

# Word 2010 Advanced: Part I

Templates, Forms and Styles

Stephen Moffat, The Mouse Training Company

Microsoft®  
Word 2010



## Word 2010 Advanced - Part I



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# **Word 2010 Advanced**

## **Part I**

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Word 2010 Advanced: Part I

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# Introduction

Word 2010 is a powerful word processing application that allows users to produce typed documents. These can range from simple letters through to fax cover sheets, reference manuals and sophisticated reports incorporating numbered headings, figures and graphics.

## How To Use This Guide

This manual should be used as a point of reference following attendance of the introductory level Word 2010 training course. It covers all the topics taught and aims to act as a support aid for any tasks carried out by the user after the course.

The manual is divided into sections, each section covering an aspect of the introductory course. The table of contents lists the page numbers of each section and the table of figures indicates the pages containing tables and diagrams.

## Instructions

Those who have already used a spreadsheet before may not need to read explanations on what each command does, but would rather skip straight to the instructions to find out how to do it. Look out for the arrow icon which precedes a list of instructions.

## Appendices

The Appendices list the Ribbons mentioned within the manual with a breakdown of their functions and tables of shortcut keys.

## Keyboard

Keys are referred to throughout the manual in the following way:

**ENTER** – Denotes the return or enter key, **DELETE** – denotes the Delete key and so on. Where a command requires two keys to be pressed, the manual displays this as follows:

**CTRL P** – this means press the letter “p” while holding down the Control key.

### ► Commands

When a command is referred to in the manual, the following distinctions have been made:

When Ribbon commands are referred to, the manual will refer you to the Ribbon – E.g. “Choose **HOME** from the Ribbons and then **B** for bold”.

When dialog box options are referred to, the following style has been used for the text – “In the **PAGE RANGE** section of the **PRINT** dialog, click the **CURRENT PAGE** option”

Dialog box buttons are shaded and boxed – “Click **OK** to close the **PRINT** dialog and launch the print.”

Within each section, any items that need further explanation or extra attention devoted to them are denoted by shading.  
E.G.:

*“Word will not let you close a file that you have not already saved changes to without prompting you to save.”*



# 1 Advanced tables

**By the end of this section you will be able to:**

- Move and copy table rows and columns
- Split a table
- Change table size and alignment
- Merge and split table cells
- Sort table data
- Add formulae to tables
- Draw tables

## Moving and copying

Rows and columns in a table can be moved using the same procedures as text within a document. However, the position of the insertion point when pasting or dragging rows and columns is important as it can alter the final result.

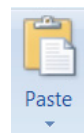
### Using Cut/Copy & Paste

#### ► To move or copy a row/column:

##### Mouse



1. Select the row to be moved/copied or select the column to be moved/copied.
2. Click on the **CUT/COPY** button.
3. Select the row where you want to paste (Word pastes above) or select the column where you want to paste (Word pastes to the left).



4. Click on the **PASTE** button

### Using Drag & Drop

Rows and Columns can also be moved or copied using standard drag and drop techniques.

#### ► To Move the selection:

##### Mouse

1. Click on the middle of the selected area and drag it to the new location

#### ► To Copy the selection:

##### Mouse

1. Click on the middle of the selected area and hold down the **CTRL** while you drag the selection to where you want to copy it. Release the mouse button *before* the **CTRL** key

## Splitting A Table

Sometimes you need to split a table between rows to add text in-between.

### ► To split a table in two at the current cursor position:

#### Mouse

1. Select the table at the point you wish to split it.
2. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT TABLE** button.

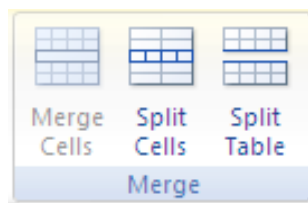
#### Or

#### Keyboard

1. Press **CTRL SHIFT ENTER**
  - *To rejoin tables that have been split, simply delete the paragraph marker between them.*

## Merging And Splitting Cells

When you have inserted your table there may be times in a number of cells that you would want them as one cell and not several and similarly you may wish for one cell to be split into several. In 2010 this feature is easy to do. Not only can you split cells but you can split a whole table into multiple tables if the need arises



### ► To split cells

#### Mouse

1. Select the cell(s) you wish to split
2. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT CELLS** button.

### ► To merge cells

#### Mouse

1. Select the cells you wish to merge.
2. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **MERGE CELLS** button.

### ► To split Table

#### Mouse

1. Click in the row that you wish to be the first row of the split table.
2. Go to the **MERGE** group on the **LAYOUT** ribbon and click the **SPLIT TABLE** button.
3. The table will split above the row your cursor is in.

## Table sizes and alignment

The columns, rows and positioning of a table on the page are all adaptable. Some of the techniques for getting the best results when changing these options are outlined below.

### Advanced Column Width Techniques

When you adjust the width of a column, Word proportionately resizes the other columns to the right so that the overall table width does not change. However it is possible to be more precise about how the remaining columns should be affected.

- The **SHIFT** key allows the width of a column to be altered and increases the overall width of the table accordingly.

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To increase the width of column 1, click over the column boundary and drag it with the mouse...

--	--	--

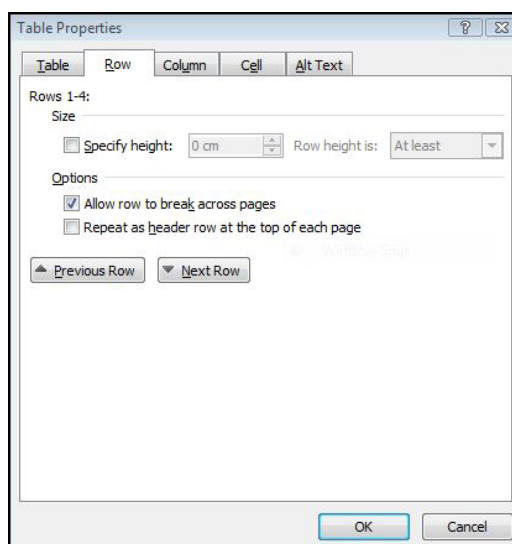
Column 2 becomes narrower

To increase the width of column 1 without altering the width of column 2, click over the column boundary, hold down the **SHIFT** key and drag it with the mouse...

--	--	--

Column 1 width increases and so does the overall width of the table

## Row Height



The height of the rows in a Word table is usually controlled by the contents of the cell. If the text in a cell is too wide, Word will wrap the text within the cell. Using the **ENTER** key to insert blank lines within a cell can also alter the height of rows.

In a situation where a cell's height needs to be set precisely there is an option on the layout ribbon that allows you to input a specific measurement. This is particularly useful if tables are being used to create forms and space should be left for people to fill the form in.

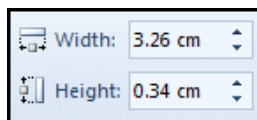
### ► To change the row height:

#### Mouse

1. Select the rows where the height is to be changed
2. Choose **PROPERTIES** from the **LAYOUT** ribbon

3. Select the **ROW** Tab in the dialog
4. Use the **ROW HEIGHT IS:** field to set a precise size

Or



1. Change the cell height in the **CELL SIZE** group by entering the height you wish
- The options in the **HEIGHT** drop-down list are outlined next:

Option	Result
Exactly	This sets a specific height that will not adjust
At Least	Enables specification of a minimum height, but will still fit rows around text that is taller

- You can also use the **BEFORE** and **AFTER** options in the **PARAGRAPH FORMAT** dialog box to space out text within cells in a table.

## Table Alignment

Tables can be aligned to the left, right or centre of the page. The default for tables is left aligned. Individual rows can be aligned - but if the whole table is to be affected, ensure that the entire table is selected before issuing the command.

- This is **NOT** text alignment but **TABLE** alignment to the page

### ► To change table alignment:

#### Mouse

1. Select the row(s) to align or the whole table.
2. Choose **PROPERTIES** from the **LAYOUT** ribbon.
3. Click on the **TABLE** tab, and select the required alignment.

## Indenting The Table

The whole table may be indented from the margin, this is useful to do if you wish to align your table with any indented text within a document



► To indent table rows:

Mouse

1. Select the table.
2. Choose **PROPERTIES** from the **LAYOUT** ribbon.
3. Click on the **TABLE** Tab.
4. Set the indent in the **INDENT FROM LEFT:** field
  - *To indent text within cells, use the indent options within the Paragraph format dialog box.*

## Sorting your data

### Sorting Cells

You can quickly sort cells, arranging the entries in alphabetic, numeric or date order. Word changes the order of rows based on the first column unless you specify otherwise.

COUNTRY	YEAR	INVESTMENT
Albania	1998	£1,867,659.00
Bulgaria	1999	£657,948,945.00
Romania	1998	£867,482,475.00
Turkmenistan	1999	£768,958,372.00

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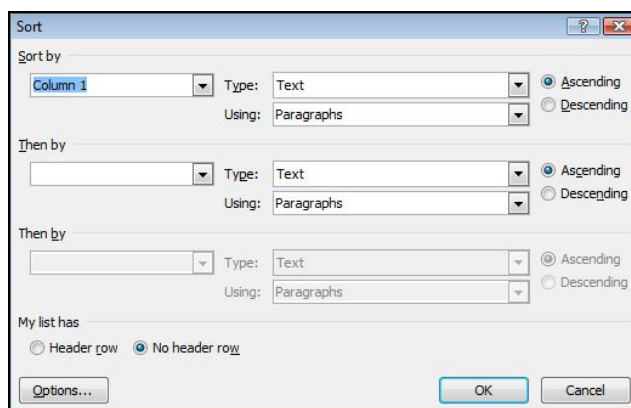
The table above is currently in alphabetical order by Country. Supposing you wanted to sort the table by Year, and where the year is the same, you want it sub-sorted by Investment.

► To sort the table:

Mouse



1. Select the table.
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
3. In the **SORT** dialog box, select the options that you want.



4. Choose the main **SORT BY** column from the drop-down list.
5. Select the **TYPE** of information in that column (Text, Number or Date).
6. Choose the **SORT ORDER** (Ascending or Descending).
7. Repeat this process in the **THEN BY** field if you are sub-sorting.

The table from the previous page would now appear like this:

COUNTRY	YEAR	INVESTMENT
Albania	1998	£1,867,659.00
Romania	1998	£867,482,475.00
Bulgaria	1999	£657,948,945.00
Turkmenistan	1999	£768,958,372.00

### Header Row

- *The first row in the table will not be included in the sort, and the text in the cells of that row will appear as choices in the Sort by/Then by fields.*

### No Header Row

- *All the rows will be included in the sort, and you select the column number to sort by (rather than the names). The choice here depends on whether your table has headings in the first row:*

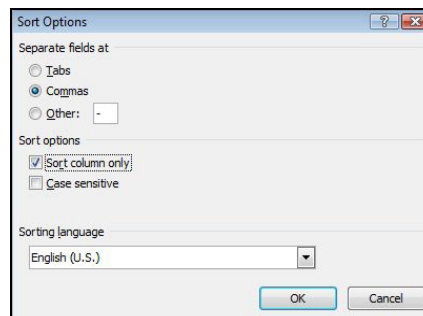
### Sort A Single Column In A Table

If you just wish to sort the data in one column while leaving the data in all other columns unchanged then we need to select that column and change a setting.

#### ► To sort a single column

##### Mouse

1. Select the column that you want to sort.
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.



3. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.
4. Click **OPTIONS**.
5. Under **SORT OPTIONS**, select the **SORT COLUMN ONLY** check box.
6. Click **OK**.

### Sort By More Than One Word Or Column Inside A Table.

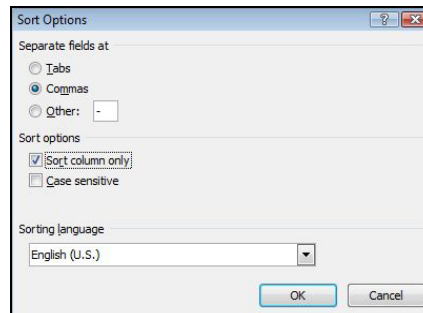
To sort the data in a table that is based on the contents of a column where it includes more than one word, you must first use characters to separate the data — including data in the header row.

- *E.G. if the cells in a column contain both last and first names, you can use commas to separate the names.*

► To sort a table by multiple columns

Mouse

1. Select the column that you want to sort.
2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **SORT**.
3. Under **MY LIST HAS**, click **HEADER ROW** or **NO HEADER ROW**.



4. Click **OPTIONS**.
5. Under **SEPARATE FIELDS AT**, click the type of character that separates the words or fields that you want to sort.
6. Click **OK** to close dialog
7. In the **SORT** dialog under **SORT BY**, in the **USING** list, select which word or field you want to sort by.

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8. In the first **THEN BY** list, enter the column that contains the data that you want to sort by, and then in the **USING** list, select which word or field you want to sort by.
9. If you want to sort by an additional column, repeat this step in the second **THEN BY** list.
10. Click **OK** to apply sort

## Table formulas

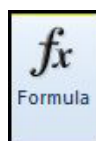
You can write formulae inside table cells to perform common calculations. You can use **A1**, **B1**-style references as you might in an Excel spreadsheet. However, you are not able to create relative cell references, therefore formulas cannot be copied across a row or down a column.

P & L Account	
Sales	£100,000.00
Costs	£64,000.00
Profits	£36,000.00

Formula  
used to work  
out profit

### ► To create a formula:

#### Mouse



1. Position the mouse in the cell you wish to create a formula.

2. Under **TABLE TOOLS**, on the **LAYOUT** ribbon, in the **DATA** group, click **FORMULA**.
3. Word may automatically suggest a formula, which you can overwrite. Use the = sign to begin the formula and the same mathematical operators as are used in Excel ( , -, \*, / ).

4. Use **A1** style references to cells within the table - you will have to work out which reference will apply to each cell you are referring to. In the example above, the profit has been worked out using the formula =**B2-B3**, and assigning a currency number format to get the £ sign.

### Formatting Numbers

You can format a formula's results by using the drop-down list of Number Formats in the formula dialog. The available formats are similar to those in Excel, such as Comma, Currency and Percentage.

### Updating The Formula

If the figures in the table change, the formula result only updates when you print the document. If you want to see the new result on the screen, you will need to manually update the formula.

#### ► To update a formula's result:

##### Keyboard

1. Click on the cell containing the result
2. Press **F9**.

##### OR

##### Mouse

1. Right click on the formula
2. Click on **UPDATE FIELD**

### Paste Function

When you use the **PASTE FUNCTION** tool into a cell, Word will detect numbers in the cells above and to the left of the current cell and may offer to sum them for you.

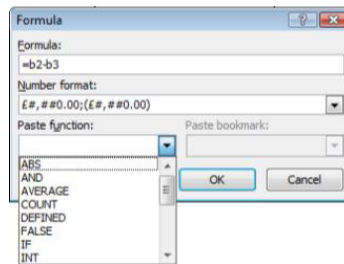
### AutoSum

Positioning at the bottom of a column of numbers automatically creates a =SUM(ABOVE) function. Positioning to the right of a row of numbers automatically creates a =SUM(LEFT) function. You can also use BELOW and RIGHT to refer to adjacent cells below or to the right of formulas.

### Functions

You can paste in an Excel function, such as **AVERAGE**, **COUNT** or **IF** from a list contained in the Formula dialog.





- E.G. to count the number of entries in a column above the cell where the cursor is positioned, choose:

**=COUNT(ABOVE)**

### Nesting Functions

Once the function is pasted in, you can use cell references as earlier to edit the function if necessary. You can also 'nest' functions inside others using the Paste function: list.

- E.G. to add a different rating depending on the highest value in the column above, enter:

**=IF(MAX(ABOVE)>50000,"WELL DONE","TRY HARDER")**

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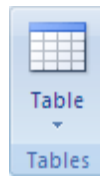
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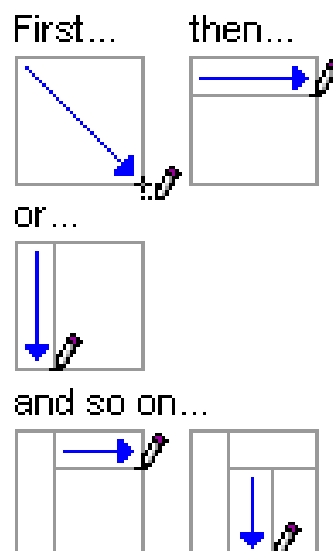
### Draw A Table



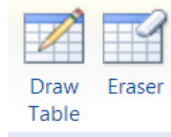
You can draw a complex table — E.G. one that contains cells of different heights or a varying number of columns per row.

#### ► To draw a table

##### Mouse



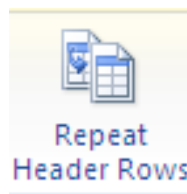
1. Click where you want to draw the table.
2. On the **INSERT** ribbon, in the **TABLES** group, click **TABLE**.
3. Click **DRAW TABLE**.
4. The pointer changes to a pencil.
5. To define the outer boundaries of the table, draw a rectangle.
6. Draw column and row lines inside the rectangle.
7. To erase a line or block of lines, under **TABLE TOOLS**, on the **DESIGN** ribbon, in the **DRAW BORDERS** group, click **ERASER**.



8. Click the line that you want to erase. When you are finished, click **DRAW TABLE** to continue drawing the table.
9. When you finish drawing the table, click in a cell and start typing or insert a graphic.

### Repeating Table Headings

When a table spreads across more than one page, it can be useful to automatically repeat the first row(s) of the table on each page as the first row(s) will often contain headings that apply to the columns of the table. If you choose to repeat table headings, the rows you have chosen will automatically be inserted at the top of each new page the table spreads onto. To edit the heading rows or make formatting changes, you must go back to the top of the table as it is simply an image of the first row(s) on the other table pages.



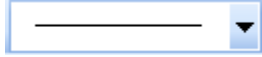
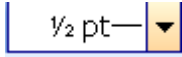







#### ► To repeat table headings:

##### Mouse

1. Select the row(s) that you wish to repeat at the top of each page that the table prints on.
  2. Go to the **DATA** group on the **LAYOUT** ribbon and click the **REPEAT HEADER ROWS** button
- You will only see the repeating headings when you are in Print Layout or Print preview*

## Layout Options

Icon	Function	Ribbon & group
	Draw Table - Inserts a table where you drag in the document. After creating the outside of the table, drag inside to create columns and rows.	Design, draw borders
	Eraser - Removes a table cell line and merges the contents of the adjacent cells.	Design, draw borders
	Line Style - Choose the line style and thickness to draw your table with.	Design, draw borders
	Line Weight - Choose the width of the border you require.	Design, draw borders
	Border Colour - Choose the colour of the border you require.	Design, draw borders
	Borders - Allows you to add a border of some type to the table or individual cells.	Design, Table styles
	Shading Colour - Allows you to select a colour to fill the table or individual cells.	Design, Table styles
	Merge Cells - Combines the contents of selected adjacent cells into a single cell.	Layout, Merge
	Split Cells - Splits the selected cells into the number of rows or columns you specify.	Layout, Merge

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	Distribute Rows - Alters the height of the selected cells to make them equal.	Layout, Cell size
	Distribute Columns - Alters the width of the selected cells to make them equal.	Layout, Cell size
	Change Text - Changes direction of the selected text in a cell horizontally, left or right.	Layout, alignment
	Sort Ascending - Sorts the selected items alphabetically from the beginning of the alphabet.	Home, paragraph
	Sort Opens the sort dialog box	Layout, data
	Formula - Allows calculations to be entered into a cell.	Layout, data
	Align Top Left, Centre & Right - Aligns the text contained within the selected table or cells at the top of the cell.	Layout, alignment
	Align Centre Left, Centre & Right - Aligns the text contained within the selected table or cells in the centre of the cell.	Layout, alignment
	Align Bottom Left, Centre & Right, - Aligns the text contained within the selected table or cells at the bottom of the cell.	Layout, alignment

## TableStyles

After you create a table, you can format the entire table by using Table Styles. By resting your pointer over each of the preformatted table styles, you can preview what the table will look like.

### ► To use table styles to format an entire table

#### Mouse

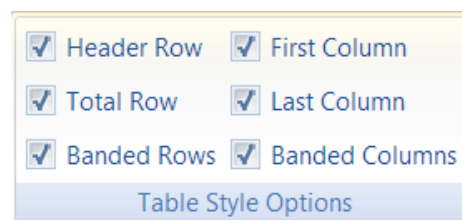
1. Click in the table that you want to format.
2. click the **DESIGN** ribbon. In the **TABLE STYLES** group, rest the pointer over each table style until you find a style that you want to use.



3. To see more styles, click the **MORE** arrow .
4. Click the style to apply it to the table.



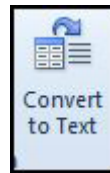
5. In the **TABLE STYLE OPTIONS** group, on the **DESIGN** ribbon select or clear the check box next to each of the table elements to apply or remove them from the selected style.





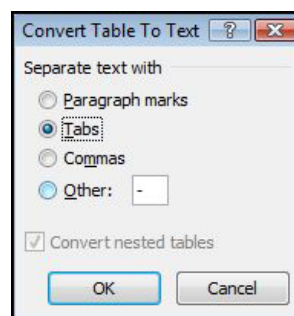
## Converting Table To Text

At times you may have data in a table that you wish was normal text to allow you to arrange it in other ways or do other things with it. So we need to remove the table from around the data and leave the data intact. Some form of delimiting character (separator) needs to replace the cell walls so that it can be turned back into a table if necessary at some later date.



### ► To convert table to text

#### Mouse



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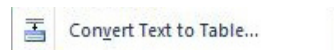
1. Select the table or select the rows/columns of data you wish to convert.
2. Go to the layout ribbon in the data group and click the convert to text button a dialog will appear.
3. Select a delimiter type from the choices presented.
  - If **OTHER**, then manually type character you wish as a delimiter in the box provided.
4. Click **OK** to convert.

Title	→	FirstName	→	LastName	→	Company
Mr.	→	Tim	→	Granus	→	Virginia Conservation
Mr.	→	Carlos	→	Santos	→	Santos Inc.
Ms.	→	Rachel	→	Tagon	→	EGS
Mr.	→	William	→	Moore	→	Diversified Corporation
Mrs.	→	Anne	→	Smolkovich	→	Shelburne Schools

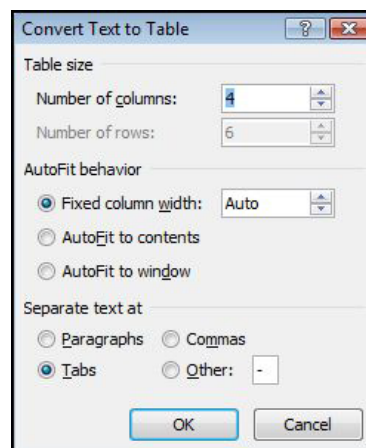
## Text To Table

### ► To convert text to table

#### Mouse



1. Turn on **SHOW/HIDE** characters from the **HOME** ribbon **PARAGRAPH** group to identify the kind of delimiter separating your text.



2. If none exist then you will have to manually create the delimiters within your data
3. Select the text you wish to convert

4. Go to the **INSERT** ribbon **TABLES** group and click on **TABLE**
5. From the menu select **CONVERT TEXT TO TABLE** a dialog will appear
6. Make a choice on how the data has been separated if different from Tabs (tabs are default) the number of rows and columns should then appear automatically, if you wish different amounts then enter new values.
7. Click on **OK** to convert your data

# Section 2    Advanced formatting

**By the end of this section you will be able to:**

- Understand what styles are
- Apply default styles to paragraphs and text
- Create styles
- Redefine styles
- Copy styles between documents
- Apply borders to text, paragraphs and pages
- Create and use columns

## Styles

In Word, a “style” is a collection of font and paragraph formats given a specific name. It may be used to apply formatting to areas of a document quickly or to make changes easily to everything, which already has a certain style applied. A style can either apply to a whole paragraph of text or to a few individual characters.

### Default Styles

Word supplies a number of default styles, which are attached to the Normal Template. These may be altered to reflect personal choices.

### Normal Style

The “NORMAL” style, in the Style list box (found by using the dialog box launcher of the **STYLES** group), controls the overall characteristics of most of the text in a document and is the style that will be first seen on opening a new document.

### Headings 1 - 9

Word supplies nine heading styles, which variously underline, bold, and indent etc. the text they are applied to. When a new document is created, based upon the Normal Template, only three heading styles appear to be available but you can see all the possible default styles changing which styles are viewed.(explained later)

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## QuickStyles

These are ordinary styles that have been added to the QuickStyle gallery which is what you see in the styles group on the home ribbon you may customise this gallery to add your most often used styles to allow speedy access to them when needed.

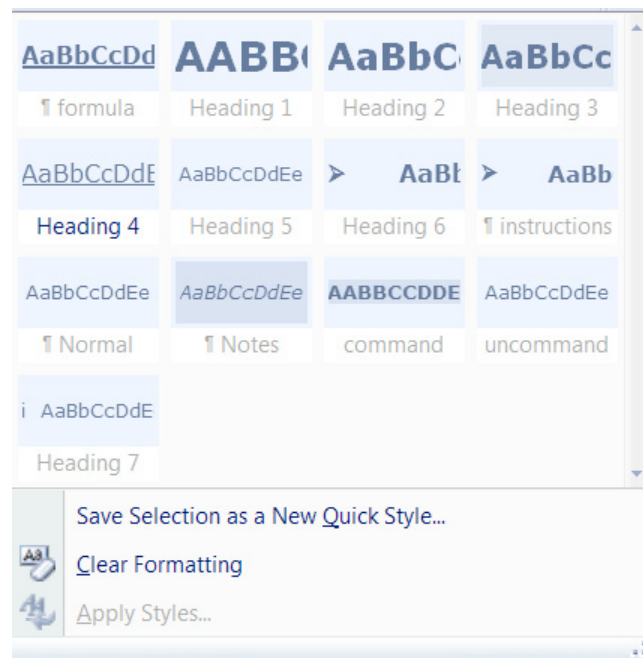
## Default Paragraph Font

When you have applied a style to a paragraph, you may decide to add some extra formatting. If at a later point you then want to remove the extra formatting and return to the underlying style format you can use this style to do so.

You can choose from a variety of methods to apply styles to existing text in a document.

### ► To apply a style using the Quick style gallery:

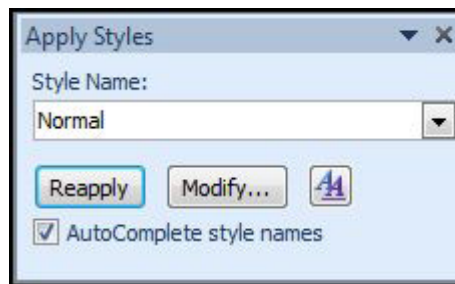
#### Mouse



1. Select text to be changed.
2. Go to the **STYLES** group on the **HOME** ribbon.
3. Move your mouse over the styles to see a preview temporarily applied to the text in your document you have selected.
4. Select a style you can see or click on the down arrow to the bottom right of the visible styles to open the style gallery
5. More styles may be available by scrolling down.
6. Click on selected style to apply



► To - apply a style - dialog  
keyboard



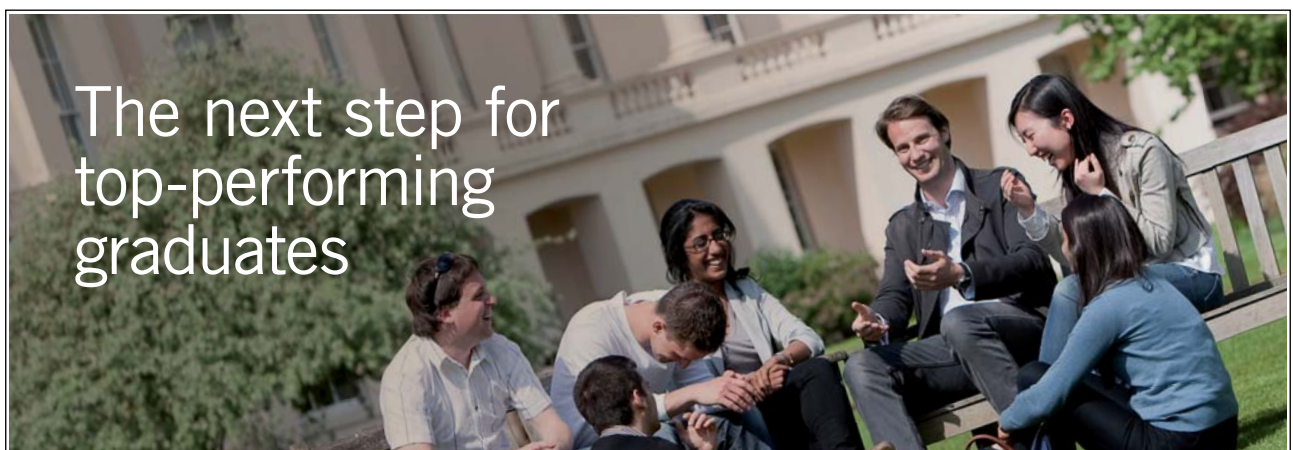
1. Press **CTRL SHIFT S** to bring up a dialog
2. Select a style from the dialog that appears..

► To apply a style using a shortcut key:

Keyboard

1. Heading styles 1 to 3 already have the shortcut keys **CTRL ALT num** defined, where num is 1 for heading style 1 and so on.

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### Masters in Management



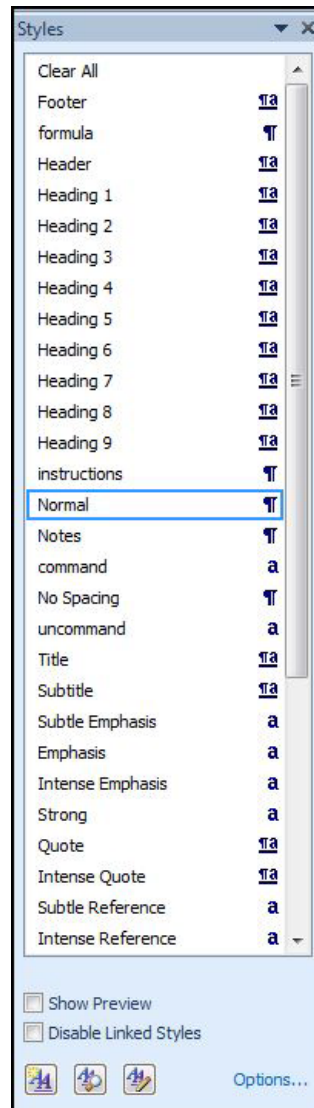
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This 12-month, full-time programme is a business qualification with impact. In 2010, our MiM employment rate was 95% within 3 months of graduation\*; the majority of graduates choosing to work in consulting or financial services.

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\* Figures taken from London Business School's Masters in Management 2010 employment report



► To apply a style from styles task pane

Mouse

1. Click on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon



2. Select any style visible

► To change to another style:

Mouse

1. Select the paragraph(s) (or select text) to be changed
2. Click on the required style from the Style window.

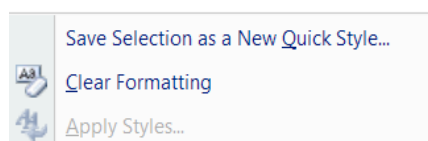
## Creating New Quick Styles

You might want to create a new style and add it to the Quick Styles gallery, or you might want to add a style that does not appear in the Quick Styles gallery but that you use often.

### ► To create a new QuickStyle:

#### Mouse

1. Select the paragraph(s) that you want to create style from
2. Change the format of the font, paragraph etc. as required
3. Go to the **STYLES** group on the **HOME** ribbon
4. Select the down arrow to the bottom right of the visible style to open the gallery
5. Select **SAVE SELECTION AS NEW QUICK STYLE** from the available choices.
6. New style will be found in the **QUICK STYLE GALLERY**.
  - *It is also possible to create a new style using the styles task pane. The window can be opened by Clicking on the **DIALOG BOX LAUNCHER** on the **STYLES** group on the **HOME** ribbon*



## Create New Style From Taskpane

Creating and applying a new QuickStyle from existing text may seem easy enough but when you are preparing styles for a new document you will need to create them from scratch the easiest and most straightforward way of doing this is from the styles taskpane (shown previously). From here we can create manage export and import our styles as well as use tools like the style inspector.

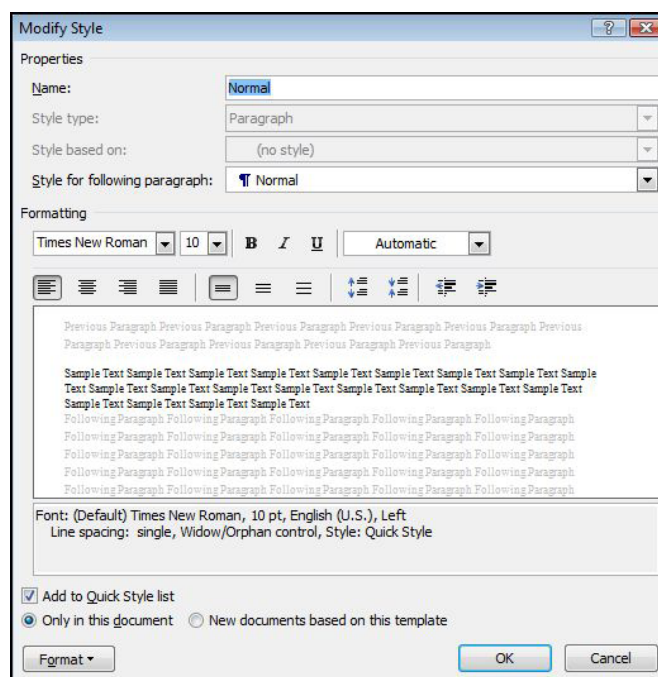
### ► To create a style from the taskpane.

#### Mouse

1. Use the **DIALOG BOX LAUNCHER** to show the **STYLES** taskpane as mentioned previously.



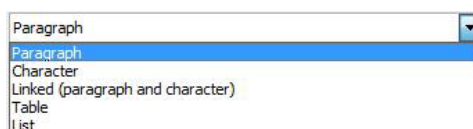
- Click on the **NEW STYLE** button at the bottom of the taskpane. It is the first of three buttons a dialog appears.



- Give the style a name in the top text box.
- Make choices from the following selection boxes.
- Make a choice whether to make this style available in this document or to make it available to other documents based on the template your current document is based on.
- Click **OK** to create style.

## Style type

A style can be for various things if you look in the drop down box you will see various options a paragraph style will only apply paragraph formatting settings any text in your document for example.



The most common type of style is the linked where you will be able to apply ALL types of formatting to selected text but the choice depends really upon your need. You may wish only one or two paragraph styles in your document but many character styles or vice versa.

**Based on**

It saves time if the style you are going to create has many formatting changes to base it on a similar style to the one you are going to create as then you will not have to make quite so many formatting changes.

Another important reason is that if the base style is modified by say changing the font it will then apply to all the styles based on it without you manually having to go and change them all.

**Style For Following Paragraph**

1. Select the style that you want applying to the paragraph after you press return in your document the next paragraph will be formatted with the style you choose here.
  - *E.G. When creating a Chapter Heading style, you might select the Heading 1 style in the Style For Following Paragraph box. This means that when you press **ENTER** at the end of a paragraph formatted with the Chapter Heading style, Word automatically applies the Heading 1 style to the next new paragraph.*

**Add to QuickStyle list**

Set this option if you wish to see your style in the QuickStyle gallery as mentioned earlier remember it can be added or removed at any time

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- Food, Hospitality, Tourism & Leisure Studies
- Humanities & Social Science

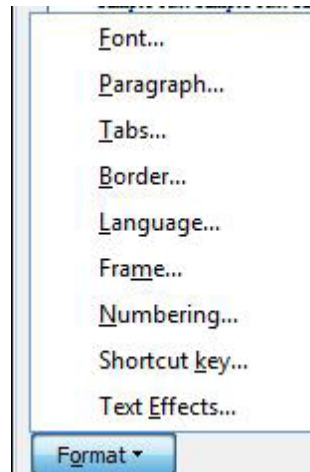
For more details or an application form please contact MMU International.  
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### Format button

The format button is the way we set formats within a style. Hopefully by now you are used to all the dialog boxes you are likely to encounter while using this tool. You will encounter the **FONT**, **PARAGRAPH**, (the button to launch **TABS** dialog is in the **PARAGRAPH** dialog.) **BULLETS AND NUMBERING**, **BORDERS** amongst others.



Selecting any option within the format menu of the modify style dialog will launch the dialog boxes for each of the selected areas. This gives you every formatting option available for paragraph or character formatting.

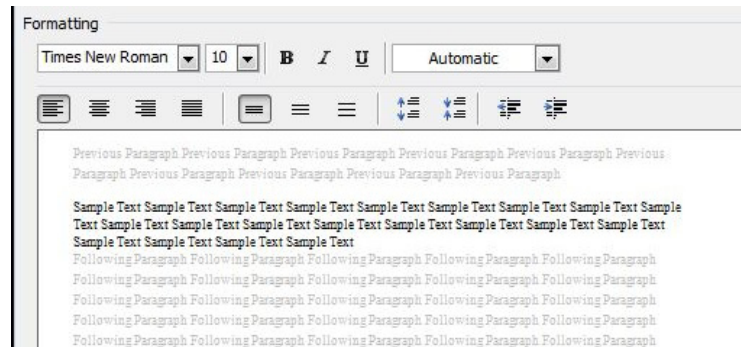
There is also an option to allow you to assign a shortcut key to the style to enable you to apply it easily.

#### ► To set formats for a style

1. Click on the **FORMAT** button to define the formatting for the style and assign a short key to apply the style
2. When all options are determined you can see a preview of the formatted style in the preview area of the dialog.
3. When all selections have been made click **OK**.
4. All paragraphs using the style are automatically updated.

#### OR

1. Use the limited format options within the create new style dialog box

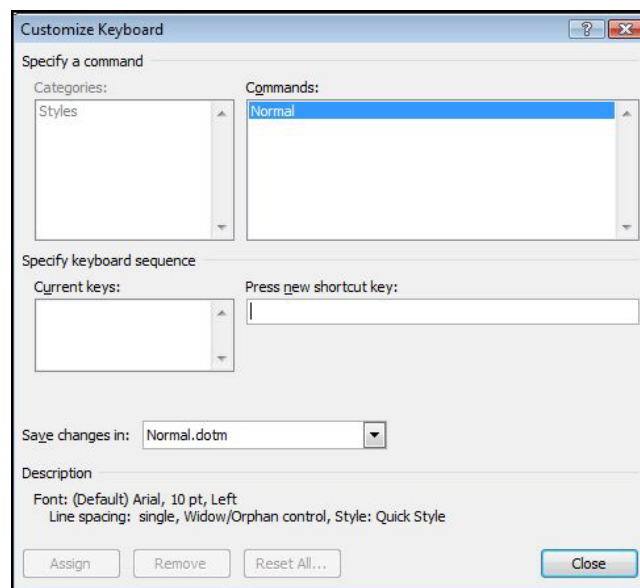


### Shortcut Key

This is extremely useful especially for typists as they do not need to stop in the flow of their work to apply styles they just hit a key combination to apply the predefined format for the text or paragraph they are currently typing, without leaving the keyboard.

### To set shortcut key

## Mouse



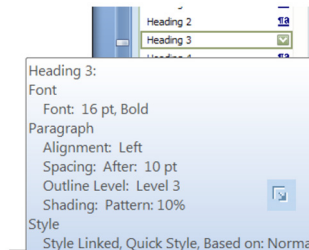
1. While in the create style or modify style dialog click on the format button in bottom left corner
2. Choose **SHORTCUT KEY** a dialog will appear.
3. In the press new shortcut key area press a combination of keys to apply the style. (use **CTRL** or **ALT** or **SHIFT** within your combination as these keys would not normally be used within typing.)
4. If the combination has already been assigned it will say what it has been assigned to if not it will say unassigned.



5. When you have decided upon your key combination click on the assign button.
6. If you change your mind you may always click on the remove button and then assign a different set of keys as the shortcut key.
7. When complete click on close
  - *Select text or click in a paragraph use your shortcut key combination to apply your desired style*

## Modifying A Style

### ► To update a style



1. Select text that is styled with the style attributes that you want to change.
  - *E.G. to change the attributes of the Heading 1 style, select text that has the **HEADING 1** style applied.*
2. To **VIEW** the attributes of a particular style, click the **STYLES DIALOG BOX LAUNCHER**, and then rest your pointer over a style in the list.

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3. Format the selected text with the new attributes that you want. E.G. you might decide that you want to change the point size for the Heading 1 style from 16 points to 14 points.
4. In the **STYLES** task pane or the **STYLES** group on the **HOME** ribbon, right-click the style that you want to change.
5. Click **UPDATE TO MATCH SELECTION**.

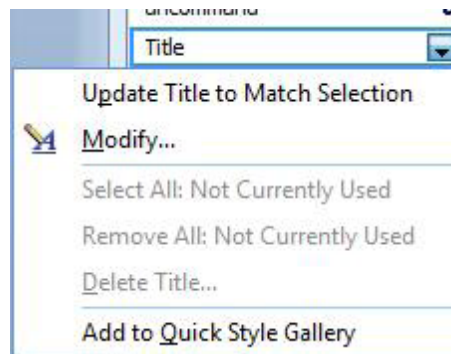
*All text with the style that you changed will automatically change to match the new style that you defined. If you changed the styles in a document and the styles are not updating the way you expected, click the **STYLES** Dialog Box Launcher, and then click **STYLE INSPECTOR** to find out whether text was manually formatted instead of formatted by using styles.*

Styles can also be created and updated using the **MODIFY** command from the **MANAGE STYLES** dialog. You can set many more options for the style if you create or redefine it in this way.

*A Character Style can only change Fonts and Language formats, but it can be applied to a selection of less than a paragraph.*

#### ► To modify using the task pane

##### Mouse



1. Open the styles taskpane as previously described
2. Move your mouse over the style you wish to edit
3. Click on drop down arrow to the right of the style
4. Choose **MODIFY** to open the **MODIFY** dialog
  - *The modify dialog looks the same as the create style dialog but some options may not be available to you anymore because of the nature of the style or because certain options are uneditable after creation.*
5. Once your modifications are complete click on **OK**
6. Wherever that style has been used throughout your document the format should now update.

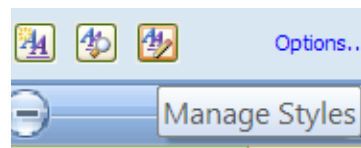
## Manage Styles

### ► To access the Style dialog:

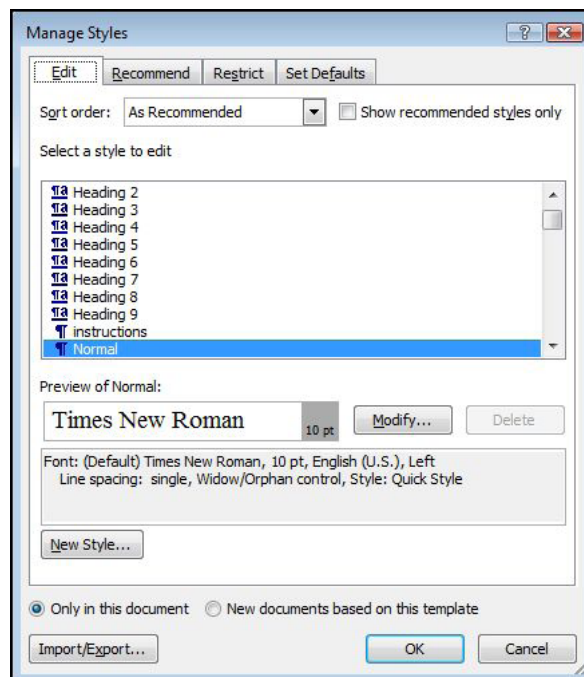
Mouse



1. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
2. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.



3. Find the name of the style you wish to change
4. Select style and click **MODIFY**
5. Choose **MODIFY** to open the **MODIFY** dialog



- *The modify dialog looks the same as the create style dialog but some options may not be available to you anymore because of the nature of the style or because certain options are uneditable after creation.*
6. Once your modifications are complete click on **OK**

- Wherever that style has been used throughout your document the format should now update.

## Import and export styles

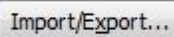
### Copying Styles Between Documents

The styles that you redefine, or new ones that you create, can only be used in the current document. (By default) Clearly you may want to copy a style into another document, rather than recreating or redefining it from scratch.

#### ► To copy a style from one document to another:

##### Mouse

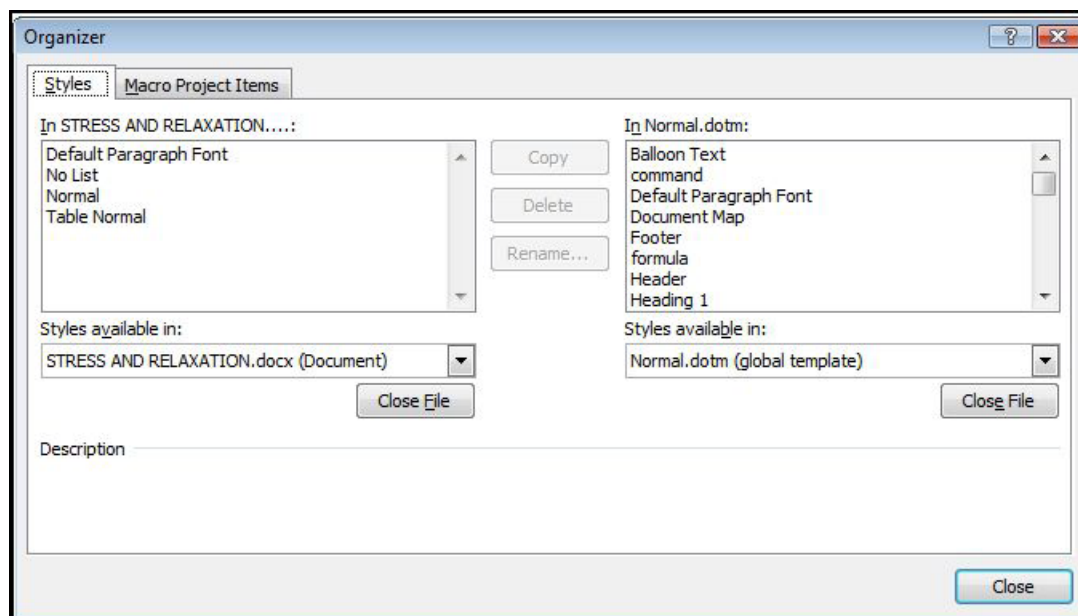
- Open the file which currently contains the styles you wish to export.
- Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.



- Click on the **IMPORT/EXPORT** button
- Click **CLOSE FILE** to close the active document and its attached template **OR** close the Normal template.

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5. Then click **OPEN FILE**, and open the template or file you want.
6. Click the items you want to copy in either list, and then click **COPY**
7. The list of styles on the left-hand side of the dialog belongs to the current document.

► To specify the document which will be receiving the new style(s):

1. Click on the **CLOSE FILE** button (on the right-hand side of the dialog)
2. The button will then change to an **OPEN FILE** button, click on this to select the target document
3. Select the style(s) in the left-hand list, and click on the **COPY** button.

*To select more than one style, click on the first style and then hold down CTRL and click on the other required styles. To select all the styles, click on the first, then hold down SHIFT and click on the last style. If you copy a style to a file that already contains that style, E.G. Heading 1, you will receive a message asking for confirmation. In addition to copying styles, you can delete or rename styles in either list using the DELETE and RENAME buttons. When you delete a style, you are asked for confirmation.*

### Copying To/From Document Templates

If the document where the styles have been changed was based on a particular Template, the new styles can be copied back **to** the Template. This means that new documents based on the Template will automatically pick up the style changes. However, to update existing documents with changes in the Template, you would have to copy the styles **from** the Template.

### Updating the Template

The procedure for copying style changes in a document back to its underlying Template is a very similar to copying to another document (see previous page).

► To update the template with the new styles:

Mouse

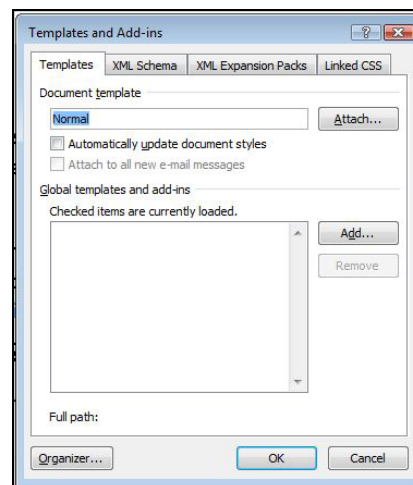
1. Open the file which currently contains the styles and click on the **MANAGE STYLES** button in the **STYLES** task pane a dialog opens.
2. Click on the **IMPORT/EXPORT** button
  - *Word initially assumes that you want to copy the styles to NORMAL.DOTM*
3. Select the underlying document template by:
  - *Click on the **CLOSE FILE** button (on the right-hand side of the dialog)*
  - *The button will then change to an **OPEN FILE** button, click on this to select the target template*
4. Select the style(s) in the left-hand list, and click on the **COPY** button. You will be prompted for confirmation if the styles you are copying already exist in the template.
5. Click on **CLOSE** to close the **ORGANISER** dialog. You will then be asked whether you want to save the changes made to the template. The same prompt occurs when you save and close the current document. It is a final chance to either accept or reject the changes to the document template.

Updating A Document

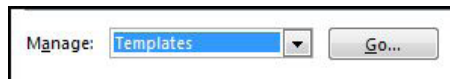
The method of copying styles from the template back into existing documents is much simpler.

To Update Document Styles With Template Styles:

Mouse



1. Open the document which needs updating
2. Click the **FILE TAB** and click on **OPTIONS** select **ADD-INS**. Select which add-in to manage from the drop down box near the bottom of the screen (templates) and click **GO** a dialog appears



3. The name of the underlying document template should appear in the dialog. To copy the styles into the current document:
4. Click in the **AUTOMATICALLY UPDATE DOCUMENT STYLES** check-box
5. Click on **OK** to return to the document
6. The styles in the document will be updated and will continue to be updated automatically if any other changes are made to the template in future.

## Defining styles automatically

### Using Autocorrect

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efficiency      reliability      delivery

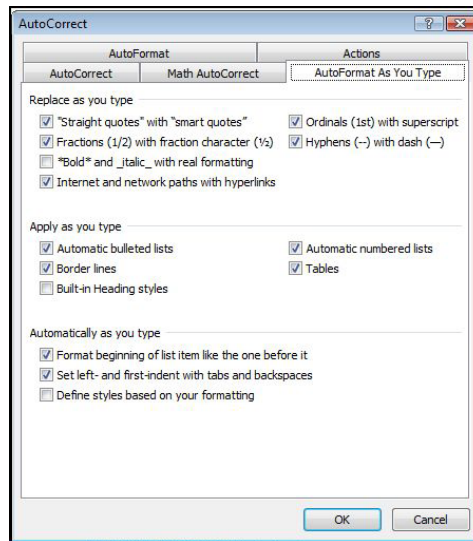
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To have Word automatically define styles, from the AutoCorrect options.

1. Open the **AUTOCORRECT** options these are accessed by
  - going to the **FILE TAB, OPTIONS**
  - Go to the **PROOFING** tab on the left
  - Go to the **AUTOCORRECT OPTIONS** button in the **AUTOCORRECT** section on the right.

*Styles can also be updated automatically when manual formatting is applied to text that is already formatted with a specific style.*

2. Go to the **AUTOFORMAT AS YOU TYPE** tab
3. Check **DEFINE STYLES BASED ON YOUR FORMATTING**

### Using The Style Option

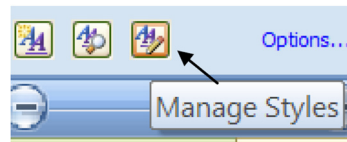
► To have Word automatically update a style:

#### Mouse

1. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,



2. Click on the **MANAGE STYLES** button, in the **STYLES** task pane a dialog opens.

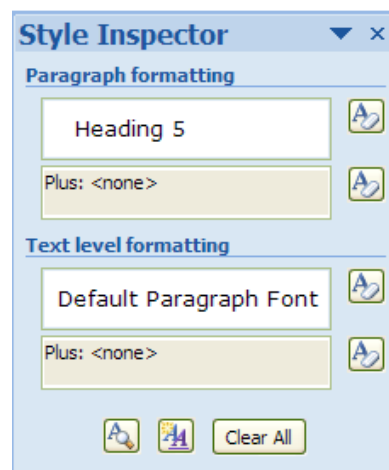


3. Find the name of the style you wish to change
4. Select style and click **MODIFY**
5. Select the **AUTOMATICALLY UPDATE** check box.

*The Normal style cannot be updated automatically.*

## Style Inspector

The style inspector gives you a preview and analysis of the style of any text you happen to click on with options to clear any aspects of the style that don't meet with your approval or to clear all. For a further breakdown click on the reveal formatting button on the bottom left of the window to give a complete breakdown of your style



### ► To show style inspector

#### Mouse

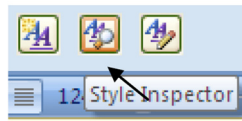


1. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**,
2. Click on the **STYLE INSPECTOR** button, in the **STYLES** task pane a dialog opens.



► To reveal formatting

Mouse



1. Open the style inspector
2. Click on the button on the bottom left of the window
3. The **REVEAL FORMATTING** task pane opens.

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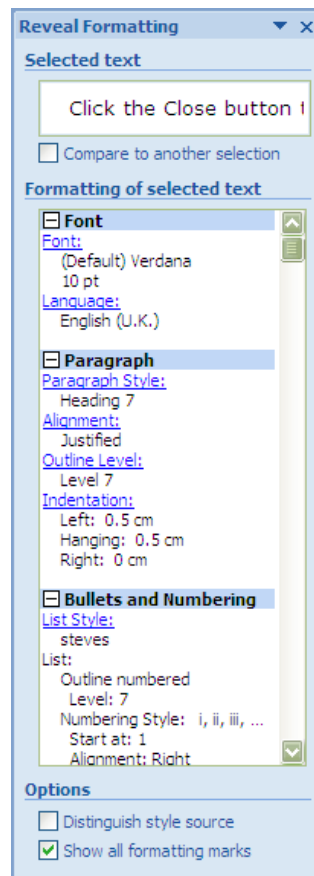
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Email: [laura.vella@ntu.ac.uk](mailto:laura.vella@ntu.ac.uk)

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4. Clicking on any of the blue **HYPERLINKS** opens the dialogs to edit any part of that style it is a very useful tool for editing your style.

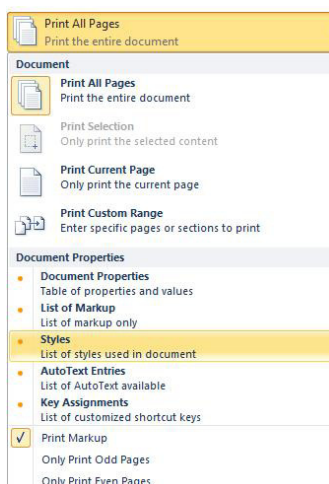
#### ► To close style inspector

##### Mouse

1. Click the cross on top right of dialog

#### Printing Styles

To print a list of styles from the active document select Styles in the **PRINT WHAT** list box of the **FILE, PRINT** Window. (For more information see the printing section in the Introductory manual)



## Quickstyle sets

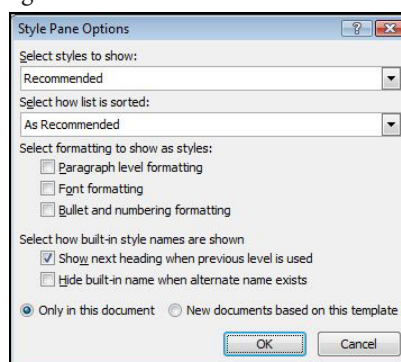
In Microsoft Office Word 2010, QuickStyles are sets of styles that are designed to work together to create an attractive and professional looking document. In most cases, you won't change styles in a Quick Style set because the styles have been designed to complement one another, and it's easier to use a different Quick Style set. But, under certain circumstances, you might want to change the attributes of a style in a Quick Style set.

### Adding & Removing Styles From QuickStyle Gallery

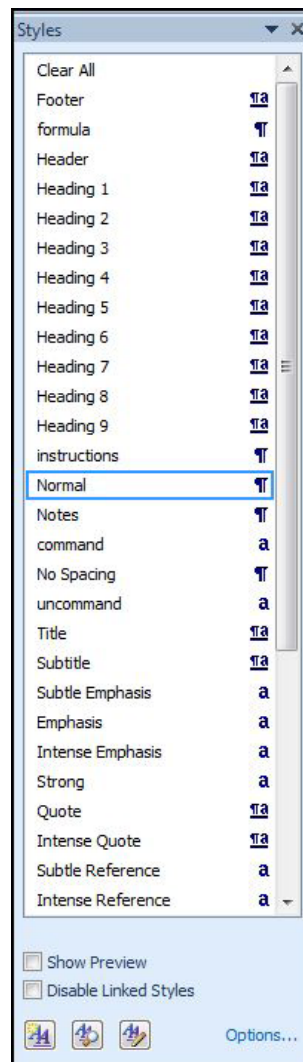
Occasionally, a style is removed from the Quick Styles gallery, or it does not appear in the list of styles. When that happens, it's easy to move a style to the Quick Styles gallery so it's available for you to use.

#### ► To show styles in taskpane

1. On the **HOME** ribbon, click the **STYLES DIALOG BOX LAUNCHER**, to open the **STYLES** task pane and then click **OPTIONS** bottom right hand corner



2. Under **SELECT STYLES TO SHOW**, click **ALL STYLES**.



3. All styles should now appear in taskpane

► To add styles to QuickStyle gallery

1. Move your mouse over the style you wish to appear in the **QUICKSTYLES GALLERY** a drop down arrow will appear to the right of the style.
2. Click drop down arrow and select **ADD TO QUICK STYLE GALLERY**

► To Remove a style from the Quick Styles gallery

1. On the **HOME** ribbon, in the **STYLES** group, right-click the QuickStyle that you want to remove from the gallery.
2. Click **REMOVE FROM QUICK STYLES GALLERY**.

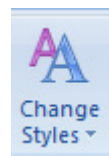
Or

1. From the styles taskpane

2. Move your mouse over the style you want to remove from the **QUICK STYLES GALLERY** a drop down arrow will appear to the right of the style.
3. Click drop down arrow and select **REMOVE FROM QUICK STYLE GALLERY**

*Removing a style from the Quick STYLES gallery does not remove the style from the entries that appear in the Styles task pane. The STYLES task pane lists all of the styles in the document.*

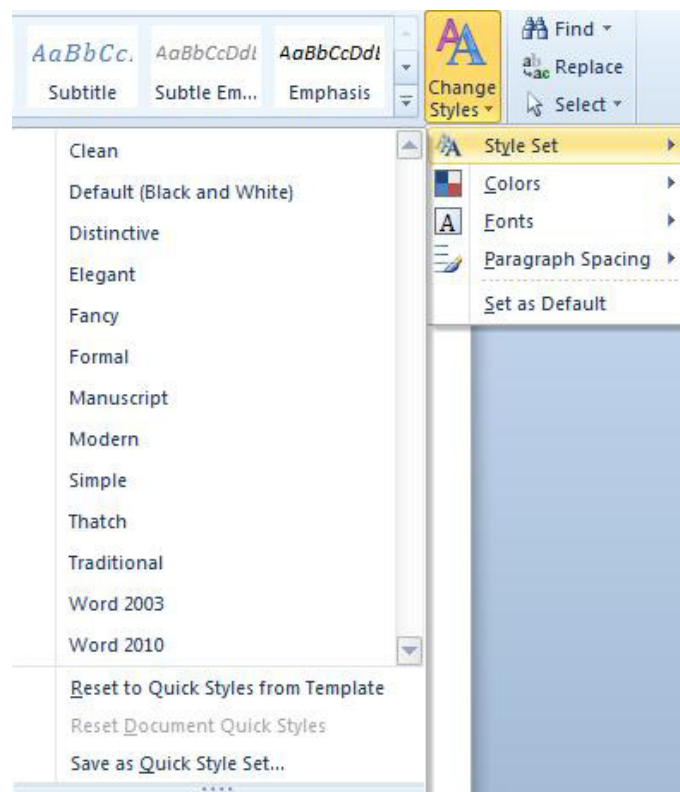
## Changing Style Sets



Changing the style sets is relatively easy

### ► To change a style set

#### Mouse

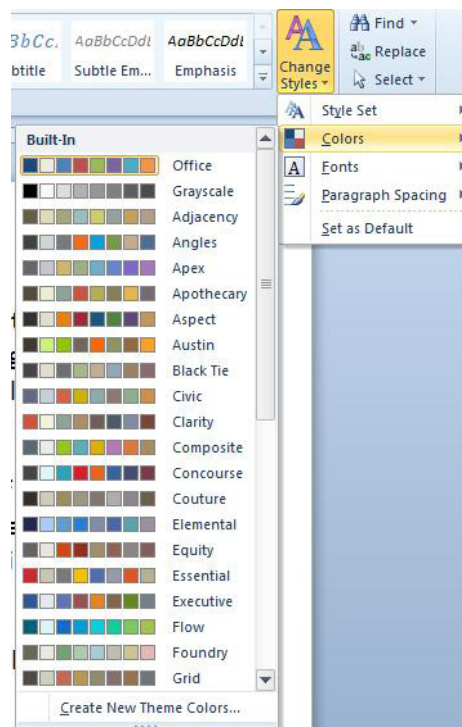


1. Click on the change styles button to the right of the styles group
2. Move down to style sets and a selection of different style sets appear

3. You may change style sets as often as you wish

## Modifying Style Sets

The styles in a style set are made up of colours, fonts, and paragraph spacing these can be changed in a few clicks. Your document will then be updated with your choices when you have mixed and matched these various components you may save your selections to another style set allow you to use it in the future.



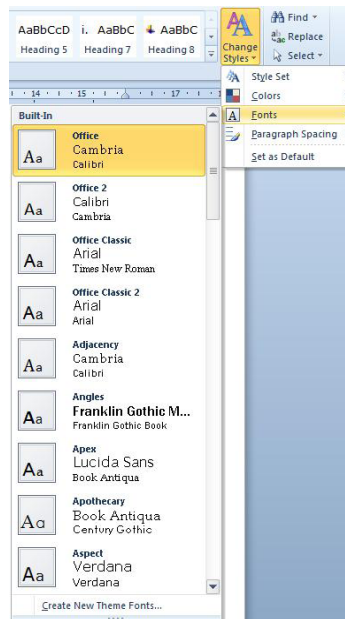
### ► To change colours scheme

1. Select style set you wish to modify
2. Click on the change styles button and move down to colours
3. Select a colour scheme for your style set
4. Your colour scheme will have updated your style set and document.

### ► To change font scheme

#### Mouse

1. Select style set you wish to modify
2. Click on the change styles button and move down to fonts



3. Select a font scheme for your style set
4. Your font scheme will have updated your style set and document.

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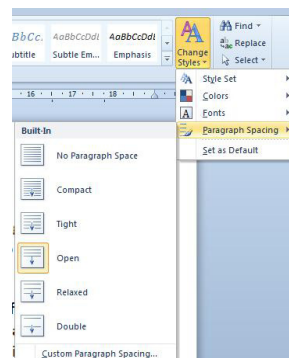
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## ► To change Paragraph spacing's

### Mouse



1. Select style set you wish to modify
2. Click on the change styles button and move down to Paragraph spacing
3. Select a spacing scheme for your style set
4. Your spacing scheme will have updated your style set and document.

## Saving A Style Set

Whether you have created all your styles manually or have modified existing styles add used ones to the QuickStyle gallery and remove any you do not need so that the gallery reflects all the styles you will use in a document(s) you might be using or creating in the future and we can then save this as a style set that can be transferred to other machines or quickly accessed on this one if you use several style sets

## ► To save a style set

### Mouse

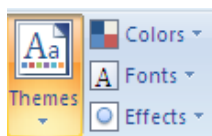
1. Make sure all styles you wish in style set are added to the gallery
2. Make sure all styles you do not wish are removed from gallery
3. Ensure all styles have been modified to your liking
4. Click on the change styles button
5. Move to the style set selection
6. Below available style sets click on save as QuickStyle set
7. The save a QuickStyle set dialog opens
8. Enter a style set name (it is best not to change location because word may not be able to locate it in the future and add it into the menu)
9. Click on save
  - You may load this style set at any time by following the instructions for changing style sets previously described.



## Document themes

### Apply A Document Theme

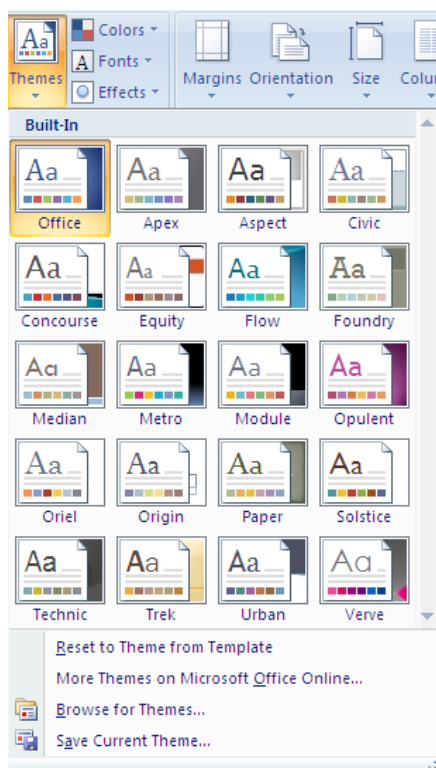
Themes in 2010 have been enhanced by adding many more themes for you to choose from than in 2007. To give you more choice when producing professional looking and coherently formatted documents.



- **theme:** A set of unified design elements that provides a look for your document by using colour, fonts, and graphics.

You can quickly and easily format an entire document to give it a professional and modern look by applying a document theme. A document theme is a set of formatting choices that include a set of theme colours, a set of theme fonts (including heading and body text fonts), and a set of theme effects (including lines and fill effects).

Programs such as Microsoft Office Word, Excel, and PowerPoint provide several predefined document themes, but you can also create your own by customizing an existing document theme, and then by saving it as a custom document theme. Document themes are shared across Office programs so that all of your Office documents can have the same, uniform look.



## ► To Apply a document theme

### Mouse

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEMES**. To select a theme.

### Or


1. If a document theme that you want to use is not listed, click **BROWSE FOR THEMES** to find it on your computer or a network location.
2. Select a theme to apply it to your current document
  - To search for other document themes on Office Online, click **Search Office Online**.

**CUSTOM** is available only if you created one or more custom document themes. For more information about creating custom document themes.

## Customise A Document Theme

To customise a document theme, you start by changing the colours, the fonts, or the line and fill effects that are used. Changes that you make to one or more of these theme components immediately affect the styles that you have applied in the active document. If you want to apply these changes to new documents, you can save them as a custom document theme.

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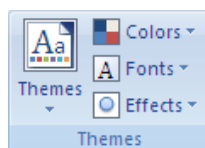
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## Theme Colours



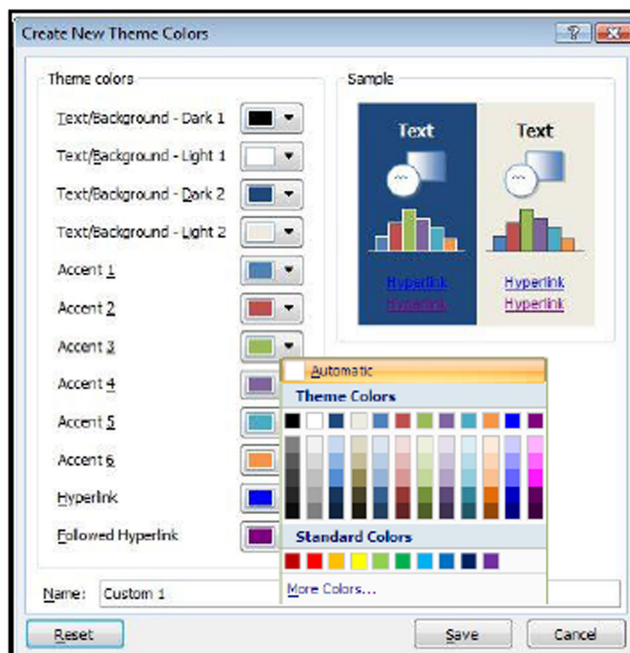
Theme colours contain four text and background colours, six accent colours, and two hyperlink colours. The colours in the **THEME COLOURS** button represent the current text and background colours. The set of colours that you see next to the **THEME COLOURS** name after you click the **THEME COLOURS** button represent the accent and hyperlink colours for that theme. When you change any of these colours to create your own set of theme colours, the colours that are shown in the **THEME COLOURS** button and next to the **THEME COLOURS** name will change accordingly.

### ► To customise the theme colours

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **COLOURS**.



2. Click **CREATE NEW THEME COLOURS** the following dialog is displayed



3. Under the **CREATE NEW THEME COLOURS DIALOG**, click the drop down button of the theme colour element that you want to change.

4. Select the colours that you want to use.
  - Under **SAMPLE**, you can see the effect of the changes that you make.
5. Repeat step 3 and 4 for all of the theme colour elements that you want to change.
6. In the **NAME BOX**, (bottom) type an appropriate name for the new theme colours.
7. Click **SAVE**.

*To return all theme colour elements to their original theme colours, you can click **RESET** before you click **SAVE**.*

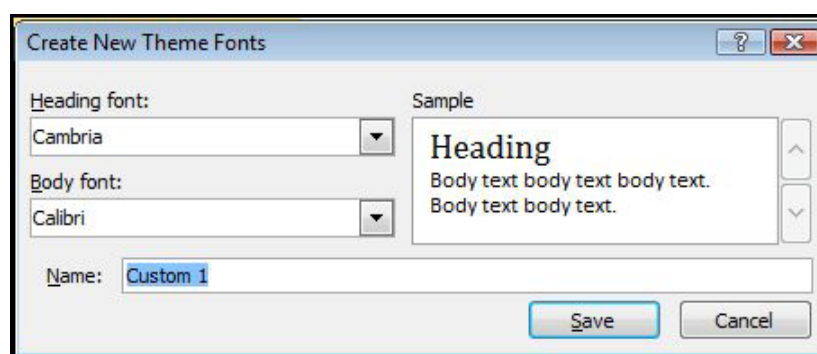
## Theme Fonts

Theme fonts contain a heading font and a body text font. When you click the **THEME FONTS** button, you can see the name of the heading font and body text font that is used for each theme font below the **THEME FONTS NAME**. You can change both of these fonts to create your own set of theme fonts.



### ► To customise the theme fonts

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEME FONTS**.
2. Click **CREATE NEW THEME FONTS**.
3. In the **HEADING FONT** and **BODY FONT** boxes, select the fonts that you want to use.



4. The sample is updated with the fonts that you select.
5. In the **NAME** box, type an appropriate name for the new theme fonts.
6. Click **SAVE**.

## Theme Effects

Theme effects are sets of lines and fill effects. When you click the **THEME EFFECTS** button, you can see the lines and fill effects that are used for each set of theme effects in the graphic that is displayed with the **THEME EFFECTS** name. Although you cannot create your own set of theme effects, you can choose the one that you want to use in your own document theme.

► To select a set of theme effects



1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEME EFFECTS**.
2. Select the effect that you want to use.

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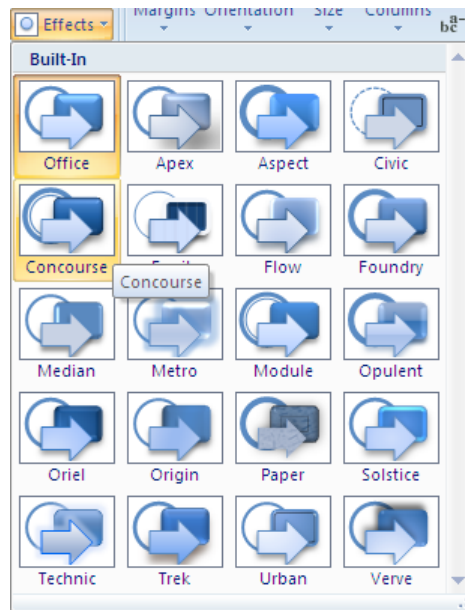
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## Save A Theme

Any changes that you make to the colours, the fonts, or the line and fill effects of a document theme can be saved as a custom document theme that you can apply to other documents.

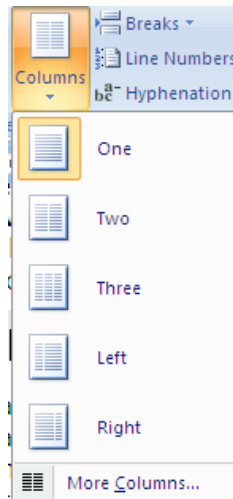
### ► To save a document theme

1. On the **PAGE LAYOUT** ribbon, in the **THEMES** group, click **THEMES**.
2. Click **SAVE CURRENT THEME**.
3. The **SAVE CURRENT THEME** dialog appears
4. In the **FILE NAME** box, type an appropriate name for the theme
5. Click **SAVE**.

*A custom document theme is saved in the Document Themes folder and is automatically added to the list of custom themes.*

## Columns

You can setup pages in documents where the text is laid out “newspaper style” in columns. Word will automatically “section off” the area where the columns are active, so you will see continuous section breaks (see section breaks) appear above and below the column area.



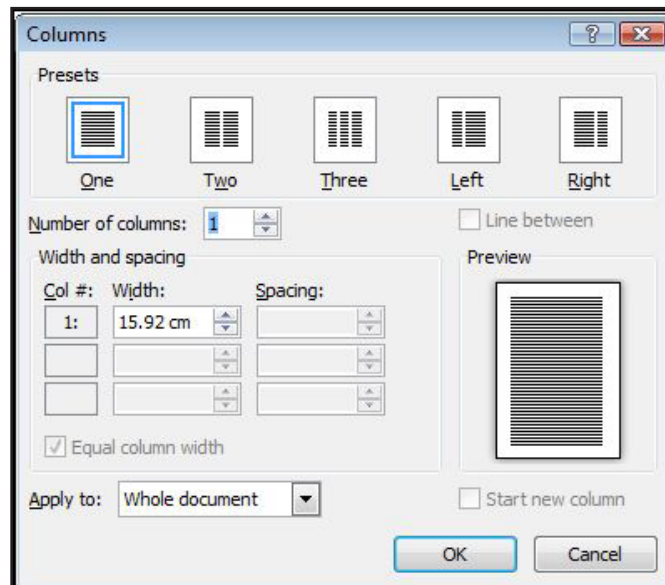
## Newspaper Columns

A columnar layout can either be tabular (where the information is divided both vertically and horizontally) or snaking columns, which have only a vertical division. The 'snaking' effect means that once column 1 is full, the text "snakes" on to the top of the next column, just like in a newspaper.

### ► To set up newspaper columns:

#### Mouse

1. Select the text you wish to have in columns OR click at the point you wish the columns to start.
2. Go to the **PRINT LAYOUT** ribbon and then to the **PAGE SETUP** group. Click on the **COLUMNS** button
3. Select the number of columns of columns you wish from the displayed list.




OR

1. Click on **MORE COLUMNS** to display the **COLUMNS** dialog box.
2. Type in the number of columns required,
  - *E.G. 3, adjust the space between columns if necessary (the default is 1.25cm).*

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3. You have the choice of having lines separating the columns. Lines will be the length of the longest column. Lines will only be printed if there are two or more columns.
4. Click on the box at **LINE BETWEEN**.
5. To see the line use **PRINT PREVIEW** or **PRINT LAYOUT** view.
6. If you wish to have columns of different widths ensure you untick the **EQUAL COLUMN WIDTH** checkbox
7. When all options are selected click **OK** to apply your columns

### Entering Text

Once your document has been set up with a columnar layout, you can enter text in the usual way. Make sure you are in **PRINT LAYOUT** View; otherwise you will not see a true representation of how your document will print out.

### Copying, Moving And Deleting Text Between Columns

Text can be easily moved and copied between columns in Word once they have been set up.

#### To Move, copy and delete text between columns:

##### Mouse

1. Select the text to be copied and copy it with your preferred method.
2. Place the **INSERTION POINT** at the point where you wish to copy it to and press the **PASTE** icon.
3. Select the text to be moved and cut it with your preferred method.
4. Place the **INSERTION POINT** at the point where you wish to copy it to and press the **PASTE** icon.
5. Select the text to be deleted and press the **DELETE** key..

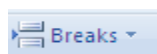
### Column Breaks

If you want to end a column before the bottom of the page, you will need to insert a column break.

Ensure show/hide characters are visible or you will not be able to see where the break is in case you need to delete it.

#### ► To insert a column break:

##### Mouse



1. Click on **BREAKS** from the **PAGE SETUP** group on the **PRINT LAYOUT** tab
2. Select **COLUMN BREAK** the break will be inserted. It can be deleted just like a page break or any other character with the **DELETE** key on the keyboard.

**OR**

1. Keyboard
2. Press **CTRL SHIFT ENTER**.
3. This will force a new column to appear for you to use. It behaves much like a forced page break. Just imagine each column is like a separate page and column breaks rather than page breaks are used to end that column and allow you to the top of the next.

***In DRAFT view, columns are displayed as one column continuing down the page. Each time there is a snap to a new column this is shown as a dotted line with column Break labelled on it. If you try to use the columns button in this view, Word will change you to PRINT LAYOUT view.***

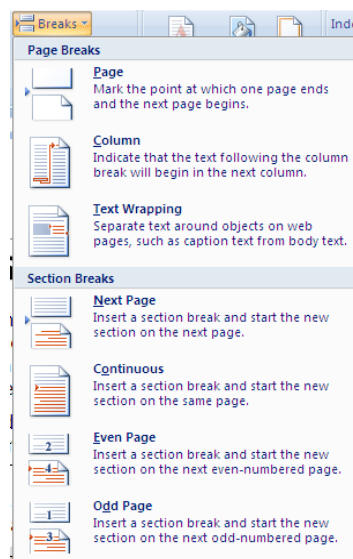
## Sections

Dividing a document into sections allows you to apply different page set-up options in different pages of your document.

- *E.G. you might want page 3 of your document in landscape because it contains a very wide table, but the rest of the document is a report that needs to be in portrait orientation.*

You may want different margin sizes in different parts of your document or page numbering restarting in different formats at different points. Columns use sections so that each section can be treated differently from the others.

Word sometimes adds the section breaks to a document for you. especially when you change the format for a selection.



***On the far left corner of the status bar there is an indicator that tells the user which page and in what section the insertion point is currently working. E.G.: Page 13 Section 3.***

## Section Breaks

There are three types of break that will be examined here.



In **PRINT LAYOUT** view, breaks are invisible unless you **SHOW/HIDE CHARACTERS**. This feature lets you see all the special characters that make formatting you have carried out, visible, other than text formatting. That is – spaces, carriage returns and tabs as well as breaks. You will also see other little symbols to indicate such things as table cells. To see the characters, click on the **SHOW/HIDE CHARACTERS** button. On the **HOME** ribbon, **PARAGRAPH** group.

- You can also switch to **Draft** view and see breaks without activating other commands but this view can be confusing, especially when working with columns.

**A page break is not a section break**

### Continuous Section Breaks

Use the continuous section break to effectively make a fresh start in your document. Whatever kinds of formatting and other items went before – columns, fields entered, styles etc., a continuous break makes the section above it just that, a section. It also allows you to change the page set-up options for that section only without affecting the whole document.

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### Next Page Section Breaks

Inserts a section break, breaks the page, and starts the new section on the next page. This feature can be used

- *E.G. to insert different headers and footers in the new page section.*

### Odd Page And Even Page Section Breaks

Useful when your document is set up with double-sided printing and mirror margins, these section breaks allow you to determine whether the next page should be odd (print on the right-hand side of the double-page) or even (print on the left-hand side of the double-page).

### What Is Stored Within A Section?

A section can have its own unique headers and footers, margins and page orientation. It may also have a different number of snaking columns to the rest of the document.

### Creating A Section Break

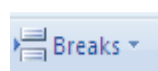
Sometimes Word automatically creates section breaks for you.

- *E.G. when you make one of your pages landscape, or if you format some of the text to be displayed in a different number of columns. Otherwise, you have to create the section break manually.*

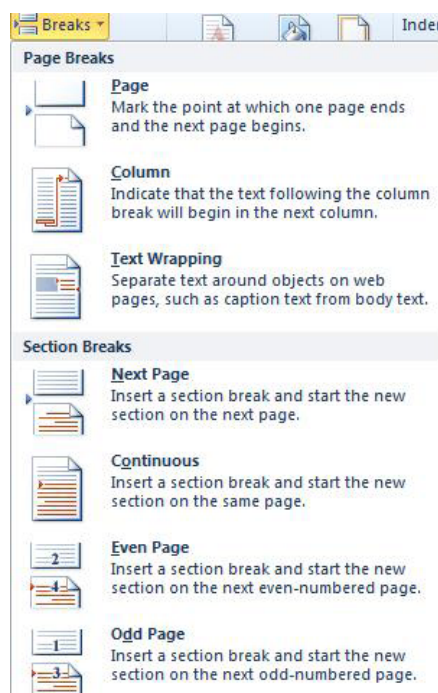
### To create a section break:

#### Mouse

1. Click on **BREAKS** from the **PAGE SETUP** group on the **PRINT LAYOUT** ribbon



2. Select from the menu that appears.
  - *2010 gives a little explanation by the side of each option.*



3. The section break will appear.
4. Select **NEXT PAGE** if you want the section start to be on the next page,

Or

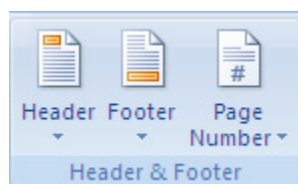
1. Choose **CONTINUOUS** if the section should run through on the same page.

Or

1. Choose **ODD PAGE/EVEN PAGE** to determine which side of the book the new section should begin on.  
The section break is displayed just before the new section:

*Word initially copies the header and footer, margin settings and page orientation into the new section. The margin and orientation settings can be easily changed from the Page Set-up dialog, since Word will assume you want to only affect the current section.*

## Handling Headers And Footers

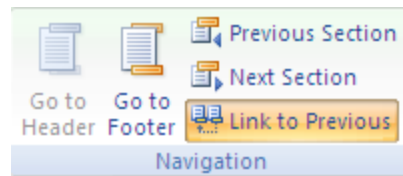


The headers and footers in the new section will be linked to the previous section. This means that if you change the header or footer in the first section, those in the second section will automatically change.

► To unlink a header/footer from the previous section:

Mouse

1. Position the insertion point in the second section



2. Choose **HEADER** or **FOOTER** from the insert ribbon **HEADER & FOOTER** group and select **EDIT HEADER AND FOOTER** from the bottom of the displayed options
3. Click on the **LINK TO PREVIOUS BUTTON** to turn off the link to deselect the highlighted button  
*The link between any other two sections can be broken in the same way. However sometimes you may want to keep the link, particularly if you are working in a Master Document - see the section on Master Documents later in this manual.*

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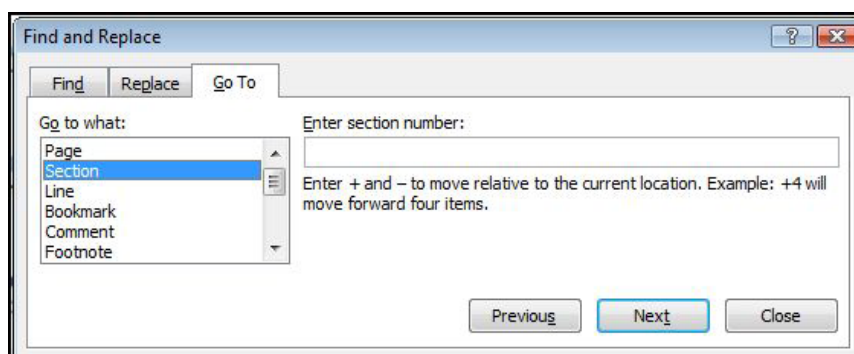
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## Moving Between Sections

You can quickly move from one section to another by using the **F5** key. The **GOTO** tool



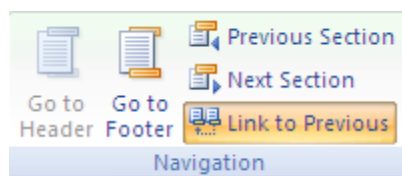
### ► To move to a specific section:

#### Keyboard

1. Press **F5** to open the goto dialog. Click on **SECTION**, then type in the section number
2. Click on the **GO TO** button.

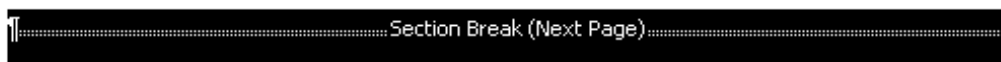
#### Or

1. Choose **HEADER** or **FOOTER** from the insert ribbon **HEADER & FOOTER** group and select **EDIT HEADER AND FOOTER** from the bottom of the displayed options.



2. Go to the **DESIGN** ribbon, and use the navigation buttons to move from section to section.

## Removing A Section Break



You may need to merge two sections into one by deleting a section break.

► To delete a section break:

Mouse

1. Select the section break to be removed and Press **DELETE**
  - *The two sections would then become one section. It is important to note that this new section inherits all the page set-up, column and header/footer settings from the second of the two sections.*

### Section Properties

In **PRINT LAYOUT** view and with the **SHOW/HIDE CHARACTERS** feature active, double click any of the continuous section breaks in the document. The **PAGE SET-UP** dialog box will appear, usually displaying the **LAYOUT** page. To switch to margins options, click the **MARGINS** ribbon.

You can now adapt the print layout, margins and other options for the section only, as long as you do not change **APPLY TO:** This section. Click the **LINE NUMBERS...** button on the layout page for options on adding a number for each line of text in the section.

### Section Properties

When you set properties in a dialog box such as page orientation header/footers etc you will notice (if applicable) a box somewhere on the dialog showing one of the following options:

- *Apply to this section only*
- *From this point forward*
- *Whole document*

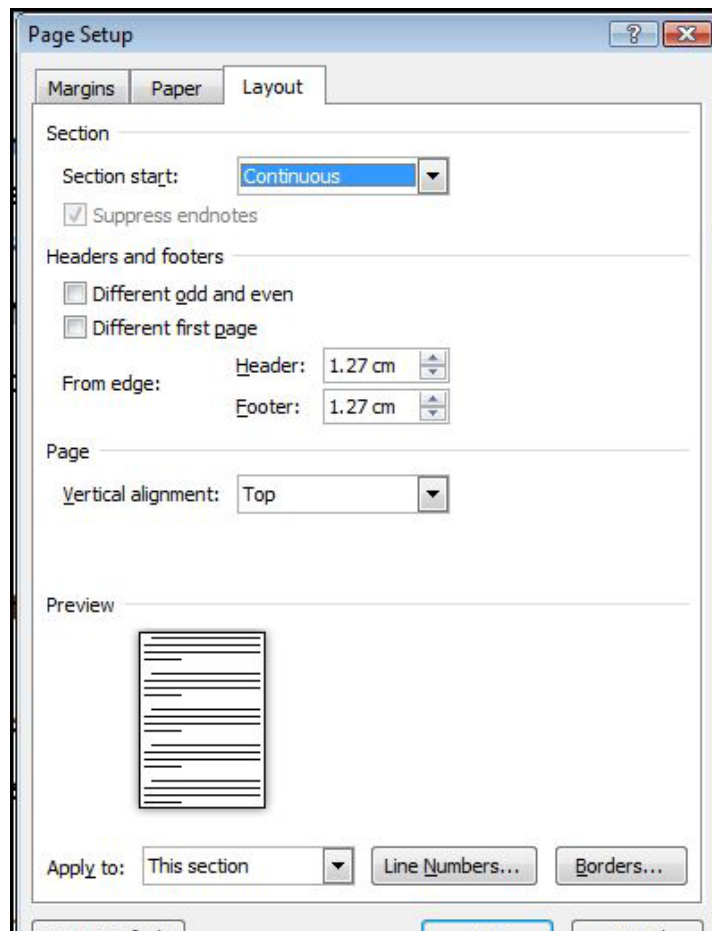
It is important to make the right choice here as it will greatly affect how your document will appear

The following exercise shows settings for headers and footers. please note the “apply to what part of the document box” on the bottom left. Do you really want these settings applied to one section or the whole document.

► To Change the properties for a section:

1. Double click the section break. The **PAGE SET-UP** dialog will appear.
2. In the **PAGE SET-UP** dialog box, set the options you wish to change
3. Click **OK**. Your changes will have affected only the section you are in.





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# Section 3    Outlining / Master documents

**By the end of this section you will be able to:**

- View a document outline
- Outline a document using styles
- Promote and demote outline levels
- Expand and collapse outline levels
- Move and copy outline levels
- Use outline numbering
- Apply preset numbering to headings in a document
- Customise the numbering style for headings
- Remove heading numbering
- Use Master document view
- Create a new Master document
- Convert an existing document into a Master
- Insert sub-documents into a Master document
- Split, merge and remove subdocuments
- Allow multiple-user access to a Master document
- Format Master documents.
- Print Master documents

## Document outlines

### What Is A Document Outline?

An outlined document is one with a structure of headings, at various levels, with associated text. E.G. the chapter of this manual could be presented in outline.

### When To Use Outlining

Outlining is most useful on larger documents or ones with a definable structure. An outlined document is easy to reorganise and restructure.

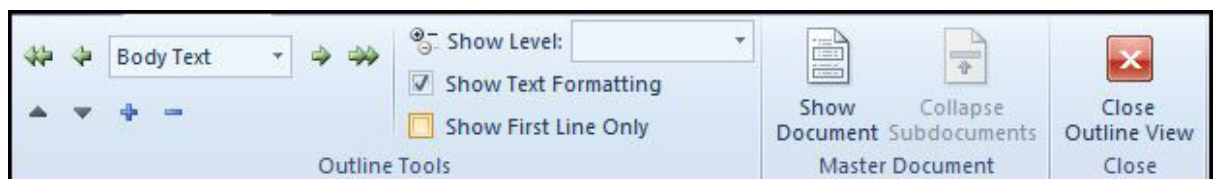
Word also provides standard styles for the levels of an outline, which can be redefined for ease and speed of formatting.

Tables of contents can be readily generated from outlines and the levels of the outline numbered in various ways.

### Outlining A Document

Word provides a special view and nine heading level styles to create outlines. Outline view contains an outline bar to help quickly perform outlining tasks such as changing and displaying various heading levels.

Existing documents can be outlined or a document outline can be created in a new document.






### ► To create an outline in a new document:

#### Mouse

1. Create a new document using your preferred method.
2. Choose **OUTLINE** view from the **STATUS BAR VIEW** buttons

#### OR

1. Go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group.
2. Type a heading. Word automatically formats the text as heading level 1.
3. Press **ENTER** and then type the text for the next heading or body text paragraph. The new entry will have the same level as the previous entry.
4. To change the heading level, do one of the following:

To create a	Click	Press
Lower-level heading - Demote		<b>ALT SHIFT →</b>
Higher-level heading - Promote		<b>ALT SHIFT ←</b>
Paragraph of body text from a heading		<b>ALT SHIFT 5</b> On the numeric keypad

- Repeat steps 4 and 5 for each heading and body text paragraph in the outline.

## Outlining An Existing Document

Outline an existing document to view its organisation or quickly change its structure.

### ► To outline an existing document:

#### Mouse

- If the document is not in outline view, choose go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group. The text of the document is initially paragraphs of body text.
- Select a paragraph to change into an outline heading.
- Change the heading level (see table previous).
- Repeat steps 2 and 3 for each heading.

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Or

1. Select a paragraph to change into an outline heading.

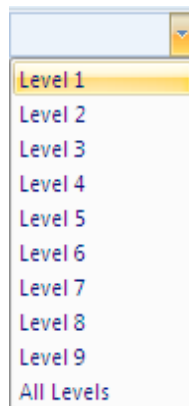


2. Use the drop down box available between the **PROMOTE/DEMOTE** arrows to apply a specific level of heading to paragraph.

*In all other views view, apply heading level styles like any other style.*

## Using An Outline

- To show heading levels:

Mouse

1. On the **OUTLINE** ribbon Use the drop down arrow on the **SHOW LEVEL** box and click **SHOW ALL LEVELS** or press **ALT SHIFT A** to show all heading levels and text.

## Showing Text

Text can be expanded or collapsed below a certain level.

- To expand or collapse text:

Mouse



1. Position the insertion point in a paragraph and click the plus button on the Outline ribbon to expand text below the heading or the minus button to collapse text below the heading.

## Moving Headings And Body Text In An Outline

Moving headings in an outline can quickly restructure a document. When a heading is moved, all subheadings and body text under that heading move with it, if the subheadings and body text are collapsed under the heading.

### ► To move headings:

#### Mouse



1. Drag the heading symbol, or body text symbol, at the left of the heading, or text, up or down to the new position or click the **MOVE UP** or **MOVE DOWN** buttons on the **OUTLINE** ribbon. Word moves all subtext with the heading.

Or

#### Keyboard

1. Position the insertion point in the heading.
2. To prepare the heading to be moved, collapse the heading (see above).
3. To move the heading above the preceding paragraph, press **ALT SHIFT ↑**.
4. To move the heading below the following paragraph, press **ALT SHIFT ↓**.

## Heading style numbering

### Outline Numbering

Outline numbering allows you to create multi-level lists. You can either apply a list format to normal text or use special outlining for text that has styles attached to it. The example below shows what can be achieved with outline numbering.



- 1) Word '2002 advanced course topics include:
  - a) Advanced table features
    - 1) Drawing a table
    - 2) Adjusting column widths and row heights
    - 3) Formulae in tables
  - d) Sections
    - 1) Why use sections?
    - 2) Dividing a document into sections
  - c) Styles

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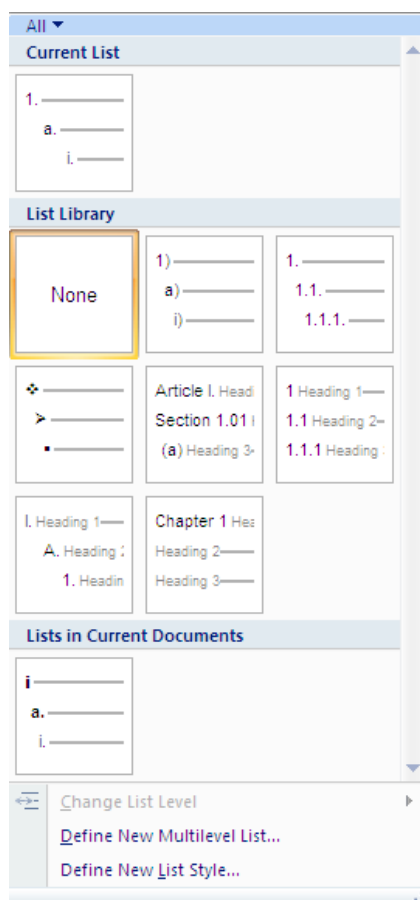
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## Applying A Multi-Level List



You can apply lists using Word's automatic numbering tools that have many different list levels. This is useful if the list you are creating has sub-points which need to line up properly. Word will initially use the top level style for all list items. Use the keyboard to demote and promote items to the required levels.

► To apply a multi-level list:

Mouse

1. Type the list one line under the other.
2. If you want blank lines of space between list items select the lines and use the **SPACE AFTER** setting in the **PARAGRAPH** dialog.
3. Use the drop down arrow to the right of the **MULTI-LEVEL NUMBERING** button to see a selection of multi-level numbering styles after making a selection click to apply style to highlighted list.





► To promote an item:

Mouse



1. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the indent button in the paragraph group or press the **TAB** key.

Or



1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

To demote an item:

Mouse



1. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the outdent button or hold down the **SHIFT** and **TAB** key.

Or



1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

If you use the standard Heading Styles in a document, you can then apply preset or customised numbering to all the Heading Level paragraphs. Numbering can be applied in any of Word's standard views (Draft, Print layout or Outline).

Before you apply Heading Numbering, it may be advisable to apply the Heading Level Styles to the appropriate paragraphs. If you subsequently change a paragraph from one Heading style to another, E.G. from heading 1 to heading 2, the numbering will automatically update.

## To Define A New Multi Level List

If none of the multi level lists suit your purposes it is possible to define one of your own with many options all in one place to set the indents and number styles required for your document

### Level

The **LEVEL** field on the left of the dialog determines which Heading level Numbering you are modifying. To select a different level, either scroll up or down or click on the required level. Initially, Word always defaults to Level 1.

### Number Style

The **NUMBER STYLE:** field controls the style of numbering, whether it is Arabic, Roman numerals, words or bullets. These styles are selected from the drop-down list. You can also specify what text (if any) should appear immediately before and after the number by adding it in the **NUMBER FORMAT** field, and you can change the Font of the number. If you don't want any numbering on a specific level, choose None from the **NUMBER STYLE:** drop-down.

The **START AT:** field enables you to specify if the numbering should start at something other than one.

### Previous Level Number

If you are creating a Legal or similar style, you can choose to make Levels 2-9 include the numbering of the previous level. E.G. if Level 1 style is 1, you can make Level 2 appear as 1.1. This option is not available for Level 1, as Level 1 has no previous level.

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## Number Position

In this section, you can choose the alignment of the numbered text and where you want the numbers aligned. The Text position can be used to specify a precise measurement between the number and the text.

### ► To define new list

#### Mouse



1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom; choose **DEFINE NEW MULTI-LEVEL LIST** a dialog (below) will appear.

2. Select a level to modify (1-9)
3. Click the drop-down list arrow to the right of the **NUMBER STYLE** box. Word offers a variety of different numbering styles for lists, standard Arabic numbers, Roman numerals and so on.
4. Click on the required style from the displayed list.
5. Click on the **FONT** button. The **FONT** dialog opens allowing you to select font options for the selected number style.
6. Add other characters to the **ENTER FORMATTING FOR NUMBER** text box to enhance your number style. Use this option to add extra digits to numbers (e.g. if you want extra decimal places) or to add prefix and suffix characters (e.g. the word "Item", -dash etc.).

## Position



1. Use the **NUMBER ALIGNMENT** drop down box to allow a change in alignment of the numbers to left, right or centre.
2. Either enter a number or use the spin buttons to set the indent for the number or character for this level.
3. Either enter a number or use the spin buttons to set the indent for the text you will type at this level (where you want your text to start).
4. If you want the same set of indents for all levels then click the **SET FOR ALL LEVELS** button the indents chosen will be applied for all levels within your list.
5. You may now work through the levels selecting the alignment , number style and formatting for as many levels as you would use. Click **OK** to complete and create your new multi level list

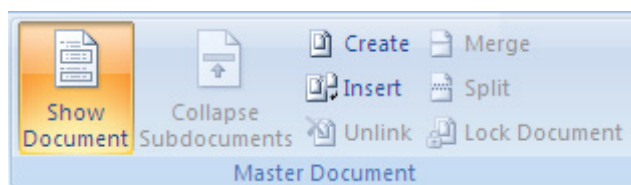
## Remove Heading Numbers

### ► To remove Heading Numbers from the whole document:

#### Mouse

1. Select the heading style you wish to remove the numbers from
2. Select the highlighted numbering button on the home ribbon and select none from the options displayed.

## Master documents

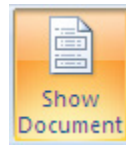


A master document helps you organise and maintain a long document by dividing it into several subdocuments. With a master document, you can work either with the entire long document or with any individual subdocument. You can create a table of contents and an index in the master document, which refers to all the subdocuments, and you can build cross-references between two documents.

You can work with a master document either in Master Document View or Draft View. If you want to work on the entire master document as if it were a single document, work in Draft View. Master Document View, however, is used to create, insert, open and reorganise subdocuments in the long document.

► To change to Master Document view:

Mouse



1. Select **OUTLINE** from the **VIEW** ribbon. Click on the **SHOW DOCUMENT** icon to reveal the buttons below.

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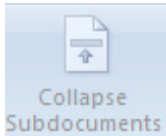
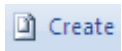

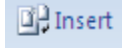
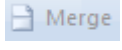
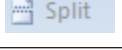
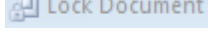


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A brief description of each of the tools is listed below:

	Collapse Subdocuments
	Create a Subdocument
	Remove a Subdocument
	Insert a Subdocument
	Merge two Subdocuments
	Split a Subdocument
	Lock or Unlock the selected document

*It is important to note that the total size of a master document and all of its subdocuments cannot exceed 32MB, excluding graphics. Also, a master document cannot contain more than 8 subdocuments.*

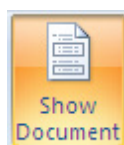
## Setting Up A Master Document

There are three ways to set up a master document:

1. You can create **A NEW MASTER DOCUMENT** from scratch;
- 2) **CONVERT AN EXISTING DOCUMENT** into a master document;
- 3) **COMBINE EXISTING DOCUMENTS** to create a new master document. Whichever method you use, you need to be working in Master Document view.

### 1 -Creating A New Master Document

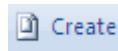
Use this procedure for creating a new master document from scratch



► To create a new master document:

Mouse

1. Open a **NEW** document and switch to **OUTLINE** view
2. Click on **SHOW DOCUMENT** for the document
3. Create subdocuments from the outline by clicking on the **CREATE** button.



4. Move within the main document to create other subdocuments.
5. Save the master document as you would with any other document. All of the subdocuments will be saved in the same location as the master with default names. (First letter of master and subdocument number)

### Creating A Master Document Outline

The outline is simply a list of the topics that your overall document is going to discuss.

When you create the outline for the Long Document, you must use the standard Heading styles (Heading 1-9). It is a good idea to leave a couple of blank lines at the start of the outline, since this will leave space for a table of contents, and an overall document title.

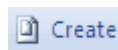
### Create the Subdocuments from the Outline

Each outlined topic together with its subtopics can be divided into a subdocument.

► To create subdocuments using the master document outline:

Mouse

1. Select the headings and text that you want to divide into a subdocument.
2. Click on the **CREATE** Subdocument button.



## Outline view



- Word then encloses each subdocument in a box, displaying a Subdocument icon in the upper-left corner of each box. The subdocuments are also separated with section breaks - the breaks can be seen in **DRAFT** view.

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**Draft view****Saving The Master Document**

To save the master document and all of the subdocuments, save the Master Document as you would any other document. When you assign a filename and click on **OK**, Word automatically creates filenames for all the subdocuments. It uses the first character of the heading that begins each subdocument. E.G. if you have a subdocument that begins with “Chapter 1”, the resulting filename will be “CHAPTER1.DOC”.

If a subdocument filename is going to conflict with an existing file, then Word uses part of the heading text and appends a number for the filename, E.G. “CHAP1234.DOC”.

**2 -Convert An Existing Document Into A Master Document**

It may be advantageous in some situations to convert existing files to be used as master and sub documents.

**► To change a document into a master:****Mouse**

1. In your existing document, switch to **OUTLINE** view and click on **SHOW DOCUMENT** to access the the commands.
2. Use **OUTLINE** view to **PROMOTE** and **DEMOTE** the heading styles as necessary
3. Then highlight the necessary text and create the subdocuments from the outline and save the master document. These two processes are covered in the previous section, “Creating a New Master Document”.

**3 -Combining Documents Into A Master Document**

You may already have several documents which you want to combine together to make a master document.

► To incorporate documents into a master:

Mouse

1. Open a new or existing document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Add some space at the start of the document (press **ENTER** a couple of times) if you wish to leave room for other items.
3. Position the insertion point where you want to insert the first document
4. Click on the **INSERT SUBDOCUMENT** button and select the file from the **INSERT** Subdocument dialog.



5. Repeat these last two steps for all the subdocuments. When you save the Master Document, all the subdocuments retain their original filenames and locations  
*Avoid inserting a subdocument at the top of the Master Document. Try to leave a few blank lines, as this will make it easier to include a table of contents and a title page.*

### Opening A Subdocument

You can either open a subdocument from within the master document or as a completely separate file in the normal way.

► To use the master to open a Subdocument:

Mouse

1. Open the **MASTER** document and switch to **OUTLINE** view
2. Double-click on the subdocument icon belonging to the subdocument you want opened  
*An advantage to opening a file this way, is that you don't have to remember what the file is called or where it is saved.*

### Renaming A Subdocument

If you want to rename a subdocument or save it in a different location, you must open the subdocument from within the master.

► To rename a subdocument:

Mouse

1. Open the master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Double-click on the subdocument icon to open the subdocument you want renamed
3. Use the **FILE TAB, SAVE AS, WORD DOCUMENT** button to open the **SAVE AS** dialog to rename and relocate the subdocument.
4. Close the subdocument, then **SAVE** and **CLOSE** the master document

*Do not use File-Manager to rename or move subdocuments, if you do, it breaks the link between the master document and the subdocument.*

## Splitting A Subdocument

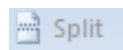
You can split a subdocument if it becomes too large, this would also allow multiple authors to work on parts of the subdocument.

Conversely, you can merge subdocuments if you want to combine small files.

### ► To split a subdocument in two:

#### Mouse

1. Position the **INSERTION POINT** in front of the heading where you want the second subdocument to begin
2. Click on the **SPLIT** button.



## Merging Subdocuments

### ► To merge two subdocuments into one:

#### Mouse

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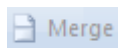
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1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Move the subdocuments next to one another. (If they are not already, using the outlining tools mentioned previously)
3. Click on the subdocument icon of the first subdocument
4. Hold down **SHIFT** and click on the second subdocument's icon
5. Click on the **MERGE** button.

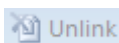


### Removing A Subdocument

#### ► To convert a subdocument into part of the master document:

##### Mouse

1. Switch to **OUTLINE** view
2. Click on the subdocument icon belonging to the subdocument you want to convert
3. Click on the **UNLINK** Subdocument button.



#### ► To completely remove a subdocument from the master document:

##### Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Click on the subdocument icon belonging to the subdocument you want to remove
3. Press **DELETE**

*This action deletes the subdocument from the main document but the subdocument would still exist on the drive and directory where it is stored with the same filename it had before.*

### Sharing A Master Document

One of the great advantages of using master and subdocument documents is that more than one person can be working on them at the same time. When you open a master document, you will be able to edit any of the subdocuments that belong to you - these would be the ones that you created. However, if someone else created one of the subdocuments you can only open it as read-only, unless you unlock it.

Word determines which document belongs to which person by looking at the name of the Author in the Properties.

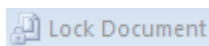
A subdocument for which you are not the author will have a small padlock displayed under the subdocument icon. This means that the subdocument is locked for editing you can only open it as read-only.

## Unlocking A Subdocument

### ► To unlock the subdocument so that you can make changes:

#### Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Click somewhere in the subdocument
3. Click on the **LOCK/UNLOCK Document** button. The padlock symbol should then disappear allowing you to work on the subdocument.



## Multi-User Access

More than one person can work on the same master document at the same time, however they cannot work on the same subdocument.

If you want to work on a subdocument, and let one of your colleagues work on one of the other subdocuments, you should do the following:

So that you can work on a subdocument while someone else accesses the master document do the following. (this is assuming that all path names are not known to you. Otherwise it is a simple matter of closing the document someone else wishes to access.)

### ► To allow others access to the master document:

#### Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Open the required subdocument (unlocking if necessary)
3. Using the **VIEW** ribbon, **SWITCH WINDOWS** command, switch to the master document.
4. Close the master document so that your colleague can open it
5. Your colleague can then follow the same process. He or she should also close the master document after opening the relevant subdocument so that you or another colleague can open it. Any changes made to the subdocuments will update in the master document.

## Formatting A Master Document

You can format a master document just as you would any other Word document. Any formatting you apply when working in the master document will where relevant carry through to the subdocuments. E.G. if you redefine the formatting of one of the heading styles, the change will automatically carry through to the whole master document and its subdocuments. However, because subdocuments are placed in separate sections of the master document some changes you make may not be carried through to the whole document. E.G. if you make one of the subdocuments landscape, this will only affect the subdocument unless you specify in the Page Set-up dialog that it should affect the whole document.

## Styles

The style definitions in the master document override the style definitions in a subdocument. If you insert a subdocument with different style formatting, it will automatically adopt the master document's styles. However when you open the subdocument, it will still retain the old formatting.

## Headers And Footers

The Headers and Footers can be different in each subdocument, since they are in separate sections within the master document. If you want consistency throughout the master document, you should modify each of the subdocuments headers and footers to look the same. (**LINK TO PREVIOUS** option on **DESIGN** ribbon when headers & footers are being edited: see sections) If you don't set headers and footers for any of the subdocuments, the master document's header and footer will automatically appear on every page.

## Tables Of Contents And Indexes

You do not need to create subdocuments for a table of contents or an index in a master document, simply insert the table of contents as part of the master document before the first subdocument. Similarly insert the index typically after the last subdocument.

## Cross-References

If you want to create a cross-reference between two subdocuments, make sure you have the master document open and are working in draft view.

## Printing The Master Document

To print the entire master document print in the usual way.

## Printing A Subdocument

To print one of the subdocuments, you can open it and print it as normal. If a subdocument contains cross-references to another subdocument, you must print the master document so that the cross-references are updated properly.

# Section 4 Templates and forms

By the end of this section you will be able to:

- Understand what templates can be used for
- Create a new template
- Base documents on a saved template
- Add standard text, formatting and graphics
- Use fields to automate templates
- Customise the template with AutoText, macros and toolbars
- Create an on-line form template
- Protect a form template
- Create new documents based on a form template
- Understand what fields can be used for
- Insert fields into a document
- Update fields
- Lock fields to prevent updates
- Unlink fields from source data
- Recognise and use some common long document fields

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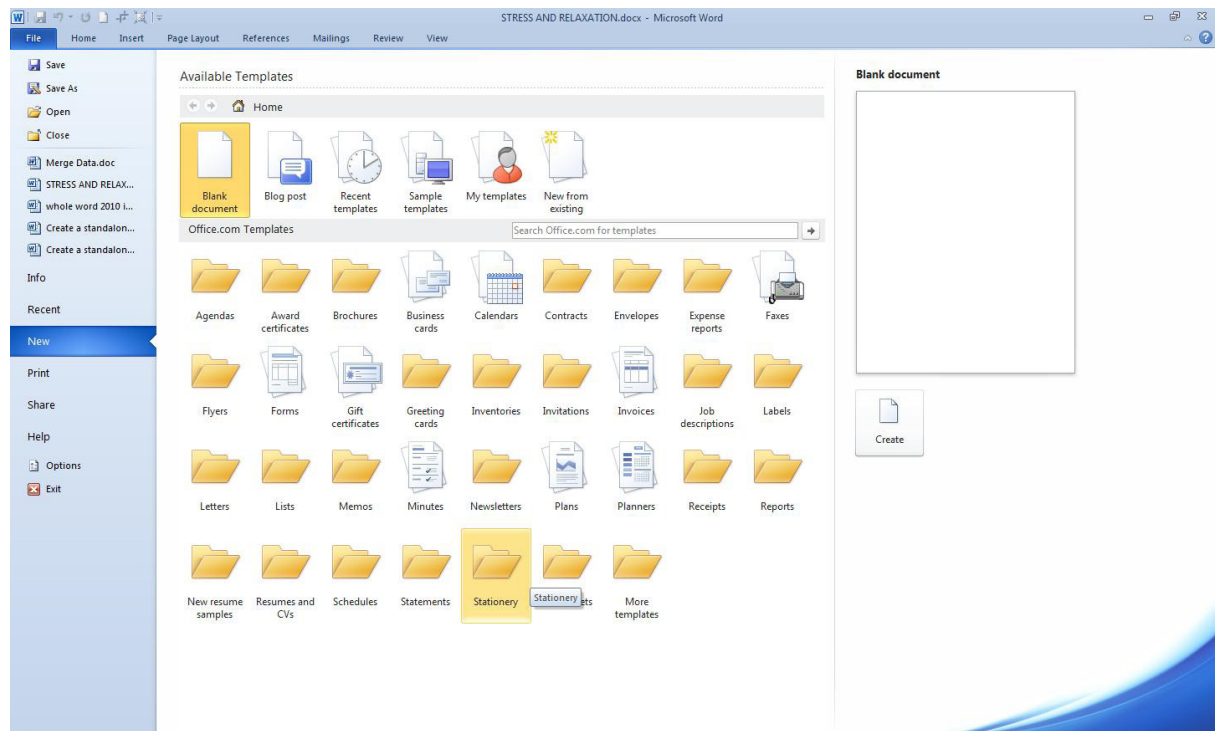
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## Templates

A template is a structure for a particular type of document. You can eliminate much of the work involved in creating new documents if you design templates for the documents you create most often. Templates can include text, styles, formatting, fields, macros, AutoText entries and graphics. The method of accessing templates is a little different in 2010



The new document area is split into 3 main areas

- Local templates created by you or preinstalled ones on your local machine these can be accessed any time they are stored in your user templates folder.
- Office.com templates you may see a thumbnail here if you have previously been online but you must be online to download and use these templates,
- The preview area far right to give you a preview of what your template will look like if you create a document based on this file

### Create A Template

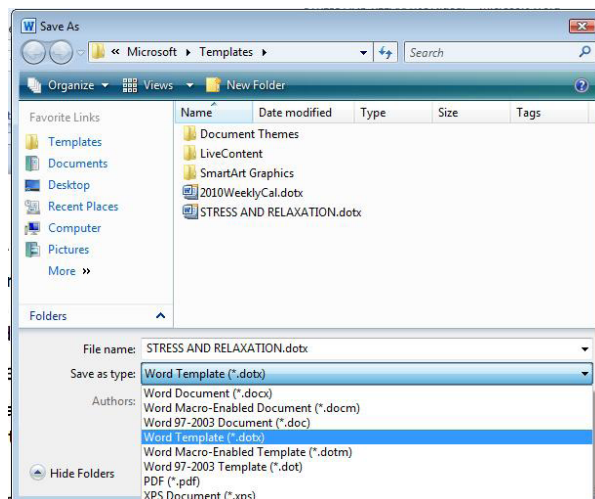
You can create a new template by modifying one of the templates supplied with Word, by saving an existing document in template format or by using the File Tab, New to set up a brand new template file.

#### ► To create a new template:

##### Mouse

1. Click the **FILE** Tab then **NEW**. The **NEW** document window will be to your right.

2. Choose the **BLANK DOCUMENT** icon in the main window click on **CREATE** on the right underneath the preview.
3. A new document will appear on-screen.
4. Click on the **FILE** tab and **SAVE** or **SAVE AS**
5. Give the file an appropriate name.
6. In the **SAVE AS TYPE** box select **DOCUMENT TEMPLATE** (see picture)
7. The file location should be your local user templates folder.



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8. Click on **SAVE** to save the template.

#### OR

1. In the **FILE - NEW** area select **MY TEMPLATES** a dialog will appear.
2. Select a previous template you wish to base your new template on (if there are none then select blank document).
3. Near the bottom right of the dialog choose **TEMPLATE** instead of **DOCUMENT** then click **OK**
4. A new document will appear on screen but it will say **TEMPLATE 1** in the title bar.
5. Save as previously instructed when you have made the changes you wish.
- *A template can be edited like any other file it must be opened like any other file to edit it in any way. **DO NOT** go to the **FILE - NEW** area to edit a template this is only to create new files **based** on a given template. **All template files are saved with a .dotx extension in the C:\Documents and Settings\username\Application Data\Microsoft\Templates. This location may be different if your company has specified a different location for user templates in the OPTIONS dialog. You can change the location in which to store your template, however, you may have difficulties accessing it***

### Template Settings

When designing a template for documents for a specific purpose, you should consider the usual appearance you want for the documents. Options that affect the appearance of a document include the following:

- *Paper size*
- *Page orientation*
- *Margins*
- *Headers and footers*
- *Styles*
- *Themes*

#### ► To set template appearance:

##### Mouse

1. **OPEN** the template file for editing as mentioned previously.
2. Access the **PAGE SET-UP** dialog and set the **MARGINS, ORIENTATION** and **PAPER SIZE** as appropriate.
3. Create any **HEADERS** and **FOOTERS** within the template so that all new documents based on the template will have consistent headers and footers and **SAVE** the file.

### Enhancing A Template

Any text or graphics that you save in the template will appear in every document based on that template. This is a way to create,

- *E.G. a standard letter for your company that includes the company logo and address.*

► To enter boilerplate text and graphics:

Mouse

1. **OPEN** the template file and Type in any standard text and format it to look the way you want.
2. **INSERT** any pictures that should appear in all documents based on the template and **SAVE** the file

### Template From Existing Document

You can also start from a document you already have and save it as a Template, but the save procedure is different from normal. You

1. Select **FILE, SAVE AS**.
  2. In the **SAVE AS** dialog box, you type the file name
  3. click the **SAVE AS FILE** Type drop down option. Choose Document Template from the list and this will add the extension **.DOTX** to the file name. It will also change the destination folder into which the file will be saved. This is the special **TEMPLATES** folder.
- *It is vital you do not try to override this feature because when you select **FILE, NEW** later, Word will look to the Templates folder to present all the available templates to you.*

### Customising The Template Environment

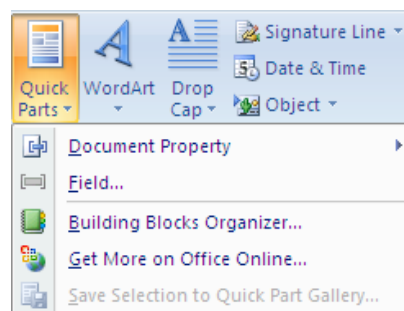
You can attach different features to a specific template.

- *E.G. you can set up field entries and charts that are template specific and you can create macros that are only available to documents based on a particular template.*

### Fields

Fields are special codes that instruct Word to insert information into a document. They can be used to provide document information such as the file name, or the date when it was created. You can also use fields for simple information like page numbering and displaying the current date. Fields are also the underlying component of cross-references, tables of contents and indexes.


### Inserting Fields



► To insert a field into a document:

1. Mouse
2. Position the insertion point where you want to add the field
3. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group.
4. Choose field from the menu a dialog opens.
5. The **FIELD** dialog displays a list of **CATEGORIES**:, and when you click on one of these, the **FIELD NAMES**: in that category are displayed below. At this point you can select the required field (the description tells you what the field will display)
6. Click on the options button on the bottom left of the dialog to access the switches dialog.

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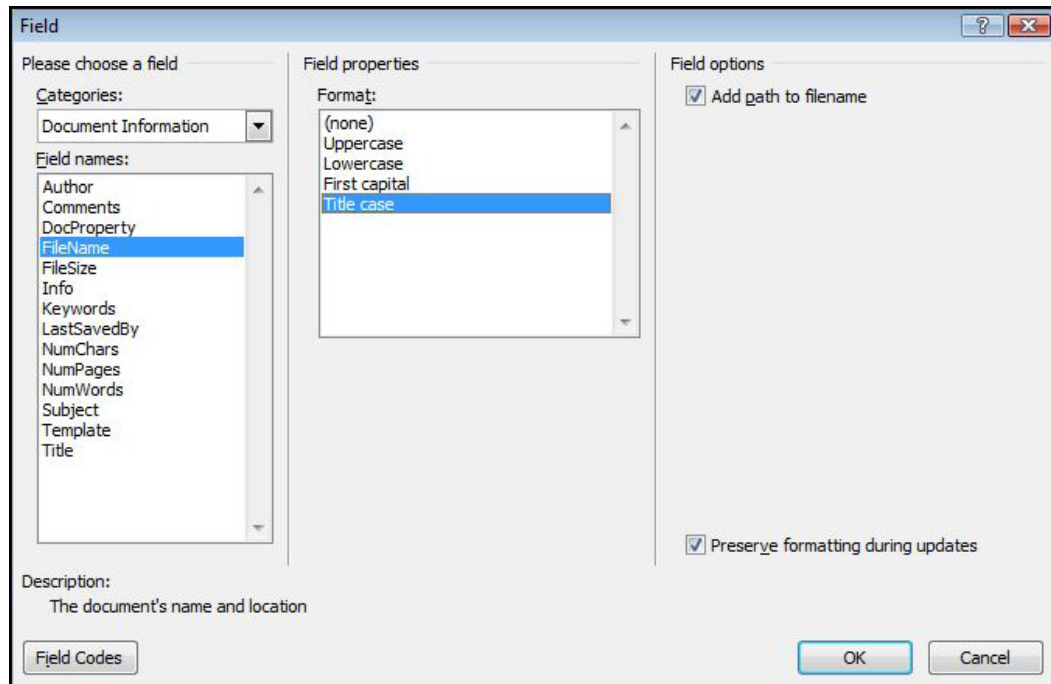
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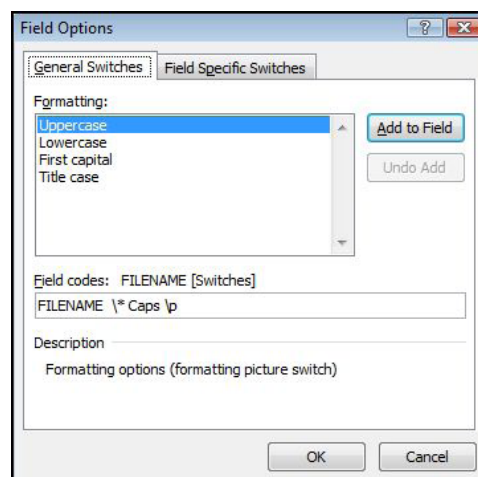
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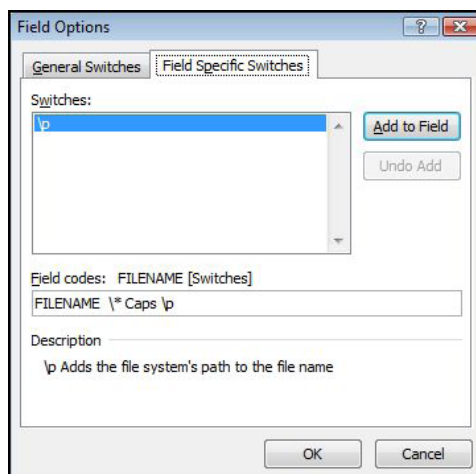
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### Field Switches (Field Properties)

Some fields have further options called “switches”, E.G. the Filename field has an extra switch, which enables you to display the filename with its full path.





► To add a switch:

Mouse

1. There are two tabs in the **FIELD OPTIONS** dialog one tab as shown above for **GENERAL SWITCHES** you can see the options in the first dialog, make a selection.
2. Clicking on the **FIELD SPECIFIC SWITCHES** tab (if available) will allow some alternatives to add to your field very specific to the field you are using. Make a selection and click **OK** to apply those switches to your field
3. Click on **OK** on the main **FIELD** dialog to insert your field with all its switches

### Inserting The Styleref Field

There are various reference fields, which are largely irrelevant, since there is a separate cross-referencing feature in word. However one field, which is useful, is {StyleRef}. It is often used to place the current Chapter Title in the Header or Footer area. {StyleRef} - inserts the text of the next or most recent paragraph using the specified style. This training manual displays the Heading 1 text in the Header. The text changes only when a new Heading 1 paragraph is on the current page. If there isn't one, it continues to use the last Heading 1 text.

► To insert the StyleRef field:

Mouse

1. Choose **QUICK PARTS** from the **INSERT** ribbon in the **TEXT** group. Click on **FIELD** A dialog opens.
2. Select the **LINKS AND REFERENCES** category, then select **STYLEREF**
3. Specify the style name you wish to use from the field properties and click on **OK**  
{STYLEREF "Heading 1"}
4. Right click on the field and then choose **EDIT FIELD** the dialog opens link the field to another style, E.G.:  
{STYLEREF "Heading 2"}

5. Then press **F9** to update the field.

## Updating Fields

Most fields do not update automatically. In these cases you would need to update the fields.

- *E.G. if you enter the **DATE FIELD** (displays the current date), every time you open the document in future, the old date is still displayed. Or, if you have entered the Filename field in a document, and subsequently change the name of the file, the document will still display the old filename.*

### ► To update a field:

#### Mouse

1. Right click on a field and choose **UPDATE FIELD**.

#### Keyboard

1. Click in or select the field and Press **F9**

Alternatively, you can make Word automatically update all the fields when you print the document.

### ► To set automatic field updating when printing:

#### Mouse

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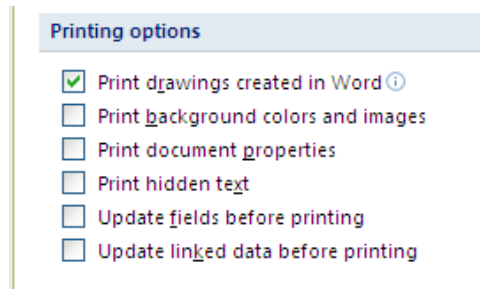
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1. Click the **FILE TAB** and select **ADVANCED**
2. Scroll down on the right to the printing options
3. Select the **UPDATE FIELDS BEFORE PRINTING** check box

### Viewing Field Codes

When you have inserted a field, the results will be displayed in your document.

- *E.G. a field code to display the path and name of the current document might show up like this:*  
**C:\MY DOCUMENTS\WORD2002 ADVANCED MANUAL.DOC**

You may need to see the underlying code.

### Display All Field Codes

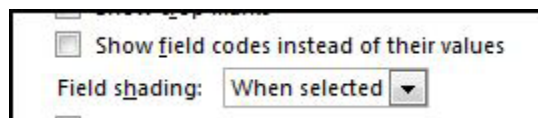
► To display all the field codes in the document:

#### Keyboard

1. Press **ALT F9**

#### OR

1. Click the **FILE TAB** and select **OPTIONS**.
2. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**.
3. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.



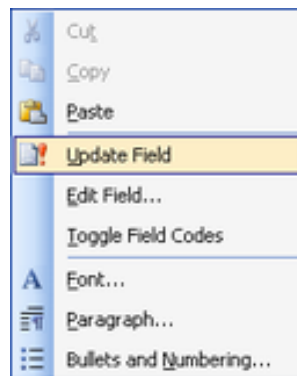
4. You also have the option how those field codes are displayed just underneath that option you may select from the drop down box whether to show the fields shaded or not so as to easily identify them.

*Whatever choices you make these are selections for the screen only the fields will print the actual vales as described. Print preview will show exactly how the data will appear. To toggle back to display all field results, repeat the procedure above.*

#### Display A Single Field Code

- To display the underlying field code:

##### Mouse



1. Click the right mouse button when pointing at the field from the shortcut menu click on **TOGGLE FIELD CODES**

##### Or

##### Keyboard

1. Click in or select the resulting the text, and press **SHIFT F9**

The field code is always displayed inside a set of brackets. The name of the field is displayed along with any switches.

**{FILENAME \p \\* MERGEFORMAT}**

*Pressing SHIFT F9 (or using the menu) is a toggle, in other words every time you press it, and Word either displays the field result or the field code.*

#### Locking A Field

It is possible to lock a field so that the results displayed cannot be updated by either pressing **F9**, or by using the turning off the **UPDATE FIELDS BEFORE PRINTING** option in the **PRINTING** Options.

► To lock/unlock a field:

Keyboard

1. To lock - Click in or select the field. Press **CTRL F11**.
2. To unlock - Click in or select the field Press **CTRL SHIFT F11**

### Unlinking Fields

You can also unlink a field. The field result is converted into literal text, which means it is no longer, a field and so cannot be updated.

► To unlink a field:

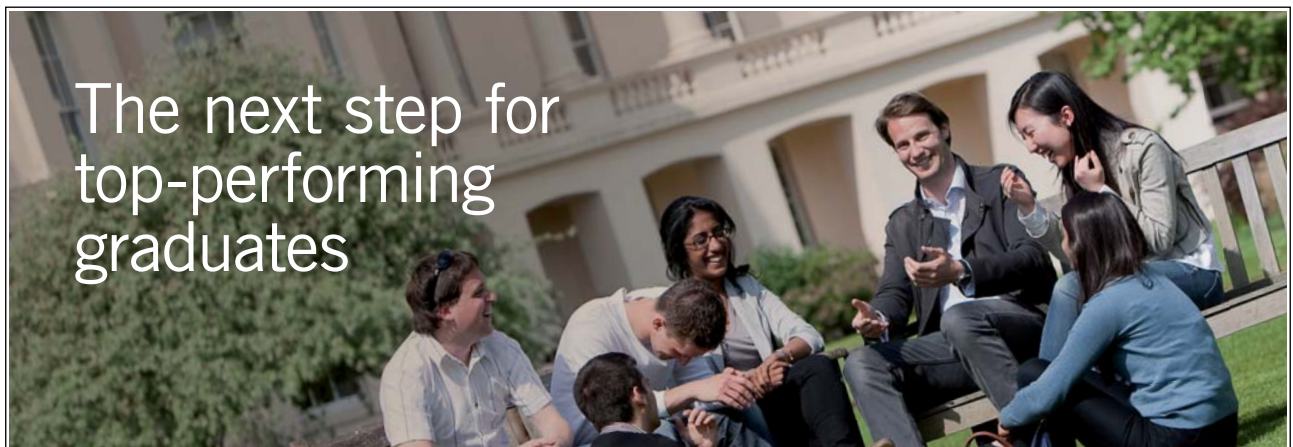
Keyboard

1. Click in or select the field Press **CTRL SHIFT F9**

### Deleting Fields

If you have entered a field which you no longer want to keep, you must select the whole field before pressing **DELETE** or **BACKSPACE**.

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\* Figures taken from London Business School's Masters in Management 2010 employment report

## Common Long Document Fields

There are many different types of fields, some of which are used for specific tasks. The following fields are some of the more common used in Long Documents. Whilst these fields can be placed anywhere in a document, they are often displayed in the Header and Footer area.

### Date And Time

Field Name	Description
Date	The current date
Time	The current time
Create Date	The date when the document was created
Print Date	The date when the document was last printed
Save Date	The date when the document was last saved

When you insert these fields, you can click on the **OPTIONS** button in the Field dialog to change the formatting of the dates and times.

### Document Information

Field Name	Description
Title	The Title from the Summary Information
Subject	The Subject from the Summary Information
Author	The Author from the Summary Information
LastSavedBy	The name of the person who last saved the file
Filename	The name of the document, with an option to display the full path
Template	The name of the document's template, and an option to display the path
NumPages	The total number of pages in the document

### Numbering

Field Name	Description
Page	The current page number
Section	The current section number
Section Pages	The total number of pages in the current section
RevNum	The number of times the document has been saved

*The Page and The Section fields can be combined to produce composite page numbers. E.G. the second page in the fifth section could be displayed like this: 5-2.*

## Using Fields In A Template

Word fields may also be part of a template. There are nine categories of Word fields and they provide the means to insert information or perform an action automatically.

- *E.G. the Date field inserts the computer system's current date in a document. Other Word fields can insert page or section numbers, enter the author's name, or insert correct page references to another page in the document.*

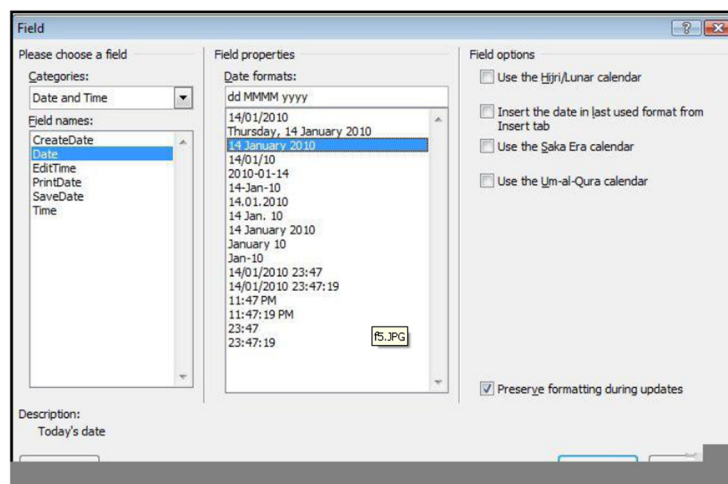
When you insert the date or time, you can check Update Automatically. When this is checked, Word will automatically update the field to the current date or time when the document is printed. If you want the current date to be inserted in the document and to remain as that date, do not check Update Automatically.

In order to view the field inserted in a document or template, you must check the **SHOW FIELD SHADING WHEN SELECTED OPTION** in the **ADVANCED** tab, **DISPLAY** section of the **WORD OPTIONS** dialog box accessed from the **FILE TAB**.

### ► To insert a date field in a template:

#### Mouse

1. **OPEN** the template file
2. Position the insertion point where you want the date to appear.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**.



4. Insert the **DATE** field from the **FIELD** dialog
5. Choose the format you would like for your date by clicking on the appropriate date in the list of field properties .
6. Click **OK**. The date will appear in the template.

## The Fillin Field

The Fillin field allows you to pop-up a custom dialog box that prompts the user of the document to enter text. You enter the message that you want displayed in the dialog box. E.G. you might use a Fillin field in a memo template to prompt the author for the memo subject.

### ► To insert fields to provide user prompts:

#### Mouse

1. Open the template file.
2. Position the cursor where you want the variable information.
3. Go to the **QUICKPARTS** button on the **INSERT** ribbon and select **FIELD**. The field dialog box will appear.
4. In the **CATEGORIES** list choose **MAIL MERGE**.
5. In the **FIELD NAMES** list choose **FILL-IN**. Click in the **FIELD PROPERTIES** text box and type your prompt, such as Please enter the memo subject.
6. If you expect many entries the same such as “country of origin” “UK” then enter a default response in the **FIELD OPTIONS** text box for a default response.

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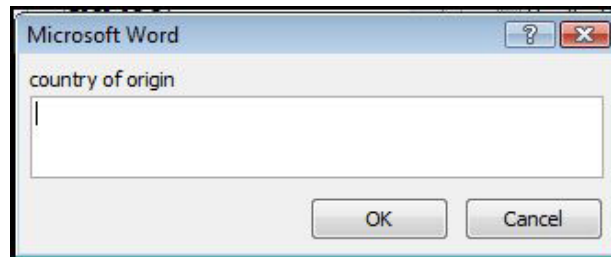
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7. Click **OK**. The following dialog box will flash up on the screen.
8. This is a preview of how your prompt boxes will appear to those people using your template.
9. Click the **CANCEL** button to clear the dialog.
10. Repeat the process until you have created dialogs to cover all the variable information you need to prompt for.
11. Save the template file.

*You won't see the underlying FILLIN field codes unless you switch on the field codes on the ADVANCED page SHOW DOCUMENT CONTENT section of the OPTIONS dialog. It is useful to see these as you are working on the template, but remember to switch them off before you save the file or anyone using the template might get confused!*

### Using A Template With Fillin Fields

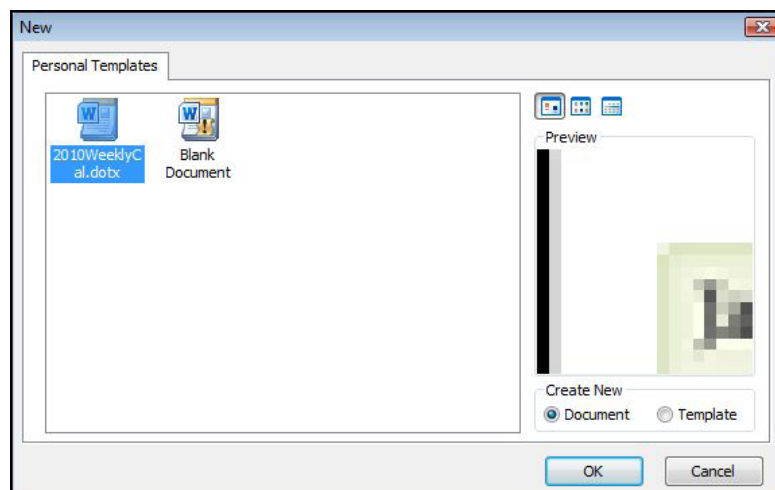
The dialog boxes will appear whenever a new document based on the template is created.

#### ► To create a new document based on the template:

##### Mouse

1. Click the **FILE TAB** then **NEW**.
2. Choose **MY TEMPLATES** The **MY TEMPLATE** dialog will appear
3. The templates should be listed on the **MY TEMPLATES** page of the dialog in icon format. Select the type of document you want to create with the Fillin fields and ensure that the document option in the "create new" section is selected then click on **OK** or double click the icon.





4. The new document will appear with any boilerplate text, headers and footers and dialogs that you set up in the template.
5. Enter information in the various Fillin field dialogs this will enter the information in the appropriate locations in the document when complete save and print it in the usual way.

*Whenever you click in a field code or result, the whole field is displayed with a grey shaded background. However you can use the Field shading Options dialog to specify that all fields, even if they are not selected, should be displayed with a grey background. This can help you to quickly identify text which has been generated by a field.*

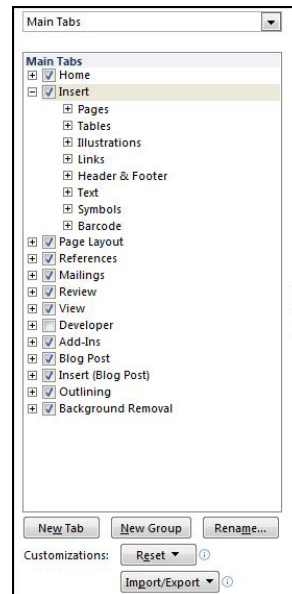
► To alter field shading options:

Mouse

1. Click the **FILE TAB** and select **WORD OPTIONS**. Click on the **ADVANCED** tab and scroll on the right to **SHOW DOCUMENT CONTENT**. Click on the **SHOW FIELD CODES INSTEAD OF THEIR VALUES** check-box.
2. Use the **FIELD SHADING** drop down list to pick the type of shading you want:
  - Choose **NEVER** to display no shading
  - Choose **ALWAYS** to display shading on all fields
  - **WHEN SELECTED** is the default

## Form fields

Starting with a template, you can add content controls and instructional text in Microsoft Office Word 2010 to quickly and easily create a form that you can send to others to fill out using Office Word 2010 on their computer. In an advanced scenario, any content controls that you add to a form can also be linked to data.



You can also create a form by starting with a sample template. Many are available on the Microsoft Office Online Web site.

*You can print a form that was created by using content controls in Office Word 2010, but the boxes around the content controls will not be printed.*

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## Create A Form

Word is not immediately ready to start creating forms as the more advanced tools have been hidden. To rectify this we must make them available.

### ► To Set up Word for creating forms

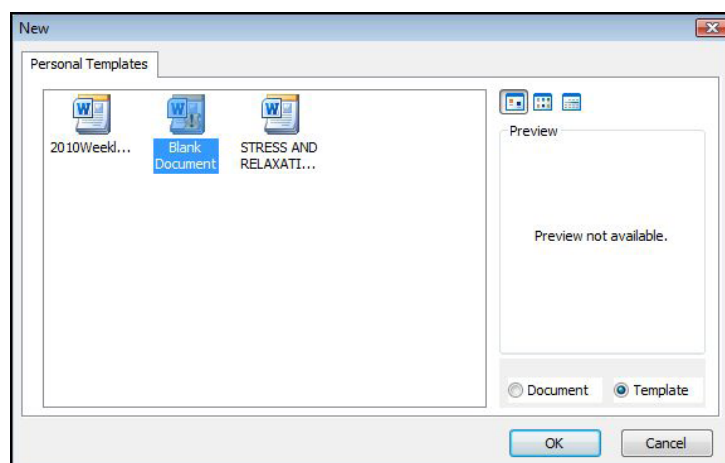
#### Mouse

1. Click the **FILE TAB** , and then click **OPTIONS**.
2. Click **CUSTOMISE RIBBON** on the left.
3. On the right Select **DEVELOPER TAB** check box, and then click **OK**.

### ► To create a template or a document on which to base the form

#### Mouse

1. Click the **FILE TAB** , and then click **NEW**.
2. Under available **TEMPLATES**, click **MY TEMPLATES**.



3. Click **BLANK DOCUMENT**, and then select **TEMPLATE** or **DOCUMENT** on the bottom right.
4. Click **OK**
5. Click the **FILE TAB** , and then click **SAVE AS**.
6. In the **SAVE AS** dialog box, give the new template or document a file name, and then click **SAVE**.

## Controls

Content control	Definition	Example	Restrictions
Rich Text	Formatting can be saved by loading, saving, or closing the document.	Use for a short paragraph such as an abstract, a summary, or a legal disclaimer.	No restrictions.
Text	Limited to content that cannot contain any formatting, only plain text.	Use for a simple paragraph.	Limits the formatting to the formatting that is applied around the content control. You can change the formatting by making changes to the surrounding formatting.
Picture	Fills the content control with a single picture.	Use for a drawing, a shape, a chart, a table, a clip art object, or SmartArt.	Limits formatting changes to picture brightness and contrast. Also prohibits users from inserting any other Word objects or any text.
Combo Box	Contains a list that you can edit directly. Formatting can be saved by saving or closing the document.		Like plain text, limits text to a single paragraph that cannot contain any formatting.
Drop-Down List	Contains a list of restricted choices defined by the template author when the user activates the drop-down box.	Use this to provide a set of choices, such as a list of names or a set of formatted design elements (such as cover pages or header or footers).	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Date Picker	Contains a calendar control. Limits text to a single paragraph.	Use this to help users enter a date.	Like plain text, limits text to a single paragraph that cannot contain any formatting.
Building Block Gallery	Shows a gallery of formatted design choices that you can add to the content control.	Use this to specify a set of cover pages, headers and footers, page designs, or other building blocks that you add to the Quick Parts gallery.	No restrictions.

➤ To Add content controls to the form  
Mouse and keyboard



1. Design the form by sketching a layout first (on paper), or use an existing form as a guide.
2. In your form, you can add content controls, tables, and other graphics elements.
3. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**, and then click where you want to insert a control.
4. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **RICH TEXT** control or the **TEXT** control .



- *Inserts a basic text field where users can enter text*
5. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click the **DROP-DOWN LIST** control.

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- Inserts a drop-down list that restricts available choices to those you specify
6. Select the content control, and then on the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
  7. To create a list of choices, under **DROP-DOWN LIST PROPERTIES**, click **ADD**.
  8. Type a choice in the **DISPLAY NAME** box, such as **YES**, **NO**, or **MAYBE**.
  9. Repeat this step until all of the choices are in the drop-down list then click **OK**.

► To set or change properties for content controls

Each content control has properties that you can set or change. E.G., the Date Picker control offers options for the format you want to use to display the date.

Mouse

1. Ensure you are in **DESIGN MODE**
2. Right-click the content control that you want to change.
3. Click **PROPERTIES**, and change the properties that you want.

► To add instructional text to the form

Instructional text can enhance the usability of the form you create and distribute. You can change the default instructional text in content controls. To customise the default instructional text for your form users, do the following:

Mouse

1. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE**.
2. Click the content control where you want to revise the placeholder instructional text.
3. Edit the placeholder text and format it any way you want.
4. If you want the content control to disappear when someone types in their own content to replace your instructions in a **RICH TEXT** control or a **TEXT** control, click **PROPERTIES** in the **CONTROLS** group, and then select the **REMOVE CONTENT CONTROL WHEN CONTENTS ARE EDITED** check box.
5. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **DESIGN MODE** to turn off the design feature and save the instructional text.
  - *Do not select the **CONTENTS CANNOT BE EDITED** check box if you want form users to replace the instructional text with their own text.*

### Add Protection To The Form

You can protect individual content controls in a template to help prevent someone from deleting or editing a particular content control or group of controls, or you can help protect all of the template content with a password.

- *If you want, you can test the form prior to distributing it. Open the form, fill it out as the user would, and then save a copy in a location that you want.*

► To Protect fields in a form

Mouse

1. Open the form that you want to protect.
2. Select the content control or the group of controls to which you want to restrict changes.
3. To group several controls, select the controls by pressing **SHIFT** and clicking each control that you want to group. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **GROUP**, and then click **GROUP**.
4. On the **DEVELOPER** ribbon, in the **CONTROLS** group, click **PROPERTIES**.
5. In the **CONTENT CONTROL PROPERTIES** dialog box, under **LOCKING**, do either of the following:
6. Select the **CONTENT CONTROL CANNOT BE DELETED** check box, which allows the content of the control to be edited but the control itself cannot be deleted from the template or a document that is based on the template.

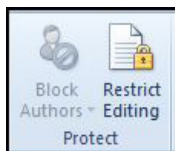


7. Select the **CONTENTS CANNOT BE EDITED** check box, which allows you to delete the control but does not allow you to edit the content in the control.

*This option is not available for all controls.*

➤ To Protect all of the contents of a form

Mouse



1. Open the form that you want to help protect.
2. On the **DEVELOPER** ribbon, in the **PROTECT** group, click **RESTRICT EDITING**, a task pane opens.

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3. In the **RESTRICT FORMATTING AND EDITING** task pane, under **EDITING RESTRICTIONS**, select the **ALLOW ONLY THIS TYPE OF EDITING IN THE DOCUMENT** check box.
4. In the list of editing restrictions, select **FILLING IN FORMS**.
5. Under **START ENFORCEMENT**, click **YES, START ENFORCING PROTECTION**.
6. To assign a password to the document so that only reviewers who know the password can remove the protection, type a password in the **ENTER NEW PASSWORD (OPTIONAL)** box, and then confirm the password.

#### ► To Protect A Section Of The form

Rather than protect the whole of a form, you may want to allow users to freely type into certain areas.

#### Mouse

1. Position the insertion point where you wish protection to stop.
2. Select **BREAKS** from the **PAGE SETUP** group on the **PAGE LAYOUT** ribbon.
3. Click on the **CONTINUOUS** break.
4. **RESTRICT EDITING** from the **REVIEW** or **DEVELOPER** ribbon



5. Click on the **FILLING IN FORMS** from the drop down box then click on **SECTIONS** a dialog opens.
6. Remove the protection from Section 2 and click on the **YES START PROTECTION**.
7. Type a password if you desire. Confirm the password and note that the top section is now protected. Now save the template.

*Open a new document based on this and note that while you can only access the fields in the protected section you are able to type below the section break.*

*If you choose not to use a password, anyone can change your editing restrictions. Use strong passwords that combine uppercase and lowercase letters, numbers, and symbols. Weak passwords don't mix these elements. Strong password: Y6dh!et5. Weak password: House27. Passwords should be 8 or more characters in length. A pass phrase that uses 14 or more characters is better.*

*It is critical that you remember your password. If you forget your password, Microsoft cannot retrieve it. Store the passwords that you write down in a secure place away from the information that they help protect.*

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