribbon), you access the most recent item, which is at the top of the list. You also get the most recent item when you use Paste in a non-Office program.

Using the Office Clipboard task pane, however, you're not limited to the top item in the list. You can access any of the (up to) 24 items in the Office Clipboard.

IN THIS CHAPTER

Using the Office 2010 Clipboard

Windows Clipboard versus the Office Clipboard

The Clipboard task pane

Managing Clipboard items

Paste Special

Alternatives to the Clipboard

Note

For the Clipboard to collect up to 24 items, either the Clipboard pane must be displayed, or the Collect Without Showing Office Clipboard option must be enabled. To enable this option, display the Clipboard pane (by clicking the Clipboard launcher in the Clipboard section of the Home ribbon tab) and click the Options drop-down button at the bottom of the pane, then click to check Collect Without Showing Office Clipboard. ■

The Clipboard can contain all kinds of things — graphics, text, spreadsheet cells, PowerPoint slides, Word documents, sounds, and more. If there is an upper limit on the size of any given Clipboard item in Windows 7, I haven't found it.

The Office Clipboard, however, is not fully integrated into Windows itself. Each new copy or cut is added to the Office Clipboard, regardless of the program in which the copy or cut is performed. Only Office programs (and not all of those), however, can access all items in the Clipboard. As indicated, non-Office programs such as Notepad and Internet Explorer, for example, can access only the "top" item.

While it might be nice to copy a series of distinct items from the Clipboard into a series of fill-in fields in Internet Explorer, it's not (yet) possible. For that capability you would need to explore the wonderful world of Windows add-ons, or venture into the future.

Using the Clipboard

To use the Clipboard with the keyboard, select the text or other object you want to copy or move, using standard Windows selection techniques. Then press Ctrl+C (Copy) to copy text, or press Ctrl+X (Cut) to move text. Use the cursor keys or other navigation keys to move to where you want the text copied or moved, or select what you want replaced. Then press Ctrl+V (Paste).

You should also know that the three main Clipboard keystrokes are redundantly assigned to legacy keys: Ctrl+Insert for Copy; Shift+Insert for Paste; and Shift+Delete for Cut.

Note

Cut works only in editable windows. If you try to cut text from a normal Internet Explorer window, for example, it won't work. You can't "cut" that 105° from the Weather Channel's forecast. If it's an editing window, such as a fill-in text area or a blogging composition window, then you likely can cut text for use elsewhere, or for moving around in the same editing window. ■

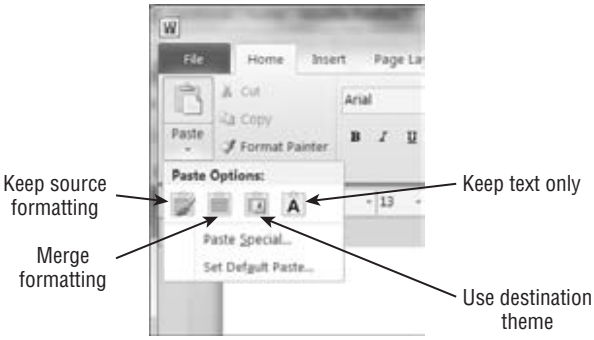
To use the Clipboard with the mouse, select what you want to copy, right-click the selection, and choose Copy or Cut. Click where you want the text to go, or select the text you want to replace. Then right-click and choose Paste.

If you're more comfortable using Clipboard icons or tools, the traditional Clipboard tools are available in the Clipboard section of the Home ribbon, as shown in Figure 10-1. Select what you want to copy, click the Cut or Copy button, move to the desired location (or select what

you want replaced), and click Paste. Note that the Paste button has an upper portion and a drop-down menu. To perform the default paste operation, click the upper portion of the button.

FIGURE 10-1

Clipboard tools are available by clicking the Paste dropdown button in the Home ribbon tab.



Tip

What do you do if the Home ribbon isn't active when you need the Clipboard? You can add it to the QAT. To add the entire Clipboard group, right-click the word "Clipboard" and choose Add to Quick Access Toolbar. To add just Cut, Copy, or Paste, right-click the individual button(s), and choose Add to Quick Access Toolbar. ■

"Clipboard" refers not only to the storage location, but also to the Clipboard task pane, shown in Figure 10-2. Shown here, the Clipboard task pane contains an Outlook message, a URL and picture from Firefox, some cells from an Excel spreadsheet, and a picture from Word.

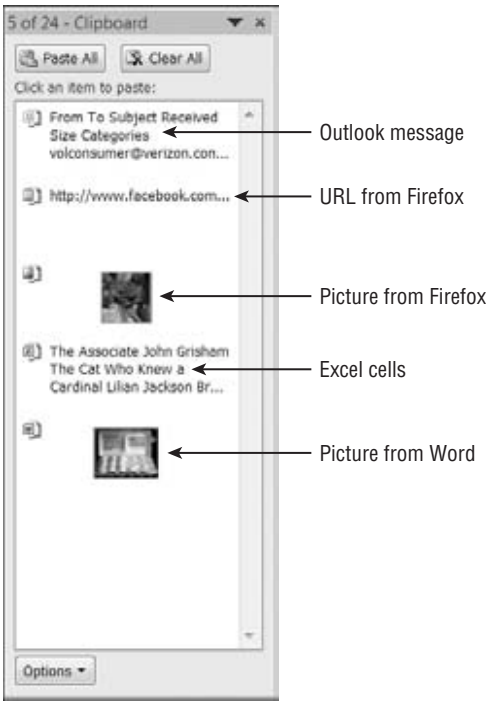
Paste Option Buttons

In Figure 10-1, notice the four buttons above Paste Special. The paste option buttons, introduced in Word 2010, are designed to provide a visual way for you to see what each paste option will accomplish. I don't know about you, but the pictures are not terribly meaningful to me — even after I've been using Word 2010 for months. Be that as it may, they do provide ready access to often-needed paste options — particularly the "Keep Text Only" option.

They also come with another benefit — dedicated commands! Inveterate customizers will be delighted to know that each of these buttons has its own dedicated Word command. This means that you can assign these directly to keystrokes. I showed you how to take advantage of this earlier in Chapter 4 with the example of assigning PasteTextOnly to a keystroke. Additional direct commands — all new in Word 2010 — include PasteDestinationFormatting, PasteDestinationStyle, PasteDestinationTheme, and PasteMergeList. All in all, 32 new paste commands were added in Word 2010!

FIGURE 10-2

If the Office Clipboard task pane is open, anything copied or cut in Windows is added to it.



Set Default Paste

Another wrinkle added in Word 2010 is direct access to the settings for default paste. The ability to set the default paste behavior is not new in Word 2010 — it existed in 2007 as well. All that is new in 2010 is more direct access to the option. Referring to Figure 10-1, note the Set Default Paste option. This opens File ➪ Options ➪ Advanced to the Cut, Copy, and Paste section. Among other things, these options will let you set your default paste to Keep Text Only — if desired. Or, as shown in Chapter 4, you can have a dedicated keystroke to paste unformatted text.

Paste Special

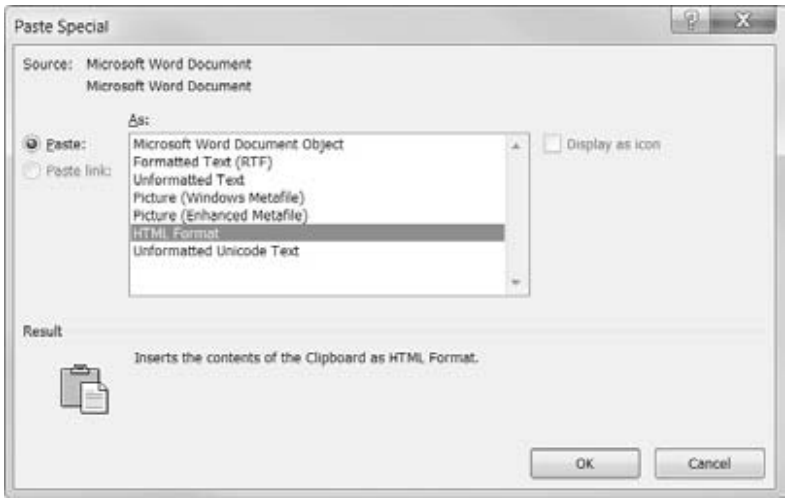
Referring to Figure 10-1, notice the Paste Special option. Paste Special options offer alternative ways to interpret the top item in the Clipboard. With formatted text copied from Word to the Clipboard, typical options are shown in Figure 10-3.

Note

Paste Special can still be accessed with the legacy keystrokes Alt+E, S (which accessed Edit ➪ Paste Special in Word 2003's menu). It also is assigned to Alt+Ctrl+V, which you might find easier and more direct. ■

FIGURE 10-3

A formatted text Clipboard item from Word offers some perhaps unexpected options, such as Paste As Picture.



Paste inserts the item in the format indicated at the insertion point. Paste Link creates an OLE bookmark around the selected text or object and inserts a LINK field code with a reference to the document name and bookmark where the source is located. You'll learn more about the LINK field in Chapter 21. Bookmarks are covered in Chapter 32.

If the source is ever deleted or otherwise unavailable when the document that contains the link is updated, Word will indicate that the source cannot be found, and the update will fail. This, of course, is a lot better than replacing the displayed item with an error message.

Caution

If you notice stray bookmarks with names like OLE_LINK3 in your document, don't delete them without considering the possible consequences. If you know where the one in question came from and still want to delete it, that's fine. If its existence leaves you scratching your head, leave it alone, as something else in that document or another document probably depends on its presence there. ■

The Clipboard Task Pane

By default, if the Office 2010 Clipboard is open (i.e., if any Office 2010 program is running), then each time you copy or cut something in Windows, it is added to the Clipboard, regardless of the program of origin. This does not require that the Clipboard task pane be displayed. If no Office 2010 program is running, then Clipboard operations revert to Windows' own one-item Clipboard.

I said "by default" because this behavior can be changed. Display the Clipboard task pane by clicking the Clipboard launcher in the southeast corner of the Clipboard group on the Home ribbon. Click the Options button to display the options shown in Figure 10-4. The function of each option is described in Table 10-1. If the third option is not checked, the Clipboard pane must be displayed for collection to occur.

While the second option indicates that two presses of Ctrl+C causes the Clipboard to appear, that's not always the case. If no text is selected the Clipboard won't appear. If text is selected, sometimes just a single press of Ctrl+C will cause the Clipboard to show.

FIGURE 10-4

You can prevent the Office Clipboard from appearing automatically.

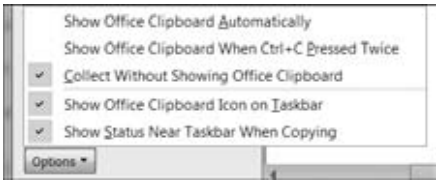


TABLE 10-1

Clipboard Options

Show Office Clipboard Automatically	Automatically displays the Office Clipboard when you copy items using the mouse, keyboard, or ribbon tools
Show Office Clipboard When Ctrl+C Pressed Twice	Automatically displays the Office Clipboard when Ctrl+C is pressed twice (and sometimes just once) while a copyable item is selected
Collect Without Showing Office Clipboard	Automatically adds items to the Office Clipboard even if the Clipboard is not displayed
Show Office Clipboard Icon on Taskbar	Show the Office Clipboard icon in the notification area of the Windows taskbar when the Office Clipboard is active; the icon may be hidden
Show Status Near Taskbar When Copying	Displays a message near the Windows notification area when you copy or cut items to the Office Clipboard

Pasting from the Clipboard Task Pane

In addition to pasting using the Paste tool, pop-up menu, and keystroke, you can also paste from the Clipboard task pane. You can paste all the items from the Clipboard, or you can paste a single item.

To paste the entire contents of the Clipboard, move the insertion point to or select where you want the pasted item(s) to go, and choose Paste All at the top of the task pane.

To paste a single item from the task pane, move the insertion point to or select where you want the pasted item(s) to go, and then click the item in the task pane. You can paste from any location in the queue. Unlike with Ctrl+V or the Paste tool, you are not limited to the item at the top of the list.

Removing Items from the Clipboard

Pasting from the Clipboard task pane does not affect the queue itself. To remove a single item from the Clipboard, right-click the item and choose Delete. Any items below that one in the list move up. If the most recent Copy or Cut caused a former 24th item to be removed from the list, deleting one above it will not restore that item. The Clipboard's limit really is 24 items — there is no invisible storage location for items 25 and beyond.

To empty the Clipboard, click Clear All at the top of the task pane. Another way to empty the Clipboard is to close all Office programs. Yes. That's the bad news. Office 2010 will not remember the Clipboard's items, except for the top one, after all Office programs are closed. The good news, at least for any individual Windows session, is that as long as at least one Office 2010 program remains running (such as Outlook, which many users keep open so they can receive e-mail and calendar alerts), the Clipboard's contents remain intact. After all Office programs are closed, however, the Clipboard's contents are lost. See "Copying and Moving Text without Using the Clipboard" later in this chapter for some less fragile alternatives to the Clipboard.

Tip

If you have to reboot but will need the Clipboard's contents in a later session, open a new document file and choose Paste All in the Clipboard task pane. Then save that document. Now the contents of the Clipboard, even if not actually on the Clipboard, can be accessed. ■

System Tray Icon and Notification

The fourth option shown in Figure 10-4 enables you to know that the Office Clipboard is active, even when it's not displayed. When the fourth option is checked, you can right-click the Clipboard icon in the Windows notifications area (the system tray) for the options shown in Figure 10-5.

FIGURE 10-5

Right-click the Active Office Clipboard indicator to display available options.



The fifth option in Figure 10-4 lets you know, when the Clipboard task pane is not displayed, when something has been added to the Clipboard, as shown in Figure 10-6. The message appears close to the notification area.

FIGURE 10-6

Show Status Near Taskbar When Copying lets you know that a copy or cut action was successful, even when the Clipboard task pane is hidden.



Tricks and Tips

When you're working in Word there are a variety of ways of taming the Clipboard's pasting behavior. You can intervene directly by choosing Paste Special, or change Word's default pasting behavior. With a little bit of knowledge and effort, you should be able to carve out a solution that works for you in most cases, as well as an intervention strategy to help deal with the exceptions.

Picture This

While the Clipboard won't perform OCR (optical character recognition) for you, it will let you do the opposite — paste a picture of your text. This can be useful for a variety of reasons, such as because you want non-editable text for use in a document, or because you want something that looks like text but can be manipulated as a graphic.

To paste a "snapshot" of text (which can include graphics, by the way), select the target section of the document and copy it to the Clipboard. Move to the destination, click the expansion arrow on the paste button and choose Paste Special (refer to Figure 10-3). Choose either Picture (Windows Metafile) or Picture (Enhanced Metafile). Sometimes one works but not the other, or vice versa. Use whichever result works or looks best. Note, however, that the picture is limited to one page. If the text spans multiple pages, anything beyond one page will be truncated.

Copying and Moving Text without Using the Clipboard

Now suppose you have a carefully assembled 24-item Clipboard that contains two years' worth of monthly data that you don't want to disturb, but you still have text, graphics, or something else you need to copy or move. What then? Word provides at least five different methods for copying and moving stuff without using the Clipboard. In fact, if you take a hint from one of the methods — the Spike — you'll see that there are myriad other ways as well.

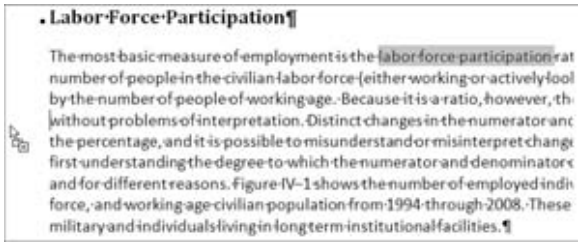
It's a Drag

The first method you probably already know about, but you might not be aware that it doesn't involve the Clipboard. Select what you want copied (text, graphics, whatever) or moved. Do not press Ctrl+C or Ctrl+X or otherwise invoke the Copy or Cut commands. Instead, to *move* the selection elsewhere, simply drag it to the desired location. The Clipboard will never know the difference.

To *copy* the selection elsewhere, drag it to the desired location, but press the control key before you release the mouse button. As shown in Figure 10-7, the mouse pointer sprouts a + indicator, signifying that the action will copy rather than move the selection.

FIGURE 10-7

The + added to the pointer indicates that the control key is being pressed and that you are copying text rather than moving it.



Note that when you're dragging text from Word to another program, such as Internet Explorer, Word automatically copies, rather than moves, the text. For example, you can copy a phrase or a name from Word into the Google (or other) Search text field in Internet Explorer, Firefox, Chrome, or another browser. You do not need to press control in this case.

The F2 Factor

Another method might be one that you're not familiar with. It's a *new* trick that goes back to Word for DOS. Using the mouse or keyboard, select the text or other items you want moved or copied. To move the selection elsewhere, press F2. To copy it, press Shift+F2. The left end of the status bar now prompts "Move to where?" or "Copy to where?" as shown in Figure 10-8.

FIGURE 10-8

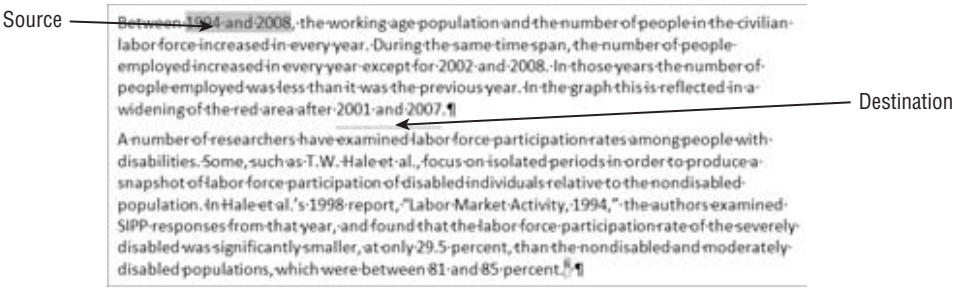
Select text and press F2, and Word prompts you for a destination for the selection.



Next, using any method you choose, move the insertion point to where you want to place the selection (or select the text or other items you want the current selection to replace). Then press enter. If you select text as the new destination, the destination text is indicated by a dotted selection underline that is distinct from Word's normal selection highlighting, as shown in Figure 10-9.

FIGURE 10-9

The dotted underscore indicates the text to be replaced by the source text.



The Spike

In addition to deleting and cutting, there is a third kind of deletion called the *Spike*. Named for those bureaucratic weapons that decorate the desks of receipt collectors, the Spike is used to collect text you delete, with an odd and sometimes-useful twist: Word puts each spiked item into a separate paragraph. This can be useful if you plan to use the Spike to create a list. It's not so useful if you want to insert spiked items in context.

Like the physical spike, Word's Spike collects deletions in LIFO (last in, first out) order, with the oldest spiked deletion at the bottom and the most recent deletion at the top. Unlike the physical spike, however, Word's Spike won't let you remove one piece at a time — it's all or nothing.

The Spike is actually a special AutoText entry that Word creates for you on demand. To use it, select the text you want to collect and press Ctrl+F3; this deletes the text, copying it to an AutoText entry named Spike. If you want to copy text rather than move it, immediately press

Ctrl+Z (UnDo). This restores the deleted text, but does not affect the copy of it already stored as Spike. Continue collecting pieces in this way.

When you're ready to use the contents of the Spike, move to the destination location. To insert the contents of the Spike and empty (delete) it at the same time, press Ctrl+Shift+F3. To simply use the Spike contents, type **spike** and press F3, or locate it among the Building Blocks.

Recall that all but the topmost of the Office Clipboard's items are lost when Office is closed. The Spike, because it is an AutoText entry, resides with your Building Blocks. As long as you don't use the Ctrl+Shift+F3 insertion method, the Spike continues to live on when you close Word, reboot Windows, and so on. Long live the Spike!

Tip

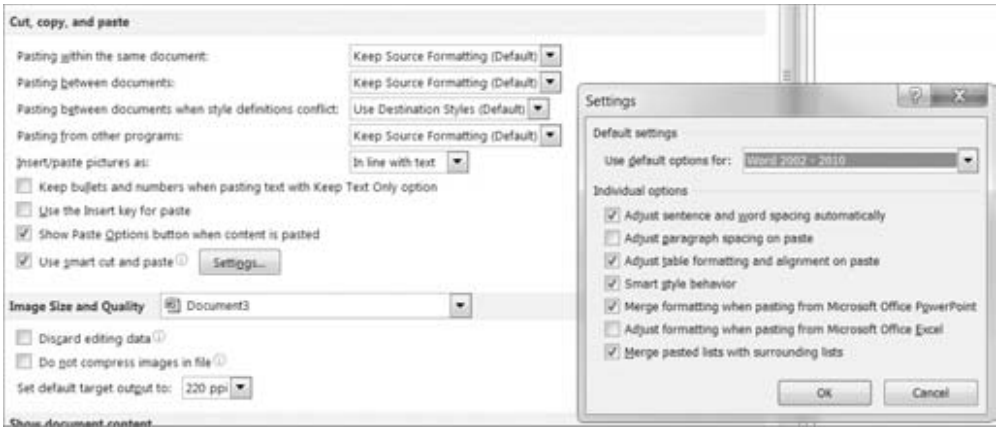
If you haven't guessed by now, Spike isn't the only AutoText or Building Block you can use to store text that can be retained between Office sessions. Moreover, you can also use AutoCorrect. The item can be deleted when it's no longer needed. ■

Word Options and the Clipboard

If you don't get the results you expect or want when you paste, it's possible that you can modify Word's default behavior. Choose File ➪ Options ➪ Advanced, and examine the options under "Cut, copy, and paste," as shown in Figure 10-10. These are covered in detail in Chapter 48. If you have a specific issue, you can take a look at the settings now or jump ahead.

FIGURE 10-10

Word provides a number of settings to modify the default Clipboard behavior.



Summary

In this chapter you've learned about the relationship between the Windows Clipboard and the Office Clipboard, as well as the differences. You've learned how to control when the Clipboard appears, as well as how to prevent it from appearing at all. You should now know how to do the following:

- Accumulate items on the Clipboard without its being visible
- Paste individual items from the Clipboard, or paste the entire Clipboard in one fell swoop
- Use the Clipboard's Paste Special option to control the formatting of pasted text
- Use alternatives to the Clipboard when the Clipboard's contents need to be preserved for another purpose
- Find the options that control Word's default pasting behavior

CHAPTER 11

Find, Replace, and Go To

Throughout the years, for many, one of Word's greatest strengths has been its fabulously powerful array of Find and Replace tools. You can accomplish some pretty amazing and sophisticated editing using them, and the Word user who internalizes the skills and knowledge will be able to impress friends and dazzle officemates.

IN THIS CHAPTER

- Navigation pane search
- Finding text and formatting
- Replacing text and formatting
- Search options
- Special search codes
- Wildcard searches
- Go To

Whoa! What Happened to Find (Ctrl+F)?

The Navigation pane happened — that's what happened. You pressed Ctrl+F, but instead of the familiar Find and Replace dialog box you saw the Navigation pane, shown in Figure 11-1. It's different, and maybe you'll like it, or maybe you won't. If you don't like the Navigation pane, the good old days are just a key or QAT assignment away. But give it a try. You might like it. If you don't, you can ignore it.

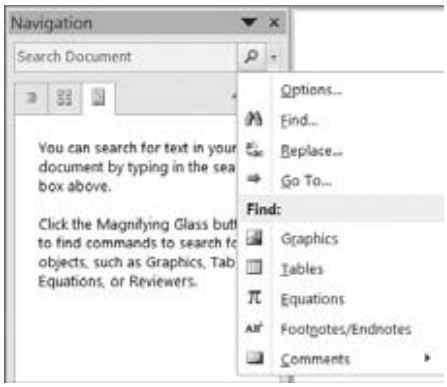
Tip

If you want to trigger the Find and Replace dialog box using a keystroke combination, you can do it. Press Ctrl+H, Alt+D. Okay, that's two keystroke combinations. If that's too much work, then press Ctrl+F to display the Navigation pane. Press Ctrl+Alt+[plus sign on number pad]. This displays the cloverleaf mouse pointer. Use that pointer to click the drop-down arrow at the right end of the Search field in the Navigation pane, and click Find. In Customize Keyboard, press your desired keystroke. It can even be Ctrl+F, but you'll then need to assign something to the Navigation pane search if you want easy keyboard access to it as well.

Note that Ctrl+Shift+F and Ctrl+D both display the Font dialog box, which makes Ctrl+Shift+F a likely and logical candidate for Find. Once you press your desired combination, click Assign ➪ Close. ■

FIGURE 11-1

The Navigation pane provides an interactive approach to searching.



Exploring the Navigation Pane's Search

By default, when you press Ctrl+F, Navigation pane search appears. To see additional choices, click the drop-down arrow next to the magnifying glass, as shown in Figure 11-1. Clicking Find, Replace, or Go To in this list displays the legacy Find/Replace/Go To dialog box with the corresponding tab showing.

With Graphics, Tables, Equations, and Footnotes/Endnotes, the Navigation pane lets you quickly find pictures, tables, equations, footnotes, endnotes, and comments. Note that the Graphics search will find pictures that are in the drawing layer (i.e., ones that are not in line with text), unlike the `^g` special search code, which matches only inline graphics.

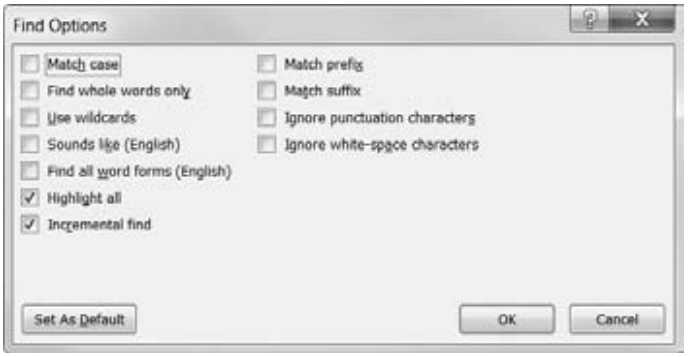
Navigation Pane Search Options

If you click on Options, shown in Figure 11-1, Word displays options available for searching within the Navigation pane. Find Options, shown in Figure 11-2, includes a number of options you might be familiar with from the legacy Find dialog box. New among these, however, is "Incremental find." This option tells Word to search immediately as you type the search text, and to narrow the search as you fill your search term in.

With the exception of "Incremental find" — which works only in the Navigation pane search — the options shown here are replicated in the legacy Find/Replace dialog box. The two search systems are linked, which can save you time. The other options are described later in this chapter.

FIGURE 11-2

The Navigation pane's find options are mostly identical to legacy Find dialog box search options.



Basic Find

To search for text, press Ctrl+F to display the Navigation pane search tab. Type the text you want to find. By default, as you type, Word finds and highlights all matching text — incrementally. So if you type **g**, Word highlights every *g* in the document. Add an **a** and Word highlights every instance of *ga.* Keep on typing and Word narrows the list of matches. In the Navigation pane it displays every match in context, so you can quickly determine whether the matching text is what you seek. In the document, by default, Word highlights all the matches, and moves the document view to the first match.

Unlike the legacy Find dialog box, the Navigation pane search does not have a drop-down list of recent searches — the legacy Find dialog box remembers the seven most recent finds. Note that Word does not retain these searches after being closed and reopened. However, if you are repeating a complicated search, it pays to use the legacy Find instead of the Navigation pane, as shown in Figure 11-3.

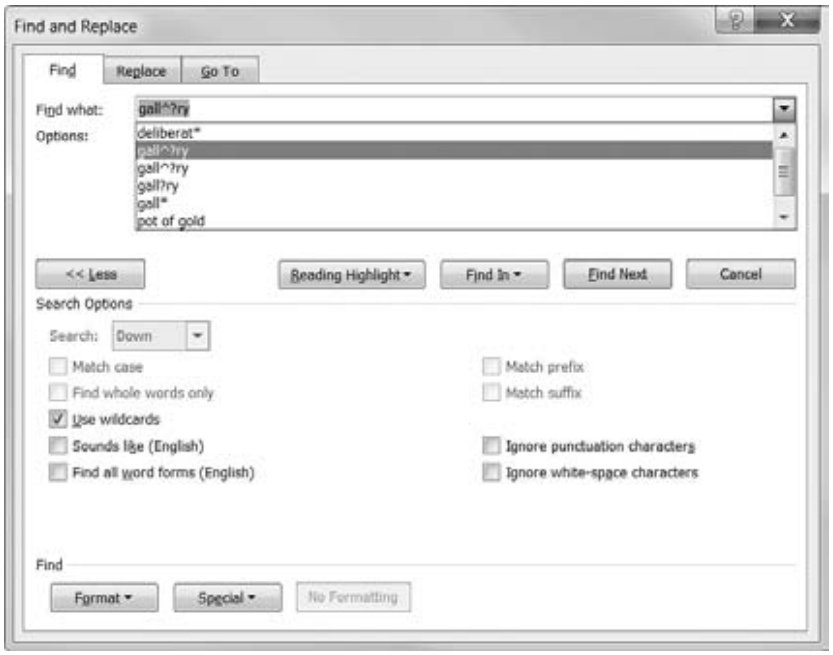
Both the Navigation pane's Search field and the legacy "Find what" field can contain up to 255 characters. This makes it possible to search for long and complicated phrases — and not just text. Those 255 characters can contain a variety of operators to search for patterns of text as well.

Tip

While the Navigation pane doesn't provide access to Replace, it provides a good way to quickly look at all of the potential matches when you're getting ready to do a large-scale Replace. This is a good way to make sure that you won't be applying a change to an unintended match. When you're ready to proceed, click the search drop-down arrow and click Replace. Word transfers the Navigation pane's search text into the "Find what" field. ■

FIGURE 11-3

Word remembers the seven most recent searches from the current session.



Find Again

After a successful Find, to find each successive occurrence you can click the Next Search Result button (in the Navigation pane) shown in Figure 11-4, or the Find Next button in the legacy dialog box.

If the position of the dialog box makes it hide what you're looking for, once you've specified the desired options, you can click Less to hide the rest of the dialog box. Or, if the dialog box is really in the way and you have a large enough screen (or two monitors), you can move the dialog box completely off the Word window.

Note

Both the Navigation pane and the Find/Replace/Go To dialog are *non-modal*. This means that you can click in the text and edit while the pane or dialog box is still onscreen. This is handy because it means you can edit the document while either the pane or the dialog box is onscreen. ■

If you're using the Find dialog box and attempts to move it out of the way still don't let you see what you need to see, close the Find and Replace dialog box and click the Next Browse Object button near the bottom of the vertical scrollbar. As shown in Figure 11-5, when search is active, the Next Browse Object button becomes Next Find/GoTo. You can also press Ctrl+Page Down to

go to the next occurrence. Of course, you can use the opposite control (Previous Browse Object or Previous Find) to go to the previous occurrence.

FIGURE 11-4

Use the Next Search Result button to display the next match in the document window.

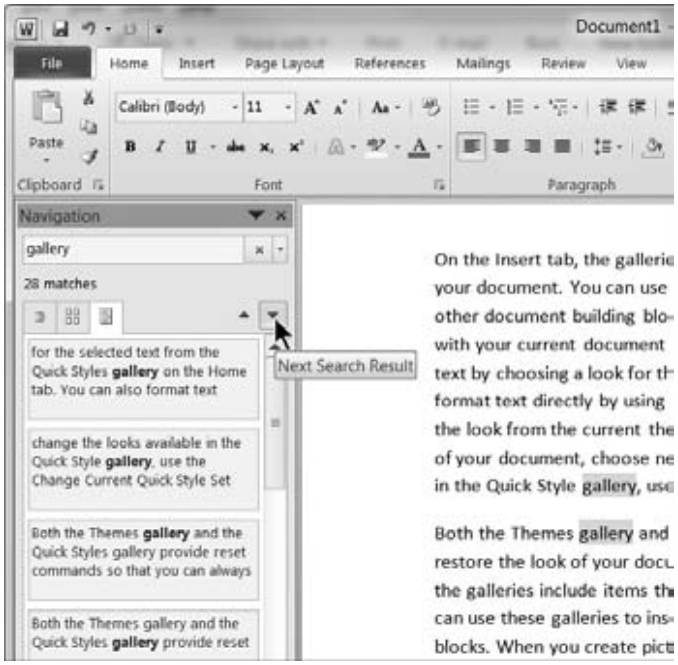
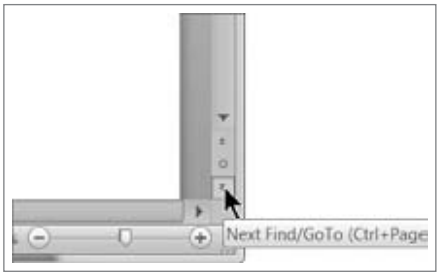


FIGURE 11-5

During a search, the vertical scroll bar's Browse Object buttons become Next Find and Previous Find.



If you're sometimes troubled by the fact that the Browse Object buttons are fickle and can quickly become devoted to some other cause, you can use the Repeat Find keyboard shortcut, which is assigned by default to Shift+F4 and Alt+Ctrl+Y. Or, if you never use F11 or F12 for

their built-in assignments (hint: if you don't know what they do, you'll never miss them), you can assign one of those (or something else) to Word's built-in RepeatFind command. There's something to be said for having an unshifted key that enables you to quickly go to the next search hit.

Search for Selected Text

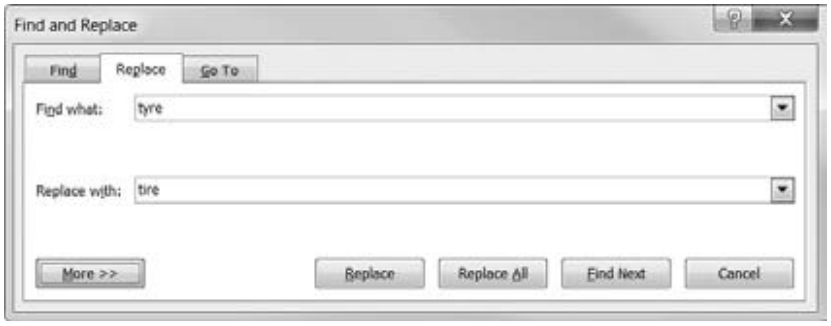
Word can automatically fill in the "Find what" area with the selected text — if the "Find what" box is empty. When you press Ctrl+F, Word copies that text to the Search field. The selected text has to be within a paragraph and can't contain any line, paragraph, or section separators or breaks. If the selection contains more than 255 characters, it will be truncated.

Basic Replace (Ctrl+H)

To find and replace, press Ctrl+H, or click the Replace tool in the Home ribbon. Type the text you want to find into "Find what," as indicated in Figure 11-6. Type the new text into "Replace with" and then click Find Next or Replace All, depending on how sure you are.

FIGURE 11-6

Replace uses the dialog box rather than the Navigation pane.



Caution

Before clicking Replace All, it's a good idea to save the document. Because the Find and Replace dialog box is non-modal, you can click in the document and press Ctrl+S without dismissing the dialog box.

Why save first? If it turns out that clicking Replace All was a mistake, you almost always can recover by pressing Ctrl+Z. However, sometimes a find-and-replace is so complicated that Word will not be able to undo a Replace All. It generally warns you, but sometimes things go awry. Having just saved the document is your ace in the hole if something goes wrong. ■

Search Codes

In addition to accepting text in the Search, "Find what," and "Replace with" boxes, Word can also accept certain codes that enable you to match special characters such as the paragraph mark, tabs, line breaks, page breaks, and a variety of other characters or patterns that a plain search text won't.

These search codes sometimes are mistakenly called *wildcards*. While that generically might be what they are, in Word lingo wildcards are something different. You'll read about what wildcards are to Word a little later in this chapter. They are extremely powerful and versatile, but can be a bit difficult to grasp. Search codes, on the other hand, are somewhat more accessible and easier to understand and use. Where it makes sense, you'll find examples showing how these search codes might be useful.

Note

In the following sections, when I talk about "Find what" I'm also talking about the Navigation pane's Search box. ■

Find What and Replace with Codes (Use Wildcards On or Off)

Search code usage is not always the same in both the "Find what" and "Replace with" boxes. The following codes can be used for either "Find what" or "Replace with," and Use wildcards can be on or off.

Tab Character

The search code for the tab character is `^t` or `^9`.

Example: `^t^t` matches two tabs with no intervening text (which often indicates an extraneous formatting mistake or a missing column entry).

ASCII Character

The search code for an ASCII character is `^nnn`, where `nnn` is the character code.

Example: `^174` matches the ASCII character ≪. It is often used when the exact symbol match is otherwise uncertain or when all you know is the character code.

ANSI Character

The search code for an ANSI character is `^0nnn`, where `0` is zero and `nnn` is the character code.

Example: `^0171` matches the ANSI character ≪. (This is the same character as ASCII `^174`.)

Em Dash (—)

You can use the code ^+ or paste the em-dash character into the box.

Example: Enter ^+ into the "Find what" field and -- (two hyphens) into the "Replace with" field to prepare a document for a publisher who doesn't like Word's em-dash character. By the way, if Word's AutoFormat As You Type options end up creating more work for you than they save, feel free to turn any of them off (File ➪ Options ➪ Proofing ➪ AutoCorrect Options ➪ AutoFormat As You Type).

En Dash (–)

You can use the code ^= or paste the en-dash character into the box.

Example: Use ^= to find/replace regular hyphens (-, between the 0 and = keys) with en dashes.

Caret Character

The search code for a caret character is ^^. Because the caret character has special meaning, to search for an actual caret you must use two of them.

Example: Use ^^^^ to search for ^^.

Manual Line Break

The code for a manual line break is ^l (lowercase *l*) or ^11. (You insert manual line breaks by pressing Shift+Enter.)

Example: When pasting text from other word processors or the Web, you often see manual line breaks instead of paragraph marks. Find/replace ^l with ^p to restore proper paragraph differentiation.

Column Break

The code for a column break is ^n or ^14. Use to locate manual column breaks.

Example: Find/Replace ^n with nothing to remove manual column breaks.

Page or Section Break

Use ^12 for a page or section break. When you're replacing, ^12 inserts a manual page break. The only way to insert specific types of section breaks is using the Breaks tool on the Page Layout ribbon. The ^12 formulation sometimes is necessary for cleaning up text pasted from the Internet or text recovered using Recover Text from Any File (in the Open dialog's file type setting).

Example: Find/replace ^12 with ^p to replace extraneous page breaks with paragraph breaks. You might then follow up with finding/replacing ^p^p with ^p to remove extraneous empty paragraphs.

Manual Page Break

The code ^m, when you're searching or replacing and Use wildcards is not enabled, matches and inserts only manual page breaks. Use this to differentiate between manual page breaks and section breaks. With Use wildcards enabled, ^m matches both manual page breaks and section breaks.

Example: With Use wildcards turned off, find/replace ^m with ^12 when major changes have been made to a previously carefully paginated document that has undergone major editing that renders leftover manual page breaks obsolete. At the same time, you often want to preserve section breaks, since they usually serve a different purpose.

Nonbreaking Space

Use ^s for a nonbreaking space. The nonbreaking space (which you insert by pressing Ctrl+Shift+Space) is used to prevent certain word combinations, number specifications, and so on from breaking across two lines, and looks like a degree symbol when the non-printing space character is displayed. It also sometimes shows up in imported text acquired from the Internet or when you want to convert documents from other sources. Sometimes all spaces in an imported/converted document are represented as nonbreaking, preventing a document from flowing correctly.

Example: Find/replace ^s with a plain space to prevent odd line-break behavior.

Nonbreaking Hyphen

This code, ^~, is used for nonbreaking hyphens. These are used in much the same way as nonbreaking spaces, to prevent text from breaking in an unacceptable way. For example, a fraction typed as 1-1/2 should never be broken at the hyphen. Sometimes, however, all hyphens in imported/converted/pasted text can be represented as nonbreaking, creating formatting and flow issues. See the preceding example for a typical use.

Optional Hyphen

Optional hyphens, ^-, are inserted in a document to indicate a preferred place to hyphenate a word, when and if necessary. You insert them by pressing Ctrl+Hyphen (top row, not the number pad's minus sign). Leftover optional hyphens sometimes can create formatting and flow issues when you export Word documents to other formats. The optional hyphen character also shows up sometimes when you're importing text into Word.

Example: Find/replace ^- with nothing (i.e., an empty "Replace with" box) to strip out optional hyphens.

Find What and Replace with (Use Wildcards Off)

The following search code works in the Navigation pane's Search field and in both the "Find what" and "Replace with" fields, but only if Use wildcards is turned off.

Paragraph Mark

The code for paragraph marks is `^p`. This code is typically used to find the beginning or end of paragraphs, as well as to "clean" text that contains extraneous empty paragraphs.

Example: `^pt` would match paragraphs that begin with the letter *t*. Or find/replace `^p^p` with `^p` to remove extraneous empty paragraphs.

Find What: Field Only (Use Wildcards Off)

The following codes work only in the "Find what" field because they mean "any ____" — such as any character, any footnote, or any graphic. In the "Replace with" field, "any _____" would be nonsensical. Although, if it replaced the "Find what" text with a random picture, that could be kind of fun.

Picture or Other Graphic (Inline Only)

The code for a picture or graphic is `^g`, typically used to find any kind of inline graphic. This code works only in the "Find what" field. Note that the Navigation pane's Graphic search will find pictures that are inline as well as pictures that are in the drawing layer.

Example: The Repeat command (F4) works not only with text, but frequently with graphics as well. Suppose you have a number of graphics all formatted as "In line with text", but now want them to be formatted so that text wraps around them. In "Find what" type **`^g`**, and find the first instance. Dismiss the Find dialog box. Choose Picture Tools ➪ Format ➪ Wrap Text ➪ Square or Tight. Click the Find Next browse control (at the bottom of the vertical scrollbar) and then press F4 to repeat the wrapping formatting. Continue alternately clicking Find Next and pressing F4 until you've reset all the graphics you want.

Footnote or Endnote

Use the code `^2` to locate footnote and endnote reference marks — whether in the body text or in the notes areas.

Footnote Mark

The code `^f` matches any footnote reference mark — in the text or in footnote areas.

Example: Set "Find what" to **^f** and "Replace with" to **Red** to make footnote reference marks easier to spot.

Endnote Mark

The code `^e` matches any endnote reference mark — in the text or in endnote areas.

Any Character

The code `^?` matches any character at all, so you can substitute it for a missing character or characters when you're unsure of how something is spelled or specified.

Example: Set "Find what" to **unioni^?e** to match *unionize* and *unionise* (as well as *unionite* and *unionixe*, which are worth finding if for no other reason than that they aren't words).

Any Digit

The ^# code matches digits (0 through 9).

Example: Set "Find what" to **(^#^#^#)** ^#^#^#-^#^#^#^# to match a common US telephone number pattern.

Any Letter

The code ^$ matches any letter in any language, accented or unaccented.

Example: Set "Find what" to ^**$**^**$**^**#**^**#**^**#** to match two letters followed by three numbers. The pattern ^$^#^$ ^#^$^# matches any Canadian postal code.

Unicode Character

The code ^unnnn is for Unicode characters, where nnnn is the character code.

Example: Set "Find what" to ^**u0065** to match the letter *a*.

Field

The code ^d matches/selects field codes when field codes, rather than field code results, are displayed. Press Alt+F9 to toggle field codes on and off.

Example: You might use this to selectively convert some field codes into hard text. Toggle field code display on, set "Find what" to ^**d** and find the first field. Selectively press Ctrl+Shift+F9 to convert field codes to hard text, and then use the Next *browse object* button to move to the next field.

Opening and Closing Field Braces (When Field Codes Are Visible)

The codes for matching opening and closing field braces are ^19 and ^21, respectively. This can be useful for finding text immediately preceding or following a field, especially when you're writing macros for complex editing.

Example: "Find what" ^21. (include the period in the search text) finds any field that occurs at the end of a sentence (as long as field codes are displayed). "Find what" before ^19 would find the word *before* followed by a space and any field code.

Comment

Use the code ^a or ^5 for inline comments.

Example: Set "Find what" to ^**a** and leave "Replace with" blank to quickly remove all comments from a document. Note that Balloons cannot be displayed; comments must be displayed inline.

Section or Page Break

The code ^b locates section breaks.

White Space

The code ^w can be used to skip over any combination of regular and nonbreaking spaces and tab characters. This can be useful when you're looking for two distinct patterns of text that are separated by an unknown amount of white space.

Example: Set "Find what" to ^#^#^#^**w**^#^#^# to match two three-digit groups of numbers separated by any amount of white space. Or use **John**^**wSmith** to find any occurrences of *John* and *Smith* that are separated only by white space.

Codes That Work Only in the "Replace with" Box (Use Wildcards On or Off)

Two of the most useful codes can be used only in the "Replace with" box, but they can be used regardless of whether Use Wildcards is enabled. These two allow for some of the most powerful find/replace editing you can do with Word.

Clipboard Contents

Code for clipboard contents is ^c. The clipboard, as we know, can hold a tremendous amount of text, graphics, and formatting. One possible use of this facility is to include an arbitrary replacement symbol or token for text and/or graphics that will be provided later. This can be especially useful when you will need to include the item in more than one place in a document. When the material is ready, simply copy it to the clipboard. Then put the token into "Find what" and ^**c** into the "Replace with" field. Note that "clipboard" in this case refers only to the top item in the clipboard. However, the contents can come from anywhere in Windows.

"Find What" Matching Text

I call ^& the "ditto" code. Regardless of how complex the "Find what" pattern is, ^& will contain the text that actually matched it. For example, if you were searching for ^$^#^#^#^#, i.e., any letter followed by any four numbers, then ^& becomes the actual text that matches that. On successive hits it might be S4122, T4523, a6678, and so on. You can then use ^& in the "Replace with" box along with other characters.

Example: Suppose that you're trying to place brackets around every part number in a large document. Set "Find what" to a pattern that matches the part number pattern (for example, ^#^#^#^-^#^#^#^# for numbers like 908-5534 and 324-8776), and put **[^&]** in the "Replace with" box. Whatever number matches the pattern will be replaced by the same number enclosed in brackets.

Options

Find and Replace provide a number of options that greatly expand search functionality, utility, and power. Some of these options are explicitly designated using checkboxes. Others are implicit, based on the "environment" in which you are searching, such as whether text is selected, as well as the nature of the selection.

Selected Text

You've already seen what happens when a word is selected when you press Ctrl+F and the "Find what" box is empty. The same applies when you press Ctrl+H. If a broader area of text is selected when you perform a search or replace, Word initially confines itself only to the selected region in searching for the "Find what" text. Once it has exhausted the selection, it prompts as shown in Figure 11-7.

FIGURE 11-7

When text is selected, the initial Find searches only the selection.



You can use this searching behavior to your advantage, especially when performing a Replace. Often, you will want to confine a Replace to a carefully targeted section of a document. Rather than having to remain vigilant to avoid exceeding the boundary of your intended search, select the search area *before* you click Replace All. In this case "all" means only all of the selected area, rather than the entire document.

More or Less

Figure 11-6 shows the Find and Replace dialog box in its minimalist state. In many, if not most, instances, this is all you'll need to see. If you don't see what you want, click More. The "More" version of the Find tab is shown in Figure 11-3. In the sections that follow, each of the options is explained.

Reading Highlight

Use Reading Highlight to apply temporary highlighting to all parts of the document that match the "Find what" text or pattern. It's "temporary" because the next time you use the highlighting tool directly, the Reading Highlight goes away. You can also clear the highlighting by pressing Ctrl+F and choosing Reading Highlight ➪ Clear Highlighting.

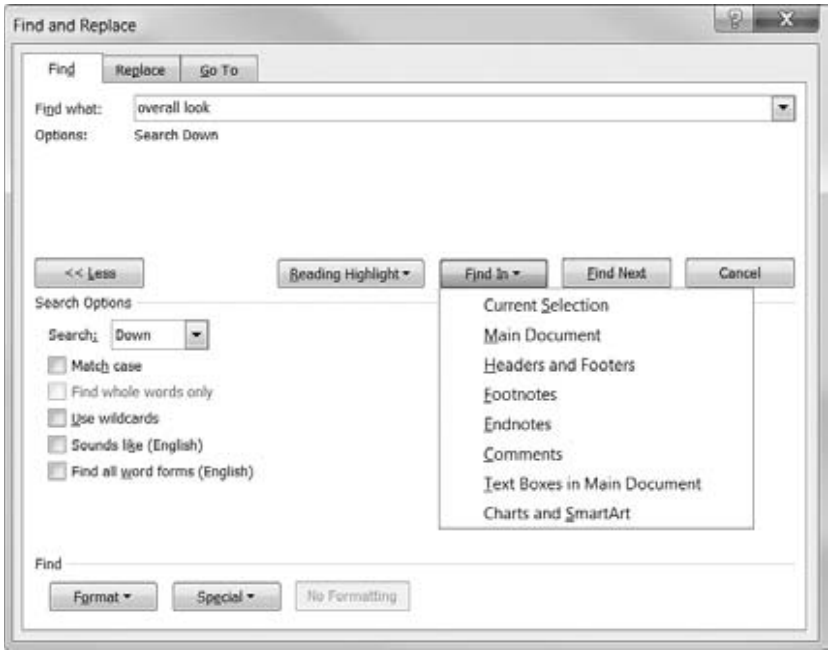
Find In

The Find In drop-down options let you confine your search to a particular part of the document. This feature is especially useful in documents that contain a number of different types of content. Available options depend upon document complexity. If no text is selected, Word defaults to the document area containing the insertion point, such as the main document, the

header, etc. If text is selected, Word defaults to searching the selection. In more complicated documents Find In options include Selection, Main Document, Footnotes, Endnotes, Comments, Charts and SmartArt, Headers and Footers, etc. Figure 11-8 shows a variety of Find In options in a fairly complicated document.

FIGURE 11-8

Find In lets you target your search to a particular part of the document or type of content.



Search Direction

You use the Search drop-down to control the search direction. If no text is selected it defaults to All, which means that Word will search from the insertion point forward, wrap back to the beginning, and stop at the insertion point. Down searches from the insertion point to the end of the document, and Up searches from the insertion point toward the beginning. If a block of text is selected, then that block is searched, and Word then asks if you want to continue (refer to Figure 11-7).

Match Case

This option tells Word to match the exact capitalization specified in the "Find what" box. For example, by default, setting "Find what" to **the** will match "the" no matter how it appears in a

document: *The, THe, Thee, these, THEATRE, the, other,* and *narthex.* With "Match case" enabled, the same "the" would match only *these, the, other,* and *narthex.* An additional option enables you to narrow the focus to whole words only.

Find Whole Words Only

Use this option to find whole words. From the preceding example, with this option enabled, "the" now matches only the word *the.* You could combine the Whole Words option with "Match case" to try to locate only the word *The* (for example). For maximum utility, you might combine the Whole Word option with other search terms if you want to find the word *The* when it's not at the beginning of a sentence.

Use Wildcards

The "Use wildcards" option enables the use of a special set of operators to enhance your searches. When "Use wildcards" is enabled, different rules and different codes apply, although, as indicated earlier in this chapter, some codes work regardless of the "Use wildcards" setting.

For "Find what" and "Replace with," note that the Special dropdown list changes depending on which textbox is selected. We'll look at each in turn.

For examples that require spaces, I'll use the · character, rather than something like [space]. Hopefully the examples will be less cluttered and confusing that way.

Find What: Codes

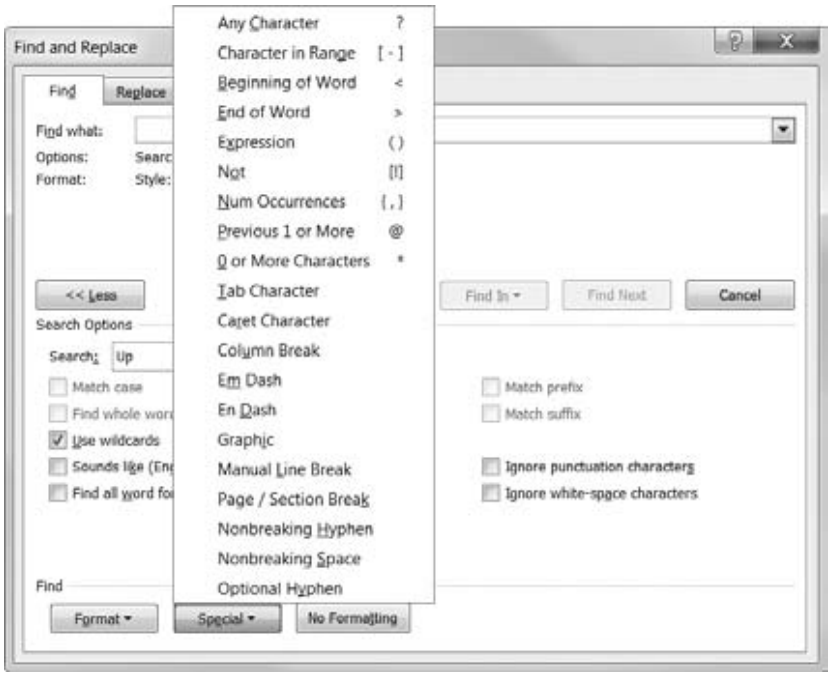
To see a list of the special codes allowed in the "Find what" box when "Use wildcards" is enabled, click More if necessary, click in the "Find what" field, and then click Special at the bottom of the expanded Find dialog, as shown in Figure 11-9.

There is one very important thing you need to know about Find What when using wildcards: Every actual search character specified in the "Find what" box is case-specific. For example, if you type an *m*, Word will match only *m*, and not *M*. Remember this. I will explain later why some searches don't work, and need to be made smarter. As shown in Figure 11-9, although partially hidden by the Special list, "Match case," "Find whole word," "Match prefix," and "Match suffix" are all grayed out as unavailable.

Of the "Find what" Special codes shown, only the top nine listed are actually wildcard operators, because the others match the specific characters indicated. When "Use wildcards" is selected, use the Special list to insert characters for searching (at least until you become familiar with them), as some of them are different from what you use to search when "Use wildcards" is not enabled.

FIGURE 11-9

Click Special to see a list of codes that are allowed in ''Find what'' when ''Use wildcards'' is enabled.



The nine search operators are used to search for a wide and flexible variety of text patterns. Most of them can be used in combination to achieve even more powerful searching capabilities.

Exception: \

Note that a number of characters act as operators for wildcard searches, such as `@`, `[`, `]`, `{`, `}`, `*`, `?`, and even `\` itself. If you need to search for any of those characters while wildcard search is enabled, precede the character with `\`. For example, to find a `\` character, use `\\`. To find `[`, use `\[`, and so on.

Any Character: ?

In a non-wildcard search, the code for any character is `^?`. For wildcard searches, omit the caret (`^`). For example, to match all five-letter words beginning with *m* and ending with *h,* specify the "Find what" as **m???h**.

However, is that really correct? No, it's not. That's because `?` can be *any* character, not simply a letter. Hence `m???h` would match not only *mitch* and *motch,* but also *m123h.* On the other hand, because the wildcard-enabled "Find what" box is case-specific, the pattern shown won't

match *Mitch, Match,* or *Motch.* To build the correct search, use the range `[a-z]` feature, explained below.

Characters in Set: [ ]

If *m* doesn't match *M,* then how would you look for *m* or *M?* Specify the set `[Mm]` (or `[mM]`). Any character in the set will match any single character in your document. Although `[Mm]` contains two characters, it's a special do-it-yourself wildcard that means "match any *m,* regardless of case." Or, put another way, in this case it means *M* or *m.*

What if you want to find two *m*s? Then specify two sets: `[Mm][Mm]`. That would find *mm, MM, Mm,* or *mM.* And why am I suddenly hungry for M&Ms?

Suppose, for some bizarre reason, that you wanted to highlight all the vowels in a document. You could do it by specifying the set `[aeiouAEIOU]`. (You could even include `y` and `Y`, although the set would not be able to distinguish between `yY` used as a vowel and `yY` used as a consonant.)

Note again that the set `[aeiou]` isn't looking for five vowels. It's looking for just one vowel, and it can be any of those five. For example, if "Find what" is `m[aeiou]t`, then the search will find *mat, met, mit, mot,* and *mut.*

What about accented characters? No — 'fraid not. The set `[aeiou]` would not match any of *á, é, í, ó,* and *ú.*

Note

Note that when you're using sets, the "characters" can also be ASCII, ANSI, or Unicode specifications of characters. For example, rather than `[ABC]`, you could use `[^65^66^67]`. This applies to the range expression below as well. For example, `[^65-^67]` would also work for matching an *A, B,* or *C.* ■

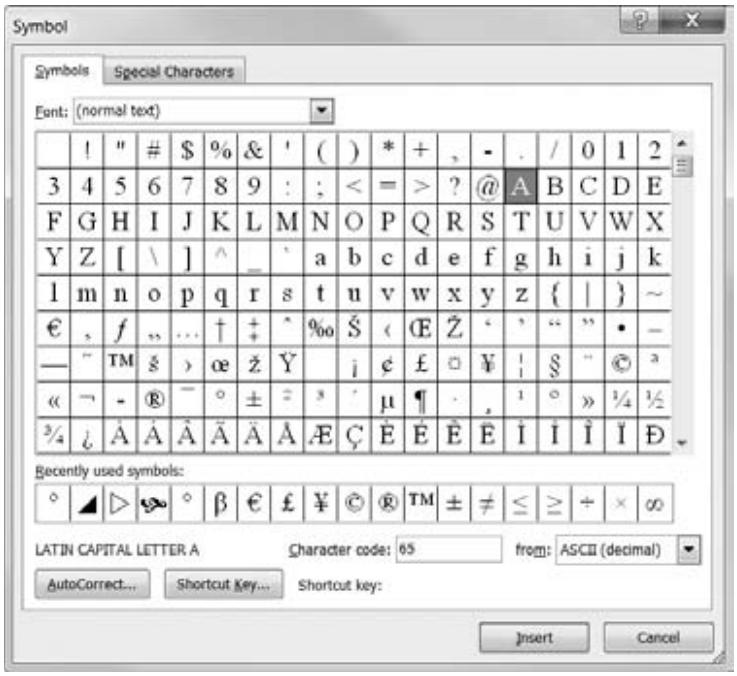
Characters in Range: [-]

There is an inherent order to the characters you use on your computer. To see that order, choose Insert ➪ Symbol ➪ More Symbols ➪ Symbols tab ➪ "Font: (normal text)" for the view shown in Figure 11-10. Note that A is selected. Near the bottom, the "from" field is set to ASCII (decimal), and the "Character code" field has 65 displayed. If you click the letter B, the code becomes 66. The code for a lowercase *a* is 97, *b* is 98, and so on.

For example, if you try to specify a range of `[G-A]`, that's not a valid range, and Word displays an error message saying so. However, `[A-G]` *is* a valid range, and would match any character from *A* to *G.*

FIGURE 11-10

Use the Symbol table to determine what characters are in specific ranges.



In non-wildcard searches you can specify `^$` to match any letter. To succinctly specify "any letter" in a wildcard search, you might try `[A-z]`. However, that will also match the characters `[`, `\`, `]`, `^`, `_`, and `` ` ``.

What you're really looking for is `[A-Z]` and `[a-z]`. You can specify that using `[A-Za-z]`. Another interesting thing about ranges is that they're a bit more powerful and embracing than sets. For example, recall that `[aeiou]` doesn't match any accented vowels. Well, the range `[a-z]` does match the accented lowercase vowels, but it also matches many more characters.

Beginning of Word: <

The < operator is used to match the beginning of a word. For example, `<ton` would match *ton, tongue, tone, toner,* and so on. This can be useful when you're trying to locate words in which *ton* doesn't occur in the interior of a word, such as *Newton, stone,* and *Estonia.*

End of Word: >

The > operator is used in the same way as the < operator, but to find letters or patterns that occur at the end of words. For example, `[uU]>` would match only words that end in the letter *u,* regardless of case.

A common use for < and > is to use them together to find whole words. This can be especially useful because, as noted previously, when wildcards are used, the "Find whole words only" option is unavailable. Moreover, < and > let you carefully target which whole word you're looking for. For example, setting "Find what" to `ing a <car>` would let you match the trailing portion of *driving a car*, while not matching *Seeing a careless plan*.

Rearranging Text with the Expression Operators: ( )

Recall the `^&` search operator, which inserts the matching text into the "Replace with" box. The `( )` operators enable you to divide the "Find what" matching text into distinct components so you can rearrange them. The `( )` operators are used in conjunction with the `\n\n` "Replace with" operators. This can be especially useful when you're working with lists that aren't in tables, when you need to swap the order of the components, or when you need to insert a needed component.

For example, suppose you've been told you need to add commas to all "item, item and item" phrases. You could simply look for `^$ and` and visually assess whether it's a comma-needed situation. However, this would result in matches for a number of two-item situations for which no comma is needed.

Or, you could use wildcards to try to narrow the range of hits to those that are closer. For example, you could set "Find what" to `<*>, <*> and`. This lets you match the pattern being sought, but it provides no way to insert a comma after the second <*>.

Instead, you can group the different components: `(<*>, <*>)(and)`. Now the "Find what" text is two separate components. Each can be referred to in the "Replace with" box using `\1` and `\2`. Setting "Find what" to `(<*>, <*>)(and)`and "Replace with" to `\1,\2`, you can now use Replace to insert a comma between whatever two sets of text match the "Find what" box.

This creates an almost endless array of possibilities when you're using Find and Replace to perform complex editing chores. Keep in mind, however, that it sometimes takes a bit of experimenting to get it just right, and that Replace All might give you results you aren't expecting. Always check your results by using Replace, rather than Replace All, at least until you're positive you'll get the results you want.

Note

While the opportunities to be clever with such expressions are tempting, in any given situation you need to weigh the time involved in solving such problems against using simpler methods. In the current instance, if you can't work out a pattern-matching method quickly, it might be faster to simply use the non-wildcard method outlined at the beginning of this section, using visual inspection to decide when to insert the comma. Or simply turn on the grammar checker's "Comma required before last list item" option. On the other hand, sometimes a considered use of wildcards can save you hours of tedious editing. Just make sure you don't spend even more hours trying to work out a clever solution. ■

Not: [!]

Use the `!` operator inside brackets to tell Find not to match a given character or range. For example, the "Find what" expression `[!0-9][0-9] [0-9] [0-9] [!0-9]` can be used to match only three-digit numbers. Without the leading and trailing `[!0-9]` expressions, you would match three digits wherever they occur, including multiple locations within any number with four or more digits.

Another inventive use might be to look for the use of the letter *q* where it's *not* followed by a *u*. For this, specify the "Find what" expression as **[Q][!Uu]**. If you were writing a treatise on the Middle East, this might enable you to quickly focus on transliterated proper names so you could scrutinize their spelling more carefully.

Exactly n Occurrences: {n}

This expression is used to shorten "Find what" expressions by letting you specify the number of times the character or expression preceding it occurs. Naturally, it would be silly to use `e{2}` to search for two *e*s. Simply use `ee`. However, if you needed to search for exactly 25 consecutive *e*s, then `e{25}` is more efficient.

As a more practical example, you could use this feature to search for 12-digit numbers with `[!0-9][0-9]{12}[!0-9]`. Can you see why the main expression is bracketed with `[!0-9]`? That's to prevent it from matching multiple portions of numbers with 13 or more digits. Apparently, *exactly* doesn't mean what it might mean. It doesn't mean "Match numbers that are only 12 digits long." It means that you match only 12 consecutive numbers, regardless of where they occur, including the interior of a larger number.

At Least n: {n ,}

Use this specification to match at least *n* of the characters matching the preceding expression. For example, `·{2,}` would match two or more consecutive spaces.

From n to m Occurrences: {n,m }

Use this specification to match a range of occurrences of a character or expression. For example, `<[A-Za-z]{4,6}>` would match four- to six-letter words, but no words that are shorter or longer.

Previous 1 or More: @

Use this specification to match an unknown number of consecutive occurrences of the same character. For example, `[.?!][·^9]@[^13]` would match any number of trailing spaces and/or tabs at the end of a paragraph, regardless of their order. This can be useful in cleaning up text converted/pasted from non-Word sources.

Note that the `@` expression is most useful when it comes between other expressions. For example, `o@` matches *o, oo, ooo, oooo,* and so on. But sooooo what? It would match each *o* anyway because each *o* is one or more occurrences of *o.* However, the expression `ho@t` matches *hot, hoot, shot, shoot,* and so on. When you bracket the `@` expression between other characters or expressions, you prevent it from matching individual characters.

*0 or More Characters: **

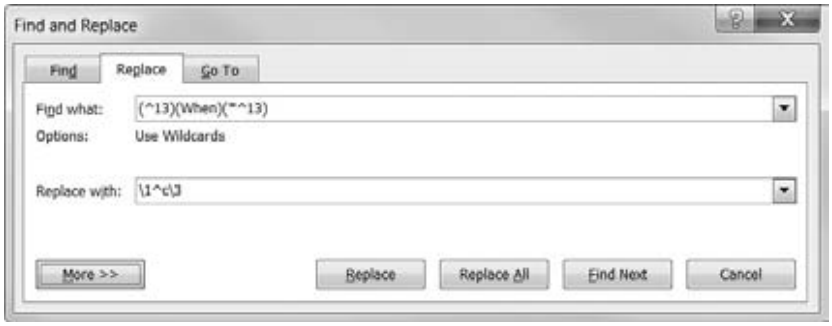
The * wildcard is extremely useful in looking for larger patterns. For example, suppose you want to embolden the word *when* anytime it occurs at the beginning of a paragraph. The expression `^13When*^13` will match and select any paragraph that begins with the word *when,* along with the paragraph mark that precedes it. If you omit the opening `^13`, however, then `*^13` matches any occurrence of *when* up to the first paragraph mark that follows it, even if *when* isn't at the beginning of a paragraph.

If it matches the preceding paragraph mark, how would you separate out the target paragraph and the extraneous paragraph mark? You would use the grouping and rearranging operators, `()` and `\`. For example, if you specify `(^13)(When*^13)`, then `\1` is the extraneous paragraph mark, and `\2` is the target paragraph that begins with *when.*

We're still left with the question of how to apply bold just to the word *when.* Now is when you have to get creative and combine the different techniques. Remember that `^c` places the clipboard contents into the "Replace with" box. First, copy a bold occurrence of *when* to the Clipboard. Next, rephrase the "Find what" expression so that you isolate the word *when* as a grouping expression. Do this with `(^13)(When)(*^13)`. Finally, specify "Replace with" as `\1^c\3`, as shown in Figure 11-11.

FIGURE 11-11

Creative use of wildcard operators can save editing time.



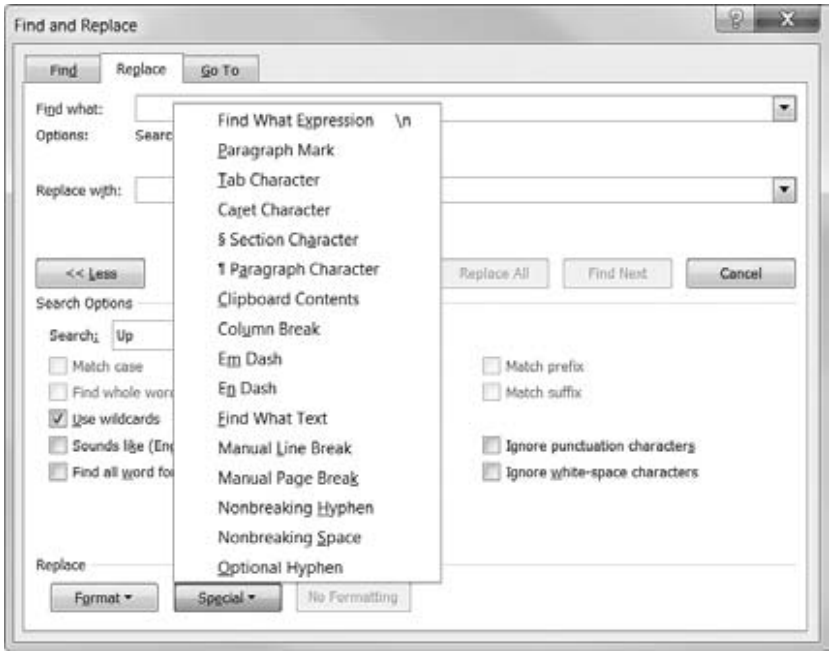
"Replace with" Codes

The preceding section focuses on the "Find what" codes. Codes that work in the "Replace with" field with wildcards enabled are shown in Figure 11-12.

Three of these are especially useful in wildcard searches, and were already explained earlier in this chapter: `\n`, clipboard contents (`^c`), and "Find what" text (`^&`). For a detailed explanation of each of these, see "Rearranging Text with the Expression Operators: ( )," "Clipboard Contents," and "'Find What' Matching Text," respectively.

FIGURE 11-12

Codes that can be used in the ''Replace with'' field when wildcards are enabled



Sounds Like (English)

The "Sounds like" option matches homonyms and phonetically "correct" inventive spellings. It works fairly well, but not perfectly. While `surfboard` matches *surphbored*, `surfbored` doesn't.

Find All Word Forms (English)

This option is designed to find all forms of words that have the same root as the search text. For example, in theory, `react` would match *reacted, reacts, reacting, reaction,* and *reactionary,* but it doesn't match the latter two. In general it tends to match verb forms fairly well, but doesn't do very well with nouns, adjectives, and adverbs.

Match Prefix and Match Suffix

These two options effectively enable you to target words beginning or ending with specific patterns, without having to use more complicated search specifications. With "Match prefix" enabled, a "Find what" entry of `dis` matches all words that begin with *dis,* while at the same time preventing matches when *dis* occurs elsewhere in the word. For example, it would match *disappointing, disillusionment,* and *dissection,* but would not match *TARDIS, indistinguishable,* or *antidisestablishmentarianism.*

The "Match suffix" option works for suffixes. For example, in a philosophical work, it might be useful for finding all words ending with *ism*. Just don't mistake *prism* or *isomorphism* for *communism* and *totalitarianism*.

When you're using the "Use wildcards" option, "Sounds like," and "Find all word forms," both "Match prefix" and "Match suffix" are disabled. You can use "Match prefix" and "Match suffix" at the same time. You will quickly discover, however, that you will never match anything at all — not even *ionization*. This is called a bug.

Ignore Punctuation Characters

This option tells Word to ignore punctuation characters that intervene in a word's spelling. For example, suppose a document uses things like *char(act)er* or *dis"appoint"ment* to make a point or stress something about a word. Ordinary searching for `character` or `disappointment` would find neither. By enabling "Ignore punctuation characters," you tell Word to find *dis"appoint"ment*. However, it can't find *char(act)er*. That's because "(" and ")" aren't considered punctuation characters for this purpose.

Punctuation characters that are ignored include the following: commas, semicolons, periods, question marks, exclamation marks, forward slashes (`/`), quotes (single and double, smart and dumb), and the hyphen (simple `-`, but not the em dash or en dash).

Ignore White-Space Characters

Use this option to find words that might be broken up by spaces, optional hyphens, or tabs. For example, with this option enabled, a search for `direction` would match *direct[space]ion* and *direc[tab]tion*. This can be useful in searches for specific words in imported or converted text that might not be perfectly formed, or that might have irregular spacing because of the way it was presented in another word processor or on the Web. This option does not ignore nonbreaking spaces, nonbreaking hyphens, em spaces, or en spaces, however.

"Ignore white-space characters" and "Ignore punctuation characters" can be combined for even more useful searching. When you're looking for a word or a name in a long article, for example, you might paste the article into Word just so you can use this feature to bypass "garbage" that sometimes prevents an ordinary search from finding something you know is there.

Finding and Replacing Formatting

One of Word's greatest strengths is its ability to both search for formatting in the "Find what" box and apply formatting using the "Replace with" box. To use formatting in Find/Replace operations, click the More button to expose the full dialog box, and then click the Format button in the bottom left corner, shown in Figure 11-13.

FIGURE 11-13

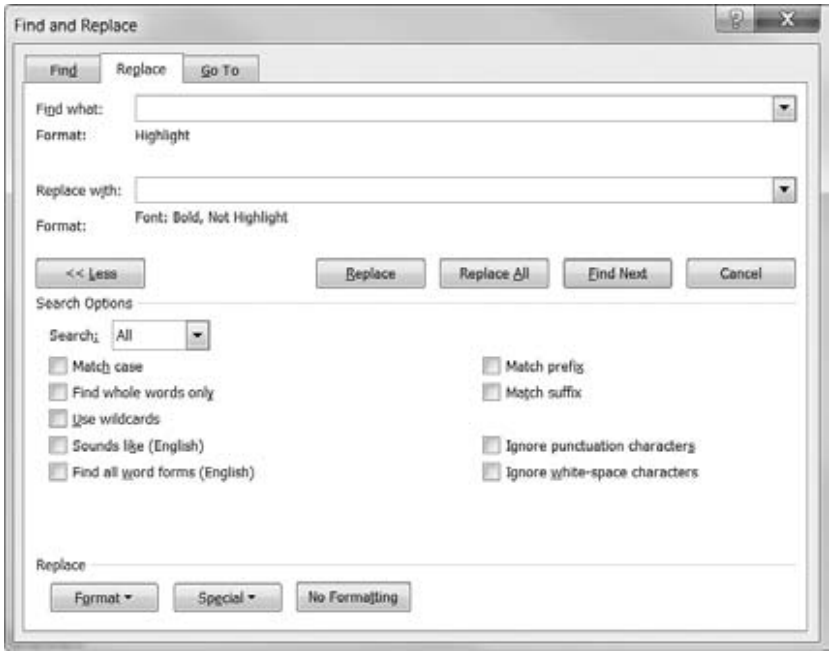
Use the Format button in Find and Replace to specify formatting to search for or apply.



For example, to search for text that has been highlighted, click in the "Find what" box and type the text you're looking for. To search for all text with a particular kind of formatting, leave "Find what" blank. Choose Format ➪ Highlight from the Find and Replace dialog box. As shown in Figure 11-14, the formatting to be included in the search appears under the "Find what" box.

FIGURE 11-14

When formatting is included in a search, the Format indicator appears under ''Find what'' and/or ''Replace with.''



Suppose you also want to remove highlighting. Click in the "Replace with" field and choose Format ➪ Highlight twice. The first time displays Highlight in the "Replace with" box's Format area; the second time adds the word "Not."

At the same time, let's not only remove the highlighting, but also make all the text that was highlighted bold. To do that, you could choose Format ➪ Font, and so on, but don't. Instead press Ctrl+B. You can add some attributes to the "Find what" and "Replace with" boxes using keyboard shortcuts instead of having to use the Format option. This can save time, as well as screen real estate, because you don't need to click More for such attributes.

Unfortunately, highlighting's normal shortcut (Alt+Ctrl+H) does not work in the Find and Replace dialog box. Several keyboard shortcuts do work in the Find and Replace dialog box, however. They are shown in Table 11-1.

TABLE 11-1

Formatting Shortcut Keys That Work in Find and Replace

Action/Command	Shortcut key
Clear all character formatting	Ctrl+Space
Subscript	Ctrl+=
Superscript	Ctrl+Shift+=
Single space	Ctrl+1
One and a half space	Ctrl+5
Double space	Ctrl+2
Bold	Ctl+B
Double underline	Ctrl+Shift+D
Centered	Ctrl+E
Hidden text	Ctrl+Shift+H
Italic	Ctrl+I
Justified	Ctrl+J
Small caps	Ctrl+Shift+K
Left aligned	Ctrl+L
Clear paragraph formatting	Ctrl+Q
Right aligned	Ctrl+R
Underline	Ctrl+U
Word underline	Ctrl+W

Note

Two handy shortcuts are Ctrl+Space and Ctrl+Q. These clear character and paragraph formatting, respectively, from the Find/Replace boxes. Because Alt+T is redundantly assigned in the Find/Replace dialog box, you can't count on being able to press Alt+T to remove the formatting from the boxes. Quickly pressing Ctrl+Space and Ctrl+Q might be faster than trying to figure out later not only why formatting is still on, but how "Match suffix" was enabled too. ■

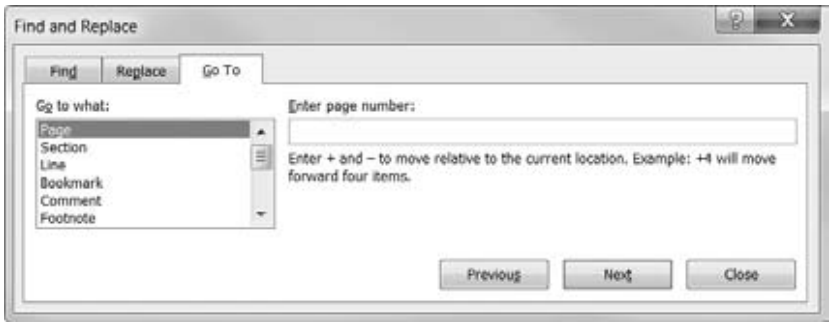
Go To (Ctrl+G)

The other tab in the Find and Replace dialog box houses the Go To functions. The shortcut key for Go To is Ctrl+G. Like the Find and Replace dialog box's other states, the Go To tab is also non-modal, meaning you can edit your document without dismissing the dialog box.

Shown in Figure 11-15, the "Go to what" list is home to a variety of different document elements to which you can go. As you scroll through them, notice that some have additional options that are specific to certain kinds of go-to-able parts of a Word document.

FIGURE 11-15

Most of the "Go to what" types enable you to move relative to the current location. Entering +5 here would cause you to jump ahead five pages.



The "Go to what" list can be set to any of 13 different items. Not all of these features are uniquely addressable in this dialog box. You will see some of the alternatives in the following sections so you can get an idea of whether the Go To tab is the best form of transportation for your particular journey.

Another thing to be aware of is that what you see isn't always what you get. Some of the Go Tos offer additional options beyond what the "Enter + and −" instructions tell you.

Page

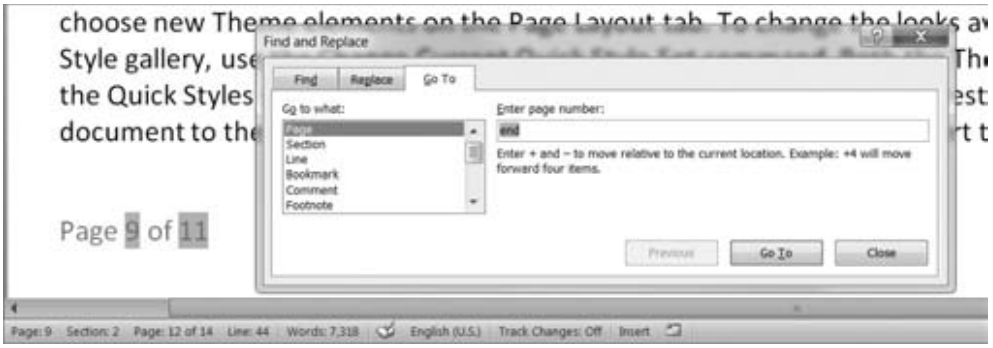
Go To Page lets you jump to any page in the current document. As with many of the Go To items, you can specify page numbers absolutely or relatively. For example, +25 would cause you to jump ahead 25 pages, while 25 would cause you to jump to page 25.

Note, however, that you can have different numbering systems in control in different sections within the same document. Suppose that your document has front matter in Section 1 numbered as i through v, , a body in Section 2 numbered as 1 through 12, and back matter in Section 3 numbered as a through c. Page 2 might refer to ii, 2, or b. Go To 2 will take you to page 2 of Section 2 if you specify nothing else, just as using ii or b in the "Enter page number" field will take you to Section 1 or 3, respectively.

Consider the Go To Page entry shown in Figure 11-16. What about page 12? There really is no page number 12, although the document actually contains 14 physical pages (three pages of front matter are unnumbered). If you enter 12 in the "Enter page number" field, Word will determine that there is no "Page 12" per se, and will instead take you to the actual 12th page, which is Section 2, Page 9, as shown at the bottom of the window.

FIGURE 11-16

Based on what you enter, Word tries to figure out the logical destination.



In addition to specifying pages in the way shown, you can also specify the section number. For example, `p2s1` would take you to page 2 of Section 1 (as would `s1p2`). Entering the word `top` takes you to the top of the current page, whereas `bottom` takes you, well, nowhere at all. For some reason Word knows about top, but it doesn't know about bottom (or `end` either, for that matter).

Section

While the "Enter page number" field is rather liberal in what it can accept, the Section counterpart isn't. Stick with actual and relative section numbers.

Line

Line numbers can be a bit confusing. Most of us don't even think in terms of line numbers, so the fact that something occurs on line 211 in the document isn't even interesting, let alone relevant. However, some folks do in fact need to know the answer to "What's my line [number]?"

Moving right along, if you refer to Figure 11-16, notice that the status bar indicates page 12 of 14 and Line: 44. Well, it's pretty clear that the document isn't really on the 44th line. Instead, it's on line 44 of page nine (or 12, depending on how you count).

Go To Line, however, uses the entire document as its source of line numbers, so if you tell it line 1, then it takes you to the beginning of the document. It doesn't help to tell it `p19l1` or `l1p19`. It throws away everything except for the last number (and any + or - that might be there with it), and takes you to that line number. Hence, `p19l1` takes you to line 1, while `l1p19` takes you to line 19. Note that the status bar won't tell you the absolute line number in the document. It will tell you only the line number on the current page.

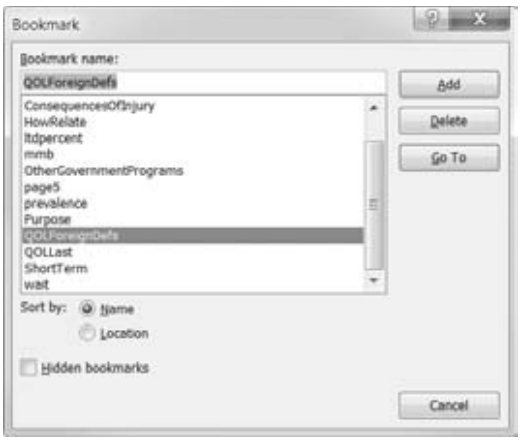
If your document skips lines by using double spacing or Before/After paragraph Spacing, that is not factored in. Word does count extra lines you create by pressing enter or Shift+Enter, page breaks, and section breaks, though.

Bookmark

Go To Bookmark is one of the items for which there is another transportation medium: the Bookmark dialog box, shown in Figure 11-17. Unlike the Go To tab's dialog box, the Bookmark dialog box is not non-modal. You cannot type or edit in the document window while the Bookmark dialog box is onscreen.

FIGURE 11-17

The Bookmark dialog box offers additional options for locating, sorting, and displaying bookmarks.



On the other hand, the bookmark dialog box does let you choose how to sort the bookmarks, as well as whether to display hidden bookmarks (more about those later). The Bookmark dialog box shows you the top dozen bookmarks, perhaps saving you from scrolling, but certainly saving you from clicking a drop-down arrow. You can also add and delete bookmarks from this dialog.

Comment

Go To Comment is another item for which Go To is not the only or best means of navigation. In the Reviewing ribbon, you have the option of navigating either via the Reviewing pane or by using the Next Comment and Previous Comment buttons in the Reviewing pane. Those provide more informed navigation as well. You can also navigate comments using the Object Browser at the bottom of the vertical scroll bar (shown in Figure 11-5).

Footnotes and Endnote

Like comments, footnotes and endnotes also have alternative and better-informed means of navigation. Moreover, if the document is onscreen, you can click on a footnote or endnote reference mark to see the Footnote/Endnote pane, or hover over the mark to read the note as a tooltip. The Go To approach can be useful, however, if someone sends you a note asking what you meant in Footnote 1546, because Go To gets you there very quickly. On the other hand, if your document contains over 1,500 footnotes, you have bigger troubles than Go To can solve.

Field

The Go To Field feature is actually pretty neat. Unlike with some of the other Go To features discussed so far, fields do not have other good means of navigation (although you can navigate fields generically using the Object Browser). What makes Go To Field special, as shown in Figure 11-18, however, is that you can filter by field type. For example, if you wanted to examine SEQ fields, REF fields, or whatever, you could limit your focus to just those.

FIGURE 11-18

Go To Field enables you to systematically examine fields of any particular type.



Table, Graphic, and Equation

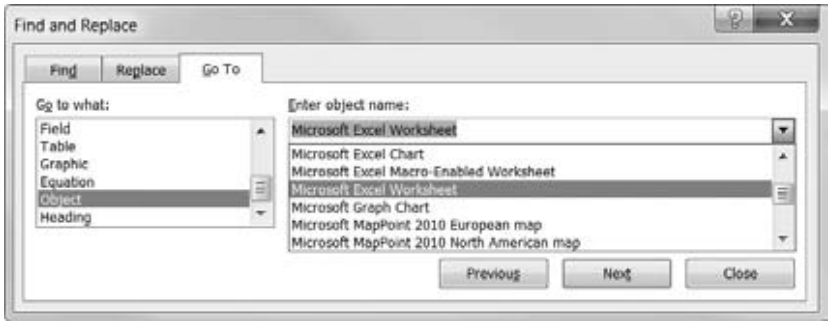
As with fields, there are no other built-in navigation systems for tables, graphics, and equations, except for the Browse Object buttons (and only for tables and graphics). Because it's non-modal, Go To can be very useful in examining tables, graphics, and equations in reports, letting you quickly survey them for formatting and structural consistency, as well as completeness.

Object

The Go To for objects offers a similar kind of functionality as that offered for fields (See Figure 11-19). It enables you to navigate by object type. For example, if you need to see each embedded Excel spreadsheet, the Previous and Next buttons provide easy access.

FIGURE 11-19

When ''Go to what'' is set to Object, you can choose the kind of object to focus on.



Heading

Like several other "Go to what" choices, the Heading choice offers less navigational flexibility and functionality than options offered by other Word features, such as Outline view and the Navigation pane.

Summary

In this chapter you've seen the ins and outs of finding, replacing, and "going to" specific kinds of items contained in Word documents. You've learned how to search using special options and operators, as well as how to use wildcards to customize your own searches. You should now be able to do the following:

- Search for and replace formatting in text
- Use keyboard shortcuts to apply selected kinds of formatting in the Find and Replace dialog box, as well as quickly clear formatting for the next search

- Use Word 2010's new Navigation pane search to more quickly find what you're looking for
- Decide when to use Go To versus other more focused navigational tools for reviewing comments, tables, and other kinds of document elements

Part III

Writing Tools

Part III of *The Word 2010 Bible* focuses on aspects of Word that can make a writer's life heaven or hell. What do you do when Word automatically corrects things that aren't mistakes? Once you've perfected your prose or formatting, what's the best Word technique for bottling your work so you can reuse it later for something else? Why is Word underlining words you type with different colors and various kinds of zigzags?

Chapter 12 begins with Word's different language tools — spell checking, grammar checking, and the thesaurus. Chapter 13 introduces new Word 2007 features — Building Blocks and Quick Parts — and shows you their relationship to AutoText. Chapter 14 shows you how to use and control AutoCorrect, a feature that can save you work by automatically fixing your mistakes as well as letting you use shorthand to blaze through tough passages that require using and reusing tedious words and phrases. Chapter 15 will tell you everything you need to know about AutoFormat, and how it can sometimes save you a lot of work. Finally, Chapter 16 will save you a trip to the eye doctor by explaining why you're no longer seeing those purple dots you might have seen in Word 2007 — and tell you how to use the now-mostly-hidden successor to SmartTags.

IN THIS PART

Chapter 12
Language Tools

Chapter 13
Building Blocks and Quick Parts

Chapter 14
AutoCorrect

Chapter 15
AutoFormat

Chapter 16
Action Options (What Happened to Smart Tags?)

CHAPTER 12

Language Tools

Word provides a variety of proofing tools, including a spelling checker, a thesaurus, and a grammar checker. Another tool included under this umbrella is hyphenation. Although technically it's not really used for proofing, the hyphenation feature enables you to make sure that hyphens are where they're supposed to be and that you don't accidentally hyphenate proper names.

Proofing — short for proofreading — is ultimately still in your hands, but judicious use of the tools that come with Word can make the job quicker and easier. Of course, if you make tons of what Word considers to be mistakes, then grammar checking, spelling checking, and pausing to use the thesaurus can make the job more tedious and time-consuming. Assuming you're right and Word is wrong, this chapter provides the information you need to temper Word's red, green, and blue editing pencils. If you don't know what's meant by that colorful sentence yet, you will by the end of this chapter!

IN THIS CHAPTER

Spelling

Thesaurus

Grammar

Research

Translation

Spelling

Word can check the spelling of a word, a selection, or a whole document. Word can include not only the main built-in word list, but also word lists you create. It can also use third-party lists such as medical, legal, and technical dictionaries. You can also format your documents using Language, which is a character-formatting attribute — proofing tools for Spanish and French come with Office 2010, making language settings (for those two, at least) more than a mere exercise.

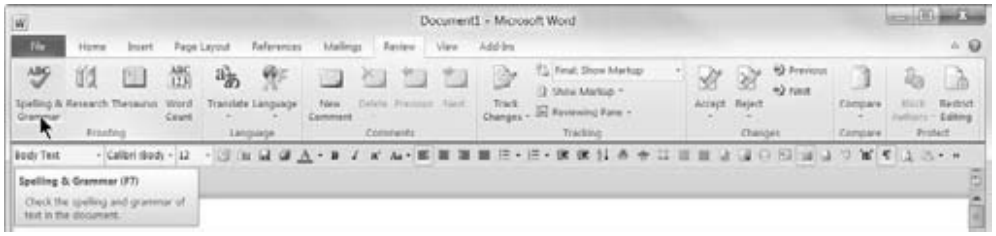
Checking Spelling

By default, Word is set to check spelling as you type. So in a sense you're already checking spelling with every word you type (unless you changed your defaults, which you'll read about shortly). There also is a formal spelling process that uses a dialog box (if your document contains spelling errors). You can trigger that process in several ways:

- Press F7.
- In the Review ribbon tab, click Spelling & Grammar in the Proofing group (shown in Figure 12-1).
- Right-click a flagged misspelling (marked with a red zigzag underline) and choose Spelling.

FIGURE 12-1

Click Spelling &Grammar at the left end of the Review ribbon to display the Spelling and Grammar dialog box.



Many users prefer the right-click method, which invokes the Spelling dialog box. If you press F7 or click Spelling & Grammar on the Review ribbon, you'll get the Spelling and Grammar dialog box instead. Of course, if the document doesn't contain any questionable spelling or grammar, you will just see a message box saying "The spelling check is complete" rather than a dialog box.

Tip

In addition to the in-your-face spelling and grammar tools, there's an additional tool that's sometimes overlooked. Right-click the status bar and click to enable Spelling and Grammar Check (if it's not already checked). As you type, a book icon appears in the status bar, with a pencil moving above it to indicate that it's actively proofing while you type. When you stop you'll see either a blue check, meaning that what you've typed is OK with Word, or a red X, meaning that Word thinks you goofed. Clicking the red X goes to the first error that Word "knows" about, and gives you a list of spelling and AutoCorrect options. ■

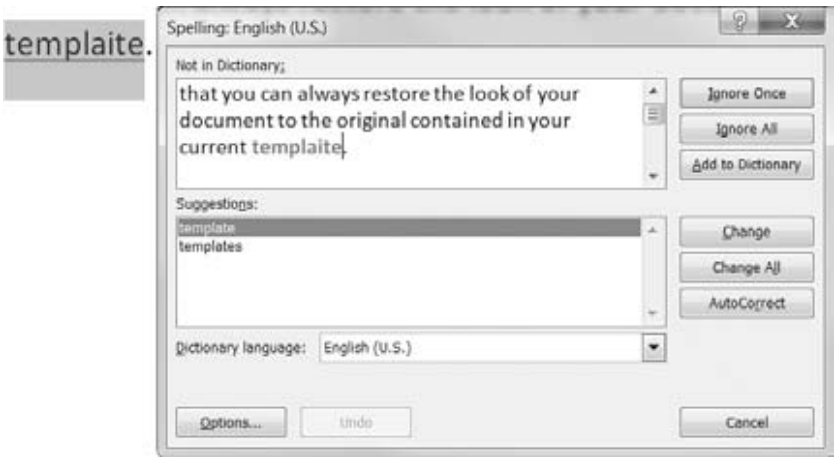
Note

Word assumes that you want to check spelling and grammar at the same time. If that assumption is wrong, you can place a separate tool on the QAT that enables you to check spelling independently of grammar. To do this, right-click the QAT and choose Customize Quick Access Toolbar. Set Choose commands from to Commands Not in the Ribbon, and scroll down and click Spelling. Click Add ➪ OK. ■

When you right-click a misspelled word and choose Spelling, the Spelling dialog box appears, as shown in Figure 12-2, and a variety of options are presented.

FIGURE 12-2

By default, Word uses a zigzag red underscore to flag words that aren't in its dictionary.



Spelling dialog choices available are detailed in Table 12-1. If multiple spelling suggestions are offered and one of them is right, select it before clicking Change, Change All, or AutoCorrect.

Note

If you make a mistake and click the wrong option (or instantly regret a choice), click in the document and press Ctrl+Z to undo it. In the case of the Ignore, Ignore All, Change, and Change All options, Ctrl+Z gets you back to where you were just prior to that last button click. If you mistakenly add the item to the dictionary or to AutoCorrect, however, then you will need to correct the personal spelling dictionary or the AutoCorrect list in order to completely revert. ■

If none of the suggestions are correct, or if the spelling or other error is so convoluted that none of Word's suggestions can fix it, you have two options. First, if none of the suggestions are correct or if a minor edit is needed to set things back on course, you can perform the edit in the Not in Dictionary box. Note that you are not limited to changing just the word that was flagged. Anything in the Not in Dictionary box is fair game. Once you have things looking as they should, choose Change, Change All, or AutoCorrect. Or, if you've given up on that approach, click Undo Edit to restore the Not in Dictionary box to its pre-editing state.

Second, because the Spelling dialog box is non-modal, you can click away from it to edit your document directly. This sometimes is necessary if the suggestions offered by Word don't

accomplish the necessary correction, especially if formatting changes are needed. When you click away from the dialog box, the top button changes to Resume. Click Resume to continue the spelling check.

TABLE 12-1

Spelling Dialog Box Choices

Cancel	Click this option to discontinue the spelling process. If ''Check spelling as you type'' is enabled, Word will continue to flag misspelled words.
Ignore Once	Skips to the next questionable spelling. Select this option if the word is acceptable to you in this context, but you still want to see future occurrences.
Ignore All	Ignores this spelling for the rest of this spell check. Select this option if the spelling used is correct in all contexts in this document.
Add to Dictionary	Adds the spelling highlighted in red in the Not in Dictionary box to the default user spelling dictionary
Change	Changes the spelling of the flagged word to the suggestion selected in the Suggestions box. Use this option if the suggestion is correct this time, but might not be correct for future instances.
Change All	Changes the spelling of the flagged word to the selected suggestion throughout the current document. Use this option if you've reluctantly decided that Word is right, and you want to be spared any additional humiliation and embarrassment.
AutoCorrect	Adds the flagged word and the selected suggestion as an AutoCorrect pair. Any time you type the flagged spelling in the future, it will be corrected automatically.
Dictionary Language	If the selected language is incorrect for the flagged word, use the drop-down arrow to select the correct proofing set.
Options	Choose this option if you want to change the settings in the main Options ➪ Proofing dialog box.

Options

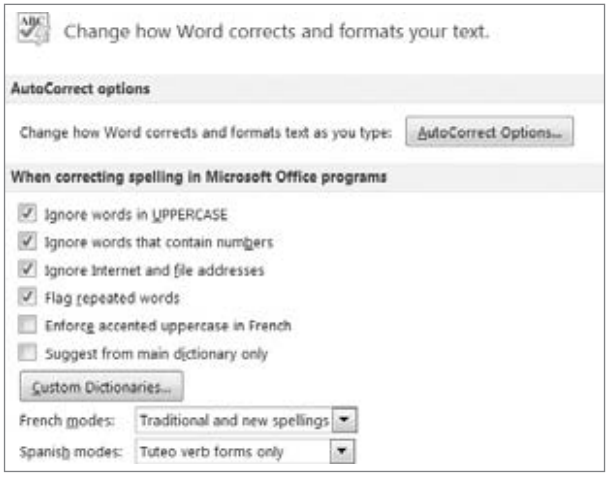
Word provides a variety of options to control proofing/spelling behavior not only in Word, but in other Office 2010 programs as well. Choose File ➪ Options ➪ Proofing tab to display the full set of options. Here we'll look only at the spelling options. AutoCorrect is described in brief in Chapter 4, and in greater detail in Chapter 14.

Correcting Spelling in Office Programs

Most of the settings are self-explanatory, but sometimes you need to be reminded that they exist. The first group of spelling options is shown in Figure 12-3. Of special use and interest to technical writers are the first three options: "Ignore words in UPPERCASE" (which handles many acronyms), "Ignore words that contain numbers" (which handles hexadecimal numbers and many variable names), and "Ignore Internet and file addresses." The latter includes not only URLs and UNC computer/disk/folder/file names, but also e-mail addresses.

FIGURE 12-3

Word provides a number of Office-wide settings that make Spelling nag you less frequently.



The fourth option is "Flag repeated words" — if your name is Dee Dee, you're probably very tired of seeing your name flagged. While I'm tempted to turn it off, hand-quicker-than-eye editing often leaves me with two copies of a word, and Word has bailed me out more times than I can count.

The fifth option — "Enforce accented uppercase in French" — does just that. If you type **Eclair**, Word will suggest that you really meant **Éclair**.

Custom Dictionaries

The last checkbox in Figure 12-3 might require a bit of explanation if you have only one custom dictionary, and you didn't even know about that one. You can have multiple custom dictionaries. Technical writers often have different "dictionaries" for different purposes and projects. While it might be OK generally to ignore words in uppercase or that

contain numbers, it sometimes isn't. Therefore, you might want to create lists of the correct acronyms or variable names, etc., so that if you type one that the list doesn't "know" about, it will alert you.

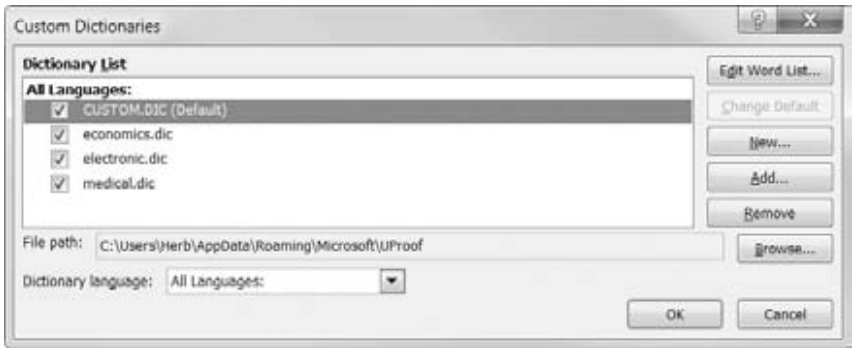
Note

I put "dictionaries" in quotes because these really aren't dictionaries. Dictionaries tell you how to pronounce words, and what they mean. Word's `.dic` files aren't dictionaries, they're word lists. You can't imagine how disappointed I was when I first discovered that Word 2.0 didn't really have a dictionary. Even the main dictionary isn't a dictionary. ■

For users who have multiple dictionaries (word lists), the "main" dictionary refers to the one that comes with Word. That's the one that's used all the time (i.e., the one that lets you know that *concieved* is never correct). Optionally, Word can populate the Suggestions box with spellings from multiple lists. Using the Custom Dictionaries dialog box, shown in Figure 12-4, you can decide which one(s) you want.

FIGURE 12-4

The default dictionary is where words you add go by default.



If you mistakenly add a word to your custom dictionary during a spelling correction, you can remove it. To remove it while performing a spell check, choose Options ➪ Custom Dictionaries. Select the desired dictionary (usually `custom.dic`), and click Edit Word List. In the editing box, under Dictionary (see Figure 12-5), select the errant word and click Delete.

You can add words as well while you're here. Type the new entry under Word(s); then click Add. When you're done, click OK, then OK again to close the Custom Dictionaries dialog box (assuming you're done).

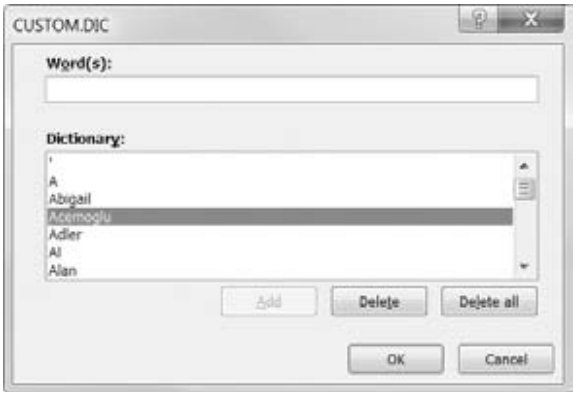
Note that you can't remove words from the main dictionary this way. Instead, you would need to create an exception list. See "Exception Lists (Exclude Dictionaries)" later in this chapter, for more on that fascinating topic!

Creating Custom Dictionaries

Note the New button in Figure 12-4. If you need a specialized word list, click New, type a name for the list, and then click Save. Back in the Custom Dictionaries list, select the new list you just created, and click Edit Word List. Initially it will be empty. Type new entries into the Word(s) box, and click Add.

FIGURE 12-5

Be careful not to click "Delete all"! That deletes all the words from the custom dictionary, and Ctrl+Z won't fix it!



Note that Word's `.dic` files are plain-text files. Therefore, you don't need to use Word to open them and edit them. Instead, you can use Notepad or any other plain-text editor. If you already have a word list, rename it, giving it a `.dic` extension, and tell Word to use it.

Tip

If you have a document that is loaded with unrecognized technical words, you can use it to create a custom `.dic` file. Open the file using Word. Next, in File ➪ Options ➪ Proofing, click Custom Dictionaries. If you already have a `.dic` file started that you want to use for the words you add, select it and click Change Default. If you want to create a new list, click New, type a name, and save it. Then select it and click Change Default. Click OK to close the dialog box.

Back in Word Options, click to enable "Check spelling as you type" and remove the checks next to "Mark grammar as you type" and "Check grammar with spelling." Make sure that "Hide spelling errors in this document only" is not checked. Click OK to save the settings.

Back in the document, press F7 to begin. At each word you want added, click Add to Dictionary. Otherwise, click Ignore All to proceed to the next word. When you're done, reopen Word Options and reset your default custom dictionary to what it was previously, and restore your preferred default spelling and grammar settings. ■

Modes

Referring back to Figure 12-3, the last two options shown are French and Spanish modes. Depending on what language pack(s) you have installed, you might also see Portuguese or other modes. Choose the mode appropriate for whatever you're writing.

Correcting Spelling in Word

Our next stop on the Options tour reveals a familiar option (to most old hands at Word), as well as a relatively new option (introduced in Word 2007) that you're going to love, when it works, both shown in Figure 12-6. Note that the grammar options are discussed a little later under "Grammar."

FIGURE 12-6

Word can check spelling as you type. It can also flag words that might be wrong for a given context.



The first option, "Check spelling as you type," governs whether Word decorates your documents with red zigzags each time you make a mistake. Turn that option off if you never make mistakes and don't like it when Word second-guesses you. You can also turn it off if you like to check your spelling in one fell swoop after you've written your ideas.

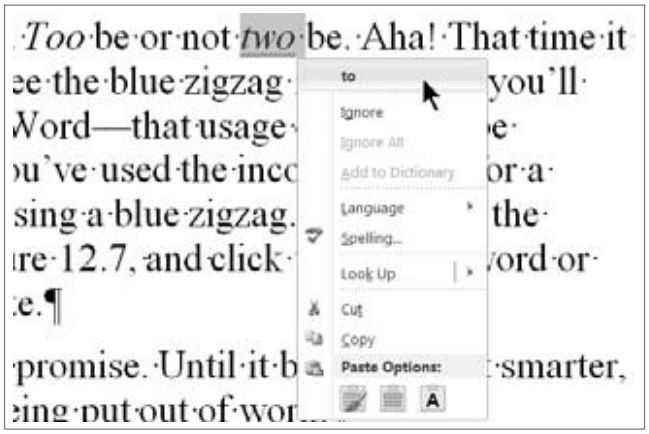
The second option, "Use contextual spelling," optimally, would realize the problem with the sentence *She kissed the towed.* Unfortunately, it doesn't. It does realize the mistake in *I will see you their*. It doesn't *reel eyes* that there's a mistake in this sentence, either. This leaves me *wandering* what it takes to make Word sit up and take notice of *miss takes*.

In any case, "Use contextual spelling" is supposed to catch those kinds of mistakes. It sometimes does, but not nearly often enough *too* suit me — although the feature is a little improved in Word 2010, compared to Word 2007. *Too* be or not *two* be. Aha! That time it did it (even though you don't see the blue zigzag in the book, you'll see it when you're working in Word — that usage of *two* will be flagged, although the incorrect *Too* will not). When Word

thinks you've used the incorrect word for a given context, it underlines it using a blue zigzag. Right-click the flagged word, as shown in Figure 12-7, and click the correct word or Ignore, whichever is appropriate.

FIGURE 12-7

Word underlines contextually questionable words using a blue zigzag line.



Clearly this feature has promise. Until it becomes a bit smarter, though, editors need not fear being put out of work.

Recheck Document

Recheck Document (referring back to Figure 12-6) appears only once you've finished checking spelling in a document. This button resets all Ignore decisions for spelling and grammar. If you previously clicked Ignore Once, Ignore All, Ignore Rule, or Next Sentence, those decisions are all reset as if they hadn't occurred. Choose Recheck Document when you inadvertently tell Word to ignore or otherwise bypass something it questioned. You'll be rewarded with the message box shown in Figure 12-8.

FIGURE 12-8

Choose File ➪ Options ➪ Proofing ➪ Recheck Document to undo any decisions to ignore words and rules.

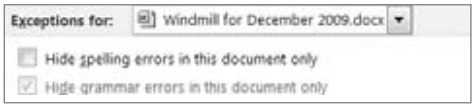


Exceptions for Current Document

Sometimes, for whatever reason, you might choose to hide all the spelling and/or grammar errors in a particular document, while continuing to monitor spelling and grammar in other open documents. Or you might generally have errors hidden, but choose to display them at other times. The "Exceptions for" settings, shown in Figure 12-9, give you independent control over the display of grammar and spelling errors on a document-by-document basis.

FIGURE 12-9

If you usually hide spelling and grammar errors, you can selectively choose to display them for individual documents.



Exception Lists (Exclude Dictionaries)

Earlier I noted that you cannot remove words from the main spelling dictionary that comes with Word. However, you can create an *exception list,* sometimes called an *exclude dictionary*. You place into that list words that Word considers correct, but that you want flagged as possible misspellings. When Word is opened, it checks whether there are entries in the exception list. If there are, then Word will flag those words as if they were misspelled, even if they aren't.

Note

Users of Word 2003 and earlier versions should note that this feature has changed slightly. The name and location of the exception file has changed. ■

During installation Microsoft creates an empty file named `ExcludeDictionaryEN0409.lex` (for English U.S.) in a folder named `C:\Users\`*`user`*`\AppData\Roaming\Microsoft\UProof` (where *`user`* is replaced by the user's name).

This file is plain text and can be edited in Notepad or any other plain-text editor. You also can edit this file using Word, but you need to remember to save it as plain text in order for it to work.

If you have an existing exception list from previous versions of Word, you can either copy existing exceptions into the new file or simply rename your existing `.EXC` list. Once you're finished, save the file to the folder indicated above. The file will be incorporated into Word's spelling regimen the next time Word is opened.

If you installed additional sets of proofing tools with Word 2010, there will be one `.lex` file in the `UProof` folder for each language. For French (France) and Spanish (Spain), the files are as follows (with variations for different versions of Spanish):

```
ExcludeDictionaryES0c0a.lex
ExcludeDictionaryFR040c.lex
```

Note that no interface is provided in Word for automatically adding entries to the exclusion lists. Addition of entries is done through directly editing the list as if it were a normal Word document, and changes do not take effect until Word is closed and restarted.

Grammar

Word provides a grammar checker to help you ensure that your writing is as clear and precise as possible. The grammar checker isn't always correct, but it's wrong infrequently enough that it can be useful. It's also flexible enough that you often can turn off specific rules that cramp your style.

For example, Word's grammar checker is pretty obsessive about passive voice. I grew up with passive voice, having been taught to write in the 1960s and having begun writing formal research articles and reports in the 1970s. Passive voice was *de rigeur*. Nobody *did* things. Things happened. It's an awfully hard habit to break, particularly when one has never become convinced that there's anything wrong with passive voice to begin with.

In any case, if you believe that passive voice is perfectly fine, you can force Word to suppress its active-voice fanaticism. You can silence Word on a number of grammar and style issues, and force it to focus only on particular areas.

Checking Grammar in Word

Running the grammar checker is a lot easier than putting up with its defaults, but because changing defaults is easy, it all works out in the end. By default, Word checks grammar as you type. If you prefer, you can turn that default off and instead have Word hold its tongue until you ask for its opinion.

Even if it's checking as you type, it's not forcing you to do anything. Instead, it underlines questionable grammar with a green zigzag. Just to quickly review, if Word doesn't like your spelling, it will zing you with a red zigzag. If it thinks you have the wrong word for the context in which you used it, it will badger you with a blue zigzag. Finally, if it doesn't like your grammar, it goads your prose with green zigzags.

To put Word's grammar engine into a more aggressive stance, press F7 or click the Spelling & Grammar tool in the Proofing group in the Review ribbon. Does that sound a lot like what you do to check spelling? Word does not have a built-in independent keystroke or tool assigned for checking grammar, but just as with Spelling, you can right-click a green underline and choose Grammar to see the dedicated Grammar dialog box shown in Figure 12-10.

Tip

Word does have independent grammar and spelling commands that you can assign to the QAT or to a keystroke. For the QAT the commands are named Grammar and Spelling. In Customize Keyboard, the commands are named ToolsGrammar and ToolsSpelling. ■

FIGURE 12-10

When checking only grammar, Word ignores egregious spelling mistakes.



As with spelling, clicking Ignore Once tells Word to ignore this one occurrence. Ignore Rule means that it will stop using the particular rule in question for the rest of this document. If Next Sentence is available, you can tell Word to simply move along and not worry about the current sentence. I often do that when the sentence contains an embedded quote that would challenge the best of grammarians.

If you agree that there is a problem and if Word's suggestion is clear and acceptable to you, click Change. You can also perform an edit in the top box and then click Change. Or, if more aggressive intervention and surgery are needed, click in the document, perform the edit directly, and then click Resume.

In Figure 12-10, Word thinks I've written a sentence fragment. Usually Word's grammar rules are clear. If you don't understand its objection, click Explain. Word displays the particular grammar rule using Word Help, as shown in Figure 12-11.

Options

If as you're checking grammar you find that Word is stopping on things you'd rather it ignored, you can tell it to turn a blind eye. In the lower left corner of the Grammar dialog box, click Options. Or, if Word is spilling entirely too much green paint as you're typing, you can intervene earlier by choosing File ➪ Options ➪ Proofing.

If you want Word to cease and desist with the green zigzags, remove the check next to "Mark grammar errors as you type," as shown in Figure 12-12. If you want Word just to stop

marking grammar errors in the current document (e.g., if it's something your boss wrote), place a check next to "Hide grammar errors in this document only." The spelling options shown were discussed previously in "Checking Spelling in Word."

FIGURE 12-11

Word uses the Help system to explain the grammar rule currently being enforced.

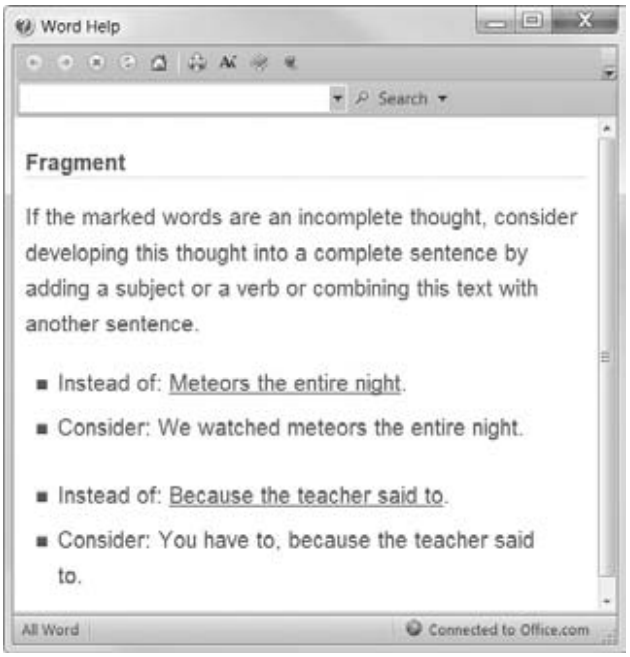


FIGURE 12-12

Word's grammar checking can be ''unbundled'' from its spell checking.



Word has two areas that come under the Grammar heading: Grammar and Style. The only two options are Grammar & Style or Grammar Only. You can get Style Only, but to do that you need to click Settings and turn off the Grammar settings one by one.

Grammar Settings

Grammar settings, shown in Figure 12-13, has 35 distinct settings. Several versions ago, Word offered its grammar rules in three built-in sets: Strictly (all rules), Business (a lot of rules), and Casual (fewer rules). You could also create up to three custom sets for specific purposes.

FIGURE 12-13

The Grammar Settings dialog box has 35 distinct Grammar and Style settings.



Alas, that's no longer the case. Now it seems that either you're expected to be able to use a single set of rules regardless of what you're writing, or you're willing to change the rules on the fly each time you edit a different kind of document. Note that Word does *not* remember sets of rules on a per-document basis.

Note

I was prepared to tell you that you could create your own distinct sets of rules by recording macros to make the settings for you. However, when I went to confirm this, I discovered (as I had feared) that the resulting macro was empty. Word 2010, it appears, doesn't "notice" those kinds of settings when recording a macro. If you want to go that route, you'll have to build the VBA macro from scratch. Or, if you still have Word 2003, you can record the macro there and then copy and paste it into the VBA editor in Word 2010. ■

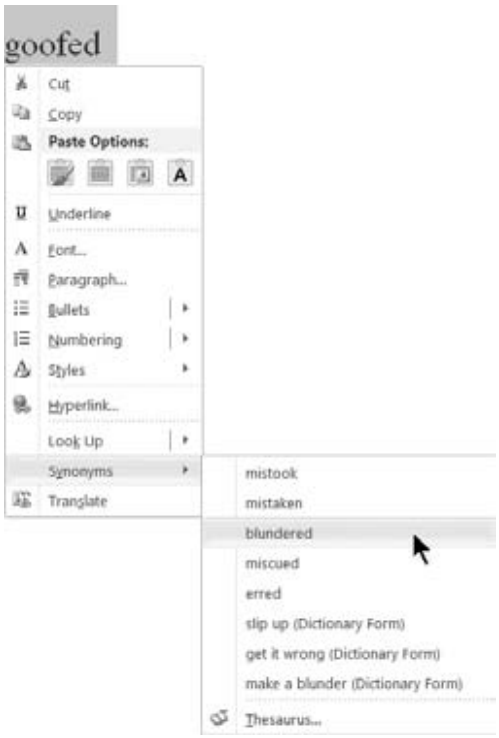
Thesaurus

One of the most entertaining of Word's proofing tools is the thesaurus. There's a version of Six Degrees of Kevin Bacon that you can play using Word's thesaurus. I'll leave the details to you.

The easiest way to engage the thesaurus is to right-click the word in question and hover over Synonyms in the pop-up menu, as shown in Figure 12-14. Clicking any suggestion offered will replace the word.

FIGURE 12-14

Use the right-click Synonyms list when you're at a loss for words.



If you want to explore more, click Thesaurus at the bottom of the pop-up menu. This will display the Research task pane, where you can explore to your heart's content. If you're not a fan of task panes, you'll be happy to know that Word's legacy Thesaurus dialog box is still available. To access it, you'll need to assign the ToolsThesaurus command to a keyboard shortcut, or the Thesaurus command to the QAT (set the Choose commands from box to Commands Not in the Ribbon).

Research

You've already seen one manifestation of the Research task pane. Word's Research can look up a wide variety of concepts using a variety of different research resources. You can look up something that's in your document, or you can open the Research task pane and use it as you would a small information browser.

Using the Research Task Pane

To look up something that's in your document, select it and Alt+Click on it. It can be a word, phrase, or name — whatever. You might use it, for example, if you come across an unfamiliar name and want to see if it's someone you should know about. It's also useful for looking up unfamiliar places.

To open the Research task pane without reference to something in the current document, click Research in the Proofing section of the Review ribbon. Type what you're looking for in the "Search for" box, as shown in Figure 12-15. Below "Search for," set the Research resource to one that is likely to provide the kind of information you're looking for, and then click the Start searching button. If you scroll to the bottom of the research pane, you'll see that All Reference Books is an option, but it's seldom as satisfactory as a more targeted resource. Note also that some of the sources — such as Factiva and HighBeam — are paid services, while Live Search is free. Encarta Encyclopedia appears to have been discontinued as a Research task pane resource, even though it is still listed as this is being written.

Research Options

To set your overall research strategy, click "Research options" at the bottom of the task pane. This opens the Research Options dialog box, shown in Figure 12-16.

Use Add Services to add a new research service. You can specify the URL of any you know about. Additionally, over time, the list of advertised services will be populated by research providers — *maybe*. At this writing, however, the Add Services list says only "No advertised services are currently available." Use Update/Remove to get the latest updates from specific servers or groups of servers, as well as to remove certain services. Note that a number of the built-in services cannot be removed, such as Translation (Installed Dictionaries).

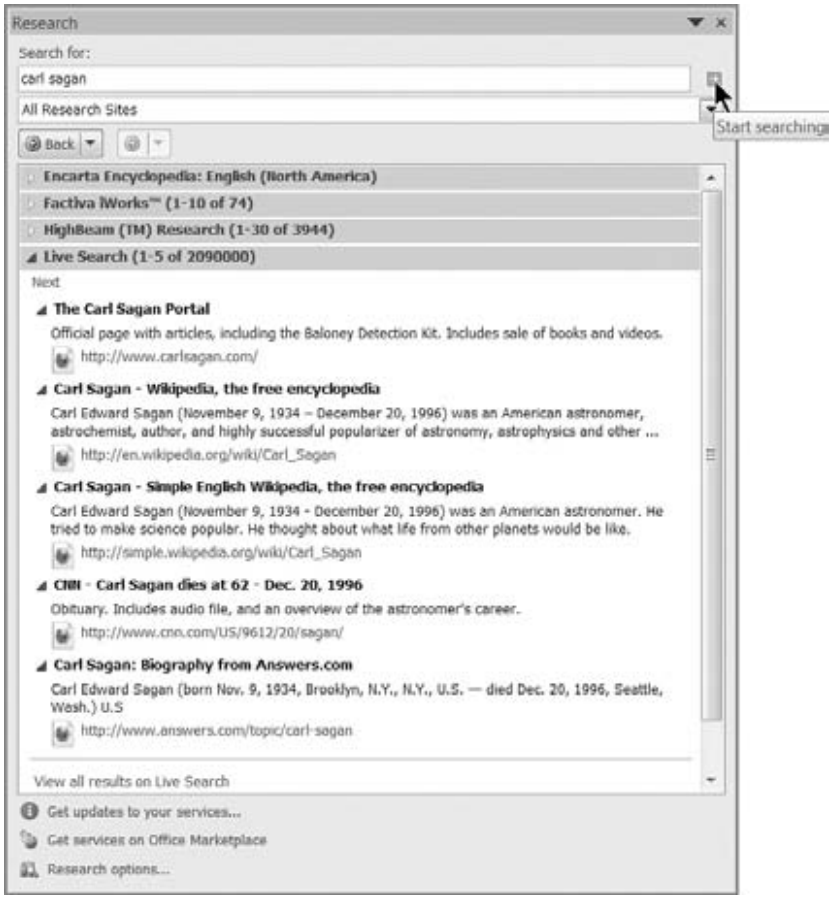
Parental Control

Parental Control enables you to limit the Research task pane to just those services that (claim to) block "offensive content." Note that you must start Word using the "Run as administrator" option in order to be able to use the Parental Control settings. To do this in Windows 7, right-click the shortcut you use to start Word, and choose "Run as administrator." If you have

Word in your Windows taskbar, first right-click on the Word icon in the taskbar, and then right-click again on the secondary Word icon under the "Recent documents" list.

FIGURE 12-15

The Research task pane puts numerous free and paid research services at your beck and call.



As shown in Figure 12-17, there are two levels of Parental Control. The first, "Turn on content filtering to make services block offensive results," is supposed to instruct all services to block offensive results (whether they claim to be able to or not). The second, "Allow users to search only the services that can block offensive results," limits services to those that claim to be able to block offensive results. Using Parental Control requires that you set a password.

FIGURE 12-16

Use Research Options to add and remove services, as well as to exercise parental control over what research services can be accessed.

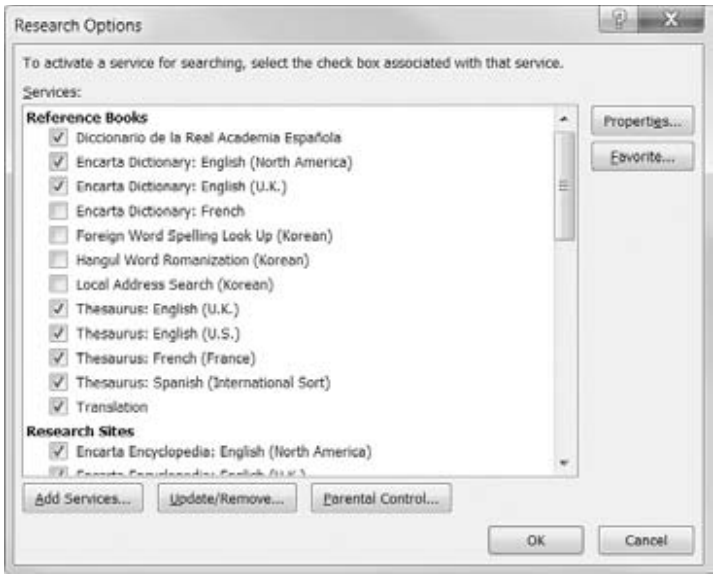


FIGURE 12-17

If you forget or lose your password, it cannot be recovered, and you'll be stuck with Parental Control!



Caution

If you use this feature, set a simple password that you can remember but that your children are unlikely to be able to guess. If you lose or forget the password, there is no guarantee that it can be recovered, unless your kids are prescient. ■

If both levels are set, noncompliant services will be grayed out in the resource list.

Translation

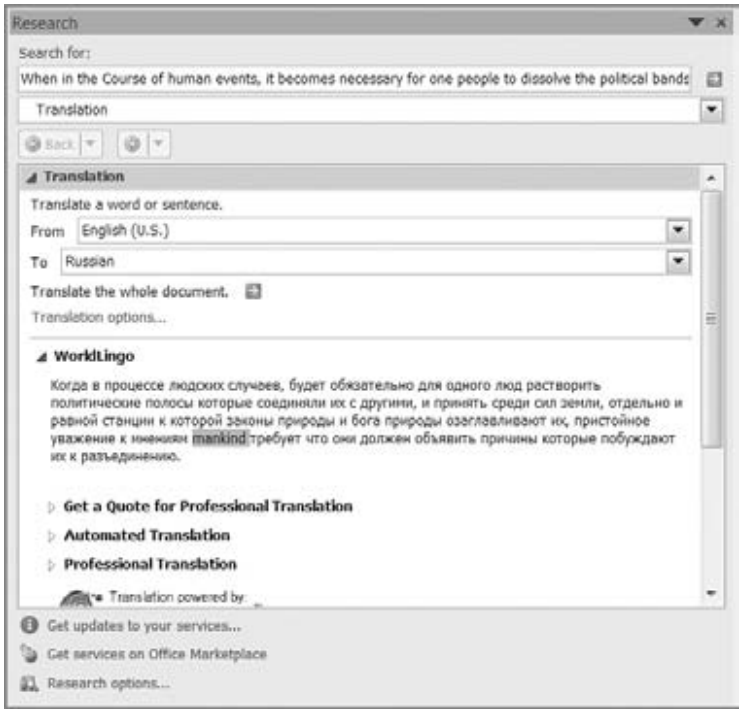
Do you have a complete report, letter, or other document you need to have translated? Word can translate it!

"Yeah, right," you say, dripping with sarcasm.

Really. It can! Shown in Figure 12-18 is the first full paragraph of the Declaration of Independence — translated into Russian! That's right — not just Spanish or French, but Russian, Hebrew, Polish, Swedish, German, Italian, Japanese, Korean, Chinese (PRC and Taiwan), Dutch, Greek, and Portuguese are available as well!

FIGURE 12-18

Word can translate whole sentences and paragraphs (up to about 50 words) in the Translation pane.



Impressed? Maybe. But get out the magnifying glass before you get too carried away. The word *mankind* apparently can't be translated. In fairness, neither can *womankind*. *Humanity* translates

just fine, though. So, perhaps we could ask Thomas Jefferson to update the wording to reflect 21st century gender-neutrality standards.

If you want the full document translated, just click the button next to "Translate the whole document." The current document is sent to WorldLingo, and the translation quickly (depending on your connection speed) appears in your default web browser.

I won't pretend that the translation is meaningful to me; my Russian is pretty much limited to да and нет. However, the Spanish translation, which I can read, looks pretty good.

Don't be fooled into thinking that a quick machine translation is perfect or as good as a competent professional translation service. However, it's certainly a leap beyond what Word 2002 could do, and it might be just what you need to translate that parking ticket you got in Italy but never paid.

Translating

To translate, select the text you want translated, right-click the selection and choose Translate. Word begins a search using the default language pair (usually from English to French). To change languages, use the drop-down arrows to set the From and To languages, and then click the Start Searching button. You can also type the text to be translated directly into the Search for: box.

You can also initiate translation using the Translate tools in the Review ribbon tab. To set the language, choose Translate ➪ Choose Translation Language ➪ Translate Document.

For simple words and phrases translated among French, English, and Spanish, Word uses its own built-in Bilingual Dictionaries. For other Western languages that use the standard Latin character set, Word uses its Online Bilingual Dictionaries. For more complex languages that use a different character set, as well as for longer passages and complete documents, Word uses the services of WorldLingo.

Mini Translator

Word can also translate using screen tips, as shown in Figure 12-19.

To toggle the Mini Translator, in the Review ribbon tab click Translate ➪ Mini Translator. To control the To language, click Translate ➪ Choose Translation Language ➪ Mini Translator. Set the "Translate to" language as shown in Figure 12-20 — the From language is taken from the current context/language setting. If you're typing in English and set the language to English, there will be no screen tip.

FIGURE 12-19

When the Mini Translator is enabled, Word translates the selected word using a screen tip.

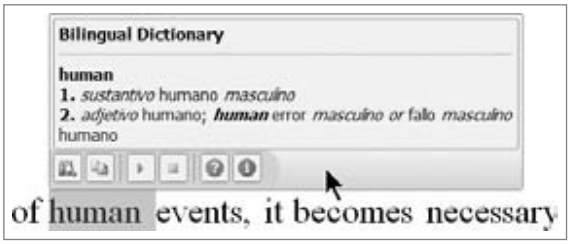


FIGURE 12-20

You can set the ''Translate to'' language for the Mini Translator.



Summary

Word's language tools provide a number of resources for writers, editors, and researchers. In this chapter you've seen that Word includes strong tools for checking grammar, checking contextual spelling, performing sophisticated research, and even achieving useful translations. You should now be able to do the following:

- Check spelling and grammar, as well as optimize options for the way you work
- Create customized word lists for technical writing, and exception lists to flag selected "correct" words as wrong
- Use Word's thesaurus to find the perfect word
- Look up important names using Word's Research task pane
- Translate words, phrases, and even whole documents

CHAPTER 13

Building Blocks and Quick Parts

Building Blocks and Quick Parts provide a gallery-like approach to boilerplate content. The basic idea is to provide you with a menu of ready-to-use document parts that you can use to quickly develop a finished document.

Rather than making you slave away for hours trying each of the different formatting options to achieve the desired look, Word provides a number of ready-made document parts in which the bulk of the work has already been done for you.

Moreover, if none of the prefabricated Building Blocks suits your needs, you can modify them or design your own from scratch. Once you have slaved away, the Building Blocks feature enables you to save your work investment quickly and easily by adding it to the Building Blocks Gallery. The Building Blocks feature also enables you to name and categorize the parts you create, as well as place them into any of a number of galleries.

IN THIS CHAPTER

- Building Blocks
- Quick Parts
- What happened to AutoText?
- Backing up and sharing Building Blocks
- Using fields with Building Blocks

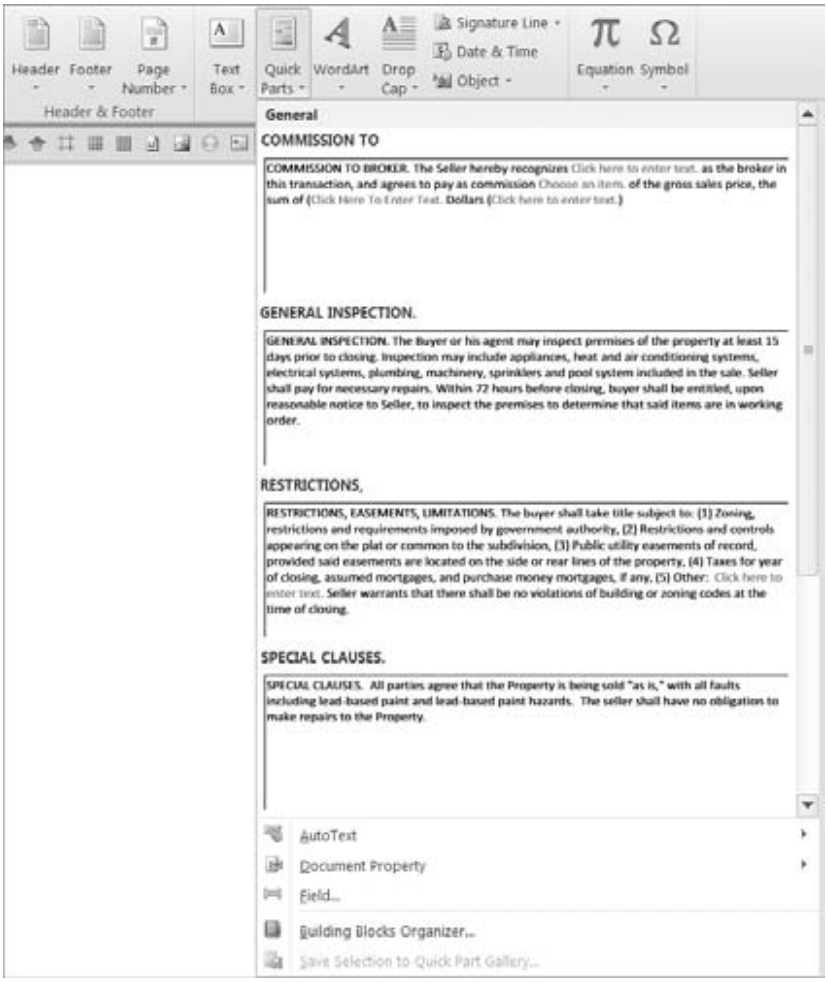
Using Quick Parts and Building Blocks

To insert a Quick Part into your document choose Insert ➪ Quick Parts. If you have added any Quick Parts to Word, they are listed in the Quick Parts Gallery, as shown in Figure 13-1, at the top of the Quick Parts drop-down menu.

If you see what you want, click it to insert it into the current document. Or, for more precise control over how it's inserted, right-click the item for the list of options shown in Figure13-2 .

FIGURE 13-1

Selections you save to the Quick Parts Gallery are displayed at the top of the Quick Parts drop-down menu.



Tip

If you know the name of the Quick Part or Building Blocks Gallery item you want to insert, type enough of its name that it won't be confused with something else, and then press F3. This works the way AutoText entries did in Word 2003 and earlier (see "Whither AutoText and AutoComplete?" below). If pressing F3 doesn't insert the item, type a little more of it. If you have two items named Calendar 1 and Calendar 2, you'll need to type the full name of either. If one is named 1Calendar and the other is named 2Calendar, however, you can save yourself some typing by entering only 1c or 2c (unless you have other gallery items that begin with those characters). Note that F3 works on all Building Block items, not just those in the Auto-Text Gallery. ■

FIGURE 13-2

The right-click menu provides a number of different ways to insert a Quick Part.



Building Blocks versus Quick Parts

Are you confused about the distinction between Quick Parts and Building Blocks? Don't be. Quick Parts are a special subset of Building Blocks. If a Building Block belongs to the Quick Parts Gallery, it will appear in the drop-down menu when you click Quick Parts in the Insert ribbon. Items assigned to other galleries (tables, equations, headers, etc.) must be accessed through the full Building Blocks Organizer.

How do you decide what to assign to the Quick Parts Gallery? It's entirely up to you into which gallery you put something. However, you probably want to limit the Quick Parts Gallery to items you need more frequently and for which you need more flexibility regarding insertion location (see Figure 13-2), as Quick Parts offer more insertion options than do other Building Blocks.

Warning

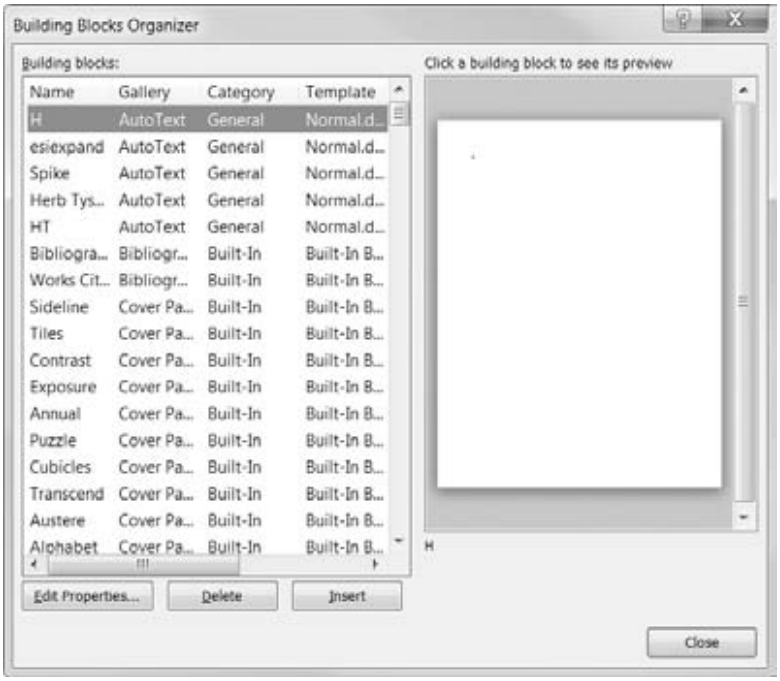
If you work in compatibility mode, Building Block features work in the current document only as long as it is open. If you attempt to save Building Block items to a legacy `.dot` file, however, the file will revert to an AutoText entry and will not appear in the Quick Parts Gallery the next time that document is opened. This might look like a bug, but it's not. Legacy `.dot` files do not have the means to store and use gallery information, as those features do not exist in the `.dot` file specification. ■

Building Blocks Organizer

If what you want isn't in the Quick Parts Gallery, choose the Building Blocks Organizer to view the entire range of what is available, as shown in Figure 13-3. Click any of the headers — Name, Gallery, Category, or Template — to sort the list.

FIGURE 13-3

Use the Building Blocks Organizer to change, delete, and insert Quick Parts.



Click the item you want to insert and then click Insert. Note that when you insert in this way you don't have the array of options shown in Figure 13-2. Instead, the item is inserted in the way that was specified when it was created or added to the Building Blocks Gallery (content only, content in its own paragraph, or content in its own page).

Note

Note that some Building Blocks are automatically inserted into headers or footers (as page numbers, for example), while others are inserted at the insertion point. For Building Blocks supplied with Word, the gallery name tells you where the item will be inserted. For example, three items are named Accent Bar 1, and each is in a different gallery: Page Numbers (Bottom of Page), Page Numbers (Top of Page), and Page Numbers. There are two additional items with similar names: Accent Bar, Left and Accent Bar, Right. Those two are in the Page Numbers (Margins) Gallery. ■

Adding a New Building Block or Quick Part

Adding a new Quick Part or Building Block is easy. If you have text, URLs, structures (tables, pictures, charts, content controls, etc.), and so on that you frequently reuse in different documents, you can save time and effort by saving them as distinct Building Blocks or Quick Parts.

Moreover, using Building Blocks can help prevent mistakes and embarrassment. Have you ever inadvertently transposed two letters in your own company's URL? Have you ever mistyped a contract clause, leasing a building for ten years instead of one? By using Quick Parts you won't risk random careless errors. Instead, you make the same consistent errors each time! Well, if you insert the wrong thing into the gallery you do; but you won't do that, will you? You will carefully proofread what you add to the gallery so you don't shoot yourself in the foot later.

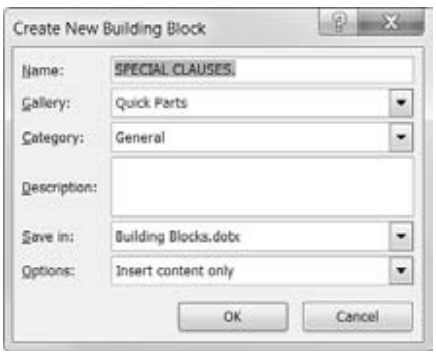
Tip

Rather than create Building Blocks from scratch, open a document that contains elements you'd like to reuse. Select the element and then add it to the appropriate gallery. ■

Once you've created and formatted or otherwise come up with something you want to save as a gallery item, select it. Then choose Insert ➪ Quick Parts ➪ Save Selection to Quick Part Gallery. This opens the Create New Building Block dialog box shown in Figure 13-4.

FIGURE 13-4

If you organize your Building Blocks when you create them, they will be easier to find and use later.



Note

The Save Selection to Quick Part Gallery command is really a misnomer. You're not saving to the Quick Parts Gallery. You're creating a new Building Block, which you optionally can save to the Quick Parts Gallery, if desired. ■

In the Name field, type a name to use for the Building Block. As indicated earlier, if you have a series of items you intend to call Item 1, Item 2, and Item 3, it's better planning to call them 1Item, 2Item, and 3Item so you can use F3 shortcuts more efficiently. Note that omitting the space in the name increases the chances of creating unique and unambiguous names for quick insertion using the F3 shortcut.

Galleries

In the Gallery box, choose one of the gallery names provided. To have the item appear in the gallery portion of the Quick Part drop-down menu, add it to the Quick Parts gallery. You should reserve this "privilege" for items you need frequently and for which you need insertion flexibility.

In choosing which gallery to use, make sure that you don't add items intended for a specific document area to the wrong gallery (for example, don't put a header item into the Footers gallery). You also should be consistent in order to make it easier to find things later. Note that you cannot create new gallery names. It's not a bad idea, however, to put things that are purely text into AutoText, and actual structures into the appropriate gallery (Tables, Text Boxes, Headers, Footers, and so on).

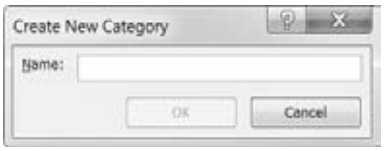
Note that all Building Block items can be inserted with most AutoText methods, even if they aren't in the AutoText gallery. One exception, however, is that only items in the AutoText gallery can be inserted with the AutoComplete feature. More on this shortly.

Categories

Using the Category box, you can add your own organizational scheme. The default single built-in category for user-created Building Blocks is General. Don't use that category. Instead, click the arrow next to General, and choose Create New Category. In the Create New Category dialog box shown in Figure 13-5, type a descriptive name that will help you stay organized. If you dump everything into General, you'll quickly find yourself with too many generals and not enough sergeants.

FIGURE 13-5

Categories can help you find Building Blocks more quickly later.



Description

In the Description box, if the Building Block is a structure or non-text object of some kind, write a little about what it is and where you'd use it. If the Building Block is a text item, before you summon the Create New Building Block dialog box, it's not a bad idea to copy the text into the clipboard, and then paste it into the Description box. The text itself can serve as an excellent description.

Choosing a Storage Location for Building Blocks

In the "Save in" box, the default location usually will be `Building Blocks.dotx`. This file usually is located in `C:\Users\[user]\AppData\Roaming\Microsoft\Document Building Blocks\1033` (or its `\14` subfolder). However, you can instead choose to store Building Blocks in the template on which the current document is based, `Normal.dotm`, in any other currently loaded global template, or in a new `.dotx` file you create just for this purpose.

Tip

To create a new file for storing Building Block items, create a new blank document and save it as a `.dotx` file in `C:\Program Files\Microsoft Office\Office14\Document Parts\1033`. It will then be included as a "Save in" location when you store new Building Block items. ■

Options (Insertion Behavior)

Use the final setting, Options, to choose a default insertion method for the Building Block you're adding. Insert Content Only inserts the Building Block at the insertion point. You can also choose the default to insert the Building Block into its own paragraph or page. Of course, if you put the item into the Quick Parts Gallery, you have the additional insertion options shown in Figure 13-2.

Whither AutoText and AutoComplete?

If you upgraded from an earlier version of Word, you might be wondering what happened to AutoText. In File ➪ Options ➪ Proofing ➪ AutoCorrect Options, the AutoText tab is gone. It's also gone from the Organize dialog box (Developer ➪ Document Template ➪ Organizer). AutoText was subsumed by Building Blocks.

Word 2007 AutoText users were chagrined to learn that the venerable AutoComplete feature had been removed for AutoText gallery items (although it did work for dates). AutoComplete causes a tooltip to appear after you type enough of an AutoText entry's name that Word recognizes it. You can then complete the insertion by pressing enter at that point.

It was removed from Word 2007 because the numerous built-in Building Blocks entries were causing AutoComplete tips to appear too often. If you upgraded to Word 2010 from Word 2007, you might be wondering why I described the feature in the present tense in the preceding paragraph. That's because *AutoComplete is back!*

Because of a lot of chagrin (translation: complaints), in Word 2010 Microsoft has restored AutoComplete for Quick Parts that are stored in the AutoText gallery. AutoComplete once again works — for both dates and AutoText gallery items.

Tip

If AutoComplete does not work for you, there are two things to check. First, in File ➪ Options ➪ Advanced ➪ Editing Options, Show AutoComplete suggestions must be enabled. Second, because of a longstanding bug in Word, AutoComplete will not work if the window and/or text is sized such that the horizontal scroll bar appears. If neither of these two conditions is not the problem and AutoComplete still doesn't work, verify that File ➪ Options ➪ Advanced ➪ Display ➪ "Show horizontal scroll bar" is enabled. ■

If you upgraded from Word 2003 or earlier, you should now find your AutoText entries in the AutoText section of the Building Blocks Organizer. Note that these include not only user-created AutoText entries but also many that came with Word 2003 and earlier.

Formatting

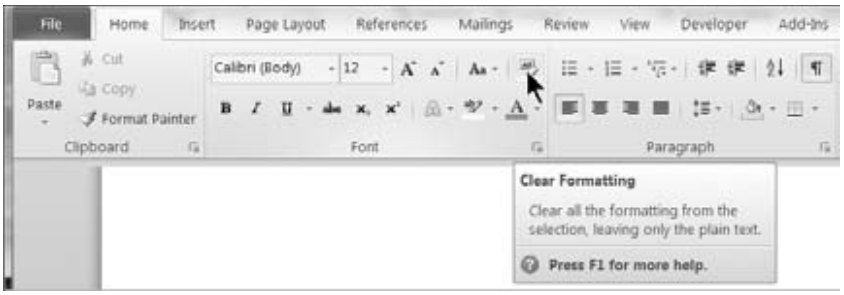
Word does not provide a way to store or insert AutoText entries as plain text or unformatted. If you have a Building Block item that you want to insert, but need to suppress the formatting, you will have to use other means.

If you want Building Block items to be inserted in the most vanilla way possible, clear all formatting from the selection before adding it to the Building Blocks organizer. Or, on an ad hoc basis, you can selectively remove the formatting after inserting the item.

Either way, a favorite new way to strip formatting from a block of text is to use the Home tab's Clear Formatting tool, shown in Figure 13-6.

FIGURE 13-6

Use the Home tab's Clear Formatting tool to remove formatting from a Building Block item, if necessary.



Note that the Pasting settings in File ➪ Options ➪ Advanced ➪ "Cut, copy, and paste" do not affect the way Building Block items are inserted.

Building Blocks: Need to Know

Working with Building Blocks can make you more productive. Initially setting things up might take a few extra minutes of thought and care, but ultimately the extra organization will yield dividends. Of course, if you're going to invest the time to create and enhance a resource, you're going to want to know how to protect that investment, as well as how to share the resource with others.

Backing Up

Building Blocks can be stored in any template that is accessible in the current document window. A template is currently accessible for any of five reasons:

- It is a Building Blocks template located in your Building Blocks folder. This folder usually is named `C:\Users\[user]\AppData\Roaming\Microsoft\Document Building Blocks\1033\14`. The default storage vessel is named `Building Blocks.dotx`.
- It is `Normal.dotm` (stored in the location specified in File ➪ Options ➪ Advanced ➪ General section ➪ File Locations ➪ "User templates," usually `C:\Users\[user]\AppData\Roaming\Microsoft\Templates`.
- It is attached to the current document and is a template other than `Normal.dotm`.
- It is a global template located in your start-up folder. You can choose the location of the start-up folder by choosing File ➪ Options ➪ Advanced ➪ General section ➪ File Locations ➪ Startup. The default location in Windows XP usually is `C:\Users\[user]\AppData\Roaming\Microsoft\Word\STARTUP`.
- It is open in the current document window.

To find out where all the currently available Building Blocks are stored, in the Insert ribbon choose Quick Parts ➪ Building Blocks Organizer. Drag the header borders as necessary so that you can see the complete template names, as shown in Figure 13-7. Note that if you did not upgrade from an earlier version of Word, the number of AutoText items from `Normal.dotm` might be considerably smaller.

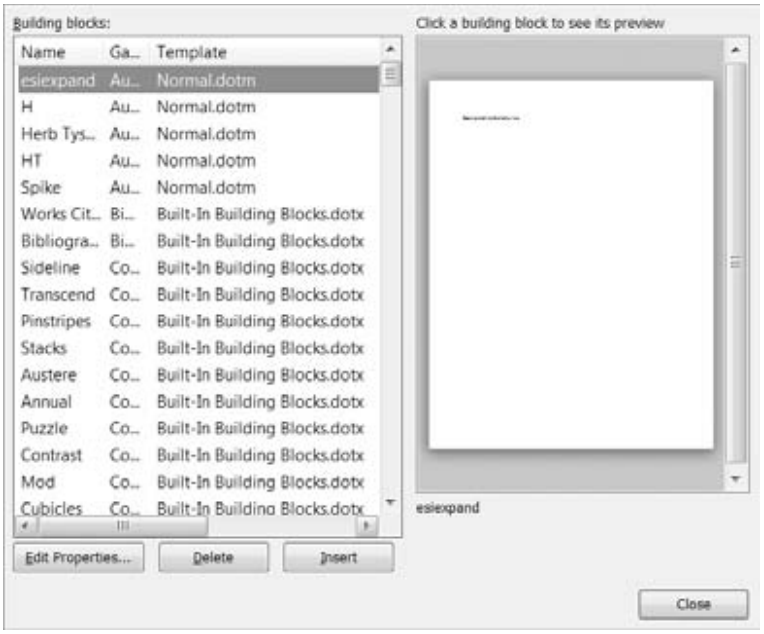
To back up your Building Blocks, back up all the template(s) where they are stored. Note that files cannot be backed up while they are in use, so once you determine the name and location of the template(s) you need to back up, you need to close Word, use Windows Explorer to navigate to the location(s) of the template files, and copy them elsewhere (tape, backup drive, network backup location, CD, DVD, or other target).

Warning

If Always Create Backup Copy is enabled (File ➪ Options ➪ Advanced ➪ Save), Word will create a backup version of your `Building Blocks.dotx` file. Note that this is automatic, however, and occurs each time a change is made to your Building Blocks collection. Hence, it's possible to quickly leave the original version behind in a trail of dust, rendering it fairly useless as a predictable or known backup. ■

FIGURE 13-7

The Building Blocks Organizer shows the template locations where all currently available Building Blocks are stored.



Sharing

When you start developing Building Blocks, particularly ones you plan to share with others, it can be useful to deliberately create a new `.dotx` file to store your Building Blocks. To share a Building Block, give it a name other than the default `Building Blocks.dotx`. It's not a bad idea to date it too, so that someone to whom you give it will have a reference point with respect to earlier Building Block template files. For example, I might give one the name `Herb Tyson Building Blocks 7-7-2010.dotx`.

To create such a file, create a new blank document and save it in `.dotx` format — preferably in the default storage location for user Building Blocks files (see "Choosing a Storage Location for Building Blocks" earlier in this chapter). Then specify this file as the "Save in" location for Building Blocks you wish to share.

You can then copy this file across a network, copy it to CD/DVD or other removable media, or e-mail it to others. To use it they should copy it to their own Building Blocks folder. This typically is `C:\Users\[user]\AppData\Roaming\Microsoft\Document Building Blocks\1033`.

In sharing this file with others, make sure that they copy it to the Building Blocks folder, and that they do not replace their own local copy of `Building Blocks.dotx` with it.

Note

In the preceding file path, `1033` is the default location for English (U.S.) files. For Spanish, French, and other languages the number will be different. ■

Copying Building Blocks

There is no built-in way to copy Building Blocks from one template to another en masse, but there is a way to move them one at a time. If you make a throwaway copy of the source file before moving the Building Blocks, you can simply discard it at the end of the process.

First, make a backup copy of both the source and destination templates. The destination template can be a new blank `.dotx` file stored in the default Building Blocks folder (see previous section). In the case of the source, this is not a mere precaution, because the process actually removes Building Blocks from the source file. Make a throwaway copy of the source that you will use for this process, and maybe even name it `throwaway-copy-source.dotx`.

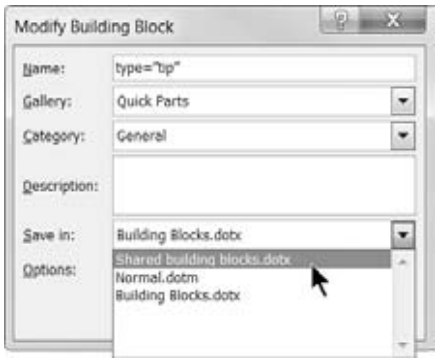
Second, make sure that both the destination template and the throwaway copy of the source are available. You can do this by putting both into the Document Building Blocks folder (`C:\Users\Herb\AppData\Roaming\Microsoft\Document Building Blocks\1033`).

Third, choose Insert ➪ Quick Parts ➪ Building Blocks Organizer. Sort by template so you can focus your efforts only on the throwaway copy of the source file. Remember that any entry you change here will actually move the Building Block entry, not merely copy it.

Select an entry you want to move and click Edit Properties. In Modify Building Block, click the arrow next to "Save in" to access the drop-down list of available template locations, as shown in Figure 13-8. Set the "Save in" template to the destination to which you want the entry moved.

FIGURE 13-8

You can move Building Block entries between templates by changing the ''Save in'' template.



Lather, rinse, repeat. One at a time, select each entry you want to move. At the end of the process all the entries will now reside in the new "Save in" location.

Using Building Blocks with the AutoText Field

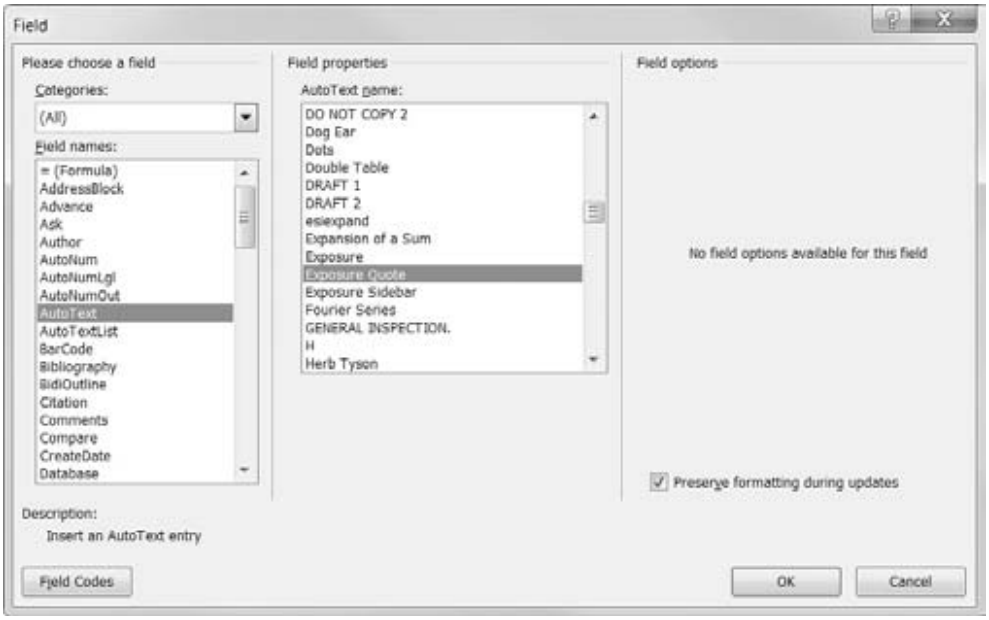
Although they've renamed the feature from AutoText to Building Blocks, Word's basic infrastructure still treats Building Block entries the same way that Word 2003 and earlier treated AutoText entries.

This means that in addition to inserting Building Blocks into your documents in the manner indicated in this chapter, you can also insert them using the AutoText field — not just items in the AutoText Gallery, but *all* Building Blocks. Suppose, for example, that you have a series of templates in which the identical Building Block name is used for a variety of different formulations of the same concept. For example, you might have a Building Block entry named Exposure Quote. In one template it might say one thing, in another something else, and in a third template still something else.

In place of an actual exposure quote in a document, however, you could instead use an AutoText field to refer to the Exposure Quote Building Block. That way, whenever the Building Block for the underlying template changes, the Exposure Quote in all documents based on that template changes as well, simply by your updating the field in the document.

FIGURE 13-9

AutoText entries can be inserted by reference with a field.



To use a field rather than insert the actual Building Block itself, choose Insert ➪ Quick Parts ➪ Field. The dialog box shown in Figure 13-9 will appear. With Categories set to All, under Field

Names click on AutoText. Under "AutoText name" select the Building Block name you want to use, and click OK.

Note that even though the dialog box says AutoText, this method works for all Building Blocks. Fields are discussed in detail in Chapter 21.

Summary

In this chapter you've learned about Word 2010's Building Blocks feature. You've also learned about Quick Parts and the relationship between these new features and the legacy AutoText feature. Among other things, now you know the following:

- How to create your own Building Blocks
- How to make some Building Blocks appear in the Quick Parts Gallery
- How to back up your Building Blocks
- How to share your Building Blocks
- How to move Building Blocks from one template to another
- Why AutoText's AutoComplete feature sometimes doesn't work
- How to use fields to insert dynamic copies of Building Blocks that change when the underlying Building Blocks change

CHAPTER 14

AutoCorrect

AutoCorrect refers to Word's capability to automatically change what you type into something else. What's that? You thought that *that* was called editing? Nah. That's something else entirely.

AutoCorrect actually refers to a collection of features that all reside under one umbrella. At its most basic level, even without your doing anything, Word can correct typos just as quickly as you can type them. If you type **recieve,** practically before you can blink, Word changes it into *receive*. Well, I lied. There is something you have to do for it to work. You have to add some kind of word separator, such as a comma, space, period, slash, dash, quotation mark, or any of a host of other characters, to signal to Word that you've finished typing that word. In fact, it took effort to keep the incorrect version of *receive* from being AutoCorrected. Let's hope the editors realize that it was deliberately misspelled and don't fix it!

IN THIS CHAPTER

Built-in versus do-it-yourself AutoCorrect

Plain text versus formatted AutoCorrect

AutoCorrect limits

Math AutoCorrect

Built-in Corrections

Word comes with a host of built-in AutoCorrect pairs — common misspellings and their corrected counterparts. By default, Word uses them to correct your mistakes. For example, if you type **abscence,** Word corrects it to *absence*. This is different from spell checking — which highlights suspected misspelling, but does not automatically correct them. (As pointed out later in this chapter, the two features sometimes converge, in that you frequently have an opportunity to automatically add a flagged misspelling and suggested correction as an AutoCorrect pair.)

Word's built-in list of AutoCorrect pairs is by no means exhaustive, though, so many misspelling are not automatically corrected — particularly when there are competing possibilities about what the intended word might be.

For example, if I type *intented*, Word will flag it as a misspelling. But, because I could have meant indented, intended, or invented — to name a few — Word does not automatically correct it.

Word has additional AutoCorrections it can perform as well. They are shown in Figure 14-1. To display this dialog box, choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options. The meanings of most of these are perfectly obvious. Two require some explanation.

FIGURE 14-1

AutoCorrect refers to a number of different settings.

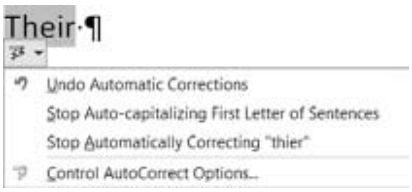


The meaning of "Show AutoCorrect Options buttons" might not be perfectly obvious to you if either it never happens to you or you never notice it. After an AutoCorrect occurs, if you hover the mouse over the correction, an AutoCorrect button appears at the left edge of the corrected word. It's a thin blue rectangle. Microsoft's aim was to make it unobtrusive. For some users it's so unobtrusive that they hardly ever even notice it.

If you hover the mouse pointer over the rectangle, it suddenly sprouts a lightning bolt and a tooltip that says AutoCorrect Options. If you click the lightning bolt you see options similar to those shown in Figure 14-2.

FIGURE 14-2

Word sometimes performs multiple corrections at the same time.



If "Show AutoCorrect Options buttons" is enabled, Word remembers the locations in the current paragraph where AutoCorrect actions occurred. You can click the button for any of them to undo a correction, to suppress a rule, or to access AutoCorrect Options. If AutoCorrect made multiple corrections at the same time (as shown in Figure 14-2), the top option, Undo Automatic Corrections, enables you to undo all of the corrections in one step.

Tip

If all this mousing around and hovering annoys you, you can always immediately press Ctrl+Z to undo the most recent correction. However, if you kept typing after the correction occurred you will have to press Ctrl+Z several times, as you will have to undo the subsequent typing before you can undo the AutoCorrection. You'll have to decide how much retyping you're willing to do. ■

Replace Text as You Type

The core AutoCorrect feature for most users is "Replace text as you type." Using hundreds of built-in AutoCorrect pairs, when this feature is enabled it automatically replaces misspelled words with their correct counterparts. Common default AutoCorrect Replace/With pairs include accross/across, realative/relative, questiom/question, and teh/the.

To add a Replace/With pair to AutoCorrect, choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options. In the Replace box, type the incorrect version or shorthand you want to replace. In the With box, type the replacement text you want to use. The With text can be up to 255 characters, including spaces. Click Add ➪ OK.

Word doesn't just make corrections, though. It also replaces common substitutions for actual characters, such as (c)/© and (tm)/™.

Many Word power users capitalize on this feature to create shorthands for longer words and phrases that are tedious to type and retype. If you're a lawyer, you might have encountered such memorable phrases as *party of the first part* and *party of the second part*. One lawyer I know hates those phrases, but uses them because they're expected. She created AutoCorrect entries that automatically replace p1, p2, and p3 with "party of the first part," "party of the second part," and "party of the third part," respectively. Now, when she needs one of those, she simply types the appropriate shorthand.

When I'm typing a book or a report, I frequently encounter longish words and phrases. Along about the third time, though, I press Ctrl+Alt+Shift+C (my shortcut key for AutoCorrect

options; see "AutoCorrect" in Chapter 4), and add the tiresome item to my AutoCorrect list. For this book, for example, `ac` automatically expands to AutoCorrect, `autt` expands to AutoText, and `qsg` automatically expands to Quick Style Gallery. With each new concept I cover, the AutoCorrect glossary grows.

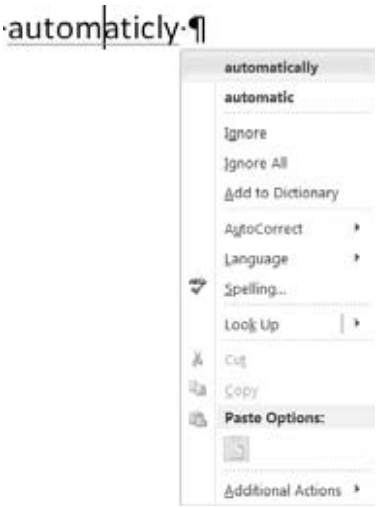
AutoCorrect from Typos

Another method for creating AutoCorrect entries is on-the-fly whenever you make a typing mistake that Word doesn't automatically correct. For example, if you type **automaticly,** it's pretty certain that you really mean *automatically*. Nonetheless, Word doesn't automatically correct it. Instead, assuming that "Check spelling as you type" is enabled, Word will underline the word *automaticly* with a red zigzag.

To convert typos to AutoCorrect entries, right-click the flagged misspelling. Word displays the context menu shown in Figure 14-3. In the menu, choose AutoCorrect ➪ *correct spelling of mistyped word*. Word adds the pair — the flagged word and the correction — to the AutoCorrect list.

FIGURE 14-3

Right-click a flagged misspelling to convert it into an AutoCorrect entry.



Plain Text versus Formatted Text

If you enter complete Replace/With pairs using the AutoCorrect dialog box, Word records the With text as unformatted. When the text expands, it takes on the formatting of the surrounding text.

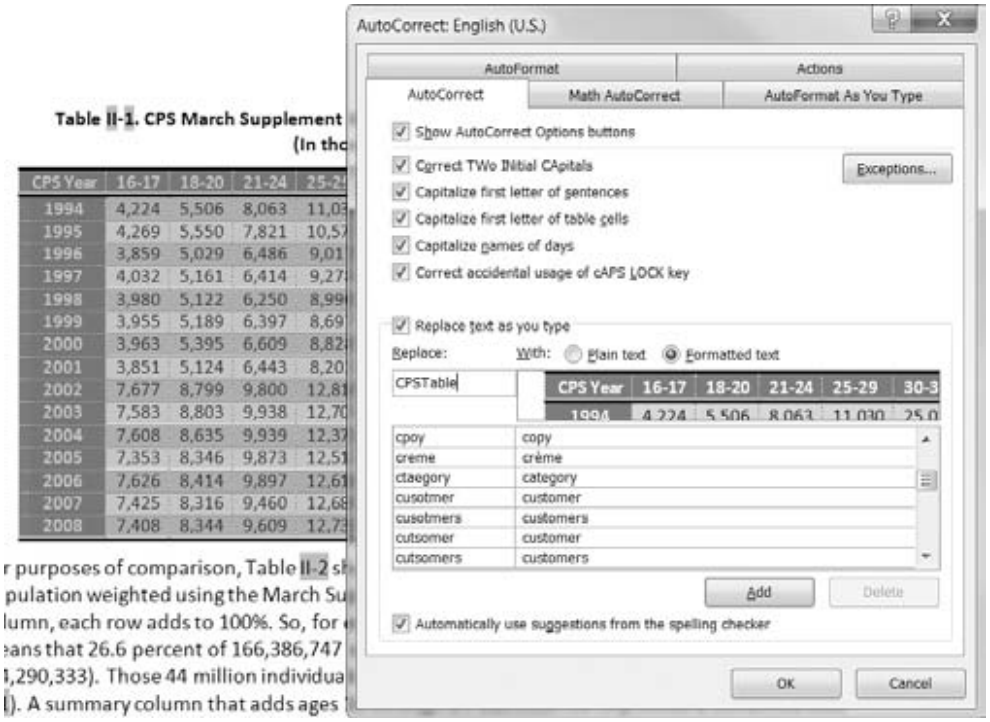
Sometimes, however, you might want formatted text. You might even want something other than pure text, such as a table or a picture. Or perhaps you do want plain text, but have a With item that exceeds 255 characters. For these, you need to use a formatted item.

To create a formatted Replace/With AutoCorrect pair (only the With item is formatted), first select what you want to use as the With item. Then display the AutoCorrect dialog box (File ➪ Options ➪ Proofing ➪ AutoCorrect Options), a QAT (Quick Access Toolbar) shortcut, or a keyboard shortcut. As shown in Figure 14-4, Word attempts to preview the With item. Here a table is previewed. If the selected item is a picture or other graphic, the preview will be empty.

In the Replace box, type a name for the item. It can be up to 31 characters. Keep in mind that this name will automatically expand into the With item when you type it into a document, so don't make it so complicated that you can't remember it, but don't use existing words or common abbreviations or acronyms that you ordinarily use either. When I want to use a common word or abbreviation, I add a number to it.

FIGURE 14-4

Word tries to preview the selected formatted item.



AutoCorrect Limits

Word 2010 does not have any arbitrary limits on how many AutoCorrect entries you can create. Nor are there arbitrary limits on how large a formatted With entry can be. You are limited only by the amount of available memory and disk space. If Word runs out of either, it will tell you.

However, few users run into limits, even when they include entire large documents as AutoCorrect entries.

On the other end of the spectrum, for plain-text entries, as noted earlier, the size of the With item cannot exceed 255 characters. That is the usual limit on textbox entries in Windows applications.

For both formatted and plain-text entries, the Replace entry cannot exceed 31 characters. As a practical matter, it's hard to imagine why you'd ever want it to get anywhere near that large. Most AutoCorrect aficionados tend to prefer terse letter-and-number combinations that give some idea about the nature of the item as an aid to memory. Keep in mind that unlike with Building Blocks there is no dialog box or gallery mechanism for inserting AutoCorrect items, so keep your Replace entries short enough to type easily.

Backing Up AutoCorrect Entries

Your Office 2010 AutoCorrect entries are stored in an `.acl` (AutoCorrect list) file. You do not have distinct lists for each Office 2010 application, nor for each Word template. Instead there is a separate list for each language you use with Office.

Your `.acl` files are stored in `C:\Users\[user]\AppData\Roaming\Microsoft\Office`. For English (U.S.) you would back up `MSO1033.acl`. For other languages, replace the number with the appropriate Windows locale code. Other common locale codes are 1034 for Spanish (Traditional Sort) and 1036 for French (France). Additional locale codes can be found at: `www.microsoft.com/resources/documentation/wss/2/all/adminguide/en-us/stsk09.mspx?mfr=true`

Sharing AutoCorrect Entries

Unfortunately, Word does not provide a built-in way to selectively copy AutoCorrect entries from one computer to another. You can, of course, copy your entire `.acl` list, but the entries in the replaced list will be lost.

A better alternative, if you have access to the macros that came with Word 2003, is to use the AutoCorrect Backup macro. It still Works with Word 2010, and the procedure is described here: `http://support.microsoft.com/kb/826147`

AutoCorrect versus Building Blocks

Are you getting the impression that whether you store document parts as AutoCorrect or Building Blocks (which include AutoText and Quick Parts) is largely up to you? If so, you're correct.

As a practical matter, however, most users tend to limit their AutoCorrect entries to corrections and shortcuts that they use in routine typing, reserving Building Blocks for larger concepts, such as tables, lists, graphics, and boilerplate document sections.

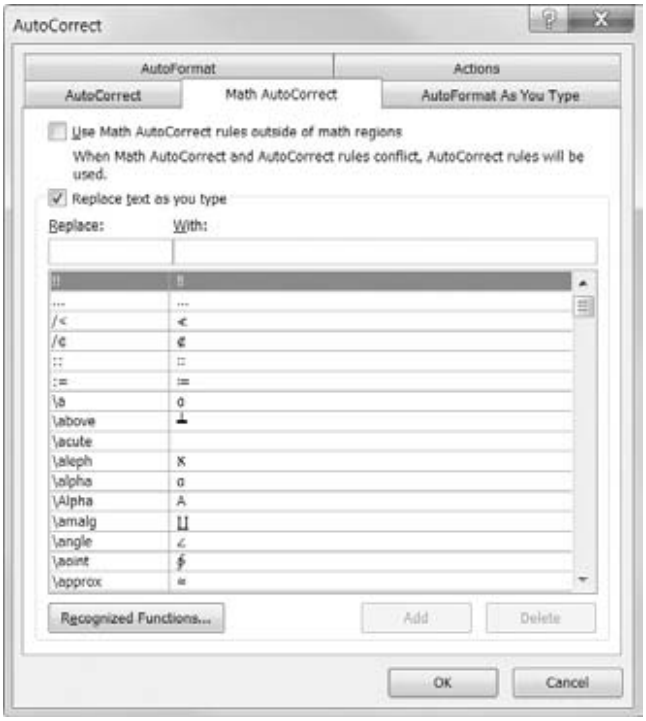
Math AutoCorrect

Math AutoCorrect works the same way that regular AutoCorrect does, but can be enabled or disabled independently. This feature provides what to some will be more intuitive access to math symbols than is available in Word through other means. It also interfaces directly with Word's equation editor.

To view Math AutoCorrect options choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options, and choose the Math AutoCorrect tab. Shown in Figure 14-5, Math AutoCorrect provides AutoCorrect access to over 200 commonly used math symbols (well, commonly used by some folks).

FIGURE 14-5

Math AutoCorrect can work in math regions or in regular text.



For example, suppose you want the symbol for theta. Any idea what the character code for theta is? In the Math AutoCorrect dialog box, enable both "Use Math AutoCorrect rules outside of math regions" and "Replace text as you type," and click OK. In the first option, "outside of math regions" means in the body of your document. Math regions are the structures you get when you choose Insert ➪ Equation ➪ Insert New Equation.

Now, having enabled Math AutoCorrect in the body of your document, type **\theta** and press the space bar. Instant theta.

Alternately, choose Insert ➪ Symbol ➪ More Symbols. In the Symbols tab, set Font to Symbol. Theta is in the fourth row, seventh column from the left. Double-click it, or select it and click Insert.

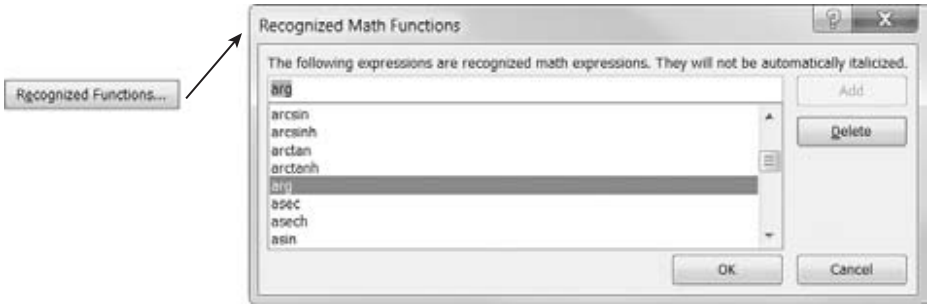
For most, typing \theta is a lot faster. There are over 200 Replace/With pairs in the Math AutoCorrect list, and learning them all might be a bit of a chore. However, if you already speak math, then many of them will occur to you quite readily. If the built-in names aren't intuitive to you, you can change them to something that is more intuitive.

Recognized Functions

In Word's equation editor, variables, such as *x, y, z, a, b,* and *c,* are italicized. However, functions, such as sin, cos, sec, tan, and other expressions that don't represent variables, are not italicized. When you're using Math AutoCorrect inside a math region (i.e., when you're using the equation editor), Word maintains a list of expressions and functions that are not italicized, shown in Figure 14-6.

FIGURE 14-6

You can add or delete expressions you don't want italicized when you're editing in math regions.



For example, suppose for some insane reason you suddenly want *max* to be italicized. To remove max from the "do not italicize" list, click Recognized Functions. Scroll down to and select max, and then click Delete.

You can also add items to the Recognized Functions list. Type the expression you want to add just above the top of the list and click Add. Once done, click OK or Close — your choice. They both do exactly the same thing. For additional magical capabilities of the Recognized Functions list, see Chapter 20.

Backing Up the Math AutoCorrect List

Like regular AutoCorrect entries, Math AutoCorrect entries are also stored in an `.acl` file in the `C:\Users\[user]\AppData\Roaming\Microsoft\Office` folder. If you modify the built-in list, you should back it up periodically. The Math AutoCorrect list file is named `MSO0127.acl`.

Summary

In this chapter you've seen how to use and create AutoCorrect Replace/With pairs to work more efficiently. You've also learned the limits of text-only AutoCorrect entries and how to get around those limits. This chapter has shown you the following:

- How to create AutoCorrect entries from spelling mistakes
- How to store formatted text and graphics as AutoCorrect entries
- How to back up your AutoCorrect entries to safeguard your investment of time, as well as for copying to another computer
- The difference between AutoCorrect and Building Blocks and how to decide which one to use
- How to enable and use Math AutoCorrect
- How to suppress automatic italicization of math functions
- How to back up Math AutoCorrect entries

CHAPTER 15

AutoFormat

A long, long time ago, in a bold effort to invite Word users to explore the wonderful world of poly-style formatting (using more styles than just Normal), Microsoft introduced something it called *AutoFormat*. It was a simple idea: Automatically convert some things that you type into their formatted counterparts, converting lone lines into headings, asterisks into bullets, numbers into formatted numbering, straight quotes into curly "smart quotes," and so on.

Over the years, AutoFormat has acquired additional capabilities. It has also attracted an assortment of supporters and detractors. Most users, however, fall squarely in the middle, liking some features while hating others. Many users are also confused by the similarly named but quite different features AutoFormat and AutoFormat As You Type. This chapter's mission is to show you how to turn on what you do like, turn off what you don't, and avoid spending time changing the wrong sets of defaults.

IN THIS CHAPTER

The difference between AutoFormat and AutoFormat As You Type

Finding the AutoFormat command

Running AutoFormat

Using AutoFormat As You Type

Changing AutoFormat As You Type settings

AutoFormat versus AutoFormat As You Type

AutoFormat comes in two flavors: AutoFormat and AutoFormat As You Type. The first, the AutoFormat command, you can apply to an existing document or text to automatically format elements in it.

The other version, AutoFormat As You Type, works like AutoCorrect. It automatically converts certain things that you type into various kinds of formatting. It shares some of the same converting elements as the AutoFormat command, but offers additional options.

Word users have long been confused by the presence of settings for both AutoFormat and AutoFormat As You Type in the tabbed Auto Manager dialog box (also called AutoCorrect), shown later in this chapter (see Figure 15-4).

To set the record straight here and now, AutoFormat As You Type settings affect what happens as you type. AutoFormat settings affect what happens when the AutoFormat command is applied to existing text.

The AutoFormat Command

When might you use AutoFormat? One application is to format a plain-text document that has never previously been formatted, and that uses various text conventions to simulate formatting. You might also use AutoFormat to "clean up" a Word document that has never been formatted properly. You might in addition consider using the AutoFormat command to try to reformat a document converted from another word processor, particularly one that doesn't use styles, or, in any case, a document that manifests no indication of styles having been used.

You can use AutoFormat on the current document in its entirety, or you can apply AutoFormat to selected text. Word searches through the selected text or through the document for formatting patterns and changes. By default, Word applies automatic formatting only to text styled as Normal, leaving alone styles applied by you. Therefore, for a true test of AutoFormat, the starting document should have just a single style, Normal, with all changes made via direct formatting.

If AutoFormat encounters a standout line with bold text that's larger than the surrounding text, Word formats it as Heading 1. If AutoFormat finds smaller text but with characteristics similar in other respects, it applies Heading 2. If AutoFormat trips over a bunch of one-line text entries all together, Word will assume that's a list. If that list has numbers or bullets, well ... you get the point. For a list of what Word does when you run the AutoFormat command, refer again to Figure 15-4.

Using AutoFormat

Go ahead. Take AutoFormat for a spin to see if it's a tool you'll be using a lot. Open a mono-styled document (one formatted only with Normal and direct formatting) and use the AutoFormat command. From the menu, choose ... oh, wait. There is no menu. Okay, on the Formatting toolbar choose ... oops, another dead end. Okay then, how about the Page Layout ribbon. Not there? If you used Word 2007, you probably already knew that.

Let's save you some effort. The AutoFormat command is neatly and conveniently located in Word 2010's command warehouse. Is Microsoft trying to subtly suggest we forget its existence?

In any case, if you plan to use the AutoFormat command, you'll need to drag it out and dust it off. Right-click the QAT (Quick Access Toolbar) and choose Customize Quick Access Toolbar. As shown in Figure 15-1, set "Choose commands from" to All Commands, and scroll down to AutoFormat. With AutoFormat selected, click Add. When you're done adding, click OK.

Note

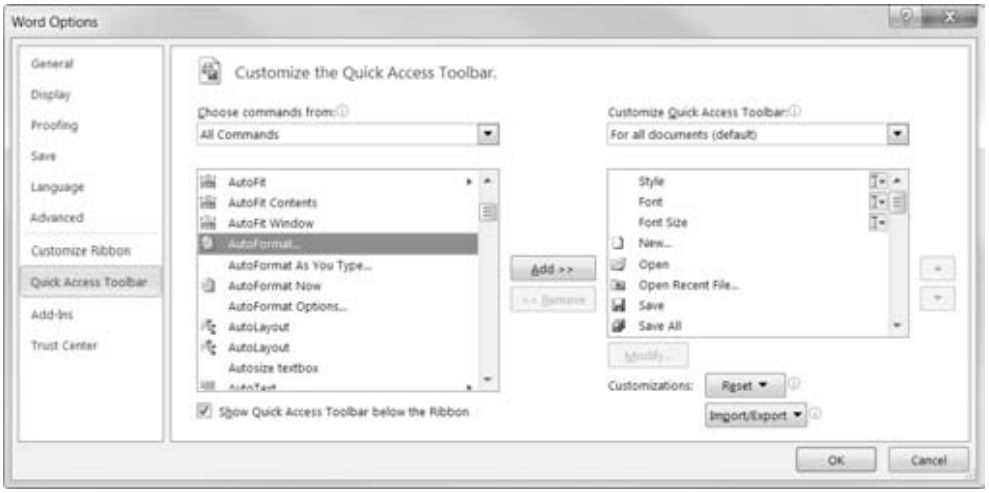
There are four AutoFormat commands from which to choose. To make this chapter easier to navigate, you might consider temporarily (at least) putting three of these onto the QAT. You can always remove them later (right-click the tool and choose Remove from Quick Access Toolbar). To save time, we'll assume for the purposes of this chapter that you've followed this advice.

The three I am suggesting you add to the QAT are:

- **AutoFormat: This command launches the AutoFormat process, giving you the dialog box shown in Figure 15-2 so you can better control that process.**
- **AutoFormat Now: This command runs AutoFormat immediately using the current defaults. It corresponds to the first option in Figure 15-2.**
- **AutoFormat As You Type: This command displays the AutoFormat As You Type dialog box. You'll read more about this a little later in this chapter. ■**

FIGURE 15-1

The AutoFormat command is not present in Word 2010's ribbon interface.



Click the AutoFormat tool you added to the QAT. Using the arrow under "Please select a document type to help improve the formatting process," you can choose one of three kinds of document: "General document," Letter, and Email, as shown in Figure 15-3. Each type uses different preconfigured sets of options optimized for the kind of document indicated.

The Options button, visible in Figure 15-2, provides access to the AutoFormat settings, shown in Figure 15-4. As indicated earlier, there are both AutoFormat and AutoFormat As You Type tabs. The AutoFormat tab affects only what happens when you run the AutoFormat command. The AutoFormat As You Type tab affects what happens, well, as you type.

FIGURE 15-2

The AutoFormat command enables you to AutoFormat in one fell swoop (AutoFormat Now) or to review each proposed change.

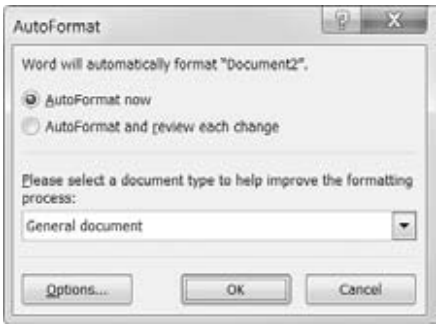
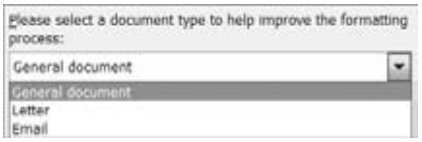


FIGURE 15-3

AutoFormat features preset options for three kinds of documents.



Running AutoFormat

To run AutoFormat open a document that's in need of formatting, or paste text from the Internet or some other source. If you want to format only part of the document, select only what you want AutoFormatted. Click the AutoFormat command on the QAT. If you're satisfied with the defaults shown in Figure 15-4 choose "AutoFormat and review each change," as shown in Figure 15-2, and click OK.

When you choose to review the changes, Word performs the AutoFormat in one fell swoop, and then presents you with the dialog box shown in Figure 15-5. Changes are applied with Track Changes turned on. You can "Accept or reject all changes," "Review and reject individual changes," or visit the Style Gallery.

It's pretty clear what happens if you choose Accept All or Reject All. If you choose Review Changes you're treated to a special version of the Review AutoFormat Changes dialog box, shown in Figure 15-6.

Proceed through the review as you like using the ⬅ Find and ➡ Find buttons. Choose Hide Marks (which switches to Show Marks) to toggle the revision marks off and on. If you see a change you don't want, click Reject. When you finish here, clicking Cancel will remove any changes you rejected, while everything else will be left intact. This takes you back to the dialog box shown in Figure 15-5.

FIGURE 15-4

Settings in the AutoFormat tab control what happens when you run the ''AutoFormat now'' command.



FIGURE 15-5

When you choose to review the changes, AutoFormat is applied in Track Changes mode.



If you choose Style Gallery, Word displays the dialog box shown in Figure 15-7. Using the styles applied during AutoFormat, Word now lets you preview the document using a variety of different document templates. Click different templates to see a preview of how they would affect the document.

Once you're finished in the Style Gallery, choose OK or Cancel to accept or reject the selected template's effects. Either choice puts you back at the AutoFormat dialog box shown in Figure 15-5, where you ultimately can accept or reject the AutoFormat results.

FIGURE 15-6

The ''Autoformat and review each change'' option performs the AutoFormat with Track Changes turned on.

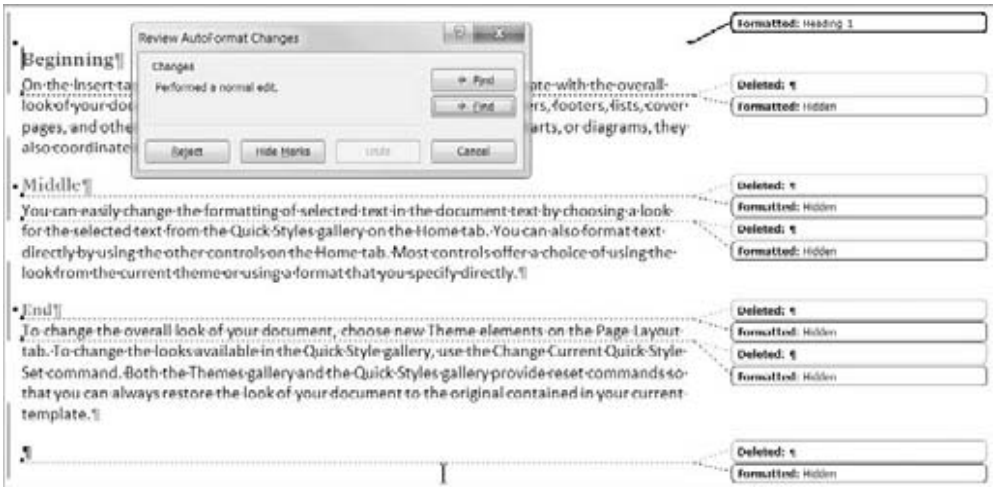
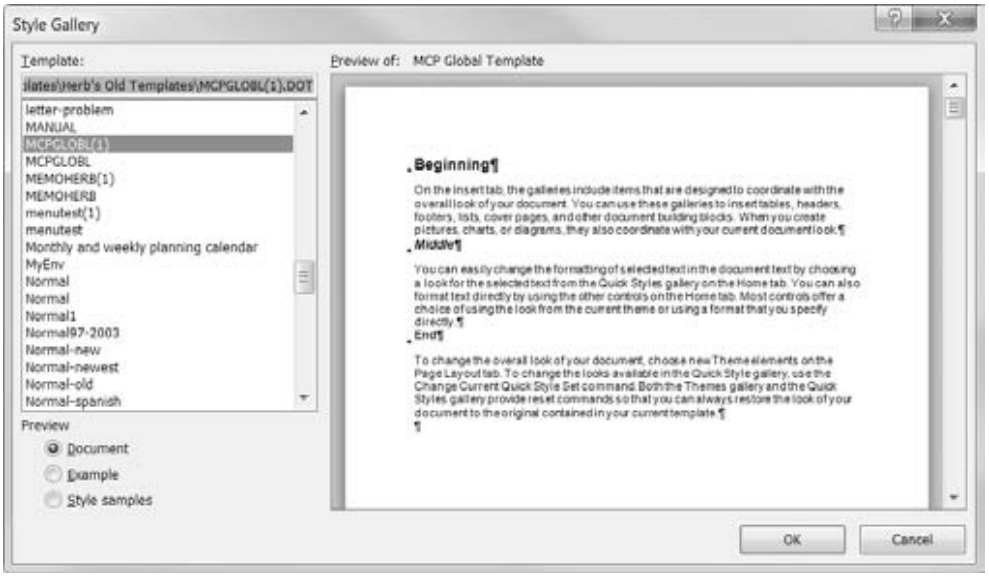


FIGURE 15-7

AutoFormat includes an optional tour of the Style Gallery so you can change the overall look of the AutoFormatted document.



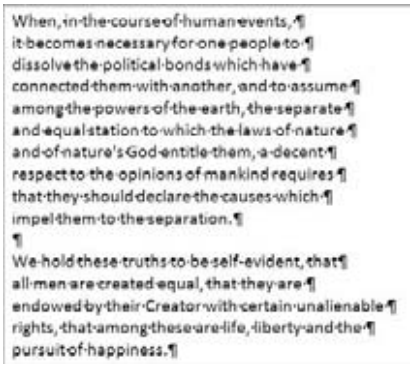
Are you impressed? Horrified? Utility, like beauty, is in the eye of the beholder. But let's consider at least one practical use for AutoFormat before we give up completely.

A Practical Use for the AutoFormat Command

Sometimes when you copy text from an e-mail or other source and paste it into Word, rather than flowing paragraph text you get a series of lines, each one terminated by a paragraph mark, such as is shown in Figure 15-8. One solution often used is to do a series of Find/Replace operations, changing all `^p^p` sets to something like `[para]`, changing the remaining `^p`s into spaces, and finally changing the `[para]` tokens back to `^p`.

FIGURE 15-8

Pasting text from the Internet sometimes yields a series of lines ending with paragraph breaks, rather than wrapped text.



This method works, but requires three steps. You can record a macro that does it for you. Indeed, many users have done that, including the author of the book you're reading.

But did you know that you could use AutoFormat to do it? Looking at the options in Figure 15-4, you'll see that there's nothing there that promises to convert hard returns into wrapped text. Indeed, there's no setting there that will do that.

Turn off all the options, and then run AutoFormat on text that needs to be converted to wrapped text. Presto!

You're probably wondering how this can happen if all the options are turned off. Well, all the options are turned off, but some things aren't optional. Converting hard paragraphs into wrapped text is one of them.

Tip

If the text you want to convert resides in a file, there's another option. In File ➪ Options ➪ Advanced ➪ General, enable the option to "Confirm file format conversion on open." When you open the file, use the drop-down list of file types to select either of the options that include "text with layout." When you open such a file, Word automatically interprets horizontal spacing as indentation and vertical spacing as paragraph separation, "restoring" wrap where it assumes paragraphs to have once existed. ■

AutoFormat As You Type

Or, should we call that AutoAnnoy As You Type? Word 2010 offers up to 22 AutoFormat As You Type options that it can perform to either make your word processing life easier or to annoy the heck out of you (or downstream editors and publishers). Annoyance, like utility and beauty, is in the eye of the beholder. (Chapter 6 briefly touched on AutoFormat As You Type, under "Automatic Annoyances.")

Out-of-the-box, Word 2010 comes storming into the ring ready to annoy or amaze you. All but three of the AutoFormat As You Type settings are enabled by default, as shown in Figure 15-9.

Some additional options appear if support for certain Eastern languages is installed, so don't be alarmed or feel deprived if your dialog box doesn't exactly match what you see here. If you're using those languages, let's go out on a limb and assume that you know what those options mean. The common ones present for a normal US installation are shown in Figure 15-9 and in Table 15-1.

FIGURE 15-9

Eleven of Word's 14 AutoFormat As You Type settings are enabled by default.



TABLE 15-1

AutoFormat As You Type Options

Replace As You Type	
"Straight quotes" with ‘‘smart quotes’’	Replaces " and ' with the appropriate directional quotes
Ordinals (1st) with superscript	Replaces 1st with 1st, 2nd with 2nd, etc.
Fractions (1/2) with fraction character (½)	Replaces 1/2 with ½, 1/4 with ¼, and 3/4 with ¾
Hyphens (--) with dash ([em])	Replaces two hyphens with an em dash (—) whether it’s truly appropriate or not
Bold and _italic_ with real formatting	Text enclosed in asterisks or underscores is automatically emboldened or italicized.
Internet and network paths with hyperlinks	Common Internet URLs and e-mail addresses (e.g., `www.wiley.com`, or `johnsmith@virginiacolony.org`) are replaced with the corresponding links. URLs have `http://` added, and e-mail addresses have `mailto:` added.
Apply As You Type	
Automatic bulleted lists	When you begin a line with an asterisk (*) followed by a space or tab, bullets formatting is applied. Oddly enough, if you use an actual bullet character, you must use a tab to force the AutoFormat.
Automatic numbered lists	When you begin a line with 1.<space>, 1.<tab> or 1<tab>, Word replaces the numbers and other punctuation with numbering formatting.
Border lines	Typing a series of dashes or underscores causes Word to replace them with border formatting.
Tables	If you type a pattern of +-+, +_+, or +=+, Word assumes that you’re trying to create a table. You get one column for each hyphen, underscore, or equals sign enclosed by plus signs. So +-+ yields one column, +-+-+ yields two, and so on. If you’ve ever seen old computer printouts from the 1970s, this makes perfect sense to you.
Built-in Heading styles	Word automatically applies heading styles (Heading 1, Heading 2, etc.) to text you type, based on the formatting. Apparently I don’t think like Word, because I’ve never been able to get this to work at all.

continued

TABLE 15-1 *(continued)*

Automatically As You Type	
Format beginning of list item like the one before it	When you're typing a list (formatted with one of Word's built-in list styles), Word observes how you format the beginning of the list, and then applies the same formatting to the beginning of each item that follows. For example, if each list item begins with a bold word and a period (or some other punctuation), Word will embolden the front end of each list item that follows. It doesn't work without punctuation, though.
Set left- and first-indent with tabs and backspaces	Pressing tab at the beginning of a line causes Word to indent that line. Each press indents further. Pressing backspace removes indents. See the section ''Indentation'' in Chapter 8 for a complete discussion of how this works.
Define styles based on your formatting	This IntelliSense feature is supposed to notice what you're doing and apply styles accordingly. Except for numbered and bulleted lists, I've never gotten this feature to work.

Tips and Techniques

Sometimes AutoFormat As You Type fills a void. Sometimes, to paraphrase an old left-handed compliment, they fill a much-needed void. While you're pondering to whom you might say "You fill a much-needed void!" there are a few tips and tricks that having AutoFormat As You Type turned on makes possible (or necessary), or that remind you that other gaps are much in need of filling.

Tricks with Quotes

What would you do if your editor suddenly told you that all your directional quotes needed to be removed? Or that all the straight quotes needed to be curved?

Either way, there's an easy solution. In the AutoFormat As You Type options, change the "Straight quotes" with "smart quotes" option to reflect what you actually want in the document. If you want straight quotes, disable the option. If you want curly quotes, enable it.

Press Ctrl+H to summon the Replace dialog box (or click Replace in the Home ribbon). Make sure that no formatting is applied to the Find What and Replace With boxes, and that Use Wildcards and other options are all unchecked.

In both the Find What and Replace With boxes, type a single plain straight double quote ("). Note that when you type it it won't look curly, regardless of your settings. Click Replace All. That's it!

Well, almost. You now need to do the same thing for the single-quote (') character. Put a single straight quote into both the Find What and Replace With boxes and again click Replace All.

What About the Other Fractions?

You might have noticed that the only fractions that are automatically replaced are 1/2, 1/4, and 3/4. What about the others, such as 1/3, 2/3, 1/5, and 1/8?

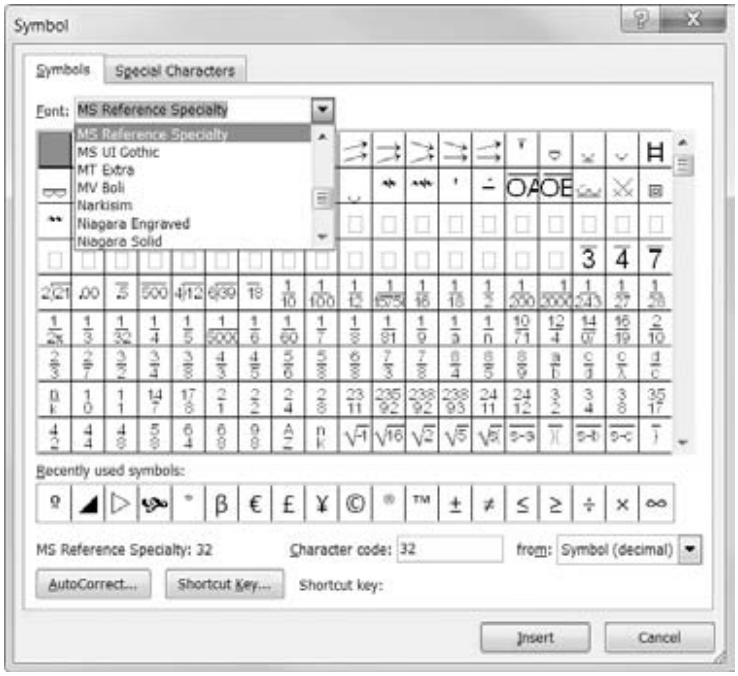
Well, you can have those too, but you'll have to DIY (do it yourself). Plus, to make it easy, it helps if you have the right fonts installed on your computer. To this end, a lot will depend on how long you've had your computer and how much stuff you've installed on it. There are two methods for assigning fractions.

Assigning Fractions Using Symbols and AutoCorrect

The first method is to paw your way through your symbols to see if any installed fonts have the fractions you need. If they do, simply assign an AutoCorrect entry to create the conversion you seek. To begin pawing, choose Insert ➪ Symbol, and change the font as shown in Figure 15-10. On the computer being used to write this book, two fonts are potentially useful: WP TypographicSymbols and MS Reference Specialty.

FIGURE 15-10

If you have fonts that contain fractions, you can assign them to AutoCorrect entries.



MS Reference Specialty was installed as part of a program I've now forgotten about. As you can see, however, this font has a number of fractions in it, but there is a tiny problem. The ones available in the default Word have a diagonal dividing line. These have a horizontal line, so for

consistency you probably would want to disable the AutoFormat As You Type feature and create new AutoCorrect entries that use the horizontal line.

To create an entry for $\frac{1}{2}$, click to select the $\frac{1}{2}$ symbol in the font map, and then click AutoCorrect in the lower left-hand corner. In the Replace box, type **1/2**. Note that the With box is listed as Formatted text. That's because the resulting character won't work unless the correct font is applied.

You might be worried that if you ever change the font of an entire document, without regard to styles and the presence of your new fraction friends, they will melt into the landscape. But Word usually notes that such characters are symbols, and they are protected in the application of different fonts. You will, naturally, want to test for robustness any AutoCorrect replacements you create. One way to do that is to insert the character, select it, and then click the Clear Formatting button in the Font section of the Home ribbon. If it survives, it likely will work in Word documents you create. Note that characters created this way naturally scale up and down when you change font sizes, which is another advantage of this method.

Assigning Fractions Using Equations and AutoCorrect

The other method is a bit more complicated, and involves using either an EQ field or the equation editor to create the fraction(s) you seek. Then, assign an AutoCorrect entry to convert what you type into the necessary field or equation.

Using the EQ field is just about as tedious an exercise as anything you'll ever experience. The field exists only for reasons of backward compatibility. It is passé, anachronistic, and not covered in this book, except in passing in Chapter 21.

Note

In the steps that follow, when you choose Insert ➪ Equation, your insertion point should be at a normal place in the text, i.e., where you might normally type 1/3. If the insertion point is on a line all by itself, the resulting "equation" will be centered alone on a line, which presumably isn't satisfactory. ■

Follow these steps to assign fractions using equations:

1. Click Insert ➪ Equation. Word inserts a math region, as shown in Figure 15-11, inviting you to type the equation. The equation editor will never know that you're not typing a complete equation!
2. Type **1/3** (for example) into the space provided.
3. Press the spacebar to finish the conversion.

FIGURE 15-11

Use a math region to build your own fractions.



Now you have your completed fraction, but you're not quite done yet. Select the completed fraction and summon the AutoCorrect dialog box (File ➪ Word Options ➪ Proofing ➪ AutoCorrect Options). Note that again the With box shows the fraction and indicates that it is formatted. Type **1/3** into the Replace box, click Add ➪ OK, and you're done.

Summary

AutoFormat and AutoFormat As You Type can be a force for good or a force for evil. Only you know what's annoying to you and what works for you. After reading this chapter you should be able to do the following:

- Turn off any AutoFormat As You Type annoyance
- Selectively use the AutoFormat command to convert pasted text from a series of one-line paragraphs into word-wrapped text
- Change curly quotes to straight quotes, and vice versa

CHAPTER 16

Action Options (What Happened to Smart Tags?)

Word 2007 had many users scratching their heads asking "What are those purple dots?" Word 2010 users who found them useful might be asking "What happened to Smart Tags?" The purple dots are gone, replaced by much less flamboyant Action options. Action options are special kinds of links that are associated with names, places, addresses, telephone numbers, and financial symbols, to name a few. When enabled, an Additional Actions choice appears when you right-click an associated item, as shown in Figure 16-1. Otherwise, you might never know they are there.

Smart tags made their world premiere debut in beta versions of Office XP. The idea was that developers, using XML (eXtensible Markup Language), could add action links to certain keywords, making those keywords especially useful (sometimes).

For whatever reason, Smart Tags have been abandoned in Office 2010, having been replaced by the Additional Actions menu item shown in Figure 16-1.

The actions provided are a lot less extensive and useful than they were in Word 2007. At most they might offer to dial a telephone number, add a number to your default address book, or look up a financial symbol, as shown in Figure 16-2.

In any event, now that you know what happened to Smart Tags and know about the feature that replaced them, you're in a better position to determine whether to let Actions occupy memory as an add-in, or to simply dump them and forget about them.

IN THIS CHAPTER

What happened to Smart Tags?

Action add-ons

Action settings

Removing and restoring Actions

FIGURE 16-1

Additional Actions options are provided for a limited selection of items Office 2010 can recognize.



FIGURE 16-2

The ability to quickly look up a stock symbol might sometimes come in handy.

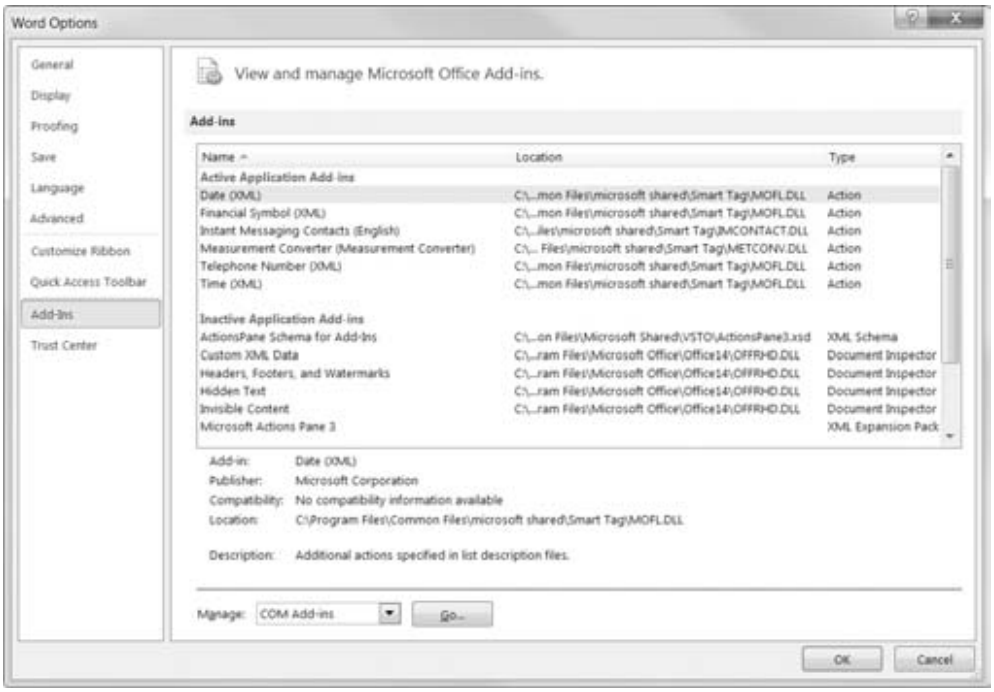


Understanding Additional Actions

The Actions are not built into Word. Instead, they are enabled by a set of add-ins that come with Word. To visit them where they live, choose File ➪ Options ➪ Add-Ins. The Add-Ins section of Word Options shows you active and inactive add-ins. We'll look at add-ins more fully in Chapter 47. In Figure 16-3, six Action type add-ins are active. Note that even though Smart Tags are gone, the nomenclature is not. For now, at least, the add-ins for Additional Actions are stored in a Smart Tag folder.

FIGURE 16-3

Actions are controlled by a number of different add-ins.



Action Settings

In order for the Additional Options to appear in the context menu, they must be enabled. This is done in the Actions tab in the AutoCorrect dialog box, shown in Figure 16-4. To access this dialog box, choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options ➪ Actions tab. You can also get there from the dialog box shown in Figure 16-3 by setting Manage to Actions, and clicking Go.

More Actions and Properties

The "More actions" button, shown in Figure 16-4, takes you to a website where the action is. At this writing, there's a handful of third-party products that, in theory, will lead to additional entries in the Available actions: list.

FIGURE 16-4

Word can display nine different kinds of actions.



Summary

In this chapter you've learned why those purple underlines are MIA in Word 2010. Do you feel abandoned, or unfettered? Either way, they're gone. You now know what the Actions tab is for, and how you can save a little bit of program memory by turning this essentially useless feature off. Or, in the unlikely event that you find this feature useful, you now know how to turn it on all the way. Or, if Microsoft resurrects the feature into something useful, you'll know where to look for the basic controls that do the following:

- Make Additional Actions options appear in the context menu
- Selectively remove Actions you neither want nor need, while keeping the ones you want

Part IV

More than Mere Words

Man does not live by words alone. Neither does woman, for that matter. Part IV explores the frontiers beyond mere words, boldly venturing into the world of tables, pictures, headers, footers, objects, fields, and other document components that take advantage of Word's many capabilities. When words fail you, try charts, equations, WordArt, and symbols.

Chapter 17 explores the intricacies and nuances of tables. Chapter 18 deals with pictures and Word 2010's SmartArt feature. Chapter 19 takes you beyond the normal parts of the page, looking at headers and footers and the variety of other objects that can reside there. Chapter 20 shows you how to insert symbols and equations, the latter using Word's equation editor. Chapters 21 and 22 explore the many uses of Word fields and the creation of flexible text using WordArt, respectively. Chapter 23 draws from the old and new, showing how to insert charts using Word's legacy chart application as well as Office 2010's Excel-based charts. Finally, Chapter 24 shows how to work with objects and files.

IN THIS PART

Chapter 17
Tables

Chapter 18
Pictures and SmartArt

Chapter 19
Headers and Footers

Chapter 20
Symbols and Equations

Chapter 21
Field Guide

Chapter 22
WordArt

Chapter 23
Charts

Chapter 24
Inserting Objects and Files

CHAPTER 17

Tables

Tables are one of Word's most powerful and useful tools. They're extremely flexible and easy to create and manipulate, both directly and via the ribbon. Thanks to a gaggle of galleries, it's easy to create professional-looking tables quickly and with minimal effort. Live preview comes to life when it comes to working with tables. So, pull up a chair!

IN THIS CHAPTER

The quickest way to create a table

Creating tables from scratch

Using table styles

Handling tables, rows, columns, and cells

Table layout and design

Quick Start

The quickest way to create a table in Word is to use one that already exists. It might not be exactly what you want, but it often will be closer to what you want than if you create one from scratch. It helps if you can see a picture, of course, and Word 2010 includes many images of tables. From the Insert ribbon choose Table ➪ Quick Tables for a view similar to what is shown in Figure 17-1.

Stroll through the gallery to see if there's something you like — something that compares favorably with the table in your mind's eye. If there is, click on it. If it has too many rows, you can delete the ones you don't need. If it has too few columns, you can add a few more. If the proportions and other attributes aren't quite right, you can use Word's table tools to make them right. The point is that you hit the ground running.

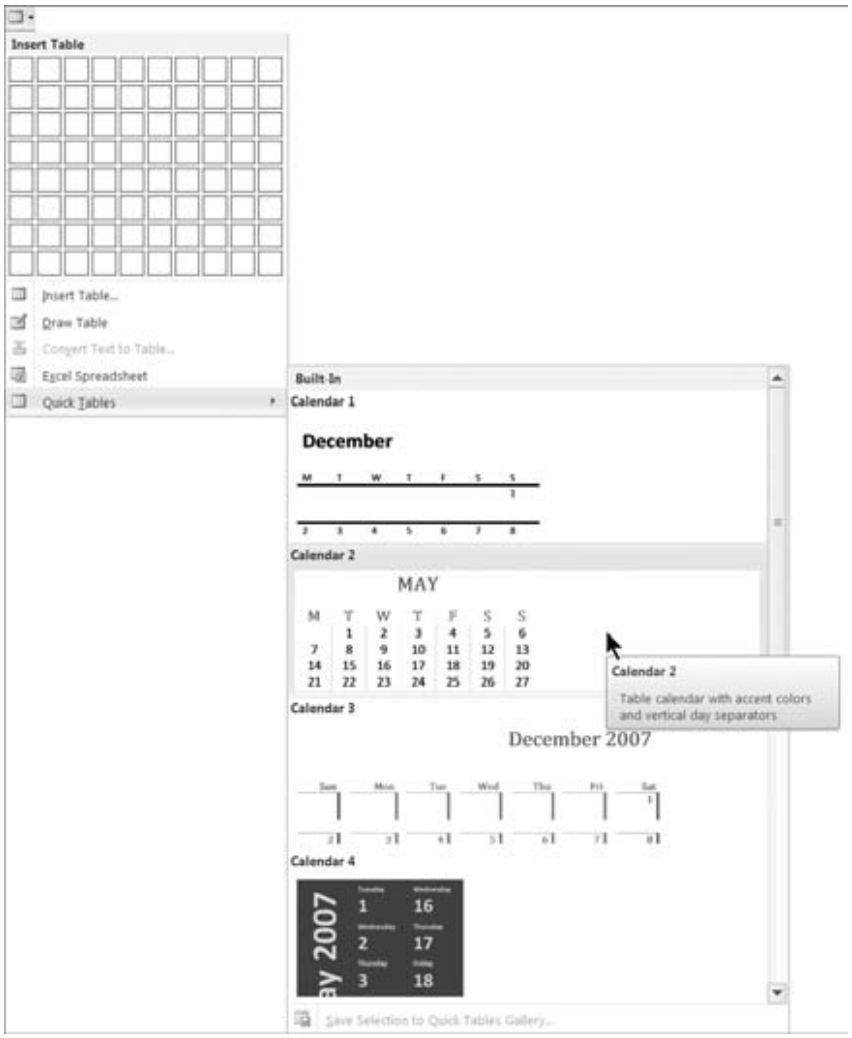
Table Basics

One way to think about a table is as a container for information. The container consists of horizontal rows and vertical columns. If someone speaks of a five-by-four (5 × 4) table, by convention and agreement this refers to a table that's five columns high and four rows wide.

If the terminology is foreign to you, think of rows as you would rows of seats in a theater. Think of columns as vertical columns on a building. Rows go across, and columns go up and down.

FIGURE 17-1

The Quick Tables Gallery offers a number of preformatted tables.



Inserting Tables from Scratch

There are three basic methods for creating a table from scratch. One is to use the Table tool to select the numbers of rows and columns you want. In the Insert ribbon click Table. Release the mouse button and then draw the mouse down through the table grid. As you move the mouse, the selected table dimensions change, and Word shows a live preview in the document window, as shown in Figure 17-2. Click the mouse when you see what you want.

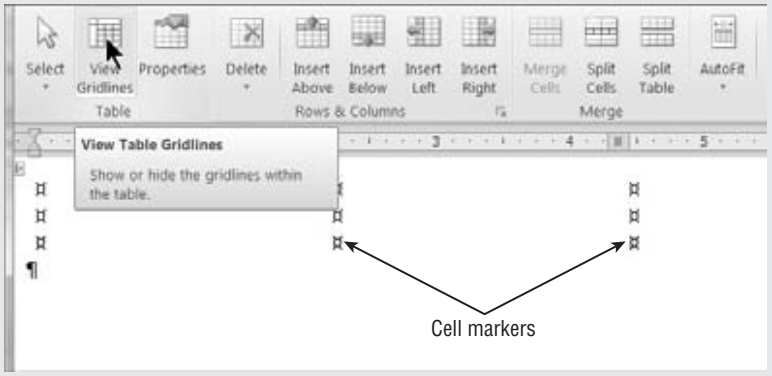
A second method for creating a table from scratch is by using the Insert Table dialog box. To get its attention, choose Table ➪ Insert Table in the Insert ribbon. As shown in Figure 17-3, you choose the number of columns and rows, select an AutoFit behavior, and click OK. If you'd like Word to remember to default to the dimensions you choose, then click the "Remember dimensions for new tables" option.

Cell Markers and Gridlines

When nonprinting formatting marks are displayed (Ctrl+Shift+8), cell markers display in each cell, showing where the cells are, as indicated in Figure 17-2. You might wonder why cell markers are needed if the table borders show the location of cells. That's because not every table has borders. If a borderless table's gridlines aren't displayed, you might not even know a table is there! Toggling the cell markers might provide just the clue you need. Cell markers, incidentally, display whenever paragraph marks do.

When a table has no borders, it's a good idea to display table gridlines. These are nonprinting marks that show the cell's dimensions. To display gridlines, click the Show Gridlines tool at the left end of the Table Tools Layout ribbon, as shown in the following figure.

Without the cell markers you wouldn't know that this was a table.



The third method for inserting a table from scratch is to draw it using the Draw Table tool. To begin, choose Insert ➪ Table ➪ Draw Table. Drag a rectangle to inscribe the outer boundary of your table shell, and then use the Draw Table tool (or pen) to carve out the desired cells. Use the tools in the Table Tools ➪ Design ribbon's Draw Borders group to set line style, weight, and color for the table borders. Use the eraser tool to remove unwanted table parts. See "Borders and Table Drawing" and "The Table Eraser" later in this chapter for additional information.

FIGURE 17-2

When a 5 × 4 table is selected in the Table tool grid, a 5 × 4 live preview appears in the document window.

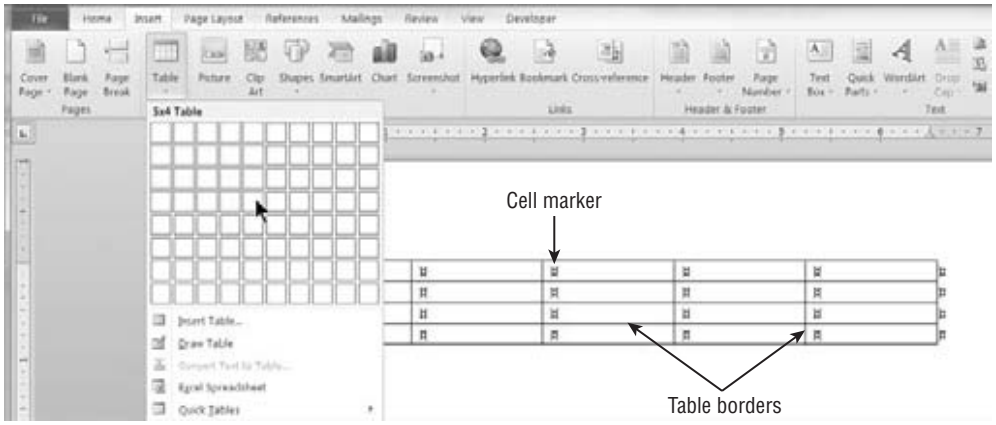


FIGURE 17-3

If your hands aren't steady, use the old-fashioned dialog box to choose the number of columns and rows using spin controls.

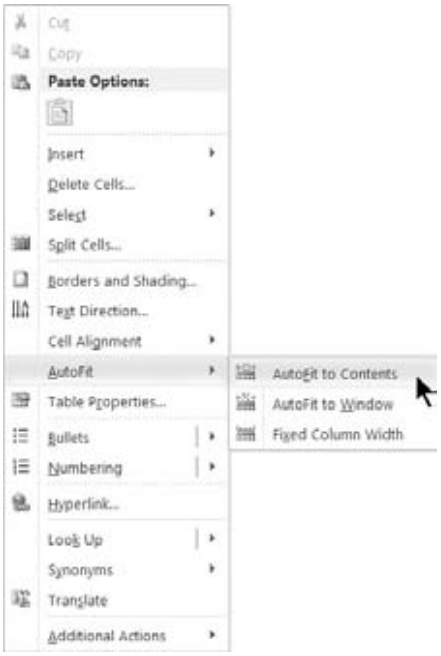


AutoFit Behavior

Notice the AutoFit behavior options shown in Figure 17-3. These same AutoFit options are also available from the right-click menu, as shown in Figure 17-4. Keep this in mind if you need to change the formatting once a table is fully populated.

FIGURE 17-4

When the insertion point is inside a table, table-related options are displayed on the right-click menu.



The Fixed Column Width option is straightforward enough. When you choose this option, the column widths remain fixed unless you explicitly change them by dragging or by using some other method. Note that *fixed* is not the same as *equal*. The column widths might be equal also, but that's a different concept.

The middle option — AutoFit to Contents — is a formatting attribute that causes a table to automatically resize as you add or remove material. It's not a temporary setting, so don't freak out when the table acts as if it were made out of elastic when you add or remove text in existing cells.

The third option — AutoFit to Window — is misnamed. It should be "AutoFit to left and right margins." This option means that the table will remain as wide as the document text itself,

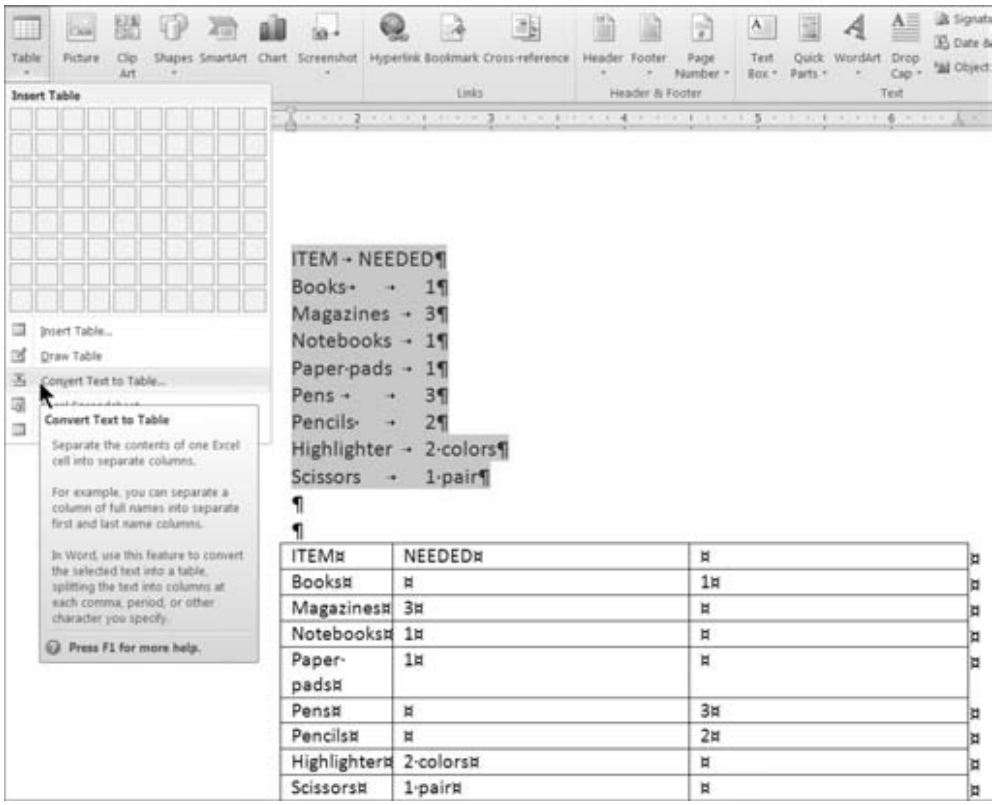
regardless of how much text you stuff into the cells. If you add text disproportionately to any given column, that column will automatically resize, making the other columns correspondingly narrower. But the table itself will maintain the width of the document text.

Inserting Tables Based on Existing Data

As suggested elsewhere in this book, there is a correspondence between the word *tab* and the word *table*. While the proportion of the word processing population that was raised on typewriters is rapidly dwindling, many of us still survive in the wild. Those who took typing classes learned how to fashion tables using the tab stops and the tab key. Tab stops are metal hardware on a typewriter that literally stop the carriage when you press the tab key.

FIGURE 17-5

Word easily converts a tabbed ''table'' into an actual Word table.



Microsoft knows that *tab* and *table* both have the same root. As a result, Word can readily convert your tab-delineated tables into real tables. The easiest way begins with selecting the "table" (although it might look like a table, Word doesn't agree). In the Insert ribbon, click

Table ➪ Insert Table. Word instantly determines how many rows and columns there are and encloses your data in a table. As shown in Figure 17-5, the results are basic, but functional. For example, though you often end up with the expected number of rows and columns, one or both might be too wide.

You can fix the width problem easily. Right-click anywhere in the table and choose AutoFit ➪ AutoFit to Contents (refer to Figure 17-4).

Note

There are other methods for converting text to tables, but they all take more effort. For example, you can create a table *shell* (an empty table) that fits the dimensions of the data you have, select it, and then drag your tabbed data into it. ■

Convert Text to Table

Alternatively, you can use the Convert Text to Table dialog box as an intermediary. Select the data to be converted and choose Table ➪ Convert Text to Table. This displays the Convert Text to Table dialog box, shown in Figure 17-6.

FIGURE 17-6

The Convert Text to Table dialog box guesses how many rows and columns to create.



This method doesn't produce instant results, but it does let you set the AutoFit behavior ahead of time, as well as choose a different column delimiter if the one Word guesses (usually tabs) is incorrect.

It's also a useful diagnostic tool when the quick method illustrated earlier yields unexpected results, such as more or fewer columns than you expected. When you get the wrong table dimensions press Ctrl+Z, investigate the data, make any corrections, and try again.

You can get the wrong number of columns if there are too many tabs (sometimes obscured as a result of formatting issues) or if some rows use spaces instead of tabs to achieve the table

"look." Figure 17-5 demonstrates the utility of displaying nonprinting formatting characters, such as tabs. In this case the user relied upon built-in tab stops rather than setting a custom tab in the tabbed table. As a result, alignment required two tabs for some of the shorter items (Books, Pens, and Pencils), and only one tab for each of the others. The result confuses Word, which assumes there are three columns, rather than two. When this happens dismiss the dialog box, find and remove the extra tabs, and try again. Don't worry about setting a properly aligned tab, because you're converting the tabbed data into a table anyway; the table will handle the alignment for you.

Converting Tables to Text

What goes around comes around. Sometimes it's necessary or useful to convert an existing table to text. You might want to do this if the data needs to be provided to someone else in a different form. Some statistical programs will accept CSV (comma-separated value) data, but not Word tables. Or you might simply find it easier to manipulate the data in text form, and then transform it back into a table. Whatever the reason, it's easy.

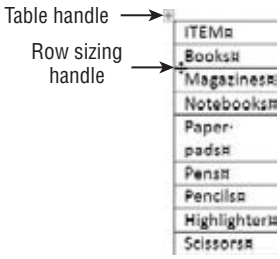
First, save your document (because it's easy to make mistakes too). Next, select the table you want to convert. This activates the Table Tools ribbon. Click Layout, and on the right end choose Convert to Text. In the Convert Table to Text dialog box choose the desired horizontal delimiter and then click OK. Note that if the table contains nested tables, then the Convert Nested Tables option will be available.

Handling Tables

Word tables feature several kinds of handles and mouse pointers that enable you to manipulate and select cells, rows, columns, and entire tables. The table handle, shown in Figure 17-7, is displayed only when part of the table is selected, and only when all formatting marks are displayed (File ➪ Options ➪ Display). Row and column sizing handles, on the other hand, are not affected by the display setting.

FIGURE 17-7

Handles enable you to resize rows and columns by dragging, as well as to select and move whole tables.



Use the row sizing handle to drag the row to make it larger or smaller. Press the alt key while dragging to display the measurements on the vertical ruler (even if the vertical ruler currently is not displayed).

You can resize columns in a similar way by dragging the column sizing handles (they look like the row handles flipped 90 degrees). Again, pressing the alt key while dragging displays the measurements, this time on the horizontal ruler, enabling you to drag with a little more precision. You can modify the results by pressing the control or shift keys while dragging. Experiment to see which method yields the desired results. Remember: Ctrl+Z is your friend.

The entire table can be resized proportionally with the resize table handle. Hover the mouse pointer over it until you see a diagonal arrow and drag to expand or shrink the table.

Selecting Tables, Rows, and Columns

Click the table handle to select the entire table. You can also select an entire table by right-clicking anywhere in it and choosing Select Table. If you're ribbon-oriented you can always select the table by clicking anywhere in it to reveal the Table Tools ribbons, shown in Figure 17-8, and then clicking Select ➪ Select Table in the Layout sub-ribbon.

FIGURE 17-8

Use the Table Tools ➪ Layout sub-ribbon to access a number of table selection and manipulation tools.



There is also a keyboard method for selecting tables, but it's a nuisance to remember and to use. With the insertion point anywhere in the table, and number lock engaged, press Alt+Shift+5 on the number pad. If number lock isn't engaged, press Shift+5 on the number pad instead. Unless it's Thursday, of course, in which case . . .

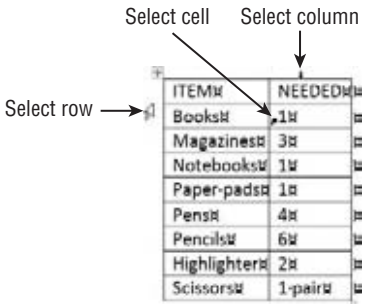
To select a cell you can use the method illustrated in Figure 17-8. If you're using the keyboard, selecting the cell marker selects the cell. Hold down the shift key and use the arrow keys to expand the selection to other cells. If you're using the direct mouse method, move the mouse pointer so that it is the small diagonal black arrow indicated in Figure 17-9. You can drag to expand the selection to include additional cells. Or hold the control key and use the select cell pointer to select additional discrete cells.

To select a row without using the ribbon, move the mouse pointer so that it assumes the Select Row shape, and click. Drag to expand the selection to include contiguous rows, or Ctrl+Click using the Select Row pointer to select additional noncontiguous rows.

To select a column without using the ribbon, move the mouse pointer so that it takes on the Select Column shape, and click. Again, drag to expand the selection to include additional contiguous columns, or Shift+Click using the Select Column pointer to select additional discrete/noncontiguous columns.

FIGURE 17-9

Word's mouse pointer changes shape to indicate what action a click will perform.



Copying Table Matter

When copying all or part of a table from one table to another, you need to consider the dimensions of the source and the target. Sometimes when you paste into the new table the whole table is pasted into a single cell! That's hardly ever what you want!

As a general rule, when you're pasting table matter the receiving dimensions should match the sending dimensions. If you're trying to paste a 4 × 5 set of cells into a table whose dimensions are 6 × 8, then copy the 4 × 5 source to the clipboard, then select the desired 4 × 5 location in the receiving table, and then paste. Pasting without first selecting sometimes works, but sometimes it doesn't. The situation can get even weirder when you're pasting between Word and Excel, so have that Ctrl+Z (Undo) command standing by.

To control what happens with respect to formatting, see the File ➪ Options ➪ Advanced ➪ Cut, Copy, and Paste section. Use the top four pasting options to specify what happens when you paste under a variety of circumstances. If necessary, temporarily enable the desired behavior, perform the paste, and then go back to reset the defaults.

Moving and Copying Columns

To move one or more adjacent columns, select them and then drag to the desired column. Release the mouse button anywhere in the destination column. The selected column(s) will move to the position of the destination column, which will scoot to the right. To move one or more selected columns to the right of the rightmost column, drop the selection at what appears to be outside the right edge of the table. As shown in Figure 17-9, there are cell markers to the right of the table's right boundary. When moving columns to the right side of the table, drop them on those exterior markers.

To copy one or more columns, hold the control key as you drop. The selection will be inserted at the drop point, using the same location rules that apply when you're moving columns.

Moving and Copying Rows

Rows can be moved and copied in the same way as columns, except with respect to the last row. The last row does not have exterior cell markers. If you drop a selection of one or more rows onto the last row of a table, the selection will be placed above the last row. If you drop it after the last row, the selection will be appended to the table, but the formatting will often change.

Instead, when you want to move rows after the last current row, drop them on the last row. Then put the insertion point anywhere in the last row and press Ctrl+Shift+Up Arrow to move the stubborn last row up to where you want it.

Tip

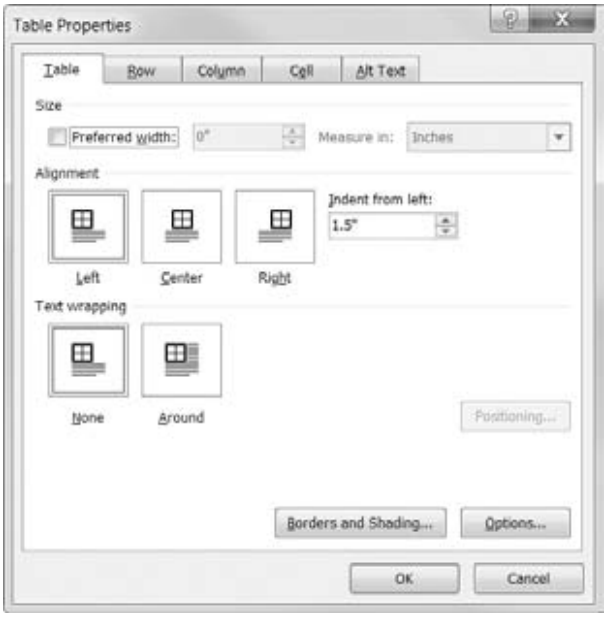
Anytime you want to move table rows around, Ctrl+Alt+Up and Ctrl+Alt+Down can be used to push the current row up or down in the table. If you're moving a single row you don't need to select anything. If you're moving multiple contiguous rows, select them first. ■

Table Properties

If you prefer to manipulate tables nongraphically, click Properties in the Table Tools Layout ribbon, or right-click a table and choose Table Properties to display the dialog box shown in Figure 17-10. Use the Table tab to control overall layout and behavior; use the other tabs to control row, column, and cell characteristics.

FIGURE 17-10

Use Table Properties to control overall alignment, indentation, and positioning of tables.



Preferred Width

"Preferred width" sets a target width for the table. The preferred width can't be absolute, however, because tables contain text and data, and are further constrained by paper and margin settings. Note that the preferred width is overridden by AutoFit settings.

Alignment

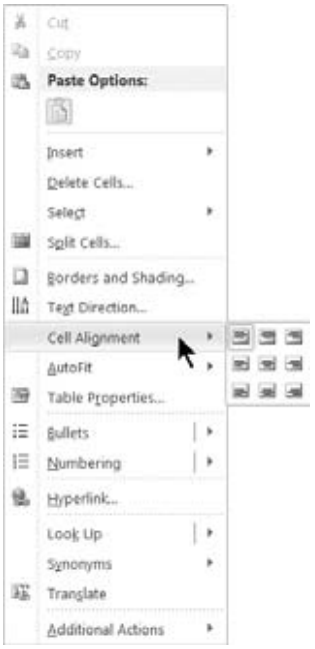
Table alignment affects the entire table with respect to the current left and right margins. If the table extends from the left margin to the right margin, which is the default for tables inserted in Word, then the alignment controls seemingly will have no effect. This makes it easy not to notice if they're changed. If you later narrow the table, its placement on the page might suddenly seem askew. That's the time to visit the Table Properties dialog box to see what's going on.

Table alignment is a sore spot for some users because table alignment and text alignment within cells are different things. Whereas table alignment can be set via the alignment tools in the ribbon, if the entire table is not selected, then the Home ribbon's paragraph alignment tools affect only the selected portion of the table.

The Cell Alignment option, shown in Figure 17-11, affects only selected cells. The alignment tools in the Table Tools ➪ Layout ribbon also affect only selected cells.

FIGURE 17-11

Cell Alignment affects only the text inside cells, even if the entire table is selected.



The bottom line is that if you're having trouble centering your table, center it using the Alignment control in the Table tab of the Table Properties dialog box. You can't go wrong.

Indent from Left

This setting controls how far the table is from the left margin. There is no ribbon control for this setting, and it cannot be set with the ruler line.

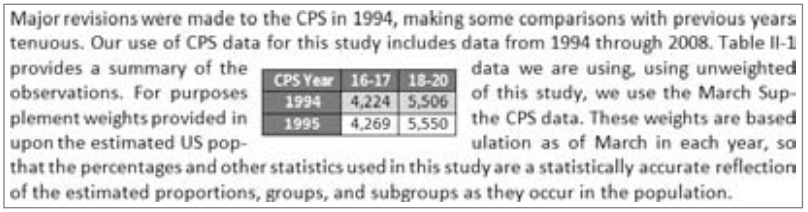
Note that "Indent from left" is available only when "Text wrapping" is set to None (see Figure 17-10) and Alignment is set to Left. When Around text wrapping is enabled, use Positioning to set the distance from the left, as shown in the section that follows.

Text Wrapping

Tables can be inserted in line with other text, or they can be moved/dragged so that text outside the table wraps around them, as shown in Figure 17-12. You can achieve wrapping by selecting the appropriate option in the Table Properties dialog box, or you can force it by dragging a table to the desired location using its handle. This automatically changes the text wrapping setting from None to Around.

FIGURE 17-12

Tables can be positioned for text wrapping, like graphics.


Major revisions were made to the CPS in 1994, making some comparisons with previous years tenuous. Our use of CPS data for this study includes data from 1994 through 2008. Table II-1 provides a summary of the

CPS Year	16-17	18-20
1994	4,224	5,506
1995	4,269	5,550

data we are using, using unweighted observations. For purposes of this study, we use the March Supplement weights provided in the CPS data. These weights are based upon the estimated US population as of March in each year, so that the percentages and other statistics used in this study are a statistically accurate reflection of the estimated proportions, groups, and subgroups as they occur in the population.

Positioning

Table positioning is used much like the positioning settings for graphics. Most of the settings here need no further explanation.

The Move with Text option controls whether the table's vertical position is governed by the paragraph to which it is anchored. If Move with Text is enabled, the vertical position can be relative to only paragraph. Use this setting if the paragraph's content and the table's content are intertwined so that the table would not make sense except in that paragraph. This often is the setting you want for research reports.

Turn off Move with Text if the location of the table is not logically tied to a particular paragraph. This setting might be more in keeping with the design of a brochure or a newsletter in which the table's contents are relevant to the entire document and should appear in a particular location for aesthetic reasons.

Table Layout and Design

Word 2010's Table Tools ribbon provides you with most of what you need to create tables that are both aesthetically appealing and functional. Naturally Word can't do all of the work. It's up to you to decide on presentation. When you get stuck for ideas, however, sometimes the ribbon provides just the touch of inspiration, or just the right suggestion or hint to speed you along your way.

Word's Table Tools ribbon tabs are Design and Layout. In many ways, although Design comes first in the ribbon, Layout logically comes first. Layout determines whether or not your presentation is logical, whether it is meaningful to the reader, and ultimately whether it helps prove whatever point you're trying to make. After all that, design is icing on the cake.

So far we've looked at a number of basic tools that help you achieve the right structure for your tables. In this section we're going to look at how to mold tables into shape and then polish them for presentation.

Note

Many of the ribbon techniques described in this section are also available in the right-click context menu. If you prefer the context menu to the ribbon, press Ctrl+F1 to dismiss the ribbon and go for it! ■

Modifying Table Layout

Once you have your basic table, what do you do with it? We all know that situations, ideas, and data change. Let's look at how to cope with change.

Note that all references to the Layout ribbon in this section actually refer to the Table Tools Layout ribbon. We can save ink and trees by saying that up front rather than each and every time the need arises. Note that none of the layout tools provide live preview. Live preview must wait for the Design ribbon discussion.

Deleting Tables and Table Parts

Sometimes you need to trim your tables by deleting rows or columns. Sometimes you have to delete the entire table. Sometimes this simple act can prove more daunting and challenging than you expect. If you select a table and tap the delete key, the data inside the table is deleted, but the table shell itself is still there! "Good trick! Now make it go away!" you exclaim. The same thing sometimes happens when you try to delete a cell, a row, or a column.

Tip

When the delete key doesn't do what you want, try the backspace key instead. ■

Rather than say this a half dozen times, let's just say it once. If you want to remove the contents of a cell, row, column, or table, select what you want to remove and tap the delete key. In the sections that follow we'll be looking at table structure, not contents.

Deleting Tables

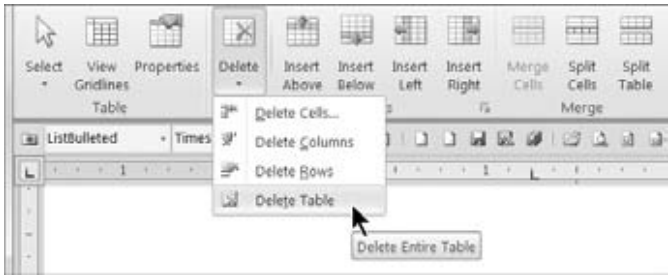
As you've seen, you can't just select a table and tap the delete key. That would be too logical and easy. Instead, select the table and tap the backspace key. Goodbye, table. Why? Who knows? It works.

Alternatively, click anywhere in the table (no need to select anything) and in the Layout ribbon choose Delete ➪ Delete Table, as shown in Figure 17-13. Again, the table is gone. If you absolutely, positively need to know how to do it using the delete key, insert a paragraph above or below the table (but outside the table) and include it in the selection. Now when you press Delete the table departs.

You can also kiss the table goodbye by cutting it to the clipboard. Select the table and click the Cut tool, or press Ctrl+X (or Shift+Delete). Of course, this clutters the clipboard, which you might not want cluttered.

FIGURE 17-13

Delete the current cell, column, row, or table using the Layout ribbon's Delete tool.



Deleting Rows, Columns, and Cells

To delete the current row or column you have the same options: Select the offending rows or columns and press backspace, or choose Delete ➪ Delete Columns, Delete ➪ Rows, or Delete ➪ Cells from the Layout ribbon's Delete tool (refer to Figure 17-13).

When deleting cells, Word needs a little more information. You are prompted as shown in Figure 17-14. Make your selection and click OK. Now you know how those rag-eared tables you sometimes see lost their corner cells!

Inserting Rows, Columns, and Cells

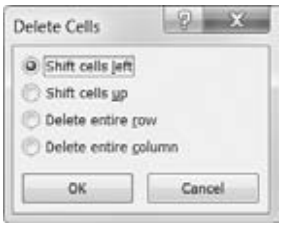
To insert a row or column into a table, click in the row or column adjacent to where you want to insert, and then click Insert Above, Insert Below, Insert Left, or Insert Right, depending on where you want the new row or column to appear. If you miss, you can always drag the new row or column where you want it.

Tip

To add a new row to the end of an existing table, put the insertion point in the bottom right cell and press the tab key. To add additional rows, press F4 (repeat). Or hold the tab key until it repeats, and then continue holding until the table has the desired number of new rows. To add a new interior row, click outside the right side of the table above where you want the new row to appear, and press Enter. ■

FIGURE 17-14

Word prompts to find out how to handle the rest of the column or row when you delete a single cell.



To insert multiple rows or columns you have a couple of options. Select the number of rows or columns you want to insert, and then click the appropriate insert tool. Word will insert as many rows or columns as you have selected. Alternatively, insert a single row or column, and then press the F4 (repeat) key for each additional row or column you need.

To insert cells, select the cell(s) adjacent to where you want the new one(s) to appear, and click the Insert Cells launcher in the bottom right corner of the Rows & Columns group in the Layout ribbon. You'll see a dialog box containing the identical options shown in Figure 17-14. Choose your desired action and click OK.

Controlling How Tables Break

Sometimes you don't particularly care how tables break across pages, but sometimes you do. When you have an opinion, select the row or rows in question and click Properties in the Layout ribbon (or right-click the selection and choose Table Properties from the context menu). In the Row tab under Options, "Allow row to break across pages" is enabled by default. Clear this option if you absolutely, positively don't want the selected row(s) to break.

To force a table to break at a particular point, move the insertion point to anywhere in the row where you want the break to occur, and then press Ctrl+Enter. Note that this doesn't simply force the table to break at that point; it actually breaks the table into two tables. If the "Repeat as header row at the top of each page" setting is enabled, it won't be inherited by the "new" table. You'll need to copy the heading row to the new table and reinstate the setting, if needed.

Merge

Sometimes you need to merge columns, rows, or cells. Merging cells is easy. Select the cells you want to merge and click Merge Cells in the Layout ribbon (refer to Figure 17-13).

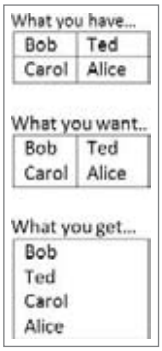
Tip

You want it even easier? Use the table eraser in the Table Tools ➪ Design ribbon. Click the Eraser tool, and then click on the table line segment that stands between Romeo and Juliet. Instant marital bliss. Click the Eraser tool again, or press the escape key to turn it off. Jump ahead to "The Table Eraser" near the end of this chapter for more exciting details. ■

Word can't really merge rows or columns. Suppose, for example, that your table has three columns, and you need to merge each of the cells in two adjoining rows. What you want to end up with is one new row with three new combined cells. If you select both rows and click Merge Cells, however, Word treats that as a request to merge all the cells in the selection, and you end up with one big cell. This is illustrated in Figure 17-15. There is no way around this. If you want the middle result you must merge each set of cells separately (in other words, merge A and F and then merge B and G). To effect a merge of the columns while retaining the rows, you would need to merge A and B, and then F and G.

FIGURE 17-15

Word cannot merge into multiple cells.



Splitting Cells, Row, and Columns

At first it seemed that one cell, row, or column was fine, but later you decide that the logic of the presentation calls for two (or more) where there once was one. In any divorce, amicable or not, one has to divvy up the jointly held property. Like a few of the shadier attorneys, Word seems to think that everything should go to one party, the other getting nothing.

If we reverse the situation illustrated in Figure 17-15, to make a long story short, we end up with all of the data in the upper row, as shown in Figure 17-16.

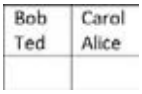
When you split cells using Word's default divorce attorney, you're going to have to manually redistribute the goodies after the split. You get to be the judge!

A better way to manage and control split-ups is to use the Draw Table tool, described later in this chapter. In Table Tools ➪ Design, click the Draw Table tool to set it in motion. Use the tool

to draw a line in a cell between the items you want to separate. The items above the new line go north, and the ones below the line head south.

FIGURE 17-16

When you split cells, Word's distribution logic probably won't agree with yours.



Horizontal splits are often harder to control. The trick is to make sure that items are horizontally displayed and separated either by at least two spaces or by a tab (press Ctrl+Tab to insert a tab inside a table). It can still be tedious, but it's a bit more direct than using the dialog box, and you have a bit more control and precision, Your Honor.

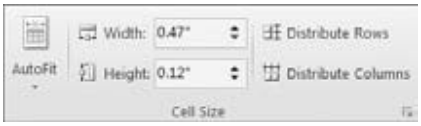
With luck you'll only have four cells to contend with, rather than 400. If you have 400, it might be time to record a macro. See Chapter 48.

Cell Size

When you're using a table to lay out a form, cell measurements sometimes have to be precise, especially when you're trying to align a Word document with preprinted forms. When cell height and width need to be controlled precisely, click the corresponding boxes in the Cell Size group on the Layout ribbon, shown in Figure 17-17. Note that cell height cannot vary for any cell within any given row.

FIGURE 17-17

Use the Cell Size group to specify the precise height and width of rows and columns.



When you need rows to have a uniform height, click the Distribute Rows button. If rows are of different heights — as sometimes happens when you're converting part of an Excel spreadsheet into a Word table — this command determines the optimal height and equalizes the height of all selected rows or of all rows in the table if no rows are selected.

Similarly, click Distribute Columns to set selected or all columns to the same width. If different rows have different widths, this command will not equalize the whole table. It works only when all the rows have the same width. If any differ (e.g. if row two is four inches and all the other rows are 3.5 inches, giving the table a ragged left and/or right edge), it won't equalize them all. To remedy this, drag the right border(s) of shorter or longer rows so that they all align on the left and right.

Alignment

Alignment offers nine options, as shown in Figure 17-18. To set or change cell alignment, click in or select the cells you want to change, and then click the desired tool. As noted elsewhere, many users confuse cell alignment with table alignment. With the whole table selected, this tool will at most set the individual alignment of each cell and won't have any effect on table alignment. Instead, select the whole table and use the Paragraph Alignment tool in the Home ribbon, or use the Alignment setting in the Table Properties dialog box.

FIGURE 17-18

Word offers nine options for cell alignment.



Text Direction

To control text direction in table cells, click the Text Direction tool in the Layout ribbon. This option often makes possible the portrait presentation of tables that otherwise might need to reside in separate landscape document sections.

Cell Margins and Cell Spacing

Word provides several different kinds of controls for cell margins. *Cell margin* is the distance between cell contents and cell walls. Proper margins can keep cells from becoming too crowded. Additional spacing sometimes helps achieve a precise look. It can also prevent data from printing over the borders when you're using a table to format data for printing on preprinted forms. To set cell margins and cell spacing, click Cell Margins in the Layout ribbon, shown in Figure 17-18. This displays the Table Options dialog box shown in Figure 17-19.

Despite the text in the dialog box, it does not set the *default* cell margins or spacing for tables. It sets those only for the currently selected table.

Cell spacing can be used to create the rather cool effect shown in Figure 17-20. This gives the table the appearance of having a distinct box inside each table cell.

Tables That Span Multiple Pages

When a table spans multiple pages, Word can automatically repeat one or more heading rows to make the table more manageable. When the need arises, select the target table's heading rows (you can have multiple heading rows), and click Repeat Heading Rows in the Layout ribbon. The selected heading rows are then repeated where necessary. The setting can be toggled on or off for each individual table. Because the number of heading rows can vary, this setting cannot be made the default for all tables, nor incorporated into a style definition.

This setting has no observable effect on tables that display or print on a single page. It also has no effect on pages displayed in web view, because web pages are seamless and pageless in concept.

FIGURE 17-19

If your table is too crowded, increase the default cell margins.

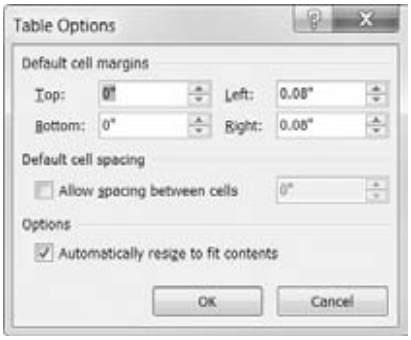


FIGURE 17-20

Cell spacing can give tables a more dramatic appearance.

CPS Year	16-17	18-20	21-24	25-29	30-39	40-49	50-59	60-64	Total Working Age
1994	4,224	5,506	8,063	11,030	25,016	20,848	13,747	5,832	94,266
1995	4,269	5,550	7,821	10,572	24,743	21,197	14,124	5,701	93,977
1996	3,859	5,029	6,486	9,017	21,265	19,087	12,242	4,917	81,902
1997	4,032	5,161	6,414	9,278	21,094	19,266	12,963	5,048	83,256
1998	3,980	5,122	6,250	8,990	20,723	19,545	13,642	5,044	83,296
1999	3,955	5,189	6,397	8,697	20,538	20,098	14,020	5,024	83,918
2000	3,963	5,395	6,609	8,828	20,358	20,255	14,696	5,168	85,272
2001	3,851	5,124	6,443	8,203	19,240	19,902	14,564	5,044	82,371
2002	7,677	8,799	9,800	12,814	33,507	35,006	22,305	7,067	136,975
2003	7,583	8,803	9,938	12,707	32,293	35,212	22,967	7,540	137,043
2004	7,608	8,635	9,939	12,373	30,770	34,694	23,792	7,608	135,419
2005	7,353	8,346	9,873	12,512	30,110	33,540	23,920	7,656	133,310
2006	7,626	8,414	9,897	12,614	29,253	32,950	24,481	7,730	132,965
2007	7,425	8,316	9,460	12,688	28,676	32,230	24,925	8,131	131,851
2008	7,408	8,344	9,609	12,731	28,275	31,697	25,268	8,728	132,060

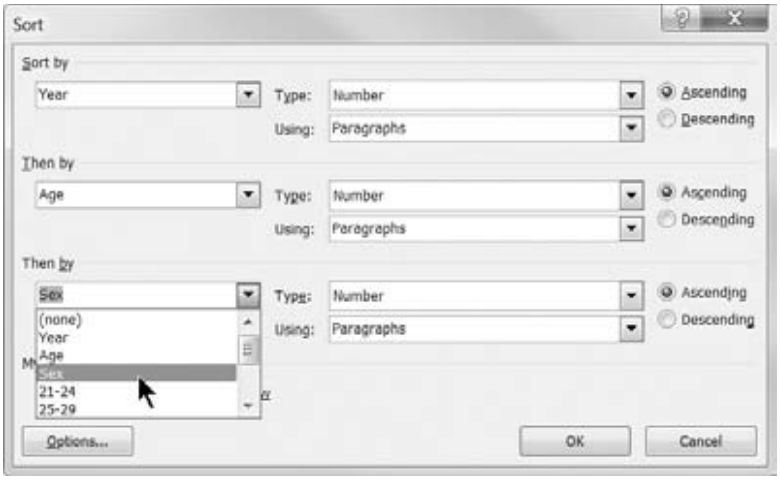
Sorting Tables

Word provides a flexible and fast way to sort data in tables. As noted in Chapter 8, it can also sort lists that aren't in tables. To sort a table, click anywhere in the table and click the Sort tool

in the Layout ribbon. Word displays the Sort dialog box, shown in Figure 17-21. If the table has headings at the top of each column, enabling the Header Row setting does two things. First, it provides labels in the "Sort by" and "Then by" drop-down lists. Second, it excludes the header row from the sort. Unlike the previous feature, this one allows only a single header row.

FIGURE 17-21

The Sort command lets you sort by up to three fields.



To sort, set "Sort by" to the first field. Setting Type to Text, Number, or Date affects the way data is sorted. For Year and Age, shown here, sorting by number ensures that the correct sorting order will be used. Choose the desired order, Ascending or Descending. If you have additional sort fields, use "Then by" to include up to two of them. Click Options to determine additional settings, including how fields are separated (for non-table sorts), whether to make the sort case-sensitive, and the sorting language. Click OK to close Sort Options, and then click OK to do the sort.

Table Math

Word can perform some calculations using the Formula tool shown in the Layout ribbon in Figure 17-8. It is limited, however, and is subject to hard-to-spot errors. If you use Word for math, double-check all calculations using a calculator or Excel. But if you have Excel and you need math in tables, then use Excel, period. You can then link the results to Word. See Chapter 53 for additional information on using Excel with Word.

Modifying Table Design

Word 2010 provides a number of powerful tools to help you quickly enhance the look and feel of your tables. One of these tools, Table Styles, features live preview. In this section we'll look only at the features contained in the Table Tools Design ribbon, shown in Figure 17-22.

Table Styles

Word 2010 has a number of preset table styles that you can apply to any table. They provide a wide variety of different kinds of formatting that can be previewed live in your table. You can use these styles to ensure a consistent, professional look. You can also modify them and save the modified versions for later use.

FIGURE 17-22

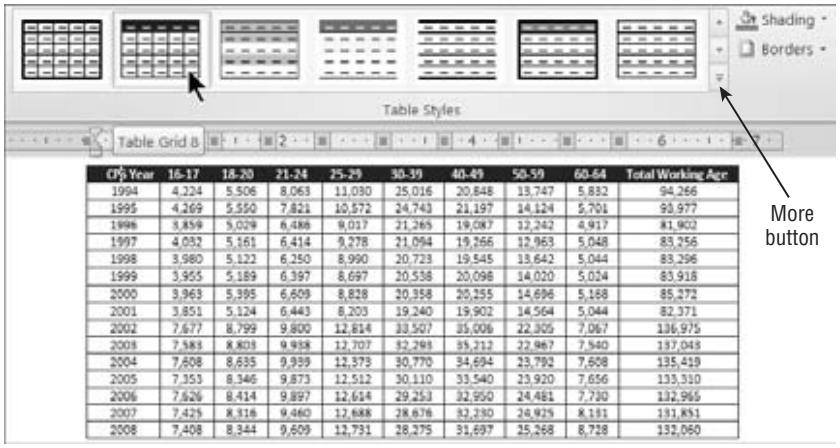
The Table Tools Design ribbon provides access to six preset table style options and a gallery of table styles.



To use a table style, click anywhere in the target table to activate the Table Tools ribbon. Under Table Tools, click Design. In Table Styles, hover the mouse over different styles and observe the changes to your table. As you move the mouse, tooltips display the name of the selected table style (such as Table Grid 8), as shown in Figure 17-23.

FIGURE 17-23

As you move the mouse over different table styles, the currently selected table displays a live preview of the formatting.

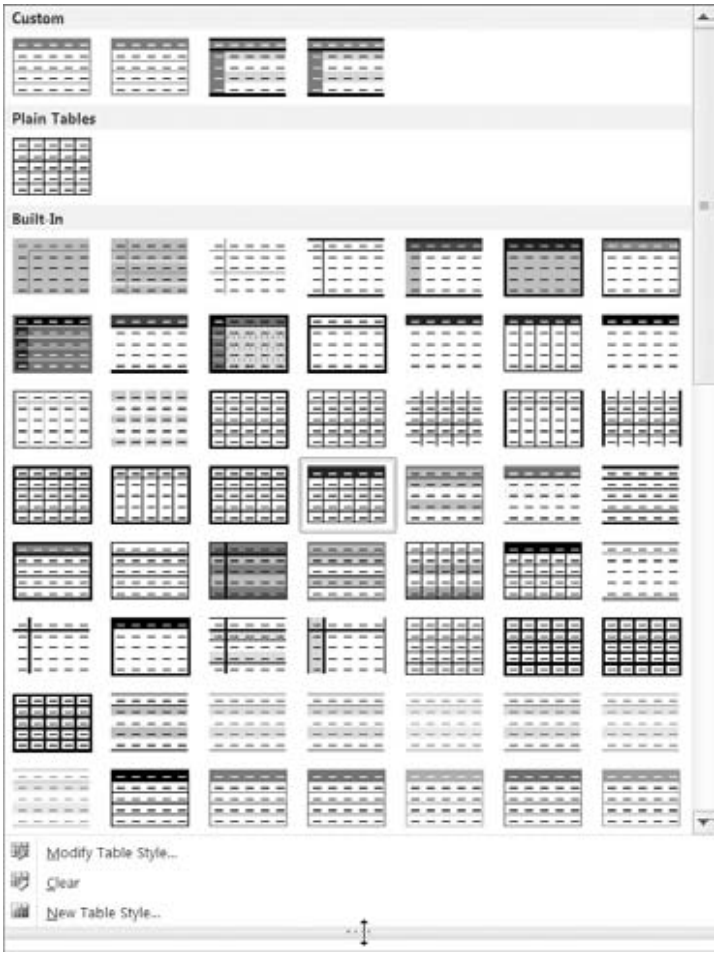


CPS Year	16-17	18-20	21-24	25-29	30-39	40-49	50-59	60-64	Total Working Age
1994	4,224	5,506	8,063	11,030	25,016	20,848	13,747	5,832	94,266
1995	4,269	5,550	7,821	10,572	24,743	21,197	14,124	5,701	93,977
1996	3,859	5,029	6,486	9,017	21,265	19,087	12,242	4,917	81,902
1997	4,032	5,161	6,414	9,278	21,094	19,266	12,963	5,048	83,256
1998	3,980	5,122	6,250	8,990	20,723	19,545	13,642	5,044	83,296
1999	3,955	5,189	6,397	8,697	20,538	20,098	14,020	5,024	83,918
2000	3,963	5,395	6,609	8,828	20,358	20,255	14,696	5,168	85,272
2001	3,851	5,124	6,443	8,203	19,240	19,902	14,564	5,044	82,371
2002	7,677	8,799	9,800	12,814	33,507	35,006	22,305	7,067	136,975
2003	7,583	8,803	9,938	12,707	32,293	35,212	22,967	7,540	137,043
2004	7,608	8,635	9,939	12,373	30,770	34,694	23,792	7,608	135,419
2005	7,353	8,346	9,873	12,512	30,110	33,540	23,920	7,656	133,310
2006	7,626	8,414	9,897	12,614	29,253	32,950	24,481	7,730	132,965
2007	7,425	8,316	9,460	12,668	28,676	32,280	24,925	8,181	131,851
2008	7,408	8,344	9,609	12,731	28,275	31,697	25,268	8,728	132,060

If you see a style you like, click it to apply it to your table. If it's not perfect you can modify it. If you don't see a style you like, click the More button to the right of the table styles that are showing. Word will display the full Table Style Gallery, showing custom, plain, and built-in table styles, as shown in Figure 17-24.

FIGURE 17-24

The Table Style Gallery enables you to test-drive dozens of built-in table styles.



To modify the currently displayed table style, click Modify Table Style just below the Table Style Gallery, which will display the Modify Style dialog box, shown in Figure 17-25. You can use the Modify Style dialog box to apply style formatting, as described in Chapter 9.

For additional options, right-click a table style in the gallery to call up the menu shown in Figure 17-26. Note the Set as Default option. This option enables you to set the selected table style as the default for all tables in the current document, or as the default for all future tables in documents based on the current template. This enables you to easily achieve a consistent look for tables you add to your documents.

FIGURE 17-25

If you type a new name, the style will be saved as a custom style in the Table Styles Gallery.

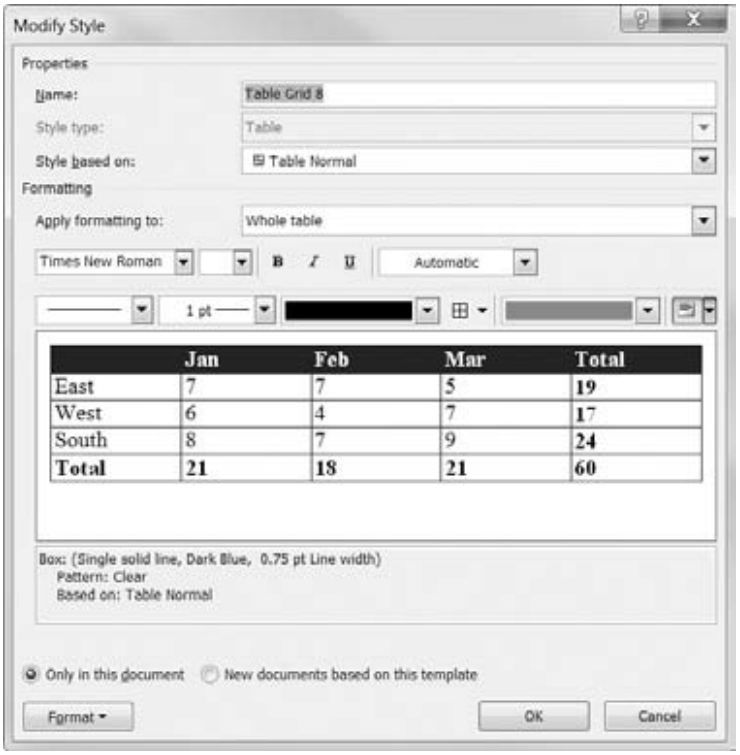


FIGURE 17-26

For additional options, right-click any table style in the gallery.



Note

Making this your default table style does not apply the style to existing tables. You would need to do that using the method described earlier (albeit one table at a time). Note also that the Modify Style dialog box for table styles lacks the Automatically Update option. That denies you the potential utility or the disastrous

consequences (take your pick) to which that button might lead given the preponderance of documents based on the `Normal.dotm` templates. ■

Table Style Options

Word provides access to six options, shown in Figure 17-22, that it can automatically apply to your table. For these to work, the table must have been formatted with one of the Built-In table styles instead of the Plain Table style shown in Figure 17-24. Click to check to apply those features to your tables, or remove checks to turn the corresponding features off. Table style options provided are as follows:

- **Header Row:** Applies special formatting to the entire top row in your table.
- **First Column:** Applies special formatting to the entire first column.
- **Total Row:** Applies special formatting to the last row, except for the first cell.
- **Last Column:** Applies special formatting to the last column, except for the top cell.
- **Banded Rows:** Alternates shading in rows to create a horizontal striping effect. This helps the reader focus on specific rows.
- **Banded Columns:** Alternates shading in columns to create vertical stripes, focusing the reader on columnar comparisons.

Each of the style options works together with the table styles. Each table style might have any of these attributes enabled. Use the checkboxes to add or remove attributes.

Shading

Shading refers to the background color for tables, which can be applied individually to cells, rows, or columns, or to a complete table. Shading sometimes is used to draw attention to one or more elements of a table.

Shading is a live preview attribute. As shown in Chapters 7 and 8, you apply shading by selecting the part of the document you want shaded and then using the Shading tool, as shown in Figure 17-27. You can use either of the Shading tools in the ribbon to shade a table, not just the one in the Design ribbon. The Home ribbon's Shading tool also works.

Tip

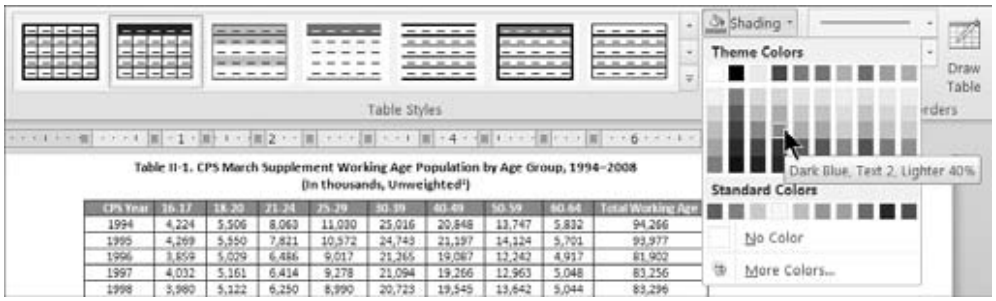
You'll be looking at themes in more detail in Chapter 31, "Templates and Themes," and Chapter 28, "On Background." Notice, however, that if you choose a background color from among the ten theme colors, then changing document themes (in the Page Layout ribbon) will automatically apply different shading to your tables. ■

Borders and Table Drawing

Borders are lines that separate a table into cells, rows, and columns. You've seen in other chapters that borders are not unique to tables, and can be applied to characters and paragraphs as well. They also can be applied to other Word document elements, such as text boxes, frames, and graphics. Any of the border tools can be used to control borders in tables. None of the border tools offer live preview, although the Borders and Shading dialog box does provide a generic preview.

FIGURE 17-27

If you apply one of the theme colors to shade a table, the table shading will change when different themes are applied.

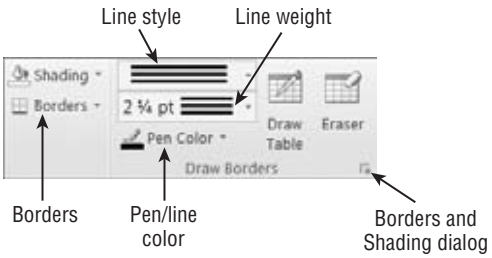


You have two strategies for working with borders. You can use the holistic approach by launching the Borders and Shading dialog box. For a detailed description of how to apply borders using the Borders and Shading dialog box, see the "Borders and Boxes" section in Chapter 8.

The second strategy uses an ad hoc approach, by using the Borders, Line Style, Line Weight, Pen Color, Draw Table, and Eraser tools in the Design ribbon, shown in Figure 17-28. Much, if not all, of what you can do using the Borders and Shading dialog box you can also do using the Borders tool, in combination with the Draw Borders group in the Design ribbon. Use whichever method works better for you, and it doesn't have to be the same method or set of tools each time.

FIGURE 17-28

Use the Borders tool and its friends to perform ad hoc editing on table borders.

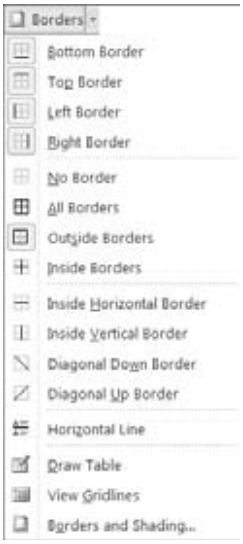


You should experiment with the Borders tool and its friends to get a feel for how they work. Even if you generally prefer the dialog box approach, the individual tools are great when you want to touch up or polish the look of a table. Keep in mind that you can use Ctrl+Z to remove the last effect applied, and F4 to reapply the most recent effect to a new selection.

When you use the Borders tool it applies the current style, weight, and color shown in the Draw Borders group. For example, if you use the Borders tool in the configuration shown in Figure 17-28, the line style will be the triple line shown, 2 1/4 points, and black (which might be hard to see in a book with grayscale pictures). Therefore, to apply a black, 2 1/4 point triple line to the outside perimeter of the currently selected table cells, rows, columns, or complete table, choose Borders ➪ Outside Borders, as shown in Figure 17-29.

FIGURE 17-29

Use the Borders tool to apply borders by name, remove borders (No Border), draw a horizontal line, display gridlines, and launch the Borders and Shading dialog box.



You can also change existing borders using the Draw Table tool. Like the Borders tool, the Draw Table tool takes its cue from the currently selected style, weight, and color.

To change a particular border to blue without changing the other border attributes, for example, use the style and weight controls to reset those controls so that they match the current border settings. Use the Pen Color control to choose the shade of blue that you want. Finally, click Draw Table to turn the tool on (the button will look pushed-in), and then click each of the borders you want dyed blue. Note that the Draw Table tool affects only one border at a time.

To turn the Draw Table tool off, either click it again (it's a toggle) or press the escape key.

Note

Using either the Draw Table tool or the Borders tool, it's possible to place *ugly* diagonal lines in table cells. Unfortunately, the effect is purely visual, not functional. You cannot place data above and below those

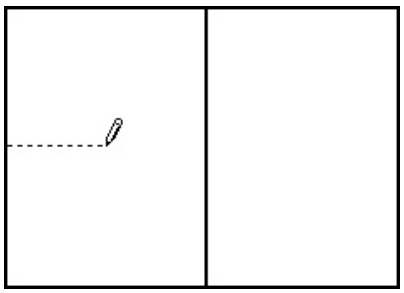
lines. Some folks use these ugly lines to indicate that the cells contain no data. Some might well imagine that emptiness or subtle shading conveys the same information, and somewhat more elegantly and eloquently. It's all a matter of style and aesthetics. If you want ugly diagonal lines and Xs in your tables (yes, the diagonals can go both ways at the same time), it's entirely up to you. It's your table. ■

Drawing Tables from Scratch

You can also use the Draw Table tool to draw tables from scratch. In the Insert ribbon choose Table ➪ Draw table. Use the table pen to drag to form an overall outline of the table. Then use the pen to add rows or columns, as shown in Figure 17-30. If necessary you can use the Layout tools later to touch up any cell, row, or column dimensions that need to be adjusted.

FIGURE 17-30

Use the Draw Table tool to create tables from scratch, as well as to expand, extend, and modify existing tables.



The Table Eraser

The eraser is a powerful tool, and perhaps misunderstood. The eraser actually erases parts of tables. It doesn't merely remove border lines. It actually deletes the table structure it touches.

No, it won't leave a hole in the middle of the table where non-table text can leak through (although that would be really cool). What it can do, however, is turn interior cells into a larger interior cell. Or, if you've ever wanted to knock a table's block off, now's your chance. You can use the table eraser to remove corner cells from tables. In some presentations the top left corner cell serves no purpose, so why tolerate its presence? Erase it!

To dismiss the eraser, either click the Eraser tool again to toggle it off, or press the escape key. The eraser also goes away if you click outside a table (i.e. in regular text).

Summary

In this chapter, you've learned just about everything there is to know about tables. You know a quick way to insert a whole table, and several ways to create a table from scratch. You also

know how to modify and format tables using a variety of tools and techniques. You should now be able to do the following:

- Copy material from one table into another, even if the dimensions don't match
- Use the table eraser to remove unwanted parts of tables
- Use table styles to add zest and color to your tables
- Create tables from existing non-tabular data
- Use the ribbon tools to modify table layout and design

CHAPTER 18

Pictures and SmartArt

Is a picture really worth a thousand words? It's up to you. Pictures for their own sake might simply clutter up a document and make it more time-consuming to send to somebody and more expensive to print. Used carefully, pictures enable you to show the reader what you mean. Yes, used the right way, pictures can save many paragraphs of explanation, so perhaps a picture *is* worth a thousand words — maybe more. If not, there wouldn't be so many pictures in this book, helping to illustrate ideas.

This chapter won't help you decide whether to include pictures. It won't tell you what pictures to use. It will, however, show you where to find pictures if you don't have any, how to insert pictures and other graphics, how to work with pictures once they're in your document, and how to negotiate the precarious relationship between pictures and text.

IN THIS CHAPTER

- Inserting pictures from files
- Finding pictures on the Internet
- Working with graphics
- Using clip art
- Using Word 2010's SmartArt tools

Inserting Pictures from Files

You can insert pictures in Word in several ways, using pictures from a variety of different graphics formats. We'll look at formats shortly.

If you have pictures on removable media — such as SD (secure digital), CF (compact flash), CD, DVD, or USB drive — it's usually best if those pictures have been copied to your hard drive before you proceed. While you can insert directly from such sources, or from a LAN or over the Internet, you have more options available to you if the files are on your own computer in a location that is always accessible.

You might also have pictures available from a webcam, another camera, or a scanner connected to your computer. Assuming the formats are supported, those also can be inserted into Word — but usually not directly. You'll usually copy them to your hard drive first.

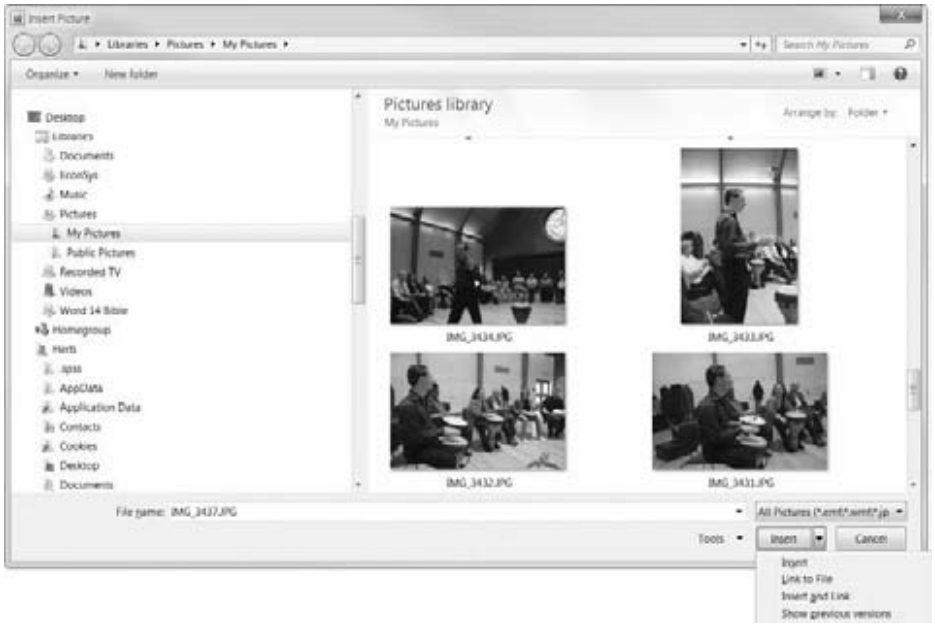
While it's not necessary, computing life is usually easier when pictures, sounds, and other files are where Word and other programs expect them to be. In the case of pictures, the expected location is your Pictures LibraryLibrary (or My Pictures, if you're not using Windows 7). You'll see why in this chapter. I'm going to assume that you've either copied the picture(s) you want to use to one of the folders in the Pictures Library, or that you otherwise know where to find them.

I'm also going to assume that you're working with Word 2010 `.docx` files, and not Word 97–2003 Compatibility Mode files. This matters because things are a bit different in Compatibility Mode. In Compatibility Mode, linking of picture files is accomplished with the INCLUDEPICTURE field. In Word 2010 mode, linking is accomplished with XML relationships.

To insert a picture at the current insertion point, choose Insert ➪ Picture, which displays the Insert Picture dialog box. Assuming the picture is listed there, select it, but don't double-click it yet. As shown in Figure 18-1, click the drop-down arrow next to Insert to view the Insert options.

FIGURE 18-1

When you insert a picture, Word's default search location is the My Pictures folder in the Pictures Library.



When you're inserting a picture this way, Word offers three options:

- **Insert:** The picture is embedded in the current document. If the original is ever deleted or moved, it will still exist in your document. If the original is ever updated, however, your document will not reflect the update. The document file will be larger because the original image is stored in the `.docx` file. If neither file size nor updates are important, this is the best option.

- **Link to File:** A link to the picture is inserted, and the picture is displayed in the document. The document file will be smaller — often dramatically smaller — because the image is external to the Word document. If the original file is moved or deleted, it will no longer be available for viewing in the document, and you will see the upsetting and confusing message shown in Figure 18-2 (see the following Caution for more information). On the other hand, if the image is modified or updated, the update will be available and displayed in Word. If file size is an issue but the availability of the image file is not, then this is the best option.
- **Insert and Link:** The image is both embedded in the document and linked to the original file. If the original file is updated, the picture in the document will be updated to reflect changes in the original. Because the file is embedded, the document will be larger than it would be if only linked. However, the document will not be larger than it would be if only inserted. If file size is not an issue but updates are, this is the best option.

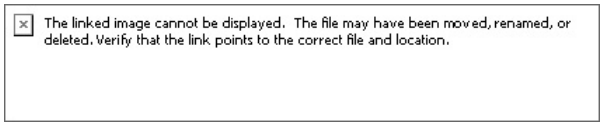
Caution

If a link is broken, it can be confusing to discover the name of the missing file(s), especially if you're accustomed to Word 2003 or earlier. That's because linked files are not linked via field codes. You can't toggle field codes to discover the name. If you right-click the picture, there is no menu item that will tell you the name of the file. To discover the name, choose File ➪ Info ➪ Edit Links to Files. In the Links dialog box, the name of the file is shown next to Source File.

Note the Update Now button. If you restore a missing file and click Update Now, in theory the picture should replace the red X and error message. It does not always work, however — nor does pressing F9. What does usually work, however, is to save and close the file, then reopen it. When opening files, Word does a better job of checking and restoring links than the Update Now button does. ■

FIGURE 18-2

If a linked, non-embedded picture is moved, renamed, or deleted, Word will not be able to display it.



If Your Picture Format Isn't Supported

If the picture you want doesn't appear in Word's Insert Picture dialog box but you know that it's really there, in the lower right corner, drop down the file type list shown in Figure 18-3 to verify that Word supports the format. If your picture format isn't supported, there are several possible reasons.

The most popular picture format, used by most digital cameras, is JPG, which stands for Joint Photographic Experts Group (so if you didn't know before, you do now). Word 2010 comes with a converter that supports .jpg files. Other Word 2010–supported popular formats include .gif, which is heavily used on the Internet (because of support for transparent backgrounds,

which makes such images better suited for web page design), .png, .wmf, and .bmp. Note that the latter two are natively supported by Word, and do not require special converters.

FIGURE 18-3

Word supports a number of popular graphics formats, but some formats do not come with Word 2010.



Which formats are supported by your installation of Word depends on several things. Several graphics converters are installed as part of Office 2010's Shared Features. Those converters are shown in Figure 18-4. Other converters installed by other programs might also be available. If you had Office 2000 or Office XP installed on your computer and upgraded to Office 2010, additional converters possibly were installed as well.

If your file uses any of the formats that come with Office 2010 but they don't show up in the Pictures Library, it's probable that you didn't install all of the converters. To add the missing converters, from Windows Control Panel search for Programs and Features, and locate Microsoft Office 2010. The precise name depends on which flavor of Office 2010 you have.

Click Change ➪ Add or Remove Features ➪ Continue. Expand Office Shared Features ➪ Converters and Filters ➪ Graphics Filters. Drop down the arrow by Graphics Filters and choose "Run all from My Computer," as shown in Figure 18-5. While you're here, you might want to install all the text filters as well. You never know when they might come in handy. Click Continue and follow any instructions (which might or might not include inserting the original Office 2010 DVD or CD). When you're done, go back and check whether your picture format is now supported.

If your file format isn't supported natively by Word 2010, try searching for a "converter pack" on Microsoft's support site for Office and see what you can find. Choose File ➪ Help ➪ Check for Updates. Once there, type **converter pack** in the Search box, and click Go. As of this writing, several are listed, although it's not clear that they add any graphics-conversion capabilities to Word 2010. A specific Internet search for the format you need might be more productive. If that fails and you have a photo editing program of some kind, try opening the file using that program, then save the file in a format that Word can handle, such as .jpg.

FIGURE 18-4

Office 2010's Setup shows graphic filters available for use with Word and other Office 2010 applications.

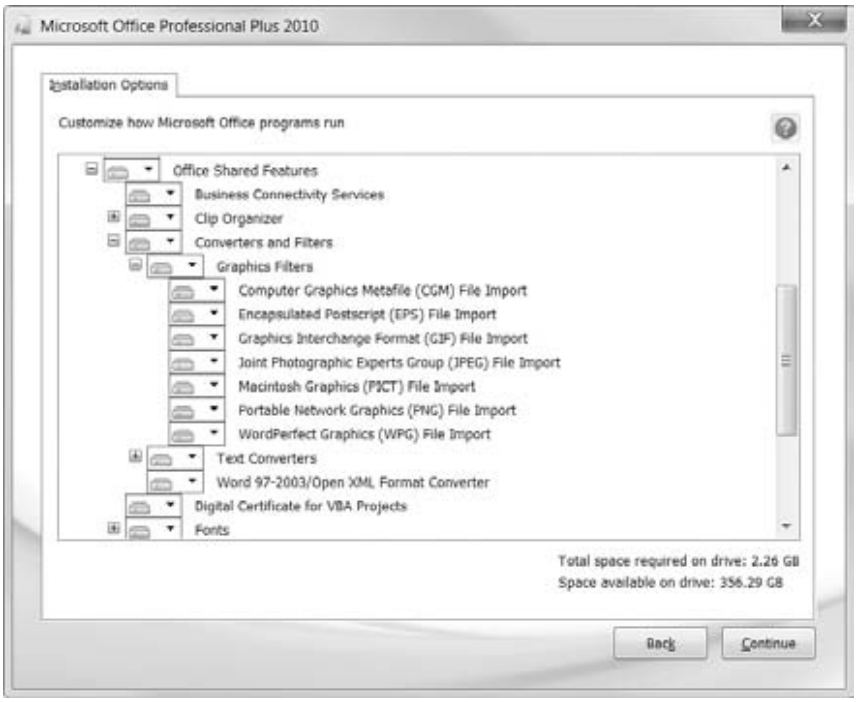
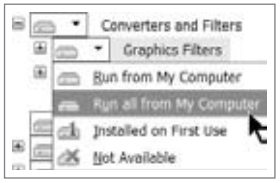


FIGURE 18-5

Converters and filters are relatively small files; it pays not to skimp when installing them.



Pictures from the Clipboard and Internet

You can also insert pictures from the Clipboard and from your Internet browser (usually, but not always). To use the Clipboard, display the picture in any Windows program that supports graphics, and use that program's controls to select and copy the picture to the Clipboard. If all else fails, try right-clicking the picture and choosing Copy or Copy Picture. Then, in Word, move to where you want the picture, and press Ctrl+V (or click Paste in the Home ribbon).

Sometimes the copy-and-paste method works from Internet Explorer, Firefox, Google Chrome, and other popular browsers — other times not. When the Clipboard method fails, or when you want a copy of the file itself (not simply the embedded version in a Word document), you can try several things.

In Firefox, right-click the picture and choose Save Image As. In Save Image, navigate to where you want to store the file, accept the name shown or type a new one (no need to type an extension — Firefox automatically supplies it), and click Save. In Internet Explorer, right-click the picture and choose Save Picture As. Again, navigate to the desired location, pick a filename, and click Save.

Tip

If you're harvesting a number of files from an Internet browser, open a copy of Windows Explorer and navigate to where you want to store the pictures. Using the left mouse button, drag the pictures from your browser and drop them into Windows Explorer. Click Yes to confirm the copying of each file, and then continue. Before doing this, however, please make sure that you have a right to do this. Many pictures on the Internet are copyright protected. ■

There are a number of ways to find pictures on the Internet, from surfing to explicitly searching. Google itself has an Image Search feature. From Google's home page, click Images. In the Image Search page, type the search text (enclose in quotes to search for a whole name), and click Search Images. Another common technique is to include the word "gallery" in the search, although these days you'd probably find a lot of Office 2010 gallery hits!

Manipulation 101

Now that you've got those pictures, what are you going to do with them? Word 2010 provides a number of cool tools that really expand your presentation options. What you can do with pictures depends on how they "live" in the Word document. We'll look at the various wrapping options and their implications and then move on to working with pictures, knowing that there are some constraints. Keep in mind also that this discussion is about working with Word 2010 format documents. If we were to deal with Word 97–2003 format, this book might need another 900 pages because the methods are so different.

Wrapping

Wrapping is the term used to classify the various ways in which pictures (as well as other graphics) are used in a Word document. It helps to understand that a Word document has several different *layers*. Where you normally compose text is called the *text layer*. There are also *drawing layers* that are both in front of and behind the text layer. A graphic inserted in front of the text layer will cover text up, unless the graphic is semitransparent, in which case it will modify the view of the text. Graphics inserted behind the text layer act as a backdrop, or background, for the text.

Additionally, there is the *header and footer layer*. This is where headers and footers reside. This area is behind the text area. If you place a graphic into a header or footer, the graphic will appear behind the text. Dim graphics placed in the header and footer layer often serve as

watermarks. Sometimes the word CONFIDENTIAL will be used in the header and footer layer, branding each page of the document as a caution to readers. See Chapter 28, "On Background," for more information about watermarks.

Setting Wrapping and Wrapping Defaults

Wrapping determines how graphics interact with each other and with text. Different wrapping settings are shown in Table 18-1. To set the wrapping behavior of a graphic, double-click it and then click the Wrapping tool in the Arrange group (in Picture Tools ➪ Format ribbon tab, or in the Page Layout tab). Choose the desired wrapping from the list shown.

You can also set the default wrapping. If you're a long-time Word user, you likely already have a default wrapping style that suits your generic needs. If not, then in time you likely will find that you frequently change the wrapping from the default to something else. If that happens a lot, you can save yourself a step by setting the wrapping default to your usual setting.

To set the default wrapping style for most graphic objects you insert, paste, or create, choose File ➪ Options ➪ Advanced. In the "Cut, copy, and paste" section, use Insert/paste pictures as to set wrapping to any of the options shown in Figure 18-6. This setting determines the default for most, but not all, graphics inserted into Word.

FIGURE 18-6

Wrapping behavior determines what you can do with a picture in Word.



Notable exceptions are shapes (the leftmost group in the Insert ribbon) and textboxes. Shapes and textboxes can be set to any wrapping style after the fact, but they are always inserted as "In front of text." Another exception, of sorts, stems from the fact that if you copy a picture from one part of a document and paste it elsewhere, it will inherit the wrapping style of the original picture, and won't use your default.

Knowing how you plan to use a picture and what you need to do to it should determine the wrapping setting. Wrapping effects and typical uses are shown in Table 18-1. Wrapping comes in two basic flavors: In line with text (in the text layer) and floating (in the graphics layer, which includes the other six wrapping formats shown in Table 18-1). *Floating* means that the picture can be dragged anywhere in the document and isn't constrained in the way that pictures in the text layer of the document are.

TABLE 18-1

Wrapping Styles

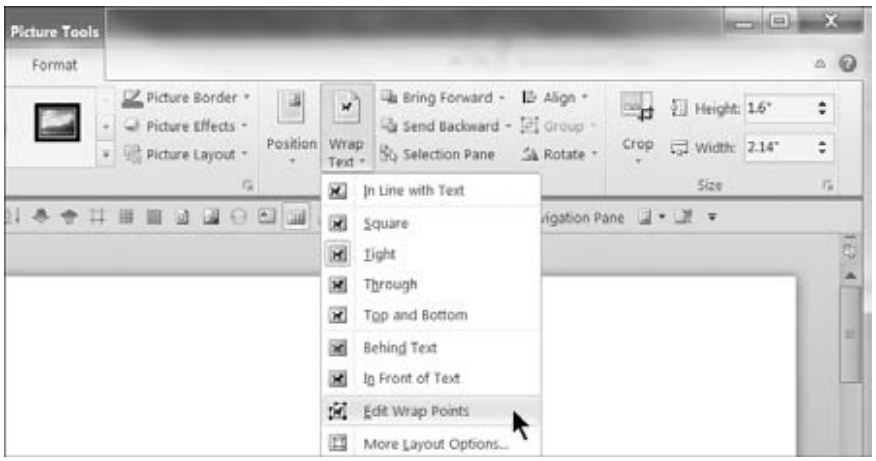
Wrapping Setting	Effect/Application
In line with text	Inserted into text layer. Graphic can be dragged, but only from one paragraph marker to another. Typically used in simple presentations and formal reports.
Square	Creates a square ''hole'' in the text where the graphic is. Text wraps around the graphic, leaving a gap between the text and the graphic. The graphic can be dragged anywhere in the document. Typically used in newsletters and flyers with a fair amount of white space.
Tight	Effectively creates a ''hole'' in the text where the graphic is, of the same shape as the overall outline of the graphic, so that text flows around the graphic. Wrapping points can be changed to reshape the ''hole'' that the text flows around. The graphic can be dragged anywhere in the document. Typically used in denser publications in which paper space is at a premium, and where irregular shapes are acceptable and even desirable.
Behind text	Inserted into the bottom or back drawing layer of a document. The graphic can be dragged anywhere in the document. Typically used for watermarks and page background pictures. Text flows in front of the graphic. Also used in the assembling of pictures from different vector elements.
In front of text	Inserted into the top drawing layer of a document. The graphic can be dragged anywhere in the document. Text flows behind the graphic. Typically used only on top of other pictures or in the assembling of vector drawings, or when you deliberately need to cover or veil text in some way to create a special effect.
Through	Text flows around the graphic's wrapping points, which can be adjusted. Text is supposed to flow into any open areas of the graphic, but evidence that this actually works is in short supply. For all practical purposes, this appears to have the same effects and behavior as Tight wrapping.
Top and bottom	Effectively creates a rectangular hole the same width as the margin. Text flows above and below, but not beside, the graphic. The picture can be dragged anywhere in the document. Typically used when the graphic is the focal point of the text.

Changing Wrap Points

For Tight and Through wrapping, you can change the wrap points. To edit the wrap points, click the picture (you might need to click twice), and then choose Wrap Text ➪ Edit Wrap Points from the Arrange group in the Picture Tools ➪ Format ribbon, or from the Arrange group in the Page Layout ribbon, as shown in Figure 18-7. If too much white space is showing, you can reduce it by moving the wrap points closer to the object. If you want to create a special effect in the form of a starburst or other pattern, you can drag the wrap points outward and inward.

FIGURE 18-7

Use Edit Wrap Points to change the way text flows around a picture.



Dragging and Nudging

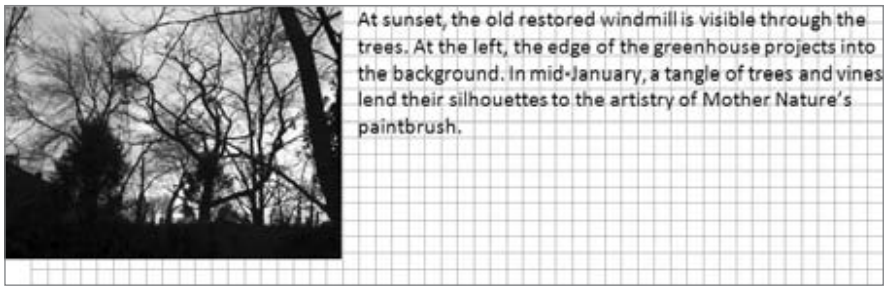
You can move any graphic by dragging it, and some graphics can be dropped anywhere in the document. Graphics inserted as "In line with text," however, can be dropped only at a paragraph mark. All other graphics can be dragged and dropped anywhere. The techniques described in this section apply only to floating graphics (i.e., not "In line with text"). As described earlier, what happens when you drag a graphic is determined by the wrapping that is applied.

To drag a graphic, click to select it, and then drag it where you want it to go. You can also *nudge* a selected floating graphic. Select it, and then use the cursor keys to nudge it in any of the four directions.

To drag in discrete steps using Word's built-in invisible drawing grid, hold the alt key as you drag. If you make Word's gridlines visible (View ➪ Gridlines), however, the effect of the alt key is reversed. Now holding alt while dragging makes Word ignore the grid, shown in Figure 18-8. With the grid displayed, cursor key nudging also changes. Now the cursor keys move the picture in grid steps. Press the control key to nudge in smaller gradations. Each grid mark is an eighth of an inch.

FIGURE 18-8

Enable Gridlines in the View ribbon for help in planning graphic placement.



Note that gridlines is a Word-wide display setting. If you have other documents open in the same Word session, they too will be gridded. Why am I suddenly craving waffles?

Resizing and Cropping

Resizing changes the physical dimensions of the picture as it is displayed in your document. Resizing in Word will not make the associated file (or the image stored in the `.docx` file) any larger or smaller. If you make it smaller and then later make it larger, you still retain the original file resolution.

Cropping refers to blocking out certain portions of a picture by changing its exterior borders. You can crop out distracting or unnecessary details. Again, cropping in Word does not affect the actual picture itself, only the way it is displayed in Word. The fact that Word doesn't change the actual image is a big plus, because you preserve your options if you later change your mind.

Caution

Resizing and cropping in Microsoft Office Picture Manager and other graphics programs does change the picture itself. Keep this distinction in mind. Once you've saved a cropped or resized picture in Picture Manager, you can't get the original back (unless you saved a backup copy, of course). ■

Resizing

You can resize a picture by typing the measurements or by dragging. To resize by dragging, click on the picture and then move the mouse pointer so that it's over one of the eight sizing handles. The mouse pointer changes into a double arrow, as shown in Figure 18-9. Drag until the picture is the desired size and then release the mouse button. Note that dragging the corner handles maintains the aspect ratio of the picture, while dragging the side handles can be used to stretch or compress the picture.

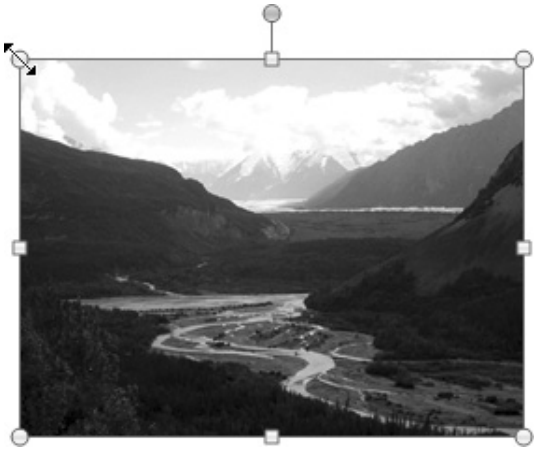
Hold down the control and/or alt keys while dragging to modify the way resizing occurs:

- To resize symmetrically, causing the picture to increase or decrease by the same amount in opposite directions, hold down the control key while dragging.

- To drag in discrete steps, hold down the alt key while dragging; if gridlines are displayed, the alt key's behavior is reversed, as indicated earlier.

FIGURE 18-9

Resize a picture or other graphic by dragging any of the eight sizing handles.



You can combine these options. For example, holding down the alt and control keys at the same time forces Word to resize in discrete steps while resizing symmetrically.

Note

Use the solitary green handle above the center of the picture to rotate the picture. ■

To specify the size of the picture exactly, click in the Height and/or Width box in the Size group in the Picture Tools Format ribbon. By default, these settings maintain the aspect ratio automatically. To distort the picture, click the Size dialog box launcher in the Size group. Remove the check next to "Lock aspect ratio," as shown in Figure 18-10.

Tip

If a picture is not in line with text, you can resize and rotate using the arrow keys. Alt+Left/Right rotates the picture. Shift+Up/Down/Left/Right resizes the picture symmetrically. If you add the control key at the same time, the rotation or resizing is done in finer gradations. ■

Cropping

To crop a picture, click the Crop button in the Size group in the Picture Tools ➪ Format tab, shown in Figure 18-11. The selected picture sprouts cropping handles, as does the mouse pointer. Move the pointer over any of the eight cropping handles and drag to remove the part of the picture you want to hide. Note that the Alt key crops in discrete steps. You can also crop using the Size dialog box, as shown in Figure 18-10.

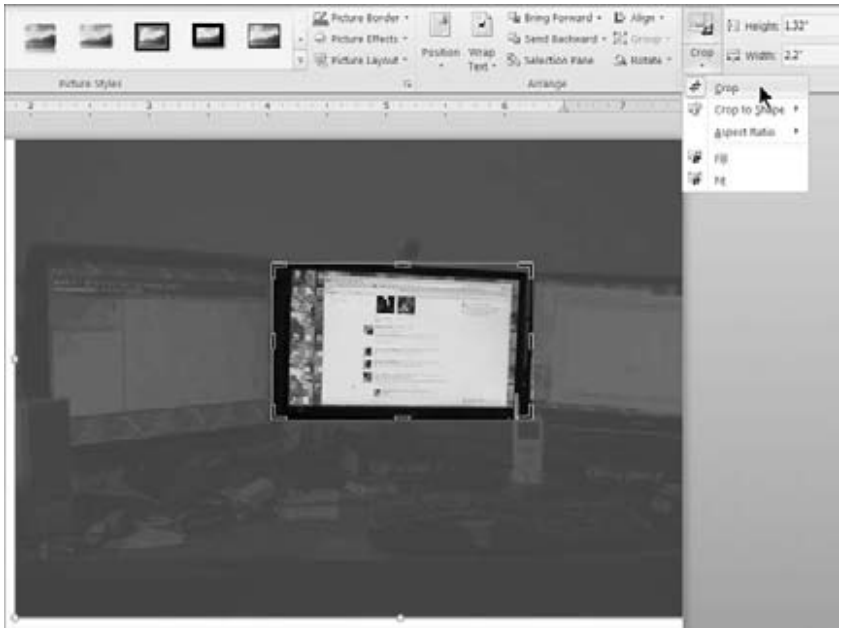
FIGURE 18-10

''Lock aspect ratio'' is enabled by default; to distort a picture's dimensions, turn it off.



FIGURE 18-11

Crop to hide part of a picture to focus the reader's attention.

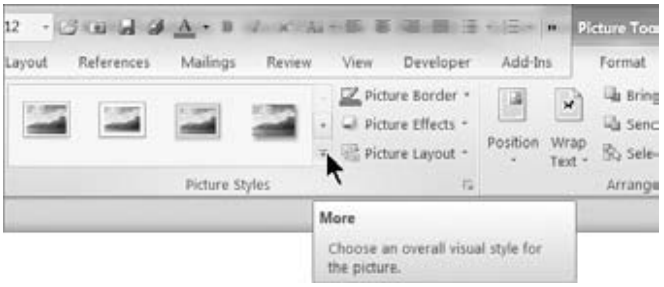


Picture Styles

Word 2010 provides a variety of tools for controlling the presentation of graphics. To the extent possible, use the ribbon to apply the basic effects; then use additional tools to refine the effect for more precision, if needed. The Picture Styles Gallery provides a variety of different presentation styles. Double-click a picture to activate the Picture Tools Format tab. In the Picture Styles group, shown in Figure 18-12, click the More tool to expose more of the gallery.

FIGURE 18-12

Click the More button to expose more picture styles.



As suggested by Figure 18-13, when you move the mouse, each style is applied to the selected picture (or pictures). Note that the speed of live preview is heavily affected by the size of the graphic file. If the picture is 2 MB, live preview is going to be a lot slower than if the file were only 50 K.

FIGURE 18-13

Effects of each style are previewed as you move the mouse.

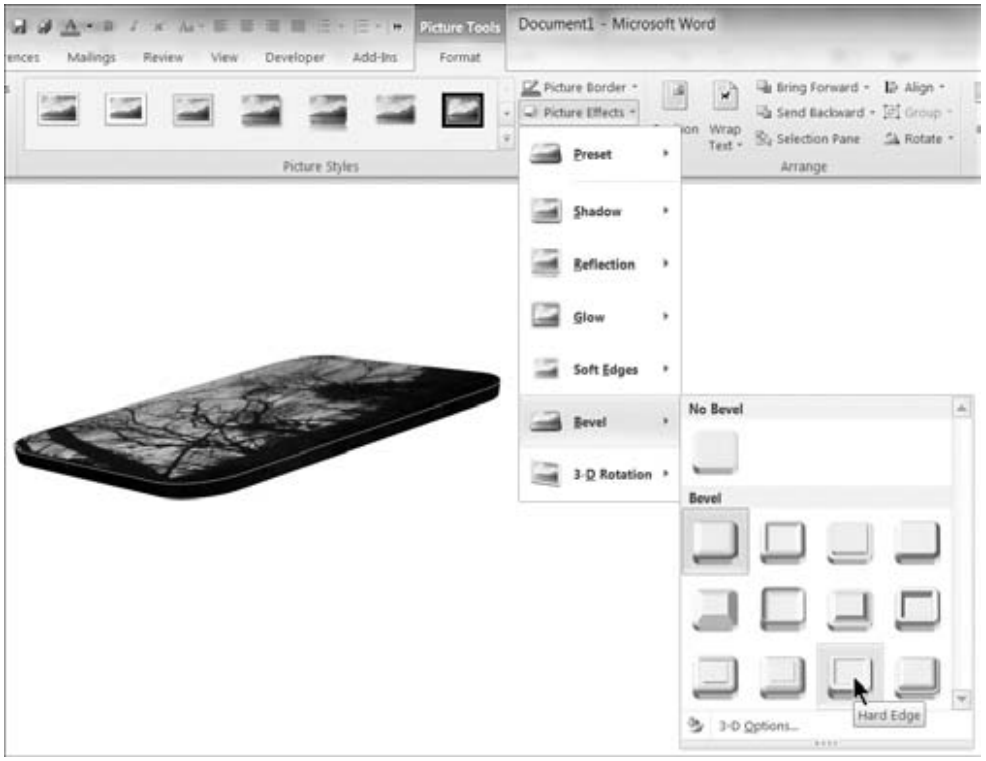


Picture Effects

Additional effects can be applied and refined with the Picture Effects tool, also contained in the Picture Styles group. There literally are millions of different permutations of effects you can apply, a small sampling of which is shown in Figure 18-14. Take a few years off to explore the different combinations.

FIGURE 18-14

Applying picture effects to different Picture Styles gallery effects produces myriad combinations.



Adjust

Word also features seven tools for adjusting picture attributes, shown in Figure 18-15. Use the tools to accomplish a number of common tasks:

- **Remove Background:** Lets you automatically/selectively remove portions of a picture based on color patterns. For example, this feature can remove everything from a picture

except for a single object, such as a flower or a car. This set of tools requires considerable practice to get the desired results, so I encourage you to practice with the tools provided in the Background Removal tab until you get the hang of it..

- **Corrections:** Sharpen, soften, and adjust the brightness of images for better printing or onscreen presentation (live preview).
- **Color:** Apply different color masks to achieve antiquing, sepia tone, grayscale, and a variety of other color effects (live preview).
- **Artistic Effects:** Provides 23 special effects, such as pencil sketch, blurring, charcoal sketch, paint strokes, and others (live preview)
- **Compress Pictures:** Reduce the size of the picture stored in the file to the minimum needed for a given application.
- **Change Picture:** Replace the picture with a different one. Picture Styles and Effects applied carry over to the replacement picture, as do changes applied with other tools in the Adjust group. Cropping and resizing, however, do not.
- **Reset Picture:** Removes formatting applied with Picture Styles, Picture Effects, and other Adjust tools (except for Change and Compress)

FIGURE 18-15

Word 2010 has seven tools for ''adjusting'' pictures.



Arranging Pictures on the Page

Word has additional tools for quickly controlling the position of pictures, both two-dimensionally on the document page and with respect to other objects in the graphical layer. In the Arrange group (see Figure 18-16), click Position. The In Line with Text option here is identical to the one listed under Wrap Text. The other options, however, aren't duplicated elsewhere.

Some pictures need to be in a particular location in order to make sense. In newsletters, brochures, and many other publications, however, some pictures are intended as general illustrations. Position on the page can be decided on the basis of aesthetics and balance rather than logic and the relationship between a given picture and a particular passage in the text.

More Layout Options invokes the Layout dialog box, shown in Figure 18-17. This replaces the Advanced Layout dialog box from Word 2007 and earlier, which had only two tabs.

FIGURE 18-16

Position gives you a live preview of nine fixed positions.

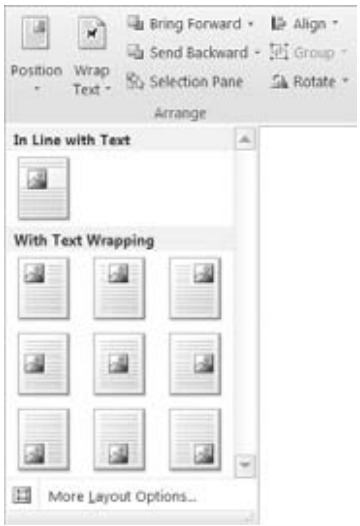
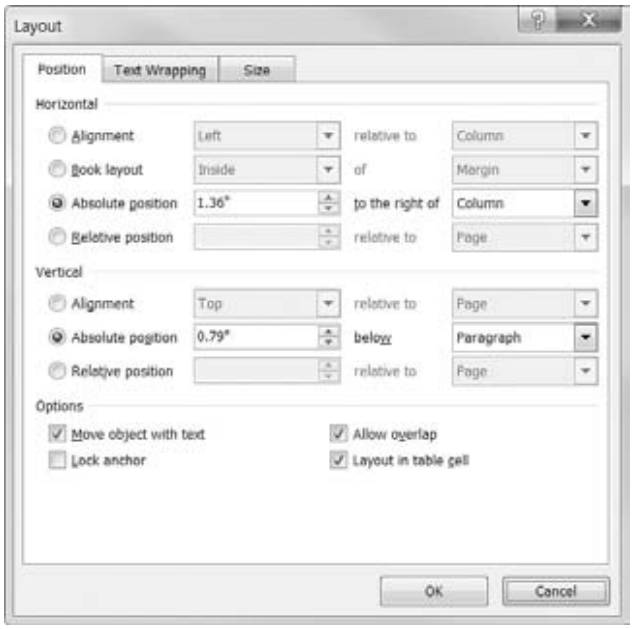


FIGURE 18-17

Layout enables you to precisely control and set the position of graphics on the page.



Additional options of interest include the following:

- **Move object with text:** Associates a picture with a particular paragraph so that the paragraph and the picture will always appear on the same page. This setting affects only vertical position on the page. Although Word will allow you to check this option and "Lock anchor" at the same time, once you click OK the "Move object with text" option is cleared.
- **Lock anchor:** This setting locks the picture's current position on the page. If you have trouble dragging a picture, verify that it is set to one of the floating wrapping options (anything but "In line with text"), and that "Lock anchor" is turned off. Pictures that have been positioned with any of the nine Position presets shown in Figure 18-16 will also resist dragging.
- **Allow overlap:** Use this setting to allow graphical objects to cover each other up. One use for this is to create a stack of photographs or other objects. This feature is also needed for layered drawings.
- **Layout in table cell:** This setting enables you to use tables for positioning graphics on the page.

Inserting Clip Art

Clip art provides another source of decoration for your documents, and is frequently used in newsletters and flyers. Part of Office's Shared Features set, depending on what Office program you have and how much of the Shared Features you have installed, Clip Art has hundreds or even thousands of little pieces of royalty-free art that you can use anywhere.

To insert clip art at the insertion point, click Insert ➪ Clip Art (in the Illustrations group). To accept the defaults, type a search term (for example, **cars**) and click Go, as shown in Figure 18-18. When clip art appears, scroll through the list. When you find something you want to use, click it to insert it into your document.

To control where the Clip Art pane searches, use the drop-down "Results should be," shown in Figure 18-19. To search only your local collection, remove the check next to "Include Office.com content." You can further control the scope of the search by limiting the search to only a particular kind of media. By default, Word searches for all media types — including videos and audio. Note also that we talked earlier about where to find photographs on the Web. Now you know another source. With "Results should be" set only to Photographs and with "Include Office.com content" enabled, you can quickly see a list of photographs available for download from Microsoft.

Note

As shown in "If Your Picture Format Isn't Supported," earlier in this chapter, if you lack local clip art, check Office 2010's Setup settings and verify that clip art was actually fully installed; check the group shown in Figure 18-20. To install all clip art that comes with Office 2010, click the dropdown arrow next to Clip Organizer, and choose "Run all from my computer." Or, you can selectively install individual components.

FIGURE 18-18

The Clip Art pane uses local clip art as well as clip art from Office Online.



FIGURE 18-19

Use the Search for drop-down list to control the scope of a search for clip art.

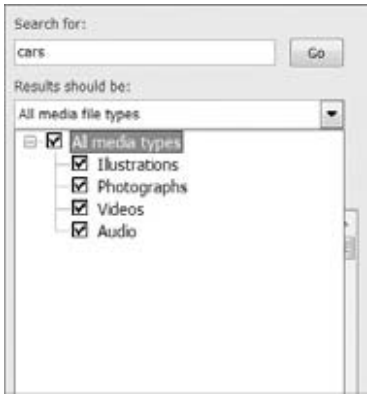
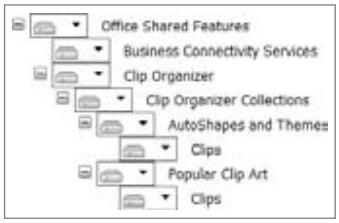


FIGURE 18-20

You can choose which components of the Clip Organizer to install



SmartArt

Thanks to SmartArt there's a cornucopia of professional graphics available for use in Word. If this book had color screen shots you would be dazzled by the kinds of sparkling, shiny, bubbly diagrams you can now make with Word. Best of all, although SmartArt is seemingly bottomless in its variety, the techniques are intuitive and simple to use.

SmartArt, introduced in Word 2007, replaced the Insert Diagram and Insert Organization Chart features of Word 2003 (and earlier). The legacy six-item Diagram Gallery (still available in Compatibility Mode) has been completely revamped and replaced with SmartArt. Moreover, the plain two-dimensional formatting has been replaced by 3-D formatting that's so slick it looks like something you'd find in the pages of a major magazine. Let's just hope that Word users have some excellent data and content to go with all this slickness.

Inserting SmartArt

To insert SmartArt, in the Insert ribbon tab, click SmartArt. As shown in Figure 18-21, there are eight categories, plus All, which enables you to peruse the entire gallery. Clicking a thumbnail preview in the middle panel displays a larger preview on the right. A description lists the intended use of the selected item. When you find something that looks appropriate, either double-click it or click it and then choose OK. Note that SmartArt is inserted like other graphics, such as pictures, and will use your default wrapping style. See "Wrapping" earlier in this chapter.

Word inserts the shape into your document with the text entry area ready to accept information, as shown in Figure 18-22. To enter text for the SmartArt diagram, click in the "Type your text here" box (the text pane) and start typing. As you type on the left, text is displayed in the corresponding SmartArt component on the right.

FIGURE 18-21

Word 2010 has more than 160 different SmartArt gallery items divided into eight different categories.

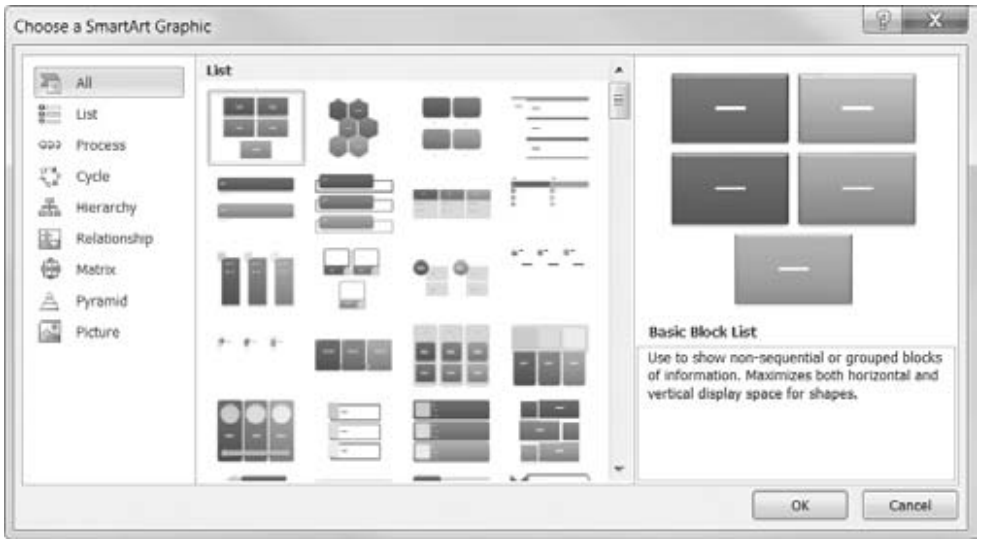
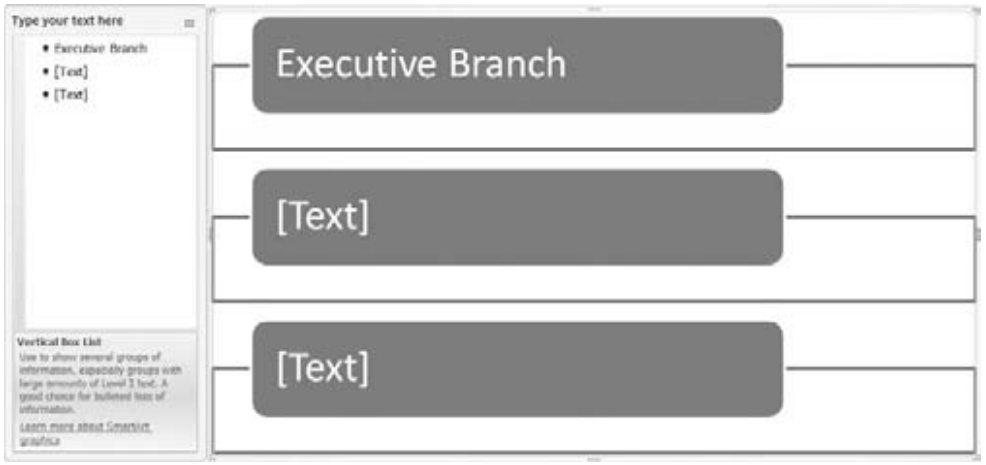


FIGURE 18-22

A SmartArt chart begins with the SmartArt Tools ➪ Design ribbon tab.



There are a variety of different ways to enter and format text. The following is not intended to be exhaustive; it's simply a list of things that work. Note that some actions can also be performed via the Create Graphic group in the SmartArt Tools ➪ Design ribbon tab, shown at the left in Figure 18-23.

- To move to the next item, press the down arrow. Use the other arrow keys to navigate in the text entry box as well.
- To add a new item to the list, press Enter, either at the end of the list of items or above an existing item.
- To demote the current item, press the tab key.
- To promote the current item, press Shift+Tab.
- To delete an item, select it and press the backspace key.
- To change the font for an item, select the text you want to change, mouse over the selection, and use the Mini Toolbar.
- The text pane can be moved and resized if it's in the way: Drag it to a more convenient location or drag any of the four sides to resize the text area.
- To dismiss the text pane, click the X. To redisplay the text pane, click either of the arrows at the left end of the diagram (see Figure 18-24).

FIGURE 18-23

The SmartArt Tools Design ribbon provides direct access to a number of useful tools.

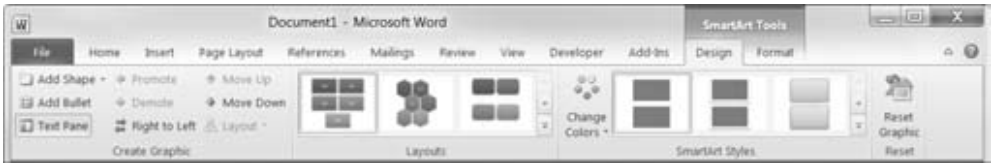


FIGURE 18-24

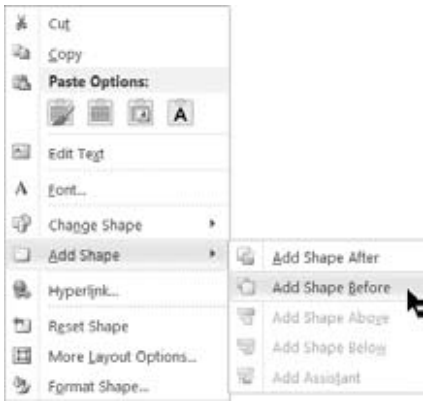
The text pane isn't the only means of entering text.



You can also enter text directly, without using the text pane. Click in the SmartArt item and type. Right-click the item to see a list of options, shown in Figure 18-25. To add a shape above the selected item, right-click and choose Add Shape ➪ Add Shape Before.

FIGURE 18-25

When working directly with the SmartArt item, right-click to see actions and formatting options.



Note that basic paragraph and character formatting can be applied to SmartArt shapes. Indents, bullets, and numbering cannot be, nor can styles. You can assign a style to the overall diagram; however, effects are limited unless the SmartArt item is In line with text.

To change the font used in all the text in a SmartArt object, display the text pane, click in it, press Ctrl+A to select the contents of the text area, and then right-click and set the desired font.

You're not limited to the shapes you start out with, nor must each item be the same shape. To change the shape of any given item, select the item, right-click it, choose Change Shape, and select an alternative. Keep in mind, however, that not every shape works for every type of diagram.

Tip

If you have a list — hierarchical or not — that you would like to convert into a SmartArt object, select the list and copy it to the clipboard before choosing the SmartArt tool. Once your SmartArt object appears, click in the text pane. Press Ctrl+A to select the placeholder list, and then press Ctrl+V to paste the list over the placeholder. ■

Changing Layout

You can change layout at any time. Select the SmartArt graphic and use the Layouts Gallery, shown in Figure 18-26, to choose a different layout. Note that the gallery provides a live preview. You aren't limited to applying the same class (List, Hierarchy, Process, Cycle, etc.). SmartArt will adapt the different designs using the relationship levels currently applied.

SmartArt Styles

SmartArt Styles apply a variety of preset formatting to your SmartArt diagrams — again, using live preview. As suggested by Figure 18-27, a great deal of care, thought, and artistry has gone into the design of SmartArt Quick Styles.

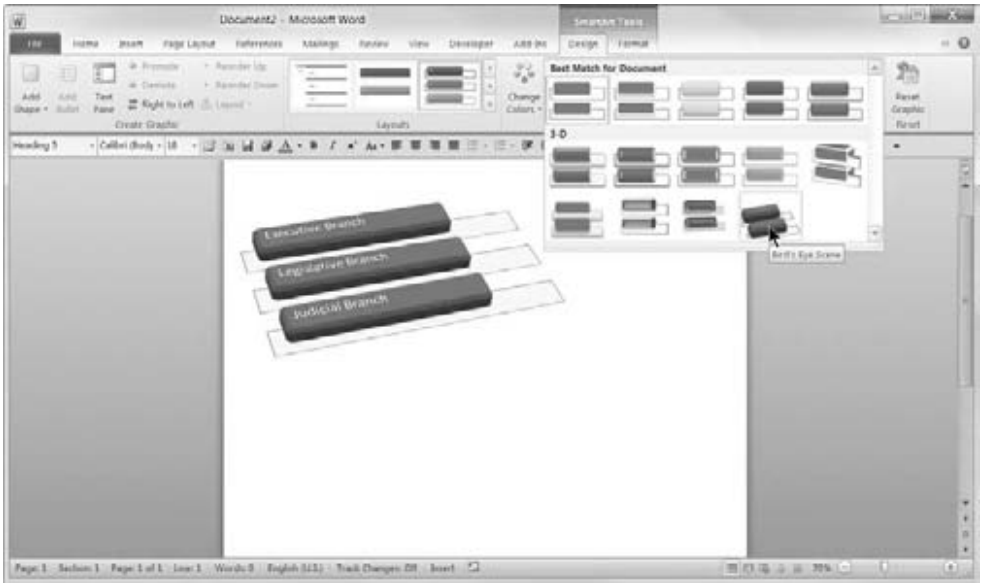
FIGURE 18-26

SmartArt will apply any layout to any hierarchical list.



FIGURE 18-27

The Quick Style Gallery puts a basic spin on your graphics; you can refine these further using the SmartArt Tools ➪ Format ribbon.



SmartArt Formatting

SmartArt provides a number of additional tools for further sculpting your diagrams. Shown in Figure 18-28, use the SmartArt Tools ➪ Format ribbon to add the finishing touches.

FIGURE 18-28

Formatting tools include Shapes, Shape Styles, and WordArt Styles.



Use the Format tools as follows:

Shapes

- **Edit in 2-D:** When you click a shape, a 2-D version appears for more direct editing.
- **Change Shape:** Change the selected shape into any of dozens of Word's shapes.
- **Make Larger or Smaller:** Expand or shrink the selected shape.

Shape Styles

- **Shape Style Gallery:** Choose from three dozen different patterns of outlines and fill.
- **Shape Fill:** Choose your own custom fill for the selected shape.
- **Shape Outline:** Choose a custom outline for the selected shape.
- **Shape Effects:** Choose from a variety of effects — shadow, reflection, glow, soft edges, bevel, and 3-D — to change individual shapes.
- **WordArt Styles:** Choose from a number of different filled-block lettering styles.

Summary

In this chapter you've learned how to insert pictures into Word documents and how to use Word's tools — new and old — to mold those pictures into art. You've also seen how to work with clip art, as well as how to create dynamic diagrams using SmartArt. You should now be able to do the following:

- Determine whether Word supports the graphic format of your pictures
- Reduce file size by compressing pictures in your documents
- Achieve any wrapping effect when working with text and graphics
- Convert an existing hierarchical text list into SmartArt

CHAPTER 19

Headers and Footers

Like that crazy aunt and uncle who live in Montana — or was it Idaho? — headers and footers are often misunderstood. Most folks think they know what they do and where they live, but they don't fully understand them. This chapter will remove the veil and give you the full truth about headers and footers in a way that not only puts you fully in the driver's seat, but helps you understand when something unexpected suddenly shows up.

Seemingly, headers and footers are the areas in the top and bottom margins of each page, but that's not the whole story. In Word, headers and footers are distinct layers in your document, usually behind the text area. They usually appear at the top or bottom of the page, respectively, but that's just a convention. Once you're in Word's header or footer layer, you can place text and graphics anywhere on the page. (See the "Side Margin Material" section later in this chapter for more information.)

This means that in addition to titles, page numbers, dates, and other essential bits of information, headers and footers are also ripe for containing things such as watermarks, side margin material, and even those full-bleed markers that are visible when you look at the edge of the pages of a closed book. (The concept is there; the actual implementation requires a type of printer most of us can't afford and don't need, or a paper cutter.)

A second area of misunderstanding concerns how headers and footers are inserted into your Word documents. They aren't inserted. They've been there right from the start. When you "insert" or "create" a header, you're really doing neither. Instead, you're merely using what was already there, but was previously empty or unused.

IN THIS CHAPTER

Understanding the header/footer layer

Header and footer navigation

Header and footer design

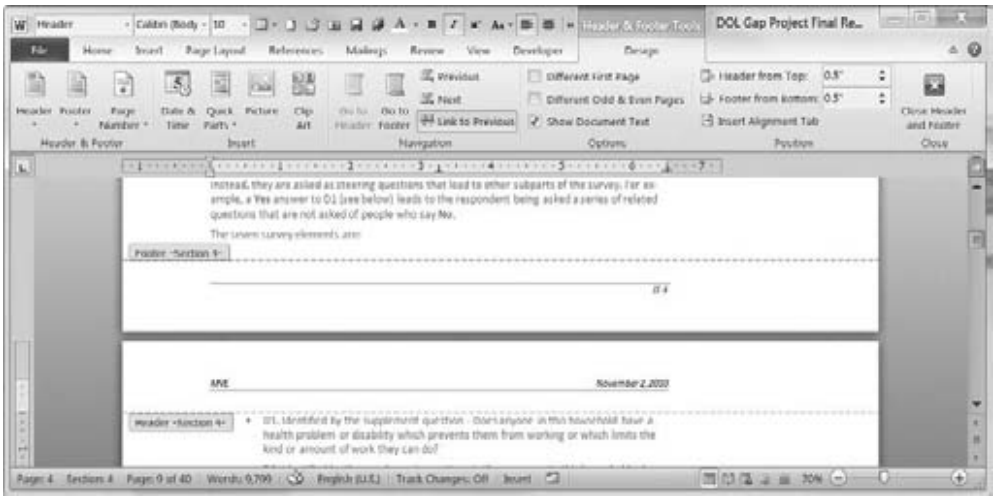
Page numbers

The Header and Footer Layer

When you're working in Print Layout view, any text in the header and footer layer usually shows up as grayish text at the top, bottom, or side of your document. To access those areas, double-click where you want to edit — even if you don't see any text there. This brings the header and footer areas to the surface, as shown in Figure 19-1.

FIGURE 19-1

Header and Footer tabs clarify what and where headers and footers are. With headers and footers open for editing, the document body text turns gray.



Headers and footers also display in Print Preview. There, however, because the view is supposed to represent what you'll see when the document is printed, the header and footer areas aren't gray and isolated. The same is true in Full Screen Reading view. Note that in Print Preview and Full Screen Reading view, you cannot perform normal editing — neither to normal text nor to text in headers and footers. In Full Screen Reading view, however, you can insert comments. This chapter assumes that you are working in Print Layout view, so that all kinds of editing are possible. If you don't see what's shown in the screen shots, then check your view setting.

Document Sections

Figure 19-1 indicates the document section number in the header and footer tabs at the left end of each area. Word documents can be single-section or multi-section. You might use multiple sections for a variety of reasons, particularly in long documents. Some users place each chapter of a document in a separate section, with additional sections being used for front matter (tables of contents, tables of figures, foreword, etc.) and back matter (index, glossary, etc.).

Section formatting enables you to use different kinds of numbering for different sections. It also allows different header and footer text in different sections. For example, the header or footer might include the name of each chapter, or the word *Index* or *Glossary*.

Section formatting is also used for other reasons that have nothing in particular to do with headers and footers. See Chapter 25 for more uses for section formatting.

Header and Footer Navigation and Design

Word provides a number of different tools that enable you to control the way headers and footers are displayed and formatted. In this section you'll learn what those are and where to find them in Word 2010.

Editing the Header and Footer Areas

The main set of controls is contained in the Header & Footer Tools Design ribbon, shown in Figure 19-2. To display the Design ribbon, double-click the header or footer area in a document. Or, from the Insert ribbon, choose Header ➪ Edit Header (or Footer ➪ Edit Footer). Once the header/footer layer is open for editing, either header or footer can be edited, as can items inserted into the side area (e.g., page numbers in the side margins), as well as watermarks.

FIGURE 19-2

The Header & Footer Tools ribbon provides complete control over headers and footers.



Notice the Go to Header and Go to Footer commands in the Navigation group in the ribbon. You can use those commands to quickly switch back and forth between the header and footer areas, but, as suggested by Figure 19-1, both areas are equally accessible. You do not need to click Go to Header or Go to Footer — you can simply click where you want to edit.

Note

While header and footer material can reside in the side margins, you cannot open the header or footer area for editing by double-clicking in the side margins. The double-click method for opening headers and footers works only in the top and bottom margin areas. ■

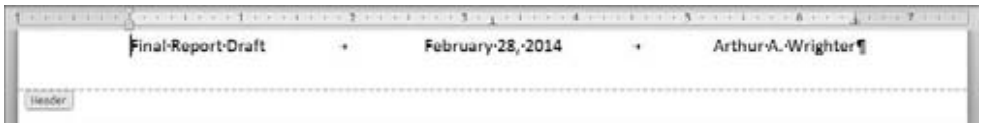
Header and Footer Styles

By default, Word's headers and footers use built-in paragraph styles named Header and Footer. Each is formatted with a center tab and a right-aligned tab to facilitate placement of text and other items. This enables you to have three distinct components, one each at the left, center, and right within the header or footer, without having to resort to using a table, textbox, or other device (although tables and textboxes are perfectly acceptable in headers and footers).

For example, to create a header with a left-adjusted document name, a centered date, and a right-adjusted author's name, you would enter the document name, press tab, enter the date, press tab, and finally type the author's name, as shown in Figure 19-3.

FIGURE 19-3

The default header style makes three-part headers easy.



Section Surfing

When editing the header/footer layer of a document, you can use the mouse or keyboard keys to navigate as needed. As long as you don't double-click in the text area of the document, the header and footer area remain open for business.

In a long document that contains many sections, however, scrolling can be tedious and imprecise. For greater control and precision you can use the Previous Section and Next Section tools in the Navigation section of the Header & Footer Tools Design ribbon.

Note

When the header and footer areas are open for editing, the Browse Object's Next Section and Previous Section buttons located at the base of the vertical scroll bar will not have the expected effects. Yes, they move you to the next and previous sections, but they also switch the focus back to the main text layer. ■

Inserting and Deleting Section Breaks

To insert a new section into a document, in the Page Layout ribbon click Breaks, and then choose one of the four section break options.

To delete a section break press Ctrl+Shift+* if necessary to toggle the display of nonprinting formatting characters, so that the section break is visible, as shown in Figure 19-4. Move the insertion point to just before the section break, hold down the shift key, and tap the right-arrow key. Then press enter. If this results in an extra empty paragraph, delete it. For more on section breaks, see Chapter 25.

FIGURE 19-4

When nonprinting formatting characters are displayed, you can easily identify a section break.



Link to Previous

Different document sections can contain different headers and footers. When Link to Previous is selected for any given header or footer, that header or footer is the same as that for the previous section. By default, when you add a new document section, its headers and footers inherit the header and footer settings of the previous section.

To unlink the currently selected header or footer from the header or footer in the previous section (which will allow the current section to maintain a distinct header or footer), click Link to Previous to toggle it off. Observe the difference between the upper and lower Link to Previous buttons shown in Figure 19-5. The lower button looks pushed-in, showing that Link to Previous is enabled.

FIGURE 19-5

Link to Previous is a toggle that can be turned on or off independently for the header and footer in each document section.



Note that headers and footers in any section have independent Link to Previous settings. While Link to Previous initially is turned on for all new sections that are created, when you turn it off for any given header, the corresponding footer remains linked to the previous footer. This gives you additional control over how document information is presented.

Different First Page

Most formal reports and indeed many other formal documents do not use page numbers on the first page. To keep users from having to make such documents multi-section documents, Word lets you set an exception for the first page of each document section. To enable this option for any given document section, display a header or footer in that section, and click the Different First Page option in the Options group of the Design ribbon (refer to Figure 19-2).

In a way, this is like a "Link to Previous" option that you can apply to different document sections. Unlike with Link to Previous, there is no telltale toggle tool to tell you the setting for the current section. Instead, there's a checkbox that indicates whether the option is turned on or off. As you navigate across different header and footer areas in a multi-section document, the checkmark appears or disappears to indicate the setting for the current section. Also unlike with the Link to Previous option, Different First Page cannot be different for header and footer. You cannot suppress just one. To accomplish that you would need distinct document sections (separated by a section break).

Different Odd & Even Pages

You can, without using section breaks, instruct Word to maintain different headers and footers on odd and even pages. This feature is often used in book/booklet printing, where the header/footer always appears closest to the outside edge of the paper — on the left for left-hand pages, and on the right for right-hand pages. This checkbox feature, also in the Options group in the Design ribbon, works in the same way as the Different First Page option and is set per section, not individually for each header and footer.

Show Document Text

Sometimes having document text showing is useful, and helps provide a frame of reference for headers and footers. At other times, however, it can be distracting and can make it harder to identify header and footer text, particularly if you're actually using gray fonts in the header or footer area. Displayed text also can make it difficult to access graphics that are stored in the header or footer layer.

By default, Show Document Text is enabled. To hide document text, click to remove the check next to Show Document Text in the Options group of the Design ribbon.

Distance from Edge of Paper

Headers and footers are printed in the margin area. The margin is the area between the edge of the paper and the edge of the text layer in the body of the document. If the header or footer is too "tall" for a given page, Word reduces the height of the text layer on the fly so that the header or footer can be printed. That is, it will be printed if the distance between the top of the header or the bottom of the footer and the respective edge of the paper is kosher with respect to the nonprintable areas of the paper.

Printers have a nonprintable area around the perimeter of the paper. This is an area in which it is mechanically impossible for a given printer to print. Windows' printer drivers do a good job of calculating the margin so that the printer does not try to print in the nonprintable region. When the margin is too small, Word will warn you.

Word does not warn you, however, if the header or footer extends too far into the margin. When this happens, all or part of the header or footer is cut off. Everything might look fine in Print Preview, and there is no warning, but part of the footer or header will be printed in the Twilight Zone.

You can rein the document in using the Header from Top and Footer from Bottom settings in the Header & Footer Design ribbon's Position group. If you find that the header or footer is being cut off, determine how much is being cut off and make that much additional allowance. For example, if .25 inches of text is being cut off of the footer, then increase Footer from Bottom by that amount.

Adding Header and Footer Material

You can put a variety of things into headers and footers, ranging from filenames and various other document properties (author, title, date last printed/modified, etc.) to page numbers and even watermarks. Inserting most text and graphics that will actually be printed in the top or bottom margin is straightforward. There are some special cases, however, such as page numbers, side margin matter, and background images and watermarks, that require special attention.

Page Numbers

A common use for headers and footers is to display page numbers. To include page numbers in Word 2010, several methods are available — some new as of Word 2007, and some "legacy." This section focuses mostly on the new ways because they provide extraordinary ease, flexibility, and variety not found in pre-ribbon Word (2003 and earlier). When the legacy ways are best, however, that's where we'll turn.

Insert Page Numbers

Inserting page numbers in Word has never been easier. First, decide where you want the page numbers to appear (top, bottom, or side margin). Then click anywhere on the first page in the document section where you want the number to appear. As noted earlier, documents can contain multiple sections, and each section can have independent headers and footers, which means they also can be numbered independently.

In the Insert ribbon's Header & Footer group, use the drop-down next to Page Number, as shown in Figure 19-6, and choose Top of Page, for example.

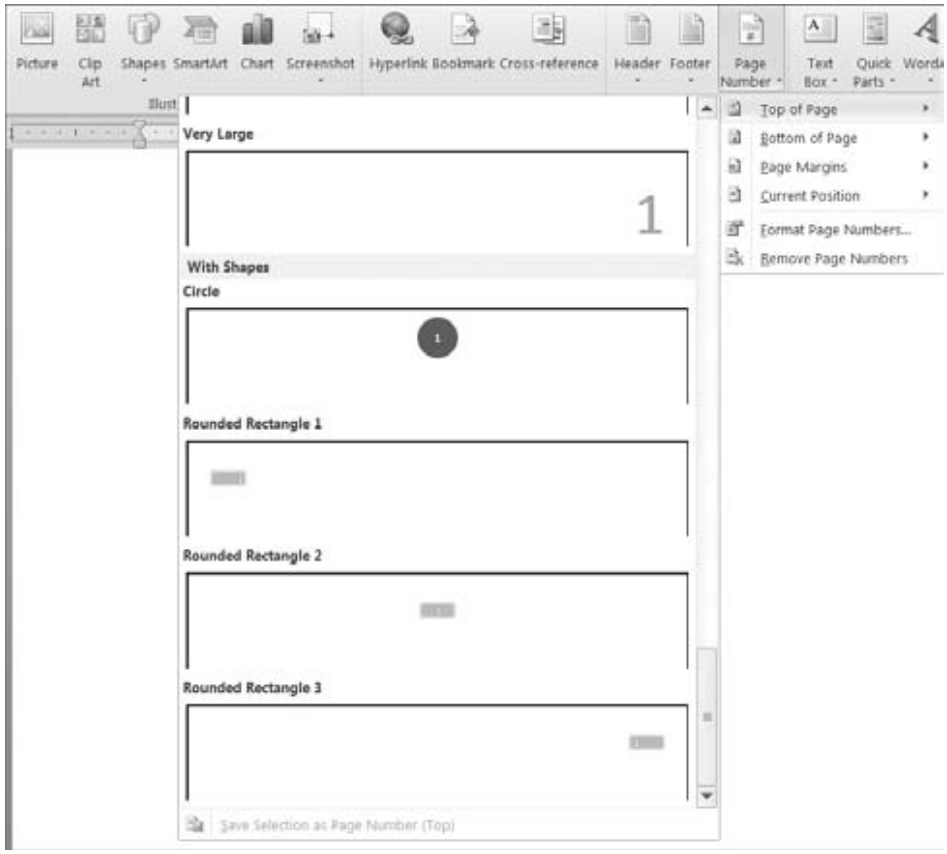
Select the option that corresponds to where you want the page number to appear:

- Top of Page
- Bottom of Page

- Page Margins (see "Where Do Page Margin Numbers Really Go?" a little later in this section)
- Current Position (use this option when the insertion point is already exactly where you want the page number to appear)

FIGURE 19-6

Word 2010 has extensive galleries with a variety of page number formats from which to choose.



The bottom of the page is the most common choice for word processing documents, but there are times when the top or side works better for a particular document. Select the desired destination. Word displays a number of preset page number options.

When you find a page number gallery item that suits your fancy, click it to insert the page number into the header or footer (according to which option you chose to get here). Note that you can also right-click the gallery item to see additional options, which are shown in Figure 19-7.

FIGURE 19-7

Right-click a page number gallery item for additional options.



To see the true nature of a page number gallery item, right-click it and choose Edit Properties. Page number items are really Building Blocks, which are discussed in Chapter 13.

Where Do Page Margin Numbers Really Go?

When you insert the page number in the page margin, Word 2010 inserts it into the header as a floating textbox to which a page field code was added. If you try to double-click that page number, nothing happens!

You can, however, use the Select Objects tool (in the Editing group in the Home ribbon, choose Select ➪ Select Objects), which can grasp any graphic.

Another way to bring the number into reach is to edit the header. In the Insert ribbon, choose Header ➪ Edit Header. You can now click the side page number and edit to your heart's content.

Deleting Page Numbers

To delete page numbers, move to the document section that contains the numbering you want to remove. In the Insert ribbon, click Page Numbers ➪ Remove Page Numbers.

Remove Page Numbers removes all page numbers from headers and footers in the current section — including those in the side margins. It does not remove page numbers from other document sections.

Formatting Page Numbers

You can choose the page numbering format before or after you insert a page number. On the Insert ribbon, choose Page Number ➪ Format Page Number, to display the Page Number Format dialog box, shown in Figure 19-8. Options are explained in Table 19-1.

Additional options that affect page numbers, such as whether headers or footers are displayed on the first page of a document or document section, are discussed earlier in this chapter, under "Different First Page."

FIGURE 19-8

Word provides flexible page numbering options.

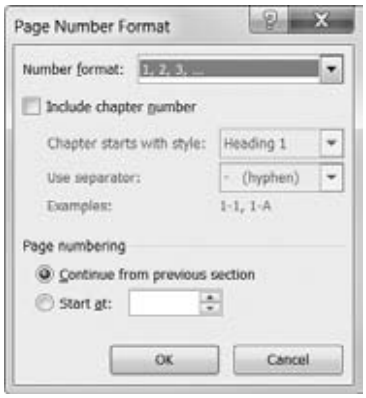


TABLE 19-1

Page Number Options

Option	Purpose
Number format	Specifies numbering scheme: 1, 2, 3; A, B, C; a, b, c; I, II, III; or i, ii, iii. Provides an additional option to bracket Arabic numbers with dashes (to bracket others, edit the header or footer directly.
Include chapter number	Applies a chapter numbering scheme such as I-1, II-5, III-43, where I, II, and III are chapter numbers, and chapters are formatted in a Heading 1 through Heading 9 style, with numbering included in the style definition.
Chapter starts with style	Available only if ''Include chapter number'' is enabled. For this option to work, chapter numbers must be formatted in a Heading 1 through Heading 9 style, and numbering must be included in the style.
Use separator	Specifies the separator to use between chapter and page numbers.
Continue from previous section	Indicates whether the current section's numbering is connected with that of the previous section. Use this option when distinct sections are being used for a reason other than to create distinct numbering, such as when switching sections to accommodate changes from portrait to landscape and back again.
Start at	Use this to specify a starting number other than 1.

Side Margin Material

Textual material inserted in the side margins of a document is inserted in either the header or footer layer. The "trick" is to use something like a non-inline textbox to serve as a container for the text. The easiest way to see this in action is to use an existing page number gallery item that inserts text into the side margin. For example, in the Insert ribbon tab, choose Page Number ➪ Page Margins ➪ Accent Bar, Right.

As shown in Figure 19-9, a floating textbox containing the page number has been inserted into the right margin. Notice that the Header tab is displayed, as well as a dotted line delineating the header area. This shows that the header/footer layer is open for editing.

FIGURE 19-9

Side margin material is accessed by editing the Header.



Instead of using a Page Number gallery item for inserting a textbox in the margin, you could do it manually. Double-click in the header or footer area, then use Insert ➪ Text Box ➪ Draw Text Box, and draw a textbox of the desired shape and size in either the left or right margin. Alternatively, there are a number of preset side margin items you can insert using the Building Blocks Organizer (Insert ➪ Quick Parts ➪ Building Blocks Organizer). For more about using building blocks and quick parts, see Chapter 13.

Summary

In this chapter you've learned what headers and footers are, what they're used for, how to use them, and how to navigate them. You should now be able to do the following:

- Create page numbers in your documents
- Edit headers and footers
- Set up different page numbering systems in different parts of a document
- Access side-margin material in the header/footer layer

CHAPTER 20

Symbols and Equations

It's not altogether clear why people distinguish between letters and numbers on the one hand, and symbols on the other. After all, letters and numbers *are* symbols. Be that as it may, we tend to use the word *symbol* to refer to a disjointed collection of characters. If they have anything in common, it is perhaps that we don't usually know them by name. We can type various symbols and people will know what they are and how they're used, but they won't necessarily know what they're called. After all, they're symbols, and sometimes a tiny ideograph, wingding, webding, or whatever you might call it is sufficiently eloquent without a name.

This chapter includes two ways of looking at symbols. The first part looks at them individually, and at how you go about locating the symbol you're looking for and inserting it into your documents.

The second part looks at a special way of using symbols to represent often complex concepts in mathematics, statistics, engineering, and other quantitative fields. In short, we look at Microsoft Word 2010's equation editor. Introduced in Word 2007, it replaced Microsoft Equation Editor 3, and makes you hope you'll never have to look back. If you do have to look back, though, Word still lets you edit legacy equations, but it will not convert them into the newer type.

IN THIS CHAPTER

Inserting symbols and special characters

Inserting built-in gallery equations

Creating equations

Understanding equation editing

Working with equations

Equation numbering

Word 2003 equations in Word 2007

Symbols

To insert a common symbol, click Symbol on the Insert ribbon. If the symbol you seek is shown in the symbols palette, click it to insert it into your document. If Microsoft has divined correctly about which symbols are needed most often, you might never need venture further than the palette.

The very first time you access the Symbol tool, the palette contains 20 commonly used symbols for quick access, as shown in Figure 20-1. Each time you use the tool to insert a symbol, that symbol moves to the first position in the palette the next time you use the Symbol tool. Once you've inserted 20 distinct characters using the Symbol tool, the palette is fully personalized and effectively becomes the "recently used symbols list." You'll see a different form of the recently used symbols list shortly.

FIGURE 20-1

The symbols palette provides quick access to the 20 most recently used symbols.



Symbols Dialog Box

If you don't see the symbol you seek, click More Symbols at the bottom of the palette. (No, the symbol next to it isn't a good-luck horseshoe. Besides, it's upside down.) More Symbols displays the Symbols tab of the Symbol dialog box.

Symbols Tab

The Symbols tab is shown in Figure 20-2. Elements used in this dialog box are shown in Table 20-1.

FIGURE 20-2

The Symbol dialog box's ''Recently used symbols'' list contains the same characters as the palette.

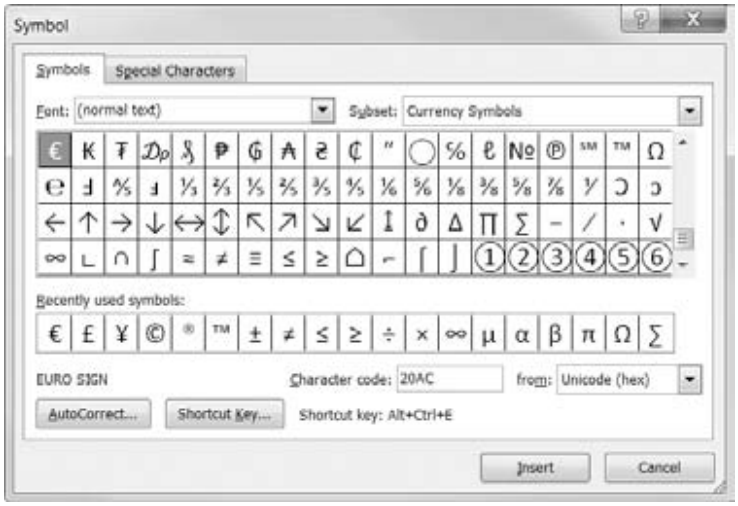


TABLE 20-1

Symbol Dialog

Font	Drop-down list of all of the fonts installed on your computer. The (normal text) entry shows characters available in the default character font.
Subset	Subset displays only if ''from'' in the lower right part of the dialog box is set to Unicode and only if the selected font is a Unicode font.
Character set	The character set is a scrollable pane that displays all the characters available for the listed font. If from: is set to Unicode, then Subset is displayed, and the focus changes to reflect the selected subset.
Recently used symbols	The ''Recently used symbols'' list contains just that, with the most recent listed first. If your monitor is wide enough, this list can display the 36 most recently used symbols.
Character code	The character code for the selected character using the displayed ''from'' numbering system.
from:	Character system (ASCII and Unicode). ASCII is the traditional 256-character DOS system. Unicode was designed to provide consistent and uniform computer support for all writing systems.
AutoCorrect	Use AutoCorrect to assign mnemonic shortcuts for specific symbols. See Chapter 14 for more about AutoCorrect.
Shortcut Key	Use Shortcut Key to assign keyboard shortcuts for specific symbols. See Chapter 45.

Note that the Symbol dialog box is non-modal, which means that you can move freely between it and the text of your document. This can be handy if you have several characters to enter in different places. Word's Symbols list is similar in concept to Windows' Character Map applet (All Programs/Program ➪ Accessories ➪ System Tools).

Tip

The Symbol dialog box's non-modality can be handy, but the process of inserting symbols is still rather ergonomically impoverished. It's sometimes easier to insert the characters needed in one place in your document and copy them individually to the clipboard, thereafter using the clipboard to insert the characters (up to 24) as needed. ■

Using the Symbol Dialog Box to Find a Character's Code

Most Word users don't know that the Symbol dialog box is capable of two-way communication. Not only can you use it to insert characters whose character codes you know, you can also use it to learn character codes you don't know. Sometimes it can even give you a way to guess what language a character comes from.

Suppose you come across a character or word you don't recognize in a document. Select the character and click Symbol ➪ More Symbols from the Insert ribbon. The selected character will now be highlighted in the Symbols tab of the Symbol dialog box. This works for any character. Its name is also displayed at the bottom left of the dialog box.

Unfortunately, while the Symbol dialog box's non-modality often helps when you want to go back and forth between the document and the dialog box, it doesn't help in this situation. To discover another character, dismiss the dialog box, select the character, and choose Symbol ➪ More Symbols again. If you have to do this a lot, you might consider adding More Symbols to the QAT (right-click More Symbols and choose Add to Quick Access Toolbar).

Special Characters Tab

The other major feature of the Symbol dialog box is the Special Characters tab. Shown in Figure 20-3, this tab displays 20 characters often needed by Word, their uses, and their respective current shortcut key assignments. Why "current"? The assignments shown aren't necessarily Word's built-in defaults — if you change an assignment, then your assignment will be shown. When you need these characters, using this dialog box is a good way to refresh your memory about how to type them.

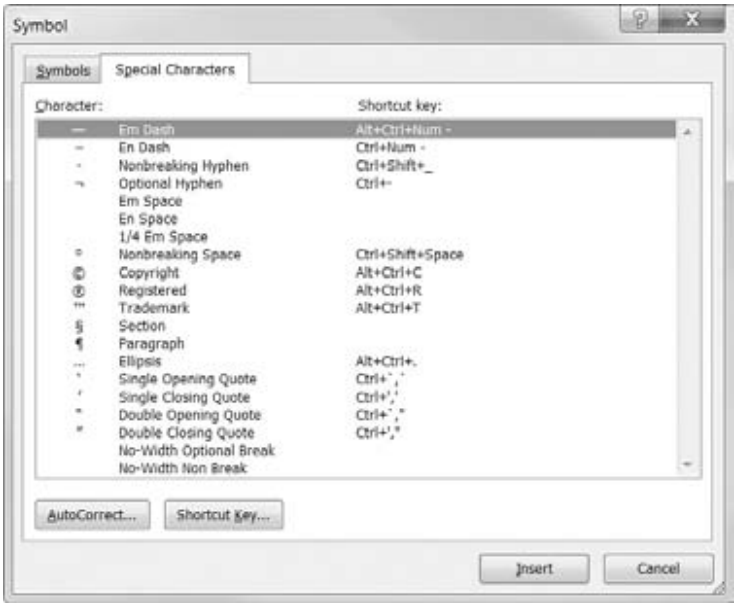
Equations

To access the equation feature in Word 2010, click the arrow next to Equation in the Insert ribbon. As shown in Figure 20-4, the Equation button is a two-parter. Clicking Equation itself

sends you directly into Equation Design mode, which we'll talk about a little later. Clicking the arrow, however, displays the Equation Gallery and additional options. Clicking Insert New Equation also sends you into Equation Design mode.

FIGURE 20-3

The Special Characters tab shows 20 frequently needed characters, along with their current shortcut assignments, if any.



Inserting Equations from the Gallery

Use the vertical scroll bar in the gallery to display additional equations. If you see what you want, click it to insert it at the current insertion point in the document. If you insert it into an otherwise empty paragraph, the equation defaults to appearing in Display mode; if the equation is on the same line as text, it appears in Inline mode. Both are shown in Figure 20-5. In Inline mode, you can surround the equation with other text, as is done at the top of Figure 20-5. In Display mode, the equations appear by themselves, away from the document's normal text.

Note

In Display mode, you can center a group of equations so that each one is centered or you can center them as a group. In the latter case, the longest equation is centered, and the others are left-aligned with it. Use this type of centering when you need to line up coefficients for easier visual comparison. Centering as a group works only when the equations are separated by the newline (Shift+Insert) character instead of by paragraph markers. ■

FIGURE 20-4

The Equation Gallery features a number of commonly used equations.



Creating an Equation from Scratch

To write your own equation, click the main Equation tool on the Insert ribbon, or simply press Alt+=. Word opens the Equation Tools Design ribbon, shown in Figure 20-6. Anything that doesn't require special symbols or structures can simply be typed. In fact, if you don't need anything special, forget about the equation editor and just type it. There's no reason why $a^2 + b^2 = c^2$ can't simply be typed.

Tip

When you're writing and editing equations, it's sometimes hard to detect nuances at the default zoom. Try zooming up to 150% or even 200% to make the details easier to see. ■

FIGURE 20-5

Equations can be shown inline with text or in Display mode; in Display mode, they can be centered individually or as a group.

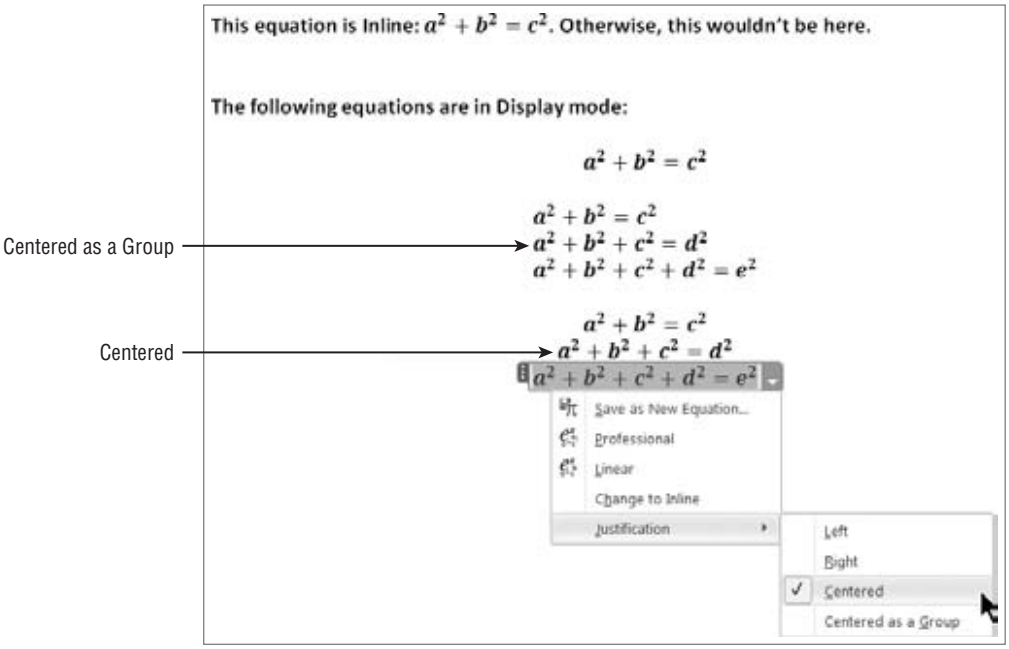


FIGURE 20-6

Use a combination of typing, tools, symbols, and structures to create equations in Word.



If you want to insert another related equation, press Shift+Enter and continue typing. This ensures your ability to use the Centered as a Group formatting shown in Figure 20-5.

Saving Equations to the Gallery

When you modify the built-in equations or create your own, you can save them to the gallery for future use. If you include an automatic numbering solution such as the one described in the last section of this chapter, you can include the equation plus any formatting. That way, when you add the equation to your document, you won't have to go through any extra numbering steps.

To add an equation to the gallery, select it. Make sure you include any extra elements that play a role in positioning it, such as tabs, paragraph markers, or any other formatting. From the Insert ribbon, click the drop-down arrow next to Equation, and choose Save Selection to Equation Gallery. The selected equation will be appended to the end of the gallery, and available the next time you're feeling especially mathematical.

Working with Equations

While working with equations is largely intuitive and a matter of getting a feel for the process, some things proceed a bit more easily with a few hints and tips.

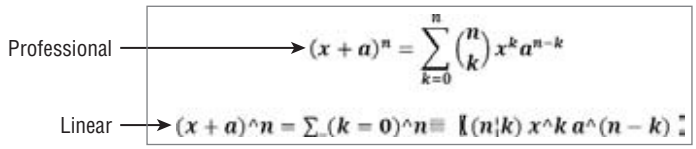
Take a quick tour of the equation tools, especially the structures. While many are logical and possibly obvious based on the diagrams and names (assuming you're already familiar with the underlying mathematical concepts and terms), they will seem even more so once you've perused the possibilities. If you need anything highly specialized, verify that it's actually possible with Word's tools. It would be a shame to spend 10 minutes working on an equation only to discover that a lesser-known structure isn't there. Best to discover that up front.

Linear versus Professional

You might not find a lot of agreement about the appropriateness of the two terms, but Word provides two ways to present equations: Professional and Linear, shown in Figure 20-7. Word defaults to Professional (of course), but if you ever need Linear, it's yours with the click of a mouse. Select the equation(s) you want to change, and click the appropriate tool near the left end of the Equation Tools Design ribbon (refer to Figure 20-6).

FIGURE 20-7

Word offers a choice between Professional (top) and Linear (bottom) equation presentation.



Linear mode also enables you to directly modify the structures. Suppose you need a four-by-four matrix, instead of the maximum three-by-three provided. Go ahead and insert a three-by-three, then switch to Linear view. Replace `(&&@&&@&&)` with `(&&&@&&&@&&&@&&&)`. Now switch back to Professional mode, and presto! A little experimentation will show you the myriad possibilities.

Math AutoCorrect

Some things can be done in more than one way. For example, if you need *ln x,* there's no need to reach for the mouse. Type **ln** and press the spacebar. Poof! The structure for typing the variable whose natural log you're trying to represent suddenly appears.

This happens courtesy of Math AutoCorrect. Choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options, and click the Math AutoCorrect tab. Click the Recognized Functions button, and drag it a little to the side so you can see what's here.

As shown in Figure 20-8, the Replace/With list provides a long list of ways to insert various symbols and structures. However, you won't find *ln* there. Instead, it and a lot of other functions are in the Recognized Math Functions list. The explanation provided in the top of the latter dialog box doesn't do the feature justice. It doesn't simply fail to italicize. When you type the name of a function, it automatically adds the needed structure as well!

FIGURE 20-8

Math AutoCorrect simplifies and speeds work with the equation editor.



Add Your Own Math AutoCorrect Entries

A few structures already have their own AutoCorrect entries. Some others don't. If you're a statistician, you probably have frequent need for a large sigma with room for the upper, lower, and following elements, such as the one shown in Figure 20-9. In fact, you probably need it with the *n* and *i=1* a lot more often than any other way, so save yourself some time by creating an AutoCorrect entry for it.

Create a structure to serve as a shell for equation parts you'll need. Include all the elements you typically need. Then, inside the equation container, select just the structure (not the whole container). Summon the Math AutoCorrect dialog box using whatever method you like (for example, the QAT shortcut you created in Chapter 14). The With box displays your sigma, although the top, bottom, and side structures don't display. Type your Replace text (sig3 might be a suitable name in this case, as it's a sigma with three components), and click Add ➪ OK. Now delete the structure you created and try out the AutoCorrect entry. Type **sig3** (or your own Replace name) and press the spacebar. That crestfallen look on your face says you simply got the sigma without the three structures. Press the spacebar again! Presto! Now, each time you need that structure, rather than reaching for the mouse, type your shortcut and press the spacebar twice.

FIGURE 20-9

Save time and effort by creating your own Math AutoCorrect entries.



Inserting Text Before or After an Equation

To insert text before or after the equation, press the left or right arrow so that the container disappears, and then type. If you want to retain the equation's initial formatting you have several options. You can apply centered paragraph formatting, which won't necessarily give you identical results if you have a group of equations (see Figure 20-5 and the associated discussion). Or you can add your normal text inside the equation container itself, as described in the following section.

Inserting Normal Text Inside an Equation Container

To add normal text inside the equation container, click in the container where you want the text to begin. Near the left end of the Equation Tools Design ribbon, click Normal Text and start typing. The equation now maintains its formatting. Any text you add will be included if you now save the modified equation as a new gallery item. See "Saving Equations to the Gallery" later in the chapter.

Tip

To get a running start, if you have part of an equation already typed in your document, select it, and then click Equation on the Insert ribbon. Word inserts what you typed into the equation container as normal

text. Note that Word won't convert subscripts and superscripts into their respective counterparts, so don't waste time doing that outside the structure. However, Word will convert basic A=B+C+D statements. ■

Working with Structures

You have two general options with respect to equation structures. Suppose that you want to create the equation shown in Figure 20-10. One way to proceed is to begin typing and then choose structures as you need them. For example, type **S=**, and then click the Large Operator structure, as shown in Figure 20-11.

FIGURE 20-10

Word's equation editor's equations are so slick, you'll think they came out of a stats book!

$$S = \sum_{i=1}^{n} (u_i^2) = \sum_{i=1}^{n} (y_i - a - bX_i - cZ_i)^2$$

Look through the structures shown to find the one you're looking for. Note that some might appear quite similar but are actually different, so you'll need to look carefully. For example, can you quickly spot the difference between the summation sign that's selected and the one to its immediate right? The selected one has boxes at the top and bottom to indicate the iteration counter and limit. The one to the right has boxes above and below, but shifted to the right, for superscript and subscript.

A second way to proceed is to type the main equation, omitting subscripts, superscripts, and structures. Then use the Structures group to add the structures. If you get tired of constantly moving between the ribbon and the keyboard, this can save some effort.

Tip

To cut down on movement, scroll the screen so that the equations you're working on are at the top, and close to the ribbon. ■

Contextual Tools

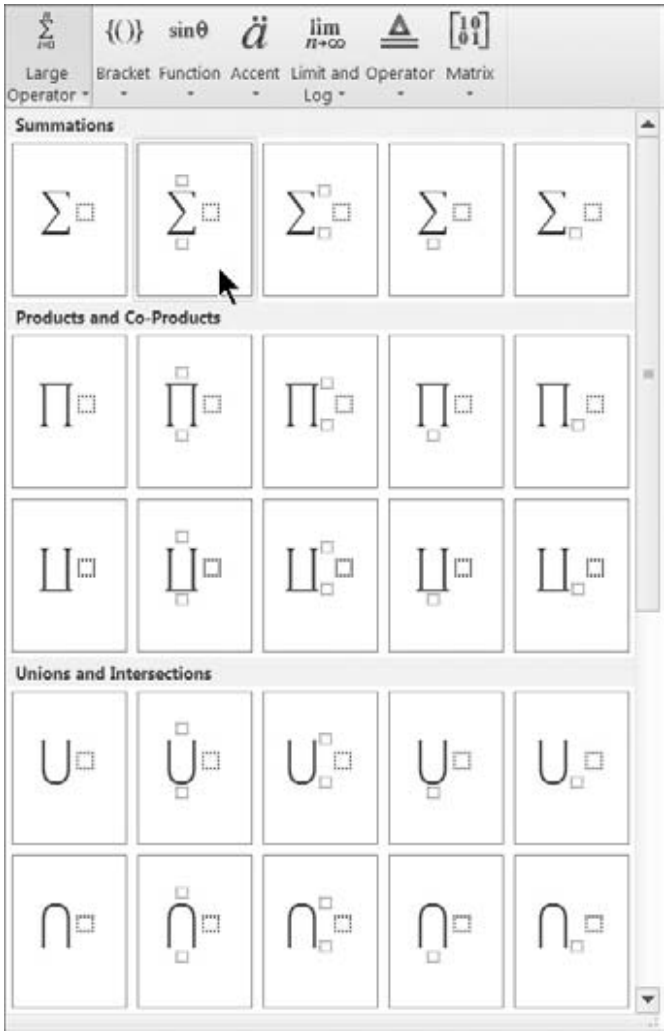
When you're editing equations, Word provides additional contextual tools that some users overlook. At any location in the equation, right-click to see the options. A sampling of the different context menus you might see is shown in Figure 20-12.

Tip

I already showed you a direct way to expand a matrix structure. Another way is to use the matrix's context menu. Insert the three-by-three matrix that's provided. Select it and right-click it, and choose Insert ➪ Insert Row Before (or After), or Insert Column Before (or After) until the matrix is the size you need. ■

FIGURE 20-11

The Large Operator tool shows you the different combinations available.

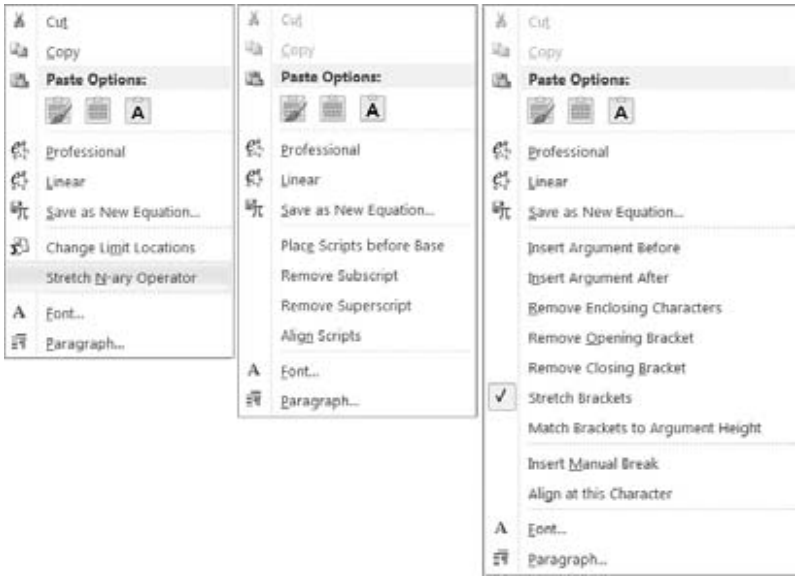


Equation Options

A number of equation options are not set in concrete. To access the Equation Options dialog box, shown in Figure 20-13, click the Equation Options launcher in the southeast corner of the Tools group in the Equation Tools Design ribbon.

FIGURE 20-12

Right-click in an equation to see context-sensitive options and actions.



Numbering Equations

Many people who work with equations need them numbered. Several approaches can be used in Word, none of them fully satisfactory. Word 2010 does not have a built-in way to number equations. Note that the caption feature (References ribbon, Insert Caption ➪ AutoCaption) provides for numbering legacy Microsoft Equation Editor 3.*x* equations, but not for numbering Word 2007/2010's native equations.

While there are several ways to number equations, let's just look at one, which is probably the best way because it's flexible and hard to break. It uses the sequence field code. We'll be looking at fields in detail in Chapter 21. For now, however, let's look at one field in particular: the SEQ field.

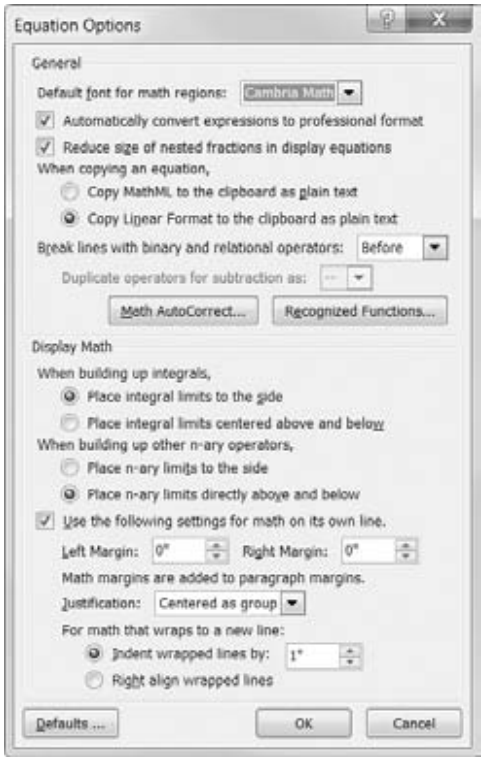
The SEQ field is used for creating sequence numbers. The field code {SEQ *name*} creates a sequence number in your document. You can name it anything, such as Fred, Darlene, or succotash, but consider naming it equation. Note that this is just a convenient name, and doesn't in any way associate it with equations except in your mind. If you wanted to be willful, for example, you could use {SEQ EQUATION} to number the tables in your document.

In any event, if you include the field code {SEQ EQUATION} inside (or adjacent to) the equation container, it will number your equations. What if you have multiple sets or groups of equations that need to be independently numbered? Well, there's {SEQ EQUATION1} for the

first set, {SEQ EQUATION2} for the second, {SEQ SUCCOTASH} for the third, and, well, you get the point.

FIGURE 20-13

Use Equation Options to control the way equations are created and inserted.



To use SEQ fields to number equations, you will want to reset each equation to be numbered so that it's Inline rather than Display mode. This will enable you to use Word formatting to correctly position the equations and numbers.

A Semiautomatic Way to Number Equations

A common way to number equations in a formal presentation is to center the equations themselves and to right-align parenthetical numbers at the right margin. Armed with this knowledge, let's create a style to use for formatting equations, and an AutoText entry to add the necessary numbering component. To create the style:

1. Display the horizontal ruler line (if it's not already showing) by clicking the View Ruler tool at the top of the vertical scroll bar, and observe the right margin setting (and mentally divide it by two for use in Step 3). Click in an empty paragraph, and then double-click the bottom of the ruler line: This stirs the Tab dialog box to life.

2. Click Clear All to remove any unneeded tab stops.
3. In Tab stop position, type the location of the midway point (often 3.25″), click Center, and then click Set.
4. In Tab stop position, type the location of the right margin (often 6.5″), click Right, and then click Set. Click OK to close the dialog box.
5. Assign a style name. Press Ctrl+Shift+S to summon the Apply Styles dialog box. Type a name for the equation style (Equation Num isn't already taken), and press Enter to apply it to the current paragraph. Dismiss the Apply Styles dialog box.

With the insertion point still in that empty paragraph (now formatted as Equation Num), create the AutoText entry:

1. Press Ctrl+Tab to insert a tab, and then type **()**.
2. Put the insertion point inside the parentheses, and press Ctrl+F9 to insert field braces.
3. Inside the field braces, type **seq equation** and press F9 to update the field. If necessary, press Ctrl+Shift+8 to toggle the display of tabs and paragraph marks so that you can see them.
4. Select the entire line, including the tab, the (1), and the paragraph mark at the end of the line. Choose Insert ➪ Quick Parts ➪ "Save selection to Quick Parts gallery."
5. Replace the suggested name with something you can remember, such as eqnum. Set Gallery to AutoText. Set a category and type a description if desired. Leave Options set to Insert Content Only, and then click OK.

You can delete that line now that it's stored as an AutoText item. Now you're ready to number those equations! To do so:

1. Click the arrow at the right end of the equation; if necessary, click Change to Inline.
2. At the beginning of the line (outside the equation container), press Ctrl+Tab.
3. At the end of the line (outside the equation container) type **eqnum** (or whatever name you used in Step 5 earlier), and press F3.

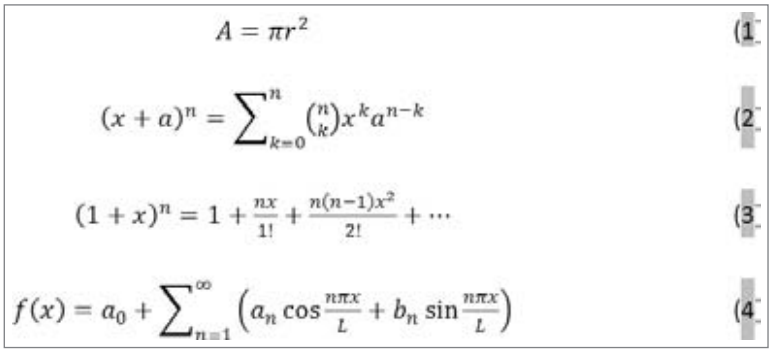
You now should have a numbered equation. If you did everything according to the steps, you should have something that produces numbering like that shown in Figure 20-14. Note that the numbers are shaded because they are field codes. If you insert or remove equations, you might need to select the whole group and press F9 to update the numbering.

Tip

Just in case you haven't already thought of this, you can create an empty but already formatted and ready-to-go numbered equation "shell," and add it to the Equation Gallery. Set up an equation as shown for numbering, but replace the actual equation with a new ready-to-be-written equation container. Save that to the gallery, perhaps calling it New Numbered Equation. As you explore this new feature in Word, keep in mind the capability to save your work for future use. You undoubtedly will discover other tricks that make creating and using equations easier. ■

FIGURE 20-14

Use a formatted AutoText entry that contains a sequence numbering field to semiautomatically number equations.



Legacy Equations

If you have documents from Word 2003 and earlier, you will still be able to edit any equations they contain, but not using Word's newer equation tools. Instead, Word 2010 comes with Microsoft Equation Editor 3.1. There is no built-in way to convert Microsoft Equation Editor 3.1 equations into Word 2010 equations. To edit a legacy equation in Word 2010, double-click it.

When going the other way — from `.docx` to `.doc` — if you copy and paste a Word 2010 equation into Word 2003, it will become a picture.

If you have to create a legacy-type equation using Word 2010, whether in compatibility mode or not, in the Insert ribbon, choose Object ➪ Object ➪ Create New tab ➪ Microsoft Equation 3.0 ➪ OK. This object will be editable by Word 2003. And even though it says Equation 3.0, it's really 3.1. But who's counting?

Summary

In this chapter you've explored symbols individually and as used in equation editing. You've learned how to insert any of the built-in equations, as well as how to save your own creations to the gallery. You should now be able to do the following:

- Insert symbols
- Determine an unknown character's character code and font subset
- Create and edit equations with Word 2010
- Edit legacy equations from earlier versions of Word
- Set up a semiautomatic equation numbering solution

CHAPTER

21

Field Guide

You've seen fields several times in this book, but they've usually been mentioned only in passing. They've been used to insert dates and page numbers, to number equations, and a few other things. So far, however, we haven't looked at them head-on in their radiant splendor, or under a magnifying glass.

A number of tasks that required fields in Word 2003 and earlier can now be performed more efficiently and elegantly with content controls (contained in the Controls section of the Developer tab; see Chapter 44). If you work with complex documents in compatibility mode, you are much more likely to encounter fields than when working in the `.docx` format.

Moreover, a number of linking tasks that require the use of fields in a compatibility-mode document can be performed in ways that are more robust (harder to break) in the XML-based Word `.docx` format, so when you insert links you're less likely to see field codes than before. Instead, much is done behind the scenes with XML technology.

Yet some Word 2010 features — dates, page numbers, mail merge, tables of contents, indexes, and some others — still do rely on fields, so fields aren't ready for the archeologists quite yet.

A number of Word features that depend on fields are covered in other parts of this book. This chapter's mission is not to redundantly cover those other features. Rather, it is to provide a strong background and foundation that helps you thoroughly understand the relationship between fields and specific features. Equipped with this information, you'll be in a solid position to take advantage of the power of fields when needed, to choose between legacy and newer approaches when the option presents itself, and to deal with the occasional riddles and gremlins that inevitably creep in. Thus prepared, you will be able to tame those demons and solve those mysteries.

IN THIS CHAPTER

Understanding field codes

Field basics

The Field dialog box

Field keys

Field syntax

Field categories

And Field Codes Are . . . ?

Field codes are special sets of instructions in Word documents. They sometimes tell Word to display the current date, the number of pages in a document or a document section, an index, a table of contents, the contents of all or of part of a linked document, or the filename and folder where the current document is stored. Field instructions (called *switches*) also tell Word how to display that information.

Most fields are updateable. When the source information in a field displays changes, you can update the field and display the latest information. This enables you to turn documents into more dynamic information containers, rather than static documents that always contain the same information. To update a field, click it and press F9. Other update methods are available as well, as you will see later in this chapter.

Fields can be formatted. You can apply font, paragraph, and other formatting to field results so that they blend in with your document. Sometimes you don't even know information is in a field code until you look more carefully. As you will see, however, for the person working on the document, knowing that something is a field is critically important.

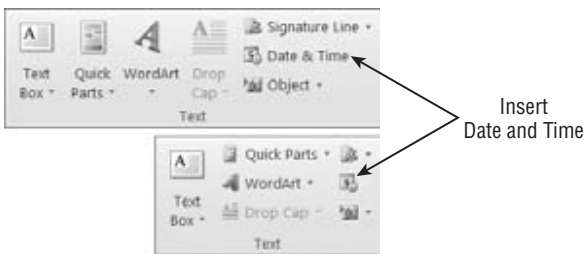
Many fields can be unlinked easily and turned into permanent content that doesn't change. This enables you to create a snapshot, rather than dynamic content. This means that you can use the convenience of a field to insert today's date, but then lock that date in so that when you look at a letter years from now it will have the original date, rather than some date in 2018. That way you'll know when the letter was written, but if you repurpose a copy of that letter, you can unlock the date field so it can be updated.

Basic Field Study

As suggested earlier, sometimes fields are inserted automatically as part of some other process, such that you aren't even specifically aware that fields are involved. For example, in the Insert ribbon's Text group, click the Insert Date and Time field, as shown in Figure 21-1.

FIGURE 21-1

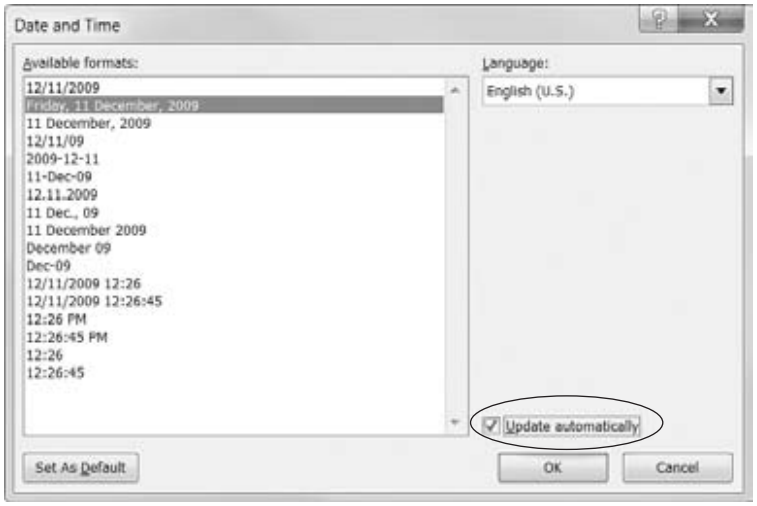
Ribbon components can appear different depending on screen resolution and monitor size.



In response, the Date and Time dialog box springs to life. If you choose a format and click OK, you'll get just the date and/or time in the format selected, and not a field. If you enable the Update automatically option indicated in Figure 21-2, however, Word instead inserts a DATE field.

FIGURE 21-2

Update automatically instructs Word to insert a DATE field code instead of just the date and time.



Updating Fields

The word *update* has been used several times because it's impossible to talk about fields otherwise. Updating a field simply means forcing Word to reevaluate that field in light of any changes that might have occurred either to it directly or to source materials on which it is based.

To update a field, select it and do one of the following:

- Press F9.
- Right-click it and choose Update Field.
- If the field is in a special container that has an Update button, then click that button (see Figure 21-3).

Update a field when it has been created or edited manually or when the source or circumstances have changed. Circumstances can include a wide variety of things that affect context. You will learn more about them throughout this chapter.

Field Display Shading

When you insert a date field using the Insert Date and Time tool, it initially looks like a simple date (depending on your settings — more about that later in this section). However, if you select the date or use the mouse to hover over it, you see something very different, as shown in Figure 21-3. The gray container shown is a special means by which Word displays some fields and a number of other features so that you realize you're not dealing with ordinary text. Not all fields display this way; in fact, most do not. Because date fields have been a frequent source of confusion and problems in the past, however, Microsoft has chosen to display them this way in recent versions of Word.

FIGURE 21-3

Date fields are enclosed in special containers to alert you to their special status. Notice the Update handle with the key assignment tip.

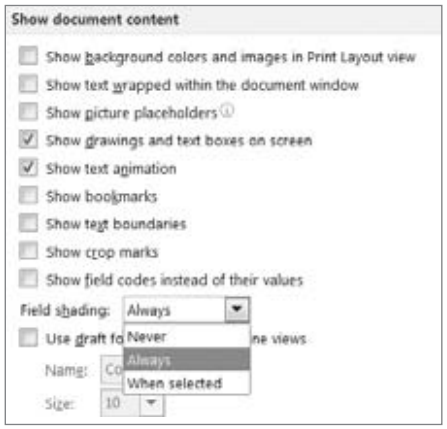


Most other fields, such as tables of contents and indexes, don't display in containers. How or if those fields display in a special way at all is up to you.

To change the way fields are displayed, choose File ➪ Options ➪ Advanced. Under Show Document Content, note the setting for Field shading, shown in Figure 21-4.

FIGURE 21-4

To avoid accidentally deleting or mishandling fields, it's a good idea *not* to set Field shading to Never.



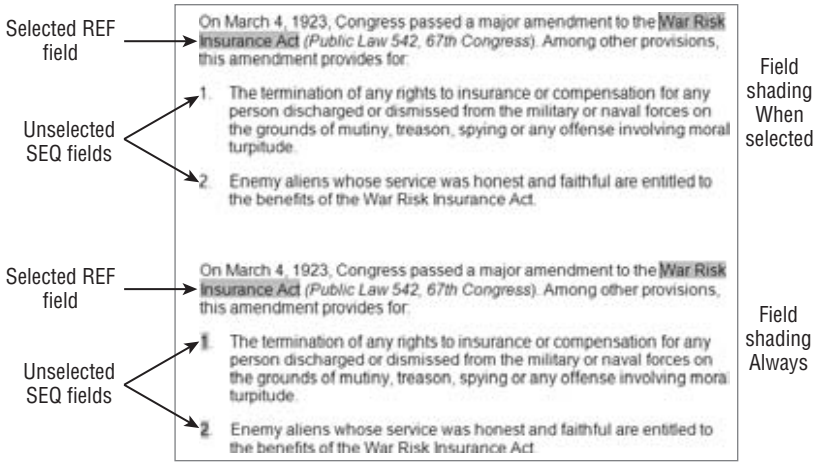
In addition to using special containers for some fields, Word can also shade fields so that you're aware of their presence in your document. The options are as follows:

- **Never:** This is not a good choice for everyday work; see the Caution below.
- **Always:** This is a great choice if you're prone to accidentally editing field results by mistake. Use this option if the presence of shading isn't too distracting.
- **When selected:** The default; this is a good compromise choice for most users.

By default, Word sets Field shading to When selected. This means that when a field is contained in your document, you won't necessarily know it until you click on the field and try to edit it. The When selected option is a good compromise, as it provides a nice balance of information and aesthetics. Contrast the two views shown in Figure 21-5. In the upper view Field shading is set to display When selected. The lower view has shading set to Always. If the document is heavily laden with fields, all that shading can be distracting. However, it's entirely up to you.

FIGURE 21-5

Some users find that Always field shading is too distracting.



Caution

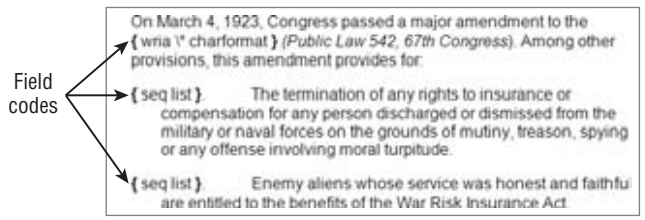
With Field shading set to Never, it's possible to edit the interior of a field's displayed results without realizing it. This frequently happens with dates and tables of contents. The next time you update fields (which can even happen automatically when you print a document), however, your careful edits get zapped! In Figure 21-5, for example, the selected REF field displays text that's bookmarked elsewhere in the document. A reason for REFing bookmarked text is so it will appear exactly as it appears at the source. If you need to edit the text, edit the source and then update any REF fields that refer to it. ■

Show Field Codes Instead of Their Values

The other major option shown in Figure 21-4 is Show field codes instead of their values. This option often is used to display the underlying field code either for diagnostic reasons or so you can manually edit it. If you don't see what you expect to see, toggling a field code display on can help solve the mystery. The same passage shown in Figure 21-5 is shown again in Figure 21-6 with field codes displayed.

FIGURE 21-6

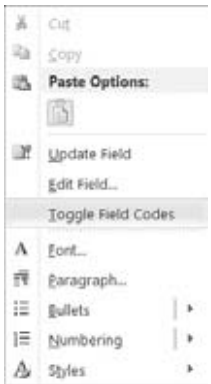
Displaying field codes enables you to see what's happening behind the scenes and figure out what's causing unexpected results.



The Show field codes instead of their values option shown in Figure 21-4 displays all field codes, not just the one in question. To see just the one in question, right-click it and choose Toggle Field Codes, as shown in Figure 21-7. If multiple fields are selected, this command will toggle all fields in the selection. Toggling one or several field codes can be helpful when you're trying to understand what's happening with a particular set of related fields. If you are familiar with the syntax of the field, you can also edit the field directly, rather than editing it with the Field dialog box or using other indirect methods (such as Insert ➪ Date and Time or Page Number).

FIGURE 21-7

Right-click a field (or a selection that contains multiple fields) and choose Toggle Field Codes to show the underlying field codes for fields in the selection.



Note

After creating or editing a field code, don't forget to update it. Otherwise, it will either not display a result at all or not display the new result. ■

Field Keyboard Shortcuts

When you need to display all the fields as codes, rather than having to drill into the File ➪ Options ➪ Advanced settings, it's much simpler and quicker to press Alt+F9. There are other field-related shortcut keys as well. To help remember them, it's useful to know that all field code keystrokes incorporate F9 or F11, as shown in Table 21-1.

TABLE 21-1

Field Keyboard Shortcuts

Shortcut	Action
F9	Update fields — updates all fields contained in the current selection.
Ctrl+F9	Insert field characters — inserts new field code braces for manually inserting fields.
Shift+F9	Toggle field display — toggles field code display for fields contained in the current selection.
Alt+F9	View field codes — toggles field code display for all fields in the entire document.
Ctrl+Shift+F9	Unlink fields — converts all qualifying fields in the selection into hard text; once this action is done, the field can't be updated anymore.
Alt+Shift+F9	Do field click — alternative to double-clicking MacroButton and GoToButton fields.
F11	Next field — selects the next field in the document. Field codes do not need to be displayed for this command or the next.
Shift+F11	Previous field — selects the previous field in the document.
Ctrl+F11	Lock fields — prevents fields in the selection from being updated.
Ctrl+Shift+F11	Unlock fields — unlocks fields so that they can be updated.

Lockdown!

In Table 21-1, notice the last two commands. Unknown by most users, these aren't used nearly enough, but they are exceedingly useful when you want to control whether a date field, a link to bookmarked text, or some other field can be updated. Select the field (in fact, if it's the very next field in the document you can press F11 to go right to it), and press Ctrl+F11. Press F9 to try to update it. It doesn't work! Press Ctrl+Shift+F11 to unlock it. Now F9 works.

Tip

If you want a good test field for trying out such behavior, insert a TIME field, using an option that includes displaying seconds. That way you'll never have to wait more than a second before the field is out of date. ■

Recall from the beginning of this chapter that some field operations have been replaced by XML relational linking — such as when you insert a link to a picture. In Word 97-2003 compatibility mode, you still get an INCLUDEPICTURE field, but not in a Word 2007 or 2010 `.docx` file. What's interesting is that the F9 key works to update the non-field picture links, but Ctrl+F11 does *not* work to lock them. Worse, once you've updated such a link by pressing F9, Ctrl+Z won't undo the update. Forewarned is forearmed!

Contextual Field Tools

In addition to the Toggle Field Codes option shown in Figure 21-7, there are other contextual commands. Note that these appear only when a field is selected:

- **Update Field:** See "Updating Fields" earlier in this chapter.
- **Edit Field:** This command opens the Field dialog box for the selected field, as shown in Figure 21-8. This enables you to use the interface to make changes in the field, rather than edit the field directly. Use this option if you're uncomfortable with direct field editing and/or you're unfamiliar with the needed syntax. Note that Edit Field does not work with all fields in the same way. For example, it doesn't work with the Table of Contents (TOC) field unless the entire table of contents is perfectly selected. If you get a generic Field dialog box rather than the specific one you're looking for, verify that the selection doesn't include something other than a field code, or return to the original command that created the field (such as Insert ➪ Table of Contents).

Caution

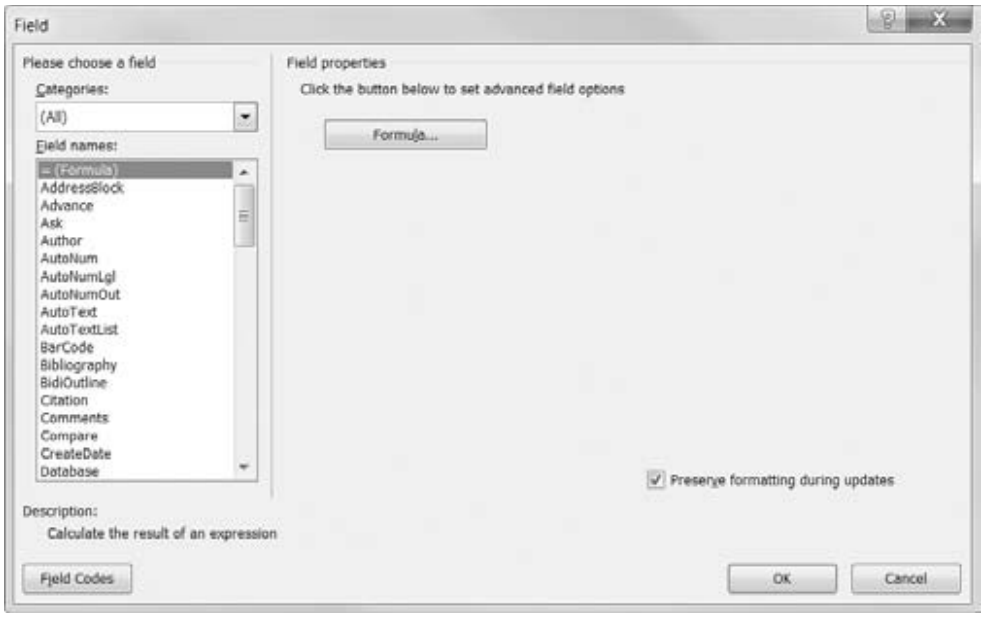
If a block of text is contained in the selection, Word displays the default Field dialog box rather than the setup for any particular field. If you proceed nonetheless, any field you insert will replace all the selected text rather than affecting a single field (unless you have Typing replaces selected text turned off, as described in Chapter 6). ■

The Field Dialog Box

When the need to insert a field arises, choose Insert ➪ Quick Parts ➪ Field to display the dialog box shown in Figure 21-8. The Field dialog box has several dimensions and personalities. Figure 21-8 shows the Field properties view. In this view, you choose the options you want and Word automatically builds the necessary field code for you when you click OK. You don't have to soil your hands with the actual field, so to speak.

FIGURE 21-8

The Field dialog box's Field properties personality lets you pick the options, and it builds the field code behind the scenes.



Under Please choose a field, if you choose All, all the 77 different fields (at least the ones to which the interface provides access) are shown under Field names. The dialog box also provides nine categories that can help steer you in a particular direction. The categories aren't absolutely definitive, however, and you might not think about them the same way Microsoft does, so don't be surprised if something you know is there, isn't where you expect it to be.

Note

Word has additional field codes that aren't accessible through the Field dialog box. Information on these is beyond the scope of this book, but you can find out more on the Microsoft Developer Network (MSDN) website. ■

If you're just exploring, click the second item under Field Names and observe the right side of the dialog box. As you choose different fields, the array of Field properties and Field options changes. The offerings on the right are determined by the type of field and its capabilities. For example, some are designed to work with bookmarks, and a list is offered accordingly. Others work with dates, and corresponding date formats are shown from which you can choose.

Caveat Mergeformat

Note that many fields have an option to Preserve formatting during updates. When you select this option Word adds a * MERGEFORMAT switch to the field code. For example, a DATE field code with this option might look like this:

{ DATE \@ "MMMM d, yyyy" * MERGEFORMAT }

The *MERGEFORMAT switch tells Word to preserve any formatting you might have applied so that in a subsequent update your formatting will be preserved. That is the theory, and it works quite well for some fields, including dates. For example, if you make that date bold, it will stay bold in subsequent updates.

However, it doesn't necessarily work for REF fields to bookmarks for which the contents change, or for a number of other fields. Consider what happens if the bookmarked passage is

[Now is the time for all good men to come to the aid of their country.]

You can use a REF field to reproduce that text elsewhere in the document. If the bookmark's name is countrymen, the field code { REF countrymen * MERGEFORMAT } could reproduce the original text elsewhere in the document. Suppose you add italics to the word *good* in the reproduced text, but it's not italicized in the original. With the MERGEFORMAT switch in place, updating the field will leave "good" alone. Without the switch, "good" reverts to its original form.

Now consider what will happen if you completely rewrite the original text so that it no longer contains the word *good* at all, but still uses the same bookmark. In this case Word arbitrarily formats the seventh word in italics when you update the REF field! Keep this odd behavior in mind before you rely heavily on the Preserve formatting option. It's best when formatting field results to use only formatting that applies to the entire field result, rather than to individual words.

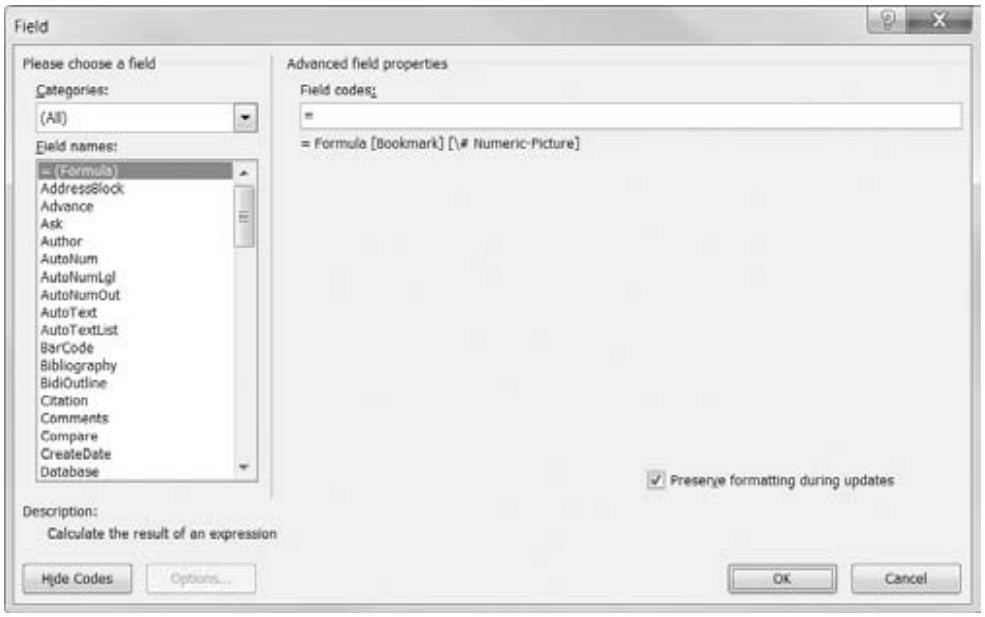
Field Codes and Hide Codes

Looking back at Figure 21-8, with Categories set to (All) and Field Names set to = (Formula), notice the Field Codes button in the lower left corner. If you click it, the button face now says Hide Codes. The right part of the dialog box now says Advanced field properties, and Click the button below to set advanced field options, along with the Formulas button, has been replaced by a Field codes box with an equals sign in it, and = Formula [Bookmark] [\# Numeric-Picture] below it, as shown in Figure 21-9.

The syntax model shown below the Field code textbox provides information on the expected format of the field. For this particular field, notice that the Options button next to Hide Codes is grayed out as unavailable. That doesn't mean that no options are possible for this field code. It means simply that none are provided by the interface for this particular field. If that's not sufficient, you have several options. You can click Hide Codes and then use the interface to create the field. Or you can search the Help system. Some of the help provided is quite extensive, providing both documentation and examples.

FIGURE 21-9

With the Field codes box displayed, the Field dialog box provides a place for you to enter the field code, and displays the *syntax model* below the fill-in box.



Field Syntax

Some fields are very simple. Their only syntax is the keywords by which they're identified. The field { AUTONUM }, for example, uses no parameters whatsoever. Other fields can be rather complex, requiring both parameters and switches to achieve the desired effect. Furthermore, for some reason known only to Microsoft, some fields require quotes around literal arguments, while others do not.

Although syntax can vary substantially for various field types, a number of general rules apply. The general form for the field statement is as follows:

{ keyword [arguments] [switches] }

Note that anything inside [brackets] is optional. Anything not in brackets is required.

The keyword can be any one of 77 field types (more, actually, but some are known only to men in black suits — Word add-ins sometimes use fields created by 3rd parties; those fields can be used only if the corresponding add-in has been installed). The field character pair, which you can insert by pressing Ctrl+F9, can also be used to enclose just a bookmark reference, such as {duedate}. In such cases, the REF keyword is implied, and is almost equivalent to {REF duedate}.

I say *almost* equivalent, because the two fields behave differently sometimes. For example, if you apply formatting to a REF field code's displayed results, Word adds a * MERGEFORMAT switch to the field. If you apply formatting to a plain bookmark field that doesn't use REF, Word will not add the switch. If you right-click a REF bookmark field and choose Edit Field, you'll get the full services of the REF field, replete with a list of bookmarks and switches. If you right-click a plain bookmark field, you'll get no services at all.

Anytime the first word in a field statement isn't one of the 77 recognized keywords, Word tries to interpret the field as a bookmark. When manually inserting a field code, if you mistype or if the bookmark name isn't otherwise defined, when you try updating the resulting field Word informs you that something is wrong by yelling "Error! Bookmark not defined." If you see this error message, it means that you've mistyped a keyword or a bookmark, or that a bookmark has been deleted.

The actual ordering of arguments and switches matters sometimes, but not always. As a general rule, switches that affect the entire field precede any arguments. A switch that affects a particular parameter usually appears immediately after the parameter it affects.

You can use three types of general switches. These can be used with a number of different fields and they affect how the results of fields are displayed:

- Text format
- Numeric format
- Date format

Text Format Switches

Text format switches use the following syntax:

* *format*

They are used to affect how certain text will appear. The format options can be any of the 14 keywords that follow.

Alphabetic

This switch converts the numerical result of an expression into lowercase letters, producing an alphabetical numbering result. For uppercase letters, capitalize the first letter of the alphabetic switch: Alphabetic.

The numerals 1 through 26 produce a through z, 27 through 52 produce aa through zz, and so on. For example, {= * alphabetic 2} displays as a single lowercase b. If you add 26 to it (28), it displays as two b's, etc. The maximum number you can display this way is 780, which displays as 30 z's. Use this if you're planning a nap.

Arabic

This switch is the default and results in normal Arabic numerals. For example, {=2^16 * Arabic} displays as 65536.

Caps

Any text in the resulting expression is displayed in initial caps. For example, with the SET bookmark field {SET greeting "dear senator"}, the corresponding bookmark reference {greeting * caps} would result in Dear Senator.

Cardtext

This switch displays a numeric expression in cardinal form. For example, {=666666 * cardtext} displays as six hundred sixty-six thousand six hundred sixty-six. This can be handy if you use Word to write legal documents in which numerical amounts and dates sometimes are spelled out.

Charformat and Mergeformat

The CHARFORMAT switch affects the character format of text that's displayed. If neither CHARFORMAT nor MERGEFORMAT is specified, the text is displayed exactly as it appears in its original form.

If * CHARFORMAT is specified, the displayed result has the same character formatting as the first character in the field keyword or bookmark name. This lets you permanently set the formatting of the displayed result.

If *MERGEFORMAT is specified, the displayed result takes on the character format of the current result the next time the field is updated. When no format switch is used, note that a reformatted field always reverts to the original format when updated. If you change the text contained in the bookmark when * MERGEFORMAT is specified, any new formatting done to the displayed field result will be applied to the field when it is updated. Without * MERGEFORMAT, the displayed formatting of the field will revert to that of the text it references. Use the following guidelines when you have to decide which switch to use:

- Use no switch at all when you want to preserve original formatting. You might want to do this for such things as business logos whose original appearance must not vary by context.
- Use * CHARFORMAT when you want to ensure that the display result matches what you're typing right now, such as boilerplate text, an address, or the signature line in a letter. The first letter of the bookmark will be in your current font and point size (unless you explicitly change it), pretty well guaranteeing that the displayed text will blend in.
- Use *MERGEFORMAT when you plan to reformat the displayed text and want the formatting retained. You might use this approach for special text — such as a book title or product name — for which the font might vary markedly depending on where you're using it.

Dollartext

The dollartext argument is a variation of cardtext, producing the kind of result you might want when writing the amount in long form on checks. For example, { = 4577.89 * dollartext} would result in four thousand five hundred seventy-seven and 89/100.

Firstcap

The firstcap argument capitalizes the first word only in the displayed result. For example, {QUOTE * firstcap "now is the season of our disco tent"} would result in Now is the season of our disco tent.

Note that with the firstcap argument you would still get the identical result even if the text inside the field were all capitals or alternating capitals and lowercase.

Hex

The hex format switch displays a number in hexadecimal form. For example, { = 16384 * hex } displays as 4000. The largest number that can be displayed this way in Word 2010 is 65,535 (FFFF).

Lower

The lower format setting displays text in all lowercase. For example, {QUOTE * lower "WHAT DO YOU MEAN 'STOP YELLING!'"} results in what do you mean 'stop yelling!'

Ordinal

The ordinal parameter adds st, nd, rd, and th endings to numbers. For example, { =5283 * ordinal} produces 5283rd.

Ordtext

Ordtext adds ordinal endings to the text versions of numbers. For example, {= 999999 * ordtext} yields nine hundred ninety-nine thousand nine hundred ninety-ninth. That, by the way, is as high as Word will go. The number 1,000,000 results in an error.

Roman

The roman switch dresses your text up in a toga. Just kidding. Roman yields a Roman numeral. The expression Microsoft Office { =2010 * ROMAN } results in Microsoft Office MMX. Incidentally, the highest you can go is 32,767, which results in MMMMMMMMMMMMMMMMMMMMMMMMMMMMMMMDCCLXVII. Higher numbers are met with an error message. The lowest you can go is 1 because, as every math student learns, the Romans had no zero. If you try to display 0, you'll get only a simple space. Try a negative number, and your computer will explode! (Not really, but you'll get an error message.)

Upper

The upper parameter causes the field's text to display in all caps. For example, {QUOTE * upper "tHiS iS mIxEd Up"} rather disingenuously proclaims THIS IS MIXED UP.

Numeric Format Switches

Numeric format switches, sometimes called *numeric picture switches*, have the following syntax:

\# format

These are quite versatile, enabling you to format numbers in a wide variety of ways.

(Number Placeholder)

The # parameter is sometime a source of confusion. That's because in addition to being used as the overall numeric format switch (\#), it can also be used as a specification or argument within the switch — for example, {=6765.44 \# $#,.##}. Note that the \# in this field is the numeric switch. The additional #s specify how the number should appear. In this case, the noted field would produce $6,765.44. The $ means that the result will be preceded by $. The next # is a placeholder for any significant digits to the left of the decimal point. The comma means that commas will be used every three places to the left. The remaining .## reserves two significant digits to the right of the decimal point. The number 6765.444444 would therefore be displayed as $6,765.44.

0 (Zero Placeholder)

The numeral 0 is used as a placeholder to guarantee the same order of precision in numbers. This is useful when you have multiple formula fields that ordinarily might yield different precisions. For example, it's generally unacceptable to list the same statistic for different individuals using different precisions, such as in the following table:

Courtney	4.216
Ryan	3.7
Colleen	4.4
Matt	4.7231

Suppose these numbers were all exact, and the result of calculations performed by Word. By using the same numeric switch in all the calculation fields (for example, {=59/14 \#0.000}), you ensure that all the results are shown to thousandths, with a leading 0 for any that are less than one (for example, 0.412 instead of .412).

X

When X is used at the left edge of any other arguments, Word truncates additional digits that don't fit in the reserved space. For example, {=42753 \# x#.00} results in 53.00 because x# reserves only two places to the left of the decimal point. When used to the right of the decimal point, X serves the same purpose as #.

. (Decimal Point)

The decimal point is used in conjunction with # and 0 placeholders to specify the precision of the displayed result.

, (Commas for Three-Digit Groups)

The comma is used to insert commas to separate three-digit groups (thousands) to the left of the decimal point. If you want only commas and numbers, the comma and any other number placeholder (except for x) will work. You don't need {=55000 \# ###,###} to get 55,000. A simple {=45000 \# #,} works just as well.

+ (Force the Plus Sign to Display)

Include the plus sign to force the positive or negative display of the number. No sign is displayed for zero. Consider the following example:

The temperature in Frostbite Falls, Minnesota, was {=sum(weathertable[A1]) \# +#}

If the A1 cell in a table bookmarked as weathertable says −57, it will display as −57. If it's 37 in the table, then the field result will display +37, and the residents will be putting on their shorts and T-shirts.

; (Semicolon)

The semicolon is used to specify different formats for positive, negative, and zero. If a single semicolon is used, the picture format to the left controls the display of positive and zero values, and the picture format to the right of the semicolon controls the display of negative numbers. If two semicolons are used, the first argument specifies positive format, the second specifies negative format, and the third specifies zero format.

For example, consider the switch \# *+###*;^+###^;=0.#=. The numbers 65, −7, and 0 would display respectively as *+65*, ^−7^, and =0.0=. Why would you do that? Because you can!

' (Single Quote)

Single quotes are used to insert literal text into the number display when the text contains characters otherwise reserved for use as part of the format switch. When you do this, the entire numeric format must be enclosed in double quotes.

Enclosing reserved characters in single quotes prevents the single-quoted text from being interpreted as a numeric switch argument. For example,

{ =8.9 \# "Please add #.0% sales tax"} displays as

Please add 8.9% sales ta

Recall that X is a switch argument. For this to work properly, the *x* in *tax* must be enclosed in single quotes:

{ =8.9 \# "Please add #.0% sales ta'x'" }

You can, of course, enclose the entire literal text in single quotes. Minimum quoting is used here to demonstrate why it's necessary. Alternatively, move to a state that doesn't have a sales tax.

Date Format (Date-Time Picture Switches)

Date-time picture switches have the following syntax:

\@ *format*

They enable you to format dates in a variety of ways.

Tip

You can specify a desired default format using the Date and Time dialog box. Choose Insert ➪ Date and Time. Highlight the format you want to use for the default and click Default. Choose Yes to confirm. Back in the Date and Time dialog box, click OK to insert a date, or Cancel if you're simply changing the default. The default was changed when you confirmed changing the default; canceling doesn't cancel the change. ■

Date Format Elements

Date formats use key letters to represent parts of dates and times, as shown in Table 21-2. These key letters affect only the component that is displayed, not the capitalization. You must add the appropriate * switch to achieve different forms of capitalization. The field {date \@ "MMM"} produces Aug (an uppercase *M* produces months, while a lowercase *m* produces minutes). You would need to add * upper to get AUG. See "Switch Combinations" below for other exciting ideas.

Switch Combinations

Some of the switches can be combined. For example, * charformat or *mergeformat can be combined with any other format. The field {*q*uote * charformat * ordtext "9"} produces *ninth* (in italics because the *q* in *q*uote is in italics). However, none of the numeric arguments can be combined with case arguments, except for alphabetic.

TABLE 21-2

Time and Date Picture Switch Format Elements

Characters	Effect
AM/PM or am/pm	AM and PM or am and pm, respectively
A/P or a/p	A and P or a and p, respectively (please, no grocery jokes)
d	Date, with no leading zero
dd	Date, with leading zero
ddd	Abbreviated name of the day of the week (SUN, MON, etc.)
dddd	Full name of the day of the week (Sunday, Monday, you know the rest)
h	Hour, 12-hour format with no leading zero
hh	Hour, 12-hour format with leading zero
H	Hour, 24-hour format with no leading zero
HH	Hour, 24-hour format with leading zero
M	Numeric month, no leading zero
MM	Numeric month, leading zero
MMM	First three letters of month (Jan, Feb, etc.)
MMMM	Full name of month (March, April, etc.)
m	Minutes, no leading zero
mm	Minutes, leading zero
s	Seconds, no leading zero
ss	Seconds, leading zero
y or yy	Year, two-digit format (07, 08, etc.) (How quickly they've forgotten the Y2K problem!)
yyyy	Year, four-digit format (2010, 2011)

Categories

The Field dialog box separates the 77 fields covered into eight categories. In this section we will look at each category, the fields they contain, and what those fields are used for.

Date and Time

Word provides six different date and time fields. Of the six, note that only the DATE field itself, which provides the current date, uses the special document control container.

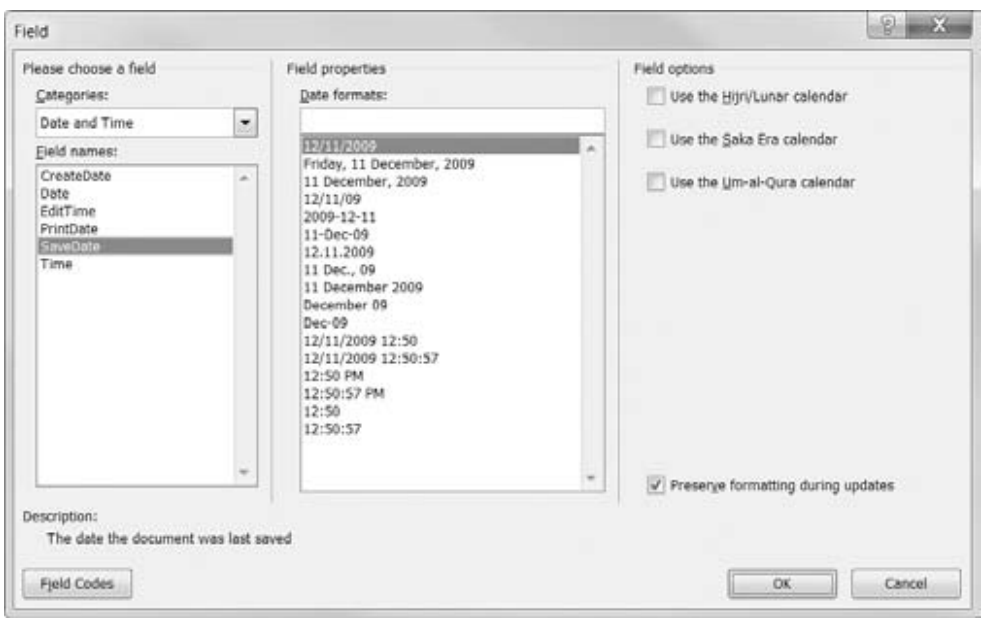
- **CreateDate:** The date the document was created
- **Date:** The current date
- **EditTime:** Cumulative time that the document has been open
- **PrintDate:** The last date that the document was printed
- **SaveDate:** The last date the document was saved
- **Time:** The current time

All of these except for EditTime can be used as either time or date fields depending on the picture switches applied. Note also that for each of the time and date fields, when you display the dialog box, as shown in Figure 21-10, the top format is shown (i.e., 12/11/2009), even if the selected field name is Time.

When you click OK, however, accepting what's shown, that's not what you get! In the case of Date, you will get the default date format (which you can change as shown earlier). In the case of Time, you will get just the time. For CreateDate, PrintDate, and SaveDate, however, you will get a combination of the default date and the time. Therefore, if you want one of those three — and you generally want the time as well — you don't need to build a formatting switch. It's already been done for you, the dialog box's display notwithstanding.

FIGURE 21-10

The Field dialog box can display any of the date and time fields (except for EditTime) using any combination of date and time elements.



Document Automation

The document automation fields are used mostly in building automated forms. The fields can be used to perform logical operations and to allow the user to run a macro, send special instructions to the printer, or go to a bookmark. Six fields are provided:

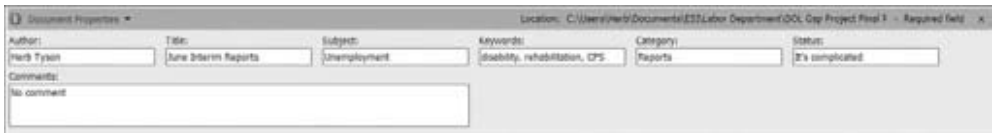
- **Compare:** Used in mail merge operations to test the values of data fields
- **DocVariable:** Used to display the contents of a document variable that was created by a macro
- **GoToButton:** Used to transfer the insertion point to a bookmark location. This field has been superseded by the Hyperlink field.
- **If:** Often used in mail merge documents to control the flow and to create conditional statements that control whether specific mail merge fields are printed
- **MacroButton:** Used to run a macro
- **Print:** Used to send special codes to your printer

Document Information

Document information fields are taken from the Document Properties panel, shown in Figure 21-11 (Developer ➪ Document Panel ➪ OK). This shows a simplified set of properties used by some, and required by others.

FIGURE 21-11

Word 2010's Document Properties information panel displays a small subset of what was called Document Properties in Word 2003.



These correspond to the Summary tab in the older-style Properties dialog box, shown in Figure 21-12. (In Word 2003 these were accessed from File ➪ Document Properties.)

Tip

If you need document properties but don't care for Word 2010's implementation, the legacy Properties dialog box from Word 2003 is still available. Choose File ➪ Info ➪ Properties ➪ Advanced Properties (in the right side of the window). If you'd like to access the legacy Properties dialog box directly, you can assign it to the QAT. Right-click the QAT and choose Customize Quick Access Toolbar. With Choose commands from: set to All Commands, click Advanced Document Properties ➪ Add ➪ OK. If you prefer to assign it to the keyboard, right-click the QAT, choose Customize the Ribbon ➪ Customize, set Categories to All Commands, click FileProperties, click in the Press new shortcut key field, press the desired keys, and then click Assign ➪ Close ➪ Cancel. ■

FIGURE 21-12

The Properties dialog box provides fuller access to all document properties.



The Document Information category contains a variety of document properties that you can insert into the document. With the exception of the DOCPROPERTIES field, each of the field codes can be inserted directly into the document to display the corresponding datum about the document. Note that some, such as COMMENTS, SUBJECT, and TITLE generally must be entered by someone (using the document panel or Properties dialog box). A number of these are automatically created by Word, such as FILESIZE, NUMCHARS, NUMPAGES, and NUMWORDS. The 14 document information fields are as follows:

- **AUTHOR:** The name of the person who created the document. This comes from the File ➪ Options ➪ General settings.
- **COMMENTS:** Has nothing to do with Word's Comments feature, and instead is any comments entered
- **DOCPROPERTY:** Used to insert any of 26 document properties into the current document, not just the list included in the Document Information fields
- **FILENAME:** The name of the current file, optionally including the path
- **FILESIZE:** The stored size of the file, available in several different formats
- **INFO:** Used to insert any of 17 summary information items
- **KEYWORDS:** Any document keywords that happen to have been inscribed in Document Properties

- **LASTSAVEDBY:** The name of the user who last saved changes to the document
- **NUMCHARS:** The number of characters in the document, excluding white space
- **NUMPAGES:** The total number of physical pages in the document
- **NUMWORDS:** The number of words in the document
- **SUBJECT:** The subject Document Information field, if populated
- **TEMPLATE:** The name of the currently attached document template
- **TITLE:** The title of the document, if one has been assigned. This is not the same as the filename.

Equations and Formulas

This group is used to perform calculations, manipulate characters, construct equations, and display symbols. While the formula (=) field will still attract a few diehard users in Word 2010, for the most part the functionality offered by this group is for backward compatibility. Four fields are provided:

- **= (Formula):** Used to perform calculations and format numbers
- **Advance:** Used to position characters for special effects and for simulating characters not available through the user's installed fonts
- **Eq.:** Used to create equation-like effects. This is provided for backward compatibility. Use Insert ➪ Equation instead.
- **Symbol:** Used to insert symbols. Use this approach instead of Insert ➪ Symbol if you need to retain information about the exact nature of the symbol being inserted.

Index and Tables

The index and tables fields are used to build and maintain tables of contents, indexes, and tables of authorities. The seven fields in this category are as follows:

- **Index:** Creates an index based on XE fields
- **RD:** Creates an index, table of contents, table of figures, or table of authorities using marked entries or heading styles in multiple documents
- **TA:** Used to mark a table of authorities entry
- **TC:** Used to manually mark a table of contents entry
- **TOA:** Creates a table of authorities based on TA fields
- **TOC:** Creates a table of contents using outline levels (heading styles) or TC entries
- **XE:** Used to mark index entries

Links and References

These fields are used to link content into Word documents from external files as well as from other parts of the current Word document. Several of the fields in this category have been superseded by newer and more powerful linking features in Word 2010 and 2007. Fields are provided in those cases both for backward compatibility and to allow for different methods if other options are preferred. The 11 fields in this category are as follows:

- **AutoText:** Inserts the contents of a Building Blocks Gallery item into the current document. You might use this rather than insert an entry using the Building Blocks Gallery or Quick Parts Gallery (see Chapter 13) if the contents/value of the underlying entry changes. For example, the item might contain an address, a telephone number, or boilerplate text that is subject to being updated. If you include a reference to the AutoText instead of the AutoText itself, the document can be more dynamic and updateable.
- **AutoTextList:** Creates a shortcut menu based on AutoText entries in a template that's currently available. The entry list can be based on the styles applied to the AutoText entries. For example, if you have a style named Color Choices, any entry formatted with that style will appear in the list. When the user right-clicks the AutoTextList item, the list of Color Choices appears. If you click one of the items, the AutoTextList field is replaced by the AutoText item chosen.
- **Hyperlink:** Inserts a hyperlink to a URL, file, or other location available on a disk, a network location, the Internet, or an intranet
- **INCLUDEPICTURE:** Used to link to a supported graphics file. Word 2010 defaults to an XML link instead of using INCLUDEPICTURE, although the field is still supported. An advantage of the INCLUDEPICTURE field is that it can be locked with Ctrl+F11 to prevent accidental updates and unlinking. When working in compatibility mode, Word defaults to INCLUDEPICTURE links because the XML method is not supported in earlier versions of Word.
- **INCLUDETEXT:** Similar to INCLUDEPICTURE but used to link to a nongraphic file. Word 2010 still uses the INCLUDETEXT field when you insert a link to a file, however.
- **LINK:** This field links information you copy and paste from another application to the original source file using OLE (object linking and embedding). You typically would use Paste ➪ Paste Special, choose the desired object type, and enable the Paste link option.
- **NOTEREF:** Used to insert a footnote or endnote reference mark that's been bookmarked so you can make multiple references to the same note, or to cross-reference footnotes or endnotes
- **PAGEREF:** Inserts the page number of a bookmarked location; used for cross-references
- **QUOTE:** Used to insert literal text. This field often is used with the IF field to conditionally insert different text based on a comparison with data from a database of some kind.
- **REF:** Used to insert bookmarked text. For example, you might bookmark the table number in a table caption and use that reference in the text. If other tables are inserted or deleted and the numbering changes, the REF field that refers to the bookmarked table number can be updated.

- **STYLEREF:** Used to insert the text of the nearest occurrence (searching up or down) of a style relative to the location of the STYLEREF field, or some datum related to that style occurrence. Often used in making dictionary-type headings wherein the first and last words defined on the page appear at the top of each page.

Mail Merge

The 14 fields included in the Mail Merge group are used in constructing mail merge documents of the type shown when you choose Start Mail Merge in the Mailing dialog box. See Chapter 43 for the full scoop.

Some of the fields in the Mail Merge category are also shown under Document Automation. The 14 Mail Merge fields are as follows:

- **ADDRESSBLOCK:** This field inserts a mail merge address block. Using the AddressBlock field is an alternative to specifying the address elements individually. You generally insert this field by clicking Address Block in the Mailings ribbon. See Chapter 43 for additional information.
- **ASK:** This field prompts you to provide information. It assigns a bookmark to the answer you provide, and the information is stored internally. A reference to the bookmark can then be used in the mail merge document to reproduce the information you type. A default response to the prompt can also be included in the field. The ASK field displays only as an empty bookmark in the mail merge document, so don't be surprised if you don't see a result.
- **COMPARE:** See the field of the same name under "Document Automation."
- **DATABASE:** This field inserts data into your document in the form of a Word table. When you create the field, you are prompted for a database from which records can be filtered and selected. The result can appear either as a normal Word table or as a field masquerading as a table. One use for this field is to extract data into a file that can then be used for mail merges. You might want to do this when the larger dataset is tied to a server and will be inaccessible to the ultimate mail merge users. You might also do this simply to present data in a table in a Word document. If you keep the database result in the form of a field, it can be updated when and if the underlying data change.
- **FILLIN:** This field prompts you to enter text, and then uses your response in place of the field in the mail merge document. This is similar to the ASK field, except that the information can be used only in one place.
- **GreetingLine:** This field inserts a greeting line into your mail merge document. It usually is inserted by means of the Greeting Line button in the Mailings ribbon. See Chapter 43 for additional information.
- **IF:** See the field of the same name under "Document Automation."
- **MERGEFIELD:** This is used as a token placeholder for a mail merge field inserted from a database. For example, rather than Dear John, you might see Dear « FirstName » in your document. Or you might instead see « GreetingLine ». See Chapter 43 for additional information.

- **MERGEREC:** When you're doing a mail merge, the MERGEREC field serves as a counter of records in the data file and doesn't count the number of documents actually printed. This field is incremented by the presence of NEXT and NEXTIF fields. If you skip records using SKIPIF, MERGEREC is incremented nonetheless. See Chapter 43 for additional information.
- **MERGESEQ:** This field provides a counter of mail merge documents that actually result from a merge. If you merge the entire database and do not change the base sorting, and if no records are skipped, MERGESEQ and MERGEREC will be identical.
- **NEXT:** The NEXT field is used to include more than one record in a given document. Ordinarily, when you're doing a mail merge, one document is printed for each record. With the NEXT field, however, you can include multiple records in a single document. This can be useful when you need to refer to several addresses from a data file.
- **NEXTIF:** The NEXTIF statement works like the NEXT field except that it advances to the next record only if an expression being evaluated is true.
- **SET:** The SET field is used to change the text referred to by a bookmark. For example, an occurrence of the text July 4, 2010, might be bookmarked as dayoff in one part of the document, and dayoff might be referred to in other parts of the document with a REF field. If you want to change the date referred to by the bookmark, you can either change the original underlying text at the site of the original bookmarked instance of July 4, 2010, or you can use a SET field to change it.
- **SKIPIF:** The SKIPIF field is used to cancel processing of the current database record during a mail merge. For example, you might use it to screen out a particular ZIP code.

Numbering

Numbering fields are used to insert certain kinds of numbering into your documents. The 10 field codes in the Numbering category are as follows:

- **AUTONUM:** The AUTONUM field inserts an automatic paragraph number field. The resulting numbers are displayed as 1., 2., 3., and so forth. AUTONUM is incremented in each paragraph. If you include multiple AUTONUM fields within the same paragraph, they will all display the same number. General formatting switches are ignored by this field, and updating is automatic — you don't need to press F9. The AUTONUM field is designed for numbering paragraphs or sections of a document. Some users find it less flaky than Word's Numbering tool and automatic list numbering, especially in legacy documents from Word 2003 and earlier.
- **AUTONUMLGL:** AUTONUMLGL inserts an automatic paragraph number field code whose results are displayed in legal style as 1., 1.1., 1.1.1., etc. AUTONUMLGL is tied to Heading level styles (Heading 1 is 1., Heading 2 is 1.1, and so on). All general format switches are ignored by this field and updating is automatic each time a paragraph is inserted or deleted. AUTONUMLGL displays the same as AUTONUM when used in non-Heading-style paragraphs.
- **AUTONUMOUT:** AUTONUMOUT inserts an automatic paragraph number field code whose results are displayed with traditional outline numbering (I., A., 1., a., and so on).

Like AUTONUMLGL, AUTONUMOUT works with Heading level styles, and updating is fully automatic.

- **BARCODE:** This field inserts a BARCODE into the current document. If you see a Bookmark not defined error code instead of a bar code, toggle field codes and remove the \b switch. According to Word this feature has been removed. It has and it hasn't. Other parts of the Word interface no longer provide access to it, but it remains as a field code for two reasons: a) for compatibility with legacy documents and b) to annoy the post office. Use it at your own risk. See the discussion of bar codes in Chapter 3.
- **LISTNUM:** This field inserts a set of numbers anywhere in a paragraph. Unlike the AUTONUM fields, LISTNUM is incremented each time you use it. Also unlike the AUTONUM fields, LISTNUM supports several switches that enable you to control how numbering is performed, the starting number, and the list level: 1), a), i), (1), (a), (i), and so on (feel free to experiment to see what each level produces). A common instance in which you'd use LISTNUM is when you're numbering things within a paragraph and don't want to worry about having to renumber them when you insert or remove items. For example, "I needed to 1) make a list of things to do, 2) do the things on the list, and 3) add additional things to the list." In this case, a LISTNUM field would be used to create 1), 2), and 3). Like AUTONUM, LISTNUM is updated instantly and automatically anytime another LISTNUM field is inserted or deleted. If you make a to-do list, however, LISTNUM won't do the things on the list for you.
- **PAGE:** Use this field to insert the current page number. It's used most often in creating page numbers in headers and footers.
- **REVNUM:** The REVNUM field comes from the Advanced Properties Statistics tab. The revision number is incremented each and every time the document is saved. For the average paranoid but savvy Word user, this makes REVNUM essentially worthless. For example, REVNUM indicates that this particular chapter has now been saved 212 times. Note that REVNUM is unrelated to the Versions feature from Word 2003 (which Word 2010 does not support).
- **SECTION:** The SECTION field inserts the section number of the current section. This can be useful in setting up some kinds of compound numbering that numbers pages by section, but in which numbering is not being applied to a Heading style that varies by section.
- **SECTIONPAGES:** The SECTIONPAGES field inserts the number of pages in the current section. When you're numbering by section and want to include the length of each section, a common page numbering setup would be Page {section}–{page} of {sectionpages}.
- **SEQ:** The SEQ field is used to insert a sequence number into a document. SEQ is used to number chapters, tables, figures, illustrations, lists, or anything else not already covered by a built-in numbering system. While it's more complex than Word's built-in numbering system for numbered lists, many users found that in past versions of Word, the SEQ field was a lot more predictable and dependable than the numbered lists feature, and that its use resulted in fewer problems. You can create any number of independent numbering sequences in a document, and switches provide full control over numbering features.

User Information

User information corresponds to the User Name and Initials fields in File ➪ Options ➪ General, as well as to the Mailing Address field found in File ➪ Options ➪ Advanced ➪ General. The three user information fields are as follows:

- **USERADDRESS:** Your mailing address, if you chose to enter it
- **USERINITALS:** Your initials, if you entered your name in the Personalize settings
- **USERNAME:** Your name, if you entered it in the Personalize settings

Summary

In this chapter you've learned about field codes: what they are, how to insert them, and why you might want to. You've also learned about some new features in Word that don't use field codes, so you can decide when to go with the new, and when (if ever) to stick with the old. You should now be able to do the following:

- Decide when or when not to use the * CHARFORMAT or *MERGEFORMAT formatting switches
- Lock a date field to keep it from being unintentionally updated
- Use field codes to set up a variety of different kinds of page numbering
- Understand the difference between a FILLIN and an ASK field, and when to use each
- Use the LISTNUM field to a) set up this kind of numbering within a paragraph and b) avoid having to renumber this kind of within-paragraph numbering when you add or remove an item
- Use Ctrl+Shift+F9 to convert a field result into actual text

CHAPTER

22

WordArt

Classic WordArt, as users of Word 2007 and earlier knew it, is gone. Well, sort of. If you like the replacement feature — great. If you don't, there's a workaround that allows you to use classic WordArt in `.docx` files, although you might not like having to jump through hoops.

WordArt provides the answer to the question "How do I [*insert strange verb here*] text?":

- If you need to know how you can stretch text diagonally across the page so you can make a CLASSIFIED watermark, WordArt is the answer.
- If you need to know how you can make a fancy banner headline for a newsletter or flyer, WordArt is the answer.
- If you need to know how to rotate text to any angle, WordArt is the answer.
- If you need to know how to place text in a circle for making a button, WordArt is the answer.

In short, if there's something creative you need to do to text, and Word's normal text tools don't even come close to what you need, then WordArt probably has what you're looking for. Figure 22-1 shows several of the nearly infinite varieties of different text shapes and effects you can create using classic and Word 2010 WordArt. (Most of what you could do with classic WordArt can also be done with Word 2010 WordArt, but it might take some experimentation to get there.)

IN THIS CHAPTER

Creating WordArt from existing text

Creating WordArt from scratch

Editing and shaping WordArt

Using live preview to change WordArt gallery style and shape

FIGURE 22-1

Just a few of the literally thousands of things you can do with classic and Word 2010 WordArt.



Classic WordArt Word 2010 WordArt

Creating WordArt

To create WordArt — Word 2010 style — choose WordArt from the Insert ribbon and click a WordArt gallery style. Don't cogitate forever about which gallery item to use. If you don't like it, you can easily change it later.

In fact, it's better to go ahead and simply pick something, because that way when you change your mind you can use Word's live preview, as you'll see shortly. This lets you make a more fully informed choice, as you see the different options in action.

Creating Classic WordArt

Classic WordArt can be created only in Compatibility Mode — unless you're willing to create a macro (see the tip). The good news is that classic WordArt functions just fine in a Word 2010 file. So whether you use the macro, copy it from an existing `.doc` file, or convert a `.doc` file to `.docx` format, it will function fully as a classic WordArt object in a Word `.docx` file — complete with all of Word's manipulation tools. Will this be true in Word 15? Who knows? But, for now, it works.

Tip

If you need to create classic WordArt objects, a simple one-command macro allows you to create them without having to resort to Compatibility Mode. I'm going to assume that you know how to create a macro — otherwise jump ahead to Chapter 49 and then come back. Create the following macro:

```
Sub InsertWordArt()
WordBasic.InsertWordArt
End Sub
```

Once you've created this macro, you can assign it to a keyboard keystroke (see Chapter 45), add it to the QAT (see Chapter 46), or even put it onto the ribbon (see Chapter 47). You might notice that there is a classic WordArt command in the Customize QAT list, but it's grayed out unless you're in Compatibility Mode. The macro version is not limited. ■

In the remainder of this chapter I'll be talking about Word 2010-style WordArt. I'm going to assume that if you've jumped through the necessary hoops to create classic WordArt, you already know the ins and outs, or that you have a copy of *Word 2007 Bible* you can use for reference.

Creating WordArt from Selected Text

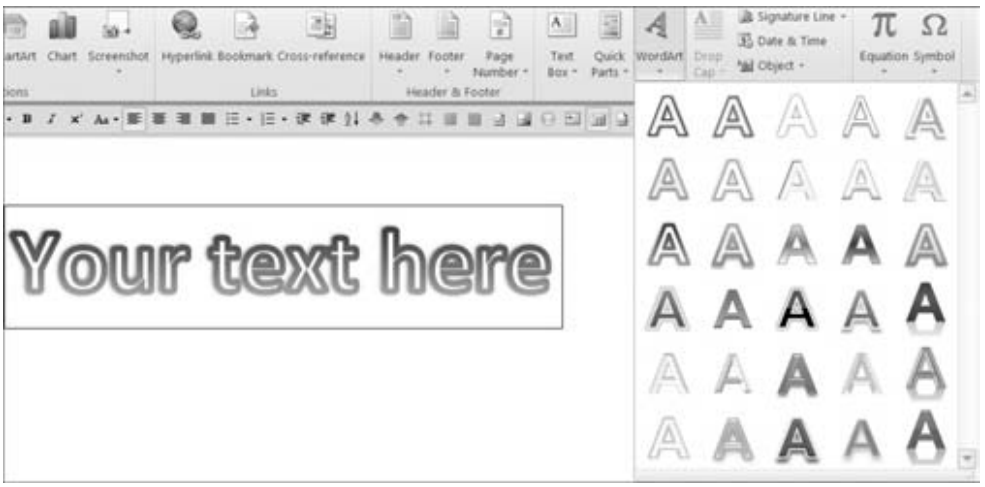
If text is selected when you click a gallery style, Word will automatically use it to create the WordArt object. Unlike in Word 2007 and earlier, the 10-word/200-character limit is gone. If you're a glutton for visual punishment you can apply WordArt effects to an entire document. Visual punishment? Yes, that was a preemptive reprimand, unless it's a very short document destined to be a banner or poster, or something like that.

Creating WordArt from Scratch

If no text is selected Word presents you with the WordArt Style gallery, shown in Figure 22-2. Once you click a style Word applies the style to the phrase Your Text Here, in a textbox.

FIGURE 22-2

You can create WordArt from selected text or compose it in the textbox Word creates for you.

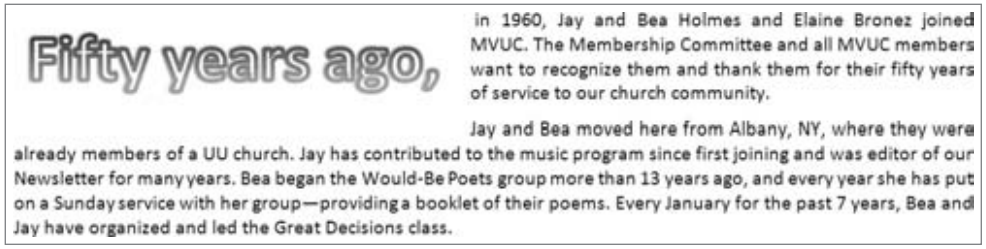


If no text is selected the WordArt textbox is inserted in the upper left corner of the document (although not in the header), formatted with wrapping set to In Front of Text. You can change the wrapping as desired, and drag the WordArt textbox where you want it.

If text is selected, the WordArt textbox is inserted at the beginning of the current paragraph, formatted with the Square wrapping style. The presumption is that you want to use the selected word to create a decorative effect at the beginning of the paragraph, as shown in Figure 22-3.

FIGURE 22-3

WordArt assumes that selected text should be drop-cap style at the beginning of the current paragraph.



Note

When you insert WordArt, Word attaches the textbox to the current paragraph's paragraph mark. Unfortunately, this attachment is not always obvious. If you subsequently delete the paragraph mark that "owns" the WordArt textbox, the textbox will be deleted as well. So, when you're deleting text in a document that contains a textbox that is not formatted as "In line with text," it pays to be vigilant.

Note also that WordArt textboxes are *not* inserted with the default wrapping style (set in File ➪ Options ➪ Advanced ➪ Cut, Copy, and Paste ➪ "Insert/paste pictures as"). ■

WordArt Styles

When you're creating WordArt using the WordArt tool, the WordArt Styles gallery displayed (refer to Figure 22-2) does not provide live preview. If you create WordArt entirely from scratch — by inserting a textbox, typing your text, and then using WordArt Styles — then live preview is provided.

Because WordArt is integrated into Word's main graphics engine, you will see the same text-formatting tools that are available for textboxes and the same shape-formatting tools that are available for all Word shapes. You will notice that there is also a lot of overlap of applicable tools when you're working with pictures. The full range of tools is shown in the Drawing Tools Format ribbon tab, in Figure 22-4.

FIGURE 22-4

Word uses the Drawing Tools Format ribbon for formatting WordArt.



Formatting WordArt Text

Use the tools in the WordArt Styles and Text sections to format text. Unlike with classic WordArt, any of these formatting tools can be applied letter by letter. In addition, normal Font and Paragraph formatting can be applied as well.

Note that in previous versions of Word, non-inline textboxes could be rotated to any angle, but the text could only be displayed at 0, 90, and 270 degrees. Word 2010 textbox text, and therefore WordArt text, can be rotated to any angle. You're not limited to the Text Direction tool.

Formatting WordArt Shapes

As noted earlier, WordArt shapes can be formatted like any other Word shapes. The complete range of formatting available is covered in Chapter 26.

Two particular features of the new implementation of WordArt in Word 2010 are worth noting, however. First, as noted earlier, you can rotate WordArt text to any angle. Second, you can reverse WordArt both horizontally and vertically — by dragging top over bottom, side over side, and corner over corner, essentially flipping the object and the text it contains. This provides considerable flexibility for a wide variety of creative projects.

Using the Format Shape Dialog Box

Earlier you were urged not to spend a lot of time deciding about the basic gallery shape and color when first inserting a WordArt object. Now that the WordArt object has taken up residence in your document, it's time to reflect on the exact effect you're looking for. Unlike when you first inserted the WordArt object, however, now you'll have the luxury of live preview.

If necessary, click the WordArt object to activate the WordArt Format ribbon. Click the More drop-down arrow at the right end of the WordArt Styles gallery. As suggested by Figure 22-5, the WordArt Styles gallery is a live preview tool, and updates the selected WordArt object as you move the mouse over different styles. It also can be applied to individual words and characters, unlike classic WordArt. When you see the effect you want, click it.

Note that you can drag the southeast corner of the gallery up and to the left, if necessary, to expose more of the WordArt object you're trying to change.

Note

The WordArt Styles gallery — as well as other Format tools, whether live preview or not — can be applied to multiple WordArt objects at the same time, but only if they have been grouped together. If you need to apply the same formatting to multiple WordArt objects, format the first and then use F4 (repeat formatting) to format subsequent items before resuming other editing. ■

FIGURE 22-5

The WordArt Styles gallery provides a live preview of the selected object as you mouse over the different style options.



Shape Styles

The Shape Styles gallery tool provides access to 40 different WordArt shape styles, letting you apply a variety of different fills and textures. To see the gallery, click the More button at the right edge of the Shape Styles gallery. To fully appreciate the depth, you need to see it onscreen — a grayscale picture in a book can go only so far, as shown in Figure 22-6.

Also shown in Figure 22-6 are the Shape Fill, Shape Outline, and Shape Effects tools. The first two obviously control the contents and outline of the shape. Shape Effects lets you control shadow, reflection, glow, soft edges, bevel, and 3-D rotation.

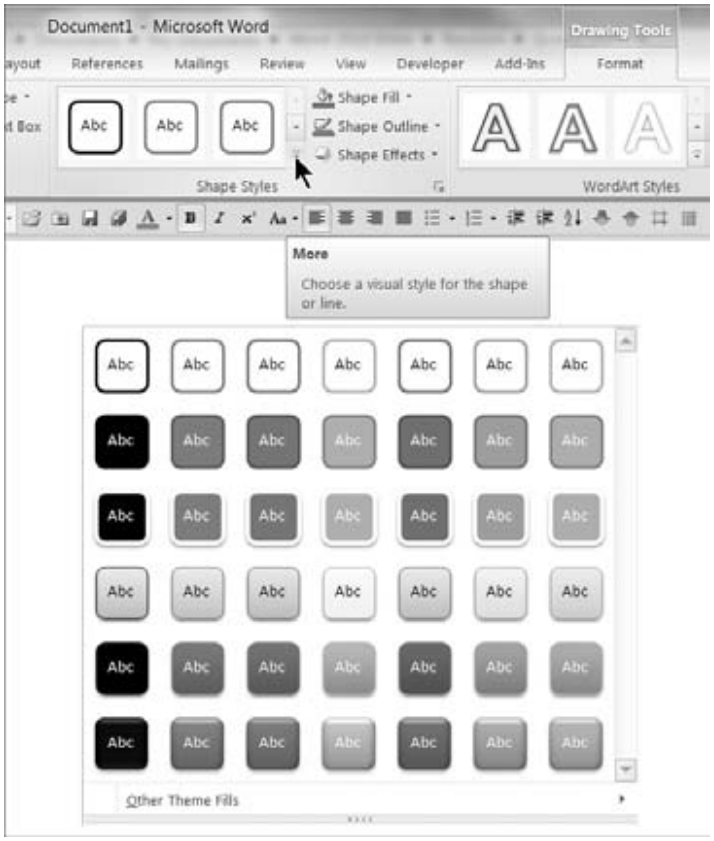
Rotation

Click Shape Effects ➪ 3-D Rotation ➪ 3-D Rotation Options to display the Format Shape dialog box's 3-D Rotation tab, shown in Figure 22-7. The X, Y, and Z controls let you rotate the object

in three dimensions. This allows you, among other things, to rotate text to any angle, as well as to rotate the text vertically and horizontally. The latter two dimensions let you display text upside down and/or backward, as needed.

FIGURE 22-6

The Shape Styles gallery provides a live preview of the selected object as you mouse over the different shape options.



You can also rotate floating WordArt using the rotation handle shown in Figure 22-7. Hover the mouse over the rotation handle until the rotation icon appears. Then click and hold the mouse's left button. Continue holding the mouse button and move the pointer out a short distance from the handle. The mouse pointer now turns into the circle of four arrows shown in Figure 22-8.

For more definitive rotation, hold the shift key as you rotate. The object now moves in 15-degree increments.

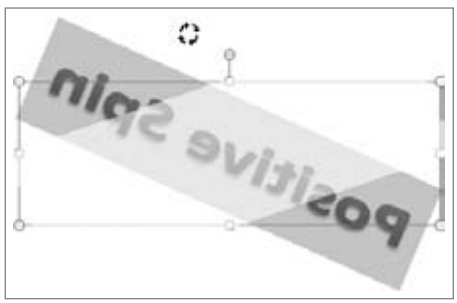
FIGURE 22-7

Rotation controls give you the ability to display WordArt in virtually any position.



FIGURE 22-8

WordArt can be rotated with the rotation handle.



Size

Also shown in Figure 22-7 are eight sizing handles. Use these handles to drag the sides and corners of the WordArt to achieve the desired size. The alt and control keys modify the effects of dragging the sizing handles as follows:

- **Plain (neither alt nor control):** Dragging expands or contracts smoothly
- **Alt:** Resizes in discrete increments using Word's internal grid as a guide
- **Ctrl:** Resizes symmetrically

Even with these super-duper bulleted descriptions of the effects of the keys on dragging, resizing WordArt is something best experienced directly. Go for it, and remember Ctrl+Z.

Tip

By default, Word does not create a border around WordArt textboxes. When you resize by dragging, therefore, you do not get visual feedback about exactly what's happening. If you temporarily (assuming you don't need it permanently) add a shape outline, you'll be better able to see where you're dragging and what happens. In the Drawing Tools Format ribbon tab, choose Shape Outline and click any non-white color (assuming your background is white) to add an outline. When you're done sizing, remove the outline by choosing Shape Outline ➪ No Outline. ■

You can also resize using the Size tools at the right end of the Drawing Tools Format ribbon. For additional options, click the Layout Size launcher at the lower right corner of the Size section of the ribbon, which displays the Size tab of the Layout dialog box, shown in Figure 22-9.

FIGURE 22-9

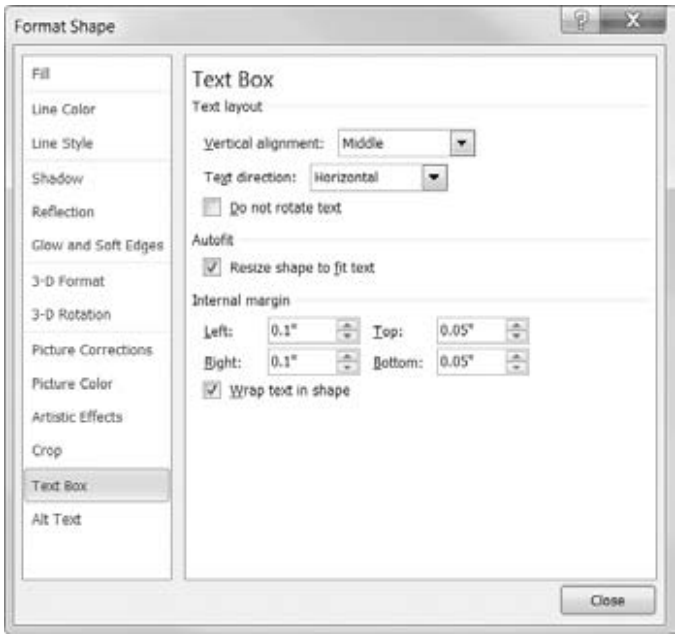
Use the Size tab in the Layout dialog box to set the precise size, rotation, and other aspects of the WordArt textbox.



Two other controls that are useful in working with WordArt textboxes are found in the Format Shape dialog box's Text Box tab, shown in Figure 22-10.

FIGURE 22-10

Use the Text Box tab in the Format Shape dialog box to control whether text rotates, as well as auto-resizing, text wrapping, and internal margins.



Note

If you have difficulty achieving correct centering of text inside a WordArt textbox, take a look at standard formatting settings, such as Format Paragraph's alignment, indentation, before and after spacing, and line spacing. ■

Arrange

The Arrange tools, shown in Figure 22-4, are used to set the position, wrapping, alignment, grouping, and rotation of WordArt textboxes (and other shapes as well). These are covered in full in Chapter 26.

Note that Bring Forward and Send Backward are not available if the WordArt textbox's Wrap Text setting is "In line with text." These control the depth of the WordArt object in the document layers. "In line with text" puts the WordArt object at the same depth as the text, so forward and backward (or on top of and behind, which to me are more descriptive), make no sense. Graphical objects can not only be on top of text, but on top of other graphical objects as well.

Shaping and Transforming WordArt

When you first click the WordArt Styles gallery, you might be wondering "OK, but what happened to all the funny shapes you could create in Word 2007 and earlier?" That's sure what I thought . . . until I discovered the Transform gallery.

Go ahead and create a WordArt object. I'll wait. Done? Good. Now, with the WordArt object selected, click Text Effects ➪ Transform, and hover over the different shapes provided. When you click one you'll notice that the WordArt object will have sprouted one or more additional controls — purple diamonds. These controls are used to do the shaping or warping of text inside the WordArt textbox. You might call this the warp engine. Or not.

As shown in Figure 22-11, as you drag the warp engine a diagram appears showing a preview of the shape. When you like what you see, release the mouse button. Figure 22-12 shows a small sampling of the effects you can create.

FIGURE 22-11

Use the purple diamond to control the amount of warping in WordArt text shapes.

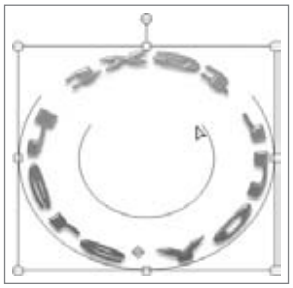
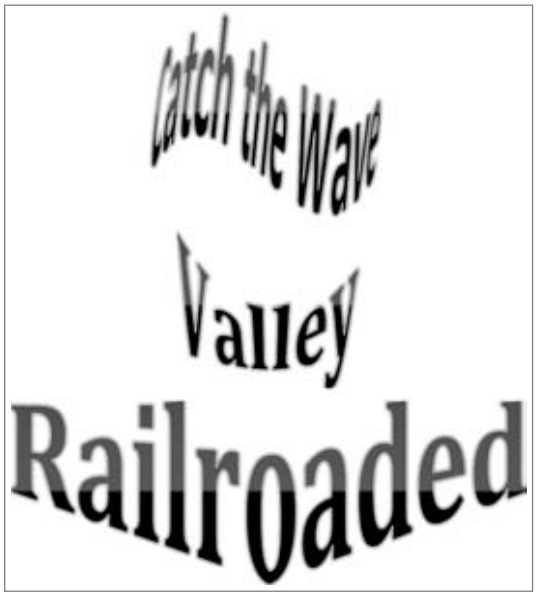


FIGURE 22-12

With practice you can use the Transform gallery to achieve a variety of effects similar to those you can create using classic WordArt.



Additional Tricks

This chapter would be remiss if it failed to point out that there is an almost infinite variety of ways to manipulate WordArt, including ways that might never occur to you. It's simply a matter of experimenting and seeing what works.

For example, if you drag the bottom middle sizing handle of a WordArt object so that it's above the top middle handle, and then release the mouse button, the WordArt object will now be upside down! If you drag the left middle sizing handle so that it is to the right of the (former) right sizing handle, the text will be turned backward. If you drag from the top left corner past the bottom right corner, the text will now be upside-down and backward.

Another pointer is that when you're trying to discover the effects of different tools and settings, sometimes bigger is better — at least initially. Rather than gently nudge a slider or some other setting a little, which might not immediately reveal what the tool or setting does, give it a more solid push. Once you've seen what a control does, use Ctrl+Z to get back to where you started, and then nudge as needed. (If you're a doctor or a pharmacist, however, please don't apply this technique to setting medication dosages.)

Summary

In this chapter you've seen the wide range of things you can do with WordArt. Practically anything you can imagine, you can do — although you would need to resort to classic WordArt in order to achieve a full range of text-shaping capabilities. It's simply a matter of tapping the right controls. You should now be able to do the following:

- Create a masthead banner for a newspaper or newsletter
- Create text that is upside down, sideways, and even backward
- Bend and curve text in creative ways to help make a point in a flyer
- Apply different colors to WordArt to blend with other artistic aspects of your publication

CHAPTER 23

Charts

Off the charts? In uncharted territory? Maybe. Office 2010's chart features certainly expand the boundaries, frontiers, and horizons of how you can visually present data. Office 2010 provides a gallery of over 70 charts that look pretty darn nifty even before you add your touch.

As if that weren't enough, there are galleries of chart layouts, chart styles, backgrounds, labels, shapes, and other effects you can apply to tweak your charts to perfection. When you get everything looking exactly as you want it, you can save it as a template for next time.

Sound good? It is, but there's a slight catch. The new and improved chart capabilities don't really belong to Word. They belong to Excel. Excel is quite generous and will let you use its capabilities in Word, but you do need to have Excel 2010. Without it you can still do charts, but they're not nearly as fancy and cool as what you can achieve if you have Excel.

In this chapter, we'll look at Office 2010's powerful charting capabilities (which were introduced in Office 2007), but we'll also take a quick look at what might be the best argument ever for investing in a version of Office 2010 that includes Excel — Microsoft Graph.

IN THIS CHAPTER

Office 2010 charts

Office 2010 charts versus Microsoft Graph

Chart templates

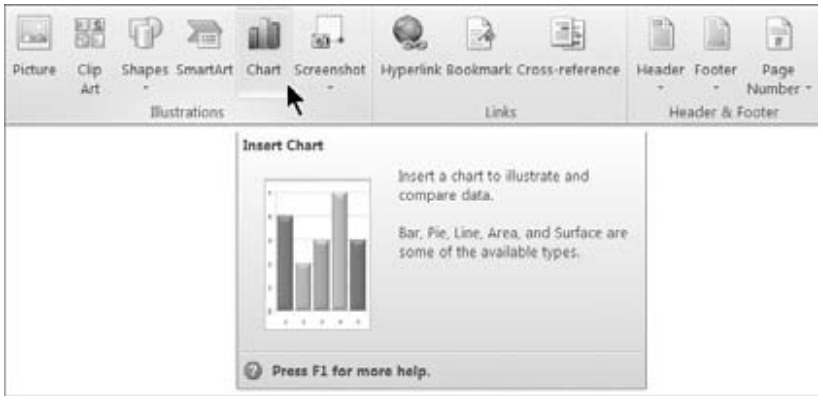
Chart design, layout, and formatting

Excel versus Microsoft Graph

When you hover the mouse over Chart in the Insert ribbon, as shown in Figure 23-1, the initial look suggests that you're on the precipice of yet another impressive Office 2010 graphics feature. Indeed, if you have Excel 2010 in addition to Word 2010, that's exactly correct. If you don't have Excel 2010, however, you're about to be treated to Microsoft Graph, Word's venerable OLE (Object Linking and Embedding) client application that can create simple charts and graphs.

FIGURE 23-1

Insert ➪ Chart is the gateway to either MS Graph or Excel 2010.



If you don't have Excel 2010, or if you insert a chart while working in compatibility mode, Word defaults to using Microsoft Graph. If it looks like something from Word 2003 or even as far back as Word 6, your eyes are not deceiving you. Word opens Microsoft Graph and inserts a starter graph and datasheet, as shown in Figure 23-2 — just as it's been doing since Word for Windows 6. The resulting charts are serviceable, but lack the punch and flash of what you can do when using Office 2010's full potential.

If you do have Excel 2010, when you click Chart, Word displays the Insert Chart dialog box shown in Figure 23-3. This chart gallery provides ready access to more than 70 different charts, arranged into 11 different categories, suitable for presenting a variety of different kinds of data for visual analysis.

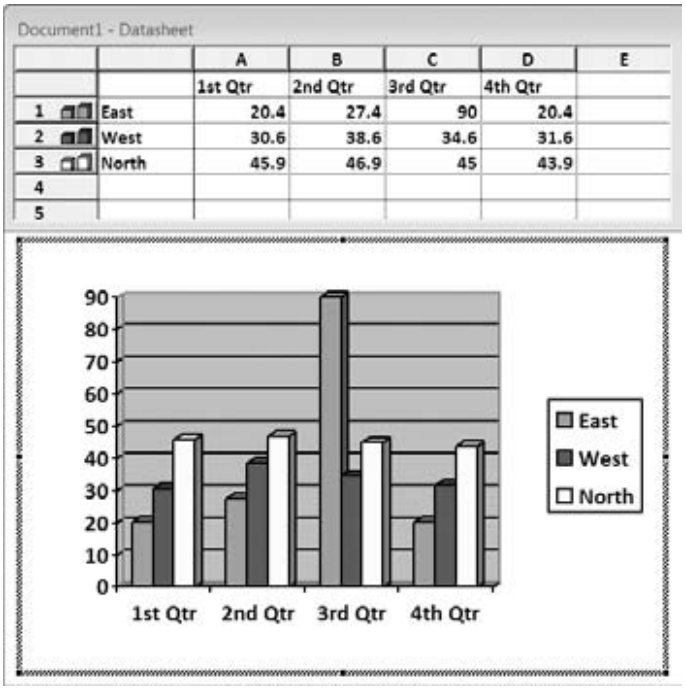
What If I Prefer Microsoft Graph's Simplicity?

If you prefer Microsoft Graph's simpler interface, without the dizzying assortment of options, it's yours for the asking. As mentioned earlier, Word uses it by default if you don't have Excel 2010 or you're working in compatibility mode. In addition, you can access Graph by choosing Insert ➪ Object ➪ Object ➪ Create New tab, and setting Object type to Microsoft Graph Chart ➪ OK.

Once the chart exists in your document, you can double-click it to access Graph's window (refer to Figure 23-2). Although `Graph.exe` is a separate program, it can work only within another application such as Word, Excel, or PowerPoint. Yes, they too can take a trip down memory lane in precisely the same fashion.

FIGURE 23-2

Without Excel 2010, Word defaults to Microsoft Graph, mostly unchanged from previous versions.

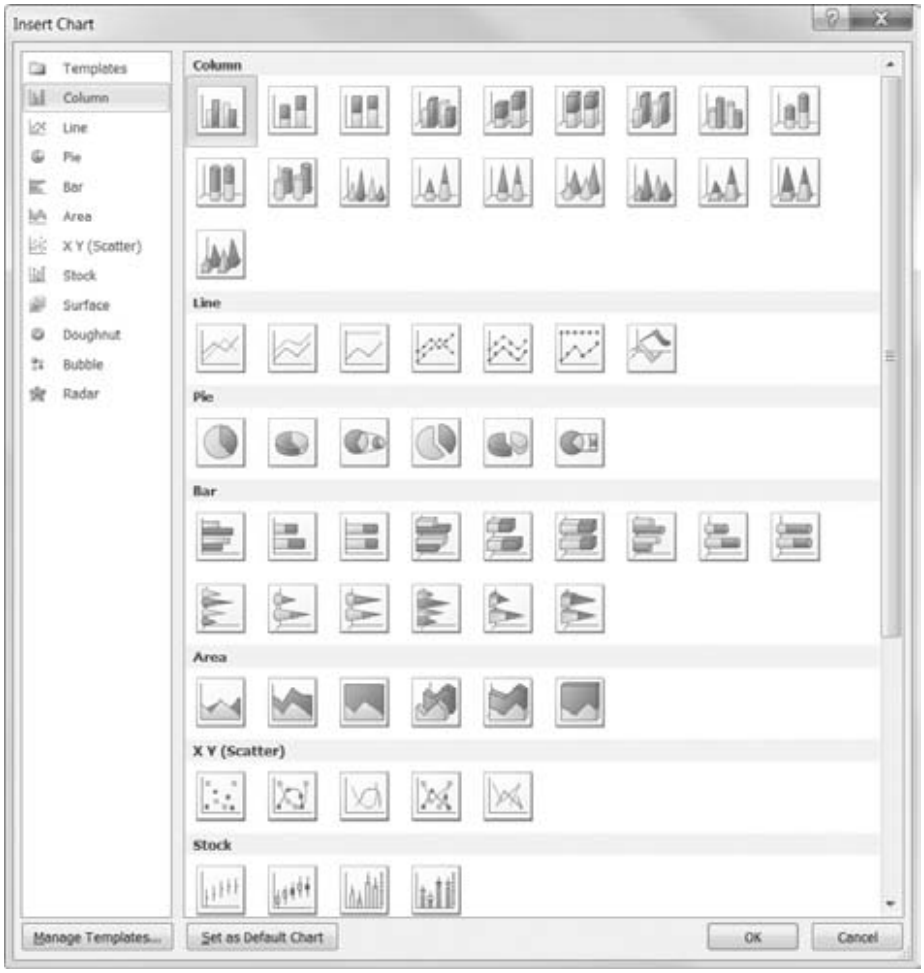


It's not all just memory lane, by the way. Sometimes simpler is, well, simpler. If you don't need something fancy, then perhaps Microsoft Graph is more than adequate. Additionally, when you use Microsoft Graph, there is at least one advantage: Graph readily uses an existing Word table that contains data. If you select the table and invoke Graph, it automatically uses your data for the graph. If you try the same thing using Office 2010's charting feature, it will ignore the selected data and insert the new chart either into your table or in some other area that isn't exactly useful. You will need to copy your data from the Word table and paste it into Excel before it can be used in one of the new style charts.

A major complaint? Perhaps not. However, if you're used to some of the conveniences of Microsoft Graph, don't expect the new charting features to play by the same rules. It's a new game, with different rules, and you'll need to learn them to avoid surprises.

FIGURE 23-3

Excel's Insert Chart dialog is shared by Word and PowerPoint 2010.



Can I Convert from Microsoft Graph to Office 2010 Charts?

Nope, it can't be done, but let's try it anyway. In a document that contains a Microsoft Graph object, click outside the Graph object so that the object is not selected. Right-click the Graph object and choose Chart Object ➪ Convert. Wow — are you excited?

In the Convert dialog box, notice the Convert To format. Yes. That's right. Word is now offering to convert that Microsoft Graph Chart into a, um, er, well . . . into a Microsoft Graph Chart. As you can see, this isn't exactly the most useful exercise to pursue. It's like taking that gasoline engine in your car and converting it into a gasoline engine.

In short, if you have an existing Microsoft Graph object you prefer in the new format, about the best you can do is copy data from its datasheet to the clipboard for use in a new chart object. But look at the bright side. Now you get to play with the new feature and can compare the old chart with the new.

Chart Basics

To insert a new Office 2010 chart, choose Insert ➪ Chart. In the Insert Chart gallery/dialog shown in Figure 23-3, hover the mouse pointer over the different templates shown. Note that the tooltip indicates the name of the gallery template item, sometimes suggesting possible applications. Click the template that best suits your data and the point you're trying to make, and click OK. If you don't like the result, you can change your mind later.

The chart is inserted at the current position in Word, as shown in Figure 23-4. Notice that the Chart Tools group features three separate ribbons: Design, Layout, and Format.

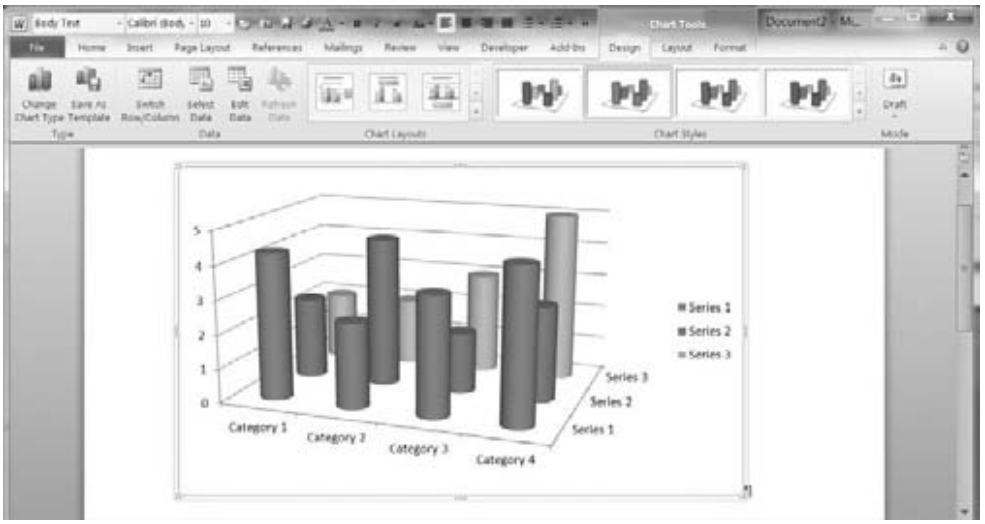
The process also creates a made-up starting data source in Excel. We'll look at data issues shortly.

Design Ribbon

The Design ribbon, shown in Figure 23-4, is where you make the major decisions that determine overall design, data, layout, and style. It makes sense to make the major decisions about data presentation first, and then tweak as necessary.

FIGURE 23-4

When you insert a chart, Office 2010 provides a simple but fictitious data set to go with it.



Type

If you're not satisfied with the overall type of your chart, you can change it. In the Design ribbon, click Change Chart Type. You again are presented with the dialog shown in Figure 23-3. Now, however, it sports a different name: Change Chart Type. While this dialog looks identical in most respects (except for the title bar) to the one you encountered when you inserted the chart, there is one essential difference.

When you first create a chart, samples shown always use an appropriate data set. Therefore, when you click fundamentally different kinds of charts, the underlying data changes. This time around, however, your new chart type uses the data already displayed in Excel — even if that data is inappropriate for the selected type of chart. It does this for several reasons. Most important, there is no wizard driving the process, so you can do things in whatever order suits you. Therefore, Word doesn't "know" whether the data set in Excel is the original made-up data, or if you have now substituted your own actual data. Also important, however, is that you can see the different effects of changing the overall chart type while the data remains unchanged. This lets you know whether a given chart type is appropriate for the data you have. If it's not, it will presumably stick out like a sore thumb.

At the end of the process, when you achieve a chart design that you like, and perhaps one that you might want to use in the future, click Save As Template (in the Chart Tools Design ribbon tab) to save it. Choose an informative name that makes sense, and be consistent and systematic. Someday when you have hundreds of chart templates, you'll be glad you did. Once you've saved chart templates, you can use them for new charts. In the Insert Chart dialog or the Change Chart Type dialog, above the list of different chart categories, click the Templates folder icon to see all the user-created templates.

Note

Chart templates are saved as `.crtx` files in the `C:\Users\`*`user`*`\AppData\Roaming\Microsoft\Templates\Charts` folder. Even though they have pretty-looking default icons, they are not assigned any default program association by the Office 2010 installation/setup program, and cannot be edited or otherwise opened by Word or Excel. ■

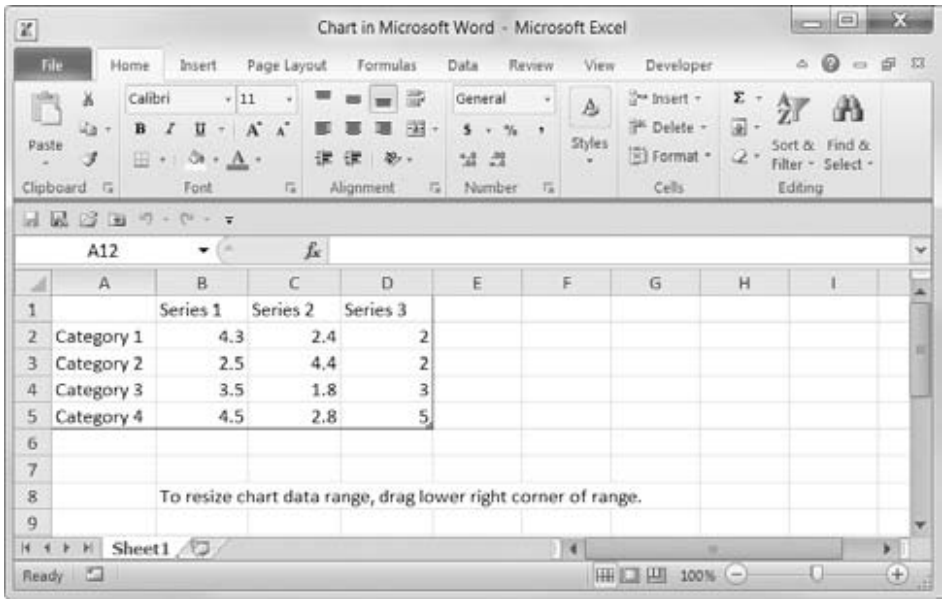
Data

As indicated previously, when you first insert a chart, Office supplies a fabricated data set so that the chart has some substance. As shown in Figure 23-5, this is a very basic data set that enables the inserted chart to appear. There are different data sets for some specialized chart types. What matters initially, however, is the chart type, not the data, that gives the chart life, which is a phony life, devoid of meaning. Please, and this can't be emphasized enough, do *not* forget — accidentally or otherwise — to replace the phony data with real data. It can be very embarrassing if you don't, not that I know this from firsthand experience. No, sir. Not this writer. Nope. That's my story and I'm sticking to it.

To change the data from within Word, click Select Data in the ribbon. Office highlights the current data set in Excel, and displays the Select Data Source dialog box, shown in Figure 23-6.

FIGURE 23-5

When you insert a chart, Office 2010 displays a fake data set in Excel. Don't forget to replace the fake data with real data!

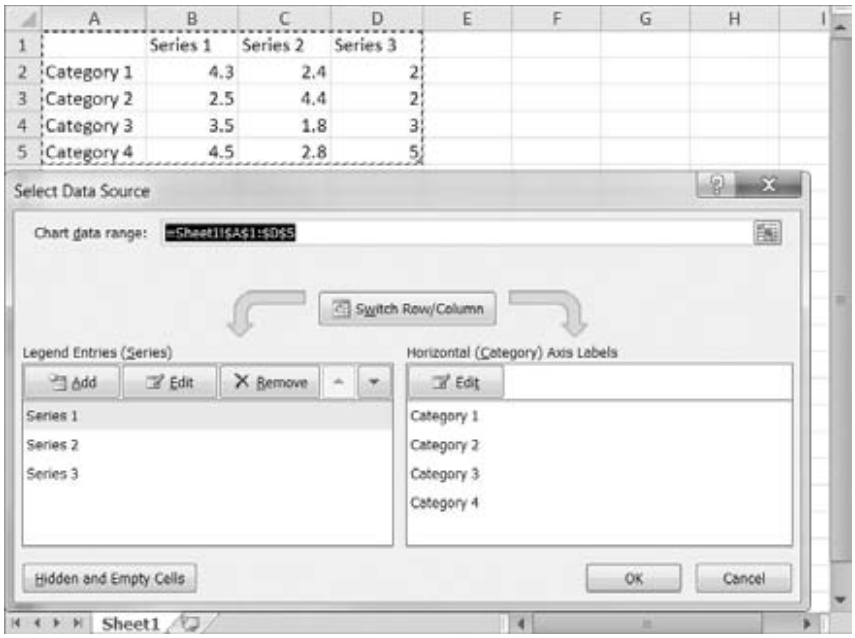


Select Data Source options are as follows:

- **Chart data range:** Specify the range of the worksheet that is used by the chart as data.
- **Switch Row/Column:** Exchange the vertical and horizontal axes in the chart. For example, as shown in Figure 23-5, Series 1 through 3 are across the top, and Categories 1 through 4 are on the side. Switch Row/Column puts Series on the side, and Categories along the top.
- **Add:** Add a new data series (a fifth quarter, perhaps?) to the chart.
- **Legend Entries Edit:** Make changes to the currently selected data series.
- **Remove:** Exclude the selected data series from the chart.
- **Move Up/Move Down:** Use the buttons to move the selected series in the chart.
- **Horizontal Edit:** Edit the horizontal category labels.
- **Hidden and Empty Cells:** Click to see and control hidden and empty cells so you can decide how to handle them (hide them or leave gaps).
- **OK:** Apply the changes to the chart.

FIGURE 23-6

Larger issues can be handled in the Select Data Source dialog box. Use Excel itself for editing data.



Select Data Source options are described in Excel's Help file. If you can figure them out, you're doing better than most. For quicker results and less frustration, skip the Select Data Source dialog box and read the following tip.

Tip

If you find the dialog box hopelessly unintuitive, obtuse, and needlessly jargon-laden, you can dismiss the Select Data Source dialog box and modify the data directly. Click the Excel spreadsheet and make the changes needed. Change the row and column headings, or the data itself. Add any new rows and columns as needed. Ordinarily the chart automatically reflects these changes. If it doesn't, then right-click the chart and choose Select Data Source again (to redisplay the dialog box). Select the cells you want included in the chart, and then click OK in the Select Data Source dialog box. ■

To display the data table without displaying the Select Data Source dialog box, click Edit Data in the Data section of Word's Design ribbon. Under ordinary circumstances the Refresh button will almost always be grayed out. However, if the data set is edited outside of the chart (for example, if you didn't click Show Data, or if you replaced the data set with a newer version sent to you by someone), then click Refresh to reconnect the chart and the Excel data set.

Chart Layouts

Chart layouts, in the Design ribbon, provide a varying number of different layouts for each chart template. To apply a new chart layout, click the More button at the bottom of the Chart Layouts vertical scroll bar to expose the entire set, and click a layout to apply it. Note that chart layouts do not have live preview, although you can roll the palette up and to the left to show more of your document as needed.

With creative names like Layout 1 through Layout 10, the names aren't going to suggest how they might be applied, so you might need to apply each one to get a sense of what they all look like in action. However, if you do this for each chart type, you could be doing it for quite a while, as the chart layouts vary, often even within the overall chart type.

For example, Clustered Column, the first chart type in the Insert Chart dialog (refer to Figure 23-3), has 11 chart layouts, as shown in Figure 23-7, while the fifth chart type, Stacked Column, has 10 layouts, as does 3-D Cylinder. Each of the seven different line charts has 12 layouts that can be applied. One is reminded of the poem "As I Was Going to St. Ives."

FIGURE 23-7

Each different chart type has a different number of associated chart layouts, selectable from the Design ribbon.



Clustered Column | 3-D Cylinder | Stacked Column

We're not going to count them all up here. However, given that there are more than 70 different chart types, and each chart has somewhere in the vicinity of eight to 12 layouts that can be applied, the effective number of different chart formats is at minimum over five hundred.

Chart Styles

Chart Styles, the rightmost chunk in the Design ribbon, has 48 different variations of color and texture you can apply to each overall chart. Mercifully, you'll be able to decide mostly on the basis of color, because each style has a basic overall color impact. Unfortunately, this tool lacks live preview, so you'll need to click to see the result.

The palette can be rolled up and to the left to show more of the document. Additionally, you can use the Chart Styles vertical scroll bar to display up to eight styles at a time (possibly more, depending on your screen resolution) without exposing the entire gallery, which makes different styles somewhat easier to sample. As indicated in Figure 23-8, Chart Styles names enjoy the same burst of creativity used to name the different Chart Layouts, so you'll have names like Style 7 and the ever-popular Style 48 to inspire you.

FIGURE 23-8

There must be 50 (minus two) ways to style your chart!



If you're keeping a running tally, you can now take the number of chart type and chart layout permutations and multiply it by 48. This means that without ever leaving the Design ribbon, you could be looking at a minimum of over 24,000 different chart formats. Recall that earlier it was suggested that the variety available might make you long for the simplicity of Microsoft Graph? This is why. If you manage employees who use Word to make charts and it suddenly starts to take them a lot longer to do their job, the problem isn't that it's more difficult in Word 2010. The problem is that the candy store has gotten a lot bigger.

Layout Ribbon

If the Design ribbon is a candy store for overall charts, the Layout ribbon is a mega candy store for the individual components of charts. As shown in Figure 23-9, the Layout ribbon's six groups provide myriad controls for fine-tuning your charts.

Current Selection

Use the Current Selection tools to apply or remove custom formatting from selected chart elements. Use the Chart Elements drop-down tool to select the part of the chart you want to

change. This can be handy if you have difficulty clicking to select what you want to select, or if you aren't sure what the different parts are called. With the chart element selected, you can use one of the live preview tools, or you can click Format Selection to use dialog box formatting controls. Click Reset to Match Style to remove custom formatting from the selected chart element.

FIGURE 23-9

The Layout ribbon provides six different sets of tools for enhancing your charts.

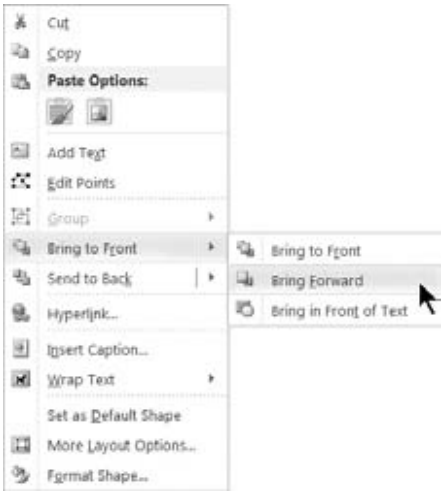


Insert

Use the Insert tools to add additional elements to your charts. Using wrapping styles other than In Line with Text (In Front of Text and Behind Text work best for these kinds of elements), you can add pictures, clip art, and textboxes to your charts. To change a graphic's relative layer, right-click it and choose Bring to Front or Send to Back, and then choose the desired direction or location, as shown in Figure 23-10. Note that not all of the Layout tools are going to be available for each chart type.

FIGURE 23-10

When adding pictures, clip art, shapes, or textboxes on top of other graphics, use Bring to Front and Send to Back to control the relative positions.



Labels

Use the Labels group to turn text elements in a table (chart title, axis titles, legend, and data labels) on and off. You can also use these controls to select basic options concerning position and overlay (whether a given element overlaps with other elements). Use the Data Table tool to determine whether to also show the data source table in the main document. Using data labels often provides a more utilitarian alternative to showing the data source table, assuming that the numbers are simple enough that the labels are legible and don't look too cluttered.

To edit label text such as titles, click in the respective textbox and make the desired changes. Click outside the textbox when you're done. To change axis elements that originally came from the data source table in Excel (for example, Series 1, Series 2, Category 1, and Category 2, as shown in Figure 23-5), you need to edit them at the source. In the Data group of the Design ribbon, you would click Show Data.

Axes

Use the Axes tool in the Axes group to control the overall appearance and location of the horizontal and vertical axes. Combine these controls with the Axis Titles control in the Labels group to "negotiate" the precise axis appearance you want.

Use the Gridlines tool to turn major and minor horizontal and vertical gridlines on and off. To control the colors and styles of gridlines, drill down to Gridlines ➪ Primary Horizontal Gridlines ➪ More Primary Horizontal Gridlines Options or the vertical equivalent.

Background

Use the Background tools to change different aspects of chart background and perspective. Note that background tool availability varies considerably by chart type. Plot Area, Chart Wall, Chart Floor, and 3-D View are available only for charts that employ those elements. For example, Plot Area will be available only for charts that display plotted elements, such as lines and bubbles. If any of these elements are grayed out, nothing you do, short of changing the overall chart type, is going to make those elements available.

For elements that are available, options are pretty extensive. For example, you can set a background picture for the chart's plot area, wall, or floor. To do this for plot area background, for example, choose Plot Area ➪ More Plot Area Options. In the Format Plot Area dialog box, shown in Figure 23-11, select the Fill tab.

Here, you can set the fill to "No fill," "Solid fill," "Gradient fill," "Picture or texture fill," or "Pattern fill." Use the drop-down Texture control if you want a texture. Use the File, Clipboard, or Clip Art buttons to choose the desired backdrop for the plot area. For example, if you're plotting milk consumption, you might want to use a cow as a backdrop. Moo.

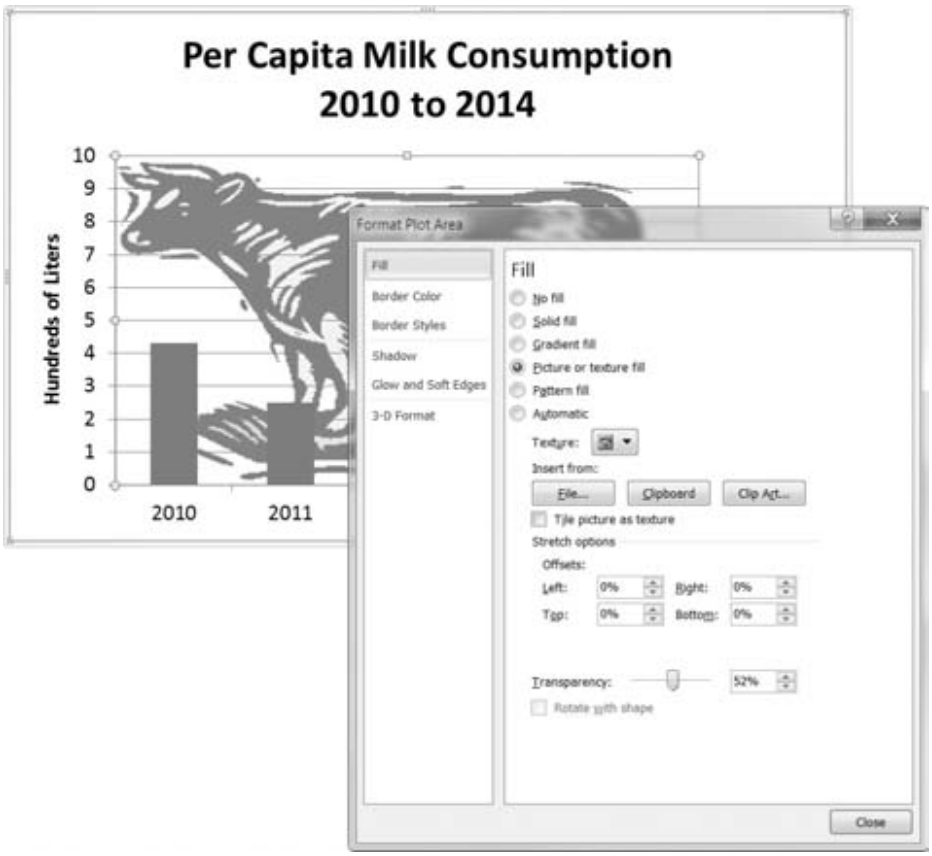
Analysis

Of the various chart tools available, this is one of the coolest. Depending on the chart type and the available data, the Analysis tools can actually compute and superimpose certain kinds of analyses onto your charts. As shown in Figure 23-12, for example, you can superimpose trend lines

to compare different growth models with actual data. Note that not all the Analysis options are available or appropriate with all chart types. However, given the right data and chart type, you can do some pretty amazing things that Microsoft Graph can't even dream of (well, naturally, since it can't dream, but that's beside the hyperbolic point). In addition to adding trend lines to line graphs, they sometimes make sense superimposed over bar graphs. A little bit of experimentation can yield surprising insights.

FIGURE 23-11

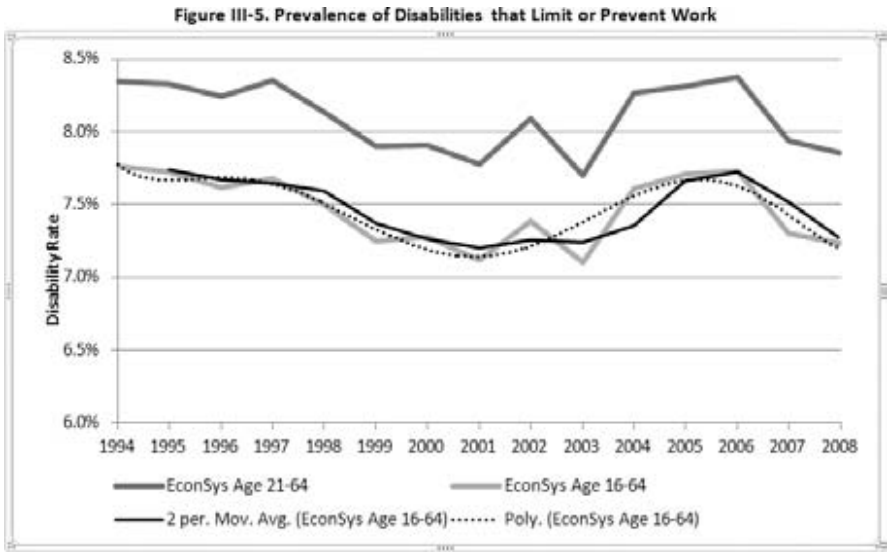
Choosing a relevant picture for a chart background can liven up an udderwise boring chart.



To impose an exponential trend line onto a chart, for example, with the chart selected, choose Layout ➪ Trendline ➪ Exponential Trendline. Word uses the starting and ending data points to plot an exponential growth curve between those two points, and plots the intervening point. In Figure 23-12 we've contrasted a two-period moving average and a six-degree polynomial. Most trendline options aren't available from the Trendline tool in the Chart Tools Layout ribbon tab. Instead, right click the line in question (in the graph), and choose Add Trendline. The Format Trendline dialog box appears, offering six types of Trend/Regression lines.

FIGURE 23-12

You can superimpose trend lines onto your charts to compare growth theories to actual data.



Format Ribbon

Tools on the Format ribbon, shown in Figure 23-13, should look somewhat familiar. Except for the first group, Current Selection, this ribbon is identical to the SmartArt Tools Format ribbon discussed in Chapter 18 under "SmartArt Formatting." You've also seen the WordArt Styles in Chapter 22, under "WordArt Styles." New to you in this ribbon is the Current Selection section.

FIGURE 23-13

The Chart Tools Format ribbon is nearly identical to the SmartArt Tools Format ribbon, shown in Figure 18-28.



Current Selection

The Current Selection tools are pretty handy to have when chart terminology starts to confuse you. Looking back to Figure 23-9, are you quite sure what the chart wall and chart floor are? While you might have a pretty good notion, it's sometimes not entirely clear what's what. What about the different axis areas? Do you know what everything there is called?

Not that the names themselves are important. Rather, sometimes Word asks you what you want to do with the Horizontal (Category) Axis, the Chart Area, or the Side Wall, and it's hard to know exactly what you want to do unless you know exactly what Word is talking about.

If you've ever wondered, wonder no more. The Current Selection tool is at your service, shown in Figure 23-14. The Current Selection group has three tools, designed to work together.

Chart Item Selector

The chart item selector is the drop-down list at the top of the Current Selection group in Figure 23-14. It works in two ways. First, you can use the drop-down arrow to instantly select any of the items shown. This list will vary depending on the number of different elements in the chart. Second, when you click any item in a chart, this tool changes to reveal the name of the selected part.

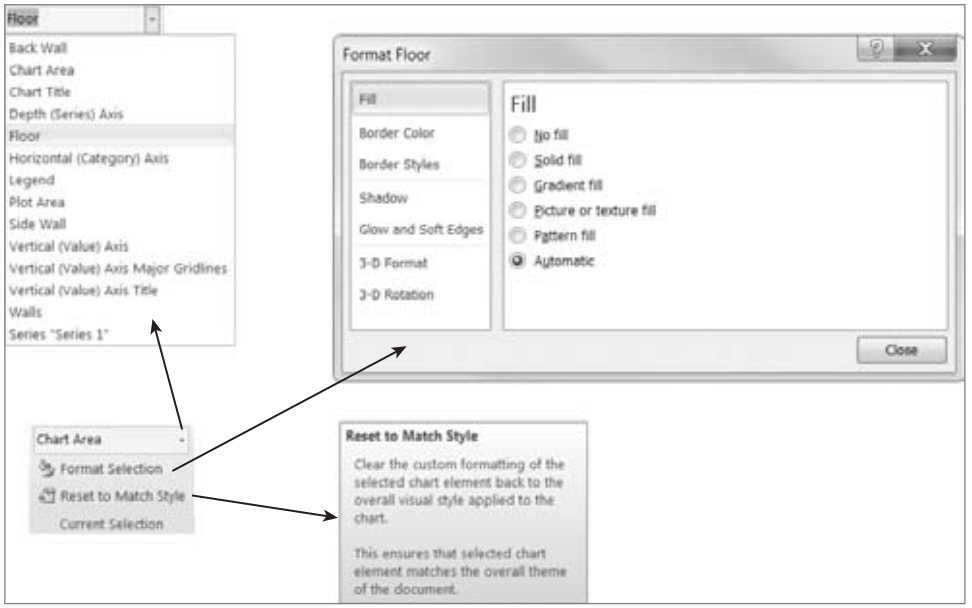
Once a part is selected, you can use the Format Selection tool to use a dialog box to control the formatting of the selection. Alternatively, you can use any of the applicable tools shown in the Chart Tools Format ribbon, for direct (and sometimes live preview) formatting.

Format Selection

This tool is also context-sensitive. It uses variations of the Format Shape dialog shown in Figure 23-14 (shown as Format Floor here, and shown as Format Plot Area in Figure 23-11) to provide access to each of the chart's many different parts.

FIGURE 23-14

Use the Current Selection tools to quickly modify any part of a chart.



Reset to Match Style

Shown in Figure 23-14, this tool is used to reset the selected part(s) of the chart to the overall visual Chart Style applied to it (see "Chart Styles" above, in the discussion of the Design ribbon). If you've gone astray in your formatting such that the visual elements no longer look coordinated, use this tool to re-harmonize. Note that this will revert the selection to the original formatting applied when you initially selected a template from the Insert Chart dialog, unless you have applied a Chart Style from the Design ribbon.

Summary

In this chapter you've seen Office 2010's charting features in action. You've seen the difference between Microsoft Graph and Office 2010 Chart and learned the main difference: simplicity versus endless possibilities. You should now be able to do the following:

- Use Word 2010's Object feature to use Microsoft Graph, if needed
- Insert an Office 2010 Chart and use the Design, Layout, and Format ribbons to achieve just the right look
- Apply analytical overlays to some charts to highlight trends and reveal analytical insights
- Save a carefully crafted chart as a template for future use
- Use the Current Selection tools to quickly identify and format any chart part

CHAPTER 24

Inserting Objects and Files

Using a technology known as object linking and embedding (OLE), you can create multimedia and multidimensional documents that incorporate components from a variety of different programs — and not just Office applications. A single document, for example, might contain text from Word, data and charts from Excel, and sounds or video clips from some other program. This chapter explains how to use the tools provided in Word to accomplish this feat, combining information and capabilities from a wide variety of Windows programs that support OLE.

This chapter also describes how you go about inserting files, whether as objects or simply as additional sources of text and other document fodder. As you will see, sometimes inserting a file is the best way to achieve particular objectives.

IN THIS CHAPTER

- **What are objects?**
- **Linking versus embedding**
- **Inserting text from files**
- **Pasting, dragging, and dropping objects (and other things)**

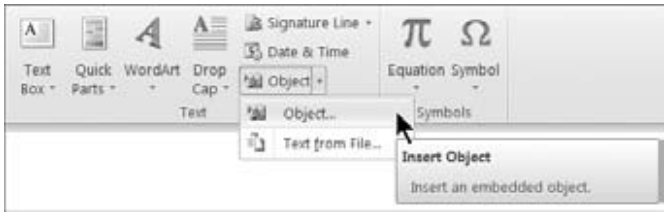
Object Basics

An object can be thought of as a unit of information that comes from a specific program. For example, a text selection in Word might be considered an object by Excel or some other program, or even by Word itself under different circumstances. Word tables or WordArt creations can be objects as well, as can Word equations, or even whole Word documents. All or part of an Excel worksheet might be an object, as might a PDF file from Adobe, a MIDI file from a music program, an MP3 from a media player, and so on.

Each different object has associated with it an *owner* or *client* program. That's the program that provides the muscle needed to create, edit, or display/play the object in its original form. For a list of the kinds of objects that can become part of a Word document, in the Insert ribbon, choose Object ➪ Object, as shown in Figure 24-1. Or, if you're careful with the mouse, just click the Object button without clicking the drop-down.

FIGURE 24-1

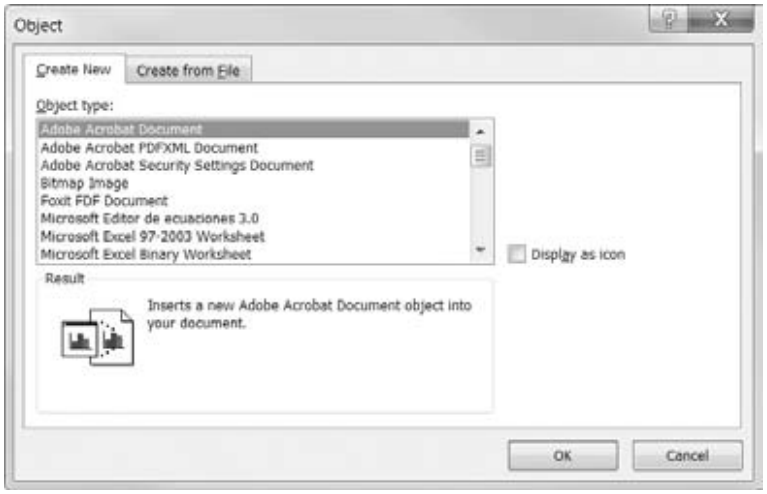
To insert an object, click the Object tool in the Insert ribbon, and then click Object.



Word displays the Create New tab in the Object dialog box, shown in Figure 24-2. What you see listed depends entirely upon what's installed on your computer. The more programs installed, the longer the list of OLE-compatible objects Word is going to display. Many of them you probably won't even recognize, and you might even wonder where they came from. Creating a new object this way and exploring the options available is one way to find out more about the object in question.

FIGURE 24-2

The more programs you have installed on your computer, the more likely you are to have a lot of different object types listed in the Object dialog box.



Linking versus Embedding Objects in Word

When it comes to using bits and pieces of other programs' data in Word, you have two options: linking and embedding. In fact, you've seen the concepts before in this book, although the vocabulary used was different. Consider, for example, the options available when you insert a

picture into a Word document. Once you navigate to the picture, the Insert button's drop-down arrow enables you to choose from among Insert, Link to File, and Insert and Link, as shown in Figure 24-3. Link, obviously, is linking, whereby what you insert remains connected in some way with the original application and file. Insert, less obviously perhaps, is embedding, whereas Insert and Link is both linking and embedding at the same time. And, to answer your question, no, it's not really like walking and chewing gum simultaneously.

FIGURE 24-3

Even within Word, there are close parallels to linking and embedding.



When you link an object, you store that object's location in Word. Later, when you or someone else chooses to "view" the object, Word checks the filesystem to determine which program "owns" that type of file. It then uses that program to open the file. For some kinds of objects, particularly those owned by other Office programs, Word can display the object's content in place, as part of the Word document. For others, the program opens and the object is displayed in the owner program.

When you embed an object, a copy of the object is stored within the Word document. Depending on the size of the object, this can add greatly to the Word document size, and can make Word files unwieldy. Embedding is a way to guarantee that the object is available when using the Word document, though.

As with pictures, the decision to embed versus link is driven by considerations of size, maintenance/updates, and availability. All other factors aside, an embedded object will result in a larger file than an object that is linked. This can create difficulties in e-mailing the Word document, transporting it on small removable media (SD card, CD, flash memory, etc.), or even storing it. However, assuming these issues are not insurmountable — and they are increasingly less so, given the falling cost of storage and the increasing availability of high-speed Internet access — embedding provides assurance that the object's data will be present when needed.

In contrast, a linked-only object will work only if the original object is present and hasn't been renamed. Furthermore, it must be in the same relative location as when the file containing it was created. For example, if the object originally was in the same folder as the file that contains it, location should not be an issue. However, if the object originally was in a folder named Herb's Media, but is now in a folder named Karen's Media, the linked item will not display correctly.

On the other hand, if the original source has changed contents but kept the identical name and folder, a link to it will reflect the changes, displaying the new contents in place of the old when the link is updated.

For example, suppose you want to share some pictures with a colleague. Suppose also that the pictures are contained in an online gallery, and you are making changes to that gallery and items in it, as well as enhancing the pictures themselves. It is a classic "work in progress." If you embed the pictures themselves in a document you send, the recipient will have the pictures you sent when opening the document.

However, if you've made changes in the meantime, your colleague will not be able to benefit from those changes — she will still have what you originally sent. If you link the gallery instead, assuming she has access to where the gallery is stored, she will be able to view the pictures as well as see any additional changes you've made.

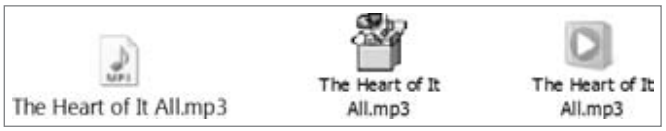
Icons versus Content

When you insert an object into the current file, you have the option to display the content or display only an icon. If you choose the "Display as icon" option, shown unchecked in Figure 24-2, the object will still have functionality — you will be able to double-click it to open the owner application — but you will not be able to see the content inside the Word document.

This option makes sense when Word doesn't have the capability to properly display the contents inside the Word window. You can use the iconic feature to give the document user an idea of what will happen when the object is double-clicked. For example, Figure 24-4 shows three objects that all refer to the same MP3 file. The first was simply embedded; the second was embedded with "Display as icon" checked. From a utility standpoint, the package icon is pretty useless to many of us. It provides no clue about what will happen if the package object's contents are activated — right-click an object and choose Packager Shell Object Object to see the options. Perhaps it should be called a Surprise Package instead!

FIGURE 24-4

Right-click an object and choose Packager Shell Object Object to see the options; Word's default "package" icon doesn't give you an idea of what to expect if you choose Activate Contents. Will the bomb squad show up and try to detonate it?

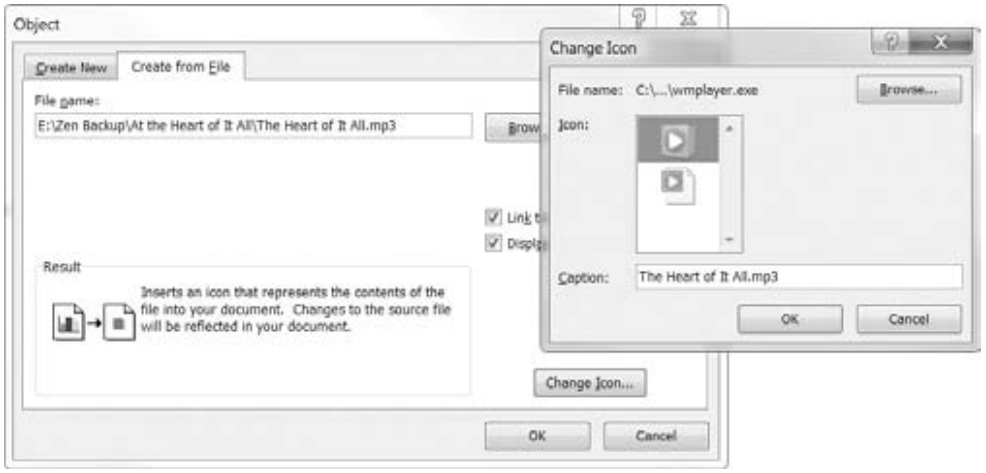


The third icon was inserted the same way as the second, but the Windows Media Player icon was used. Now, the user knows what to expect if the icon is double-clicked. To substitute a more informative icon, choose Change Icon, as shown in Figure 24-5. Click Browse to navigate to the location where the default owner application resides, such as `C:\Program Files\Windows Media Player\wmplayer.exe`. As shown in Figure 24-5,

you often have a choice of icons that are stored in the particular `.exe` file. Choose the desired icon and click OK. Back in the Object dialog box, make any additional choices, and click OK.

FIGURE 24-5

Use Change Icon to put a more informative face on an embedded or linked object.



New versus from an Existing File

As suggested by Figure 24-5, you can create a new object or link or embed an existing file. If you choose to create a new one, you will not be given the option of linking. When creating, Word automatically embeds. If you prefer to link, you need to go through the motions of creating the object, saving it externally, and then linking to it.

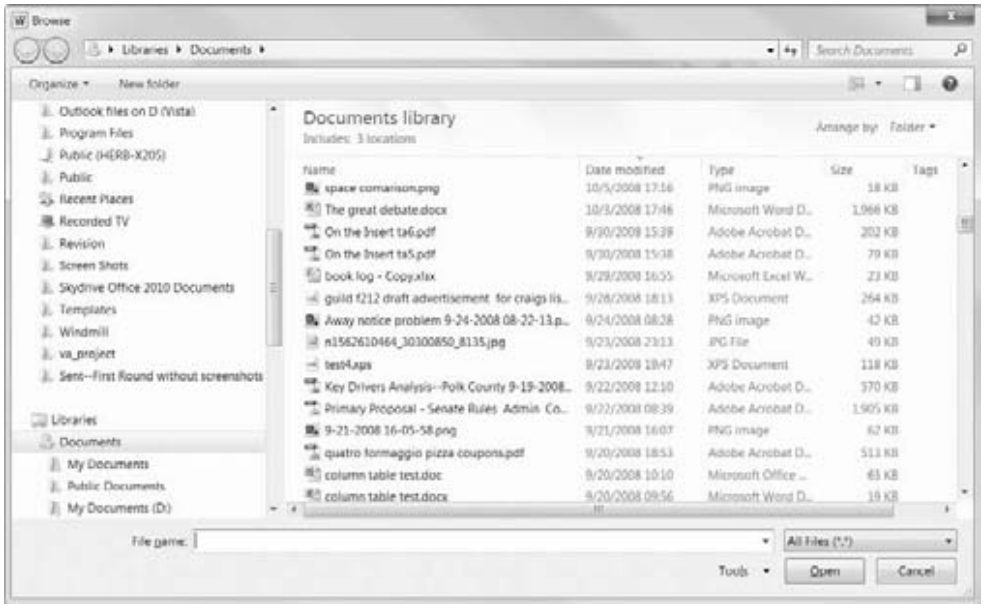
When you choose Create from File, Word provides negligible guidance. There is no list of object types. Instead, all you get is `*.*`. When you click Browse, Word continues to provide no guidance, as shown in Figure 24-6. The only option in the Files of Type drop-down is All Files (`*.*`); so if Word isn't going to tell you what to look for, who is? That's entirely up to you. Any file can be treated as an object. It's up to you to tell Word what file to use. If there is a default handler or owner for that particular file type, then when you double-click it (or right-click and navigate to Activate Contents), control will transfer to that program.

Note

When you insert a multipage document as an object into the current file, only the first page will be displayed, which can be handy if this is exactly what you want. If you want the entire multipage document to display with its original formatting, you need to use a different approach. One way would be to break up the document into separate documents — one for each page. ■

FIGURE 24-6

When you choose the Object dialog box's Create from File option, Word invites you to link or embed *any* file, although not just any file will yield satisfactory results.



Inserting Text from Files

The other option available when you click the Object drop-down arrow, as shown in Figure 24-7, is Text from File. This can be a good option to use when you are pulling together a large document from a variety of other sources. In some cases those other documents might have been written or might be in the process of being written by others.

To insert a file into the current document, in the Insert ribbon, choose Object ➪ Text from File. Navigate to the target file and select it. As shown in Figure 24-8, you can insert the file, or you can insert a link to it.

If the source file is being maintained separately, and might change, then choose Insert as Link so you can update the material in the current document when the source changes. If the source is a finished document and you simply want to incorporate the contents, choose Insert.

Note the additional option, Range. If the source file contains bookmarks or named ranges (as used in Excel), use Range to specify the exact location of the source material.

FIGURE 24-7

In the Insert ribbon, choose Object ➪ Text from File to incorporate another file into the current document.

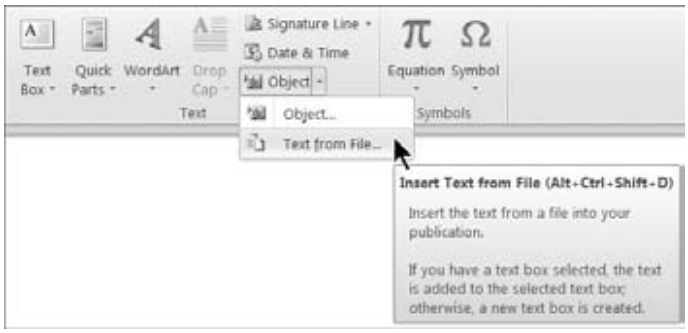
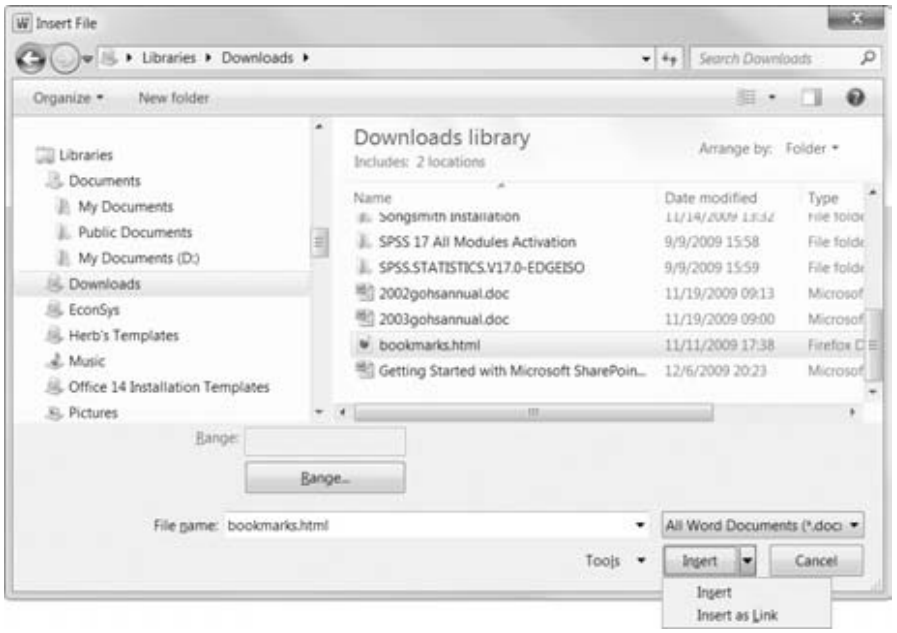


FIGURE 24-8

You can insert a file directly or insert a link to it.



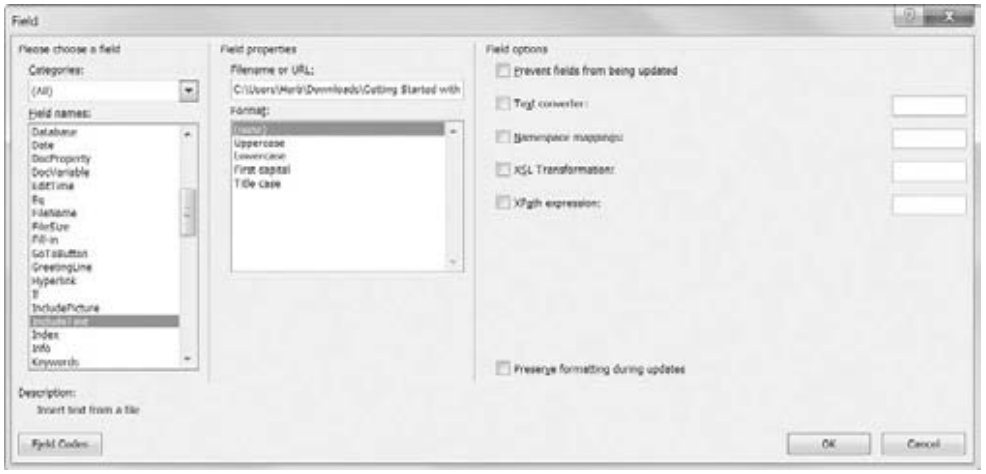
Tip

If you choose Insert as Link, an INCLUDETEXT field code is inserted, rather than the file's text. However, that might be what you want, particularly if the file's contents aren't straightforward. If the source document contains field codes, for example, you likely will want to control exactly what happens when it is inserted into the current file. Therefore, immediately after inserting the link, right-click and choose Edit

Field. As shown in Figure 24-9, you can now adjust the field code options so that the included text behaves as you think it should. See Chapter 21 for additional information. ■

FIGURE 24-9

After inserting a link to a file, right-click the link and choose Edit Field to choose how you want the inserted file's contents handled.



Formatting Issues

When you insert the contents of a file using the Text from File option — whether you insert the actual contents or a link — the styles of the current document are applied to the incoming file. This can be either useful or infuriating.

For example, it's possible for a document template to contain additional formatting information, such as information about paper size, orientation, margins, and other Page Layout settings that are not incorporated in a document's styles. Suppose that you have an existing set of documents that have been written with a particular document template, and you are given a new template to use — one containing both new styles and new Page Layout settings not contained in styles. If you simply attach the new template (Developer ➪ Document Template ➪ Attach), however, even if you enable the Automatically Update Document Styles option, new Page Layout settings will not be incorporated.

Instead, to apply the full authority of the new template, you need to create a new document based on the new template. Then use the Text from File command to deposit the contents of an existing document into the new document. This way the new styles are applied to the old document, as well as additional formatting information that doesn't get applied when you simply attach a different template to an existing document.

Pasting, Dragging, and Dropping

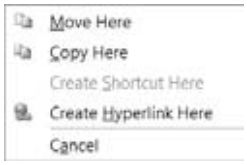
The Object tool on the Insert ribbon isn't the only means of depositing objects into a document. Two additional tools at your disposal are dragging and dropping, and using the clipboard. In fact, most users working with an existing file find the drag-and-drop method to be superior to using the Object tool.

Dragging from the Filesystem

To insert an existing filesystem object into a Word document, open Windows Explorer and navigate to the location of the object (file) you want to use. If possible, position both windows so that you can see the source and the destination at the same time. Using the right mouse button (you'll see why in a moment), drag the object from the Windows Explorer window and drop it into the Word document. You'll then be presented with the options shown in Figure 24-10.

FIGURE 24-10

When you use the right mouse button to drag and drop an object, Word lets you choose a Drop option.



Note that Move Here is a bogus option when you're dragging objects from the filesystem into Word. If you choose Move, Word copies. In other words, the only real options are Copy and Create Hyperlink Here. If you choose the latter, Word creates a standard hyperlink to the object. When you Ctrl+Click on the hyperlink from Word, the default program associated with the file type is opened to display, play, edit, or otherwise handle the file. For many users the hyperlink method is superior to the Insert Object method because it produces a result that is more instantly recognizable to users.

Dragging from Another Open Program

When you drag using the left mouse button from an editable window (for example, another Word window, an open PowerPoint document, or WordPad), what happens depends on what is selected and being dragged.

Dragging Text

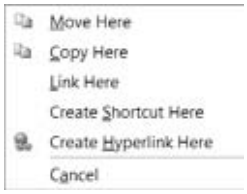
If you drag a text selection, the default behavior is for the item to be *moved* to the target location. Therefore, it is strongly suggested that you make dragging with the right mouse button your

standard default dragging behavior. Even if you *do* want to move the text, it's best to be informed about exactly what will happen.

When right-dragging from one Word document to another, you often will be presented with an additional option or two, as shown in Figure 24-11. Here, notice the two competing options: Shortcut versus Hyperlink.

FIGURE 24-11

Right-dragging text may make additional options available: Link Here and Create Shortcut Here.



If you choose Shortcut, Word inserts an OLE LINK bookmark in the source document, and includes a reference to the filename and the exact location in a LINK field that it creates in the target document. The result in the target document is a Word object (using the Word icon), which you can double-click to open the source location.

If you choose Hyperlink, an HTML/XML-type bookmark is inserted into the source document. A HYPERLINK field is inserted into the target document, with up to the first 255 characters (spaces included) displayed as the hyperlink text. You can then Ctrl+Click the hyperlink to display the source.

The results are similar, but the utility in the target document is a little different. Which method you use should be determined by which one offers you the desired utility and effect.

Dragging Other Objects

What happens when you drag other objects depends a lot on the program and the extent to which that program supports dragging and dropping. You can't just assume that what you want to happen will actually happen — even if the source program is another Office 2010 program.

For example, if you try to drag a graphic from PowerPoint into Word, the result will probably confound and surprise you. Although it appears that the drag is happening — complete with the dragging pointer's showing up in Word — what happens instead is that the drop actually occurs inside the PowerPoint window! The effect can be quite confusing — and destructive — so keep that Ctrl+Z command handy!

If you drag a graphic or other non-text object from Internet Explorer into Word, the results usually are what you want and expect. However, note that you will be able only to right-drag. Dragging with the left mouse button won't work. On the other hand, because Internet Explorer's main display window isn't an editing window (for the most part), there's no concern that the

contents will be *moved* from their web location into the Word window. For additional reassurance, note that the mouse pointer changes into the "copy pointer," shown in Figure 24-12, when dragging from Internet Explorer.

FIGURE 24-12

The copy pointer indicates that a drag will copy instead of move; you can press control while dragging with the left mouse button to ensure that the copy action is selected.



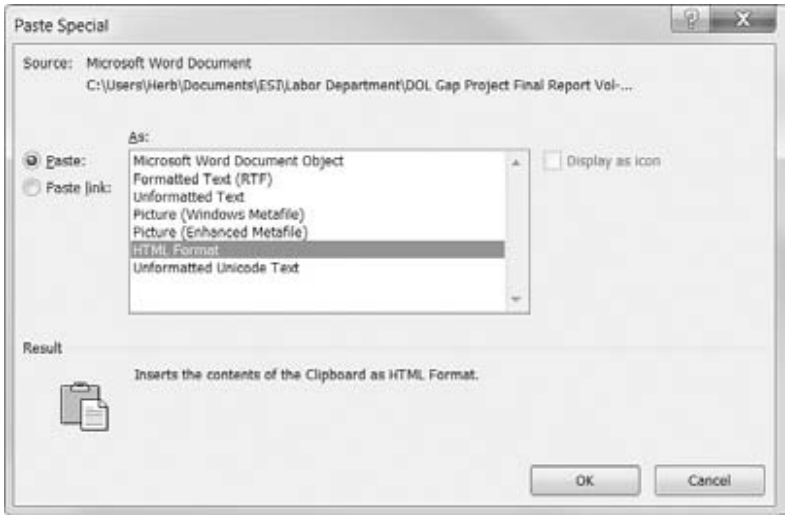
The Paste Alternative

If you're not particularly steady-handed, an alternative to all this dragging and dropping is to copy and paste. With some programs that do not support dragging, such as Excel (for which dragging cells selects rather than drags), copying and pasting is the *only* way to fly.

You know the drill. Use the source program's supported features to select the desired item, right-click the selection, and choose Copy to copy the item to the clipboard. Move to the Word document and click where you want to deposit the clipboard's contents. If you're positive about the result you'll get, click Paste (in the Home tab's Clipboard group) or press Ctrl+V. If you're unsure about your options, click the arrow just below Paste in the Home tab's Clipboard group, and choose Paste Special.

FIGURE 24-13

Many clipboard items default to being pasted as HTML.



The options that appear vary greatly depending on the nature of the item and the source program. Increasingly, the default action is HTML Format, as shown in Figure 24-13. Note the top option listed: Microsoft Word Document Object. While it's not clear that that option would be the most useful one, it's equally unclear that HTML Format would be. See Chapter 10 for more information about using the clipboard.

Summary

In this chapter you've learned about linking and embedding objects. You've seen how to use the Object tool in the Insert ribbon, as well as how to use dragging, dropping, and the clipboard to accomplish the same goals, but with additional options. You've also learned how to insert other text files into a Word document. You should now be able to do the following:

- Choose whether to link or embed an object, or use some other approach
- Use the Text from File option to fully apply a changed template to a file
- Use the right mouse button strategically to control dropping options
- Distinguish between LINK and HYPERLINK

Part V

Document Design

Content and form often are depicted as classic combatants in the world of words and publishing. Much of the Bible to this point has focused on content, the basic building blocks of Word documents. While what you say and how you say it are important, so is how it's presented. Part V focuses on document design, looking at how you put it all together so that what you say actually gets read.

Chapter 25 deals with page setup and issues that require breaking documents into multiple sections. Chapters 26 and 27 show the ways that textboxes and/or columns can help you structure text for special publications such as newsletters and brochures. Chapter 28 explores the dark secrets of background matter, including the use of watermarks and other means of decorating page backgrounds and backdrops. Chapter 29 looks at Word 2010's ability to publish Word documents in PDF and XPS formats. Chapter 30 surveys Word's HTML, XML, and blogging capabilities. Last but not least in Part V, Chapter 31 shows you everything you need to know about templates and themes.

IN THIS PART

Chapter 25
Page Setup and Sections

Chapter 26
Textboxes and Other Shapes

Chapter 27
Columns

Chapter 28
On Background

Chapter 29
Publishing as PDF and XPS

Chapter 30
Blogging and Publishing as HTML

Chapter 31
Templates and Themes

CHAPTER 25

Page Setup and Sections

This chapter examines some concepts that might be a bit challenging if you're new to Word, perhaps even if you're not new to Word. Grasping these concepts, however, opens up the marvelous and potential-filled world of section formatting, which enables you to do wonderfully creative things with your documents.

To fully grasp what this chapter is about, you're going to have to make sure that you can see section breaks and other nonprinting formatting characters. Although some users think these characters are an eyesore and distract from the basic business of putting words into the computer, they should instead be viewed as flashlights that illuminate otherwise dark corners that are home to the secret and mysterious powers of Microsoft Word. Wow! Watch out, Robert Langdon!

It's time to turn on those flashlights, assuming they're not already on. In Figure 25-1, the upper paragraph has nonprinting formatting marks turned on, whereas the lower paragraph has them turned off. You press Ctrl+Shift+* to toggle them on and off, or click the Show/Hide (¶) button in the Paragraph section of the Home ribbon tab. To truly understand what's happening in this chapter, as well as what's happening in your documents, you should toggle those nonprinting formatting characters on — at least for now. From here on out in this chapter, it's assumed that you can actually see what's being talked about. Otherwise you'll miss out on all the fun and you'll remain in the dark.

IN THIS CHAPTER

Section formatting

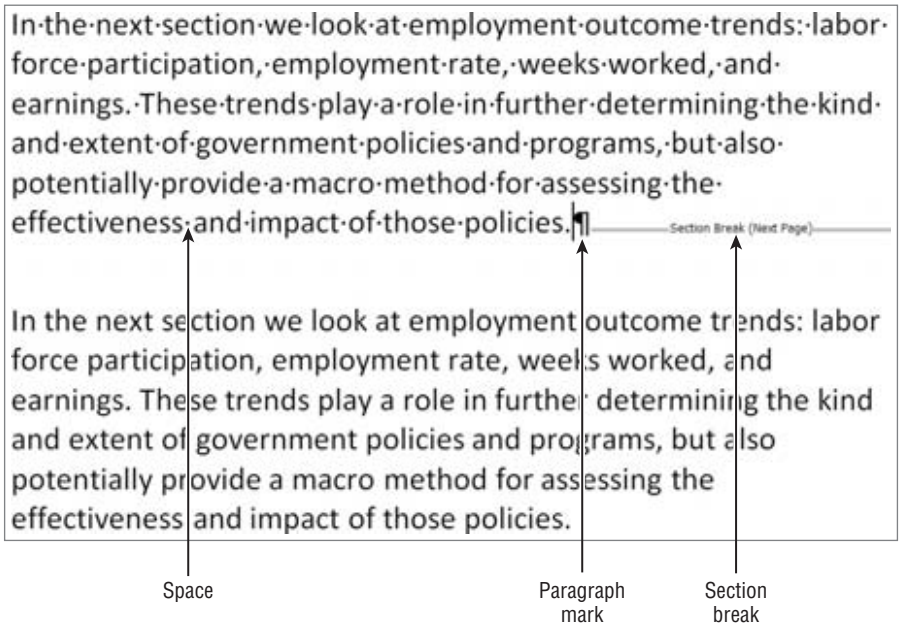
Page layout

Working with section breaks

Page borders

FIGURE 25-1

These two paragraphs are identical, but in the upper one, Ctrl+Shift+8 has been pressed to toggle nonprinting formatting marks on.



Page Setup Basics

Page setup is an interesting concept in Word. It's interesting because the phrase really isn't about setting up a page. It's really about setting up section formatting. We've talked earlier about distinct units of formatting — letters, words, sentences, paragraphs. For Word, section formatting is large-scale formatting that usually affects the entire document. The scale of section formatting is so encompassing, in fact, that it can't be contained in styles. To contain section formatting, you need a whole document or a whole document template.

Section Formatting

Word uses section breaks to separate distinctly-formatted parts of a document. Most documents, in fact, have just a single section. Only when you need to apply different section formatting within the same document do you need to create a document that contains more than one section. Different sections are necessary for variations in the following kinds of formatting:

- **Headers and footers:** Includes changes in page numbering style (except for Different First Page settings)
- **Footnotes:** Can be set to be numbered continuously or set to restart numbering on every new page or section
- **Changes in line numbering style:** Except for suppression on a paragraph-by-paragraph basis
- **Margins:** Indentation can vary within a section, but not margins.
- **Orientation:** Landscape versus portrait (actually done through paper size)
- **Paper size:** 8.5 × 11 (letter), 8.5 × 14 (legal), 7.25 × 10.5 (executive), A4 (210.03 × 297.03 mm), and so on
- **Paper source:** Upper tray, envelope feed, manual feed, and so on
- **Columns:** Snaking newspaper-style columns, the number of which cannot vary within a document section

Them's the Breaks (Section Breaks, That Is)

Word uses four kinds of section breaks. What kind of break you use depends on why you're breaking:

- **Next Page:** Causes the new section to begin on the next page
- **Continuous:** Enables the current and next section to coexist on the same page. Not all kinds of formatting can coexist on the same page, so even if you choose Continuous, Word will sometimes force the differently formatted content onto a new page. Section formatting that can be different on different parts of the same page includes the number of columns, left and right margins, and line numbering.
- **Even Page:** Causes the new section to begin on the next even page. If the following page would have been odd, then that page will be blank (unless it has header/footer content, which can include watermarks).
- **Odd Page:** Causes the new section to begin on the next odd page. If the following page would have been even, then that page will be blank, except as noted for the Even Page break.

If you set up a letter in which the first page is to be printed on letterhead, but subsequent pages are to be printed on regular stock (using different paper feed methods), the first page must be in a separate document section. If you set up a letter for which the first or last page is an envelope, the envelope must be in a separate section — for multiple reasons, because envelopes typically use a different printer paper source, different orientation (landscape), and different margin settings.

Inserting Section Breaks

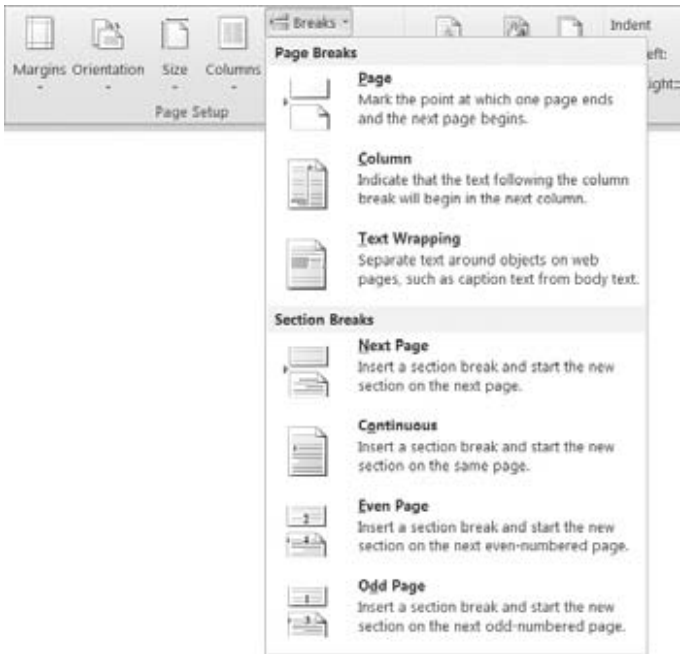
To insert a section break, in the Page Setup section of the Page Layout ribbon, as shown in Figure 25-2, click Breaks. Word displays a variety of different kinds of breaks, including the four types of section breaks. Click the desired section break.

Tip

If you're inserting multiple breaks of the same kind to section off part of a document to be formatted, after inserting the first section break you can use F4 (Repeat) to insert subsequent breaks. Keep in mind that if you do something else after inserting a break, F4 will repeat that other action rather than insert another break. ■

FIGURE 25-2

The icons next to the four section break types provide a graphic hint of what the different breaks do.



Automatic Section Breaks

Because some kinds of formatting require a section break in order to vary within a document, Word automatically inserts one or more section breaks when you apply "qualifying" formatting to selected text. Sometimes it gets those breaks right, sometimes not. You'll have to be vigilant if you're going to rely on this feature.

For example, suppose you want an interior set of paragraphs to be formatted in three columns, while the adjacent areas are formatted as a single column. Select the paragraphs you want to differentiate and in the Page Layout ribbon, choose Columns ➪ Three Columns. Word automatically inserts Continuous section breaks before and after the selected text to cordon it off for the distinct formatting. If you're lucky, that's what it does, that is.

Sometimes, but not always, Word will insert the wrong kind of section break before and/or after the selected text. It's never quite clear why, but when that happens the best recourse is to press

Ctrl+Z to undo the attempt, bracket the target text with the desired type of section breaks, and then apply the formatting to the section you want formatted differently.

Styles, Section Formatting, and Paragraph Formatting

Styles can contain font/character-formatting attributes and paragraph-formatting attributes. However, they cannot contain section-formatting attributes. Therefore, for example, you cannot create a style that would enable you to format a given selection with three columns and 1.5-inch left and right margins. Stand by for a few minutes, however, and you'll see how you can indeed effectively create a style for section formatting, although it's not really a style.

Recall that in Chapter 8, "Paragraph Formatting," you learned that the paragraph mark is the repository of paragraph formatting. Similarly, the section break is the repository of section formatting. If you delete a section break, the current section adopts the formatting of the section that follows, i.e., the section whose section break is still intact.

Where is the section break in a document that has only one section? In fact, most documents have only a single section, so this is a serious and valid question. There is an implied section break at the end of the document, so if you insert a section break into a single-section document, the formatting for section one resides in that section break, and the formatting for section two effectively resides in the permanent paragraph mark at the end of the document.

Permanent? Yes, permanent. If you don't believe it, with paragraph marks displayed, delete everything in a document. Now delete that last paragraph mark. You can't do it! (You can hide it by clicking the Show/Hide button in the Paragraph group in the Home ribbon, but that's cheating, because it's not really gone.)

Saving Section Formatting for Reuse

If section formatting can't reside in a style, then how can you save it for later use? Suppose you often use a very precise set of section formatting attributes — margins and columns, for example — and want to save them for use in other documents. There is a way, but it doesn't involve using what's traditionally called a style. Instead, use a Quick Part or a Building Block.

To do this, insert section breaks — Continuous or Next Page, as needed — to bracket the area to be formatted. Format the first section break in as vanilla or typical a way as possible. This first section break will be used to shield existing text from the new formatting when the Building Block or Quick Part is inserted into an existing document. If it's inserted at the beginning of a document, the vestigial section break can then be deleted.

Format the area between the first section break and the second as needed (see the next section, "Page Setup Dialog," to learn about a handy all-in-one-place location to set section formatting, or display the Page Layout ribbon).

Finally, select both section breaks and the interior matter (it doesn't have to contain text because section formatting resides in the section break), and choose Insert ➪ Quick Parts ➪ Save Selection to Quick Part Gallery. In Create New Building Block, in the Name box, type a descriptive name for the item as well as a longer description. If you'll need this item frequently,

save it to the Quick Parts Gallery. (Otherwise, you might as well save it as AutoText.) Use the Category drop-down setting to choose Create New Category. In the Create New Category dialog box, as shown on the right in Figure 25-3, type a category name that you can later recall to access all your custom section formatting. Click OK, twice.

FIGURE 25-3

Use Quick Parts or Building Blocks to create reusable section ''styles.''



Now, whenever you want this particular kind of formatting, it's there waiting for you. Choose Insert ➪ Quick Parts, and if it's in the Quick Parts Gallery, click it to insert it. If it's in AutoText or elsewhere, choose Building Blocks Organizer. Click the Category heading to sort by category, select the item, and then click Insert. Or, if it's a simple name, type it and press F3. Or press Enter when the AutoComplete tip appears, assuming AutoComplete tips are turned on: Word Options ➪ Advanced tab ➪ "Editing options" (last one in the list).

Page Setup Dialog

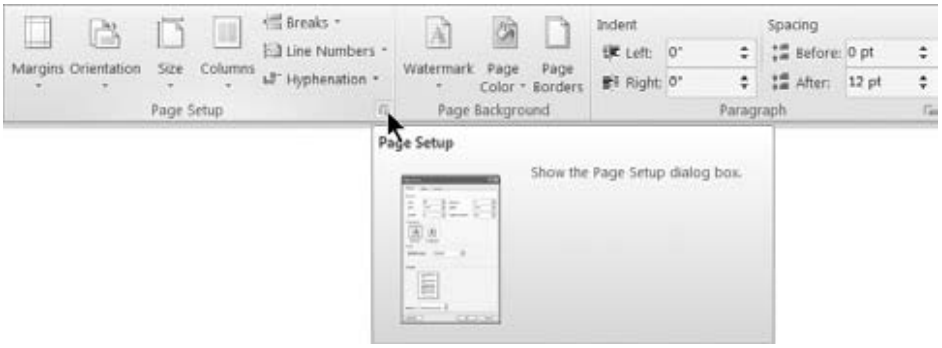
For access to section formatting, click the Page Layout ribbon tab. The Page Setup section provides access to a number of section-formatting attributes, as well as to the Page Setup dialog box, as shown in Figure 25-4. The Page Setup section of the ribbon also contains Hyphenation, which is not a section-formatting attribute. As discussed in Chapter 8, hyphenation is a paragraph-formatting attribute.

Tip

If the Page Layout ribbon isn't showing, you can also activate the Page Setup dialog box by double-clicking the vertical ruler, if it's displayed, or even by double-clicking the left edge of the Word window in the document area (i.e., anywhere below the horizontal ruler and above the horizontal scroll bar). ■

FIGURE 25-4

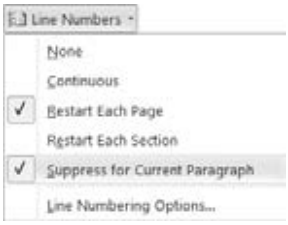
The Page Setup section of the Page Layout ribbon provides access to section formatting and the Page Setup dialog box.



If you click the Line Numbers drop-down arrow, note that the fifth option Suppress for Current Paragraph, shown in Figure 25-5 — actually is inaccurate. The feature should say Suppress for *Selected* Paragraphs. If you choose this option, line numbers for the current paragraph (even if no text is selected) or for the entire selection are suppressed.

FIGURE 25-5

Suppress for Current Paragraph suppresses line numbering for the current paragraph or all paragraphs in the current selection.

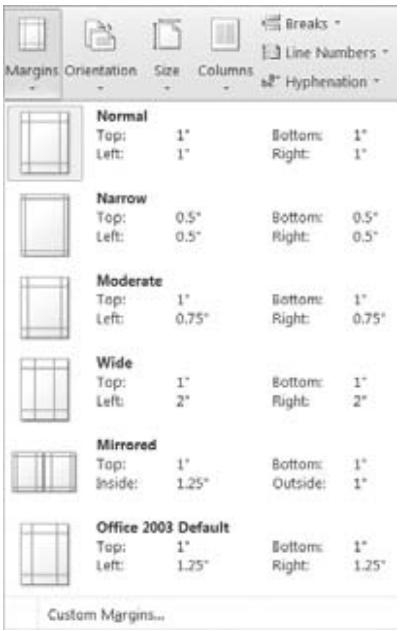


Margins

Using the Margins drop-down, shown in Figure 25-6, you can apply a variety of different preset margin settings. If the document contains multiple sections, each of the presets will be applied only to the current document section if nothing is selected or only to the selected sections if multiple sections are included in the selection.

FIGURE 25-6

The Margins drop-down offers a selection of preset margins, including Office 2003 Default, just in case you want to reminisce.



If you want more precise control choose Custom Margins, which opens the Page Setup dialog box to the Margins tab, shown in Figure 25-7. From here you can control all margins as needed, and apply the change where you want. If text is selected, then "Selected sections" and "Selected text" replace "This section" and "This point forward," respectively.

You can also adjust the top and bottom margins by dragging the blue-and-white boundary in the vertical ruler to the left of the document window (depending on your Word Options ➪ General Color Scheme settings, you might see shades of gray or some other color rather than blue). To increase the top margin, drag the top border down. To increase the bottom margin, draw the bottom border up. In either case press the alt key to display the margin setting as you're dragging.

Orientation

Orientation refers to whether the page is laid out horizontally (landscape) or vertically (portrait — the default orientation). You might sometimes need to rotate a page to landscape in

order to fit a particular picture, chart, table, or other object. It should be emphasized, however, that making a single page landscape carries with it a number of consequences that might be considerably worse and harder to deal with than trying to find a way to rotate the object itself.

FIGURE 25-7

Using the Margins tab of the Page Setup dialog box, you can control how/where the new formatting is applied.



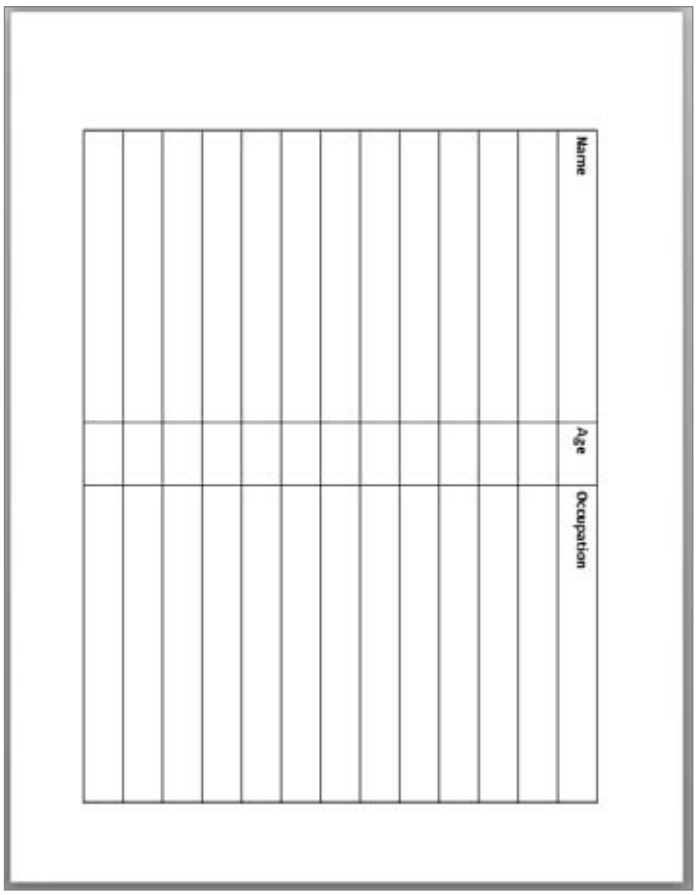
Consider page numbers and other header and footer content. If the whole page is changed to landscape, then the header and footer now rotate as well. To have the headers and footers located in the correct positions relative to portrait-oriented pages takes a bit of strategizing. The usual approach is to set up different headers and footers for the solitary landscape page. To get the orientation correct, you might consider putting the header and footer material into either a textbox or a single-cell borderless table in which the text has been rotated 90 degrees.

Alternatively, you can keep the orientation as portrait and rotate the table, chart, or picture instead. For pictures and charts, rotation isn't challenging. With Wrapping (Picture Tools Format ribbon, in the Arrange group) set to anything other than "In line with text," simply rotate the picture or chart 90 degrees using the rotation handle, as shown in Chapter 22, "WordArt."

Tables are a bit more challenging, but you have several options. If you're just now creating the table, select the entire table and in the Table Tools Layout ribbon, Alignment section, click Text Direction to rotate the text so that it can be read if you tilt your head to the right or left. Keep in mind that columns and rows are reversed. It's not necessarily easy to work this way, but it can be done, as shown in Figure 25-8.

FIGURE 25-8

With all text in a table rotated 90 degrees, it's possible to create a sideways table, rather than have to change orientation within a document.



Another option would be to copy the table to the clipboard, choose Paste ➪ Paste Special, and paste the table into the document as a picture. Because it's now a picture, you can choose any floating wrapping style and then rotate the table as needed so that it fits comfortably, but sideways, in a portrait-oriented Word document page. As above, headers and footers will display in portrait mode because you haven't changed the paper orientation.

The downside is that sometimes the graphics resolution of this technique isn't perfect. You'll have to decide if it's acceptable and legible. Plus, to make changes in the table, you need to maintain a copy of the actual table and remake the "conversion" as needed.

Another negative is that once you've done this to a table, you won't be able to edit it anymore. If you decide to go this route, you might consider saving the non-graphic version of the table as a Building Block in the current template. This way it will still be accessible if you need to modify it.

A variation on this approach, if the table fits into a window from which you can copy it, is to use screen-capture software to take a picture of the table. This approach often yields more predictable and better-quality graphics, but it has the same drawbacks as the previous approach, and you must have a sufficiently large monitor and amenable screen-capture software (such as SnagIt, from `www.TechSmith.com`, which is highly flexible).

Size

Size refers to paper size. A number of preset standard sizes are available from the Size drop-down in the Page Setup section of the Page Layout ribbon, shown in Figure 25-9. Clicking More Paper Sizes displays the Paper tab in the Page Setup dialog box. While it says "More Paper Sizes," that's not actually what you get. The "more" refers to the Custom Size setting at the bottom of the Paper Size list, which enables you to set any size up to 22 inches. This assumes that your printer supports something that large.

Columns

Use the Columns tool on the Page Layout ribbon to set the number of columns either in the current section or in all sections in the current selection if text is selected. See Chapter 27 for more information on column formatting.

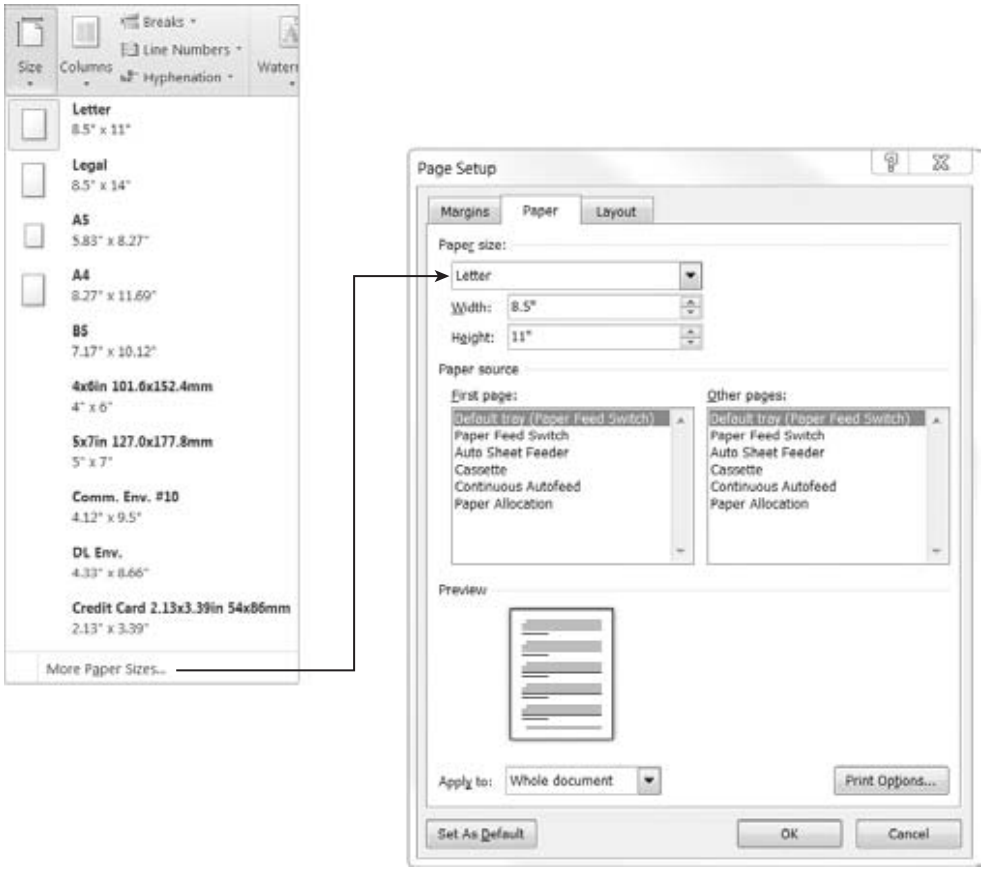
Page Layout Settings

We've already looked at the Margins and Paper tabs in the Page Setup dialog box. The Layout tab, visible in Figure 25-10, houses additional settings, some of which often go unnoticed. Headers and Footers settings are also set in the Layout tab; see Chapter 19, "Headers and Footers," for a full discussion.

If the Page Layout ribbon is showing, the quickest way to display the Layout tab of the Page Setup dialog box is to click Line Numbers ➪ More Line Numbering, even if you're not interested in line numbering. If the Page Layout ribbon isn't showing, you can double-click on the vertical ruler or between the horizontal ruler and the bottom of the ribbon area to display the Page Setup dialog box, and then click the Layout tab.

FIGURE 25-9

Click More Paper Sizes to display the Paper tab in the Page Setup dialog box.



Fixing or Changing a Section Break

The "Section start" setting shown in Figure 25-10 is a bit cryptic and confusing to many users, but it can be extremely useful. Have you ever ended up with the wrong kind of

section break? For example, suppose you want a Continuous section break, but you have a New Page, Odd, or Even section break instead. This can happen either because *you* inserted the wrong kind of break, or because *Word* inserted the wrong kind of break automatically.

The ordinary impulse is to delete the wrong one and insert the kind you want. Sometimes, however, despite your best efforts, you still end up with the wrong kind of break.

"Section start" to the rescue! Put the insertion point into the section that is preceded by the wrong kind of break. Activate the Page Setup dialog box using any of the techniques described earlier. Click the Layout tab to display the dialog box view shown in Figure 25-10. Set "Section start" to the kind of section break you want and click OK.

FIGURE 25-10

The ''Different odd and even'' and ''Different first page'' header/footer settings enable you to set different headers and footers without using another section break.

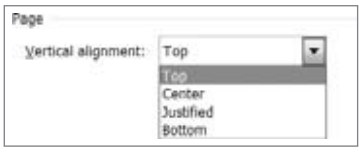


Vertical Page Alignment

Another often-unnoticed feature in Word is the "Vertical alignment" setting. By default, Word sets the vertical alignment to Top, and most users never discover the additional options shown in Figure 25-11. Because it is a section-formatting attribute, you can set vertical alignment for the whole document or just for selected sections.

FIGURE 25-11

Word provides four different types of vertical page alignment.



Vertical alignment can be extremely useful for particular parts of a publication — such as the title page for a format report, booklet, or book — as well as for short letters, brochures, newsletters, and flyers. For title pages, setting the vertical alignment to Centered is almost always more efficient than trying to insert the right number of empty paragraphs above the top line, or trying to set the Spacing Before: to just the right amount (in the Paragraph section of the Page Layout ribbon, as shown in Figure 25-4). For one-page notices, vertical alignment is also often just what the doctor ordered.

For some newsletters and other page-oriented publications, setting the alignment to Justified serves a couple of purposes. Not only does it make the most use of the whole sheet of paper, it adjusts line spacing to do it. Hence the appearance is smoother than it might be otherwise. This setting also lets you optimize the point size if you want to make the font as large as possible without spilling onto another page.

Page Borders

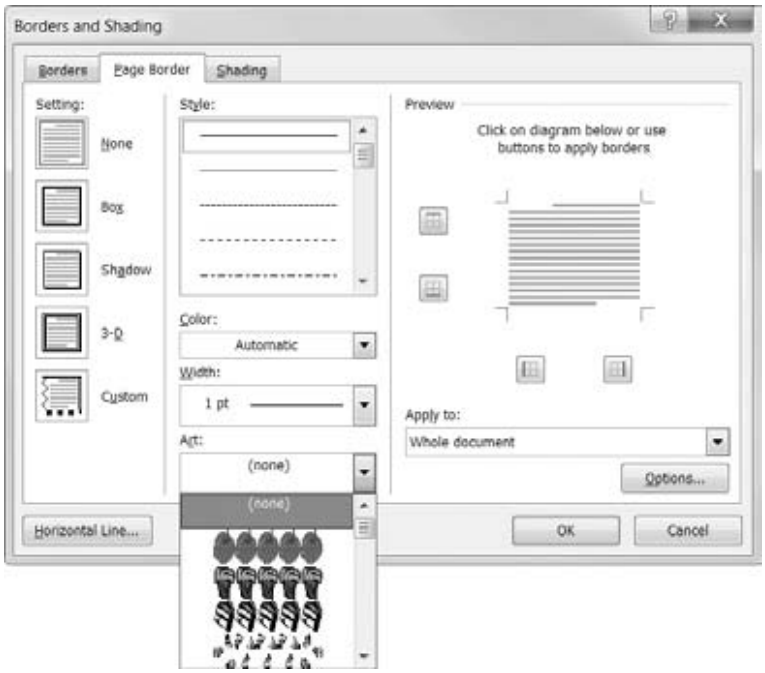
The last Page Setup setting we'll look at is page borders. A page border is a line, a set of lines, or decorative artwork that appears around the perimeter of the page. You see them a lot on title pages as well as on flyers and brochures.

To insert a page border, in the Page Layout ribbon, choose Page Borders, which displays the dialog box shown in Figure 25-12. The dialog box offers the same options you saw earlier in Chapter 8, "Paragraph Formatting," under "Boxes and Borders." In addition, however,

you have over 150 Art options you can use to create decorative borders, although some of these might look pretty cheesy compared to the professional graphics you can create with SmartArt.

FIGURE 25-12

For page borders, you can insert a variety of different lines, or choose from over 150 built-in Art items.



For placing a border around a title page, you can set "Apply to" to "This section — First page only." Other options here are "Whole document," "This section," and "This section — All except first page."

To control the placement of the page border with respect to the edge of the text or paper, click Options for the Border and Shading Options dialog box shown in Figure 25-13. Note that when you're setting page borders, paragraph-related options are grayed out. Using the "Measure from" box, you can set the distance of the page border either from the text or from the edge of the paper.

FIGURE 25-13

Use Border and Shading Options if your page border crowds the text too much.



Summary

In this chapter you've learned about the difference between section and paragraph formatting, and exactly what section formatting is. You now know how to create new document sections, as well as why you might want to. You should now be able to do the following:

- Convert a Next Page section break into a Continuous section break, and vice versa
- Vertically align a section of a document
- Change the paper size and paper feed for the envelope section of a document
- Place decorative or line borders around specific pages

CHAPTER

26

Textboxes and Other Shapes

Textboxes are shapes that can contain text. They are containers that themselves can be manipulated as graphics, but that can contain text (as well as a variety of other objects). For all the marvelous things they can do for you, they are seriously underused. Textboxes:

- Enable you to place text anywhere on the page, including on top of other text
- Can be bordered or unbordered, filled or unfilled
- Can be chained together so that text flows from one into a second, into a third, and so on
- Can be any shape, although the inside text itself is constrained to a rectangular shape (unless you resort to tricks)
- Can be rotated to any angle (Yes! This is new in Word 2010!)

With all this flexibility, why is the chapter called "Textboxes and Other Shapes"? It's called that because the distinction between textboxes and other shapes is largely academic. When you first insert a textbox, it's purely a rectangular container for text. However, you can quickly and easily transform it into any of the shapes supported by Word — and there are plenty — and it will still act as a text container.

Furthermore, textboxes can be rotated — without dumping the text out! Of course, the text itself has the sense to maintain its orientation. However, having a text container that itself can be rotated expands your creative horizons. And, in Word 2010, the text can be rotated along with the container — to any angle!

IN THIS CHAPTER

What are textboxes?

Why use textboxes?

Prefab textboxes

Formatting textboxes

Adding text to other shapes

Why Use Textboxes?

There are at least three possible alternatives to textboxes, so it's appropriate to ask why one should use them. Each of the three alternatives offers different capabilities:

- **A single-cell table:** Pro: It can automatically expand as text is added to it. You can selectively border the sides differently, if needed. It can be divided internally into more cells with hidden internal borders for special effects. It can be made into a floating table so that text can wrap around it. Con: It has limited wrapping talents, its wrapping points can't be changed, it cannot be rotated, and it's limited to a rectangular exterior format.
- **A WordArt object:** Pro: Almost infinite possibilities for shaping and contouring text. Fully flexible wrapping capabilities. Con: It is limited to a rectangular exterior shape.
- **A bordered paragraph:** Pro: It is normal text, so it has a full range of regular text properties. It's easy to understand. Con: It has no wrapping capabilities and can appear only in line with other text, since it is regular text. Note that if you insert a bordered paragraph as an object, it will simulate some aspects of a textbox. However, manipulation and editing then become correspondingly more tedious. Moreover, it's no longer "normal text" that doesn't require special handling.

What does a textbox do that's different? You can convert any Word shape into a textbox: just right-click it and choose Add Text. More important than that, however, is something that many Word users don't know about: Different textboxes can be *linked* so that text flows from one textbox to another. This makes textboxes the perfect structure for newsletters or other publications in which text begins in one place and continues in another place that isn't part of the document's natural flow of text. You'll learn how to set this up later in the chapter.

Inserting Textboxes

To insert a textbox, move the insertion point to where you want the textbox to appear and then click the Textbox tool in the Insert ribbon. As suggested by Figure 26-1, Word has a number of ready-to-use textboxes that you can insert. We'll look at where those come from in a moment.

Scroll though the list and if you see a textbox that looks as if it will work for your purposes, click it. As shown in Figure 26-2, the textbox is placed at the insertion point. The textboxes that come with Word have been preformatted with a variety of attributes that make them suitable for different purposes. This one, called Braces Quote 2 (refer to Figure 26-1) is designed to present a quote "pulled" from the text of the document. Often used in magazines, pull quotes are designed to capture the reader's attention or to highlight an interesting portion of the text.

Note

The odd tab inside the textbox (it says Pull Quote) indicates that this is a content control device. It prevents your kids from seeing what's in the box. Just kidding. It's used by developers to create forms and templates that guide you in writing letters and other documents. With the Pull Quote container selected, if you click Properties in the Developer ribbon, you'll see that this particular container is a plain-text content control. See Chapter 44 for more about content controls. ■

FIGURE 26-1

You can insert any of more than 30 pre-built textboxes, or draw your own from scratch.

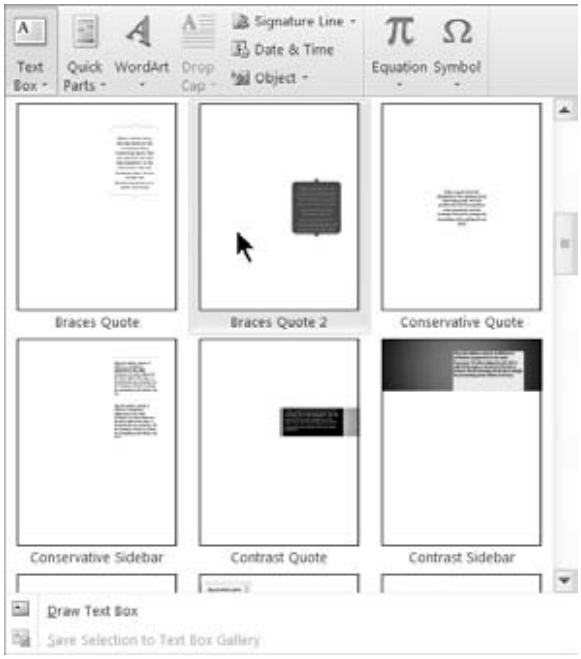
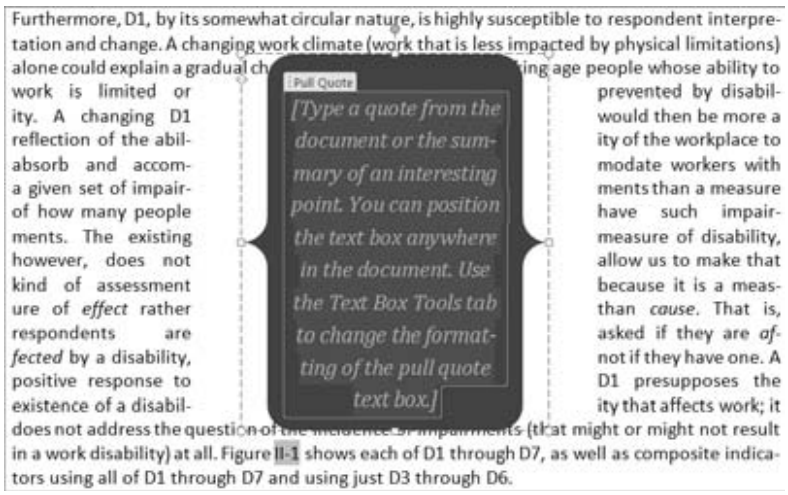


FIGURE 26-2

Ready-to-use textboxes are preformatted with borders, wrapping styles, and other formatting attributes that make them easy to use.

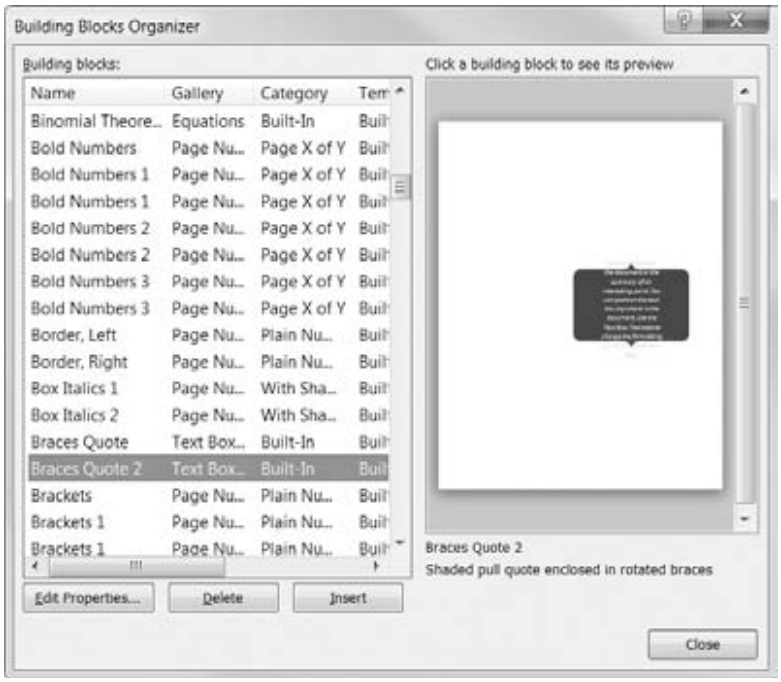


Prefab Textboxes

At this point you're probably wondering where all the prefab textboxes come from. They come from the Building Blocks gallery. Look at the Gallery column in Figure 26-3 which shows two Text Box items. In the Insert ribbon, if you choose Quick Parts ➪ Building Blocks Organizer, you'll see listed all the textboxes that appear in the Textbox gallery, but in a much more succinct and compact list (than the gallery shown in Figure 26-1), as shown in Figure 26-3. If you create textboxes or modify prefab ones that you want to reuse, consign them to the Textbox gallery, and they will appear both there and in the Building Blocks Organizer. To save a textbox as a Building Blocks gallery item, see "Adding a New Building Block or Quick Part" in Chapter 13.

FIGURE 26-3

You can insert textboxes from the Building Blocks Organizer if you prefer to see a terser listing.



Drawing Your Own

You can also insert your own textboxes from scratch. Using the drop-down Textbox tool in the Insert ribbon, click Draw Textbox. The mouse pointer turns into a large plus sign. Click to start drawing, and drag until the textbox is the size you want, as shown in Figure 26-4. You can resize it as needed later. Release the mouse button and you now have your textbox. If you click the textbox, it will display six sizing handles.

FIGURE 26-4

Click and drag to create the textbox size you want.



When drawing a textbox you can hold down the following keys to modify the resulting box:

- **Shift:** Forces the box to retain the current aspect ratio
- **Control:** Forces the box to expand symmetrically in two directions, expanding from the center (up and down or left and right, depending on which way you drag), rather than just in the direction being dragged
- **Alt:** If gridlines are not displayed, this forces the box to increase in discrete increments that are aligned with the invisible grid. If gridlines are displayed, alt allows smooth dragging that ignores the grid. In the Insert ribbon, choose Align ➪ Show Gridlines to toggle gridlines.

Shift, Ctrl, and/or Alt can be combined for a combination of effects. Once the textbox has been drawn, the shifting keys have the effects described in Chapter 18, under "Resizing."

Formatting

Textboxes can be formatted with any of the tools in the Drawing Tools Format ribbon, shown in Figure 26-5. To format or edit text in a textbox, click in that textbox. When the text cursor is displayed you can enter, edit, and format text.

FIGURE 26-5

For all intents and purposes, textboxes can be formatted like other shapes.



To format the text itself — to change font, point size, and other character-formatting attributes — use the tools in the Home ribbon, the tools in the Mini Toolbar (if text is selected), or keyboard shortcuts, as described in Chapter 7. Formatting works for textboxes as it does for ordinary text: Select what you want to format and then apply the formatting. You can apply paragraph and style formatting as well, perhaps even creating dedicated styles for formatting textbox text.

Rotating Text

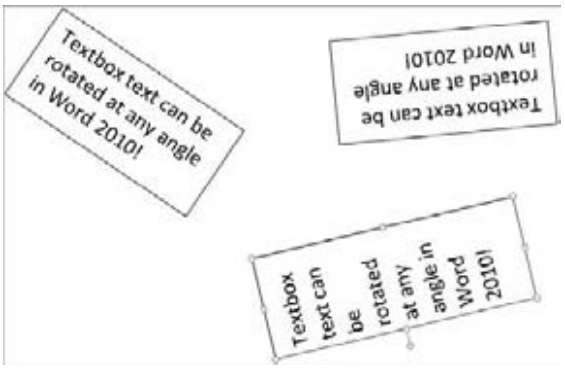
You can display textbox text (as well as table text) in any degree of rotation, as shown in Figure 26-6. Typical applications for rotated text include mirroring text for tent cards, calling attention to a banner headline, and the simulation of index tabs in the right margin. For example, you might include the current chapter title and number at the right side. In such cases the textbox would be dragged into the header or footer area so that the information automatically appears in the same place on each page.

Tip

Word 2010 can rotate a textbox and the text it contains to any angle — in three dimensions! If you need text to *not* rotate (to behave as it did prior to Word 2010), right click the border of the textbox and choose Format Shape. In the Format Shape dialog box, click the Text Box tab, and enable the "Do not rotate text" option. ■

FIGURE 26-6

Textbox text can be rotated to any angle.



To rotate a textbox, drag the green handle until the textbox is in the desired attitude. For very precise or 3-D rotation, right-click the textbox border and choose Format Shape. Drag the Format Shape dialog box so that you can see the textbox you wish to rotate. In the 3-D Rotation tab, use the X, Y, and Z Rotation tools to twist and turn the textbox as desired. Or, use the Presets: to choose a rotation that fits your needs, or choose one that makes a better starting point before you customize the rotation.

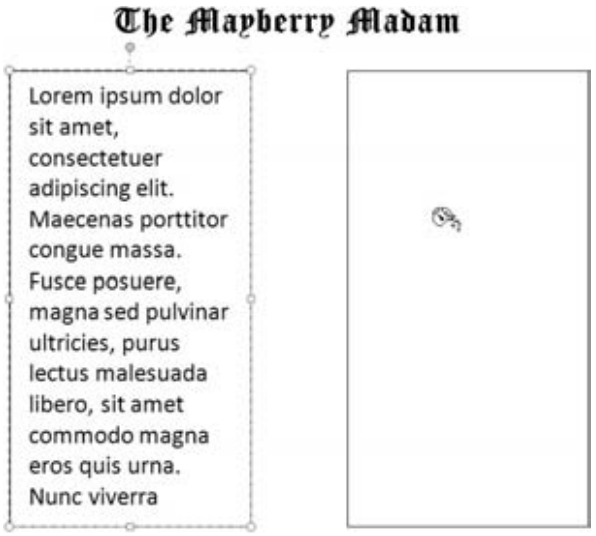
Chaining or Linking Textboxes

You can use the Create Link tool to chain or link textboxes together. Many users see the name of this tool (Create *Link*) and immediately think about *hyperlinks*. That's not what this feature is about. Instead, the chain tool, as it's more appropriately known, is used to make text flow from one textbox into another.

A common newsletter format is shown in Figure 26-7. The strategy is to use one or more linked textboxes for each story or article. Textboxes can be resized as needed if they are too large. If a textbox is too small, you can continue the article in another textbox by linking the two. For example, in the figure two textboxes are showing. There is too much text to fit in the leftmost textbox. With that textbox selected, as indicated by the sizing handles, click the Create Link tool in the Drawing Tools Format ribbon tab (Text section). This turns the mouse pointer into a cup that's tilted sideways with letters spilling out of it. Move the pointer over the textbox into which you want that text to "spill," and click to cause text to flow from the first textbox to the second. You can add text to the bottom of the page 1 item, indicating that the article is continued on page 2, and add "Continued from . . . " at the top of the textbox on page 2.

FIGURE 26-7

With one textbox selected, click the Create Link tool, and then click the textbox into which you want the first textbox's text to flow.



Shape Styles

The Shape Styles tools, shown in the second section of the Format ribbon shown in Figure 26-5, are used to apply preset combinations of fill, outline borders, shadow effects, and 3-D effects to textboxes. The same styles are available for formatting any Word shapes. To apply a style, click the More drop-down arrow at the bottom of the Shape Styles gallery, and then move the mouse

over the styles. Because this is a live preview feature, the selected textbox changes when you move among the different styles.

You can apply shape styles to multiple objects at the same time. To select multiple textboxes, click the first one you want to select and then Shift+Click each additional textbox. Once they're all selected you can apply shape styles or other formatting as needed. When you're trying to achieve a particular theme by coordinating the shapes of all included textboxes, this can save you some work.

Tip

The F4 (repeat) key isn't just for text. It also works for graphical objects. If you apply a shape or other formatting to one textbox, you can then reapply that formatting to another by clicking it and pressing F4. As long as you don't detour to do something else, you can continue clicking and pressing F4 on additional objects until you've applied the formatting everywhere you need it. ■

Shape Fill and Shape Outline

Shape Fill and Shape Outline are both live preview tools. As shown in Chapter 22, rather than use one of the preformatted shape styles, you can apply your own shape fill and outline. You can also start with one of the preformatted styles, and then modify it as you like.

Shape Effects

Shadow, Reflection, Glow, 3-D and other special effects can be applied to textboxes as shown in Chapter 22. As noted above, you can either completely format textboxes on your own or start with a preformatted shape style and then apply different touches as needed.

Position

Use the Position tool group to set the position of the textbox on the page if dragging doesn't give you enough precision. The Position tool provides live preview of the nine preset positions shown in Figure 26-8.

Bring Forward and Send Backward

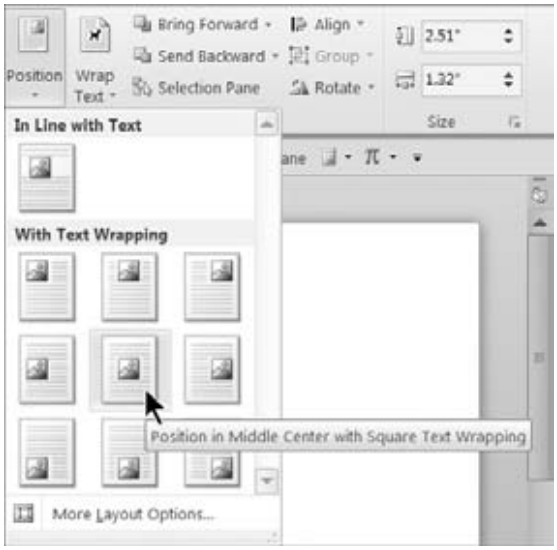
Use the Bring Forward and Send Backward tools to change the textbox's location in the graphics layers of the document. You can, for example, overlap textboxes with other textboxes and/or other graphics to create special effects. As a general technique, click the object you want to have reside at the deepest layer, drag it to where you want it, and then choose Send Backward ➪ Send to Back. Select the object that will be directly on top of the deepest one, and click Send Backward until it's where you want it. Depending on how many layers you have, you may need to switch among the Bring Forward and Send Backward options.

Tip

When working with the Bring Forward and Send Backward tools it's easy to lose your grip on graphical objects. If you have a hard time selecting one, use the Select Objects tool, coming up next. ■

FIGURE 26-8

Use the Position tool to place a textbox into one of nine preset page positions.



Select Objects Tool

When an object is nestled among others, it's sometimes impossible to select the one you need. For those times, it's useful to have the Select Objects tool in a handy location. By default, it's located in the Editing group in the Home ribbon. If you frequently work with graphical objects, you can make life a lot easier for yourself by placing a copy of the Select Objects tool onto the Quick Access Toolbar. In the Home ribbon's Editing group, choose Select, right-click the Select Objects tool, and choose Add to Quick Access Toolbar. You'll be glad you did.

To use the Select Objects tool, click it. The mouse pointer now turns into a hypersensitive object selection tool. If you can see any part of the object you want, click it to select it, even if it's buried several layers down. If you can't see it, drag objects that are on top out of the way.

Align

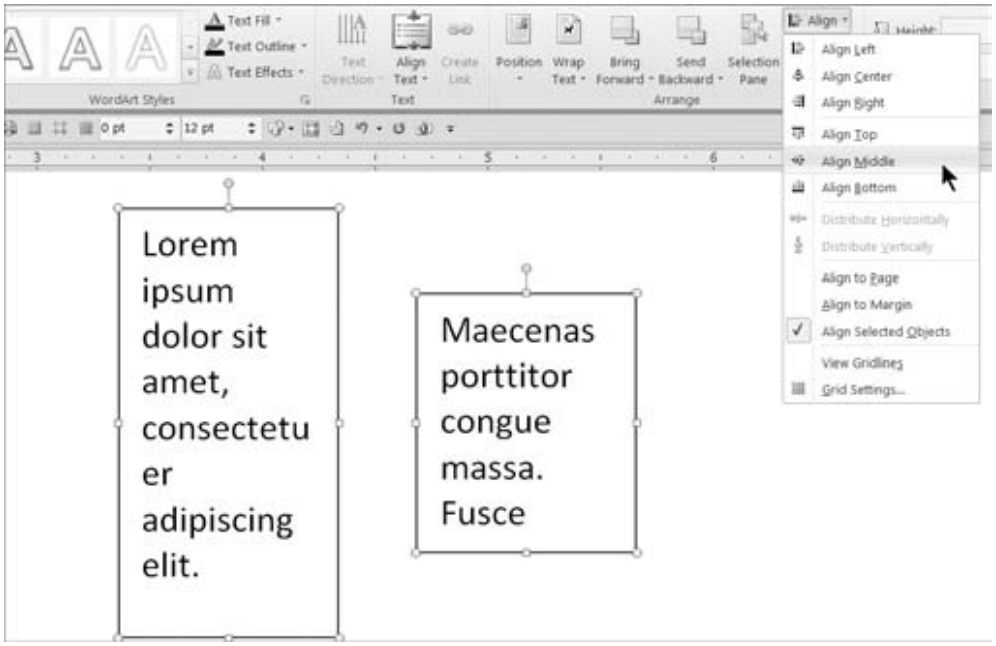
Use the Align tool options, shown in Figure 26-9, to align objects relative to each other and relative to the page or margin. This provides more precision than using your eyes and hands. If you have two textboxes of differing heights and want them to be the same distance from the top of the page, without changing their horizontal positions, select both of them and choose Align ➪ Align Top. Align Middle would move both objects vertically so that a single horizontal line would cut both in half, while leaving their horizontal positions untouched, and Align Bottom would make the bottom of each textbox the same distance from the bottom of the page.

Similarly, use the Align Left, Center, and Right tools for horizontal alignment of textboxes and/or other objects that are vertically arrayed with respect to each other. Use Distribute

Horizontally/Vertically to spread out three or more selected objects on the page. For a single object, the effects of Distribute will be the same as Align Center and Align Middle, respectively.

FIGURE 26-9

Align Middle centers objects vertically with respect to each other.



Grouping

Use the Group tool to connect two or more textboxes (and/or other objects) so that they act as if they were a single object. This typically is used when you have, for example, pictures that are positioned precisely either inside or relative to a textbox and you want their relative locations maintained when the objects are moved or copied elsewhere in the document.

To group objects, click the first object, and then Shift+Click each additional object. When all the objects are selected, choose Group ➪ Group in the Arrange section of the Drawing Tools Format ribbon. If you need to move or apply distinct formatting to an object relative to those in its set, click the group and choose Ungroup. Once you've moved or reformatted the object, choose Group ➪ Regroup to reconnect the group.

Tip

A new option for selecting multiple objects is to use the Selection Pane. At the right end of the Home ribbon tab, click the Select tool's dropdown arrow, and choose Selection Pane. In the Selection and Visibility pane, Ctrl+Click each object you want to select — you might need to experiment to determine which object is which if you have multiple objects of the same type. ■

The Format Shape Dialog

If all these ribbons and things are too much for you, you can always use a dialog box to format and manipulate textboxes. There are about a gazillion ways to display the Format Shape dialog shown in Figure 26-10. Right-click a textbox's border and choose Format Shape, or click the launcher in the Drawing Tools Format ribbon tab's Shape Styles section.

The different tabs are mostly intuitive and are described in detail elsewhere in this book, as this dialog box also does duty for formatting pictures, WordArt, and shapes.

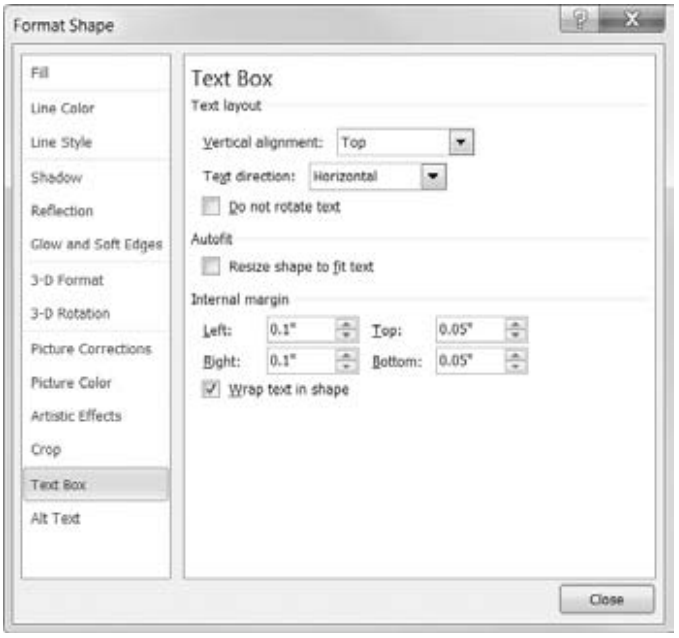
Use the Alt Text tab to provide alternative text if the user chooses not to display graphics. Sometimes users with visual disabilities cannot make out shapes, and a screen reader will use the Alt Text.

Note

"Doesn't everybody display graphics?" you might ask. Good question. The answer is no, not everybody. The visually impaired in particular depend upon document and web designers using *alternative text* so that they or a screen reader can read what a particular illustration or textbox is trying to convey. If a picture is worth a thousand words, then use at least a few of those words so that everybody can follow along. ■

FIGURE 26-10

Use the Format Shape dialog's Text Box tab for more direct and precise control over textboxes.



Summary

In this chapter you've seen the inside of textboxes. You learned how to use Word 2010's gallery of textboxes, as well as how to create your own. You've seen how to apply existing formats, as well as how to format from scratch. You should now be able to do the following:

- Convert any shape into a textbox
- Rotate a textbox and its text to any angle
- Change the text direction as needed for positioning on different parts of the page
- Use textboxes to design a newspaper or newsletter with text continuing from one textbox to another

CHAPTER 27

Columns

We've already looked briefly at columns in Chapter 25. This chapter takes a closer look and provides you with the information you need to decide whether your document actually needs columns — and, if so, how many, what kind, and so on.

At the outset, we need to be clear regarding what we're talking about when we say *columns*. Tables have columns, but that's not what we're talking about here. Tables are discussed in full in Chapter 17. You can also create the appearance of columns by setting up tabs. That's not what this chapter is about either. Tabs are discussed in Chapter 8.

In this chapter, *column formatting* refers to dividing the text so that it flows in columns across the page, as shown in Figure 27-1. This kind of formatting sometimes is called *newspaper columns* or *snaking columns,* and is a common format used in journals, newsletters, and magazines, although it's unlikely that those publications use Word's columns feature to accomplish their columnar formatting. Such publications likely use page layout programs because of the precise way in which they feature text, graphics, and advertising.

Why use columns? If you've ever analyzed the way you read or if you've ever taken a speed-reading course, you already know the answer. We use columns because they're easier and faster to read. Contrast reading a wide-format book with reading a newspaper. In a wide-format book each column of text (usually the whole page) is five or more inches wide. In a newspaper, columns typically are only a couple of inches across. We also use columns for a variety of other reasons, such as to utilize space more efficiently or for aesthetic reasons.

IN THIS CHAPTER

- Columns versus alternatives
- Changing column formatting
- Using section breaks with columns
- Using columns without section breaks

FIGURE 27-1

Column formatting is sometimes called *snaking columns* because of the way text zigzags across the page.


On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document. You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or diagrams, they also coordinate with your current document look.

You can easily change the formatting of selected text in the document text by choosing a look for the selected text from the Quick Styles gallery on the Home tab. You can also format text directly by using the other controls on the Home tab. This sentence is inserted to try to balance the columns on these pages.

Most controls offer a choice of using the look from the current theme or using a format that you specify directly. To change the overall look of your document, choose new Theme elements on the Page Layout tab.

To change the looks available in the Quick Style gallery, use the Change Current Quick Style Set command. Both the Themes gallery and the Quick Styles gallery provide reset commands so that you can always restore the look of your document to the original contained in your current template. On the Insert tab, the galleries include items that are designed to coordinate with the overall look of your document.

You can use these galleries to insert tables, headers, footers, lists, cover pages, and other document building blocks. When you create pictures, charts, or dia-

Similarly, consider the reason many people prefer to read physical newspapers rather than their online equivalents. While some of it has to do with tactile sensations, a lot of it has to do with chunks of text that are visually more digestible. When text is compacted into a narrow column, it's possible to see an entire sentence in one quick glance. This makes reading a more holistic experience and makes it possible to read with greater comprehension and speed.

Do I Really Want Columns?

The truth is that whether you want columns or not, you already have at least one in every Word document, so the real question is *How many columns do you want?* To answer the question, you should consider the nature of what you're writing, how it will be printed or published, and

who will be reading it. Text-dense documents benefit from columns, just as they benefit from graphics. Anything that helps the reader become more engaged with the text is good.

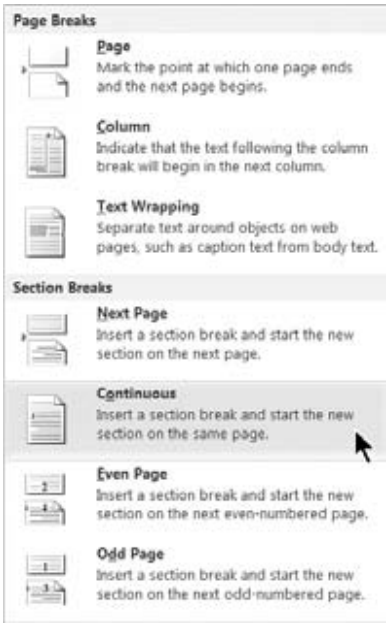
Aside from that, however, is the question of whether columns are the correct vehicle to accomplish your aim. If you read the preceding chapter on textboxes, you now know that you can use textboxes to get some of the same benefits as from Word's snaking columns. Especially for shorter documents or documents in which the flow isn't direct and logical, you probably should use linked textboxes or a combination of textboxes and columns.

Column Formatting

Column formatting is a section formatting attribute. Any part of a document that has a different number of columns must be "sectioned off" with section breaks. To insert a section break, choose the desired kind of break using the Breaks drop-down tool in the Page Layout ribbon (see Figure 27-2).

FIGURE 27-2

Section breaks and column breaks are not the same thing.



Note

Notice that Column is listed under Page Breaks, not under Section Breaks. Technically, a column break is neither a page break *nor* a section break. To create different numbers of sections in different parts of the

same document you must separate them by one of the four breaks listed under Section Breaks, as discussed in Chapter 25.

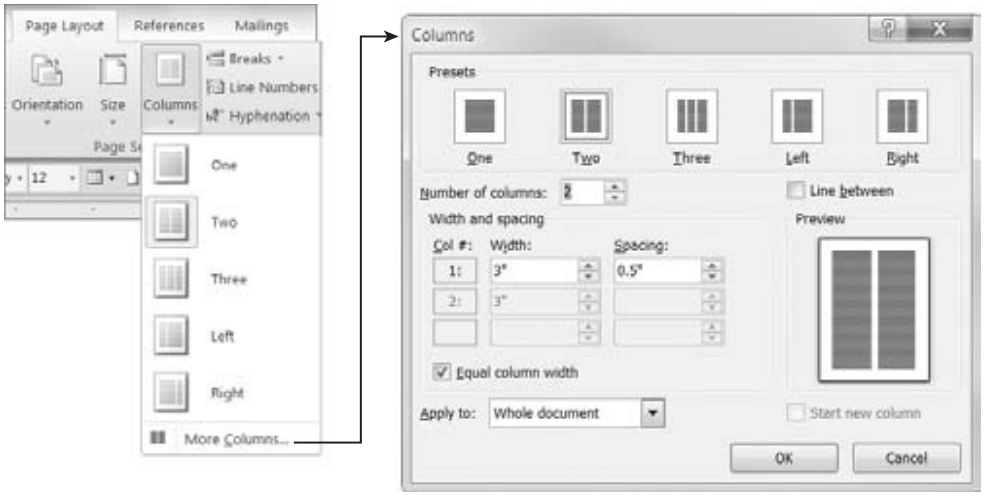
A column break is used *within* a column to force text to start at the beginning of the next available column. If you think of columns as mini-pages within a page, then in that sense a column break forces text to the next "page," even though that next page isn't necessarily on a new piece of paper. ■

Changing the Number of Columns

To change the number of columns for the current section (or selected sections), drop down the Columns tool in the Page Layout ribbon. The current column formatting (Two, in this case) is highlighted, as shown in Figure 27-3.

FIGURE 27-3

Word offers five preset column setups, or choose More Columns to design your own.



If you don't want any of the default preset column formatting, for additional control click More Columns, which displays the Columns dialog box, also shown in Figure 27-3. This dialog box shows the same set of five preset column formats as the Columns drop-down tool, but you can insert as many as two columns per inch of horizontal space between the left and right margins, up to a maximum of 44 columns. For standard paper 8.5 inches wide with one-inch left and right margins, you can have up to 13 columns. To get the maximum of 44 columns you would need paper at least 22 inches wide, assuming no margins and a pretty unusual printer. Plus, you'd probably also need to be obsessed, but that's a topic for a different sort of book.

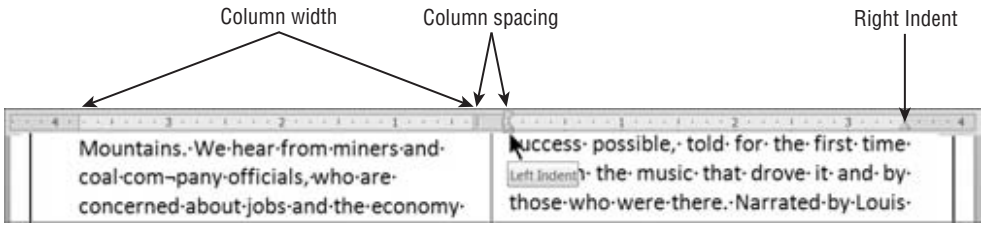
Note that the "Width and spacing" controls provide access to only three sets of columns at a time. If there are more than three columns, a vertical scroll bar appears in the Columns dialog box, providing access to additional column settings.

Line Between

In Figure 27-3, notice the "Line between" option. Use this option to draw a line between columns. If columns are closely spaced, this can help in maintaining the visual separation of the columns, thereby improving readability. When using ragged-right text edges rather than justified text, adding lines can create the appearance of straighter edges and better visual balance, as shown in Figure 27-4.

FIGURE 27-4

Left and Right Indent controls appear above the active column.



Formatting Columns Using the Horizontal Ruler

You can also format column width and spacing using the horizontal ruler. In Figure 27-4, notice that the Left and Right Indent controls can appear in only one column at a time. This doesn't mean that you get those controls only in a single column. It simply means that they are shown only for the active column.

To change the width of columns, drag the darker and lighter boundaries between the column spacing and width areas. When you drag to make a column larger, the adjoining space gets smaller, and vice versa. When "Equal column width" is checked, dragging the boundaries of any column expands or contracts all columns at the same time. The minimum column spacing is 0.

Special Formats

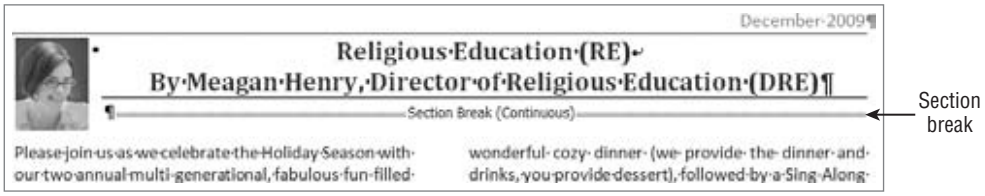
If you want part of a document to have three columns and another part to have a single column, those two parts must reside in different sections. (There is a way around the multisection requirement, by the way, which we'll look at in a moment.) Which one to use? The choice is yours; it should be driven by which works best in each particular situation.

Changing Columns Using Section Breaks

Consider the common newsletter format shown in Figure 27-5. Notice that there is a section break between the top section, which is a single column, and the material that follows, which is in two columns.

FIGURE 27-5

Differing Page Setup formatting, such as different numbers of columns, must be in different document sections.



One way to create this kind of format is to separate the *masthead* (the big title and other matter that goes with it) from the body using a Continuous section break, as shown in Figure 27-5. Move the insertion point to the beginning of where you want the multicolumn formatting to begin, and choose Break ➪ Continuous in the Page Setup section of the Page Layout ribbon. Now use the Columns tool or the Columns dialog box to apply the desired column formatting to the new section.

Tip

As indicated in Chapter 1, many of Word's legacy keystrokes work in Word 2010. If you tire of having to switch to the Page Layout ribbon to insert section breaks, press Alt+I, B (Insert ➪ Break) instead. ■

If there's a point at which you want the multicolumn formatting to change the number of columns again, insert additional section breaks (choosing Continuous, Next Page, Even, or Odd as needed), and apply the desired column formatting to those additional sections.

Alternatively, as described in Chapter 25, Word can insert section breaks automatically. Select the part of the document to which you want a given number of columns applied, and then apply the column formatting. You can do this using the Columns tool or the Columns dialog box, but you will get more consistent and predictable results if you use the dialog box. For some unknown reason Word sometimes inserts Next Page section breaks instead of Continuous section breaks. If this happens, you can always convert the section break to the correct kind using the Section Start setting in the Layout tab of the Page Setup dialog box, as shown in Chapter 25.

Changing Columns without Using Section Breaks

Earlier in this chapter you saw how to introduce column changes by separating different parts of the document with section breaks. If the entire document is to be multicolumn *except* the beginning and/or end, there's a way to accomplish this without introducing the complications of a multi-section document. Use the header and footer areas.

With the body of the document already in multicolumn format, double-click the header area so that you can edit it. In the Design ribbon, click to enable Different First Page so that you don't get the full banner header on every page. Type the title into the header area, and then use standard formatting techniques to apply the desired font, font size, centering, and other elements. To move the body of the document farther from the masthead area, drag the bottom margin of the header down, as shown in Figure 27-6.

To create the title area for subsequent pages, click Next in the Navigation section of the Design ribbon. Even though this is a single-section document, the Next tool knows that you really mean "Take me to the next distinct header (or footer) area."

FIGURE 27-6

As an alternative to creating multi-section documents, you can use the header area for titles of newsletters, brochures, and other publications.



Balancing Columns on the Last Page

When you have a multicolumn structure, Word treats each column as if it were a page with respect to the flow of text. Ordinarily text must fill column 1 before it goes into column 2, and must fill column 2 before it flows into column 3, and so on.

Consider the situation shown in Figure 27-7. Here text fills the first column and a little over half of the second column.

You can force Word to balance the columns (make them approximately the same height) by inserting a Continuous section break at the end of the last column. When you do that, Word tries to optimize document space to accommodate what comes next, even if nothing comes next. With a Continuous section break added at the end, the document shown in Figure 27-7 becomes the one shown in Figure 27-8. In some cases the columns won't balance perfectly. That's because of other constraints, such as widows and orphans. Nonetheless, symmetrically speaking, it's usually an improvement.

FIGURE 27-7

You don't have to accept uneven columns at the end of a document.


Windmill,

Thanks to those of you who responded to my column in the Windmill last month about support for those of us who are in career transition, perhaps having been nudged there by the challenging economy. We're had a small support group meeting on November 23 at the Church with a couple of recruiting and networking specialists who are MVUC members. We will schedule another meeting in December if there's interest (date not available at this writing—stay tuned).¶

If MVUC can do anything more to support and assist anyone in our community, please let Rev. Kate or me know—in confidence—what MVUC might be able to do for you. Call us, email us, talk to us in person, or leave a note in our mailboxes at the Church.¶

There will be a special Congregational Meeting on Sunday December 6 at 12:30 pm in the Chapel following the second service. We will vote on a proposal to allow construction of a cell phone tower on church property. I greatly appreciate the time and efforts by Joan Darrah and others to evaluate this possibility for us, and for hosting a very informative meeting at the Church on October 18 to discuss it.¶

The cell tower is an issue for which reasonable people will have differing opinions—about aesthetics and otherwise. Some of us have concerns about the public safety risk from lack of cell phone coverage on our Hill while others may be concerned about radiation from cell towers. There is also a revenue opportunity for MVUC in a couple of years if the tower is built. Please note that a vote in favor by MVUC does *not* mean that the cell tower actually will be constructed. Fairfax County will follow its regular procedures that involve public notice and comment, and the community that surrounds our Hill will be given a voice. And the County government will have its own opinion. MVUC's interests and concerns should be considered thoughtfully nonetheless, particularly because they might lead to different decisions at this stage in the process. I am confident that we will strike the right balance because "love" and the "quest for truth" and "community" embody the covenant of MVUC. You will find useful and objective information and photos on our website. Copies of this material are also available in the Church office.¶

Page Break

10¶

FIGURE 27-8

Insert a Continuous section break at the end of columnar text to force Word to balance the columns.



Windmill

Thanks to those of you who responded to my column in the Windmill last month about support for those of us who are in career transition, perhaps having been nudged there by the challenging economy. We're had a small support group meeting on November 23 at the Church with a couple of recruiting and networking specialists who are MVUC members. We will schedule another meeting in December if there's interest (date not available at this writing—stay tuned).¶

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10¶

Summary

In this chapter you've learned about formatting columns and their dependency on section breaks. You should now be able to do the following:

- Create documents with differing numbers of columns
- Decide when to use columns as opposed to textboxes or tables
- Change column formatting using the horizontal ruler
- Place a one-column title onto a three-column document without using multiple sections
- Balance uneven columns at the end of a document or document section

CHAPTER

28

On Background

If you're a "white pages" person, you might not care much about backgrounds. Even if you like the idea of sprucing up the page a little, you might not be keen on the extra ink or toner it takes to nurture those sprucing instincts. Thanks to the Web, PDF, XPS, and other potentially paperless approaches to sharing the written word, however, ink and toner need not be considerations anymore. Much of what is published will never see a piece of paper.

Or perhaps you're one of the millions who, while liking pretty backdrops as much as the next person, don't really want text to be any harder to read than it is already. Indeed, just about any time you venture out onto the information superhighway you are blinded by headlights shining on presentations that put the sin into pre*sin*tation. You know — those oh-too-cute web pages that are clever in concept but that flunk the legibility test.

In this chapter we're going to take a look at backgrounds: how to use them, how not to use them, when to use them, and when not to use them. After all, this is a Bible, so you have to expect at least a little bit of preaching. Let's get started.

IN THIS CHAPTER

Page background

Colored background

Patterned background

Textured background

Watermarks

Page Background

There are numerous different types of page backgrounds, used to add color, personality, or information to a document. They include the following:

- **Background colors and patterns:** Used mostly for decorative purposes, to add color to presentations
- **Background pictures:** Used for decorative purposes or to add some kind of subtle message

- **Decorative watermarks:** Used to "stamp" documents with a particular trademark or symbol
- **Informative watermarks:** Used to add things like CONFIDENTIAL, DRAFT, SAMPLE, or DO NOT COPY to the background of every page of a document to prevent printed versions from being misused or misrepresented
- **Page borders:** Used mostly for aesthetic purposes to give some documents a more polished look

Printed versus Onscreen Background Colors and Images

Background colors, patterns, images, and messages can be used both on printed and non-printed documents (those designed to be viewed on a computer screen). For printed documents, more care needs to be taken so that you don't waste ink or create a mess. A practical consideration with many inkjet printers is that ink doesn't dry immediately and paper doesn't necessarily dry flat. A piece of paper saturated with ink is messy and will need to be separated from other paper to dry. It's not unusual for ink to bleed through to the back — an added problem especially when you're doing duplex printing. You can find special papers designed to withstand such printing, but they are more expensive than regular paper, adding to the cost of printing.

As a result, when designing documents to be printed you should avoid creating documents that will result in saturated paper. Even when you use toner instead of ink, saturation and other bad things can occur, causing smears, buckling, and bulging paper.

Word knows all this, and by default is set not to include background colors and images when you print. To instruct Word to include background colors and images when you print, choose Office ➪ Word Options ➪ Display. Under "Printing options," click to enable "Print background colors and images," as shown in Figure 28-1.

Tip

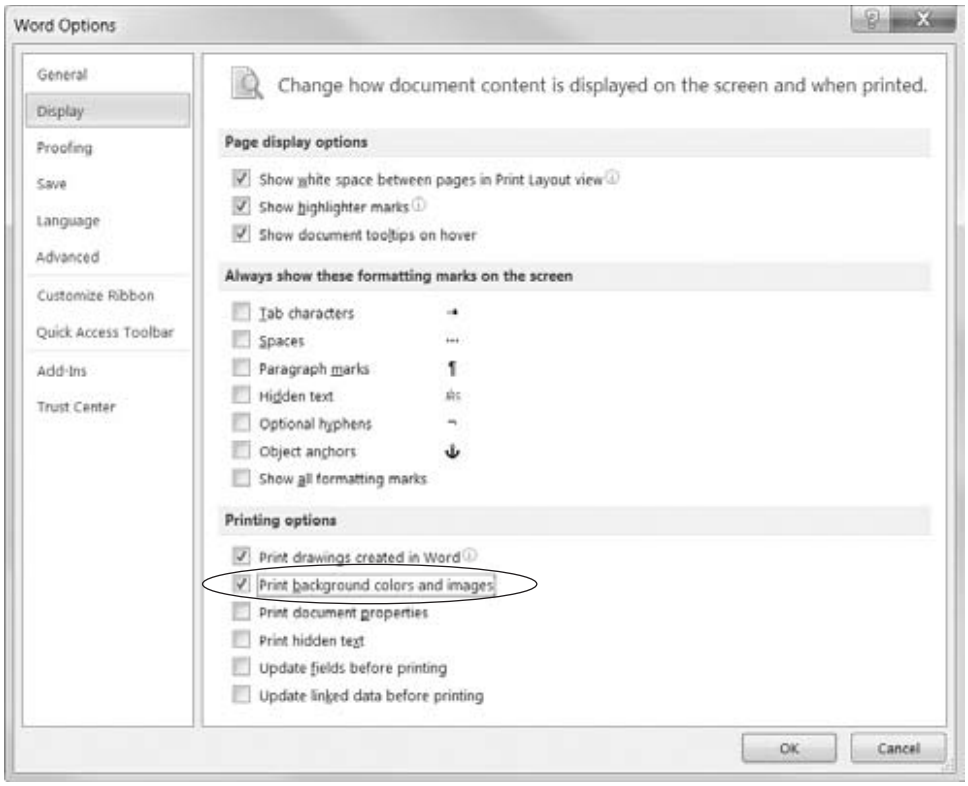
Notice the option to "Print drawings created in Word." Ordinarily you might think in terms of shapes and perhaps SmartArt. However, "drawings created in Word" includes WordArt, SmartArt, shapes, and even pictures if they have been modified for printing as a page background or watermark. To fully enable printing of all background colors, images, and watermarks, enable both of these options. By the same token, to prevent the printing of background colors, images, and watermarks, remove the checkmarks to disable both of these options. ■

For documents designed to be read on the computer screen, ink and paper aren't a concern. These include documents that "live" on the Internet or on an intranet as various flavors of HTML files, as PDF or XPS files, or even as regular Word documents.

What is a concern with onscreen documents, however, is legibility. Art is important, but so is being able to read what's written. If the color combinations are so bad that they induce eyestrain, or if text gets utterly lost in a background pattern or image, your document won't live up to its potential to communicate via the written word. If you're deliberately trying to obscure the message, on the other hand — a busy background image might be just the ticket.

FIGURE 28-1

To enable background colors and images to print, enable ''Print background colors and images,'' which is turned off by default. ''Print drawings created in Word'' is enabled by default.



Background versus Watermark

It's important to understand the difference between page background and watermarks. Page background is a document-wide setting. You set the page background using the Page Color tool in the Page Background section of the Page Layout ribbon. You can have only one page background setting in any given document, and the identical page background will appear on every page.

A watermark, on the other hand, is a section-formatting setting. While it's common to have only a single watermark in any given document and to have the identical watermark on every page, it is by no means required. Sufficient diligence and patience, blended with exuberance and obsession, could yield a 200-page document with a different watermark on every single page. Why would you do this? To prove that diligence and patience aren't a barrier to exuberance and obsession, of course!

It's important to know that one is a document-wide setting and the other is a section-formatting attribute because it can keep you from beating your head against the wall trying to set a different background for each page using the Page Color tool. If you want a different background for each page, you can arrange it, but not using the Page Color tool.

Background Colors, Patterns, and Textures

Word 2010 provides a variety of colors, patterns, gradients, and textures for use as document backgrounds. In addition, you can use pictures in any of the graphics formats supported. Formats supported include the graphics filters that come with Office 2010, those installed for earlier versions of Office, and as some installed with other Windows programs.

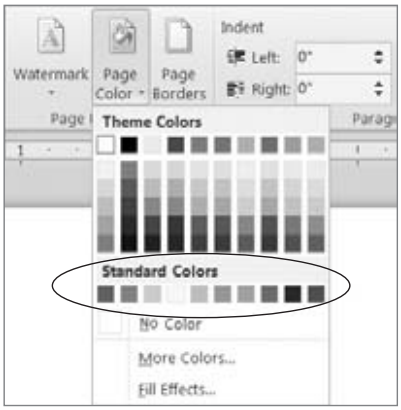
The backgrounds discussed in this section are applied to the entire document, not to specific document sections. Therefore, whatever you use should be coordinated with text and other graphics in all parts of the document.

Colors

To change the background color (which by default is set to No Color), click Page Color in the Page Layout ribbon. This displays the palette shown in Figure 28-2. If you want your background to vary with changes in theme, pick one of the theme colors shown. If you don't want your background to change when you change themes, choose from Standard Colors or click More Colors. To remove background color at any time, return to Page Color in the Page Layout ribbon and choose No Color.

FIGURE 28-2

To bypass themes, choose from Standard Colors or click More Colors.

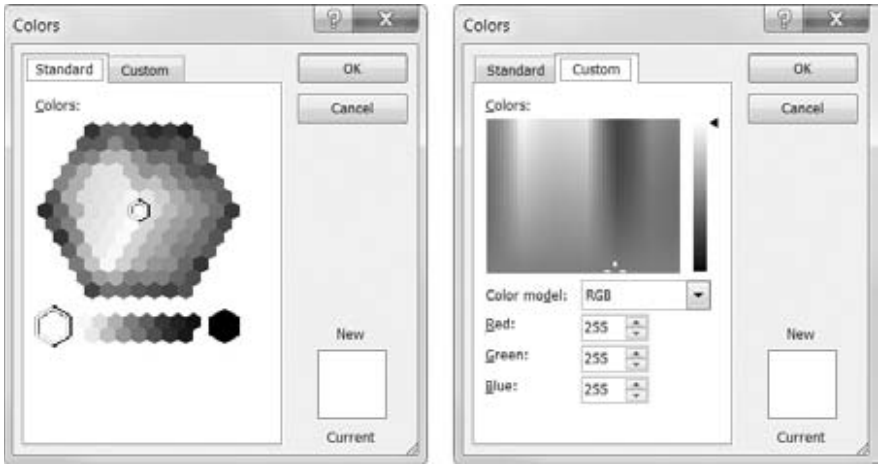


More Colors

If the Standard Colors don't provide the color you're looking for, click More Colors to display the Standard and Custom colors shown in Figure 28-3. Standard enables you to choose from among 144 colors and shades of gray. For both Standard and Custom, the New and Current indicator shows both the current background and the background you'll get by clicking OK.

FIGURE 28-3

Custom Colors provides access to up to 16,777,216 colors (that's 256^3 if you're interested). To set a custom color, click in the Colors area and drag. When you get close you can use the slide tool to choose different shades of the selected color. Drag the triangle up or down to select the shade you want.



Note

If you're trying to match an exact color, the Custom tab enables you to choose between two schemes: RGB (Red, Green, Blue) and HSL (Hue, Saturation, Luminance). Enter the numbers corresponding to the color you want and click OK. ■

Colors and Themes

There are two general approaches to applying color backgrounds. The first approach is to apply colors that use theme information, in which case colors and other elements will change when you apply different themes, as discussed in Chapter 31. The second approach is to ignore themes.

This might sound harsh, but themes are there for your convenience. If you use theme elements for different aspects of your documents, that's fine. If you consider themes irrelevant, that's fine too. If you choose to ignore themes, however, then make sure you really ignore them.

For example, in the default Office theme, Text 2 is a shade of blue with RGB values of 31, 73, and 125. If you like that color for a background, but don't want theme settings to mess with it later, don't use Page Color ➪ Dark Blue, Text 2 setting to set your background color.

To set the color in a way that is immune to theme changes, first select it using the theme color you want. Then click Page Color ➪ More Colors ➪ Custom. Once there, make a slight change in the color by setting one of the Red, Green, or Blue numbers one notch higher or lower and then returning it to the original value. This convinces Word that you've made a change when you haven't, but, more important, it makes Word think you applied a non-theme color. Then click OK.

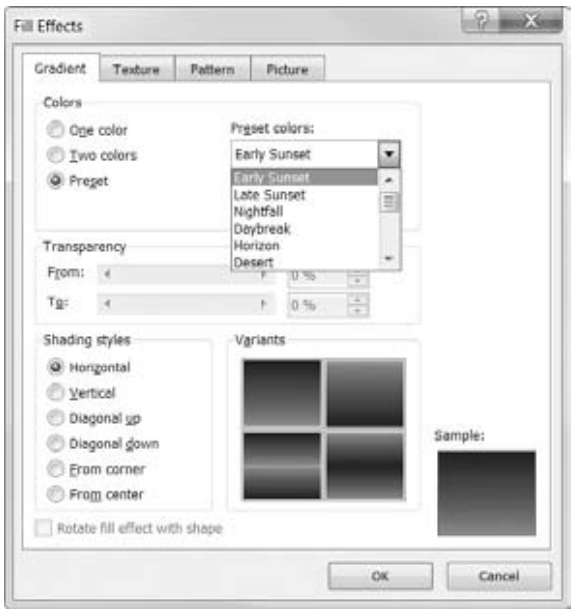
The result is that you've set a custom color that happens to be the same as one of the theme colors, but because you used the Custom color dialog box to do it, it is now not connected with any particular theme, and will stay put when and if you change the overall theme or theme colors.

Gradient

Gradient or *image gradient* is a term that refers to the gradual blending of colors, not unlike those shown in the Custom tab of the Colors dialog box (refer to Figure 28-3). To set a gradient page background, in the Page Layout ribbon, choose Page Color ➪ Fill Effects ➪ Gradient tab, which displays the dialog box shown in Figure 28-4. When you first choose this dialog box, the initial offering is based on the current page's background setting. If you haven't yet applied any color, you'll see gradients based on black and white (i.e., shades of gray).

FIGURE 28-4

A gradient document background can be a color of a blend of two colors, or a choice of 24 preset combinations.



If the base color(s) of the displayed gradients aren't to your liking, click to enable "One color," "Two colors," or Preset. Options change depending on what you select. Under "Shading styles," you can choose from six variants.

Note

Notice that Transparency is grayed out as unavailable. That's because it doesn't work for page backgrounds, as the background is by definition at the back. There's nothing behind it, so transparency is irrelevant. It *is* enabled when you set the fill for shapes, for example, which can be in any graphic layer of a document, and for which transparency is therefore quite relevant. ■

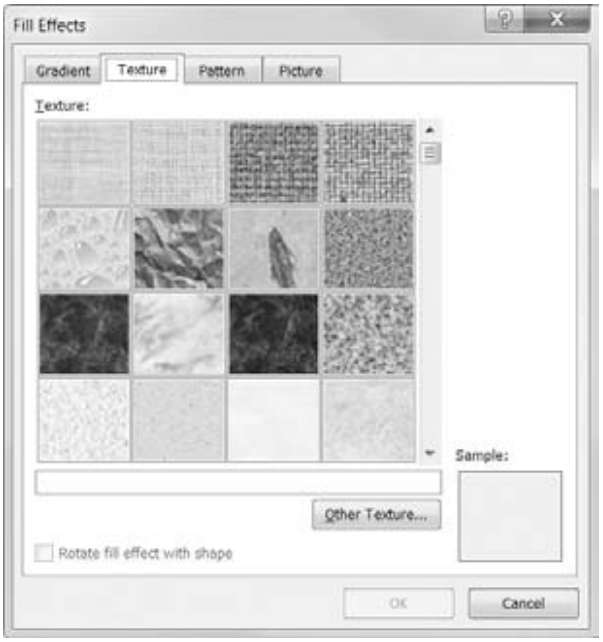
Texture

Texture refers to a variety of different backgrounds — everything from wood to different fabrics to marble. Word offers 24 built-in textures and enables you to insert your own from existing graphics/picture files.

To use a texture as your page background, in the Page Layout ribbon, choose Page Color ➪ Fill Effects ➪ Texture tab, which displays the dialog box shown in Figure 28-5. Pick a texture and click OK, or click Other Texture to load a picture file as a texture. When you do this the picture is temporarily added to the list of textures shown. To actually use the picture you need to click it once it's in the Texture gallery, and then click OK.

FIGURE 28-5

You can choose from 24 built-in textures, or click Other Texture to use a file of your own.



Note

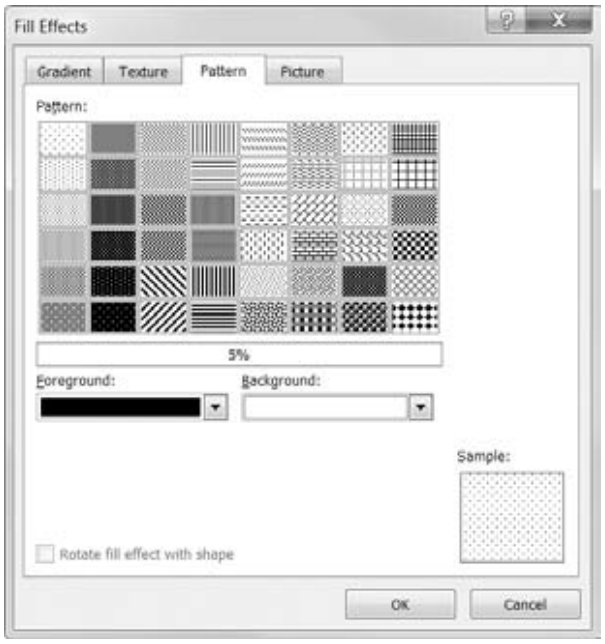
When you choose a picture file to use for a texture, depending on the size and resolution, Word may tile the image. This means that if the image isn't large enough to fill the space, multiple copies will be used. With a small graphic you might end up with hundreds of that image as your background. For tiling to work, the edges need to be designed so that they blend seamlessly (unless you want your background to look tiled). Otherwise the image has to be large enough that tiling isn't necessary. ■

Pattern

Word provides 48 preset patterns you can use for the background. To use a pattern for your page background, choose Page Color ➪ Fill Effects ➪ Pattern tab, which displays the dialog box shown in Figure 28-6. Click the desired pattern, choose Foreground and Background colors, if desired, and then click OK.

FIGURE 28-6

By combining different colors with Word's 48 built-in patterns, you can create literally millions of different backgrounds.



Picture

The fourth background option is to use a picture. The result and the considerations involved are identical to those for setting a background texture. To use a picture as your document background, in the Page Layout ribbon, choose Page Color ➪ Fill Effects ➪ Picture tab. Click Select Picture, navigate to the desired picture and select it, click Insert, and then back in the Fill Effects dialog box, click OK.

Watermarks

A *watermark* is a special faded graphic that appears underneath the document text, usually on every page of a document. It might contain a picture or text, such as the huge word CONFIDENTIAL.

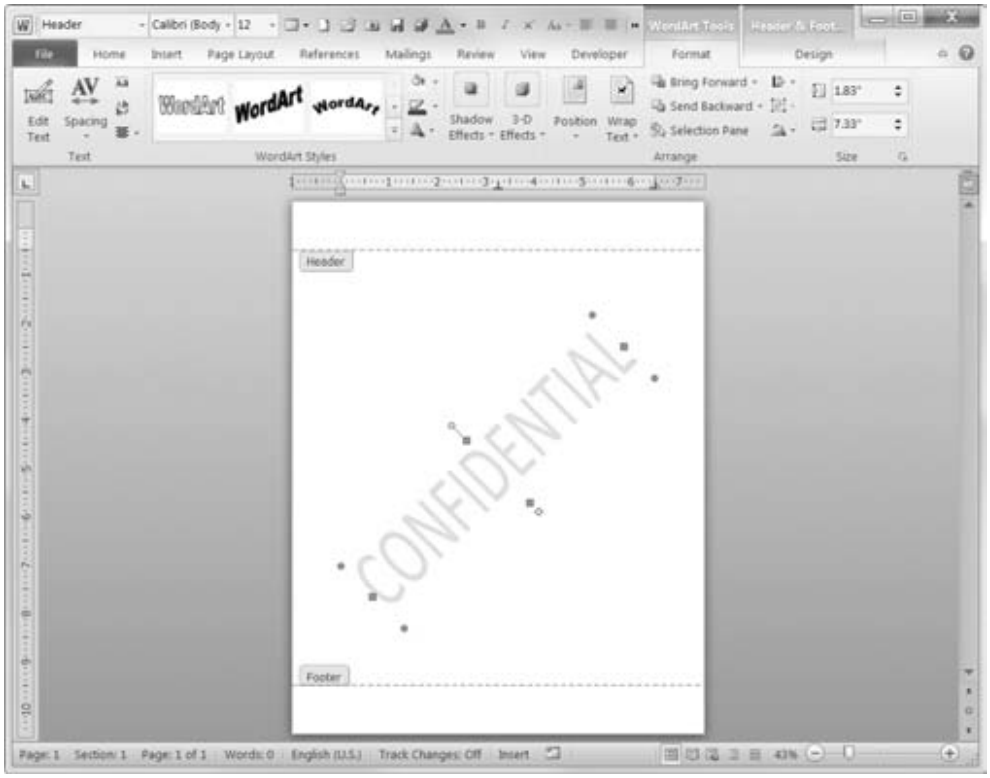
Preset Watermarks

To insert a prefabricated text watermark, in the Page Layout tab, click Watermark. Word 2010 provides a dozen or more ready-made watermarks. Browse the Watermarks gallery and see if there's one that suits your needs. Click it to insert it. It now appears as the backdrop for your document. If you want a text watermark other than what you see in the Watermarks gallery, skip down to Other Text Watermarks.

As shown in Figure 28-7, the watermark actually is a WordArt object. To mold this into exactly what you want see Chapter 22.

FIGURE 28-7

Word 2010 uses WordArt as the source for ready-made text watermarks.



Other Text Watermarks

If the Building Blocks Gallery doesn't have a preset text watermark that suits your needs, you can insert and then edit an existing one using the WordArt tools shown in Chapter 22, or you can use the Watermark tool.

To insert a text Watermark using the Watermark tool, in the Page Layout Ribbon, choose Watermark ➪ Custom Watermarks ➪ "Text watermark," to display the Printed Watermark dialog box, shown in Figure 28-8. Use the Text drop-down list to see if the text you want is already there. If not, click in the Text box and type your own.

FIGURE 28-8

If you have other languages installed, Word can insert a variety of preset text watermarks in those languages, or you can type your own message.



Choose the desired font, color, and layout, and decide whether you want the watermark to be semitransparent or solid (the unwritten alternative). For Size, you're generally best off leaving it set to Auto, as that will choose the largest possible font that works for the chosen text and the current paper/margin sizes.

While the Printed Watermark dialog box doesn't provide live preview, it does let you click Apply without closing the dialog box so you can get an idea of what the watermark will look like. When you click Apply, the Cancel button turns into a Close button. Hence, once you've clicked Apply, the change has been made in your document. If necessary, make changes until you're satisfied, and click Apply again. Click OK or Close when you're done. Pressing Ctrl+Z (Undo) once the Printed Watermark dialog box has been dismissed will undo only the most recent change. If you clicked Apply more than once while experimenting, it will take multiple presses of Ctrl+Z to get you back to where you were before you displayed the Printed Watermark dialog box.

Picture Watermarks

To use a picture for your watermark, click to select "Picture watermark" in the Printed Watermark dialog box. Click Select Picture, navigate to the desired folder, click the picture you want to use, and then click Insert. Back in the Printed Watermark dialog box, set the desired scale and choose Washout, unless your picture is already suitably light. As before, you can click Apply to see if the picture appears as you want, changing pictures or options until you're satisfied. Clicking Apply changes the Cancel button into a Close button. When you're ready, choose OK or Close.

Removing Watermarks and Page Backgrounds

Word 2010 has a search-and-destroy system for zapping watermarks. When you want to remove a watermark, in the Page Layout ribbon, click Watermark ➪ Remove Watermark. Or, if you want a longer method, choose Watermark ➪ Custom Watermarks ➪ No Watermark, and click OK.

If you try to remove a watermark and it doesn't go away, it's not a watermark. It's probably a page background instead. To remove a page background — even if it's a picture, gradient, or pattern — in the Page Layout ribbon, choose Page Color ➪ No Color.

Summary

In this chapter you've learned how to create a variety of page backgrounds for your documents. You've also seen that you need to be careful to maintain a balance between art and legibility. You should now be able to do the following:

- Create colored backgrounds and control whether or not Word prints them
- Distinguish between page backgrounds and watermarks
- Match a page background color exactly by using RGB or HSL settings
- Quickly remove a watermark or a page background

CHAPTER 29

Publishing as PDF and XPS

In this chapter we look at Word's ability to save files in either of two competing printer-ready formats: PDF and XPS. Each is a more or less open file format that aspires to be the industry standard for distributing documents in such a way that they appear identical to the reader regardless of platform — PC, Macintosh, Unix, Linux, and so on.

Furthermore, when the resulting files are printed, regardless of what kind of computer or operating system is being used, the printed results should be more or less identical. While 100% identical under a magnifying glass is a bit too much to hope for, PDF and XPS do basically succeed in both missions. Whether the documents are viewed onscreen or printed, all readers provide essentially the same reading experience. Yes, there are always going to be variations caused by hardware capabilities, but to the extent possible, those variations are minimal.

IN THIS CHAPTER

PDF: Word 2010 versus Adobe

XPS versus PDF

Creating and viewing PDF files

Creating and viewing XPS files

What Is PDF?

PDF stands for *portable document format*. It is an open-standard file format owned and developed by Adobe Systems. PDF is designed so that any given document looks identical regardless of the operating system and other software used to display or print it.

A Word document you send to someone else will look different depending on answers to a variety of questions, including the following:

- Does he have Word or is he using different software to view the document? Even if he has Word, is it running under Windows or on a Mac? It makes a difference.
- Does he have the template on which the document was based?

- What printer driver is installed?
- Does he have the fonts needed to display the file?
- If the file contains graphics, does he have the filters needed to display those graphics?

PDF is designed to make these questions irrelevant. Each PDF file contains everything that's needed to completely display/render the file so that it looks reasonably identical for each person who views it, regardless of operating system or computer hardware. PDF also enables you to encrypt and password-protect a document so that it can be read only by those with the password, preventing it from being copied, printed, modified (even with Adobe Acrobat Professional, the premier PDF-authoring program), and so on.

Caution

Word's ability to create PDF output does not extend to all security capabilities. When you save a PDF version of a file from Word, you will not be able to forbid certain kinds of access to the file. For that you would need to use Adobe Acrobat or another program that includes the capability to set permissions in PDF files. When you attempt to save a protected Word file as a PDF, you will see the warning shown in Figure 29-1. Keep this in mind before attempting to distribute protected files you own as PDF files. ■

FIGURE 29-1

When you save permission-restricted Word documents as PDF files, any restrictions are removed.



Viewing PDF Files

To view PDF files you need a PDF reader, such as the free programs from Foxit and Adobe. PDF files can also be read with Adobe Acrobat Standard or Professional, but if you already had one of those you probably wouldn't be reading this section. Free readers can be obtained from `www.foxitsoftware.com` and `www.adobe.com`. There are other free readers, as well — just search the Internet for "free pdf reader" and you'll find several.

What Is XPS?

XPS stands for *XML paper specification*. In its early form it was code-named Metro by Microsoft, so you might know it by that name. It is Microsoft's response to PDF — intended to provide a computer-independent method for distributing files so that they look the same to anyone who opens them for viewing or for printing. XPS is a potential competitor of PDF, but perhaps only in the long term.

At this point XPS has made few inroads, and has been hampered by its relative obscurity. In creating XPS documents from Office 2010, XPS is also hampered by its dependency upon the .NET Framework. The .NET Framework is included in Windows 7 and Vista, but it needs to be installed as a separate component in Windows XP. Installation isn't difficult, but it does take a good deal longer than many other system enhancements.

Unlike when you create PDF files from Office 2010, however, when you create XPS files permissions *can* be transferred to them, as shown at the bottom of Figure 29-2. That's the good news.

FIGURE 29-2

You can transfer permissions and restrictions to XPS files you create.



Viewing XPS Files

Like PDF, the XPS format is not natively supported by earlier versions of Windows or by non-Windows operating systems. To view XPS files you might need to install a reader or viewer. So don't count on XPS files having the same currency as PDF files. On the other hand, if you're using Windows 7, XPS files can be viewed without your having to install anything futher.

If you need a viewer, at least two viewers are available from Microsoft. Both currently are available at the following URL: `www.microsoft.com/whdc/xps/viewxps.mspx`. If you don't find options listed at that link, there should be a Search box near the top of the web page. Type **xps viewer** into the Search box and press Enter.

Office 2010 Support for PDF and XPS

To enable support for PDF and XPS formats in Word 2007 and other Office 2007 programs, you needed to install a free patch that added these capabilities. You do not need to do this in Office 2010 — PDF and XPS capabilities are built in to Office 2010.

Deciding Which Format to Use

If you need to create documents for the widest possible audience, at this time at least, the decision is a no-brainer: PDF. If you are distributing documents for a more controlled environment in which document permissions are being set, and if the full Adobe Acrobat isn't available for password-protecting PDF files, then XPS might be the way to go.

How Good Is Word 2010's Built-In PDF Capability?

On the Internet, there's an abbreviation: YMMV. It stands for *your mileage may vary,* a catchall that reflects the different results that different people get. Different results occur for a variety of reasons, not the least of which being that perceptions are different, as are raw materials.

The only way to determine whether Word 2010's PDF capability works for your documents is to try it. Does the resulting PDF look the way you expect it to look? Is it legible? Are the colors correct? Is anything missing or distorted? Are all of the graphics — including borders — present and accounted for? Is the file size acceptable?

Of course, if you have Adobe Acrobat or other PDF-writing software, you can try it several ways and compare the results. Setting Primo PDF (a free PDF creator that installs as a printer driver) and Word 2010 to yield high-quality camera-ready results that were as similar as possible, I used both to convert a Word file to PDF. The resulting PDF files were close in quality, but not identical. Printing sample pages from each and holding them under a strong lamp revealed no easily discernable differences — although some were detectable under a magnifying glass. For onscreen viewing, however, the PDF file produced using Word 2010 was easier to read. In particular, the fonts rendered by Word were somewhat sharper.

As far as YMMV goes, documents differ. It might well be that with tables, SmartArt, WordArt, and a variety of other document elements, Adobe or Primo PDF will be out-performed by Word. Similarly, it might be the case that there are document elements for which Word fails miserably. If you have Word 2010, you have a built-in means of creating PDF files. So try it and see whether it gives you what you want. If it doesn't, try something else. There are several free PDF

creators on the Internet, and if you believe that you get what you pay for, Adobe and a few others will be happy to take your money, which will allow you to make a fully-informed and paid-for choice.

Creating PDF Output

Creating PDF documents from Word is as easy as saving a file, albeit not quite as fast. ChooseFile ➪ Save & Send ➪ Create PDF/XPS Document ➪ Create a PDF/XPS, as shown in Figure 29-3.

FIGURE 29-3

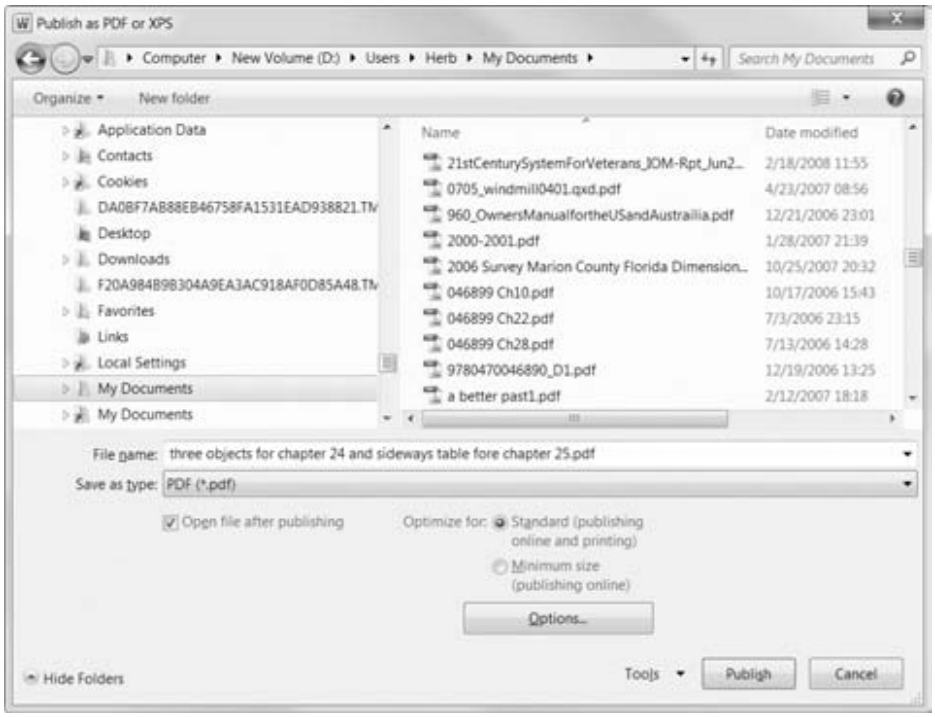
Getting to Create a PDF/XPS is not an ergonomic exercise.



In the "Publish as PDF or XPS" dialog box, shown in Figure 29-4, set "Save as type" to PDF (`*.pdf`). Type a name for the file if the one suggested isn't acceptable. If you want to preview the resulting PDF file, click to enable "Open file after publishing." The file will be opened by the default PDF viewer. (If this option is grayed out, then your default PDF viewer either does not exist or is not installed correctly.)

FIGURE 29-4

It's always a good idea to view the resulting PDF file and to compare different alternatives to ensure that your choice is acceptable.



Note the choice between Standard and "Minimum size." Graphics typically do not need resolutions above the current screen's DPI (usually 96) for display onscreen, whereas considerably higher resolutions are needed for quality printing. If the document won't be printed, you can save storage space by choosing "Minimum size." It's never a bad idea, however, to compare the two results to ensure that there aren't unacceptable differences in quality.

Click Options to view additional settings, shown in Figure 29-5. You generally will find that the ISO 19005-1-compliant option produces files that are significantly larger (often as much as 80% larger) than those produced by the "Bitmap text when fonts may not be embedded" option. At the same time, the fidelity is greater as well. Note that using the ISO option grays out the "Document properties," "Bitmap text . . . ," and "Encrypt the document . . . " options. Choose other options as needed, click OK, and then click OK again in the "Publish as PDF or XPS" dialog box.

Tip

If you use PDF format often, you can save steps by adding "Publish as PDF or XPS" to your Quick Access Toolbar. Right-click the QAT and choose Customize Quick Access Toolbar. Set Choose commands from to All Commands. Scroll down to "Publish as PDF or XPS" and click Add ➪ OK. ■

FIGURE 29-5

Word 2010 defaults to ''Bitmap text when fonts may not be embedded.''



Creating XPS Output

To save in XPS format, in the "Publish as PDF or XPS" dialog box, set "Save as type" to XPS. When saving as XPS you are afforded the same options as those shown in Figure 29-4 for PDF format. Type a name for the file if the one suggested isn't acceptable. Click Options to display the slightly different Options dialog box shown in Figure 29-6. Unlike when saving the PDF version of a file, you can preserve restricted permissions settings when saving in XPS format (if, as in this case, the Word file has restricted permissions enabled — otherwise, this option will be grayed-out). Select any options you need, click OK, and then click OK again in the "Publish as PDF or XPS" dialog to complete the save.

Note

Depending on your version of Windows, Word may prompt you to install the .NET Framework when saving in XPS format. As noted earlier, .NET Framework takes a bit longer to download and install than many other add-ins. At this writing, the download is about 30 MB. Even on a fairly fast computer, installation took 15 to 20 minutes of crunching time. There aren't any decisions to make — installation simply takes a long time. If you want to save in XPS format, there is no alternative. However, don't choose this option when you're in a hurry. Install the .NET Framework now and beat the rush. If you're using Windows 7, don't sweat it — .NET Framework is part of the OS. ■

FIGURE 29-6

If the document contains rights-management (permissions) settings, you can preserve those settings when saving in XPS format.



Summary

In this chapter you've explored the difference between PDF files and XPS files. While PDF is far and away the more popular format, XPS offers the advantage of letting you preserve your rights-management settings. You should now be able to do the following:

- Decide whether to use PDF or XPS format
- Decide whether to use higher-quality or lower-file-size PDF or XPS files
- Surf the Web to find free viewers for PDF and XPS files (if needed)
- Analyze PDF file quality to determine whether to use Office 2010 or some other means to create PDF files

CHAPTER 30

Blogging and Publishing as HTML

This chapter looks at publishing for the Web in the form of HTML (hypertext markup language) and blogging (short for web logging, a web log being a journal published to the Web). Of these, blogging — is really the only arguably good use of Word's talents.

While Microsoft has put a lot of effort into including HTML in Office and Word, the truth is that there are other programs that are much better at HTML — from an authoring standpoint, from a publishing standpoint, and from a maintenance standpoint. Moreover, Word has rightfully earned a reputation in the HTML world for producing slow and bloated HTML documents that are frankly embarrassing, although there are some things you can do to reduce the bloat, and you'll learn about them in this chapter. At the end of the day, however, if you really need HTML, you need something other than Word — something such as SharePoint Designer, Microsoft Expression Web, Dreamweaver, or something else.

HTML is an endlessly deep subject about which a great many books have been written. Doing any sort of justice to it is well beyond the scope of the *Word 2010 Bible*. This chapter will show you what you need to know about Word's HTML — which is mostly to avoid using it.

IN THIS CHAPTER

Publishing as HTML

What's so bad about Word's HTML?

Saving as XML

XML structures, schemas, and transforms

Blogging from Word

What Happened to XML?

Because of a patent-infringement lawsuit, Microsoft removed most of the useful XML-editing capabilities from Word 2010 while Office 2010 was being developed. An "update" to Word 2007 removed XML-editing from it, as well. With useful XML-editing removed from Word, the author and editors decided to remove coverage from this book.

HTML

HTML (hypertext markup language) is the primary language of the Internet. Why *markup?* Imagine that you have some text that someone has edited or *marked up* to indicate which words are bold, which are italicized, which are larger, and so on. The markup aspect of HTML involves the insertion of tags that tell a web browser how to display the text.

Suppose, for example, that a browser, such as Internet Explorer, Netscape, or Firefox, encounters the following:

```
<b>This</b> is a <i>test</i>.
```

The bits between <angle brackets> are called *tags*. is a tag that means bold. <i> means italics. The tag means "begin bold"; means "end bold." The tags tell the browser where certain kinds of formatting begin and end. For example, a browser would display the preceding example line as follows:

This is a *test*.

Tags also are used to perform other chores, such as displaying pictures or hyperlinks, the beginning and ending of paragraphs, numbering, bullets, centering, and a variety of other attributes. The word *hyperlink* is where the *hyper* part of HTML's name comes from. Clicking a hyperlink causes a browser or other HTML-content displayer to jump to that link. Hyperlinks have revolutionized the way people use computers over the past two decades. (If you want to learn how to code HTML, sources abound, including many free resources on the Web. A simple search will lead you in directions and to places that this book isn't going.)

What's So Bad about Word's HTML?

Using Word to create HTML is tempting, especially if it's the only means you have for doing so. It's easy. Just save any file in HTML format. Nothing could be easier.

However, that's where the advantages begin and end. Why? Let's begin with a simple example. Consider the "Hello, Word." doc verus docx size experiment we performed in Chapter 5. The raw truth is that if you put that phrase into a text file and name the file `hello.htm`, any web browser can display it. You don't need anything other than those 12 characters. Yes, there are additional elements that browsers want to see, but there's a difference between wanting and needing.

If you use SharePoint Designer and feed it those 12 characters, it's not quite so frugal, but it's not so bad. Here's what you get:

```
    <title>Untitled 2</title>
    </head>
    <body>
    <p>Hello, Word.</p>
    </body>
    </html>
```

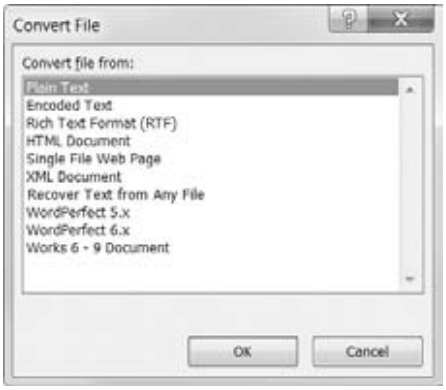
SharePoint Designer is designed to produce HTML, so we would expect it to be good at what it's designed to do.

Now, let's press Ctrl+N in Word to start a new Document window and try the same thing. Type **Hello, Word.**, and then choose Office ➪ Save As, set "Save as type" to "Web Page (*.htm; *.html)," accept the proposed name (`Hello`), and click Save. To see what this file really looks like, you now need to open it as a text file.

There are a number of ways to do that, but the easiest way is to tell Word to confirm conversions when opening such files, and specify that it should open them as plain text. Choose File ➪ Options ➪ Advanced. In the General settings, click to enable "Confirm file format conversion on open." Now choose File ➪ Recent and click `hello.htm`, which should still be at the top of the unpinned Recent Documents list (unless you pinned it for some reason). In the Convert File dialog box, set "Convert file from" to Plain Text, as shown in Figure 30-1, and then click OK.

FIGURE 30-1

To see the source for an HTML file, open that file as a plain-text file.

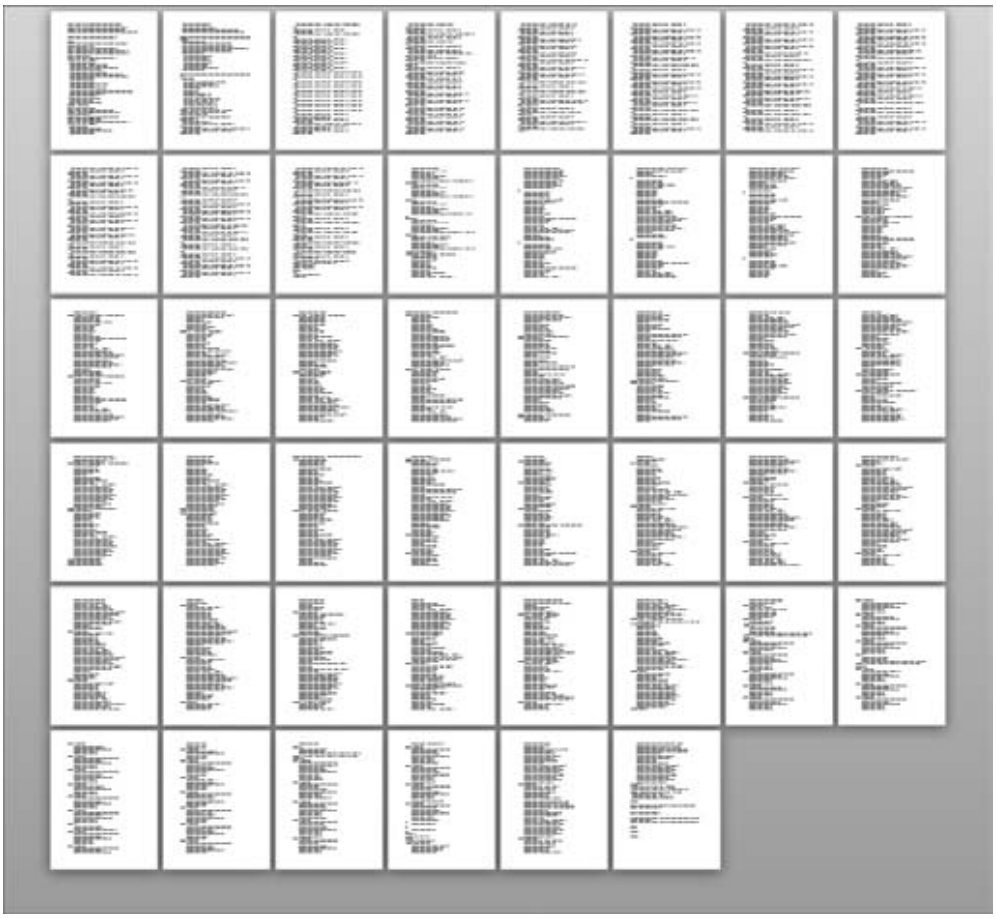


Remember that simple phrase "Hello, Word."? Converted into HTML by Word, it now has over 61,000 characters, and takes up about 46 pages, shown at 10% zoom in Figure 30-2. But that's not the end of the story. At the same time, Word also created a folder named `Hello_files`, which contains five additional files — the infrastructure for a much more complex HTML file than the one we created.

In fairness to Word, we didn't use the optimal approach to saving HTML. Just below the Web Page option is another option called Web Page, Filtered. If you choose that option, "Hello, Word." now becomes just over 11,000 characters that consume about 12 pages. This still isn't what anyone would call "compact code," although it is quite a bit better than the 61,000-plus-character monstrosity.

FIGURE 30-2

Word converts a 12-character text message into a 46-page HTML file.



Tip

To eliminate even more unnecessary HTML baggage and complicated HTML codes, tell Word not to use some of its denser HTML options. Choose File ➪ Options ➪ Advanced ➪ Web Options (near the bottom of the dialog). In the Web Options dialog box, select the Browsers tab and set Target Browsers to "Microsoft Internet Explorer 4.0 or later" — that will eliminate a lot of the more advanced tags that Word might ordinarily insert. Under Options, ensure that "Disable features not supported by these browsers" is enabled, that "Rely on CSS" is unchecked, and that "Save new Web pages as Single File Web Pages" is checked. ■

Feel free to delete the clutter we just created. You won't be needing `hello.htm` or its companion folder `Hello_files`.

What Is MHTML?

If you're curious and expanded the "Save as type" listing when saving `Hello.htm`, you probably noticed another format called "Single File Web Page (*.mht,*.mhtml)", just above Web Page, as shown in Figure 30-3. MHTML stands for MIME HTML. MIME (Multipurpose Internet Mail Extensions) is the standard format in which e-mail is sent over the Internet. Its specification includes the capability to encode graphics and other binary attachments into plain text so they can be transmitted over older computers that support only plain text (the original 128 characters known as ASCII, or American Standard Code for Information Interchange).

FIGURE 30-3

Word lets you save graphics and other externally linked files into a MIME-encoded HTML file, or MHTML.



The idea here is that if you have pictures, sound files, or other binary content, it's often better to encapsulate them within the body of the HTML file itself so that when you e-mail the file to someone, the recipient will have all the ingredients needed to properly display it.

While MIME itself is a standard format, MHTML is an emerging standard. That means that not every browser will display the same MHTML file identically. Apart from that, it might make a pretty nice alternative to the PDF and XPS files discussed in Chapter 29.

Blogging

Word 2010 enables you to publish to some blogs. One imagines that the capabilities will expand to include more blogs as time goes by and as additional blog servers become Office 2010-compatible. For now, however, if you happen to use any of the supported blog servers, you're in luck.

There are at least a couple of ways to blog from Word. One way is to deliberately begin a Word document with the intention of publishing it to a blog. Another way is to start with an ordinary document (new or existing) and tell Word to publish it as a blog.

Let's start the 100% kosher way. Choose File ➪ New. Under Available Templates, click "Blog post," and then click Create, as shown in Figure 30-4.

FIGURE 30-4

Use File ➪ New ➪ ''Blog post'' ➪ Create to begin a new blog post.



Registration

If you don't have any existing blog accounts that Word 2010 knows about, you will be prompted to register one, as shown in Figure 30-5. Click Register Now if you already have one but need to tell Word about it. If you don't have one, click the Office.com link for a list of supported blogs, set up a blog account somewhere, and then come back to continue. Back? Good!

Note

Several blog hosts are available, and many offer free blogging accounts (some have paid versions that offer additional services). Don't be afraid to explore and experiment. Hosts include `www.blogger.com`,

`http://spaces.live.com`, `www.livejournal.com` and many others. If your company has a SharePoint server you might have free blogging capabilities there as well. Ask your IT manager (but see the Caution later in this chapter about personal versus business blogs). ■

FIGURE 30-5

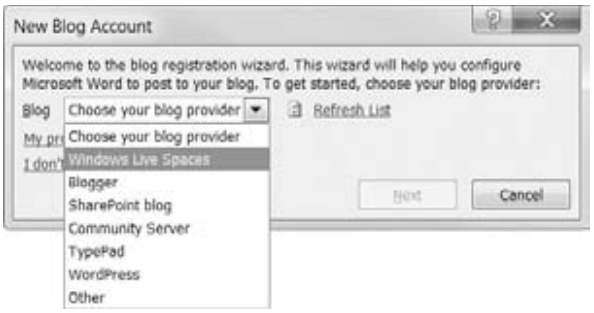
If you haven't registered a blog account, sooner or later you will need to.



In the New Blog Account dialog box, shown in Figure 30-6, use the drop-down list to select your provider. If your provider isn't listed, setup will be more difficult and publishing might not work. If your blog host has a Help section or an FAQ (frequently asked questions), surf in that direction to obtain the setup details.

FIGURE 30-6

Word 2010 ''knows'' about a variety of popular blogging hosts or servers.



At this point procedures vary depending on which host you choose. Here we'll go through the steps for setting up a Windows Live (formerly MSN Spaces) blog. Choose your blog and then click Next. For Windows Live you'll enter the name of your space, as shown in Figure 30-7. If you access your Windows Live account using `name.spaces.live.com`, then the Space Name field will contain only *name*, without the `spaces.live.com`.

Note

For some blogs you need to provide a password. For Windows Live you supply the Secret Word you set. If you don't remember your Secret Word, maybe you didn't set one. If you're a Groucho Marx *You Bet Your Life* fan, you're probably looking for a duck to drop down. Sorry, no duck. To set your Secret Word — and for a hint about how Word 2010 publishes to the Windows Live blog — log on to your Windows Live account and click Settings ➪ E-mail Publishing. Click the "Turn on e-mail publishing" checkbox. In Step 2, provide one or more e-mail addresses from which you will be blogging (if you can send e-mail from your cell phone, you can blog from your cell phone). In Step 3, type a Secret Word. Finish steps 4 and 5, and then click Save. Now you're all set to complete registration in Word, because now you know your *secret woid* (see Marx, Groucho). The hint? If you need to set up e-mail publishing, then that must be how Word publishes your blog entry to Windows Live. ■

FIGURE 30-7

Some blogs do not accept pictures/images except on premium accounts. To include pictures on those you need a separate server/host to which you have posting rights.



If you succeed you'll see a message box saying that account registration was successful. Click OK to start blogging!

Composing and Publishing Your Blog Entry

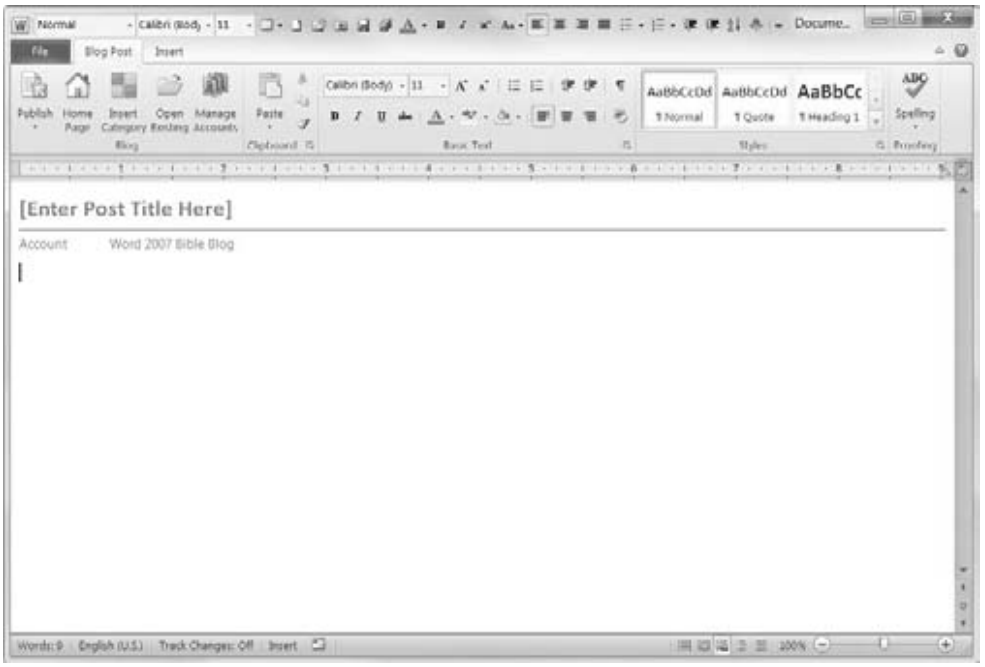
Once you've registered one or more blog accounts, when you choose File ➪ New ➪ "Blog post" ➪ Create, Word immediately displays the Blog Post ribbon and document window for composing your entry, as shown in Figure 30-8. If you have multiple accounts, use the Accounts drop-down arrow to select the one to which you want this entry posted.

Note

When you choose File ➪ New ➪ "Blog post" ➪ Create, Word opens a new document window based on the `Blog.dotx` template. See Chapter 31 for more information about templates. ■

FIGURE 30-8

Unless you don't want one, type a title for your post, type your blog entry, and then click Publish, or click the Publish drop-down arrow to choose between Publish and Publish as Draft.



To register additional accounts, or to manage existing ones, click Manage Accounts in the Blog group. In the Blog Accounts dialog box, shown in Figure 30-9, if you have multiple accounts, one will be set as the default. To change the default, select the account you want to use and then click Set As Default.

Caution

Do you have a business and a personal blog? If so, be very careful not to accidentally post to the wrong one. It's extremely easy to do, and if your blog is syndicated through RSS, there's absolutely no way to guarantee that an "Oops!" entry won't be read by someone you don't want reading it. If there's any risk of this happening, set the *least harm* blog as your default. Better still, create a throwaway blog somewhere — one that nobody else can read — and set that one as your default. That way, if you inadvertently forget to choose a destination, there's no harm done. ■

Create your post. When you're done, note that the Publish button in the ribbon is a split button. Use the top half to publish immediately. Use the bottom half to choose between Publish and Publish as Draft. When you publish you'll see a notification bar above your blog entry indicating that posting was successful, as shown in Figure 30-10.

FIGURE 30-9

Make sure your default is a safe place for anything you might accidentally post.

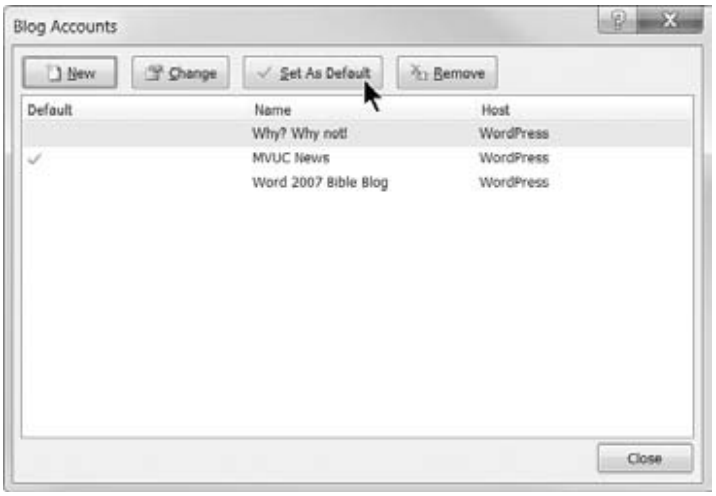
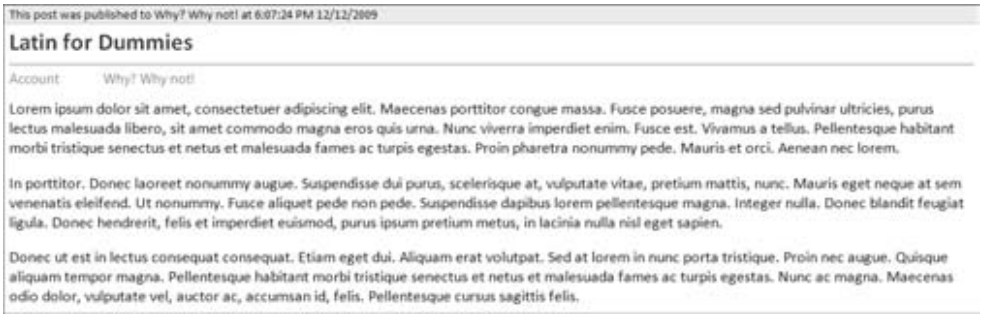


FIGURE 30-10

Word lets you know that a blog entry was successfully published. Log on to your blog account to verify that it actually worked.



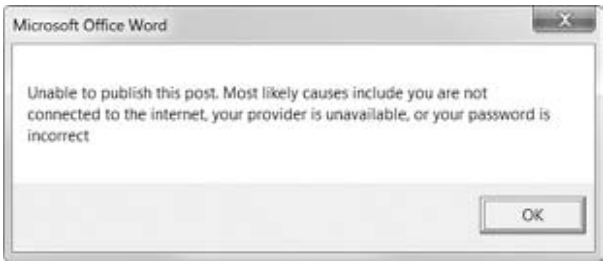
If a blog post fails you'll see something like the message box shown in Figure 30-11. Blogging from Word 2010 doesn't always work, especially when you attempt to blog to hosts that aren't on the list of hosts Word knows about (refer to Figure 30-6). If publishing fails, wait a few seconds and try again. What didn't work 10 seconds ago often works fine now.

Note

To blog from an existing Word document, choose Office ➪ Share ➪ Publish as Blog Entry ➪ Publish to Blog. Word transfers a copy of the current document into a new window. Choose your blog server and any other options, and click Publish. ■

FIGURE 30-11

During the early stages of blogging with Office 2010 you can expect to see occasional failures.



Additional Blog Tools

Other useful blog-related items in the Blog Post ribbon tab include Home Page and Insert Category — both in the Blog group, as shown in Figure 30-8. The Home Page tool opens your browser to the main web page for the currently-selected blog account.

Use the Insert Category tool if your blog supports categories for organizing your posts. Many don't. When you click Insert Category, a Category dropdown appears under the Account dropdown. Use the dropdown to choose a category. While you can type a new category name in the field, it does not appear to actually work — at least not for WordPress blogs. But, feel free to try it — you never know when an update might suddenly make it start working.

Using Open Existing to Correct and Revise

The best way to find errors in a blog is to publish the blog online, and then read it. A post you moments-ago pronounced "good-to-go" is certain to develop errors the moment you publish it. This is guaranteed. If the original publication window is still open, it's easy enough to fix the errors and click Publish to republish the posting instantly. The underlying protocols handle the details of replacing the earlier post rather than simply adding a new one.

After you've closed the Word session and the files you were working on, you might think you need to use the web interface to perform surgery on an errant post or to revise and extend your remarks. While you will need to use the web interface to delete a post you no longer want online, you do not need to run to the web to edit an existing post — as long as it still shows up in the Open Existing Post dialog box.

To edit an existing post, with a blank document onscreen, choose File ➪ Save and Send ➪ Publish as Blog Post ➪ Publish as Blog Post. Click Open Existing in the Blog section of the Blog Post ribbon tab. In the Open Existing Post dialog box, scroll to the desired post, select it, and click OK. At the top of the post, an information bar displays the publication time and date (as shown in Figure 30-10). Make any changes you see fit, and then click Publish. Word will now display the **re**-publication time and date in the information bar at the top of the post, above the title.

There is a limited number of existing posts that Word can fetch in this manner. You might be able to increase this number using your blog settings (from the web interface — not from Word). If the existing post does not show up in the Open Existing Post dialog box, however, you will need to edit the post using your web interface to make changes. Or, if you require Word's capabilities, you can sometimes trick the post into appearing in the Open Existing Post dialog box by changing the posting date using the web interface.

Summary

In this chapter you've learned about the advantages and disadvantages of using Word to create HTML files. You've also seen Word's blogging capabilities in action, and learned to blog with wild abandon. You should now be able to do the following:

- Optimize Word's settings to create the smallest and most compatible HTML files that Word can produce
- Register any of a number of popular blog hosts for blogging directly from Word
- Blog from Word 2010
- Use Open Existing to correct and revise existing blog posts

CHAPTER 31

Templates and Themes

Templates have already been mentioned over 150 times in this book, so it's probably about time that we look at them a bit more closely. Themes have also been mentioned a few times in this book, but not nearly as often. Even so, both are important elements when it comes to creating, formatting, and maintaining Word documents.

At the outset, the relationship between templates and themes needs to be made clear. One way to think about templates and themes is as different layers of formatting. (Style set, which was discussed in Chapter 9, can also be thought of as a different layer of formatting). When you create or open a document, you start with the formatting that's assigned via styles in the underlying template. The default document template in Word is `Normal.dotm`. Its default theme is Office, and its default style set is Word 2010. That's Normal Office Default. NOD, if you understand.

When you create a new Word document, you start off with the defaults assigned to the underlying template. You can then layer on top of those defaults, changes in style set, as well as changes in theme. Applying a new theme or style set doesn't change the underlying template. It merely changes certain aspects of the formatting, enabling you to quickly change the overall look of a document.

IN THIS CHAPTER

- Templates versus themes
- User templates
- Installed templates
- Online templates
- Modifying templates
- Themes
- Theme components
- Saving custom themes

What Are Templates?

It's possible to use Word without ever stopping to consider the question *What are templates?*

Encarta's first entry on templates says the following:

1. master: something that serves as a master or pattern from which other similar things can be made.

Wikipedia's sixth definition under "Computer science and information technology" (at this writing) says that a template (word processing) is the following:

A standard document containing layout and styles used to configure word processing software.

Note

Wikipedia is a free online open-source living/dynamic encyclopedia that is one of the best resources the Internet has to offer — as long as you don't believe 100% of every article. The English version can be found at `http://en.wikipedia.org`. ■

At its most basic, a template is a document that's already been started. Things common to a particular type of document are preserved in document templates. This might include text as well as preset types of formatting called *styles*. Each time you start a new document of that particular type, you can save time and effort by using a template as your starting point, rather than having to reinvent the wheel each time.

At its most complex, a template is an environment for creating and maintaining documents. Templates can contain automatic macros that swing into action each time you create, open, or close a document. That kind of template is sometimes called a *wizard*. Templates can contain other macros, keyboard assignments, and styles for working on particular kinds of documents. In this chapter, however, we're focusing more on the formatting and ready-to-use text aspects of templates. We'll come back to macros and keyboard assignments later, in Chapters 45 and 49.

It's entirely possible to use Word without being aware of templates. If you approach Word in that way, however, you're missing out on one of its strongest work-saving features. Using templates can dramatically reduce the amount of time you have to spend thinking about how to get started — because someone else has already invested the time to answer exactly that question.

Using Templates to Create New Documents

If you've never ventured into the New section of Word's Backstage view, you might be in for a bit of a shock. From the ribbon, click File ➪ New, which displays the New section of Backstage, shown in Figure 31-1. There are multiple parts and operational modes to this dialog box.

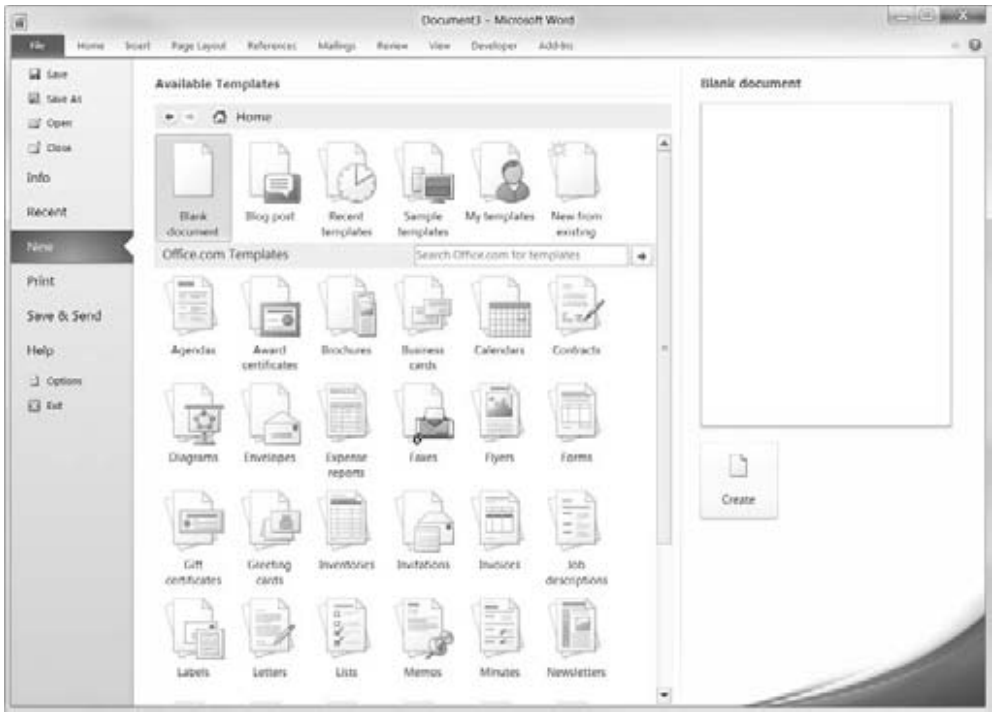
Tip

You can save a step by adding the New command to your Quick Access Toolbar. Choose File ➪ Options ➪ Quick Access Toolbar. Set Choose Commands to File tab. Click the New command, and click Add ➪ OK. Now you can display the New tab by clicking the newly added New button at the right end of the QAT. This is Word 2010's equivalent of the New Document dialog boxes from Word 2003 and earlier. ■

To create a new document based on any of the items you see, you need to either double-click the item or click the desired item and then click Create. This starts a new document based on your choice.

FIGURE 31-1

File ➪ New takes you to the Grand Central Station for Word templates.



In some cases the chosen item will start a new document with some text already in place, ready for you to use or modify as needed. In other cases, all a template brings to the table is a set of styles, ready for you to apply. In still other cases, using a template to create a new document provides a special ribbon (such as when you're creating a new blog entry). In still other cases, a wizard is started, prompting you for step-by-step input.

In File ➪ New, "Blank document" is initially selected under Available Templates, which contains templates installed on your computer. When you first open the Backstage New view, you have Available Templates at the top, and Office.com Templates below that.

Blank Document

To create a blank document based on `Normal.dotm`, you could simply press Ctrl+N, bypassing Backstage New view. When you click the drop-down arrow at the right end of the QAT and click New (note the lack of an ellipsis following New), that New command also creates a new blank document based on `Normal.dotm`.

Note

Whether you really get a "blank document" depends on the contents of your own `Normal.dotm` file. You certainly know better than Word whether your own Normal template contains starting text, content controls, or other ready-to-roll text. ■

Under Available Templates, only two items lead directly to actions. All the others essentially drill down into other lists. The two direct items are:

- **Blank document:** Create a new document based on `Normal.dotm`, the default document template.
- **Blog post:** This creates a new document based on `Blog.dotx`, a special template that's designed for blog entries. Refer to Figure 30-8 for an example of the resources `Blog.dotx` provides.

Recent Templates

If you've previously visited Backstage New and used a specific template — from Available Templates or from Office.com Templates — "Recent templates" displays the ones you've recently used, listed from most to least recent.

Sample Templates

When you click "Sample templates," Word displays Microsoft-provided templates that are installed on your local hard drive. These were installed when you installed Office 2010. Since there is no separate listing for them in Office 2010 Setup, they *should* be listed, unless your network manager chose to omit them.

My Templates

This option displays the New dialog box shown in Figure 31-2. This provides access to templates created and customized by you. Click the desired template, and then click OK to create a new document based on it.

Tip

For better information in this dialog box, just above Preview, click the rightmost icon, Details. Then drag the Type header so you can't see it, to widen the Modified header. Now you can better see full template names, sizes, and date, letting you better assess whether what you see is what you want. ■

New from Existing

This option displays the New from Existing Document dialog box, shown in Figure 31-3, where you can specify an existing document to use as a starting point for creating a new document. Find and select the document you want to use and then click Create New. This is the equivalent of opening an existing document and immediately choosing File ➪ Save As and saving that document with a new name.

FIGURE 31-2

Templates and tabs listed in the New dialog box correspond to files and folders located in the Templates folder available from the File ➪ Open and File ➪ Save As dialog boxes.

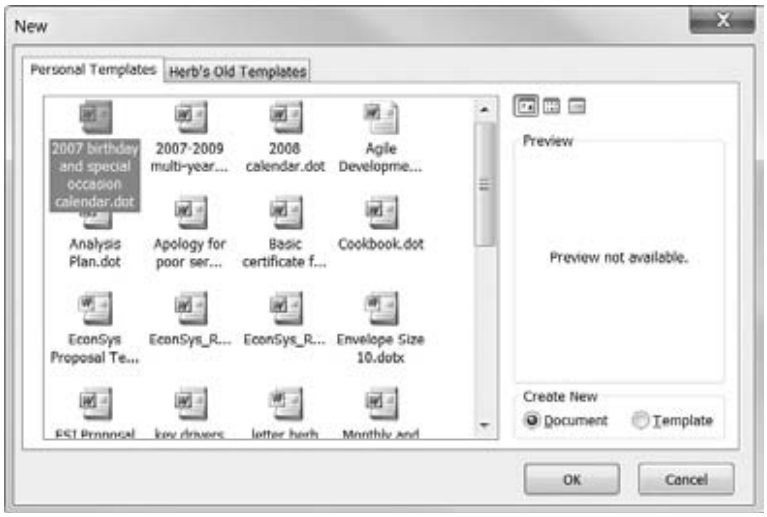
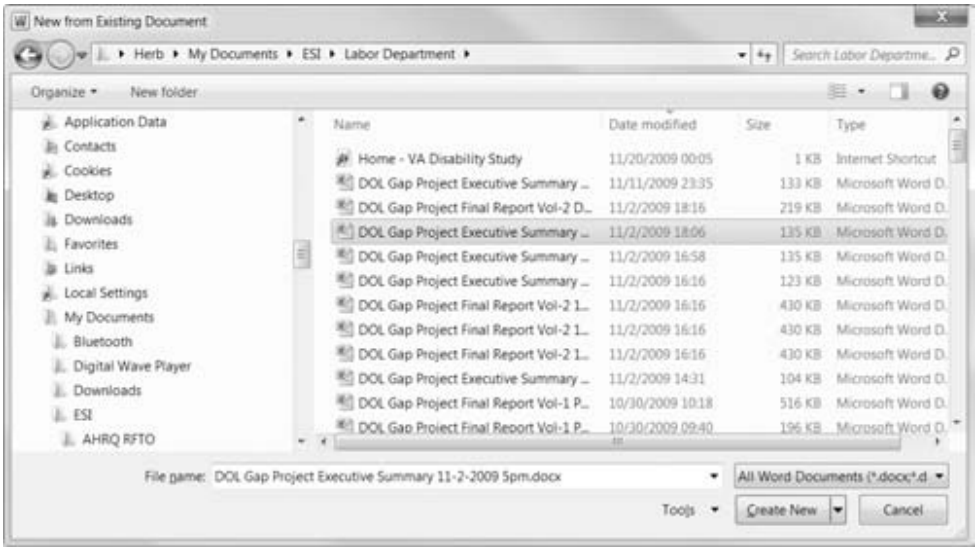


FIGURE 31-3

Use New from Existing Document to create a new document based on any existing document or template.



Office.com Templates

The Office.com Templates section shows templates available for download from Microsoft. All the items shown are folders, often leading to subfolders and even sub-subfolders. So you might have to *drill, baby, drill* (to borrow a recent phrase) to find what you want. Double-click a folder to drill. When you find what you want, either double-click it or select it and click Download.

This is where "Recent templates" will come in handy later on. Once, you've drilled, baby, the template you downloaded will now be listed in "Recent templates" (at least until it's no longer "recent").

Note

When you download a template from Microsoft Online, you *might* encounter the Microsoft Office Genuine Advantage dialog box, designed to combat piracy. Microsoft will validate your copy of Microsoft Office each time you download content from Microsoft Online. Click "Do not show this message again" to avoid such a prompt. Then click Continue. If you pass the secret handshake test, the template will then be downloaded. Or you might never encounter this indignity at all. Go figure . . . ■

To access additional Office.com templates, click any of the folders shown (for example, Agendas, "Award certificates," Brochures, and so on). Clicking some folders immediately displays available online templates, while clicking others, such as the Letters folder, displays a list of subcategories, as shown in Figure 31-4. As you navigate through the online content, back and forward arrows appear near the top of the window. Use those to navigate. To the right of the arrows, Word displays where you are in the folder structure. You can click any folder shown there to go up to that level. Clicking Home takes you back to Kansas.

Searching for Online Templates

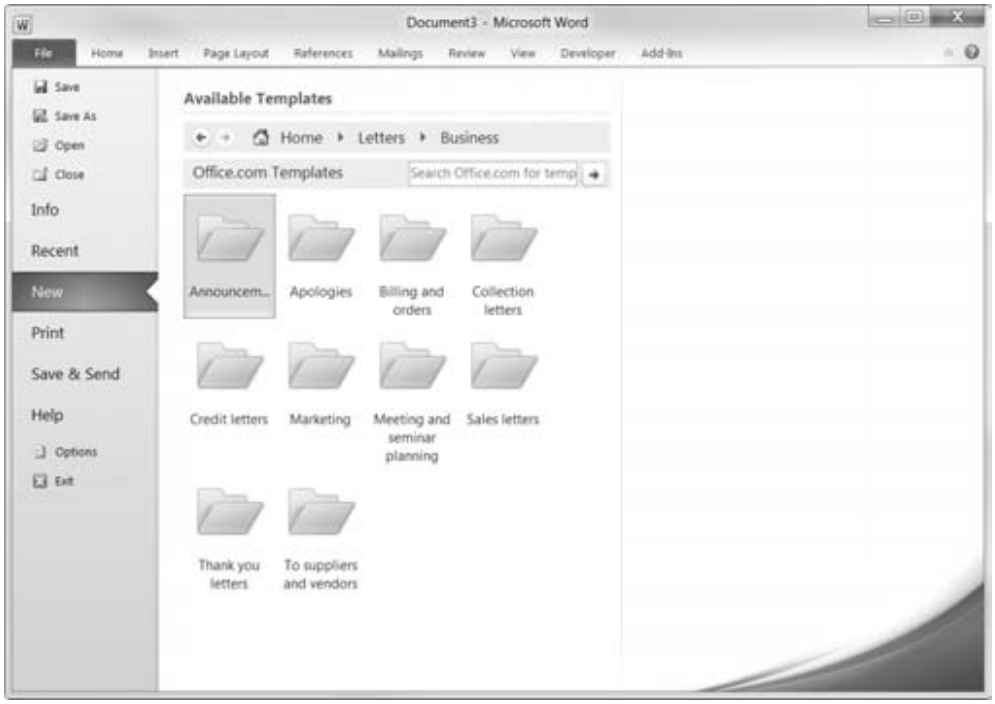
If you haven't yet noticed the Search Office.com box below the navigation line, notice it now. The Search box searches Office.com for templates that contain names or descriptions that match the search text. Note that when you search, whatever category you might have selected at the left is ignored. You can either navigate by category or you can search. You can't search within a category. However, if you specify the category in the search box along with other text, your search results will include items from that category, although they won't be limited to that category.

Note

The more obscure the template you're looking for, the longer the search can take. There are literally many thousands of templates available, so the likelihood of some match is pretty good. However, depending on your connection speed and the obscurity of your search, it can take 15 minutes or longer to find something. ■

FIGURE 31-4

Some Microsoft Office Online template categories have subcategories.

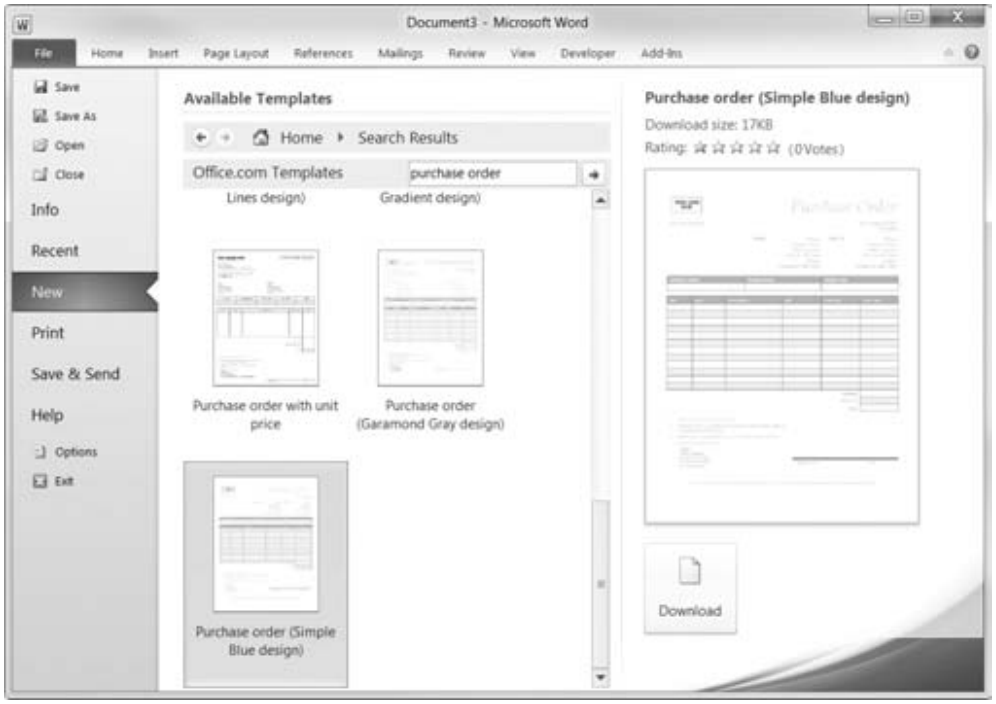


Word displays templates matching the search under Office.com Templates, offering a preview. If there are too many matches, you can add additional search terms. If you replace your first search terms, Word will not search within existing results — it will instead conduct a new search. If there are no matches, then try widening the search by being less specific.

When (and if) you find a template that looks promising, click to select it. As shown in Figure 31-5, Word displays a preview of the selected template, as well as the size and rating. As of this writing, however, rating always displays exactly "0 Votes." To use the selected template, double-click it or click Download. Word downloads the selected template.

FIGURE 31-5

Word provides a preview and the size of selected templates when you are searching online.



Creating Templates

You can create your own templates in a variety of ways, including some not mentioned here. You can't create a template, however, simply by renaming a `.docx` file as a `.dotx` file. Word 2010 is too smart for that old trick. In addition, you can't rename a `.dotx` file as a `.docx` file and convert it into a document. Trying either will net you a message box similar to the one shown in Figure 31-6.

FIGURE 31-6

The .docx and .dotx files are fundamentally different. If you rename a .docx file as .dotx, Word will no longer recognize it as a valid file.



Valid ways to create new Word template files include the following:

- **Save As:** With an existing document or template open, choose File ➪ Save As, and set Save as type to one of the Word Template options (Word Template, Word Macro-Enabled Template, or Word 97-2003 Template). The new template will be 100% identical to the current file, and will contain any text, formatting, macros (assuming the correct type is selected), and styles that the original contains — limited, of course, by compatibility issues if you're saving from a Word 2010 type to a Word 97-2003 type (for example, a Word 97-2003 template cannot retain Word 2010 Building Blocks Gallery items; they are converted to AutoText items).
- **New from other existing template:** Choose File ➪ New ➪ My Templates. Set Create New to Template, select the desired template file, and click OK (or simply double-click the template). The new file is a perfect clone of the original, once you save it under a new name.
- **New from installed template:** Choose File ➪ New ➪ Sample Templates. Click the desired template, click Template (above the Create button), and then click Create. The new file is a clone of the original.
- **Using any filesystem window:** For example, from Windows Explorer or Word's Open or Save As dialogs, use ordinary Windows techniques to copy any existing template file. The new file is a clone of the original.
- **Cloning everything except for text and nonstyle formatting:** Press Ctrl+N to create a new blank document, and then choose Developer ➪ Document Template ➪ Attach ➪ Select the target template ➪ Open. Enable the "Automatically update document styles" option and then click OK. Then choose File ➪ Save As, and set Save as type to one of the template formats and click Save. Top-level formatting, such as page and section formatting, is not copied to the new document, but any styles, macros, and Building Block items (limited by version compatibility considerations) will be available in the new template.
- **Cloning everything except for text:** Open an existing document or template, press Ctrl+A to select everything, and press Delete. If desired, double-click in the header and/or footer areas and delete everything there as well. Then proceed as shown under the Save As method.

For each of these methods, in order for the templates to be available from the New dialog box, you need to save them to your Trusted Templates folder. Templates saved elsewhere can still be used, but you need to navigate to them in order to use them.

The Organizer

The Organizer, once a center of great power and control in Word, has lost a good deal of its luster and grandeur. In Word 2003 and earlier, you could use the Organizer to copy Styles, AutoText, Toolbars, and Macro Project Items between templates and documents. You could also use it to delete and rename any of those items (except for built-in styles, of course).

In Word 2010, however, two tab divisions are no longer here: AutoText and Toolbars. Toolbars, of course, are completely moot because they no longer exist in Word 2010 (as of Word 2007,

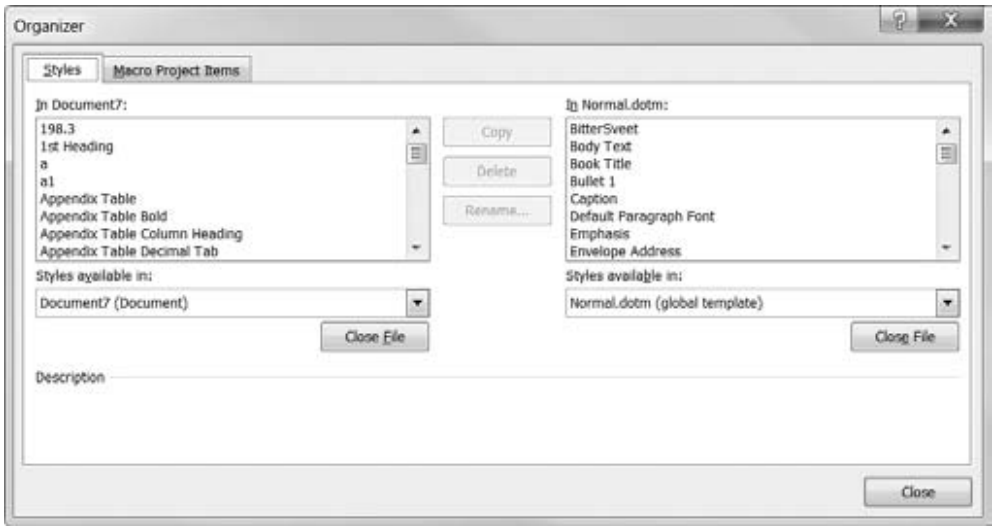
in fact) in the same way that they existed in Word 2003 and earlier (keeping in mind the Quick Access Toolbar, of course, which does not resemble earlier toolbars). To manipulate AutoText you now need to use the Building Blocks Organizer, as described in Chapter 13.

Using the Organizer

To use the Organizer, choose Developer ➪ Document Template ➪ Organizer, which displays the Organizer dialog box shown in Figure 31-7. Use the drop-down arrows next to the "Styles/Macros available in" lists to choose the source and target document(s) and/or template(s). If either the target or source isn't available, click either of the Close File buttons to close either currently open file. The button immediately changes to Open File. Use the Open dialog box to navigate to the desired file, and then click Open.

FIGURE 31-7

Use the Organizer to copy styles and macros between documents and templates, or to rename and delete specific styles and macros.



Copying Styles and Macros

To copy styles or macro project items, use standard Windows list-selection techniques to select the items you want to copy in the source (In) window — the moment you select an item, the opposite pane's preposition changes from In to To. Click Copy to copy the selected item(s) to the To file. You aren't limited to one direction — either pane can become the "To" pane depending on which pane contains the selection.

Deleting Styles and Macros

To delete items, select the items you want to delete and then click Delete. They can be deleted from only one file at a time. You cannot delete built-in styles such as Heading 1 and Normal.

Caution

If you delete a user-created style, all text formatted with that style will be reformatted as Normal. If you want to assign a new style to that text, do it *before* deleting the old style. Better still, if the new style doesn't yet exist, simply rename the unwanted style using the new name. As noted in the next section, however, you cannot rename built-in styles. ■

Renaming Styles and Macros

To rename an item, select it and click Rename. In the Rename dialog box, type a new name and click OK. Note that built-in styles cannot be renamed — all you can do is add alternative, or alias, names. For example, if you type **1h** into the Rename dialog box when trying to rename Heading 1, it will be renamed to Heading 1,1h. This feature is not without utility, mind you, since it then lets you press Ctrl+Shift+S, type **1h**, and press Enter to apply Heading 1 to the current paragraph. You can add multiple aliases to any style.

Removing Style Aliases

To remove a style name's alias, select the style and click Rename. In the Rename dialog box, delete the portion of the name that you want to remove. Continuing with the preceding example, if you no longer want to be able to refer to Heading 1 as 1h, delete ",1h" and leave the Heading 1 portion. If a style has multiple aliases, remove just the ones you no longer want, keeping in mind that the built-in name, if there is one, will survive regardless of what you try to do.

Modifying Templates

You can modify or customize any template on your computer. There are at least four ways to do this:

- **Direct:** Open the template as if it were an ordinary document and make your modifications directly. Save the edited file when you are done.
- **Indirect:** Modify styles as shown in Chapter 9, taking care to enable the "New documents based on this template" option. When and if prompted, say Yes to saving changes in the underlying template file.
- **Organizer:** Choose Developer ➪ Document Template ➪ Organizer. Use the Close File and Open File controls as needed to open the source and target templates. Then use controls in the Styles and Macro Project Items tabs to copy, delete, and rename styles and macros as needed. When you're done, click Close.
- **Building Blocks Organizer:** Use the Building Blocks Organizer to move Building Blocks Gallery items between templates, as shown in Chapter 13.

Themes

The Themes feature is *not* broken, despite what you might think the first time you try to use this live preview-enabled feature. Unless a document explicitly uses theme-based formatting, however, changing themes will appear to have no effect. Themes are housed at the western edge of the Page Layout ribbon, shown in Figure 31-8.

FIGURE 31-8

Theme settings are designed to color-coordinate your documents.



Note

Note also that the Themes feature set does not work in compatibility mode. There is no mechanism for storing Word 2010 theme information in the standard Word 97-2003 document format, even though Word 2003 has its own different brand of theme formatting. ■

What Are Themes?

Themes are coordinated sets of colors, fonts, table formats, and other graphic elements used to change the overall look of a document while leaving its content unchanged. Word comes with 40 built-in themes, some of which are shown in Figure 31-8.

The use of themes hinges on using certain Word 2010 formatting features in a particular way. Unless a given document has been designed to use theme elements, you might quickly conclude that themes are broken. They are not.

Another important thing to know about themes is that they are not part of style formatting. There is no way to associate or assign a theme with a particular style. Themes are applied to the entire document, wholly apart from styles.

Understanding Themes

The best way to understand themes and what they bring to the document design table is to use them on documents designed with themes specifically in mind. Click the Themes button in the Page Layout ribbon (refer to Figure 31-8), and note the names of the themes — Apex, Aspect, Civic, Concourse, Equity, Median, Oriel, and so on.

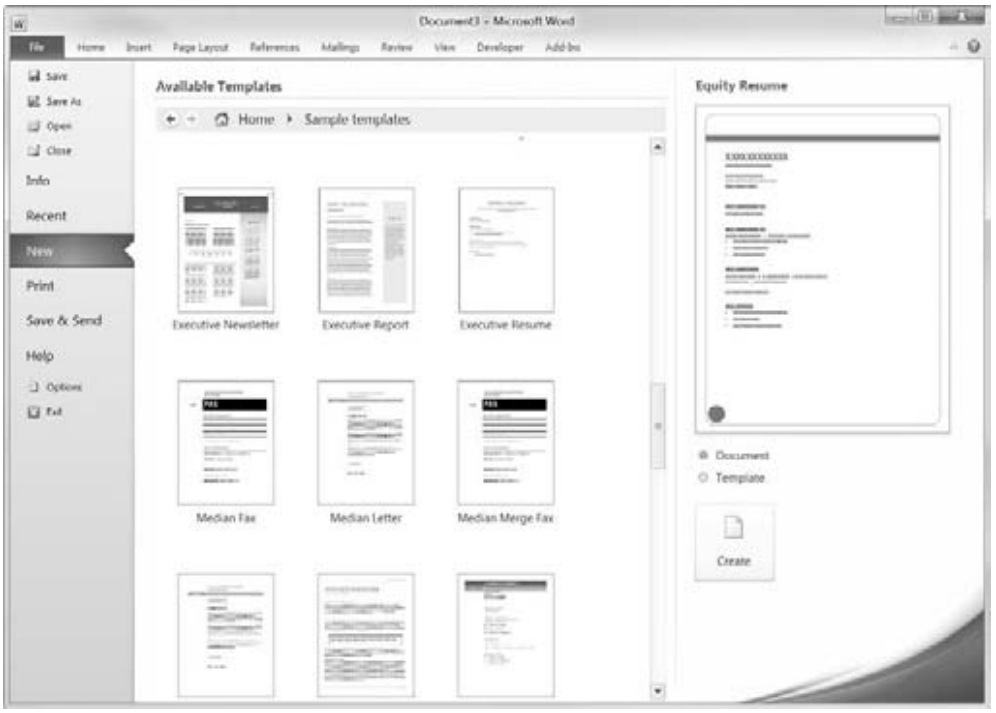
Note

For the following procedure to work, you must be connected to the Internet. ■

Press the escape key to dismiss the Themes list, choose File ➪ New ➪ Sample Templates, and scroll down to Equity Resume, as shown in Figure 31-9. Double-click it or click Create. You should now have that résumé onscreen in a new unsaved Document# window.

FIGURE 31-9

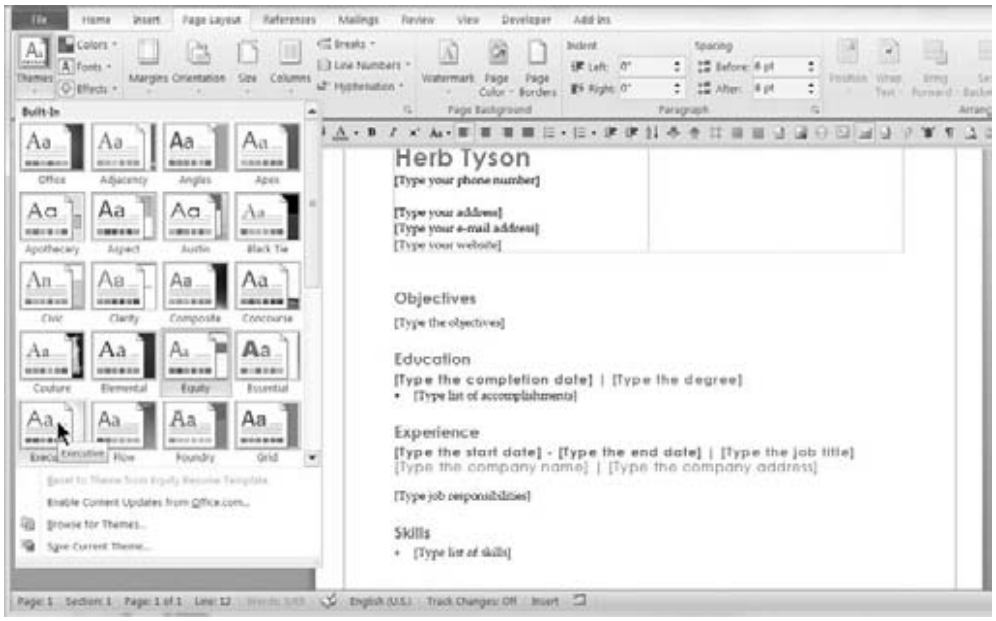
A number of templates that come with Word have been designed to work with theme elements.



In Print Layout view with the zoom set at about 70%, scroll the document so that you can see the whole page. Then, in the Page Layout ribbon, click Themes, and move the mouse over the different themes, as in Figure 31-10. Notice that the document's fonts and colors change as you hover over different themes. When you hover the mouse over the Equity theme, the résumé suddenly looks as it did when you first downloaded it.

FIGURE 31-10

If the document uses theme elements, you will see those elements in action as you hover the mouse over different themes.



The parts of the document that are affected are only those that were formatted with certain theme elements. Theme elements include particular document styles (such as Body and Heading styles), colors (such as Text/Background 1 through 3 and Accent 1 through 6), and shape styles.

Differences between Themes and Templates

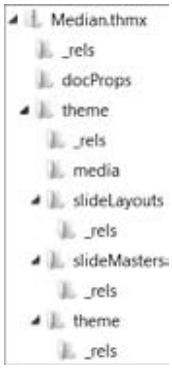
Word templates are stored in `.dotx` and `.dotm` files, and contain styles, macros, QAT settings, and keyboard customization settings. Templates are essentially documents, so they can contain text, graphics, and formatting as well.

Themes, on the other hand, transcend the boundaries of traditional Word structures. They instead owe their existence to `.thmx` files stored in the `C:\Program Files\Microsoft Office\Document Themes 14` folder. Like Word's `.docx` files, `.thmx` files

are actually compressed .zip files that contain a number of subfolders and files. The structure of the Median.thmx file is shown in Figure 31-11. Note that this theme file's name was changed to include a .zip extension so that its contents could be viewed by Windows Explorer. For Word to recognize the file as a theme file, the .zip part of the name would need to be deleted.

FIGURE 31-11

Word gets its theme information from .thmx files, which are compressed .zip files that contain the XML structure and supporting files.



Another piece to this puzzle are additional matching files (for example, Median.xml and Median.eftx) contained in the Theme Colors, Theme Effects, and Theme Fonts subfolders in the Document Themes 14 folder. In this case, files named Median.xml are stored in Theme Colors and Theme Fonts, while a file named Median.eftx is stored in Theme Effects. In case you didn't guess from the x ending of the latter file, it too is a compressed .zip file. Feel free to explore the structures at your leisure. The full scoop on them is beyond the scope of this book. Pointing you toward them and inviting you to explore, however, is not.

Themes work by adding additional information to the current document, with much the same kinds of results as style sets, as discussed in Chapter 9. While the method for themes is different, using XML structures, the result is that the colors, fonts, and effects are added to the current document's formatting.

Theme Elements or Components

As suggested by Figure 31-12, themes consist of three elements:

- Theme colors
- Theme fonts
- Theme effects

By modifying theme elements, you can create new themes that you can save. By applying themes to Word documents and templates, you can create not only themed documents, but new templates as well.

FIGURE 31-12

Themes are made up of colors, fonts, and effects.



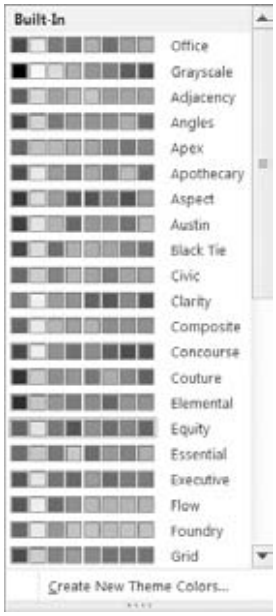
Theme Colors

While each of the named themes that come with Word has a pre-assigned set of theme colors, there's no reason you have to be wedded to that set of colors. After all, it's *your* wedding, so to speak. You get to pick your own color theme! If you want the Urban theme but prefer the Verve color set — go for it! You can even save that theme and name it Urban Verve, or Vervy Urban, or Chauncey, even. See the section "Saving Custom Themes."

To change color sets, in the Page Layout ribbon, click the drop-down arrow next to Colors to display the options shown in Figure 31-13. As you mouse over the different color sets, text with any of a dozen attributes assigned (more on this in a moment) changes to reflect the color set under the mouse pointer. Click when you see the colors you want.

FIGURE 31-13

Colors and themes can be applied independently.

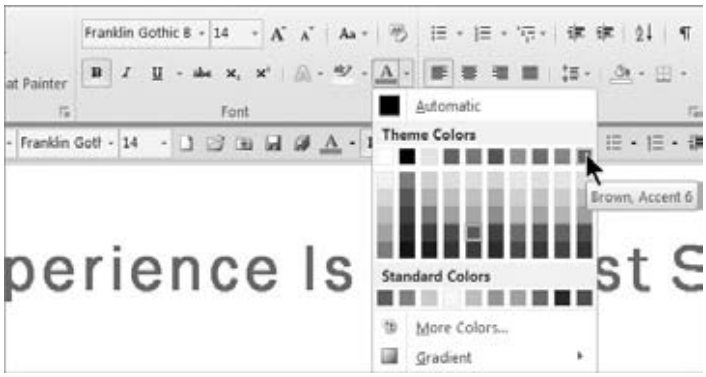


In order for these colors to have an effect on colors in your document, you must have used a themed template or a themed style set, or at the very least you must have directly applied theme colors. As noted earlier, if you use templates such as the Median, Oriel, Origin, Equity, and Urban template sets, then themed colors will be available for use. Similarly, if you use (in the Insert ribbon) Change Styles ➪ Style Set, and apply style sets such as Distinctive, Elegant, Fancy, and so on, your document will be using themed colors.

You can also use themed colors directly. Select text or a graphic element and apply color using the Font Color tool's Theme Colors (shown in Figure 31-14), as opposed to Standard Colors. When you use any of the named color slots (such as Accent 2) to format text, Word will change the color of that text when you apply a new color theme.

FIGURE 31-14

In order for theme changes to affect the current document, text or other elements must have been formatted using theme colors.



You can create your own theme colors. At the bottom of the colors list shown in Figure 31-13, click Create New Theme Colors. Use the controls provided to change any of the colors as desired. The Create New Theme Colors dialog box doesn't provide live preview. However, you can click Preview to apply the colors to the current document. In the Name box, provide a descriptive name, especially if you plan to create multiple sets of colors (Custom 1 isn't exactly informative), and then click Save. The file will be saved in `.xml` format in `C:\Users\`*`user`*`\AppData\Roaming\Microsoft\Templates\Document Themes\Theme Colors`.

Theme Fonts

Theme fonts are a bit simpler to understand because there are only two components: headings and body text. Notice in Figure 31-15 that the Apex theme fonts are selected. Shown here you see larger text in Lucida Sans and smaller text in Book Antiqua. For each theme, the larger font shown is the one that will be applied to Heading styles (Heading 1, Heading 2, etc.), and the smaller one is the one that will be applied to body text.

FIGURE 31-15

For each theme, the Theme Fonts drop-down gallery shows the fonts used for headings and body text.



You might not have noticed it, but Theme Fonts (associated with the default Office theme) manifest in other ways in your documents as well. Click the Font drop-down arrow in the Home ribbon. At the top of the list, you probably see something like what's shown in Figure 31-16. Note that it says Theme Fonts. Here, it shows that Franklin Gothic Book will be applied to all Headings (anything formatted using Heading 1 through 9), and Perpetua will be applied to all Body text.

You can create new theme font sets. Use the Theme Fonts drop-down list to select Create New Theme Fonts. In the Create New Theme Fonts dialog box, shown in Figure 31-17, choose the Heading and Body fonts, provide an informative name, and click Save. The theme font will be saved in `.xml` format in `C:\Users\`*`user`*`\AppData\Roaming\Microsoft\Templates\Document Themes\Theme Fonts`.

FIGURE 31-16

You've probably been using theme fonts all along without knowing it!



FIGURE 31-17

When you create new theme fonts, it's useful if the name you choose either describes the purpose for the fonts or includes the font names.

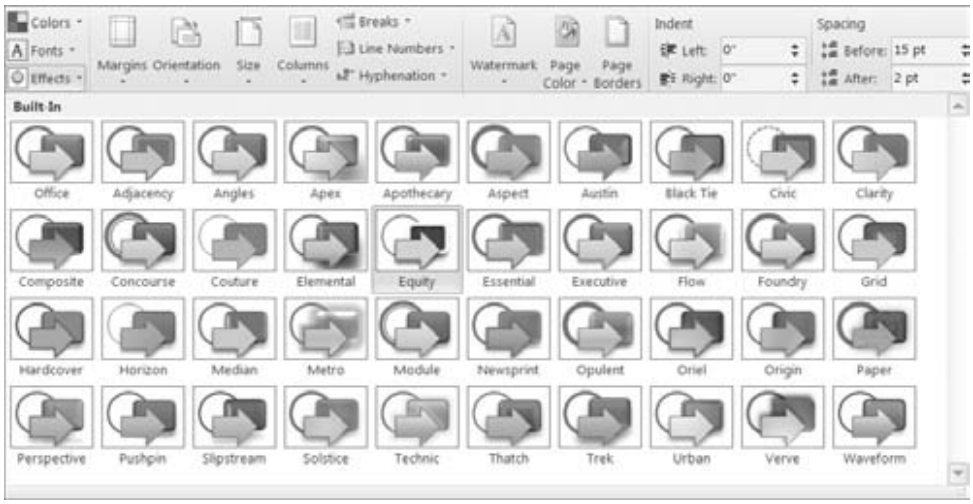


Theme Effects

Theme effects are a bit harder to grasp than other theme elements, mostly because they're used a good deal less often by the average user. In the Page Layout ribbon, click the Effects drop-down arrow to display the gallery of options shown in Figure 31-18. Here I've resized the gallery so you can see all 40 choices at once. If you study the different theme effects, you will see sometimes subtle and sometimes not-so-subtle differences among the elements shown. For example, the Office set looks soft-edged and perhaps a little blurred with shadows at the edges. Metro is lighter in color, but the rectangle looks shiny. (It's unlikely you can see this in the picture in the book, so look onscreen.)

FIGURE 31-18

Theme effects can be applied to SmartArt, WordArt, Charts, and Shapes.



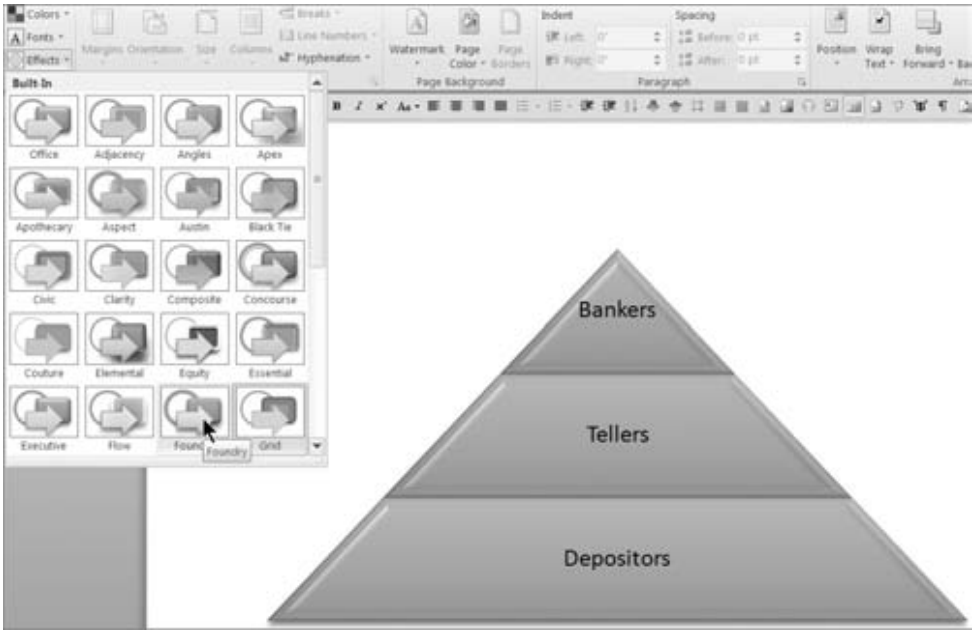
The easiest way to see theme effects in action is to deliberately contrive an example. In the Insert ribbon, click the SmartArt tool, and in the Pyramid group, double-click Basic Pyramid. In the SmartArt Tools Design ribbon, drop down the SmartArt Styles More button and apply the second style under 3-D. Fill in some text, if desired, as shown in Figure 31-19.

Now, in the Page Layout ribbon, drop down the Theme Effects list and hover the mouse over different theme effects, observing the pyramid as you do. A number of SmartArt objects use theme-connected effects (as well as theme colors and fonts).

You have seen how to save custom theme colors and theme fonts. The Word 2010 interface does not provide a built-in, direct way for you to save custom theme effects. You can indirectly save them, however, by saving the whole theme, as shown next.

FIGURE 31-19

Theme effects affect some SmartArt graphics, but not all of them.



Saving Custom Themes

Using the controls provided, it's possible to create sets of theme elements that you want to preserve for future use. As indicated, you can save custom colors and fonts. In addition, you can save entire themes.

Alternatively and additionally, you can include other elements, such as text, styles, prebuilt headers and footers, and other document elements, and save the entire setup as a template. When you do that, any custom themes employed automatically become part of the saved template. See the "Creating Templates" section earlier in this chapter for additional information on saving document templates.

To save a custom theme, in the Page Layout ribbon, choose Themes ➪ Save Current Theme. In the Save Current Theme dialog box, shown in Figure 31-20, type a descriptive name and click Save.

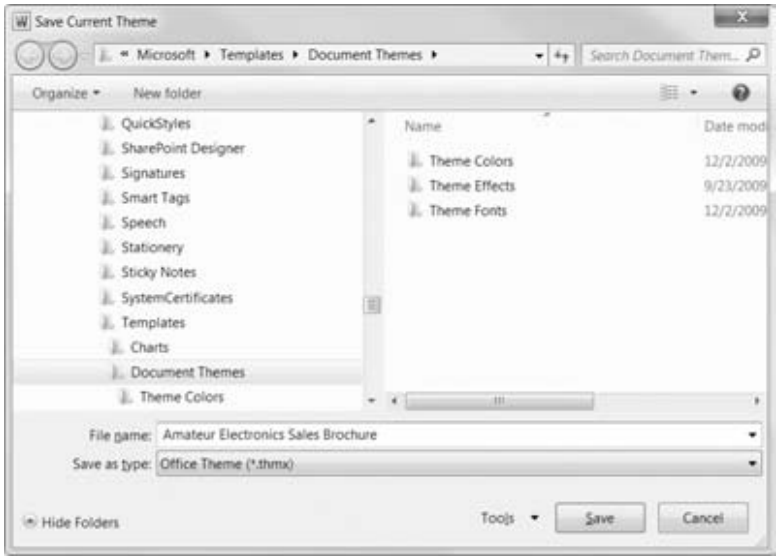
Setting the Default Theme

In Word 2003 it was easy to set the default theme. Choose Format ➪ Theme, click the desired theme, click Set Default, and then confirm that that's what you want to do. There is no corre-

sponding setting in Word 2010. Does this mean that you can't set the default theme? Not at all, but the method is a bit more circuitous. Or maybe it's more direct. In any event, it's not easier.

FIGURE 31-20

Overall themes, theme colors, theme fonts, and theme effects are saved in the same folder set by default.



To set the default theme, you need to open the template whose theme you want to change. Then apply the new theme and save and close the template. Sounds simple, right? Well, maybe it is.

Choose File ➪ Open, and in Libraries, double-click on [user]'s Templates to go to your templates folder. Find the template you want to change (`Normal.dotm` if you want to change the general default for new Word documents not based on other templates), and open it. In the Page Layout ribbon, choose Themes and apply the theme you want. Finally, save and close the template.

Caution

Editing templates, while seeming simple, is not without a few hazards. If you incidentally or accidentally insert text in an otherwise blank template, that text will be present each and every time you create a new document based on that template. Therefore, if a "blank" document suddenly isn't blank, check the template to see if you accidentally saved text in it. Another hazard is that in testing to ensure that something really works, users sometimes apply formatting, such as a header style, to the default paragraph mark. The result is similar to what happens with default text. The formatting of the initial paragraph mark becomes the starting formatting when you create a new document based on that template.

One way to avoid these risks is to do two simple things anytime you edit a template that is supposed to yield a blank starting document. First, press Ctrl+A to select everything, and press Delete. Second, press Ctrl+A again, and click the Clear Formatting tool in the Font section of the Home ribbon. That removes any stray formatting that might have inadvertently been applied. Once you are done, close the file, saving the changes. ■

Summary

In this chapter you've seen what templates are, how to use existing templates from a variety of sources, and how to create and modify templates. You've also learned about Word 2010's theme feature, how to apply themes and theme elements, and how to save custom themes. You should now be able to do the following:

- Understand the relationship between themes and templates
- Create a new document based on built-in templates, user-created templates, or templates from Office.com
- Create a new document template
- Copy styles and macros from one template to another
- Rename styles and add or remove style aliases
- Change the default theme of a template
- Change document themes at will, and understand why a theme might not have any effect on a document
- Save custom themes

Part VI

With All Due Reference

You've probably heard that it's not polite to point. Well, sometimes, it's not only polite, but necessary as well. What's the good of having all of this well-designed content if you can't point to it? Part VI shows you how to use parts of documents in other parts of documents.

Chapter 32 begins with the foundation of many of Word's referencing features: bookmarks. Next, Chapter 33 shows you the quickest and easiest way to create a table of contents; it also shows you the more tedious methods if "easy" isn't your thing. Chapter 34 ventures into the dark and dangerous world of Master Documents, Word's equivalent of snake handling. For the academics among you, Chapters 35 and 36, respectively, tell you everything you need to know about footnotes and endnotes as well as how and when to use Word's brand-new citations and bibliography tools. Chapter 37 shows you how to label everything with captions, some of them automatically. Bringing up the rear, Chapters 38, 39, and 40 cover indexing, tables of authorities, and hyperlinks (and cross-references), respectively.

IN THIS PART

Chapter 32
Bookmarks

Chapter 33
Tables of Contents

Chapter 34
Master Documents

Chapter 35
Footnotes and Endnotes

Chapter 36
Citations and Bibliography

Chapter 37
Captions and Tables of Captioned Items

Chapter 38
Indexing

Chapter 39
Tables of Authorities

Chapter 40
Hyperlinks and Cross-References

CHAPTER 32

Bookmarks

This chapter and the next few chapters that follow look at ways in which you can refer to, use, and reuse parts of one document in other parts of the same document, as well as in other documents. The foundation for this repurposing of parts of a document elsewhere in Word is the bookmark.

A *bookmark* is a way of naming a point or a selection in a Word document so that it can be easily located or referred to in some way. Bookmarks can be used for something as simple as a place marker. They are essential when you want to refer to parts of a document elsewhere — for example, when using table results outside a table, or referring to a figure number in the text. They can also serve as points of reference for macros and other features. Bookmarks also make great go-to locations when you want to create a dynamic document with hyperlinks.

IN THIS CHAPTER

Working with bookmarks

User-created bookmarks

Word-created bookmarks

Unhiding hidden bookmarks

Fixing broken bookmarks

Working with Bookmarks

Bookmarks come in several varieties. There are the kind that you might insert manually to create reference points or to be able to refer to or replicate text elsewhere in a document. There is also the kind that Word inserts automatically when you use certain features, such as inserting cross-references or when pasting OLE objects. Some of these automatic bookmarks can be made visible, and some are always hidden.

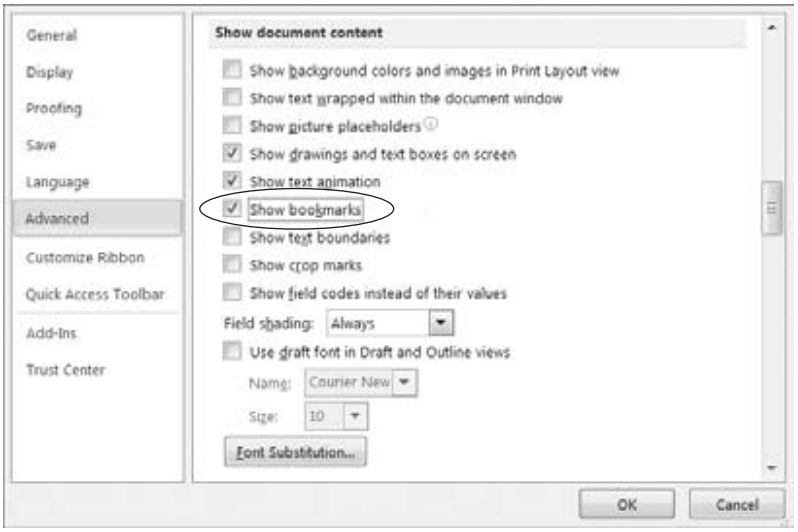
Displaying Bookmarks

One way to make sure that you don't have a bookmark mishap — accidentally deleting one that is crucial to some other feature working properly — is to know where they are, to the extent that you can. By default, Word does

not display bookmarks. To display nonhidden bookmarks, choose Office ➪ Word Options ➪ Advanced, and in the Show document content section, click to place a check next to Show bookmarks, as shown in Figure 32-1.

FIGURE 32-1

In File ➪ Options ➪ Advanced ➪ Show document content, place a check next to Show bookmarks to display bookmarks in your document.



When Show bookmarks is checked, bookmarks display as shown in Figure 32-2. A bookmarked area displays in [brackets]. A bookmarked point displays as an I beam. (The left and right bracket characters merge together so that the vertical components coincide, with the resulting representation looking like a large I.)

FIGURE 32-2

Bookmarks display as gray markers, but they do not print.



Documents sometimes contain hidden bookmarks as well, which are created by Word (see "Word-Created Bookmarks" later in this chapter) when you use certain features and commands.

Hidden bookmarks don't display in the document, but you can specify that they should show up in the Bookmark dialog box, as you'll see shortly.

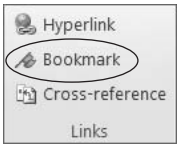
Information, as they say, is power. It cannot be overemphasized how important it is for you to *know* what's in your document. If your document contains bookmarks — whether you put them there or not — it's helpful and useful to know that they're there, if for no other reason than to keep from deleting them or changing them when other features depend on their being there and not changing. In this spirit, you are urged to run, don't walk, to your Advanced Word options, and enable the display of bookmarks. (To see how you can, after all, display the location of hidden bookmarks, see "Word-Created Bookmarks" later in this chapter.)

User-Created Bookmarks

As suggested earlier, you can bookmark a point or a selection. To bookmark a point, such as the beginning of a particular heading, move the insertion point to where you want the bookmark, and in the Links section of the Insert ribbon, click the Bookmark tool, shown in Figure 32-3. Alternatively, press Ctrl+Shift+F5. If you use bookmarks a lot, this is a keystroke worth remembering, or reassigning.

FIGURE 32-3

Choose Insert ➪ Bookmark or press Ctrl+Shift+F5 to insert a bookmark.



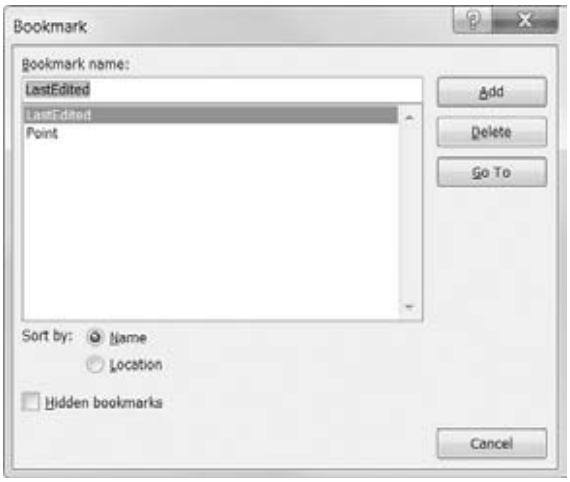
Tip

Unless you're a pro basketball player with enormous hands, you might not find Ctrl+Shift+F5 the most ergonomic of keystrokes. Many users prefer combinations they can press easily with one hand, and Ctrl+Shift+F5 definitely doesn't qualify for many of us. By a strange coincidence, Ctrl+Shift+B, a bit easier to manage, is redundantly assigned to Bold, and therefore is ripe for reassignment. Plus, it's mnemonically a bit easier to associate with bookmark than Ctrl+Shift+F5. To quickly reassign Ctrl+Shift+B to trigger the Bookmark dialog box, hold down Ctrl+Shift and press the plus sign on the number pad. This turns the mouse pointer into a cloverleaf pattern. Now press Ctrl+Shift+F5. This displays the Customize Keyboard dialog box, with the EditBookmark command highlighted. In the Press New Shortcut Key box, press Ctrl+Shift+B. Choose Assign ➪ Close, and you're done. ■

No matter how you stir the Bookmark dialog box into action, it appears as shown in Figure 32-4. Any existing bookmarks are already displayed. Type a name for the new bookmark and click Add. Unless you're creating a temporary placeholder and there's no chance of confusion, it's worth giving some thought to the names you choose so you can remember them. It's true that the Bookmark dialog box shows you the existing bookmarks, but if you have a lot of them, you might need to visit the various locations to be sure what's what.

FIGURE 32-4

Use the Bookmark dialog box to Add, Delete, and Go To bookmarks.



In addition to clicking Add, you can also press Enter to create a bookmark, provided that Add is the default button. If you type the same name as a bookmark that already exists, Word defaults to the Go To action. Not only didn't you insert the bookmark you wanted, but now you have to retrace your steps to find the location you intended to mark.

Tip

When an inadvertent Go To sends you on a wild goose chase, press Shift+F5 to go back to where you just were. ■

Why Bookmarks Are Used

Bookmarks enable you to refer to or replicate aspects of bookmarked materials elsewhere in a document. You learn more about this in subsequent chapters in this section. For now, however, here is an example.

In this book, each figure has a figure number, such as Figure 32-4. As this book is being written, these figure numbers are created by using a combination of a reference to the bookmarked chapter number and a SEQ FIGURE field. In the finished book, you see Figure 32-4. In the draft chapter with field codes displayed, you would instead see Figure { chapter } - { SEQ figure }. That way, the identical code can be used for every single figure number in the book. The chapter reference ensures that the 32 is correct for this chapter, and the sequence field automatically increments the figure number each time a new SEQ figure field is inserted. If a figure is inserted or deleted between other figures, all figure numbers after the last one affected can be automatically updated so it doesn't have to be done by hand. So far, so good.

There are one or more references to Figure 32-4 in the text. You could just type **Figure 32-4** each time you refer to the figure, but what if that figure number changes? You would then need to change all of the references, too. Instead of simply typing the figure number, you bookmark each figure number that is inserted, and then refer to that bookmark in the text instead of typing the number.

Here, for example, one might bookmark Figure 32-4's number, naming it BookmarkDialog. Then, instead of typing **as shown in Figure 32-4,** you type **as shown in { BookmarkDialog }.** Now, if the figure number changes, you can update any references to it by updating the field codes that refer to that bookmark.

Another thing to note, as indicated in Chapter 21, is that bookmarks can be used in field braces all by themselves, or with the REF field code. To insert the BookmarkDialog field, you could press Ctrl+F9 to insert {}, and then type *either* **BookmarkDialog** or **REF BookmarkDialog** between them and press F9. There are other methods as well (type the field code, select it, and press Ctrl+F9), but the point here is that you can refer to bookmarks with or without the REF.

What's in a Name?

Bookmark names can be any combination of letters (including accented letters), numbers, and the underscore (_) character. A clue that you've included an illegal character is seeing the Add button grayed out. Bookmark names are not case-specific. Many users mix uppercase and lowercase to make bookmarks easier to read, and because they don't like typing or looking at the _ character.

Overlap and Redundancy

Bookmarks can overlap each other as well as be contained within other bookmarks. For example, suppose the word *overlap* were bookmarked as example1 in the preceding sentence. You could also bookmark *overlap each other* as example2. In addition, you could bookmark *each other as well* as example3. The example1 bookmark is fully contained within the example2 bookmark, and the example1 and example3 bookmarks overlap. This example demonstrates what can be done, but doesn't fully demonstrate the utility. Being able to overlap and contain bookmarks within other bookmarks gives you the flexibility to create references within other references, as well as to refer to different material in a variety of different ways.

For example, suppose you have a passage that includes three tables and you want to include that passage in a report you are writing. You can bookmark the target passage and insert a REF field to it in the report. Suppose you want to refer to just one of those same tables in a letter you are writing. You can independently bookmark that single table, and include a reference to it in your letter.

Though you could simply copy the text, this has two disadvantages. First, if the source material is updated, the report and the letter would not reflect the updates. Second, and more important, if you simply copy the material, it wouldn't provide an example of why overlapping bookmarks can be useful, now would it?

You can also give the identical material multiple bookmark names. You'll see a practical strategic example of why you might want to do this in "Word-Created Bookmarks," later in this chapter.

How Many Is Too Many?

You can have any number of bookmarks in a document. Each one you insert is unique. If you add a bookmark named ThisPlace and create another one by the same name elsewhere in the same document, the other one is deleted. You do not need to explicitly delete a bookmark to use the same name elsewhere. You can, of course, reuse the same bookmark names in different documents. When referring to a place in a document, the document name (including its location in computer space) is included in the full reference to the bookmark.

Note

Earlier, it was indicated that the figure numbering strategy for this book uses Figure {chapter}-{SEQ figure}, where the chapter number was bookmarked as *chapter*. Do you see a potential problem with that strategy? As long as each chapter is in a separate file, this strategy works fine, but suppose you wanted to put all of the chapters together in the same file? You can't have multiple bookmarks called *chapter*. To accomplish numbering in that larger file, a different strategy would be needed. As it turns out, each of the chapter numbers for this book is formatted all by itself using the CN style. Therefore, in a multichapter version of this book maintained as a Word file, one could use {STYLEREF CN} for the chapter number. ■

Copying and Pasting Bookmarks

If you paste or insert text from a Word document, any bookmarks included in it come along for the ride, with two exceptions. First, if you paste as unformatted text, any bookmarks the text contains don't make the trip. Second, if you are pasting from a different document and the current document has bookmarks by the same name, the current ones are preserved, and the pasted bookmarks are lost at sea.

Caution

When pasting text containing bookmarks into text containing bookmarks by the same name, Word does not warn you or advise you. You're completely on your own. ■

Table 32-1 summarizes what happens when you add text to and delete text from items containing or marked with bookmarks, by typing, copying, cutting, deleting, or pasting. This summary assumes that you are not pasting as unformatted text.

Note

There is no way to add text or other material before a bookmark that's at the beginning of the document. To effectively place new unbookmarked material before the bookmark, you need to redefine the bookmark. ■

TABLE 32-1

Working with Bookmarks

Action	Result
Type, paste, or otherwise insert text or graphics anywhere within a bookmarked area.	The added material is included in the bookmark, and all references to that bookmark will reflect the addition when they are updated.
Delete or copy material containing part of a bookmark (beginning or end, but not both).	Partial bookmarks are not copied. If deleting/cutting material that includes part of a bookmark, the original bookmarked area is shrunk to reflect the removal of material.
Copy material containing entire bookmarks to another part of the same document.	The bookmarks are not copied because there is no mechanism for giving them new names.
Copy material containing entire bookmarks to another document.	The bookmarks are copied unless the document contains bookmarks with the same names.
Move material that contains entire bookmarks.	The bookmarks are moved to the destination.(by cutting/pasting or using the F2 method).
Delete all material between the beginning and ending bookmark brackets.	The bookmark is deleted.
Type or insert material immediately before an opening bookmark bracket or immediately after a closing bookmark bracket.	The material is not included in the bookmark area.

Bookmark Navigation

There are several ways to use bookmarks for navigation. You've already seen that the Bookmark dialog box has its own Go To button. Another vehicle is the Go To tab in the Find and Replace dialog box. Press Ctrl+G to call up the Go To tab in the Find and Replace dialog. Alternatively, you can double-click the Page, Section, or Line number segment in the status bar at the bottom of the Word window.

You can also use the Browse Object buttons to go to the next and previous bookmarks in a document. Once you've exercised the Go To tab in the Find and Replace dialog box, the Previous and Next buttons at the bottom of the vertical scroll bar turn blue and will take you to the previous or next bookmark. This enables you to easily march from bookmark to bookmark.

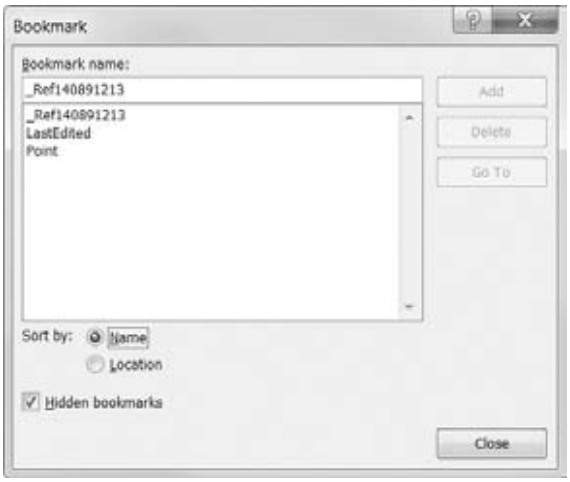
Word-Created Bookmarks

As indicated earlier, Word sometimes inserts bookmarks automatically. Some of these are hidden, and some are not. When using the cross-reference field, for example, Word automatically inserts

a hidden bookmark at the site of the source item so it can use that item for creating a reference. As shown in Figure 32-5, some Word-created bookmarks have an underscore at the beginning of the name. You cannot display a hidden bookmark in the document. Often, the only hint of its presence is when you click the Hidden bookmarks checkbox in the Bookmark dialog box. That will cause the _Ref140891213 bookmark to turn on and off in the dialog box.

FIGURE 32-5

The _Ref140891213 bookmark was automatically inserted by Word's cross-reference feature.



This document contains another Word-created bookmark, as well — OLE_LINK1. OLE (object linking and embedding) links are created when you copy and paste text or graphics as links between two different programs. If the source material is contained in a Word document, the OLE bookmark is not hidden. In Figure 32-5, if the check next to Hidden bookmarks is removed, the _Ref bookmark will disappear from the list, but the OLE link will remain. In the document, if bookmarks are displayed as shown in Figure 32-2, the OLE bookmarked material will display brackets around it, whereas the _Ref bookmarked text will not be displayed at all. In fact, the only way to know exactly what is referred to by the _Ref bookmark is to actually go to it.

Tip

Make it visible! Recall that earlier in this chapter you read that you can assign different bookmarks to identical passages. When and if you discover hidden bookmarks hiding in your document, make them visible by inserting redundant bookmarks. For example, in the Bookmark dialog box, select _Ref140891213 and click Go To. That selects the bookmarked passage. Go back to the Bookmark dialog box and give that currently hidden bookmarked passage another bookmark, maybe calling it visible_Ref140891213 or something similarly creative. To make this easy, click _Ref140891213 in the dialog box. That moves the bookmark to the Bookmark Name field. Press the Home key to go to the beginning of the textbox, and type visible in front

of the existing name. Then click Add. Presto. The hidden bookmark is still hidden, but you now know where it is in the text because *your* bookmark is visible. ■

Broken Bookmarks

When you or Word use bookmarks in your documents, you are at constant risk of bookmark errors. You need to be vigilant about two types of bookmark errors.

Error! Bookmark Not Defined.

The first and most common error is the dreaded "Error! Bookmark not defined." or "Error! Reference source not found." Anytime a bookmark is deleted, any reference to that bookmark will, when updated (by pressing F9 with that field selected), yield one of those pleasant little messages. When that happens, you have several options. You can repair or reinstate the missing bookmark. If that's not possible, you can reinstate the earlier displayed result and either lock the field against updating or convert it into hard text.

Regardless of which choice you make, immediately press Ctrl+Z. This undoes the update and restores the original text. Right-click the errant field, and choose Edit Field. Examine the field in the Field dialog box to see if you can determine where the problem lies. If you realize what happened, often you can go to the relevant document and passage, and repair the damage by reinstating the bookmark.

If the underlying document is gone, you can lock the field against further updates, and hope that the underlying document returns. To do this, with the field selected, press Ctrl+F11 (Lock Fields). You can later unlock the field by selecting it and pressing Ctrl+Shift+F11 (Unlock Fields).

If the underlying document or passage is gone with no hope of return, you can convert the current field result into hard text. With the field selected, press Ctrl+Shift+F9 (Unlink Fields).

Unwanted or Unexpected Results

The second type of error occurs less often but is also harder to spot. This kind of error occurs when the bookmark still exists but the text and other material it contains has changed. This can happen for a variety of reasons, the most common being bad memory. Suppose, for example, that years ago you bookmarked different paragraphs in a report or contract so you could use them as boilerplate text in other documents.

Now, you rediscover the source document, which had bookmarks turned off (so you don't even know they're there), and decide that the document will work quite nicely for something else, with just a few edits. You make your additions and deletions, expanding the text contained in some bookmarks, reducing the text in others, and perhaps even deleting a few along the way. After all, without bookmarks displaying, they might as well not even be there.

Later, you notice that some of the dependent documents have changed unexpectedly. After pressing F9, that pro hockey contract for Tommy Toothless McSlapshot suddenly has a maternity clause in it! Oops!

When this kind of error happens, the source material usually is too far gone to fix. Again, Ctrl+Z is your friend. Press Ctrl+Z to undo the F9 update, select the reference field, and press Ctrl+Shift+F9 to convert the passage into actual text. Let's just hope you noticed the error before sending the revised contract to Tommy. He has a temper and a hockey stick — not a good combination off the ice.

Summary

In this chapter, you've seen bookmarks in all their radiant splendor. You should have an idea of how to insert them and where they came from when you didn't insert them, and know a few of the reasons why they're useful and occasionally essential. You should now be able to do the following:

- Turn on the display of bookmarks so you know where they are
- Insert, delete, and redefine bookmarks
- Use bookmarks to replicate text elsewhere in a document
- Use damage control to deal with the most common broken bookmarks
- Use bookmarks to navigate through a document
- Assign redundant bookmarks to hidden bookmarks so that you know where they're lurking

CHAPTER 33

Tables of Contents

This chapter looks at what has become the master control for online documents, and the chief selling point for many books — the table of contents. For online documents, a table of contents provides hyperlinks into the rest of the document. See an interesting heading? Click it to see if it measures up. For published books, smart readers thumb through the table of contents to see what the book covers. Smarter readers, however, check the index, to see if crucial but arcane tidbits are covered. We look at indexes in Chapter 38. In addition to being the inside cover by which many a book is judged, tables of contents are *de rigueur* for many formal reports, as well as a sign of professionalism.

IN THIS CHAPTER

- Automatic tables of contents
- Tables of contents using styles and outline levels
- Manual tables of contents
- TOC styles
- Understanding the TOC field code

Automatic Tables of Contents

A table of contents is a heading-oriented list of what's in a document, and on what page each heading (or other table of contents entry) occurs. If you use Word's built-in heading styles religiously (after all, this *is* a Bible), you might never have to worry about some of the finer points of Word's Table of Contents commands. If, on the other hand, you need additional flexibility, you can use other styles, as well as direct entries, to create a table of contents.

Heading Styles

By far, the easiest way to create a table of contents is to use Word's built-in Heading 1 through 9 styles to organize your documents. As discussed in Chapter 4 (in addition to being repeatedly mentioned in the *Word 2010 Bible* every time the opportunity presents itself), using Heading styles is one of the most useful things you can do when writing long documents in Word. Not

only does it give you instant access to Word's powerful outlining and organization tools, it gives you the inside track on creating tables of contents as well.

To create a table of contents using heading styles, position the insertion point where you want the table of contents to appear. In the Table of Contents section of the References ribbon, choose Table of Contents. As shown in Figure 33-1, Word offers three built-in options:

- **Automatic Table 1:** Inserts a title (Contents) followed by a table of contents field
- **Automatic Table 2:** Inserts a title (Table of Contents), a table of contents field, and a page break
- **Manual Table:** Inserts a title (Table of Contents) and a dummy table of contents, ready for you to edit and replace with your own text and page numbers

FIGURE 33-1

The Table of Contents drop-down menu offers three built-in options, or choose Insert Table of Contents to choose your options and formatting.

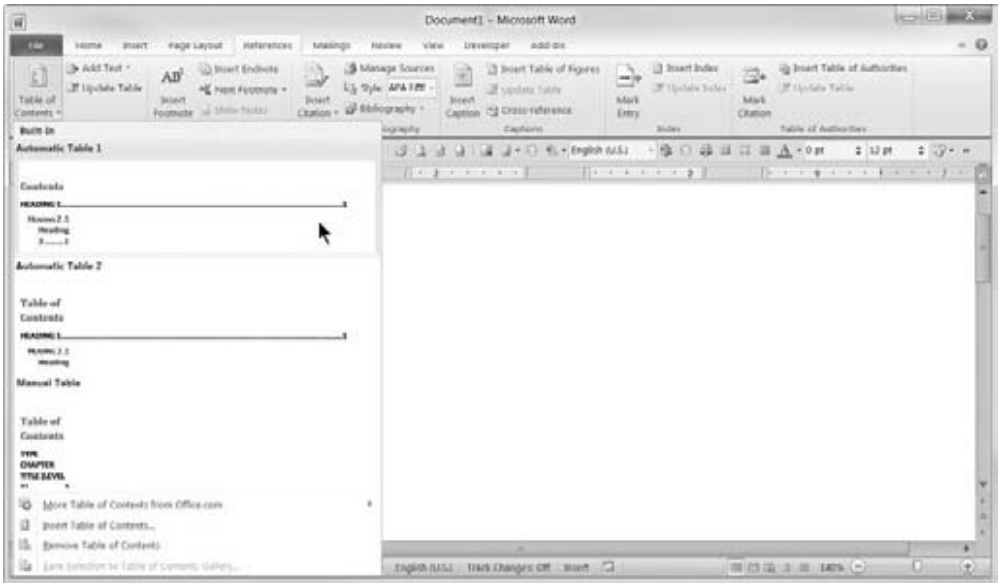
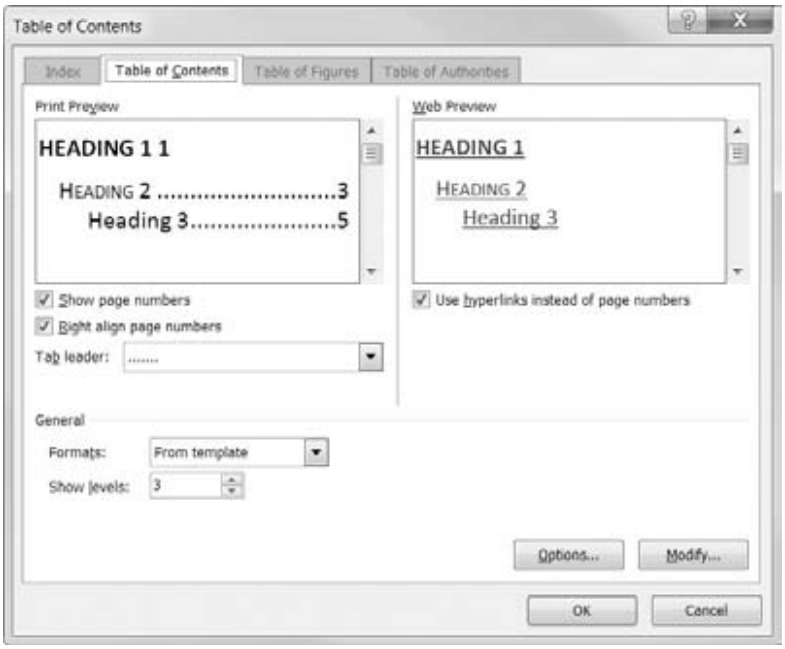


Table of Contents Defaults and Options

If one of the built-in tables of contents offers everything you need, click it to insert the table of contents at the insertion point. If not, click Insert Table of Contents, which displays the Table of Contents dialog box, shown in Figure 33-2. Both Print and Web preview are shown, sort of. It doesn't really show the actual table of contents material. Instead, it shows what styles will be used based on the settings shown in the dialog box.

FIGURE 33-2

Word's table of contents feature defaults to showing three heading levels and using hyperlinks for easy onscreen navigation.



Note

Hyperlinks — they're not just for web pages. The "Use hyperlinks instead of page numbers" setting has two effects. First, when the table of contents is displayed in Web Layout view, you will see hyperlinks (displayed using the hyperlink setting for the current theme) instead of page numbers, as advertised. Second, an unadvertised special, even when *not* in Web Layout view, the table of contents items are hyperlinks to the corresponding headings. Press Ctrl and click the heading to go to that heading in the document. ■

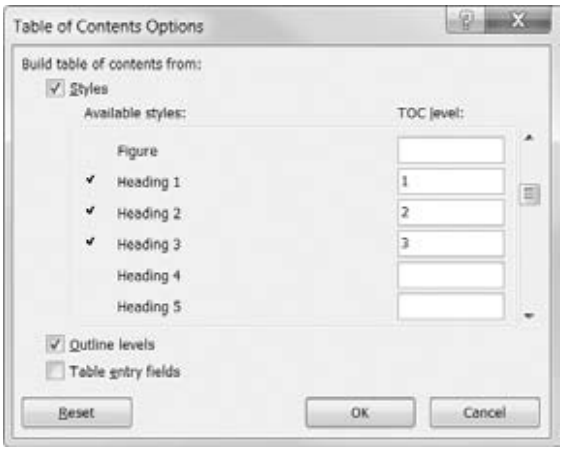
Word's table of contents defaults include the following:

- Show page numbers
- Right align page numbers
- Separate table of contents heading text from numbers using . . . leaders
- Use TOC style formatting from the current template
- Show levels 3 (uses Heading 1 through Heading 3, plus anything else assigned to those levels)
- Use hyperlinks instead of page numbers in Web Layout view (see the preceding Note)
- Build table of contents from styles and outline levels (see Figure 33-3)

- Don't use Table entry fields (see Figure 33-3)
- Reset all of the Table of Contents settings to the default (see the Reset button in Figure 33-3)

FIGURE 33-3

You can use the built-in outline level assignments or assign levels to other styles.



By default, with both Styles and Outline Levels checked, the TOC level list has a number from 1 through 3 (see the Show levels setting in Figure 33-2). Headings 1–3 are assigned TOC levels 1–3, respectively. You can annotate the TOC level list either to change the default assignments or to assign levels to additional styles. Suppose, for example, that you have styles named Title and Caption that you also want listed in the table of contents, under levels 1 and 4, respectively. Place a 1 next to the Title style and a 4 next to the Caption style. When you do that, the Show levels setting shown in Figure 33-2 is automatically reset to 4. If you want Captions showing at level 4 but don't want Heading 4 styles to be used, then remove the 4 next to Heading 4 in the TOC level list.

Setting levels using the controls shown in Figure 33-3 does not affect the formatting of the paragraphs. It affects only how the TOC field treats the corresponding styles in composing the table of contents.

If you don't want to use styles (Heading 1–9 or otherwise) for the table of contents, remove the check next to Styles in the Table of Contents Options dialog box, shown in Figure 33-3. If you do want to use styles, but not Headings 1–9, remove the 1, 2, 3, and so on from the TOC level list, and place 1, 2, 3, and so on next to the styles you want to use for the corresponding levels in the table of contents.

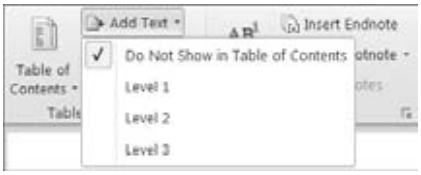
If your document doesn't use heading styles or other identifiable styles you want to use for establishing TOC heading levels, you're still not out of luck. You're merely in for a bit more work. See "Manually Creating a Table of Contents," later in this chapter.

Caveat Add Text Tool

In the References ribbon, notice the Add Text item, shown in Figure 33-4. In theory, this is supposed to be a ribbon alternative for assigning Outline levels, as shown in Figure 33-3. At best, it's an imperfect alternative. At worst, it's an invitation for confusion and minor formatting disasters. To confuse matters more, the behavior has changed since Word 2007.

FIGURE 33-4

Add Text does not create TC fields for manual table of contents entries.



Caution

Do not mistake the Add Text tool for a method to create manual table of contents entries. The Add Text tool does not create TC fields. See "Manually Creating a Table of Contents" later in this chapter for information on how to do that. ■

The Add Text tool's behavior depends on whether the selected paragraph(s) are formatted with a Heading 1 through 9 style, as well as whether the TOC level has already been manipulated directly (for example, using the Add Text tool from Word 2007). As noted in the following Caution, any levels assigned using this feature can easily be wiped out by applying a different style or simply by closing and reopening the document, under some circumstances. Use this feature at your own risk!

Caution

If the current template has the "Automatically update document styles" option enabled, any levels applied to non-Heading styled paragraphs will be undone the next time the document is opened. See the Caution under "TOC Formats" later in this chapter for additional information. ■

Using Add Text on Heading 1–9 Styles

If the selected paragraph is assigned a Heading 1 through Heading 9 style, choosing Add Text ➪ *command* has the following effects:

- If you choose Add Text ➪ Do Not Show in Table of Contents, the style of the selected paragraph is changed to Normal.
- If you choose Add Text ➪ Level 1 through Level 9 and the selected paragraph is formatted with the corresponding Heading 1 through 9 style, the command has no effect.

- If you choose Add Text ➪ Level 1 through Level 9 and the selected paragraph is formatted with a Heading 1 through 9 style with a different level, the command applies the corresponding Heading # style. For example, if you apply Level 2 to a paragraph formatted as Heading 4, the paragraph will be reformatted as Heading 2.

Using Add Text on Non-Heading 1–9 Styles

If the selected paragraph is not formatted with a Heading 1–9 style, using Add Text ➪ Level 1 through 9 reformats that paragraph with the corresponding Heading # style.

If the selected paragraph is not formatted with a Heading 1–9 style, but a level has been assigned (for example, using Word 2010's Add Text command or some other method), using Add Text ➪ Level 1 through 9 leaves the style of the selected paragraph alone, but *changes the direct paragraph formatting to reflect the level selected.*

If you apply Add Text ➪ Do Not Show in Table of Contents to a non-Heading paragraph, the Outline level is set to Body text, and the style is left alone.

Using Outline Levels for the Table of Contents

In addition to using the Heading 1–9 styles, the Table of Contents feature also automatically uses styles that have outline levels assigned to them. Such styles show up with levels already assigned to them in the Table of Contents Options dialog box shown in Figure 33-3. If you want to use these, you don't have to do anything further, because Word uses them by default.

If you don't want to use non-Heading 1–9 styles that have outline levels assigned to them, remove the check next to Outline levels, shown in Figure 33-3. For additional information on assigning outline levels to non-Heading styles, see "Custom Levels for Non-Heading Styles" in Chapter 4.

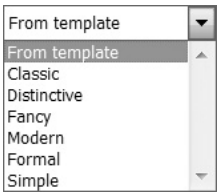
TOC Formats

In Figure 33-2, note the Formats setting in the General section. Click the arrow next to From template to display six additional options, shown in Figure 33-5. As you select each Formats option in the dialog box, both Print Preview and Web Preview change to show the effect of each choice.

The TOC field, which is used to create the table of contents, uses styles named TOC 1 through TOC 9 to format the table of contents. By default, it uses the settings for TOC 1 through TOC 9 that are stored in the current document template. If you choose one of the six alternatives, the TOC styles are redefined according to your selection.

FIGURE 33-5

You can use TOC styles from the template or choose from among six prefab format sets.



Caution

If you apply a different Format setting, your TOC styles are "permanently" redefined in that document. If you later delete the TOC field, your TOC styles remain redefined. If, for example, your table of contents styles previously used Times New Roman as the basic font, and Classic uses Cambria and Calibri as the fonts, the latter fonts will be kept for the TOC 1–9 styles, even if the table of contents field is deleted. Thereafter, From template and Classic will yield the same result. If you save that document, the table of contents styles in it are permanently changed. The only way to get back the former styles would be to reattach the underlying template and choose the "Automatically update document styles" option. Unless you want automatic update to be your permanent setting, however, make sure you change it back once you've restored the original table of contents style settings.

This brings us to the second caution. Apart from the preceding, if "Automatically update document styles" is enabled, any Format you choose — Classic, Distinctive, Formal, and so on — will be replaced the next time that document is opened. Unless changes are explicitly made to the underlying template, it will all be for naught. ■

TOC Styles

As noted in the previous section, Word uses nine built-in styles to format the table of contents: TOC 1 through TOC 9. If you don't like the way the table of contents looks, the best way to "fix" it is not by formatting the table itself. The best way is to change the TOC 1–TOC 9 styles.

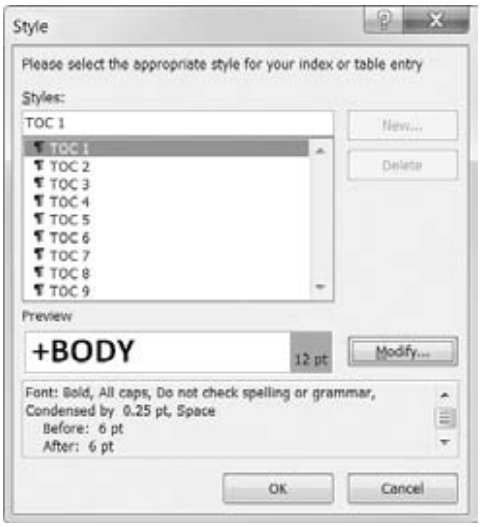
Caution

One of the mistakes users sometimes make with tables of contents is trying to manually reformat them because they don't like the appearance. This is a mistake because your manual efforts will be wiped out when the table of contents is updated. ■

To modify the TOC 1–TOC 9 styles, you can use the methods described in Chapter 9. Alternatively, you can use the Modify button in the Table of Contents dialog box (refer to Figure 33-2). Choose Table of Contents ➪ Modify. The Style dialog box appears with just the TOC styles, as shown in Figure 33-6. By default, TOC 1–TOC 9 are formatted using the default paragraph font. The only difference in their formatting is the left indentation setting. As you select different styles, notice that the Preview and Description change very little, except that the +Body preview scoots to the right as the level increases.

FIGURE 33-6

By default, TOC 1–TOC 9 are formatted identically except for the amount of the left indent.



To change the style definition for a TOC style, select the style and click Modify. The familiar Modify Style dialog box appears, as shown in Figure 33-7. In theory — and it's a pretty darn good theory — when you modify a TOC style, you assertively want all other items with that style assigned to change at the same time. It wouldn't do to have one TOC 1 line formatted with a .4 indent and 12-point Comic Sans and have the rest of the TOC 1 lines formatted with .8 indent and 10-point Cambria.

Tip

If you find the perfect blend of formatting for your tables of contents, when modifying each style you change, click to enable "New documents based on this template." This will make your changes available to future generations of tables of contents when using that template (which might or might not be `Normal.dotm`). ■

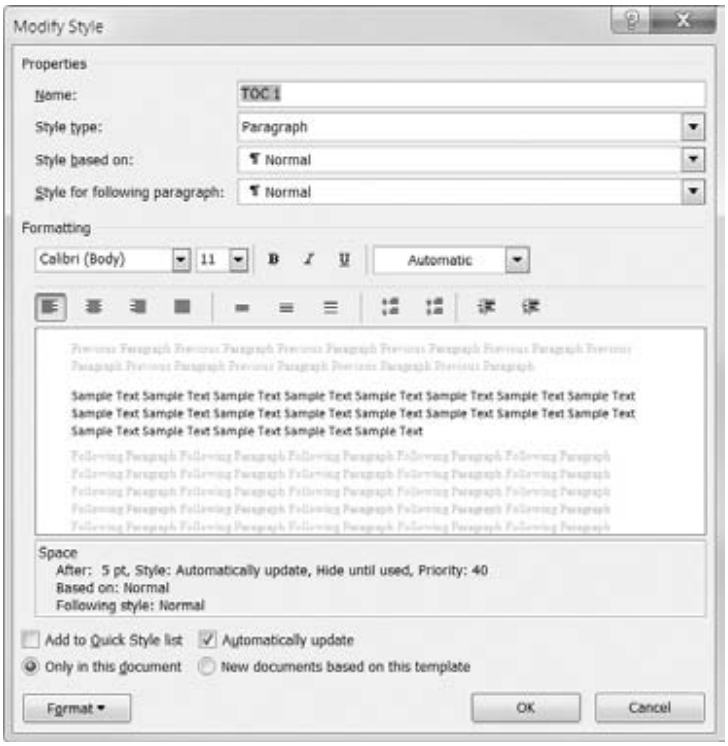
To make changes to the table of contents style, choose Format and proceed as shown in Chapter 9. When you're done, click OK.

Manually Creating a Table of Contents

Manually creating a table of contents requires two steps. The first step is to mark the heading or other items you want to include in the table of contents. The second step is to use the Table of Contents dialog box to instruct Word to use those marked items, rather than or in addition to styles.

FIGURE 33-7

All of the TOC styles default to Automatically update.



Manually Adding Selected Text

The most efficient way to mark entries is to mark them all at once when your document is just about finished. However, if you have a lot of self-discipline, you can mark them as you go along. It's your choice.

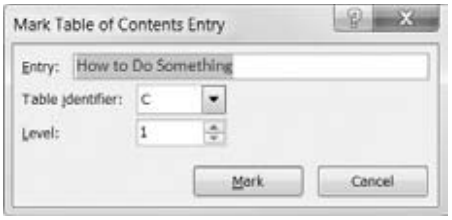
Assuming that what you want in the table of contents is exactly what you have in the text, the easiest way to mark entries is to select the entry and then display the Mark Table of Contents Entry dialog box, shown in Figure 33-8. The built-in keystroke for this is Alt+Shift+O. If necessary, make any changes in the Entry field and set the Level to the desired level in the document.

Note

Leave the table identifier as C unless you're making multiple tables of contents. By default, the table of contents field uses C, but you can create additional tables, as shown under "The TOC Field Code," later in this chapter. ■

FIGURE 33-8

By default, the table of contents field uses table identifier C.



If you have a lot of entries to mark, you will quickly discover why using Heading 1 through 9 styles is so much more efficient than manually marking entries. For the most part, using styles for all distinctive formatting and using the Table of Contents Options dialog box shown in Figure 33-3 to tell Word to use additional styles as levels should keep you from ever having to use the Mark Table of Contents Entry dialog box. But, you're here, so either you are curious or you haven't heeded all of the Biblical exhortations to use styles with pious devotion.

The Mark Table of Contents Entry dialog box is nonmodal, so it doesn't go away when you click Mark (the only apostle available in this particular dialog box). If all of your entries are ready to be marked, a good strategy is to select what you want to use for an entry, click Mark, select the next entry, click Mark, and so on until you're done. If you have hundreds of these to do, you might consider writing a macro, and you most certainly will give styles serious consideration the next time you confront a document like this one.

Note

TC fields are formatted as Hidden. If Hidden text is displayed, TC fields are displayed as field codes all the time, regardless of your setting in Word Options ➪ Advanced ➪ Show document content. Make sure they don't print by turning Print hidden text off in Word Options ➪ Display. You can toggle TC fields from view using Ctrl+Shit+8, unless Hidden text is checked in Word Options ➪ Display. If TC fields are hidden from view, you run a substantial risk of accidentally deleting them. ■

Inserting a Table of Contents Using Marked Entries

Once all your entries have been marked, in the References ribbon, choose Table of Contents ➪ Insert Table of Contents Field ➪ Options. In the Options dialog box (refer to Figure 33-3), if your marked entries are supplementing styles and outline levels, click to add a check next to Table entry fields. If you're using entries instead of styles and/or outline levels, remove the corresponding check(s). Once you're satisfied, click OK to insert the table of contents.

Maintaining and Updating

Generally, you need to perform two types of maintenance on a table of contents. One is to update the table of contents when the contents of the document have changed. The need for updating occurs when the headings have changed or when anything moves to a different page (because material has been added to or removed from the document).

To update the table of contents to reflect changes in the document, click anywhere in the table of contents and press the F9 key. Alternatively, right-click anywhere in the table of contents and choose Update Field. Word displays the Update Table of Contents dialog box shown in Figure 33-9. If none of the headings have changed, but only the page numbers, and/or you've ignored sage advice not to manually reformat a table of contents, you can save a little time and preserve that manual formatting by choosing Update page numbers only. If more substantial changes were made — such as headings added or removed, or additional items marked for inclusion — choose Update entire table. As previously noted, if you have made manual formatting changes other than through the TOC 1 through TOC 9 styles, those changes will be lost.

FIGURE 33-9

The Update page numbers only option preserves any touch-up editing you might have done.



The other type of maintenance occurs if you want to change the way you present the table of contents. Perhaps you were including only levels 1 through 3, and now want to include level 4 as well. Perhaps you've changed your mind about hyperlinks or some other aspect. To edit the table of contents settings, select the entire table of contents, right-click the selection, and choose Edit Field. In the Field dialog box, click Table of Contents. This redisplays the Table of Contents dialog box shown in Figure 33-2, replete with your current settings. Make any changes you need to make and then click OK. Word now prompts as shown in Figure 33-10. If you're sure, click OK.

FIGURE 33-10

Verify that the correct table is selected before clicking OK.



Converting a Table of Contents into Text

Sometimes it's desirable to convert the table of contents into actual text, rather than a field code. In some cases, you will want to have the table of contents in a separate document. You can always reinsert the field code if needed later, using the techniques shown in this chapter. To convert a table of contents into actual text, select the entire table of contents and press Ctrl+Shift+F9.

Tip

Have you ever wanted just a document's outline in a separate file? When you display a document in Outline view, the whole document is really there. You can select what you see and then paste it elsewhere to get just the outline. To get a separate copy of the outline, insert a table of contents using the outline levels you need to see, and then use Ctrl+Shift+F9 to convert it to actual text. Presto! Instant outline! Why would you want just the outline in a document? See Chapter 54 and read about using Word and PowerPoint together for the exciting answer! ■

Recycle, Recycle, Recycle

Once you get a table of contents format just the way you like, you can save it for later use. Select the table of contents and in the References ribbon, choose Table of Contents ➪ Save Selection to Table of Contents Gallery. In the Create New Building Block dialog box, type a name for the table of contents, leave Gallery set to Table of Contents (so it will show up in the list when you first click Table of Contents in the References ribbon), and set Save In to the desired location (usually the template on which the document is based or the Building Blocks template). You might want to consider setting Options to Insert content in its own page, because tables of contents usually are on a separate page. Click OK when you're done. Now your table of contents is ready to use the next time you need one.

The TOC Field Code

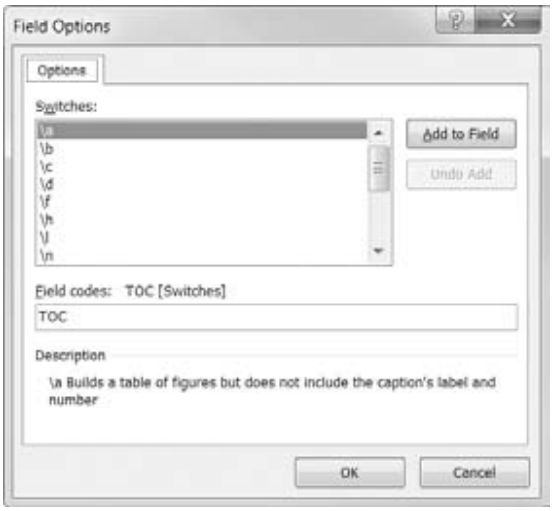
Word creates the table of contents using a TOC field code. If you've never looked at the table of contents field code, you might be surprised that such a simple little code could be so powerful. By default, the table of contents field code that Word uses is as follows:

{ TOC \O "1-3" \H \Z \U }

In fact, it could be as simple as { TOC } and still produce a serviceable table of contents. To fully understand what each of the switches means, from the Insert ribbon, choose Quick Parts ➪ Field. In the Field dialog box, under Field names:, scroll down and click TOC, but don't click the Table of Contents button or you'll be taken to the Table of Contents dialog box — and you've already made that particular pilgrimage in this chapter. Click Field Codes instead. This displays the TOC field with no switches in the Field Codes box. Click the Options button to see a list of the possible switches, shown in Figure 33-11.

FIGURE 33-11

The TOC field code has 16 different switches you can use.



Look at the three switches shown earlier in the default TOC field code:

- \H**:** Hyperlinks the entries and page numbers within the table of contents
- \U**:** Builds a table of contents by using the applied paragraph outline level
- \Z**:** Hides page numbers within the table of contents when shown in Web Layout view

Click each of the switches to see additional options. You never know when they might prove useful. In this case, for example, you see that hyperlinking and hiding page numbers, combined into the single "Use hyperlinks instead of page numbers" option shown in Figure 33-2, are really two distinct options! If you really want one but not the other, you can have it!

In the document, display the table of contents and press Alt+F9 to toggle field code display. Remove the unwanted switch and press Alt+F9 to toggle field code display off. Right-click the field and choose Update Field (or simply press F9), choose the desired option in Figure 33-9, and click OK.

Summary

In this chapter you've seen tables of contents, inside and out. You now have yet another reason to use styles religiously, and not just because the Bible tells you to! You should now be able to do the following:

- Quickly insert a table of contents based on heading styles in your document
- Slowly and tediously mark table of contents entries for manually creating a table of contents because you were shortsighted and didn't use Heading styles
- Use a table of contents to create a separate outline of any document
- Selectively use non-Heading styles in a table of contents
- Save a custom table of contents to the Table of Contents Gallery for reuse
- Perform custom edits to the TOC field to change features to which the Table of Contents dialog box doesn't provide access

CHAPTER 34

Master Documents

If you've ever struggled with a multi-file Word document, you will appreciate the idea behind Word's Master Document feature. In concept, a Master Document lets you create a single smaller file that provides access to, command of, and control over a number of smaller documents, called *subdocuments*. Using a Master Document potentially solves a number of different problems, including managing a complex assortment of cross-references when different sources are housed in a variety of different documents. Other problems potentially solved include creating inclusive tables of contents, indexes, and tables of figures, as well as coordinating headers, footers, page numbers, footnotes, and endnotes.

Another potential advantage in all this is the possibility that different users can check out different components of the Master Document for editing. Thus, someone in one office might be working on Chapter 1, someone else working on Chapter 2, and so on, all at the same time. That way, in theory, each user who edits any given piece has exclusive access, and nobody would ever have to deal with possibly conflicting edits by multiple contributors.

IN THIS CHAPTER

- **Understanding Master Documents**
- **Using the Master Document ribbon tools**
- **Creating Master Documents**
- **Working with Master Documents**

Master Documents: The Sad History

Did you notice the qualifications and hedging in the opening paragraphs? "Appreciate the idea . . ." "In concept . . ." "In theory . . ." "Potentially"? Like those personal flying devices that made the newsreel rounds in the 1950s, Master Documents have never quite gotten fully off of the ground. It's a good concept, but the implementation leaves much to be desired.

Master Documents have long suffered from a number of serious problems, not the least of which is a strong propensity to document corruption as well as crashes (not to overuse the personal flying device analogy, but it does fit rather well). Although Master Documents sound good in concept, the sad truth is that they don't deliver a number of expected advantages — not because the concept is wrong, but because the feature is so unstable, making it too unreliable to use.

Because the Master Document itself is a smaller document that serves as a control center for all of the subdocuments, the expectation was that it would use less system memory and result in overall documents that were easier to handle. As it turned out, however, Master Documents often required at least as much memory as the most conspicuous alternative — which is to put all of the document components into a single document. Depending on the size of the individual components, as well as what they contain (such as numerous tables, equations, and graphics), using a Master Document can be about as easy as trying to steer an aircraft carrier through the aisles of your neighborhood grocery store.

But that wasn't the worst of it. The worst of it was that the Master Documents feature tended to corrupt the component documents. All of the coordination advantages in the world aren't worth anything if there is a fairly strong likelihood that the document components are going to become so hopelessly corrupted that they can't be opened.

Are the "X" Files Master Documents' Salvation?

Sadly, no. At least not yet. Master Documents were still seriously broken in Word 2007, and Word 2010 continues in that proud tradition. Use Master Documents at your own risk.

Worth the Risk?

Are Master Documents worth the risk? That's entirely up to you. Are you feeling lucky? If you do decide to take the plunge, you can do some things to reduce the risks and enhance your chances for success:

- If you ignore the rest of these bullets and decide to use component documents in a Master Document, rather than `INCLUDETEXT` copies, make a complete backup of all component documents before entrusting them to the Master Document feature. As work proceeds, continue to make backup copies of the components, and test them to make sure they aren't corrupted before overwriting older backup copies.
- Don't use the actual component documents themselves as subdocuments. Never let the Master Document feature touch the actual source documents. Instead, keep those documents separate. A low-labor, low-risk way to implement this is to have subdocuments that consist of linked copies of the actual files, using the `INCLUDETEXT` field. See "Inserting Text from Files" in Chapter24. When a source document is changed, update the `INCLUDETEXT` field in the subdocument. That way, the actual source documents can't become corrupted, because the Master Document feature never really touches them.
- Use the same template for all documents that will be components for the Master Document.

- Trust Master Documents only at arm's length. Don't use the check-in and check-out features on documents you value. Instead, put the component documents themselves onto a SharePoint server (for example), and let *it* handle the check-ins and check-outs.
- Master Documents' potential strength is in coordinating things such as tables of contents, indexes, page numbering, and cross-references. Page numbering, tables of contents, and indexes are easy to redo if the Master Document feature fails. Cross-references are not. Although it's more work, create cross-references from the individual component documents, and don't rely on the Master Document itself. It may be more work, but it's less work than having to redo everything when the Master Document feature fails.
- Use Word's Heading 1 through 9 styles for formatting your headings, keeping in mind that they will need to be coordinated at the top level. If the Master Document is organized into chapters, with each chapter residing in a single document, reserve Heading 1 for chapter titles, rather than for major headings within chapters.

Note

One of the greatest potential advantages of Master Documents — where the component documents are actually used rather than the INCLUDETEXT substitute — is for performing Replace operations across multiple files at the same time. For example, suppose you need to change Smith to Smyth in 100 chapter files. Imagine doing it with one simple Replace command. If you succumb to the temptation, make a complete backup copy of the components before proceeding. ■

The balance of this chapter assumes that you have read these suggestions and admonitions and will heed them accordingly. This chapter proceeds more or less as if there were nothing whatsoever wrong with the Master Document feature, describing how things should work in an ideal world, all the while assuming that you're backing up like crazy and doing whatever is necessary to safeguard your work. Of course, there will be the occasional reminder that you're playing with fire.

Creating Master Documents

Creating a Master Document is simple. It's as simple as driving your car off a cliff, some might say. But, cliffs usually have guard rails. Master Documents don't.

You have essentially three approaches to creating a Master Document. Once you have a handle on the basic principles, the approaches can be mixed and matched as needed:

- **Create from scratch:** Create a new document, using Heading styles to write an outline of the overall document (where Heading 1 corresponds to the top levels for components that will become subdocuments). Then use the Master Document tools to subdivide the document into separate subdocuments.
- **Organize from existing files:** Create a Master Document from which you assemble and coordinate existing unsuspecting files. Remember to back up those files before turning them into subdocuments!

- **Convert an existing document:** When a document has become unwieldy, convert it into a Master Document, consigning major sections as subdocuments. Again, you won't do this without backing up that unwieldy document, will you?

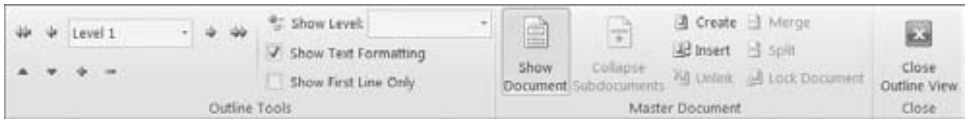
Before launching into how to do this, it's helpful to know what's in your tool shed. Let's take a look.

The Master Document Ribbon

In theory, Master Document view is Outline view on steroids. In the View ribbon, or in the Views section of the status bar, click the Outline tool. To fully expose all of the Master Document tools, click Show Document, in the Master Document section of the Outlining ribbon, as shown in Figure 34-1.

FIGURE 34-1

Click Show Document to display all of the Master Document tools. Most tools are grayed out until a Master Document has actually been created.



Tools in the Master Document section of the Outlining ribbon are as follows:

- **Show Document:** Toggles the display of all Master Document tools except for Show Document and Collapse Subdocuments.
- **Collapse Subdocuments:** Toggles between showing the path and name of the subdocument and showing the subdocument content itself.
- **Create:** Transforms selected outline items into subdocuments. Each major outline division becomes a separate file.
- **Insert:** Inserts an independent file into the Master Document as a subdocument. Use this approach to assemble existing files into a Master Document.
- **Unlink:** Deletes the link to the subdocument and copies the subdocument contents into the Master Document. If you do this for all subdocuments, the resulting document is no longer a Master Document.
- **Merge:** Combines multiple subdocuments into a single subdocument. The newly combined subdocument inherits the name of the first subdocument in the selection.
- **Split:** Splits the selected subdocument into new subdocuments at the next lower level of organization. For example, if the subdocument has one Heading 1 but multiple Heading 2 styles, there will be one subdocument for each Heading 2 in the selection.
- **Lock Document:** Toggles the write state of subdocuments in the selection on and off.

Creating a Master Document from Scratch

Any document you create in Word has the potential to become a Master Document. (Yes, little document file, you can someday become a big strong Master Document if you eat your alphabet soup!) A document becomes a Master Document the moment you use Master Document view to consign different sections into different physical files on your disk.

If you plan to create large documents that will need indexes and tables of contents, and use cross-references, using a Master Document to create and control the components can save you a lot of time and aggravation (assuming the components don't become hopelessly corrupted by the experience).

To create a Master Document from scratch, choose File ➪ New. To create the document based on `Normal.dotm`, with Blank document selected in the Blank and Recent section of the New Document dialog box, click Create. Alternatively, navigate to a different template as shown in Chapter 31, and then click Create.

Using either the status bar or the View ribbon, click an Outline view tool (or press Alt+Ctrl+O). To display the rest of the ribbon's Master Document tools, click Show Document in the Master Document section of the Outlining ribbon.

You're now in Outline view. Using Heading level styles, create an outline for your document, as shown in Figure 34-2. For easy navigation, keep the following keystrokes in mind:

- **Alt+Shift+Left/Right:** Demote or promote the current paragraph and all collapsed subheadings.
- **Alt+Shift+Up/Down:** Swap the current paragraph with previous/next paragraph, moving all collapsed subheadings with it.
- **Alt+Shift+1 through 9:** Display levels 1 through 9 (for example, Alt+Shift+3 displays levels 1 through 3, Alt+Shift+6 displays levels 1 through 6, and so on).

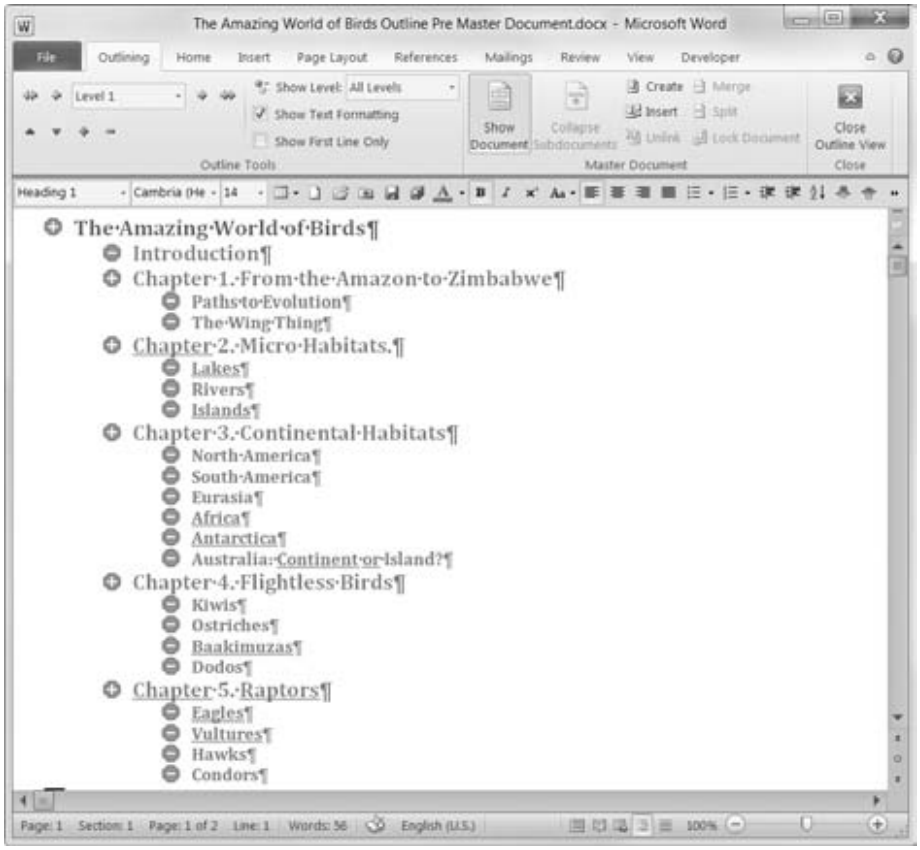
You can also use the ribbon tools to control the outline view and structure if you're not comfortable using the keyboard shortcuts. Keep in mind that once the outline exists, reorganization is a cinch, precisely because you're using Heading 1 through 9 styles for organization. For additional information on creating and navigating outlines, see "Outlining" in Chapter 4.

Caution

Until the document becomes a Master Document, reorganization using keystroke navigation is a cinch. After it's a Master Document, however, the cinch becomes a difficult to manage knot. That's because, as you'll soon see, Word brackets each subdocument with section breaks. Because of this, you will no longer be able to easily move and rearrange document parts using the methods just described. See "Handle with Care — Moving Subdocuments," later in this chapter, for more information. ■

FIGURE 34-2

When you create a Master Document, the major headings selected will become subdocuments.



If you plan to have major document sections or parts (such as the major parts in the *Word 2010 Bible*), it's often best to reserve the top one or two heading levels for use in the Master Document itself, making Heading 2 or 3 the top level used within each subdocument.

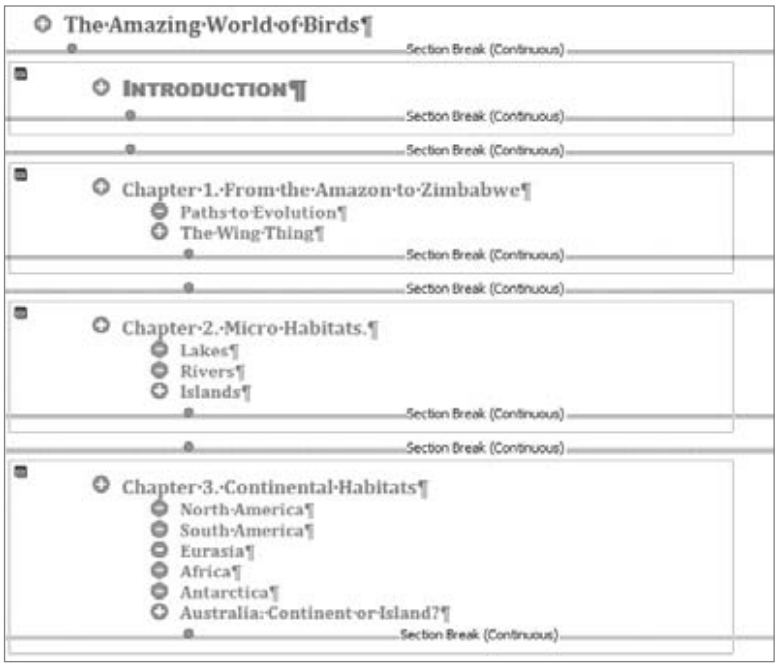
Once the outline is "done" (you can always make changes later), select the lower headings that you want to become subdocuments, and click the Create tool in the Master Document section of the Outlining ribbon. In the example shown in Figure 34-2, to form subdocuments for the Introduction and each Chapter, you would select everything in the outline except for the title.

After you click the Create tool, notice that the appearance changes to something like that shown in Figure 34-3. For this view, Ctrl+Shift+* was pressed to toggle the display of nonprinting

formatting marks so that they show up. This way, you can see that Word has inserted continuous section breaks around each of the subdocuments. Press Ctrl+S or otherwise click Save to save the Master Document and the subdocuments.

FIGURE 34-3

Word encloses each subdocument with section breaks.



To understand exactly what has happened, it's useful to take a look in the current document folder. Choosing File ➪ Open, you see that Word has created the five separate files shown in Figure 34-4. Here, the Master Document itself is contained in the first file listed. Word defaults to its usual practice of using as much as possible of the first paragraph in a document for the name of the Master Document. The Introduction and the five Chapter files are all subdocuments.

FIGURE 34-4

When you create a Master Document, Word puts each subdocument into a separate file.



Note

Did you notice a possible strategic error in how this was done? In this example, it appears that the chapter numbers were created by typing the numbers shown. If there is any chance that chapters might be merged, rearranged, or have new chapters inserted between them, you would do well to use some kind of automatic numbering to handle the chapter numbers. There are a variety of ways to do this. A personal favorite is using SEQ fields. They bring with them none of the problems that plague Word's Numbering tool.

In fact, because field codes are not displayed in Figure 34-2 and Figure 34-3, you don't see that the numbers are indeed field codes: { SEQ CHAPTER }. In each subdocument, the chapter number might be displayed as Chapter 1 (if you update the field), but when updated in the Master Document it will display correctly. ■

Creating a Master Document from Existing Documents

If you're in the middle of a large project and are slapping yourself in the head because you didn't know about Master Documents, it's not too late to take advantage of this feature. Just keep in mind the earlier admonitions about making backup copies of everything.

To create a Master Document from existing files, choose File New as before to create a new document to serve as the Master Document. It isn't essential, but it will greatly simplify your life if the Master Document itself and each of the component files are all based on the same document template.

Type a title and any other setup text you might need, and then position the insertion point where the first subdocument (which you have backed up, right?) will go. Having religiously made a backup copy of that file, display the Master Document ribbon tools as noted earlier, and click the Insert tool. In the Insert Subdocument dialog box, navigate to the first file you want to destroy — oops, I mean insert. Choose Open.

If the inserted subdocument's template is different from that of the Master Document, Word notifies you as shown in Figure 34-5. This is simply an information box. If you click the X or press the Esc key, the document is inserted nonetheless. Word doesn't let you change your mind at this point in the process. In fact, there possibly will be additional message boxes, some of which actually matter. If you change your mind, just keep dismissing the messages and be prepared to press Ctrl+Z to undo the insert.

If the subdocument and Master Document contain user-created styles of the same name, you will be prompted as shown in Figure 34-6. Even if the styles are identically defined, Word offers you an opportunity to rename the incoming styles to something else. Rename the incoming style if the styles really *are* different and used for different things.

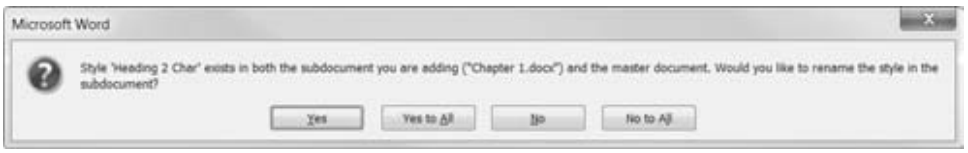
FIGURE 34-5

It isn't essential that the inserted subdocuments use the same template as the Master Document, but it helps you avoid message boxes like this one.



FIGURE 34-6

Word offers to rename any user-created styles that exist in both the subdocument and Master Document.



The options are as follows:

- **Yes:** Word automatically renames the incoming style, and then prompts about the next one. Word appends a 1 to the end of the style name (GX1, in this case). In later subdocument insertions, Word increments as needed (that is, GX2, GX3, and so on).
- **Yes to All:** Word automatically renames all incoming styles.
- **No:** Word skips the noted style and prompts about the next one. Word applies the Master Document's version of the style to the associated text.
- **No to All:** Word skips all of them, and uses the Master Document's version of all user-created styles for the associated incoming text.

Once you've added all of the files you want to insert, when you save, the Master Document assumes command and control of the subdocuments, and saves them whenever changes are made to the Master Document.

Converting an Existing File into a Master Document

So far, you've seen how to create a Master Document from scratch, as well as how to assemble a new Master Document from existing documents. You can also create a Master Document from a single existing file. When you do this, Word uses Heading 1–9 styles as a basis for creating a series of subdocuments. Because Word will make major changes to your document, it is essential that you make a backup copy.

Open the file you want to convert and take a moment to wish it well on its journey into the unknown. Just kidding. After all, you made a backup copy. Right? We're not going any further

until you swear on a stack of *Word 2010 Bibles* that you've made a backup copy of the file and have stored it in a safe place where the Master Document feature can't find it.

As noted earlier, switch to Outline view and in the Outlining ribbon, click Show Document. Use the Show Level tool so that the headings showing correspond to the way you want to subdivide the document. If you want to subdivide each Heading 2 level into a subdocument, choose Level 2.

Select just the heading levels you want to convert, and click the Create button in the Master Document section of the Outlining ribbon. Now the outline looks much like it did before, except that section breaks now bracket each subdocument. When you save the Master Document, each of the subdocuments will be assigned a name based on the beginning text of each subdocument. If you don't like the names, you can rename them.

Working with Master Documents

Working with Master Documents can be fun and exciting, filled with suspense and intrigue. For those without infinite patience, this section's mission is to lift the veil as much as possible, showing you how to do things you're just dying to know how to do. You start by learning how to convert a Master Document back into a single-file document.

Converting Subdocuments into Master Document Text

This section could be subtitled "Converting Master Documents into Single-File Documents." When working with Master Documents, text can reside either inside the Master Document itself or in subdocuments. Sometimes, you might want to do this if you've been butting heads against the "Too many files are open" error. Or, you might want to do this because you realize that some things that are subdocuments logically work better as Master Document text instead.

You can convert subdocuments into Master Document text easily. In fact, if you prefer to revert to a single document — having tired of seeing 40 saves flash by each time you press Ctrl+S — you can do that, too.

To convert subdocuments into Master Document text, click or select the subdocuments you want to subsume, and click the Unlink tool in the Master Document section of the Outlining ribbon. When all subdocument text has been subsumed, the Collapse/Expand Subdocuments tool becomes grayed out.

Merging Subdocuments

One of the fun things about Master Documents is the fact that they can surprise you. Don't you love surprises? One of the surprises is that there is a limit to how many subdocuments you can

have in a Master Document, but Word won't tell you what that limit is. Actually, it depends on a variety of things, such as how many files currently are open in Windows, how much free memory you have, which way the wind is blowing, and whether or not you're drinking decaf. Predictability is highly overrated, right?

In any event, when you reach this limit, Word will tell you that it can't save your documents. At this point, you have a number of options (omitting the ones that involve firearms), including the following:

- Cancel the save, close other programs, and try saving again.
- Convert some of the subdocuments into Master Document text, and try saving again.
- Merge some of the subdocuments and then try saving again.

In addition to merging subdocuments for this urgent need, you might also want to combine them if you find that you're having to flit from file to file more often than you deem necessary.

To merge, while in Master Document view (Outlining ribbon with Show Document selected), select the subdocuments you want to merge, ensuring that you include each subdocument in its entirety, and click the Merge tool in the Master Document section of the Outlining ribbon. When you do this, the several subdocument icons are replaced by a single one. All of the merged subdocuments are combined into a single file that keeps the name of the first subdocument in the group selected.

Locking Subdocuments

When managing a complex project, you sometimes don't want parts of a Master Document changed. You can lock all or part of a Master Document against write access. When locked, a lock appears next to the subdocument icon, as shown in Figure 34-7. To lock subdocuments, select the subdocuments you want to lock and click Lock Document. Note that Lock Document is a toggle; if you click different locked and unlocked subdocuments, the Lock Document tool looks flat for unlocked subdocuments, and pushed-in for locked subdocuments. To unlock a locked subdocument, select it and click Lock Document again.

Expand/Collapse Subdocuments

In Figure 34-3, a Master Document is shown in expanded form. When you first open a Master Document, it appears as shown in Figure 34-8. This has been known to induce angina and panic attacks. Relax. Your Master Document isn't gone (we hope). Click the Expand Subdocuments tool in the Master Document section of the Outlining ribbon to restore it as shown in Figure 34-3.

FIGURE 34-7

Locked subdocuments can be opened, but changes can't be saved.



FIGURE 34-8

When you open a Master Document, all subdocuments are locked because the Master Document is collapsed.



Handle with Care – Moving Subdocuments

In Chapter 4, you learned how wonderfully easy it is to reorganize documents in Outlining mode. In fact, earlier in this chapter you were reminded about that ease. Once you've turned your work into a Master Document, however, much of that ease goes out the window.

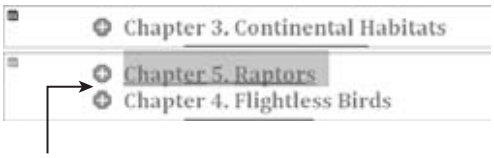
In Figure 34-3, your attention was directed to the fact that Word encases each subdocument in section breaks. When you move a subdocument, it is imperative that the opening and closing section breaks be moved as well. If one of them is left behind, the moved section will suddenly become part of another subdocument, so select with care, and drag and drop with even greater care.

It is almost impossible to properly move a subdocument unless section breaks are visible (toggle on and off with Ctrl+Shift+8). In Figure 34-9, Chapter 5 was moved to before Chapter 4. Notice on the left that there's now only a single subdocument icon for the two chapters. Many

attempts were made without section breaks showing, trying to be very careful about the selection and where it was dragged and dropped. No attempt was successful! Even the venerable F2 method of moving a selection (see "The F2 Factor" in Chapter 10) yielded a rude "This is not a valid selection" error message. Make sure you turn section breaks on before trying to select and move a subdocument.

FIGURE 34-9

When moving subdocuments, accidents are easy and likely.



Summary

In this chapter, you've seen the good and the bad about Master Documents. You now have enough information to decide for yourself whether any of the benefits are worth the risks. You know a variety of ways to create Master Documents, as well as how to convert one back into a single-file document. You should now be able to do the following:

- Create a Master Document from scratch
- Create a Master Document from existing multiple documents
- Create a Master Document from a single large file
- Lock subdocuments against write access
- Merge subdocuments when the need arises
- Nod knowingly when someone disses the Master Document feature

CHAPTER 35

Footnotes and Endnotes

Footnotes and endnotes contain material that, if presented in the text, tends to disrupt the reader's train of thought. In some types of documents — academic, professional, and legal, for example — footnotes or endnotes are mandatory. In less formal documents, footnotes occur less often and endnotes hardly at all. In information documents such as correspondence, footnotes and endnotes are almost completely absent.

Footnotes begin on the same page where the reference is made. In certain citation-heavy documents such as legal and scientific documents and papers, it is not uncommon for footnotes to begin on one page and extend onto one or more additional pages. Though a bit awkward for readers, it is often less awkward than having to search for an endnote at the end of the document to find an explanation for what was said in the text.

Endnotes are deferred until the end of the document. In a book, endnotes often occur at the end of each chapter. In magazines and journal articles, they usually occur at the end of the article.

Word enables you to use footnotes, endnotes, or both. You can also determine how they are presented, up to a point. Word even enables you to specify the footnote and endnote separators, continuation separators, and the continuation notice itself. Because many publishers and publications are rather specific about how to present footnotes and endnotes, Word's flexibility usually helps you conform to those varying specifications.

IN THIS CHAPTER

Footnotes

Endnotes

Footnote and endnote separators

Footnote and endnote styles

Footnotes and Endnotes Basics

The two major control centers for footnotes and endnotes are the Footnotes section of the References ribbon, shown in Figure 35-1, and the Footnote and Endnote dialog box shown in Figure 35-2. Launch the Footnote and Endnote dialog box by clicking the launch button in the lower-right corner of the Footnotes section of the References dialog box. You can also activate the Footnote and Endnote dialog box by right-clicking the footnote or endnote area in the document and choosing Note options.

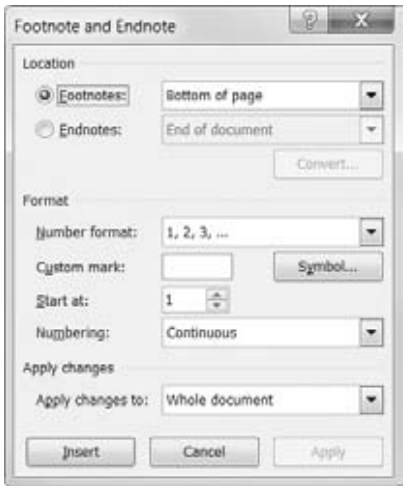
FIGURE 35-1

Use the Footnotes group to insert footnotes and endnotes and to launch the Footnote and Endnote dialog box.



FIGURE 35-2

Set footnote and endnote options using the Footnote and Endnote dialog box.



Frequent footnote and endnote users will find these controls useful mostly for navigation and setting options. They will instead prefer the keyboard shortcuts:

- **Alt+Ctrl+F** — Insert footnote now.
- **Alt+Ctrl+D** — Insert endnote now.

If you ever need a reminder about these keystrokes, hover the mouse button over the Insert Footnote or Insert Endnote tools in the ribbon. The Super Tooltip includes the shortcut key assignments.

Footnote and Endnote Options

Footnote and endnote options, shown in Figure 35-2, are explained in Table 35-1.

TABLE 35-1

Footnote and Endnote Options

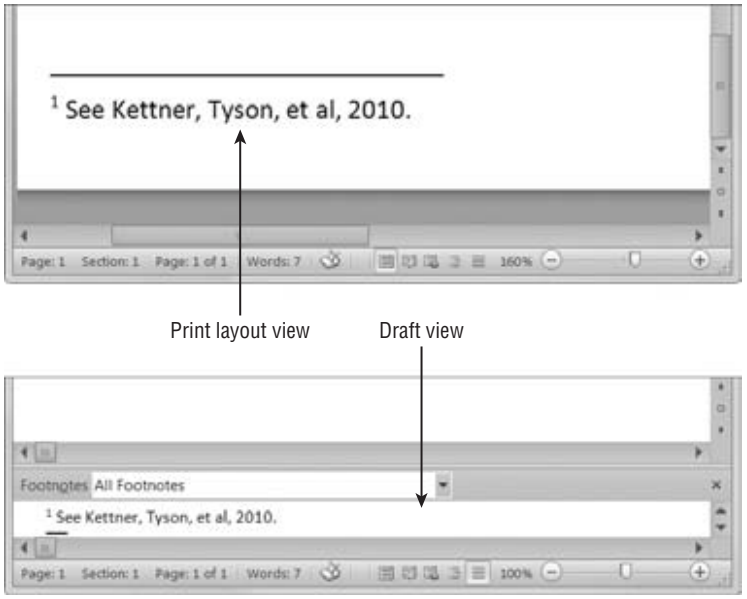
Option	Choices
Footnotes location	Bottom of page or Below text. Bottom of page puts the footnotes inside the bottom margin area, above any footer. Below text puts them above the margin area at the end of the text on the page where they occur.
Endnotes location	End of document or End of section. Notes begin at the end of the document or the section in which they occur, immediately after the text, above the margin area.
Number format	Endnote and Footnote number formats are independent of one another. Both offer identical numbering formats (1, 2, 3/a, b, c/A, B, C/i, ii, ii/I, II, III, and legal footnote symbols). When specifying the legal symbols, they will double, triple, and so on, if the list of available marks is exhausted.
Custom mark	Choose a custom mark to use for the footnote or endnote symbol. You can specify only one. If you choose the ever-popular *, you will get *, **, ***, and so on, for the first, second, third, and so on, notes.
Start at	Specify the number where you want footnote or endnote numbering to start. This usually is used in conjunction with the Apply changes to this section setting.
Numbering	Can be continuous throughout the document, restarted each section, or restarted each page.
Apply to	Options are Selected sections, This section, and Whole document.

Inserting a Footnote

To insert a footnote, put the insertion point immediately after the character where you want the footnote reference mark to appear (usually a superscripted number or symbol that appears in the text), and press Alt+Ctrl+F, or click Insert Footnote in the ribbon. If you're composing in Print Layout view, the insertion point jumps to the footnote area. If you're composing in Draft view, the Footnotes pane, shown in Figure 35-3, opens.

FIGURE 35-3

In Draft view, footnotes are composed in the Footnotes pane. In Print Layout view, they are composed in the footnote area, either under the text or at the bottom of the page.



Type the footnote, including any desired formatting and punctuation. Then click back in the text to continue typing.

Tip

To get back to where you were in the text when entering footnotes or endnotes, you usually can press one of the GoBack keyboard shortcuts, Shift+F5 or Alt+Ctrl+Z. Most speed typists prefer this to having to reach for the mouse — you can either double-click the footnote number or click in the text where you want to continue writing. If you're composing in Draft view, you can close the Footnotes pane by pressing Alt+Shift+C or clicking the X in the upper-right corner of the Footnotes pane. ■

Inserting an Endnote

To insert an endnote, with the insertion point where you want the reference mark to appear, press Alt+Ctrl+D or click Insert Endnote in the ribbon. As with inserting footnotes, the mode depends on whether you are in Draft or Print Layout view. It can be pretty disconcerting to have the insertion point suddenly jump to the end of the document, but keep in mind that the GoBack keystrokes can save you from having to go on a hunting expedition.

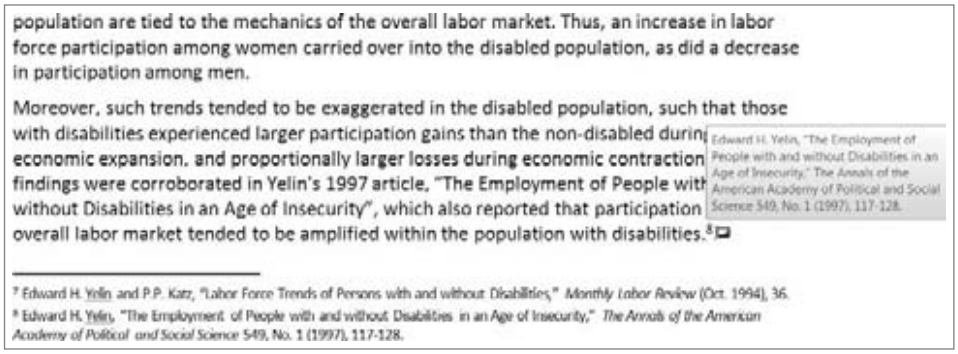
Displaying and Editing Footnotes and Endnotes

You have several ways to display and access footnotes and endnotes, depending on your settings. In both Print Layout view, as shown in Figure 35-4, as well as in Draft view, you can hover the

mouse pointer over a footnote or endnote reference mark in the text to display the text of the note in a tooltip.

FIGURE 35-4

Hover the mouse over a footnote/endnote reference mark to display a tooltip containing the note.



Note that the hover method does not work if you have customized Word not to display tooltips. In File ➪ Options ➪ Display tab, under Page display options, verify that "Show document tooltips on hover" is enabled.

To edit a footnote or endnote, use either of the following methods:

- In the References ribbon, click Show Notes. In Print Layout view, this provides access just to the notes on the current page. In Draft view, this provides access to all notes, using the notes pane.
- In the text, double-click on the reference mark for the note you want to edit. This opens the note or the notes pane, depending on the current view.

When the footnote or endnote you want to edit is displayed, edit it using ordinary editing techniques.

For navigating footnotes, in the References ribbon, you can use the drop-down arrow by the Next Footnote tool to select Next or Previous Footnote or Endnote. When the insertion point is in the text, this moves you to the indicated reference mark in the text area. When the insertion point is in the notes area or notes pane, this moves you to the next or previous footnote or endnote.

To navigate footnotes and endnotes, you can also use the Browse Object buttons in the vertical scroll bar to browse by endnote or footnote, as discussed in Chapters 2 and 11. These work in conjunction with the Next Footnote tool in the ribbon, as well as with the Go To tab in the Find and Replace dialog box.

Deleting Footnotes and Endnotes

Deleting footnotes and endnotes is easy, but potentially confusing. Among many users, the first impulse is to delete the most visible aspect of the footnote/endnote — the footnote/endnote itself. However, that deletes only the text of the note, stranding the footnote or endnote reference mark in the text.

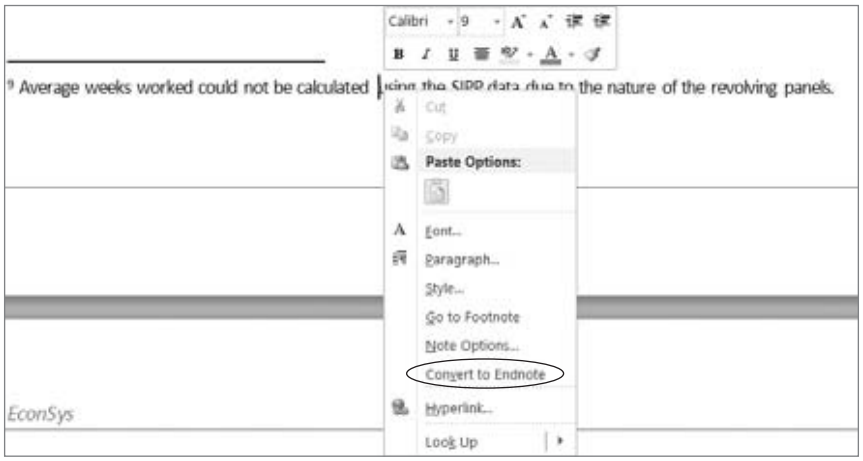
To delete a footnote or endnote, select the note reference mark in the text area of the document and press Delete or Backspace. This removes the reference mark as well as the footnote or endnote.

Converting Footnotes and Endnotes

If you change your mind and decide that a given endnote/footnote should really be a footnote/endnote, respectively, you're in luck. In the footnote area, right-click anywhere in the footnote or endnote you want to convert, and choose Convert to Footnote or Convert to Endnote, as shown in Figure 35-5, whichever is appropriate.

FIGURE 35-5

You can easily convert between footnotes and endnotes.



Note

If you click Go to Footnote (or Go to Endnote), the insertion point is transferred to the location in the text where the reference mark occurs. ■

Tip

If you want to convert all footnotes or endnotes, the quickest way is to switch to Draft view. Then, either click Show Notes in the References ribbon or double-click any reference mark in the text. This displays the

Endnotes or Footnotes pane. Use the drop-down arrow at the top of the pane to select All Footnotes or All Endnotes. Press Ctrl+A to select the entire contents of the current pane, right-click, and choose the Convert To option. ■

A Matter of Style

Footnote and endnote formatting is controlled by a set of styles. Although you can format footnotes and endnotes directly, it is much more effective — not to mention easier and more consistent — to change the styles involved. Of course, if you want an italic or bold word, direct formatting is fine. For underlining or italicizing references, however, you'd be better off using character styles, just in case somebody suddenly tells you that you need to reformat them all according to the East Podunk Manual of Style.

Footnote Text and Endnote Text Styles

Footnote and endnote text is controlled by the Footnote Text and Endnote Text styles. These are both linked styles that can be used to format paragraphs or smaller selections of text. Typically, however, you would use them for formatting the entire footnote or endnote.

To modify either of these, the easiest way is to display the note for editing, and press Ctrl+Shift+S to display the Apply Styles pane. Verify that Footnote Text or Endnote Text is displayed, as shown in Figure 35-6, and click Modify. Use the techniques shown in Chapter 9 to modify the style, taking care to enable the "New documents based on this template" setting if you want the style change to become part of the document's template.

FIGURE 35-6

The Apply Styles pane (Ctrl+Shift+S) provides handy access when you want to quickly modify a style.



Reference Mark Styles

The footnote and endnote numbers themselves are controlled by the Footnote Reference and Endnote Reference styles. Unlike the Footnote/Endnote Text styles, the reference styles are character styles. These two styles are used to format the reference marks in the body of the document as well as at the beginning of the actual footnotes and endnotes themselves. To modify the style for either of these, select a reference mark — in the text area or in the notes area — and press Ctrl+Shift+S as indicated previously, click Modify, and so on.

Separators and Continuation

When you use footnotes and endnotes, Word uses a combination of separators and continuation notices to identify the footnote and endnote sections for the reader. If the built-in separators and continuation notices don't meet your needs, you can specify different ones.

To change, set, or reset separators and continuation marks, you must be in Draft view. On the References ribbon in the Footnotes group, click Show Notes. If the document contains both endnotes and footnotes, you will be prompted for which area you want to view. Click View Footnote Area or View Endnote Area, according to which one you want.

Using the drop-down arrow shown in Figure 35-7, pick the item you want to change. It will appear in the pane. Reformat what's shown or delete it and insert your own. When you're done, click the X to close the notes pane. Note that with any separator or continuation item selected, a Reset button appears to the right of the drop-down arrow. If you want to revert to Word's default for the displayed item, click Reset.

FIGURE 35-7

The notes pane can display a variety of different notes-related items.



Summary

In this chapter, you've seen the variety of options Word provides for inserting and managing footnotes and endnotes. You should now be able to do the following:

- Insert footnotes and endnotes
- Edit footnotes and endnotes
- Change the appearance of footnotes and endnotes by modifying their respective styles
- Control and set footnote and endnote numbering and location on the page
- Convert footnotes to endnotes and vice versa

CHAPTER 36

Citations and Bibliography

If you are constantly having to open a dozen or more documents so you can copy sources into the current document, reusing your bibliographic resources, Word provides a way to make things easier. Go ahead and open those documents, one last time. One last time because *this* time, you're going to add those sources to Word, and they'll always be available the next time you need them.

To develop this feature, folks from Microsoft spent countless hours interviewing undergraduate students, graduate students, professors, and researchers in a variety of disciplines to see how they work and what their needs are. The result is a set of citation and bibliography tools that can save many academic and professional writers a lot of time.

Note

To be honest, Word's bibliographic capabilities, while being just the ticket for high school students, most college students, and a number of professionals with modest needs, won't please everyone. Among the significant gaps is the lack of an Abstract field for storing document abstracts. If you have hundreds or even thousands of sources, it's unlikely that you will remember what each and every article and book are about. Moreover, if you need external library interfaces, you'll have to wait until Microsoft's SDK (software development kit) trickles out into the broader resource community and libraries begin to make their resources available using the tools that Microsoft has developed. At this writing, not a single searchable online library could be found. ■

If you are working on your Ph.D. dissertation or are otherwise engaged in heavy-duty research, you likely will want to reach beyond Word's capability to something such as RefWorks or EndNote, products used by many graduate students and researchers.

IN THIS CHAPTER

Creating a list of bibliography sources

Associating sources with a document

Citing sources in a document

Editing citations

Inserting and saving bibliographies

Sources

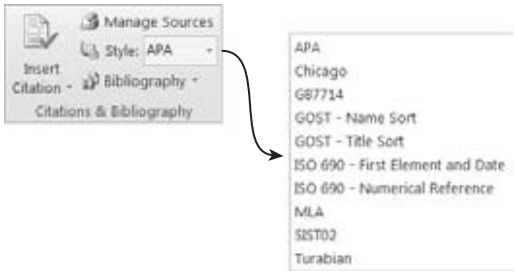
To be able to use citations in your Word documents, you need the bibliographic specs for each source you want to cite. Word's citation/bibliography feature has several methods for getting that information into your document:

- Insert a source from scratch using the Create Source dialog box. This inserts the source into your Master List as well as in your Current List. The Current List is just for the current document, and the Master List is all the sources you've ever created.
- Copy an existing source from the Master List to the Current List.
- Import sources you exchange with colleagues (or even set up a shared source list that you and colleagues can all access and contribute to).
- Search external online libraries using the Research and Reference pane. You can import data directly into the Master List in this way (once external libraries start using Microsoft's specifications).

The citation and bibliography features are available in the Citations & Bibliography group in the References ribbon, shown in Figure 36-1. You use the tools in this group to add sources, insert citations in the current document, initiate library searches, manage sources using the Manage Sources dialog box, choose the style for the references in the current document, and insert a bibliography into the current document.

FIGURE 36-1

Create, use, and manage bibliographic sources from the Citations & Bibliography group in the References ribbon.



Style First

Before you begin to insert citations, it is helpful to first choose the style you are using. This affects the way citations are inserted into the document. If you later need to change the style (for example, if an article or paper is being repurposed for a publisher that requires a different style), you can change styles on-the-fly. Because citations and bibliographies are inserted using field codes, when you change styles, all citations and bibliographical entries are reformatted to match the selected style.

To set the style, click the drop-down arrow next to Style in the Citations & Bibliography group in the References ribbon. As shown in Figure 36-1, Word has ten common styles from which to choose. Click to choose the style needed for the current document. If you've already inserted citations, they will automatically be reformatted to match the selected style.

Inserting Sources from Scratch

You have two ways to insert a source from scratch. You can use Insert Citation ➪ Add New Source, or you can use the New button from the Manage Sources dialog box. The former adds the source and inserts a standard citation. The latter adds the source, but does not immediately cite it.

Note

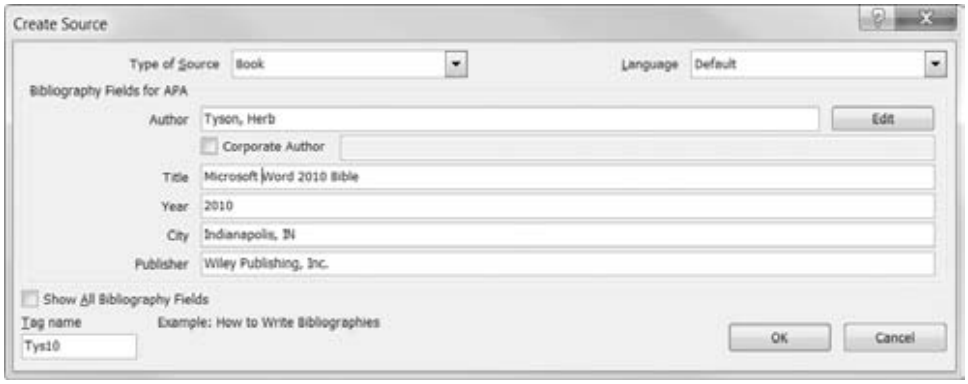
Word's Citations & Bibliography tools can create only parenthetical citations. The tools are not geared to creating footnotes or endnotes. If you need a footnote or endnote, go ahead and insert the parenthetical citation, cut it to the Clipboard, insert a footnote/endnote, and paste the Clipboard contents into place, deleting the parentheses. ■

Add New Source

To add a new source and cite it at the same time, choose Insert Citation ➪ Add New Source. This displays the Create Source dialog box, shown in Figure 36-2. Use Type of Source to indicate the nature of the source you are citing. This choice determines the fields available.

FIGURE 36-2

Use the Create Source dialog box to add a source to the Master List and Current List.



Tip

Key fields to keep in mind are Author, Title, Tag name, and Year. In the Source Manager, which you'll see shortly, you can sort sources by those fields, which makes them useful organizational resources. This might not matter when you have a dozen sources. When you have hundreds, however, it will matter. ■

For entering authors' names, you can type them as you ordinarily would — for example, Joseph Priestly, Samuel F. B. Morse, or Susan B. Anthony. After you click OK, they will be changed to last name first, for example, Priestly, Joseph; Morse, Samuel F. B.; and Anthony, Susan B. You can enter them as last name first as well. Word will "see" the comma and adjust as needed.

To enter multiple authors for a reference, separate them with semicolons. You can also use the Edit button, if you prefer, although many users find it somewhat clumsy. The easiest way to enter names is if you already have them available in another window. Copy them to the Clipboard and paste them using Ctrl+V or by right-clicking and choosing Paste. Note, however, that unlike many Windows textboxes, you cannot drag text into the Create Source dialog box's fields.

Click the checkbox next to Show All Bibliography Fields to display the full range of information you can enter. Unfortunately, this field does not "stick." Even if you always want this option enabled, you have to enable it each and every time you visit this dialog box.

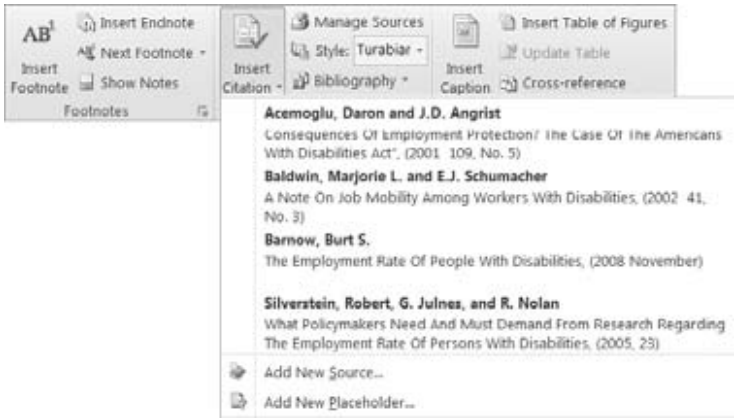
Note

The Create Source dialog box also indicates the current style. With Show All Bibliography Fields enabled, red asterisks appear next to fields, indicating that they are *recommended* for the selected style. Though the fields available for entry do not vary according to which style is selected, the presence of asterisks does change. Therefore, although it's not essential that you pick the style before creating a source, it is useful. Remember also that if you use the same source with a different style, different data elements might be emphasized. Therefore, as time permits, it pays to add as much information as possible when creating a source. ■

When you're done, click OK. Word does several things. Visibly, Word inserts the citation at the insertion point, including parentheses, using the selected bibliographic style (APA, Chicago, and so on). Less visibly, as shown in Figure 36-3, the added source is added to the Citation Gallery, and will be available the next time you choose Insert Citation from the References ribbon. At the same time, the source is added to both the Current List and the Master List in the Source Manager, which you'll learn about shortly.

FIGURE 36-3

As you add sources in the current document, they are listed in the Citation Gallery.



Citation Gallery

Unlike many other galleries in Word, the Citation Gallery lists only sources that are in the Current List. In other words, it lists only sources that are available for use in the current document. Otherwise, as you begin to add sources to it, the gallery would become hopelessly large, and finding sources in it would become increasingly difficult.

Citation Field Code

To create citations, Word inserts a citation field code. The Insert Field dialog box provides virtually no built-in support for inserting field codes using that approach. Therefore, you're better off using the Insert Citation tool in the References ribbon.

The syntax for the citation field is as follows:

```
{ CITATION tag [\s pages \n \y \t] \l language }
```

Example:

```
{ CITATION Cooper \s "p. 233" \n \y \t \l 1033 }
```

In the example, the tag name is Cooper. The citation will include `, p. 233`. The `\n`, `\y`, and `\t` switches are used to suppress the author's name, the year, and the title, respectively.

Note

The `CITATION` field inserted by the Insert Citation command is locked programmatically so that you cannot edit it by hand. Using Ctrl+Shift+F11 (Unlock Fields) will not unlock it. If you want to experiment with the `CITATION` field, you'll need to insert one using Insert ➪ Quick Parts ➪ Field, in the Insert ribbon, or press Ctrl+F9 to insert the field braces manually. See Chapter 21, "Field Guide," for additional field guidance. ■

Adding New Sources Using the Source Manager

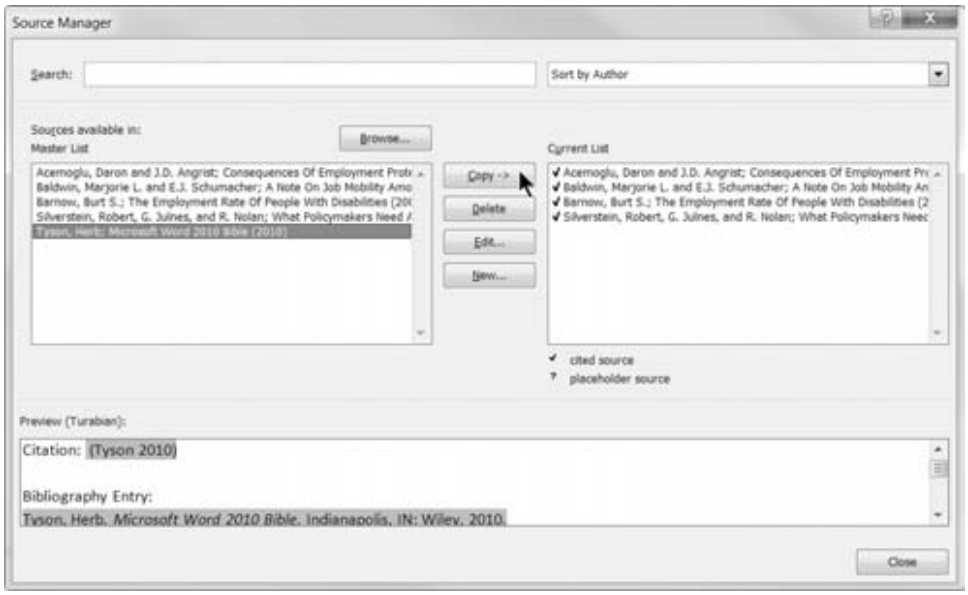
You can also add sources using the Source Manager. From the Citations & Bibliography group in the References ribbon, click Manage Sources to display the dialog box shown in Figure 36-4. Click New to add a source. This opens the same Create Source dialog box shown in Figure36-2. Once you add the new source, it now shows up in the Source Manager (Current and Master Lists) as well as in the Citation Gallery. It does not yet get inserted as a citation in the current document, however. Once the source has been added to the Current List, you can then choose Insert Citation from the Citations & Bibliography section of the References ribbon, and click the source in the Citation Gallery. Note that you are not yet finished with the Source Manager. You will return to it several more times in this chapter.

Using Existing Citations

In addition to creating citations from scratch, as shown in the preceding section, you can use existing citations. As noted previously and shown in Figure 36-3, once you have created a source — either directly using Insert Citation ➪ Add New Source, or by clicking the New button in the Source Manager — that source is added to the Citation Gallery. Once it's in the Citation Gallery, simply choose Insert Citation from the References ribbon, and click the source to insert the citation at the insertion point.

FIGURE 36-4

Use the Source Manager to create new sources as well as copy sources between the Master and Current Lists, among other things.



If a source exists in your Master List but not yet in the Current List, you can use the Source Manager to copy it. In the References ribbon, click Manage Sources to display the dialog box shown in Figure 36-4. In the Master List, click the sources you want to copy. Use normal Windows techniques for selecting multiple items from the list. Notice that the arrow by Copy now points toward the Current List. Click Copy to add the selected items to the Current list, and then click Close.

Before you can cite a source, it has to exist in the list of sources for the current document. You can add sources to Word in several ways. Once sources have been associated with the current document, they appear in the Citation Gallery (refer to Figure 36-3). To insert a citation for the source, move the insertion point to where you want it to appear, and then choose Insert Citation and click the source.

Placeholders

When writing, if you stop to insert a citation, it often interrupts your train of thought. It's often more creatively efficient to insert a temporary placeholder, and then come back to it later. To insert a placeholder citation, choose Insert Citation ➪ Add New Placeholder. In the box provided, shown in Figure 36-5, type a name for the placeholder and click OK. Placeholder names have some silly rules — the same rules used for bookmark names. Names can include letters

(including accented letters), numbers, and the underscore character. That's it. No dashes, no spaces. Names are case sensitive (for example, Cooper, COOPER, and cooper are different placeholder names), so be careful with that Shift key.

FIGURE 36-5

Remind yourself to find a citation later, and then continue writing.



When you create a placeholder, Word doesn't add it to the Master List (although you can add placeholders using the Source Manager), but it does get added to the Citation Gallery.

Edit Source (and Convert Placeholder to Source)

If information about a source changes, or if you simply get new information, as happens when you are converting placeholders into ready-to-use sources, it is easy to edit the source. When you need to update the information about a source (or to convert the placeholder into an actual source), you have several ways to proceed:

- Right-click any occurrence of the citation in the document and choose Edit Source.
- Click the drop-down arrow at the right end of the citation container and choose Edit Source.
- Open the Source Manager, select the source or placeholder, and choose Edit.

However you proceed, you'll see the Edit Source dialog box shown in Figure 36-6 (you might not have the Language option if you use a single language). Add the source information as described earlier in "Add New Source," and click OK. When you do this, all citations in the current document are updated.

If the identical source (identified by Tag name) is included in both the Master List and the Current List, you will be prompted about which lists should be updated, as shown in Figure 36-7. Say No if you want to update only the list associated with the method you used to access the Edit Source process. If you accessed Edit Source by using a citation in the document and now click No, only the Current List version of the source will be updated. If, on the other hand, you selected the source in the Master List from the Source Manager and clicked Edit, clicking No will update only the Master List version of the source.

FIGURE 36-6

When you edit a source, all citations in the document are updated.

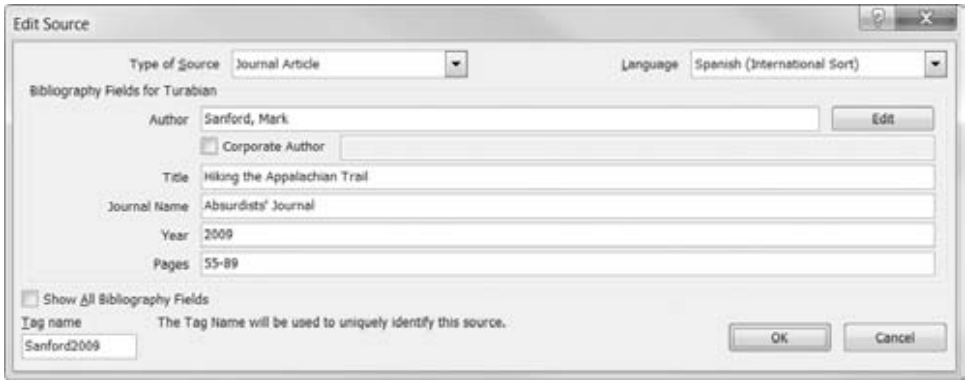
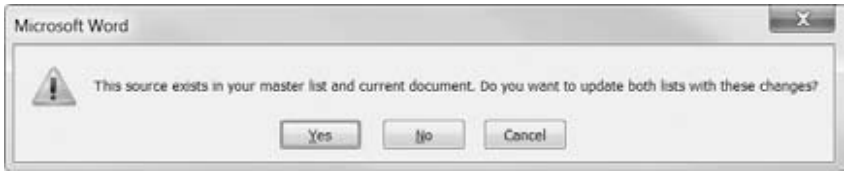


FIGURE 36-7

Click Yes to update both the Master List and the Current List. Click No to update just the Master List.



When and why might the two lists differ? The two versions of the source might be different, for example, if the Master List includes a whole book, while the Current List item includes only one chapter.

Editing Citations

You might have noticed that when you insert a citation, you aren't provided with any options. A minimal citation is inserted based on the selected style. Suppose, for example, that you're using the same citation in different parts of a paper, and want to focus the reader's attention only on certain pages of a particular book or article. You could handle this by creating different sources, but that tends to make the list of sources rather unwieldy and confusing later. A better way is to edit the citation to add the additional information.

To edit a citation, right-click the citation or click the citation container's drop-down arrow and choose Edit Citation. In the Edit Citation dialog box, shown in Figure 36-8, type the page number, or click to check citation details you might want suppressed. Note that when adding page

numbers, Word does not supply the p. or pp. in the resulting citation. You'll need to provide those yourself.

Note

When you edit a citation in this way, you're probably wondering what happens later when/if you edit the source. Because of the way that the edits are added — using field switches — the main citation itself can be updated independently of the edit. Hence, if you later edit the source, the citation will be updated, but any additional information provided or suppressed through editing is preserved. ■

FIGURE 36-8

Edit the citation to provide page numbers or to suppress Author, Year, or Title.



Deleting Sources

Ordinarily, you probably won't need to delete sources from your Master List. Most collectors tend to keep resources they've acquired. However, if you acquire source lists from other people or over the Internet, you sometimes will discover that you have slightly different versions of the same source, with one being slightly more complete than the other or each having details that the other lacks. There is no built-in way to consolidate such "duplicates" into a single item that uses information from all available sources. Given that the quality of the information might vary as well as the quantity of information, it's not even clear that you would *want* Word making such decisions about which source to believe.

Therefore, you would need to sort through the information manually by inspecting the different sources, copying missing details to the pick of the litter, and then deleting the inferior versions. When you're ready to delete a source, choose Manage Sources, click the source(s) you want to zap, and then click Delete.

Note that you can delete from the Master List as well as from the Current List. You might want to delete from the Current List if you discover you have duplicates with different tag names. You might also want to delete from the Current List if you decide not to use a given source. Keep in mind, however, that Word is capable of distinguishing between sources consulted and sources cited (see "Inserting a Bibliography"), so don't delete sources you consulted but didn't cite. The fact that you consulted a source might ultimately prove useful, even if you don't include it in the list of sources cited that you include with the finished document.

Acquiring External Sources

As suggested earlier, you're not limited to sources that you develop and enter. You can exchange source lists with colleagues, download sources from libraries that adopt Word 2010's bibliographic standard, as well as establish source lists on local/organizational servers.

The process for actually getting external sources to "stay" in Word is unintuitive and a bit tricky. With a little bit of patience, however, it can be done. To load an external list of sources into Word, in the References ribbon, click Manage Sources ➪ Browse. The Open Source List initially opens in the `C:\Users\user\AppData\Roaming\Microsoft\Bibliography` folder.

If you've created any sources, you should see a file named `Sources.xml`. Ordinarily, Word users would expect that additional source files copied to this folder would automatically be loaded by Word. Not this time. Word automatically loads only the `Sources.xml` file, so if you copied a file here expecting it to be automatically adopted by Word, click it, and then click Open. Or, if your list of sources resides elsewhere, navigate to it, and then click Open.

Back in the Source Manager, your added sources now display in the Master List. They're not there to stay, however. That's because they're just guests at the moment. When you close and reopen Word, the guests will have left. To get them to stay, you have to adopt them.

To adopt them, do the following:

1. Open a new blank Word document. Use the Source Manager to copy the "guest" sources from the Master List into the Current List. They should now be listed in both places.
2. Click Close to close the Source Manager.
3. Save and close the Word document that now has the "guest" sources associated with it.
4. Close Word.
5. Open Word and reopen the Word document into which you copied the sources. Click Manage Sources and verify that they're still there in the Current List. They should be missing from the Master List at this point. If they aren't missing, then stop. You're done.
6. In the Current List, select the sources and click Copy. Close the Source Manager.
7. Save and close the file, and close Word again. When you reopen Word, the Source Manager should now include those pesky sources. Check with the IRS, however, before declaring them as dependents.

Bibliography

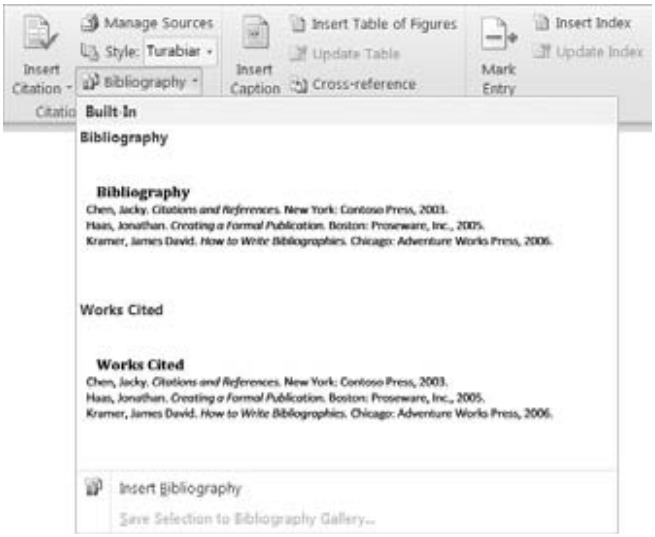
Bibliographies, like citations themselves, are inserted using field codes. Though Word lets you choose between a *sources consulted* and a *sources cited* list, it does not support both at the same time when you use the gallery to insert the bibliography. Therefore, you have to either choose one or the other or insert one from the gallery and the other using the Insert Bibliography command (or just use the field code directly). We'll look at that in a moment.

Inserting a Bibliography

To insert a bibliography, click the Bibliography drop-down arrow in the References ribbon. Word offers the bibliography gallery alternatives shown in Figure 36-9, plus one more, which is scrolled out of view in this picture.

FIGURE 36-9

Word offers several bibliography alternatives in the bibliography gallery.



- **Bibliography:** Inserts Bibliography as the title, and then lists of all sources associated with the document, whether cited or not.
- **Works Cited:** Inserts Bibliography as the title, and then lists of all sources cited in the document.

In addition to the gallery items, you can choose Insert Bibliography. This option inserts a list of works cited, and does not include a title or a page break.

Managing Bibliographies

Ordinarily, there should never be a need to edit or update a bibliography inserted using Word 2010's Citations & Bibliography commands. When you add sources and/or cite them, any bibliographies are updated automatically. The only time you might *need* to update a bibliography would be if you need to fix an accidental edit.

If you need to have both *works consulted* and *works cited* lists in your document, the easiest way is to insert one of the items from the bibliography gallery, and use the Bibliography ➪ Insert Bibliography command to insert the sources cited list. You can manually provide a title for the latter.

Deleting

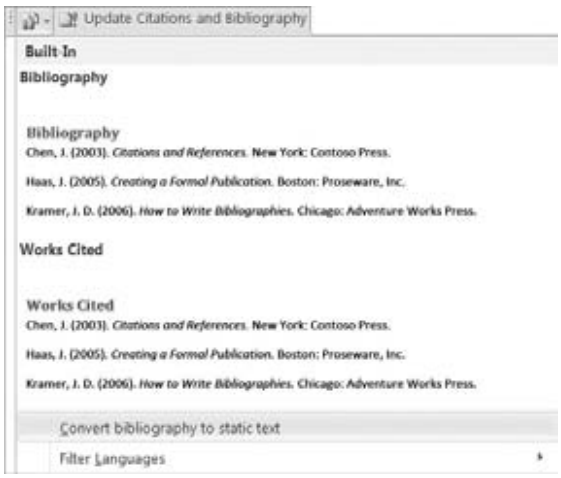
To delete a bibliography, click the content control handle (upper left), and press the Delete or Backspace key. If only part of the bibliography field is selected, the text will be deleted. However, the next time any citation or source change occurs in the document, the edit will be undone. If you want to perform manual edits to a bibliography and have the edits survive updates, you would need to convert the bibliography into static text.

Converting a Bibliography into Static Text

To convert a bibliography into static text, click the drop-down arrow at the end of the content control container and choose Convert bibliography to static text, as shown in Figure 36-10.

FIGURE 36-10

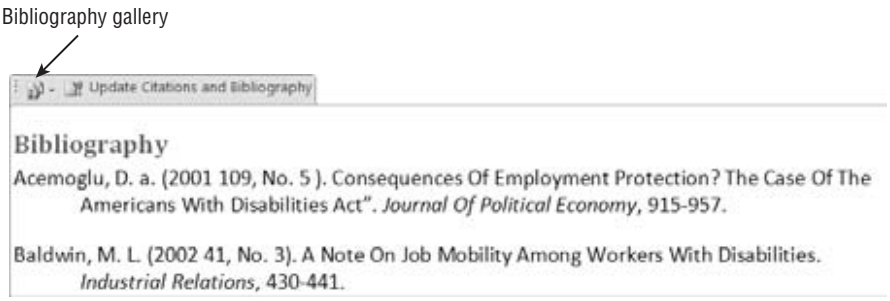
To copy a bibliography elsewhere, convert it to static text. (Filter Languages appears only if you have multiple languages installed on your computer.)



Note that once you convert the bibliography into static text, that does not completely divorce it from the process. For one thing, the static text version of the bibliography is still within the content control container. For another, note the control at the upper-left corner of the container, shown in Figure 36-11. If you click the drop-down arrow there, you will see the Bibliography Gallery options. If you choose one, the static bibliography is replaced with the corresponding bibliography field from the gallery.

FIGURE 36-11

Even after being converted into static text, a bibliography is still connected to the citation process.



If you really want to remove a bibliography from the whole citation process, after unlinking it, copy the contents of the field to the Clipboard, making sure that no part of the container is selected. Then, paste it somewhere outside of the container, and delete the container.

Save Selection to Bibliography Gallery

You can save a bibliography for future use, and it will appear in the Bibliography Gallery along with the built-in items. To do this, select the bibliography and any formatting or other text (including page breaks, section breaks, and so on), and choose Bibliography ➪ Save Selection to Bibliography Gallery. The bibliography can be a field or static text.

If the bibliography is saved as a field, only its formatting will be used, not any source content. For example, the four built-in gallery items determine only two factors:

- Whether the bibliography will contain all sources in the Current List or only sources cited
- Whether the bibliography will be followed by a page break

If you determine that you need a title, a section break, special formatting, and so on, you can include it in gallery items you save. When you insert that gallery item, it will then determine how the Current List items in any given document will appear. It won't display the sources that were in the bibliography used to create the gallery item.

You can, however, convert a gallery to static text before saving it to the gallery. When you do that, the bibliography itself (along with title, formatting, text, and so on) is saved. When you insert the resulting gallery item, the actual sources themselves will appear, even if they aren't cited or otherwise sourced in the document in which they are inserted.

Summary

In this chapter, you've learned about Word 2010's citations and bibliography tools. You should now be able to do the following:

- Use the Style tool to apply a variety of different bibliography styles (APA, Chicago, and so on) to an article or paper
- Insert properly formatted parenthetical citations to sources used in a research paper
- Import sources from other source lists
- Insert a bibliography that contains all sources consulted or sources cited
- Reuse and repurpose sources in a variety of different documents

CHAPTER 37

Captions and Tables of Captioned Items

Captions are snippets of text that number and identify pictures, equations, tables, charts, and other items in your document. Word can automatically insert captions for you, automatically numbering such items as they are inserted. By being systematic in how you insert captions in your documents, creating a table of figures, equations, or tables (for example) is a snap, as is numbering them. If you insert or remove a numbered item, Word can automatically renumber all of the items that follow. It's simply a matter of proceeding in an orderly fashion.

IN THIS CHAPTER

- Inserting captions manually
- Automatic captions
- Custom caption labels
- How caption numbering is done
- Copying and deleting captioned figures

Caption Basics

Captions are residents of the Captions group in the ribbon's References tab, shown in Figure 37-1. Other tools in this group include Insert Table of Figures, Update Table, and Cross-reference. Note that "Table of Figures" is a generic label. In your mind, substitute "whatever things I want a table of" for the word *Figures*. In other words, it can be a table of equations, a table of tables, a table of widgets, or even a table of chairs, although that might be silly.

Strictly speaking, the Cross-reference tool in the Captions group is not just about captions. While you can use it to refer to captioned items, you can use it to refer to just about anything else as well. With respect to captions, use it to insert references like "See Figure 3." Why would you use a special feature for this rather than just type that text? Sometimes figures are moved, added, or removed. What referred to Figure 3 this morning might refer to Figure 17 this afternoon. By using Word's captioning and cross-referencing features, when figures, references to them, and text are shuffled around in a document, their respective numbers remain correct, automatically updating, incrementing, or decrementing as needed.

FIGURE 37-1

Caption matters are controlled mostly from the Captions group.

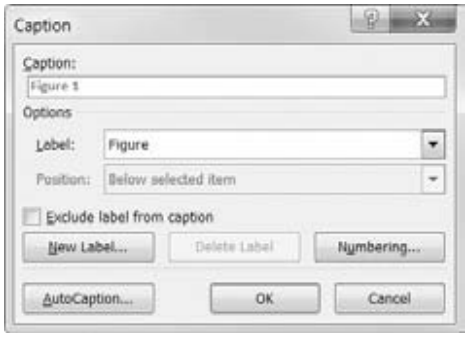


Insert Caption

To insert a caption, choose Insert Caption in the Captions group in the References ribbon. As shown in Figure 37-2, the Caption dialog box appears. You can use the Caption dialog box to insert a caption, to set up a new caption label, to set up caption numbering, or to set up automatic captioning (for a limited number of object types).

FIGURE 37-2

The Caption dialog box isn't just for inserting a caption right now. When you make other changes, Cancel changes into Close; click Close to close the dialog box without inserting a caption.



If an object of some kind is selected, the Position option is available, enabling you to choose Below selected item or Above selected item. No matter what kind of object is selected, Word will always propose the most recently chosen Label, defaulting to Figure if this is your first visit. A proposed numbering scheme is also at the ready, defaulting to the ever-popular 1, 2, 3. If everything is just the way you want it, click OK to insert the caption. Standard practice is to add a period and space following the caption label and number, along with some text describing something about the captioned item.

Note

A caption usually consists of more than just the label and number. As demonstrated in the book you're reading, captions also exist to tell the reader what they're looking at. If a picture is worth a thousand words, then use at least a few of those words to tell the reader what they're looking at so they'll know why it's

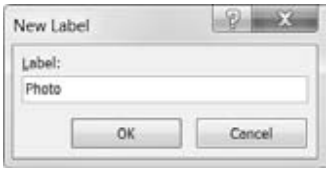
there. Otherwise, it might simply look like a random picture (although, come to think of it, it might be kind of fun to include random unidentified pictures in an otherwise boring report). In case you're wondering, caption length is limited: You can include 253 characters in addition to the caption label and number. ■

Labels

If the Figure caption *label* isn't correct, use the drop-down arrow at the right end of the Label control. By default, Word offers three label options: equation, figure, and table. You are not limited to those three. To add labels of your own, click New Label. In the New Label dialog box, shown in Figure 37-3, type a name for the label you want to create and click OK or press Enter. Label naming is generously liberal. There are no restrictions on what you can type. Type something useful for the context of your document and click OK.

FIGURE 37-3

Label names can be whatever you want them to be: Photo, Picture, Chart, Graph, Snapshot — you name it. Literally.



Labels you create are remembered by Word across multiple sessions. The next time you open Word and click Insert Caption, Word offers the last label you used, and offers any you've created in its drop-down label stable. For example, if you've used Widget, Picture, and Diagram, Word will offer those in addition to the default three. If you really believed the preceding paragraph's assertion that there are no restrictions on label names and typed something embarrassing, select that label and click Delete Label. If someone else uses your computer, however, it's sometimes fun to anticipate their visits by creating a special welcoming label . . . something nice like *Hi, Mabel!*

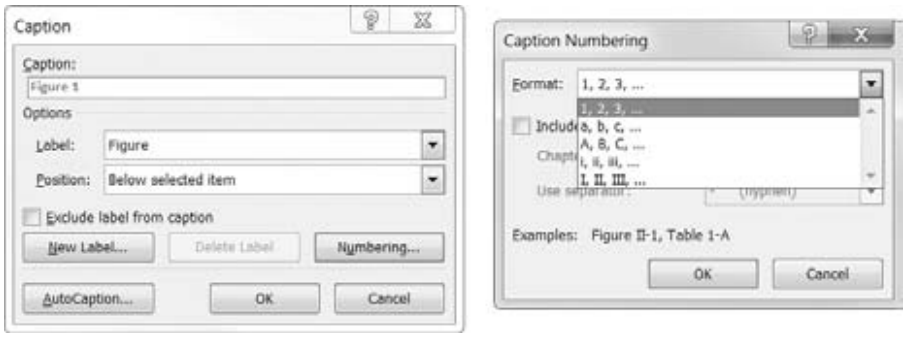
Numbering

By default, Word numbers captions using 1, 2, 3. If that scheme doesn't meet your needs, click Numbering to display the Caption Numbering dialog box shown in Figure 37-4. Use the Format drop-down list to see if one of the five numbering options offers what you want. If not, too bad, because this is the entire menu. However, if you're feeling peevish, jump ahead to "How Numbering Is Done" to find some fresh alternatives.

Word will also automatically include a "chapter" number along with the caption number. For example, it might say *Figure 37-4*. The "chapter" number need not be a chapter at all. It can be whatever's associated with the particular numbered Heading level you choose. For a separator between the chapter and caption number, choose from among the following: hyphen, period, colon, em dash, or en dash.

FIGURE 37-4

Word offers five numbering plans and will automatically add the current number associated with any Heading level style.



How Numbering Is Done

Caption numbers are inserted using a SEQ field, SEQ identifier, where the selected label is used as the *identifier*, for example, SEQ figure, SEQ equation, SEQ table, SEQ AndYeShallFind, and so on. If you choose the Include Chapter Number option, which is partially obscured in Figure 37-4, the chapter number is inserted by using a `STYLEREF` field. For example, with field codes showing (Alt+F9), a typical caption might appear as follows:

```
Figure { STYLEREF 1 \s }- { SEQ Figure \* ARABIC \s 1 }
```

If you read Chapter 21 then you understand the implications of this. Whereas the Caption Numbering dialog box offers only five numbering options, Word itself offers many more. If you replace ARABIC with CARDTEXT, for example, this might now read as Figure 34-one. That might look silly, but it demonstrates the point that with a little bit of intervention, you can achieve almost any kind of numbering scheme you want. The price, of course, is the loss of a certain amount of automation.

If You Don't Want Numbers

You probably noticed that *None* is not one of the numbering options. Excluding numbers from your captions is easy, however. To insert an unnumbered caption, position the insertion point where you want it to appear and apply the Caption style. Type the caption label you want to use. In other words, if you don't want numbered captions, you don't need the caption feature. The whole idea of using the caption feature is to coordinate and automate the process of numbering the dang things. If you don't want numbered captions, then this feature has nothing to offer you.

Look Ma! No Label!

If you have only one type of figure (or whatever) in your document, and want to exclude the label, you can. In Figure 37-2, click to place a check next to Exclude label from caption. Why would you want to do this? That's a private matter between you and your document.

The Caption Style

As hinted earlier, Word provides a caption-oriented style named Caption. It is a paragraph style, and it is applied to the entire paragraph. There is no way to change the style that Word applies to captions inserted using the caption feature. You can, however, modify the Caption style. With a caption selected, press Ctrl+Shift+S and choose Modify. Modify the style as shown in Chapter 9.

Note that by default the Caption style is color-coordinated with the current theme. This is accomplished by assigning the Accent 1 theme color to the Caption style. Keep this in mind if your caption text suddenly changes color when you apply a new theme. For more about themes, see Chapter 31.

AutoCaptioning

You can also instruct Word to automatically insert captions when you insert particular kinds of graphics and other objects. If you have a lot of installed applications with object types that Word recognizes, it can be a little daunting, however, trying to figure out what's what.

Note

At this writing, auto-captioning works for Word tables, but little else that's of much use. Broken in Word 2007, it continues to be broken in Word 2010. So, when you look at the daunting list of things for which it can be enabled, don't despair. The actual list of things that work is much shorter: Microsoft Equation 3 (the Word 2003 version), Word tables, MapPoint maps, and Microsoft Graph 3 (the Word 2003 version), and perhaps a few others. It does not work for SmartArt, pictures, WordArt, charts, or a vast majority of other object types. ■

Turning on AutoCaptioning

AutoCaptioning must be enabled for the specific objects for which you want to use it. To enable it, in the References tab, choose Insert Caption ➪ AutoCaption to display the AutoCaption dialog box, shown in Figure 37-5. Use the label shown or click the drop-down arrow to use a different one, or click New Label to add a new label to the list of labels you use. Choose the desired positioning and numbering, and then click OK. Word will now use those settings for all objects of the specified type.

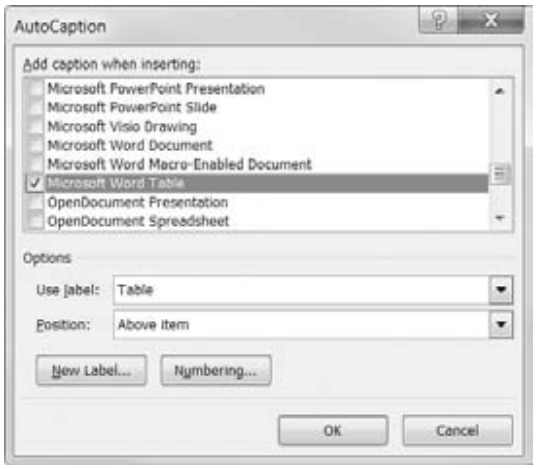
Note

If you insert a table by pasting one from the Clipboard, AutoCaption will insert a caption only if the Clipboard contains just a table. If the Clipboard contains additional text or other objects, AutoCaption is suppressed. Inserting a table from the Quick Parts Gallery or the Building Blocks Gallery also does not insert an AutoCaption. If you want either of those to contain a caption, you should save a caption with the table when you save it as a Building Block or a Quick Part.

In addition, AutoCaption doesn't work for every kind of object. If the object type you seek isn't listed, you'll have to continue manually inserting captions for that type. ■

FIGURE 37-5

AutoCaption must be enabled for each specific type of object you want captioned.



Tables of Captioned Items

Word can insert a table of captioned items that appear in the document. Word bases the table on caption labels. Hence, if you have used the Figure label for different kinds of things, they will all be listed. That's why it's important to make the distinction when captions are inserted, rather than when the table is inserted.

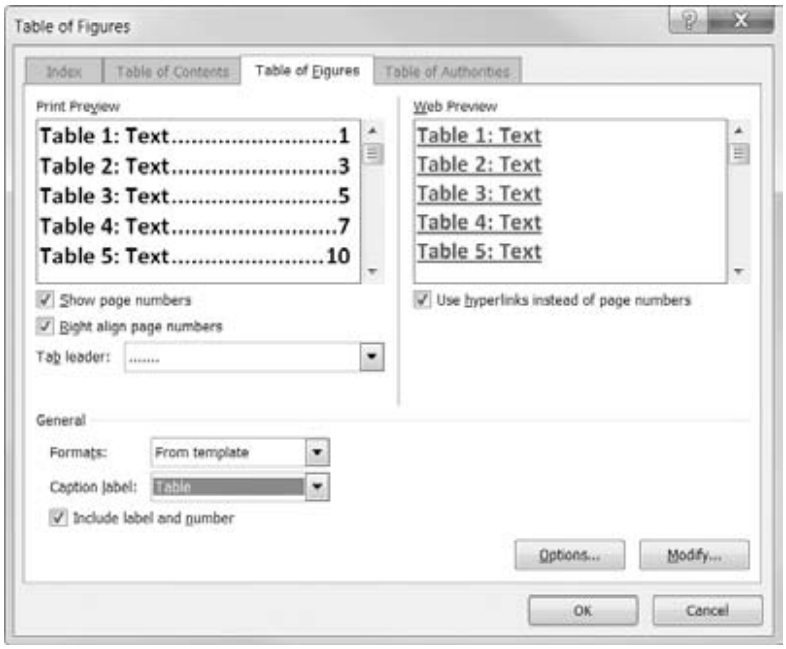
To insert a table of figures, a table of tables, and so on, in the References ribbon, choose Insert Table of Figures. As you can see in the Table of Figures dialog box shown in Figure 37-6, even though it says Table of Figures, clearly, it can be used to insert a table of tables as well.

Notice that the Table of Figures dialog box actually is a tab within a larger dialog box, not unlike the Table of Contents dialog box discussed in Chapter 33. Options are as follows:

- Show page numbers
- Right align page numbers
- Separate table of contents heading text from numbers using . . . leaders
- Use TOC style formatting from the current template
- Use hyperlinks instead of page numbers in Web Layout view
- Caption label
- Include label and number

FIGURE 37-6

Insert Table of Figures means ''figures'' in a generic sense, and can be used to insert a table of any type of captioned item.



In addition to the setting discussed in Chapter 33, use the Caption label to tell Word what kind of table to create. If you want the label and number, leave the check next to Include label and number. Otherwise, the table will include just the text of the caption without the label and number.

Options

For additional options, shown in Figure 37-7, click the Options button in the Table of Figures dialog box. By default, Word builds the table based on occurrences of the selected label formatted with the Caption style. If you haven't used the Caption style but used styles named Normal or Table of Figures instead, click the drop-down arrow to the right of the Style box.

In addition to or instead of basing a table of figures on the presence of a given label formatted with a given style, you can build a table of figures based on the presence of table entry fields. Recall that in Chapter 33 you learned that Word defaults to a table identifier of C for the table of contents. For the table of figures, it defaults to a table identifier of F.

Now, as then, it doesn't really matter what the identifier is as long as what you choose here agrees with the identifier used for the table entries. To create table entries manually, see "Manually Adding Selected Text" in Chapter 33. Instead of using the C identifier, however, use the same identifier letter you specify here.

FIGURE 37-7

You can base a table of figures on different styles or on table entry fields.



Copying and Deleting Captions

When you insert captions using AutoCaption or the Insert Caption command, Word automatically updates all of the relevant numbering fields for other captions in that series. If you move tables, figures, and so on around, or delete them manually, however — using copy, cut, and paste — the numbers are not automatically updated. Assuming you don't have unrelated field-based numbering systems that you *don't* want updated, you can update the captioned items by pressing Ctrl+A to select all of the text in the document and pressing F9. You can also update caption numbering fields individually either by selecting each and pressing F9 or by right-clicking the selection and choosing Update Fields.

Summary

In this chapter, you've seen how to insert captions manually as well as how to automatically insert captions when specific types of graphics or other objects are inserted into Word. You should now be able to do the following:

- Create new labels for captioning a variety of different kinds of objects
- Edit a caption number's field code to change the numbering style
- Insert a table of figures, tables, and so on, using caption labels
- Insert a table of tables, figures, and so on, using table entry fields

CHAPTER 38

Indexing

For paper books, especially reference books, the index is the key to whether readers will find the book useful as a reference. Word enables you to create indexes (or indices, if you prefer) in a variety of different formats and styles. For online documents, indexes are less important because readers are able to search for what they're looking for. Even there, however, an index can help steer readers to more substantive discussions, as opposed to incidental mentions of a given topic or keyword.

Unlike tables of contents and figures, the indexing process can't be fully automated, although there are some things you can do as you're writing to make things easier. We look at some of those in this chapter, along with how you set up a document for indexing and how you insert an index.

As a feature set, indexing lives in the Index section of the References ribbon, as shown in Figure 38-1. Tools provided there are as follows:

- **Mark Entry:** Use to mark locations in the text you want indexed, as well as to specify how each location is treated.
- **Insert Index:** Use to insert and format an index.
- **Update Index:** Updates the index. This command is available only when the insertion point is located somewhere within an index.

Indexing is a two-step process:

1. Create the index entries — places in the text you want indexed, as well as categories and subentries — by marking text for indexing.
2. Compile and format the index.

IN THIS CHAPTER

Marking index entries

Creating index subentries

Automatically marking index entries using a concordance file

Compiling an index

Decrypting the INDEX field

FIGURE 38-1

In the References ribbon, use the Index group to mark items for including in the index as well as to insert and update indexes.



Marking Index Entries

You mark index entries by inserting an index entry field (XE). You can do this in three ways:

- Use the Mark Entry tool from the References ribbon.
- Use the Mark All tool from the Index dialog box.
- Insert an XE field directly either manually or by using Insert Field.

This section describes how to use the Index tools in the References ribbon. See "Index Field Code" later in this chapter, and Chapter 21, for more information on fields.

Creating Index Entries Using Mark Entry

Index entries are items you want in the index. For example, if you were to go about indexing a mention of the word *table*, you might simply include that word in the index. Or, if tables were mentioned frequently in the book, and in a variety of contexts, you would probably want to have a *main* index entry for tables, along with *subentries* about each of the different kinds of tables. You might also have additional subentries about formatting, styles, rows, columns, cells, and properties. Examples of an entry and subentries are shown in Figure 38-2.

To create an index entry and/or subentry:

1. Select the text you want indexed, or click at the beginning of the section you want indexed. This ultimately will insert a tag into the text that will move with that location if text is added or removed before the entry location. This enables the index to refer to the correct page even if the document is heavily edited, as long as the index entry itself is not deleted. Note that selected text will always go into the Main entry box. There is no built-in way to make selected text go into the subentry field.
2. Press Alt+Shift+X (alternatively, click Mark Entry in the Index section of the References ribbon, or click Mark Entry from the Insert Index dialog box). This displays the Mark Index Entry dialog box, shown in Figure 38-3. This dialog box is nonmodal and can be kept onscreen as you navigate, so you can mark multiple items without having to dismiss and resummon the dialog box.

FIGURE 38-2

Use subentries to provide detail when a topic is covered extensively.

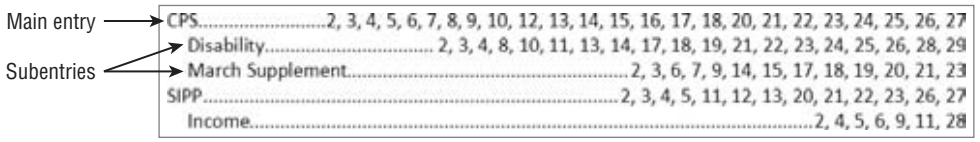


FIGURE 38-3

Use the Mark Index Entry dialog box to create index main entries and subentries.



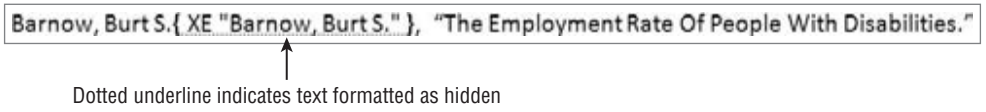
3. If text is selected, it will automatically be displayed in the Main entry field. Otherwise, type the desired index entry. Word will use the capitalization and formatting you supply. Use character formatting shortcut keys to format the textboxes (Main entry, Subentry, and Cross-reference) as you want them to appear in the index. For example, select text in the dialog box text fields and press Ctrl+I, Ctrl+B, Ctrl+U, Ctrl+Shift+D, and so on. See Table 7-1 in Chapter 7 for a list of additional shortcut keys, many of which work in the Mark Index Entry dialog box's text fields.
4. If desired, include a Subentry. This will become a category within the Main entry, as shown in Figure 38-2. See the section "Subentries and Styles" later in this chapter.
5. If desired, select Bold or Italic for the Page number format. In some publications, key entries are formatted differently (for example, where a concept is defined or introduced) so they can be found more readily.
6. To refer to another entry, choose Cross-reference and supply the text needed.

7. To specify a page range rather than a single page, bookmark the range of pages, choose Bookmark in the Mark Index Entry dialog box, and use the drop-down arrow to indicate which bookmark to use. This is helpful in situations such as Figure 38-2, where the CPS entry lists a number of pages in close proximity. At the very least, pages 2–10, 12–18, and 20–27 should have been specified as ranges, saving space and saving the reader time.
8. Click Mark to insert an index entry field either at the insertion point or next to the text that was selected. If you want to mark every instance of text matching the Main entry (whether it is selected or not), click Mark All.

When you click Mark or Mark All, the Mark Index Entry dialog box remains onscreen. An XE field is inserted as hidden text into the document. If hidden text is showing, XE fields always display as field codes. They never collapse into field results. This enables them to be conspicuous, as shown in Figure 38-4, and less subject to accidental deletion. When proofing or reading a finished document, they can be distracting, however. Toggle hidden text and other formatting marks on/off using Ctrtl+Shift+8 if you find glaring XE fields distracting.

FIGURE 38-4

Index entry (XE) fields are inserted as hidden text, which can be toggled on/off using Ctrl+Shift+8.



Tip

Because the Mark Index Entry dialog box is nonmodal, you can move readily between it and the text area. If you select text in the document, when you click back in the Mark Index Entry dialog box, the selected text is automatically copied to the Main entry field. ■

Automatically Marking Index Entries Using AutoMark

If you have a really long document with numerous entries, marking them manually can prove tedious. A simple solution is to create a list of words (called a *concordance file*) you want indexed, and use the AutoMark feature to insert the XE entries for you.

To do this, you first create the concordance file using Word. A concordance file should contain only a two-column table. The first column contains the text you want indexed, using the exact capitalization, punctuation, and formatting you want to appear in the index. The second column contains the XE field you want used. When you run the AutoMark command, Word finds each occurrence of every word or phrase in the list, and inserts the XE field from the second column. The concordance file is saved in Word format, and conceivably looks as shown in Figure 38-5.

Notice that Figure 38-5 does not show any subentries. That's because subentries do not work when applied using a concordance file. If you attempt to use subentries, separated by colons, only the right-most category will be included in the resulting XE fields.

To run AutoMark (the Word procedure that uses the concordance file), click Insert Index from the References ribbon, and then click AutoMark. In the Open Index AutoMark File dialog box, navigate to the concordance file, select it, and click Open.

FIGURE 38-5

Use a concordance table to automatically insert index entry (XE) fields into your document.

prohibit	{xe "prohibit"}
concurrent	{xe "concurrent"}
compensation	{xe " compensation"}
disabled	{xe " disabled"}
retirees	{xe "retirement"}

Note

If you get the message shown in Figure 38-6, it usually means that no instances of the words in the first column of the concordance file match anything in the document. It can also mean that the concordance file is defective in some way, often meaning that it contains something other than the expected table with XE fields. ■

FIGURE 38-6

You'll see this message when the wrong concordance file is applied or when the file isn't really a concordance file at all.



Compiling or Inserting an Index

Compiling an index means collecting all of the XE entries and putting them into the form of an index. Once the XE entries have been inserted using the methods described earlier in this chapter, move to where you want the index inserted, perhaps setting it off with a section break (Page Layout ribbon ➪ Breaks ➪ Next Page). From the References ribbon, choose Insert Index, which displays the dialog box shown in Figure 38-7.

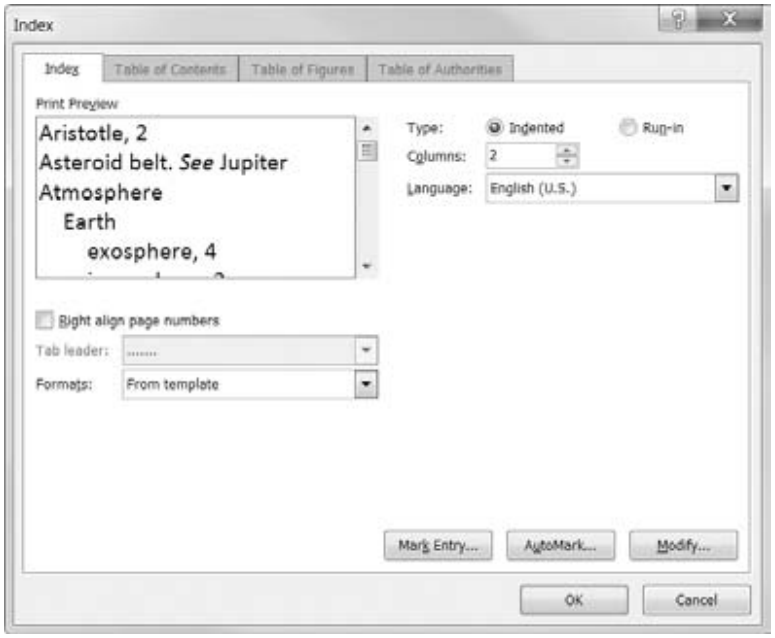
In addition to Mark Entry and AutoMark, which we've already looked at, the Index dialog box features the following:

- **Print Preview:** This shows an approximate preview of the finished index using the current settings.
- **Right align page numbers:** Moves page numbers to the far right. With indexes, this sometimes makes it difficult to associate entries and page numbers, even with leaders. Unless you're using narrow columns of text, right-aligned is usually not a good choice.

- **Tab leader:** When right-aligning page numbers, specify a leader to help the reader connect the dots between the index entry and the page number.
- **Formats:** Choose the From template option to use Index 1 through Index 9 styles defined in the current template, or choose one of the six preset options available through the Formats drop-down control.
- **Type:** Indented or Run-in. Subentry levels can be indented or presented in the same line as the main entry (assuming there's room). The former usually results in a neater and more organized appearance. The latter usually results in a more compact index that's sometimes easier for readers to follow, because all of the entry/subentry category information is presented in one place, eliminating the need to visually backtrack to figure out where a given entry originated.
- **Columns:** Word can organize the index into snaking columns. Narrower columns, as long as entries are fairly terse, often are easier to follow, and use paper more wisely. You can specify up to four columns.
- **Language:** If you have indexes in multiple languages, be sure to associate the correct language with each for proper proofing.
- **Modify:** Use this option to modify built-in Index 1–9 styles when Formats is set to From template. See "Subentries and Styles," a little later in this chapter.

FIGURE 38-7

Use the Index dialog box to launch Mark Entry or AutoMark, to modify index styles, or to format and insert an index.



Make your choices and click OK to compile the index. Word responds by inserting an INDEX field in the document, using switches corresponding to the options selected in the Index dialog box.

Index Field Code

Unlike index entry fields, the INDEX field itself does display a field result. With field codes displayed, a typical run-in index field might appear as follows:

```
{ INDEX \r \h " " \c "2" \z "1033" }
```

To see what the switches mean, choose Insert ➪ Quick Parts ➪ Field. Set Field Names to Index, click Field Codes in the bottom-left corner, and then click Options, shown in Figure 38-8. Alternatively, if the index has already been inserted, right-click it and choose Edit Field ➪ Options. The switches used here are as follows:

- `\r`**:** Keeps index subentries on the same line as the main entry
- `\h " "`**:** Separates groups in the index with a blank line formatted with the Index Heading style
- `\c "2"`**:** Specifies the number of columns (2) to use for the index
- `\z "1033"`**:** Specifies the language ID (1033 means U.S. English)

FIGURE 38-8

Right-click an index and choose Edit Field ➪ Options if you want to understand the nature of the beast or modify it.



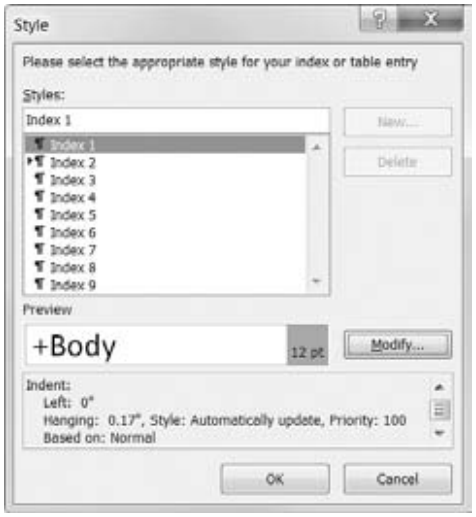
Subentries and Styles

You are not limited to just one subentry level. You can have up to nine levels in an index, which means up to eight subentries below the main entry. To designate additional subentry levels, separate them with colons in the subentry text field.

You can format different subentry levels differently. Word uses built-in styles named Index 1 through Index 9. By default, the only formatting differentiation is indent levels. If you want to change the associated formatting, in the References ribbon, choose Insert Index ➪ Modify, which displays the dialog box shown in Figure 38-9. As you click on Index 2 through Index 9, notice that, by default, only the Left Indent setting changes. To change the indentation or differentiate in other ways, click Modify to change these styles. For information on modifying styles, see Chapter 9.

FIGURE 38-9

Use the Style settings to further differentiate subentry level formatting in an index.



Creating Multiple Indexes

Word lets you create up to 26 separate indexes for a document. However, no automatic support for this is provided in the Index ribbon group. To create separate indexes, you must include the \f*index* switch in each of the XE fields you insert, where *index* identifies the index in which the item would be included. These 26 indexes can be designated as *a* through *z*, *alpha* through *zulu*, or *artichokes* through *zucchini*, the point being that they must start with the letters a through z, and that the names themselves aren't important.

When you insert the index, you also include a \f*index* switch in its field code. The `{ index \fa }` generates an index for index entries such as `{ XE \fa "finches" }`, `{ index \fb }` for index entries such as `{ XE \fb "larks" }`, and so on.

Summary

In this chapter, you've learned what you need to know to create an index. You've seen several ways to mark items for inclusion in an index, and you should have a good understanding of how indexes are made. You should now be able to do the following:

- Use the Mark Entry dialog box to mark a single occurrence of text or all occurrences of that text, and to mark additional entries without dismissing the dialog box
- Use a concordance file to mark a number of items in a document in one fell swoop
- Insert and compile an index
- Create multiple indexes for a document

CHAPTER 39

Tables of Authorities

If you're reading this and wondering, "Do I need a table of authorities?" the answer is probably "No." If you're an attorney, a paralegal, or a legal assistant, you know the answer to that question. Unless you work in the legal field, however, you probably will never need to care about tables of authorities. Even so, if you're the least bit curious, you might be interested in discovering one of those things that lawyers do when they're not in court arguing with Perry Mason.

A table of authorities is a list of references in legal documents, such as briefs, certifications, court orders, and decisions. References include court cases, decisions, statutes, ordinances, articles, books, rules, and regulations, along with additional details necessary to enable the reader to see the connections being asserted.

A table of authorities works a bit like the Citations & Bibliography tools in that there are citations and a resulting table of authorities (like a categorized bibliography) that lists the references (authorities) upon which your arguments, assertions, and billing statements rely.

Creating a table of authorities is a two-step process:

1. Mark citations.
2. Insert/build the table of authorities.

Word 2010's table of authorities tools reside in the Table of Authorities group in the References ribbon, as shown in Figure 39-1.

IN THIS CHAPTER

Marking citations

Long and short citation forms

Inserting a table of authorities

Formatting a table of authorities

Removing page numbers from a table of authorities

FIGURE 39-1

Mark citations and insert and update the table of authorities from the Table of Authorities group in the References ribbon.



Citations

The first step, as noted in the preceding section, is to mark the citations. Citation entries come in two flavors:

- **Long:** Long citations are the full legal reference that actually appears in the table of authorities itself. These include the name of the authority (case name or statute name, for example) and the full legal reference for it. You use a long citation the first time an authority is cited. An example of a long citation is *Boutilier v. Immigration & Naturalization Service, 387 U.S. 118 (1967).*
- **Short:** Short citations are informative but shorter versions of long citations. These are used subsequent to the first time an authority is cited, and are not used in the table of authorities itself. These are very similar to the kinds of citations shown in Chapter 36. An acceptable short version for the long citation of the case just cited would be *Boutilier v. INS (1967).*

To begin, select the citation you want to mark (this isn't essential, but usually saves time), and then click the Mark Citation tool or use the keyboard shortcut.

Tip

In the References tab, hover your mouse over the Mark Citation tool in the Table of Authorities group. If tooltips are enabled (File ➪ Options ➪ Display ➪ Show document tool tips on hover), the tooltip indicates not only what the tool does, but the fact that its shortcut key is Alt+Shift+I. If you work in the legal field, this is probably one of the only times you will come this close to the Mark Citation tool. Using the keyboard shortcut will save you considerable time. ■

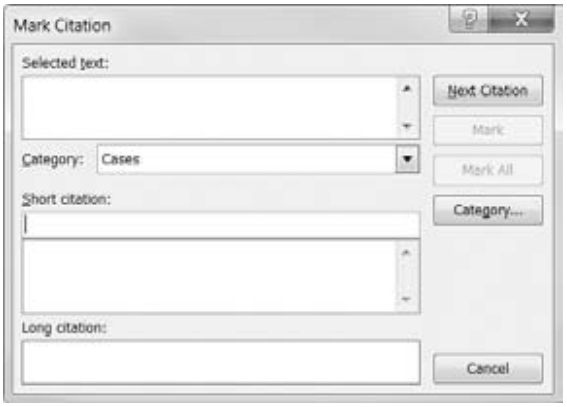
As shown in Figure 39-2, the selected text is copied to both the Selected text and the Short citation text fields in the Mark Citation dialog box.

Formatting Long Citation Entries

Use the Selected textbox as a formatting vehicle. Often, you want an item structured and/or formatted differently in the table of authorities itself from how it appears in the text. Use cut, copy, and paste to edit the Selected text field as needed. Use shortcut character formatting keystrokes to format the text as you want it to appear in the table of authorities itself: Ctrl+B, Ctrl+I, Ctrl+U, and so on, including Ctrl+D, work in the Selected text field.

FIGURE 39-2

When a citation is selected, Word copies it to two fields in the Mark Citation dialog box.



The full selected citation was also copied to the Short citation field, even though that's probably not how you want the short citation to appear. Edit it so that it matches all occurrences of the short citation in other parts of the document. Note that character formatting keystrokes do not work in the Short citation field.

Adding Categories

Use the Category drop-down list to choose the appropriate one for the authority being cited. If there is no category that fits, click the Category button. As shown in Figure 39-3, click one of the number placeholders (8 through 16) and type a new category name in the Replace with field. Click Replace to replace the number with the category you type. You can replace additional ones as well while you're here, if you want to save time later. When you're ready, click OK (Cancel pretends you were never here).

FIGURE 39-3

Word has seven built-in authorities categories. You can add up to nine additional categories.



Marking the Citations

Back in the Mark Citation dialog box, ensure that the correct category is selected. Then click Mark to mark the current citation, or Mark All to mark all citations matching the text in the Short citation field.

After clicking Mark or Mark All, the contents of Selected text slithers down into the Long citation field, and the Mark Citation dialog box remains open for business. Because the Mark Citation dialog box is nonmodal, you can switch between it and the text to continue on your merry way, marking other citations with wild abandon. When you're done, click Close.

Citation Fields

When you mark a citation, it is inserted as a non-collapsible field code with hidden text formatting applied. To see the citation fields, which all begin with TA, you might need to toggle the display of nonprinting formatting characters (Ctrl+Shift+*, or click the Show/Hide ¶ tool in the Home ribbon's Paragraph group). A typical TA field appears as follows:

{ TA \l "Carey v. Brown, 447 U.S. 455, 467 (1980)" \s "Carey v. Brown (1980)" \c 8 }

Removing Citations

The table of authorities interface does not provide a neat way to remove or edit citations. Removal is something you might want to do if a citation is in error, or if you no longer refer to it in the text. Notice in the Mark Citation dialog box that there is no Edit, Delete, or Remove button. If you need to remove citations, you simply delete the field code. To completely remove all citations of a given authority/source, if there are multiple citations, you need to remove all occurrences of that field code.

Tip

Use Find and Replace to remove unwanted citations. You might want to take a quick look at the full table of authorities to ensure that you don't have multiple cases with similar names. If you do, specify as much of the field as needed in the Find what field to ensure a correct hit. Press Ctrl+H to display the Find and Replace dialog box with the Replace tab active. In Find What, type ^d ta followed by as much of the beginning of the citation as you need in order to find it (you might want to copy TA and what follows from inside an existing TA field, and then paste it into the Find what box after the ^d). Notice that you need a space between ^d and ta. For the case citation shown in the preceding section, for example, you might use ^d ta \l "Carey v. Brown. The ^d tells Replace to search for a field code. The space and what follows are what's actually contained within the field braces.

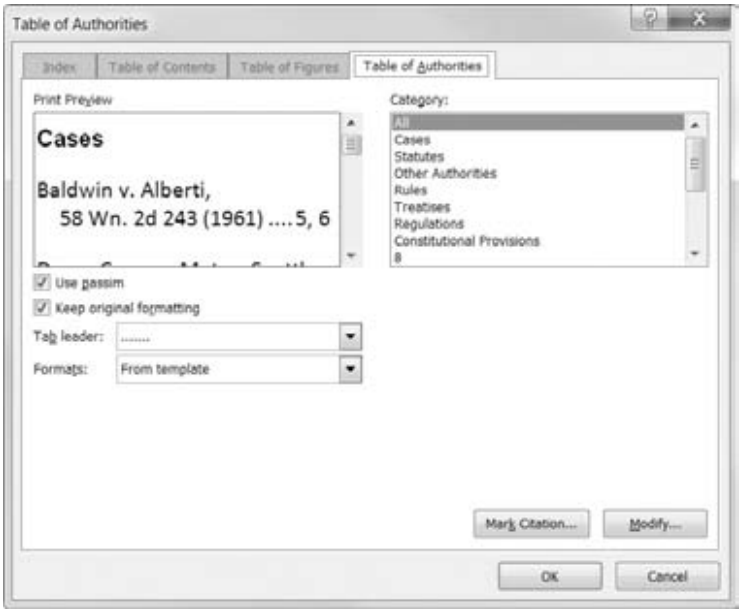
Clear any text or formatting that might be in or associated with the Replace with field. Try Replace a few times to ensure that it's finding the citations you want to zap, and then click Replace All if you're sure you're matching the right citations. ■

Inserting the Table of Authorities

To insert a table of authorities, click the Insert Table of Authorities tool in the References ribbon. As shown in Figure 39-4, the Table of Authorities dialog box appears. Make your selections and then click OK to insert the table of authorities.

FIGURE 39-4

Use the Table of Authorities dialog box to insert a table of authorities for any or all categories.



Category

Word can insert tables for any one or all categories. You can't pick and choose which categories to insert using the interface (except by repeatedly using Insert Table of Authorities). If you click All, Word inserts only those categories that actually occur in the document. Word inserts a separate TOA field for each category.

Tip

To use more than one but fewer than all categories, go ahead and use the All option. Word inserts multiple TOA fields — one for each category used in the document. Then, delete or move those parts of the table you don't want used. If you plan to use this strategy, make sure you've actually finished the document and citations to avoid having to repeat this sleight of hand. ■

Use Passim

Passim is commonly used in a table of authorities to indicate that a case is cited multiple times throughout the document. Specifically, if the Use passim option shown in Figure 39-4 is enabled, Word replaces the page number with *passim* in the table of authorities.

Note

Passim is a Latin word that literally means scatteredly, from _passus_, which is the past participle of _pandere_, meaning to spread out. In legal documents it means "here and there." ■

Formatting

When you select a citation and use Mark Citation, Word uses any character formatting that is applied to the selection when it copies that text to the Selected text field. You can make any modification you need in the Selected text field. Once you click Mark or Mark All, from then on, Word ignores the formatting of the original item in the document, and "original formatting" thereafter refers to the formatting that appears in the Long citation field.

Keep Original Formatting

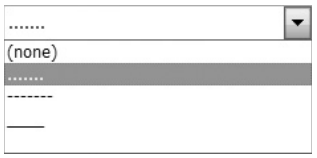
Use the Keep original formatting option to apply the formatting specified in the Long citation field when Word creates the table of authorities. If this option is turned off, Word uses only the formatting specified in the Formats drop-down list.

Tab Leader

Tab leaders are used to connect listed legal sources with the page numbers. Use the Tab leader drop-down list to choose one of the styles shown in Figure 39-5.

FIGURE 39-5

Tab leaders help the reader line up items with page numbers.

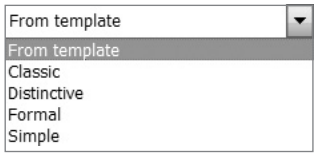


Formats

For overall formatting of the table of authorities, Word offers a choice between the current template table of authorities styles (TOA Heading and Table of Authorities) and one of the four preset formats shown in Figure 39-6.

FIGURE 39-6

Choosing the From template option applies the current template's TOA Heading style to each category heading, and the Table of Authorities style to the individual cases/sources.



Modifying Table of Authorities Styles

If none of the preset formats suit your needs, choose From template, as shown in Figure 39-6, and then choose Modify, which displays the dialog box shown in Figure 39-7. Word uses the TOA Heading style for each category (for example, Cases, Statutes, Regulations, and so on), and uses the Table of Authorities style for the individual authorities cited. Click the style you want to change, and then click Modify to use the Modify Style dialog box to change the selected style. See Chapter 9 for more information on modifying styles.

FIGURE 39-7

Choose a different style for the table of authorities, if desired; click Modify to change the formatting of the selected style.



Updating a Table of Authorities

To update the table of authorities, right-click the section you want to update and choose Update Field. Alternatively, if the References ribbon is showing, click the Update Table tool in the Table of Authorities group. To update the entire table of authorities, select all of the components. Now you can press F9, click the Update Table of Authorities tool in the Reference ribbon, or right-click the selection and choose Update Field.

Converting a Table of Authorities to Static Text

In many legal documents, the accepted standards do not use page numbers. This is especially true in short briefs for which the use of page numbers isn't particularly useful. Unfortunately, Word's table of authorities feature makes no provision for suppressing page numbers entirely. The `\n` switch, which so neatly suppresses page numbers in a table of contents field, has no effect in a table of authorities.

If you need to suppress page numbers in a table of authorities, wait until the document is finished, convert the table of authorities to static text, and then remove the page numbers manually. To convert a table of authorities to static text (as opposed to a dynamic field that can be updated), select it and press Ctrl+Shift+F9. Once it contains just static text, you can delete any page number and/or leaders using ordinary editing techniques. If necessary, press Ctrl+Shift+* to toggle nonprinting marks on so you can use tabs and paragraph marks as editing guides.

Summary

In this chapter you've learned how to mark citations in a legal document for inclusion in a table of authorities. You should now be able to do the following:

- Mark citations
- Format long citations to control how they appear in a table of authorities
- Create short citations so that they match all occurrences in a document
- Insert and format a complete table of authorities
- Remove page numbers from a table of authorities as needed
- Remove unwanted citations

CHAPTER 40

Hyperlinks and Cross-References

With the emergence and spread of the information superhighway come many resources that make themselves available in Word documents. These resources span the range from local (your own computer system) to local area networks to wide area networks and to the Internet. This chapter looks at how to go about tapping into those resources using facilities available in Word.

We've already looked at a number of ways that take advantage of content both internal and external to a Word document. In this chapter, the idea isn't to replow ground we've already tilled. Instead, the idea is to bring together these ostensibly disparate facets of Word. This chapter looks at a variety of different features that enable you to recycle and repurpose information in Word so you don't end up having to reinvent the wheel.

IN THIS CHAPTER

- **Automatic hyperlinks**
- **Hyperlinks to headings and bookmarks**
- **Hyperlinks to other Office documents**
- **Hyperlinks to e-mail addresses (with the subject already filled in)**
- **Cross-references to headings, numbered items, bookmarks, footnotes, endnotes, and more**

Hyperlinks

Anyone who surfs the Internet is familiar with hyperlinks. Hyperlinks often appear as underlined text that is a different color from the surrounding text. When you hover the mouse over a hyperlink, the status bar in the current program or a tooltip displays the location of the content associated with the link. If you click a link, your computer attempts to display the information contained at the indicated address using the program that's associated with it.

In Word, there's actually only one thing that's technically called a *hyperlink* — references created using the Hyperlink tool in the Links section of the Insert ribbon. In a broader sense, however, any link in a document is a hyperlink if clicking it results in the display of information from another document or location. This chapter looks at actual hyperlinks inserted using the Hyperlink tool in the Links group on the Insert ribbon tab, as well as *de facto* hyperlinks that are inserted automatically or through the use of other features.

Automatic Hyperlinks

For some kinds of hyperlinks, you don't need the Hyperlink feature. All you need is your keyboard and some accuracy. Choose File ➪ Options ➪ Proofing ➪ AutoCorrect Options ➪ AutoFormat As You Type. Under "Replace as you type," click to enable "Internet and network paths with hyperlinks." Click OK ➪ OK.

With that option enabled, if you type `www.wiley.com` and press any kind of separator (space, comma, period, and so on), Word automatically converts what you type into a fully qualified hyperlink, complete with `http://` at the beginning. Similarly, if you type an e-mail address, such as `donaldduck@disney.com` or `santa@northpole.com`, they are converted into fully qualified clickable (or Ctrl+Clickable) *mailto* links. Correctly specified network paths are also converted into hyperlinks (for example, `\\\\tomjones\\c\\reports\\jan07report.doc`).

Note

***HTTP* stands for Hypertext Transfer Protocol, and is the set of computer instructions for transferring information over the World Wide Web, which makes up a large portion of the Internet.**

***mailto* is the proper beginning of a fully formed e-mail hyperlink. Clicking an e-mail hyperlink opens the default e-mail handler, using the hyperlinked e-mail address as the destination address. ■**

Using and Displaying Hyperlinks

Sometimes you explicitly insert hyperlinks. Other times, Word creates hyperlinks for you. A number of different Word features by default automatically produce clickable hyperlinks. When you create a table of contents, by default, the resulting entries are hyperlinks to the headings associated with them. When you move the mouse over a table of contents entry, a tooltip tells you how to go to the associated content, as shown in Figure 40-1. Other hyperlinks display in a similar fashion, but whether a tooltip displays at all, and whether you click versus Ctrl+Click to follow a link, are options you can change.

Note

Tooltips are displayed by default. If you don't see a tooltip when you hover the mouse over a link, either it does not contain tooltip text or tooltips are turned off. To enable tooltips, choose Office ➪ Word Options ➪ Display tab ➪ Show document tooltips on hover, as shown in Figure 40-2. ■

FIGURE 40-1

A tooltip indicates that something is a hyperlink, the location of the content, and how to get there (Ctrl+Click, in this case).

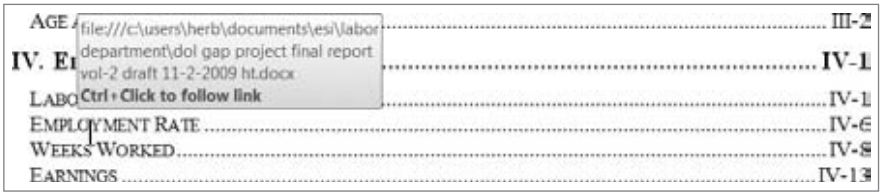
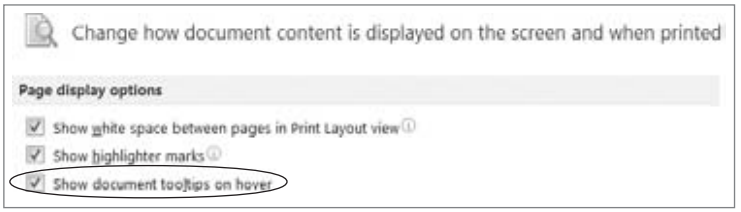


FIGURE 40-2

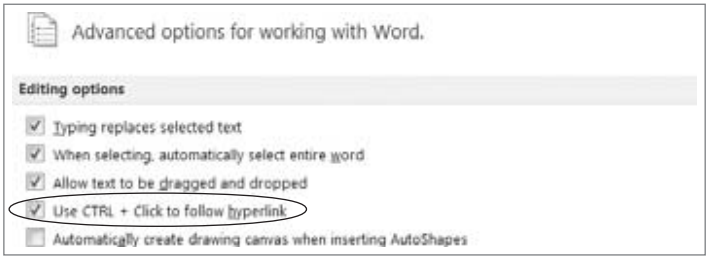
Tooltips help you see where the links are, but links work regardless of whether tooltips are displayed.



Note in Figure 40-1 that the tooltip tells you to use Ctrl+Click to follow the link. Whether you simply click or Ctrl+Click is controlled by another Word setting, shown in Figure 40-3. To change this setting, choose File ➪ Options ➪ Advanced tab, and find the "Use CTRL+Click to follow hyperlink" setting in the Editing Options section. When you're editing a document, it can be distracting and counterproductive if you inadvertently activate a link when you're actually trying to select it rather than follow it. If you're reading a document, on the other hand, it can be annoying to have to reach for the keyboard to follow a link. Pick a setting that works for you, and change Word's behavior if it doesn't fit how you work.

FIGURE 40-3

Enable Use Ctrl+Click to prevent Word from following links when you click on them.



Inserting Hyperlinks

As indicated, some Word features automatically insert hyperlinks by default. These include inserting a table of contents, cross-references, certain objects, and footnotes and endnotes. Some of these, along with hyperlinks inserted directly, yield a tooltip telling you to click or Ctrl+Click to follow them, such as table of contents and cross-references, whereas others such as footnotes and endnotes don't. To navigate to a footnote or endnote, in fact, you double-click rather than use the setting shown in Figure 40-3. Yet, because they contain a means of transporting you elsewhere in a document, endnotes and footnotes really are hyperlinks — in spirit, if not in fact.

The Links Group

Aside from hyperlinks that are created automatically, most other Word hyperlinks are inserted or made possible by the Hyperlink and Cross-reference controls in the Links group in the Insert ribbon, shown in Figure 40-4. When you hover over a tool in the ribbon, a Super Tooltip usually indicates whether a given tool has a default shortcut key assigned. Notice that both Hyperlink and Bookmark have shortcuts, whereas Cross-reference does not. (Bookmarks are covered in Chapter 32.)

FIGURE 40-4

Bookmarks give you something to link to, and Hyperlinks and Cross-references help you create links to bookmarks and other locations.



Inserting a Hyperlink

When you use the Hyperlink tool shown in Figure 40-4, Word uses the Insert Hyperlink dialog box, shown in Figure 40-5. The contents of the Insert Hyperlink dialog box vary depending on what is selected along the left-hand side under Link to.

Note

If the insertion point already contains a hyperlink, clicking the Hyperlink tool displays the Edit Hyperlink dialog box. It is similar to the Insert Hyperlink dialog box, but also contains a Remove Link button. You can use this button to restore a hyperlink to normal text. The result is similar to what happens when you use

the Unlink Field command (Ctrl+Shift+F9). Remove Hyperlink, along with additional hyperlink commands, can also be found by right-clicking a hyperlink. The pop-up options are shown in Figure 40-6. ■

FIGURE 40-5

Use Insert Hyperlink to create a variety of different kinds of hyperlinks.

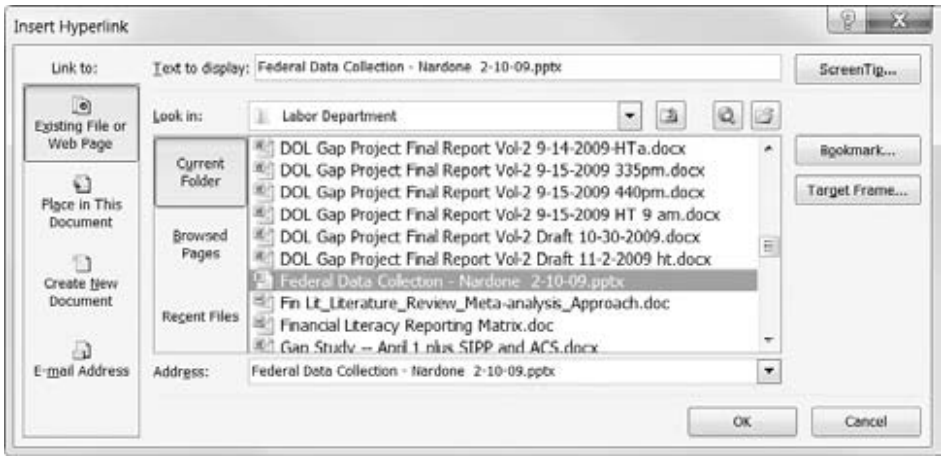
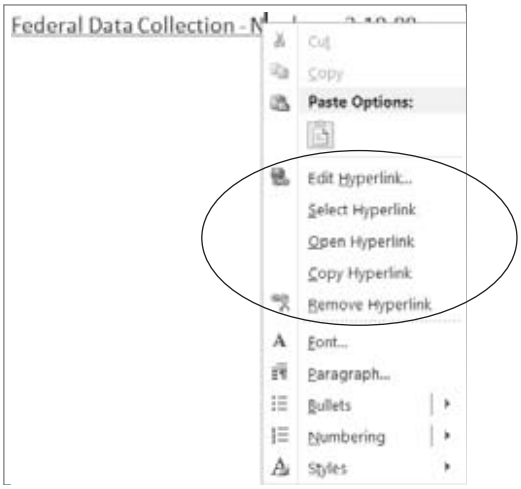


FIGURE 40-6

Right-clicking a hyperlink produces a variety of hyperlink-related commands.



Link to Existing File or Web Page

Use the Existing File or Web Page option to link to any file on your computer, your network, or the Internet. Any given URL (universal resource locator) ultimately corresponds to a file. Available options shown in Figure 40-5 are described in Table 40-1.

TABLE 40-1

Hyperlink Dialog Options and Controls

Option	Use
Current Folder	Use in conjunction with Look in, Up One Folder, and Browse to File to select the file of interest.
Browsed Pages	Use to select a URL from a list of recently browsed web pages.
Recent Files	Use to select a recently opened Office or HTML file.
Text to display	With a file selected, the name of the file is displayed in the Text to display field. You can replace that text with something more informative if you like.
ScreenTip	Use the ScreenTip control to tell the reader what the link will do. This is especially useful if the link does something unexpected, such as open a different application (especially something other than a browser).
Bookmark	If the selected file is a Word document or an HTML document, click Bookmark to target the hyperlink more narrowly, as shown in Figure 40-7. In ''Select a place in this document,'' click the bookmark you want to link to, and then click OK.
Target Frame	Complex web pages can contain multiple frames for controlling how content is displayed. When using frames, use this setting to specify the frame in which you want the linked content to appear.

Link to a Local File

To link to a local file on your own computer (which can be any file — you are not limited to linking just to Word files), use the Look in, Up One Folder, and/or Browse for File tools to navigate to the file you want to link. Most users find that Browse for File provides a better way to locate files, because you can use Files of Type or provide a partial file specification in the File Name box to help you narrow the list of files you see. When you find the file, click it to select it. Choose any options, as described in Table 40-1, and click OK to insert the hyperlink.

Link to a Web Page

To link to a web page, it's easiest if you're linking to one that's recent. Use the Browsed Pages control shown in Figure 40-5 to determine whether the page you seek is there. If not, click the Browse the Web button. Use your browser to navigate to the page you want to link. When you return to the Insert Hyperlink dialog box, the URL from your browser is automatically copied into the Address field. Choose any options and then click OK to insert the link.

Tip

With your browser open to the link you want to insert, if you click in your browser and click in the Insert Hyperlink dialog box, the URL is automatically copied to the Address field in the Insert Hyperlink dialog box. Alternatively, even if the Insert Hyperlink dialog box isn't open, you can click the icon at the beginning of the address in your browser window and drag that address into the Word window to insert a hyperlink. ■

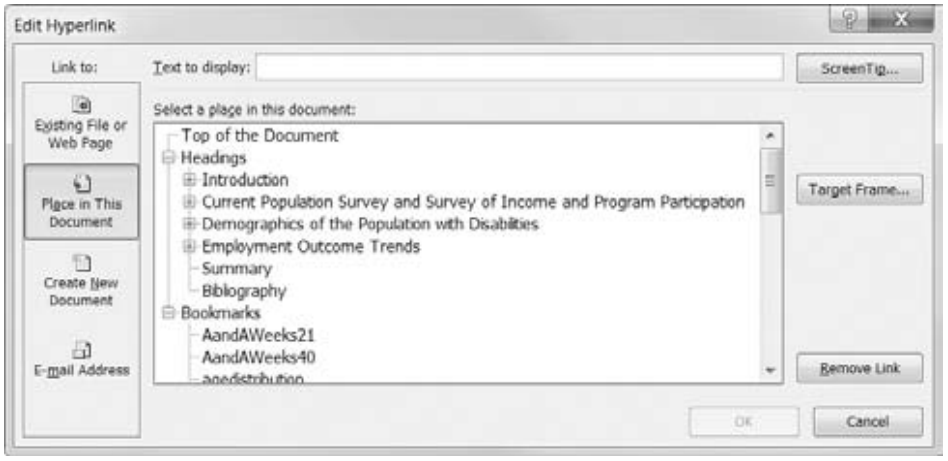
Link to Place in This Document

Word provides two main ways to link to a place in the current document. You've already looked at one way — using the REF field — in Chapters 21 and 32. By using the `\h` switch, in fact, the REF field can be a hyperlink, as well. We look more closely at the REF method later in this chapter in the discussion of cross-references.

When using a hyperlink to another place in the same document, you're not limited to using bookmarks as the destination. Choose Hyperlink in the Insert ribbon, and then click Place in This Document. As suggested by Figure 40-7, you can link to any bookmark or heading in the document. For the latter, all text formatted using the styles Heading 1 through Heading 9 is presented under "Select a place in this document." Note that non-Heading text with Level formatting applied is not included.

FIGURE 40-7

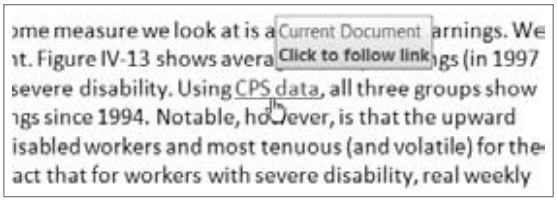
When hyperlinking within the current document, you can link to a heading or a bookmark.



If the bookmark or heading name doesn't meet your needs as the Text to display, modify or replace the display text as needed. Click ScreenTip, if appropriate for the document, and choose any other options you need, and click OK. The hyperlink is inserted as shown in Figure 40-8.

FIGURE 40-8

Hyperlinks are displayed using the Hyperlink style, which by default is blue and underlined.



The Hyperlink Field

The hyperlink is inserted as a field code. In this instance, the underlying field code is as follows:

```
HYPERLINK  \l "_Executive_Summary" \o "Ctrl+Click to display the
  Executive Summary."
```

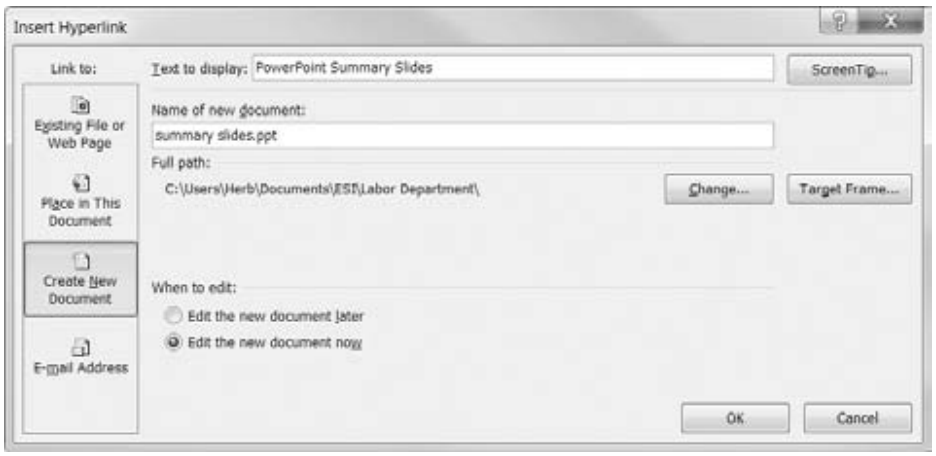
If you return to the Insert Hyperlink dialog box and look for a bookmark that matches the one shown in the field code (Executive_Summary in this instance), you won't find it. If you click Bookmark in the Insert ribbon, however, and enable Hidden bookmarks, you will now see it. It is hidden to prevent you from confusing your bookmarks with Word's. (You might recall that in Chapter 32 it was pointed out that some features work by inserting hidden bookmarks. This is one of them.)

Link to Create New Document

Sometimes the document to which you want to link does not yet exist. You can use the Create New Document option to create a placeholder document, with contents provided later, or you can create the document now, as shown in Figure 40-9. Use the Change button if necessary to navigate to a different folder in which you want to store the new file.

FIGURE 40-9

Use Create New Document to create either a new document or a placeholder for one that will be created later.



The usual reason for using this feature is to create a placeholder, in effect, for a file whose content you will provide later. You are not limited to linking to an existing Word file. However, if you choose "Edit the new document now," Word's ability to transfer control to a capable program might be limited. For other Office documents such as PowerPoint and Excel, there

shouldn't be a problem, as long as the program is installed. If you choose "Edit the new document now," when you click OK, Word creates a hyperlink to the file, and then starts the appropriate application. Do what's needed to create the file and then save it. Word will properly link to it when you Ctrl+Click (or Click, depending on your settings) on it later.

If the file you specify is something else, however, such as a `.mid` or `.mp3` file, it could be problematic transferring control to a program to create the file. Though Word usually knows how to display such files, it might not know how to create them, in which case you might see the error shown in Figure 40-10. Click Yes to create an empty file, and then manually open the program you need to create or otherwise download or obtain the needed file.

FIGURE 40-10

If the method for creating a given file type is unknown to Windows, you can create an empty file now and give it substance later.



Link to E-Mail Address

The final kind of hyperlink you can insert using the Insert Hyperlink dialog box is a *mailto* (e-mail) link. This sort of link often is inserted into web pages and other documents as a head start for an e-mail that is being suggested in the document, as shown in Figure 40-11. Notice that it says Edit Hyperlink rather than Insert Hyperlink.

Note

In this case, the e-mail link was created and the Hyperlink tool was clicked. Notice also that the Subject and Recently used e-mail addresses fields both contain %20 instead of spaces. That's a hexadecimal code for a space — 20 in hex is 32 in decimal, and 32 is the decimal code for a space. This is the way that spaces are represented in Internet addresses. Finally, note that the mailto line in the Recently used e-mail addresses field contains the entire specification, not just the e-mail address. ■

When you insert an e-mail link, Word uses the Hyperlink field and the mailto specification used for Internet e-mail addresses. In this case, the field code used is

```
HYPERLINK "mailto:information@bigrichcorporation.biz?subject=
  Request%20for%20Information"
```

This is standard HTML syntax for including an e-mail link in a web page. Such links work in Word, too. For example, if you have Outlook installed and click an e-mail link, Outlook will be started, as shown in Figure 40-12.

FIGURE 40-11

When you follow an e-mail link, your default e-mail program is started with the E-mail Address and Subject line filled in.

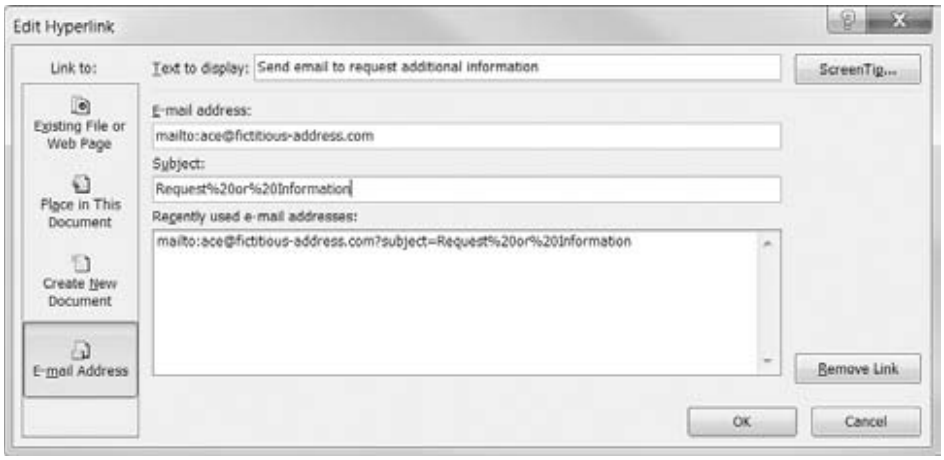
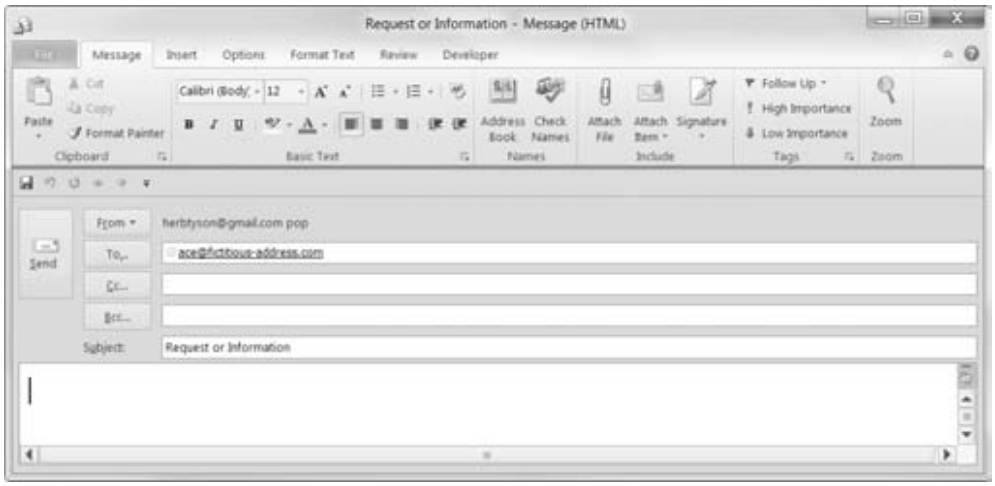


FIGURE 40-12

Clicking an e-mail link can fill out the To and Subject fields for you.



Inserting Cross-References

Just as a hyperlink can serve as a type of cross-reference, Word's cross-references can also serve as a type of hyperlink. It's simply a matter of clicking the Insert as Hyperlink checkbox! This adds the `\h` hyperlink switch to the REF field that is created.

Note

When a cross-reference includes the hyperlink option, it is not underlined and formatted with the Hyperlink style. That's because it isn't a hyperlink field, and you cannot apply the hyperlink style to something that's not a hyperlink. Go ahead and try it! It doesn't change the way the cross-reference field is displayed. If field code shading is displayed, the "link" will display as shaded. Other than that, no formatting is applied. If you want such items recognizable as hyperlinks, you can create a new character style and apply it, instead. See Chapter 9 for more details on styles. ■

Word's cross-reference feature enables you to create cross-references to each of the following:

- Numbered items
- Headings
- Bookmarks
- Footnotes
- Endnotes
- Equations
- Figures
- Tables

The method is similar for all of these, although the options offered diverge once you make a selection. They all begin with the same basic dialog box, shown in Figure 40-13. The Separate numbers with option is grayed out for all reference types except Numbered items and Bookmark. For those two, it is enabled for the (full context) items.

Headings

To insert a cross-reference to a heading, click the Cross-reference tool in the Insert ribbon, and set Reference type to Heading. As shown in Figure 40-13, the dialog box displays all headings (everything formatted with Heading 1 through Heading 9 styles) under "For which heading."

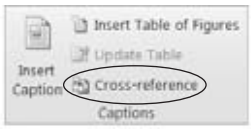
Use "Insert reference to" to control the kind of cross-reference that is inserted. For cross-references to headings, the options are as follows:

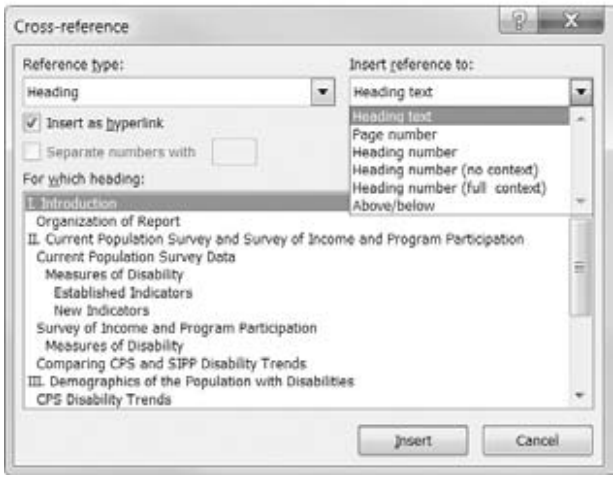
- **Heading text:** The actual text of the heading (for example, Executive Summary)
- **Page number:** The page number on which the cross-referenced item begins
- **Heading number:** If paragraph numbering is used, this displays the heading number relative to the cross-reference's location in the numbering structure. For example, if the cross-reference to 2.(b)(ii) is inserted within 2.(b)(i), the number used is (ii).
- **Heading number (no context):** A cross-reference to 2.(b)(ii) will always be inserted as (ii) from anywhere in the document.
- **Heading number (full context):** This option always displays the complete number; for example, 2.(b)(ii) regardless of where the cross-reference is inserted.

- **Above/below:** The word *above* or *below* is inserted to show the location of the cross-reference relative to the insertion point. For example: See the Executive Summary, *above*.

FIGURE 40-13

The Cross-reference dialog box, shown here in Heading mode, is really eight dialog boxes in one.





Numbered Items

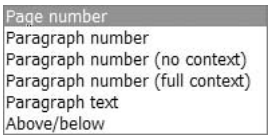
You can insert cross-references to any item that has Word's numbering applied to it. Note that this does not include sequence numbers or the different AutoNum numbering fields. It includes only items that use Word's numbering, whether applied directly or using a style.

To insert a cross-reference to a numbered item, click Cross-reference in the ribbon and choose Numbered Item from the Reference Type list. When you drop down the Insert reference to list, the options, shown in Figure 40-14, are very similar to those that appear for headings.

Note that if the Separate numbers with option (shown in Figure 40-13) is used, adjacent number levels will use the separation character specified. For example, if the character is /, then 1)a)iv) would display as 1)/a)/iv). It is sometimes useful to use a space as the separator to clarify which level is which.

FIGURE 40-14

Numbered item reference options are similar to heading reference options.

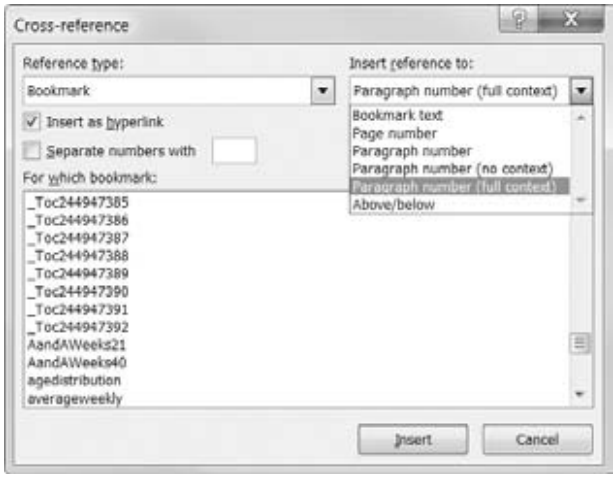


Bookmarks

If you were looking for a reason to use a cross-reference rather than a hyperlink, you might find that cross-referencing bookmarks has a slight edge. Notice in Figure 40-15 that the list under For which bookmark includes several with names that begin with an underscore (_). This is a telltale sign that these are hidden bookmarks inserted by Word. Recall that when inserting a hyperlink to a bookmark, the listing did not include hidden bookmarks. (Note that hidden bookmarks appear in the Cross-reference dialog box only if Hidden Bookmarks are checked in the Bookmark dialog box.)

FIGURE 40-15

Separate numbers with can help the reader tell when one number ends and the next begins.



Notice also that Separate numbers with is available for the Paragraph number (full context) reference. As noted, it is available only for that reference, and only for bookmarks and numbered item reference types.

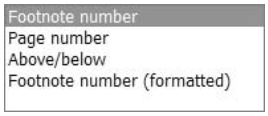
The Insert reference to options are similar to those already shown. See the discussion under "Headings" for the explanation of what each type does.

Footnotes and Endnotes

Cross-references to footnotes and endnotes are handled identically. Notice in Figure 40-16 that the Insert reference to options are fewer and different. If you choose Footnote number, the reference is just to the number. If you choose Footnote number (formatted), the reference number will appear just as it does when the footnote is inserted into the text. This enables you to reuse the same footnote in multiple places in your document. This can be handy when the same footnote can fill multiple shoes.

FIGURE 40-16

When referring to a footnote or endnote number, you can display the number as formatted or unformatted.



Equations, Figures, and Tables

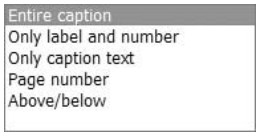
Cross-references for equations, figures, and tables are identical. Note the Insert reference to options shown in Figure 40-17. Numbered cross-references are designed to work with the SEQ field. For equations, figures, and tables Word uses SEQ fields with numbering keywords named Equation, Figure, and Table, respectively. Note that capitalization of the keyword matters. If you've numbered your figures using { SEQ figure } or { SEQ FIGURE }, Word will not recognize your figures. If you used { SEQ Figure }, you're in the game. Notice, however, that capitalization of the field name "SEQ" doesn't matter one iota.

Note

If you already read Chapter 20, you know that there is no wonderful built-in equation numbering solution for Word's equations. Automatic captioning does not work for it either, so if you want to refer to a numbering system you cobbled together, you can take advantage of the cross-reference feature only if you use SEQ Equation to number your equation creations. ■

FIGURE 40-17

If you word captions carefully, they'll make sense when you refer to them in the text.



Summary

In this chapter you've gotten the inside scoop on hyperlinks and cross-references, including how they're created and how to use them. You should now be able to do the following:

- Create hyperlinks to just about anything in Word
- Cross-reference anything in Word, including to hyperlinks (hint: you can cross-reference or hyperlink anything that's bookmarked)
- Tell your colleagues not to bother looking for hidden bookmarks when creating hyperlinks
- Hyperlink to anything you can browse to

Part VII

Getting Out the Word

Any self-respecting Bible ultimately has something to say about the sacraments of marriage, and the *Word 2010 Bible* isn't any different. Part VII deals with ways of marrying data and documents. What will the family and neighbors say? They'll say it's a match made in, uh, cyberspace.

Chapter 41 launches this part by dealing with the often tedious question of data sources. Chapter 42 gets your documents ready to go out the door by addressing your envelopes and labels. In Chapter 43, you learn how to put databases together with documents to create *data documents*. Finally, Chapter 44 shows you how to use Word's form facilities to collect data.

IN THIS PART

Chapter 41
Data Sources

Chapter 42
Envelopes and Labels

Chapter 43
Data Documents and Mail Merge

Chapter 44
Forms

CHAPTER 41

Data Sources

This section of the *Word 2010 Bible* deals with specialized output formats, such as envelopes, labels, form letters, mass e-mail, catalogs, and directories. It might seem odd to start with the data source, but that's the most important consideration, and often receives the least attention. Once you've identified and correctly dealt with your data source, the rest of what you do is made much easier.

This chapter focuses on the Select Recipients aspect of a feature broadly yet shortsightedly known as Mail Merge. Why shortsightedly? If you glance back at the list of "specialized output formats," you'll see that it includes catalogs. Though recipients are indeed the focus of mail merge in general, the set of tools is ideally suited to creating documents that use a variety of data sources, not just data containing names and addresses. Once you fully understand the process, extending it to include and use other data sources, such as inventory or even research data, isn't a long stretch. Rather than contribute to the misidentification of such documents as mail merge documents, it is more appropriate to refer to such creations as *data documents*.

IN THIS CHAPTER

Data sources you can connect to Word

Data access and portability considerations

Data formats

Using data from Word, Outlook, Excel, Access, and the Web

Data Considerations

When thinking about mail merge, our first instinct often is "Let's get this over with as quickly as possible." Most users find, however, that like a visit to the post office, it's not something you do just once. Therefore, if you're going to have to return repeatedly, you might as well try to find the shortest route and get there when the lines aren't long.

Some data considerations, such as usability (does the data set contain what you need?) and accuracy pretty much go without saying. Other considerations are equally important, such as whether the data source will be available when you need it, the ease of updating the data source, and access to the data source both for other data consumers as well as data producers.

Access and Portability

Sometimes, *your* computer isn't the only data consumer. For some documents, access to data will be needed by you in other places (for example, on a notebook or laptop, for a presentation while traveling, on a different desktop computer at home, or elsewhere).

You can take several approaches to solving the need to either access data from multiple places or take the data with you. For the former, especially if the data source is large, unwieldy, or nonportable for other reasons, some kind of server solution will provide the answer. This might take the form of a data file residing on a SharePoint or other server. To see what's involved there, see Chapter 52. If you work in an enterprise, your company might have other kinds of server facilities that can serve as data sources for Word.

For portability, the answer often will be to extract a portion of a full data set — either a limited number of data records or a sample containing just the data fields you need. Every database has some unit or focus, such as individuals (for example, contact records) or products. Each person or product in a given database is called a *data record*.

Each piece of information about a person or product is called a *data field*. For example, a person's name, telephone number, address, e-mail address, and date of birth each would be data fields. For a product, data fields typically include name, SKU, shipping weight, price, color, description, and cost.

Unless a data set was constructed explicitly for a single purpose, most data sets will contain more records than you need, as well as more data fields than you need for a specific data-driven Word document. Often, it's possible to extract just what you need and take it with you. You have a variety of ways of doing that, as you see in this chapter.

Tip

To extract a portion of a larger database for use at a remote or inaccessible location, create a directory document using the mail merge feature, specifying only the records and fields you need. When you complete the merge, the resulting directory (or data document) will become the input data you need for associating with another data document. ■

Data Formats

Word enables you to use data from a variety of different formats. You can create a data source directly from Word as part of the mail merge process or use an existing source. If you use an existing source, your options include the following:

- Outlook contacts
- Office Database Connections (`*.odc`)
- Access Databases (pre-version 12: `*.mdb`, `*.mde`)
- Access 12 and later Databases (`*.accdb`, `*.accde`)
- Microsoft Office Address Lists (`*.mdb`)

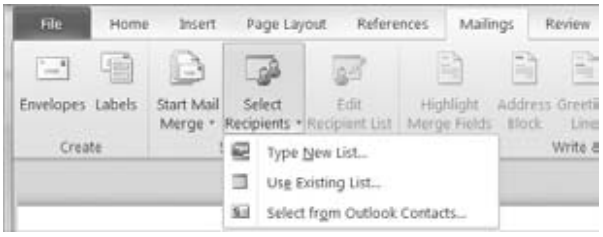
- Microsoft Office List Shortcuts (`*.ols`)
- Access Projects (`*.ade`, `*.adp`)
- Microsoft Data links (`*.udl`)
- ODBC File DSNs (`*.dsn`)
- Excel Files (`*.xlsx`, `*.xlsm`, `*.xlsb`, `*.xls`)
- Web Pages (`*.htm`, `*.html`, `*.asp`, `*.mht`, `*.mhtml`)
- Rich Text Format (`*.rtf`)
- Word Documents (`*.docx`, `*.doc`, `*.docm`, `*.dot`)
- Text Files (`*.txt`, `*.prn`, `*.csv`, `*.tab`, `*.asc`)
- Microsoft Works Databases (`*.wdb`)
- Outlook Personal Address Books (`*.pab`)
- Lotus 1-2-3 Files (`*.wk?`, `*.wj?`)
- Paradox Files (`*.db`)
- dBASE Files (`*.dbf`)
- Database Queries (`*.dqy`, `*.rqy`)

As you can see, you have a broad array of options. Most of them work in a similar fashion, so there's no need to go through each and every type. However, we will go through the most common formats used. As they are presented, keep in mind that although the examples repeatedly use names and addresses, you're by no means limited to those. The idea is to use Word to present and format data in some fashion; it doesn't matter to Word what the data are used for.

To begin, in the Mailings ribbon, click the Select Recipients tool, exposing the options shown in Figure 41-1.

FIGURE 41-1

When selecting a data file, you can create it from Word, use a variety of other formats, or select data from Outlook Contacts.



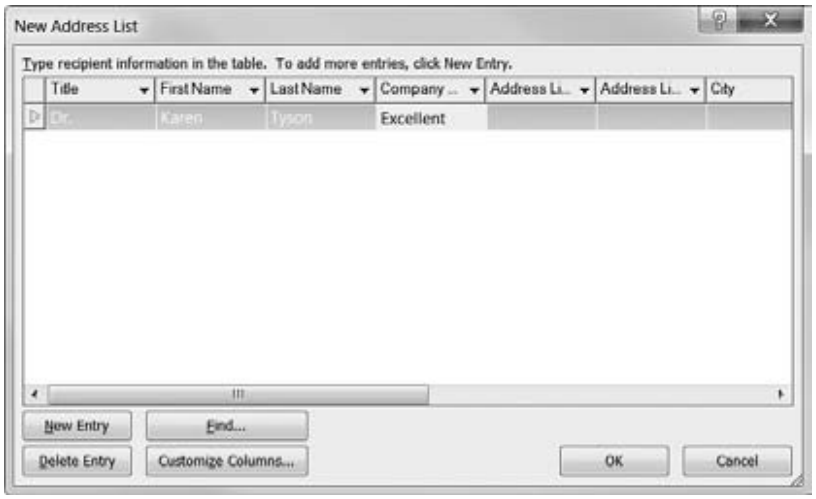
Type New List

To create a new list (a somewhat generic euphemism for that nasty word "database") in Word, choose Select Recipients ➪ Type New List, which displays the New Address List entry form

shown in Figure 41-2. Type your data into the fields shown, tabbing or clicking to get to the next entry field. To accept the current entry and enter a new record, click New Entry. To remove an entry, click Delete Entry.

FIGURE 41-2

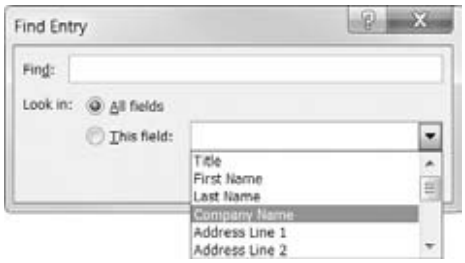
Although it says ''New Address List,'' this form can be used to enter all kinds of data that might have nothing to do with addresses.



If you've entered a lot of data and need to find a particular entry, click Find to display the Find Entry dialog box shown in Figure 41-3. Type the search text into the Find field, and set Look in as desired. Use the This field drop-down list to tell Word to search a particular field. Click Find Next (covered by the drop-down list in Figure 41-3) to find the next entry that matches the Find text in the field(s) specified. Click Cancel to dismiss the dialog box.

FIGURE 41-3

Once your data set is a bit larger, you might need some help finding a record.



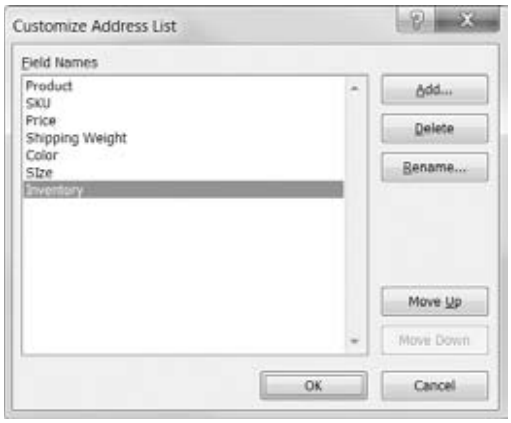
As noted elsewhere, the New Address List entry form can be used for addresses, but need not be. If the list of data elements or fields doesn't meet your needs, click Customize Columns, which displays the Customize Address List. As shown in Figure 41-4, you can use this list for entering entirely different kinds of data. To add a field, select the field above where you want to add the new field, and click Add. Type the field name in the space provided and click OK. To delete a field, select the field and click Delete. To rename a field, select it, click Rename, type a new name in the To field, and click OK. (To add a field at the beginning, select the first field and click Add, as before. The added field will be second on the list, not first. Select the added field and then click Move Up.)

Tip

To save time, rather than delete all of the existing fields and create new ones, rename the existing fields. They are not tied to particular types of data, so it doesn't matter what they're called. ■

FIGURE 41-4

If you want to use the Customize Address List for something other than addresses, Word will never know the difference!



To rearrange the fields, click a field you want to move, and then click Move Up or Move Down, as needed. When you're done customizing the "address list," click OK.

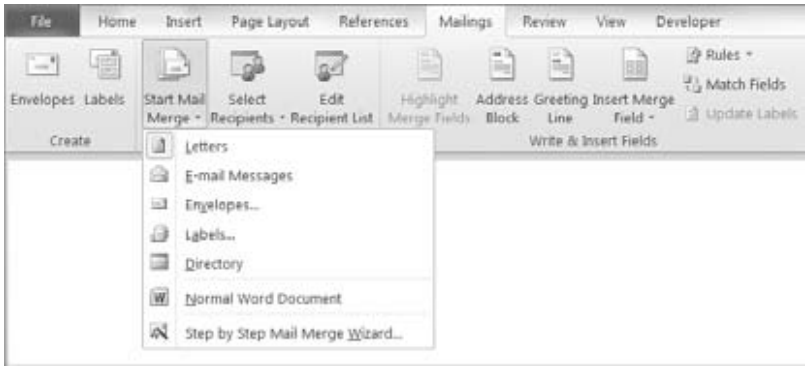
When you're finished entering data, click OK. Word now prompts you to save the file as an `.mdb` (Access) database file. Note that this is the only Save as Type option. Type a name and click Save.

Note

After you click Save, behind the scenes, Word associates the new file with the current document. If you didn't set a document type using Start Mail Merge, Word sets it to Letters, as shown in Figure 41-5. ■

FIGURE 41-5

If you select a data source before setting a document type, Word automatically sets the type to Letters. You can change the document type at any time.



Word

You can also use a Word document as your data source. Using a Word file as the data source usually works best when the data is stored in a table, but that's by no means essential. You can use a plain Word document in which the fields are separated by tabs, commas, slashes, and so on. Regardless of how the data file is formatted, Word assumes that the data file contains a header row or a header line. The header itself should be formatted the same way the data is formatted — separated by tabs, commas, in a table row, and so on.

Caveat Headerless Data Files

Because Word assumes that the first data record contains the column headers, if it doesn't, the first row of data is used as the header, as shown in Figure 41-6. David and Harold might not like being listed as Johns.

FIGURE 41-6

Beware of data files that don't contain a header row!



Unfortunately, once you've opened a headerless file as the data source, there is no simple and easy recovery. Because of a bug in the way Word handle's such files, Word keeps the data file

open and unavailable for editing until Word is closed. One possible approach is to scrap the mail merge operation (if you haven't proceeded very far), close Word, reopen Word, edit the data file, and start anew. Other approaches are also possible, such as opening a read-only copy of the original data file, editing it, saving the changed file using a new name, and then switching to that file as your data file. At least this way Word doesn't need to be closed and reopened, although it does leave you with a useless data file that you'll need to remember to delete later, after Word is closed.

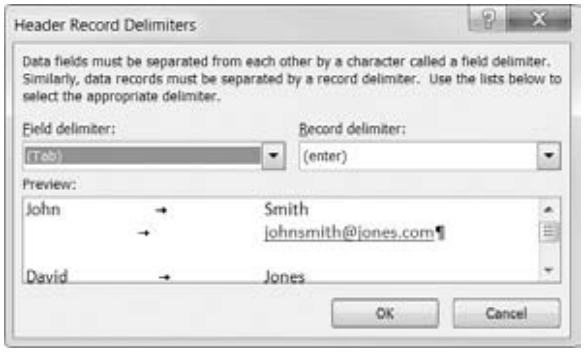
Opening a Word File as the Data Source

To associate a Word file as the data file, in the Mailings ribbon, choose Select Recipients ➪ Use Existing List. In the Select Data Source dialog box, set Files of Type to Word documents or All Word documents, whichever is appropriate. Navigate to the location of the file, select it, and click Open.

If your data file contains a Word table, control is returned to you, with the Edit Recipient List tool now available on the Mailings ribbon. If your data file is not in the form of a table, Word presents the Header Record Delimiters dialog box, shown in Figure 41-7. If Word guesses correctly, click OK. If not, then set the field and record delimiters so that they match the data file and click OK. Word now returns to the current document, with the Edit Recipient List tool available. You're now ready to begin building your data document. See Chapter 43 for the scoop on how to proceed.

FIGURE 41-7

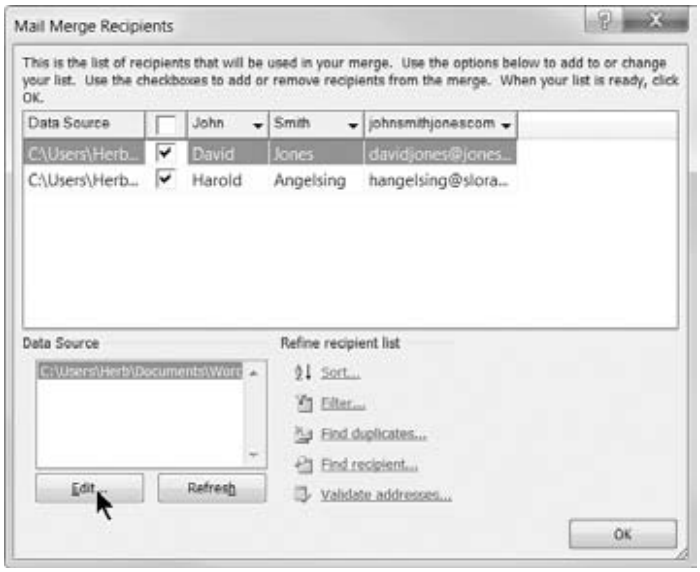
If the data file doesn't contain a table, Word asks you to confirm the nature of the field and record delimiters (separators).



Once the data file has been associated and opened, it's a good idea to click the Edit Recipient list so you can verify that the data set looks the way it should. If something is amiss, in the Mail Merge Recipients dialog box, under Data Source, click the data file listed, as shown in Figure 41-8, and then click Edit. Note that you can fix erroneous data this way, but you cannot fix an erroneous header.

FIGURE 41-8

To correct erroneous data, select the data file and click Edit.

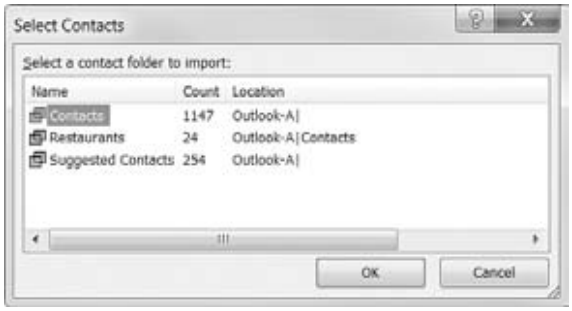


Outlook

One of the most common sources used within Word is Outlook's contacts. To use data from Outlook, choose Select from Outlook Contacts. In Select Contacts, shown in Figure 41-9, if multiple contact folders are displayed, click the one you want to use and click OK.

FIGURE 41-9

When you select an Outlook contact folder, Word imports it.



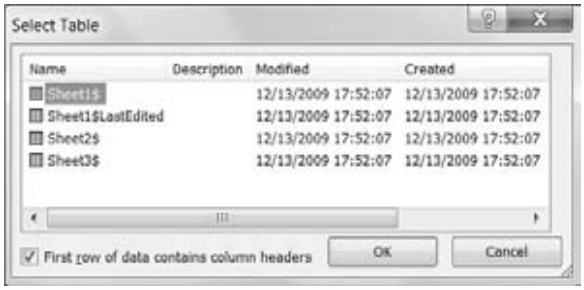
After clicking OK, the Mail Merge Recipients list appears. Make sure the ones you want are checked, and click OK. You're now ready to compose your data document. See Chapter 43 for details.

Excel

To use an Excel worksheet as your data source, in the Mailings ribbon, choose Select Recipients ➪ Use Existing List. In Select Data Source, set Files of Type to Excel Files. Navigate to the location of the data file you want to use, select it, and then click Open. In the Select Table dialog box, shown in Figure 41-10, click to select the table containing the data you want. Note that unlike when connecting to a Word data source, you now have the option to specify whether the worksheet contains a header row. Make the appropriate choice and click OK. That's it! You're now ready to compose your data document and insert references to the data in the Excel worksheet.

FIGURE 41-10

Before attaching an Excel data source to a Word document, it helps to know the name of the table you want to use.



Access

To use an Access database as the data source for a mail merge, in the Mailings ribbon, choose Select Recipients ➪ Use Existing List. In Select Data Source, set Files of Type to Access Databases or to Access 12 Database, whichever is appropriate. Navigate to the folder where the file is located, click it, and then click OK. Note that there is no intermediate step. You're now ready to proceed with setting up your data document.

HTML Files

When working with HTML files as data sources, note that they cannot reside on the Internet. You must first save the file to your local hard drive (or at least somewhere on your LAN or in your workgroup).

In addition, using HTML files as data sources almost never works unless the data has been carefully formatted. For best results, the data should be in a table and should contain a header row.

Once the data file is ready, so are you. In the Mailings ribbon, choose Select Recipients ➪ Use Existing List. In Select Data Source, set Files of Type to Web Pages. Navigate to where the file is located, click it, and then choose Open. Unless there are problems, you are ready to proceed.

A common problem occurs if Word can't recognize a consistent data pattern in the file. If Word prompts you about how the data fields and records are delimited, you might need to examine the file to see. Open the file using Office ➪ Open, and press Ctrl+Shift+8 to display nonprinting marks. If you can identify the delimiters, then close the file and try again to connect to it from the Mailings ribbon.

Another problem occurs when the data source is inconsistently formatted, such as when some rows (records) contain different numbers of columns (data fields). When that happens, the file is ostensibly attached okay, but when you click Edit Data Source to verify that the data set is correct, you might see an error like the one shown in Figure 41-11. Unfortunately, when this happens, the only recourse might be to edit the file to fix the problem, which ultimately means that the original data source is probably not going to be a reliable source of additional data or updates.

FIGURE 41-11

Word flips out when different data records contain different numbers of data fields.



Summary

In this chapter, you've learned about data considerations when preparing a data document in Word. You now know how to connect a variety of data sources to Word and are aware of the kinds of information you will need and decisions you will have to make when responding to various prompts from Word. You also now know of a dozen or more different kinds of data you can connect to a Word data document. You should now be able to do the following:

- Create a new data source, and customize it for entering information other than simple address data
- Associate data contained in a Word file with a data document
- Use Outlook contacts as a source for mail merge data
- Attach HTML, Access, Excel, and other data files to a Word data document

CHAPTER 42

Envelopes and Labels

This chapter looks at envelopes and labels. Word provides tools to facilitate printing both envelopes and labels, and it can be as simple as clicking just a few tools, typing an address, and clicking Print. Word can print directly to envelopes and labels, and it can add an envelope to a letter so that you can print new envelopes as needed (for example, when you have recurring correspondence with a recipient). Similarly, you can print directly to labels using Word's tools, or you can save the labels to a file. This can be useful when you have recurring needs — such as sending mail to a membership or employee roster — especially when the underlying database doesn't change often.

IN THIS CHAPTER

Printing envelopes on-the-fly

Saving envelopes as part of a letter

Envelope address styles

Built-in and custom labels

Envelopes

Word's Envelope addressing tool is available from the Mailings ribbon, in the Create section, shown in Figure 42-1. Before you click the Envelope tool, however, if the current document contains the address, you often can save yourself some work by selecting it and copying it to the Clipboard.

If you're feeling lucky, type or paste the delivery address and return address and click Print. You'll get correct results more often than not, but it's the "not" part that ends up wasting envelopes. For help with Word's behavior and various options, keep reading.

FIGURE 42-1

Feeling creative? Click Envelopes to address an envelope.

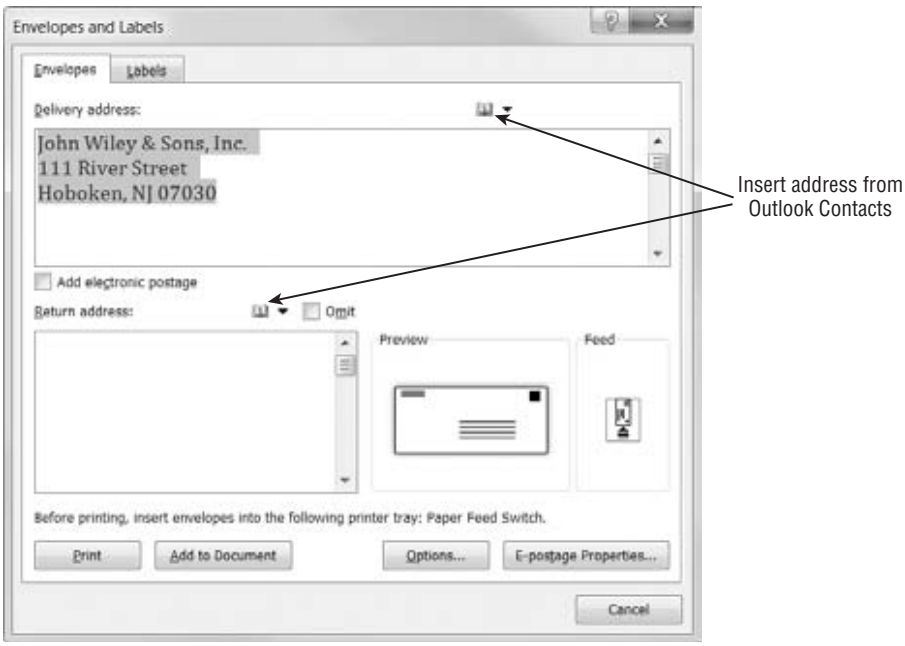


Delivery Address

With an address selected, when you click the Envelope tool, Word (usually) copies the selection into the Delivery address field. Why usually? Because sometimes Word is contrary and decides to copy something else to the Delivery address field. If nothing is selected, Word will try to guess where the address is, and often gets it right. The more complex the document (usually a letter), however, the worse Word's guesses are. For best results, pre-select the address and copy it to the Clipboard. If Word's guess is right, fine. If not, you can overrule Word and paste the contents of the Clipboard into the Delivery address field, shown in Figure 42-2.

FIGURE 42-2

Sometimes Word correctly guesses the address.

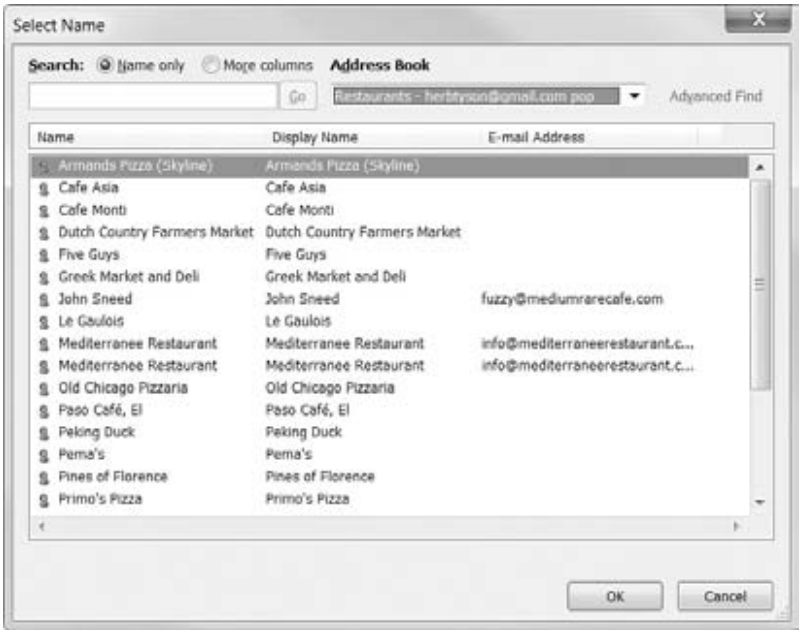


If you don't already have the address in the document you're writing, but it is in your Outlook contacts list, you can insert an address from your contacts list using the Insert Address tool. If you've previously inserted an address using this tool, the names of addressees previously used will be listed when you click the drop-down arrow.

Otherwise, click the Insert Address tool to display the Select Name dialog box, shown in Figure 42-3. With Search: (Fig. 42-3) Name only selected, the dialog box displays names that begin with the characters you type (under Search). With the Name only option selected, the Go button is never available. To search all data fields, select More columns. Type your search text and click Go. The Select Name dialog box displays the results in the same list. When you find the address you want, double-click it to copy it to the Delivery address field.

FIGURE 42-3

You can use addresses from your Outlook Address Book.

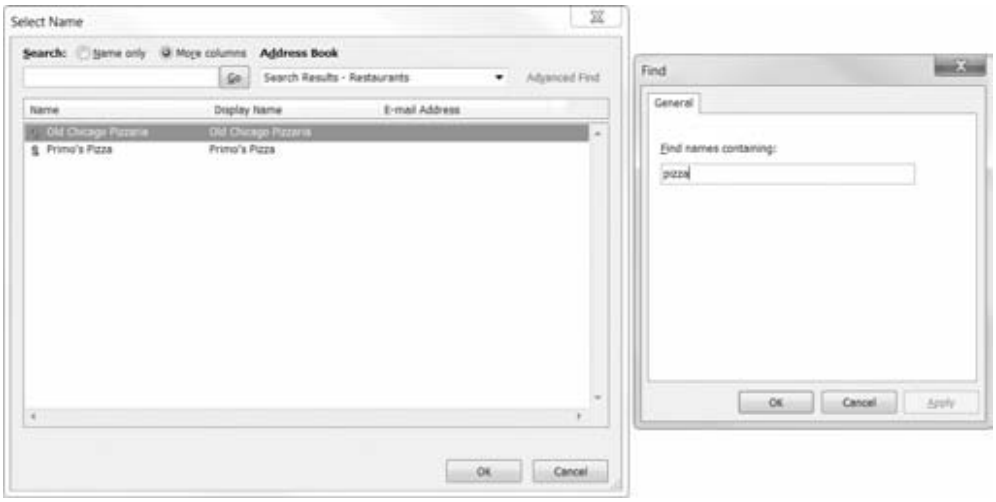


Advanced Find

The Advanced Find feature is a variation on the Name only search option. Whereas the Name only search option searches just the first letters of names in the Name field, Advanced Find summons the Find dialog box, shown in Figure 42-4. This feature enables you to search the entire Name field. For example, if your Name list begins with first names, you might need to resort to Advanced Find to locate everyone who has the same last name.

FIGURE 42-4

Click Advanced Find to search for any string contained in the Name field.



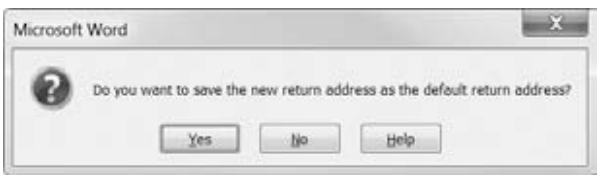
Return Address

By default, for Return address, Word uses the address provided in File ➪ Options ➪ Advanced tab ➪ General section ➪ Mailing address. If you plan to print a lot of envelopes from Word, you can save time in the long run by filling in your complete address there. Note that Word won't automatically add your name from the Popular tab in the Word Options dialog box. If you want it included in the Return address field, you should include it in the Mailing address field.

Alternatively, you can use an address from your Outlook contacts, as described earlier in the "Delivery Address" section. Or, you can type an address or paste one in from the Clipboard. If you modify the Return address field in any way (that is, from the way it's supplied from the Advanced tab's Mailing address field), Word prompts as shown in Figure 42-5. Although Word doesn't indicate this, clicking Yes to the prompt automatically copies this address to the Mailing address field in the File ➪ Options ➪ Advanced tab, so don't say yes if you're printing an envelope for somebody else who just happens to be visiting.

FIGURE 42-5

If you select Yes here, Word transfers this address to the Mailing address field in the Advanced tab in Word Options.



Options Button

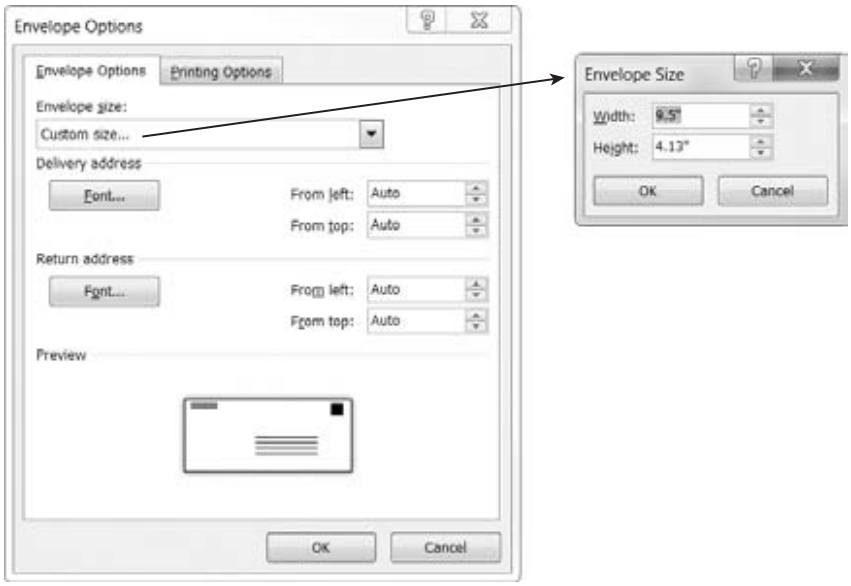
Use the Options button to make changes to the way Word formats and positions text on the envelope (including envelope size), as well as how Word prints the envelope.

Envelope Options

Use Envelope Options, shown in Figure 42-6, to set the envelope size and to adjust the Delivery and Return address fonts and positions on the envelope. Word provides more than two dozen different preset standard envelope sizes. However, if you have something nonstandard, set Envelope size to Custom size to choose a different width and height, also shown in Figure 42-6.

FIGURE 42-6

If Word's built-in list of 25 envelope sizes doesn't include yours, choose Custom size to specify something different.



To change the fonts used for the Delivery or Return addresses for *this envelope only*, click either of the Font buttons and make your changes. You can also change the position of both of the addresses by specifying the distance from the left and top. Choosing Auto leaves everything up to Word, which has preset distances based on the envelope size selected.

Changing the Default Envelope Formatting

Though Word doesn't let you change the default fonts for the Delivery and Return addresses using the font options shown previously, you can change them by modifying two styles. The methods for fully changing the Return address and Delivery address styles are different, however.

To modify the Return address style, follow the instructions in "Add to Document" later in the chapter to add the envelope to the current document. Strictly speaking, this isn't essential, but it makes gaining access to the address style more straightforward. You can delete the envelope from the document once you've modified the style.

After the envelope has been added to the document, click in the Return address and press Ctrl+Shift+S to activate the Apply Styles task pane, and note that the Envelope Return style displays under Style Name. In the Apply Styles task pane, click Modify. In the Modify Style dialog box, use the settings provided to change the Return address style as needed. When you're done, enable the "New documents based on this template" option, and click OK.

If you want to change just the font or other formatting of the delivery address itself, the process just described will work. However, it will not let you save changes to the position of the delivery address. Did you notice that the delivery address is inside a frame, and that the frame can be used to position the delivery address? Thanks to this clever device, if you want to change the default position of the delivery address, a different method is needed.

Display the Envelopes tab in the Envelopes and Labels dialog box, and ensure that an address is contained inside the Delivery address box. Click Options. Using the Delivery Address Font control, change the font settings as desired. Use the From left and From top fields to set the position to the desired location on the envelope. Click OK when you're done.

Back in the Envelopes tab, click Add to Document to add the envelope to the top of the document (you can zap the envelope when you're done, but you need it for now). In the Developer ribbon, choose Document Template ➪ Organizer. In the Organizer's Style tab, in the left panel, it should display at least some of the styles in the current document. On the right, it should show the current document's template. Click Envelope Address in the current document's listing of styles, and then click Copy to copy that style to the template. If prompted, confirm that this is what you want to do, and then click Close.

If prompted later to save changes to the underlying template, don't forget to say Yes. Now any envelopes you create in the future in documents based on that template will use your new Delivery address settings.

Printing Options

The other tab in the Envelope Options dialog box is for Printing Options, shown in Figure 42-7. Note that you can also get to the Printing Options tab by double-clicking Feed in the main Envelopes tab of the Envelopes and Labels dialog box. Choose the options you need, set the Feed from source, and click OK.

Add Electronic Postage and E-Postage Properties

If you installed electronic postage software, you can add electronic postage by clicking the Add electronic postage option, and adjust your options using E-postage Properties. Different software

packages feature different options. If you don't have electronic postage software, you'll see the message box shown in Figure 42-8.

FIGURE 42-7

Word provides a wide range of positioning options for printing envelopes.



FIGURE 42-8

Word knows whether or not you've installed electronic postage software!



Add to Document

Use the Add to Document option if you want to save an envelope with a letter or other document. For example, suppose you routinely send an invoice once a month, and you're in the habit of using last month's invoice as a template for this month's. If you add the envelope the first time, you won't have to go through the envelope-creation process each time. If your printer

trays are flexible, in fact, you can save additional work by having the envelope and letter print to different trays.

The Add to Document option is also useful if you want to change the default formatting (as shown earlier in the "Changing the Default Envelope Formatting" section), or even if you simply want to preview the envelope before committing it to paper.

Labels

Word offers a wide variety of different label options that work with hundreds of labels from a number of different manufacturers. If you can find the box of labels in the office supply store, there's an excellent chance that Word's vast label repertoire can handle it. In those rare cases when you need a label Word has never heard of, there's an excellent chance that it has one that matches the dimensions. Even when that high probability isn't met, you can still use the custom label feature to create one that works.

To begin the process, click the Labels tool in the Mailings ribbon to display the Labels tab of the Envelopes and Labels dialog box, shown in Figure 42-9. If the current document contains something that Word thinks is an address, it will use that address in the Address field. Type or paste the address in the Address field as needed. Or, if you're creating return address labels, click to enable Use return address. If you've included your address in the Mailing address field in the Advanced tab in Word Options, Word replaces the Address in the main block with your stored address.

Caution

Users often are confused by the Use return address option, thinking that it's a way to tell Word to use a return address in addition to a delivery address. Instead, this option tells Word to use your return address rather than a delivery address. If you want both return and delivery addresses, you'll need to use the New Document option, described a little later in this chapter, and manually edit the contents of the label table once the Envelopes and Labels dialog box has finished its appointed mission. ■

Print Options

As shown in Figure 42-9, Word can print a full page of the same label, or it can print a single label. What about a full page of different addresses? That's a different story and one that gets told in Chapter 43, because it requires using mail merge techniques and an associated database.

If you choose the Single label option, Word lets you specify which row and column. If you're careful, you can print a single label from a sheet, use the next slot over for the next label (for example, at a later time), and so on. This helps you avoid wasting labels.

FIGURE 42-9

The word ''Labels'' doesn't even begin to touch on the full range of Word's Labels feature.



Options (Label Type)

To select the label type, click the label icon in the Label section, or click the Options button. Both display the Label Options dialog box shown in Figure 42-10. Under Printer information, select the type of printer you have. Though you might not have seen a tractor feed or continuous feed impact printer or matrix printer in the past ten years or so, they do still exist. Many shipping companies still use them precisely because they are an efficient way of having thousands of labels at the ready. Chances are good that most Bible readers, however, have single-sheet–oriented printers (which covers most laser and inkjet printers).

Under Label information, choose the label vendor, and then select the product number for the labels you are printing. Note that the size information is shown under Label information.

For additional information, as well as to modify the label if the default settings don't meet your needs, click the Details button to display the dialog box shown in Figure 42-11. Notice that when you change any of the settings, the Label name, which begins as grayed out, suddenly becomes available for editing. Type a new name. If you're using a given label, it's not a bad idea to make the new name a variation of the built-in name. If you know from the outset that you're going to create a custom label, you can use the New Label button instead of Details.

FIGURE 42-10

In Label Options, you can select any of literally hundreds of different labels.

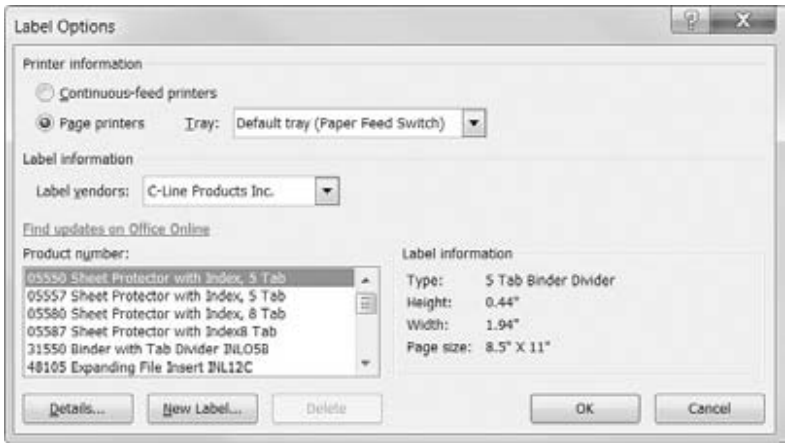
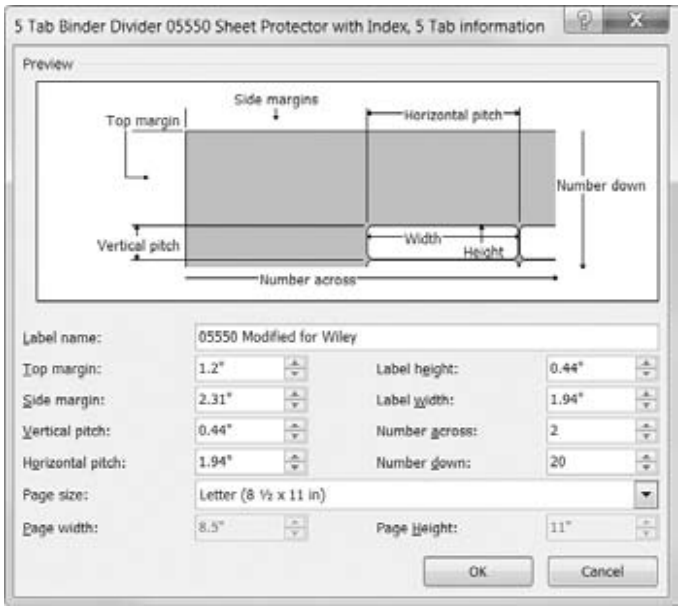


FIGURE 42-11

It's easy to modify a label's settings.

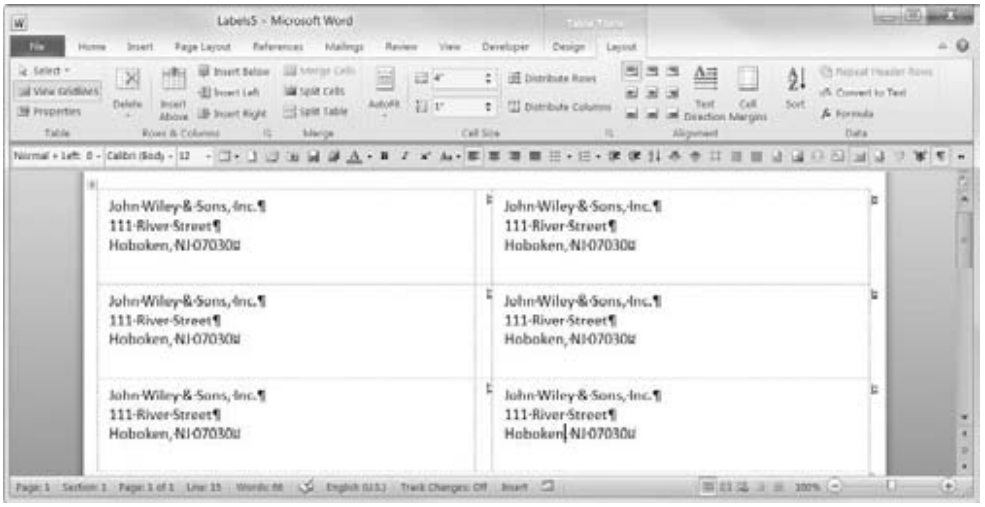


New Document

Use the New Document option to save the chosen labels and any contents in a new document. This is where you learn, if you didn't know it already, that the label feature relies heavily upon Word's table formatting, as shown in Figure 42-12. To make it perfectly obvious that this is a table, it might be necessary to turn on gridline display as well as nonprinting formatting marks. To turn on gridlines, in the Table Tools Layout ribbon, click View Gridlines. To turn on nonprinting formatting marks, press Ctrl+Shift+8. Now both gridlines and cell markers should be visible.

FIGURE 42-12

When you insert a page of labels, the Table Tools ribbons become available.



Note

As shown in Figure 42-9, when Single label is selected, the New Document option is grayed out as unavailable. That's because the option doesn't make sense for a single label. ■

If you want to use multiple addresses on a sheet, this is the first step. You can, of course, type the addresses into the table cells shown. Or, you can convert the current file into a data document (a la mail merge), associate a data file with it, and populate the cells with Word merge fields. See Chapter 43 for the exciting details.

Tip

Rather than go through the steps of creating a new sheet of labels each time you need to print some, you can either save a labels document as a template or save the label table as a Quick Part or a Building Block. See Chapter 13 if you need a refresher course on saving Quick Parts or Building Blocks. ■

Summary

In this chapter you've seen how to create envelopes and labels. You now know how to modify the address styles that Word uses when addressing envelopes. You also have an inkling of the kind of logic Word uses when trying to guess whether something you've typed is an address. You should now be able to do the following:

- Print a single label
- Save a sheet of labels or an envelope for future use
- Customize and name a label for future use
- Store your return address so that Word doesn't have to ask

CHAPTER 43

Data Documents and Mail Merge

IN THIS CHAPTER

- Attaching a data source to a data document
- Editing data
- Assembling a data document
- Merging to a printer
- Using the Mail Merge Wizard

Let's face it. The term *mail merge* is entirely too narrow to fully reflect the range of what can be done using Word's "mail merge" features.

Setting up a mail merge or data document involves a number of steps, some of which must be done before others can happen:

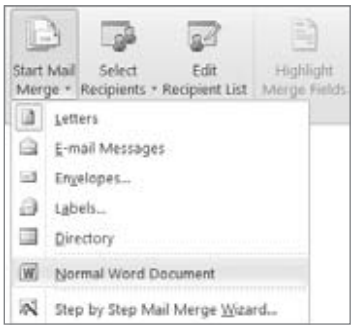
1. Set the document type: letter, e-mail, envelope, labels, and directory.
2. Associate a data source with the document: new, Outlook contact, or some other source.
3. Design your data document by combining ordinary document features with Word merge fields.
4. Preview the finished document by testing to see how it looks with different data records.
5. Finish the process by merging the data document with the data source, creating a printed result, a saved document, or an e-mailed document.

Choosing the Type of Data Document

To choose the type of data document, in the Mailings ribbon, click Start Mail Merge, as shown in Figure 43-1. Some of the options are obvious, others are not. There are basically two kinds of data documents you can design. For one kind, each data record (a set of data items or fields describing a person, company, product, and so on) will result in a single document, such as a form letter, a mass e-mail, a product specification sheet, or an invoice. For the other kind, a single document is produced in which multiple records can appear on any given page. This approach is needed for creating directories, catalogs, and sheets of labels.

FIGURE 43-1

Letters, e-mail messages, and envelopes use one record per output document, while labels and directories use multiple records for each output document.



Contrast, for example, using an envelope (with a different address on each envelope) with using a sheet of labels (with a different address on each label). If you have only one address and want to print only one envelope or label, you don't need a data document. All you need are the procedures described in Chapter 42. When you plan to crank out stacks of envelopes, each with a different address, or sheets of labels for which no two contain the same information, you need the approach described in this chapter.

As shown in Figure 43-1, Word offers five flavors of the two basic types of data documents:

- **Letters:** Use this option for composing and designing mass mailings for which only the recipient information varies from page to page. Use this approach too when you're preparing sheets containing product or other item specifications with one piece of paper per product or item. You might use this approach, for example, not only when sending out a form letter or invoices, but also when producing a job manual wherein each page describes a different job title, and job information is stored in a database.
- **E-mail Messages:** This is identical in concept to the form letter, except that it is geared to paperless online distribution. Contrast this with using multiple e-mail addresses in the To, Cc, or Bcc field. Using E-mail *merge*, each recipient can receive a personalized e-mail. Using multiple addresses, each recipient receives the identical e-mail.
- **Envelopes:** This is also identical in concept to the form letter, except that the resulting document will be envelopes. As a result, when you choose this option, Word begins by displaying the Envelope Options dialog box.
- **Labels:** Use this option to print to one or more sheets of labels. This combines Word's capability to print to any of hundreds of different label formats, as shown in Chapter 42, with the capability to associate a database with a document, printing many addresses (data records) on the same page, rather than the same address on each label.
- **Directory:** This is similar in concept to labels, in that you print from multiple data records on a single page. Use the directory approach when printing a catalog or any other document that requires printing multiple records per page.

To choose the kind of document, choose Start Mail Merge in the Mailings ribbon, and click the kind of document you want to create.

If you want step-by-step guidance through the process, note an additional option at the bottom of the Start Mail Merge list — Step by Step Mail Merge Wizard. Use this option if you're unfamiliar with the mail merge process. The Mail Merge Wizard process is described later in this chapter.

Restoring a Word Document to Normal

Sometimes, either by accident, temporary need, or whatever, a Word document becomes associated with a data file, and you want to restore a document to normal non–mail-merge status. To restore a Word document to normal, in the Mailings ribbon, choose Start Mail Merge ➪ Normal Word Document. Note that when you restore a document to normal status, a number of tools on the Mailings toolbar that were formerly available are now grayed out as unavailable. If you later decide that you need to again make the document into a data document, you will need to reestablish the data connection.

Tip

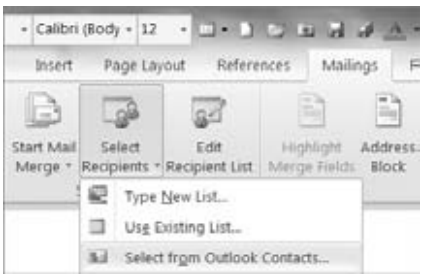
If there's a chance that you'll later need to restore a data connection, and if document storage space isn't a concern, rather than break the data connection for a document, save a copy of the document, giving it a name that lets you know that it has a data connection. Though establishing a data connection isn't all that difficult or time-consuming, you can usually save some time and guesswork by not having to reinvent that particular wheel. ■

Attaching a Data Source

In Chapter 41, you saw how to attach a variety of data sources to a data document. With the Mailings ribbon showing, use the procedures described in Chapter 41 to create a new data source or to connect to an existing source. From the Mailings ribbon, choose Select Recipients, as shown in Figure 43-2.

FIGURE 43-2

A document isn't really a data document until you attach a data source to it using one of the Select Recipients options.



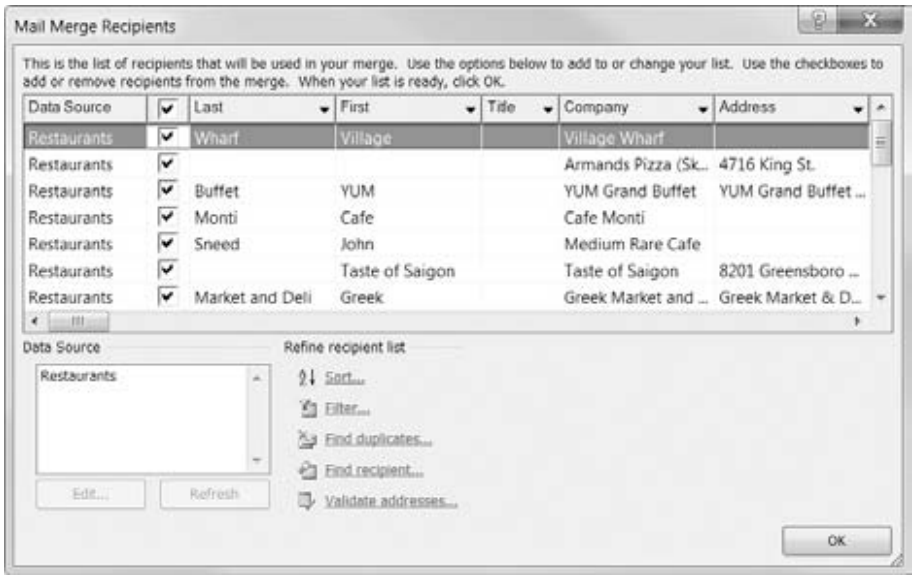
Note that once you've attached a data source to the document, Edit Recipient List and a number of other tools on the Mailings ribbon are no longer grayed out. If you plan to use the entire database, you can skip the following section.

Selecting Recipients

If you don't plan to use the entire database, you can use the Mail Merge Recipients dialog box, shown in Figure 43-3, to select just the recipients you want to use. Use the check boxes shown to include or exclude records. To quickly deselect all records, clear or select the check box at the top of the list, just to the right of Data Source.

FIGURE 43-3

Select just the target recipients using the Mail Merge Recipients dialog box.



Editing Data

Depending on your data source, you sometimes can edit it by clicking the database in the Data Source box and then clicking Edit. When your data source is Outlook contacts, note that Edit is not an option. To change your Outlook data, you must use Outlook. Once you've made your change in Outlook, you can then refresh the records you see in the Mail Merge Recipients list by highlighting the data source and clicking Refresh. See Chapter 41 for more information on editing data sources.

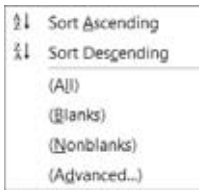
Sorting Records

When editing non-Outlook data, you can sort using Word controls. Click the arrow next to a field to drop down a list of sort options, shown in Figure 43-4. For example, if you want to

filter out records for which company name is blank, click the Company drop-down arrow and choose Blanks. To select only records for which the e-mail address is *not* blank, click Nonblanks. To restore the list to show all records, choose the All option.

FIGURE 43-4

Quickly select records for which the current field is blank or nonblank by choosing Blanks or Nonblanks.



To sort by multiple fields at the same time, in the Mail Merge Recipients dialog box, choose Sort under Refine recipient list. This displays the Filter and Sort dialog box, shown in Figure 43-5.

FIGURE 43-5

You can sort by up to three fields.



Use this dialog box to sort by multiple criteria. For example, if letters are being hand-delivered within a company, it might be useful to sort by floor and then by room number, assuming those are separate fields. (Often, sorting just by room number accomplishes both at the same time.)

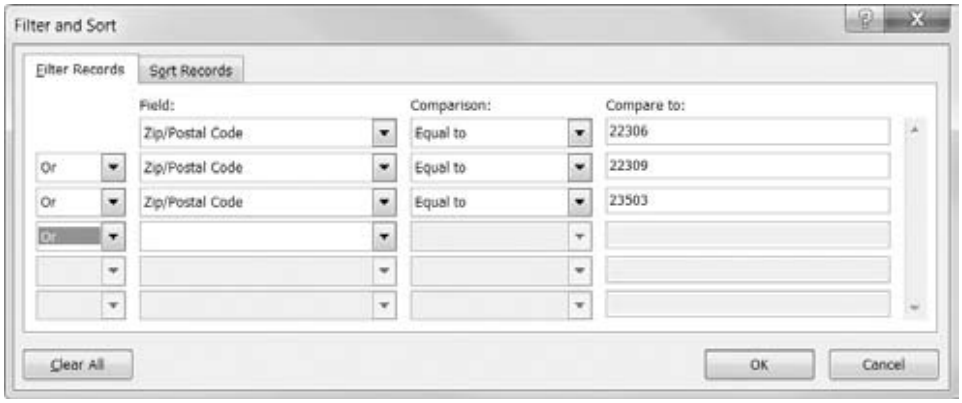
Filtering Records

Word also enables you to filter records to either include or exclude records with data fields matching specific criteria. To filter records, click Filter under Refine recipient list. Here, you again get the Filter and Sort dialog box, but the Filter Records tab this time, as shown in

Figure 43-6. Use the options shown to filter by specific values. As shown here, you can use it to include specific Zip codes. Although the dialog box initially shows just six filter fields, you are not limited to that many. It's not clear what the upper limit is, but you can specify 94, I'm told. I stopped at 45.

FIGURE 43-6

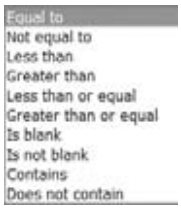
You can specify multiple filter criteria.



Though the dialog box shown in Figure 43-6 shows just the Equal to comparison, you can make a total of ten comparisons (see Figure 43-7).

FIGURE 43-7

Include records based on ten comparison operators.



Tip

When filtering by Zip code, if your database contains nine-digit Zip codes, use the Contains filter rather than the Equal to filter. Using Equal to, you would need to specify all nine digits in the filter, and specifying as many as 9,999 different filters doesn't seem like a productive use of your time. ■

Understanding And and Or

When setting up filters, you can make two kinds of comparisons: *And* and *Or*. If all we had were one or the other, there would be no problem, but we have both, and we don't have parentheses to help clarify the comparisons.

It helps to understand that *and* and *or* apply to each pair of rules. You also need to understand that the *and* rule is harder to satisfy, in that it requires that two conditions be met. Depending on what comes before or follows, each and/or effectively divides the list of filters into sets of filters that are being evaluated. However, by being careful with filters, you can avoid combinations that are impossibly difficult to understand.

Suppose the filters contained the comparisons shown in Table 43-1. The first *And* applies to the Alexandria and VA filters. The second *And* applies to the Hampton and VA filters. This set of filters requires that records must be in Alexandria, VA, *or* in Hampton, VA.

Finally, understand that it's perfectly possible to set up filters that make no logical sense. Hence, Table 43-1 could have been set up with all of the Operators set to *And*. There would be no matching records, of course. It's up to you to examine the collection of resulting data records to make sure that your logic is being applied as you think it should be.

TABLE 43-1

Understanding Or and And Operators

Operator	Field	Comparison	Compare to
	City	Equal to	Alexandria
And	State	Equal to	VA
Or	City	Equal to	Hampton
And	State	Equal to	VA

Duplicates

Databases often contain duplicate records. When mailing or e-mailing, especially, you want to avoid sending the same person duplicate messages. When sending invoices to large companies, this can cause problems, especially if they are received and processed by different people, resulting in double payment, and further paperwork downstream.

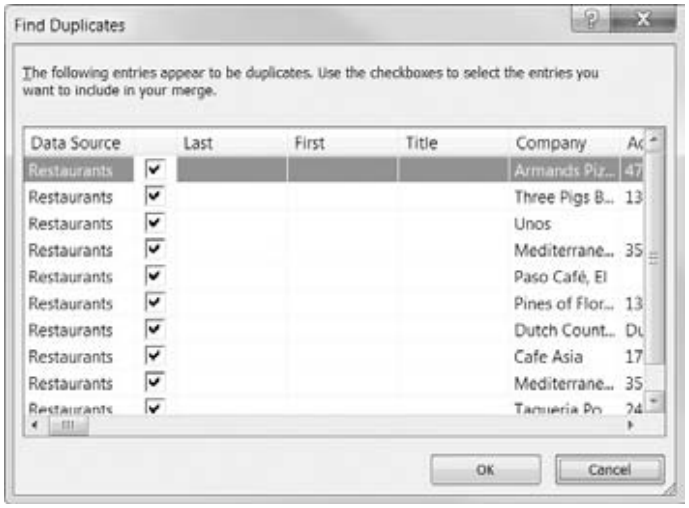
To find duplicates, click the Find duplicates link in the lower section of the Mail Merge Recipients dialog box. Word now displays the Find Duplicates dialog box, shown in Figure 43-8. If you identify duplicates, remove the checks next to them to exclude them from the data merge. Look carefully, however, because Word's criteria for what constitutes a duplicate might be different from your own.

Caution

Caveat duplicates! In Figure 43-8, Word identified ten entries as duplicates, which they clearly aren't. Word uses First and Last name to identify duplicates. If your database contains only company names and no First and Last name fields (which isn't unexpected when all you have is the name of the establishment), you cannot use this feature to reliably identify duplicates. ■

FIGURE 43-8

Beware of Word's ability to find duplicates. Some ''duplicates'' aren't duplicates at all!



Find Recipient

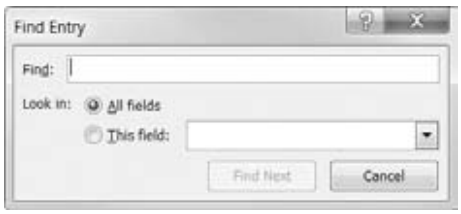
If your database is especially large, using Find recipient can be faster than pawing through the listings manually. Click the Find recipient link in the lower portion of the Mail Merge Recipients dialog box to display the Find Entry dialog box shown in Figure 43-9. Alternatively, click the Find Recipient tool in the Preview Results section of the Mailings ribbon.

Type the search text in the Find field, choose All fields or a specific field, and then click Find Next. Note that the search is not case sensitive. If there are matches, Word highlights the first match in the Mail Merge Recipients dialog, and the Find Entry dialog box stays onscreen. Click Find Next to move to successive matches in the database.

Return to this tool later, after your data document has been constructed, to preview specific data records. It's better to iron out problems before committing your merge to paper or e-mail.

FIGURE 43-9

Use Find Entry to search for text in any or all data fields.



Validate Addresses

The Validate addresses link works with third-party software, such as that provided with stamps.com and other electronic postage services. If you don't have such software installed, you'll see the message shown in Figure 43-10. These services vary, but basically they check against a huge database of valid street addresses to determine whether the selected address and Zip code combination really exists. This can save considerably on costs, because it can prevent you from mailing to addresses that might actually be somewhere in the middle of a lake (if the street were extended to where an address logically would fall). Unless you are targeting fish, you might find having such a capability handy.

FIGURE 43-10

If you don't have address validation software installed, Word invalidates your attempt to run the Validate address command.



Assembling a Data Document

Regardless of which data document type you choose (letter, e-mail, envelopes, labels, or directory), the process is similar. There are some additional considerations for multi-record-per-page documents, however, so we will look at those separately after discussing the common elements.

When designing a letter or e-mail you plan to send to multiple recipients using the merge feature, it's often a good idea to draft the document as you want it to appear, using placeholders for information pertaining to the intended recipient, as shown in the following example:

Dear [name]:

We are writing to inform you that the warranty for:

[product]

which you purchased on:

[purchasedate]

will expire on [expirationdate].

If you would like to extend your warranty, you must take advantage of our extended warranty coverage plans before [expirationdate]. Costs for extending the warranty are:

1 Year: [oneyearwarranty]

2 Years: [twoyearwarranty]

3 Years: [threeyearwarranty]

Please use the enclosed card and envelope to extend your warranty before it's too late!

Yours truly,

[salesagent]

When you're done, edit your document and substitute *merge fields* for the placeholders.

Merge Fields

After setting the data document type (using Start Mail Merge), associating a database with it (using Select Recipients), narrowing the list of recipients or records just to those records you plan to use, and drafting the data document, the next step is to insert *merge fields* into your document where you want the corresponding data fields to appear.

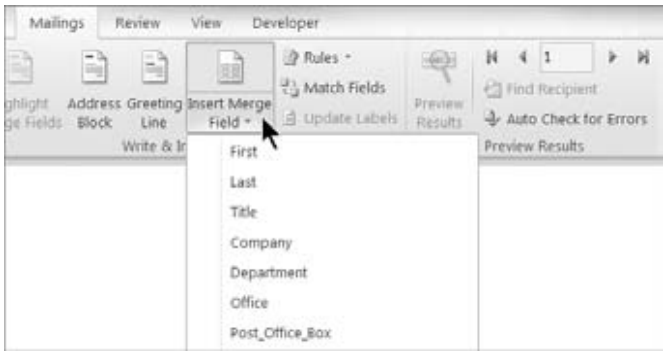
Note

Merge fields are special Word fields that correspond to the data fields in your database. For example, if you have a data field called Company, then you would insert the company name into your data document by using a MergeField field code with the name Company in it: { MERGEFIELD Company }. In your data document, that field displays either as «Company» or as the name of the company associated with the current record in the data set. Use the ribbon's Preview Results button to toggle between the merge field name and actual data. ■

To insert a merge field, position the insertion point where you want the field to appear (or select the placeholder if you're replacing a placeholder with a merge field). From the Mailings ribbon, choose Insert Merge Field, as shown in Figure 43-11. Click the field you want to insert. Using a combination of text and merge fields that you insert, complete the assembly and wording of your document. Note that in addition to individual merge fields that you can insert using the Insert Merge Field tool, you can use special sets of merge fields to save time: Address Block and Greeting Line.

FIGURE 43-11

Merge fields are data tokens that you use where you want actual data fields to appear in the data document.



Address Block

The address block contains a number of elements that you can select from the Insert Address Block dialog box. To determine the contents of the address block, click Address Block in the Mailings ribbon, as shown in Figure 43-12.

FIGURE 43-12

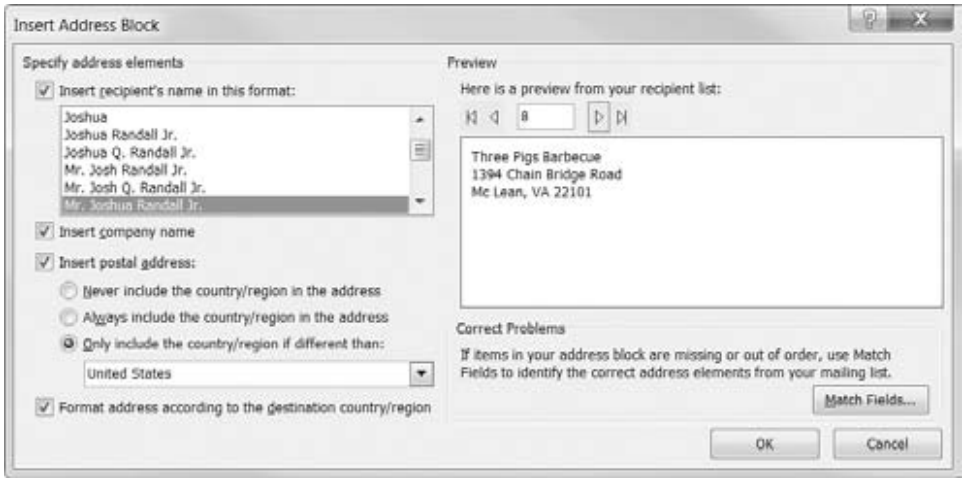
Use the Address Block tool to launch the Insert Address Block dialog box.



When you click Address Block, the Insert Address Block dialog box, shown in Figure 43-13, appears. Notice that it contains three sections for selecting, previewing, and correcting your address block information (if there are problems). Make your selections as indicated, and then click OK.

FIGURE 43-13

Use the Insert Address Block dialog box to choose the address block elements for the current data document.



- **Specify address elements:** Use this section to tell Word how to define the address block. You can include the recipient's name (in a variety of formats), the company name, the

postal address, as well as the country or region. If desired, you can suppress the country or region, always include it, or include it only if it's different from the country selected. You can also tell Word to format the address according to the destination country or region.

- **Preview:** Use the First, Previous, Next, and Last buttons to preview different addresses as they will appear with the selected options. It's a good idea to preview a good sampling in case some parts of the address are treated differently from how you expect, or if there are problems with missing data that will leave "holes" in the address block. (Click Preview Results if you see merge field names instead of data.)
- **Correct Problems:** If the preview isn't what you expect, click Match Fields to change the different data elements with which each of the fields listed is associated, as shown in Figure 43-14.

If you plan to reuse the address block data either for the same database or for other databases that contain the same field names, click to enable the "Remember this matching . . . " setting.

FIGURE 43-14

Use the Match Fields dialog box to associate each of 11 items with data fields from your database for the Address Block.



Greeting Line

The Greeting Line merge field, like the Address Block field, is a collection of different data elements and plain text designed to save you entry time when composing data documents. Click Greeting Line in the Write & Insert Fields section of the Mailings ribbon. This displays the Insert Greeting Line dialog box shown in Figure 43-15. Proper operation of a number of aspects of the greeting line merge field depends upon your having several potentially obscure data elements available and filled out, such as nickname, spouse's nickname, and the color of their

children's socks. Unless you or someone with whom you work is obsessively compulsive about data entry, you're not likely to find some aspects of this terribly useful.

FIGURE 43-15

Set and preview greeting line components.



Use the Preview buttons to test your selected greeting line options against your actual data. If something doesn't look quite right, click Match Fields and use the controls shown in Figure 43-16 to associate the Greeting Line components with the correct merge data fields.

FIGURE 43-16

Use the Match Fields dialog box to associate Greeting Line merge field components with data elements from your database.

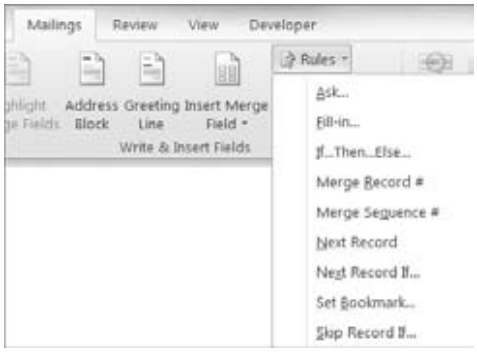


Rules

In assembling a data document, you sometimes need to control or modify how data and records are processed. Word provides nine commands to help you do that, as shown in Figure 43-17. The entries shown in the Rules drop-down box show how those rule keywords are displayed in the data document.

FIGURE 43-17

Use the Rules drop-down list of Word fields to control how data is merged with the data document.



As described in Chapter 21, these rules are tied to specific Word field codes, and are explained in Table 43-2. Note that many of these are supported by dialog boxes that guide you through proper syntax, making them easy to use and understand.

TABLE 43-2

Merge Rules

Field	Usage/Purpose
ASK	This field prompts you to provide information and assigns a bookmark to the answer you provide; the information is stored internally. A reference to the bookmark can then be used in the mail merge document to reproduce the information you type. A default response to the prompt can also be included in the field. The ASK field displays as an empty bookmark in the mail merge document. You might use this field in conjunction with an IF field to prompt for missing information during a merge.
FILLIN	This field prompts you to enter text, and then uses your response in place of the field in the mail merge document. This is similar to the ASK field, except that the information can be used only in one place.
IF	This is used in mail merge documents to control the flow and to create a conditional statement that controls whether specific mail merge fields are printed or included in the merged document.

Field	Usage/Purpose
MERGESEQ	This field provides a counter of mail merge documents that actually result from a merge. If you merge the entire database and do not change the base sorting, and if no records are skipped, then MERGESEQ and MERGEREC will be identical.
MERGEREC	When doing a mail merge, the MERGEREC field serves as a counter of records in the data file and doesn't count the number of documents actually printed. This field is incremented by the presence of NEXT and NEXTIF fields. If you skip records using SKIPIF, MERGEREC is incremented nonetheless.
NEXT	The NEXT field is used to include more than one record in a given document. Ordinarily, when doing a mail merge, one document is printed for each record. With the NEXT field, however, you can include multiple records in a single document. This can be useful when you need to refer to several addresses from a data file. When doing a label merge, the NEXT field is provided automatically, and appears as «Next Record».
NEXTIF	The NEXTIF statement works like the NEXT field except that it advances to the next record only if an expression being evaluated is true. A typical use is to skip a given record if a particular key field is blank. For example, in an e-mail merge, if you haven't otherwise excluded records with blank e-mail addresses, you can use NEXTIF to do it.
SET	The SET field is used to change the text referred to by a bookmark. SET often is used in conjunction with IF to conditionally change how particular text is defined based on external factors, such as the current date, or internal factors, such as the value(s) of particular fields.
SKIPIF	The SKIPIF field is used to cancel processing of the current database record during a mail merge. For example, you might use it to screen out a particular Zip code.

Match Fields

The Match Fields tool displays the Match Fields dialog box shown in Figure 43-18. If the dialog box and fields look familiar, it's no accident. The "special features" notation referred to at the top of the Match Fields dialog box refers to the Address Block and Greeting Line. If you've already visited the Match Fields dialog boxes in those respective dialogs, you can forego the pleasure of another visit. In addition, if you aren't using Address Block and Greeting Line fields, you can safely ignore this tool.

Preview Results

At any time as you go along, if you want to see what actual data will look like in your document, click the Preview Results button to toggle between a data token (merge field name) and actual data, shown in Figure 43-19. Note that because the merge fields actually are field codes, they can also be displayed in a third way, also shown in Figure 43-19.

In the Preview Results section of the Mailings toolbar, shown in Figure 43-20, you can use the First, Previous, Next, Last, and Go To Record tools to display any data record.

FIGURE 43-18

When launched from the Mailings ribbon, the Match Fields dialog box is a marriage of the Match Field dialogs available from within the Insert Address Block and Insert Greeting Line dialog boxes.



FIGURE 43-19

Data merge fields can be displayed in three different ways in your document.

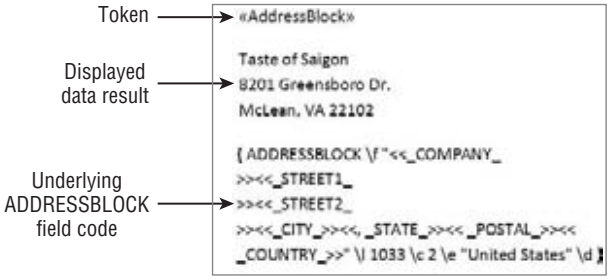
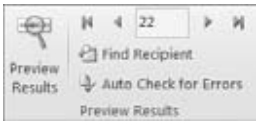


FIGURE 43-20

Use the Preview Results tools to ensure that the merge will produce the results you want.



Find Recipient

To search for a specific data record or for records whose data you want to preview, click the Find Recipient tool in the Preview Results group. This displays the Find Entry dialog box shown earlier in Figure 43-9. Refer to the discussion earlier in this chapter.

Update Labels

When the data document type is Labels, there are two ways to proceed. The easy way is to carefully edit just the first label cell by inserting whatever merge fields you need. When you're finished, click Update Labels. Word copies all text, merge fields, and formatting from the first cell into each of the other cells, after the Next Record control. The result is that each sheet of labels will contain data from the same number of label cells. A sheet containing nine labels will use data from nine database records.

The hard way to do labels is to ignore the existence of the Update Labels tool and to carefully edit each of the table cells, inserting the merge fields you want to use. Note that Word automatically provides the NEXT (Next Record) field in each of the table cells, as shown in Figure 43-21. If you manually populate the cells, additional merge fields should be inserted *after* the Next Record control. If you insert merge fields before the Next Record control, data from the same record used for the first cell will be used.

FIGURE 43-21

When you insert a merge field into the first label cell, Word automatically puts the Next Record control into each of the other cells.



Why would you choose to do it the hard way? You might do it that way if you need to do something else in each data field that can't be accomplished by Word automatically copying the first table cell to each of the other label cells. What might that be? Who knows? After all, they're *your* labels!

Highlight Merge Fields

Use the Highlight Merge Fields tool to highlight all of the merge fields in your data. This can be useful if you're working on a complex document and need to recheck the logic and placement of merge fields. This is especially true if you've turned on Preview Results and are looking at actual data results, rather than the merge fields themselves.

If, for example, you expect a given merge field result to appear in two places in the document, this tool enables you to find those locations more easily so you can verify that the correct text appears. If you're using conditional rules, such as Skip Record If, Next Record If, and If, this also helps you focus on the results so you can verify that the rules are working as expected.

Auto Check for Errors

To avoid wasting paper and other resources, when you think you're done, click Auto Check for Errors to display the options shown in Figure 43-22.

FIGURE 43-22

Rather than waste paper or send out errant e-mails, use the error checking tool to avoid logical errors or other unwanted surprises.



Options are as follows:

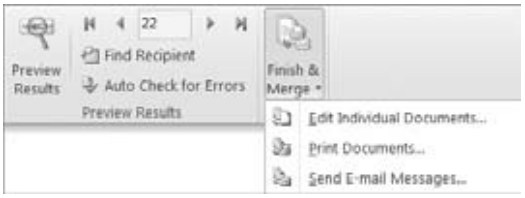
- **Simulate the merge and report errors in a new document:** Use this option to examine any and all errors in a new document.
- **Complete the merge, pausing to report each error as it occurs:** Use this option once you've determined that there are errors, so you can observe the error in action.
- **Complete the merge without pausing. Report errors in a new document:** Use this option to go ahead and complete the merge without stopping at each error, sending the error report to a new document.

Finishing the Merge

Once the data document is ready and has been thoroughly debugged and certified as error free, it's time to go through the final motions. The Finish & Merge tool provides three options, shown in Figure 43-23, *regardless of the type of data document chosen*. Think twice before accidentally clicking Send E-mail Messages if the document is a set of labels or a directory!

FIGURE 43-23

It's usually a good idea *not* to send a merge directly to a printer until the results have been thoroughly examined.



Edit Individual Documents

Use this option if you want to save your merged results for future use. For example, suppose you have a set of labels that seldom changes and which you need to print out every week. Rather than go through the mail merge exercise each week, save a copy of the labels and then print them each time you need them. That way, you don't need to go through the whole mail merge routine unless the underlying database has changed.

You might also choose this option if you don't trust other ways of proofing the results. Instead of printing from the Mailings ribbon controls, send the results to a new document where you can examine each of them, and then print when you're ready.

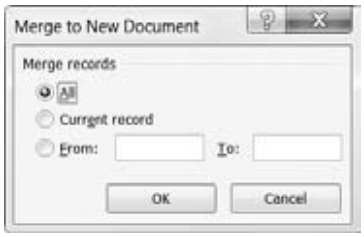
When you choose this option, Word displays the Merge to New Document dialog box shown in Figure 43-24. If you want Word to create a limited number of output documents, choose either Current record or indicate a From/To range. Click OK to commit those electrons to a Word window that displays your results.

Note

If you choose this option for an e-mail merge, the resulting document(s) will not be useful except for proofing the e-mails. To actually send the e-mails, you have to choose the Send E-mail Messages option. ■

FIGURE 43-24

Select the desired records to merge and click OK.



Print Documents

Choose this option when you're certain that the merge will give you the results you want, and your boss is at the door asking "Where are those letters?" When you click Print Documents, Word displays the dialog box shown earlier in Figure 43-24, this time sporting a Merge to Printer title bar. The same options prevail. Choose wisely and click OK to immediately . . . launch yet another dialog box, the Print dialog box. Make any additional choices and decisions, including which printer to use, cross your fingers, and click OK.

Tip

If you don't trust all of the previews and error checks at this stage, you've probably been burned by mail merge in the past. If you still want to be sure before wasting a tree, use the Name drop-down list to see whether you have an option that produces electronic images of printed pages, rather than actual printed pages. Using Office 2010 and Windows 7, you should at the very least see Microsoft XPS Document Writer, which is Microsoft's answer to PDF files. Then you can review what actually amounts to your best possible print preview. ■

Send E-mail Messages

Choose this option if you're working on an e-mail merge. When you click Send E-mail Messages, Word displays the Merge to E-mail dialog box, shown in Figure 43-25.

In addition to the Send Records options (All, Current Record, and From/To), Word provides three additional options:

- **To:** If the proposed e-mail address data field is not correct, used the drop-down arrow to replace it with the correct address field.
- **Subject line:** This is very important. Studies show that 73.4% of all non-spam e-mail merges sent omit the subject line. Don't become a statistic! Replace that blank Subject line. (This statistic was made up by the author. Nonetheless, don't send subjectless e-mails!)

- **Mail format:** Many e-mail recipients wisely have their e-mail options set up to read all e-mail as plain text (this gives them a shot at preventing any automatic naughtiness from being executed when e-mail is opened). Options provided are Attachment, Plain Text, and HTML, the latter being the default. Though Attachment seems like a good compromise for formatted e-mail, this option provides no way for you to include any message text for the body of the e-mail. When and if you use that option, make sure the Subject line isn't blank.

FIGURE 43-25

Make sure you fill out the Subject line field!



Mail Merge Task Pane/Wizard

YAHOO. YAHOO stands for *you always have other options*. YAHOO applies here as well. Your other option is to use the Mail Merge Wizard, rather than the individual tools in the Mailings ribbon. If you need a little more hand-holding when doing a mail merge, Word has the hand ready and waiting, in the form of the Mail Merge Wizard. To travel this particular yellow brick road, start a new blank document (or open a document you want to use as the basis for a data document). On the Mailings ribbon, click the Start Mail Merge drop-down and choose Step by Step Mail Merge Wizard. This opens the Mail Merge task pane, shown in Figure 43-26.

Step 1: Document Type

In Step 1, shown in Figure 43-26, choose the type of data document you want to create. Later, if you need to restore this to a normal document, in the Mailings ribbon, choose Start Mail Merge ➪ Normal Word Document. Click Next: Starting document.

FIGURE 43-26

Choosing the Mail Merge Wizard opens the Mail Merge task pane.



Step 2: Starting Document

In Starting Document, Word provides three options. Note that when you choose any of these options, Word explains the option in the lower part of the task pane. The options are as follows:

- **Use the current document:** Start from the current document and use the Mail Merge Wizard to add recipient information (merge fields).
- **Start from a template:** Start from a template, which you can customize as needed by adding merge fields and/or other contents. If you choose this option, click Select Template to be shown a list of all of the available templates (at least the ones that Word knows about). Note that despite the option's wording, it does *not* present you with a list of "ready-to-use mail merge" templates.
- **Start from existing document:** Open an existing mail merge or other document and change it to fit the current need by changing the contents or recipients. Recent mail merge documents, if any, will be listed. If the one you want isn't listed, click Open to navigate to the one you want, select it, and then click Open.

After homing in on the starting document, choose Next: Select recipients at the bottom of the task pane.

Step 3: Select Recipients

In Step 3, select from Use an existing list, Select from Outlook contacts, and Type a new list. These options, shown in Figure 43-27, correspond to the identical options described in detail in Chapter 41.

FIGURE 43-27

Select the desired recipients option and then click Next: Write your letter.



Step 4: Write Your Letter

In Step 4, you are greeted with four options:

- **Address block:** This leads to the dialog box shown in Figure 43-13. See the discussion under "Address Block" for additional details.
- **Greeting line:** The Greeting line option displays the dialog box shown in Figure 43-15. See the "Greeting Line" heading for more information.
- **Electronic postage:** As indicated previously, the functioning of this option requires the installation of third-party software that enables you to apply postage to items you send.
- **More items:** This option displays the dialog box shown in Figure 43-28. It is a shame that this thoroughly confusing dialog box appears as part of the Mail Merge Wizard. If you choose Address Fields, the dialog box shows you a list of all of the fields in its vocabulary, many or most of which are probably irrelevant to the attached database. Choose Database Fields instead to see a list of what's actually available for use in this merge.

Tip

In theory, you move the insertion point to where you want a merge field to appear, click More items, select the field, and click Insert. Dismiss the dialog box and repeat this series of actions for each merge field. In practice, however, if you know which fields you want to insert, go ahead and insert them all at once, and then cut and paste them where you want them to go. ■

Use a combination of text and merge fields to write the data document, inserting merge fields where you want database fields to appear. When you're done, click Step 5: Preview your letters.

FIGURE 43-28

Ignore the Address Fields option. The associated database fields are listed when you choose Database Fields.



Step 5: Preview Your Letters

In Step 5, shown in Figure 43-29, use the controls shown to move from record to record in your database. Note that the < and > tools correspond to the Previous and Next button in the Mailings ribbon. There's no reason you can't use the far more flexible and useful tools in the ribbon.

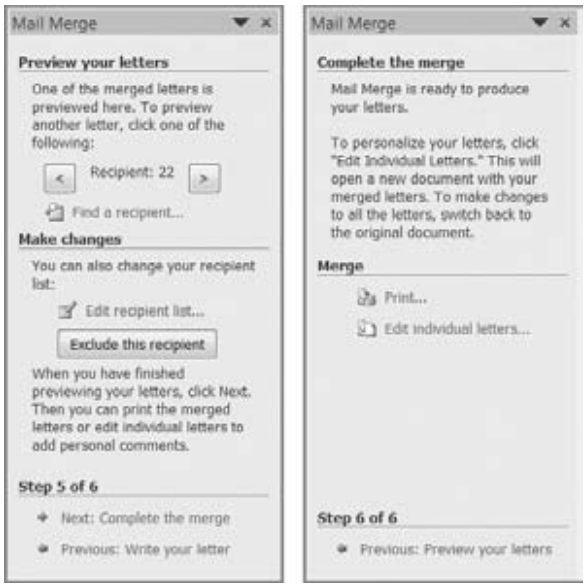
Notice that the Find a recipient and Edit recipient list perform identical actions, respectively, as the Find Recipient and Edit Recipient List ribbon tools discussed earlier in this chapter. About the only useful tool in this set is the Exclude this recipient option, which is the equivalent of choosing Edit Recipient List from the ribbon and removing the check next to the currently selected record.

Step 6: Complete the Merge

The contents of the Step 6 panel vary depending on the document type. As shown in Figure 43-29, when the document type is a letter, the options are to send the merged results to the printer or to send them to "individual letters." Actually, that's not at all what the option does. Instead, it sends all of the merged letter results to a single new document, in which the individual letters are separated by section breaks.

FIGURE 43-29

Use Steps 5 and 6 to preview the data document and complete the merge.



Summary

In this chapter, you've learned how to use each of the mail merge tools in the Mailings ribbon to begin a mail merge, attach a database to a data document, insert merge fields, and complete a data merge. You've also seen that this feature isn't just for mail merge, but has many other uses as well. You should now be able to do the following:

- Attach a data source to a Word document and select just the records you want
- Within limits, use Word tools to discover duplicate data records
- Insert composite merge fields, such as the Address Block and Greeting Line, as well as control how those fields are constituted
- Use the Mail Merge Wizard

CHAPTER 44

Forms

It seems that just about every time you turn around, someone has a form you need to fill out. There are job applications, credit applications, school forms, medical forms, subscription forms, tax forms, and the list goes on and on. All these forms aren't just on paper, either. Many of the same forms — and plenty more, to boot — are now online.

Word joined the forms parade a long time ago, so we're not talking about new features — more like a relatively new wrinkle, first introduced in Word 2007. While the new wrinkles might be dressed up all prettily saying "Pick me!" you might not want to pick them. After all, wrinkles are, if nothing else, wrinkled. In this case, that means they might not be what you're looking for. Let's dive in.

IN THIS CHAPTER

- Legacy form fields versus content control
- Design mode
- Creating forms using legacy tools
- Creating templates using content control tools
- Importing Word forms into InfoPath

Out with the Old, In with the New?

Word 2010 has two different sets of tools that can be used to create online forms:

- Legacy form fields from Word 2003 and earlier
- ActiveX form controls

Ostensibly, legacy form fields and ActiveX form controls are included with Word 2010 only to provide limited support for legacy documents. Hold off on that "ostensibly" part, however, because while Word 2010's Help steers you quickly to the new content control features when you ask it how to create forms, Word's other options point you steadfastly to door number two — legacy form fields from Word 2003 and earlier (and not the ActiveX tools).

Two Word options — designed to save forms data and print only forms data — work only with old-style forms. Choose Office ➪ File ➪ Options ➪ Advanced ➪ When printing this document. Notice the option to "Print only the data from a form." A little further down, under "Preserve fidelity when sharing this document," notice the option to "Save form data as delimited text file."

Both of those options work only with legacy Word 2003 form fields, so if you choose to use the new content controls, you'll have to use other means to gather the wool, so to speak.

Forms Basics

One way to think about a form is as a kind of reverse mail merge. Whereas the objective in a mail merge is to display data in a particular way, often combining data and document elements, the objective in using forms typically is to obtain data. Hence, document elements are combined with empty slots for inserting the data. *Document elements* are instructions telling the form user what kind of information is being sought. Such forms often are used for job applications, placing online orders, filling out surveys, and a host of other purposes.

Note

In the parlance of Word 2010/XML, forms have another purpose: to create document templates in which the objective is not specifically to obtain data. Rather, the purpose is to provide a method for constructing content-oriented templates. Extracting data from these new documents requires considerably more effort, as well as the talents of a programmer who knows his or her way around VBA (Visual Basic for Applications, which is the macro/scripting language that Word uses for its macros) and XML. While Word provides several XML tools in the XML section of the Developer ribbon tab, most of the useful XML editing capabilities were removed from Word due to litigation. For that reason, XML is not covered in this book. ■

Creating and Using Forms: General Steps

In Word, you create a data collection form using the following general steps:

1. Combine text instructions and content controls (or form fields) in a Word document.
2. Protect the document, enabling entry only in content control or form field areas. Do not protect the document or template for fill-in forms when the goal is to create a template that is not data-oriented.
3. Save the form as a Word template.

To use a form, you use the form template to create a new document. That document can then be sent out to be filled in, posted online, e-mailed, and so on.

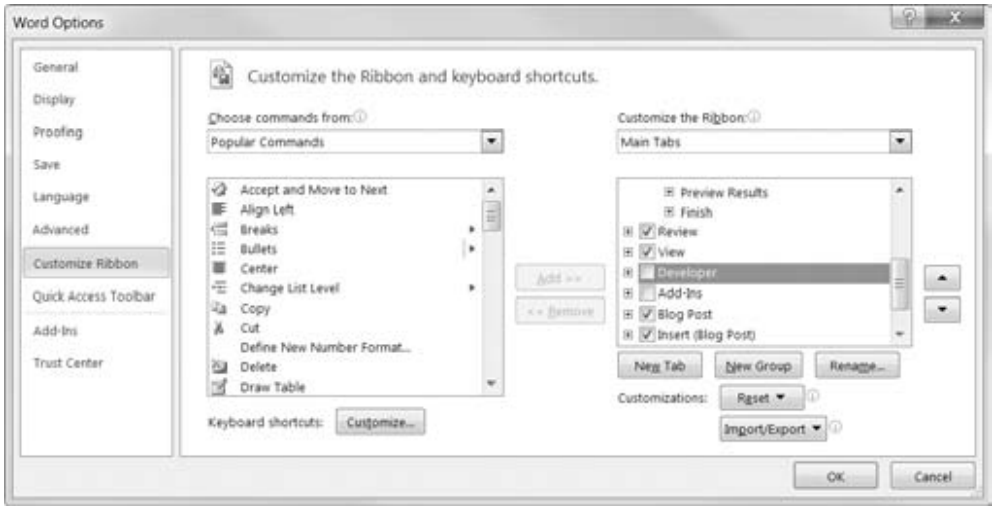
You can also create a form or template that isn't data-oriented per se. Rather, it contains strategically placed content controls to help users to create a document more quickly and to use precise formulations of text and formatting (in some instances) to promote consistency and accuracy.

Form, Tools, and Controls

Word's form tools and controls are located in the Developer ribbon. To enable the Developer ribbon, choose File ➪ Options ➪ Customize Ribbon, and place a check next to Developer, as shown in Figure 44-1.

FIGURE 44-1

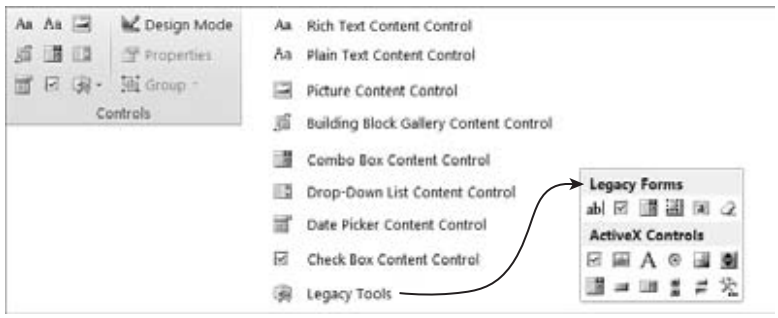
The Developer ribbon is not enabled by default.



The primary tools used for creating and working with forms are in the Controls section of the Developer ribbon, shown in Figure 44-2. In addition to eight content control tools, the Legacy Tools control provides access to the legacy forms tools from Word 2003 (and earlier), as well as ActiveX tools. Note that using ActiveX tools requires additional programming knowledge, and is beyond the scope of the *Word 2010 Bible*. For information about programming and forms, visit `www.mousetrax.com`, or search for help on the Internet.

FIGURE 44-2

Content controls and access to legacy form and ActiveX tools is provided in the Controls section of the Developer ribbon.



To access legacy forms tools and ActiveX controls, click the Legacy Tools drop-down arrow. Both Legacy Forms tools and ActiveX tools are also shown in Figure 44-2.

Tip

If having the legacy tools in the Developer ribbon isn't accessible enough, you can add them to the Quick Access Toolbar. To add the entire gallery to the QAT, click the Legacy Tools drop-down arrow as shown, and then right-click any legacy tool and choose Add Gallery to Quick Access Toolbar. For even better access, you can add the individual legacy forms tools to the QAT instead. Right-click the QAT and choose Customize the Quick Access Toolbar. Set the Choose Commands From option to Commands Not in the Ribbon. Look for Text Field (Form Control), Check Box (Form Control), Combo Box (Form Control), and so on. ■

Content Control Tools

Word 2010 provides eight content control tools:

- **Rich Text:** Provides an area in which the user can type formatted text
- **Plain Text:** Provides a plain-text area that cannot contain formatting
- **Picture Content Control:** Provides a control in which the user can insert or paste a picture
- **Building Block Gallery:** Provides a drop-down menu of Building Blocks. This enables you to include larger selections of boilerplate and other preset text than otherwise can be selected using the other controls. This can be handy for more complex forms.
- **Combo Box:** Provides a combination of preset options and user entry
- **Drop-Down List:** Provides a list of preset options only
- **Date Picker:** Provides a drop-down menu that enables you to pick the date using a calendar
- **Check Box:** Provides a check box that can be toggled checked/unchecked by clicking (correcting an oversight in Word 2007)

Unlike Word's legacy form fields, the content controls are not specifically designed to facilitate data collection. Rather, they are present in Word to facilitate constructing document templates. You can protect a content control–based document or template, permitting entry of data only in content controls. Therefore, you can send such a document to users so they can fill in the blanks, so to speak. However, extracting data from them is not supported by Word 2010 directly, and requires a fair amount of programming effort.

If you don't need to extract data directly from such documents, or use them to print data only onto preprinted forms, and if you find these tools more accessible than the legacy tools, then feel free to use them.

If you do need a systematic way to extract data from your forms, however, use the legacy tools described in the following section.

Legacy Form Tools

Click the Legacy Tools button to access Word's legacy form field tools:

- **Checkbox Form Field:** Create a clickable check box.
- **Text Form Field:** Insert a text form field; use can be controlled to prevent non-numeric or non-date entry in a text form field.
- **Drop-Down Form Field:** This tool enables users to choose from a list of preset options.
- **Insert Frame:** Insert an old-style Word frame as a container for manipulating form fields.
- **Form Field Shading:** Toggle shading of form fields, which enables you to quickly identify where form fields are located in a document.
- **Reset Form Fields:** Restore all form fields in a forms document to their default entry settings.

The legacy tools are used to create forms from which you will need to extract or print just data. One use for such tools is to create a specific pattern of data you can use to print onto preprinted forms (such as tax forms, order forms, and so on). Another use is so you can save just the data to a delimited text file, with each text file containing one record. You would then need to collect the text files into a single data file, wherein each file would be the basis for a single record in the data file. The details of how to print and save data only are provided later in this chapter.

ActiveX Controls

The third set of controls are the ActiveX controls (refer to Figure 44-2). Like content controls, ActiveX controls are of limited utility to most Word users from a data standpoint. They require a skilled programmer to use properly.

Like the legacy tools and content control tools, the ActiveX controls can also be used to record a document user's responses to questions. Like the content control tools, however, the ActiveX controls do not have the ability to save or print just data. If your document contains such controls, any responses recorded in them will not be retained when printing or saving just data. That talent belongs exclusively to the legacy tools.

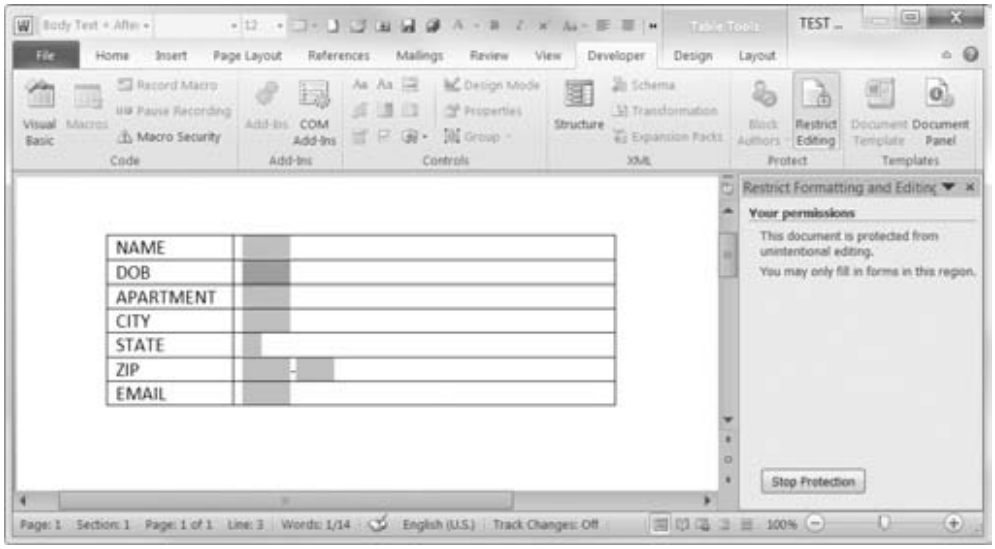
Forms Protection

Protecting forms documents has been mentioned several times in this chapter without any explanation. Like so many concepts in Word 2010, it's difficult to talk about any one concept without mentioning others, not unlike trying to explain eggs without mentioning chickens, and vice versa. When you protect a document for forms in Word, that means the user cannot edit any of the static text. The only places where the user can type or otherwise interact with the document's contents are in the form controls themselves.

Consider the simple document shown in Figure 44-3. The shaded second column contains a series of form fields. When the document is protected, you can type only in the form fields. The instructional text (Name, DOB, Address, and so on) is off-limits.

FIGURE 44-3

When you protect a document for forms, you can type only in the form fields.



To protect a document for forms editing, in the Developer ribbon, first make sure that Design mode is turned off (you cannot protect a form if Design mode is active). Then, click Restrict Editing, which displays the Restrict Formatting and Editing task pane, shown in Figure 44-4. In section 2, click to turn on the check box next to "Allow only this type of editing in the document," and set the drop-down selection to Filling in forms. When you're ready to begin enforcement, click Yes, Start Enforcing Protection.

Word responds by displaying the Start Enforcing Protection dialog box, shown in Figure 44-5. You can include a password if you like — the choice is yours. Note that the User authentication option appears only if you're using an Enterprise edition of Word 2010. An authenticated user is one who is logged on to the computer or network to which the computer is attached — and only on certain kinds of networks. Don't be concerned if this option is grayed out or missing completely.

Caution

Most users don't know how to enable or disable forms protection. Most users, for that matter, won't even have enabled the Developer tab, so even if you don't use a password, users aren't likely to cause any mischief or wreak havoc. If they do turn off protection, then at worst they will mess up the document and won't give you any useful information. So what? If it's a job application, and if knowing how to turn off document protection is one of the qualifications, then consider this a test — and they passed it. Or, if not messing up forms is a virtue you seek in your employees, then they flunked. Good way of screening applicants, right?

If you set a password and forget it, you will have completely lost the capability to modify the document or template, probably with no hope of recovery. If it's a complex document, you're going to have to redo all that work. If you ignore this cute little vignette and decide to use a password, don't forget it or lose it. ■

FIGURE 44-4

Word offers a number of different kinds of editing restrictions.



FIGURE 44-5

A password isn't mandatory, but it's often not a bad idea to avoid confusing and/or tempting users.



Do Not Protect a Document If . . .

If the document you are creating is not being used for data collection of some kind, but rather uses content control to drive the creation of a document, you do not need to protect the document for fill-in forms. In fact, if you do, the template will not be terribly useful.

Unprotecting a Form Document

To remove protection for fill-in forms, if the Restrict Formatting and Editing pane isn't displayed, in the Developer ribbon, choose Protect Document ➪ Restrict Formatting and Editing. At the bottom of the Restrict Formatting and Editing pane, click Stop Protection. If a password has been set, type the password and click OK or press Enter. If you forgot the password, see the Caution preceding this section and hang your head in shame.

Creating a Fill-In Form Using Legacy Tools

Now that you know the basics about forms, it's time to create one. One of the most common uses for online Word forms is subscriptions and order forms. In this section you learn how to create a simple order form template using Word's legacy form tools. The basic steps are as follows:

1. Draft or sketch what you want the form to look like. This will speed the process of designing your form.
2. Create a document that contains instructional text and form fields in which the user can provide answers to questions.
3. Turn on protection for fill-in forms.
4. Save the document as a template.
5. Create a new document based on the template.
6. Make the new document available to customers so they can fill it out with the needed information.

To do this, you're going to use legacy form fields because they provide the following advantages and features that content controls do not:

- The ability to control the type of data entry (for example, to reject non-date data from a date field and non-numeric data from a numeric field)
- The ability to automatically perform calculations
- The ability to specify numeric formatting

Create Form Document

In a new Word document, type any instructional text you need. Often, setting up a form is easiest when you create a table, including your instructional text in one column and the fill-in or other forms in a second column, as shown in Figure 44-6. To create the form shown here, a 2 × 12 table was inserted. The variation on the basic two-column table in the final four rows was done using the Draw Table tool in the Table Tools Design ribbon (see Chapter 17 for more information on working with tables).

FIGURE 44-6

Tables help in the organization and positioning of form fields and other information.



Acme Roadrunner Supplies, LLC
77 77th Street
New York, CA 90210

DATE	7/31/2010	
SHIP TO:	All items shipped UPS. UPS will not ship to a post office box.	
NAME	Customer Name	
STREET ADDRESS	Shipping Address	
APARTMENT		
CITY	City	
STATE	Select State from List	
ZIP	5 Digit Zip Code	
ITEMS ORDERED	**QUANTITY**	**PRICE**
FAKE TUNNEL PAINT	0 (32 OUNCE SPRAY CAN)	$0.00
EXPLODING TUMBLEWEED	0	$0.00
TOTAL		$0.00

Turn on Nonprinting Formatting Characters and Form Field Shading

To facilitate working with form fields, it helps to display nonprinting formatting characters and form field shading. It sometimes helps to turn on the display of bookmarks as well, although bookmarks are turned off here so that you can read the field contents better.

Note

Legacy form fields use bookmarks as their names. This allows the fields to be used by other fields for calculations and logic tests. This is discussed more a little later in this chapter. ■

To toggle the display of nonprinting formatting characters, press Ctrl+Shift+8. When they're turned on, spaces display as dots, and paragraph marks display as pilcrows. More important, the spaces inside a text form field display as little circles, as you'll see shortly.

To turn on the display of form field shading, in the Developer ribbon, choose Legacy Tools ➪ Form Field Shading (second item from the left under Legacy Forms).

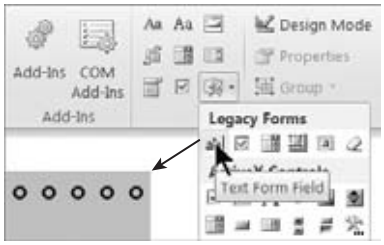
To turn on the display of bookmarks, choose File ➪ Options ➪ Advanced. Under Show document content, ensure that Show Bookmarks has a check next to it.

Insert Text Form Field with Date Format

Word's legacy text form fields actually provide a lot more than just a place to type text. To create the date field shown in Figure 44-6, in the Developer ribbon, choose Legacy Tools ➪ Text Form Field, as shown in Figure 44-7. If field shading and nonprinting formatting marks are displayed as instructed earlier, the text form field displays as shown in Figure 44-7. The five little circles are special spaces. If you press Ctrl+Shift+8, the circles disappear. If you do that and turn off form field shading, the entire field becomes invisible (for now). This can make working with such form fields rather difficult.

FIGURE 44-7

If you need dynamic forms that can perform calculations, all of the tools you need are listed under Legacy Forms when you click the Legacy Tools tool.



Double-click the text form field to open the Text Form Field Options dialog box. This is where you give that form field some personality. Using the Type drop-down arrow, choose Date, as shown in Figure 44-8.

FIGURE 44-8

You can set a text form field to any of six types of data.



When you set the type to Date, notice that the default and format settings titles change to Default date and Default format. For the date style shown in Figure 44-6, set Date format to MMMM d, yyyy. If the user types **7-31-10**, Word automatically converts it to July 31, 2010. If the user types something other than a date, Word prompts for a valid entry, as shown in Figure 44-9.

FIGURE 44-9

When the text form field type is set to Date, Word will accept nothing less!



If you want to be able to use the date elsewhere, use the Bookmark field to assign a bookmark to it. You might want to change the bookmark to something more memorable that offers a better reference point, such as OrderDate. You can then use { REF OrderDate } to insert that date elsewhere in the file. Ensure that Fill-in enabled is checked if you want the user to be able to type a date.

If a field requires special instructions, click Add Help Text. In the Form Field Help Text dialog box, shown in Figure 44-10, you can specify two kinds of help: Status Bar and Help Key (F1). When the form field is selected (by clicking on it or tabbing to it), the status bar Help message (up to 138 characters) is displayed on the status bar at the bottom of Word's window. If you press F1 while the form field is selected, your Help Key text (up to 255 characters) is displayed in a message box.

FIGURE 44-10

Word enables you to provide two flavors of Help for form fillers.



If you want to reuse either your Status Bar or your Help Key text, you can create AutoText entries. That way, you'll never be at a loss for helpful words. Use the drop-down arrow next to AutoText entry to select the desired AutoText item. See Chapter 13 for information on creating AutoText entries.

Insert Regular Text Form Field

When you insert a text form field, Word defaults to using the Regular text type. From the Developer ribbon, choose Legacy Tools ➪ Text Form Field (refer to Figure 44-7). Double-click the form field to open the Text Form Field Options dialog box (refer to Figure 44-8). Type should already be set to the default Type. Under Default text, you can reinforce the NAME instruction by including some default text, such as **Please type your name here**. If the name field ultimately will be used by a process that has a length limit, use the Maximum length control to set a limit. Note that because this is a simple example, there is only one field for name. Ordinarily, however, you might invest a few more minutes and include separate fields for first name, last name, middle initial, title, and suffix. For title and suffix, you might use drop-down fields (which you'll see shortly) instead of text fields, both to facilitate entry and to restrict the entry to the range of options you want to accommodate.

Tip

Anytime you create a form field that has re-use potential, save it as a Building Blocks Gallery item. You might consider creating a new Category (for example, Form Fields) expressly for this purpose, and to make them easier to find when you are designing forms. ■

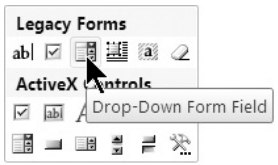
If the ultimate data handler can benefit from specific text formats (for example, uppercase, lowercase, first capital, or title case), choose a specific Text format. Otherwise, as long as it doesn't exceed the maximum length you set, the text form field will accept anything you type. Ensure that Fill-in enabled is checked, add Help text, if needed, and then click OK to accept the changes.

Insert Drop-Down List

To insert a drop-down list, in Legacy Tools in the Developer ribbon, click the Drop-Down Form Field tool shown in Figure 44-11. With form field shading turned on, this inserts a gray rectangle.

FIGURE 44-11

Use the Drop-Down Form Field tool to create a list with preset options.

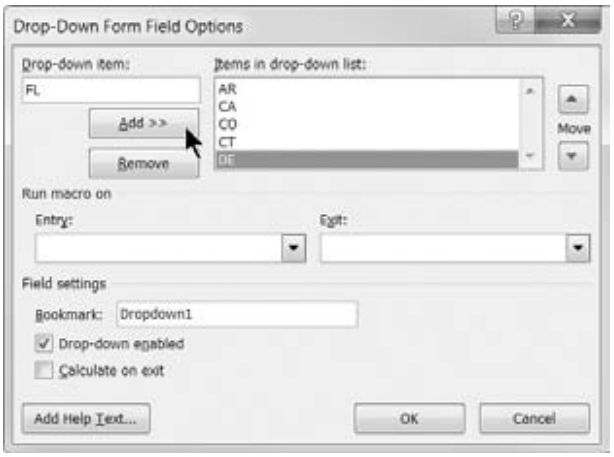


Double-click the Drop-down form field to display the Drop-Down Form Field Options dialog box. As shown in Figure 44-12, type items you want to add into the Drop-down item box. Then click Add. Continue adding items until you're done, or until you reach 25, which is the limit.

Read the following Tip, however, to save a bunch of time, especially if your drop-down list is long.

FIGURE 44-12

Save labor-intensive form field items as Building Blocks for future use.



Tip

When adding a long series of items, don't reach for your mouse. Instead, notice in Figure 44-12 that the Add button has an underlined A. No, the A isn't scarlet, and Nathaniel Hawthorne didn't have a hand in any of this. It means that you can "push" the Add button by pressing Alt+A. You can more quickly enter your list of items by typing the item, pressing Alt+A, typing the next item, pressing Alt+A, and so on, until you're done. Mercifully, the insertion point remains in the Drop-down item textbox throughout. In addition, once you've created a list of states (provinces, too, perhaps), remember the earlier tip to save the resulting drop-down form field as a Building Block for future use. ■

Run Macro On

Up until now, we've ignored the Run Macro On fields in the form field option dialog boxes. If the current document or template contains macros, they will be listed using the drop-down arrows next to Entry and Exit. You can use macros to perform setup/housekeeping tasks when a given form field is selected, as well as when the insertion point leaves that field.

For example, suppose somewhere else in the form is a form field for selecting a country. When entering a drop-down field, if the country selected is Canada, it doesn't make sense to have a list of states. Rather than have a longer list that combines both states and provinces, an entry macro could redefine the options for this field.

Suppose also that your business has offices in a number of states, and therefore must charge sales tax in those states. Similarly, for international sales, shipping would be different. You might use an exit macro to take care of those details, once a state, province, or other destination has been selected. For an introduction to writing macros, see Chapter 49.

Insert Numeric and Calculation Fields

Some form fields are designed to work together. In the example form shown in Figure 44-6, the Price form field uses the contents of the Quantity field. As designed here, the user isn't able to type into the Price field. The price is calculated automatically based on quantity.

To insert the Quantity field, choose the Text Form Field as shown in Figure 44-7. Double-click the form field. Set the Type field to Number, and set the default number to 0 (zero). Under Maximum length, choose a length that's reasonable (for example, if your inventory is 500, it might not make sense to allow more than three digits). Set Number format to 0 (zero). Under Bookmark, replace the text# name with something more useful, such as the name of the item. Let's call this one *paint*, but this makes sense only for the example shown here. Ensure that Fill-in enabled is checked, and click OK.

Caution

Whereas the date type of text form field alerts you when a non-date is entered, the numeric type isn't quite so clever. If you type text into a numeric type form field, instead of alerting you that your entry isn't valid, Word simply removes the non-numeric part of whatever you type, except for the letters *h* and *t*. Somewhere along the way, this aspect of the text form field's type checking broke and was never fixed, so don't count on type checking to prevent incorrect data. ■

Now, insert the Price field. As before, click the Text Form Field tool as shown in Figure 44-7. Double-click the form field to open the Text Form Field Options dialog box. Set Type to Calculation. In Expression, you want to calculate the price to display based on the number of items shown under Quantity. If the quantity field is bookmarked as *paint*, and the price of a can of paint is $5.99, then inscribe the expression as **=paint*5.99**, as shown in Figure 44-13.

FIGURE 44-13

When Type is set to Calculation, Fill-in enabled is automatically disabled (grayed out).



Set Number Format to something befitting a price calculation, as shown in Figure 44-13. Set Bookmark to something else you can remember because the result of this calculation is going to be used in another one later. Notice that Fill-in cannot be enabled. That's because this is a calculation field, and you want it to be automatic. Enable Calculate on exit. If needed, you can add some help text. Whether you should do that depends on the complexity of the information being presented. Click OK to add the form field.

Once the prices for other items have been determined, a third calculation field would also be needed to compute the total. This one would be the simple sum of the other two prices.

Using Content Controls

Content controls, unlike Word's legacy tools, are of limited utility for data collection by most Word users. That's because in order to use them, you really need the services of a programmer who understands how to extract data from the resulting Word XML file.

If you have InfoPath, another scenario is to design data collection forms using Word, and then import those into InfoPath. They can then be published to a SharePoint, InfoPath, or other server, where they can be downloaded, filled out, and returned.

Word's content controls are useful, however, in developing document templates. This section looks at each of the six controls and how they might be used to put together a document template.

Design Mode

For full access to content controls, you need to be in Design mode. In the Developer ribbon, click Design Mode, as shown in Figure 44-14.

FIGURE 44-14

For full content control functionality, you must be in Design mode.



Design mode provides full access to content controls. For example, if a content control is protected against deletion, you can delete it only in Design mode. Placeholder text can also be changed only in Design mode. Additionally, when Design mode is turned on, the content control

itself gains horizontal scroll controls (beginning and end of text), as shown in Figure 44-15. To change the placeholder text, select the existing text and edit it or type over it.

FIGURE 44-15

Design mode is needed to edit placeholder text.



Don't Forget to Turn Off the Lights . . .

Once you're finished designing your form and are ready to save it, turn Design mode off. This enables forms to function properly. Note that you will not be able to protect a document for fill-in forms unless Design mode has been turned off (assuming you want to; if the document you are designing isn't a fill-in form for data collection, you don't need to protect it in this way).

Content Control Tools

Word 2010 has eight content control tools, described earlier in this chapter. Each of these has an associated Properties dialog box that enables you to control most aspects of the content control. The Properties dialog box for the Rich Text control is shown in Figure 44-16.

FIGURE 44-16

Content Control Properties for different controls have a number of common settings.



Though each Properties dialog box has some differences, they also share a number of common features and settings:

- **Content control cannot be deleted:** Enable this setting when you are planning to use the resulting document for data collection and programmatic data extraction. Extracting the data depends upon the data fields being identified.
- **Contents cannot be edited:** Use this setting to lock in a particular value. If you are assembling a contract or other document using boilerplate contained in content controls, there are some aspects that you do not want an end user changing.
- **Remove content control when contents are edited:** Use this option if the content controls are part of a document template and are only there to provide general guidance as to document structure. Once the document is done, there is no harm in removing the content controls. (This option is not present for the new Check Box content control.)

Rich Text

Use the Rich Text content control to reserve a place for the user to enter formatted text. The term *rich text* is sometimes confusing. Here, the term stands not in contrast to HTML (which it usually does), but simply to indicate that formatting is allowed. You are not limited to character formatting. A Rich Text content control can contain paragraph formatting, styles, headings, columns, equations, and so on. It can also contain paragraph breaks, page breaks, and even section breaks. If you want to get thoroughly obsessive about it, a single Rich Text content control could contain a whole multipage, multisection document, with pictures, tables, and charts.

To change a Rich Text content control's default settings, click anywhere in the content control and then click Properties (or choose Properties as shown in Figure 44-14), which displays the dialog box shown in Figure 44-16. A title isn't essential unless you plan to export the document to InfoPath or otherwise plan programmatic access to the data fields. If you're just putting together a document template and the controls are there more for guidance than for control, a title isn't essential. Title adds a little ID label at the top of the content control container that identifies the control when it's selected.

Tag is used for identifying XML data. Again, if you're using content control to provide guidance in a document template, a tag isn't useful. If you're using content control to collect or present data that will be repurposed or otherwise used in an XML process, then you should supply a useful tag. It's not unusual for tags and titles to be the same.

The "Use a style to format contents" option is used to limit some of the variation just discussed. When this setting is enabled, you cannot have variations in style, and only the style chosen will be used.

Plain Text

Use the Plain Text content control to contain text in which you do not want formatting variation. Any formatting applied affects all text in the control. The Properties dialog box for the Plain Text content control is almost identical to that for the Rich Text control, with one additional option:

- Allow carriage returns (multiple paragraphs)

This option is disabled by default. With this option enabled, you still can't really insert carriage returns *per se*. Instead, Word now allows you to insert new line (Shift+Enter) breaks, as well as page breaks and column breaks (but not section breaks). Oddly enough, with or without this setting, Word allows Plain Text content control content to be formatted into columns.

Picture

Use the Picture content control to provide a place for the user to insert a picture. In setting up a data collection form, this control might be used for inserting a picture of the respondent, a house, a car (or other merchandise being offered for sale). The Picture content control is inserted in line with text, and the wrapping cannot be changed. If you try to drag the picture control to a new location, the control will be copied to the new location instead.

Tip

If you need more flexibility, you can get around this limitation by first inserting a textbox, and then inserting the picture control inside the textbox. The textbox's wrapping style is not limited, so the picture can be dragged as needed. Be careful when dragging, however, and make sure you're dragging the textbox, rather than the picture control. If you drag the picture control, it will be copied!

The picture control's Properties dialog box, shown in Figure 44-17, offers fewer options than any of the others. Use the controls indicated to prevent the picture control from being deleted or to prevent the picture itself from being replaced or edited. ■

FIGURE 44-17

The Picture content control Properties dialog box offers limited options.



Drop-Down List

Use a drop-down list to restrict user responses only to those that are provided in the drop-down list. One of the most common applications for this is a list of state postal abbreviations. Hence, for users in Virginia, you won't sometimes have the full state name — Va., VA, and even Vir. This can make using and processing data faster and easier, as you don't have to allow for a lot of strange variations and possible ambiguity.

Setting up a drop-down list is a little different from the content controls discussed so far. Until now, the controls discussed are pretty much ready-to-use straight off the rack, so to speak.

A drop-down list, however, can be rather labor intensive and requires additional setup. In the Developer ribbon, click the Drop-Down List content control, shown in Figure 44-2. Then click Properties, which displays the dialog box shown in Figure 44-18.

FIGURE 44-18

Use the Drop-down content control to limit the user's range of options.



To add drop-down options, click Add. In the Add Choice dialog box, shown in Figure 44-19, in the Display Name field, type the name that will be displayed as the drop-down option (called *choice* in the dialog box). Notice that as you type the name, Word adds the name as the value. You're not stuck with that value, however. If Green paint really is product number 008975-G, then by all means inscribe that value into the Value field.

Tip

In the default drop-down settings, notice that the first choice really isn't a choice at all. It is an instruction. In more sophisticated forms, you can't select that item. In Word, you can (unfortunately). There really is nothing you can do about this except *not* adopt the practice. Delete that choice, and provide a valid default choice. ■

Despite the fact that the default placeholder text and the default first item both are Choose an item, setting the default first item to something different does not change the placeholder text. To change the placeholder text to match any instructional text you might have included as the first drop-down item, with Design mode turned on, click the content control's drop-down arrow, shown in Figure 44-15, and choose Edit Placeholder Text.

FIGURE 44-19

Setting up choices for a drop-down field can be very labor intensive.



Note

If you followed along in setting up a drop-down field using legacy form fields, you might have noticed that setting up a drop-down content control is even more tedious. This makes saving your work (for example, as a Building Block) for future use even more important. ■

Combo Box

A combo box is a combination of a textbox and a drop-down list. The idea is to provide the most common options in the drop-down list, but allow for the possibility that one size doesn't fit all. When you do this, of course, you open yourself up to the problem indicated earlier, in which you might end up with a lot of different responses to handle.

Tip

Rather than use a combo box, use a drop-down box with an "Other" option instead. Then provide a separate text control in which the user can clarify what "Other" means. ■

To create a combo box content control, that excellent tip notwithstanding, click the Combo Box tool shown in Figure 44-2. Then click Properties, which displays the Combo Box Content Control Properties dialog box. Follow the same procedure shown for the Drop-down content control to add drop-down options, or choices.

You might also notice that the properties for the Combo Box and the Drop-down control are identical. The only difference is in behavior, in that you can overwrite the choice shown in the Combo Box to provide your own.

Date Picker

User the Date Picker to insert a calendar control, like the one shown in Figure 44-20, for choosing the date. Use the arrows shown to go to the next/previous month. Click a date to enter that date into the date control. Note that there is no easy way, for example, to jump to the year 2014. You basically have to lean on the Next Month control until your time machine gets there.

FIGURE 44-20

The Date Picker inserts a GUI control for entering dates.



To insert the Date Picker content control, click the Date Picker button in the Developer ribbon, and then click the Properties button to display the Date Picker's Content Control Properties dialog box, shown in Figure 44-21. Note that the selections that appear under Locale are determined by which languages you have installed. Calendar type will include only Western unless you've installed support for certain Asian calendars. For the final option, check with your IT department to determine whether you need to use a particular format.

Building Block Gallery Control

The final content control enables you to provide access to the Building Blocks Gallery. One way to leverage this feature is to create a specific category designed to work with the form or template you are designing, using items created in a specific gallery. Then, using the Properties dialog box, limit the content control to using that specific gallery and category. You would need to set up the categories and content separately, as shown in Chapter 13.

Click the Building Block Gallery tool in the Developer ribbon to insert the content control. Click Properties in the Developer ribbon to display the Properties dialog box for the Building Block Gallery content control, shown in Figure 44-22. Type a title, if useful, choose any options you need, make the appropriate Gallery and Category selections, and then click OK. Now, the chosen gallery items will be available for drop-down insertion into your document.

Check Box Control

Use the check box control to insert a clickable check box into your document. Unlike the legacy check box, you do not need to protect the document for the check box to function. By default, "checked" displays an X in the box. In the Content Control Properties dialog box, use either Change button to choose different characters for Checked and Unchecked.

FIGURE 44-21

You can set the date format, locale, calendar, and format for storing the date in XML.



Word and InfoPath

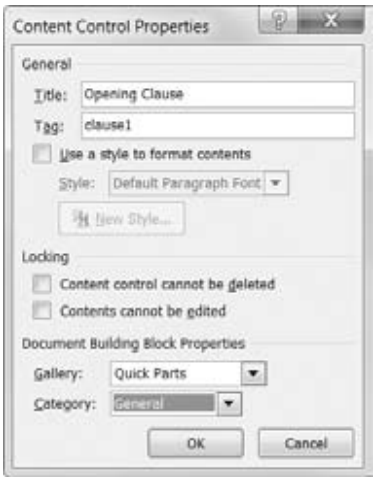
There are a number of deficiencies in Word's ability to create and handle forms. The most glaring deficiency is the nearly complete inability to perform data validation without resorting to macros/VBA. If you have InfoPath 2010, however, you can easily avoid many of those problems by designing your basic form in Word 2010 (assuming you're most comfortable using Word), importing the form into InfoPath, and adding data validation and other missing features using InfoPath's capabilities.

Importing a Word Form into InfoPath

InfoPath 2010 can import forms created in Word, provided that any of the following file formats are used: doc, dot, xml, rtf, docx, dotx, docm, dotm. Design your form in Word, and save it to one of those formats.

FIGURE 44-22

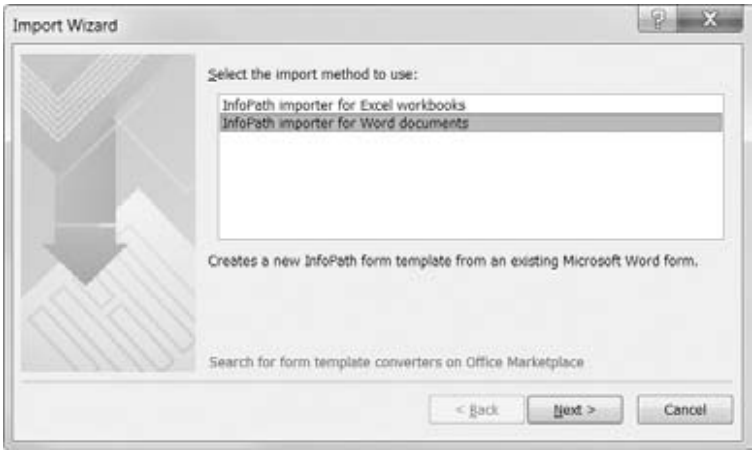
Use the Building Blocks Gallery content control tool to insert boilerplate text.



Start InfoPath. From the Getting Started panel, choose Import a Form. Or, if Getting Started is not active, choose File ➪ Design a Form Template ➪ Import. This starts the Import Wizard, shown in Figure 44-23. Click "InfoPath importer for Word documents" and click Next.

FIGURE 44-23

Use InfoPath's Import Wizard to import a form created by Word or Excel.



In the next window, click Browse to navigate to and select the Word document you want to import, and click Open. Back in the Import Wizard, click Options, displaying the Import Options dialog box, shown in Figure 44-24.

FIGURE 44-24

When you click the Custom Conversion option, the checked options are the ones InfoPath uses by default.



Choose what/how you want to import:

- **Layout only:** Choose this option if you want to insert the form fields from within InfoPath and abandon any that were inserted using Word. This option requires familiarity with InfoPath, or a willingness to learn. If you're familiar with InfoPath and plan to convert a normal Word document into a form, your best bet is to skip using Word's form tools, import the document, and choose Layout only (there won't be any form fields to import anyway).
- **Layout and form fields (default):** In most cases, this option results in the least work and reinventing of the wheel.
- **Layout and form fields (custom):** Choose this option if you need to deviate from the defaults. When you click this option, the checked settings you see at first reflect the defaults.

When you've selected any options you need, click OK to continue, and then click Finish back in the wizard. Note that it's not unusual to see a message that says there are potential issues,

and to use the Design Checker to review them. More often than not, there are simple formatting issues that InfoPath was able to resolve. You might also see a message saying that tracked changes were discarded. It's not unusual to see this message even when the document didn't contain any tracked changes. It's simply InfoPath's way of asserting its independence.

Publishing to Forms or SharePoint Server

Once your form is done, whether it is in Word format or InfoPath format, it can be posted for use onto a SharePoint server or InfoPath server. See Chapter 52 for information on publishing to a document management server.

Summary

In this chapter, you've learned that Word has access to three different sets of form tools, and that only one set is really suitable for creating fill-in forms using Word. You've learned how to use Word's legacy form fields to create an order form, and you should be able to translate those techniques into creating a variety of different forms. You've also learned about Word's content controls feature, and how you can use content controls to create a document that basically tells the user what to type. You should now be able to do the following:

- Decide what set of form tools to use, based on your level of knowledge and your support resources
- Create a form for collecting information
- Use content controls to create a document template
- Protect and unprotect a document for forms entry

Part VIII

Power and Customization

The success of any piece of software is the degree to which it does what you want it to do. If software just happens to work the way you want it to, great. If it doesn't do what you want, chances are good that you'll keep on looking until you find something else that does. Fortunately, Word's philosophy is "If you don't like it, change it." Part VIII shows you how to change the aspects of Word you don't like, to sculpt Word into a word processing environment that fits the way you work.

Chapter 45 shows you how to take full advantage of Word's greatest and most flexible asset, the keyboard. Chapter 46 focuses on the Quick Access Toolbar. Chapter 47 tells you how to customize Word's ribbon — a feature missing from Word 2007. One of Word's most powerful yet confusing features is its dizzying array of options and settings, which you tackle head-on in Chapter 48. Chapter 49 gives you a running start with Word's most powerful feature — macros, which are based on Microsoft's Visual Basic for Applications.

IN THIS PART

Chapter 45
Keyboard Customization

Chapter 46
The Quick Access Toolbar

Chapter 47
The Ribbon

Chapter 48
Options and Settings

Chapter 49
Macros: Recording, Editing, and Using

CHAPTER 45

Keyboard Customization

To a Word power user, one of the most amazing pieces of Word trivia is that most users don't take advantage of the option to customize Word's keyboard. It's pure agony for a power user to watch as someone repeatedly reaches for the mouse, drilling down through multiple layers of ribbons for a command that could easily be assigned to a simple keystroke.

Some of us like to think that this lack of customization is really a lack of awareness. Once you know that I-95 exists, why on earth would you choose instead to drive US 1 when going from Jacksonville to Richmond? You might make occasional scenic detours, bypass an accident, or stop for lunch, but there's no way you'd put up with all of those traffic lights the entire way.

Ribbons are like traffic lights. They're there if you need them, but if you already know where you're going, why not go there directly? Let's hit the road!

IN THIS CHAPTER

- **Shortcuts for assigning shortcut keys**
- **Understanding shortcut keys and templates**
- **Advanced methods for finding commands**
- **Assigning shortcut keys to styles, symbols, and macros**

Getting Started

The first thing you need to know when you consider customizing your keyboard is that there effectively are no reserved keys in Word. Unlike a lot of programs, in which you have no choice or little choice about what's assigned to what, in Word your options are wide open. If you would rather that Ctrl+H be used to highlight selected text (yellow marker style) than be used for Replace, it's yours for the asking. If Ctrl+T really doesn't work for you, mnemonically speaking, for hanging indent (or, better still if you had no clue that that's what Ctrl+T does), feel free to reassign Ctrl+T to the thesaurus, or to something else.

You have a variety of ways of remapping where you go when you let your fingers do the walking. To really appreciate the fast way, it helps to be

familiar with the tried-and-true official channels method. However, to try to get you into the spirit of things more quickly, this chapter is going to toss convention to the wind and start with the shortcut methods. Later, you learn about the scenic route.

The Fast Way (The Cloverleaf Method)

To quickly find out what [almost] any keystroke does, Press Ctrl+Alt+Plus Sign (on the number pad). This runs the Tools ➪ Customize Keyboard ➪ Shortcut command, and turns the mouse pointer into the cloverleaf shown in Figure 45-1. When you press another keystroke or click any tool that has a command or macro assigned to it, the Customize Keyboard dialog box appears, also shown in Figure 45-1.

FIGURE 45-1

Ctrl+Alt+Plus Sign followed by any command shows you the command name and any keys assigned to it.



In this case, Ctrl+Alt+Plus Sign was pressed, followed by F3 (the Insert AutoText keystroke). The associated command, InsertAutoText, and the currently assigned keys (F3 and Alt+Ctrl+Shift+V, in this case) are displayed.

This isn't just for display. At the same time, the focus is given to the Press new shortcut key box. To assign an additional keystroke, press the key combination you want to assign, and then click the Assign button.

Note

Before clicking Assign, ensure that the Save changes in setting is set to the correct template. If you're customizing a particular template, use it. Or, use `Normal.dotm` if you want the assignment available all the time. ■

Suppose, for example, that you have just clicked the Navigation Pane tool for the thousandth time, and really would rather have a shortcut key assigned to it. Press Ctrl+Alt+Plus Sign, and then click Navigation Pane in the View menu. The Customize Keyboard dialog box appears. Under Current keys, nothing is currently assigned. Decide what you want to assign (if you never use Normal view, for example, you might consider Ctrl+Alt+N), and press that key combination.

When you try a combination, below the Current keys box, Word displays Currently assigned to, showing the current assignment. If you don't want to use that assignment, press Backspace and try again. When you find a keystroke that's either currently unassigned or assigned to a command you never use, click Assign to assign it.

What Does This Have to Do with Templates?

Keyboard assignments are stored in documents or templates. The default location is `Normal.dotm`, but at any given moment a keyboard assignment can be stored in any of three locations:

- The current document. If you save a key assignment in the current document, that key assignment will be available only when editing that document.
- The template on which the current document is based (if different from `Normal.dotm`). Key assignments saved in the current template are available only when editing documents based on that template. Assignments in that template take precedence over assignments in `Normal.dotm`, but not over assignments in the current document (if they are different).
- `Normal.dotm`.

As a general strategy, therefore, any key assignments you want to be available throughout Word, you should save in `Normal.dotm`. If an assignment is relevant only while editing a particular document or template, then set Save changes in accordingly (see Figure 45-1).

Multi-Stroke Key Assignment

Ordinarily, most users think about keystrokes in terms of Ctrl+S, Alt+B, Shift+F5, and so on. Word does enable you to create these kinds of shortcuts, but you can also create another kind, such as Ctrl+S,1 or Ctrl+T,Z. For these assignments, you would press the initial keystroke, such as Ctrl+S, and then (after releasing the Ctrl and S keys) you would type an additional character, such as a 1.

Why would you want to do this? You might want to do this because it greatly expands the number of shortcut keys you can create for any given Ctrl, Alt, Shift + *key* combination. It also lets you do so in a logical and methodical way. For example, by default, Headings 1 through 3 are assigned to Ctrl+Alt+1 through 3. For some of us, that's not exactly an easy combination to press with one hand. Moreover, what about Heading 4 through 9? Many people use those styles as well.

What if, instead of those three difficult-to-press assignments, you could instead press Ctrl+Shift+X followed by 1 through 9? (By default, Ctrl+Shift+X toggles XML tags, so if you're not an XMLer, this might work for you.) That then gives you the much easier Ctrl+Shift+X to press, and easy-to-remember 1 through 9 for the respective heading styles.

Or, suppose you frequently work with mail merge. Very few of the Mailings ribbon tools have built-in key assignments. You might consider assigning Ctrl+M,S to Select Recipients, Ctrl+M,E to Edit Recipients List, and so on.

To create a multi-stroke assignment, in the Press new shortcut key field (refer to Figure 45-1 or Figure 45-2), press the first combination, release the keys, and then tap the next key. The assignments will appear as Ctrl+M,S and Ctrl+M,E, just as shown here. Click Assign, and you're off and running.

Word Options Method

Having covered the basics and the cloverleaf method, let's look at the normal method. Though the cloverleaf method is great when it works, it doesn't always work. Some commands aren't available in any of the ribbons and don't have default assignments. Other commands are available only indirectly (for example, from inside a dialog box) and hence aren't accessible to the cloverleaf method. When the quick cloverleaf method isn't available or otherwise doesn't work, use the Word Options method — and even it can be assigned to a shortcut, so it doesn't have to be much more onerous than the cloverleaf method. From it, you can assign *just about* any key to just about any command. (Hold that *just about* thought for a moment.)

Choose File ➪ Options ➪ Customize Ribbon ➪ Customize (at the bottom of the dialog box). Referring back to Figure 45-1, notice that the Categories field has only All Commands showing, and grayed out. The Commands list shows only a single command. That's because we got there using a back road. When you go there using the main road, however, all options are available, as shown in Figure 45-2. Not to overplay the routing metaphor, but you can get to the full-service Customize Keyboard dialog box using a shortcut — just not using the built-in cloverleaf shortcut shown previously. Instead, you can assign Customize Keyboard to a shortcut key of its own, as shown in Figure 45-2. That way, the full-service Customize Keyboard is just a keystroke away, like the single-command cloverleaf version.

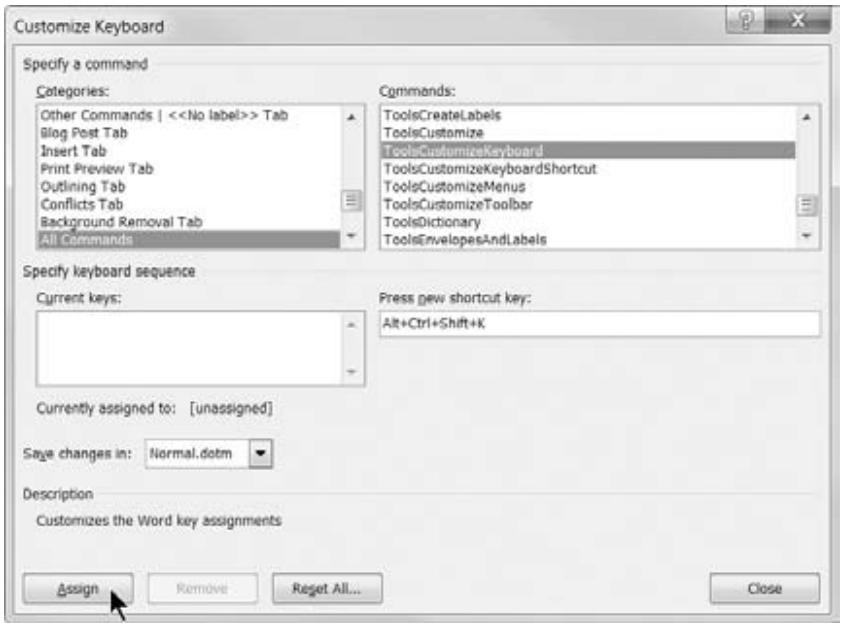
Note

Two paragraphs earlier, I said you can assign *just about any* key to just about any command. Why "just about any" rather than "any"? Because Word doesn't want you to shoot yourself in the foot. For example,

suppose Word were to let you assign the "e" key to a command. That might cause problems. You likely need the "e" key for typing things like "Help!" So, you can't reassign the "e" key here. Moreover, the Tab key is used as a navigation key within the dialog box itself, so if you press Tab while in the Press new shortcut key box, the focus is shifted to Save changes in. Therefore, that tab key is taboo, at least in the Customize Keyboard dialog box. Other keys, such as Enter, F1, Shift+Enter, and Esc are also off-limits in the Customize Keyboard dialog box, so if you need to assign the off-limits keys, you'll need to do so using VBA (Visual Basic for Applications, the language used for recording and writing Word macros). See Chapter 49 for more details about VBA. ■

FIGURE 45-2

If you think that the route to the full Customize Keyboard dialog box is too long, assign a shortcut!



While it seems almost blasphemous to assign a toolbar shortcut for a way to create shortcut key assignments, you can put the Customize Keyboard tool onto the Quick Access Toolbar. Right-click the QAT and choose Customize Quick Access Toolbar. Set Choose Commands From to All Commands. Click in the long list of commands and tap the D key to zoom to just below the end of the list of commands that start with C. Six commands up from the first D command, click Customize Keyboard, and then click Add to put it into the QAT list. Click OK and you're done.

Now that you can travel at high speed to the Customize Keyboard dialog box anytime you want, the rest of this chapter should be a breeze. Just keep your seatbelt fastened, and your eyes on the road.

Categories

To help you find commands more easily, they are organized into a number of categories: Office Menu, Home Tab, Insert Tab, Page Layout Tab, References Tab, Mailings Tab, Review Tab, View Tab, Developer Tab, and so on. You should see a pattern in these. These are the same names as the major ribbon tabs, so if you're looking for a command that resides in the Home tab, try setting Categories to Home Tab. If you're looking for a References command, set Categories to References Tab.

As you travel down the list of categories, you run out of the main ribbon tabs and start to hit the specialized tabs, such as Add-Ins. Just in case you're wondering, Add-Ins corresponds to the commands you'll find in File ➪ Options ➪ Add-Ins. For each of the specialized ribbon tabs, you'll find a category listed, such as SmartArt Tools Design, Chart Tools Layout, and Ink Tools Pens.

A little further down, you come to one of my favorite categories: Commands Not in the Ribbon. This category is home to a number of legacy Word commands. If there's something from Word 2003 or earlier that seems to be MIA, take a look here to see if you can find it.

Further down still, you'll come to All Commands, which has *almost* all of Word's commands in it, but not quite. Though it might seem easier to look in smaller categories, it's sometimes frustrating, because there's no guarantee that the command you seek is in the category that seems most logical to you. Your logic might not be the same as the Microsoft programmer who designed the categories. For that reason, sometimes your best shot is to shoot for the All Commands list. If it's not there, then it's not anywhere.

Toward the bottom, we come to Macros, Fonts, AutoText, Styles, and Common Symbols. We look at these a bit more closely later in this chapter, and at Macros in Chapter 49.

Commands

With so many nice categories, you might think it would be simple to find the command you're looking for. Alas, it's often like looking for a needle in a haystack. The difficulty in determining what a particular command is called might explain in part why so few Word users take full advantage of the option to customize the keyboard.

To help you in this quest, notice the Description section of the dialog box. As you scroll through the commands, a description of the command is listed there. That might help you when trying to locate the command you're looking for.

Several tricks and tips can help you zero in on a command more quickly:

- Use the cloverleaf trick. Press Ctrl+Alt+Plus Sign (on number pad), and then click the tool that corresponds to the command you're looking for. See Figure 45-1 and the accompanying text for more on this method.
- Run the ListCommands command to generate a list of all Word commands, and then search through that list to find the name of the command. See the next section for more on this method.

- Record a macro to do what you want, and then look at the macro's VBA listing to see what the commands are called. See Chapter 49 for more on this method.

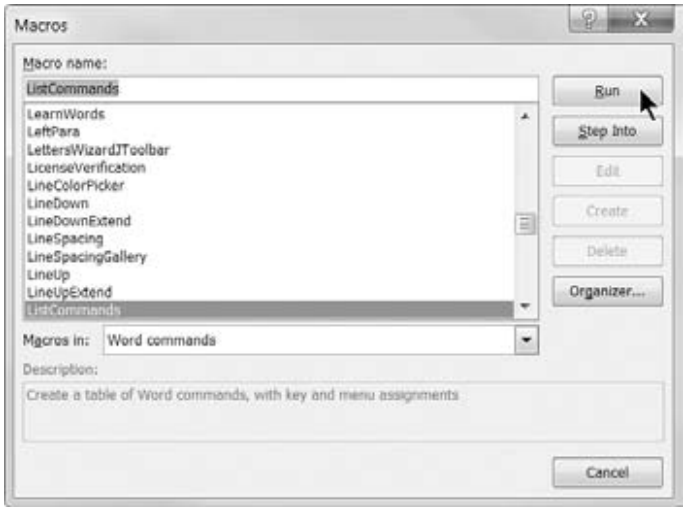
List Commands

Word has a built-in command that few Word users know about: ListCommands. This command creates a new Word document that contains a full list of Word's commands. Because it's a Word document, it is completely searchable, and provides a handy way to find out what a particular command is called.

In the Developer ribbon tab, click Macros. In the Macros dialog box, shown in Figure 45-3, under Macro name type **ListCommands**. Note that this name does not contain any spaces. In addition, notice the buttons at the right as you type this. Until you type the "s" at the end of the command name, only the Create, Organizer, and Cancel buttons are active. Once you type the "s" character, however, the Run and Step Into buttons spring to life. That means that the command or macro name you've typed actually exists!

FIGURE 45-3

When you type the name of a command or macro that exists, the Run button becomes available.



Click Run. This causes the List Commands dialog box to appear, as shown in Figure 45-4. To list all commands, choose All Word commands. Word responds by creating a new Word document with a three-column table: Command Name, Modifiers, and Key. Modifiers are the shifting keys you press, and Key is the main active key you press. For example, Alt+Ctrl+ and M, which you see for Annotation (unless you've changed it), means that you would press Alt+Ctrl+M to insert an annotation (press Ctrl+Z if you just now did that and inserted an unwanted annotation into the current document).

FIGURE 45-4

Choose All Word commands to create a list of all Word commands and key assignments. Choose Current keyboard settings to see just a list of commands that already have key assignments (built-in and user-customized).



The listing contains all built-in commands as well as your macros, and all current key assignments. If you've changed an assignment, your assignment will be listed. When there are multiple assignments, there will be separate rows in the table for each assignment.

What we're interested in here, however, is command names, rather than assignments. Suppose, for example, that you remember a command in an earlier version of Word — one you haven't been able to discover in the new "discoverable" interface. Search the list for words or word fragments that are related to the command you seek. There's a good chance that you'll find the command.

When you find a command name, open the Customize Keyboard dialog box, set Categories to All Commands, and look for the command name in the list of commands. As you search, keep in mind that Word commands don't contain spaces. Once you find the command you seek, you can assign it to a keystroke.

Other Methods

The Customize Keyboard dialog box isn't the only way to assign keystrokes to Word commands and tools. Word provides additional assignment methods that are available from other dialog boxes.

Styles

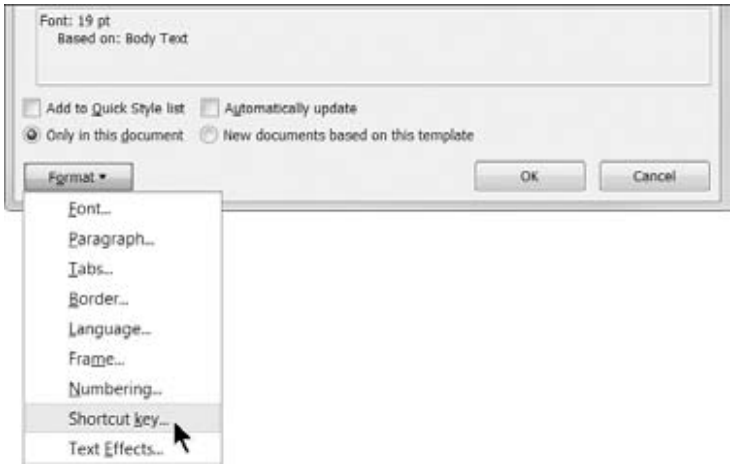
You can assign shortcut keys to styles from the Modify Style dialog box. Press Alt+Ctrl+Shift+S to display the Styles task pane. Scroll to the style for which you want to create a shortcut, right-click it, and choose Modify. In the lower-left corner, shown in Figure 45-5, choose Format ➪ Shortcut key.

This displays the single-purpose version of the Customize Keyboard dialog box, with Categories displaying only the grayed-out Styles category, and Commands listing the selected style. In the

Press new shortcut key field, press the combination you want to use, set Save changes in as needed, click Assign, and then click Close.

FIGURE 45-5

The Format drop-down menu isn't just for formatting!



If you want to assign multiple styles at the same time, this method can get old quickly. Instead, display the full-service Customize Keyboard dialog box as shown in the previous section, and set Categories to Styles. Now you can access multiple styles in the Commands list. If the styles you want aren't listed, see Chapter 9 to learn how to display more styles.

Symbols

A number of symbols already have default shortcut keys assigned to them. For a list, choose Insert ➪ Symbol ➪ More Symbols ➪ Special Characters. To assign a symbol that doesn't have a built-in shortcut, choose Insert ➪ Symbol ➪ More Symbols ➪ Symbols. Using the techniques described in Chapter 20, find the symbol you want to assign and then click the Shortcut Key button at the bottom of the Symbol dialog box.

The single-command Customize Keyboard dialog box is summoned, with Categories frozen at Common Symbols, and Commands listing the symbol you selected. Press the desired shortcut keystroke(s), set Save changes in as needed, click Assign, and then click Close.

For access to multiple symbols, you can go through the full-service Customize Keyboard dialog box, setting Categories to Common Symbols. However, this will not give you complete access to all of the symbols you get when you go through the Symbol dialog box. Hence, if you're looking for something in particular and require the associated encoding, you'll need to go the Symbols route.

Record Macro

When you record a new macro, you can assign a keystroke to the resulting macro. In the Developer tab, click Record Macro. Or, if the Developer ribbon isn't showing, you can click the Record Macro button in the status bar. To enable macro recording and playback from the status bar, right-click the status bar and click to enable Macro Recording, as shown in Figure 45-6.

FIGURE 45-6

You can record and play back macros without using the Developer ribbon.



When the Record Macro dialog box appears, as shown in Figure 45-7, type a name that will help you identify the macro later, add a description in the Description box, set Store macro in as appropriate, and then click Keyboard. This displays the single-command Customize Keyboard dialog box, with the macro name listed.

FIGURE 45-7

The best time to assign a shortcut assignment to a macro is when the macro is created.



Notice that the macro name is an ugly son-of-a-gun named something like Normal.NewMacros .Macro1. You learn how to change this in Chapter 49 if you want to. Follow the procedures outlined earlier to finish making the shortcut key assignment.

Summary

In this chapter you've seen a number of ways to assign shortcut keys to a variety of tools, commands, styles, symbols, and other Word features. You should now be able to do the following:

- Use the cloverleaf method to quickly determine whether a given ribbon tool already has a shortcut key assigned
- Assign shortcut keys to fonts
- Make multi-key assignments to conserve Ctrl/Alt/Shift keys as well as to create logical systems of shortcuts
- Assign a shortcut to a macro that you are creating
- Locate long-lost commands

CHAPTER 46

The Quick Access Toolbar

IN THIS CHAPTER

- Customizing the QAT
- Adding ribbon groups to the QAT
- Rearranging the QAT
- Resetting the QAT to the factory defaults

Just in case you drove here directly from Word 2003, and happened to sleep through the preceding 45 chapters, Word 2010's interface is radically different from that of Word 2003 and earlier. The menus and toolbars have been replaced by the ribbon and the Quick Access Toolbar, or QAT, as it's more affectionately known (pronounced just like the letters: Q A T). Research has shown that most Word users customize little if anything, so the idea was to put just about everything you need in front of you in the ribbon interface so it's there when you need it and to make it ridiculously easy to customize the one remaining toolbar.

Well, they did it. It is ridiculously easy to customize the QAT, but the *Word 2010 Bible* has a chapter about it anyway. So, let's get started.

The What?

The Quick Access Toolbar is the collection of tools that appears at the top of the ribbon (by default), shown in Figure 46-1. The default tools are Save, Undo, and Redo.

There is no practical upper limit to the number of tools the QAT can contain. However, when it holds too many to display all at once, a More control indicator appears at the right end as ▸▸. The additional tools are displayed to the right and below, as shown in Figure 46-2.

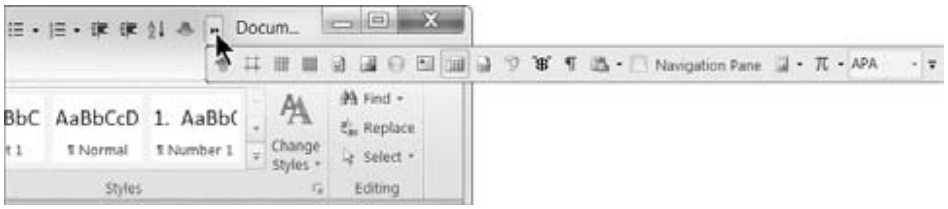
FIGURE 46-1

The default QAT appears above the ribbon, and contains just three tools.



FIGURE 46-2

When the QAT is full, additional tools are dumped into the More button.



Tip

The QAT, while displayed above the ribbon by default, alternatively can be displayed below the ribbon. To move it down, right-click the QAT and choose "Place Quick Access Toolbar below the ribbon." This has several benefits. First, displayed below the ribbon, it can hold more tools before needing to use the More controls device. Second, and possibly more important, if you use the tools a lot, this places them closer to the text. This provides ergonomic benefits, meaning that you don't have to move the mouse and your wrist quite so much. ■

You Call This a Toolbar?

One of the advantages of the toolbars in Word 2003 and earlier was that you could customize toolbars for different documents and templates. Though it might not be obvious, you can do this

with the QAT as well. We look at precisely how to do this a little later in this chapter. For now, however, let's look at several Quick Access Toolbar strategies.

One QAT strategy adopted by many users is to place all of their everyday tools onto the QAT, and to store them in `Normal.dotm`. Those tools are then available all the time.

A variation of this strategy is to store special tools used only some of the time in templates and documents in which they are used. For example, you might use some tools only when creating forms. There's simply no reason for them to clutter up your QAT the rest of the time. In that case, store those tools only in forms templates.

Other tools might be useful only when writing long documents that have a bibliography, footnotes, and citations. Why not store those tools only in the templates you typically use for creating such documents?

Of course, if the only template you ever use is `Normal.dotm`, the issue of where to store tools is moot. If you heed the advice of this book, however, you will make use of a variety of templates. As you discover task-specific tools you need, consider having those tools at the ready only when they're needed.

Customizing the Quick Access Toolbar

As suggested at the beginning of this chapter, customizing the Quick Access Toolbar could hardly be any easier. For commands and tools displayed in the ribbon, adding them to the QAT is simple. The only difficulty may be finding out what commands are called when what you need isn't available in the ribbon.

The QAT Top Eleven

To help you hit the ground running, Word makes it really easy to place up to eleven popular commands on the QAT without having to visit the Customize Quick Access Toolbar dialog box, which you'll see shortly. At the right end of the QAT, as shown in Figure 46-1, click the Customize QAT button. By default, three popular commands are already checked. Click to enable any or all of the eight additional commands shown.

Adding Commands to the QAT

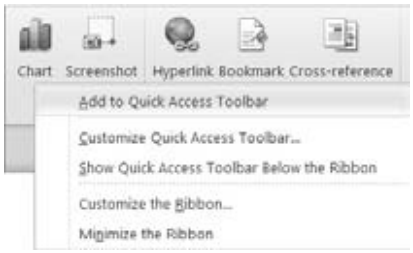
To add a ribbon command/tool to the QAT, right-click the command/tool and choose Add to Quick Access Toolbar, as shown in Figure 46-3.

Adding Groups/Chunks

You can also add entire sections or command groups to the QAT. This might be useful, for example, when creating a special QAT in a particular document template. To add a group to the QAT, right-click the title for that group and choose Add to Quick Access Toolbar.

FIGURE 46-3

Right-click almost any tool and choose Add to Quick Access Toolbar to add a tool to the QAT.



When you add a group to the QAT, the individual tools aren't added. Rather, a tool representing the group as a whole is added. When you click that tool, the group is then revealed, much the same way that the More controls button reveals tools that do not fit on the QAT.

When you add the Styles group (from the Home ribbon tab) to the QAT, it appears as shown in Figure 46-4. Clicking on it then displays the whole Styles group, just as it appears in the Home ribbon. When you think about it, you could probably add just about all of the different ribbon groups to the QAT and never display the ribbon at all (press Ctrl+F1 to toggle it off and on, or double-click any ribbon tab). A ribbonless Word 2010 might be difficult to get used to, but it would provide a way to maximize your screen real estate. Ribbon? What ribbon?

FIGURE 46-4

You can add entire groups to the QAT.



Removing Commands

Removing commands or other items from the ribbon is even easier than adding them, because you don't have to go looking for them. Right-click the offending item and choose Pluck it out! Okay, not really — just a little Biblical humor. Right-click and choose Remove from Quick Access Toolbar.

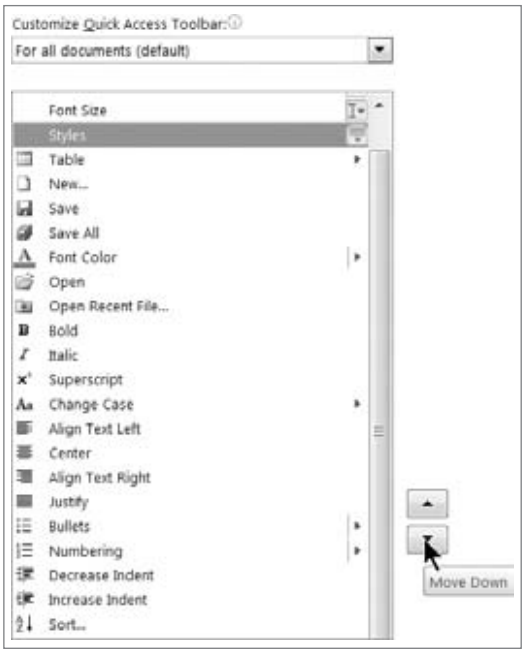
Rearranging

Rearranging the QAT isn't quite as easy as rearranging toolbars in Word 2003 and earlier. Recall that in Word 2003, you could hold down the Alt key and drag tools wherever you wanted them to go. In Word 2010, the method is a bit different.

Instead, right-click the QAT and choose Customize Quick Access Toolbar. In the right half of the dialog box, click to select the command you want to move, as shown in Figure 46-5. Point the mouse at the Move Up or Move Down buttons, and click until the command is where you want it to be. It's not quite as easy or intuitive as dragging them, but it works.

FIGURE 46-5

Use Move Up and Move Down buttons to rearrange the QAT to suit your needs.



The Customize Quick Access Toolbar Dialog

So far, we've focused on the easy aspects of customizing the Quick Access Toolbar. When you know exactly what command to add and where it is in the ribbon, it's very simple to add it. When it's not directly accessible on the ribbon (for example, available only from inside a dialog box or other control) or not obviously available at all (as in the case for certain legacy commands), finding the correct command name can sometimes be an ordeal. The chore isn't made any easier by the fact that command names used for the Quick Access Toolbar are not always

the same as command names used in the Customize Keyboard dialog box. Hence, the cloverleaf method for discovering a command's name doesn't always help when it comes to the Quick Access Toolbar.

Displaying the Main QAT Customization Dialog

To display the main dialog box for customizing the QAT, right-click the QAT and choose Customize Quick Access Toolbar. Note that you can also get here by choosing File ➪ Options ➪ Quick Access Toolbar, but that's such a circuitous route, it's hard to imagine why anyone would do it. Under Choose commands from, the different commands are organized into 37 categories, as shown in Figure 46-6, similar to the Customize Keyboard categories you saw in Chapter 45.

Tip

Placement of commands in different categories isn't always 100% logical. You often can save time by going directly to the All Commands list, rather than spend time searching through smaller, non-alphabetized and often evasive and misleading category names. Note, however, that the command names are *not* the same as the command names in the Customize Keyboard dialog box . . . just to make things more challenging. ■

Setting the Storage Location for the QAT

The customizations for the QAT can be stored in the current document or in `Normal.dotm`. As shown in Figure 46-6, the default storage location is called For all documents (default). This means `Normal.dotm`.

Use the drop-down arrow to select an alternative location, if desired. If a document is open, you will always have two options: For all documents and the current document. If the current document is based on a different template, that template is not listed as a separate option. To save QAT changes to that template, you would need to open the template itself — not simply a document based on it — and do the modifications there. Once done, however, QAT customizations stored only in that template will now be available to documents that are based on it.

Finding Commands

In the left half of the dialog box, for commands ending in an ellipsis (`...`), you can hover the mouse over a command to see the full name and the ribbon location of the command. Different steps, usually indicated with ➪ in the *Word 2010 Bible*, are indicated using the | character, as shown in Figure 46-7. If you want to add the Select Objects tool to the QAT, for example, you can confirm that this is the tool you're looking for by choosing Home ➪ Editing group, and seeing if the tool that is there corresponds to the one you're looking for.

FIGURE 46-6

To customize the Quick Access Toolbar, you can choose from among 37 different categories.

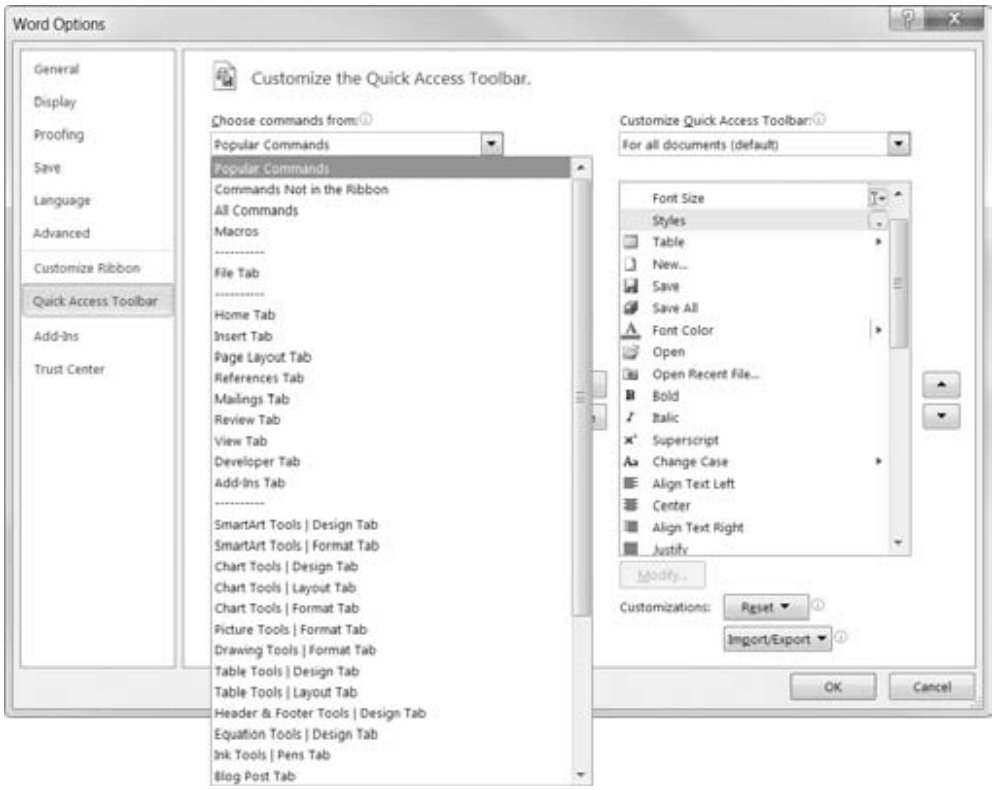
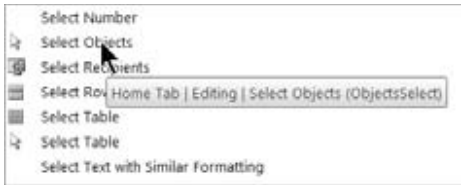


FIGURE 46-7

If you hover the mouse pointer over a command, a tooltip tells you where the command ''lives'' and its full name.



Adding Commands to the QAT

To add a command to the Quick Access Toolbar, select it in the left half of the dialog box and click Add. Then, as noted earlier, use the up and down buttons to move the tool to where you want it.

Separator

Some users find it useful to separate related groups of commands. Note <Separator> at the top of the list of commands. You can add one or more separators to group commands.

Removing Tools from the QAT

To remove a tool from the QAT, click the tool in the right half of the dialog box and click Remove. Note that it's usually easier to remove a button directly from the QAT by right-clicking and choosing Remove from Quick Access Toolbar. You might use the Customize Quick Access Toolbar method when you're doing a number of changes at the same time.

Resetting the QAT to the Default

If you decide for any reason that you want to remove all customizations made to the QAT, it's easy. With the QAT customization dialog box showing, first set the location of the QAT you want to reset by using the drop-down arrow in the upper-right part of the dialog box. If you want to reset the QAT only in the current document, then set that drop-down accordingly. To reset the QAT stored in `Normal.dotm`, set the drop-down to For all documents (default). Then click Restore Defaults ➪ Restore Only Quick Access Toolbar. Word prompts as shown in Figure 46-8; click Yes to confirm.

Note

After clicking Yes, you're still not done. If you click Cancel (or press Esc) rather than OK, the reset action will not be done. This gives you a fallback option if you change your mind. ■

FIGURE 46-8

Word prompts to confirm before resetting customizations.



Summary

In this chapter you've learned the easy ins and outs of modifying the Quick Access Toolbar. You've learned how to add and remove commands and ribbon groups to it, how to save QAT changes only to the current document, and how to reset your changes. You should now be able to do the following:

- Rearrange QAT commands
- Place the QAT above or below the main ribbon
- Work largely without the ribbon by careful selection of QAT commands
- Find commands in the QAT Customization dialog box

CHAPTER 47

The Ribbon

Many power users who upgraded from Word 2003 to Word 2007 were disappointed that the menu and custom toolbars were things of the past. They were also frustrated that the user interface did not provide a way to customize the ribbon. Sure, one could delve into RibbonX programming, but for many, that seemed like too much work. In Word 2010, though the menus and toolbars of yore are still gone, the ribbon is now customizable. If you're willing to invest a few minutes, you can turn the ribbon into a collection of tools that better suit your own needs. If you're truly evil, you can even make your colleagues think they're going crazy. But, since this is a Bible, I'll leave the evil entirely up to your own devices.

In this chapter, you learn about how to customize the ribbon — how to turn off features you don't use, and how to replace them with tools that better match your needs. You also learn how to share ribbon customizations by exporting what you create or by importing someone else's.

IN THIS CHAPTER

Customizing the ribbon

Reducing clutter

Exporting and importing ribbon customizations

Customize the Ribbon Dialog

The easiest way to start is by right-clicking the QAT or any blank area in the ribbon or tab headers, and choosing Customize the Ribbon, as shown in Figure 47-1. This opens Word Options to the Customize Ribbon tab, shown in Figure 47-2.

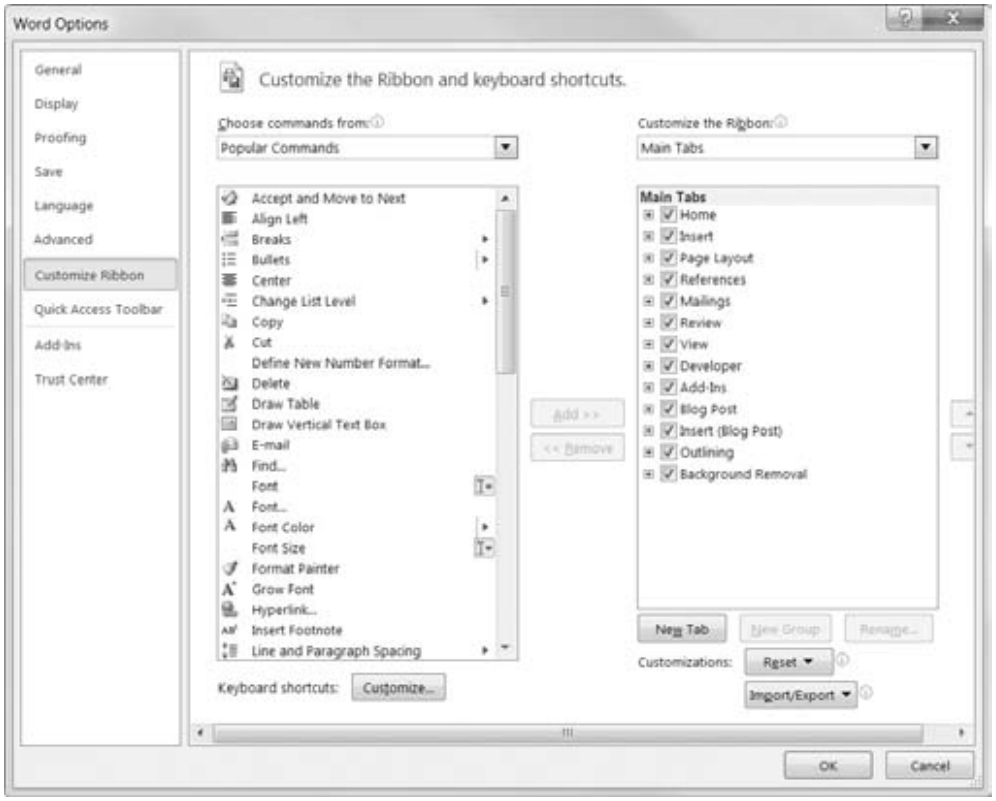
FIGURE 47-1

Right-click the QAT or a blank ribbon area for quick access to customization tools.



FIGURE 47-2

The Customize Ribbon tab is also where you go to customize the keyboard.



Command Central

The left panel is your palette, so to speak. This is the source of commands and macros. Use the Choose commands from drop-down list to choose a category, as shown in Figure 47-3. If you don't know exactly where the command you seek resides, All Commands usually is the best place to look. On the other hand, if you have an idea of where the command resides, choosing the appropriate category or tab can save some time.

FIGURE 47-3

If you don't know where a command is, you can't go wrong with All Commands.



When looking for commands, click in the command list and tap the first letter of the command name you're looking for to accelerate to that part of the alphabet. Unfortunately, the command list is not searchable, and it sometimes takes a bit of hunting to find any given command.

If you're looking for a command that normally resides in a specific tab, set Choose commands from to All Tabs. This organizes the list of commands by tab, showing only commands that are already somewhere in the ribbon. Suppose, for example, that you're looking for the Bring Forward tools. Expand the Page Layout tab by clicking the +, then expand the Arrange group, as shown in Figure 47-4. This exposes the Bring Forward tools, which you can now add to a custom group either by dragging or by clicking the Add button. More on custom groups when I discuss adding custom groups in a short while.

Moving Tabs and Groups

Using the Up and Down buttons shown in Figure 47-5, you can move built-in and custom tabs and groups up and down, rearranging them however you see fit. You can also move by dragging.

You cannot move the built-in tools around. However, if you have custom groups and tabs, you can move tools that they contain.

Turning Tabs On or Off

Many people learn by example, so I'll show you how to turn on the Developer ribbon. By default, Word has the Developer ribbon turned off. Many Word users never need it, but most experienced Word users do. If you haven't yet turned it on, right-click the QAT and choose Customize the Ribbon. In the right panel, Main Tabs is selected at the top. Note Developer, between View and Add-Ins. By default, Developer is unchecked. Click to place a check next to it, then click OK. Suddenly, the Developer tab appears in the ribbon!

It's that simple. Suppose you never use the Mailing ribbon. You can hide that tab to simplify what you see. Remove the check next to Mailing, and presto! If you later decide that you need the Mailing ribbon after all, right-click the QAT, choose Customize the Ribbon, place a check next to Mailings, and you're back in the mailing business.

FIGURE 47-4

Expand tabs and groups until you find the command you're looking for.

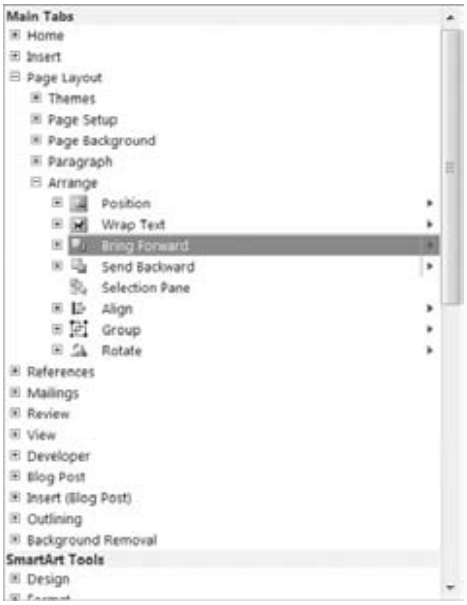
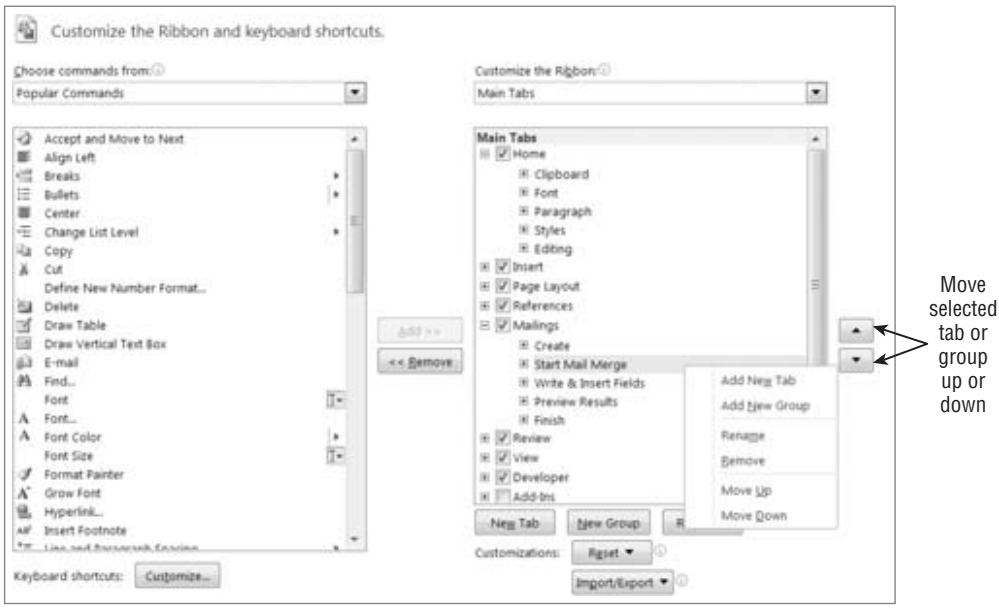


FIGURE 47-5

Right-click a group and click Remove to deep-six it from a ribbon tab.



Removing Groups

Often, it's more likely that you don't use specific tools or groups, rather than entire ribbon tabs. But groups don't have checkmarks — so how do you remove them? Suppose, for example, that you do use envelopes and labels (in the Create group), but you never do mail merge, and you hate clutter. One possibility then would be to remove all of the groups except for Create within the Mailings tab.

To do this, expand the Mailings tab as shown in Figure 47-5. Right-click Start Mail Merge, and click Remove. Repeat this for the next three groups, as well. When you're done, click OK to view your handiwork.

But, what if you only ever need the envelope feature, and never work with labels? Is there a way to remove individual tools?

Sorry, but you can't do that — at least not with built-in groups. Expand the Create subgroup, as shown in Figure 47-6. Notice that all of the items are grayed out, and when you right-click them, nothing happens. For built-in groups, it's all or nothing. But, hold that thought. As you'll learn later, there is a way to accomplish your aim, albeit not in the most direct way.

FIGURE 47-6

You cannot remove tools from built-in groups.



Suppose you change your mind, however, and decide that you do need mail merge after all. How do you get the groups back? Unlike the case with tabs, there are no checkboxes. The groups are gone!

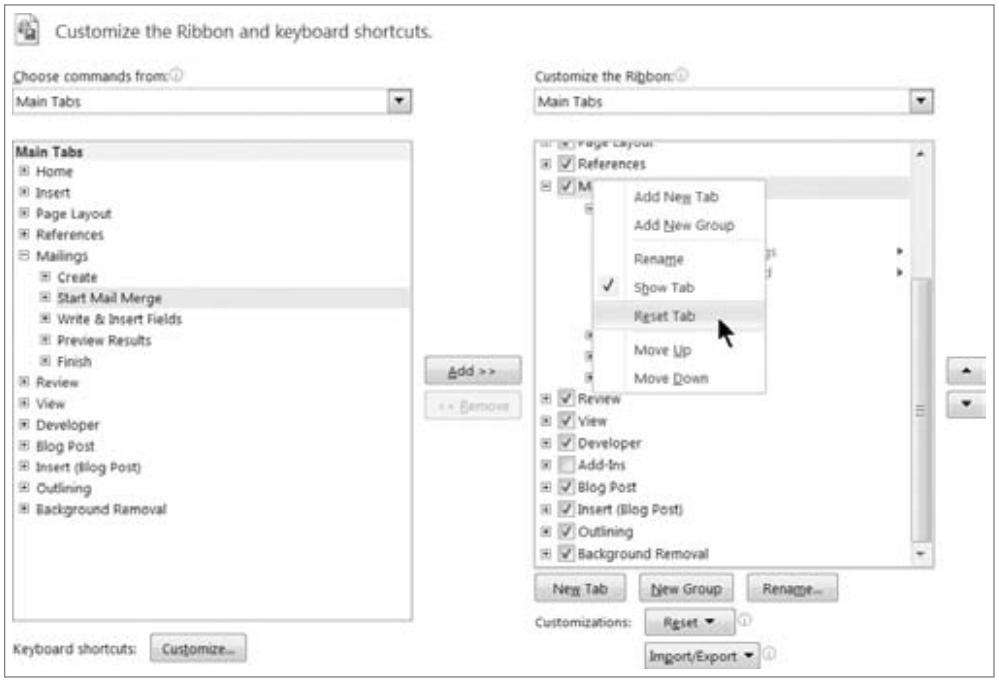
Well, they're not really gone. They've just retreated to their homes because they felt unwanted. Remember Command Central? That's where they live. In the commands side of the Customize Ribbon dialog box, choose Main Tabs, and expand Mailings. Drag each of the previously removed groups from the left panel into the right, to their former locations. Or, if you want to restore the tab to its original contents, use Reset, as shown next.

Resetting Tabs

If you decide that you want to remove all customizations from a ribbon tab, you do not need to remove them one at a time, or drag any removed items back to the tab. In the right panel in the Customize Ribbon dialog box, right-click the tab you want to restore, and choose Reset Tab, as shown in Figure 47-7.

FIGURE 47-7

Restoring a tab to its factory default is just a right-click away.



You can also do this using the Reset drop-down. That drop-down option lets you remove all customizations, or just the selected tab.

Caveat Reset

Not only can you reset a tab, you can, in fact, remove all ribbon customization, as well. Click the Reset button near the bottom of the Customize Ribbon dialog box, and choose Reset All Customizations. Whoops! If you're like me, you didn't expect the message box shown in Figure 47-8. Personally, I expected this to reset only ribbon customizations — not all QAT customizations, as well! Unless you want your QAT customizations to be deleted, do not click Yes!

If you head to the Quick Access Toolbar customization dialog box, there you'll discover a choice to reset only the QAT or All. Unfortunately, the Reset button in the Customize Ribbon dialog box doesn't let you reset just the entire ribbon in one fell swoop.

FIGURE 47-8

Reset All Customizations applies to the Ribbon and to the Quick Access Toolbar.



Instead, if you have customized the ribbon and want to remove all ribbon customizations, you will need to do that one tab at a time. Click on the tab that you customized, click the drop-down arrow next to Reset, and choose Reset only selected Ribbon Tab. Word does not prompt to confirm. Note that as with other ribbon customizations, the change does not take effect until you click OK to close the Word Options dialog box. If you click Cancel, instead, the reset won't happen.

Caution

When editing the ribbon, changes applied do not take effect until you click OK. If you're performing careful and meticulous changes, beware of inadvertently dismissing the dialog box by pressing Escape, or however else. ■

Adding Groups

If you find that you're having to change tabs more often than you like, you can place commands and groups into tabs where they better suit your purposes. Suppose, for example, that you don't consider templates and document protection to be developer tools, because you're not a developer. You can put them where you prefer (within limits), and then turn the Developer tab off to reduce clutter.

Add the Protect group (from Developer) to the Home ribbon. Set both left and right panels in the Customize Ribbon to Main Tabs, as shown in Figure 47-9. Click on the source (Protect) in the left panel, and drag it into the right panel, where you want it to appear.

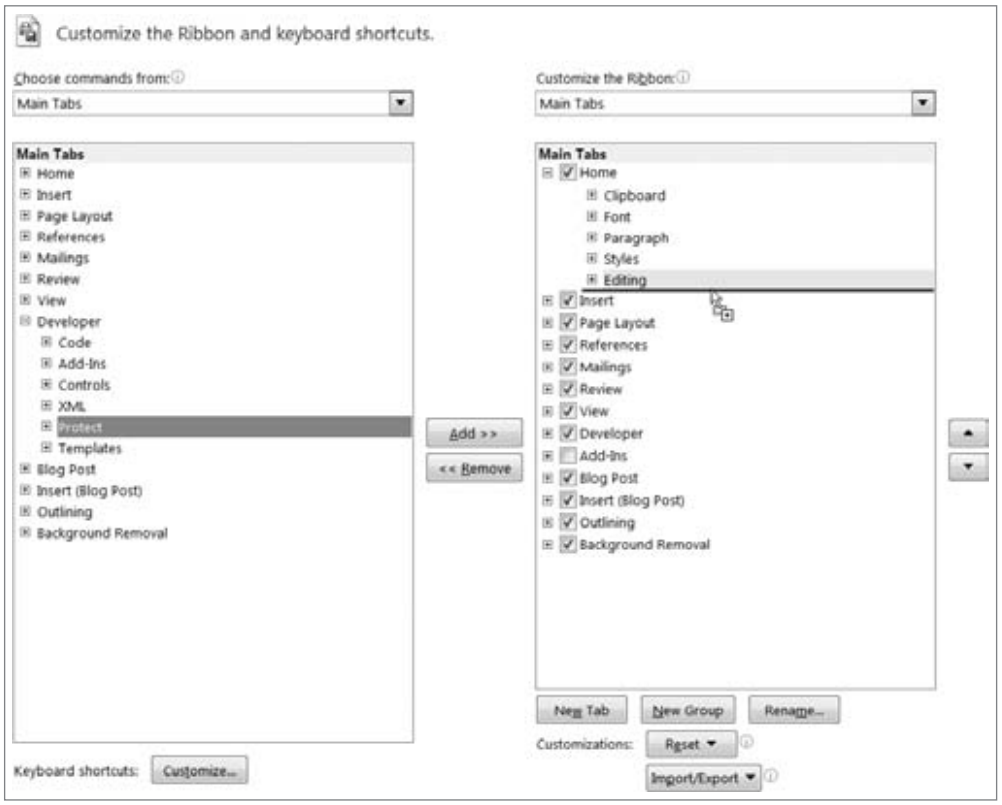
What if there isn't enough room? If there isn't enough room, Word will display groups in more compact form. In the case of the Home ribbon tab, Word shrinks the Styles gallery first. When the gallery reaches three styles, it next shrinks the Paragraph group. Does this make the tools too compact? You be the judge — you're in control!

Adding Custom Groups

Earlier, I said that you can't remove or add tools within a built-in group. So, what do you do if a group contains one or more tools you never use, but doesn't contain some tools that you do use?

FIGURE 47-9

Drag often-needed tools into ribbons where they will be more visible.



Build your own group, then hide the original.

Suppose that you use SnagIt rather than the Screenshot tool, in the Insert ribbon. It just takes up space. Instead, you'd rather have the Equation tool in that slot.

To do this, you would add a new group — which you might later rename Illustrations (or Exhibits, if you prefer). Then, populate that group with just the tools you want. Finally, remove the unneeded built-in group.

To add a group, in the Customize Ribbon dialog, set both left and right panels to Main Tabs. Expand the tab you're working on, and right-click the group you want to replace. Choose Add New Group. New Group (Custom) is added under the group you right-clicked, as shown in Figure 47-10.

Either right-click the new group and choose Rename, or click the Rename button. Type the group name into the Display name field, and click OK. Note that the icons in this dialog box do not affect the ribbon groups' names.

FIGURE 47-10

New groups are inserted before or after existing groups — not within them.



Next, expand the source group (Insert ➪ Illustrations, in this example), and drag the desired items into the new group. Note that you can also drag items that are within collapsed headings (such as New Drawing Canvas, which is within Shapes).

Next, expand the tab or group at the left that contains the "foreign" tool you want to add to the new group (in this example that would be Insert ➪ Symbols, to expose Equation). Drag the tool (Equation) into the custom group.

Next, because you're essentially moving Equation from the Symbols group to your custom group, remove Equation from Symbols. In the right panel, expand Symbols, right-click Equation, and choose Remove.

Oh, wait! You can't do that, can you?

You probably saw this coming. It's a ripple effect. To truly accomplish the move, you would need to also create a new Symbols group, and populate it just with the Symbol tool.

Go ahead. I'll wait.

All done? Okay, finally, right-click the built-in Symbols, and choose Remove. Remove the built-in illustrations group the same way. Click OK and admire your handiwork, shown in Figure 47-11.

FIGURE 47-11

A customized Insert tab in which Equation has been moved from Symbols into a new group named Exhibits



Adding Custom Tabs

You can rebuild Word's interface completely, if desired. Well, except for the File (Backstage) tab. That one resists user modification. Except for that, however, you can replace all of the built-in tabs and groups with your own. As a practical matter, this might be useful for a specialized project and/or to reduce the amount of learning time needed.

To add a custom tab, display the Customize Ribbon tab. In the right panel, the new tab will go immediately below whatever tab is currently selected. Select the destination tab, and click the New Tab button. Or right-click the destination tab, and choose Add New Tab. If you don't like the location, use the Up and Down buttons to move the tab to where you want it. Or, drag it to the desired location. In either case "where you want it" has to be before or after existing tabs. You cannot put a tab between groups.

When you create a new tab, Word automatically creates a new group, as well, as shown in Figure 47-12. This saves you a necessary step, because a tab with no groups is pretty useless.

FIGURE 47-12

When you create a new tab, a new group is created automatically.



Removing Custom Tabs

You cannot remove built-in tabs — you can hide them, but not remove them. User-created custom tabs, however, can be hidden or removed. The ability to hide them allows you to create a library of custom tabs, essentially, and to turn them on or off as needed. Using this approach, Word 2010's interface can be considerably more fluid than Word 2007's.

Importing and Exporting Ribbon Customizations

You can export and import customizations. This allows you not only to share your custom interface changes, but to quickly load either your own stored custom interface or one provided by someone else. To export your ribbon customizations, display the Ribbon Customization dialog box, and choose Import/Export ➪ Export All Customizations. Word saves the file in `.exportedUI` format, saving to your My Documents folder.

To open a saved customization file, choose Import/Export ➪ Import Customization File. The `.exportedUI` format is the only one supported.

Summary

In this chapter you've learned how to customize the ribbon — adding built-in groups to different tabs, creating your own groups and tabs, and rearranging the furniture to suit your needs. Among many other things, you should now be able to do the following:

- Turn built-in tabs and groups on and off at will
- Move tabs and groups around
- Create custom tabs to house commands you need
- Effectively move anything around by creating your own versions of built-in tabs and groups

CHAPTER 48

Options and Settings

If you don't like something about the way Word works, there's a good chance that you can change it. The problem usually isn't whether you can change something. Rather, the issue is finding out where to change it. Armed with the index of the *Word 2010 Bible,* it is hoped that you can surmount that problem.

In this chapter, you learn about all of the different options you can change in Word. In a few cases, you are referred to more detailed discussions in other parts of the book. For the most part, however, you'll find everything you need to know about changing Word's options in this chapter.

IN THIS CHAPTER

Personalizing Word

Changing display options and Save options

Advanced options

Managing add-ins

Trust Center settings

Accessing Options

In past versions of Word, options were stored in a variety of locations. In Word 2010, they're pretty much centralized in one location: Choose File ➪ Options. Some feature-oriented options can still be found in other locations — such as those for labels, various formatting defaults (for example, the default font), styles, and captions. Most settings and options, however, can be found under the Word Options umbrella, shown in Figure 48-1.

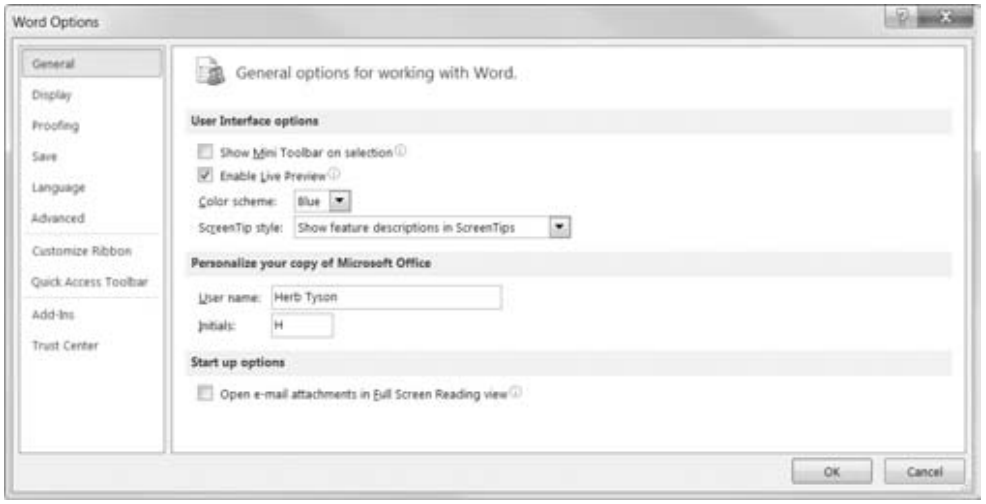
Word Options is divided into ten tabs, or sections:

- General
- Display
- Proofing
- Save
- Language

- Advanced
- Customize Ribbon
- Quick Access Toolbar
- Add-Ins
- Trust Center

FIGURE 48-1

The Word Options dialog box is Central Command for controlling how Word goes about most of its business.



Although these tabs are reasonably good indicators of what you'll find and where to find it, it is by no means perfect. For example, General contains a number of display-related settings. Display contains a number of printing options. Moreover, Advanced contains settings of just about every variety.

If you're looking for a particular setting, start with General. If one of the other non-Advanced tabs looks promising, check there next. If that fails, take a look in Advanced, noting that it has a number of subsections. Though those subsections aren't perfect either, they are a good place to start. Of course, you can also use the index in this book.

Other Routes to Options

While File ➪ Options gets you to the main Word Options dialog box, the Options button from other dialog boxes sometimes takes you there as well. For example, if you click the Page Setup launcher in the Page Layout ribbon, in the Paper tab, the Print Options button in the lower-right corner magically transports you to the Display tab in the Word Options dialog box. This might confuse you until you notice that the bottom section is called Printing Options.

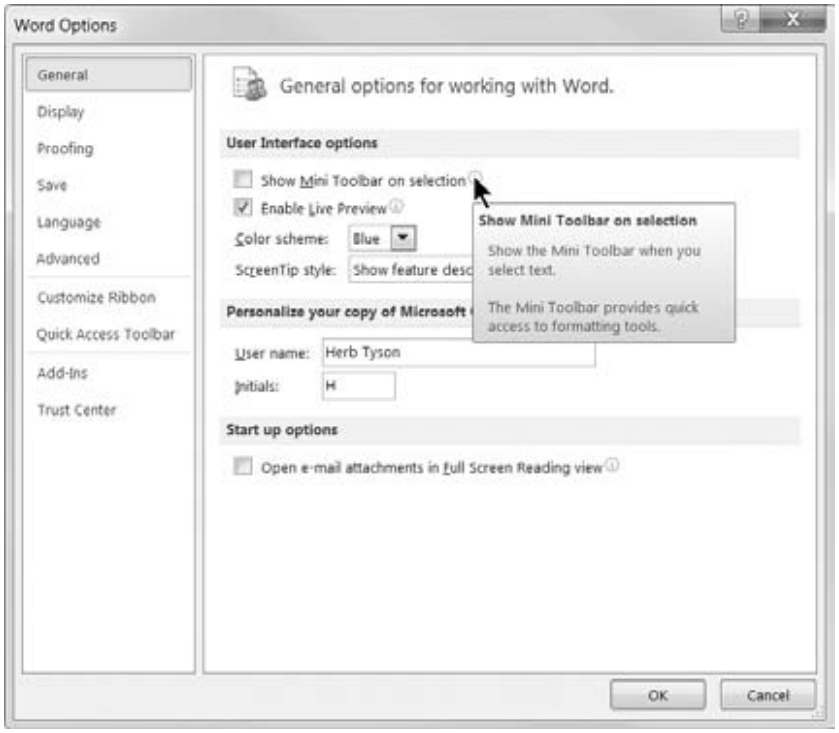
Those aren't all of the printing options, of course. You can find many more in Word Options' Advanced tab, under Print and When Printing This Document. The latter, however, we don't usually think of as options. When talking about options, we're usually talking about settings that affect all of Word, not just a single document.

Information Tips

As you scroll through different sections of the Word Options dialog box, notice that several icons feature a lowercase "i" in a circle. Hover the mouse over these, as shown in Figure 48-2, to see a tooltip describing the feature to the left of the "i."

FIGURE 48-2

Hover the mouse pointer over information icons to see a description of the option.



The Rest of the Chapter . . .

Whenever possible, because the entire Word Options dialog box is so huge, this chapter takes some license in presenting screen shots. Now that you've already seen the ten main tabs or sections (General, Display, Proofing, and so on), the screen shots used in this chapter will show

only what you need to see to follow the discussion. That means a liberal amount of resizing of the dialog box window and cropping out stuff you've already seen.

In addition, to save wear and tear on your patience, rather than repeatedly say "Click File ➪ Options . . . " for the rest of this chapter, I'm going to assume that you know how to activate the Word Options dialog box, and that the relevant tab is onscreen as it's being described. That said, click File ➪ Options ➪ General to get started.

General

The banner headline for the General tab, shown at the top of Figure 48-1, indicates that this is the place to set "General options for working with Word." Note that while it says "with Word," some of these, indicated in the following list, affect all of Office 2010, not just Word. The general options are:

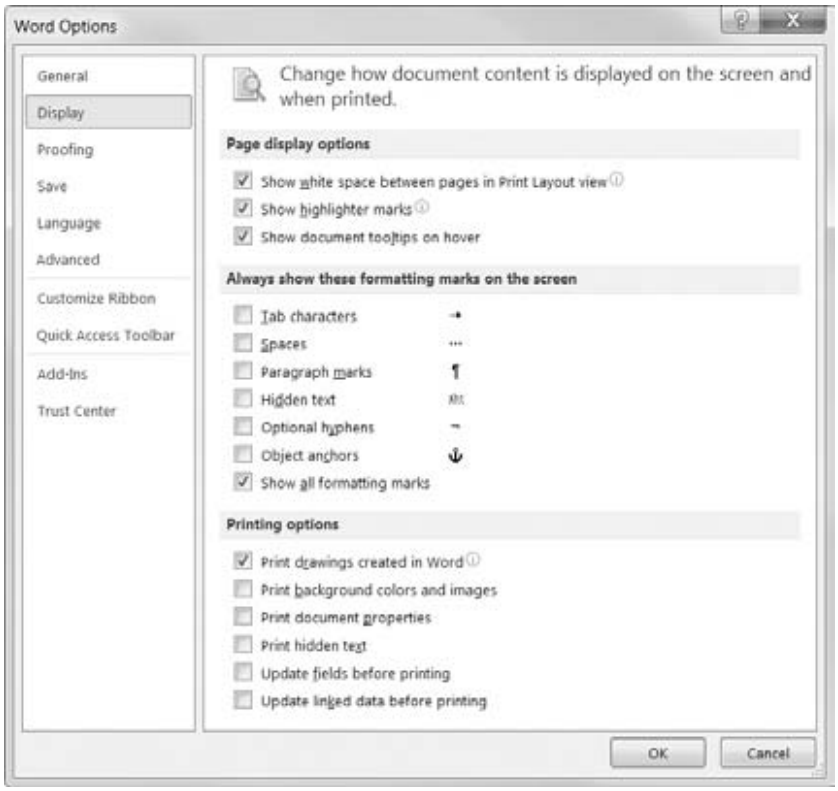
- **Show Mini Toolbar on selection:** The Mini Toolbar contains a number of common formatting tools. See the discussion in Chapter 1, and especially Figure1-13 .
- **Enable Live Preview:** Live preview shows the effects of specific formatting options in the current document. See Chapter 1 for an introduction to live preview.
- **Color scheme:** Office 2010 enables you to choose between three color schemes: Blue, Silver, and Black. This setting affects all of Office 2010.
- **ScreenTip style:** This provides three different options regarding how to display ScreenTips (also known as Super ToolTips): Show feature descriptions in ScreenTips (the default, which shows them in full glory); Don't show feature descriptions in ScreenTips (which shows only the command name); and Don't show ScreenTips (which suppresses them entirely). This affects all of Office 2010.
- **User name and Initials:** User name and initials are used by a number of Word features, such as comments, reviewing, and document information. This setting affects all Office 2010 applications that use user name and initials.
- **Open e-mail attachments in Full Screen Reading view:** By default, when you click a Word document attachment in an e-mail message, Word opens that attachment in Full Screen Reading view. Most Word users seem to hate this default, and are delighted to learn that it can easily be turned off.

Display (and Printing)

The Display settings, shown in Figure 48-3, affect how certain aspects and attributes are displayed and printed. The most popular among these include the display of nonprinting formatting marks. If the settings you seek aren't here, check in the Advanced tab, where a number of additional display and printing settings are listed under Show Document Content, Display, Print, and When Printing This Document.

FIGURE 48-3

A number of ''Display'' settings affect printing, too.



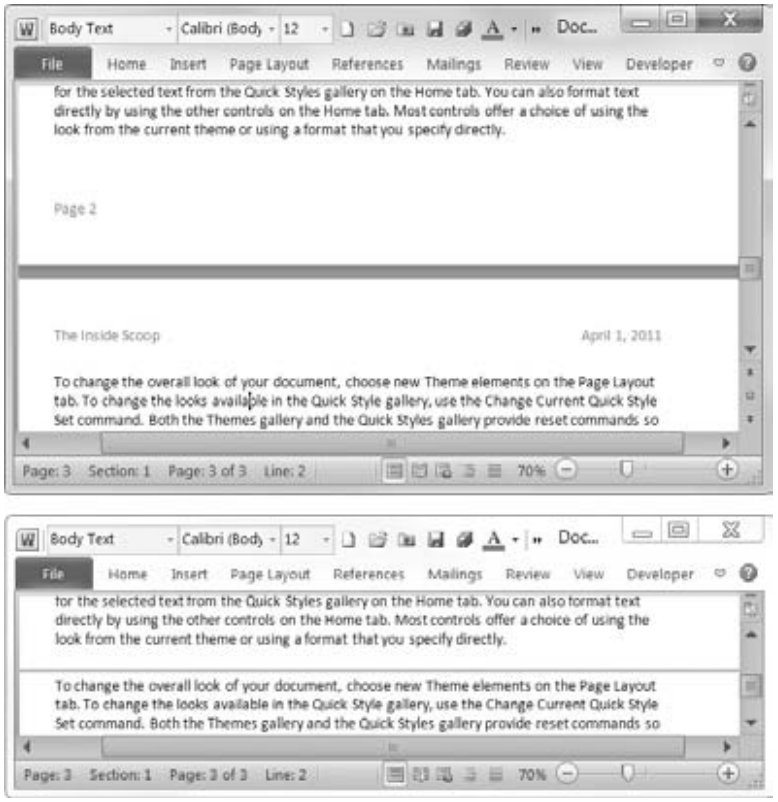
Page Display Options

Common page display options are as follows:

- **Show white space between pages in Print Layout view** (see Figure 48-4)**:** This setting is enabled by default, and provides an accurate page preview. Turn this feature off if you'd rather see more text at one time — for example, when proofreading text for continuity and flow.
- **Show highlighter marks:** If the text contains any highlighting, when this setting is enabled, highlighting is displayed onscreen as well as printed.
- **Show document tooltips on hover:** This controls the display of a wide variety of different tooltips, including tracked changes, footnotes, and endnotes. This does not affect the display of ScreenTips, also known as Super ToolTips.

FIGURE 48-4

With ''Show white space between pages in Print Layout view'' enabled, you get an accurate page preview, but you see less text.



Nonprinting Formatting Marks

Nonprinting formatting marks often help you uncover formatting problems or oddities in documents. The formatting marks also include additional characters not mentioned in the list, such as page breaks, column breaks, and section breaks. Some are controlled by specific items shown in Figure 48-3, while others are controlled by Show all formatting marks, regardless of the individual settings. The Show all formatting marks check can be toggled by pressing Ctrl+Shift+8 or by clicking the Show/Hide tool in the Paragraph section of the Home ribbon, shown in Figure 48-5.

Note

The Super ToolTip (or Enhanced ScreenTip) indicates that the shortcut key for Show/Hide is Ctrl+*. In this book, however, it's shown as Ctrl+Shift+8. Otherwise, you might try Ctrl+* on the number pad and wonder why it doesn't work. ■

FIGURE 48-5

If you use Show/Hide a lot, either memorize the shortcut key or right-click Show/Hide and choose Add to Quick Access Toolbar.



Marks included, shown in Figure 48-3, are as follows:

- **Tab characters:** This includes tab characters inserted by the user as well as pseudo-tabs that are included when using Word's numbering and bullets tools.
- **Spaces** (regular and nonbreaking)**:** This also includes page breaks. Why? Who knows?
- **Paragraph marks:** This setting also includes the display of the newline character and cell markers inside tables.
- **Hidden text:** In addition to hidden text formatting (Ctrl+Shift+H), this also toggles the display of index, table of contents, and table of authorities entries, which are formatted as hidden text.
- **Optional hyphens:** Also called *discretionary hyphens*, these are used with Word's hyphenation feature, and are manually inserted by you.
- **Object anchors:** These indicate the paragraph to which graphics are attached or anchored.

When you place a check next to any of these, the indicated characters are displayed all the time, and Show/Hide will not toggle them. Note that column breaks and section breaks are toggled by Show all formatting marks, but are not associated with any of the individual settings. Hence, there is no way to display column and section breaks all the time, independent of Show/Hide.

Printing Options

Word provides a number of options that enable you to control what is printed. Additional options are located in the Advanced tab, under Print and When Printing This Document. Options in the Display tab are as follows:

- **Print drawings created in Word:** This controls whether Word prints a variety of graphical objects. When this option is turned off, Word will not print any graphic that is in the drawing layer. Only graphics that are In Line with Text can be printed and not all of those. When set to In Line with Text, pictures inserted from files, some clipart, and WordArt can

be printed even if this setting is turned off. With this setting turned off, even if set to In Line with Text, Word will not print SmartArt, shapes, textboxes, or charts. This setting also affects whether images used as watermarks are printed.

- **Print background colors and images:** This determines whether Word prints web-style background colors and images. This does not affect watermarks.
- **Print document properties:** When enabled, this causes an additional page to be printed at the end of the document (and not integrated into the page number structure). The additional page contains a number of document properties: filename, directory, template, title, subject, author, keywords, comments, creation date, change number, last saved on, last saved by, total editing time, last printed on, number of pages, number of words, and number of characters.
- **Print hidden text:** This determines whether hidden text (index/table of contents/table of authorities entries and text formatted as hidden by you) is printed.
- **Update fields before printing:** If enabled, all fields are updated when the document is printed, except for fields that are locked (using either the LockFields keystroke command, Ctrl+F11, or a locking switch).
- **Update linked data before printing:** If enabled, non-field-based links are updated when the file is printed. This includes data linked using XML methods.

Proofing

Proofing options control what kinds of things Word considers to be errors, and what it does about those errors. The Proofing tab has five sections:

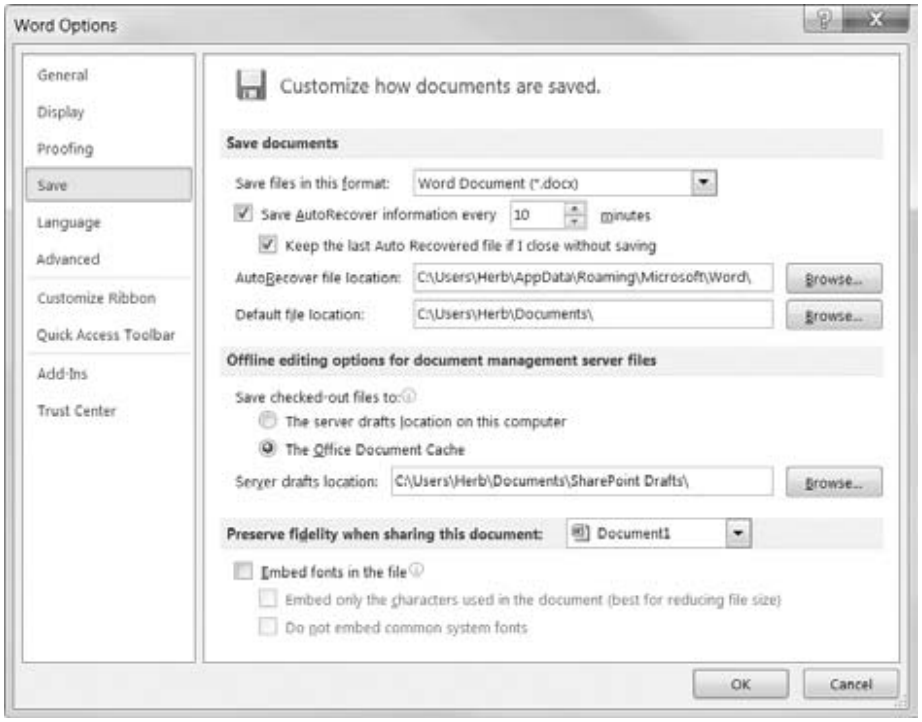
- **AutoCorrect Options:** See Chapter 14 for a complete discussion of AutoCorrect options.
- **When correcting spelling in Office Programs:** These are options that affect all Office 2010 programs that use the proofing tools. See Chapter 12 for a discussion of these options.
- **When correcting spelling and grammar in Word:** These are additional spelling and grammar options available in Word that can be set in addition to what might be set in other Office 2010 programs. For example, SharePoint Designer has a "Check spelling as you type" option that is independent of Word's. See Chapter 12 for more on these options.
- **Exceptions for a current document or all new documents:** Use these two to hide spelling and grammar errors in either a currently open document only or All New Documents. Use the drop-down to set the target to the desired document (or All New Documents). Making an exception can be especially useful when writing in a language for which you don't have proofing tools, or when using technical terms that Word has never heard of.

Save

The Save tab, shown in Figure 48-6, houses a number of settings relating to how Word saves your documents. Additional Save settings can also be found in the Advanced tab.

FIGURE 48-6

Careful use of Save options can save you time and effort.



Backup Options

The Save documents section shown near the top of Figure 48-6 provides five important settings:

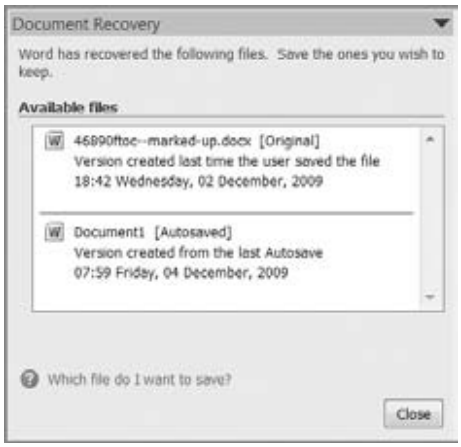
- **Save files in this format:** Use this setting to set Word's default save format. Ordinarily, to take full advantage of Word 2010's features, you'll want to save in `.docx` format. However, if you work in an office with mixed installations of different versions of Word and/or other word processors, it can be helpful to default to saving files in a different format. Or, sometimes you need to save in a specific different format when working on a particular project. In any case, you have 17 different default formats from which to choose (depending on what converters and previous versions of Word were installed on your computer, you might have a different number).
- **Save AutoRecover information every *x* minutes:** When this option is enabled, Word starts an internal timer every time a document is saved (by you or by Word itself). When *x* minutes pass since the last save, if there are unsaved changes (since the most recent save) Word saves a copy of the document with an `.asd` extension in the AutoRecovery location,

and includes a reference to the original file's name and location. Each time you explicitly save the file, the `.asd` file is removed and the time is reset. Note that Word will never automatically save the actual file itself — just the `.asd` version. When Word is closed normally, all `.asd` files are removed from this folder. If Word crashes, the `.asd` files aren't removed. The next time Word starts, Word checks whether there are any `.asd` files in the AutoRecovery folder. If there are, it presents them to you as shown in Figure 48-7.

- **Keep the last Auto Recovered file if I close without saving:** With this option enabled, Word preserves a copy of unsaved versions of files (documents closed without saving changes) in a drafts folder. These are available as versions in File ➪ Info ➪ Manage Versions. These files are saved in `C:\Users\[user]\AppData\Local\Microsoft\Office\DraftFiles`. You cannot change this location. Note that this is not the same Versions feature that existed in Word 2003 and earlier. That feature is gone. However, Windows 7's own Previous Versions feature does provide additional resources for recovering older saved versions of files (in Windows Explorer, right-click a file or folder and choose Properties ➪ Previous Versions; in Vista, the previous versions feature was available only in the high-end versions, including Ultimate, Business, and Enterprise).
- **AutoRecover file location:** Word defaults to a location in your personal documents and settings folder (this location can vary depending on what version of Windows you are using). Under some circumstances, you might want to specify a backup drive or a network drive for this location. Either way, it should be a location that is available when Word restarts.
- **Default file location:** This is the location where Word saves files and looks for files. You might want to change the location from the default for better organization and control over your files, and to use subfolders.

FIGURE 48-7

If there are any .asd files in the AutoRecovery folder, Word assumes that Word was not closed normally the last time it was open.



Offline Editing Options for Document Management Server Files

These options control what Word does when you check out files from a document management server, such as SharePoint, which is discussed further in Chapter 52. These settings can affect performance. Under most circumstances, the best performance will be obtained if Word makes a local copy of the file on your own computer. Under some circumstances, however, security requirements might be such that specific documents need to reside on the server. Note that if you choose to save the checked out file to a web server, you will still need to check that document back in for others to see your changes and/or to access it themselves for editing. The server drafts location can be on your own computer, some other location on your LAN or WAN, or an Internet location.

Preserve Fidelity When Sharing This Document

The last set of options default to affecting only the current document, but you can set it to any open document using the drop-down arrow. Or, if you want to change the defaults for all new documents, use the drop-down arrow to change to All New Documents. Use the Embed fonts in the file option if you're using unusual fonts, and/or the fonts are essential to proper display and interpretation of the document. This option can be crucial when the document is being printed by a commercial printing service. When you choose to embed, you have the following additional options:

- **Embed only the characters used in the document (best for reducing file size)**: Any given font set potentially can contain hundreds of characters. If the others need fonts only for displaying and printing a file, enable this option to keep file size low. If others will need fonts to edit the file, don't use this option.
- **Do not embed common system fonts:** This is another space-saving option. It prevents common Windows fonts, such as Arial and Times New Roman, from being embedded, thereby saving on file size.

Note

Not all fonts are licensed to permit embedding. Fonts that come with Office 2010 do permit embedding. If you paid a third party for fonts, check your license agreement. If your document contains such fonts, and if the document recipient (for example, a commercial printing service) doesn't have the correct fonts, you will need to provide the necessary fonts in some other way (for example, using removable media).

Some fonts are licensed only for preview. If you embed preview-only fonts, others will be able to view and print the file, but will not be able to make changes. ■

Language

Word-controlled language settings have expanded in Word 2010. You'll see a number of options that were not available in previous versions.

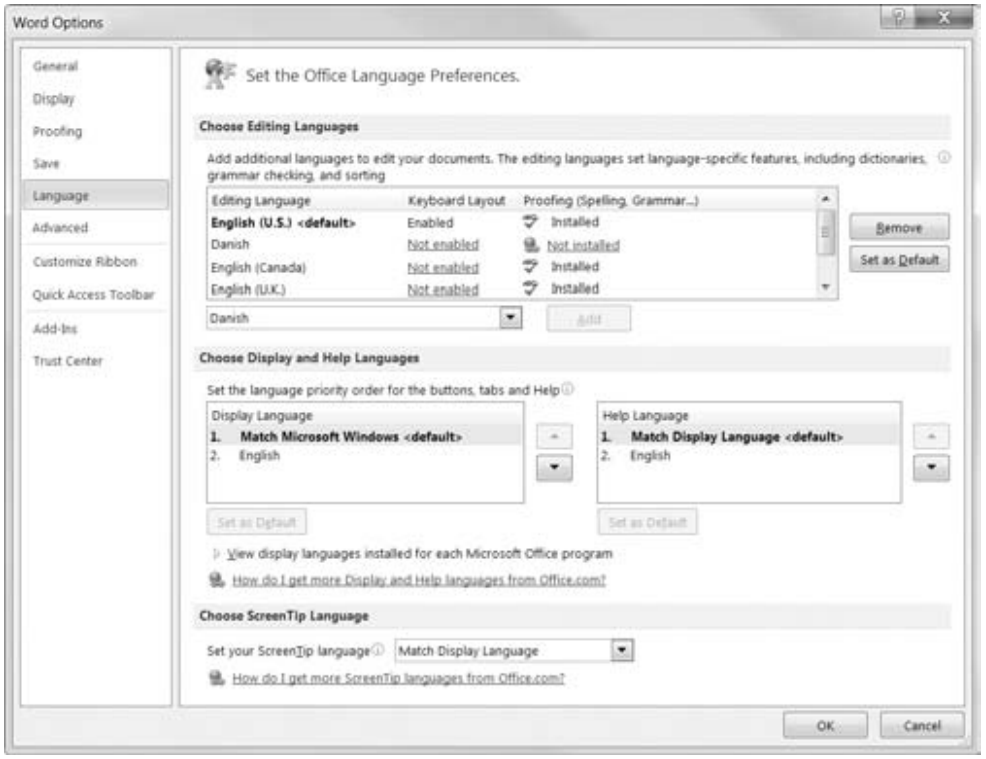
Choose Editing Languages

Use this setting to install and enable additional editing languages. This setting affects all Office 2010 applications — you do not, for example, need to install and enable Spanish separately for Excel, Word, PowerPoint, and so on.

As suggested by Figure 48-8, installation and enabling are not the same thing. To install a language, choose the language in the drop-down box at the bottom of the list of installed/enabled languages, then click Add. If you see Installed and Enabled, you're good to go.

FIGURE 48-8

Editing Language determines the proofing tools and other options that are available in Office 2010.



If you see Not Installed, click the link to see if the language is available for download or purchase.

If you see Not Enabled, click the link to begin the enabling process. You'll be greeted by the Text Services and Input Languages dialog box, shown in Figure 48-9.

FIGURE 48-9

Click Add to enable an installed language so that you can edit in that language.



FIGURE 48-10

Expand the target language so you can specify which keyboard(s) to install.



Click Add. In the Add Input Language dialog box, shown in Figure 48-10, expand the target language as shown. Many users aren't aware that not every country uses the same keyboard layout as the U.S. If you have a Spanish keyboard, you might benefit from enabling Spanish — if you don't, you might find it frustrating to use, because the key layout is not the same as on most U.S. keyboards — which you can see for yourself if you check a language and click Preview.

If you prefer to use "dead keys" for typing accented characters, a nice compromise often is US International. Click Show More to do precisely that. Click United States-International (if desired).

Note

"Dead keys" refers to accent keys that work only after you've pressed a second character. Using United States-International, for example, if you press the ' key, nothing appears. The keyboard is waiting to see if you want a single quote for its own sake, or if you want an accented letter. If you type 'f, then the ' and the f both appear at once when you press the f, because there is no accented f. If you press 'e, then é appears when you press the e. All of the standard accented characters from the Latin alphabet can be typed in this way, using the (Shift+6) for ô and û, for example. You can insert accented characters using the default United States keyboard as well, but you need to add the Ctrl key to the accent, for example, Ctrl+' followed by e to produce é. ■

Once you've added additional editing languages, a keyboard icon should appear in the Windows taskbar. Click it to choose the desired language.

Choose Display and Help Languages

This section lets you independently choose the language for the interface (button labels, menu, and so on) and Help. The default is for the interface to match Windows' language, and for Help to match the display language. If you need additional languages, click the "How do I get more Display and Help languages from Office.com?" link.

Choose ScreenTip Language

By default, this is set to match the current display language. Unlike Display and Help languages, this is not tied to complete language interfaces. If you installed Spanish and/or French proofing tools when you installed Office 2010, then ScreenTips for those languages will be available. If you need ScreenTips for a different language, then click the How do I . . . link to find out how.

Advanced

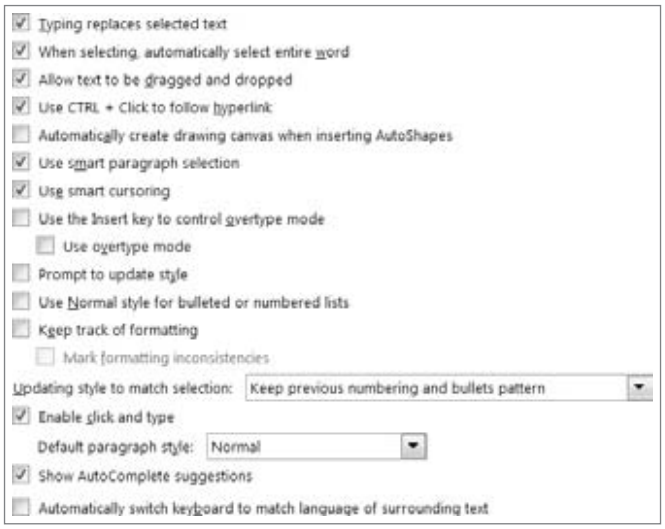
The Advanced tab contains more than 140 different options settings (if we include the Layout Options at the bottom of the tab). Though many of these are options you will never need, let alone care about what they are, each and every one of these settings is important to *somebody*.

Editing Options

Editing options are used to control a number of what to many Word users are essential features, but which to others are annoyances. They are shown in Figure 48-11.

FIGURE 48-11

Editing options can make your life easier.



The advanced editing options are as follows:

- **Typing replaces selected text:** This is Windows' default. Word supports a different option that Windows doesn't support. If this setting is turned on and text is selected, when you type another character, the selection is replaced by the first character you type (or by the contents of the Clipboard if you are pasting over a selection). If this option is turned off, text you type or paste is inserted to the left of the selection, and the selection highlight is removed.
- **When selecting, automatically select entire word:** For selection purposes, this affects only the mouse. When enabled, when you select from the interior of a word and drag to expand the selection to include additional material, the original selection start point is moved to encompass the entire word. This setting also affects formatting. When enabled and nothing is selected, if you apply character formatting anywhere in a word, the formatting is applied to the entire word (no matter how the formatting is applied, that is, pressing Ctrl+B, clicking a formatting tool, or using the Font dialog box).
- **Allow text to be dragged and dropped:** When this setting is turned off, when you click to try to drag selected text, the selection highlighting is removed instead.
- **Use Ctrl+Click to follow hyperlink:** When this setting is turned off, clicking follows a hyperlink, which can make selecting text rather difficult.
- **Automatically create drawing canvas when inserting AutoShapes:** This controls whether Word inserts the drawing canvas. Many users hate this feature, and removing the check lowers their blood pressure. See Chapter 6 for more about this option.
- **Use smart paragraph selection:** When enabled, if you select a paragraph, the paragraph mark is automatically included.

- **Use smart cursoring:** This controls what happens when you scroll using the scroll bars. When enabled and you scroll so that the insertion point is no longer showing, Word automatically moves the insertion point to the top of the page that is displayed. When turned off, the next character is inserted at the insertion point, which might be miles from where you are looking. Though this is annoying to some, to others it's actually useful. You can scroll to look for something in your document, and then press the Left and Right arrows to return to the insertion point to resume typing.
- **Use the Insert key to control overtype mode:** This is the Windows default. In Word, however, it's not. This setting evolved due to people accidentally pressing the Insert key and toggling Overtype on, which replaces old text — character for character — as new text is typed.
- **Use overtype mode:** Use this setting to toggle Overtype on/off. If the status bar displays Overtype status (right-click the status bar and choose Overtype), you can also toggle this by clicking Overtype or Insert in the status bar.
- **Prompt to update style:** This controls whether Word reapplies the current style or prompts to update the style, when the current style and the formatting of the selection are different. See Chapter 9 for a more complete discussion.
- **Use Normal style for bulleted or numbered lists:** When enabled, when you click the Numbering or Bullets tools, Word uses Normal to format the list. When disabled, Word instead uses List Paragraph style.
- **Keep track of formatting:** When enabled, variant formatting information is added to the Plus section in the Style Inspector. See Chapter 9 for more about the Style Inspector.
- **Mark formatting inconsistencies:** When enabled, Word analyzes your formatting and underlines text it considers to be inconsistent using a blue zigzag. This analysis is not instantaneous, and sometimes can take several minutes before it appears.
- **Updating style to match selection:** Lets you choose between Keep previous numbering and bullets pattern" or "Add numbering or bullets to all paragraphs with this style". If you have a series of paragraphs — some numbered/bulleted and some not — but all using the same style, "Keep previous . . . " will allow the formatting pattern to remain if the style definition is updated. If "Add numbering or bullets . . . " is enabled, then if you update the style definition, the previously unnumbered and unbulleted paragraphs will acquire bullets or numbers. If you typically apply bullets and numbering by using the tools in the Home ribbon's Paragraph section (rather than by explicitly applying dedicated styles), then changing to "Add numbering . . . " will likely have a major impact on your formatting, and will cause unintended numbering/bullets in your document. If you typically use dedicated bullet or numbering styles, then the "Add numbering . . . " feature will help you maintain the strict use of styles.
- **Enable click and type:** When enabled, you can double-click anywhere and start typing. Word will add the necessary tabs and paragraph marks to allow you to start typing where you double-click.
- **Default paragraph style:** Use this to set the default style that is applied when you use Click and Type.

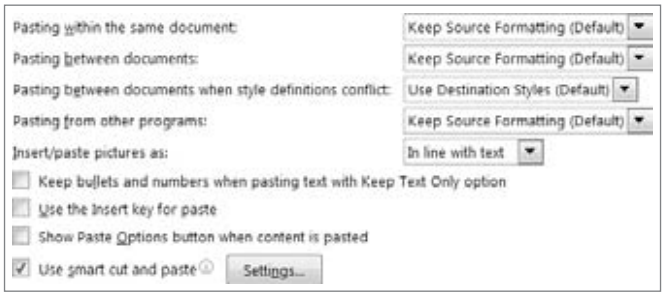
- **Show AutoComplete suggestions:** This controls whether Word provides an AutoComplete suggestion when it recognizes a date or an AutoText entry. Note, as indicated in the Caution in the "Display" section later in this chapter, if the horizontal scroll bar is visible (that is, if text is zoomed so large or the window is made so narrow that the horizontal scroll bar is needed), then AutoComplete suggestions will not appear.
- **Automatically switch keyboard to match language of surrounding text:** If you have multiple keyboard definitions installed (for example, Spanish, French, and so on), this setting appears under Editing options. Enabled, it automatically switches the keyboard to the corresponding language. This is different from language setting, which changes only which proofing tools are used.

Cut, Copy, and Paste

Cut, copy, and paste settings, shown in Figure 48-12, are used primarily to control what happens when pasting.

FIGURE 48-12

Cut, copy, and paste settings can save you work if they stop Word from automatically doing something you always have to fix.



The first four options control the following pasting behaviors:

- Pasting within the same document
- Pasting between documents
- Pasting between documents when style definitions conflict
- Pasting from other programs

Word offers the same three options for each of those four, and a fourth when style definitions conflict:

- **Keep Source Formatting:** Use this option when pasting things such as book and article titles.
- **Merge Formatting:** The style name(s) in the original text are kept, but the destination style definitions are used. Use this option when repurposing text, such that the original formatting is moot.

- **Keep Text Only:** This is the equivalent of choosing Paste Special ➪ Unformatted Text. It removes all formatting and graphics.
- **Use Destination Styles:** This option is provided only when pasting between documents and style definitions are in conflict.

Additional cut, copy, and paste options are as follows:

- **Insert/paste pictures as:** Use this to set the default wrapping style for pictures and many other (but not all) graphic objects.
- **Keep bullets and numbers when pasting text with Keep Text Only option:** Ordinarily, when pasting formatted text that contains bullets and formatting (where that formatting is applied using HTML or RTF techniques, rather than actual numbers of bullet characters), when formatting is suppressed, so are the bullets and numbering. This setting is supposed to preserve that formatting. Unfortunately, it doesn't always work, especially when pasting from an Internet browser.
- **Use the Insert key for paste:** Antique versions of Word for DOS used the Insert key for pasting the contents of the Clipboard. Some users were loath to give that up, and Microsoft accommodated with this option.
- **Show Paste Options button when content is pasted (Fig. 48-12):** After you paste, a little Clipboard icon appears. If you hover the mouse pointer over it, a drop-down arrow appears, as shown in Figure 48-13. Hover over the icons to see what they do — if you can tell from the icons, more power to you. Sometimes, these buttons can get in the way of editing — especially if you never use them. Turn this option off if that's the case for you. (I did, and I've been happy ever since.)
- **Use smart cut and paste:** See the discussion in Chapter 6.

FIGURE 48-13

If the Paste Options buttons shown here get in your way, you can ice them by removing the check next to the Show Paste Options button when content is pasted (shown in Figure 48-12).

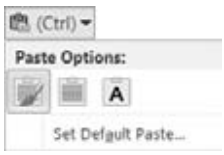


Image Size and Quality

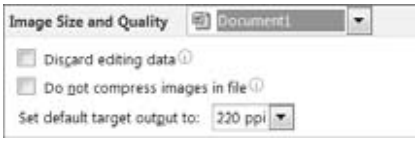
The settings shown in Figure 48-14 can be used to set options just for the current document or for all new documents.

- **Discard editing data:** Choose this option to tell Word not to save editing information when you crop/resize/recolor or otherwise edit images. Choosing this option reduces file size, but it also means that you can't later revert or undo edits without going back to the original image file.

- **Do not compress images in file:** Choose this option to keep full resolution data from images. This option increases file size, but it maximizes the available resolution. This can improve image quality especially when printing.
- **Set default target output to:** Choose this option when you need to precisely control the resolution of images. Choices are 220, 150, and 96 ppi. If your files are going to be viewed onscreen only, there's really no need for resolution above 96 ppi. On the other hand, if the documents are going to be printed, 220 ppi will provide higher quality with less graininess.

FIGURE 48-14

Set image size and quality options for the current document or for all new documents.



Show Document Content

Shown in Figure 48-15, the Show document content features affect how a variety of Word features are represented onscreen. Some of the following options are for information purposes only, such as text boundaries and crop marks, while others can affect performance when memory and other resources are tight.

FIGURE 48-15

When pictures disappear and odd things show up in your documents, document content settings often explain why.

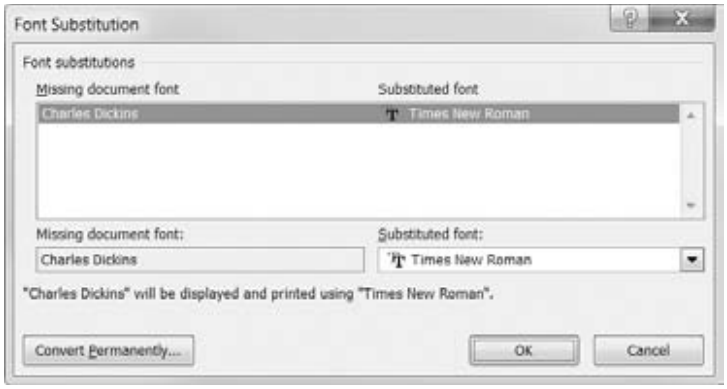


- **Show background colors and images in Print Layout view:** Choose this option to display background colors and images in the document. This affects the display of Page Color settings in the Page Layout ribbon, but does not affect the Watermark settings. This setting is independent of the similar Print setting in the Display tab.

- **Show text wrapped within the document window:** Choose this option to wrap text to the document window, so that horizontal scrolling isn't needed. This setting works only in Draft view (formally called Normal view).
- **Show picture placeholders:** Choose this option to display empty boxes instead of pictures in your document. This option does not affect the printing of pictures — just whether they are displayed in Word. Using this option makes displaying documents containing pictures faster, and requires less memory. This option does not affect the display of Word shapes, drawings, and textboxes. If multiple documents are open, this setting affects only the currently displayed document and documents opened thereafter.
- **Show drawings and textboxes on screen:** This option controls whether Word displays objects created using Word drawing tools when in Print Layout or Web Layout view. This option does not affect the printing of drawings and textboxes.
- **Show text animation:** Use this option to display animated text. Note that text animation is a legacy font formatting attribute that is not available in Word 2010, but it can still be displayed in documents created by earlier versions.
- **Show bookmarks:** This option displays bookmarks by placing brackets around bookmarked text. The brackets display as [bookmark] when text is bookmarked, or as an I-beam when a single point is bookmarked. This is for screen display purposes only, and does not affect how the document is printed.
- **Show text boundaries:** This option displays hash lines around text margins, columns, and paragraphs. This feature is useful for document layout purposes. The hash lines are not printed, and disappear when the document is displayed in Print Preview.
- **Show crop marks:** This option causes Word to display crop marks at the corners of your document. They are used for layout purposes, like text boundaries, and are not printed.
- **Show field codes instead of their values:** Use this option to display field codes instead of field results. You can toggle this setting on/off by pressing Alt+F9.
- **Field shading:** Use this option to control when and if fields are displayed as shaded. Choose Always or When Selected to shade your fields. Using some kind of shading is a good idea because it makes fields easy to see and can help prevent accidental editing and deletion.
- **Use draft font in Draft and Outline views:** Use this option if you don't want to see font variations onscreen. This can be handy if the chosen fonts and point size make the document hard to read or are distracting. Because the display is less complicated, this option also uses fewer system resources.
- **Name and Size:** Choose the font and size used to display Draft view. Even if you don't want Draft view right now, you can enable Draft view, choose your draft font/size, and then remove the check next to Use draft font. Word will remember your settings.
- **Font Substitution:** Use this button to open the Font Substitution dialog box, shown in Figure 48-16. If no fonts in the current document are missing, a message box informs you of that fact. This option is also a useful way to discover whether the current document contains formatting using fonts not present on your computer. Choose Convert Permanently if there is no reason to maintain the different font and little chance of obtaining it.

FIGURE 48-16

Use Font Substitution to tell Word how to display text formatted using fonts not available on your system.

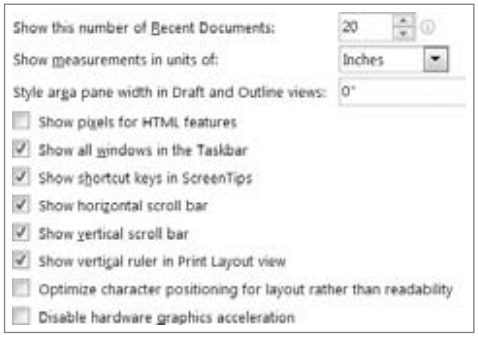


Display

Whereas the Show document content settings mostly affect the interior parts of a document, the Display settings, shown in Figure 48-17, affect the working environment.

FIGURE 48-17

If the Display tab doesn't contain the setting you seek, try the Advanced tab's Display section.



Word's Advanced Display options are as follows:

- **Show this number of Recent Documents:** When you click the Office button, Word displays a list of recent documents. Use this setting to tell Word how many documents to remember. The number can vary from 0 to 50. This list is now scrollable — unlike in Word 2007 — so it might make sense to enter the max, particularly if you have an intricate folder structure that's tedious to navigate, and you work with lots of files. On the other hand, as a security/privacy matter, some users limit or eliminate this list.

Tip

New feature alert! The Recent Document list in Word 2010 lets you selectively remove files from the list. Just right-click the document you want gone, and choose Remove from list! ■

- **Show measurements in units of:** Use this setting to choose the measurement units that are used for the rulers dialog boxes. This does not affect font point size selection. Measurement options are inches, centimeters, millimeters, points, and picas.
- **Style area pane width in Draft and Outline views:** Setting a non-zero value causes Word to display a pane at the left side of the Word document, showing the names of the applied styles. Once visible, the pane's width can be varied by dragging its right boundary. Drag all the way to the left to close it. Once closed, it can't be reopened by dragging, and must be reopened using the Advanced Display settings.
- **Show pixels for HTML features:** Use this option to set pixels as the default unit of measurement for HTML features in dialog boxes. This setting affects a variety of dialog boxes even for features you might not associate with HTML, such as paragraph spacing, table dimensions, and so on. This setting is not related to the document view.
- **Show all windows in the Taskbar:** Using this option creates a separate icon on the Windows taskbar for each open document. This makes it appear as if multiple instances of Word are open when only one instance is open. The operation of this feature is dependent upon the taskbar buttons: setting in Windows 7. If you have Always Combine enabled, the Word setting is moot. If you have Never Combine enabled, Word's setting takes precedence. To access these settings, right click Windows 7's taskbar, choose Properties, and in the Taskbar tab, note the "Taskbar button:" setting in the middle of the dialog box.
- **Show shortcut keys in ScreenTips:** Use this option to display shortcut keys in ScreenTips. Compare this option with ScreenTip Scheme in the General tab. It provides an additional display option when ScreenTips are displayed, but has no effect when ScreenTip Theme is set to Don't Show ScreenTips.
- **Show horizontal scroll bar:** Use this option to display the horizontal scroll bar at the bottom of the document window. In Print Layout view, the scroll bar displays only when the document is wider than what can be displayed at the current zoom.

Caution

It's a good idea to leave horizontal scroll bar enabled — it's a useful diagnostic. If the horizontal scroll bar is visible, AutoComplete will not work. If this setting is turned off and you don't see the horizontal scroll bar, then you won't know if AutoComplete failure is due to this problem or due to registry corruption (which also happens). ■

- **Show vertical scroll bar:** Use this option to display the vertical scroll bar at the right side of the document window. When enabled, the vertical scroll bar displays all the time, regardless of the zoom.
- **Show vertical ruler in Print Layout view:** This option controls whether the Ruler setting (in the View ribbon) toggles the vertical ruler as well as the horizontal ruler. You can also toggle the rulers by clicking the ruler icon at the top of the vertical scroll bar. You can display just the horizontal or vertical ruler by moving the mouse pointer over the top or left edge of the document window, respectively.

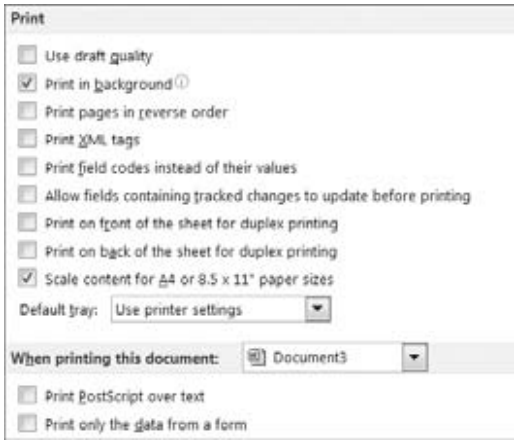
- **Optimize character positioning for layout rather than readability:** Use this option for exact character positioning when creating high-end brochures and other publications for which correct kerning is needed. For best onscreen reading, turn this option off, because it can result in the crowding of narrower letters such as the lowercase i.
- **Disable hardware graphics accelerations:** For some video adapters, hardware acceleration prevents Word from displaying some graphics or other features correctly. If you notice display problems, try using this option to suppress hardware graphics acceleration to see if it eliminates the problem. If it does, see if you can update your video driver, and then retry with acceleration to see if the update eliminates the problem.

Print

Print options, shown in Figure 48-18, are used to set a number of printing defaults, in addition to the settings in the Word Options ➪ Display tab.

FIGURE 48-18

Print settings control a variety of printing defaults; use ''When printing this document'' to control only the active document.



Advanced Print options include the following:

- **Use draft quality:** This option instructs Word to print the document using the printer's draft mode (assuming it has one). This can save ink/toner and time, when all you need is a paper copy to review the text. Some printers do not support draft printing.
- **Print in background:** This option allows printing at the same time you continue working. Don't confuse this "background" with the "print background colors and pictures" option discussed earlier. If you have a slow computer, this option can make working even slower. Usually, however, this setting is moot because the document is quickly handed off to Windows.

- **Print pages in reverse order:** Use this option if your printer stacks the document face up, first sheet on the bottom. Select this option also if you need to have sheets reversed for some reason.
- **Print XML tags:** Use this option to print XML tags for XML elements applied to an XML document. For this to work, a schema must be attached to the document.
- **Print field codes instead of their values:** This option causes Word to print field codes instead of field results. This can be useful when you are checking the logic and links in a document, rather than the content.
- **Allow fields containing tracked changes to update before printing:** A new option in Word 2010, this option ensures that the "latest" version of a link/field is used when printing. Turn this option off to ensure that what you're looking at is what will print. If you're unsure about what will print, Print Preview (in the right panel when you choose File ➪ Print) or saving in XPS or PDF format are good ways to be sure about printed results before committing to paper.
- **Print on front of the sheet for duplex printing:** Use this setting to simulate duplex printing by printing to the front of each sheet when printing on a printer that does not have duplex capability. Pages are printed in reverse order so that when you turn them over, the backs are ready to print in the correct order.
- **Print on back of the sheet for duplex printing:** This is the flip side of the immediately preceding option. Select this option to finish the simulated duplex printing operation.
- **Scale content for A4 or 8.5 × 11" paper sizes:** Use this option to automatically adjust the size of the output for European or U.S. standard paper sizes.
- **Default tray:** Use this option to tell Word which printer tray or slot to use by default.

When Printing from This Document (or All New Documents)

These options can be applied to a specific open document or to All New Documents. Use the drop-down arrow to set the target as desired. The options are as follows:

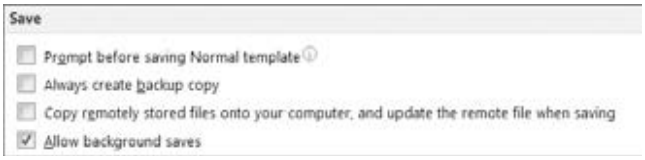
- **Print PostScript over text:** When a Word document has PRINT fields that contain PostScript codes, this option tells Word to print the text first, and to then overlay the results of the PostScript command on top of the already printed text. PRINT fields aren't used very often, and show up mostly in documents converted from Word for the Mac.
- **Print only the data from a form:** Use this option to print only the data in a form, without printing the protected text. This option works only with legacy Word fields, and not with Word 2007/2010 content controls.

Save

Word's Advanced Save options, shown in Figure 48-19, set four options in addition to those found in the Save tab. These can affect certain features and performance, as well as interact with other Word features, so you should consider the consequences before using them.

FIGURE 48-19

Advanced Save options change the defaults for all Word documents.



The Save options in the Advanced tab are as follows:

- **Prompt before saving Normal template:** With this option enabled, when you close Word, if `Normal.dotm` has changed, you are prompted to save changes to `Normal.dotm`, as shown in Figure 48-20. You will also see this prompt when you choose Save All, if `Normal.dotm` contains unsaved changes (see the note about Save All following the description of the Save options). As a security measure, this is a recommended option. Not only does it enable you to say No if you were experimenting with settings and don't really want to save the changes, but it also alerts you if something else has unexpectedly changed `Normal.dotm`.

FIGURE 48-20

When ''Prompt before saving Normal template'' is enabled, you might see this dialog box when closing Word.



- **Always create backup copy:** This option causes Word to create a backup copy of every document you change — including templates. Each time you save changes to a document, Word replaces any existing backup copy, by copying the most recently previously saved version of the file to a file named Backup of *current name*.wbk. This file is saved to the same folder as the original. A problem with this feature, however, is that it also saves a backup copy of `Building Blocks.dotx`. The next time you start Word, the backup copy is loaded in addition to `Building Blocks.dotx`, giving you duplicate entries in the Building Blocks Gallery and Quick Parts Gallery. Another problem is that this feature creates a backup copy every time you save, so if you follow best practices and save frequently, the backup copy won't be the version of the file as it was when you first opened it. It will always be what the file looked like just a few minutes earlier. If corruption occurs, you likely won't find out until long after the current document and the backup copy are both corrupted.

- **Copy remotely stored files onto your computer, and update the remote file when saving:** This option tells Word to temporarily store a local copy (that is, on your own hard drive) of files that are retrieved from/stored on a network or removable drive. When you save the local copy, changes are saved to the remote file as well. If the original file isn't available, you are prompted to save to a different location to avoid losing the changes. When the file is closed, the temporary version is removed. This option improves performance. The difference between this option and the Offline editing options for document management server files detailed in the Save tab discussion is that the Advanced Save option affects files that aren't on a document management server.
- **Allow background saves:** This option instructs Word to save documents in the background while you work on them. This enables you to continue working, but can cause slower saving times. If connectivity to the save location is an issue, or if there is a chance of power loss, using this option increases the chances of document corruption and data loss.

Note

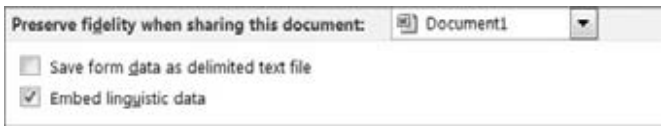
In Word 2003 and earlier, you can display the Save All command in the File menu by holding the Shift key when you click File. This does not work in Word 2010. Instead, if you're a fan of Save All, you can add it to the Quick Access Toolbar or the ribbon. You'll find it in Commands, not in the ribbon. See Chapters 46 and 47 for more information about customizing the QAT and ribbon. ■

Preserve Fidelity When Sharing This Document

The Preserve fidelity . . . options, shown in Figure 48-21, can be applied to any open document or to all new documents. Use the drop-down arrow to change the target as needed

FIGURE 48-21

''Fidelity'' doesn't quite seem to fit the options contained in this feature set.



Fidelity seems like a curious name to use for the options contained in this group of settings. That notwithstanding, the options here are as follows:

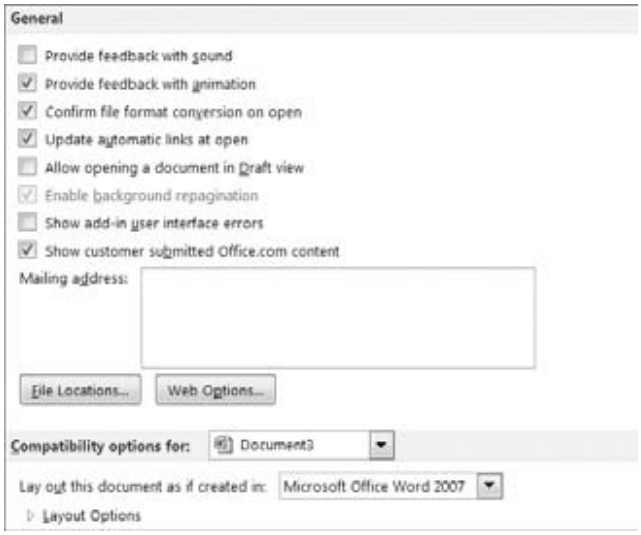
- **Save form data as delimited text file:** Use this option to save only the data when saving a forms-protected document that contains legacy form fields. Note that this feature affects only legacy form fields, and does not work on content controls.
- **Embed linguistic data:** Use this option to save linguistic data, such as speech and handwritten text, in the file.

General

The General options in the Advanced tab, shown in Figure 48-22, defy categorization. At least, they don't fit the taxonomy otherwise offered. They do, however, provide access to a great tool that expands what you can do with Word, "Confirm file format conversion on open." For more on this setting, see the bulleted descriptions.

FIGURE 48-22

The General settings in the Advanced tab provide access to some useful features.



General options in the Advanced tab are as follows:

- **Provide feedback with sound:** Use this option to play cheesy sound effects when performing a number of different actions, such as when deleting, pasting, and so on. In order to work, you need the Microsoft Office Sounds add-in. A dialog box will inform you of that fact, and offer to initiate a site visit so you can download it. Click Yes to do it, or No to change your mind. If you say Yes, download and run the file (`sounds.exe`) to install the add-in, following the directions/prompts in the wizard.
- **Provide feedback with animation:** Use this option to animate your pointer in Word and other Office programs that support animation. (It's not clear that this feature actually does anything. I've never seen it make any difference whatsoever.)
- **Confirm file format conversion on open:** Use this option to be able to select the converter to use when opening a file that's not a native Word file. This can be handy when you want to deal with XML, HTML, or even RTF files directly, rather than with Word's interpretation of them. If unchecked, Word automatically determines which converter to use. If

you have this feature unchecked but get the Convert File dialog box anyway, either the file isn't in a format recognized by Word or it is corrupted.

- **Update automatic links at open:** Use this option to update all linked content when a file is opened. This affects field-based links, OLE links, and XML-based links.
- **Allow opening a document in Draft view:** Use this option to enable opening documents in Draft view. This works only if the document was last saved while in Draft view.
- **Enable background repagination:** Using this option tells Word to repaginate documents as you work. If you don't really care about pagination as you're working, deselecting this option can improve responsiveness and performance in Word. This option is available only in Draft and Outline views; otherwise, it is grayed out. In Print Layout or Print Preview, background pagination is automatic, not optional.
- **Show add-in user interface errors:** Use this option to display error messages from add-in programs that affect Word's interface.
- **Show customer submitted Office.com content:** This affects what you see in viewing online templates and other content. Remove the check if you want to see only content designed by Microsoft.
- **Mailing address:** Type your default return address for envelopes and letters when using associated Word features.
- **File Locations:** Use this button to examine and change the default folders for documents, Clip Art, User templates, Workgroup templates, AutoRecover files, Tools, and Startup files. To examine or change a location, click Modify. To change to a new location, navigate to it and select it, and then click OK. To obtain the location without changing it, right-click any item in the displayed folder and choose Properties. Click in the Location item, select it, and copy it to the Clipboard. Then press Esc to close the dialog boxes. You can now use that location elsewhere, as needed.
- **Web Options:** Click this button to open the Web Options dialog box, where you can set a variety of options to control how Word creates web pages.

Compatibility/Layout Options

Use the Compatibility settings to set a number of legacy and other options that make specific Word features behave either as they did in older versions of Word or in several older versions of WordPerfect. Use the Compatibility Options For field to apply the settings you choose to any open document or to all new files you create in Word.

You can choose preset combinations of options by setting "Lay out this document as if created in" to any of over a dozen different programs, as shown in Figure 48-23. When you choose a program, the checked options change to reflect the selected version of Word or WordPerfect. Alternatively, you can mix and match options as needed, selecting just those options you want — the " . . . as if" setting automatically changes to Custom. More often than not, this is a process of trial and error. Note that the default setting is Word 2010.

FIGURE 48-23

You can tell Word to treat an open document (or all new documents) as if they were created using any of over a dozen different versions of Word and WordPerfect.



Customize Ribbon

The Customize Ribbon tab provides access to customization options for the ribbon and keyboard. See Chapters 47 and 45, respectively, for the glorious details.

Quick Access Toolbar

Use this tab to customize the Quick Access Toolbar. See Chapter 46 for details.

Add-Ins

Use the Add-Ins tab to view and control various Word add-ins. For most users, most or all of the add-ins listed won't really seem like add-ins to you. That's because they come with Office 2010. Most of us consider something an add-in if we explicitly and separately install it. None of the add-ins shown in Figure 48-24 were explicitly added by the user.

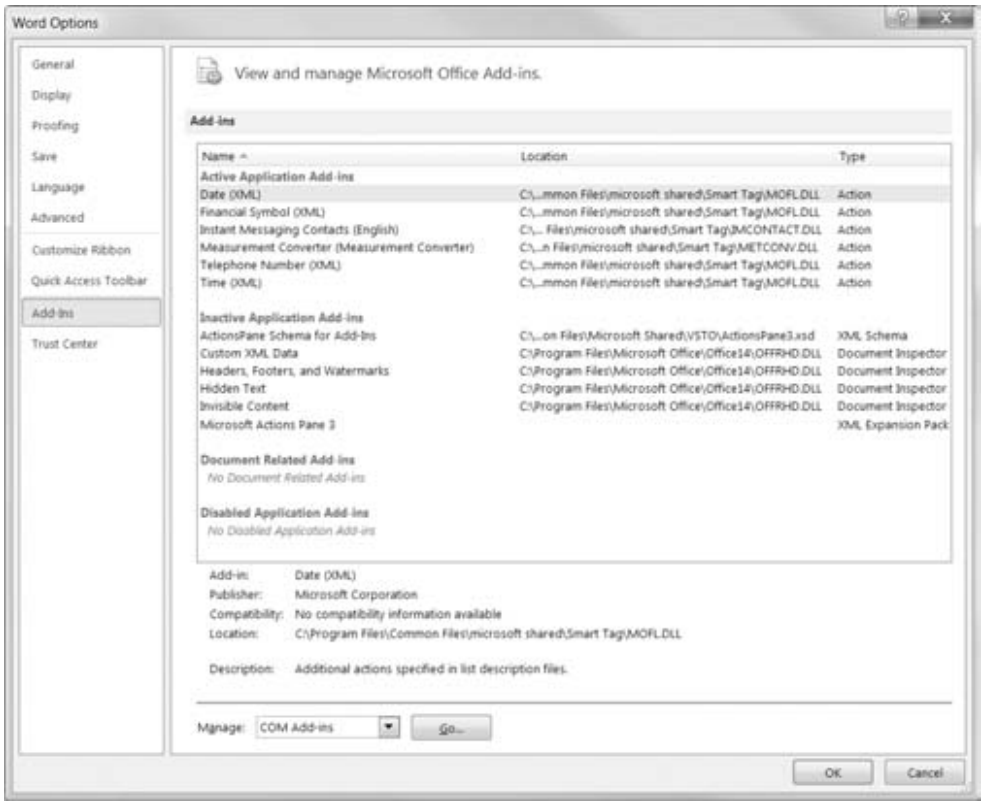
Add-ins are grouped into the following four sections:

- **Active Application Add-ins:** Add-ins currently in use that affect all of Word.
- **Inactive Application Add-ins:** Word-wide add-ins that are available but currently not being used.

- **Document Related Add-ins:** Available document-specific add-ins in use in the current/active document.
- **Disabled Applications Add-ins:** Add-ins disabled by you or by Word. If an add-in causes Word to crash or hang, it can automatically be disabled by Word.

FIGURE 48-24

Add-Ins are grouped into four sets.



Use the Manage tools to load, unload, disable, and enable add-ins. Manage tasks are grouped as shown in Figure 48-25: COM Add-ins, Actions, Word Add-ins, Templates, XML Schemas, XML Expansion Packs, and Disabled Items.

Note

***Component Object Model* (*COM*) is Microsoft's platform for adding software components to Windows. It encompasses OLE, OLE Automation, ActiveX, COM+, and DCOM (distributed component object model).** ■

FIGURE 48-25

Use Disabled Items to re-enable an add-in after you have updated.



Under ordinary circumstances, you should not have to be concerned with the Add-ins tab. However, if Word crashes due to an add-in, once any problems have been addressed (such as by updating the add-in), you can return to Add-ins to re-enable the disabled item. Under Manage, choose Disabled Items, and then click Go. In the Disabled Items dialog box, click the disabled item, and then click Enable ➪ Close.

Trust Center

Trust Center contains information as well as a variety of settings relating to document privacy and security. Under most circumstances, you will not need to change these settings. However, it can be useful to know what's under the hood, so to speak, so that you understand that these settings can be tweaked if necessary.

Note

The Trust Center options affect all of Office 2010, not just Word. ■

If you work in an enterprise environment, note that what you see in the Trust Center Settings might be different from what's shown here. Even if it is not different, there might be organizational policies that dictate what you can and cannot change. Consult your IT department if you are unsure. Note that changing settings can affect how Word works, as well as whether or not some features work at all.

Tip

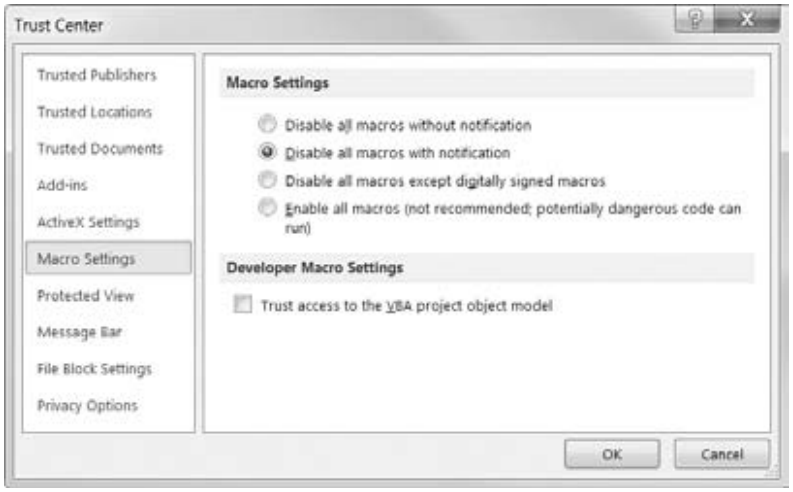
Before you make any changes, it's a good idea to note the defaults so that you can restore your settings if changing them breaks something. You can do this by "walking" through the settings and taking notes, or you can take screen shots (using Word's Screenshot tool in the Insert ribbon, for example) and save them into a Word document. ■

In the Trust Center tab, note that most of what you see are links to additional information about privacy and security. Examine these if you like — all of the blue links will open your default browser.

To access Trust Center settings, click the Trust Center Settings button. This displays the Trust Center dialog box. By default, the Trust Center dialog box displays Macro Settings, as shown in Figure 48-26, which is the most common set of trust settings that sometimes require user intervention.

FIGURE 48-26

Trust Center settings are organized into ten tabs.



Note

If a setting change doesn't seem to "take," you might need to close and restart either Word or all Office applications before they take effect. ■

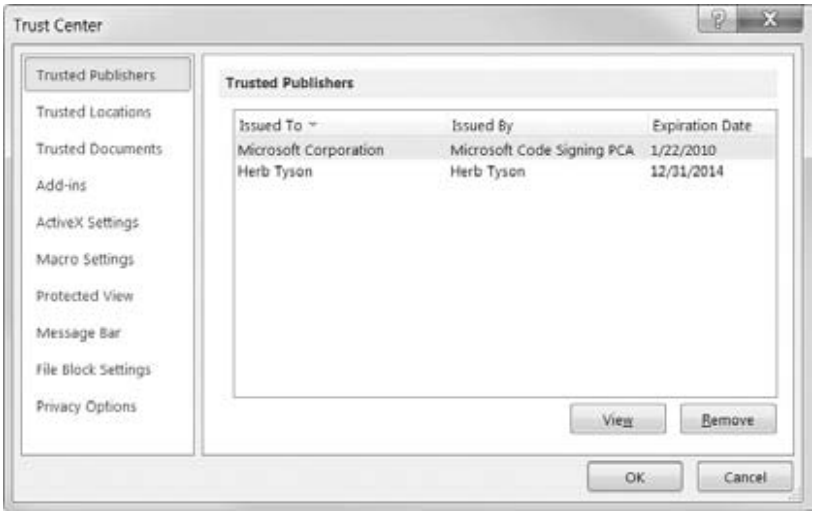
Trusted Publishers

Trusted publishers are developers who have created macros, add-ins, application extensions, or other custom facilities that you can use. When you install such items, their publishers may be added to the Trusted Publishers list as part of the installation process. For most users, however, most of the time your Trusted Publishers list will be empty or have only one entry in it, as shown in Figure 48-27. Here, only Microsoft and I am listed, having chosen to trust Microsoft and having installed and exercised the Digital Certificate for VBA Projects applet (formerly called Self-Cert). If you install third-party add-ins from Office.com, others might be listed as well.

If not added during installation of an add-in, Trusted Publishers can be added if you are prompted by a security notice such as the one shown in Figure 48-28. You can trigger this dialog box yourself if you see the yellow Security Warning appear at the top of a document. Click the "Click for more details" link, and then choose the Enable Content drop-down arrow ➪ Advanced Options.

FIGURE 48-27

Most users will have few if any Trusted Publishers listed.



Note that there are three relevant options:

- **Help protect me from unknown content (recommended):** This option rejects the publisher, and content will not be run.
- **Enable this add-in for this session only:** This option allows you to run the current content, but does not add the publisher as a trusted publisher.
- **Enable all code published by this publisher:** This option adds the publisher to your list of trusted publishers.

Caution

A *digital signature* is an encrypted allegedly secure stamp of authentication on a macro or document. By convention, only specific organizations can issue digital signatures. The digital signature is supposed to confirm that the macro or document originated from the signer and has not been altered. What's to stop someone with a valid digital signature from digitally signing malicious code? I don't know. Bottom line: Before you accept any digital signature, use some independent means to verify that the macros/add-ins you are effectively authorizing are really safe. ■

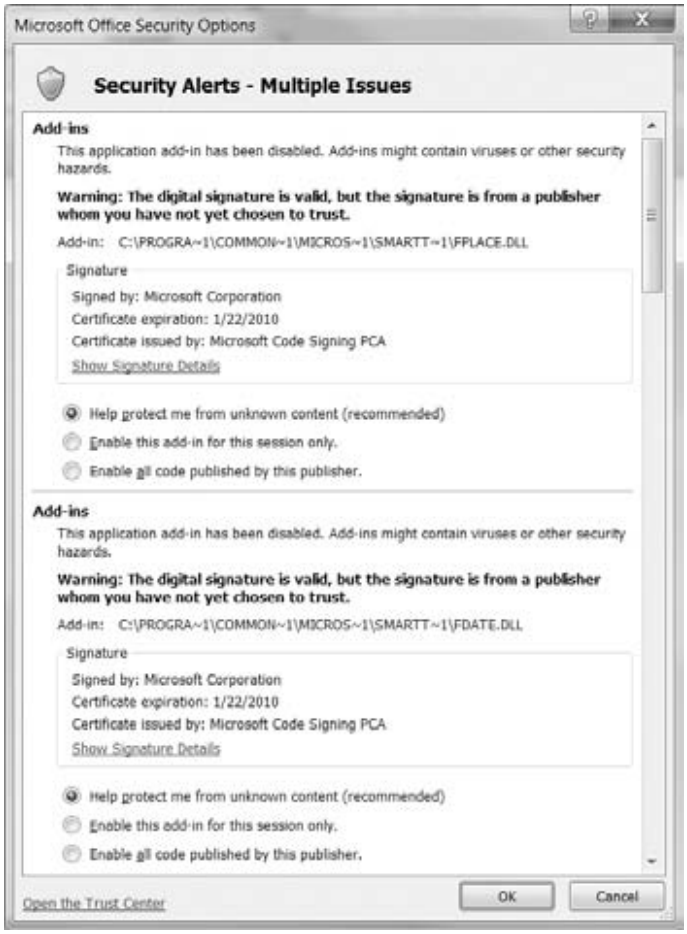
Trusted Locations

Trusted Locations provide another way of handling the security of macros you know to be safe. The Trust Center is paranoid by design. It trusts practically nobody — not even you. The Trust Center's default behavior is to trust only digitally signed macros personally verified by Moses.

Well, maybe not. But, close. If there are macros that you trust, but which the Trust Center doesn't, rather than lowering your security setting thereby putting your files at risk, it's better to put the template that contains those macros into a trusted location.

FIGURE 48-28

You will see this dialog box when there are multiple possible security issues.



Caution

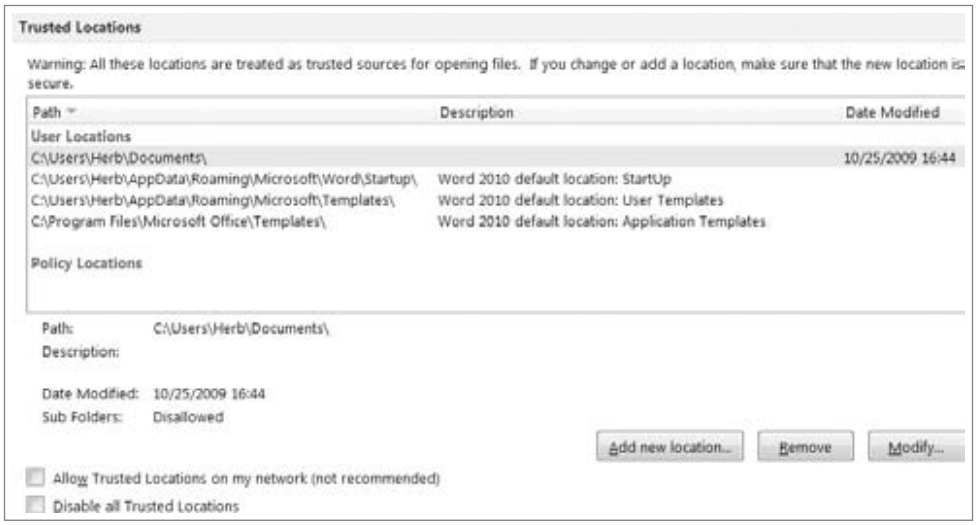
Many users don't know about Trusted Locations, and often wonder why a macro works, even though security settings are set relatively high. The reason is because the macros are in a template that is stored in a trusted location. Therefore, think twice before you put an add-in into a trusted location. The foot you shoot may be your own. ■

Think of Trusted Locations as a secure area. Once inside that area, armed guards no longer check ID or shine a flashlight at security certificates. Instead, they assume that those macros wouldn't be inside the compound unless somebody high up (you) had vouched for them. Put another way, it's *your* foot. If you trust yourself not to shoot yourself there, who is the Trust Center to argue?

The Trusted Locations tab, shown in Figure 48-29, enables you to add, remove, and modify locations. That way, if you don't want to co-mingle templates from different sources, you don't have to. By default, Word creates three trusted locations: User templates (templates that are on your computer because you put them there), Application templates (templates that are there because Office's setup program put them there), and StartUp templates (templates and other add-ins that are there because you or someone you trust — an add-in you installed, for example — put them there). In an enterprise, your IT folks might also have created one or more trusted locations using Windows' policy settings. If so, Policy Locations won't be vacant as it is in Figure 48-29.

FIGURE 48-29

Trusted Locations essentially override other macro security settings, so make sure macros are safe before putting a template into a trusted location.

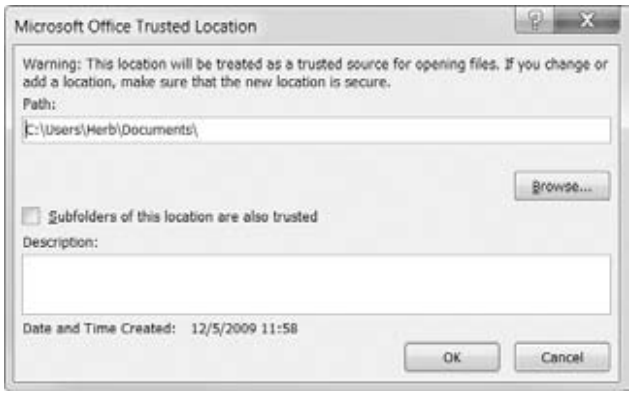


To add a new location, click Add new location. In the Microsoft Office Trusted Location dialog box, shown in Figure 48-30, use the Browse button as needed to locate and select the folder to add. Note that you can add only locations in this way, and not specific files. Click OK when you find the location you want to add. In the Microsoft Office (Fig.48-30 on next page) Trusted Location dialog box, note the option "Subfolders of this location are also trusted." Click this option only if you really trust any and all subfolders, and then click OK.

To remove a trusted location, under Path, click the location you want to zap, and click Remove (sadly, there is no Zap button).

FIGURE 48-30

Make sure a folder's subfolders contain only safe add-ins and templates before checking the ''Subfolders of this location are also trusted'' option.



To modify a location, click the location you want to modify and click Modify. You can use Modify not only to change a location, but also to turn on/off the option to include subfolders as trusted locations.

Tip

To save time and effort, rather than remove a location and add a new one, it's sometimes faster to use the Modify button. This is especially true when the new location is in a branch of the same tree as the one you're replacing. ■

There are two additional options at the bottom of the Trusted Locations section in the Trust Center, shown in Figure 48-29:

- **Allow Trusted Locations on my network (not recommended):** Sometimes, locations on your network will be listed under Policy Locations. Other times, such as when explicitly adding a workgroup location (File ➪ Options ➪ Advanced ➪ File locations), you might want to add that location as a trusted location as well. Microsoft doesn't recommend adding network locations to the Trusted Location list, but sometimes it's necessary. As noted earlier, it's *your* foot.
- **Disable all Trusted Locations:** Use this option if you don't trust the files in Trusted Locations, if you suspect that a rogue macro is running amok and you are trying to find it, or if you want to explicitly identify the source of macros that are being run on your computer. With this option enabled, only files signed by Trusted Publishers will be trusted.

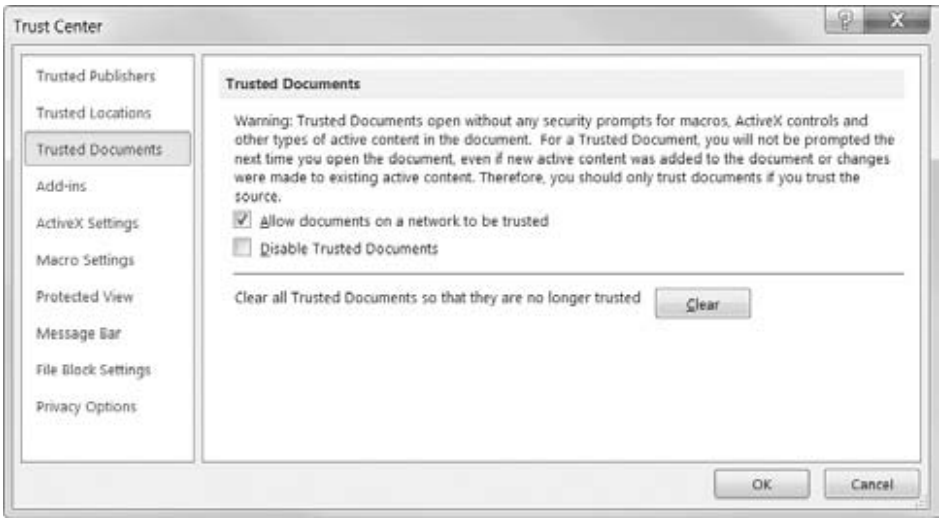
Trusted Documents

This feature is new in Office 2010. This allows better granularity and control than trusted publishers and locations, allowing you to grant immunity to scrutiny for a particular document, continuing in that fine tradition established earlier: It's *your* foot.

At the same time, as shown in Figure 48-31, this feature also lets you preemptively just say "No" to all trusted documents, as well as documents on a network.

FIGURE 48-31

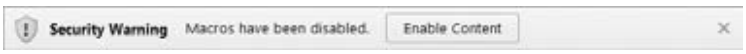
The Trusted Documents feature allows you to trust specific documents on a one-by-one basis. It also lets you disallow the Trusted Documents entirely.



When this feature is enabled, you will see the Security Warning shown in Figure 48-32. Click Enable Content only if you need the active content and only if you trust whoever created it.

FIGURE 48-32

Do not click Enable Content unless you are positive that the document is 100% safe.



Add-Ins

Use the Add-ins tab to set the additional security settings shown in Figure 48-33.

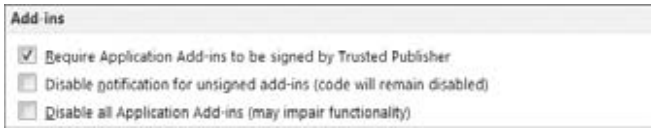
Three options are available:

- **Require Application Add-ins to be signed by Trusted Publisher:** Choose this option to tell Word not to use add-ins unless they have been digitally signed. If an unsigned add-in is encountered, Word's message bar displays a notification that the add-in has been disabled (unless the following option is checked).

- **Disable notification for unsigned add-ins (code will remain disabled):** This check box is disabled unless the preceding option is also checked. Add-ins that aren't signed are disabled, but the user isn't notified.
- **Disable all Application Add-ins (may impair functionality):** Click this check box if you don't trust any add-ins. All add-ins are disabled, the other add-in check boxes in this dialog box are grayed out, and you will not be notified when specific add-ins are denied access. This setting does not take effect until all Office 2010 programs have been closed. The settings then take effect when Office 2010 programs are restarted.

FIGURE 48-33

The Add-ins settings often are used in troubleshooting.

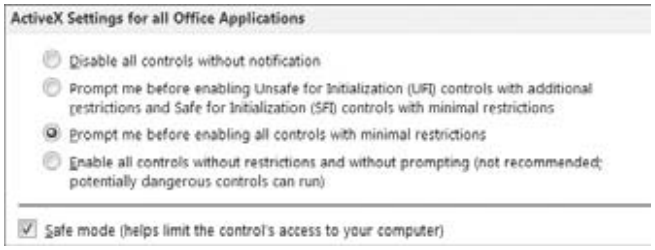


ActiveX Settings

Use the ActiveX settings, shown in Figure 48-34, to enable or disable ActiveX controls. Note that these settings do not apply to ActiveX controls contained in files that are in Trusted Locations.

FIGURE 48-34

Use ActiveX settings to limit/enable the availability of ActiveX controls.



- **Disable all controls without notification:** Choose this option to prevent all ActiveX controls from running. Select this option if either you don't trust the ActiveX controls or you don't want them running for some other reason. When you choose this option, all ActiveX controls in all Office documents are disabled. They are replaced by a red X or a picture of the control. The application message bar will not advise you that ActiveX controls are disabled.

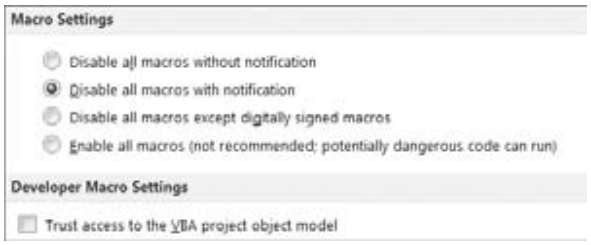
- **Prompt me before enabling Unsafe for Initialization (UFI) controls with additional restrictions and Safe for Initialization (SFI) controls with minimal restrictions:** The effects of this option depend on whether documents that contain ActiveX controls also contain VBA projects. If they contain one or more VBA projects, then all ActiveX controls are disabled, but a message bar appears that lets you selectively enable them. If there is no VBA project, SFI controls are not blocked, and there is no prompt. UFI (unsafe for initialization) controls are disabled, but a message bar prompt will let you enable them.
- **Prompt me before enabling all controls with minimal restrictions:** This is the default option. Effects vary (as in the preceding option) depending on whether the ActiveX's container document also contains one or more VBA projects. If VBA is present, ActiveX controls are disabled with notification and the options to enable them. When you click Enable, all ActiveX controls (both SFI and UFI) are enabled. If there is no VBA project, all ActiveX controls are enabled, period.
- **Enable all controls without restrictions and without prompting (not recommended, potentially dangerous controls can run):** Click this option if you don't value your foot. This enables all ActiveX controls, period. Seriously, use this option only if you work in a 100% controlled environment in which there is no possibility of rogue controls being present (for example, if you are not connected to a network or the Internet and never copy files from removable media).
- **Safe mode (helps limit the control's access to your computer):** Use this check box to enable only SFI ActiveX controls that have been marked by the developer as "safe." Note that this "safe mode" has nothing to do with starting Word in safe mode. They are different concepts. Microsoft programmers have a fine tradition of giving entirely different concepts identical names. It helps prevent confusion. (Irony alert!)

Macro Settings

The options contained in the Macro Settings dialog box, shown in Figure 48-35, control how Word and other Office 2010 applications (the ones that support macros) handle macros.

FIGURE 48-35

Office 2010 must be closed and restarted for these and a number of other Trust Center settings to take effect.



Caution

One of the most frustrating things about macro settings is something that the dialog boxes don't tell you: Settings that affect whether macros run do not take effect until you close any macro-aware Office 2010 applications that might be open and then restart the program(s) of interest.

You might meticulously change all of the settings that affect macros — disabling trusted locations, disabling trusting the VBA project object model, disabling macros, and even removing trusted publishers — yet macros continue to run just fine (or not run at all, if you're trying to enable them). You might even try closing and reopening just Word. Still no dice. What they forget to tell you is that these settings don't take effect until Office 2010 has been closed. Once you understand this simple but often omitted bit of trivia, your blood pressure can return to something approaching normal. ■

We've already looked at a number of Trust Center settings that affect whether macros run. Macro Settings (refer to Figure 48-35) provide two additional settings. The first is a choice of four levels of macro security. The second is an independent check box that tells Office whether or not to trust access to the VBA project object model:

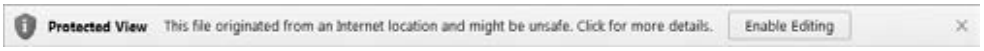
- **Disable all macros without notification:** Choose this option to prevent all macros from running. They won't run, and you won't hear about them, except that the word *all* doesn't really mean *all*. Macros in a trusted location run regardless of this setting, because documents and templates in trusted locations are not checked by the Trust Center security system. If you change this setting but macros in non-trusted locations still run, close all Office 2010 programs and try again.
- **Disable all macros with notification:** This is identical to the preceding setting, except that Word now tells you that macros are being suppressed. You can choose whether or not to run them.
- **Disable all macros except digitally signed macros:** This setting is the same as the first option, except for macros that are digitally signed by publishers in the Trusted Publishers list. If the publisher is not in the trusted list, you are notified, and you can add the publisher to the list. Unsigned macros are disabled without notification.
- **Enable all macros (not recommended, potentially dangerous code can run):** Click this option only if you like to live dangerously or your computer is 100% isolated from possible sources of malicious macros.
- **Trust access to the VBA project object model:** Choose this setting if you develop your own macros.

Protected View

New in Office 2010, this feature offers an additional line of defense against potentially harmful files, particularly those that arrive as attachments. If you've noticed Protected View warnings like that shown in Figure 48-36, Protected View settings are where you come for relief — or at least for an explanation.

FIGURE 48-36

By default, Word warns you when opening documents that might contain harmful active content.



The appearance of this kind of warning is controlled by the Protected View settings, shown in Figure 48-37.

FIGURE 48-37

Protected View settings control whether you are warned when opening ''foreign'' attachments.



Options are:

- **Enable Protected View for files originating from the Internet:** This option notes the original source for files, including those contained in Zip and other archives, and gives the Protected View warning if the file was downloaded from the Internet (for example, using a web browser).
- **Enable Protected View for files located in potentially unsafe locations:** Among other things, this setting enables Protected View for files residing in your Temporary Internet folder. Note that this is different from disabling active content, which is controlled by (among other things) Trusted Locations. For Trusted Locations, active content is blocked. For Protected View, any editing at all is blocked.
- **Enable Protected View for Outlook attachments:** This setting warns you that a file originated as an Outlook attachment. This can also serve as a reminder to save it in a known user location rather than in your Temporary Internet files location.

Message Bar

The message bar, shown in Figure 48-38, informs you if macros have been stopped from running for any reason. This is an Office 2010-wide setting. Choose "Show the Message Bar in all applications when content has been blocked" to display the bar shown in the figure. It displays at the top of the Word window. If you never want to receive notification, choose "Never show information about blocked content."

FIGURE 48-38

Keep the message bar turned on unless you like living in ignorance.



The option to Enable Trust Center Logging is used to keep track of all blocked content. The log is a text file kept in the TCDiag folder, which usually is at `C:\Users\Herb\AppData\Local\Microsoft\Office\TCDiag`.

File Block Settings

New in Office 2010, File Block Settings allow you to control how Word treats files of specific types, shown in Figure 48-39. The bottom options control how Word interprets the check marks:

- **Do not open selected file types:** Word will not open the files at all. Instead, you will receive an error notice telling you that the file type is blocked by File Block Settings, and telling you how to unblock it.
- **Open selected file types in Protected View:** This setting allows you to open and view checked file types, but does not have an Enable Editing button in the Protected View message bar. There is a "Click for more details link" that leads to the Info tab in Backstage, and a link there to File Block Settings.
- **Open selected file type in Protected View and allow editing:** This setting allows you to open the files, and provides an Enable Editing button.

Use the Open check boxes to choose which files to prevent or interfere with opening and editing. For each of the File Block Settings options, if Save is checked, you will not be allowed to save in that format. However, there's an escape clause, shown in Figure 48-40.

I guess you could call this the "make me think about it" option. Suppose, for example, that your office is trying to explicitly avoid using `.doc` format anymore, except when absolutely necessary. If you check the Save boxes for all of the pre-Word 2007 formats, Word will effectively remind you that you're not supposed to save in those formats if you should happen to try.

FIGURE 48-39

Use File Block Settings to control how or if Word opens and saves specific file types.

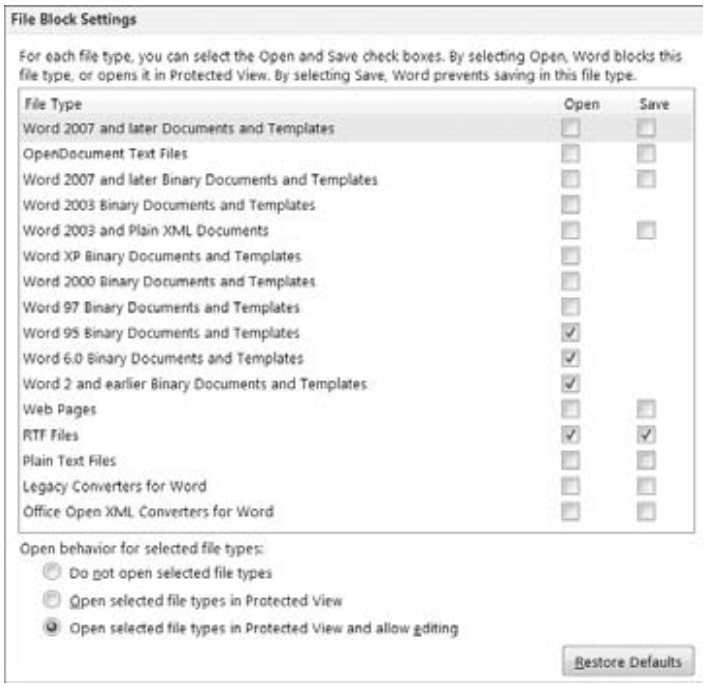


FIGURE 48-40

When you choose to Enable Editing, Word also lets you Enable Saving.



Note

What are binary formats? In the list of file types, *binary* means `.doc` or `.dot` format. A bit of a misnomer, binary is used to refer to files that do not contain just plain ASCII text. Notice that the top Word 2007 and later ... item does not contain the word "binary," whereas all of the other Word document formats do. So, implicitly, `.docx`, `.docm` and other x-formats must be plain ASCII. Right? To see why this is silly nomenclature, try opening a `.docx` file using Notepad, which is a plain-text editor. Do `.docx` files look like plain text to you? Not to me, either. That's because they're really Zip files, which is not a plain-text format. They contain a combination of `.xml` files (which are plain-text files that contain XML tags) and graphics files (which, by their definition would have to be binary). So much for nomenclature. I'll save the lecture on why *binary* is itself a misnomer for a different book. ■

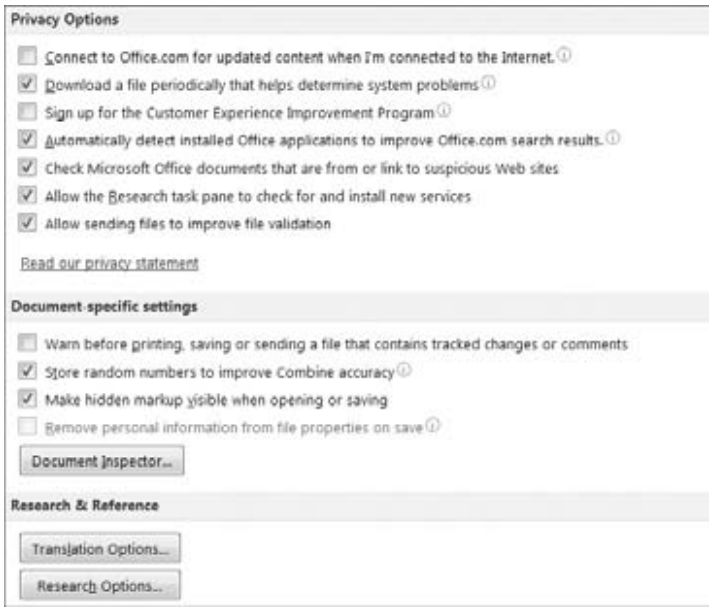
Privacy Options

By the way, in Figure 48-39,"Word 2007 and later Binary ... " refers to `.doc` and `.dot` files that were saved by Word 2007 or Word 2010. While neither has their own "binary" format, internally, Word 2010 differentiates among different `.doc`/`.dot` files, and can tell Word 2003-saved files from those saved by Word 2007 or Word 2010.

Privacy options, shown in Figure 48-41, affect when and whether Word connects to the Internet, as well as the kinds of data that can be saved in Word documents.

FIGURE 48-41

Privacy options aren't just about privacy.



Privacy options are:

- **Connect to Office.com for updated content when I'm connected to the Internet:** Use this option to include online sources of Help and Templates. This can make accessing help a good deal slower. It sometimes can present so many potential sources of help that it can make them harder to sort out, greatly reducing the relevancy ratio. I recommend that you keep this setting turned off, and turn it back on only if you don't find what you're looking for in your local offline Help.
- **Download a file periodically that helps determine system problems**: Episodically is more accurate. When you encounter an error, this option allows Office to use the error code to try to find additional diagnostic help online.

- **Sign up for the Customer Experience Improvement Program:** When enabled, this option causes information on feature usage and program errors to be reported to Microsoft. This data collection is anonymous and non-intrusive, and actually is used in resolving bugs and shaping future versions of Office. Personally, I keep it turned off because I'm paranoid.
- **Automatically detect installed Office applications to improve Office.com search results:** With this option enabled, when you search for help and the online option is enabled, Office sends the entire list of Office applications you have installed to Office.com. With this option unchecked, Help will cover only the application from which Help was invoked. Removing this check sometimes can help prevent irrelevant Help results.
- **Check Microsoft Office documents that are from or link to suspicious websites:** This option checks for *phishing* sites. A phishing site is one that has a linked URL that is different from the displayed URL, often in an attempt to lull users into believing that they are visiting a website that is different from the one actually being visited. Phishing is a common way of trying to defraud users out of account names, passwords, and financial information.
- **Allow the Research task pane to check for and install new services:** As Office 2010 matures, it is likely that new services will emerge. If you use the Research pane, enabling this option will enhance your chances of seeing new services when they become available.
- **Allow sending files to improve file validation:** When you open earlier versions of Word files, Office File Validation checks whether the file structure matches Microsoft's specification for that file format. If the file fails this check, Office opens it in Protected View. Moreover, a copy of the file is saved on your computer after you exit Word. Microsoft Error Reporting periodically asks if you agree to send a copy of these files to Microsoft. Enabling this option lets this happen. My advice is to disable this option and make sure that all computers in your enterprise/office/home have this feature disabled. This feature is an Office-wide setting.
- **Warn before printing, saving, or sending a file that contains tracked changes or comments:** This option alerts you when a document you are printing, saving, or e-mailing contains comments or tracked changes. Sometimes you want to send/print/save changes, other times not. This can be especially useful if you aren't even aware that the document contains such contents.
- **Store random numbers to improve Combine accuracy:** When combining/merging documents from multiple sources, including this number can improve merge accuracy.
- **Make hidden markup visible when opening or saving:** Enable this option to reveal any tracked changes that might be hidden (for example, by virtue of the Show Markup settings in the Review ribbon) when opening or saving a file that contains tracked changes. Note that this does not have anything to do with Word's hidden character formatting attribute.
- **Remove personal information from file properties on save:** This option is for backwards compatibility, and is available only if the current document was created in an earlier version of Word, and you used this option to remove personal information previously. To remove personal information from a Word 2010 document, use the Document Inspector.
- **Document Inspector:** This button starts the Document Inspector dialog box, which is discussed in Chapter 50. Note that this feature does not work for documents in Protected View.

- **Translation Options:** This button starts the Translation Options dialog box, which is discussed in Chapter 12.
- **Research Options:** This button starts the Research Options dialog box, which is discussed in Chapter 12.

Summary

In this chapter you've probably been exposed to more Word and Microsoft Office options than you knew either had. Among many other things, you should now be able to do the following:

- Change your macro settings so that macros run or don't run according to your wishes
- Customize your display to take advantage of Word's flexible options
- Optimize Word's AutoRecovery features to match the way you work, as well as understand how AutoRecovery works
- Set the number of documents that show up in the Recent Documents list

CHAPTER 49

Macros: Recording, Editing, and Using

Word macros are programs that you use to automate things you do in Word. At their simplest, macros can automate repetitive chores. At their most complex, macros are full-blown VBA (Visual Basic for Applications) programs that add features to Word. You can use macros to create shortcuts to features that aren't directly available and assign them to the Quick Access Toolbar or to keyboard shortcuts. You also can use a macro to perform a series of editing steps.

Why are they called macros? Macro means big. In effect, a macro is a way of boiling a lot of instructions (something big) into a single command (something small).

When Word for Windows first came out, a long time ago in a galaxy far, far away, its macro language was something called WordBASIC. At the time, it was new, exciting, and powerful, and was far easier to use than it is today, unfortunately. With that ease, however, came malice. It wasn't too terribly long before the macro virus was born, and life hasn't been as simple or as pleasant since.

As a result, much of the emphasis and coverage of macros necessarily deals with security, and how you ensure that only the macros you trust can frolic across your computer screen. In this chapter, you learn about recording macros, performing simple editing to enhance your macros, and using macros. You also learn about the aspects of macro security not already covered in Chapter 48, "Options and Settings."

Note

Providing a full grounding in macros, Visual Basic, and using the Visual Basic editor is beyond the scope of this book. If you're a Word developer, you very likely already know everything you'll read in this chapter. This chapter isn't for you. Instead, it's for users who want to know about how to get started recording and writing macros. Once you've gotten started, take a course or invest in a book devoted to Visual Basic. ■

IN THIS CHAPTER

Recording macros

Editing macros

Testing macros

Using SelfCert to create your own certificate for digitally signing macros

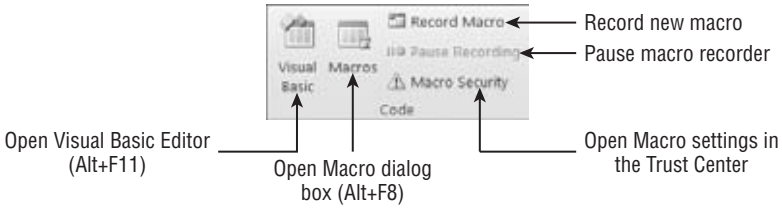
The top 10 things you need to know about Visual Basic

Macro Tools

Macro tools are generally housed in the Developer ribbon, which is hidden by default. To make it available, right-click the QAT, choose Customize the Ribbon, and place a check next to Developer in the right panel. The Developer ribbon's macro-related tools, in the Code section, are shown in Figure 49-1.

FIGURE 49-1

The Code section of the Developer ribbon provides access to tools for recording and editing macros, and controlling macro security.



It's also possible to do a fair amount of work with macros without using the Developer ribbon at all, assuming you're willing to learn the keystrokes shown in Figure 49-1. To access macro recording without the Developer ribbon showing (for example, if a different ribbon tab is showing), enable the Macro Recording tool on Word's status bar, as shown in Figure 49-2.

FIGURE 49-2

Record macros using the status bar control.



Tools in the ribbon and status bar are as follows:

- **Record Macro:** Use the Record button to begin recording a macro. Most keyboard and ribbon actions are recorded, but mouse selection and text manipulation are disabled.
- **Pause Recording:** Pauses the macro recording so you can perform actions you don't want recorded
- **Macros/Play Macro:** Opens the Macro dialog box so you can choose a macro to run, edit, create, delete, or step into

- **Visual Basic:** Opens the Microsoft Visual Basic editor, providing full access to different macro projects
- **Macro Security:** Opens the Macro Settings section of the Trust Center for setting macro security

Recording a Macro

To begin recording a macro, click the Record Macro button either in the Developer ribbon or on the status bar. This displays the Record Macro dialog box, shown in Figure 49-3.

FIGURE 49-3

Replace the default macro name with one that will help you identify it later.



In the Macro name field, type a name for the macro. Note that macro names can contain letters, numbers, and the underscore character, but cannot contain spaces. By default, Word numbers new macros sequentially. However, those names are not terribly useful. Replace the Macro# with a name that indicates something about what the macro will do. In Description, type a succinct description of the macro's intended purpose.

Note

If you give a macro the name of a built-in Word command, your macro will replace the built-in command while the template or document in which the macro is stored is active. To restore a command to its default, simply delete the macro. To see a list of built-in command names, click the Macros button in the Developer ribbon, and set Macros In to Word Commands. Of course, you probably don't want to do that right now if you're in the middle of recording a macro. ■

Use the drop-down arrow next to Store macro in to set the storage location. Macros can be stored in templates or documents. The default location makes the macro available in all documents, and stores the macro in `Normal.dotm`. If you choose to store the macro in a `.dotx`

or .docx file, ultimately, as discussed in Chapter 5, the containing file will need to be saved as a .dotm or .docm file. This is discussed later in this chapter.

From the Record Macro dialog box, so you can easily access and test your macro, assign it to run from either a Quick Access Toolbar button or a shortcut key. Ultimately, it could be assigned to both, but you can only do one or the other from the Record Macro dialog box. Hence, you have three options:

- To run the macro from the Quick Access Toolbar, click Button. Word displays the dialog box for customizing the QAT. In the upper-right corner, use the drop-down arrow to set the storage location. In the left panel, click the only macro listed, and then click Add ➪ OK. You can easily remove the button later, if desired (right-click it on the QAT and choose Remove from Quick Access Toolbar); see Chapter 46 for more on customizing the QAT.
- To assign the macro to run from a shortcut key, click Keyboard. In the Customize Keyboard dialog box, press the shortcut key(s) you want to use. Set Save changes in to the appropriate location, and then click Assign ➪ Close.
- Do neither of the above and click OK. To run the macro, you will need to click Play, select the macro from a list, and click Run.

After making an assignment or clicking OK, Word displays the Recording Macro pointer. In addition, on the status bar, the Record Macro tool changes from a red ball to the blue square, below the Recording pointer shown in Figure 49-4 (without the color).

FIGURE 49-4

Word has two ways to indicate that macro recording is in progress.



When recording is in progress, your mouse options are restricted. You can select commands from the QAT and ribbon using the mouse, but you cannot use the mouse to select text or perform other editing. For selection and other editing, you need to rely upon a combination of the keyboard, ribbon, and QAT.

For this example, the macro is named ToggleBookmarks. Let's record a macro to toggle the display of bookmarks, both because there is no built-in command to do it and because doing it using the Word Options dialog box requires a number of steps.

While the recorder is recording, choose File ➪ Options ➪ Advanced. Scroll down to Show Document Content and click to reverse the current setting of Show Bookmarks, regardless of its current setting. Click OK.

On the status bar, click the blue square, indicated in Figure 49-5, to stop the macro recorder. At this point, you have a macro that sets the current state of bookmark display — not very useful as such. To make it useful, you need to edit it to turn it into a toggle instead.

FIGURE 49-5

When macro recording is in progress, the status bar Record Macro button turns into a blue square.



Ideally, when you record a macro, it will work without further intervention. Sometimes, however (as in the current example), you need to edit it to make it do what you want.

Editing a Macro

To edit the macro, click the Macros button in the Developer ribbon. This displays the Macros dialog box, shown in Figure 49-6. Select the macro you just recorded and click Edit. If you didn't store the macro in the default location (`Normal.dotm`), you might need to set Macros in to the correct location for your macro to appear in the list.

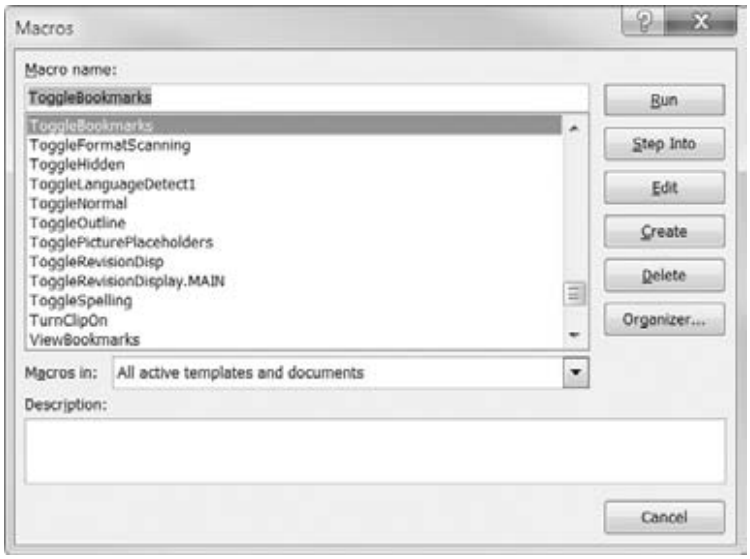
When you click Edit, Word opens the Visual Basic editor, as shown in Figure 49-7. The section on the left is called the Project Explorer. Because the macro was saved in `Normal.dotm`, it shows up in the NewMacros module. Ultimately, there could be many macros stored in that module. If the macro is to become a permanent addition to your tools, you probably want to create a module that contains common tools you create (for example, Toggles), and copy the ToggleBookmarks macro into it, rather than leave it in NewMacros to get lost as your library of macros grows. You look at how to create a new module and move a macro into it later in this chapter.

The right side of the window shows the contents of the NewMacros module. At the moment, it contains just one macro. If it contained more, you could use the drop-down arrow next to ToggleBookmarks to display a list of macros in the current module. Selecting a macro in the drop-down list scrolls the window to that macro.

To turn this into a toggle, you're going to have to take a couple things on faith for right now. Consider the following statement:

FIGURE 49-6

Make sure you click Edit to edit a macro you just recorded. If you click Create rather than Edit, you will be prompted to replace the existing macro.




```
ActiveWindow.View.ShowBookmarks = True
```

This statement instructs Word to set `ActiveWindow.View.ShowBookmarks` to `True`. `ActiveWindow.View.ShowBookmarks` is the state of the `ShowBookmarks` setting. If you set it to `True`, bookmarks will be displayed. If you set it to `False`, they won't be displayed. What you *want* to do is set it to the opposite of its current state.

As it turns out, this is ridiculously easy, and it might even seem that way if you enjoy and understand mathematics. The opposite of

```
ActiveWindow.View.ShowBookmarks
```

is

```
Not (ActiveWindow.View.ShowBookmarks)
```

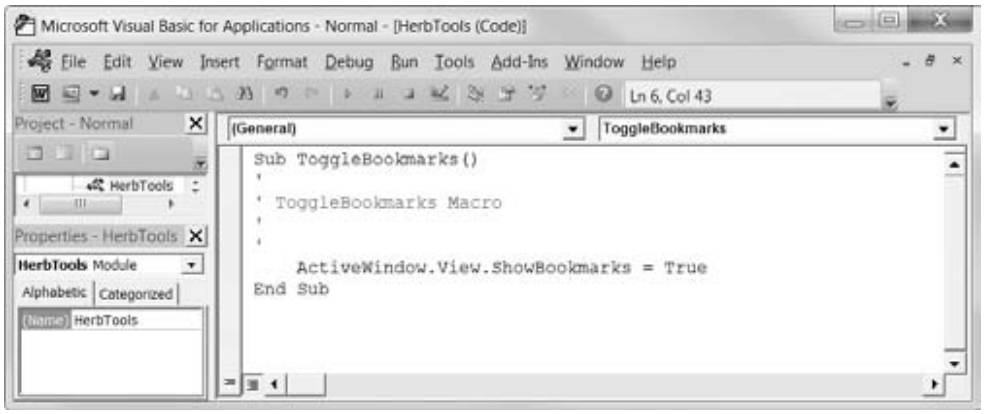
Therefore, you can turn this macro into a toggle by replacing `True` with the latter statement:

```
ActiveWindow.View.ShowBookmarks = Not (ActiveWindow.View.ShowBookmarks)
```

Make that change in the Visual Basic editing window.

FIGURE 49-7

When you edit or create a macro, Word opens the Microsoft Visual Basic editor.



Tip

It's notoriously easy to mistype Visual Basic commands. Whenever possible, take advantage of existing code and make generous use of the Clipboard to copy and paste as needed. Here, copy `ActiveWindow.View.ShowBookmarks` to the Clipboard, and paste it over `True` on the right side of the =. Put parentheses around it, and type `Not` in front of it, as shown in the preceding example. ■

Testing Your Macro

You can test your macro without closing the Visual Basic editor. If you assigned the macro to a QAT tool or to a keyboard shortcut, switch over to the Word editing window and display something you know to be bookmarked. If the current document doesn't contain any bookmarks, then type some text, select it, press Ctrl+Shift+F5, type a bookmark name, and click Add.

Now run your toggle by clicking the corresponding QAT tool or pressing the assigned shortcut key. If it works, you should see the bookmark brackets toggling on and off.

If you didn't assign a keystroke or QAT tool, you can still test the macro, but it's a bit clumsier. Position the Visual Basic editing window and the Word window so you can see both. In the Visual Basic editor toolbar, click the Run button shown in Figure 49-8.

FIGURE 49-8

When you run a macro using the Run Sub/UserForm button, it is carried out in the corresponding open Word document window.



Managing Macros

To maximize the utility of macros, there are some things you can do. As mentioned earlier, one thing you can do is create a special module for containing your macros — something other than NewMacros, which can quickly become cluttered. Another thing you can do is sign your macros so you can choose higher levels of security and still be able to run your own macros.

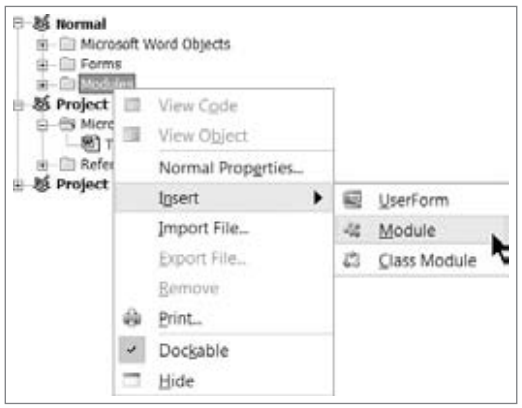
Copying Macros to a New Module

You can create new modules in `Normal.dotm` or you can create a new template for storing your macros and put that macro into your startup folder (see "Global Add-Ins," later in this chapter). Using `Normal.dotm` is easier because it requires less work.

To create a new module in `Normal.dotm`, in the Project Explorer, right-click and choose Insert ➪ Module, as shown in Figure 49-9. If the Project Explorer is not showing, choose View ➪ Project Explorer (Ctrl+R). To rename the module from the default Module# name, choose View ➪ Properties (F4). Next to (Name), select Module# (for example, Module1) and replace it with a new name, such as Toggles or MyTools (the name can contain numbers, letters, and the underscore character). Click the X to close the Properties window.

FIGURE 49-9

When you create a new module, it is named Module# (for example, Module1, Module2, and so on).



Double-click in the NewMacros module to display the contents of that module. Select from Sub ToggleBookmarks() through End Sub, right-click, and choose Cut (Ctrl+X). Double-click the new module to switch back to it. (If multiple macros are listed, go to the end of an existing End Sub, and press Enter.) Right-click and choose Paste (Ctrl+V) to insert the macro at that location. If you have additional macros to transfer, repeat the procedure.

To go ahead and save your work now, choose File ➪ Save Normal (or Save *filename,* where *filename* is the name of the file in which the currently displayed module resides). If "Prompt before saving `Normal.dotm`" is enabled in File ➪ Options ➪ Advanced, you might still be prompted to save changes later if key assignments or QAT assignments have been made.

Note

If you've been using NewMacros as your macro repository for a while, it might sometimes seem simpler to rename NewMacros rather than create a new module and move macros over after they've been created, debugged, and tested. However, if macros are assigned to the QAT or keyboard shortcuts, those assignments will no longer work. Ultimately, it's the same amount of work, but it will seem like less work if you move macros to their permanent home on an as-you-go basis. ■

Digitally Signing Your Macros

This section assumes that you don't already have a certificate for signing your own macros. If you had one, you probably wouldn't be reading this section.

Installing and Running SelfCert

First, make sure that you can create a certificate for yourself. Choose Start ➪ Control Panel ➪ Programs ➪ Uninstall a program ➪ Microsoft Office 2010 ➪ Change ➪ Add or Remove Features ➪ Continue ➪ Office Shared Features. If Digital Certificate for VBA Projects is not set to Run from My Computer, use the drop-down arrow to set it, click Continue, and follow the setup instructions. Close the Add or Remove Programs dialog box when you're done.

Choose Start ➪ All Programs ➪ Microsoft Office ➪ Microsoft Office 2010 Tools ➪ Digital Certificate for VBA Projects. In Create Digital Certificate, shown in Figure 49-10, type a name to use on the certificate — usually your own name. Click OK, and you should see a notice indicating success. Dismiss that dialog box.

Note

SelfCert certificates are for personal use only on the computer on which they were created. ■

Signing Your Macros

If it's not already open, open the Visual Basic editor (Alt+F11). Expand the template or document that contains the macro project(s) you want to sign, click in the project you want to sign, and choose Tools ➪ Digital Signature to launch the Digital Signature dialog box shown in Figure 49-11. Click Choose, select your signing certificate, and then click OK ➪ OK.

Note

After signing a project, you might still need to close it and Word before your certificate takes effect. ■

FIGURE 49-10

You can create a certificate for signing your own macro projects.



FIGURE 49-11

Click Choose to pick a signing certificate.



Macro Security

Macro security is one of those areas that has the power to thoroughly confuse and frustrate Word users. One of the primary reasons is that a number of settings are Office-wide, and take effect when any macro-capable Office 2010 program is started. When you change settings, the changes often do not take effect until you close all macro-capable Office 2010 programs and restart. Some other settings don't take effect until just Word is closed and restarted. Let's start with four commandments. These represent elevated stages, so try them in order:

1. When you make a change to Word's macro security settings and do not see a change in Word's macro behavior, close all instances of Word that are running and try again.

2. When closing and restarting Word doesn't change Word's macro behavior, close all Office 2010 programs and try again.
3. When changing a security setting and closing/restarting Office 2010 doesn't change Word's macro behavior, use Windows Task Manager to make sure all Office applications are really closed, and if not, close them and try again.
4. When none of the above changes Word's macro behavior, check whether the recalcitrance is caused by a different security setting.

Confirming Office Is Really Closed with Windows Task Manager

For many users, Windows Task Manager is an essential tool. They could not get through a day of computing without it. Many others need Windows Task Manager but simply don't know about it. There is a special name for computer users who don't *need* Windows Task Manager. They are called non-Windows users. Two popular varieties are Macintosh and Linux users, but we digress.

To start Windows Task Manager, press Ctrl+Alt+Delete and click Start Task Manager. If pressing that key combination frightens you (even though it can't reboot or shut down Windows), right-click a blank area in Windows' taskbar either in the Quick Launch bar or in the running tasks area, and choose Start Task Manager instead. If you don't see it listed, try right-clicking elsewhere in the taskbar. One of these methods should start the Windows Task Manager, shown in Figure 49-12.

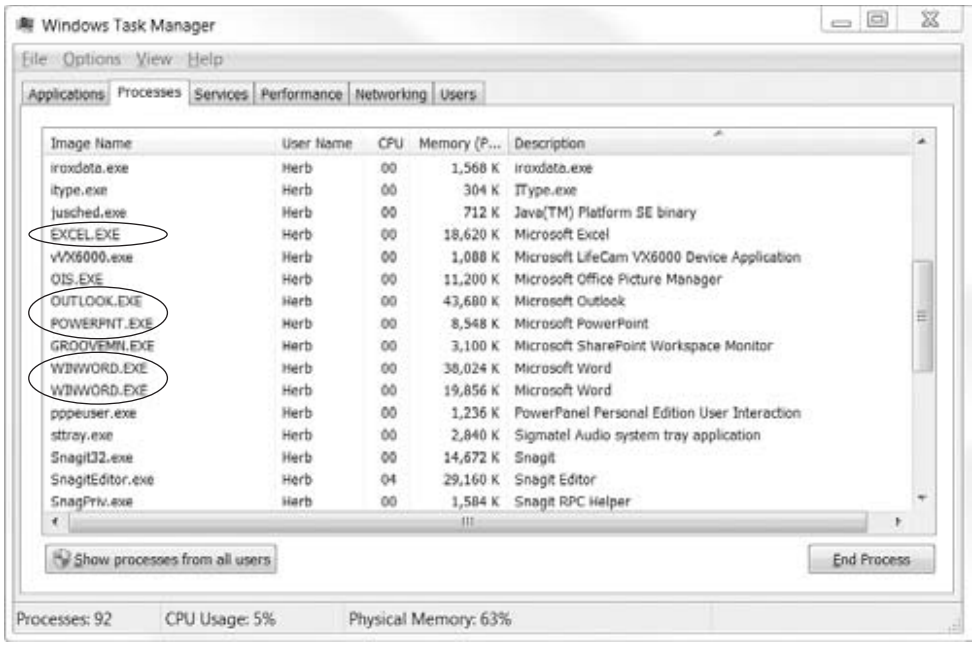
Look first in the Applications tab. Even if no Office applications show up there, it's possible that one or more are still running but unable to close due to an unseen problem. Click the Processes tab in Windows Task Manager and see whether an Office program is running. In particular, look for the following:

- WINWORD.EXE (Word)
- ONENOTE.EXE (OneNote)
- ONENOTEM.EXE (OneNote Launcher)
- OUTLOOK.EXE (Outlook)
- EXCEL.EXE (Excel)
- MSACCESS.EXE (Access)
- POWERPNT.EXE (PowerPoint)
- MSPUB.EXE (Publisher)
- SPDESIGN.EXE (SharePoint Designer)

If any of these are still running, you can try closing them using Windows Task Manager. With some, such as Outlook, however, forcing it to close can result in data loss and possible damage to your Outlook data file. Try starting Outlook normally, wait until it is fully open, and then choose File ➪ Exit. Wait two minutes to see if it has now disappeared from the list of running processes. If not, try logging out of your Windows session and then logging back in. When you log out, this forces all programs in the current session to close.

FIGURE 49-12

Use the Processes tab in Windows Task Manager to determine whether you have running instances of Office applications.



Macros and Security

Keeping the commandments in mind, Word's macro behavior is governed by a number of different settings, most of which are covered in Chapter 48, Options and Settings. When Word appears to be unresponsive to changes in security settings, it's likely due either to a need to close all of Office for the change to take effect or to layers of security that are affecting things from multiple directions. Security settings that affect whether or not macros run are as follows:

- **Macro settings:** Check File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Macro Settings (see Chapter 48, Options and Settings). A frequent problem is that all macros are disabled except for digitally signed macros. The workaround is usually digitally signing all the macros, and then closing and restarting Word. Putting the template or file containing the macros into a trusted location can also solve the problem.

Caution

When given a choice between putting a document into a trusted location versus designating the document's location as trusted, unless the location contains just that one file, it's almost always safer to move the document into a trusted location. If you set a general storage area as "trusted," it's too easy for untrustworthy files to be inadvertently saved to that location. Moving files one at a time, however, requires more thought and attention, and accidents are less likely. ■

- **Trusted Locations:** Check File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Trusted Locations (see Chapter 48). A common problem is that this setting often is forgotten, so efforts to prevent a certain set of macros from running fail. Moving the file that contains them to a non-trusted location usually solves the problem. Better still, it solves the problem without having to close and restart Word or Office.
- **Trusted Publishers:** Check File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Trusted Publishers (see Chapter 48).
- **Add-ins:** Check File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Add-ins (see Chapter 48).
- **Message Bar:** Check File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Message Bar (see Chapter 48). A common problem is that opportunities to add a publisher to your trusted publishers aren't presented because the message bar is disabled. If you want to take advantage of the prompt to trust a given add-in, you must enable the message bar for the prompt to appear.
- **Unsigned Macro Project:** In the Visual Basic editor, choose Tools ➪ Digital Signature. See "Installing and Running SelfCert," earlier in this chapter.

Macro Storage

Macros can be stored in macro-enabled document templates or in macro-enabled documents. If you upgraded to Word 2010 from an earlier version of Word, note that this is new. Before Word 2007, all Word documents had the `.doc` extension, and all Word templates had the `.dot` extension (except for a certain subset called *wizards* that had the `.wiz` extension, once upon a time).

As discussed in earlier chapters, Word 2010 has four different native file formats:

- **.docx:** Ordinary Word file that cannot contain macros
- **.docm:** Macro-enabled document file
- **.dotx:** Plain document template that cannot contain macros
- **.dotm:** Macro-enabled document template file

When you record or otherwise create a macro and instruct Word to store it in a `.docx` or `.dotx` file, Word doesn't balk at that point. When you save the file, however, Word now tells you that you cannot save the VBA project in a macro-free document, as shown in Figure 49-13.

To save the macros, choose No. Word then opens the Save As dialog box. Under Save as Type, choose either Word Macro-Enabled Document (`*.docm`) or Word Macro-Enabled Template (`*.dotm`), as shown in Figure 49-14.

Global Add-Ins

If you choose to store your macros in `Normal.dotm`, they are automatically loaded when you start Word. Any shortcut keys or Quick Access Toolbar tools assigned to run macros will run just fine, assuming that the macros and shortcuts are stored in `Normal.dotm`.

FIGURE 49-13

VBA projects can be saved only in .docm or .dotm files.

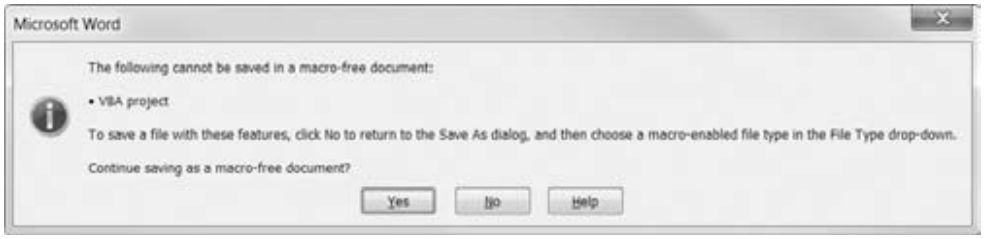
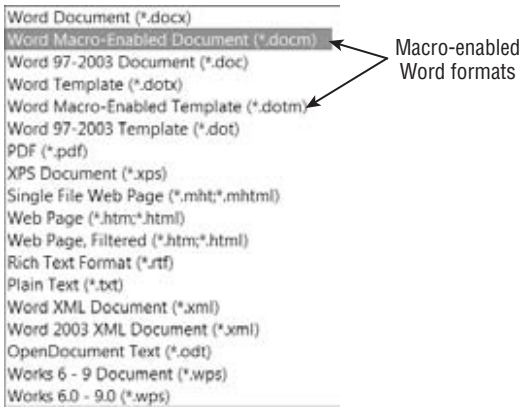


FIGURE 49-14

Macros can be saved only in macro-enabled documents and templates.



When a template or other add-in is available throughout the Word session, it is known as a *global* template or add-in. `Normal.dotm` by default is a global add-in. Other global add-ins can be loaded in one of two ways. They can be stored in Word's Startup folder, in which case they are loaded when Word starts, or they can be explicitly loaded using the Template and Add-ins dialog box.

To copy a file to the Startup folder, you first need to determine where that is. Choose File ➪ Options ➪ Advanced ➪ File Locations. Click Startup ➪ Modify. Use Look in to determine the path where Startup is located. Then, open Windows Explorer and copy the template file to that location. The next time you close and restart Word, any Word template files in your Startup folder are loaded as global add-ins.

The other way to load a global add-in is using the Templates and Add-ins dialog box, shown in Figure 49-15. To see a list of global templates and add-ins, click Document Template in the Developer ribbon. Under Global templates and add-ins, any templates loaded from the Startup

folder are listed, along with any that you have added here previously. When you open Word, only templates in the Startup folder are loaded. Other templates you've loaded in past sessions are listed, but are not checked. Place a check next to any unloaded templates you want to load. To load a template not listed, click Add. In the Add Template dialog box, the starting location is Trusted Templates. If the template you want isn't there, navigate to its location, select it, and click OK. Note, however, that depending on your macro security settings, if the template is *not* in a trusted location and isn't otherwise permitted, its macros will be disabled when you try to access them.

FIGURE 49-15

You can add and remove global templates using the Templates and Add-ins dialog box.



One option is to designate a `.dotm` file other than `Normal.dotm` as your main storage location for macros, and store that file in Word's Startup folder. That way, your macros are loaded when Word starts. Moreover, if `Normal.dotm` becomes corrupted (which, unfortunately, is altogether likely at some point in your Word career), your task of rebuilding won't be quite as onerous, because you won't have all of your eggs in one basket, so to speak.

Note

If you choose to store your everyday macros in a `.dotm` file other than `Normal.dotm`, while the macros themselves are not stored in `Normal.dotm`, any key assignments or Quick Access Toolbar assignments that access those macros must be stored in `Normal.dotm` in order to work. ■

Automatic Macros

In designing document templates, as well as in setting up the Word editing environment, it sometimes is useful to perform setup or housekeeping chores. To facilitate this, Word has a collection of automatic macros you can create:

- **AutoExec:** Runs when you start Word. AutoExec works only when it is stored in `Normal.dotm`.
- **AutoOpen:** Runs when you open a document based on the template that contains it. If an AutoOpen macro is stored in `Normal.dotm`, it runs anytime a document based on `Normal.dotm` is opened, but not when a new document based on `Normal.dotm` is created. A popular use for AutoOpen is to set the desired zoom or other view-related settings when documents are opened. Another popular purpose is to update certain fields.
- **AutoClose:** Runs when a document based on the template that contains it is closed.
- **AutoExit:** Runs when you exit from Word. AutoExit works only when it is stored in `Normal.dotm`.
- **AutoNew:** Runs when a document based on the template that contains it is created. This is a very popular kind of automatic macro to use when creating active document templates. An AutoNew document can populate a new document with content, prompt for a filename or other information, insert the current date as static text, and so on.

Macros by these names do not exist until somebody creates them. For example, if you have a set of startup chores that you perform every time you start Word, the next time you start Word, before you do your startup chores, start the macro recorder, and name the macro AutoExec. Then perform your startup chores. Stop the macro recorder when you're done. The next time you start Word, your AutoExec macro will perform your startup chores for you.

Microsoft Visual Basic Q&D

You've already learned a bit about Visual Basic and the Visual Basic editor. In this section, you learn only what you need to know to get started — quick and dirty, as they say. The best way to gain an understanding of Word macros is by recording a macro and then looking at the resulting Visual Basic code to see how Word translated your actions into code.

All You Really Need to Know

Visual Basic can be intimidating, as can the Visual Basic editor. Understanding what's happening can help disarm its intimidating quality. On the other hand, too much too soon can be overwhelming, and you might never want to come back. Following are just the top ten things you need to know.

1. Starting and Toggling the Visual Basic Editor

You can start the Visual Basic editor any time you want by editing a macro or simply by starting the editor, without any particular macro in mind. To edit an existing macro or to create one, just

press Alt+F8. If you see macros listed, click one, and then click Edit. If you don't see any, type a name and click Create.

To open the Visual Basic editor with no particular destination in mind, press Alt+F11. Note that once you're in the Visual Basic editor, Alt+F11 now returns the favor, and goes back to the Word document editing window. Hence, you can use Alt+F11, effectively, to toggle between the Visual Basic editor and Word.

2. Project Explorer and Code Windows

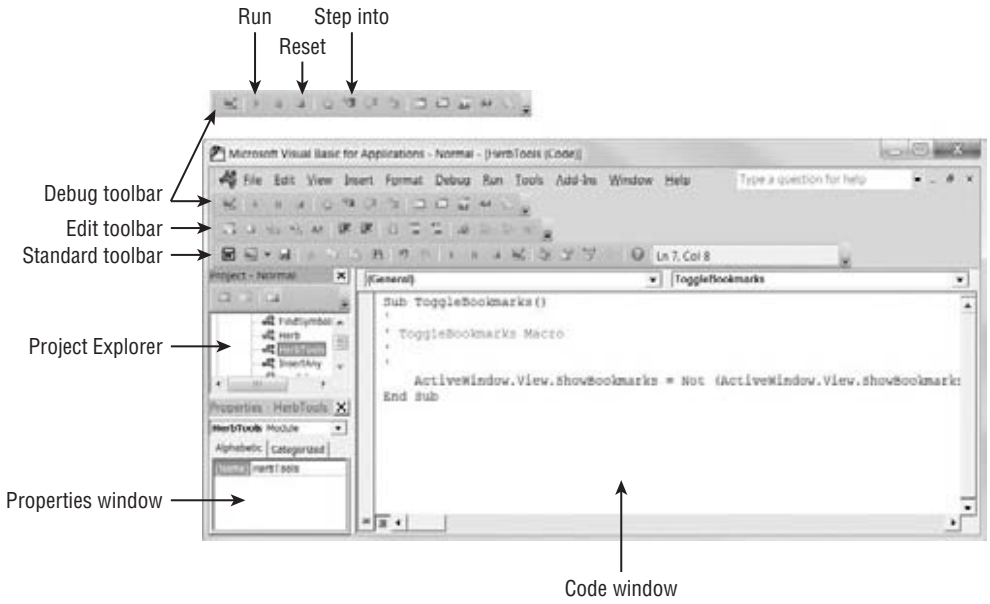
The two main sections of the Visual Basic editor you need to know about are the Project Explorer and the Code window, shown in Figure 49-16. The left side, the Project Explorer, works like any tree structure in Windows. Click + to expand, click – to collapse. Double-click to select a macro, which is then displayed in the Code window. If the Code window is ever replaced by something else, try pressing F7 to bring the code back into view.

3. Running Macros Directly from the Visual Basic Editor

You can run macros directly from the Visual Basic editor. While it's true that this works best if you have two monitors — one for showing the Visual Basic editor and another for showing the Word document window, it's not essential. In the Windows taskbar, click the Visual Basic icon, and then Ctrl+Click the icon for the Word window. Right-click either selected program and choose Tile Horizontally. Now you should be able to see both windows at the same time.

FIGURE 49-16

The Visual Basic editor can look overwhelming, but there's a lot you can ignore for now.



With the macro you're testing displayed in the Code window, click the Run button, also shown in Figure 49-16. It's available in either the Standard or the Debug toolbar. If you run into an error, click Reset, fix the error, and try again. To run the macro one line at a time, click Step into.

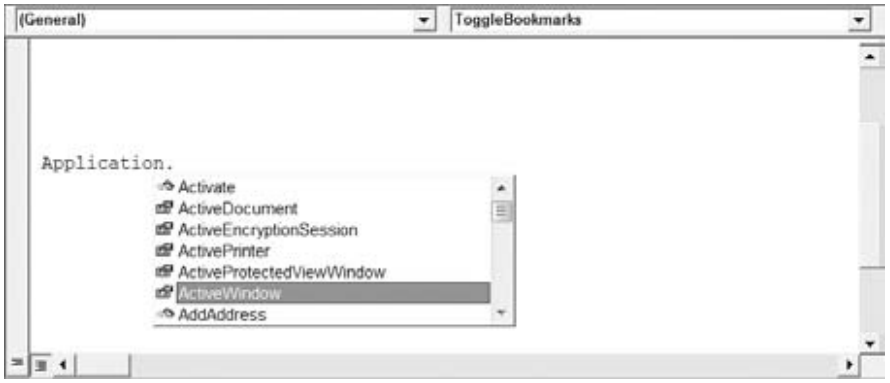
Additional Run-related commands are contained in the Run menu. You can also run a macro by pressing F5, but the Visual Basic editor window must be active for it to work. If the Word window is active, the F5 activates the Go To tab in the Find and Replace dialog box.

4. The Visual Basic Editor Reads Your Mind

When you type a Visual Basic command, the editor knows what "could" come next, and shows you a list of the possibilities, as shown in Figure 49-17. When you see what you want, press the spacebar to insert it. Sometimes Word shows you a list; other times, Word shows you the syntax.

FIGURE 49-17

When you follow a Visual Basic keyword with a period, the editor shows you a list of what can come next.



5. The Visual Basic Editor Wants to Help

If you want more information about a command, click it and press F1. More often than not, it will show you one or more examples. How's that for helpful?

6. If the Visual Basic Window Doesn't Respond . . .

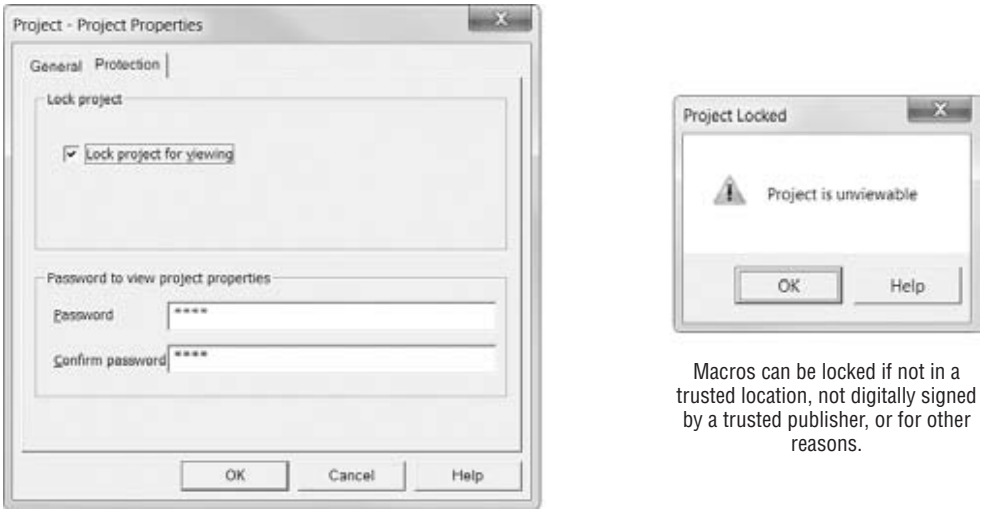
If you try clicking somewhere in the Visual Basic editing window but nothing happens, it's usually because a dialog box is open in Word itself but isn't displaying on top of the Visual Basic window. The two application windows might look independent, but they're not. Close Word's dialog box and try again.

7. If the Visual Basic Project Is "Locked," Blame Security

If you try to expand the tree in the Project Explorer but it says that the project is locked, as shown in Figure 49-18, you usually can blame those armed guards. The quickest solution is to close Visual Basic and Word, move the template that contains the macros to a trusted location, and then try again.

FIGURE 49-18

Projects can be locked for security reasons or because the project was explicitly locked by the user.



You can explicitly lock macros against editing or viewing

Macros can be locked if not in a trusted location, not digitally signed by a trusted publisher, or for other reasons.

If that doesn't work, however, it's possible that the project really is locked. In the Project Explorer window, right-click the top level of the project (identified as Normal, Project, TemplateProject, or a name corresponding to a global add-in), and choose *name* Properties (for example, Normal Properties). In the Protection tab, remove the check next to "Lock project for viewing," supply the password, if needed, and click OK.

8. The Larger Context

When you see commands listed in the code window, you're usually not looking at the entire command. Because you're within Word, Visual Basic saves space by not including the entire name. For example, consider the following brief macro, which types *Hello* at the insertion point:

```
Sub Hello()
 Selection.TypeText Text:="Hello"
End Sub
```

`Selection.TypeText` is really an abbreviation for `Word.Application.Selection.TypeText`. Because both Word and Application are assumed, however, you don't need either of those for the command to work.

9. Watch Macros as They're Being Recorded

When you start recording a macro, immediately click the Pause Recording button in the Developer tab. Press Alt+F11 to display the Visual Basic editor, and navigate to the macro being recorded. Arrange the Word window and the Visual Basic editor window so you see both. Press Alt+F11 to return to the Word window, and click Resume Recording.

Now, as you record your macro, you'll see the corresponding commands appear in the Visual Basic editor. This is a great way to get a sense of what does what, and what kind of Visual Basic commands correspond to actions in Word. You'll also discover that some things cannot be recorded. If you watch your macro as it's being recorded, you'll know what is left out and have a better understanding of what kind of editing the macro requires in order to work properly.

10. Now You Know Why It's a Good Idea to Prompt to Save Normal.dotm

When you're experimenting with macros, there are a lot of things you'll do that you won't necessarily want saved as part of `Normal.dotm`. Choose File ➪ Options ➪ Advanced. In the Save section, place a check next to "Prompt before saving Normal template."

For More Information . . .

The *Word 2010 Bible* is a lot of things, but it is not a book about how to program using Visual Basic for Applications. For that, you need other resources. A good place to start is the Visual Basic for Applications Help file. For starters, open the Visual Basic for Applications editor and press F1 to display Word Developer Help and How-to. Word 2010 Developer Reference Help and How-to. Important links when you're just starting out are Getting Started, Concepts, and How Do I. Once you're more involved in Visual Basic for Applications, you'll find the *Word Object Model Reference* to be invaluable.

Free Online Resources

You can find free online resources for learning and using Visual Basic for Applications at the following:

- `www.mousetrax.com/techpage.html#autoforms`
- `http://word.mvps.org`

Summary

In this chapter you've gotten your feet wet with Word's brand of VBA (Visual Basic for Applications). You've seen how to record a macro and test it. You've also learned a little about how to edit macros to make them do things that the recorder can't make them do. You're now also basically familiar with the Visual Basic editor, and shouldn't feel intimidated by it. At this point, you should now be able to do the following:

- Record a macro, and assign it to the Quick Access Toolbar or a shortcut key
- Manage Visual Basic projects by creating new modules and copying new macros to them
- Manage your macros by storing them in global templates other than `Normal.dotm`
- Digitally sign your Visual Basic project

Part IX

Collaboration — Getting Along with Others

Just as no man is an island, no modern computer program works in a vacuum. The final section of the *Word 2010 Bible* shows you how to integrate your Word work with the work of others and other programs.

Chapter 50 shows you how to protect your documents so you can control what happens to them and see who did what. Chapter 51 explores the different ways to compare and combine collaborative documents, even when Word's tracking features weren't being used. Chapters 52 and 53 show you how to share documents and other resources among different computers and users, using SharePoint and Groove, respectively. Finally, Chapter 54 shows you how to use Word hand-in-hand with other Office 2010 applications, such as Outlook, Excel, and PowerPoint.

IN THIS PART

Chapter 50
Security, Tracking, and Comments

Chapter 51
Comparing and Combining Collaborative Documents

Chapter 52
SharePoint and SkyDrive

Chapter 53
SharePoint Workspace

Chapter 54
Integration with Other Office Applications

CHAPTER 50

Security, Tracking, and Comments

Not too terribly long ago, about the only way you could protect a Word document was to password-protect it using a password technology that was decidedly easy to crack. Password-cracking solutions abounded and were available free or practically free. Word has come a long way since then and now offers a variety of different kinds of protection that are a lot better than what was available for Word 97 and earlier, although nothing is 100% secure.

Not only does improved technology make protection stronger, but the variety of types of protection has expanded as well. This chapter looks at the types of document protection available to Word users, and describes how to use them. You've already learned how to use Word options and settings to enable and disable running macros and other add-ins, particularly in Chapters 48 and 49. In this chapter, however, the focus is on protecting the privacy and purposes of your documents.

IN THIS CHAPTER

- Document protection
- Permissions
- Information Rights Management and Word
- Using digital signatures
- Using passwords to protect Word documents
- Inserting comments
- Tracking changes
- Reviewing comments and changes

Protection Types

One of the unfortunate things about a piece of software as complicated as Word 2010 is that privacy settings aren't all centrally located. This can make discovering the full range of what's available a bit difficult. Word 2010 is a bit improved over Word 2007 on this score, but, it still helps to have a guide. To save you the trouble of searching desperately to find what you can control, here's the definitive list of the different types of protection (and pseudo-protection) Word 2010 offers, and where to find them:

- **Permission:** Restrict a document so it can be opened and/or changed only by specific individuals. Select File ➪ Info ➪ Protect Document ➪ Restricted Permission by People.

- **Digital signature:** Sign a document with a digital signature to provide assurance that you are the source of the document. Select File ➪ Info ➪ Protect Document ➪ Add a Digital Signature.
- **Inspect Document:** Inspect the document to see if it contains private or sensitive information or data. Select File ➪ Info ➪ Check for Issues ➪ Inspect Document.
- **Mark as Final:** Mark a document as final to let recipients know that the document is considered the final revision. This setting makes the document read-only and makes it unavailable for additional typing, editing, proofing, or tracking changes. Note that this setting is advisory only — you can click the big Edit Anyway button — this removes the Mark as Final setting. Recipients with earlier versions of Word who have installed the Office 2010 Compatibility Pack won't even see the file as read-only. Hence, this kind of gentle protection would have to be combined with something more substantial to be meaningful.
- **Style formatting restrictions:** Limit formatting to a selection of styles, as well as block Theme, Scheme, or Quick Style Set switching. Protection here is by password, and is therefore less secure and robust than when using permissions. Select File ➪ Info ➪ Protect Document ➪ Restrict Editing ➪ Limit formatting to a selection of styles.
- **Editing restrictions — Read only:** This offers password protection, which is not very secure, along with exceptions of specific areas of the document. Exceptions can be made wholesale, or you can limit them to individuals with specific Windows Live ID–associated e-mail addresses. Select File ➪ Info ➪ Protect Document ➪ Restrict Editing ➪ Allow only this type of editing in the document ➪ Read only.
- **Editing restrictions — Tracked changes:** This type of protection allows only tracked changes to be made. Select File ➪ Info ➪ Protect Document ➪ Restrict Editing ➪ Allow only this type of editing in the document ➪ Tracked changes.
- **Editing restrictions — Fill-in forms:** This type of protection allows filling in of form fields and content controls. Select File ➪ Info ➪ Protect Document ➪ Restrict Editing ➪ Allow only this type of editing in the document ➪ Filling in forms.
- **Editing restrictions — Comments:** This type of protection allows only comments. Exceptions can be made for selected areas of the document, for everyone, or for specific individuals (using Windows Live ID–associated e-mail addresses). Select File ➪ Info ➪ Protect Document ➪ Restrict Editing ➪ Allow only this type of editing in the document ➪ Comments.
- **Password to open/modify:** This type of protection lets you specify a password to open and/or modify the document. This protection is not the same as the Editing restrictions' No Changes setting. You must choose one or the other. Select File ➪ Save As ➪ Tools ➪ General Options.

Note

Some of these controls are also available using the Protect group on the Developer ribbon. ■

The rest of this section looks at each of these, showing how you enable protection and assessing the degree of protection provided.

Restricting Permission (Information Rights Management)

A relatively new and strong way to protect your documents uses an Information Rights Management server to authenticate users who create or receive documents or e-mail that have restricted permissions. To begin the process — assuming you're using an enterprise-enabled version of Office — choose File ➪ Protect Document ➪ Restrict Permission by People ➪ Manage Credentials ➪ Add. As noted in Figure 50-1, some enterprises have their own rights management servers. If you don't have access to one, you can use Microsoft's free trial Information Rights Management service.

FIGURE 50-1

If you don't already have access to an Information Rights Management service, you can sign up to use a free trial service.



To use this service, you and all users with whom you share rights-managed documents or e-mail must have Windows Live ID–registered e-mail addresses. The biggest risk is that Microsoft might at some point end the free trial service. You'll then have three months in which to move to a different rights management server, subscribe to whatever service Microsoft offers (assuming it

replaces the free trial service with a for-pay service), or remove rights management protection from your documents so you don't lose access to them.

To restrict permission by using Information Rights Management, choose File ➪ Info ➪ Protect Document ➪ Restrict Permission by People. If you do not have Rights Management software installed on your computer, the dialog box shown in Figure 50-1 appears. If you choose to proceed, a five-step wizard walks you through the process of setting up rights management and associating your Windows Live account.

If you are not logged on to the rights management server account you want to use, or if you need to specify, add, or remove a user account, choose File ➪ Info ➪ Protect Document ➪ Restrict Permission by People ➪ Manage Credentials, which displays the Select User dialog box, shown in Figure 50-2. If you need to add a Windows Live or other account, click Add. To remove an account, select the one you want to remove and click Remove. Select the account you want to use (if desired, enable Always use this account), and then click OK.

FIGURE 50-2

Most rights management users have only one rights management account.



Setting Up Information Rights Management

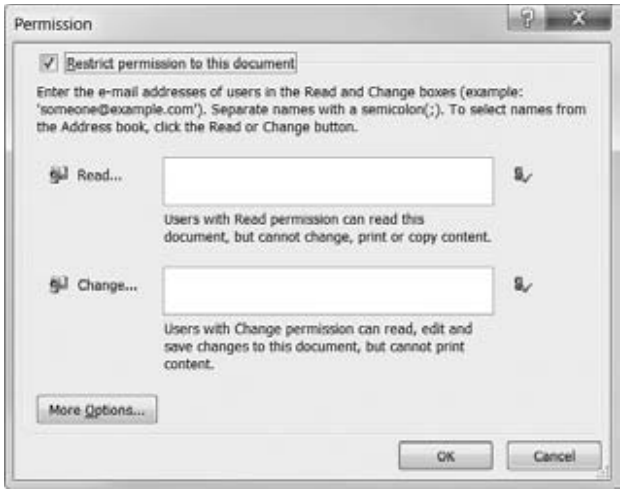
In the Service Sign-Up dialog box, choose ''Yes, I want to sign up for this free trial service from Microsoft'' and click Next. In the Welcome to the Windows RM Account Certification Wizard, choose ''Yes, I have a Windows Live ID.'' (They are so prevalent at this point that this section assumes that you have one. If you don't, choose the No option and follow that detour, and then join back up with the next step once you've set up your Windows Live account). Click Next.

In Specify Your E-Mail Address, type the address associated with the Windows Live account you want to use for rights management, and then click Next. In Select Certificate Type, read the descriptions of Standard and Temporary, make your choice, and then click Next ➪ Finish.

If credentials are already associated, and/or when you click OK in the dialog box shown in Figure 50-2, Word displays the Permission dialog box shown in Figure 50-3. Type the e-mail addresses of people with permission to read and change the document in the boxes provided. E-mail addresses should be separated with semicolons. The system automatically checks e-mail addresses you enter, but if it doesn't happen quickly enough for you, click the Check Names tools to the right of the address boxes. A colored icon next to the name means that the person has a Windows Live ID and is currently online. A gray icon means either that they're not online or that the address isn't a valid Windows Live ID.

FIGURE 50-3

You can use rights management to limit who can read and change a document.



To see more options, click More Options, not surprisingly, which displays the different Permission dialog box shown in Figure 50-4. Note that you can set an expiration date for permissions you grant. In addition, recipients of the document will not be able to print, copy, or access document content programmatically (for example, use a program to extract XML data) unless the corresponding options are checked. For additional protection, if you don't want to receive requests for additional permission, remove the check next to "Users can request additional permissions from." Once you've selected permissions, click Set Defaults to make the selected permissions the default for future documents on which you restrict permissions.

Click "Require a connection to verify a user's permission" to require that individuals to whom you are granting permissions be connected to the rights management server, either over the Internet or over the respective intranet. Note that if you have not installed the Windows RMS client for Rights Management Services, this option will be grayed out as unavailable.

FIGURE 50-4

You can set an expiration date as well as restrict permission to copy or print a document.



When you click OK in either of the dialog boxes shown in Figure 50-3 or Figure 50-4, Word adds the Permission is currently restricted . . . bar at the top of the document window, shown in Figure 50-5.

FIGURE 50-5

The Permission is currently restricted . . . message bar is not affected by the Message Bar setting in the Trust Center, described in Chapter 48.



Removing Access Restrictions

When and if there is no longer a need to restrict access to a document, choose File ➪ Info ➪ Protect Document ➪ Restrict Permission by People ➪ Unrestricted Access. Click Yes to the prompt that asks if you're sure you want to remove permission. Note that you're not removing permission. Rather, you're removing permission restrictions.

Digital Signatures

A *digital signature* is an electronic certificate that provides a way for recipients to verify that a document or e-mail actually came from the sender. Can these certificates really provide such verification? That's an article of faith, perhaps — an appropriate enough concept for a Bible, one supposes. Use and trust digital signatures according to your own personal beliefs. You assume any and all risks.

Note

Personally, I don't trust digital signatures. They seem like a gimmick to get potentially billions of Internet users to fork over a few dollars a year for something that, at present, provides no assurance at all (to skeptics, at any rate). When I receive e-mail containing a digital signature, warning bells immediately go off because nobody with whom I exchange e-mail actually uses digital signatures. Hence, the only e-mails I ever get that have digital signatures have been part of some scam to try to convince me to share various account numbers. The bottom line? If you receive something important and the validity of the signature is an issue, then you are going to pick up the telephone and call the sender to verify the contents. You aren't going to take a digital signature at face value, and neither am I. ■

How to Digitally Sign a Word Document

To digitally sign a Word document, choose File ➪ Prepare ➪ Add a Digital Signature. If this is the first time you've used this feature, or if you didn't previously choose "Don't show this message again," Word displays the dialog box shown in Figure 50-6. If you already have a digital signing certificate, click Yes. Otherwise, you can dismiss the dialog box (if you've changed your mind) or click Signature Services from the Office Marketplace.

FIGURE 50-6

If you don't already have a digital signing certificate, click Signature Services from the Office Marketplace to learn about for-fee and for-free services.



If you choose the Signature Services option, Word takes you to a Digital Signing site on the Microsoft Office website. There, you can use a commercial service to buy a digital certificate. As this is being written, at least one certificate authority is offering a free digital signature to private individuals (non-business).

If you choose OK, and the document has not been saved, you are prompted to save the file as a Word document. Word then displays the Sign dialog box, shown in Figure 50-7. You do not need to provide a purpose for signing the document, but you can if you want. To see exactly

what you are signing and what information is provided along with the signature, click the link at the top of the dialog box: See additional information about what you are signing. If the Signing As identity/certificate isn't the one you want to use, click Change. If everything is as you want it, click Sign, and the Signature Confirmation message appears, as shown in Figure 50-8.

FIGURE 50-7

If you're not sure about the signing identity, click Change to see additional signing certificates as well as information about this one.



FIGURE 50-8

Don't sign a document until you're finished making changes to it.



Removing a Signature

Once you've signed a document, the document is locked against further changes until the signature is removed. Unlike document permissions, a digital signature can be removed from a Word document by anyone with the appropriate version of Word. Once removed, however, it can be signed only by the owner of a signing certificate. Hence, if you remove my signature, you can edit the file I sent you and make any changes you want to. However, you will not be able to restore my signature.

Caution

Let's be honest here. You can use a free service to obtain a certificate with my name on it and affix that signature to a document and claim that I signed it. However, if it comes from the same CA (Certificate Authority) I used, it can't be associated with my e-mail address, which proves it's not really my signature; and if it doesn't come from the same CA, I can use that as proof that it's not really my signature. Presumably, there are ways to determine whether a signature is valid, but there are ways to make a forged signature look valid, and not everyone is sufficiently skeptical. Forewarned is forearmed. ■

To remove a signature from a document, choose File ➪ Info ➪ View Signatures (unless the Signatures pane is already showing). Right-click the signature and choose Remove Signature. At the prompt shown in Figure 50-9, click Yes.

Don't let the words "permanently" and "cannot be undone" throw you. This simply means that you can't remove someone's signature, change that $1,000 fee to $100,000, and then reaffix their signature. Once you remove someone's signature, only they can put it back.

FIGURE 50-9

''Permanently'' and ''This action cannot be undone'' don't mean the document can't be signed again, just that Ctrl+Z won't do it.



Document Inspector (Removing Private/Personal Information)

You can use the Document Inspector to see what private or personal information resides in a file, and remove it. The Document Inspector checks for the kinds of information and content shown in Figure 50-10. To display the Document Inspector, choose File ➪ Check for Issues ➪ Inspect Document. By default, all six areas are checked. Remove checks if you don't want those kinds of information removed. For example, if the purpose for sending a document to someone is to convey the XML data it contains, then remove the check next to Custom XML Data. On the other hand, if the document might contain "colorful" comments about someone's draft, you probably do want to inspect it for those. When the right checks are checked and the wrong checks are unchecked, click Inspect.

FIGURE 50-10

Use the Document Inspector to remove private/proprietary information before passing a document along to someone else.



The Document Inspector inspects the current document for each of the types of material or data indicated. If it finds any, the Document Inspector dialog box is redisplayed, with Remove All buttons next to each type of content that was found, as shown in Figure 50-11.

Caution

Make a backup copy of the document before using Remove All. Once you remove the content using the Document Inspector, you can't get it back using Undo. Particularly for comments and data, if they are content you need to preserve, make a backup copy of the document. ■

There is no facility in the Document Inspector for further inspecting to see exactly what it found. You have two options: click Remove All to do exactly that, or click Close and conduct a closer personal inspection. You can remove the content yourself manually or you can return to the Document Inspector and use Remove All once you're satisfied that you really want it removed.

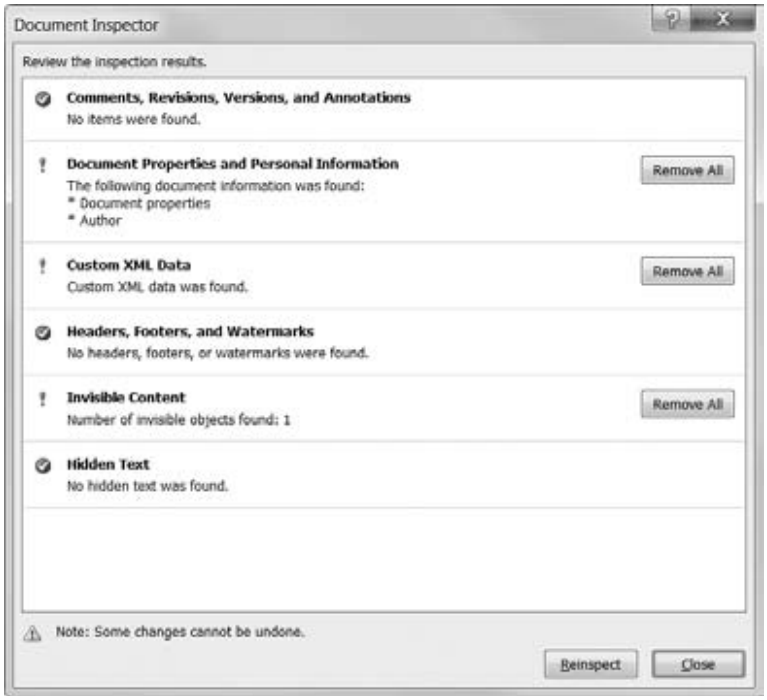
What Is Invisible Content?

A new feature in Word 2010 — one that both Excel and PowerPoint 2007 had — is the ability to format graphical objects as invisible, as long as they do not have wrapping set to In line with

text. To see how this works, open any `.docx` document that contains floating graphics. In the Editing section of the Home ribbon, choose Select ➪ Selection Pane.

FIGURE 50-11

A red exclamation mark means that the Document Inspector found potentially sensitive content, and the check mark indicates that the specified type of content was not found.



Each "qualified" object will have an eye icon (or, an eye-con, if you'll excuse the pun) next to it. Clicking the icon makes the associated object invisible. You can use this to hide shapes, textboxes, SmartArt, and charts. You cannot unbundle parts of a chart or SmartArt object — it's all or nothing.

When you click Remove All in the Document Inspector, it actually does remove the hidden objects. It doesn't just make them visible. So, exercise caution if you really do need those objects — it's a good idea to create a for-distribution copy of the document.

Formatting and Editing Restrictions

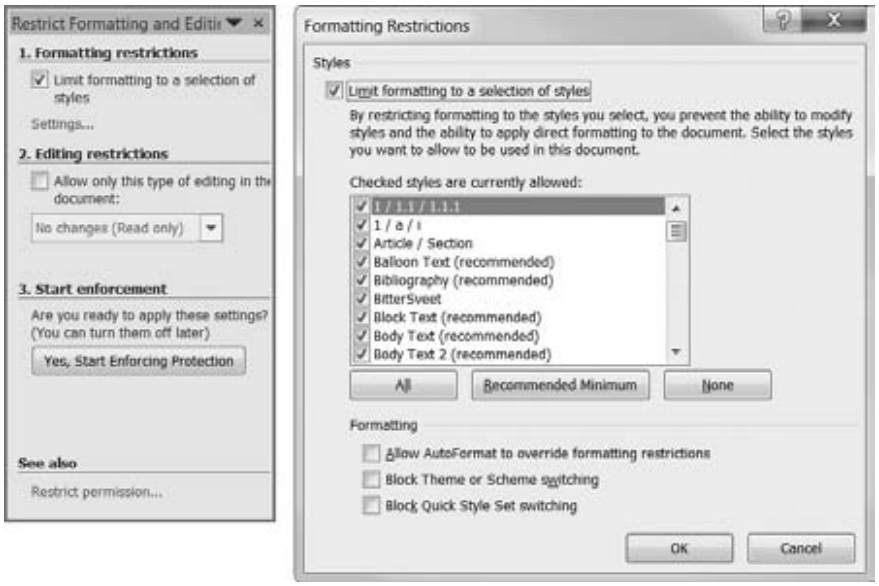
Rights management represents one general area of document protection, and it is certainly more formidable and secure than most of what you can do using formatting and editing restrictions. However, if you choose not to install and use rights management software, the Restrict Formatting and Editing settings can provide a measure of protection.

Limit Formatting to a Selection of Styles

To limit formatting to certain styles, in the Review or Developer ribbons, choose Restrict Editing, which displays the Restrict Formatting and Editing pane shown in Figure 50-12, and then click to place a check next to "Limit formatting to a selection of styles." To choose which styles, click Settings. The Formatting Restrictions dialog box now appears, also shown in Figure 50-12.

FIGURE 50-12

With ''Limit formatting to a selection of styles'' checked, click Settings to choose those limits.



The Formatting Restrictions dialog box provides the following options:

- **Checked styles are currently allowed:** Place a check next to each style you want to allow. Remove checks for styles you want to disallow. Note that the styles listed might be limited based on settings in the Manage Styles dialog box, discussed in Chapter 9. See Chapter 9 if you need to liberate additional styles from captivity before they will display here. Note that Normal is not included in the list. As much as you might like to, you can't deny access to the Normal style.
- **Recommended Minimum:** If the list is too inclusive, click Recommended Minimum, and then add or remove checks as needed.
- **None:** If the style list is way too inclusive, then choose None, and place a check next to just those you want to allow.
- **All:** If the style list is way too restrictive, then click All and remove the check next to those you want to disallow.
- **Allow AutoFormat to override formatting restrictions:** If AutoFormat's rules and practices are sufficiently rigorous for your purposes, click to allow this option.

- **Block Theme or Scheme switching:** Choose this option to limit formatting to the currently applied theme or scheme.
- **Block Quick Style Set switching:** Choose this option to use style definitions from the current document and template only.

When you're ready to proceed, click OK in the Formatting Restrictions dialog box. Word next displays the message box shown in Figure 50-13. Click Yes if you want disallowed styles or formatting removed. Note that if any styles are removed, text will be reformatted using Normal (even if the default paragraph style, set in File ➪ Options ➪ Advanced ➪ Editing options, is set to something else).

FIGURE 50-13

If the document contains styles you want to disallow, you can remove them.



When you're ready to proceed, click Yes, Start Enforcing Protection in the Restrict Formatting and Editing pane. Optionally, you can password-protect your formatting restrictions. Even if the level of protection isn't as strong as rights management, it's still better than nothing, assuming the hapless users upon whom you are imposing the restrictions can't be trusted. Sniff. Click OK when you're done.

Note

Other than being an ornery cuss, why would you want to impose formatting restrictions? Some publishing processes depend upon only certain styles being used. There are macros or other programs that process files so that they can be fed into other parts of the publishing process. If other styles are used, the process breaks down and requires manual intervention. Hence, it's better if only the allowed styles are used. In other cases, enterprise-wide formatting standards are strictly imposed to ensure that all documents have a consistent and professional look. Enforcing style restrictions is one way to do that. ■

With formatting restrictions in place, a number of formatting tools, commands, and keystrokes are grayed out as unavailable, as shown in Figure 50-14. Notice that the Change Case "formatting" tool isn't grayed out, however. That's because case is not formatting; it's simply a choice of which characters to use.

FIGURE 50-14

With style formatting restrictions applied, all direct formatting tools are grayed out, and only allowed styles can be applied.



No Changes (Read-Only)

You can protect all or part of a document against changes. You can make different exceptions for different users. Suppose, for example, that you have a document that has been written by a group of people. You want each individual to be able to edit his or her own section, but not that of others. At the same time, you don't want to have to manage different documents.

The solution is to create a document with a specific area for each individual. You make the entire document read-only, but you make an exception for each individual's section so that the individual responsible can make changes as needed.

To set a document as read-only, click Restrict Editing to display the Restrict Formatting and Editing pane. In the Editing restrictions section, click the check box to "Allow only this type of editing in the document," and use the drop-down arrow to set it to No changes (Read only).

To make an exception, select the part of the document to which you want to allow changes by someone (or everyone). This selection can be any part of the document — a single letter, word, sentence, line, paragraph, and so on. If you want the exception to apply to everyone, click the check box next to Everyone. Or, if other groups are listed, you can place a check next to any of them.

To make an exception for individuals, if they are listed, click to place a check by their names. If the individuals aren't listed (or if no individuals are listed at all), click More Users. In Add Users, type the user IDs or e-mail addresses for the individuals you want to exempt from the read-only proscription, as shown in Figure 50-15. When you click OK, Word attempts to verify the names/addresses you added. If they are verified, they are added to the list of individuals.

FIGURE 50-15

You can combine network and Internet e-mail addresses.



Back in the Restrict Formatting and Editing pane, you need to place a check by the name(s) and e-mail address(es) you added, and then click Yes, Start Enforcing Protection. Add and confirm a password if desired, as shown in Figure 50-16, noting that the document is not encrypted and is susceptible to hacking by malicious users. If you enabled User authentication, the top part of the dialog box becomes unavailable, and Word will use Information Rights Management to control the permissions. The document is encrypted, and users are authenticated using Windows Live.

FIGURE 50-16

Choose the degree of protections desired.



Comments

This protection option is identical to the No changes (Read only) type of protection except that all users can insert comments wherever they want to. Refer to the preceding discussion, adding to it that comments are enabled everywhere.

Tracked Changes

Another option is to allow editing, but only tracked changes. That way, you can see who changed what, and when. This is an important feature in controlling the editing/revision process. To protect a document for tracked changes, click Restrict Editing in the Review or Developer ribbon. In the Restrict Formatting and Editing pane, click to enable Editing Restrictions, and set the drop-down type to Tracked Change.

To turn protection on, click Yes, Start Enforcing Protection. The Start Enforcing Protection dialog box appears, where you can set and confirm a password. Note that User authentication is not available for this kind of protection. When you click OK, protection is enabled, and the document switches into Track Changes mode. To turn protection off — which is necessary for accepting/rejecting tracked changes — click Stop Protection. If the Restrict Formatting and Editing pane has long since disappeared, and the time comes to turn protection off, you can toggle it back on using the Protect Document tool in the Review or Developer ribbon.

Filling in Forms

Forms protection is discussed in Chapter 44. In particular, see the section "Forms Protection."

Password to Open/Modify

A final kind of protection is well hidden in Word 2010. It was a bit less hidden in Word 2003 and earlier, although still not overly conspicuous. This legacy feature offers the same weak protection already noted, in that passwords aren't impossibly difficult to hack and crack. The bottom

line: Use this kind of protection at your own risk. It is essentially worthless and offers minimal, if any, protection. Worse, it offers the illusion of protection, and thinking a document is well protected when it's not is perhaps worse than no protection at all, because you are unlikely to be as careful with the document as you would be if you knew it were completely unprotected.

Applying Passwords to Open and/or Modify a Word Document

You can set two different passwords: one that enables a user to open the document, and another that enables the user to make changes. To enable this kind of password protection, choose File ➪ Save As. In the lower-right corner of the Save As dialog box, choose Tools ➪ General Options, to display the General Options dialog box shown in Figure 50-17. Type a password in Password to open, and/or in Password to modify. Both are optional.

FIGURE 50-17

File encryption options are not available when applying Open and Modify passwords to a Word document.



The Read-only recommended option applies only if there is no password for modifying the document. If this option is enabled, the user is provided a read-only recommendation when the file is opened, and an easy way to select read-only.

When you click OK, you are prompted to confirm any passwords and are returned to the Save As dialog box. Click Save to save the document with the password settings.

Note

The Protect Document button is really irrelevant to this dialog box, and serves mostly to let the user know that there are other and better protection options. If you click this button and the Restrict Formatting and Editing pane is not already showing, it is displayed behind the Save As dialog box, and the General Options dialog box goes away. If the Restrict Formatting and Editing pane is *not* already showing, clicking the Protect Document button simply causes the General Options dialog box to close, leaving users scratching their heads. ■

When you try to open the file, you are prompted for the relevant passwords. If you know the password to open but not the password to modify, you can click Read Only to open the document in "read only" mode. Why the quotes? Because it's only the file itself that is read only. The document window can be edited willy-nilly, unlike when using other kinds of protection discussed earlier. If you save the file under a new name, the new file will inherit the password settings, but if you copy the file to the Clipboard and save under a new name, the protection is history.

Comments and Tracked Changes

Comments and tracked changes are two ways Word provides for reviewing others' Word documents. Comments themselves are pretty easy to explain. They are notes, questions, suggestions, and other kibitzing that a reader engages in when reading a Word document. Comments are not integrated into the text as edits. They might suggest edits, and it's not unusual to copy the text of a suggestion from inside a comment and paste it into the text, but comments themselves aren't part of the flow.

Tracked changes, however, are part of the flow. Tracked changes are insertions and deletions made to a Word document. You can see what was inserted or deleted, by whom, and when. That way, if you have multiple edits, you can see which edit was made first. This can help in deciding how to integrate competing edits, as can "by whom" — especially if one "whom" is higher up the food chain than the other.

With comments and tracked changes, as with many Word features, there is the proverbial chicken-and-egg problem. Do you need to learn how to insert tracked changes and comments first, or how to view them first? If starting with viewing seems odd, a little explanation is in order.

If you're already familiar with comments and tracked changes, it doesn't really matter. You'll be reading these sections for nuance — looking for things you didn't already know. If you aren't

familiar with tracking and comments, however, chances are good that your first exposure will come not from wanting to know how to insert them, but from encountering them and wondering how to deal with them. Is this the chicken or the egg? That depends on which comes first . . . .

Comments

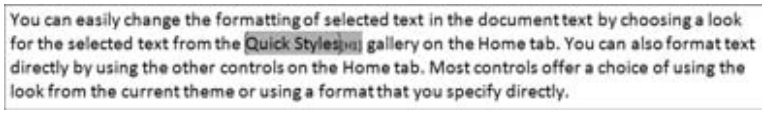
Comments are much like footnotes. In fact, it's not at all unusual to convert comments into footnotes or endnotes. The point is that they are references in the text, but aren't part of the text themselves. Instead, they are like meta text. They comment about the text itself. It would interrupt the flow if comments displayed in line with the text.

Viewing Comments

There are two ways to display comments and tracked changes: in line and as balloons. Comments themselves aren't actually displayed in line, although indicators that a comment is present are. When comments are displayed inline, they are indicated by initials and brackets in the text, as shown in Figure 50-18. When they are displayed in balloons, only the brackets show in line with the text.

FIGURE 50-18

The text of a comment is not displayed in line with text in the document.



Comment text itself displays in one of three ways:

- **ScreenTip, as shown in Figure 50-19:** Comments display as ScreenTips regardless of whether the display is set to inline or balloon. Hover the mouse over the bracketed area to display the ScreenTip.
- **Reviewing pane, as shown in Figure 50-20:** Editing of Comments takes place in the Reviewing pane when the display is set to inline.
- **Balloon, as shown in Figure 50-21:** Editing of comments takes place in the margin when the display is set to balloon.

FIGURE 50-19

Hover the mouse over a comment (inside the brackets) to display the text of the comment as a ScreenTip.

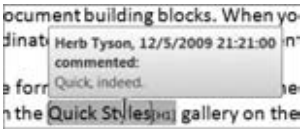


FIGURE 50-20

When the reviewer's initials are inline, right-click them and choose Edit Comment to display the Reviewing pane.

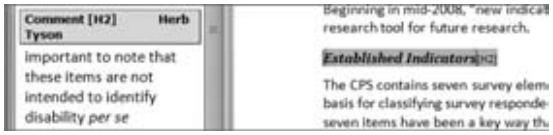
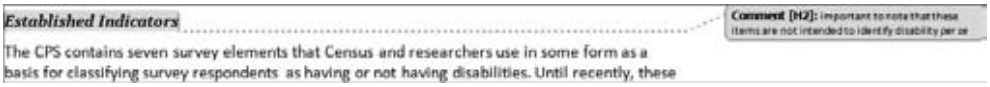


FIGURE 50-21

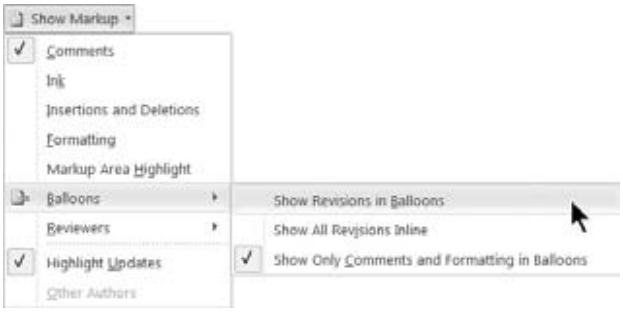
Balloons are displayed and edited in the margin.



To set comments to display as balloons, in the Reviewing ribbon, choose Show Markup ➪ Balloons ➪ Show Revisions in Balloons, as shown in Figure 50-22. Alternatively, choose Show Only Comments and Formatting in Balloons. To set comments to display inline (which isn't really correct, because comments themselves do not display inline), choose Show All Revisions Inline.

FIGURE 50-22

Two of the three Balloons options put comments in balloons.



Inserting, Editing, and Deleting Comments

To insert a new comment, click New Comment in the Comments section of the Review ribbon. If display is set to inline, type the comment in the Reviewing pane. If display is set to balloons, you'll type your comment inside a balloon in the margin of your document. When you're done, you can click in the text to return to normal editing. If you entered the text in the Reviewing pane, you can also click the X or press Alt+Shift+C to close the Reviewing pane.

To edit a comment, right-click the comment (brackets or initials) and choose Edit Comment. As mentioned, where editing takes place depends on whether Show Markup is set to inline or balloons.

To delete a comment, right-click the comment in the text (brackets or initials), and choose Delete Comment. Or, if your wrist needs more exercise, click the comment until Delete becomes available in the Comments section of the Review ribbon, and then click Delete.

Tracked Changes

Unlike comments, tracked changes can be displayed inline. You also have a variety of options regarding which aspects of tracked changes to display.

Track Changes Options

To see the main set of tracking options, choose Track Changes ➪ Change Tracking Options in the Tracking section of the Review ribbon. This displays the considerable Track Changes Options dialog box shown in Figure 50-23. Options are in five groups:

- **Markup:** These control the formatting and colors to use when displaying insertions, deletions, and comments, as well as how to display lines indicating where changes have been made. Default formatting is to use underlining for insertions and strikethrough for deletions. If Color is set to By author, Word automatically chooses different colors for different authors. Note, however, that while your comments might display as green on your computer, they might display as magenta on somebody else's. Therefore, if you're describing a change in a phone conversation, don't assume the other party is seeing exactly what you're seeing.
- **Moves:** These control the formatting and colors to use when displaying text that was moved from one location to another in the document. If you don't want to track moves, remove the check next to Track Moves.
- **Table cell highlighting:** These options control the display of table edits — inserted, deleted, merged, and split cells.
- **Formatting:** These control how formatting changes are represented. If you don't want to track formatting changes, remove the check next to Track Formatting. Note that this doesn't affect the *display* of tracked formatting. It controls whether formatting is tracked at all. When you turn this off, existing tracked formatting changes remain in the document, but subsequent formatting changes are not tracked at all. To hide tracked formatting changes, choose Show Markup in the Tracking section of the Review ribbon tab and remove the check next to Formatting.
- **Balloons:** The balloon settings here correspond to the Balloons settings in the Review ribbon. When set to Never, all of the additional settings in the Balloons section of the Track Changes Options dialog box are grayed as unavailable. When set to Always or Only for comments/formatting, you can set the width of balloons, which margin they appear in, and whether there are lines connecting tracked change balloons with the location of the changes in the text. Use the Paper orientation setting to rotate pages as needed (to landscape) if you want to fit the full text width in addition to showing tracked changes in balloons.

FIGURE 50-23

Use Track Changes Options to change how/if changes are tracked and displayed.



Turn on Tracked Changes

To enable tracked changes, click the Track Changes button in the Review ribbon. Notice that the upper and lower portions of that button are separate. Use the upper portion to toggle tracked changes, and use the lower portion to choose Track Changes, Change Tracking Options, or Change User Name.

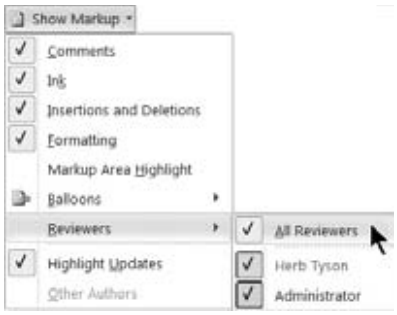
Alternatively, if Track Changes is displayed in the status bar, you can click it to toggle tracking on and off. If Track Changes is not displayed, right-click the status bar and click to place a check next to Track Changes. Once there, click Track Changes to turn tracking on or off. Track Changes can also be toggled using Ctrl+Shift+E.

Show Markup

If your comments don't display, it's possible that they are turned off. In the Review ribbon, click the drop-down arrow next to Show Markup to display the options shown in Figure 50-24.

FIGURE 50-24

Click Show Markup in the Review ribbon to control the kinds of markup that Word displays.



Show Markup options affect only the display of markup. They do not affect whether changes are tracked. Display options are as follows:

- **Comments:** Choose to display or not display comments.
- **Ink:** When using a table or other system that supports pen annotations, use this option to choose whether to display the original ink markup (in addition to the text conversion thereof).
- **Insertions and Deletions:** Use this setting to control the display of textual edits (insertions and deletions). Some users prefer to deal separately with textual and formatting edits. With this option enabled and Formatting display turned off, you can selectively focus.
- **Formatting:** Use this setting to hide or show formatting changes.
- **Markup Area Highlight:** Use this setting to turn shading of the markup area (that is, where balloons display) on or off.
- **Balloons:** Use to control the use of "balloons" for revisions and comments.
- **Reviewers:** Use this setting to selectively show or hide specific reviewers' edits and comments.
- **Highlight Updates:** When co-authoring a document on a SharePoint server, this option highlights updates by the other author(s).
- **Other Authors:** When co-authoring, this option lists other authors currently working on the same document.

Display for Review

Use the Display for Review button to determine exactly what displays when a document contains tracked changes. The Display for Review button displays one of four button faces (shown in Figure 50-25):

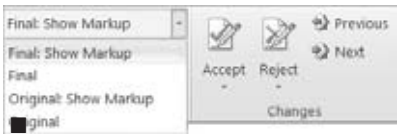
- **Final: Show Markup:** Inserts are shown in context with deletions shown either in balloons or in the Reviewing pane.
- **Final:** All markup is hidden, and you see the document as it would appear if all changes were accepted.
- **Original: Show Markup:** Inserts are shown in balloons or in the Reviewing pane, and deletions are shown in context with strikethrough (or whatever formatting is used to indicate deletion).
- **Original:** All markup is hidden, and you see the document as it appeared before any markup occurred. This is how the document would appear if all changes were rejected.

Tip

It's often hard to gauge the effects of changes. It can be helpful to switch between Final and Original so you can properly assess the full impact of changes, especially when comparing paragraphs that have undergone substantial editing.

FIGURE 50-25

Word can display the document from four different points of view.



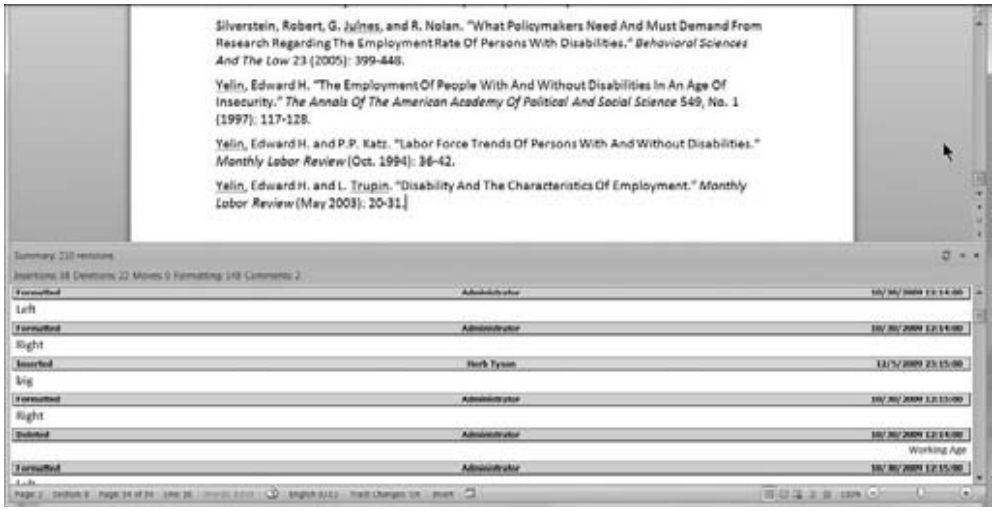
Reviewing Pane

The Reviewing pane is potentially much more substantial than what's shown in Figure 50-20. The Reviewing pane can be displayed vertically, as shown there, or horizontally as shown in Figure 50-26. In the latter, you see a cross-section of the different elements contained in the Reviewing pane.

To toggle the Reviewing pane, click Reviewing Pane in the Review ribbon. To choose between vertical and horizontal display, click the drop-down arrow next to Reviewing Pane, and choose Reviewing Pane Vertical or Horizontal.

FIGURE 50-26

The Reviewing pane shows comments, tracked changes, as well as changes in headers, footers, textboxes, footnotes, and endnotes.



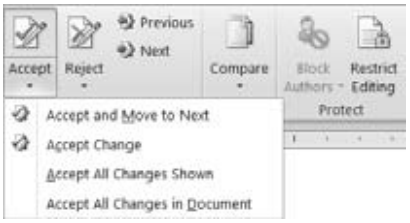
The Reviewing pane is independent of balloons. If you prefer to edit some comments in the balloons and others in the Reviewing pane, the choice is yours. However, choosing one or the other will give you more screen real estate to work with.

Reviewing Comments and Changes

Use the Changes section of the Review ribbon, shown in Figure 50-27, to review changes to determine whether you want to accept or reject them. Use Next or Previous to navigate to the nearest comment or change. Use Accept and Reject to integrate or remove changes. You can also right-click a change and choose Accept or Reject.

FIGURE 50-27

Accept All Changes Shown is available only when some changes are hidden.



Accepting and Rejecting Comments

You cannot accept or reject a comment *per se*. Accepting a comment leaves it alone. Rejecting a comment deletes it.

Accepting and Rejecting Changes

When you accept a change, it is converted from a tracked change into regular text. When you accept a deletion, it is removed entirely from the document.

When you reject an insertion, it is deleted. When you reject a deletion, the original text is restored.

When you accept formatting changes, they are applied to the final version of the text. When you reject formatting changes, the formatting is removed.

Note that the Accept and Reject buttons in the Review ribbon both have upper and lower sections. The lower section of the Accept button features the options shown in Figure 50-27. Reject has similar options. Note that the third option, Accept All Changes Shown, is available only if one or more kinds of changes are hidden in the Show Markup tool.

Protecting Documents for Review

When you send a document to someone, you can protect it so that any changes they make are marked as changes. You can protect it for Tracked Changes or for Comments, but not both at the same time. See the "Comments" and "Tracked Changes" sections earlier in this chapter in the material on document protection.

Summary

In this chapter, you've learned about the many different and potentially confusing kinds of document protection and security available in Word. You should now have a good idea about which forms of protection and security are useful, and which ones give only a false sense of security. You've also learned about tracking changes and commenting on Word documents. You should now be able to do the following:

- Enable Track Changes in a document, and protect that document so that only that kind of editing can be performed
- Use Information Rights Management to set strong protection for Word documents
- Use Word's legacy password protection, while understanding that it's feeble protection at best
- Set options that let you display a variety of different elements when tracking changes in a document

CHAPTER 51

Comparing and Combining Collaborative Documents

This chapter looks at Word's facilities for comparing and combining different versions of the same document. If the document was revised without tracking turned on, you learn how to compare the two different versions. If a document was revised by multiple people, whether or not Track Changes was turned on, you learn how to combine all of the different edits into a single (hopefully manageable) document.

IN THIS CHAPTER

Comparing two documents using "legal blackline"

Combining documents from multiple independent reviewers

Combining documents that contain tracked changes

Combining documents that don't contain tracked changes

Comparing Using Legal Blackline

Word enables you to compare two documents, usually different versions of the same document, using what Microsoft calls *legal blackline*. Basically, you feed Word two documents, designating one as the original document and the other as the revised document. Microsoft then creates a third document (the default setting) with markup indicating the changes. Perhaps not surprisingly, this new document contains tracked changes, and you can use Word's Review ribbon tools to manage the document, to decide what to keep and what to zap. See Chapter 50 for a discussion and description of working with tracked changes.

Note

Legal what? None of the lawyers consulted had ever heard of the phrase "legal blackline." Redlining, yes. Blacklining, no. Maybe it's like "damp-mop," a verb that was conjured by eager marketers in the 1950s when they first started using television commercials to try to create demand for products consumers didn't need. Or maybe it's a phrase used by one lawyer Microsoft consulted, and the developers assumed it was a common expression. Or maybe a competing product called its offering redlining, and Microsoft wanted something distinct. Whatever the case, at this writing, Google has only about 7,000 mentions of that phrase, and almost all of them exclusively in a Microsoft Word context. ■

In a nutshell, suppose that you have two versions of the same document, and the second was accidentally edited without Track Changes turned on. The Compare feature enables you to correct that "oversight" by creating a new document that shows what the original document would look like if the revisions had been made with Track Changes turned on.

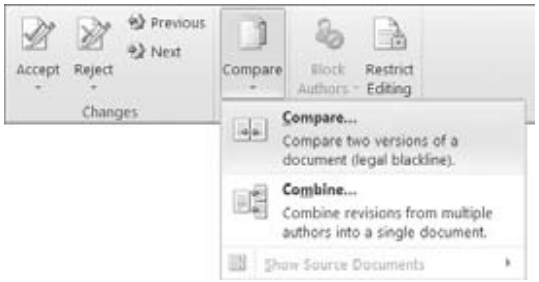
Note

If you have only two documents you want to compare, and neither displays tracked changes, use the Compare feature. If you have two or more documents that contain tracked changes, and you need to keep track of who changed what and when, use the Combine feature, described later in this chapter. ■

To initiate the comparison, in the Review ribbon, click Compare ➪ Compare, as shown in Figure 51-1.

FIGURE 51-1

Click Compare to compare two documents that don't already contain tracked changes.



Word displays the Compare dialog box. Click the More>> button to display the full Compare Documents dialog box shown in Figure 51-2. When you first click the More button, you see the default settings for Compare. By default, all of the Comparison settings are enabled: Show changes at is set to Word level, and Show changes in is set to New document. Use the Original and Revised document drop-down arrows to choose the documents you want to compare. If the documents you seek aren't in the alphabetical list of recent files shown, choose Browse, either in the list or by clicking the Browse button to the right of the drop-down list.

Under the Revised document field, Label changes with is set to the current default user name (from Word's Popular Options). You can change that to whatever you like — it doesn't even have to be a user's name.

Under Comparison settings, choose the elements you want included in the comparison. By default, they all are selected. Under Show changes, you can choose to compare character by character or word by word. Choose Character level if you want to see the exact edits that were performed. For example, if the original document has "word" and the revised document has "world," in which the "l" was inserted, then the Word level setting would simply show you that "word" was replaced by "world," whereas Character level would show the fact that an "l" was inserted.

Note

The Insertions and deletions item is always grayed out and always checked. This is by design. When you use Compare or Combine, Insertions and deletions will always be compared. Microsoft left this in because it might not be obvious. Hence, it displays as always checked, and it cannot be changed. ■

FIGURE 51-2

By default, the result of the comparison is placed into a new document.



As noted, by default, Compare puts the changes into a new document. However, if it suits your purposes better, you can route the changes into the document designated as either the Original or the Revised. Note that if you've now changed your mind about which is which, you can click the Swap Documents tool.

When you're ready to make the comparison, click OK. If either of the two documents being compared contains tracked changes, for purposes of the comparison, Word will assume that the changes are accepted, as shown in Figure 51-3. If you set Show changes in to New document, neither the original nor the revised document is actually changed. If you set Show changes in to Original or Revised, again nothing is actually changed unless you choose to save the comparison result.

FIGURE 51-3

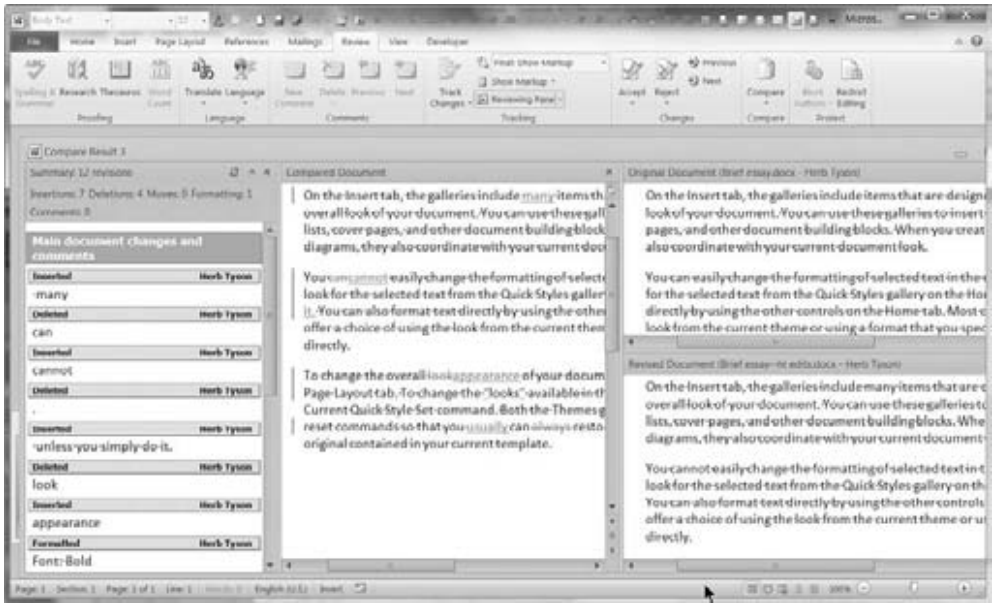
Though Word assumes that the changes have been accepted, the source documents aren't actually changed — not yet, at least.



When you click OK to start the comparison, Word arranges the Compared Document (the Show changes in document), the Original, and the Revised into a document window, along with the Reviewing pane, as shown in Figure 51-4. If you chose the New Document option, notice that the tentative title is Compare Result #. If you chose to show the results in either the Original or Revised documents, the central document will be either the original or the revised document, depending on what you chose.

FIGURE 51-4

Word tries to show you exactly what editing has taken place.



In this view, notice that the three document windows scroll at the same time. The idea is to show the original, revised, and resulting edits at the same time. Depending on screen size as well as how large the Word window is, this can be difficult. However, Word makes a valiant effort.

Use the Review tools, as shown in Chapter 50, to set the view as needed, and to move to the Next or Previous changes, accepting or rejecting changes as you see fit. When you're done, if you want to save the compared result, choose File ➪ Save As (or Save, but read the following Warning first). If this is a Compare Results # window, you'll be prompted whether to keep that name.

Caution

Before you click Save, keep in mind that if you chose Original or Revised as the document in which to show changes, saving now will replace the corresponding document with the compared version. Once done, there's no going back. If you think you'll have a need for all three versions of the document, choose Save As, and give the compare results version a new name. ■

Protection

You cannot compare two documents if either of them is protected for tracked changes. When you try, Word will advise you that it can't "merge" the documents due to document protection. In fact, any kind of document protection will produce the objection shown in Figure 51-5. If you see this message, unprotect the documents you are trying to compare and try again, assuming you have the necessary permissions to unprotect the documents.

FIGURE 51-5

You can't compare two documents if either of them has protection enabled.

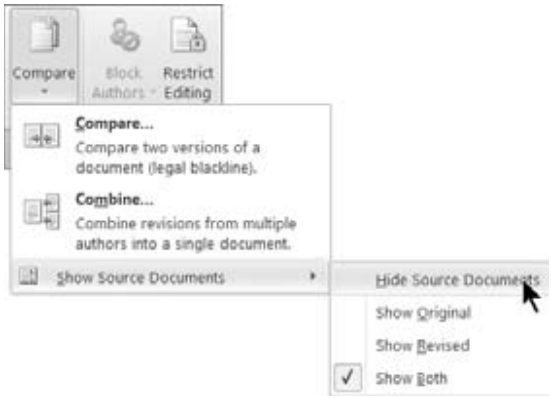


Gaining More Screen Real Estate

If you find that the default view offered by the Compare feature doesn't give you enough room to maneuver, you can selectively display (or not) the Original and Revised documents. In the Compare group in the Review ribbon, click Show Source Documents to reveal the controls shown in Figure 51-6. You can also close the Original and Revised documents by clicking the Xs. If you change your mind, click Show Source Documents and click the option you want.

FIGURE 51-6

To create more display and editing room, you can selectively hide the original and revised versions of the document.



Combining Documents That Contain Tracked Changes

When you have multiple documents containing tracked changes and you need to keep track of who changed what (and when), use the Combine command to merge the tracked changes two at a time until all of the different reviewers' changes have been incorporated into one document. Alternatively, lock the different reviewers in a room and let them fight it out. Though some of us might be tempted by the latter, one suspects that it's not a good recipe for job security, so let's give this Combine feature a try before pricing dueling pistols.

As with the Compare command, documents are combined two at a time. If any document in the paired combinations is protected, you cannot continue. Before you invest a lot of time doing comparisons, make sure that you can actually use the documents you're planning to compare.

Combining Multiple Documents Containing Changes

When combining or merging changes from multiple documents, it really doesn't matter if the changes have been tracked. At the end of the process, changes attributable to any given reviewer will be tracked due to the way the documents are combined.

Note

The only loss for untracked changes is that you won't know exactly when the changes were made. For example, if a reviewer was making changes at 4:00 a.m., you won't know that. Depending on the reviewer, that could matter a lot, affecting how seriously you consider such sleep-deprived comments. ■

Suppose, for example, that document A is the original document written by Herb Tyson, and that document B has changes that were made by John Smith — some of them tracked and some of them not. When you combine document A and document B, everything that is different in document B will be attributed to John Smith, whether tracked or not. Consider Figure 51-7. At the right, in the Revised Document, "untracked change" wasn't tracked. Yet, in the Reviewing pane it shows up as a change by John Smith, no different from "a tracked change," which was tracked.

When you combine documents, you have the same options you have when you compare them, in terms of where the combined changes go. It works best if you always combine changes into the same document, preferably the original to which the other changes were applied. Suppose that you start with document A and give it to four reviewers. Each of them takes a whack at it at the same time, so you end up with four different revisions to document A. Let's call those revisions Bob, Carol, Ted, and Alice. There is no temporal sequence, and it doesn't matter when each is compared with the original, A.

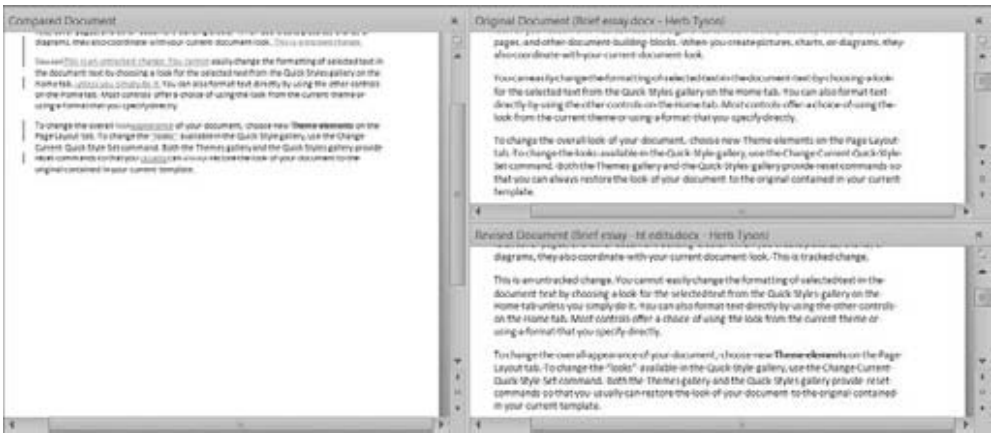
One way to proceed is as follows (keeping in mind that the order for combining with Bob, Carol, Ted, and Alice doesn't matter):

- Compare A with Bob's version, putting the results in A. Save A.
- Compare A with Carol's version, putting the results in A. Save A.

- Compare A with Ted's version, putting the results in A. Save A.
- Compare A with Alice's version, putting the results in A.

FIGURE 51-7

Both tracked and untracked changes end up tracked in the combined document.



At the end of the process, A will contain tracked changes from each of the four reviewers. It won't necessarily be easy to sort out, but all of the changes *will* be in a single document.

Note

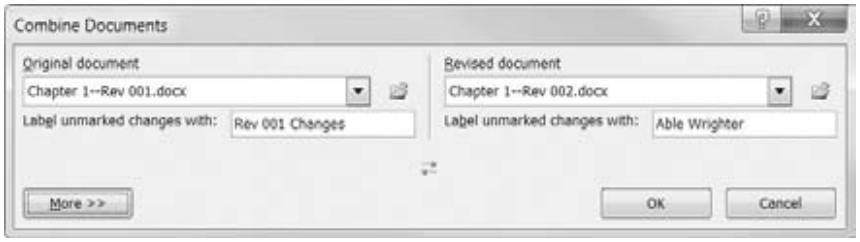
An alternative way to proceed is to insert an additional step before saving A. You could, depending on the nature of the edits, resolve each set of edits one at a time. First, examine Bob's changes and accept or reject each. Then, use the resolved version of A for the next comparison, and continue in this fashion. This might seem less cluttered and confusing, but there is a logical problem. By the time you get around to Alice, her changes might be moot if the text she revised was deleted by Carol. Ultimately, you'll need to decide which method works best, although most users find it least confusing when they can see all of the suggestions at once. At the end of the day, however, most Word users conclude that simultaneous editing by four reviewers is a nightmare that should be avoided. Sequential edits are a lot easier to manage. ■

Running the Combine Documents Command

To kick off the process, in the Review ribbon, choose Compare ➪ Combine. Set Original document to the earliest version you have, and set Revised document to a revised version of the original. Notice that the Combine Documents dialog box shown in Figure 51-8 is essentially identical to the Compare Document dialog box shown in Figure 51-2. Choose the desired options and set Show changes in to Original document (but make a backup copy of the original before you combine the documents). Click OK to combine that set.

FIGURE 51-8

When comparing an original to multiple revisions, recycle the Combined document as the ''original'' for each successive comparison.



Note

Before you begin, be aware that Word cannot retain multiple formatting revisions. Therefore, after each Combine step, if you are including formatting in the Comparison settings you enable, you should set Show Markup (in the Review ribbon) to just Formatting, and use Next/Previous/Accept/Reject to resolve all of the formatting changes before proceeding to the next Combine. ■

After the Combined Document appears, resolve any formatting changes and then repeat the process for the next revision. Continue until each of the revised versions has been combined. Finally, you'll have a version that contains all of the changes, as well as the reviewers' names. If the originals contain tracked changes, you'll also have the times the changes were made. For untracked changes in the revised versions, the revision time will be the time that the combine operation occurred for that revision and hence won't be meaningful.

Summary

In this chapter you've learned how to compare and combine documents.

You should now be able to:

- Compare two documents that contain no tracked changes, automatically marking up one so you can review the changes
- Combine an original document with independently revised versions to create a version that contains tracking
- Control what kinds of differences get tracked when comparing two documents (moves, comments, formatting, etc.)

CHAPTER 52

SharePoint and SkyDrive

SharePoint Server is a program that helps businesses share access to files and information in a variety of ways. In essence, SharePoint is a special kind of website that provides controlled access to folders, documents, contact information, scheduling, and other resources related to documents and workflow management.

SharePoint works as a server that can be installed on your own company's computers. A server is a computer or computer program that provides services to client programs. Servers usually are connected to a network — such as the Internet or a local area network (LAN) — and are available to respond to client applications, such as your web browser, Microsoft Outlook, and even Microsoft Word. For example, websites are located on servers, and they respond to your browser requests to display information. When you send or receive e-mail, different kinds of server programs are used to deliver e-mail between you and your correspondents.

If you or your company doesn't have its own servers connected to the Internet, you can purchase SharePoint hosting services, just as you can purchase a hosting plan for other websites and services. Increasingly, the same companies that provide ordinary web hosting are also offering SharePoint hosting, sometimes bundled into hosting plans as cheap as $10 per month or lower. You can discover such plans by searching for "sharepoint hosting" online.

Word 2010 has features that are designed to work with SharePoint Server 2010. You can access these features directly, using the Share command from the File menu, or you can access them indirectly by saving a file to a SharePoint Server or by opening a file that resides on SharePoint Server. All you need is a SharePoint server and a user account.

IN THIS CHAPTER

Creating a SharePoint document workspace from Word

Publishing documents to a SharePoint server

Checking documents out from a SharePoint server

Creating and reviewing workflow tasks from Word

Adding new files and folders to a SharePoint document workspace

What Happened to Workspace Management?

All the workspace management features that were accessible in Office 2007 have been moved to SharePoint Workspace 2010. SharePoint Workspace takes on the triple role of providing workspace management for SharePoint and Groove as well as facilitating the creation of shared folders. See Chapter 53 for additional information.

If you're using a pre-2010 version of SharePoint Server, the enhanced collaboration features for Word 2010, such as co-authoring, are not supported. As of this writing, it remains to be seen whether co-authoring will be supported by Windows Live SkyDrive, which is replacing Office Live Workspace.

Accessing Your SharePoint Server

Accessing a SharePoint server from Word can be as easy as opening a file. First you'll need the URL (Internet address), your user name, and a password. Choose File ➪ Open, type or paste the SharePoint URL into the File name box and press enter. Yes, we know it's not a file. This is a shortcut method for navigating to a location. Or, rather than use the File name box, click in the location field at the top of the Open dialog box, replace the current location with the SharePoint server's URL, and press enter.

Note

If you are connected to SharePoint 2010 you will have additional options not available to users of earlier versions of SharePoint. Even aside from server version differences, installation options and feature implementation vary considerably, so you might see more or fewer features than others using different installations of the same server version. As the saying goes, "Consult your server administrator for information about accessing and using your SharePoint server." ■

Assuming you typed the URL correctly, you're next prompted for a user name and password, as shown in Figure 52-1.

Type your user name and password. Note that a SharePoint user name format typically calls for a site/domain name in all uppercase letters, a backslash, and your user name, unless you are located on the same network as the server. Accessing the server from a different location on the Internet will require the more complex login (i.e., which includes the site/domain name, rather than just the user name), except when using VPN or remote desktop puts you onto the same network as the SharePoint server.

Type your password, click "Remember my credentials" if you like (unless your employer requires otherwise), and click OK. This opens the SharePoint site, which might look similar to Figure 52-2, depending on your site's settings. SharePoint sites usually are organized into one or more libraries and document workspaces. A library is a collection of resources on a SharePoint site. Don't worry if your SharePoint site doesn't look like this one. Different organizations format sites differently, and appearances can vary wildly. A document workspace is a location on a SharePoint site that enables you to coordinate work on one or more documents with other team members.

FIGURE 52-1

If you're the only user of your computer and not otherwise concerned about security, you can save time if you click ''Remember my credentials.''

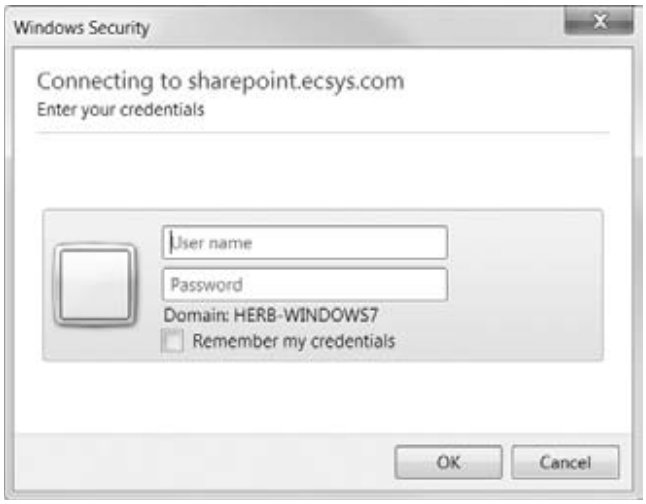


FIGURE 52-2

Access documents using a SharePoint library.



Tip

Once you've navigated to your SharePoint library, you can drag the top SharePoint folder/library link from the location box (the address bar at the top of the file window) into the Favorites list. This can save you navigation and typing time in the future. Click in the Location box to select the address. Click on the folder icon at the left, then drag it down and drop it onto Favorites. The SharePoint link will now appear in your Favorites list. Note that you can drag subfolders to the Favorites area as well. ■

A document workspace provides a number of tools and facilities to share files, make updates available to team members, establish workflow by creating and managing tasks, and provide information about the status of documents and tasks. Unlike in Office 2007, many of those features no longer are found in Word, Excel, PowerPoint, and other main applications. Instead, those facilities are now accessible via either your web browser or SharePoint Workspace.

There are other ways to log on to your SharePoint server. Once you have checked out a document from the library, anytime you open a local copy of that file, Word attempts to log you on to the server to check for updates, etc. Using the URL, however, is a surefire direct route, especially when you're just getting started.

Note

With SharePoint you can either work from the file that is stored in the document workspace or work on a local copy. When you choose the latter route, you are notified of changes to the workspace copy, and you can choose when and whether to publish your changes. This approach can be a bit tedious because you often have to compare your changes to those of others so you can integrate and coordinate changes. As a result, it's usually ultimately more efficient if work on a given document is done sequentially, rather than simultaneously. Nonetheless, if you choose the local route, choose File ➪ Options ➪ Advanced. In the Save section, enable the option "Copy remotely stored files onto your computer and update the remote file when saving." ■

Using Office 2010 with SharePoint 2010

If you were accustomed to working with SharePoint in Word 2007, you will notice some dramatic differences. The most important difference is that the document-management features have been removed from Word. You will now find those features in SharePoint Workspace 2010. If you need to create a local copy of a document workspace, that is no longer done from Word. You now perform that operation from SharePoint Workspace or from a web browser.

Is this an improvement? That's up to you. It certainly uncomplicates Word. But it does mean that you might need to install and learn to use an entirely new application. Well, not entirely new, if you used Groove. SharePoint Workspace bears a strong resemblance to Groove Client from Office 2007. Still, if you've never used it, it will be new to you. See Chapter 53 for a quick introduction to it. Or stick with a web browser if you want something much more familiar.

Using Save to SharePoint from Backstage

You can initiate access to SharePoint resources by choosing File ➪ Save & Send ➪ Save to SharePoint, as shown in Figure 52-3. If you've previously navigated to shared online locations, they will be shown under Recent Locations. Otherwise, choose Browse for a location, which opens the Save As dialog box, shown in Figure 52-4.

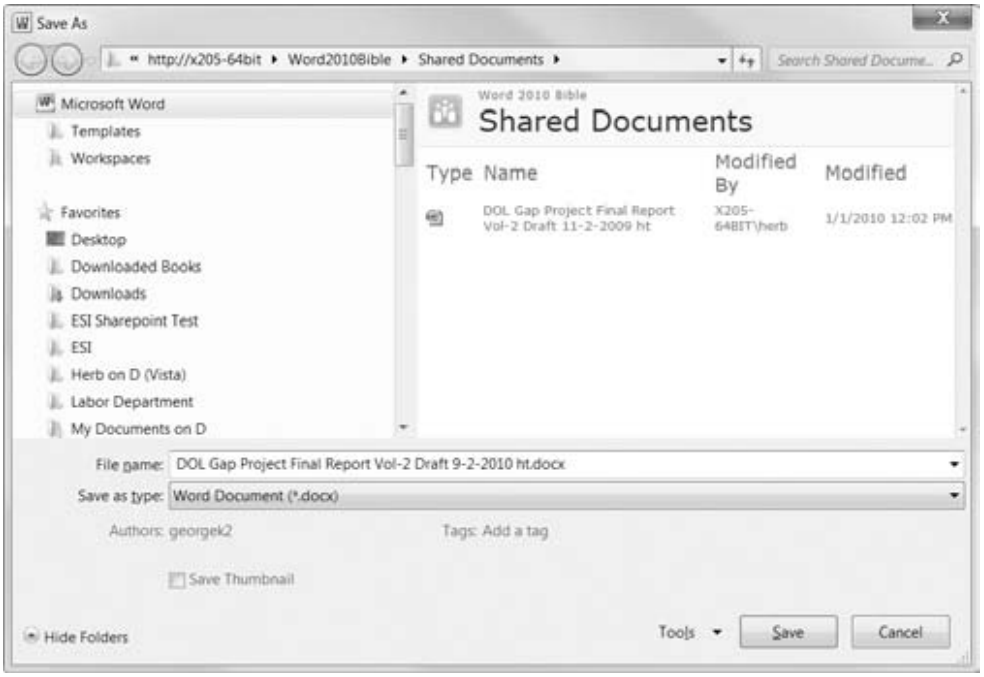
FIGURE 52-3

Use File ➪ Save & Send ➪ Save to SharePoint to save the current file to the document-management server (SharePoint site).



FIGURE 52-4

The Save As dialog box can be used to navigate to online storage locations.



Note

Although the selected Save & Send tab is called Save to SharePoint, the recent locations displayed there are not necessarily all SharePoint locations. SkyDrive locations will also be listed here, as will other online locations. Note also that when you access a particular online site for the first time, Word might notify you that the site is not in your trusted locations. If you do indeed trust the site, copy the URL to the clipboard, and then choose File ➪ Options ➪ Trust Center ➪ Trust Center Settings ➪ Trusted Locations ➪ "Add new location." Paste the URL into the Path textbox, enable the Subfolders option (if appropriate), type a description, and click OK ➪ OK ➪ OK. This setting might not take effect until you close all Office 2010 applications. ■

Type or paste the URL for the SharePoint site into the location field at the top of the Save As dialog box. Depending on the speed of your connection, Internet latency, and the speed of the server's connection, it may take a while for the location to appear. Once it does, type the name of the file and click Save. For the balance of the session, while that document is opened, each time you save it, it will be saved to the server.

Co-Authoring

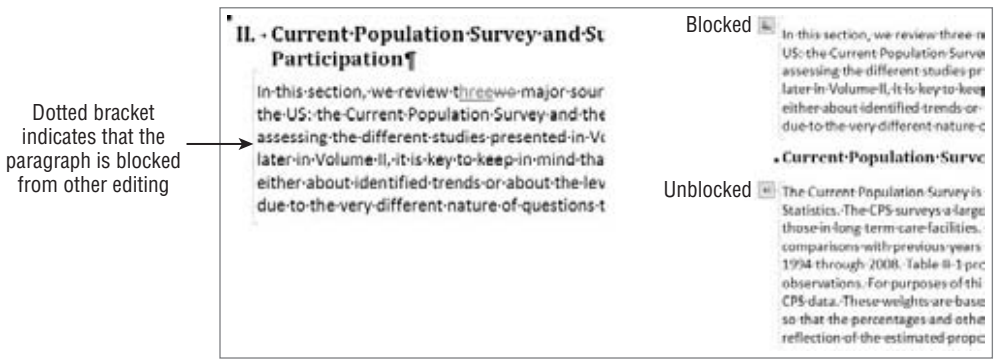
New to Word 2010 is something called co-authoring. Using SharePoint 2010 resources, multiple users can open and edit the same document at the same time, with different authors working on different parts at the same time. When you save your changes, not only are your changes saved to the copy of the file on the server, but Word retrieves saved changes from other authors at the same time. Each time others save their changes, they will also receive the most recent changes saved by you.

Blocking and Locking

So, with all this saving going on, what happens when two authors are working on the same paragraph at the same time? It can't happen. That's because the moment you begin to edit a paragraph — by making any change — that paragraph is automatically locked from other authors, as shown in Figure 52-5. The dotted light blue left bracket shows that I am working on the current paragraph. The bracket would appear even if Track Changes were not being used.

FIGURE 52-5

Co-authoring indicators show which paragraphs currently are being edited.



In addition to automatic locking, you can preemptively lock out other authors from parts of a document you want to reserve. You might do this, for example, if you want material within a given document heading, subheading, etc. to not be subject to other editing until you're done with it. This can be especially useful if you're editing a table or chart and expect those edits to have ripple effects in one or more parts of the document text that are linked to the table or chart.

To block other authors from editing part of a document, select the part you want to reserve, and choose Block Authors in the Developer ribbon tab. Or right-click the selection and choose Block Authors. To release a blocked section, right-click the blocked part, and choose Block Authors to toggle blocking off.

Note that the icon next to the paragraph changes, but does not go away, as shown in Figure 52-5. This serves as a notice that changes might have been made to that paragraph. The icon and brackets do not go away until the document is saved to the server.

Co-Authoring Indicators

When a document is being edited by multiple authors, the Number of Authors Editing item in the status bar tells you how many. Note that this item does not become active unless at least two people currently are editing the document. To enable this indicator, right-click the status bar, and place a check next to Number of Authors Editing, as shown in Figure 52-6.

FIGURE 52-6

Enable the Number of Authors Editing indicator to display the number of authors on the status bar.



When multiple authors are editing, a multi-editing indicator appears as shown in Figure 52-7. Click the indicator to see who is editing.

FIGURE 52-7

Click the Number of Authors Editing indicator to see who else is editing the current document.



Save to Web (SkyDrive)

Windows Live SkyDrive is a relatively new service that replaces Office Live Workspace. SkyDrive provides up to 25 GB of free online storage space, accessed through your Windows Live Credentials. Files and folders can be shared, and co-authoring is supported. The down side, unfortunately, is that the maximum file size is 50MB, which limit the uses for which you can employ SkyDrive. You won't find SkyDrive mentioned by name in Word's user interface. If you already have a SkyDrive account set up, to get there in Word, you'll choose File ➪ Save & Send ➪ Save to Web. If you don't already have a SkyDrive account, then continue reading.

Creating a SkyDrive Account

Creating a SkyDrive account requires a Windows Live ID. To obtain one, use an Internet browser and go to `http://home.live.com/`. Click Sign Up, fill in the required information (noting that you can either create a `live.com` or `hotmail.com` e-mail address or click the "Or use your own e-mail address" link.

Once you have a Windows Live ID, you're ready to roll. Click the Sign In button and provide your Windows Live ID credentials (complete e-mail address and password) in the dialog box shown in Figure 52-8.

The first time you log in in this way, Windows Live accesses your free 25 GB online storage account. By default there are two top-level folders: Public and My Documents, both shown in Figure 52-9. Use Public for documents, pictures, and other files that you want to share with anybody who has a Windows Live ID. Use My Documents for more secure online storage. Use encryption and Digital Rights Management permissions for even more secure storage, or consider renting a safe-deposit box.

FIGURE 52-8

When logging into Windows Live, use your e-mail address rather than your display name.

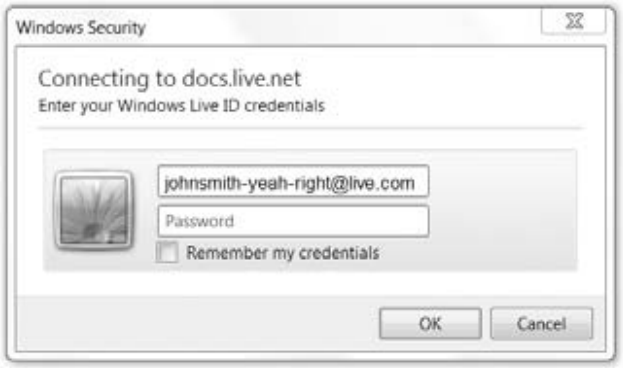
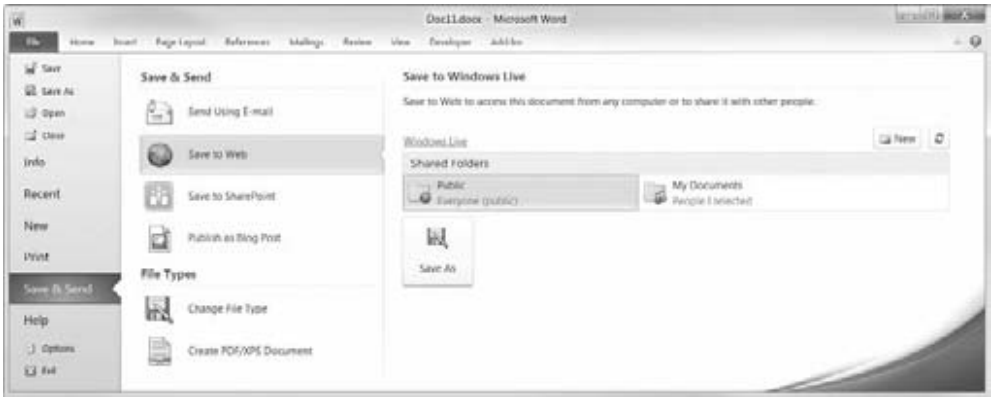


FIGURE 52-9

The Windows Live link and New button open a browser. Stick with Public, My Documents, and Save As to stay within Word.



Caution

Is SkyDrive safe and secure? I don't know. While I have no qualms about putting vacation photos or test documents there for temporary storage, I would not put anything proprietary or personal there. It might be more secure than my own hard drive — or not. I just don't know. It's new, and being a neophobe, I don't trust anything that's new. If I absolutely needed to store something more sensitive there, I would use permissions and encryption. ■

Accessing SkyDrive Documents

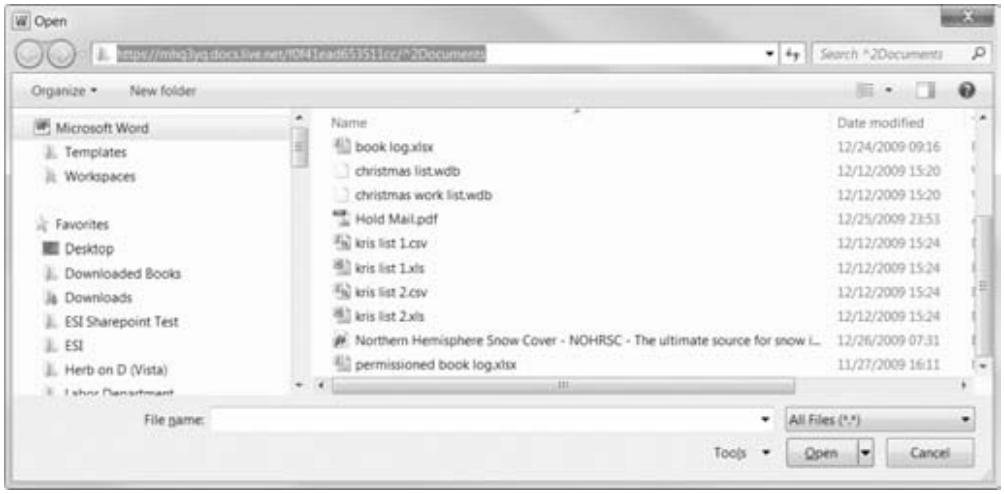
When you come to SkyDrive for the first time, it's useful to create some infrastructure for when you later return. Note the New button in Figure 52-9. It opens your web browser, and from there you can enter a name for the folder and the desired "Share with:" settings (Everyone, My Network, Just Me, or Select people). Easier perhaps, however, is to double-click either Public or My Documents, which will display a Windows Explorer-based file dialog box within Word. Here you can right-click in a blank area and choose New Folder to create a new folder. The name "New folder" is highlighted (the system has pressed F2 for you, which is the shortcut for renaming a file or folder). Type a name for the folder and press Enter.

Adding a SkyDrive Shortcut to Your Favorites List

Even more useful than creating new folders, however, is putting down some breadcrumbs so you can find your way back easily. After you double-click Public or My Documents (or click Save As), Word displays the Save As dialog box, and the current location is now the SkyDrive location. Dismiss the Save As dialog box and press Ctrl+O (or choose File ➪ Open). Then click in the location field near the top of the dialog box, as shown in Figure 52-10.

FIGURE 52-10

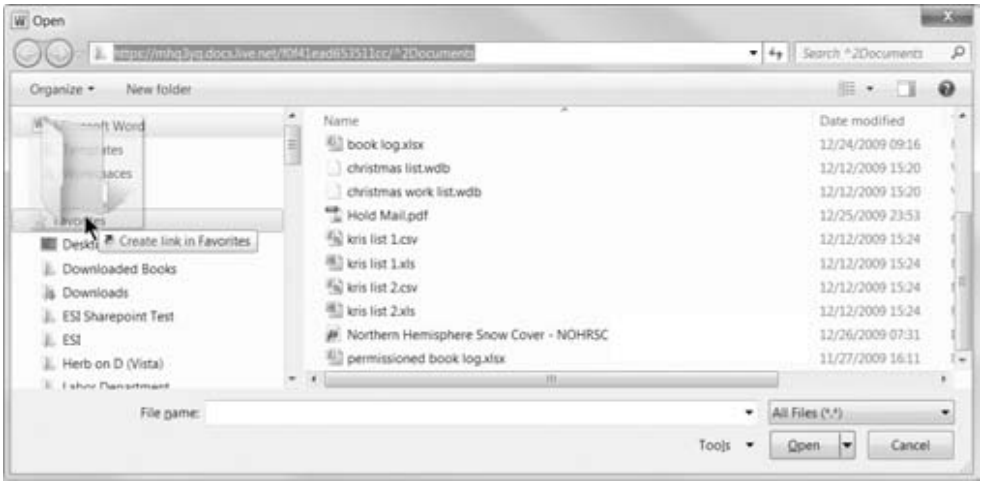
For easy return, drag SkyDrive folder locations into the Favorites list.



Click and hold the mouse over the folder icon at the left end of the SkyDrive URL, and drag it down into the Favorites area, as shown in Figure 52-11. Release the mouse button when the tooltip says "Create link in Favorites." (If the tooltip says something else, you might be dropping the shortcut into an existing folder instead.) If the resulting Favorites shortcut name is not suitably obvious, right-click it and choose Rename. I find it useful to prepend "SkyDrive" to such shortcuts. If you like, you can create multiple shortcuts to different SkyDrive folders.

FIGURE 52-11

Release the mouse button when the tooltip says ''Create link in Favorites.''



From now on, to access existing SkyDrive folders and documents, use the Favorites links in any dialog box based on Windows Explorer. Those links are available in all Office 2010 applications, as well as in Windows Explorer itself.

Note

As of this writing, Microsoft says that SkyDrive will support co-authoring for Office 2010 documents. It does not provide such support at the current time. When and if it does, refer to the earlier sections in this chapter on co-authoring in SharePoint to see how to use collaborative features. ■

Summary

In this chapter you've seen how SharePoint integrates with Word 2010 — sort of. You've learned how to initiate contact with a SharePoint site, save files to the SharePoint server, and open them. You've also seen how co-authoring allows you to work with other authors to avoid having to work with multiple versions of the same document. You've also seen how to access 25 GB of free online storage using Windows Live SkyDrive and your Windows Live ID. You should now be able to do the following:

- Save a document to your SharePoint site
- Check out (open) a document from a SharePoint site
- Block other authors from editing parts of a document you need to reserve
- Find out who else is editing the current document
- Set up a SkyDrive online storage account
- Save and retrieve files stored on SkyDrive

CHAPTER 53

SharePoint Workspace

The SharePoint Workspace 2010 application is collaborative software that provides local access to documents stored or shared using SharePoint, Groove, and Shared Folders. SharePoint Workspace replaces the Groove client from Office 2007. To a certain extent it also replaces SharePoint Workspace and document-management functions that were built into previous versions of Word, Excel, and PowerPoint. It provides a third sharing mechanism, Shared Folders (called File Sharing in Groove 2007), which allows you to share folders among your own computers as well as with friends and colleagues.

Just when you thought integration was king, features integrated into Office get farmed out to another client application altogether. Rather than dwelling on that, let's just dive in and start using SharePoint Workspace. Please note that this book is called *The Word 2010 Bible* — not *The SharePoint Workspace 2010 Bible*. For that reason, I cover only the basics dealing with gaining access to documents — enough to whet your appetite, perhaps, or maybe just enough so you can determine whether the SharePoint Workspace client application has anything to offer you. For the calendar, discussions, and other features, consult the Help file or a detailed book about SharePoint Workspace 2010.

First, some definitions are in order. To begin with, let's distinguish between a *Microsoft SharePoint Workspace 2010 client* (the application) and a *SharePoint Workspace*, which is a copy of all or part of a SharePoint site's content — which can include documents, a calendar (which, while enticing, is not actually supported by SharePoint Workspace), links, and other shared assets.

Yes, this overlapping and redundant terminology is confusing, but it's useful for understanding this chapter. Besides, confusing and redundant naming is a Microsoft tradition, as veteran Word users will attest if you mention the word *normal* to them.

IN THIS CHAPTER

Groove versus SharePoint

SharePoint Workspace 2010 basics

Creating and deleting accounts

Creating and deleting workspaces

Sending workspace invitations

Working with workspace documents

To try for some clarity, I will use *SPW 2010* to refer to the client software, and I will refer to the local storage area as a *SharePoint Workspace*.

A SharePoint Workspace is logically parallel to a Groove Workspace. Both kinds of workspaces can be created with SPW 2010. SPW 2010 can also be used to share folders without the overhead of SharePoint or Groove, i.e., if all you need is access to files and folders with no need for any kind of coordination or control.

What's a *workspace*? A workspace is a set of (hopefully related) folders and files. Typically, a workspace contains a set of folders and files for working on a particular project or task. It might contain data, Word documents, Excel worksheets/spreadsheets, PowerPoint documents, resource documents, links, and any other assets you need to complete your part of a project or task.

You would typically use a SharePoint Workspace to carve out a portion of a SharePoint site to which you need access wherever you are. Typically, this would allow you to use that material even when you are not connected to a SharePoint server or the Internet, as well as to access several other SharePoint tools, such as announcements, links, tasks, and team discussion. You might also prefer to use a SharePoint Workspace when access to the server is slow, rather than waiting each time you need to access a document from the server. Then, when content changes — either on the server or on your own computer — you can synchronize your personal SharePoint Workspace with the SharePoint server.

You would typically use a Groove Workspace to duplicate and synchronize a set of working files and documents between two or more computers and/or users. This allows you, for example, to coordinate and synchronize files and other content you need for a project (whether for work, home, or whatever) between your home desktop computer and a laptop you use while traveling, at the library, etc.

For business users who do not have access to SharePoint, Groove Workspace can provide a substitute for some of the convenience of using a SharePoint server. While a Groove Workspace does not provide for co-authoring, it does let multiple users coordinate their work by automatically synchronizing content as it changes. Hence, if you're working on the Chapter 7 file and someone else is working on the Chapter 8 file, when each of you saves changes to his or her own copy of the respective file, the other person's copy will automatically be updated on a regular schedule or when you explicitly choose to synchronize. Synchronization is handled automatically by SPW 2010.

In this chapter you'll learn how to use SharePoint Workspace 2010 (SPW 2010) to create SharePoint and Groove Workspaces, as well as shared folders. While it won't come anywhere close to exhausting SharePoint Workspace's full range of features, if you've never before touched this new application, this chapter will give you a basic sense of how to use it, and what it can do for you, a Word user.

Who Needs SharePoint Workspace 2010?

If you never collaborate or share documents with anybody — not even with yourself between two or more computers that you control — proceed to Chapter 54, which basically tells you how to collaborate with yourself while using different Office 2010 applications.

SPW 2010 is for people who need to coordinate information that is stored and used on different computers — and for this discussion, "different computers" can refer to different partitions on the same computer when multiple copies of the same files need to be maintained.

If you do not know or care what SharePoint is and do not work in an environment that uses a SharePoint server to facilitate collaboration, then please feel free to concentrate on the sections of this chapter dealing with Groove Workspaces and Shared Folders. No sense fretting over features you don't have.

On the other hand, if you frequently find yourself having to reconcile edits — tracked and otherwise — in multiple versions of the same document being edited by different people, you might want to go back and peruse Chapter 52. The collaborative benefits of co-authoring can put an end to a lot of frustration, and SharePoint might be a worthwhile investment for you or your employer.

Groove versus SharePoint

Does a Groove Workspace replace a SharePoint Workspace? In a word, no. If you need the collaborative and server facilities of SharePoint, a Groove Workspace is not a substitute. Groove Workspace does not provide the following:

- A local copy of SharePoint-based assets
- Check-in and checkout of documents (when preferred) so that multiple people can't edit at cross-purposes
- Co-authoring of the same document in real time, when taking complete ownership of a document isn't necessary or when co-authoring makes the work go more quickly and smoothly
- Server storage of shared resources and documents
- An enterprise-wide server location for managing a team project

Note

Some of these same needs — such as server-based storage of folders and other resources and co-authoring — might be met by SkyDrive. SharePoint provides greater control and more space, but could be overkill if your needs are met by SkyDrive, which is free (at least for now). ■

Conversely, is SharePoint really what you need? Suppose for example that you — an individual user, and not part of a team — want to be able to edit a project's files from multiple locations, such as your work computer, your home computer, and your notebook computer. In addition, suppose some or all of those computers are sometimes offline. A Groove Workspace enables you to do the following:

- Automatically (or on demand) synchronize a shared workspace in multiple locations when you are connected to the Internet
- Work on documents even when you aren't connected to the Internet, and then synchronize the next time you're connected

- Share a workspace with multiple peers who aren't on your work network or in the same Windows workgroup
- Share multiple workspaces with multiple peers, including yourself (no need to pretend you're someone else) when you're using a different computer

For some users it's not a choice between the two. SharePoint serves some needs best, and a Groove Workspace serves other needs best. There are times, in fact, when SharePoint and Groove can work together. But when SharePoint isn't an option or when you have to choose between the two, Groove often comes out ahead in calculations centered on cost, convenience, and functionality — especially for small groups and especially if you yourself are a small group.

Using the SharePoint Workspace 2010 Client

In order to use SPW 2010 you need an account. The first time you start SPW 2010 you are prompted to either create an account or to restore an existing account. (To create a new account later, right-click the SPW 2010 icon in the system tray and choose New Account.) I'm going to assume you want to create an account. Click Next, type your name and e-mail address, and click Finish. (If you have an Account Configuration Code you probably aren't reading this chapter, and if you are, you need to speak with your IT manager.)

Tip

Don't use the same name when creating multiple SPW 2010 accounts for yourself. Your name is used to identify the accounts. If you use the same name each time you won't be able to tell which name is which account. Instead, include something about the e-mail address (if you're using different e-mail addresses) or about the computer you're using. ■

Note

Accounts are *not* tied to Windows Live IDs. The e-mail address you provide here has nothing to do with Windows Live. Your e-mail address is simply one way that other SPW 2010 members can contact you. ■

Deleting an Account

Deleting an account can be a little confusing because of the way information is presented. To delete an account, right-click the SPW 2010 icon on the system tray, click the account name you want to delete, and then click Launchbar. In the Launchbar window, choose File ➪ Options ➪ General ➪ Preferences button ➪ Account tab. The lower part of the Account tab panel displays the name of your computer — not your SPW 2010 account name. That notwithstanding, this is the place to delete the account. It will not delete your computer name.

Caution

Deleting an account will delete any Standard workspaces you have created and all data and files they contain (see "Workspaces," below). Back up anything you need to save before deleting an account. ■

Once you've backed up everything you need to save, under Delete Account from this computer, click Delete. Notice the admonitions about what deleting does, and then click Yes to confirm the deletion. SPW 2010 deletes the account, leaving any other accounts you have untouched. Click OK to complete this mindless wanton destruction.

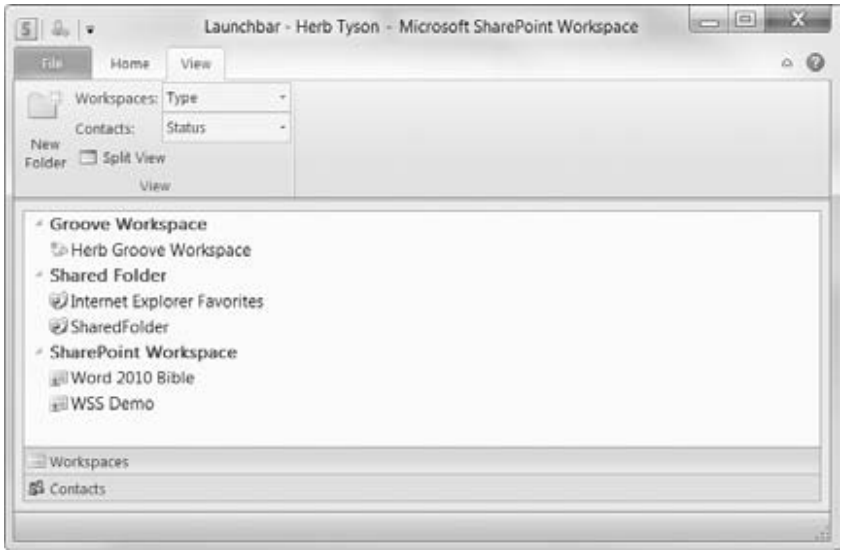
The SPW 2010 Interface

There are two main SPW 2010 windows: the *Launchbar* and the *Workspace window*. When you install SPW 2010, a SPW 2010 icon is added to the Windows notification area (also known as the system tray). To open SPW 2010, right-click the SPW 2010 icon and click Launchbar. If you have multiple accounts you will first need to click the account you wish to use.

The Launchbar, shown in Figure 53-1, by default is displayed in Workspace Folders view. Here it's displayed in Workspaces Type view, which you can select by choosing View and setting Workspaces to Type. This lets you see that there are three types of workspaces currently set up: Groove Workspace, SharePoint Workspace, and Shared Folder (the latter isn't a workspace per se).

FIGURE 53-1

Use the Launchbar to access your Workspaces and Contacts lists.



Use the Launchbar to create new workspaces, change workspace properties, control alerts, issue invitations, and add and remove contacts, among other things.

To display a Workspace window, right-click the SPW 2010 icon in the system tray and choose Open Workspace. (Again, if you have multiple accounts, you will first need to click the desired

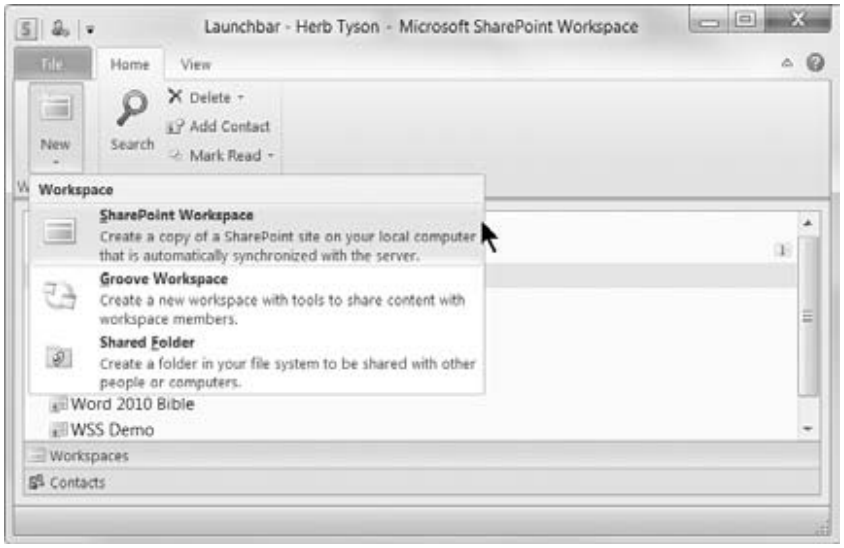
account.) In Select Workspace, click the workspace you want to open and then click OK. You will learn more about workspaces in "Workspaces," later in this chapter. The Workspace window enables you to do many of the same things as the Launchbar.

SharePoint Workspaces

To create a SharePoint Workspace, display the Launchbar, and, in the Home tab, choose New ➪ SharePoint Workspace, as shown in Figure 53-2.

FIGURE 53-2

The Launchbar lets you create SharePoint and Groove Workspaces as well as Shared Folders.



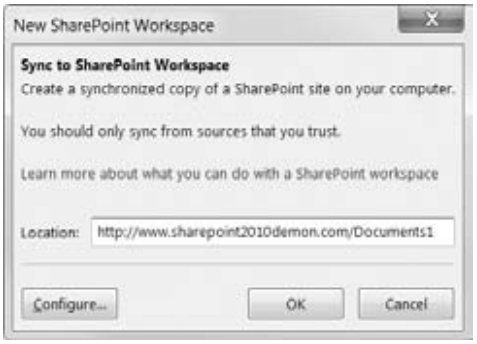
In the Location field, shown in Figure 53-3, type the complete URL for the top-level SharePoint folder you want to copy — which isn't necessarily the basic URL — and then click Configure rather than OK.

Why? There are two "why" questions. First, "Why the top-level folder rather than just the basic URL?" Good question!

The basic URL refers to the entire SharePoint site. You usually will not want the entire site because it's often a lot more than you need. Even if you're a pack rat like me and like having as much data as possible, sites sometimes contain hundreds of gigabytes of data — often more than your own HD capacity. Synchronizing that much information is very time- and bandwidth-consuming. It's much better to narrow it down just to what you're likely to need. If you need more, you can select it later on.

FIGURE 53-3

Specify the Location URL as narrowly as possible to save yourself work downstream.



The second question is "Why click Configure rather than OK?" Good question. This gives you an opportunity to narrow down or expand your request if the initial URL wasn't precise or inclusive enough.

So click Configure. You will next be prompted for your user ID and password. If the SharePoint site is not on the same network as you, your ID will probably be in the form DOMAIN/user. Provide the information requested, choose to remember your password, if desired, and press enter.

In the Configure Settings dialog box, shown in Figure 53-4, notice the Content field, which for most items says No Content, and only for Documents says All Content. That's because I specified the Document folder rather than the entire site. This particular site contains dozens of libraries — some with tens of thousands of huge files. To synchronize that much content could take several days, even at 25 Mbps. Worse, different libraries sometimes have their own separate passworded access. When synchronizing for the first time (even assuming you choose the Remember Password option), you might be prompted for your credentials dozens of times. Once *is* enough.

If desired, change the Content setting to All Content or Headers Only for any additional folders that strike your fancy. Click OK when you're ready. SPW 2010 now opens the SharePoint Workspace window, as shown in Figure 53-5. At the left, if Content is checked, you will see the types of content available via SharePoint Workspace (Documents, Lists, and Discussions (Fig.53-5)). Under Available on Server you see assets that are not available using SharePoint Workspace, including Calendar.

The available tools you see in the workspace window will depend, among other things, upon the implementation of this particular server. Tools and implementation vary so widely that I could not hope to cover them in this brief introductory chapter. As the saying goes, if you have questions, consult your site administrator.

To open a SharePoint Workspace later, right-click the SPW 2010 icon in Windows' notification area, and choose Open Workspace. Click the desired target, and then click OK.

FIGURE 53-4

Being selective means faster synchronization and not being overburdened by too much local storage.

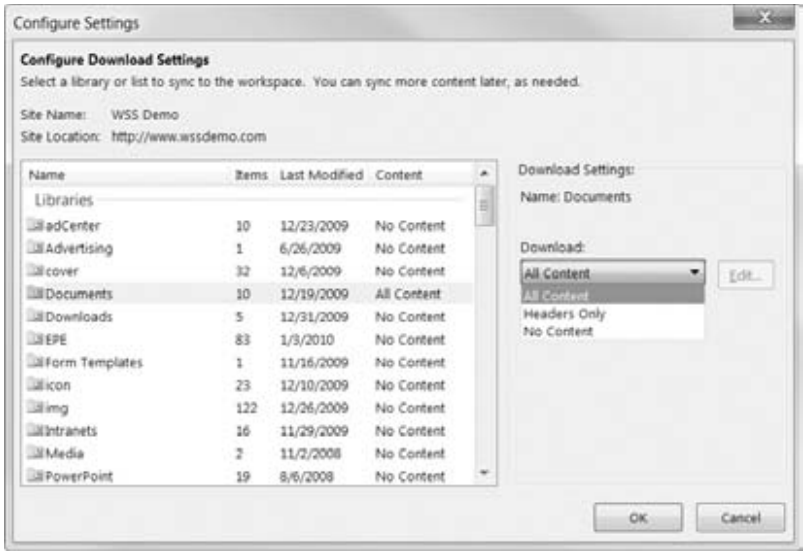
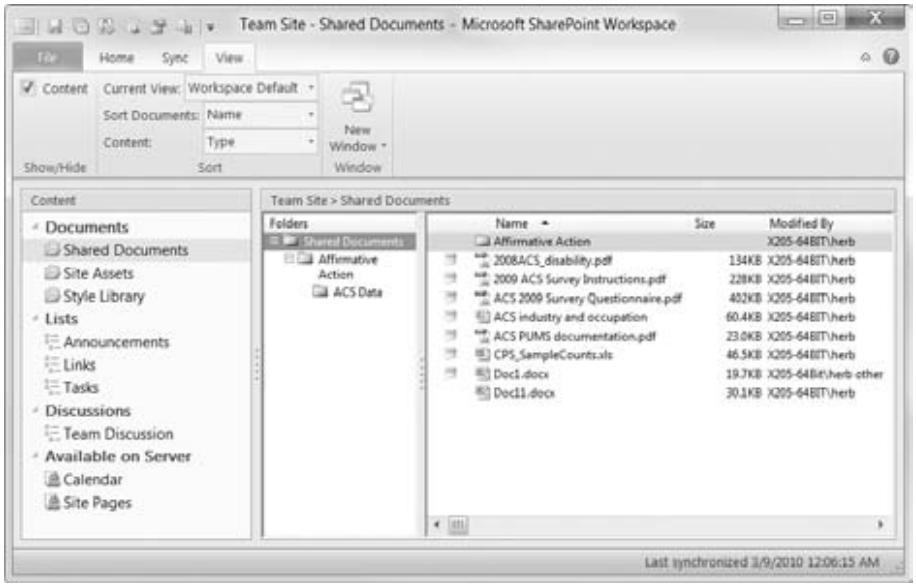


FIGURE 53-5

A SharePoint Workspace window will vary depending upon your SharePoint Server implementation.



Deleting a SharePoint Workspace

When your need to maintain a local copy of SharePoint resources goes away, delete the copy. This will, among other things, reduce your own computer's need to synchronize your copy with the server's. This reduces bandwidth and overhead. This will also eliminate space on your own hard drive where your copy of the SharePoint workspace resides.

To delete a SharePoint Workspace, click on it in the Launchbar and tap the delete key. Click Yes to confirm your desire to delete. Note that deleting the workspace does not have any effect on the SharePoint site itself or your access to it through a web browser. Also, should the need arise, you can always carve out a new SharePoint Workspace anytime you want — now that you know how.

Groove Workspaces

Unlike SharePoint, Groove does not provide shared or completely coordinated access to the same files. Instead, when computers are sharing a workspace, each computer has its own local copy of the files in the workspace. This might seem redundant, but what it lacks in storage thriftiness it makes up for in convenience. Moreover, for some of us, redundancy is a benefit, as long as the required storage is not excessive.

Note

If you are working in an enterprise you might have access to additional facilities through Groove Server or SharePoint Server. Because implementation can vary substantially, it would be impossible for this chapter to accurately or adequately describe how you interact with the environment created by your IT department. Instead, this section focuses on the individual user's Groove Workspace experience, and aspects common to all users of the SPW 2010 client application with respect to Groove Workspace. ■

Workspaces

To create a Groove Workspace, in the Launchbar Home tab, choose New ➪ Groove Workspace. In the New Groove Workspace dialog box, type a name for the workspace, and click Create. (The Options button lets you choose 2010 or 2007 — it defaults to 2010).

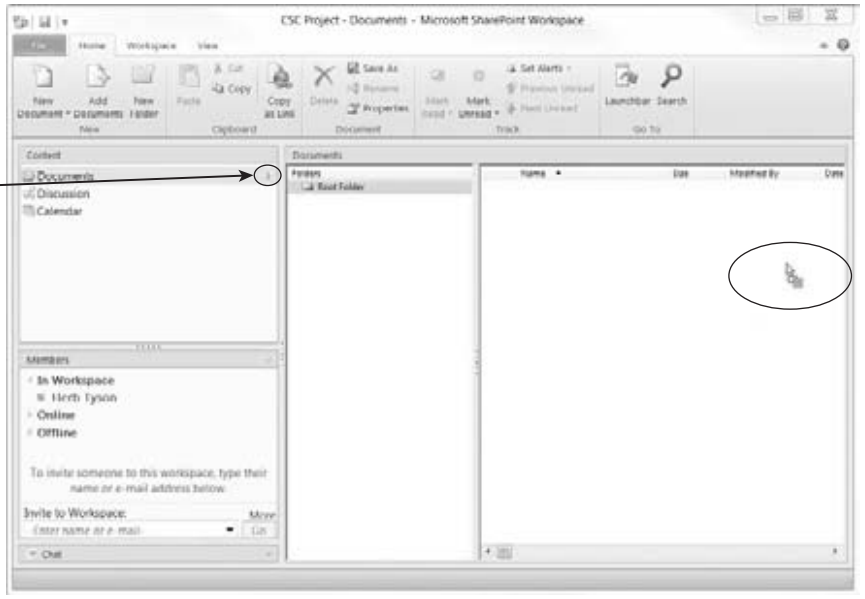
A Groove Workspace contains three kinds of tools by default: Documents, Discussion, and Calendar, as shown in Figure 53-6. Right-click the blank area in the Content section and choose Add New Tool to see a list of additional kinds of content you can add to the workspace. Note that the numeral 1 you see in a rounded green rectangle indicates that one user is active in the displayed workspace.

Adding Documents and Folders to a Groove Workspace

There are several ways to add documents and folders to a Groove Workspace. The most natural way is by dragging and dropping. Note that when you drag items into a Groove Workspace, you are not moving the files — you are copying them. The mouse pointer will gain a + sign to show that you are copying rather than moving.

FIGURE 53-6

A Groove Workspace can contain a number of different kinds of tools or content.



Note

When you make changes to files in the workspace, only those copies are changed (and eventually any workspaces that are shared). If I copy files from `C:\Consulting\CSS` to my Groove Workspace, the original files in `C:\Consulting\CSS` remain untouched. If I want my own files to be updated, I need to drag files from the workspace back into `C:\Consulting\CSS`.

Note also that if you use Windows Explorer to search your hard drive for the files that reside in a Groove Workspace, you will not find them. That's because Groove Workspace does not store them as files. Instead they are stored in a database, and Windows Explorer does not know how to search SPW 2010's database. ■

Because files and folders you copy to a Groove Workspace are not tied in any way to the original files, if you delete the files in the workspace the original files are not touched. This should reinforce for you, however, the idea that if you want any changes stored in "normal" file format, you will need to drag or otherwise copy them to the desired folder on your hard drive — outside of SPW 2010.

Deleting Workspaces

To delete a Groove Workspace from your computer, select the workspace in the Launchbar and press the delete key, or click Delete in the Home ribbon tab (or right-click and click Delete).

To delete all copies of that workspace from all your computers (i.e., all computers using your current SPW 2010 account), click the Delete tool's drop-down arrow and choose Delete from All Computers. This does not delete copies of the workspace that reside on *other* user accounts (i.e., for other members). To delete all copies of the Groove Workspace *everywhere*, choose Delete for All Members.

Caution

Make regular filesystem copies of anything you want saved before deleting a Groove Workspace. Once you delete a Groove Workspace, the delete cannot be undone. As long as the workspace still exists on any computer, however, you can recreate it. So, if there are no unsynchronized changes that resided only in your copy, you can effectively undo the delete, even though there is no Undo command. However, once you have deleted every copy of a Groove Workspace, it cannot be undone, period (unless you have a backup copy of the folder structure where Groove Workspace keeps its database). Windows Explorer's own Undo command, however, will not do you any good in any of these situations. ■

Sending Workspace Invitations

To be of any real use, workspaces need to be used from different computers. One way to do that is to invite others, even if it's just yourself.

You can invite someone to use a Groove Workspace either from the Launchbar or from a workspace's Workspace tab. To invite another user, in the Launchbar, click to select the workspace, and choose one of the Invite ... options shown in Figure 53-7. If you choose Invite to Workspace and the user isn't currently available, the invitation is sent by e-mail, so this option is generally most efficient for inviting other people.

In the To field, type the name or e-mail address of the contact. Set Role to Manager, Participant, or Guest. Consult the Help system to see precisely how each is defined by default, and how to change the levels of access granted to each for a particular workspace.

In the space provided, type a message. If the invitation will go by e-mail, you can decide what level of information and detail the invitee needs, based on your assessment of his familiarity with Groove Workspaces.

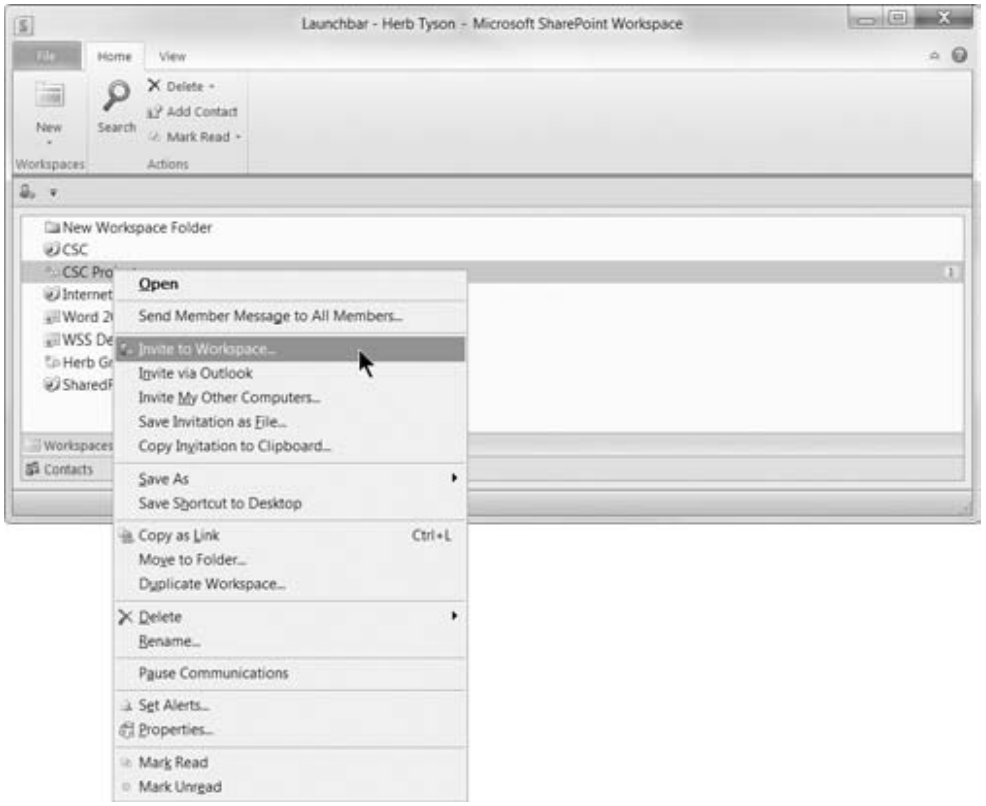
If you choose Invite My Other Computers, the workspace is automatically shared with your other computers where your current account is being used. Computers to which you've copied your Groove account information will automatically receive the shared folder information.

Canceling Pending Invitations

To cancel a membership open the Groove Workspace. In the Members panel, select the member you want to uninvite, and click Uninvite Member in the Workspace tab. To cancel all pending invitations click Cancel All Invitations, also in the Workspace tab. You cannot cancel a pending individual invitation.

FIGURE 53-7

There are several ways to invite someone to a Groove Workspace.



Accepting Workspace Invitations

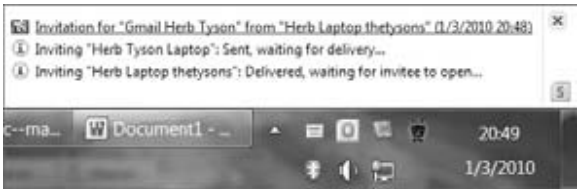
You can receive a workspace invitation in either of two ways. If you are online and logged into Groove, the invitation shows up as a pop-up (or a pop-down, because it appears by the system tray), as shown in Figure 53-8. If the invitation disappears before you can get to it, hover the mouse over the SPW 2010 icon in the system tray to make the message reappear. Click the invitation link.

In Respond to Invitation, click Accept or Decline, as you wish, or Close to defer a decision. If you click Reply and send a reply, that is in effect a verbose acceptance.

If you're not logged into your SPW 2010 account, the invitation will arrive as an e-mail. The e-mail will contain a link for you to click to accept the invitation.

FIGURE 53-8

If you are logged into your SPW 2010 account, invitation links appear near the system tray notification area.



Caution

For some reason, the e-mail invitations sent by Groove sometimes contain broken links. Because of the way the lines are wrapped, part of the link can occur on a successive line, and fail to be included as part of the link. When that happens, copy the orphaned portion to the clipboard and then click the non-orphaned portion. When your browser appears, press escape to stop it from loading the broken link. Paste the orphaned portion at the end of the URL shown, to complete it, and then press enter to load the link. ■

Working with Groovy Documents

As noted previously, Groove Workspace does not have facilities for version control or managing editing by multiple users at the same time. It does, however, check before saving changed files to the workspace. When you're working from a Groove Workspace, if there are changes, SPW 2010 alerts you to that fact, and asks if you want to save the changes to the Groove Workspace.

If the new version conflicts with an existing version — i.e., changes from another user who is logged into the same workspace — SPW 2010 alerts you to the conflict. You can then use either the Compare or Combine commands described in Chapter 51 to resolve the different changes.

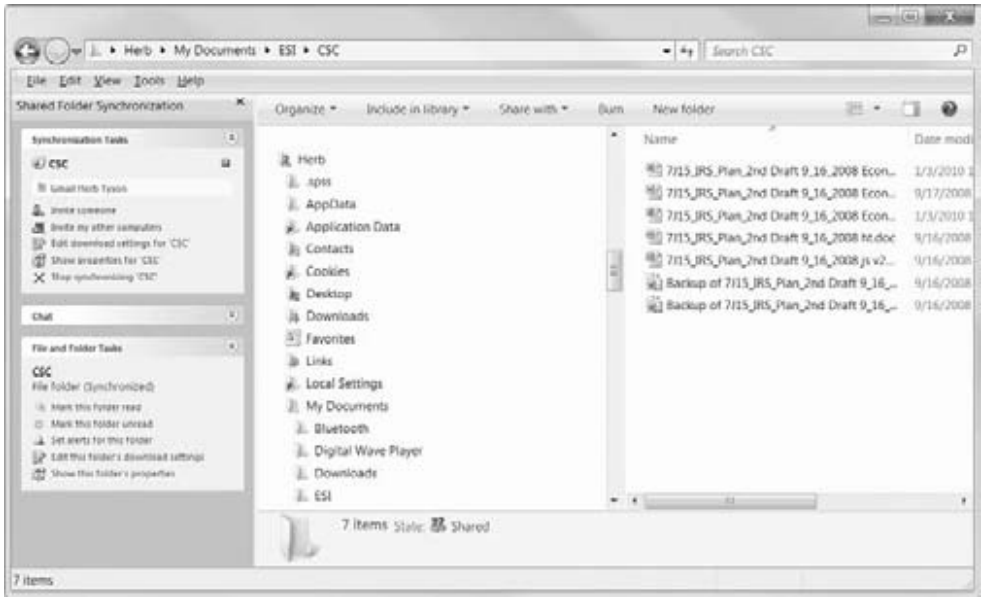
Shared Folders

The third kind of workspace, Share Folders, is not displayed in a SPW 2010 window. Instead, it is displayed in a Windows Explorer window, with the Shared Folder Synchronization panel at the left, as shown in Figure 53-9.

If you turn the Synchronization panel off (by clicking the X in the upper right corner), you can turn it back on for any folder — not just folders that have already been shared. If Windows Explorer's menu is not already displayed, choose Organize ➪ Layout ➪ Menu bar. In the menu, choose View ➪ Explorer Bar ➪ Groove Folder Synchronization to redisplay the Shared Folder Synchronization panel. Or, for folders that have already been shared with SPW 2010, simply double-click the shared folder in the Launchbar.

FIGURE 53-9

SPW 2010 uses Windows Explorer to display shared folders.



Once a folder has been shared you can use the Shared Folder Synchronization panel controls to invite people or your other computer to share the folder. This is extremely intuitive, so you should peruse the options shown in the panel.

Caution

Unlike with a SharePoint Workspace or a Groove Workspace, when you're using a Share Folder, SPW 2010 provides no file coordination. Because you're working on a local copy of each file, it is quite possible to edit that file at cross-purposes with someone else. This can lead to confusion when multiple users are editing the same file. If you are not averse to using a cloud-based server, you might consider using SkyDrive for such editing — assuming that SharePoint is not an option. When you share a folder on SkyDrive, co-authoring controls are available in Word 2010, making editing at cross-purposes less likely. ■

Deleting a Shared Folder

When you delete a Shared Folder workspace using SPW 2010, you aren't deleting the actual folder. Instead, you're simply telling SPW 2010 to stop synchronizing and sharing it. To do this, in the Launchbar, right-click the folder and choose Delete ➪ From This Computer or For All Members. If you choose the former, you're only un-sharing the folder on your own computer. If you choose the latter, you're un-sharing for all members. In neither case, however, are any actual files deleted. All that is removed is the association with SPW 2010. The folder accepts its gold watch and goes home.

Summary

In this chapter you've been introduced to SPW 2010. You now know how to create a SPW 2010 account, how to create and delete workspaces, and how to share a Groove Workspace and folders. You should now be able to do the following:

- Use SPW 2010 to copy all or part of a SharePoint site to your computer for use offline
- Use a Groove Workspace to synchronize files on different computers you own
- Use a Groove Workspace to synchronize work performed by a project team, without using SharePoint
- Send Groove Workspace and Shared Folder invitations to contacts
- Use the Shared Folder Synchronization panel in Windows Explorer to work with Shared Folders

CHAPTER 54

Integration with Other Office Applications

In some ways, using Office 2010 is like using a single multi-purpose program. Things mesh together almost seamlessly. For example, when you insert a chart into a Word 2010 document, the process starts Excel 2010, almost as if Excel were an extension of Word.

While integration is now better than ever for many things you do in Office 2010, there are times when you really wonder if the left hand knows what the right hand is doing. For example, when copying cells from an Excel spreadsheet into a Word table, you might wonder why the default action would be Nest Table (which might, for example, paste a 10×10 selection into a single Word table cell).

In this chapter, you explore the ways in which Excel, PowerPoint, and Outlook communicate with Word. Some things are perfectly intuitive, and others aren't. The casual PowerPoint user might never stumble on how to send outlines back and forth with Word. Do you ever wonder about the array of different picture options when copying images between Word and other programs? Which format should you use, and what are the consequences of using this one or that? How can pasting a 40K picture into a Word file add 900K to its size? In this chapter, the focus is on the less intuitive, to get you over some hurdles and stumbling blocks, and to make sense of some of those little mysteries that can make using Word seem like a struggle.

IN THIS CHAPTER

- Sending data between Excel and Word
- Copying tables between Excel and Word
- Exchanging outlines with PowerPoint presentations
- Using the Outlook Address Book in Word

Excel

Although sharing work between Word and Excel often works well, differences in how the two programs operate can produce confusing results. This can be addressed by becoming aware of those differences, and working in a way that accommodates them and smoothes the way. This section looks at Word and Excel and ways to share text, data, tables, and graphics.

Using Excel Content in Word

Word offers a variety of different ways to share and exchange content with Excel:

- **Clipboard:** Copying content to the Clipboard, and then using Paste or Paste Special to insert the contents into Word or Excel. Commandment: When in doubt, use Paste Special.
- **Chart:** Using Office 2010's Chart feature to create a chart inside Word using Excel's facilities
- **Object:** Using Insert ➪ Object ➪ Object ➪ Create New or Create from File to embed all or part of an Excel worksheet into a Word document
- **File:** Using Insert ➪ Object ➪ Text from File to insert content from an Excel worksheet into a Word file

A common method that does not work, however, is drag and drop. You cannot select data or other content in Excel and drag it into Word. Attempting to drag a selection in Excel simply expands the selection. The reverse does work, however — dragging from Word into Excel — as you'll see shortly.

Clipboard

Excel's Clipboard works differently from the Clipboard in most other Office programs. Why? Nobody seems to know for certain, although theories abound. The best theory is that Excel is cell-based, requiring a different working mode. If you're not an Excel veteran, however, it's likely to bother you. When you select cells in an Excel worksheet, they are highlighted as shown in Figure 54-1. At this point, they are merely highlighted, and cannot be moved or otherwise acted upon. You also need to copy (or cut) the selection to the Clipboard, by pressing Ctrl+C, right-clicking, and choosing Copy, and so on.

FIGURE 54-1

To move cells in Excel, it's not enough to select them; you have to copy them to the Clipboard.

	A	B	C	D	E
1	Year	Employed % of Working Age (Non-Disabled)	Employed % of Labor Force (Non-Disabled)	Employed % of Working Age (Disabled)	Employed % of Labor Force (Disabled)
2	1994	93%	84%	74%	24%
3	1995	94%	86%	75%	24%
4	1996	94%	87%	75%	25%

Selected cells

	A	B	C	D	E
1	Year	Employed % of Working Age (Non-Disabled)	Employed % of Labor Force (Non-Disabled)	Employed % of Working Age (Disabled)	Employed % of Labor Force (Disabled)
2	1994	93%	84%	74%	24%
3	1995	94%	86%	75%	24%
4	1996	94%	87%	75%	25%

Cells copied to Clipboard and ready to be acted upon

Even after you've copied the selection to the Clipboard, the Excel selection needs to remain highlighted as shown (surrounded by a dashed outline). If you press Esc in Excel or double-click

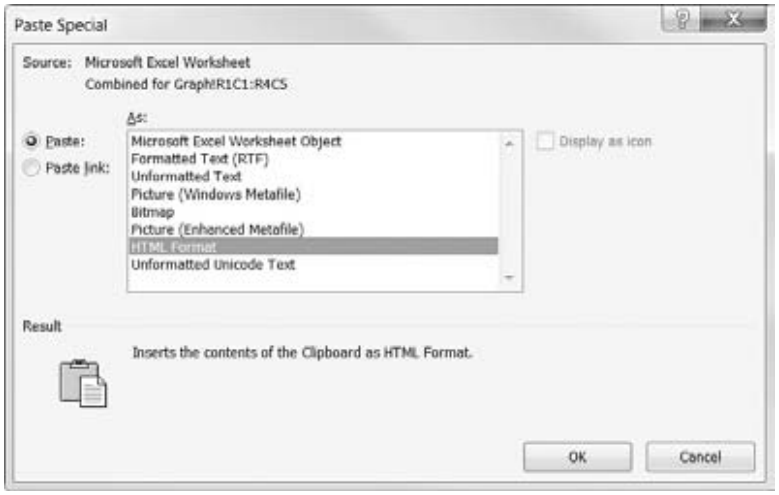
elsewhere (or perform any of a dozen or more other actions in Excel), the Paste button dies. Even if the data has actually been copied to the Clipboard, you still can't use the Paste button unless the selection is still active in Excel. More to the point, the Paste Special feature is no longer available, and Paste Special often is the best way to deal with Excel data.

When the selection has been disturbed, and if the Clipboard was set up to automatically collect data, you can use the Clipboard pane itself to paste the selection into Word. However, the Paste Special options aren't available. The Office Clipboard develops a terrible case of amnesia about Excel's data unless the selection is still active. Therefore, don't get distracted in the middle of trying to copy data from Excel to Word.

With the selection active in Excel, click where you want the data to appear in Word, click the Paste button's drop-down arrow, and choose Paste Special (or press Ctrl+Alt+V). The Paste Special dialog box, shown in Figure 54-2, appears. Notice that the default is HTML format. Why is that the case, rather than Formatted Text (RTF), and does it make any difference?

FIGURE 54-2

When pasting a selection of cells from Excel into Word, you'll often have as many as eight options regarding how to paste.



Nothing special was done in Excel to format the cells, so there's no compelling reason that HTML would have been chosen. That's simply the default. At the end of the day, both HTML and RTF retain both formatting and table structure, but there are differences. They might seem subtle, or they might seem substantial, depending on your needs. There also are differences among other options that might seemingly appear similar. Different Paste Special options are as follows:

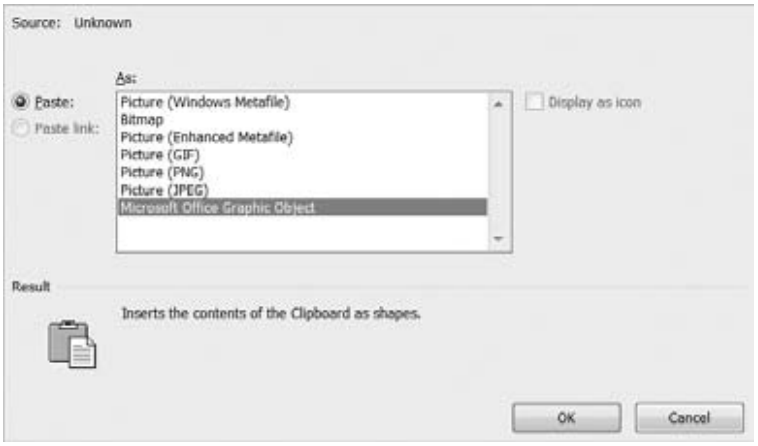
- **Microsoft Office Excel Worksheet Object:** Inserts the selection as a complete mini-spreadsheet, complete with Excel facilities

- **Formatted Text (RTF):** Inserts formatted text as a table, retaining the cell, column, and row formatting in effect in the Excel file. This option often misinterprets cell shading and other colors.
- **Unformatted Text:** Inserts plain text with no attributes. Tabs are used to separate text that originated in different cells.
- **Picture (Windows Metafile):** Inserts a `.wmf` picture file that does not retain the cell divisions in the resulting picture, that is, it's just a picture of the text (larger than either Bitmap or Enhanced Metafile)
- **Bitmap:** Inserts a `.png` picture file (smaller than either of the other two picture options)
- **Picture (Enhanced Metafile):** Inserts an `.emf` picture file that is essentially identical in appearance to the Windows Metafile, but is slightly smaller in size
- **HTML Format:** Retains text formatting, but doesn't retain all of the table formatting. This usually results in a table that is smaller in width than the RTF table. This option inserts cell shading and colors more accurately than RTF.
- **Unformatted Unicode Text:** Usually, this yields the same result as unformatted text. Unicode goes well beyond ASCII and ANSI and provides for many more characters and languages. If you find that linguistic information is being lost when pasting as unformatted text, then switch to unformatted Unicode text.

When you copy graphics from Excel to Word, the rules change a bit, and things become more familiar. Right-click the graphic and choose Copy. This time, you don't get the dashed selection because you're not copying cells — so it's a bit simpler, and once something has been copied to the Clipboard, the Paste Special options remain available. Switch to Word, and you'll see the options shown in Figure 54-3.

FIGURE 54-3

When copying pictures from Excel to Word, no special handling is required.



The simplicity stops there, however, because the choice you make can produce wildly varying file sizes. For example, a 40K `.jpg` file was inserted into an Excel worksheet. It was then copied to the Clipboard so it could be pasted back into Word, to see what difference the different Paste Special options make. The dramatic differences are shown in Table 54-1.

TABLE 54-1

Graphics Sizes When Using Different Paste Methods

Paste Special Method	File Extension	Size
Picture (Windows Metafile)	`.emf`	460K
Bitmap	`.bmp`	331K
Picture (Enhanced Metafile)	`.emf`	214K
Picture (GIF)	`.gif`	129K
Picture (PNG)	`.png`	821K
Picture (JPEG)	`.jpg`	47K
Microsoft Office Graphic Object (Default)	`.jpg`	40K

When using Paste Special, you might want to experiment to see which format gives you the best appearance in your document depending on how it's going to be presented (online versus on paper). However, based only on file size, Word's default option, Microsoft Office Graphic Object, is the best choice.

Chart

When you insert a chart, assuming Excel 2010 is installed and available, Word starts Excel, uses a placeholder data set in an Excel worksheet, and creates a chart based on that data. As described in Chapter 23, the chart is embedded as an Excel object in Word. Use Excel to replace the data set with the data you want to use. The chart and all information taken from the data set are updated automatically. See Chapter 23 for details.

For the record, though, this is not how charts typically are created in Word. Instead, you would begin the process in Excel, not Word, and would ultimately copy the resulting chart into Word.

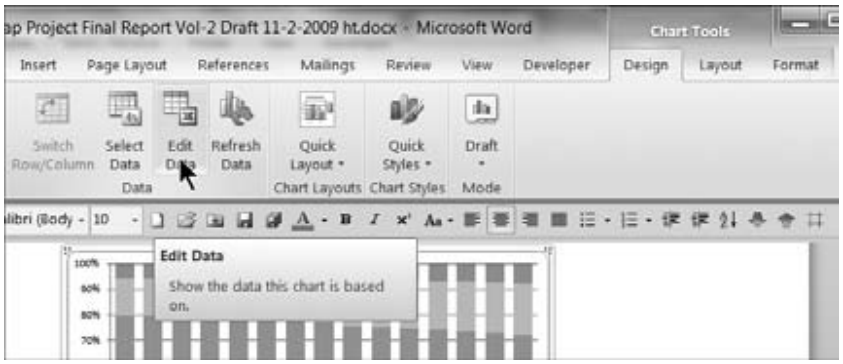
Once the chart is in Word, additional formatting can be performed using the Chart Tools ribbons — Design, Layout, and Format. If you need to change the data, however, use Excel, but don't start Excel directly. Instead, click inside the chart, choose the Chart Tools Design ribbon, and then click Select Data or Edit Data in the Data section of the ribbon, as shown in Figure 54-4.

When you make changes to the data, the chart itself in Word is updated automatically. If there's a chance that you'll need to undo changes, leave Excel open. As long as it remains open, Ctrl+Z

will work. If you close Excel, changes to the chart and data set are saved automatically. However, Excel really does close, so Ctrl+Z will no longer undo changes you might have made.

FIGURE 54-4

Clicking Edit Data in the Design ribbon tab selects and opens the data in Excel.



Object

A third way to use Excel data in a Word document is as an object. In Word, choose Insert ➪ Object ➪ Object. To use an existing Excel worksheet, click Create from File. To create a new Excel object, click Create New.

Create from File

Use the Browse button to navigate to the target file. As described in Chapter 24, choose Link to File and/or Display as Icon, according to your needs, and click OK.

Note

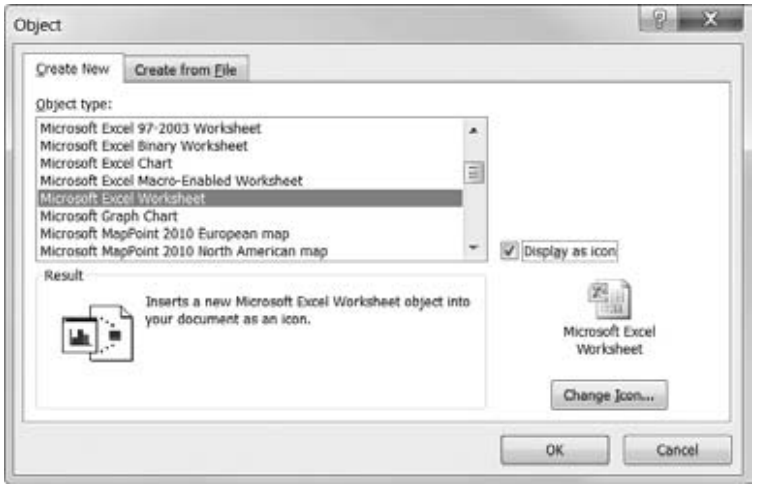
Typically, you would use Display as Icon when the purpose is to provide access to the contents of the Excel file, rather than to display it. For example, suppose you have a number of tax tables that you want to provide to the reader. Some readers need one table, others need another, and so on. A document will be much less cluttered if users can click a link to open the data set of interest in Excel, rather than make all readers have to look through all of the data files to find the one they want. ■

Create New

In the Create New tab of the Object dialog box, select the desired type of Excel object, as shown in Figure 54-5. Choose Display as icon, if desired (click Change Icon, if appropriate), and then click OK. Use Excel's tools to create the desired object, and then close Excel. When you close Excel, you will be prompted to save the changes in the Word document. Click Yes to save the changes; click No to keep working on the Excel object; or click No if you don't mind losing the work you've been doing.

FIGURE 54-5

The Change Icon button appears only if Display as icon is checked.



Tip

Notice that when working in Excel this way, there is no way inside the Excel object to save your work. Saving is controlled within the Word process. If you would like to have an independent version of the Excel object that is accessible from Excel without using Word, copy the contents of the "objectized" Excel worksheet to the Clipboard, open the full Excel application, paste your work into it, and save it. ■

To insert the contents of the file, click Insert. To link to the contents, click the drop-down arrow next to Insert, and choose Insert as Link. Word now issues a confirmation dialog box. If you're sure the Excel file you're opening is safe, click Yes.

From Spreadsheet to Table

When you use one of the methods shown to insert formatted Excel data into Word, a Word table is created automatically. Sometimes, however, you need to insert data into a table that already exists. Typically, two problems can occur. First, sometimes the pasted cells don't go exactly where you want them to go. Second, no matter what you do, the formatting in the table never ends up exactly as you want.

To handle the first problem, the dimensions (rows and columns) of the source must be identical to the destination, and the destination cells must be selected. For example, if you are pasting a selection of cells that contains 5 rows and 4 columns, then the destination must also be 5 × 4, and you must select the destination cells. If you try to paste in the top-left cell (which seems logical, right?), Word will paste the entire selection into that cell, so you end up with a table within a table.

There is no perfect way to handle the second problem. Even if you choose the setting File ➪ Options ➪ Advanced ➪ Pasting from other programs to Match Destination Formatting or Keep Text Only, *something* in the formatting will be messed up — usually the spacing.

Your best bet, assuming you're using a style, is to choose Paste Special ➪ Unformatted Text, and then reapply the style to the pasted cells. Alternatively, if there are table cells that contain the correct formatting, use the Format Painter to reformat the pasted cells as desired.

Tip

If you are inserting new cells into an existing table (as opposed to replacing existing material), insert blank rows so you have empty cells that you can select and into which you can paste the incoming cells. ■

Using Word Content in Excel

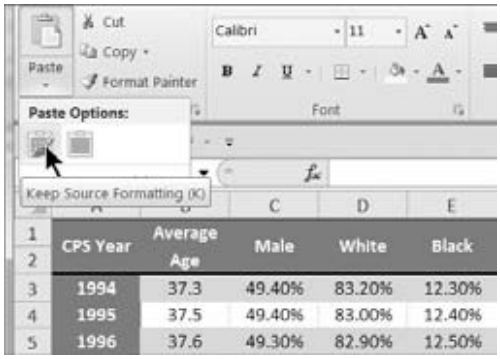
Going from Word into Excel isn't quite as tricky as going from Excel into Word, although there are some quirks worth being aware of.

Clipboard

When pasting content from Word into Excel — using the default Paste behavior — different kinds of content are handled differently. To see your options, make your selection in Word and copy or cut it to the Clipboard. In Excel, click the Paste drop-down arrow for the options shown in Figure 54-6.

FIGURE 54-6

When pasting text and/or table material from Word into Excel, the Paste Options buttons show a live preview of the result.



Note

When pasting a picture link, if the source text or tables' material is updated, then it is automatically updated in Word. If you replace the picture, the picture will not be updated. If the source picture is updated (that is, it is linked and the original picture changes, but it keeps the same name and location), then the picture will be updated. ■

When pasting text that includes one or no paragraph marks, it is inserted into the selected cell. If the selection contains multiple paragraphs, it is inserted into consecutive cells in the target column. For example, if the Clipboard contains three paragraphs and you paste into Row 1 Column 1, the three paragraphs are inserted into Row 1 Column 1, Row 2 Column 1, and Row 3 Column 1, respectively.

When pasting all or part of a table into Excel, the cells are inserted into separate cells matching the original selection in Word. Destination cells do not need to be selected. For example, to copy a 5 × 4 table from Word to Excel, select the table and copy or cut it to the Clipboard. Right-click in the upper-left cell of the 5 × 4 area where you want the table to appear and choose Paste. Again, formatting and cell shading can be copied as well by clicking the Keep Source Formatting paste button.

When you paste a picture from Word into Excel, it is inserted into Excel's drawing layer, rather than into cells. Note that Excel does not have an In Line with Text option for graphics.

Drag and Drop

Unlike when going from Excel to Word, when you go from Word to Excel, drag and drop does work, as long as drag and drop editing is enabled in Word (File ➪ Options ➪ Advanced ➪ Editing Options ➪ Allow text to be dragged and dropped).

Caution

When dragging from one program to another, the normal default is for text to be copied. When dragging from Word to Excel, the default action is to move the selection. If you really want to move the text, fine. If you instead merely want to copy, then the Ctrl key needs to be pressed when you drop the text. Ctrl doesn't need to be pressed when you begin the drag. However, it does need to be pressed when you drop. When you press the Ctrl key, notice that the drag icon suddenly gains a + sign, signifying that it will be copied. If you're not comfortable pressing the Ctrl key when dragging, you can right-drag, instead. When you right-drag, you will be provided a context menu when you drop, allowing you to choose among copy, move, and other options. ■

Object

You can insert a new or existing Word document into an Excel file as an object. To insert part of an existing Word file as an object, select the portion you want and copy it to the Clipboard. Click where you want it to reside, and choose the Paste button's drop-down arrow, and then Paste Special. In the Paste Special dialog box, shown in Figure 54-7, choose Microsoft Word Document Object. Select Display as icon and Paste or Paste link, as needed, and then click OK. Note that when using the Clipboard approach, you often can't get the entire document, even if you press Ctrl+A (Select All). That's because Ctrl+A excludes contents such as headers, footers, and footnotes. To insert the entire file as an object, therefore, you need to use a different approach.

To insert the entire file as an object, in Excel, choose Insert ➪ Object. Using Create New or Create from File, proceed as shown earlier in this chapter.

FIGURE 54-7

Use Paste Special to paste the Clipboard's contents as a Word object.



PowerPoint

In some ways, Word and PowerPoint were meant to work together. That's because PowerPoint uses heading levels that are similar to Word's Heading styles. When creating a PowerPoint presentation, for example, it's a simple matter to convert a Word outline into a PowerPoint presentation (or at least the basis for one), or to use a PowerPoint presentation as an outline for a Word document.

Converting Word to PowerPoint Presentations

Converting a Word document outline into a PowerPoint presentation is simple — as long as you've used Word's Heading styles for your outline, and as long as the outline contains no other text. Unfortunately, PowerPoint is not able to extract just the outline from a Word document, so you're going to have to manage that trick yourself if the document has already been written.

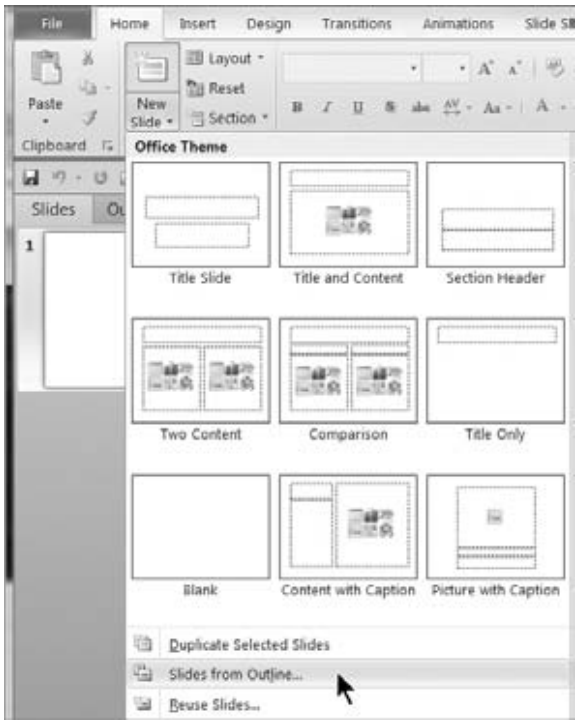
Tip

A quick way to obtain an outline from a Word document that was formatted using Heading levels is to insert a table of contents. Copy the table of contents to another document, press Ctrl+Shift+F9 to convert it to static text, save it, and then proceed. ■

To convert a Word outline into a PowerPoint presentation, in PowerPoint, start a new PowerPoint presentation (Ctrl+N). In the Home ribbon in PowerPoint, click the New Slide drop-down arrow, and choose Slides from Outline, as shown in Figure 54-8. In the Insert Outline dialog box, find the document containing your outline, select it, and click Insert.

FIGURE 54-8

You can use a Word outline to create a PowerPoint presentation.



Note

Once you've inserted an outline into a PowerPoint presentation, you'll often discover that stray or extra paragraph marks insinuate themselves prominently in the PowerPoint presentation, creating unsightly gaps. You can fix them in PowerPoint, or, if it's easier, press Ctrl+Z to undo the insert, clean up the outline in Word, and then try again. ■

Tip

In PowerPoint's Normal view, click the Outline tab. Working with a presentation in Outline view, you might find it as easy to clean up an imported outline there as it would be to go back to Word and start over. Note that some of Word's more useful outlining keystrokes, such as Alt+Shift+cursor keys, perform the same actions in PowerPoint as they do in Word — demoting, promoting, and moving selected outline headings. ■

Converting PowerPoint Presentations to Word Documents

You can also go in the other direction, using a PowerPoint presentation as a starting outline for a Word document. In PowerPoint, choose File ➪ Save as. Set Save as Type: to Outline/RTF (*.rtf) — near the bottom of the non-alphabetized list — and then click Save. Unlike Word, PowerPoint does not open or display the `.rtf` file, and it is immediately available for Word to open without your having to close anything in PowerPoint.

In Word, choose File ➪ Open, navigate to the `.rtf` file you just created, and open it. Then switch to Outline view. Look Ma! It's an outline! The top level for each slide was assigned Heading 1, the next level Heading 2, and so on.

You now have a Word outline of your document, and all you need to do now is fill in those petty details. You know — that stuff called content.

Outlook

In Office 2003 and earlier, Outlook and Word had a potentially much more intimate connection than they have in Office 2010. That's because you could use Word itself to view, edit, and compose your e-mail. Though Outlook's e-mail editor might look a whole lot like Word, it's not Word. Instead, it's a small mostly independent subset of Word, borrowed from the Word programming team. Even if you have only Outlook 2010, and do not have Word 2010, you still have the same Word-like editor in Outlook. In fact, if your word processing needs are fairly simple, you might not even need Word. But, let's not be hasty. After all — we have a *Word 2010 Bible* we want to sell you!

You've already looked at how to use the Outlook Address Book to perform an e-mail merge. See Chapter 43 for the nitty-gritty details.

Using the Outlook Address Book in Word

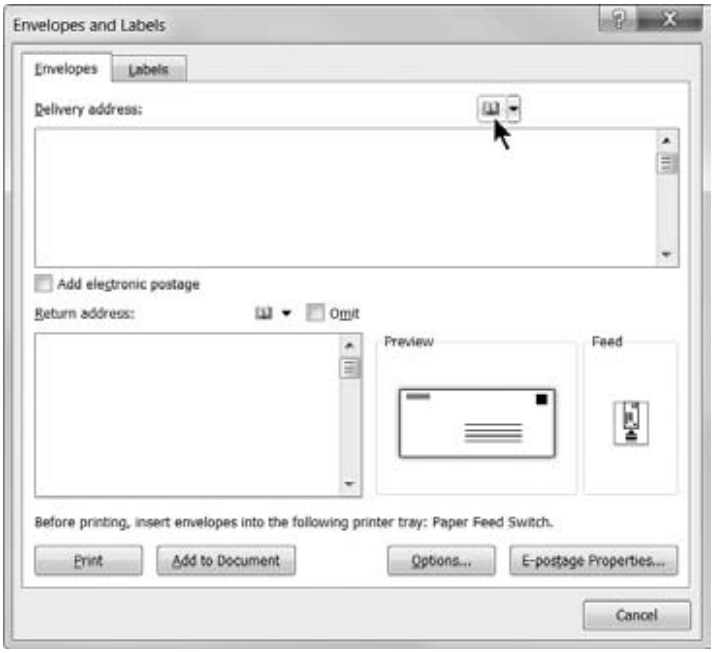
One of the more conspicuous relationships between Word and Outlook is in the use of the Outlook Address Book for addresses in Word documents — especially letters and envelopes. For example, in the Mailings ribbon, click Envelopes or Labels, and then click the Insert Address tool (see Figure 54-9).

The Select Name dialog box appears, as shown in Figure 54-10. If you have multiple Contact folders set up as address books, click the Address Book drop-down arrow and choose the one you want. Note that the Search option enables you to search the Name only or More columns. When you use Name only, the dialog box displays only names that start with what you type.

Alternatively, click More columns, type what you're looking for, and click Go. This search feature searches for occurrences of the search text anywhere in any contact field. If that still gives you too many hits, click Advanced Find. Use the Find dialog box to search for names containing text you type. When you find the person or business whose address you want, select it and click OK.

FIGURE 54-9

You can access the Outlook Address Book using the Insert Address tool.



That's great for envelopes and labels, but what about for inserting the address in the body of the letter, or what if you want to type "John's mailing address is . . . "? You could simply use the envelope or label feature, select the address from the dialog box, and then dismiss the Envelopes and Labels dialog box (unless your address book is set up to display the contact's name, rather than name and e-mail address). Someone reading this does exactly that. Caught you, eh?

Rather than send you on a hunting expedition, let's save a little trouble right now. The Address Book or Insert Address tool does not exist in any freestanding ribbon. The only way to get to it in the default ribbon is using the Envelopes and Labels dialog box.

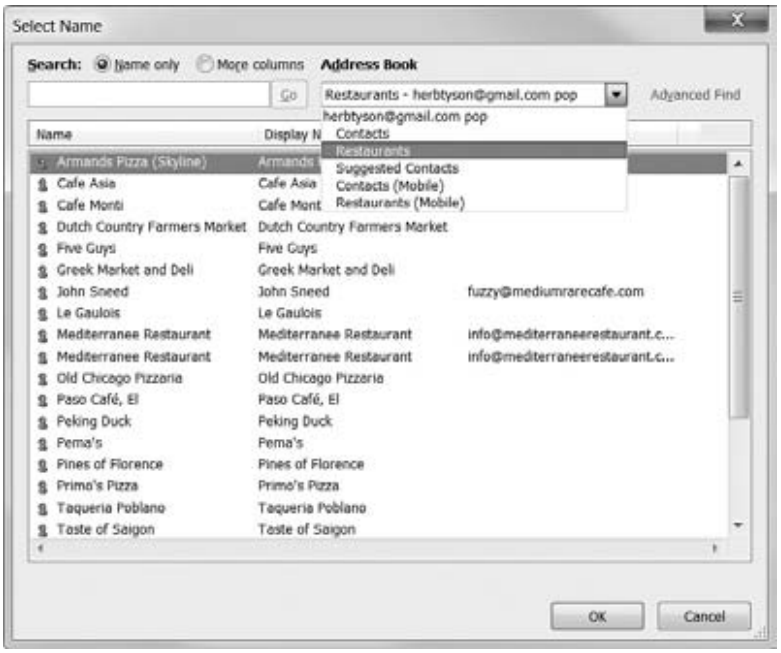
However, there is a better way. If you were following along, dismiss the various dialog boxes, right-click the Quick Access Toolbar, and choose Customize Quick Access Toolbar. You probably saw this coming, right? To drive home the point, set Choose Commands From to Commands Not in the Ribbon. About halfway down the first page of A commands, locate Address Book. Click on it and click Add. If you don't like where it is, you can use the up or down buttons to move it.

Note

The only difference between this Address Book tool and the one in the Envelopes and Labels dialog box is that the latter has a drop-down arrow from which you can select recently inserted addresses. ■

FIGURE 54-10

Insert addresses in Outlook using the Address Book.



Summary

In this chapter, you've learned several ways to exchange data between Word and Excel. You've also seen how to convert Word outlines into PowerPoint presentations, and how to create a Word outline using a PowerPoint presentation. Additionally, you've looked at several ways that Outlook and Word stay in contact with, well, Contacts. You should now be able to do the following:

- Insert Excel content in a Word document using a variety of different methods
- Use the Clipboard and drag and drop to copy or move content from Word to Excel
- Use the Address Book tool to insert a contact's address anywhere in Word

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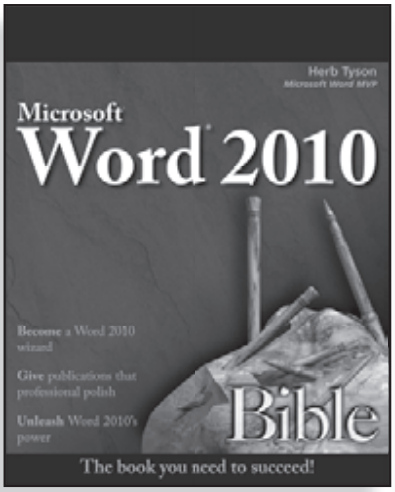
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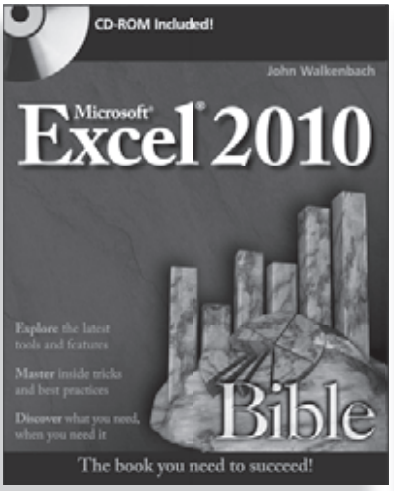
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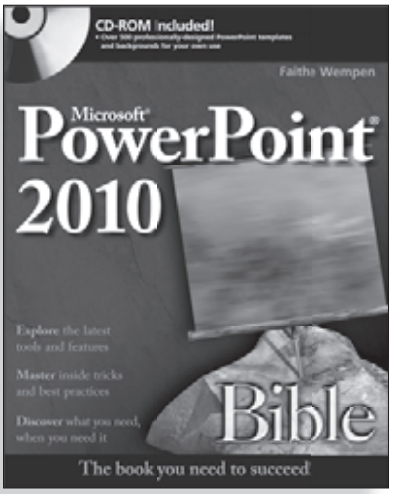
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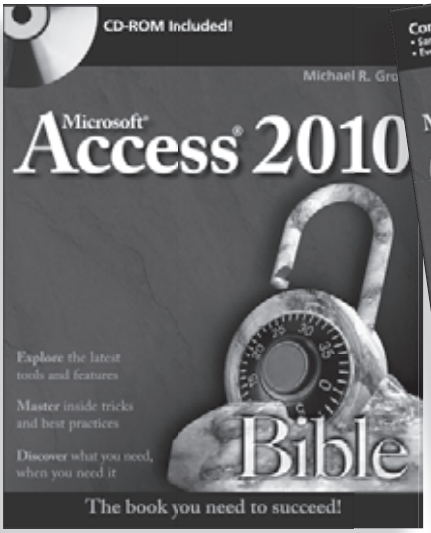
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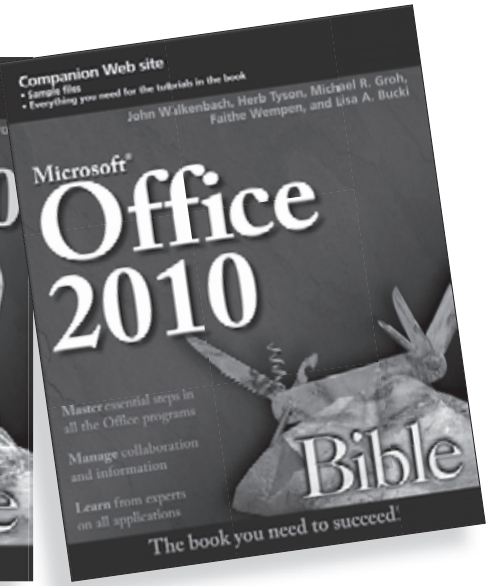
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Herb Tyson

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