learnit

Course Reference Handout

MICROSOFT WORD - ADVANCED

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Forms

Forms:

Creating a form allows you to create a document that permits someone to enter data or select checkboxes but only in specific areas. Any other area of a form that has not been designated as an area you can work in is essentially off limits, and is therefore protected. In a form, a person would NOT be able to select, modify, delete or enter text unless you have set up a form field that allows for those actions to take place.

Developer Command Tab:

In order to insert the Form Fields you will need to create a Form, you may need to activate the Developer Command Tab on the Ribbon to provide you with the commands you will need. To activate the Developer Tab, click the File Tab and then select the Word Options command in the lower left. From the Customize Ribbon category of options, select the check box next to the command Developer to add the Developer Tab to your Word Ribbon.

Creating a New Form:

To begin creating a new form, start by creating the basic document that you will use as the template for the form.

Example

If someone will be required to enter their name in the form, you may have two lines of your document that look like this:

First Name:
Last Name:

Once you have the standard text that all documents based on this form will include, begin adding Form Fields and Form Controls where necessary using the options in the Controls group of the Developer Ribbon. Place you insertion point in the document where you want to add a Form Field or Control, and then click the appropriate command button from the Controls group on the Ribbon.
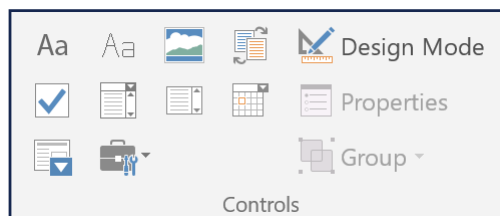
Protecting the Form:

Once you have completed your form, you must protect it before it can be used and to ensure others can't make changes to your form where they shouldn't. To protect the form, click the Developer command tab on the Ribbon, then click the Protect Document button and select Restrict Formatting and Editing. In the panel that opens on the right, click the check box in Section 2 and select the option of Filling in Forms. Once the form is protected, save the form as a Document Template to create new documents based on the form template.

Tracking Changes in a Document

To have someone revise a document and ensure that you will see any changes that have been made, you need to protect your document for Tracked Changes:

WITHOUT Protecting the Document:

Others can deactivate the Tracking of Changes:

1
- Click Review command tab from the Ribbon and then select Track Changes button.

## Protecting the Document from Tracked Changes:

Others can NOT deactivate the Tracking of Changes:

2
- Click Review command tab from the Ribbon and then select Protect Document button.
- In the panel that opens on the right, click the check box in Section 2 and select the option of Tracked Changes.
- Click the Yes, Start Enforcing Protection button in Section 3 and enter an optional password if you'd like.

Accepting or Rejecting Tracked Changes:

To accept or reject that changes that were made:

2
- Click Review command tab from the Ribbon and then select Restrict Editing button.In the panel on the right, click the Stop Protection button located at the bottom of the panel. Enter a password of necessary.

3
- From the Review tab of the Ribbon located changes by clicking the Previous or Next buttons in the Changes group of the Ribbon and then use the Accept or Reject buttons in the same group to keep or remove the changes accordingly.
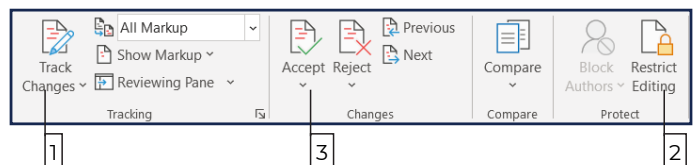
References

Creating a Table of Contents:

You can have Word automatically generate a Table of Contents for your document and then update it later should your page numbering change. A Table of Contents is generated by first applying Styles to the

text in your document that you want to see referenced in the Table of Contents, and then activating the Table of Contents feature.
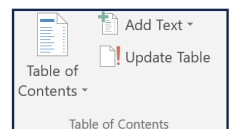
- First apply Styles to the paragraphs (or paragraph headings) that you want to have referenced in the Table of Contents. This could include built in Styles, such as Heading 1 or Heading 2 – or – you can use custom styles that have been created.
- Once you have applied the Styles you will use to reference text in your Table of Contents, place the insertion point in the document where you want the Table of Contents to be displayed. Click on the References command tab from the Ribbon and then select the Table of Contents button at the far right side of the Ribbon
- Select from available templates in the menu or click on the Insert Table of Contents... command at the bottom of the menu.
- If you select the Insert Table of Contents... command: In the Index and Tables window, select the Table of Contents tab.
- By default, Word will use Heading Styles to dictate the hierarchy of styles in the Table of Contents. So use other styles for the layout of your Table of Contents, click the Options button.
- Select any other formatting options you may want to apply from the Table of Contents tab, such as using a Tab leader or selecting a Table of Contents formatting template from the Formats drop down list. Click OK when done to insert the Table of Contents.

Footnotes and Endnotes:

Footnotes can be used to insert a reference to something in your document at the bottom of the page. Endnotes on the other hand can be used for referencing something in your document, but the reference will appear on the last page, or at the end, of the document. To insert footnotes and endnotes:

- Select the word or phrase for which you need to add a footnote or endnote.
- Click on the References command tab from the Ribbon, and then select Insert Footnote from the Footnotes group of the Ribbon.
- To insert an Endnote instead, use the Insert Endnote option located in the same Ribbon group as the Footnote command.
- Insert your reference text at the bottom of the page (for a footnote) or at the end of the document (for an endnote.)

Creating an Index:

You can have Word automatically generate an Index for your document and then update it later should you add or remove index references. An index is generated by first applying Indexing Markup to the text in your document that you want to see referenced in the index and then activating the Index feature. To markup a document and generate an index:

- Select a word or phrase in your document that you want to have referenced in your index.
- Click on References command tab from the Ribbon and then select Mark Entry from the Index group of the Ribbon.
- In the Mark Index Entry window, either verify the Main Entry text area contains the reference you want to see appear in your index or enter new text for the index reference. Use the Subentry text area to enter an index reference that you want to appear subcategorized under another reference of the index that you have typed in the Main Entry area.
- Continue marking up the document accordingly and click Close when done.
- To insert the Index, place your insertion point in the document where you want the Index to be inserted.
- From the References command tab click the Insert Index button to open the Index window if necessary.
- Click OK to insert an Index referencing all marked Index items.

Inserting Citations & Bibliographies

When you quote another author's work, the document containing the author's reference should be cited in a bibliography. Word 2016 allows you to create citations for quoted work and provides a built in bibliography feature, which comes in several different writing styles, allowing you to insert professional bibliography sections in just a few clicks!

To create and insert a Citation, click the Insert Citation button from the Citations & Bibliographies group located on the References Ribbon.

To insert a Bibliography section into your document, place the insertion point (cursor) where you want to insert the bibliography, then click the Bibliography button and select from either Bibliography or Works Cited. The information is the same, only the label is different.

To select a different writing style for the bibliography, use the Styles menu located in the Citations & Bibliographies group of the Ribbon.
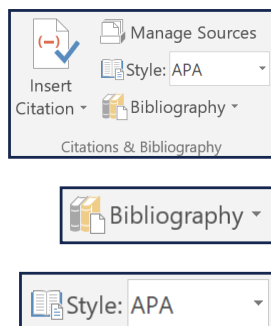
Macro

A macro is an automated series of commands, or tasks, which can be performed in Word with a single click of a button or keyboard shortcut. You can create a macro either by recording your own actions or by using a programming language known as VBA (Visual Basic for Applications.)

VBA (Visual Basic for Applications)

VBA is a programming language that allows program developers to customize Microsoft Office applications, among other programs, by working within the language that Microsoft Office applications are written in: Visual Basic (VB). When you record a macro in Word, the commands that are actually recorded by the macro are written in VBA code.

Visual Basic Editor

The VB Editor is an environment in which you work with VBA code. For example: when you edit a macro, because the macro is recorded in VBA code, the VB Editor opens so that you can view and modify the macro's code. To access the VBA code of a Macro, you may need to activate the Developer Command Tab on the Ribbon from the Customize Ribbon options in the Word Options window.

Recording a Macro

To record a series of actions in a macro so that you can automatically perform those same actions later:

- Select the View command tab from the Ribbon, then click the Macros button and then select Record New Macro.
- In the Record Macro window, assign a name to your macro.
- Use the Store macro in option to select whether this macro will be stored in only the active document or if it will be stored in the Normal.dotm template file, making the macro available in all new blank documents you create.
- To create a keyboard shortcut to run the macro, click the Keyboard button.
- In the Customize Keyboard window, press the keys on your keyboard you want to use as the shortcut. You can use combinations that include: [CTRL] + [Keyboard Letters], [CTRL] + [SHIFT] + [Keyboard Letters], [ALT] + [Keyboard Letters], etc.
- If you are assigning a keyboard shortcut, you will see any other commands that shortcut is already assigned to. If you create a shortcut already assigned to another command, your custom shortcut will override the existing one.
- To assign the shortcut and begin recording the macro, click the Assign button and then click the Close button. The macro will begin recording.
- If you did not assign a key board shortcut, from the Record Macro window click the OK button to begin recording the macro.
- When you have completed the last action in the document that you want the macro to record, click the Macros button on the Ribbon and then select Stop Recording.

Note:

Macro names cannot contain certain characters, such as spaces or hyphens among several others. You can use the underscore character however to create simulated spaces, such as "macro_name"

Note:

When performing actions that you want the macro to record that involve navigating in the document and selecting text, you will NOT be able to use your mouse pointer. You must navigate and select text using keyboard only techniques. To get a list of keyboard shortcuts for navigation and selecting text, click the Help button on the Standard Toolbar and type keyboard shortcuts in the Search area.

Web Page

A web page is a document that has been written in a special programming language that makes the page available for viewing on the internet (World Wide Web) or a company's intranet site. Web pages use a language called Hyper Text Markup Language, or HTML, that makes them viewable in a web browser. You can save a Word document in this format so that the document can be viewed in this manner from a web site.

Hyperlinks

A hyperlink is text or a graphic that when clicked will automatically take you to another location in a web page document or a different web page or web site altogether. You can also use hyperlinks to link a document to other documents or files, such as an Excel worksheet.

Converting a Word Document to HTML:
To save a Word document in web page format:

- Open or create a document that you want to post on a web site.
- Click on the File Tab from the upper left of the screen and select Save As.
- Select a location to save the web page file, and then enter a file name for your web page document.
- In the Save As Type drop down menu (just below the File Name) select a Web Page option: web page (.html) or single file web page (.mhtml).
- To change the title that appears in a web browser when the page is accessed, click the Change Title button. Note... this is not the file name. This is the text that appears in the "Title Bar" of your web browser.
- Click Save when done.
- When you save a document as a web page, there will be two key objects to look for: 1) the actual web page file that you saved and 2) a folder that contains any other files, such as graphics, that will also need to be displayed in the web page. Both the web page file and the contents folder would need to be posted to the web server that is hosting your web site for your page to be viewed correctly.

Using the Save & Send Options:
You can also save Word 2016 docs, either in HTML format or standard format, to other locations, such as Microsoft SharePoint or Microsoft's SkyDrive:

- Open or create a document that you want to post on a web site.
- Click on the File Tab from the upper left of the screen and select Save & Send.
- Select from options available, such as Save to SharePoint, or Save to Web to set up and connect to Microsoft's SkyDrive.

Inserting Hyperlinks

You can use hyperlinks in a document to create quick navigational links for accessing other locations on the web from your document, or to access to other files from the document.

Inserting a Hyperlink to a Location on the Internet:
- Select any text or graphic you want to use as the hyperlink.
- From the Insert tab of the Ribbon, click the Insert Hyperlink button – or – press the [CTRL] + [K] keys.
- Verify the Text to display option contains the text you want to serve as the hyperlink.
- In the Address area, type in the web address you want the hyperlink to be linked to, such as www.learnit.com
- Click OK when done.

Inserting a Hyperlink to Another File:
- Select any text or graphic you want to use as the hyperlink.
- Click the Insert Hyperlink button – or – press the [CTRL] + [K] keys.
- Verify the Text to display option contains the text you want to serve as the hyperlink.
- In the Look In drop down list, browse to the location of the file you want to create a link to.
- Select the file and then click OK when done.