Module 3 - Word: Collaborating With Others and Working With Reports

General Notes

SLO 3.1: Using Comments

- Use comments to provide feedback in document without changing text
- Can customize appearance, review, edit, and delete comments
- Each comment is attributed to user name stored in Office
- Can change user name in Office

Change User Name

1. Open Track Changes Options dialog box (Review tab, Tracking group)
2. Click Change User Name button to open Word Options dialog box
3. Enter name and initials in text boxes

4. Check box to always use these values

5. Click OK to close Word Options dialog box

6. Click OK to close Track Changes Options dialog box

Insert a Comment

- Comment appears in Markup area to right of document

- Author's name and time/date appear with comment text below

1. Select text to insert comment

2. Click New Comment button (Review or Insert tab, Comments group)

3. Type message in comment

4. Click within document to leave Markup area

Modern Comments

- Use @mentions to mention people in comments and link them to document

- Person will receive email notification if already shared

Ink Comments

- Handwrite comment using stylus or finger on touch-screen computer

- Comment displays larger in Markup area, use eraser to remove text

Review Comments

- Each comment is attributed to reviewer

- Navigation tools to move to next/previous comment

- Reply, resolve, or reopen comment

Edit and Delete Comments

- Edit comment by clicking and editing text

- Delete comment individually or delete all comments in document at once

SLO 3.2: Using Track Changes and Sharing

Track Changes

- Valuable editing tool in Word that marks changes in a document
- All reviewers can see changes in the document
- Changes display in body of document and in Markup area
- To turn on Track Changes:
    - Click the Track Changes button [Review tab, Tracking group]
    - Alternatively, click the Track Changes drop-down list and select Track Changes
    - To turn off Track Changes, click the Track Changes button
    - Ctrl+Shift+E toggles Track Changes on and off

Display for Review Views

- Determines appearance of editing changes in document
- Different views: Simple Markup, All Markup, No Markup, Original
- All Markup view is typically used when reviewing document with changes
- Click the Display for Review drop-down list [Review tab, Tracking group] to select view

Accept and Reject Changes

- Review each proposed change and accept or reject it
- Best to work in All Markup view when reviewing document with tracked changes
- Changes attributed to a reviewer
- To accept or reject changes:
    - Place insertion point at beginning of document
    - Click the Display for Review drop-down list [Review tab, Tracking group] and select All Markup
    - Click the Next or Previous button [Review tab, Changes group] to select change
    - Click the Accept or Reject button [Review tab, Changes group]
    - Use Accept or Reject drop-down list for additional options

- Word stops on comments, accept or reject comment

Reviewing Pane

- Separate pane that includes all tracked changes and comments
- Can be displayed vertically or horizontally
- To open Reviewing pane:
  - Click the Reviewing Pane drop-down list [Review tab, Tracking group]

Share an Online File

- Option to share online file with others for real-time collaboration
- File must first be saved in OneDrive
- To share file:
  - Open file
  - Save file to OneDrive if necessary
  - Click the Share button in the upper-right corner of the Office app window
  - Click the Link settings button to open the Link settings window
  - Select who can use sharing link and set options
  - Copy sharing link and paste in email or other online location
  - Type email address of recipient in the To: Name, group or email area
  - Type message to recipient in Message area (optional)
  - Click the Send button

SLO 3.3 - Using Footnotes and Endnotes

- Footnotes and endnotes are used to cite reference sources and provide additional information.
- Footnotes display at the bottom of each page, while endnotes display at the end of the document.
- Word numbers notes consecutively and can customize the number format and convert between footnotes and endnotes.

Inserting Footnotes

- Place insertion point after word where footnote is to be inserted.

- Click the "References" tab and the "Insert Footnote" button.
- Type the footnote text in the footnote area at the bottom of the page.

Inserting Endnotes

- Place insertion point after word where endnote is to be inserted.
- Click the "References" tab and the "Insert Endnote" button.
- Type the endnote text after the text at the end of the document.

Viewing Footnotes and Endnotes

- Use the "Next Footnote" button in the "Footnotes" group on the "References" tab to move to the next footnote.
- Use the "Show Notes" button to toggle between reference markers and note text.
- Place pointer over reference marker to see text of footnote or endnote.

Customizing Footnotes and Endnotes

- Change the number format, reference marker, start number, and numbering in the "Footnote and Endnote" dialog box.
- Choose where to position the footnote or endnote text.
- Apply changes to whole document or specific section.

Modifying Footnote and Endnote Format

- Format footnote or endnote text like regular text in the document.
- Modify the Footnote or Endnote style to automatically update all notes.

Converting Footnotes and Endnotes

- Use the "Convert Notes" feature to convert between footnotes and endnotes.
- Convert individual notes using the context menu.

Moving Footnotes and Endnotes

- Move notes like text in a document.

Deleting Footnotes and Endnotes

- Always delete the reference marker in the body of the document to delete the note.
- Deleting the text in the footnote or endnote area will not delete the reference marker.

SLO 3.4 Creating a Bibliography and Inserting Citations

Report Styles

- Two most common report formats are MLA and APA
  - Table 3-2 lists the general characteristics of each format
  - Format can vary depending on the preference of the college or instructor

SLO 3.5 - Inserting a Table of Contents

Creating a Bibliography and Inserting Citations

- Word includes tools to create sources, insert citations, and create a bibliography
- The report style you select controls the formatting of sources and citations
- Add a New Source:
  - Gather bibliographic information and use the Add New Source feature in Word to insert a citation and store source information
- Insert a Citation:
  - Choose from citations you have previously created
- Insert a Placeholder:
  - Temporarily marks a spot where a citation needs to be completed
- Manage Sources:
  - Use the Source Manager dialog box to edit sources, add information to placeholders, create new sources, and copy sources
- Edit Citations and Sources:

- Can be edited using drop-down list or context menu
- Use the Researcher:
    - Search for quotes, citable sources, and images
    - Add citations and topic headings to the report
- Insert a Bibliography:
    - Word provides a variety of bibliography options
    - Choose one of the built-in options to include in the table of contents

To insert a table of contents in a report:

1. Apply a heading style to each heading in the document.
2. Place the insertion point before the first line of the report and press Ctrl+Enter to insert a page break.
3. Position the insertion point at the top of the new first page.
4. Click the References tab.
5. Click the Table of Contents button [Table of Contents group].
6. Select a built-in table of contents to insert.

To insert a custom table of contents:

1. Place the insertion point before the first line of your report and press Ctrl+Enter to insert a page break.
2. Position the insertion point at the top of the new first page.
3. Type a title for the table of contents (if desired).
4. Click the Table of Contents button [References tab, Table of Contents group].
5. Select Custom Table of Contents.
6. Customize the table of contents using the options in the Table of Contents dialog box.

To modify a table of contents:

1. Click anywhere in the table of contents.
2. Click the Table of Contents button [References tab, Table of Contents group].
3. Select Custom Table of Contents.
4. Customize the table of contents.
5. Click OK to replace the existing table of contents.

To update a table of contents:

1. Click anywhere in the table of contents.
2. Click the Update Table button [References tab, Table of Contents group].
3. Select either Update page numbers only or Update entire table.
4. Click OK to update the table of contents.

To remove a table of contents:

1. Click the Table of Contents button in the Table of Contents group on the References tab.
2. Select Remove Table of Contents.

SLO 3.6 - Inserting a Cover Page

Inserting a Cover Page

- Reports frequently include a title page as the cover or introduction.
- Word provides a variety of cover page options.

Insert a Built-In Cover Page

1. To insert a cover page, click the Cover Page button in the Pages group on the Insert tab.
2. Select one of the built-in cover pages from the drop-down list.
3. Additional custom cover pages are available on Office.com.

Customize Cover Page Content

1. The built-in cover pages include graphics, text boxes, and Word fields.
2. Customize the content of the fields, delete unwanted fields, and modify the graphics and text boxes on the cover page.
3. The theme of the document controls the format of cover pages.

Customize Document Property Content

- If you add information to the document properties, Word automatically populates the document properties fields in the cover page.

- To customize document properties:
    1. Click the File tab and select Info.
    2. Show All Properties and add or modify document property content.

Add or Remove Document Property Fields

- To add a document property field:
    1. Position the insertion point where you want to insert the field.
    2. Click the Quick Parts button on the Insert tab.
    3. Choose Document Property and select a field from the drop-down list.
- To remove a document property field:
    - Click the field handle to select it and press Delete.

Customize Content Control Fields

- To insert custom content in a content control field:
    - Click the field and type the text.
- To remove a content control field:
    - Click the field handle to select it and press Delete.

Remove a Cover Page

- To remove a cover page:
    - Click the Cover Page button on the Insert tab and select Remove Current Cover Page.
    - Word deletes the entire contents of the cover page and removes the page break.

SLO 3.7 - Using Advanced Headers and Footers

Headers and Footers

- Used to include page numbers and document information at top/bottom of each page in report/multipage document
- Headers appear at top, footers appear at bottom
- Automatically display on subsequent pages

- Can automatically insert page numbers and add custom content such as text, document property fields, date, or borders

Page and Section Breaks

- Used for multipage documents to control page endings or special formatting in different sections
- Page break controls where one page ends and another begins
- Use Next Page section break for special document layout formatting on a whole page or multiple pages
- Use Continuous section break for special formatting to a section of the document
- Do not use section break to control page endings

Built-In Headers, Footers, and Page Numbers

- Word provides built-in headers, footers, and page numbering options to insert and customize
- Can insert built-in header and footer content with header/footer open or while in main document
- Many built-in headers/footers contain document property fields or content control fields

Customize Header and Footer Content

- Can type text or insert/delete content control fields
- Can format header/footer text by applying font formatting and borders, inserting graphics, and modifying/setting tabs for alignment

Different First Page Header and Footer

- Option to have page number or header/footer content not display on first page but display on subsequent pages
- Can choose to leave first page header/footer blank or insert different content

Different Odd and Even Pages

- Option to have different odd and even pages header/footer content

- Best to insert header/footer content on first page and then make any desired header/footer option changes

Link to Previous Header or Footer

- By default, headers/footers are linked to previous headers/footers
- Can break this link to format header/footer content in one section independently of header/footer in another section

Format Page Numbers

- Can change page number format and starting page number
- Insert next page section break between sections to format page numbering differently for each section

Navigate between Headers and Footers

- Word provides buttons to navigate header/footer areas: Go to Header, Go to Footer, Previous, and Next

Remove a Header or Footer

- Open header/footer and manually delete content to remove header/footer
- All linked header/footer content is also removed
- Word can also automatically remove header/footer from document.

Chapter Summary

- **3.1.** Insert, review, edit, and customize comments (p. W3-142).
- Use **comments** to insert a note or provide feedback in a document. The content and format of the document does not change.
- Comments are numbered sequentially in a document and are associated with an **author** or **reviewer** using a Microsoft Office **username** and **initials**, which is customized in the Word Options dialog box.
- Multiple reviewers can add comments to a document.
- Users can add, edit, or delete comments. Comments appear to the right of the document in the **Markup area**.

- Use **modern comments**, also referred to as **@mentions**, to mention a person in a comment.
- Use **Ink Comment** to insert a handwritten comment using a stylus or finger on a touch-screen computer.
- Use the **Next** and **Previous** buttons to review comments in a document.
- When you place your pointer on a comment, a tag provides details about the user name and date and time of the comment.
- **Reply** to a comment, **Resolve** a comment, or **Reopen** a comment.
- Delete comments individually or delete all comments in the document.
- **3.2.** Modify and review a document using Track Changes and share an online document (p. W3-146).
- **Track Changes** is a collaboration tool that enables reviewers to make and track changes in a document.
- Word provides four different **Display for Review** views to display changes in a document: **All Markup**, **Simple Markup**, **No Markup**, and **Original**.
- When Track Changes is on, each change is attributed to a reviewer and his or her user name.
- Review changes using the **Previous** and **Next** buttons.
- Accept or reject individual changes in the document or accept or reject all the changes in the document.
- The **Reviewing pane** displays vertically on the left side of the document or horizontally at the bottom of the document and shows all the changes in the document.
- Customize which markup displays in the document.
- Use the Track Changes Options dialog box to customize how tracked changes appear in a document.
- Share online files with others. More than one user can edit an online file at the same time, which enables **real-time collaboration** on documents.
- The **Send link** window provides different options for sharing an online document.
- **3.3.** Insert and edit footnotes and endnotes in a document (p. W3-153).
- Add **footnotes** and **endnotes** to include additional information or reference sources.

- Footnotes appear at the bottom of the page, and endnotes appear at the end of the document.
- A **reference marker** is a number, letter, or symbol that indicates a footnote or endnote in the body of the document.
- Change the location, number format, and starting number for footnotes and endnotes in the Footnote and Endnote dialog box.
- Word styles control the format of footnotes and endnotes. Edit styles to modify how your footnote and endnote text appears in the document.
- Convert footnotes to endnotes or endnotes to footnotes using the **Convert Notes** dialog box.
- Move footnotes and endnotes using the drag and drop method or using cut and paste.
- When you delete a footnote or endnote reference marker in the body of the document, the associated footnote and endnote text is also deleted. Footnotes and endnotes automatically renumber if one is deleted or inserted.
- **3.4.** Create a bibliography with properly formatted sources and insert citations into a document (p. W3-157).
- A **source** is the complete bibliographic information for a reference (book, web page, journal article) used in a report.
- Use the **Add New Source** feature to a citation in your report and customize the source information.
- A **citation** is the abbreviated source information used in the body of a report.
- Insert a **bibliography** or **works cited** page to list the sources in your document.
- The **bibliography style** controls the format of the sources on the bibliography page and citations in the body of the document.
- Add a **placeholder** to temporarily mark a citation in the body of a report.
- Use the **Source Manager** dialog box to create and edit sources, edit placeholders, and view available sources.
- Use the **Researcher** to search for quotes, citable sources, and images about a topic and to display information from journals and websites in the Researcher pane.

- **3.5.** Create and edit a table of contents based on headings in a document (p. W3-169).
- Word can automatically generate a **table of contents** for a document.
- **Heading styles** (Heading 1, Heading 2, etc.) determine the content for a table of contents.
- Use built-in table of contents formats or customize the format of the table of contents.
- Use the Table of Contents dialog box to customize the format and the number of levels displayed in the table of contents.
- When document headings or pagination change, update the table of contents to reflect the changes.
- **3.6.** Insert a cover page and modify content and content control fields (p. W3-173).
- Word provides a variety of built-in **cover pages** available to add to your documents.
- A cover page has graphics, colors, text boxes, and Word fields that you can customize. The document theme controls the colors and fonts on the cover page.
- Use **document property** and **content control fields** to display information on the cover page. Customize or delete this content.
- **3.7.** Apply and customize headers and footers in a multipage document (p. W3-175).
- **Headers** and **footers** provide information and page numbers in a document. Headers are located at the top, and footers are located at the bottom of a document.
- **Page** and **section breaks** control pagination and page numbering in a document.
- Insert a variety of built-in headers, footers, and page numbers into a document.
- Customize content and page numbering in headers and footers.
- **Different first page** headers and footers enable you to include different information on the first page of a document.
- Use **odd and even page headers** and footers to display different information on odd and even pages in a document.
- Change the page number format and starting page number in the Page Number Format dialog box.

- Use the **Go to Header**, **Go to Footer**, **Previous**, and **Next** buttons to navigate while in the header or footer areas.

Q & A

1. You need to insert a footnote to cite a quotation in your research paper, use the **References** *Ribbon* tab.
2. The standard footnote reference marker format is **Superscript**.
3. MLA and APA are the two most common report formats. APA stands for **American Psychological Association**.
4. You need to insert a citation, but you don�t yet have all of the source information. You should mark that spot in the document with a **Placeholder**.
5. You want to create a built-in cover page for your report, you go to the *Insert* **tab**
6. The design of your cover page is controlled by the **Theme**.
7. You can customize all of your document's properties in the *Backstage* **view**.
8. Every heading that you want to include in your table of contents must have **Style**.
9. Your table of contents needs to be changed because you have added more information to the report. When you select the Update Table button [References tab, Table of Contents group], you can choose to update the entire table or just the **Page Numbers**.
10. Once you have created your sources and inserted citations in your report, the next step is to create a **bibliography**.
11. The dots that run from a table of contents entry to the page number are called a **Tab leader**.
12. Press **F9** to update a bibliography field.
13. The entries you select for your table of contents are based on your **Heading Styles**.
14. Word inserts a table of contents **at the insertion point**.
15. When you insert a comment in a document, the comment appears in a **Balloon**.