

INSTRUCTOR-LED COURSEWARE

Word 2004 for Macintosh – Level 3

© PCM Courseware, LLC.
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EVALUATION ONLY

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Word 2004 Level 3 - Introduction

Welcome to PCM Courseware! PCM Course is a distinctive, flexible system for an instructor-led environment that facilitates learning via auditory, visual and hands-on experiences by each student. The manual is broken down into several lessons with each lesson subdivided into several sections. Each section covers a particular skill or concept related to the main lesson topic. In each section you will find:

1. A brief introduction to the section concept
2. Step-by-step "how to" instructions
3. A hands-on "Let's Try It" exercise which the students performs with the instructor
4. An independent "On Your Own" activity at the end of each lesson to identify any problem areas and to ensure that learning has taken place.
5. A chapter summary at the end of the lesson, reviewing major concepts and topics discussed in the chapter.
6. Chapter quiz to ensure that learning has taken place.

Rather than having to sift through blocks of paragraphs of written text, the introductions are brief and easy to understand, illustrated with diagrams, lists, tables and screen shots to aid in comprehension and retention. The step-by-step format of the manual enables for quick scanning by the instructor during teaching time and the ability to pull out the main points quickly without having to filter the desired information from chunks of text.

Course Requirements

It is assumed that the student has a fundamental understanding of the concepts taught in Microsoft Word 2004 – Level 2 for Mac.

A full installation of Microsoft Word 2004 should be available on each desktop, with a fresh installation strongly encouraged. While a printer is not needed to participate in this class, a printer driver must be installed on each desktop to complete certain lessons.

Components of the Manual

The Word 2004 for Macintosh manual contains the following components:

A Table of Contents - to allow the students to quickly find desired concepts

Introduction – discussion of manual components, course requirements, courseware philosophy and training lab setup.

Lessons – The lessons are the manual chapters, each of which is composed of several sections relating to the lesson topic or skill.

Sections – Each section begins with a brief introduction to the section topic and is followed by step-by-step instructions on how the student is to accomplish a particular task. The students then perform the task with the instructor in a “*Let’s Do It!*” exercise. Each step in the *Let’s Do It!* exercise provides the How (step-by-step) and Why (the reason for performing the step) of each phase necessary to accomplish the task.

Labs – Each section concludes with an independent “*On Your Own*” exercise called a Lab. The lab gives the opportunity for the student to practice what he/she has learned and to discover any problem areas with the topic in the section. Each lab covers skills in each section of the lesson.

Chapter Summary – Each section concludes with a “*Chapter Summary*” which briefly reviews all of the topics and concepts discussed in the section.

Chapter Quiz – Each section concludes with an independent “*Chapter Quiz*” to test the level of learning that has taken place. The quiz is in multiple choice and short answer format and can be done in class together or as an end of chapter test.

Class Project – Course concludes with an independent “*Class Project*” to test the level of learning that has taken place. In this project, the student utilizes skills learned throughout the class.

Index - to allow the students to quickly find desired concepts

Training Files

Each PCM Courseware course comes with a set of lesson files and lab files designed to employ real-world situations and examples. The lesson files are designed to be used in the *Let’s Do It!* exercises that the student performs with the instructor. The

lab files are to be used for the *On Your Own* exercises at the end of each Lesson. Both the lesson files and lab files should be stored in a folder on the student's desktop named **Lesson Files**.

What's New in Word 2004 for Macintosh?

What's New	Description of Feature
AutoCorrect Options Button	A new Smart Button, you can modify how Word makes an AutoCorrection. Rest your mouse over the changed word and then click the AutoCorrect button for available options..
AutoUpdate	AutoUpdate will automatically search for the latest version of Office 2004.
Compatibility Reports	Compatibility Report helps you identify and fix problems in a document when opening it previous or Windows versions of the Office program.
Formatting Palette	Addition of new palette sections and properties to the Formatting Palette. The New Add Objects section makes it easy to add drawing objects and shapes to your documents.
Navigation Pane	Improvements to the Navigation Pane make it easier to read. You can also navigate through miniature thumbnails of your document to easily find a specific section.
Notebook Layout	A quick way to organize and outline notes. It features a screen that looks like a ruled sheet of paper with tabs that you can add and remove.
Paste Options Button	A new Smart Button that allows you to specify the format of pasted text.
Project Center	New in Office 2004, Project Center provides a consolidated view of all information related to a project, such as e-mail messages, contact, meetings, tasks, documents and Scrapbook clips.
Project Gallery Update	Project Gallery offers additional templates and wizards. You also have the ability to customize the Project Gallery to suit your individual tastes.
Quick Preview	You can now view a miniature preview of your document called "Quick Preview" from the Print dialog box.
Reference Tools	Part of the new Office 2004 toolbox, Reference Tools includes a dictionary, thesaurus, encyclopedia and an Internet search feature to allow you to quickly find information.
Save as Picture	Office 2004 allows you to save an graphic from a document as a separate graphic file on your hard drive by control-clicking the graphic and selecting "Save as Picture" from the contextual menu.
Scrapbook	A repository for text and illustrations that you might need later on. The collected clips remain in the Scrapbook until you remove

What's New	Description of Feature
	them.
Send as HTML Mail	You can now easily include Word text, including formatting, into an HTML e-mail message.
Soft Shadows	In Office 2004, shadows now appear softer and more realistic. You can also now modify the properties (color, transparency, softness degree, etc.) of shadows.
Toolbox	New in Office 2004, the Toolbox provides access to the new Reference tools, the Scrapbook, Compatibility Report and the Project Center.

EVALUATION ONLY

Lesson 1 - Charts and Diagrams

Lesson Topics:

- 1.1 Creating a Chart
- 1.2 Formatting a Chart
- 1.3 Changing Chart Type
- 1.4 Inserting an Organization Chart
- 1.5 Modifying an Organization Chart

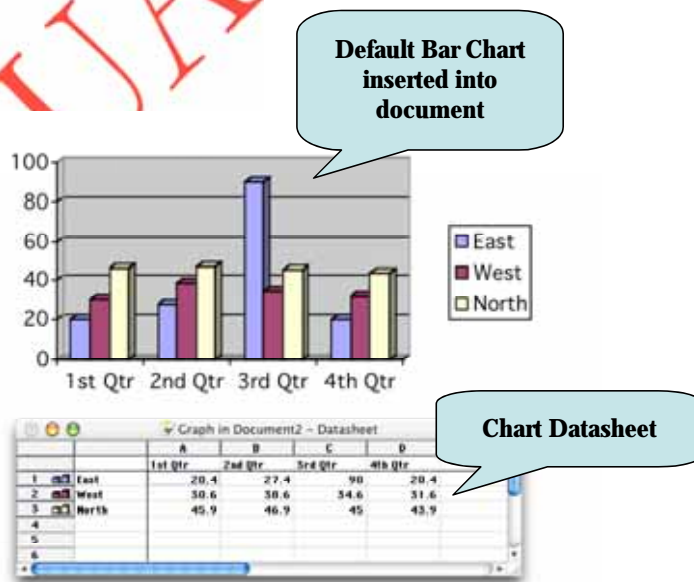
1.1 Creating a Chart

In this lesson, you will learn how to insert a chart into a Word Document

If you want you represent numerical data graphically, you can insert a **Chart** into your documents. To create a chart from scratch, use the **Insert > Object** command from the menu and select **Microsoft Graph Chart** from the Object Type list. This command will launch the **Microsoft Graph** charting program which inserts a default bar chart into your document and displays the chart's **Datasheet** complete with sample data. You can then enter your own data into the datasheet or import data from another source such as a text file or an Excel spreadsheet.

Double-clicking on the inserted chart opens the Microsoft Graph application, providing you a variety of menu options to format your chart as well as changing the chart type. Some available chart types are:

- Pie Chart
- Line Chart
- Bar Chart
- Area Chart
- Column Chart
- Doughnut Chart



To Create a Chart

1. Set the insertion point where you wish to insert the chart.
2. Select **Insert > Object** from the menu.
3. Select **Microsoft Graph Chart** from the list.
4. Click **OK**.
5. Enter desired data in the chart datasheet.
6. Click outside the chart when finished to deselect it.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Open Microsoft Word .	Launches the Word application.
2. Click the New Blank Document icon.	Opens a new blank document.
3. Select Insert > Object from the menu.	Opens the Object dialog box.
4. Scroll down the Object type list and select Microsoft Graph Chart .	Selects Microsoft Graph Chart as the type of object we wish to create.
5. Click OK .	Inserts a bar chart into your document and displays a datasheet with sample data.
6. Click inside of the datasheet.	Activates the datasheet.
7. Click inside of the cell that contains the word East as shown below and type: Harrison .	Enters data into the datasheet.

		D	
		4th Qtr	
1	East	90	20.4
2	West	30.6	31.6
3	North	45.9	43.9
4			

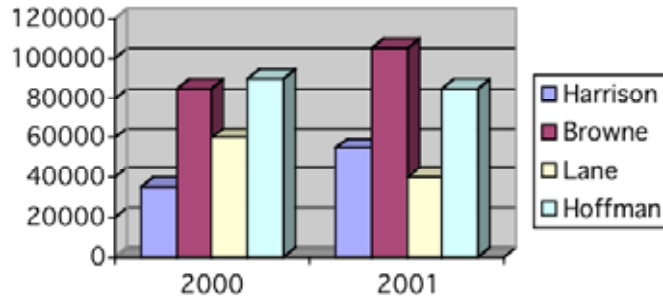
<u>What</u>	<u>Why</u>
8. Press the Return key and then type: Browne .	Enters data into the cell directly underneath the previous cell.
9. Press the Return key and then type: Lane .	Enters data into the cell directly underneath the previous cell.
10. Press the Return key and then type: Hoffman .	Enters data into the cell directly underneath the previous cell.
11. Click in the cell in the second column, first row as shown below and type: 2000	Enters data into the cell, replacing the words "1 st Qtr"
12. Press the Return key and then type: 35000 .	Enters data into the cell directly underneath the previous cell.
13. Press the Return key and then type: 85000 .	Enters data into the cell directly underneath the previous cell.
14. Press the Return key and then type: 60000 .	Enters data into the cell directly underneath the previous cell.
15. Press the Return key and then type: 90000 .	Enters data into the cell directly underneath the previous cell.
16. Click in the cell in the third column, first row and type: 2001	Enters data into the cell, replacing the words "2 nd Qtr"
17. Press the Enter key and then type: 55000 .	Enters data into the cell directly underneath the previous cell. Entering data into a cell that contains existing data automatically overwrites the old data with the new data.

<u>What</u>	<u>Why</u>
18. Press the Return key and then type: 105000	Enters data into the cell directly underneath the previous cell.
19. Press the Return key and then type: 40000 .	Enters data into the cell directly underneath the previous cell.
20. Press the Return key and then type: 85000 .	Enters data into the cell directly underneath the previous cell.
21. Click the heading for Column C , click and drag to the right to select Column C and Column D as shown below.	Selects Column C and Column D.
22. Press the Delete key.	Deletes the data for Column C and Column D.
23. Observe the completed datasheet and bar chart.	The bar chart automatically updates as you entered data into the datasheet.

EVALUATION

What

Why



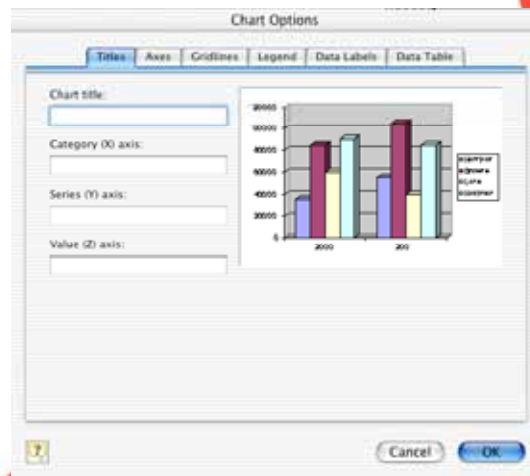
	A	B	C	D
	2000	2001		
1	Harrison	35000	55000	
2	Browne	85000	105000	
3	Lane	60000	40000	
4	Hoffman	90000	85000	
5				

- | | |
|---|---|
| 24. Select Graph > Quit & Return to Document 1 from the menu. | Deselects the chart and returns to normal view. |
| 25. Select File > Save As from the menu. | Opens the Save As dialog box. |
| 26. Select Desktop in the Sidebar. | Opens the Desktop folder. |
| 27. Click the Lesson Files folder in the column browser window. | Opens the Lesson Files folder. |
| 28. Type: MyChart in the Save as box. | Provides a name for the document. |
| 29. Click the Save button. | Saves the document and closes the Save As dialog box. |

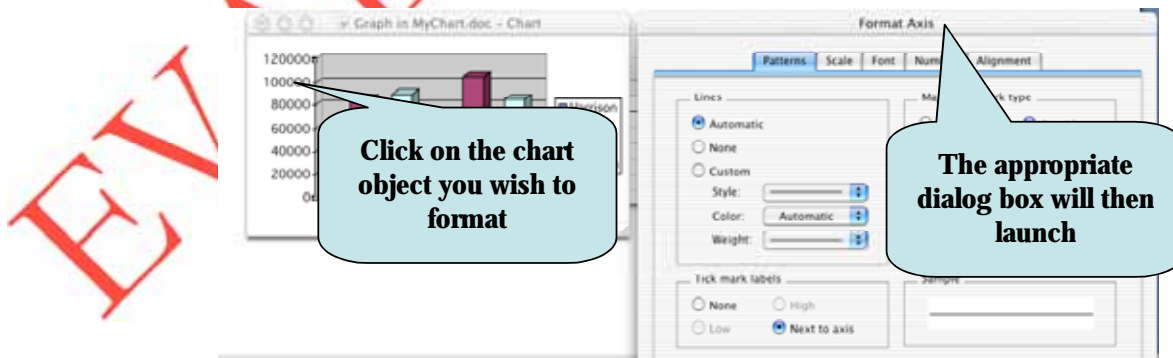
1.2 Formatting a Chart

In this lesson, you will learn how to apply formatting to your chart.

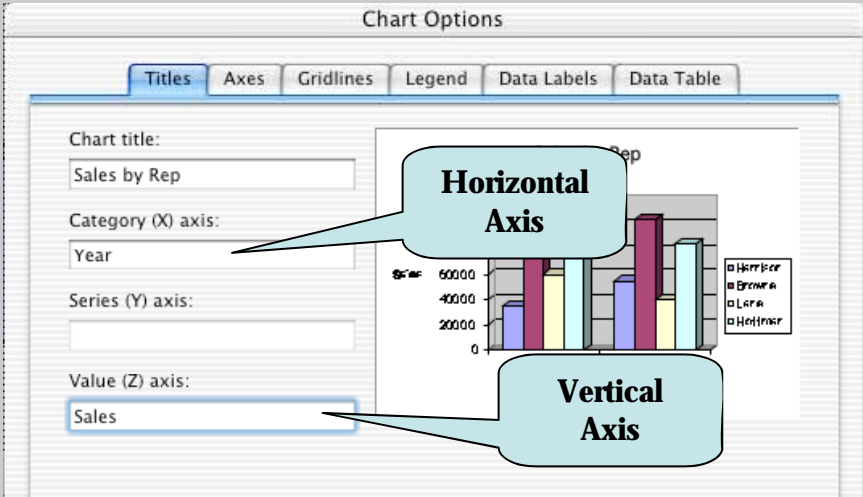
Once you have inserted your chart, you can then apply various formatting to it. For example, you can add chart options such as a Chart Title, Axis titles, Legend placement, etc. In order to format your chart, you must be working in the Microsoft Graph program (double-click on chart to launch the Microsoft Graph program). You can then access chart options by choosing **Chart > Chart Options** from the menu.

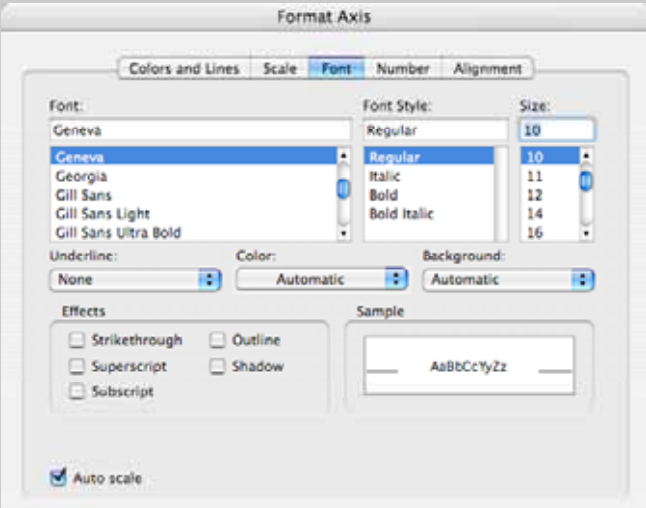


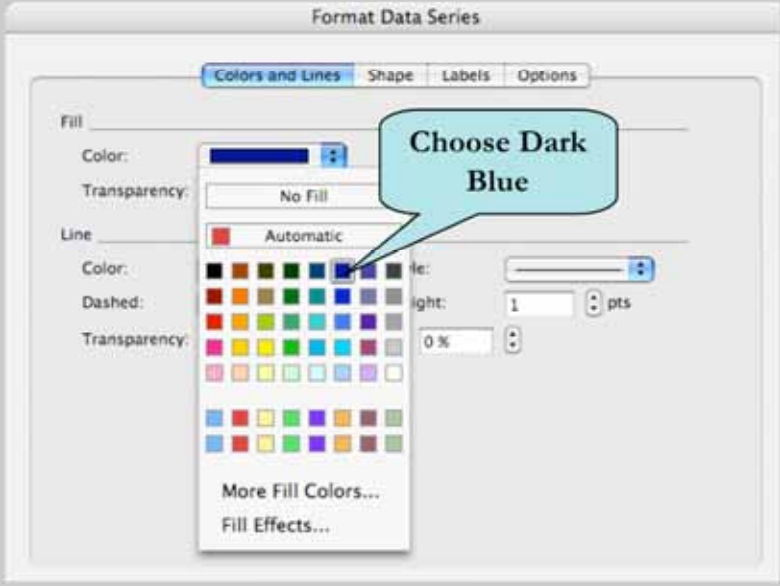
Additionally, you can format the text on your chart (font, color, alignment) and modify the colors and patterns of the graphical data series. **Double-clicking on the chart object** (i.e. x-axis, y-axis, legend, data series bar object, etc.) in the small box that contains chart object that you wish to format will launch the appropriate dialog box.



Let's Try It!

What	Why
1. Double-click on the chart.	Launches the Microsoft Graph program.
2. Select Chart > Chart Options from the menu.	Opens the Chart Options dialog box.
3. Click the Titles tab.	Ensures that Titles options are active.
4. In the Chart Title box, type: Sales by Rep	Enters a title for the chart.
5. In the Category-(X) axis box, type: Year	Enters a title for the X-axis
6. In the Value-(Z) axis box, type: Sales	Enters a title for the Value Z-axis.
 <p>The screenshot shows the 'Chart Options' dialog box with the 'Titles' tab selected. The 'Chart title' field is filled with 'Sales by Rep'. The 'Category (X) axis' field is filled with 'Year'. The 'Value (Z) axis' field is filled with 'Sales'. A preview of a bar chart is shown on the right, with a callout pointing to the horizontal axis labeled 'Horizontal Axis' and another callout pointing to the vertical axis labeled 'Vertical Axis'. The chart has a legend with four entries: 'Horror', 'Brom', 'Lara', and 'Hedrick'.</p>	
7. Click OK .	Closes the Chart Options dialog box.
8. Click anywhere inside the chart in the Graph in MyChart window.	Sets the insertion point inside of the chart.

<u>What</u>	<u>Why</u>
9. Double-click on any of the values on the Value Axis (the vertical axis on the left)	Launches the Format Axis dialog box for that particular axis.
10. Click on the Font tab on top of the Format Axis box..	Switches to Font options.
11. In the Font Size box, select 10 as shown below.	Changes the font size to 10.
	
12. Click on the Color arrow and choose Red from the color palette.	Changes the font color of the Value Axis data to red.
13. Click the Number tab.	Switches to Number options.
14. Choose Currency from the category list box.	Changes the number formatting of the data series to Currency.
15. In the decimal places box, type 0 .	Set the number formatting to no decimal places.
16. Click OK .	Closes the Format Axis dialog box.
17. Double-click on the graphic bar for Browne .	Opens the Format Data Series dialog box for the data series for Browne.

<u>What</u>	<u>Why</u>
18. Click the Color drop-down list under the Fill area.	Displays the Fill Color palette.
19. In the Color Palette , select Dark Blue (sixth column, first row) as shown below.	Changes the bar color for Browne to dark blue.
	
20. Click OK .	Closes the Format Data Series dialog box and applies the options.
21. Double-click on either of the values on the Category (X) Axis (the horizontal axis on the bottom).	Launches the Format Axis dialog box for that particular axis.
22. Repeat steps 10, 11 and 12 .	Changes the font size to 10 and changes the font color to red for the Category Axis.
23. Click OK .	Closes the Format Axis dialog box and applies the settings.
24. Select Graph > Quit & Return to MyChart.doc from the menu.	Closes the Microsoft Graph program and returns to the Word Document.

What

Why

25. Click the **Save** button.

Saves the active document.

EVALUATION ONLY

1.3 Changing a Chart Type

In this lesson, you will learn how to change the chart type of an existing chart in your document.

Word offers several chart types to aid you in communicating different types of information. The option for changing the chart type is located on the **Chart > Chart Type** menu. From there, you can choose from a wide array of chart types. Remember – you need to be in Microsoft Graph to use any of the charting features.

To Change the Chart Type:

1. Double-click the chart to launch Microsoft Graph.
2. Select **Chart > Chart Type** from the menu.
3. Select the desired **Chart Type** and **Chart Sub-Type**.
4. Click **OK**.

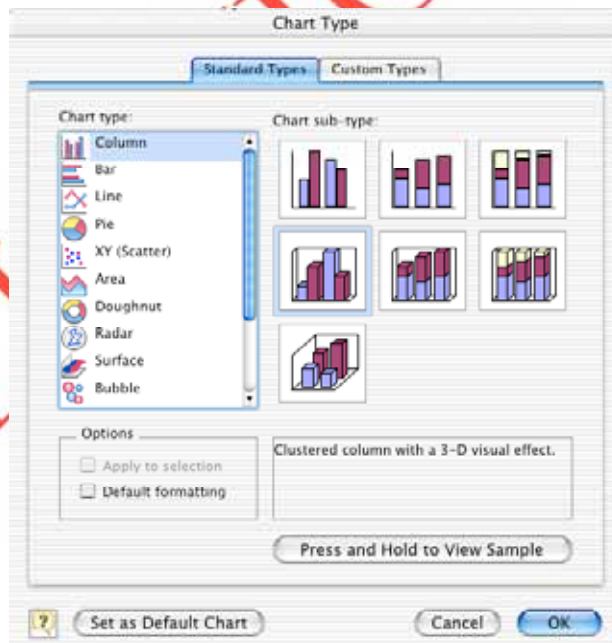
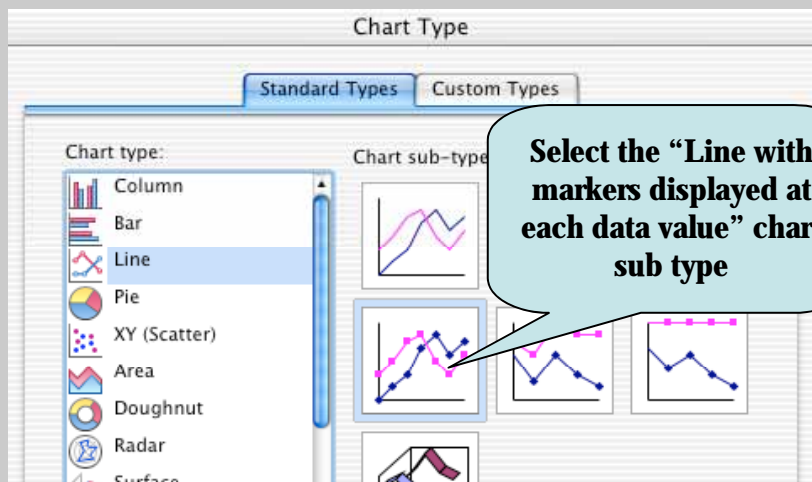


Chart Type dialog box

Let's Try It!

<u>What</u>	<u>Why</u>
1. Double-click the chart.	Launches the Microsoft Graph program.
2. Select Chart > Chart Type from the menu.	Opens the Chart Type dialog box.
3. Under Chart Type , choose Line .	Selects Line Chart as the chart type.
4. Under Chart sub-type , choose the Line with markers displayed at each data value type (first column, second row) as shown below.	Chooses the line with markers displayed at each data value chart sub-type.



5. Click OK .	Closes the Chart Type dialog box and applies the new chart type.
6. Select Chart > Chart Type from the menu.	Opens the Chart Type dialog box.
7. Under Chart Type , choose Bar .	Selects Bar Chart as the chart type.
8. Under Chart sub-type , choose Clustered Bar (1 st row, 1 st	Chooses Clustered Bar as the chart sub-type.

<u>What</u>	<u>Why</u>
column).	
9. Click OK .	Applies the new chart type.
10. Select Graph > Quit and Return to MyChart.doc from the menu.	Closes the Microsoft Graph program and returns to the Word Document.
11. Click the Save button.	Saves the active document.
12. Select File > Close from the menu.	Closes the active document.

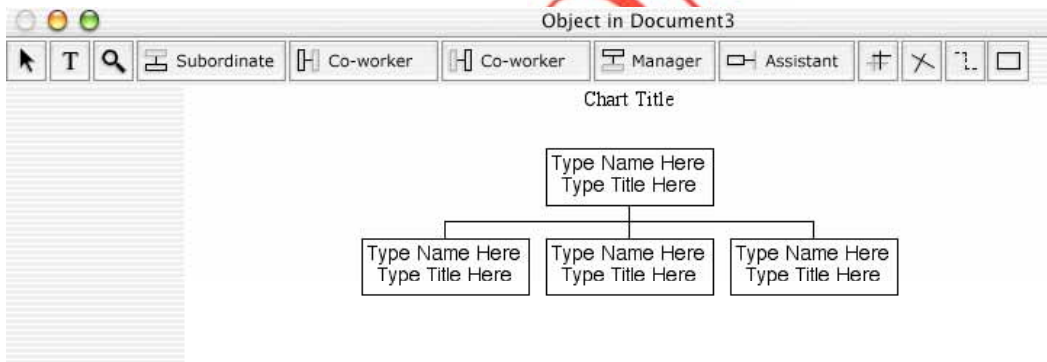
EVALUATION

1.4 Inserting an Organization Chart

In this lesson, you will learn how to insert an Organization Chart into your Word document.

Another feature located under the **Insert** menu is the ability to add an **organization chart** which allows you to illustrate hierarchical relationships such as the structure of a business (i.e. names, titles and departments of managers).

To insert an organization chart in your document, select **Insert > Object** from the menu, and then select **Microsoft Organization Chart** from the Object dialog box. This command will launch the Organization Chart program, which opens in a separate window like the Microsoft Graph program. The default chart consists of one manager with three subordinates, as shown below.

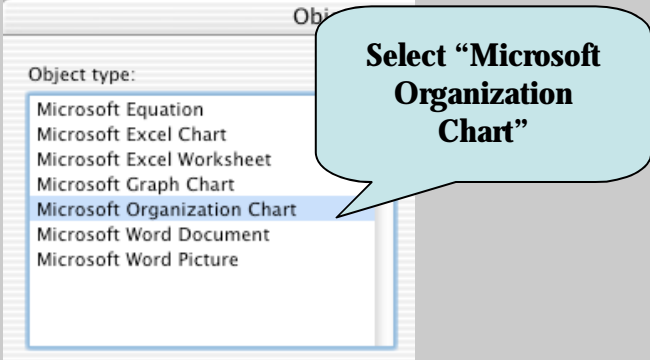
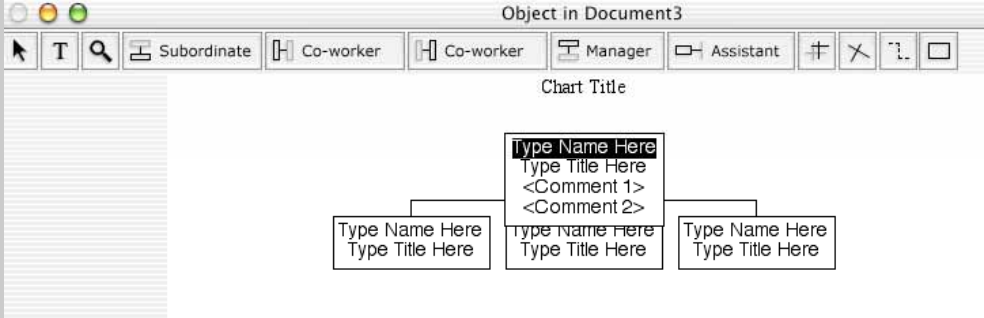


Default Organization Chart

To Insert an Org Chart:

1. Set the insertion point where you wish to insert an organization chart.
2. Select **Insert > Object** from the menu
3. Select the **Microsoft Organization Chart** from the Object dialog box.
4. Click **OK**.
5. Click inside the text box to add the person's name.
6. Press **Enter** to add the person's title.
7. Click in the next shape into which you wish to add data.
8. Click outside of the Organization Chart when finished.

Let's Try It!

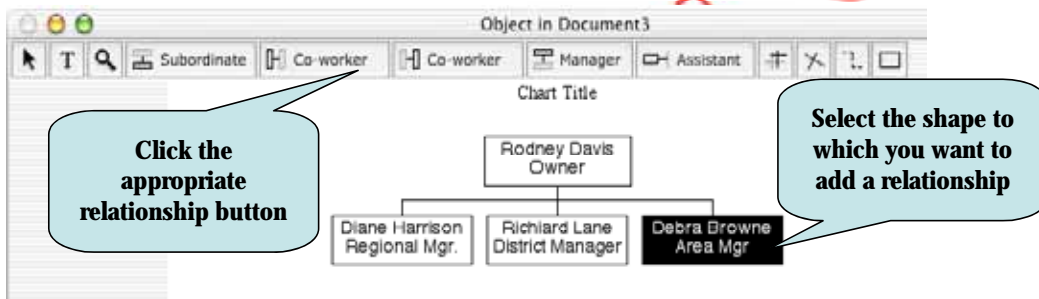
What	Why
1. Click the New Blank Document icon.	Opens a new blank Word document.
2. Select Insert > Object from the menu.	Opens the Object dialog box.
3. Select Microsoft Organization Chart from the Object type list as shown below.	Selects the Organization Chart object.
	
4. Click OK to insert the chart as shown below.	Inserts the Organization Chart into your document and launches the Organization Chart program.
	
5. Type: Rodney Davis	Enters the manager's name into the topmost shape.
6. Press the Return key.	Moves to the Title line.

<u>What</u>	<u>Why</u>
7. Type: Owner .	Enters the manager's title.
8. Click in the leftmost shape on the second row and type: Diane Harrison	Enters the name for the first subordinate.
9. Press the Return key, and then type: Regional Mgr.	Enters the title for the first subordinate.
10. Click in the middle shape on the second row and type: Richard Lane	Enters the name for the middle subordinate.
11. Press the Return key, and then type: District Mgr.	Enters the title for the middle subordinate.
12. Click in the rightmost shape on the second row and type: Debra Browne	Enters the name for the rightmost subordinate.
13. Press the Return key and type: Area Mgr.	Enters the title for the rightmost subordinate.
<pre> graph TD A[Chart Title Rodney Davis Owner] --- B[Diane Harrison Regional Mgr.] A --- C[Richard Lane District Manager] A --- D[Debra Browne Area Mgr.] </pre>	
14. Click outside the shape anywhere on the document.	Deselects the Organization Chart.

1.5 Modifying an Organization Chart

In this lesson, you will learn how to modify the structure of an existing Organization Chart.

After creating your Organization Chart, you can add additional shapes/relationships (or nodes) at any time by clicking on the shape to which you want to add a relationship and then clicking the desired **relationship button** on the Organization Chart Toolbar (coworker, subordinate, assistant). To **delete** a shape/relationship, select the relationship, then press the delete key.



To Add New Shapes/Relationships

1. Click the shape to which you want to add a new shape/relationship.
2. Click the desired **relationship button** on the Organization Chart toolbar.
3. Click in the first shape again to display the new relationship box.
4. Click in new shape to enter text.
5. Select **File > Update and return to [document name]** to close the Organization Chart program and return to your document.

Let's Try It!

What	Why
1. Click the Assistant button on the toolbar.	Establishes an Assistant relationship for the new shape.
2. Click the shape containing the text: Rodney Davis.	Selects the object to which we wish to add an assistant relationship.
4. Type: Paul Hoffman.	Enters the person's name in the new assistant shape.

What	Why
5. Press the Return key and then type: Assistant Mgr.	Enters the person's title in the new assistant shape.
6. Click outside the shape.	Deselects the new shape.
8. Click the Coworker button located to the right of the Subordinate button.	Specifies that we wish to add a new coworker relationship.
7. Click the shape containing the text: Debra Browne.	Adds the new relationship to the Debra Browne node.
10. Type: Stan Darby	Enters the person's name in the new coworker shape.
11. Press the Return key and then type: Area Mgr.	Enters the person's title in the new coworker shape.
12. Select Organization Chart > Quite Organization Chart from the menu.	Displays a dialog box asking us if we want to update the object in our document.
13. Click Update.	Closes the Organization Chart program and updates the chart in our document.
14. Click the Save button.	As we have not yet saved our document, the Save As dialog box is displayed.
15. In the Save as box, type: MyOrgChart.	Provides a name for the document.
16. Click the Save button.	Saves the active document.
17. Select File > Close from the menu.	Closes the active document.

Lesson Summary – Charts and Diagrams

- In this lesson, you learned how to insert a chart into your document using the Insert > Chart command from the menu. You learned that command launches the Microsoft Graph charting program which inserts a default bar chart and a Datasheet complete with sample data. You then enter your own data into the datasheet.
- Then, you learned that the Chart Options dialog box (Chart > Chart Options in the Microsoft Graph application) allows you to format your chart after you have inserted it into your presentation. You learned that you can format the text on your chart (font, color, alignment) and modify the colors and patterns of the graphical data series. Double-clicking directly on the chart object that you wish to format (x-axis, y-axis, legend, data series bar object, etc.) will launch the appropriate dialog box.
- Next, you learned how to change your chart type by selecting Chart > Chart Type from the Microsoft Graph application.
- Next, you learned how to insert an Organization Chart into your documents, allowing you to illustrate hierarchical relationships such as the structure of a business (i.e. names, titles and departments of managers). To insert an Organization Chart into your document, select Insert > Object from the menu, and then select Microsoft Organization Chart from the Object dialog box.
- Lastly, you learned how to add additional shapes/relationships to your Organization Chart by clicking on the desired relationship button on the Organization Chart Toolbar.

Lesson 1 Quiz

1. When inserting a chart into a document, Word launches:
 - A. The Microsoft Table and Chart application.
 - B. The Microsoft Organization Chart application.
 - C. The Microsoft Graph application.
 - D. The Excel Chart application.

2. What is the command to add a chart to your document?

3. To format your chart, you:
 - A. Double-click the chart and select Tools > Chart from the menu.
 - B. Double-click the chart and select Format > Chart Options from the menu.
 - C. Double-click the chart and select View > Format Chart from the menu.
 - D. Double-click the chart and select Chart > Chart Options from the menu.

4. You decide that instead of a column chart, you want to change your chart type to a pie chart. To do this, you:
 - A. Double-click the chart, select Chart > Chart Type from the menu and then select Pie in the Chart Type window.
 - B. Double-click the chart, select Format > Chart Type from the menu and then select Pie in the Chart Type window.
 - C. Double-click the chart, select Tools > Chart Type from the menu and then select Pie in the Chart Type window.
 - D. Select Format > Pie Chart from the menu.

5. Once you have inserted your chart, how can you add data to it?
 - A. Create a table and type in the data.
 - B. Select Insert > Data from the menu and then enter in your data.
 - C. Click on the area of the chart where you wish to add you data and type in your data.
 - D. Replace the sample data in the datasheet with your own.

6. What is an Organization Chart? How do you add one to a document?

7. What formatting options are available from the Chart Options dialog box (select all that apply)
 - A. Changing the chart type

- B. Changing the Chart Title
 - C. Adding category titles
 - D. Changing the axis fonts
8. You want to add a new assistant node (relationship) to the topmost node of your organization chart. How do you accomplish this?
- A. Click the Assistant button on the toolbar, click the topmost node, and then type in the information for the new node.
 - B. Click the topmost node, click the Assistant button on the toolbar and then type in the information for the new node.
 - C. Click the topmost node, click the Coworker button on the toolbar and then type in the information for the new node.
 - D. Click the topmost node, select Insert > Relationship > Assistant from the menu, and type in the information for the new node.

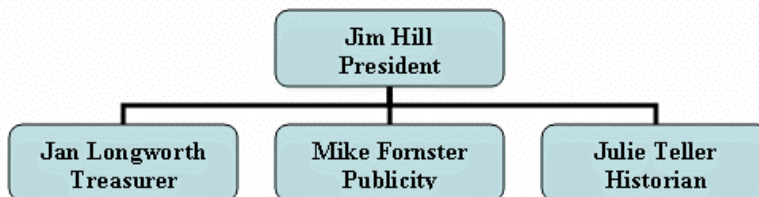
EVALUATION ONLY

LAB 1 – ON YOUR OWN

1. Create a new blank Word document.
2. Select **Insert > Object** and select **Microsoft Graph Chart** from the object type list. Click **OK**.
3. In the datasheet, enter the following data:

	2001	2002
Video Sales	\$495,200	\$626,355
DVD Sales	\$385,000	\$406,222
Video Rentals	\$723,522	\$926,266

4. Double-click the chart to launch Microsoft Graph. Select **Chart > Chart Options** from the menu. Title the chart: **Sales by Year**. In the **Category (X) Axis** box, type: **Year**. In the **Value (Z) Axis** box, type: **Sales**. Click **OK**.
5. With the chart still selected, select **Chart > Chart Type** from the menu and change the chart type to a **Clustered Bar**. Save the document with the name **Lab1_Chart** and close the document.
6. Create a new blank Word document. Select **Insert > Object** from the menu. Choose **Microsoft Organization Chart** from the menu and click **OK**. Enter the data into the Organization Chart as follows:



7. Add an **Assistant** node for **Jim Hill**. Enter the following information into the new node: **Janice Jenkins, Vice-President**.

8. Close the Organization Chart program and return to your Word document.
9. Save the document with the name **Lab1_OrgChart** and close the document.

EVALUATION ONLY

Lesson 2 - Working with Longer Documents

Lesson Topics:

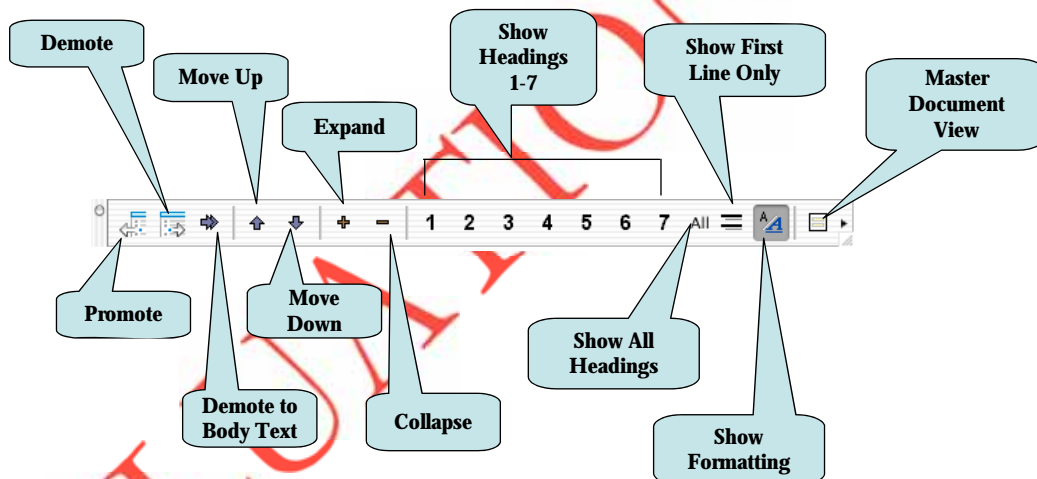
- 2.1 Creating a Document Outline
- 2.2 Creating a Table of Contents
- 2.3 Using Bookmarks
- 2.4 Adding Footnotes and Endnotes
- 2.5 Adding Cross-References
- 2.6 Creating an Index
- 2.7 Working in Notebook Layout
- 2.8 Creating a Master Document
- 2.9 Inserting Subdocuments

2.1 Creating a Document Outline

In this lesson, you will learn how to create a document outline

When working with longer documents, especially those with several chapters or sections, it is often helpful to first create your chapter or section headings then add the detail information later. This enables you to lay out the structure of your document so you can easily see the overall organization of the manuscript, allowing you to make structure changes before it gets too large.

When creating a document outline, you will need to format your outline using one of the **Heading Styles** such as Heading 1, Heading 2, etc. so that when you switch to Outline View, only the headings and subheadings are displayed. Using Word's built-in heading styles also allow you to quickly create a Table of Contents, which we will discuss in the next section.



The Outlining Toolbar

When in **outline view**, enter your headings. Word automatically formats headings as Heading 1 style. To create a subheading, press **Tab** or click the **demote** button on the **Outlining toolbar**. This will indent a main heading and convert it to a subheading. Likewise, you can turn a subheading into a main heading by clicking the **promote** button on the Outlining Toolbar or pressing the **Shift + Tab** keys. You can easily move headings up or down by clicking the **Move Up** or **Move Down** buttons on the Outlining toolbar.

When creating your outline, you will notice **plus** signs next to the main headings and **minus** signs next to the subheadings. **Double-clicking** the plus sign will hide the subheadings. To display the subheadings, double-click the heading plus sign again.


Once you have the structure of your document laid out, the next step is entering your text. To do this, it's easier to switch to Normal or Page Layout view.


To Create an Outline:

1. Select **View > Outline Layout** from the menu.
2. Type your heading and press the **Enter** key.
3. To create a subheading, press **Tab** or click the **Demote** button on the Outlining toolbar.
4. To revert to a higher level heading, press the **Shift + Tab** keys or click the **Promote** button on the Outlining toolbar.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Click the New Blank Document icon.	Opens a new blank document.
2. Select View > Outline from the menu.	Switches to outline view.
3. Type: Chronology and then press Return .	Enters the first main heading.
4. Type: Solitude and then press Return .	Enters the next main heading.
5. Press the Tab key.	Demotes the main heading to a subheading.
6. Type: Serenity and then press Return .	Enters the subheading.
7. Type: Being at Home and then press Return .	Enters the next subheading.
8. Type: Being Alone and then press Return .	Enters the next subheading.
9. Press the Shift + Tab keystroke combination.	Promotes the subheading up one level.
10. Type: Economy and then press Return .	Enters the next main heading.

<u>What</u>	<u>Why</u>
11. Press Tab and type: Serfs of the Soil .	Demotes the heading to a subheading and enters the text for the subheading.
12. Press Return and then type: Credit .	Enters the next subheading.
13. Press Return and then press the Shift + Tab keystroke combination.	Promotes the subheading up one level.
14. Type: Civil Disobedience	Enters the next main heading.
15. Double-click the plus sign to the left of the word Solitude .	Collapses the level, hiding the subheadings.
<div style="text-align: center;"> <p>Double-click plus sign to collapse level.</p>  </div>	
16. Double-click the plus sign to the left of the word Solitude again.	Displays the subheadings.

What	Why
<p>17. Complete the rest of the outline as shown, pressing Tab to promote (indent) the text and Shift+Tab to demote the text.</p>	 <pre> - Chronology¶ + Solitude¶ - Serenity¶ - Being-at-Home¶ - Being-alone¶ + Economy¶ - Serf-of-the-Soil¶ - Credit¶ + Civil-Disobedience¶ - The-Government¶ - The-Church¶ - Individual-Freedom¶ - Visitors¶ + Thoreau's-Journal¶ - Jan-1¶ - Jan-3¶ - Jan-4¶ - Jan-5¶ </pre>
<p>18. Select View > Page Layout from the menu.</p>	<p>Switches to Page Layout view.</p>
<p>19. Click the Save button.</p>	<p>Opens the Save As dialog box.</p>
<p>20. Type: Thoreau Outline in the File name box then click Save.</p>	<p>Saves and names the document.</p>
<p>21. Select File > Close from the menu.</p>	<p>Closes the active document.</p>

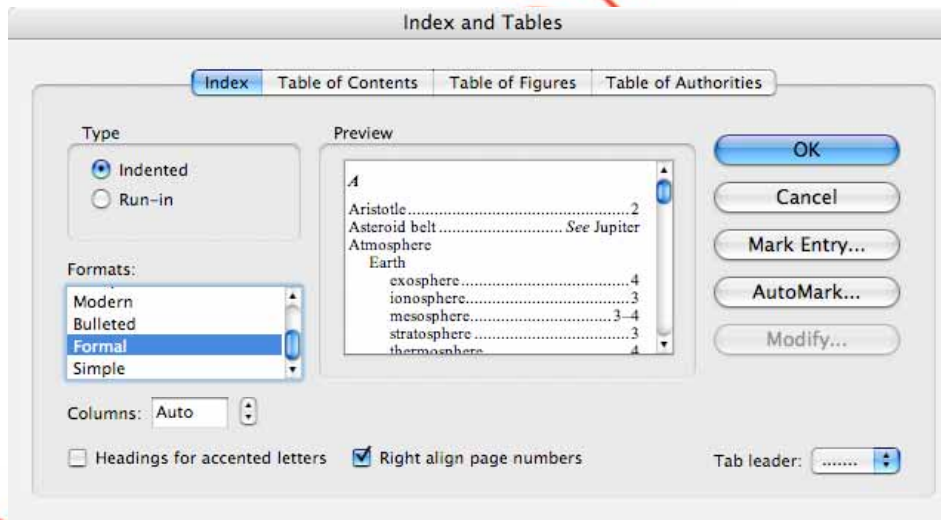
EVAL

2.2 Creating a Table of Contents

In this lesson, you will learn how to create a Table of Contents.

A **table of contents**, which typically is inserted at the beginning of a document, lists all of the headings and subheadings in a document, along with their page numbers. This allows the reader to quickly find the section of a document in which he or she is interested.


If you did not use an outline for your document headings and subheadings, you will first need to apply a heading style such as Heading 1, Heading 2, etc. to all headings and subheadings that you want to be displayed in the Table of Contents. To insert a Table of Contents into your document, select **Insert > Index and Tables** from the menu, click the **Table of Contents** tab, and then select any desired styles and formatting.

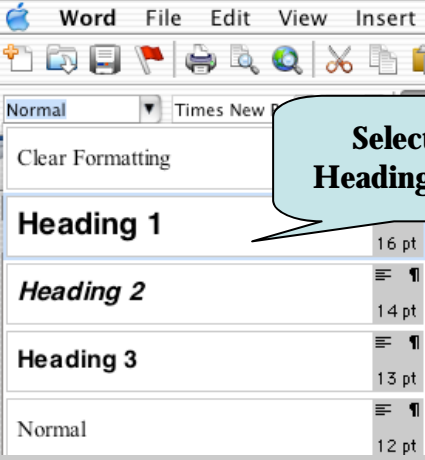


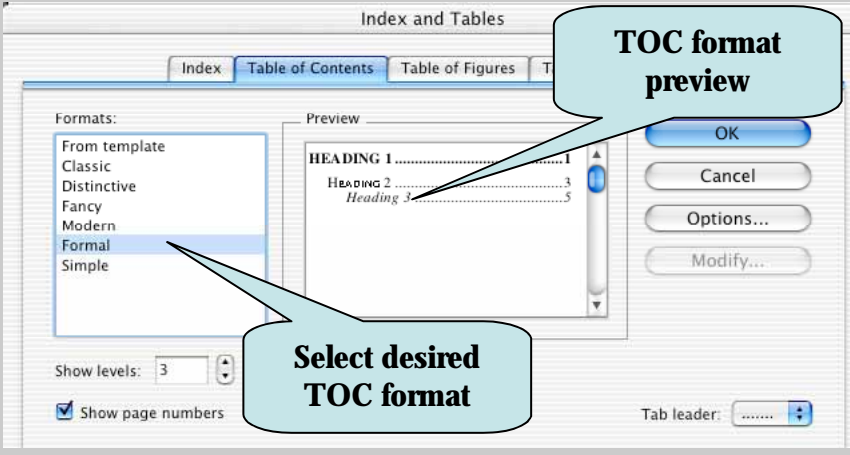
To Create a Table of Contents:

1. Apply a heading style to any heading that you want displayed in the table of contents.
2. Set the insertion point where you wish to insert your table of contents.
3. Select **Insert > Index and Tables** from the menu.
4. Click the **Table of Contents** tab.
5. Select the desired table of contents style from the **Formats** drop-down list.
6. Select any other desired options.
7. Click **OK**.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Select File > Open from the menu.	Launches the Open dialog box.
2. Select Desktop in the Sidebar.	Opens the Desktop folder.
3. Click the Lesson Files folder in the column browser window.	Opens the Lesson Files folder.
4. Click on the file named: Thoreau and then click the Open button.	Opens the Thoreau document.
5. Scroll to page 2 of the document and highlight the word " Chronology ".	Before we can create our table of contents, we will have to apply a heading style to all of our headings and subheadings.
6. Select Format > Style from the menu.	Displays the Styles dialog box.
7. Select Heading 1 in the Styles list box as shown below.	Selects Heading 1 as the style to apply to the selected item.
	
8. Click Apply .	Applies the style to the selected item.
9. On the top of page 3, highlight the heading " Where ".	Selects the text to which we want to apply a style.

<u>What</u>	<u>Why</u>								
<p>I Lived”</p>									
<p>10. Select Heading 1 from the Styles drop-down list as shown.</p>	<p>Applies a Heading 1 style to the selected text.</p> 								
<p>11. Scroll down and highlight the heading: “Solitude”. Choose Heading 1 from the drop-down style list.</p>	<p>Applies a Heading 1 style to the selected text.</p>								
<p>12. Highlight the subheading “Serenity” (directly under the Solitude heading).</p>	<p>Selects the text to which we want to apply a style.</p>								
<p>13. Select Format > Style from the menu and select Heading 2 from the Styles list. Click Apply.</p>	<p>Applies a Heading 2 style to the selected text.</p>								
<p>14. Highlight the next subheading “Being at Home” and choose Heading 2 from the drop-down style list.</p>	<p>Applies a Heading 2 style to the selected text.</p>								
<p>15. Apply a heading styles to the rest of the headings and subheadings in the document as follows:</p> <table border="0" style="width: 100%; text-align: center;"> <thead> <tr> <th data-bbox="483 1661 646 1692"><u>HEADING</u></th> <th data-bbox="938 1661 1044 1692"><u>STYLE</u></th> </tr> </thead> <tbody> <tr> <td data-bbox="492 1709 711 1745">On Being Alone</td> <td data-bbox="959 1709 1105 1745">Heading 2</td> </tr> <tr> <td data-bbox="492 1749 626 1785">Economy</td> <td data-bbox="959 1749 1105 1785">Heading 1</td> </tr> <tr> <td data-bbox="492 1789 703 1824">Serfs of the Soil</td> <td data-bbox="959 1789 1105 1824">Heading 2</td> </tr> </tbody> </table>		<u>HEADING</u>	<u>STYLE</u>	On Being Alone	Heading 2	Economy	Heading 1	Serfs of the Soil	Heading 2
<u>HEADING</u>	<u>STYLE</u>								
On Being Alone	Heading 2								
Economy	Heading 1								
Serfs of the Soil	Heading 2								

<u>What</u>	<u>Why</u>
<p>Credit Civil Disobedience The Government The Church Individual Freedom Visitors Thoreau's Journal Jan 1 Jan 3 Jan 4 Jan 5</p>	<p>Heading 2 Heading 1 Heading 2 Heading 2 Heading 2 Heading 1 Heading 1 Heading 2 Heading 2 Heading 2 Heading 2</p>
<p>16. Scroll up to the second page of the document and set the insertion point at the blank line above Chronology.</p>	<p>Sets the insertion point where we wish to insert our table of contents.</p>
<p>17. Select Insert > Index and Tables from the menu.</p>	<p>Opens the Index and Tables dialog box.</p>
<p>18. Click on the Table of Contents tab.</p>	<p>Switches to table of contents options.</p>
<p>19. From the Formats drop-down list, select Formal as shown below.</p>	<p>Selects the Formal table of contents format.</p>
	
<p>20. Click OK.</p>	<p>Inserts the Table of Contents into our document.</p>

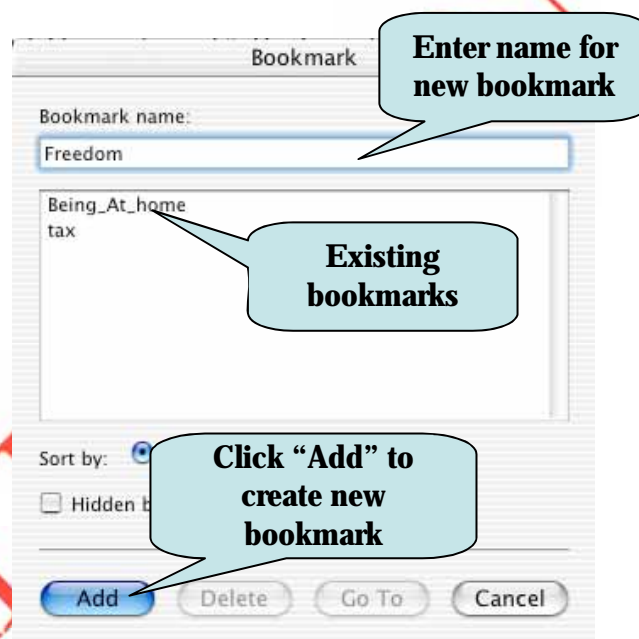
<u>What</u>	<u>Why</u>
21. Select Insert > Break > Page Break from the menu.	Inserts a page break after the Table of Contents.
22. Scroll up and set the insertion point at the blank line above the Table of Contents that you just inserted. Type: Table of Contents	Enters a page heading.
23. Click the Save button.	Saves the current document.

EVALUATION

2.3 Using Bookmarks

In this lesson, you will learn how to use bookmarks to navigate to a specific place in your document.

Bookmarks allow you to quickly jump to a specific place in your document. The concept is similar to a paper bookmark you may use to mark your place while reading a novel. A bookmark marks your location so you can quickly jump to it at a later time. Bookmarks are codes that Word inserts in your document and are not visible on the screen. Creating bookmarks and returning to existing bookmarks are accomplished from the **Insert > Bookmark** command on the menu.



Bookmark Dialog Box

To Create a Bookmark:

1. Set the insertion point where you wish to insert a bookmark.
2. Select **Insert > Bookmark** from the menu.
3. Type a name for the bookmark in the **Bookmark name** box (Note: bookmark names cannot contain spaces)
4. Click **Add**.

To Use a Bookmark:

1. Select **Insert > Bookmark** from the menu.
2. Select the bookmark that you wish to navigate to from the list box.
3. Click **Go To**.
4. Click **Close**.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Scroll to page five of the document and set the insertion point before the heading Being at Home .	Sets the insertion point where we wish to insert a bookmark.
2. Select Insert > Bookmark from the menu.	Opens the Insert Bookmark dialog box.
3. In the Bookmark name box, type: Being_at_home .	Enters the name for the bookmark. As bookmark names cannot contain spaces, we will separate the individual words with an underscore.
4. Click Add .	Inserts the bookmark.
5. Scroll to page 12 of the document and set the insertion point before the heading: Individual Freedom .	Sets the insertion point where we wish to insert a bookmark.
6. Select Insert > Bookmark from the menu.	Opens the Insert Bookmark dialog box.
7. In the Bookmark name box, type: Freedom .	Enters the name for the bookmark.
8. Click Add .	Inserts the bookmark.
9. Select Insert > Bookmark from the menu.	Opens the Insert Bookmark dialog box.
10. Select the Being_at_home bookmark.	Selects the bookmark to which we wish to jump.

<u>What</u>	<u>Why</u>
11. Click the Go To button.	Jumps to the selected bookmark.
12. Click the Close button.	Closes the Bookmarks dialog box.
13. Click the Save button.	Saves the active document.

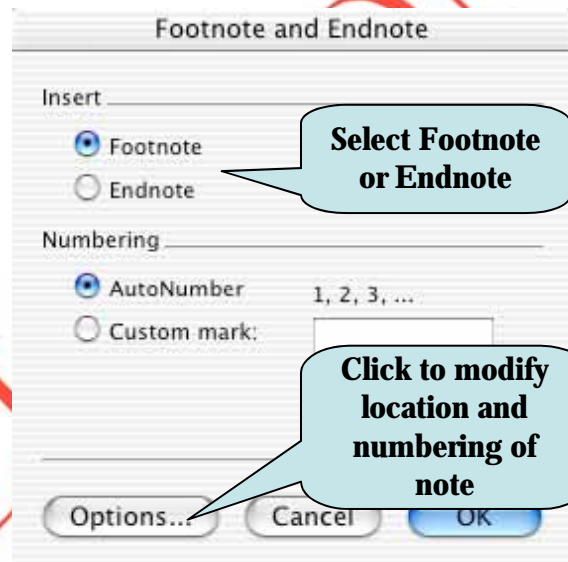
EVALUATION ONLY

2.4 Adding Footnotes and Endnotes

In this lesson, you will learn how to add footnotes and endnotes into your document.

Footnotes are comments that appear at the bottom of the page and are used to provide comments for or to explain text in a document. **Endnotes** appear at the end of the document and are typically used for citations of sources. Microsoft Word automatically numbers your footnotes and endnotes although you have the option of setting the beginning number. You can choose to restart numbering at each section or at each new page.

When viewing a footnote or endnote on your screen, moving your mouse pointer over the footnote number or endnote number in the document text will display a smart tag window that displays the footnote or endnote text. Thus, it is not necessary to scroll to the bottom of the page to view your notes.

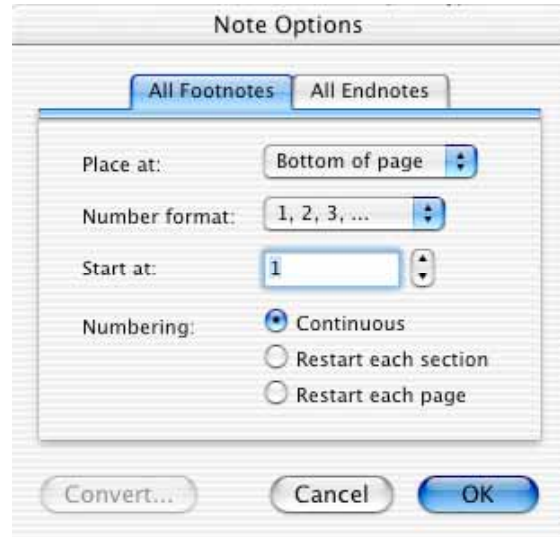


Footnote and Endnote Dialog Box

To Create a Footnote or Endnote

1. Set the insertion point where you wish the footnote or endnote number to appear.
2. Select **Insert > Footnote** from the menu.
3. Choose either **Footnote** or **Endnote**.
4. Click the Options button and then Select any additional options (location of note, number format, etc.) from the **Note Options** dialog box.
5. Click **OK** to close the Note Options dialog box.

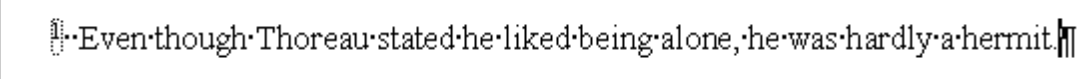
6. Click **OK** to close the Footnote and Endnote dialog box.
7. Enter the text for the footnote or endnote.
8. To delete a footnote or endnote, select the note number and press the **Delete** key.



Note Options dialog Box

Let's Try It!

<u>What</u>	<u>Why</u>
<p>1. Scroll to page six of the document and set the insertion point after the word “time”, the first sentence under the On Being Alone heading as shown below.</p>	<p>Sets the insertion point where we wish to add a footnote.</p>
<p>On-being-alone¶ I find it wholesome to be alone the greater part of the time. To be in company, even with the best, is soon wearisome and dissipating. I love to be alone. I never found the companion that was so companionable as solitude. We are for</p>	<p>Set insertion point where footnote number is to appear</p>
<p>2. Select Insert > Footnote from the menu.</p>	<p>Opens the Footnote and Endnote dialog box.</p>

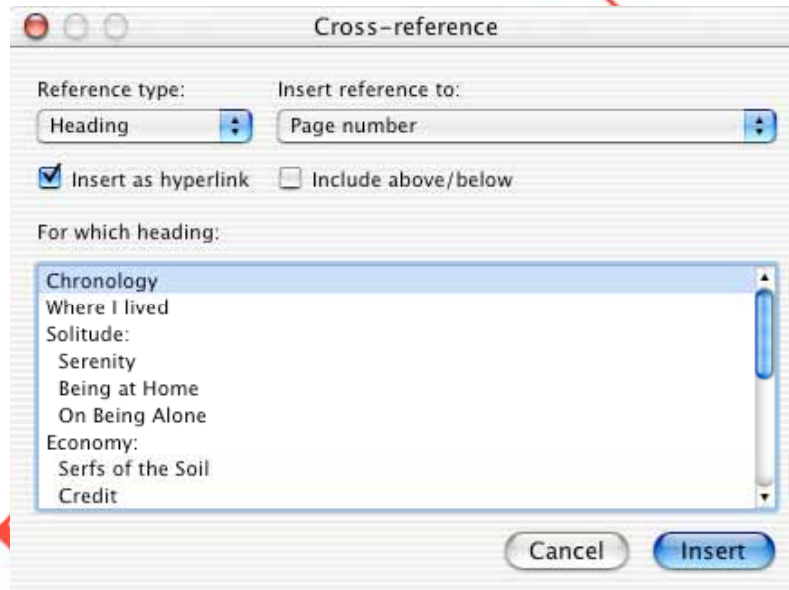
<u>What</u>	<u>Why</u>
3. Ensure that the Footnote radio button is selected.	Sets the option to insert a footnote into our document.
4. Click the Options button.	Opens the Note Options dialog box.
5. Ensure that Bottom of Page is selected in the Place at: drop-down box.	Designates that the footnote text will be placed at the bottom of the page.
6. Click OK .	Closes the Note Options dialog box.
7. Click OK .	Closes the Footnote and Endnote dialog box.
8. Type in the following text in the footnote window at the bottom of the page:	
	
9. Click the Print Preview button and observe the footnote.	Views the document in print preview mode. Notice the footnote at the bottom of the page.
10. Click the Close button.	Returns to edit mode.
11. Click the Save button.	Saves the active document.

EVAL

2.5 Adding Cross-References

In this lesson, you will learn how to reference an item located elsewhere in your document.

A **Cross-reference** refers the reader to an object such as a table, a figure, etc. that appears in another location in a document. An example of a cross-reference would be: **“For more information, see Table 3.4 on page 48.”** Rather than type the page number in yourself, Word will automatically **update the number**. Should you add, rearrange or delete pages from your document, the page number will automatically be changed to reflect the new position of the pages in the document. You can create cross-references to headings, figures, bookmarks, captions, numbered paragraphs, tables, and footnotes or endnotes.



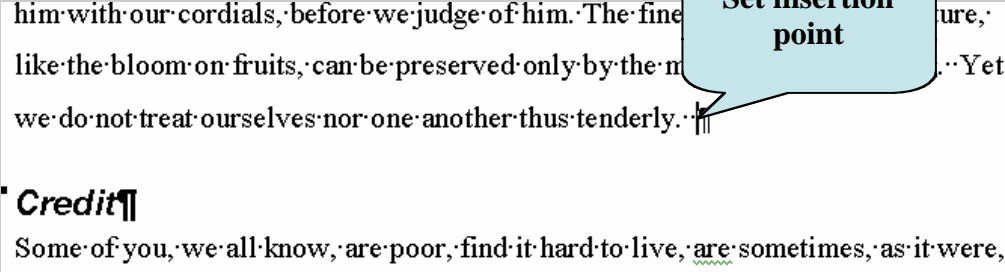
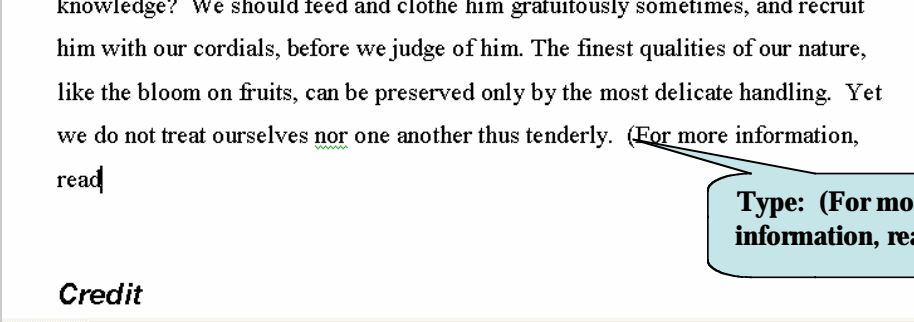
Cross Reference Dialog Box

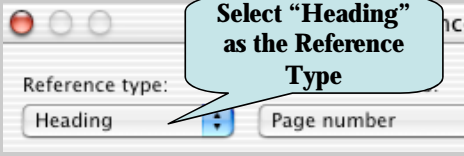
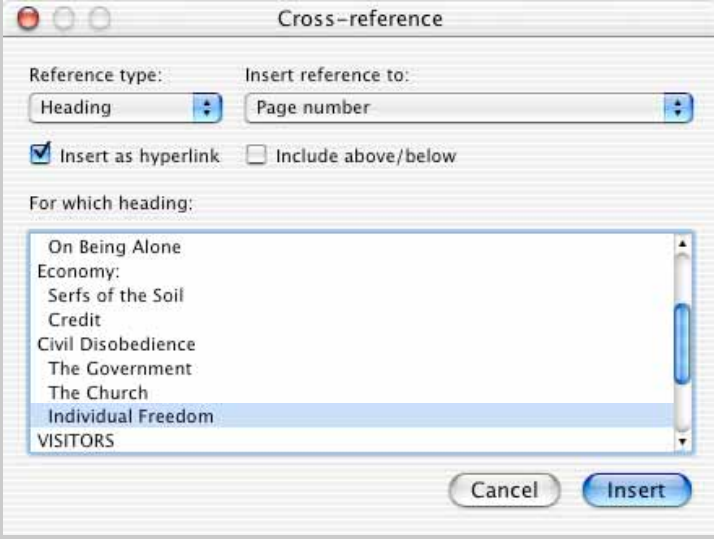
To Add a Cross-Reference to a Document

1. Set the insertion point where you wish to insert the cross-reference code.
2. Select **Insert > Cross-reference** from the menu.
3. Select the item that you wish to reference from the **Reference Type** drop-down box.
4. In the **For which [Reference Type]:** list box, choose the item you wish to cross-reference.
5. Select the type of cross-reference to be displayed from the **Insert reference to:** drop-down box.

6. Select any additional options if desired.
7. Click the **Insert** button.
8. Click the **Close** button.

Let's Try It!

<u>What</u>	<u>Why</u>
<p>1. Scroll to page eight of the document and set the insertion point after the word “tenderly”, the last sentence of the paragraph preceding the Credit heading as shown below.</p>	<p>Sets the insertion point where we wish to insert a cross reference.</p>
 <p>him with our cordials, before we judge of him. The finest qualities of our nature, like the bloom on fruits, can be preserved only by the most delicate handling. Yet we do not treat ourselves nor one another thus tenderly.</p> <p>Credit</p> <p>Some of you, we all know, are poor, find it hard to live, are sometimes, as it were,</p>	
<p>2. Press the spacebar twice.</p>	<p>Inserts two spaces after the last sentence.</p>
<p>3. Type the following text: (For more information, read as shown below, and then press the spacebar.</p>	<p>Enters text for the cross-reference.</p>
 <p>knowledge? We should feed and clothe him gratuitously sometimes, and recruit him with our cordials, before we judge of him. The finest qualities of our nature, like the bloom on fruits, can be preserved only by the most delicate handling. Yet we do not treat ourselves nor one another thus tenderly. (For more information, read</p> <p>Credit</p>	
<p>4. Select Insert > Cross-reference from the menu.</p>	<p>Opens the Cross-reference dialog box.</p>

What	Why
<p>5. From the Reference type drop-down list, choose Heading as shown.</p>	<p>Chooses heading as the type of object we will cross-reference.</p> 
<p>6. In the For which heading window, scroll down and select Individual Freedom as shown below.</p>	<p>Chooses that actual object that we will cross-reference.</p>
	
<p>7. From the Insert reference to: drop-down list, choose Heading text.</p>	<p>Chooses heading text as the code that we will insert into our document as a cross-reference. The actual text of the heading will be inserted.</p>
<p>8. Click the Insert button.</p>	<p>Inserts the cross-reference code.</p>
<p>9. Click the Close button.</p>	<p>Closes the Cross-reference dialog box.</p>
<p>10. Press the Spacebar and type: on page then press the Spacebar again.</p>	<p>Enters additional text for our cross-reference.</p>

<u>What</u>	<u>Why</u>
11. Select Insert > Cross-reference from the menu.	Opens the Cross-reference dialog box.
12. From the Reference type drop-down list, choose Heading .	Chooses heading as the type of object we will cross-reference.
13. In the For which heading window, scroll down and select Individual Freedom .	Chooses that actual object that we will cross-reference.
14. From the Insert reference to: drop-down list, choose Page number .	Chooses page number as the code that we will insert into our document as a cross-reference. The page number of the Individual Freedom heading will be inserted.
15. Click the Insert button.	Inserts the cross-reference code.
16. Click the Close button.	Closes the Cross-reference dialog box.
17. Type:) as shown below.	Enters the closing parenthesis for the cross-reference.
<p style="text-align: center;">we do not treat ourselves nor one another thus tenderly. (For more information, read Individual Freedom on page 12)</p>	
18. Click the Save icon.	Saves the active document.

EVAL

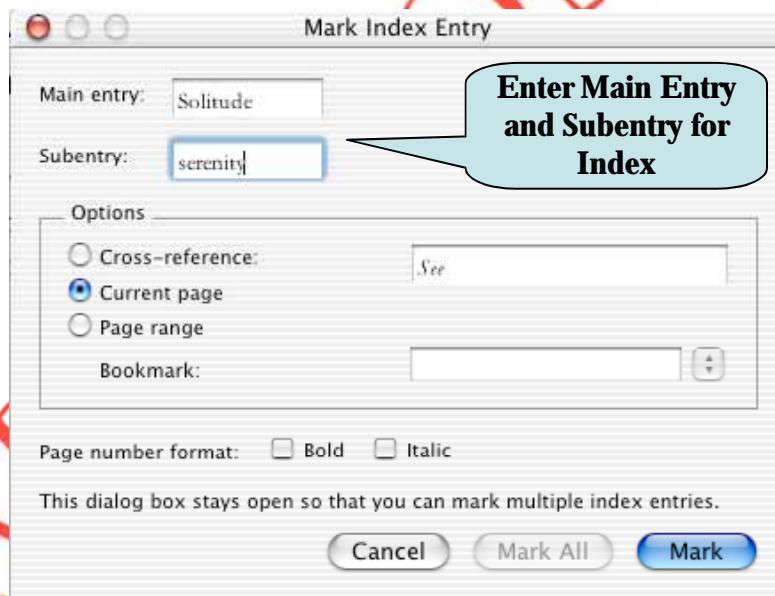
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2.6 Creating an Index

In this lesson, you will learn how to create an index at the end of your document.

An **index** is a list of key terms and topics along with their page numbers, typically located at the end of the document. An index allows your readers to locate significant information quickly.

Before creating an index, you must first mark the index entries in your document. Once all desired index entries are marked, you then generate your index. To mark an entry, set the insertion point at the desired entry and then press the **⌘ + Option + Shift + X** keystroke combination. When the **Mark Index Entry** dialog box appears, enter the desired **Main entry** heading and a **subentry** heading for the index. Once you mark an index entry, Word adds a special XE (Index Entry) field to your document which is only visible when the Show/Hide button is activated. Add any additional index options and/or formatting as desired.



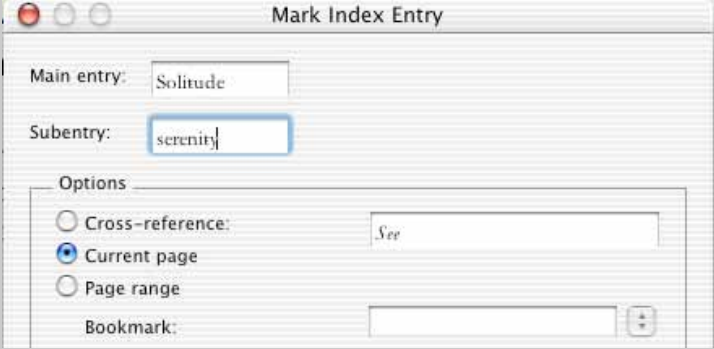
Mark Index Entry Dialog Box

After you've marked all the index entries that are to be included in your index, choose an index format, and then build the actual index. Word will assemble all of the marked index entries, sort them alphabetically, reference their page numbers, and display the index in the document.


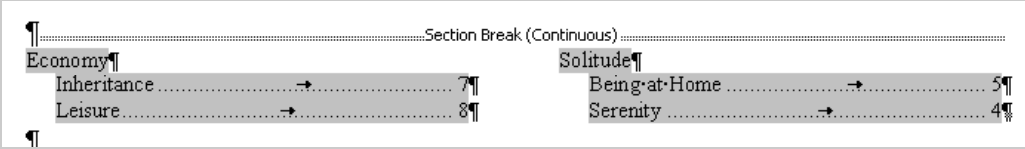
To Create an Index

1. Set the insertion point to where you wish the index to refer.
2. Press the **⌘ + Option + Shift + X** keystroke combination to mark the entry.
3. Repeat steps 1 and 2 until all desired entries are marked.
4. Set the insertion point where you wish the index to appear.
5. Select **Insert > Index and Tables** from the menu.
6. Click the **Index** tab.
7. Choose the desired index style from the **Formats** drop-down list.
8. Choose any other desired options.
9. Click **OK** to generate the index.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Scroll to page four of the document and set the insertion point after the word "Serenity."	Sets the area to where we want the index to refer.
2. Press the ⌘ + Option + Shift + X keystroke combination.	Opens the Mark Index Entry dialog box.
3. In the Main entry box, type: Solitude as shown below.	Enters the main index heading.
	
4. In the Subentry box, type: Serenity as shown above.	Enters the subentry index heading.
5. Click Mark .	Marks the index entry. The Mark Index Entry dialog box will remain open, allowing you to mark additional entries.

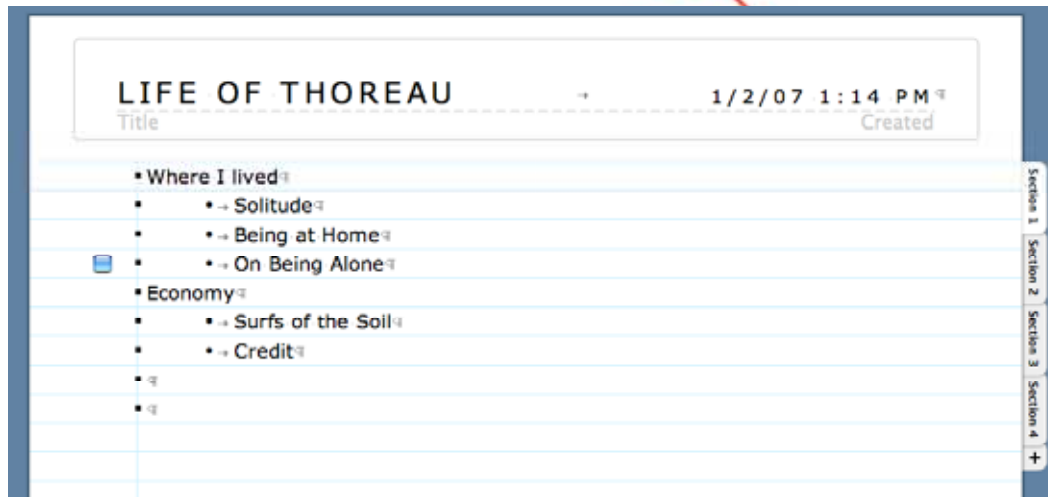
<u>What</u>	<u>Why</u>
6. Click after the heading “Being at Home” on page five .	Sets the area to where we want the index to refer.
7. In the Main entry box, type: Solitude .	Enters the main entry index heading.
8. In the Subentry box, type: Being at home .	Enters the subentry index heading.
9. Click Mark .	Marks the index entry.
10. Scroll to page seven of the document and set the insertion point after the heading Serfs of the Soil .	Sets the area to where we want the index to refer.
11. In the Main entry box, type: Economy .	Enters the main entry index heading.
12. In the Subentry box, type: Inheritance .	Enters the subentry index heading.
13. Click Mark .	Marks the index entry.
14. Set the insertion point anywhere on page eight .	Sets the area to where we want the index to refer.
15. In the Main entry box, type: Economy .	Enters the main entry index heading.
16. In the Subentry box, type: Leisure .	Enters the subentry index heading.
17. Click Mark .	Marks the index entry.
18. Click the Close button.	Closes the Mark Index Entry dialog box.
19. Scroll to the last page of the document and set the insertion	Sets the insertion point where we wish to insert our index.

What	Why
point at the last blank line.	
20. Select Insert > Break > Page Break from the menu.	Inserts a page break so our index will appear on its own page.
21. Select Insert > Index and Tables from the menu.	Opens the Index and Tables dialog box.
22. Click the Index tab.	Switches to index options.
23. Select Classic from the Formats drop-down list.	Selects the style of the index.
24. Check the box next to Right align page numbers .	Ensures that the page numbers will be right-aligned on the page.
25. From the Tab leader drop-down list, choose the dotted-line leader (2 nd option in list) as shown.	Selects the type of tab leader. 
26. Click OK and observe the index.	Inserts the index at the insertion point.
	
27. Select File > Close from the menu. Save any changes.	Saves and closes the current document.

2.7 Using Notebook Layout

In this lesson, you will explore Word's new Notebook layout view.

New in Microsoft Word 2004 is **Notebook Layout**, a new view that can help you to organize your data, as well as capturing your thoughts, ideas or tidbits in an easy-to-use format. Notebook layout allows you to store your information in separate categories by creating section tabs. In addition, entries you make in your document are in an outline-like structure. New notes are entered at the highest-level outline and you can indent (pressing the Tab key) to create a next level outline. As in outline view, you can collapse your outline to display only top-level headings.



Notebook Layout View


Other features include the ability to draw free-form images in your document using the **Scribble tool**, record audio while taking notes and flag items with **note flags**.

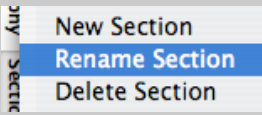
To Use Notebook Layout

1. Select **View > Notebook Layout** from the menu. If prompted, click **Create New** to create a new document or click **Convert** to convert the existing document to Notebook Layout format.
2. To **promote** or **demote** items, click the Promote or Demote buttons on the Formatting Palette or press Tab to demote and Shift + Tab to promote items.
3. To add a new divider, click the **plus (+) symbol** beneath the section tabs.
4. To **rename** a section tab, ctrl + click on the tab and select **Rename Section** from the pop-up menu. Type in the new name.

5. To use the **Scribble tool**, click the Scribble tool icon on the toolbar and draw your object on the document. To specify pen point and color, click the drop-down arrow next to the Scribble tool icon.
6. To remove a scribble object, click the **Eraser** tool on the toolbar and then click the object. Click the Eraser tool again to deactivate it.
7. To add a **Note Flag**, select the desired text and then click the Note Flag icon on the **Formatting Palette**.
8. To create an Entourage task from a note, select the desired note and then click the **Create Entourage Task** button. Modify the reminder times and task title if desired.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Click the New Blank Document button.	Opens a new blank documents.
2. Select View > Notebook Layout from the menu.	Displays the new document in Notebook Layout view.
3. Type: Where I Lived and then press Return.	Enters our first note at the top outline level and inserts a new line at the same level.
4. Type: Solitude	Enters text on the new line.
5. If the Formatting Palette is not visible, select View > Formatting Palette from the menu.	Displays the Formatting Palette.
6. In the Note Levels area of the Formatting Palette, click the Demote button as shown.	Indents the line to the next level. 
7. Press Return .	Creates a new line, beginning at the same outline level as the previous line.
8. Type: On Being Alone and then press Return .	Enters text on the new line and creates a new line at the same outline level as the

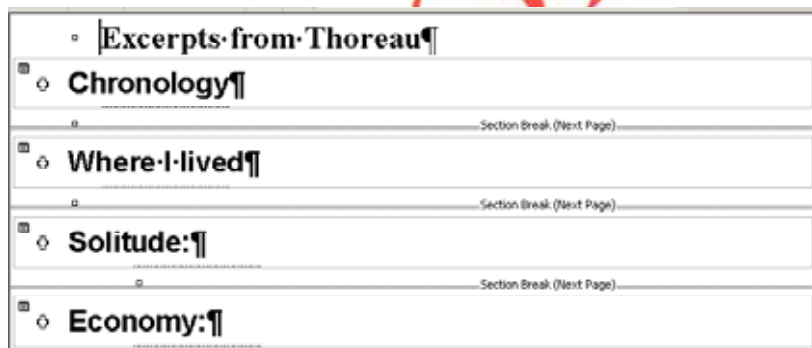
<u>What</u>	<u>Why</u>
	previous line.
9. In the Note Levels area of the Formatting Palette, click the Promote button.	Promotes the new line one level up.
10. Type: Economy	Enters text on the new line at the highest level.
11. Click the Section 2 tab as shown below.	Switches to the Section 2 category. New documents are created with three default sections.
12. Type: Biography of Thoreau.	Enters text in the Section 2 category.
13. Ctrl + Click on the Section 2 tab and select Rename Section from the pop-up menu as shown.	Allows us to rename the section to something more meaningful. 
14. Type: Biography	Renames the Section 2 tab to Biography.
15. Click the plus (+) symbol below the Section 3 tab.	Inserts a new section and makes it the active section.
16. Select File > Save from the menu. Type: My_Notebook in the Save as box. Click Save .	Saves the document with the name "My_Notebook".
17. Select File > Close from the menu.	Closes the document.

2.8 Creating a Master Document

In this lesson, you will learn how to create a master document

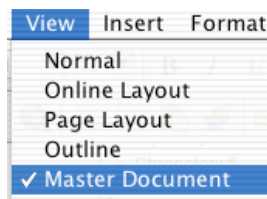
Large documents can be sometimes clumsy to work with due to their sheer size. Microsoft Word's **master document** feature allows you to divide up your document into more manageable units called **subdocuments**. Each subdocument is its own file, which makes working on a document with several other people more manageable as well.

The master document is a container for your subdocuments. The subdocuments are not actually stored in the master document but rather the master document contains links to the subdocument files. Working with the organization of the master document is done in **Master Document view**. Once in Master Document view, you can then rearrange the order of the subdocuments, modify the subdocuments and even remove subdocuments from the master document.



To Create a Master Document

1. Start with a new blank document.
2. Select **View > Master Document** from the menu.



3. Type the title for the master document.
4. Press **Return**

Let's Try It!

<u>What</u>	<u>Why</u>
1. Click the New Blank Document button.	Opens a new blank documents.
2. Select View > Master Document from the menu.	Switches to Outline View.
3. Type: Excerpts from Thoreau	Enters the title for master document.
4. Press Enter .	Inserts a new heading.
5. Select File > Save As from the menu.	Opens the Save As dialog box.
6. In the Save As box, type: Thoreau Master	Enters a file name for the master document.
7. Click Save .	Saves the document.

EVALUATION

2.9 Inserting Subdocuments into a Master Document

In this lesson, you will learn how to insert subdocuments into a master document.

Once you have created your master document, you will next want to insert your subdocuments into it. There are two ways to do this— either create a new subdocument and enter all the text, graphics, etc. for the document or use an existing file. Even if you create a new subdocument, it will be saved as a separate file. To insert subdocuments into your Master Document, you will need to be in **Master Document** view (**View > Master Document** from the menu). After you have inserted your subdocuments, double-clicking on the plus sign next to the subdocument heading will expand and collapse that subdocument.

To Create a New Subdocument

1. Open the master document.
2. Select **View > Master Document** from the menu.
3. Set the insertion point where you wish to create a new subdocument.
4. Click the **Create Subdocument** icon on the **Master Document** toolbar.



Create Subdocument icon

5. Enter desired headings and text for subdocument.
6. Click the **Save** button.

To Insert an Existing Document as a Subdocument

1. Open the master document.
2. Select **View > Master Document** from the menu.
3. Set the insertion point where you wish to insert the existing subdocument.
4. Click the **Insert Subdocument** icon on the **Master Document** toolbar.

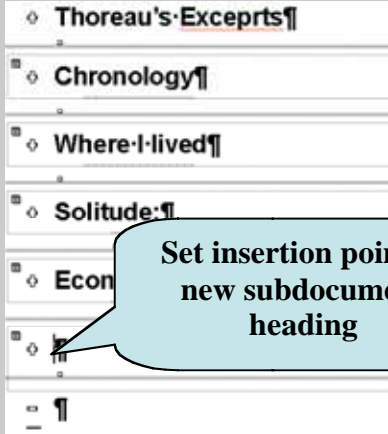



Insert Subdocument icon

5. Click the **Save** button.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Press Return .	Moves to a new line in your document.
2. Click the Insert Subdocument icon on the Master Document Toolbar as shown.	Opens the Insert Subdocument dialog box. 
3. Highlight the Sub1 document and then click Open .	Adds the Sub1 document into the master document.
4. Click the Insert Subdocument icon.	Opens the Insert Subdocument dialog box.
5. Highlight the Sub2 document and then click Open .	Adds the Sub2 document into the master document.
6. Click the Insert Subdocument icon.	Opens the Insert Subdocument dialog box.
7. Highlight the Sub3 document and then click Open .	Adds the Sub3 document into the master document.
8. Click the Insert Subdocument icon.	Opens the Insert Subdocument dialog box.
9. Highlight the Sub4 document and then click Open .	Adds the Sub4 document into the master document.
10. Click the Insert Subdocument icon.	Opens the Insert Subdocument dialog box.
11. Highlight the Sub5 document and then click Open .	Adds the Sub5 document into the master document.
12. Click the Heading 1 button on the Outlining Toolbar as shown.	Only displays the Heading 1 Titles. 

<u>What</u>	<u>Why</u>
13. Click the Create Subdocument icon.	Inserts a heading for the new subdocument.
14. Set the insertion point at the new subdocument heading and type: Thoreau's Journal as shown.	<p>Enters the heading text for the subdocument.</p> 
15. Press Return .	Inserts a heading for the new subdocument.
16. Press Tab .	Demotes the heading.
17. Type: Jan 1	Enters the level 2 heading.
18. Double-click on the plus sign next to Solitude .	Expands the Solitude subdocument.
19. Double-click again on the plus sign next to Solitude .	Collapses the Solitude subdocument.
20. Double-click on the icon to the left of the plus sign next to Solitude .	Opens the Solitude document (Sub3) in its own window.
21. Select File > Close from the menu.	Closes the Sub3 document.
22. Click the Save icon.	Saves the master document changes.

<u>What</u>	<u>Why</u>
23. Select File > Close from the menu.	Closes the master document.
24. Select File > Open from the menu, highlight the Thoreau Master file, and then click the Open button.	Opens the master document. Notice that when we reopened the master document, the subdocuments are no longer open but are represented by a link.
25. Click on the first link .	Opens the subdocument in a separate window.
26. Select File > Close from the menu.	Closes the subdocument.
27. Click the Expand Subdocuments icon on the Master Document toolbar as shown.	Opens all subdocuments, allowing you to work with your subdocuments in the master document window. <div style="text-align: center; margin: 10px 0;">  </div> <p style="text-align: center;">Expand Subdocuments icon</p>
28. Select File > Close from the menu. Save any changes.	Saves and closes the master document.

EVALUATION

Lesson Summary – Working with Longer Documents

- In this lesson, you learned how to work in Outline layout by selecting View > Outline from the menu. You learned about Heading Styles and how to promote and demote text from the Outlining toolbar.
- Then, you learned how to insert a Table of Contents into your document using the Insert > Index and Tables command. You learned if you did not use an outline for your document headings and subheadings, you will first need to apply a heading style such as Heading 1, Heading 2, etc. to all headings and subheadings that you want to be displayed in the Table of Contents.
- Next, you learned how to insert a bookmark using the Insert > Bookmark command. You learned that bookmarks are codes that Word inserts into your documents, marking your location so that you can quickly jump to the marked location at a later time.
- Next, you learned how to add Footnotes and End notes into your documents using the Insert > Footnote command from the menu and then choosing either the Footnote or the Endnote radio button. You learned that footnotes are comments that appear at the bottom of the page and are used to provide comments for or to explain text in a document. Endnotes appear at the end of the document and are typically used for citations of sources.
- Next, you learned how to insert cross-references by using the Insert > Cross-reference command from the menu. You learned that cross-references refer the reader to an object such as a table, a figure, etc. that appears in another location in a document.
- Next, you learned how to create an index at the end of your document using by the Insert > Index and Tables and then selecting the Index tab. You learned that before creating an index, you must first mark the index entries in your document. To mark an entry, set the insertion point at the desired entry and then press the **⌘** + Option + Shift + X keystroke combination.
- Next, you learned how to work in Word's new Notebook Layout, which allows you to organize and store your information in separate categories by creating section tabs. To switch to Notebook Layout, select View > Notebook Layout from the menu.
- Next, you worked with Word's master document feature, which allows you to divide up your document into more manageable units called

subdocuments. Each subdocument is its own file, which makes working on a document with several other people more manageable as well. To switch to Master Document view, select View > Master Document from the menu.

- Lastly, you learned how to insert subdocuments into a master document by either creating a new subdocument (clicking the Create Subdocument icon) and entering all the text, graphics, etc. for the document or inserting an existing file (clicking the Insert Subdocument icon) into the master document.

EVALUATION ONLY

Lesson 2 Quiz

1. To create a document outline, you:
 - A. Select Insert > Outline from the menu.
 - B. Select View > Notebook Layout from the menu.
 - C. Select View > Outline from the menu.
 - D. Select Tools > Outline from the menu.

2. When working in Outline view, what does the Shift + Tab keystroke combination accomplish?
 - A. Promotes a heading
 - B. Demotes a heading
 - C. Collapses the outline, showing only Level 1 headings.
 - D. Expands the outline

3. You are working in outline view and wish to collapse your outline so that only the top level headings are visible. How can you accomplish this?
 - A. Select View > Collapse Outline
 - B. Select View > Collapse Outline to Level 1
 - C. Select View > Collapse Outline to Level 2
 - D. Select View > Collapse Outline to Level 3

4. What is the command to insert a table of contents into your document?
 - A. Insert > Tables > Table of Contents
 - B. Insert > Table of Contents
 - C. Tools > Insert > Table of Contents
 - D. Insert > Index and Tables

5. Before inserting a Table of Contents, what must you do first?
 - A. Save the document in TOC format.
 - B. Apply a heading style to all headings you want included in the Table of Contents.
 - C. Collapse the outline so that only headings are visible.
 - D. Remove any headings styles from those headings you want included in the Table of Contents.

6. What is a bookmark? How do you insert one?
 - A. A bookmark is a mark in a document that allows you to quickly find a specific location in the document. To insert a bookmark, select Insert > Bookmark > Add Bookmark.
 - B. A bookmark is a mark in a document that allows you to quickly find a specific location in the document. To insert a bookmark, select Insert > Bookmark > Add Bookmark to Selection.
 - C. A bookmark is a mark in a document that allows you to quickly find a specific location in the document. To insert a bookmark, select Insert > Bookmark > Add Bookmark to Page.
 - D. A bookmark is a mark in a document that allows you to quickly find a specific location in the document. To insert a bookmark, select Insert > Bookmark > Add Bookmark to Document.

7. What is the difference between a Footnote and an Endnote?
 - A. Endnotes appear at the bottom of the page and are used to provide comments for or to explain text in a document whereas Footnotes appear at the end of the document and are typically used for citations of sources.
 - B. Endnotes appear at the end of the document and are typically used for citations of sources whereas Footnotes appear at the bottom of the page and are used to provide comments for or to explain text in a document.
 - C. Endnotes appear at the end of the document and are typically used for citations of sources whereas Footnotes appear at the bottom of the page and are used to provide comments for or to explain text in a document.
 - D. Endnotes appear at the bottom of the page and are used to provide comments for or to explain text in a document whereas Footnotes appear at the end of the document and are typically used for citations of sources.

- B. Footnotes appear at the bottom of the page and are used to provide comments for or to explain text in a document whereas Endnotes appear at the end of the document and are typically used for citations of sources.
- C. Footnotes appear at the top of every page whereas Endnotes appear at the bottom of every page.
- D. Footnotes are visible in normal view whereas Endnotes are only visible in outline view.
8. What are the advantages of using cross-references (Select all that apply)?
- A. Cross-references allow you to create tabs to organize your data
- B. Cross-references allow you to break up your documents into more manageable unit.
- C. Should you add, rearrange or delete pages from your document, the page number will automatically be changed to reflect the new position of the pages in the document.
- D. You can create cross-references to headings, figures, bookmarks, captions, numbered paragraphs, tables, and footnotes or endnotes.
9. What is the command to mark an entry for insertion into an Index?
- A. ⌘ + Alt + Shift + X
- B. ⌘ + Option + Shift + X
- C. ⌘ + Option + Shift + M
- D. Ctrl + Option + Shift + X
10. You want to organize your data into separate sections using tabs. How can you accomplish this?
- A. Select Tools > Organize > Tabs from the menu.
- B. Switch to Tab Layout view.
- C. Switch to Notebook layout view.
- D. Switch to Subdocument view.
11. Any changes that you make in a subdocument file will not be reflected in the master document.
- A. True
- B. False
12. When you open a master document:
- A. All subdocuments will be opened as well.
- B. Links to the subdocuments will appear in the master document.
- C. All subdocuments will appear as a tiny icon in the master document.
- D. Word will prompt you for the locations of your subdocuments and ask you if you wish to update any changes.

LAB 2 – ON YOUR OWN

1. Open the Lab2 exercise file.
2. Switch to **Outline View**. Set the insertion point at end of the word **Overtime**. Press **Enter**, and then press **Tab**. Type: **Scope**. Press Enter. Type the rest of the outline as shown below (Hint: press the Tab key to promote and press Shift + Tab to demote)

◊	RATES-OF-PAY¶
-	HOURLY-WAGE-SCHEDULE¶
-	SHIFT-DIFFERENTIALS¶
-	COST-OF-LIVING-ADJUSTMENT¶
◊	OVERTIME¶
-	SCOPE¶
-	WEEKEND-OVERTIME¶
-	CONDITIONS-OF-OVERTIME¶
-	¶
◊	VACATIONS¶
-	ELIGIBILITY¶
-	LENGTH-OF-VACATION¶
-	SCHEDULING-VACATIONS¶
-	¶
◊	LEAVE-OF-ABSENCE¶
-	PERSONAL-LEAVE¶
-	NON-PAYMENT-FOR-LEAVE¶

3. Close the document and save your changes.
4. Open the document named **Employee Handbook**.
5. Set the insertion point before the title, "Employee Handbook". Select **Insert > Break > Page Break** to insert a page break. Press the up arrow key to move to the new page. Insert a **Table of Contents** (Hint: *Insert > Index and Tables then click the Table of Contents tab*). Choose **Formal** as the Table of Contents style with a **dotted tab leader**.
6. Set the insertion point at the end of the paragraph under the **Length of Vacation** heading, after the words **vacation table**. Type: **Please refer to the Vacation Table on page**
Insert a cross-reference that refers to the heading **Appendix A**. Choose **Heading** as the reference type and **Page Number** object to insert.
7. Mark all of the subheadings for an index, using the main heading as the main entry and the level 2 headings as the subheadings. (For example, you would set the insertion point before Hourly Rate Schedule, and then press **⌘ + Option**

+ **Shift + X** keystroke combination. Enter Rates of Pay for the main entry and Hourly Rate Schedule as the subentry.)

8. Press **⌘ + End** to move to the end of the document. Create an index using the **Classic format** with page numbers **right-aligned**. Choose a dotted line as the tab leader.
9. Scroll to page 7 of the document and set the insertion point after the words **Table 1 - Vacation Table**. Insert a Footnote with the text: **Vacation Table data subject to change**.
10. Save and close the document.

EVALUATION ONLY

Lesson 3 - Working with Forms

Lesson Topics:

- 3.1 Creating a Form
- 3.2 Resizing a Form
- 3.3 Adding a Text Field to a Form
- 3.4 Adding a Check-Box to a Form
- 3.5 Adding a Drop-down List to a Form
- 3.6 Adding Help to Form Fields
- 3.7 Protecting a Form
- 3.8 Using a Form Template

3.1 Creating a Form

In this lesson, you will create a new form.

A form is a prearranged document with spaces reserved for entering information. It is a means of collecting information. You are most likely already familiar with paper forms, such as customer surveys, employment applications, etc. Microsoft Word allows you to create electronic forms which you can distribute to those from whom you need information. These electronic forms can contain text boxes, drop-down lists or check-boxes, making the gathering of data more accurate.

Electronic forms are usually based upon templates. This allows the user to enter data into the form, without changing the formatting of the form or the form text. It's a good idea to lay out your form on paper first as this will make designing your form in Word much easier.

When you're ready to create your form, you may wish to consider using a table. Tables allow you to easily align your text and form fields. In fact, tables are so commonly used in form design that an **Insert Table** icon is located on the Forms toolbar.

Conference Evaluation Form			
Name:			
1. → How would you rate the speaker?	<input type="checkbox"/> Good	<input type="checkbox"/> Poor	<input type="checkbox"/> Excellent
2. → The information I received was:	<input type="checkbox"/> Poor	<input type="checkbox"/> Good	<input type="checkbox"/> Excellent
3. → Would you recommend this conference to others?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/>	<input type="checkbox"/>
4. → Name	<input type="text"/>	<input type="text"/>	<input type="text"/>
5. → Date of Conference	<input type="text"/>	<input type="text"/>	<input type="text"/>
6. → Your Occupation:	<input type="text"/>	<input type="text"/>	<input type="text"/>

To Create a New Form

1. Create a new blank document.
2. Save the document as a template.
3. Enter the form text (i.e. title, form instructions, etc.)
4. Display the Forms Toolbar (**View > Toolbars > Forms**).

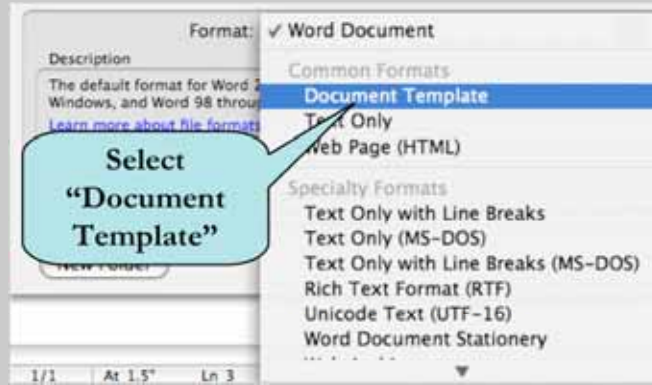
5. Insert a table with the necessary number of rows and columns.

Let's Try It!

What	Why
1. Click the New Blank Document icon.	Creates a new blank document.
2. Click the Bold icon and change the font size to 16 pt.	Sets the formatting for the form title.
3. Click the Center alignment button and type: Conference Evaluation Form	Enters a title for the form.
4. Press Enter twice.	Inserts two blank lines after the title.
5. Change the font size to 12 pt. and then click the Align Left button.	Changes the font size to 12 pt. and left-aligns the text.
6. Select View > Toolbars > Forms from the menu.	Displays the Forms toolbar.
<p>7. Click on the Insert Table icon on the Forms toolbar and then, with the mouse button held down, drag across the table grid to select four rows across and four rows down as shown on the right. Release the mouse button.</p> <div data-bbox="457 1386 558 1472" data-label="Image"> </div> <p data-bbox="386 1476 626 1507">Insert Table Icon</p>	<p>Inserts a table with four rows and four columns.</p> <div data-bbox="829 1186 1291 1419" data-label="Image"> </div>
8. Select File > Save As from the menu.	Opens the Save As dialog box.
9. Select Document Template from the Format drop-down list as shown.	Selects template as the file format.

What

Why



10. In the **Save as** box, type:
Conference Evaluation.

Enters a name for the form.

11. Click the **Save** button.

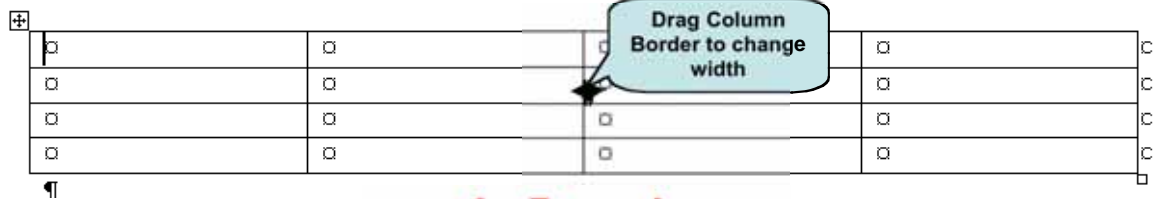
Saves the form as a template with the name "Conference Evaluation".

EVALUATION


3.2 Resizing a Form

This lesson will guide you through the process of resizing a form.

Most likely, the size of the columns for your form will not be the size that you want and you will inevitably need to resize the form to accommodate your form labels and form fields. You can adjust the column width by clicking and dragging the column border or the column margin until the column is the desired length. If you wish to use a more precise measurement for your column widths, use the Table Properties dialog box (Table > Table Properties from the menu).



To Adjust Column **Width**

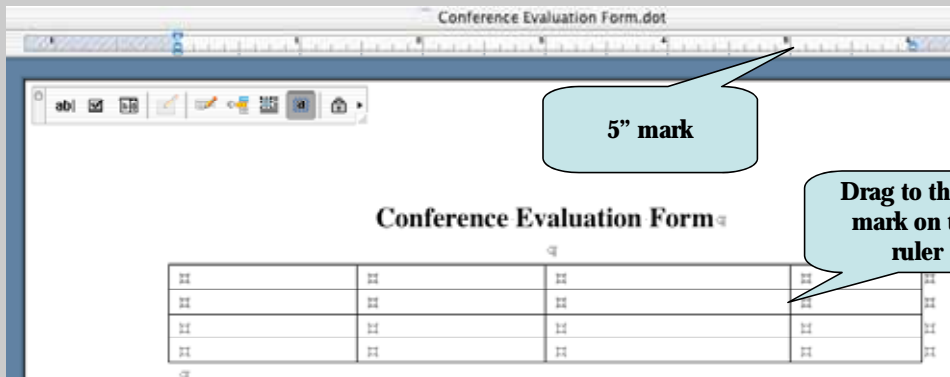
1. Move your mouse pointer over the border you wish to adjust until the pointer transforms into two vertical lines with a horizontal double arrow through it .
2. Click and drag to the left or right until border is the desired width.

For a more precise measurement:

1. Click anywhere in the column that you want to adjust.
2. Select **Table > Select > Column** from the menu to select the column.
3. Select **Table > Table Properties** from the menu.
4. Click the **Column Tab**
5. Type in the desired width in the Column Size box.

Let's Try It!

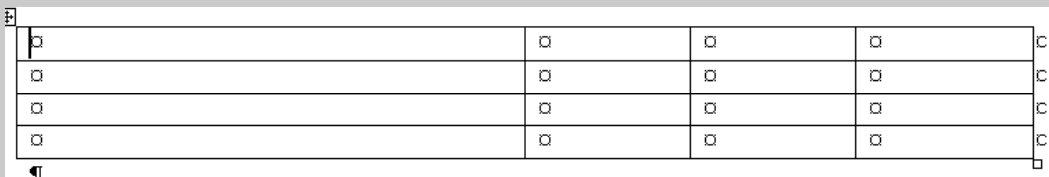
<u>What</u>	<u>Why</u>
1. Move the mouse pointer over the left border of the fourth column, then click and drag to the right until the border is at the 5" mark on the ruler as shown below.	Reduces the width of the last column.



2. Move the mouse pointer over the left border of the 3rd column, then click and then drag to the right until the border is at the 4" mark on the ruler.	Reduces the width of the 3 rd column.
--	--

3. Move the mouse pointer over the left border of the 2nd column, and then click and drag to the right until the border is at the 3" mark on the ruler.	Reduces the width of the 2 nd column.
---	--

4. Click the Save button.	Saves the current template.
----------------------------------	-----------------------------

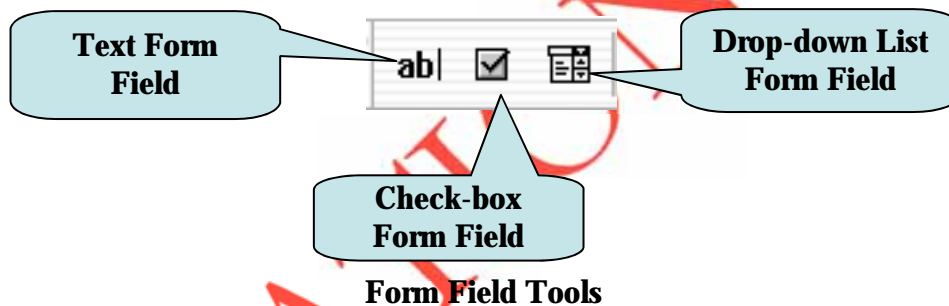


3.3 Adding a Text Field to a Form

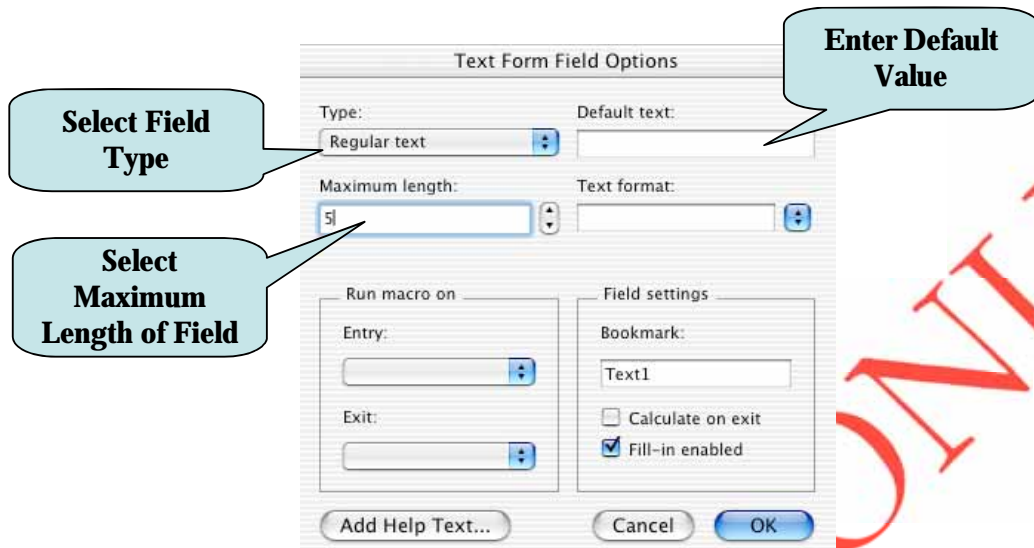
In this lesson, you will add a text field to your form.

After you have saved your form as a template and laid out your table, you can begin adding form fields to your form. The form field tools are located on the **Forms** toolbar. There are three types of form fields that you can add to a form:

- **Text box** – a fill-in-the-blank box into which a user enters text.
- **Check-box** – User selects an option by clicking into a box.
- **Drop-down list** – Allows you to limit the user's entry to a specific choice. User selects desired choice from a list of valid entries.



Once you have inserted your form field, you can set additional options. For instance, we could set our text field to not allow any more than 4 characters or to allow only valid date entries. To set form field options, **double-click** the form field and the appropriate form field dialog box will display. From there, you can set the desired options. An example of the Text Form Field Options dialog box is below.




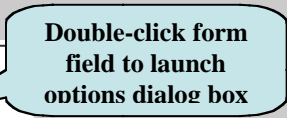
Text Form Field Options

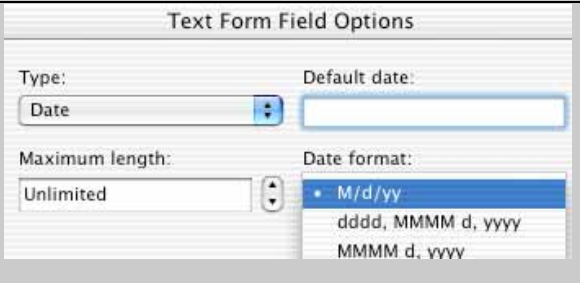
To Add a Text Form Field

1. Set the insertion point where you wish to insert the form field.
2. Click the **Text Form Field** button on the **Forms** toolbar.
3. **Double-click** the form field to set additional options.
4. Select any additional options from the Text Form Field Options dialog box.
5. Click **OK**.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Select the second, third and fourth columns of the first row as shown below.	As the first field can be somewhat long, we are going to merge the second, third and fourth cells of the first row into one larger cell.
2. Select Table > Merge Cells from the menu.	Merges the selected cells into one larger cell.
3. Set the insertion point in the first column of the first row .	Sets the insertion point where we want to type our form label.

<u>What</u>	<u>Why</u>				
4. Type: Name of Attendee and then press Tab .	Enters the label for the first form field, and then moves to the next column.				
5. Click the Text Form Field button on the Forms toolbar as shown.	Inserts a text form field into our form. <div style="text-align: center;">  <p>Text Form Field button</p> </div>				
6. Press Tab .	Moves to the second column of our form.				
7. Type: Date of Conference and then press the Tab key.	Enter the label for the next form field then moves to the second column.				
8. Click the Text Form Field button on the Forms toolbar.	Inserts a text form field into our form.				
9. Double-click the Date of Conference form field as shown below.	Opens the Text Form Field Options dialog box.				
<div style="display: flex; align-items: center;"> <table border="1" style="border-collapse: collapse;"> <tr> <td style="padding: 2px;">Name of Attendee: <input type="text"/></td> <td style="padding: 2px;"><input type="text"/></td> </tr> <tr> <td style="padding: 2px;">Date of Conference: <input type="text"/></td> <td style="padding: 2px;"><input type="text"/></td> </tr> </table> <div style="margin-left: 10px;">  </div> </div>		Name of Attendee: <input type="text"/>	<input type="text"/>	Date of Conference: <input type="text"/>	<input type="text"/>
Name of Attendee: <input type="text"/>	<input type="text"/>				
Date of Conference: <input type="text"/>	<input type="text"/>				
10. From the Type drop-down list, select Date as shown below.	Sets the text field as a date format. This will ensure that the user will only be able to enter a valid date into the field.				
<div style="border: 1px solid gray; padding: 5px; width: fit-content;"> <p>Type: <input type="text" value="Date"/> </p> <p>Default date: <input style="width: 100px;" type="text"/></p> </div>					
11. From the Date Format drop-down list, select M/d/yy as shown.	Sets the format for the date to display a two digit year.				

<u>What</u>	<u>Why</u>
	
<p>12. Click OK.</p>	<p>Closes the Text Form Field Options dialog box and applies the settings.</p>
<p>13. Click the Save icon.</p>	<p>Saves the changes to the form template.</p>

EVALUATION

3.4 Adding a Check Box to a Form


In this lesson, you will add a check field to your form.

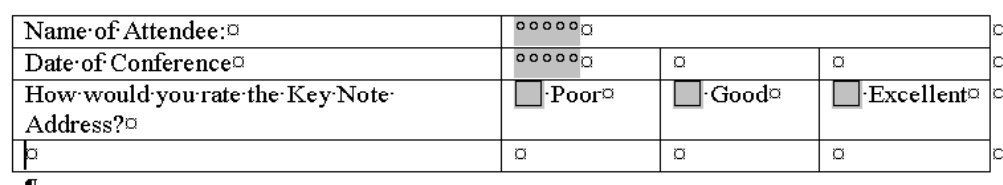
Check boxes are controls that a user checks or unchecks to show agreement or disagreement. You might want to use check boxes for items from which the user can make more than once choice. Check boxes are also commonly used for yes/no options. Like the text box, you can set additional check box options from the Check Box Form Field dialog box.

To Add a Check Box Form Field

1. Set the insertion point where you wish to insert the Check Box form field.
2. Click the **Check Box Form Field** button on the **Forms** toolbar.
3. **Double-click** the form field to set additional options.
4. Select any additional options from the Check Box Form Field Options dialog box.
5. Click **OK**.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Set the insertion point in the first column in the third row.	Sets the insertion point where we will type our next form field label.
2. Type: How would you rate the Key Note Address?	Enters the label for the next form field.
3. Press Tab .	Moves to the next column.
4. Click the Check Box Form Field icon on the Forms toolbar as shown.	Inserts a check box form field into your form.
	 Check Box Form Field button
5. Press the Spacebar and type: Poor	Enters addition descriptive text.

<u>What</u>	<u>Why</u>
6. Press Tab .	Moves to the third column.
7. Click the Check Box Form Field icon on the Forms toolbar.	Inserts a check box form field into your form.
8. Press the Spacebar and type: Good	Enters additional descriptive text.
9. Press Tab .	Moves to the fourth column.
10. Click the Check Box Form Field icon on the Forms toolbar.	Inserts a check box form field into your form.
11. Press the Spacebar and type: Excellent as shown.	Enters additional descriptive text.
	
12. Double-click the Check Box form field for Excellent and observe the options.	Opens the Check Box Form Field Options dialog box.
13. Click OK .	Closes the Check Box Form Field Options dialog box.
14. Press Tab .	Moves to the next row.
15. Click the Save icon.	Saves the template changes.

3.5 Adding a Drop-Down List to a Form

In this lesson, you will add a drop-down list to your form.

Drop-down List fields are used when you want to control the user's entries to a limited choice. When a user enters the drop-down list field, an arrow appears on the right. Clicking the arrow displays the choices from which the user can pick.

The screenshot shows a form with several fields: 'Name of Attendee', 'Date of Conference', 'How would you rate the Key Note Address?', and 'What is your occupation?'. The 'What is your occupation?' field is a drop-down list with 'Administration' selected. A callout box points to the field with the text 'Drop-down list field'. A list of options is shown below the field: Administration, Architecture, Education, Engineering, Law, and Technical.

The list choices are added by entering them into the **Drop-Down Form Field Options** dialog box. Enter each item into the **Drop-down** item box, and then click the **Add** button. Once you have added all of the list items, you can then order the items in the list to your satisfaction by selecting the item and then choosing the **Move Up** or **Move Down** button until item is in the desired position.


The screenshot shows the 'Drop-Down Form Field Options' dialog box. It has a 'Drop-down item:' field with an 'Add' button and a 'Remove' button. The 'Items in drop-down list:' field contains a list of items: Administration, Architecture, Education, Engineering, Law, and Technical. There are 'Move Up' and 'Move Down' buttons next to the list. The 'Drop-down enabled' checkbox is checked. Callout boxes point to the 'Add' button with the text 'Enter list items and then click Add' and to the 'Move' buttons with the text 'Use Move buttons to order items'. The dialog box also has 'Add Help Text...', 'Cancel', and 'OK' buttons.

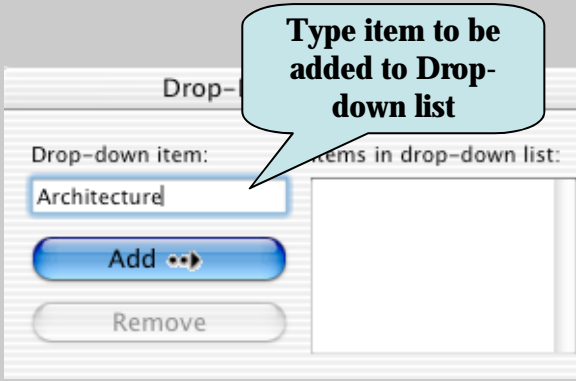

Drop-Down Form Field Options

To Add a Drop-Down List Form Field

1. Set the insertion point where you wish to insert the form field.
2. Click the **Drop-down Form Field** button on the **Forms** toolbar.
3. **Double-click** the drop-down form field.
4. In the **drop-down item** box, type the item to be added to the list.
5. Click the **Add** button.
6. Repeat steps 4 and 5 until all items have been added to the list.
7. To order items, select the item to be removed, and then click the Move Up or Move Down button until the item is in the desired position.
8. Click **OK**.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Type: What is your occupation?	Enters the label for the next form field.
2. Press Tab .	Moves to the next column.
3. Click the Drop-down Form Field button on the Forms toolbar as shown.	Inserts a drop-down list form field into your form.
 Drop-down Form Field button	
4. Double-click the drop-down form field you just added.	Opens the Drop-Down Form Field Options dialog box.
5. Click in the Drop-down item: box and then type: Architecture as shown below.	Enters the first list item.

What	Why
	
<p>6. Click Add.</p>	<p>Adds the item to the drop-down list.</p>
<p>7. Continue adding the items below into the Drop-down item box, clicking Add after each item.</p> <p style="text-align: center;"> Administration Education Engineering Law Technical </p>	<p>Enters the rest of the drop-down list items.</p>
<p>8. Click on Administration in the Items in drop-down list window.</p>	<p>Selects Administration. We are going to move this item to first position.</p>
<p>9. Click the Move Up button.</p>	<p>Moves the item up one space.</p> <div style="text-align: center;">  Move Up Button </div>
<p>10. Click OK.</p>	<p>Closes the Drop-Down Form Field Options dialog box and applies the changes.</p>
<p>11. Click the Save button.</p>	<p>Saves the template changes.</p>

3.6 Adding Help to Form Fields

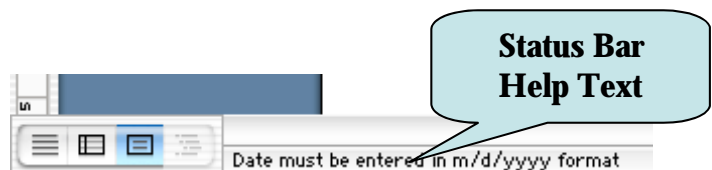
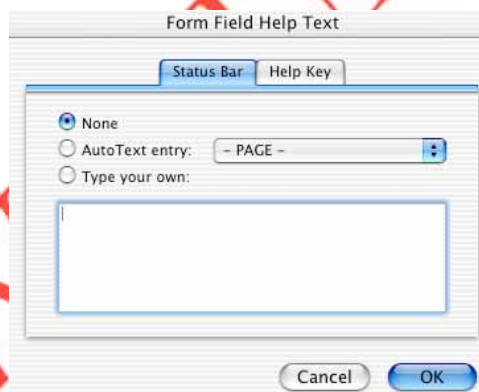
In this lesson, you will add Status Bar and F1 Key help to your form.

Adding Help to your form can make the form easier to fill out for the user. For example, you can inform the user how information is to be entered into a particular field or the type of information that is to be entered. There are two kinds of help that you can add to your form:

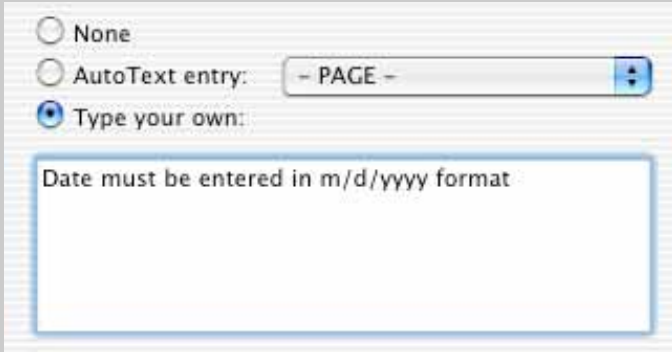
- **Status Bar** – Help text is displayed in the status bar when user selects the field.
- **Help Key** – An information dialog box is displayed when user selects the field and presses the **Help key**.

To Add Help to a Form Field

1. **Double-click** the form field to which you wish to add help.
2. Click the **Add Help Text** button.
3. Click the **Status Bar** tab to display help text in the status bar.
4. Click **Help Key** to add Help Key help.
5. To add your own help message, click the **Type your own** radio button and enter desired help text in the window.
6. To choose pre-defined help text, click the **AutoText entry** and choose the desired help message from the drop-down list.
7. Click **OK**.



Let's Try It!

<u>What</u>	<u>Why</u>
1. Double-click the text form field for Date of Conference .	Displays the Text Form Field Options dialog box.
2. Click the Add Help Text button.	Opens the Form Field Help Text dialog box.
3. Click the Status Bar tab.	Switches to status bar help options.
4. Click the radio button next to Type your own .	Sets the option to type our own help message.
5. In the Type your own: window, type: Date must be entered in m/d/yy format as shown below.	Enters our status bar help text.
	
6. Click OK .	Closes the Form Field Help Text dialog box.
7. Click OK .	Closes the Text Form Field Options dialog box.
8. Click the Save icon.	Saves the template changes.

3.7 Protecting a Form

In this lesson, you will learn how to protect your form from unauthorized changes.


After you create your form, you will want to apply protection to ensure that others will not be able to alter the formatting or the text of your form. Additionally, protecting a form turns it into a useable form, that is to say, users can now select check boxes and chose items from drop-down lists.

To Protect a Form

1. Select **Tools > Protect Document** from the menu.
2. Click the **Forms** radio button.
3. Enter a **password**.
4. Click **OK**.
5. Enter the password again.
6. Click **OK**.



Let's Try It!

What	Why
1. Select Tools > Protect Document from the menu.	Opens the Protect Document dialog box.
2. Click the Forms radio button.	Protects the entire form.
3. In the Password box, type: Conference and click OK . Note: Passwords are case-sensitive	Enters the password necessary to make any changes to the form's design.
4. Type Conference again in the reenter password box .	Confirms the password. 
5. Click OK .	Protects the form from changes.
6. Click the Save icon.	Saves the changes to the form.
7. Select File > Close from the menu.	Closes the template.

3.8 Using a Form Template

In this lesson, you will learn how to use a form template

Once you have created your form and protected your template, the form is ready for use. As we saved the form as a template, the form template will appear under the **My Templates** area of the **Project Gallery**. Opening the form as a regular document will enable the user to fill in the required fields, and then save the document with a different name. You can also now distribute your form to others for their use.

To Use a Form Template

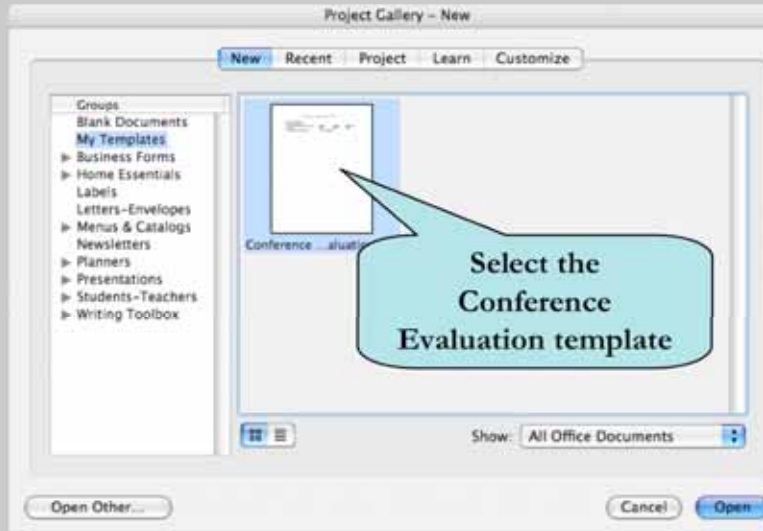
1. Select **File > Project Gallery** from the menu.
2. Click on **My Templates Area** in the New Document Task Pane.
3. Select the desired form template in the templates window and then click **OK**.
4. Complete the form by filling in form fields, checking check boxes or selecting options from drop-down lists.
5. Save the form with a new file name.

Let's Try It!

<u>What</u>	<u>Why</u>
1. Select File > Project Gallery from the menu.	Launches the Project Gallery.
2. Under the Category area, click on My Templates .	Opens the Templates dialog box.
4. Click the Conference Evaluation template as shown below, and then click Open .	Opens the form as a regular document.

What

Why



- | | |
|---|--|
| 5. Type: Rodney Larson and then press the Tab key. | Enters information for the first form field then moves to the next field. |
| 6. Type: 2/24/03 and observe the status bar. | Enters the date in the form field. Notice that the help text is displayed in the status bar. |
| 7. Click the check-box to the left of the word Excellent . | Checks the "Excellent" check box. |
| 8. Click in the drop-down list field. | Displays the list items. |
| 9. Click on Technical from the list. | Selects Technical as the occupation type. |
| 10. Click the Save button. | The Save As dialog box displays, prompting us for a file name. |
| 11. Click Cancel . | Closes the Save As dialog box. |
| 12. Select File > Close from the menu. Do not save changes. | Closes the form without saving changes. |

Lesson Summary – Working with Forms

- In this lesson, you learned how to create a form and save it as a document template. You also learned that tables are commonly used in form design as they allow you to easily align your text and form fields. You additionally learned that you can add form fields to your form from the Forms toolbar (View > Toolbars > Forms).
- Then, you learned how to adjust the column width of tables by clicking and dragging the column border or the column margin until the column is the desired length. You also learned that if you wish to use a more precise measurement for your column widths, use the Table Properties dialog box (Table > Table Properties from the menu).
- Next, you learned how to add a text field to a form from the Forms toolbar. You learned how to set additional field options by double-clicking on a form field.
- Next, you learned how to add a check box field to a form from the Forms toolbar. You learned that check boxes are used for items from which a user can make more than one choice.
- Next, you learned how to add a drop-down list field to a form from the Forms toolbar. You learned that drop-down list fields are used when you want to control entries to a limited choice. You also learned how to add drop-down list items from the Drop-Down Form Field Options dialog box.
- Next, you learned how to add Help to your forms. You learned that there are two types of Help that you can add to your form - Status Bar help, where help text is displayed in the status bar when user selects the field and Help Key help, where an information dialog box is displayed when user selects the field and presses the F1 key.
- Next, you learned how to protect a form by using the Tools > Protect Document command and then selecting the Forms radio button. This ensures that others will not be able to alter the formatting or the text of your form. Protecting a form also turns it into a useable form.
- Lastly, you learned how to use a form by creating a new document based on your form template from the My Templates area of the Project gallery.

Lesson 3 Quiz

1. What is the best format for forms?
 - A. Columns
 - B. Paragraphs
 - C. Tables
 - D. Web Page (HTML)
2. On what toolbar can you find the text form field?
 - A. Drawing Toolbar
 - B. Text Toolbar
 - C. Formatting Toolbar
 - D. Forms Toolbar
3. What type of fields can you add to your form from the Forms toolbar (Select all that apply):
 - A. Text field
 - B. Check Box
 - C. Radio Button
 - D. Drop-down list
4. Before a form is useable, you must:
 - A. Insert a table
 - B. Add form field columns
 - C. Protect the document for forms
 - D. Add multiple-choice options
5. What document format is best suited for forms?
 - A. Word 2004
 - B. Document Template
 - C. Web Page format
 - D. Forms format
6. While creating your form, you decide that you want to add default text to a text box field. How can you accomplish this?
 - A. Right-click the field, select "Default Text" from pop-up menu, and then enter the desired text.
 - B. Select Tools > Options > Text Options from the menu and then enter the desired text in the Text Options dialog box.
 - C. Click the text options button on the Forms toolbar and then enter the desired text in the Text Options dialog box.
 - D. Double-click the text field and then type in the desired text in the Default Text field in the Text Form Field Options dialog box.
7. You can select more than one option from the drop-down list form field.
 - A. True
 - B. False

8. When might you want to use a check box field (Select all that apply):
 - A. When you want a user to show agreement or disagreement
 - B. When you want a user to choose from a list of items
 - C. When you want the user to have the option of making more than one choice
 - D. When you have yes/no items on your form
9. Describe the process of adding items to a drop-down list.

10. Once you have added items to a drop-down list, you can rearrange them.
 - A. True
 - B. False
11. What are the two types of help that you can add to a form field?
 - A. Status Bar help
 - B. Message box help
 - C. Form field help
 - D. Help key help
12. You can access a form that you have saved as a template from:
 - A. The Forms Templates folder
 - B. The Project Gallery
 - C. Entourage
 - D. From the Forms toolbar

EVALUATION ONLY

LAB 3 – ON YOUR OWN

1. Click the New Blank Document icon. Type: **Customer Satisfaction Survey** and then press **Enter** twice.
2. Select **File > Save As** from the menu and save the document as a **document template** with the name **Customer Survey**.
3. Select **Table > Insert > Table** from the menu. Insert a table with **3 columns** and **4 rows**. Enter information into the table as follows:

Name□	□	□	□
Date□	□	□	□
Did you enjoy your meal?□	□	□	□
How often do you eat here?□	□	□	□

4. Select **View > Toolbars > Forms** from the menu. Merge together the cells of the second and third columns in the first row to make one larger cell (Hint: Table > Merge Cells). Add a **text form field** in the merged cell.
5. In the column to the right of **Date**, add a text form field. Restrict the field only to accept a **Date** data type with the format **M/d/yyyy**.
6. Add a check box form field in the column to the right of "**Did you enjoy your meal?**" text. Press the space bar and type: **Yes**. Press Tab and add a check box form field in the last column. Press the space bar and type: **No**.
7. In the column to the right of "**How often do you eat here?**", insert a drop-down list form field. Add the following list items:
 - several times a week**
 - < once a week**
 - < once a month**
 - < once a year**
8. Protect the document from unauthorized changes. Use **thunder** as the password. Save and close the document.
9. Open the document from the Templates area to test the form fields. Close without saving your changes.

Lesson 4 - Customizing Word

Lesson Topics:

- 4.1 Recording a Macro
- 4.2 Running a Macro
- 4.3 Editing a Macro
- 4.4 Adding a Custom Menu to the Menu Bar
- 4.5 Adding Commands to a Menu
- 4.6 Adding Buttons to the Toolbar