WORD FOR WINDOWS



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Preface

Introduction

Word for Windows is an Open Educational Resource (OER) textbook developed to support students at **Lemoore College** and other community colleges studying Business, Business Information Systems, Office Technology, and related fields.

This textbook is designed as the **primary instructional resource** for introductory and intermediate Microsoft Word courses, including **BUS 13A: Word for Windows I** and **BUS 13B: Word for Windows II**. It provides students with essential computer application skills that support academic success, professional development, and career readiness.

Why Microsoft Word Matters

Microsoft Word is one of the most widely used word-processing applications in education, business, and professional workplaces. This textbook connects technical skills with real-world applications, helping students develop the ability to create, edit, format, organize, and manage professional documents.

Students will explore fundamental and advanced features of Microsoft Word, including document formatting, page layout, tables, graphics, collaboration tools, document review, and professional document design.

These skills are applicable across various industries, including business administration, education, healthcare, agriculture, government, and office management.

Who This Textbook Is For

This textbook assumes **no prior experience with Microsoft Word** and is designed to support students with varying levels of computer proficiency.

Beginning with foundational concepts, students will gradually develop the skills and confidence needed to complete more advanced word-processing tasks.

The material bridges the gap between basic computer literacy and the practical technology skills expected in college courses and professional workplaces.

Students completing these courses will be better prepared for additional coursework in business technology, office administration, and related academic and career pathways.

Student Learning Outcomes

Upon successful completion of the course, students should be able to:

- **Understand** the fundamental and advanced features of Microsoft Word and their applications in academic and professional settings.
- **Create**, edit, save, organize, and manage documents using Microsoft Word.
- **Apply** formatting techniques, page layouts, styles, tables, and graphics to produce professional-quality documents.
- **Use** reviewing, editing, and collaboration tools to improve document accuracy, consistency, and communication.
- **Demonstrate** problem-solving, digital literacy, and technical skills through practical word-processing activities.
- **Develop** professional documents such as business letters, reports, resumes, newsletters, and other workplace materials.
- **Apply** Microsoft Word skills to future academic goals, professional responsibilities, and career opportunities.

Our Approach to Learning

To support student success, each chapter begins with **clear learning objectives** and incorporates step-by-step instructions, practical examples, guided exercises, and hands-on activities.

Students are encouraged to review the learning objectives before beginning each chapter and revisit them as they complete assignments and practice activities.

The textbook emphasizes **learning by doing**, allowing students to build confidence through real-world document creation and problem-solving.

Interactive learning opportunities, skill checks, and applied assignments help students evaluate their progress and strengthen their understanding of Microsoft Word.

Accessibility, Equity, and Inclusion

This OER textbook draws inspiration from existing open educational materials in computer applications, workplace technology, and digital literacy.

It is part of a growing effort to make higher education **affordable, accessible, inclusive, and relevant** to diverse community college learners, including first-generation college students, working adults, returning students, multilingual learners, and individuals with varying levels of technological experience.

Throughout the textbook, students are encouraged to develop digital skills at their own pace while recognizing that access to technology, prior computer experience, language, and educational opportunities may differ.

The instructional approach emphasizes **equitable access, practical application, and student-centered learning**, ensuring that students from different backgrounds can develop the technological skills necessary to succeed in today's digital environment.

Our Commitment to Open Education

By making this resource openly available, we aim to reduce financial barriers associated with traditional textbooks while supporting instructors and students in adapting, expanding, and improving the material to meet their educational needs.

This resource also promotes lifelong learning by providing students with skills that extend beyond the classroom and into their personal, academic, and professional lives.

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Word for Windows

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BUS 13A: Word for Windows I
BUS 13B: Word for Windows II

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Word for Windows

Ivan Huerta
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This text was compiled on 11/12/2026

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Detailed Licensing

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1: CHAPTER 1- GETTING STARTED WITH WORD

1.1: Navigating Microsoft Word
1.2: Exploring the Word Window
1.3: Entering and Editing Text
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1.1: Navigating Microsoft Word

Learning Objectives

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

- Identify the most commonly used tabs in Microsoft Word.
- Explain the functions of important Word commands.
- Use the Navigation pane to locate and organize information.

Introduction to Microsoft Word

Microsoft Word is a word-processing application used to create, edit, format, and share documents. It provides tools for adjusting fonts and page layouts, inserting graphics, reviewing changes, collaborating with others, checking spelling, and searching for information.

In this section, you will explore the main tabs in Microsoft Word and learn how to navigate documents efficiently.

Practice: Creating a Market Trends Report

To practice using Microsoft Word, open a new blank document and enter the following sample text:

> **Industry and Market Analysis**
>
> The laptop industry includes several major companies, including HP, Dell, Apple, Acer, and Lenovo. Consumers can purchase laptops at different price points depending on their needs for performance, storage, and features. Laptops also compete with tablets and convertible devices that combine features of both types of technology.

You will use this sample document to practice formatting, navigation, and other Microsoft Word features.

Understanding Microsoft Word Tabs

Microsoft Word organizes commands into tabs located along the Ribbon at the top of the application window.

Common tabs include **File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View,** and **Help**. Available tabs may vary depending on the Word version and settings.

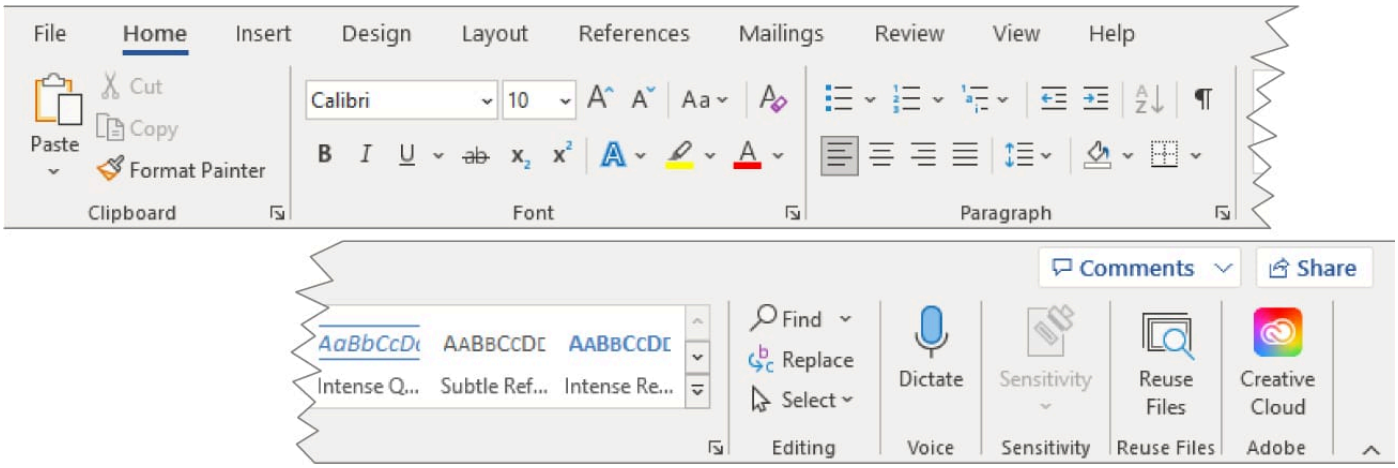


Figure 1. Microsoft Word Ribbon and Common Tabs. Used with permission from Microsoft.

Mac Tip

Microsoft Word for Mac includes many of the same Ribbon tabs as Word for Windows. However, some commands and settings may appear in different locations. Mac users can also access application settings through the Word menu.

Home Tab

The **Home tab** contains commonly used tools for formatting and editing text.

These tools include:

- Changing font type, size, and color.
- Applying bold, italic, and underline formatting.
- Adjusting paragraph alignment and spacing.
- Creating bulleted and numbered lists.
- Applying heading styles.
- Finding and replacing text.

Insert Tab

The **Insert tab** allows users to add elements to a document.

Common features include:

- Tables and pictures.
- Charts and shapes.
- Headers and footers.
- Page numbers.
- Text boxes and symbols.
- Links and bookmarks.

For example, when preparing a business report, you might insert a chart to illustrate sales information or add page numbers to organize a lengthy document.

Layout Tab

The **Layout tab** provides tools for controlling how information appears on a page.

Common features include:

- Changing page margins.
- Selecting paper size and orientation.
- Creating columns.
- Adjusting paragraph indentation and spacing.
- Managing page and section breaks.

These features help users create documents that are organized, readable, and professional.

Review Tab

The **Review tab** contains tools for proofreading, editing, and collaborating with others.

Important features include:

- **Spelling and Grammar:** Helps identify possible writing errors.
- **Comments:** Allows users to provide feedback without directly changing the original text.
- **Track Changes:** Records edits made to a document.
- **Word Count:** Displays information about the number of words in a document.
- **Compare:** Helps identify differences between document versions.

For example, when several employees are preparing a business report, they can use Comments and Track Changes to review suggestions and revisions.

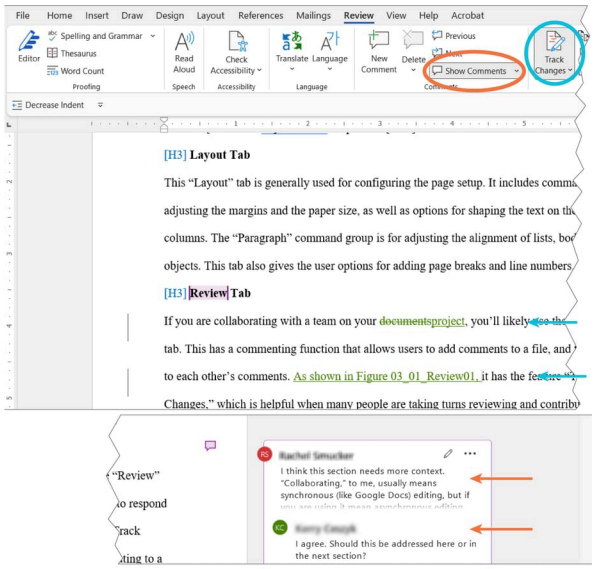


Figure 2. Reviewing Documents Using Comments and Track Changes. Used with permission from Microsoft.

Track Changes is similar to marking corrections on a printed document. Instead of writing comments with a pen, users can review and respond to edits electronically.

View Tab

The **View tab** allows users to change how a document appears on the screen.

Common features include:

- Switching between document viewing modes.
- Adjusting zoom levels.
- Displaying rulers and gridlines.
- Viewing multiple pages.
- Opening the Navigation pane.

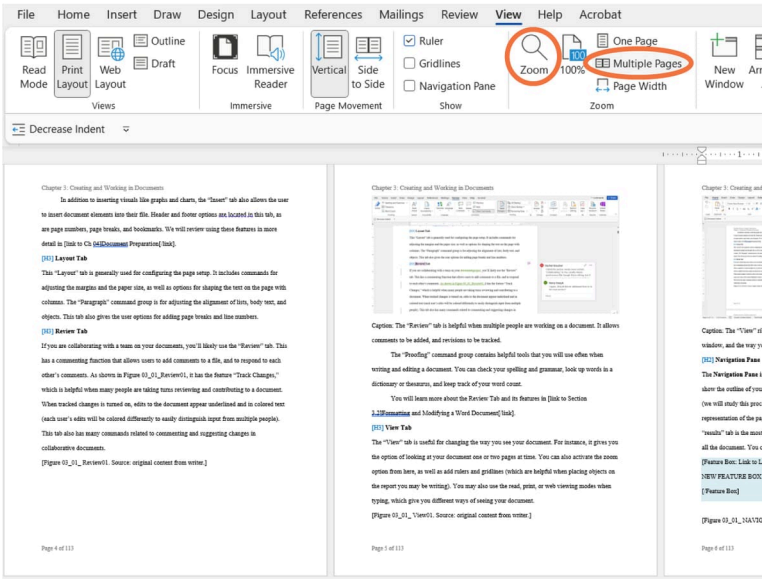


Figure 3. Viewing Multiple Pages in Microsoft Word. Used with permission from Microsoft.

Using the Navigation Pane

The **Navigation pane** helps users locate information and move quickly through a Microsoft Word document.

To open the Navigation pane:

1. Open a document in Microsoft Word.
2. Select the **View** tab.
3. Locate the **Show** group.
4. Select **Navigation Pane**.

You can also open the Navigation pane by selecting **Find** on the Home tab or pressing **Ctrl + F**.

Navigation Pane Features

The Navigation pane provides several ways to locate information:

- **Headings:** Displays an outline of the document based on headings created with Word's heading styles.
- **Pages:** Displays page thumbnails for navigating through the document.
- **Results:** Displays matches when searching for words or phrases.

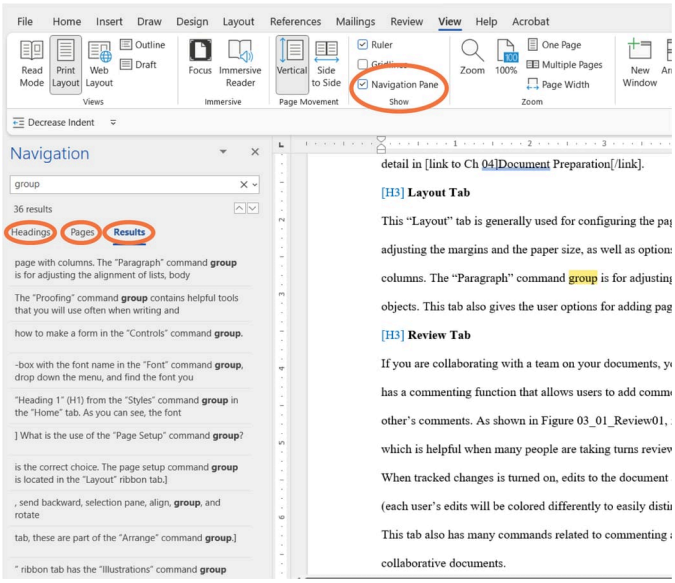


Figure 4. Using the Navigation Pane to Search and Navigate Documents. Used with permission from Microsoft.

Mac Tip

Mac users can open the Find feature by pressing **Command + F**.

Real-World Application

What Is a Document?

A document is a file that contains information, such as text, images, or other content. Microsoft Word documents are commonly used to create letters, reports, resumes, and other professional materials.

Word provides formatting tools that allow users to organize and present information clearly.

Sometimes, users may not have access to Microsoft Word. Basic text editors, such as Notepad, can be used to create simple text files (.txt). However, these programs generally provide fewer formatting options than Microsoft Word.

For example, you might use Notepad to record meeting notes and later transfer the text into Microsoft Word to create a formatted business document.

Key Takeaways

- Microsoft Word organizes commands into Ribbon tabs.
- The Home tab contains frequently used formatting tools.
- The Insert tab adds objects and other content to documents.
- The Layout tab controls page formatting.
- The Review tab supports proofreading and collaboration.
- The View tab controls how documents appear on the screen.
- The Navigation pane helps users locate information and move through documents.

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1.2: Exploring the Word Window

Exploring the Microsoft Word Window

Microsoft Word includes several tools that help you create, edit, format, and manage documents. Understanding the different parts of the Word window will help you navigate the program and complete tasks more efficiently.

Review the illustration below to become familiar with the main features of the Microsoft Word window.

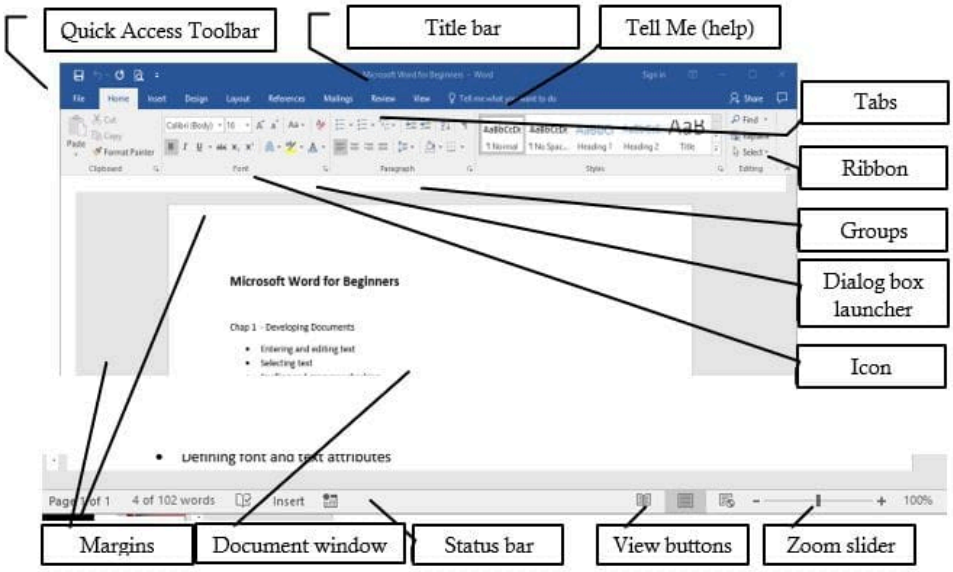


Figure 1. Main Components of the Microsoft Word Window.

Main Components of the Microsoft Word Window

The following features help users navigate Microsoft Word and access frequently used commands.

- **Quick Access Toolbar:** Provides convenient access to frequently used commands, such as Save, Undo, and Redo. Depending on your version of Word, you may be able to customize this toolbar to include additional commands.
- **Title Bar:** Displays the name of the current document and the application. A new document may initially be named Document1 until you save it with a different name. Window controls, such as Minimize, Maximize or Restore, and Close, are also located in the title bar area.
- **Tell Me or Search Feature:** Helps users locate commands and tools within Microsoft Word. In some versions, this feature is called Tell Me, while newer versions may display a Search box. Users can type keywords, such as "Insert Picture," to find related commands.
- **Ribbon:** Contains the main commands used to create and format documents. The Ribbon is organized into tabs, such as Home, Insert, Layout, and Review. Each tab contains groups of related commands.
- **Dialog Box Launcher:** A small arrow that appears in the corner of certain Ribbon groups. Selecting it opens additional settings or formatting options.
- **Contextual Tabs:** Special tabs that appear when certain objects, such as pictures or tables, are selected. These tabs provide additional tools for working with the selected object.

Key Takeaways

- The Quick Access Toolbar provides access to commonly used commands.
- The Title Bar displays the document name and window controls.

- The Tell Me or Search feature helps users locate Word commands.
- The Ribbon organizes commands into tabs and groups.
- Dialog Box Launchers provide additional formatting options.
- Contextual Tabs appear when working with certain document objects.

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1.3: Entering and Editing Text

Entering and Editing Text in Microsoft Word

Microsoft Word is a word-processing application used to create, edit, format, and share documents. When opening Word, users can start with a blank document or choose a pre-designed template.

To enter text, click inside the document where you want to begin typing. The blinking **insertion point** shows where your text will appear.

As you type, Microsoft Word automatically moves text to the next line when it reaches the right margin. This feature is called **word wrap**. You do not need to press Enter at the end of every line. Press **Enter** when you want to begin a new paragraph.

Understanding Line Spacing

Line spacing refers to the vertical distance between lines of text within a paragraph.

Microsoft Word provides several line-spacing options, including single, 1.15, 1.5, double, and multiple spacing. The default setting may vary depending on the Word version and document style.

How to Adjust Line Spacing

1. Select the text or paragraph you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select the **Line and Paragraph Spacing** button.
5. Choose the desired spacing option.



Figure 1. Line and Paragraph Spacing in Microsoft Word.

Understanding Paragraph Spacing

Paragraph spacing controls the amount of space before or after a paragraph. Unlike line spacing, which affects the lines within a paragraph, paragraph spacing affects the separation between paragraphs.

Using paragraph spacing helps organize information and makes documents easier to read.

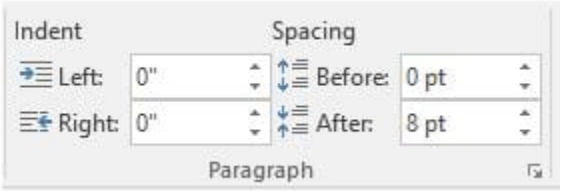


Figure 2. Paragraph Spacing in Microsoft Word.

How to Adjust Paragraph Spacing

1. Select the paragraph you want to format.
2. Click the **Layout** tab.
3. Locate the **Spacing** settings in the Paragraph group.
4. Adjust the **Before** or **After** values using the arrows or by entering a number.
5. Review the document to ensure the spacing is appropriate.

Paragraph spacing is typically measured in **points (pt)**. For example, setting the After spacing to 8 pt adds space after the paragraph.

Comparing Line Spacing and Paragraph Spacing

The following table explains the differences between line spacing and paragraph spacing in Microsoft Word.

Table 1. Comparison of Line Spacing and Paragraph Spacing

Feature	Line Spacing	Paragraph Spacing
Purpose	Controls the distance between lines within a paragraph.	Controls the space before or after a paragraph.
Common Settings	Single, 1.15, 1.5, and double spacing.	Before and After spacing, usually measured in points.
Where to Find It	Home tab, Paragraph group.	Layout tab, Paragraph group.
Example	Using double spacing for a school assignment.	Adding 8 pt of space after each paragraph.
Why It Matters	Improves readability within paragraphs.	Creates visual separation between paragraphs.

Automatic Features in Microsoft Word

Microsoft Word includes automatic features that can help users work more efficiently while entering and editing text.

These features may include automatic spelling corrections, capitalization adjustments, and other typing assistance tools. Available features depend on the version of Microsoft Word and the user's settings.

The following table describes common automatic typing and editing features in Microsoft Word and explains how to use them.

Table 2. Automatic Typing Features in Microsoft Word

Feature	How to Use
AutoComplete	A ScreenTip appears as you type. Press Enter to insert the suggested text, or continue typing to reject the suggestion.
AutoCorrect	Commonly misspelled words and capitalization mistakes are automatically corrected based on Word's dictionary.
Word Count	Word continually recalculates the total word count displayed in the status bar.
Spelling and Grammar	Right-click text marked with a red or other colored underline to display suggested corrections. Select an appropriate suggestion to correct the text.

Key Takeaways

- **Microsoft Word** allows users to create, edit, format, and share documents.
- **Word wrap** automatically moves text to the next line.
- **Line spacing** controls the distance between lines within a paragraph.
- **Paragraph spacing** controls the space before and after paragraphs.

- **Automatic typing features** help users enter and edit text more efficiently.

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1.4: Saving Files

Saving Documents in Microsoft Word

After creating a document in Microsoft Word, it is important to save your work so you can open, edit, and use it again later.

When saving a document, you must consider two important things:

- **File Name:** A clear and descriptive name that helps you identify the document.
- **File Location:** The folder or storage location where your document will be saved.

For example, a student preparing a business report might name the file **Business_Report.docx** and save it in a folder called Business Assignments.

Microsoft Word typically saves documents using the **.docx** file format. This file extension is automatically added when saving a standard Word document.

Using Save and Save As

Microsoft Word provides two main commands for saving documents.

- **Save:** Saves changes to the current document. If the document has already been saved, the changes are saved to the existing file.
- **Save As:** Allows you to save a document using a different file name, location, or file format.

You can access these commands through the **File** tab or by using keyboard shortcuts.

Common Keyboard Shortcuts

- **Ctrl + S:** Saves the current document.
- **F12:** Opens the Save As window in many desktop versions of Microsoft Word for Windows.

Note: Depending on your version of Word and your computer's settings, saving options may appear differently.

Choosing Where to Save Your Document

Microsoft Word allows users to save documents in different locations.

- **Computer Storage:** Saves the document directly to your computer, such as in the Documents folder.
- **Cloud Storage:** Saves the document online using a service such as Microsoft OneDrive, allowing you to access it from different devices when signed in.

Choose a location that is easy to remember and appropriate for your school or professional work.

Practice 1: The Solar System – Part 1

Purpose: Practice editing, moving text, correcting spelling errors, and saving a Microsoft Word document using a new file name.

Instructions: Complete the following steps in Microsoft Word.

1. Open the data file **The Solar System.docx** from your course files.
2. Use the **Spelling & Grammar** tool on the Review tab to correct spelling errors. The original practice file contains four errors to correct.

3. Select the two paragraphs at the top of page 2, beginning with **The Asteroid Belt** and ending with **ice and metal.**
4. Right-click the selected text and choose **Cut**.
5. Place your cursor in the blank paragraph before the paragraph beginning with **The Outer Planets.**
6. Press **Ctrl + V** to paste the selected text into its new location.
7. Press **F12** to open the Save As window, or use **File > Save As** if needed.
8. Save the document with the new file name **The Solar System1.docx**.
9. Choose a location on your computer where you can easily find the saved document.

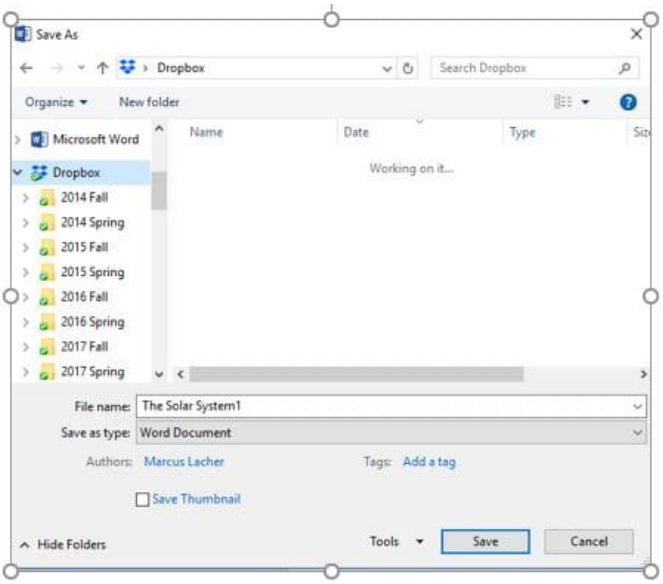


Figure 1. Save As Dialog Box in Microsoft Word.

Key Takeaways

- Saving a document allows you to access and edit it later.
- File names should be clear, descriptive, and easy to recognize.
- The Save command updates the current document.
- The Save As command allows you to create a copy with a different name or location.
- Word documents commonly use the .docx file extension.
- Documents can be saved locally or using cloud storage.

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2: CHAPTER 2-FORMATTING CHARACTERS

2.1: Selecting Text
2.2: Cut, Copy and Paste
2.3: Inserting Symbols
2.4: Defining Font and Text Attributes
2.5: Utilizing the Format Painter
2.6: Formatting Document Layout in Microsoft Word
2.7: Formatting Document Content in Microsoft Word

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2.1: Selecting Text

Learning Objectives

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

- **Select and highlight text** using the mouse and keyboard shortcuts in Microsoft Word.
- **Identify different methods** for selecting words, sentences, paragraphs, and entire documents.
- **Use text selection** to prepare content for editing and formatting.

Selecting Text in Microsoft Word

Selecting text is one of the most common tasks in Microsoft Word. Before changing the appearance of text, copying information, or deleting content, you often need to select the text you want to modify.

Microsoft Word provides several ways to select text using your mouse and keyboard.

Methods for Selecting Text

The following table explains different methods for selecting text in Microsoft Word using the mouse and keyboard.

Table 1. Methods for Selecting Text in Microsoft Word

Selection Method	Mouse or Keyboard Action	Result
Select a Word	Double-click a word.	Selects the entire word.
Select a Sentence	Hold down **Ctrl** and click anywhere in the sentence.	Selects the entire sentence.
Select a Paragraph	Triple-click anywhere inside the paragraph.	Selects the entire paragraph.
Select Multiple Words or Lines	Click and drag the mouse across the desired text.	Selects the text covered by the mouse movement.
Select the Entire Document	Press **Ctrl + A**.	Selects all text in the document.
Select Text Using the Keyboard	Hold down **Shift** while pressing the arrow keys.	Extends the selection one character or line at a time.
Select One Word at a Time	Hold down **Ctrl + Shift** and press the left or right arrow key.	Extends the selection one word at a time.

Note: These keyboard shortcuts apply to Microsoft Word for Windows. Some shortcuts may differ when using Word on a Mac or in a web browser.

Why Selecting Text Is Important

Text selection allows users to make changes to specific parts of a document without affecting the remaining content.

For example, you might select a heading to make it bold, highlight a sentence to change its font color, or select a paragraph to move it to another location.

Learning how to select text efficiently can help you save time when creating and editing professional documents.

Practice: Selecting Text

Purpose: Practice selecting text using different mouse and keyboard techniques.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the following sentence: **Microsoft Word helps users create professional business documents.**
3. Double-click the word **professional** to select it.
4. Hold down **Ctrl** and click inside the sentence to select the entire sentence.
5. Press **Ctrl + A** to select all text in the document.
6. Click outside the selected text to remove the selection.
7. Hold down **Shift** and use the arrow keys to select part of the sentence.

Check Your Understanding: Which keyboard shortcut allows you to select all text in a document?

Answer Ctrl + A.

Key Takeaways

- **Text selection** allows users to edit and format specific content.
- **Double-clicking** selects a word.
- **Triple-clicking** selects a paragraph.
- **Ctrl + A** selects the entire document.
- **Shift + Arrow Keys** allows users to select text using the keyboard.
- **Ctrl + Shift + Arrow Keys** allows users to extend a selection one word at a time.

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2.2: Cut, Copy and Paste

Learning Objectives

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

- **Use** Cut, Copy, and Paste to move or duplicate text in Microsoft Word.
- **Identify** common keyboard shortcuts for editing text.
- **Explain** the purpose of the Clipboard.
- **Choose** appropriate Paste Options when inserting content.

Cut, Copy, and Paste in Microsoft Word

Editing a document often involves moving or duplicating text, pictures, and other content. Microsoft Word provides three important commands to help you complete these tasks: **Cut, Copy, and Paste**.

These commands work with the **Clipboard**, a temporary storage area that holds content you have cut or copied.

Using the Cut Command

The **Cut** command removes selected content from its original location and places it on the Clipboard so it can be moved elsewhere.

To cut and move text:

1. Select the text you want to move.
2. Press **Ctrl + X**, or select Cut from the Home tab.
3. Place the insertion point where you want the text to appear.
4. Press **Ctrl + V** to paste the text into its new location.

Example: You can cut a paragraph from the end of a business report and paste it into an earlier section.

Using the Copy Command

The **Copy** command creates a duplicate of selected content without removing the original.

To copy and paste text:

1. Select the text you want to duplicate.
2. Press **Ctrl + C**, or select Copy from the Home tab.
3. Place the insertion point where you want the duplicate text.
4. Press **Ctrl + V** to paste the copied text.

Example: You might copy a company address from one business letter and paste it into another document.

Understanding Paste Options

Microsoft Word provides different Paste Options that control how pasted content appears in your document.

Common options include:

- **Keep Source Formatting:** Preserves the original formatting of the copied content.

- **Merge Formatting:** Adjusts the pasted content to better match the destination document.
- **Keep Text Only:** Pastes text without its original formatting.
- **Picture:** Pastes content as an image when this option is available.

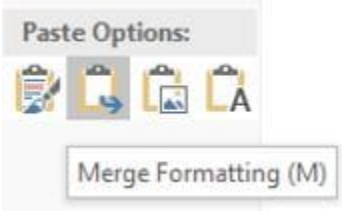


Figure 1. Paste Options in Microsoft Word.

Paste Options are especially useful when copying information from websites, emails, spreadsheets, or other documents.

Keyboard Shortcuts

The following shortcuts can help you edit documents more efficiently.

- **Ctrl + X:** Cut selected content.
- **Ctrl + C:** Copy selected content.
- **Ctrl + V:** Paste content from the Clipboard.

> **Mac Tip**
>
> On a Mac, use **Command + X** to cut, **Command + C** to copy, and **Command + V** to paste.

Practice: Editing a Business Document

Purpose: Practice moving and duplicating text using Cut, Copy, and Paste.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the following sentences on separate lines:
   - Our company provides excellent customer service.
   - Employees attend regular training sessions.
   - Customer satisfaction is our top priority.
3. Select the second sentence and press **Ctrl + X**.
4. Place the insertion point at the end of the document and press **Ctrl + V**.
5. Select the first sentence and press **Ctrl + C**.
6. Place the insertion point on a new line and press **Ctrl + V** to duplicate it.
7. Experiment with Paste Options to see how formatting changes.

Key Takeaways

- Cut removes selected content and places it on the Clipboard.
- Copy duplicates content while keeping the original.
- Paste inserts content from the Clipboard.
- Paste Options control how inserted content is formatted.
- Keyboard shortcuts can help users work more efficiently.

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2.3: Inserting Symbols

Learning Objectives

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

- Identify common symbols and special characters used in Microsoft Word.
- Insert symbols using the Insert tab and Symbol dialog box.
- Locate additional symbols by changing fonts and subsets.
- Use special characters appropriately in professional documents.

Inserting Symbols in Microsoft Word

Microsoft Word allows users to insert special characters and symbols that may not appear directly on a standard keyboard.

These symbols can be useful when creating professional documents, reports, resumes, and other written materials.

Common examples include:

- **Degree symbol (°):** Used when writing temperatures, such as 75°F.
- **Trademark symbol (™):** Used to identify trademarks.
- **Copyright symbol (©):** Used in copyright notices.
- **Registered trademark symbol (®):** Used for registered trademarks.
- **Accented letters:** Characters such as é in the word résumé.

How to Insert a Symbol

Follow these steps to insert a symbol into a Microsoft Word document:

1. Open your document in Microsoft Word.
2. Place the insertion point where you want the symbol to appear.
3. Click the **Insert** tab on the Ribbon.
4. Select **Symbol** from the Symbols group.
5. Choose a symbol from the available options, or select **More Symbols**.
6. In the Symbol dialog box, select the symbol you want.
7. Click **Insert** to add the symbol to your document.
8. Click **Close** when finished.

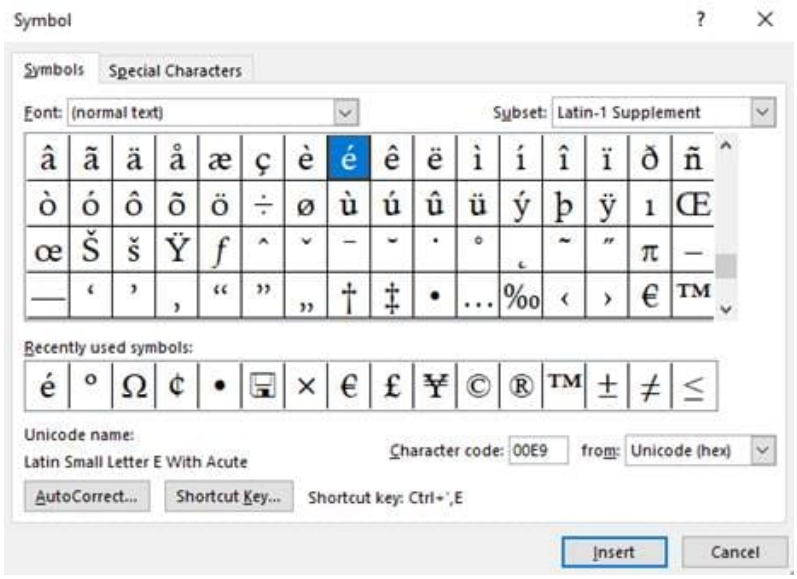


Figure 1. Symbol Dialog Box in Microsoft Word.

Exploring Additional Symbols

The Symbol dialog box contains a variety of characters and symbols that can be inserted into a document.

You can explore additional options by changing the **Font** or **Subset** settings in the dialog box.

For example:

- **Wingdings:** Provides a collection of symbols and decorative characters.
- **Webdings:** Contains additional graphical symbols.
- **Unicode Characters:** Include accented letters, mathematical symbols, and characters used in different languages.

Accessibility Tip: For important information, use standard Unicode characters and meaningful text rather than decorative symbol fonts whenever possible. This can help make documents easier to understand with assistive technology.

Practice: Inserting Special Characters

Purpose: Practice inserting symbols and special characters into a Microsoft Word document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the following heading: **Special Characters Practice**.
3. Insert the degree symbol and type: **Today's temperature is 75°F.**
4. Insert the trademark symbol after the word **ExampleBrand**.
5. Insert the copyright symbol and type the current year.
6. Insert the accented letter é and type the word **résumé**.
7. Save your document as **Symbols_Practice.docx**.

Key Takeaways

- Microsoft Word allows users to insert symbols not found directly on a keyboard.
- The Symbol command is located on the Insert tab.
- The More Symbols option provides access to additional characters.
- Font and Subset settings help users locate different symbols.

- Special characters can improve the accuracy and professionalism of documents.

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2.4: Defining Font and Text Attributes

Learning Objectives

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

- Identify common font and text formatting options in Microsoft Word.
- Change font type, size, color, and style.
- Use the Mini Toolbar to apply formatting.
- Apply professional font formatting practices to business documents.

Understanding Font and Text Formatting

Text formatting refers to the way text appears in a document. Formatting can improve readability, emphasize important information, and help organize content.

Microsoft Word provides several options for changing the appearance of text, including font type, size, color, and style.

A **font** is a set of characters with a particular design or typeface. Common fonts include Arial, Calibri, Aptos, Times New Roman, and Verdana.

Using the Font Group

The **Font group** is located on the Home tab of the Microsoft Word Ribbon. It contains tools for changing the appearance of selected text.

To format text:

1. Open your document in Microsoft Word.
2. Select the text you want to format.
3. Click the **Home** tab.
4. Locate the **Font** group.
5. Choose the formatting option you want to apply.

For example, you might increase the font size of a report title, make a heading bold, or change the color of important text.

Using the Mini Toolbar

The **Mini Toolbar** provides quick access to commonly used formatting commands. In many desktop versions of Word, it appears when you select text or right-click selected text.

The Mini Toolbar allows users to make formatting changes without returning to the Ribbon.

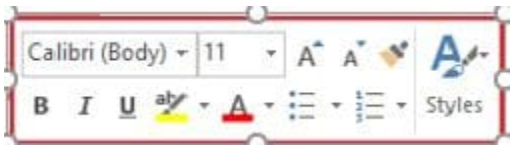


Figure 1. Mini Toolbar in Microsoft Word.

Common Font Formatting Commands

The following table describes common formatting tools available in Microsoft Word. Some may also appear on the Mini Toolbar.

Common Font and Text Formatting Commands in Microsoft Word

Formatting Command	Function
Font	Changes the typeface or design of selected text.
Font Size	Increases or decreases the size of selected text.
Bold	Makes selected text appear thicker for emphasis.
Italic	Slants selected text for emphasis or special formatting.
Underline	Adds a line beneath selected text.
Font Color	Changes the color of selected text.
Text Highlight Color	Adds a colored background behind selected text.
Increase Font Size	Makes selected text larger.
Decrease Font Size	Makes selected text smaller.
Clear All Formatting	Removes applied character formatting and returns text to its underlying style.

Best Practices for Professional Font Formatting

When creating business documents, choose fonts and formatting that make your work easy to read and professional in appearance.

- **Limit font choices:** Use one or two fonts throughout most documents to maintain consistency.
- **Choose readable fonts:** Fonts such as Arial, Aptos, Calibri, Verdana, and Times New Roman are commonly used in professional documents.
- **Use appropriate font sizes:** Body text is commonly formatted between 11 and 12 points, although larger sizes may improve readability for some audiences.
- **Emphasize important information:** Use bold or italic formatting when appropriate, but avoid applying too many styles at once.
- **Maintain consistency:** Use the same formatting for similar headings, paragraphs, and other document elements.
- **Consider accessibility:** Use readable font sizes and sufficient contrast between text and its background.

Font sizes are measured in **points (pt)**. One point equals 1/72 of an inch.

Practice: Formatting a Business Document

Purpose: Practice using common font formatting commands in Microsoft Word.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the heading **Business Communication Skills**.
3. Type the following sentence below the heading: **Professional formatting helps create clear and organized business documents.**
4. Select the heading and change its font size to **16 pt**.
5. Apply **Bold** formatting to the heading.
6. Select the sentence and change its font to **Arial**.
7. Change the sentence's font size to **12 pt**.
8. Select the word **Professional** and apply **Italic** formatting.
9. Use the Mini Toolbar to change the font color of the heading.

10. Save the document as **Font_Formatting_Practice.docx**.

Key Takeaways

- Font formatting controls the appearance of text in Microsoft Word.
- The Font group contains commands for changing font type, size, color, and style.
- The Mini Toolbar provides quick access to common formatting tools.
- Consistent formatting improves readability and professional appearance.
- Accessible formatting helps make documents easier for different audiences to read.

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2.5: Utilizing the Format Painter

Learning Objectives

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

- Explain the purpose of the Format Painter tool in Microsoft Word.
- Use Format Painter to copy formatting from one section of text to another.
- Apply the same formatting to multiple selections.
- Use consistent formatting to improve the appearance of professional documents.

Understanding the Format Painter Tool

The **Format Painter** tool allows you to copy formatting from one section of text and apply it to another section without copying the actual words.

For example, if you have formatted a heading using a specific font, size, and color, you can use Format Painter to apply the same formatting to another heading.

Format Painter is located in the **Clipboard** group on the **Home** tab of the Microsoft Word Ribbon.

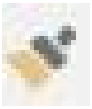


Figure 1. Format Painter Tool in Microsoft Word.

How to Use Format Painter

Follow these steps to copy formatting from one section of text to another:

1. Open a document in Microsoft Word.
2. Select the text that contains the formatting you want to copy.
3. Click the **Home** tab.
4. Locate the **Clipboard** group.
5. Click the **Format Painter** button.
6. Your mouse pointer will change to include a paintbrush symbol.
7. Select the destination text where you want to apply the formatting.



Figure 2. Format Painter Mouse Pointer.

Microsoft Word will apply the copied formatting to the selected destination text.

Applying Formatting to Multiple Selections

If you need to apply the same formatting to several sections of text, you can activate Format Painter for multiple uses.

1. Select the text containing the formatting you want to copy.
2. Double-click the **Format Painter** button on the Home tab.

3. Select the first section of text you want to format.
4. Continue selecting additional sections that need the same formatting.
5. Press **Esc** when you are finished to turn off Format Painter.

This feature is helpful when formatting multiple headings, labels, or other repeated elements in a document.

Practice: Using Format Painter

Purpose: Practice copying and applying consistent formatting in a Microsoft Word document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the following headings on separate lines:
   - Introduction
   - Business Operations
   - Customer Service
   - Conclusion
3. Select the heading **Introduction**.
4. Change its font size to **16 pt**, apply **Bold**, and choose a font color.
5. With the formatted heading selected, double-click **Format Painter**.
6. Apply the same formatting to the other three headings.
7. Press **Esc** to turn off Format Painter.
8. Save the document as **Format_Painter_Practice.docx**.

Key Takeaways

- Format Painter copies formatting without copying the original text.
- The tool is located in the Clipboard group on the Home tab.
- Click Format Painter once to apply formatting to one selection.
- Double-click Format Painter to apply formatting to multiple selections.
- Press Esc to stop using Format Painter.
- Format Painter is also available in other Microsoft Office applications, including Excel and PowerPoint.

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2.6: Formatting Document Layout in Microsoft Word

Learning Objectives

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

- Format page setup, margins, orientation, and paper size.
- Adjust line spacing and create columns.
- Insert section breaks and apply different formatting to document sections.

Understanding Document Layout

Document layout refers to how text, images, and other elements are arranged on a page. Microsoft Word provides several tools for creating professional documents that are organized, readable, and easy to navigate.

The **Layout** tab contains commands for adjusting margins, page orientation, paper size, columns, paragraph spacing, and section breaks.

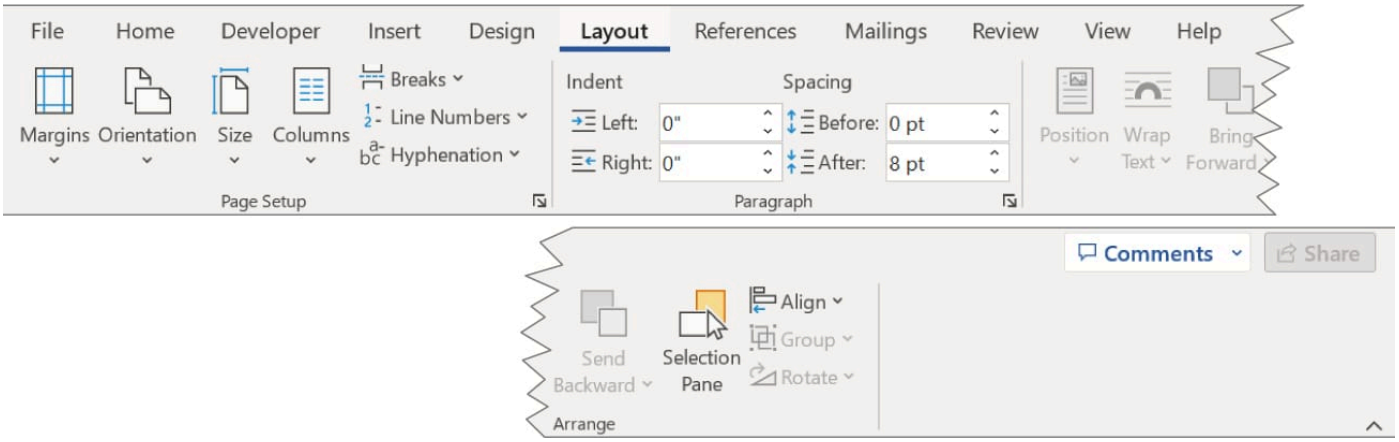


Figure 1. Layout Tab in Microsoft Word. Used with permission from Microsoft.

Page Setup

The **Page Setup** group on the Layout tab allows you to control the overall appearance of your document.

Common page setup options include:

- **Margins:** Control the blank space around the edges of a page.
- **Orientation:** Determines whether a page is vertical or horizontal.
- **Size:** Controls the dimensions of the paper.
- **Columns:** Divides text into multiple vertical sections.
- **Breaks:** Controls where pages and sections begin.

Professional documents often use readable fonts, consistent spacing, and clearly organized sections. Formatting requirements may vary depending on the purpose of the document and the intended audience.

Real-World Application: Style Guides

Many organizations and academic institutions use **style guides** to establish consistent document formatting.

Common examples include APA, MLA, and Chicago style. These guides may specify requirements for margins, font sizes, line spacing, headings, and citations.

When preparing a professional or academic document, always review the formatting requirements provided by your instructor, employer, or organization.

Adjusting Page Margins

Margins are the blank spaces between the edges of a page and the document content. They help make documents easier to read and provide space for printing and binding.

To change margins:

1. Open your document in Microsoft Word.
2. Click the **Layout** tab.
3. Select **Margins**.
4. Choose a preset option, such as Normal.
5. For specific measurements, select **Custom Margins**.
6. Enter your preferred measurements and click **OK**.

The Normal margin setting in many Word documents is one inch on all sides.

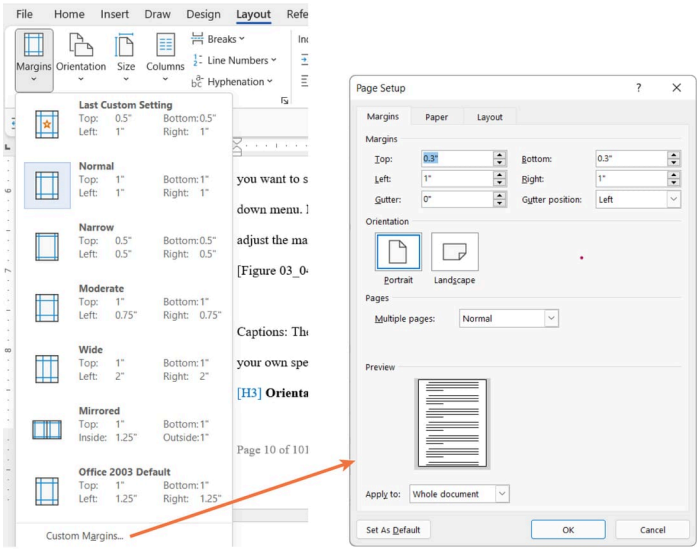


Figure 2. Preset and Custom Margin Settings. Used with permission from Microsoft.

Changing Page Orientation

Page orientation determines whether a page is displayed vertically or horizontally.

- **Portrait:** A vertical page layout commonly used for letters, reports, and essays.
- **Landscape:** A horizontal page layout often used for wide tables, charts, and presentations.

To change page orientation:

1. Click the **Layout** tab.
2. Select **Orientation**.
3. Choose **Portrait** or **Landscape**.

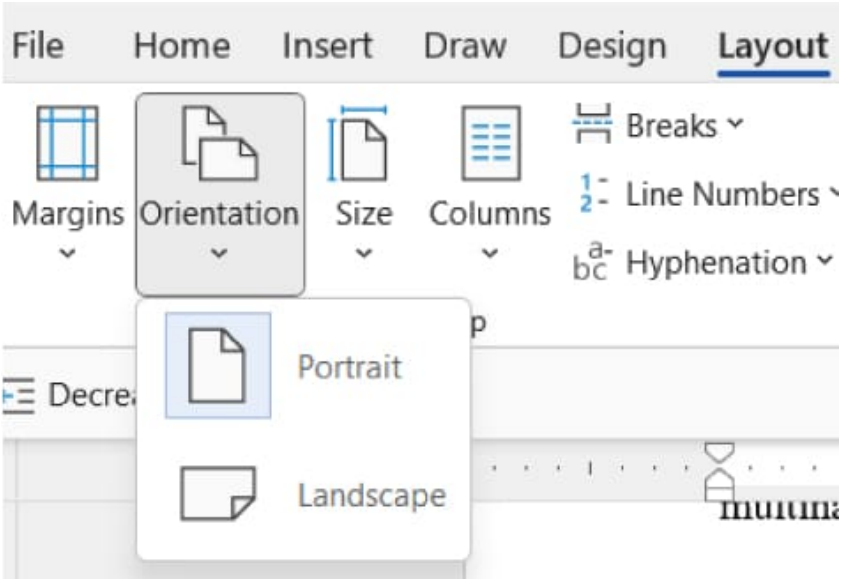


Figure 3. Page Orientation Options. Used with permission from Microsoft.

Adjusting Line Spacing

Line spacing refers to the vertical distance between lines of text within a paragraph.

Common line-spacing options include single, 1.5, and double spacing. The default setting depends on the version of Word and the document style.

To change line spacing:

1. Select the paragraph or text you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Line and Paragraph Spacing**.
5. Choose the desired spacing option.

Consistent line spacing helps maintain a professional appearance and improves readability.

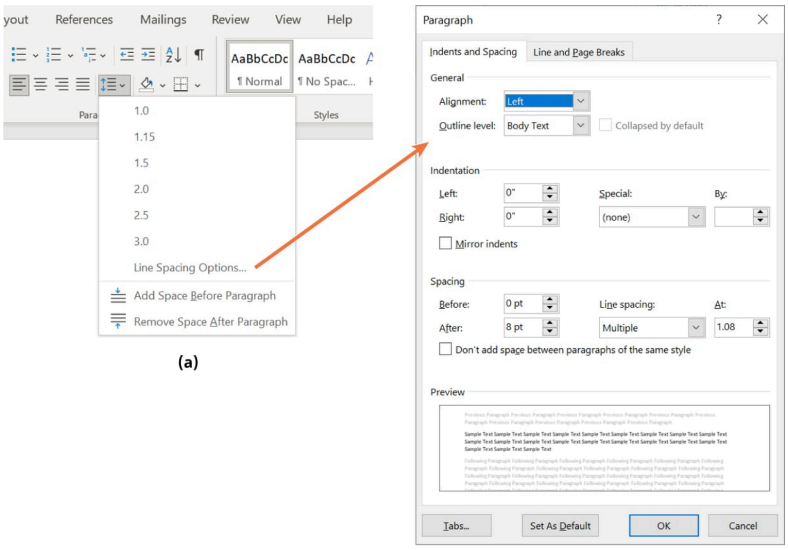


Figure 4. Line and Paragraph Spacing Options. Used with permission from Microsoft.

Changing Page Size

Page size determines the physical dimensions of a document when printed.

Two common paper sizes include:

- **Letter:** 8.5 × 11 inches, commonly used in the United States.
- **A4:** Approximately 8.27 × 11.69 inches, commonly used internationally.

To change the page size:

1. Click the **Layout** tab.
2. Select **Size**.
3. Choose a paper size from the available options.
4. If needed, select an option for additional or custom paper sizes.

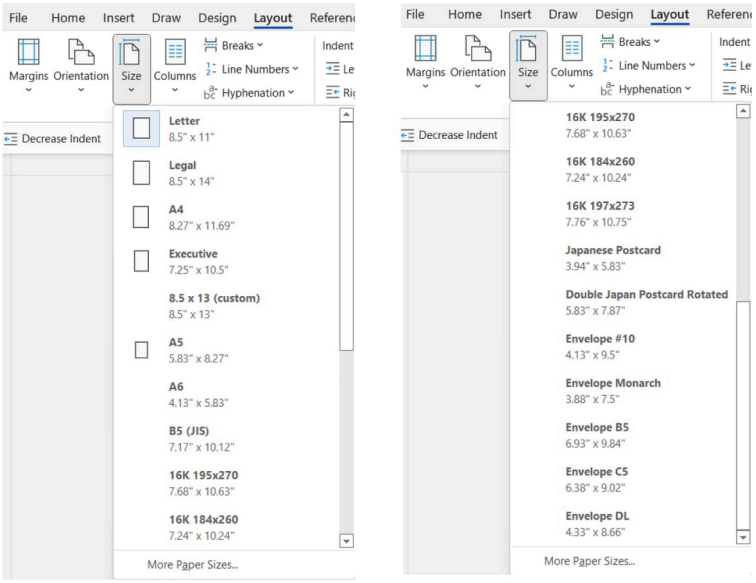


Figure 5. Paper Size Options in Microsoft Word. Used with permission from Microsoft.

Creating Columns

Columns divide text into two or more vertical sections. They are commonly used in newsletters, brochures, and other publications.

To create columns:

1. Select the text you want to arrange into columns.
2. Click the **Layout** tab.
3. Select **Columns**.
4. Choose One, Two, Three, Left, or Right.
5. For additional settings, select **More Columns**.

The More Columns dialog allows you to adjust the number of columns, column widths, spacing, and optional dividing lines.

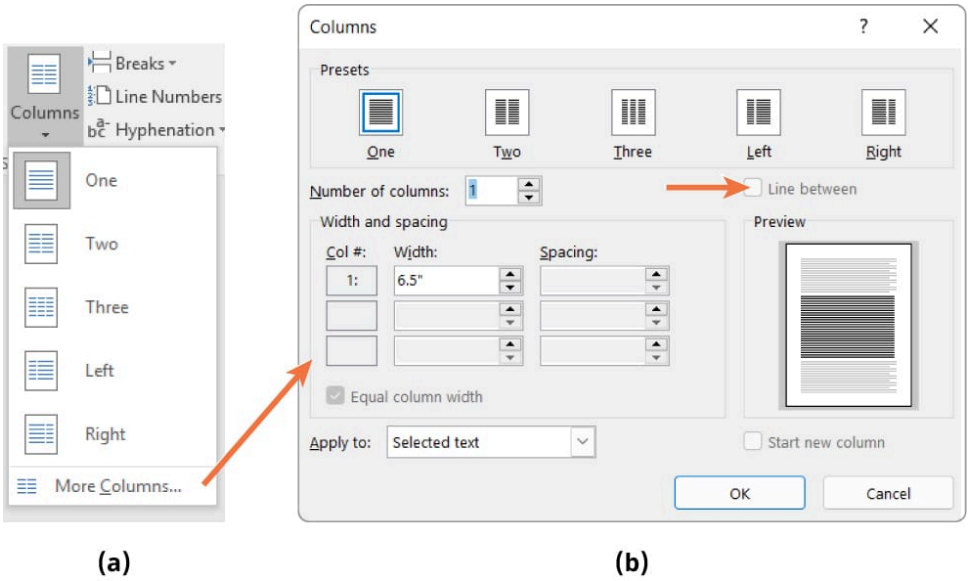


Figure 6. Creating and Customizing Columns. Used with permission from Microsoft.

Working with Section Breaks

A **section break** divides a Word document into separate sections. Each section can have different formatting settings while remaining part of the same document.

Section breaks are especially useful when creating longer reports, manuals, and professional documents.

For example, a business report might include:

- A title page without a page number.
- A table of contents with Roman numeral page numbers.
- A main report beginning with page number 1.
- A landscape page containing a wide chart.

How to Insert a Section Break

1. Place the insertion point where you want the new section to begin.
2. Click the **Layout** tab.
3. Select **Breaks**.
4. Under Section Breaks, choose **Next Page**.
5. Word will begin a new section on the following page.

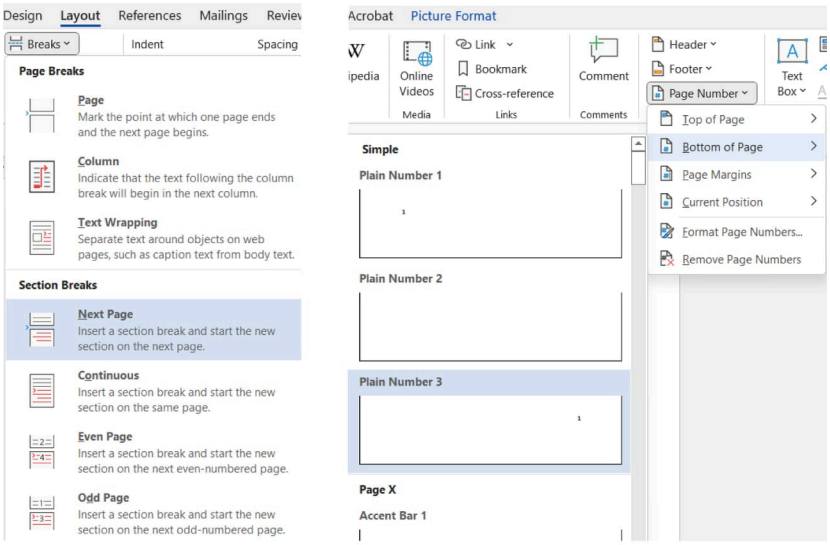


Figure 7. Section Break and Page Number Options. Used with permission from Microsoft.

Changing Page Numbering Between Sections

Section breaks allow you to control page numbering in different parts of a document.

1. Insert a section break before the part of the document where numbering should change.
2. Double-click the header or footer in the new section.
3. Turn off **Link to Previous** if the new section needs independent numbering.
4. Select **Page Number** and choose a position.
5. Select **Page Number > Format Page Numbers**.
6. Under Page numbering, choose **Start at** and enter 1.
7. Close the header or footer.

These settings allow users to create professional reports with different page-numbering formats.

Using Different Page Orientations

Section breaks also allow you to use portrait and landscape pages within the same document.

For example, a report may use portrait orientation for written content and landscape orientation for a wide table or chart.

To change the orientation of one section:

1. Insert section breaks before and after the content that needs a different orientation.
2. Place the insertion point within that section.
3. Click the **Layout** tab.
4. Select **Orientation**.
5. Choose **Landscape** or **Portrait**.
6. Review the document to confirm that only the intended section changed.

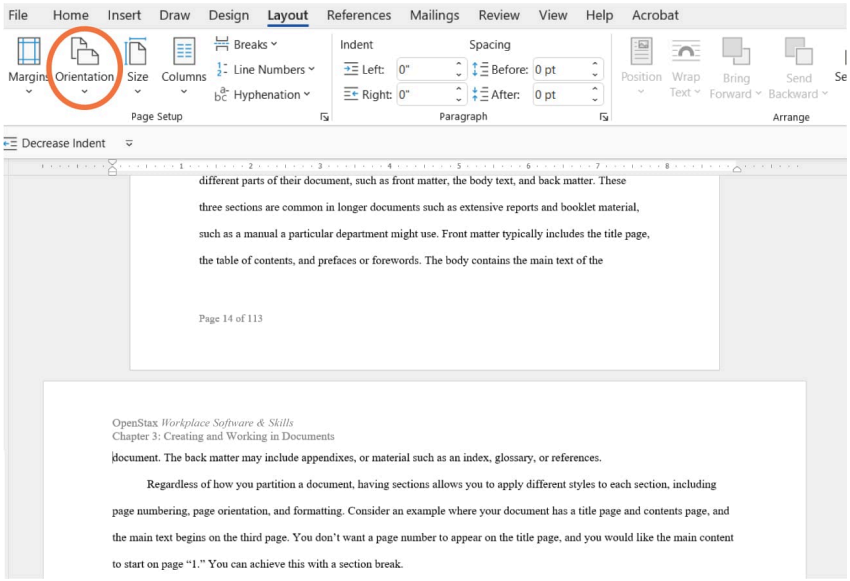


Figure 8. Using Different Page Orientations Within One Document. Used with permission from Microsoft.

Practice: Formatting a Business Report

Purpose: Practice using page layout tools to create a professional business document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the heading **Business Market Trends Report**.
3. Enter two short paragraphs describing a business or industry of your choice.
4. Set the page margins to **1 inch** on all sides.
5. Change the page orientation to **Landscape**, then return it to **Portrait**.
6. Set the paper size to **Letter (8.5 × 11 inches)**.
7. Apply **1.5 line spacing** to the paragraphs.
8. Select the two paragraphs and format them into **two columns**.
9. Insert a **Next Page section break** after the report content.
10. Type **Appendix** on the new page.
11. Save the document as **Business_Layout_Practice.docx**.

Key Takeaways

- The Layout tab contains tools for controlling document appearance.
- Margins create space around the content of a page.
- Orientation determines whether pages are portrait or landscape.
- Line spacing controls the distance between lines of text.
- Page size determines the dimensions of printed documents.
- Columns organize text into vertical sections.
- Section breaks allow different formatting and numbering within the same document.

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2.7: Formatting Document Content in Microsoft Word

Learning Objectives

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

- Format font types, sizes, and styles in Microsoft Word.
- Adjust paragraph spacing, indentation, and alignment.
- Apply heading styles to organize a document.
- Control how text and graphics appear together using text wrapping.

Understanding Document Content Formatting

Professional documents should be clear, organized, and easy to read. Microsoft Word provides several formatting tools that help you improve the appearance of text, paragraphs, headings, and images.

For example, when preparing a business market trends report, you might use consistent fonts, clear headings, appropriate paragraph spacing, and properly positioned images to make the document easier for readers to understand.

Formatting Fonts

A **font** is the design or appearance of text. Microsoft Word allows you to change font type, size, color, and style using the Font group on the Home tab.

Understanding Font Types

Fonts are commonly classified into two categories:

- **Serif fonts:** Include small decorative strokes at the ends of letters. Examples include Times New Roman, Cambria, and Garamond.
- **Sans serif fonts:** Do not include these decorative strokes. Examples include Arial, Calibri, and Tahoma.

Both types can be appropriate for professional documents. Choose fonts that are readable and suitable for your audience.

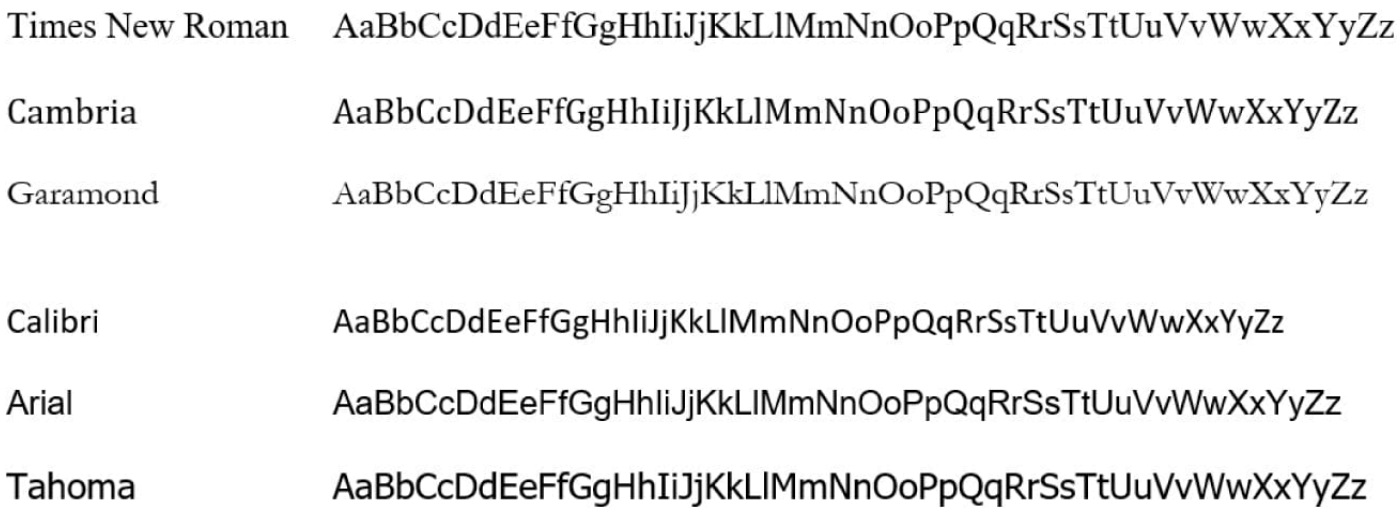


Figure 1. Examples of Serif and Sans Serif Fonts. Used with permission from Microsoft.

Changing Font Type and Size

To change the appearance of text:

1. Open your document in Microsoft Word.
2. Select the text you want to format.
3. Click the **Home** tab.
4. Locate the **Font** group.
5. Choose a font from the Font drop-down menu.
6. Select a font size, such as 11 or 12 points.

Many professional documents use 11- or 12-point body text, although the appropriate size depends on the document and audience. Modern versions of Microsoft Word commonly use Aptos as the default font, but this can vary by version or template.

Mac Tip

Some fonts available in Word for Windows may not be installed on a Mac, and vice versa. If you share a document between computers, choose commonly available fonts or check that the formatting displays correctly.

Applying Font Styles

Microsoft Word includes additional formatting options that help emphasize or modify text.

- **Bold:** Makes text appear thicker.
- **Italic:** Slants text for emphasis.
- **Underline:** Places a line beneath text.
- **Font Color:** Changes the color of text.
- **Superscript:** Raises text above the normal line, such as the 2 in x^2.
- **Subscript:** Lowers text below the normal line, such as the 2 in H_2O.
- **Change Case:** Converts selected text to uppercase, lowercase, or other capitalization styles.

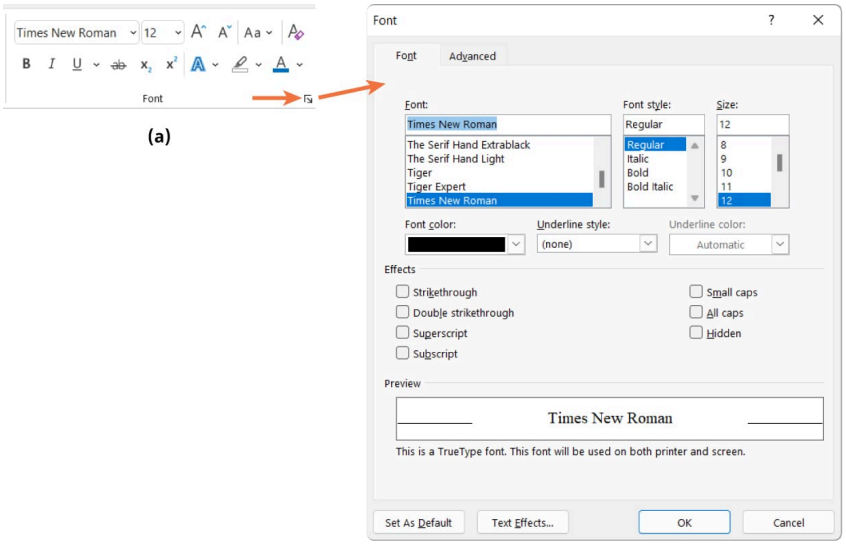


Figure 2. Font Formatting Tools and Settings. Used with permission from Microsoft.

Formatting Paragraphs

Paragraph formatting controls how text is arranged within and between paragraphs. Common options include line spacing,

paragraph spacing, indentation, and alignment.

Adjusting Line and Paragraph Spacing

Line spacing controls the vertical distance between lines of text within a paragraph.

Paragraph spacing controls the amount of space before or after a paragraph.

To adjust spacing:

1. Select the paragraph or paragraphs you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Line and Paragraph Spacing**.
5. Choose a spacing option, such as 1.0, 1.5, or 2.0.
6. For additional settings, open **Line Spacing Options**.

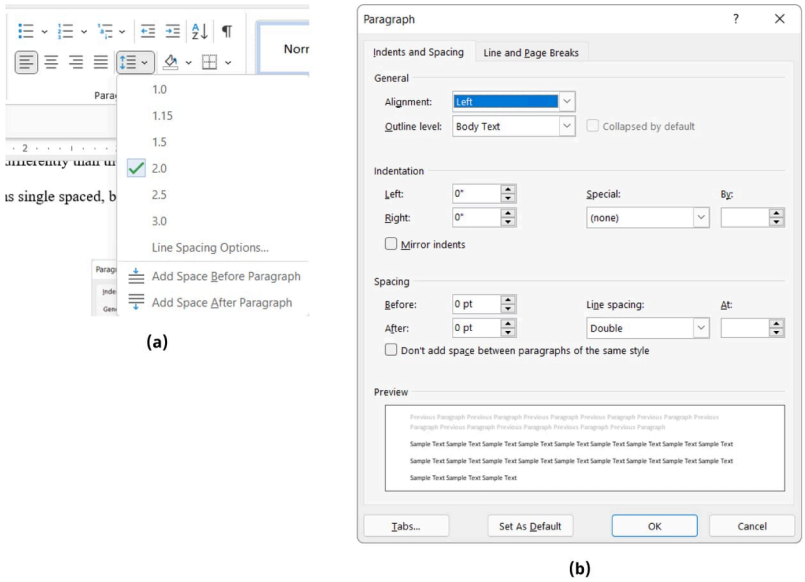


Figure 3. Line and Paragraph Spacing Settings. Used with permission from Microsoft.

Using Paragraph Indentation

Indentation controls the distance between a paragraph and the page margin.

Two common approaches to separating paragraphs are:

- **First-line indentation:** Moves the first line of a paragraph inward.
- **Spacing between paragraphs:** Adds extra space after a paragraph without requiring an indentation.

Both approaches can improve readability. The best choice depends on the type of document and any required formatting guidelines.

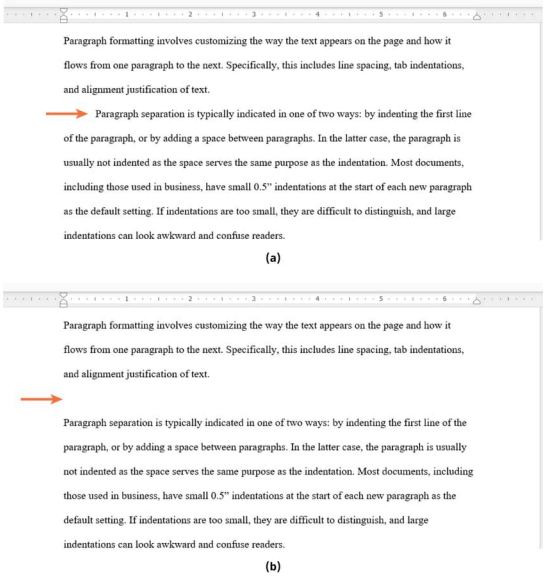


Figure 4. First-Line Indentation Compared with Paragraph Spacing. Used with permission from Microsoft.

Changing Paragraph Alignment

Paragraph alignment determines how text is positioned between the left and right margins.

Microsoft Word offers four common alignment options:

- **Align Left:** Text lines up along the left margin.
- **Center:** Text is centered between the margins.
- **Align Right:** Text lines up along the right margin.
- **Justify:** Word adjusts spacing so text aligns with both margins, except typically the last line of a paragraph.

Left alignment is commonly preferred for body text because it is easy to read. Justified text may be appropriate for certain publications, but it can create uneven spaces between words.

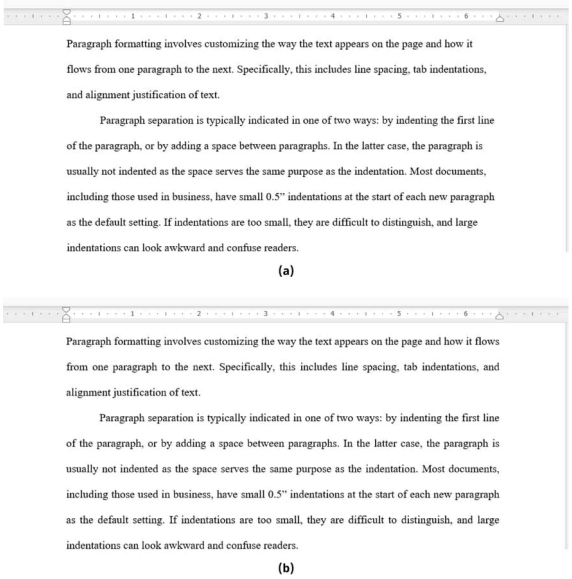


Figure 5. Left Alignment and Full Justification. Used with permission from Microsoft.

Using Heading Styles

Headings organize a document into sections and help readers understand the structure of the information.

Microsoft Word includes built-in heading styles that provide consistent formatting and help create an accessible document.

Applying Heading Styles

To apply a heading style:

1. Open a document in Microsoft Word.
2. Select the text you want to use as a heading.
3. Click the **Home** tab.
4. Locate the **Styles** group.
5. Select **Heading 1** for a major section.
6. Use **Heading 2** or **Heading 3** for subsections.

For example, a business report might include these major headings:

- Introduction and Executive Summary
- Industry and Market Analysis
- Competition
- SWOT Analysis
- Recommendations and Key Findings
- Conclusion

After applying heading styles, you can use Word's **Navigation Pane** to move between sections of your document.

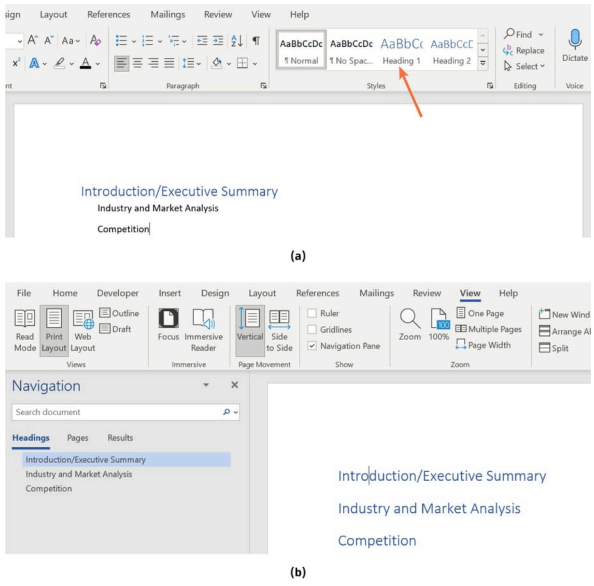


Figure 6. Applying Heading Styles and Using the Navigation Pane. Used with permission from Microsoft.

Accessibility Tip

Use Word's built-in heading styles rather than only making text larger or bold. Heading styles help screen readers identify the structure of a document and allow readers to navigate between sections.

Adjusting Graphic and Text Layouts

When you insert an image into Microsoft Word, you can control how text appears around it.

This feature is called **text wrapping**.

Understanding Text Wrapping Options

Common text wrapping options include:

- **In Line with Text:** Places the image within a line of text.
- **Square:** Wraps text around the rectangular boundary of an image.
- **Tight:** Wraps text more closely around the image's visible shape.
- **Top and Bottom:** Places text above and below the image.
- **Behind Text:** Places the image behind text.
- **In Front of Text:** Places the image over text.

For most instructional and professional documents, **In Line with Text** is often the simplest option for accessibility and predictable placement. Other wrapping options may be useful for newsletters and brochures.

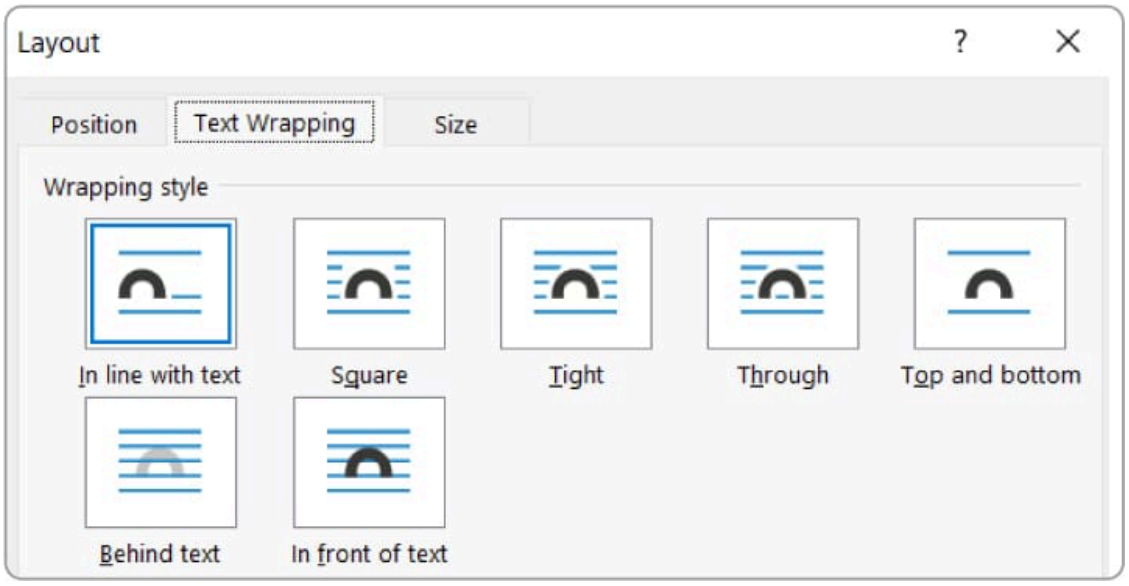


Figure 7. Text Wrapping Options in Microsoft Word. Used with permission from Microsoft.

Inserting and Positioning an Image

To insert an image and adjust text wrapping:

1. Place the insertion point where you want the image.
2. Click the **Insert** tab.
3. Select **Pictures** and choose an image source.
4. Insert the image into your document.
5. Select the image.
6. Click the **Layout Options** button next to the image, or select **Wrap Text** from the Picture Format tab.
7. Choose the wrapping option that works best for your document.

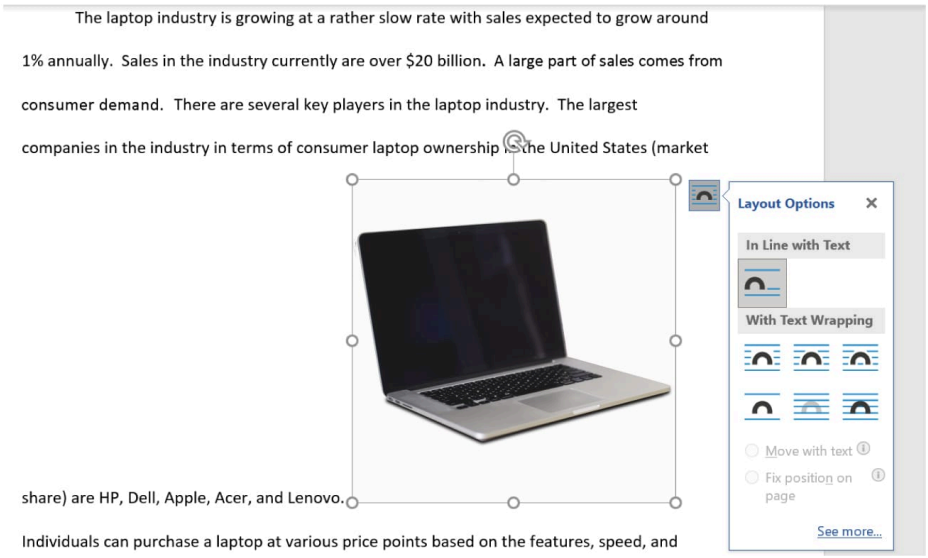


Figure 8. Inserting an Image and Accessing Layout Options. Used with permission from Microsoft.

For example, when creating a business report, you might insert a product image and select Square wrapping to position the text beside it.

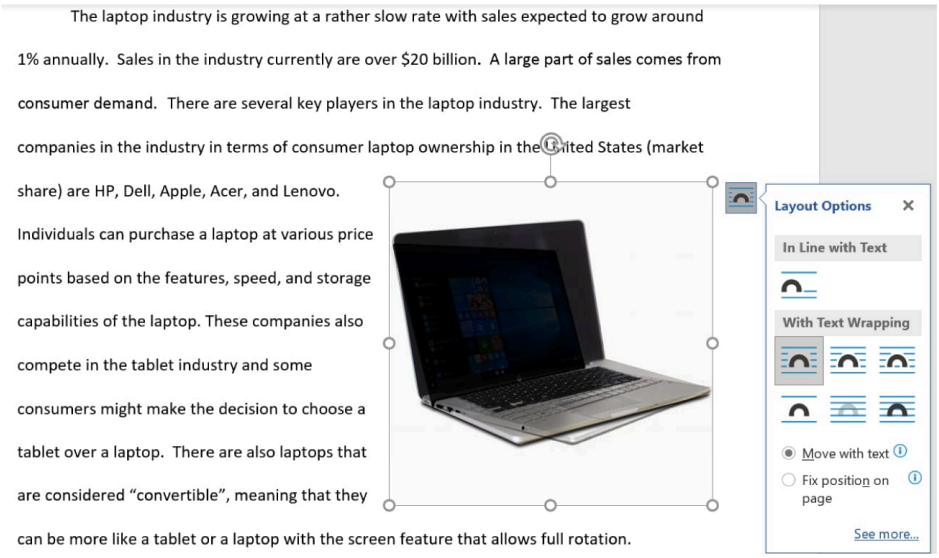


Figure 9. Positioning an Image with Text Wrapping. Used with permission from Microsoft.

Practice: Formatting a Business Report

Purpose: Practice formatting text, paragraphs, headings, and images in Microsoft Word.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **Business Market Trends Report**.
3. Type three short paragraphs describing a business or industry of your choice.
4. Change the body text font to **Arial** and the font size to **12 pt**.
5. Apply **Bold** formatting to the title.
6. Set the paragraph line spacing to **1.5**.
7. Apply left alignment to the body paragraphs.

8. Add the headings **Introduction**, **Market Analysis**, and **Recommendations**.
9. Apply the **Heading 1** style to each heading.
10. Open the Navigation Pane to confirm that your headings appear.
11. Insert an appropriate image into the document.
12. Experiment with the **Square** and **Top and Bottom** text wrapping options.
13. Save the document as **Business_Content_Formatting_Practice.docx**.

Key Takeaways

- Font formatting changes the appearance of text.
- Paragraph formatting controls spacing, indentation, and alignment.
- Heading styles organize documents and improve accessibility.
- The Navigation Pane helps users move between document sections.
- Text wrapping controls how text and images appear together.
- Consistent formatting improves readability and professionalism.

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3: CHAPTER 3- PARAGRAPH, LISTS, AND PAGE LAYOUT

3.1: Creating Bulleted and Numbered Lists
3.2: Setting Paragraph Alignment and Hyphenation
3.3: Indenting Paragraphs
3.4: Setting Tabs and Tab Stops
3.5: Formatting Document Layout in Microsoft Word
3.6: Formatting Document Content in Microsoft Word

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3.1: Creating Bulleted and Numbered Lists

Learning Objectives

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

- **Identify** the differences between bulleted and numbered lists.
- **Create** bulleted and numbered lists in Microsoft Word.
- **Customize** bullets, numbering, and list indentation.
- **Apply** lists to organize information in professional documents.

Creating Bulleted and Numbered Lists

Bulleted and numbered lists help organize information and make documents easier to read.

Microsoft Word provides tools for creating and formatting lists using the **Paragraph** group on the **Home** tab.

There are two common types of lists:

- **Bulleted Lists:** Used when items do not need to appear in a specific order.
- **Numbered Lists:** Used when items must follow a sequence, such as steps in a process.

Understanding Bulleted Lists

A **bulleted list** organizes related information without indicating a specific order or priority.

For example, a grocery shopping list might include:

- Milk
- Bread
- Eggs
- Fruit

Each item is equally important, and the order does not affect the purpose of the list.

Microsoft Word allows users to customize bullet symbols, including circles, squares, check marks, and other available symbols.

Understanding Numbered Lists

A **numbered list** organizes information in a specific sequence or order.

For example, instructions for preparing a simple recipe might include:

1. Gather the ingredients.
2. Preheat the oven.
3. Mix the ingredients.
4. Place the mixture in the oven.
5. Remove the finished dish and allow it to cool.

Numbered lists are especially useful for instructions, procedures, and tasks that must be completed in order.



Figure 1. Comparing Bulleted and Numbered Lists Using a Recipe Example.

How to Create a Bulleted List

Follow these steps to create a bulleted list in Microsoft Word:

1. Open your document in Microsoft Word.
2. Type the items you want to include, placing each item on a separate line.
3. Select the paragraphs you want to format.
4. Click the **Home** tab.
5. Locate the **Paragraph** group.
6. Click the **Bullets** button.
7. Word will add a bullet to each selected paragraph.

To change the bullet style, select the arrow next to the Bullets button and choose another available symbol.

How to Create a Numbered List

Follow these steps to create a numbered list:

1. Open your document in Microsoft Word.
2. Type the steps or items you want to organize.
3. Select the paragraphs you want to number.
4. Click the **Home** tab.
5. Locate the **Paragraph** group.
6. Click the **Numbering** button.
7. Word will automatically assign numbers to the selected paragraphs.

You can change the numbering format by selecting the arrow next to the Numbering button.

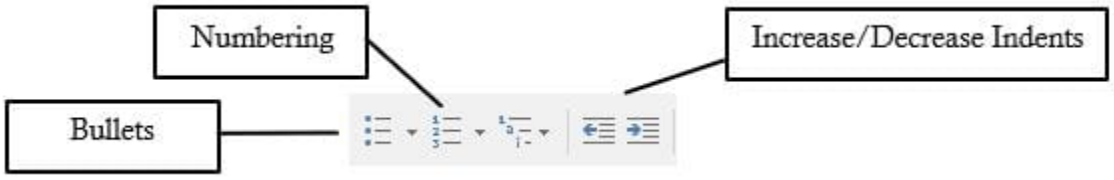


Figure 2. Bullets and Numbering Commands in Microsoft Word.

Adjusting List Indentation

Indentation controls how far a list is positioned from the left margin.

Microsoft Word provides commands to increase or decrease indentation.

To adjust list indentation:

1. Select the list items you want to adjust.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Increase Indent** to move the list farther to the right.
5. Select **Decrease Indent** to move the list closer to the left margin.

Indentation can also help create multilevel lists with main topics and supporting details.

Removing Bullets or Numbering

To remove list formatting:

1. Select the paragraphs containing the list.
2. Click the **Home** tab.
3. Click the active **Bullets** or **Numbering** button.
4. The list formatting will be removed while the text remains in the document.

Video Tutorial: Microsoft Word Lists

Watch the video below for additional guidance on using Microsoft Word. You can also open the video directly or scan the QR code using your phone.

Watch the Microsoft Word video tutorial on YouTube.

Practice: Creating Lists in Microsoft Word

Purpose: Practice creating and formatting bulleted and numbered lists in a Microsoft Word document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the heading **Business Office Checklist**.
3. Type the following items on separate lines:
    - Computer
    - Printer
    - Office Supplies
    - Telephone
4. Select the four items and apply **Bullets**.
5. Below the list, type the heading **Steps for Preparing a Business Report**.
6. Type the following steps on separate lines:
    1. Research the topic.
    2. Organize the information.
    3. Write the report.
    4. Review and edit the document.
    5. Submit the final report.
7. Select the five steps and apply **Numbering**.
8. Experiment with different bullet and numbering styles.
9. Use the Increase Indent and Decrease Indent commands to adjust the lists.

10. Save the document as **Bulleted_Numbered_Lists_Practice.docx**.

Key Takeaways

- Bulleted lists organize information without requiring a specific order.
- Numbered lists organize steps or information in a sequence.
- The Bullets and Numbering commands are located in the Paragraph group on the Home tab.
- Users can customize list symbols, numbering formats, and indentation.
- Lists improve document organization, readability, and professional appearance.

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3.2: Setting Paragraph Alignment and Hyphenation

Learning Objectives

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

- **Identify** the four paragraph alignment options in Microsoft Word.
- **Apply** left, center, right, and justified alignment to paragraphs.
- **Display** and hide paragraph formatting marks.
- **Use** automatic and manual hyphenation to control how words appear at the end of lines.
- **Apply** appropriate paragraph formatting to improve document readability.

Understanding Paragraph Alignment

Paragraph alignment determines how text is positioned between the left and right margins of a document.

Alignment settings apply to an entire paragraph. In Microsoft Word, a new paragraph is created when you press the **Enter** key.

Microsoft Word provides four common paragraph alignment options:

- **Align Left:** Text lines up evenly along the left margin, while the right edge remains uneven. This is commonly used for letters, reports, and other professional documents.
- **Center:** Text is positioned evenly between the left and right margins. This is often used for titles and headings.
- **Align Right:** Text lines up evenly along the right margin, while the left edge remains uneven. This is sometimes used for dates, headers, and footers.
- **Justify:** Word adjusts spacing so text aligns with both the left and right margins, except typically the last line of a paragraph. This is common in newspapers, books, and some publications.

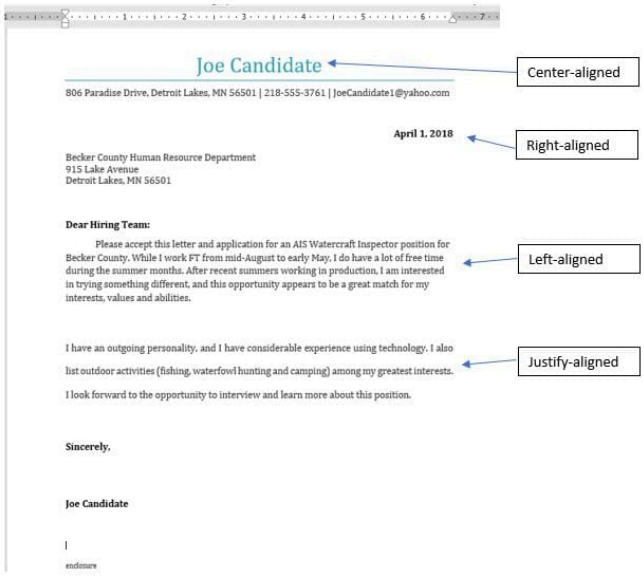


Figure 1. Four Paragraph Alignment Options in Microsoft Word.

How to Change Paragraph Alignment

Follow these steps to change the alignment of a paragraph:

1. Open your document in Microsoft Word.
2. Place the insertion point anywhere within the paragraph you want to format.
3. Click the **Home** tab.
4. Locate the **Paragraph** group.
5. Select one of the alignment options:
   - Align Left
   - Center
   - Align Right
   - Justify
6. Word will apply the selected alignment to the paragraph.

Tip: To change the alignment of multiple paragraphs, select the paragraphs before choosing an alignment option.

Displaying Paragraph Formatting Marks

Microsoft Word includes a feature called **Show/Hide**, which displays formatting marks that are normally hidden.

These marks can help you identify paragraph breaks, spaces, tabs, and other formatting characters while editing a document.

To display formatting marks:

1. Click the **Home** tab.
2. Locate the **Paragraph** group.
3. Click the **Show/Hide** button, represented by the paragraph symbol (¶).
4. Click the button again to hide the formatting marks.



Figure 2. Show/Hide Paragraph Formatting Marks.

Understanding Hyphenation

Hyphenation is the process of dividing a word at the end of a line using a hyphen.

Hyphenation allows part of a word to remain at the end of one line while the rest continues on the next line.

This feature can help reduce uneven spacing and improve the appearance of text, especially in narrow columns or justified paragraphs.

Microsoft Word provides two main hyphenation options:

- **Automatic Hyphenation:** Word determines where words can be divided and inserts hyphens when needed.
- **Manual Hyphenation:** Word allows you to review and choose suggested hyphenation points.

How to Apply Hyphenation

Follow these steps to use hyphenation in Microsoft Word:

1. Open your document in Microsoft Word.
2. Click the **Layout** tab.
3. Locate the **Page Setup** group.
4. Select **Hyphenation**.
5. Choose one of the available options:
   - **None:** Turns off automatic hyphenation.
   - **Automatic:** Allows Word to hyphenate words automatically.
   - **Manual:** Allows you to review suggested hyphenation points.
6. Review the document to make sure the text remains readable.

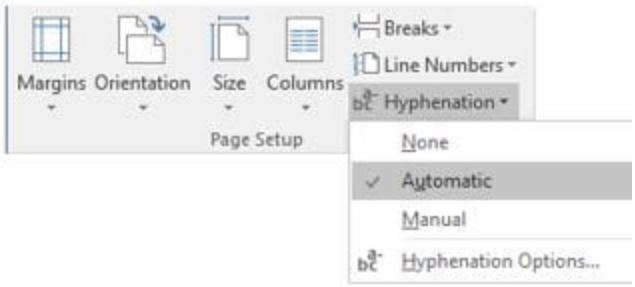


Figure 3. Hyphenation Options in Microsoft Word.

Customizing Hyphenation Settings

Microsoft Word also provides additional settings through the **Hyphenation Options** dialog box.

Depending on the version of Word, these settings may allow you to:

- Turn automatic hyphenation on or off.
- Control whether words written in uppercase are hyphenated.
- Adjust the hyphenation zone.
- Limit consecutive lines that end with hyphens.

Important: Avoid inserting ordinary hyphens manually just to break words at the end of a line. These hyphens may remain in the text if the document layout changes.

If you need to indicate an optional word break, use Word's hyphenation tools or an optional hyphen rather than inserting a permanent hyphen.

Practice: Paragraph Alignment and Hyphenation

Purpose: Practice using paragraph alignment, formatting marks, and hyphenation tools in Microsoft Word.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **Business Communication Report**.
3. Type four short paragraphs about the importance of professional communication in the workplace.
4. Select the title and apply **Center** alignment.
5. Apply **Align Left** to the first paragraph.
6. Apply **Justify** to the second paragraph.
7. Apply **Center** to the third paragraph.
8. Apply **Align Right** to the fourth paragraph.
9. Click the **Show/Hide** button to display formatting marks, then hide them again.
10. Select **Layout > Hyphenation > Automatic**.
11. Review the document and observe whether Word divides any words at the ends of lines.
12. Save the document as **Paragraph_Alignment_Practice.docx**.

Key Takeaways

- Paragraph alignment controls how text is positioned between page margins.
- Microsoft Word provides left, center, right, and justified alignment.
- The Show/Hide button displays formatting marks such as paragraph breaks and spaces.
- Hyphenation helps control how words are divided at the ends of lines.
- Automatic and manual hyphenation can improve the appearance of certain documents.
- Consistent formatting helps make professional documents easier to read.

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3.3: Indenting Paragraphs

Learning Objectives

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

- **Explain** the purpose of paragraph indentation in Microsoft Word.
- **Identify** the differences between left, right, first-line, and hanging indents.
- **Adjust** paragraph indentation using the Ribbon, ruler, and Paragraph dialog box.
- **Apply** indentation to professional documents, including business letters and references.

Understanding Paragraph Indentation

Paragraph indentation controls how far a paragraph's text is positioned from the left or right page margins.

Indentation helps organize information, separate sections, and improve the appearance of professional documents.

Microsoft Word provides four common indentation options:

- **Left Indent:** Moves all lines of a paragraph away from the left margin.
- **Right Indent:** Moves all lines of a paragraph away from the right margin.
- **First-Line Indent:** Moves only the first line of a paragraph inward.
- **Hanging Indent:** Moves all lines except the first line inward.

Indentation is different from paragraph alignment. Alignment controls how text is positioned within the available space, while indentation changes the boundaries of that space.

Adjusting Paragraph Indentation

You can adjust paragraph indentation using commands on the Microsoft Word Ribbon.

Using the Home Tab

Follow these steps to increase or decrease paragraph indentation:

1. Open your document in Microsoft Word.
2. Place the insertion point anywhere within the paragraph you want to format.
3. Click the **Home** tab.
4. Locate the **Paragraph** group.
5. Select **Increase Indent** to move the paragraph farther from the left margin.
6. Select **Decrease Indent** to move the paragraph closer to the left margin.

Using the Layout Tab

For more precise indentation settings:

1. Select the paragraph you want to format.
2. Click the **Layout** tab.
3. Locate the **Paragraph** group.
4. Enter a measurement in the **Left** or **Right** indentation field.
5. Press **Enter** to apply the change.

Indentation is commonly measured in inches, while paragraph spacing before and after paragraphs is commonly measured in points.

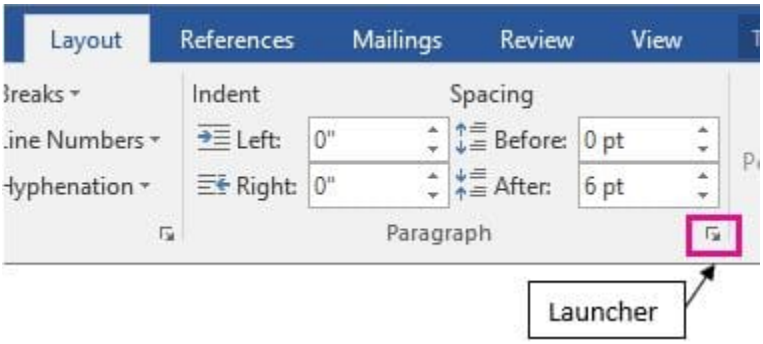


Figure 1. Paragraph Indentation and Spacing Controls in Microsoft Word.

Creating a First-Line Indent

A **first-line indent** moves only the first line of a paragraph inward while the remaining lines stay aligned with the left margin.

First-line indents are sometimes used in business letters, essays, and reports.

For example, a semi-block business letter commonly uses first-line indentation for body paragraphs.

Using the Paragraph Dialog Box

To create a first-line indent:

1. Select the paragraph you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Click the small **Dialog Box Launcher** arrow in the lower-right corner.
5. Under **Indentation**, locate the **Special** drop-down menu.
6. Select **First line**.
7. Enter **0.5 inches** in the By field.
8. Click **OK**.

Using the Ruler to Adjust Indentation

Microsoft Word includes a ruler that allows you to adjust indentation by dragging markers.

To display the ruler, click the **View** tab and select **Ruler**.

The ruler includes several indentation markers:

- **First-Line Indent Marker:** Controls the position of the first line of a paragraph.
- **Hanging Indent Marker:** Controls the position of the remaining lines.
- **Left Indent Marker:** Moves the paragraph's left indentation markers together.
- **Right Indent Marker:** Controls the right boundary of the paragraph.

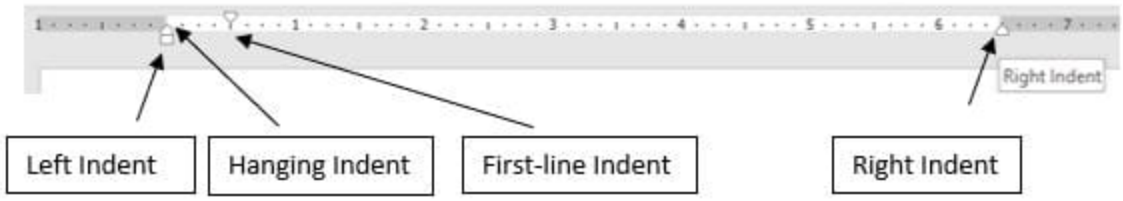


Figure 2. Indentation Markers on the Microsoft Word Ruler.

Adjusting a First-Line Indent with the Ruler

1. Place the insertion point within the paragraph.
2. Make sure the ruler is visible.
3. Locate the upper triangular marker on the left side of the ruler.
4. Drag the marker to the desired position, such as **0.5 inches**.
5. Release the mouse to apply the indentation.

Creating a Hanging Indent

A **hanging indent** keeps the first line of a paragraph at its original position while moving the remaining lines inward.

Hanging indents are commonly used in reference lists and bibliographies.

To create a hanging indent:

1. Select the paragraph or reference entry.
2. Open the **Paragraph** dialog box from the Home tab.
3. Under **Indentation**, locate the Special menu.
4. Select **Hanging**.
5. Enter **0.5 inches** in the By field.
6. Click **OK**.

You can also create a hanging indent using the lower triangular marker on the ruler.

Applying Left and Right Indents

Left and right indents can be used together to make a paragraph narrower than the rest of the document.

For example, some writing styles require long quotations to be set apart from the main text using indentation.

To apply both left and right indentation:

1. Select the paragraph you want to format.
2. Click the **Layout** tab.
3. Locate the Paragraph group.
4. Enter the desired measurements in the **Left** and **Right** fields.
5. Review the paragraph to confirm the formatting is appropriate.

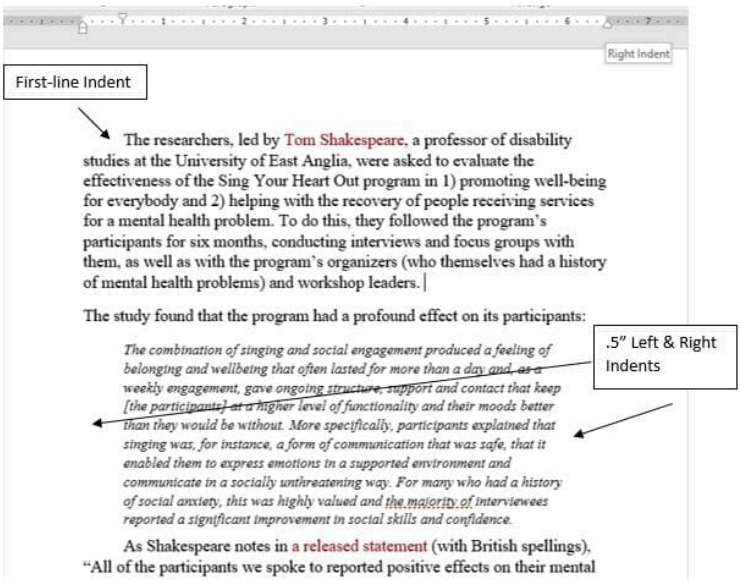


Figure 3. Example of Left and Right Paragraph Indentation.

Practice: Indenting Paragraphs in Microsoft Word

Purpose: Practice applying different paragraph indentation styles in a professional document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the heading **Professional Business Communication**.
3. Write three short paragraphs explaining why communication is important in the workplace.
4. Select the first paragraph and apply a **0.5-inch first-line indent**.
5. Select the second paragraph and apply a **0.5-inch hanging indent**.
6. Select the third paragraph and apply a **0.5-inch left indent** and a **0.5-inch right indent**.
7. Display the ruler and review the indentation markers for each paragraph.
8. Experiment with the Increase Indent and Decrease Indent commands.
9. Save the document as **Paragraph_Indentation_Practice.docx**.

Key Takeaways

- Paragraph indentation changes the position of text relative to page margins.
- Left and right indents adjust the boundaries of a paragraph.
- First-line indents move only the first line inward.
- Hanging indents move all lines except the first line inward.
- Indentation can be adjusted using the Home tab, Layout tab, ruler, or Paragraph dialog box.
- Consistent indentation helps create organized and professional documents.

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3.4: Setting Tabs and Tab Stops

Learning Objectives

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

- **Explain** the purpose of tabs and tab stops in Microsoft Word.
- **Identify** different types of tab stops and their functions.
- **Create** and adjust tab stops using the ruler and Tabs dialog box.
- **Apply** tab leaders to organize information.
- **Use** tab stops to align text and numerical information in professional documents.

Understanding Tabs and Tab Stops

Tabs allow users to align text at specific horizontal positions in a Microsoft Word document.

A **tab stop** is a position on the horizontal ruler where the insertion point moves when you press the Tab key.

Tab stops are useful for organizing information into aligned columns, such as price lists, schedules, and simple business documents.



Figure 1. Tab Key on a Computer Keyboard.

By default, Word typically places tab stops at half-inch intervals. These default stops are not displayed as markers on the ruler.

When you create a custom tab stop, Word uses that position for the selected paragraph and replaces default stops to its left.

Tab stops are part of paragraph formatting. When you press Enter to create another paragraph, Word generally carries the same tab settings into the new paragraph.

Types of Tab Stops

Microsoft Word provides several types of tab stops for aligning text.

- **Left Tab:** Aligns text so that it begins at the tab stop and extends to the right.
- **Center Tab:** Centers text around the tab stop.
- **Right Tab:** Aligns text so that it ends at the tab stop.
- **Decimal Tab:** Aligns numbers according to their decimal points.
- **Bar Tab:** Inserts a vertical line at the selected position rather than moving text.

Tab stop icon	How to Use
Left tab	Text is aligned to the right of this tab stop.
Center Tab	Centers the text equidistant over the tab stop.
Right Tab	Text is right aligned and extends to the left.
Decimal Tab	Numbers are aligned to the left of the decimal.

Figure 2. Types of Tab Stop Markers in Microsoft Word.

Using Tab Stops to Align Text

Different tab stops allow you to organize information in a consistent layout.

For example, you might use:

- A left tab for product names.
- A center tab for product categories.
- A right tab for dates or identification numbers.
- A decimal tab for prices.



Name	Country	Color	Year	Type	Price
Tahbilk	Australia	Red	2013	Cabernet Sauvignon	$18.99
Ritual	Chile	Red	2015	Pinot Noir	$18.99
Simonnet Febvre	France	White	2015	Chablis	$22.99
Borgo Scopeto	Italy	Red	2014	Chianti	$15.99
Los Dos	Spain	Pink	2017	Rosé	$7.99
Tokara	South Africa	White	2016	Sauvignon Blanc	$19.99
Saint M	Germany	White	2016	Riesling	$14.99
Ramspeck	USA	Red	2013	Merlot	$16.99

Figure 3. Example of Text Aligned Using Different Tab Stops.

Creating Tab Stops with the Ruler

You can create custom tab stops directly on the horizontal ruler.

To display the ruler, click the **View** tab and select **Ruler**.

How to Insert a Tab Stop

1. Open your document in Microsoft Word.
2. Select the paragraph or paragraphs where you want to use tab stops.
3. Make sure the horizontal ruler is visible.
4. Locate the **Tab Selector** at the far-left end of the ruler.
5. Click the Tab Selector until the desired tab stop type appears.
6. Click the ruler at the position where you want the tab stop.
7. Press the **Tab** key within the paragraph to move text to the tab stop.

Figure 4. Tab Selector in Microsoft Word.

Moving or Removing Tab Stops

To move an existing tab stop, drag its marker to a different position on the ruler.

To remove a tab stop, drag its marker downward off the ruler and release the mouse.

Word will adjust the text based on the remaining tab stops.

Using the Tabs Dialog Box

The **Tabs dialog box** provides more precise control over tab stop positions, alignment, and leaders.

To open the Tabs dialog box:

1. Click the **Home** tab.
2. Locate the **Paragraph** group.
3. Click the small **Dialog Box Launcher** arrow.
4. Select the **Tabs** button near the bottom of the Paragraph dialog box.

You can also open the Tabs dialog box by double-clicking an existing tab stop marker on the ruler.

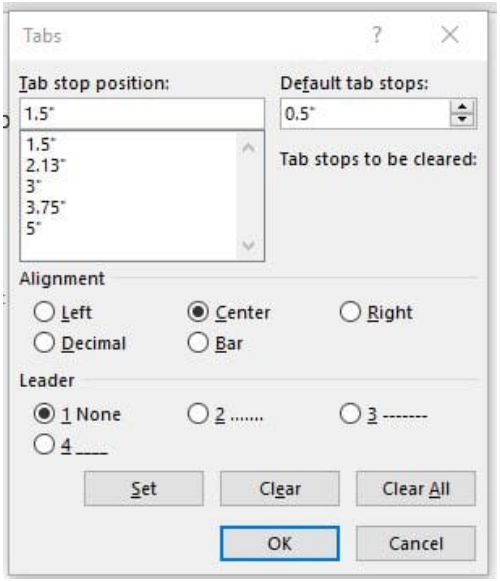


Figure 5. Tabs Dialog Box in Microsoft Word.

Creating a Custom Tab Stop

1. Open the **Tabs** dialog box.
2. Enter a measurement in the **Tab stop position** field.
3. Select the desired alignment, such as Left, Center, Right, or Decimal.
4. Choose a leader style if needed.
5. Click **Set**.
6. Click **OK** to apply the settings.

Understanding Tab Leaders

A **tab leader** is a repeated character that fills the space between text and a tab stop.

Tab leaders help readers connect related information across a line.

For example, a restaurant menu might use dotted leaders to connect an item with its price:

Sandwich $8.99

Salad $7.49

Soup $5.99

These examples illustrate the appearance of dotted leaders. In Word, use the Tabs dialog box to create actual leaders rather than typing periods manually.

Practice 3: Wine Prices – Part 1

Purpose: Practice using tab stops, tab leaders, paragraph spacing, and formatting tools to organize a wine price list.

Required File: Wines unformatted.docx

Instructions:

1. Open the data file **Wines unformatted.docx** from your course files.
2. Insert two blank paragraphs at the beginning of the document.
3. Select the text **Name** in the first paragraph. Apply the following formatting:
   - Font: Arial
   - Font Size: 12 pt
   - Font Style: Bold
   - Font Color: Red
4. Use **Format Painter** to apply the same formatting from Name to the headings Country, Color, Year, Type, and Price.

   Tip: Double-click Format Painter to apply the formatting to multiple headings. Press Esc when finished.

5. Select the text beginning with **Name** and continuing through **$16.99**.
6. Open the Paragraph dialog box and select the **Tabs** button.
7. Set the following five custom tab stops:
   1. **Center:** 1.5 inches
   2. **Left:** 2.15 inches
   3. **Right:** 3 inches
   4. **Center:** 3.75 inches
   5. **Decimal:** 6 inches, with a dotted leader

   Enter each position, select its alignment, and click Set. For the decimal tab, select the dotted leader before clicking Set. Click OK after creating all five tab stops.

8. Review the alignment of the data. If the Country and Color columns do not align correctly, click the **Show/Hide** button on the Home tab to display formatting marks.
9. Locate the two tab characters between Country and Color and remove one of them.
10. Select the same block of text used when setting the tab stops.
11. Click the **Layout** tab and change the paragraph spacing **After** to **0 pt**.
12. At the top of the document, type the title **Wine Prices**.
13. Center-align the title and apply the following formatting:
    - Font Size: 36 pt
    - Font Style: Bold
14. Save the document with the new filename **Tab formatted Wine Prices.docx**.

Expected Result

Your completed document should have a centered title, formatted column headings, aligned wine information, and prices organized using a decimal tab stop and dotted leader.



Wine Prices

Name	Country	Color	Year	Type	Price
Tahbilk	Australia	Red	2013	Cabernet Sauvignon	$18.99
Ritual	Chile	Red	2015	Pinot Noir	$18.99
Simonnet Febvre	France	White	2015	Chablis	$22.99
Borgo Scopeto	Italy	Red	2014	Chianti	$15.99
Los Dos	Spain	Pink	2017	Rosé	$7.99
Tokara	South Africa	White	2016	Sauvignon Blanc	$19.99
Saint M	Germany	White	2016	Riesling	$14.99
Ramspeck	USA	Red	2013	Merlot	$16.99

Figure 6. Example of the Completed Wine Prices Practice Activity.

Key Takeaways

- Tabs help align text at specific horizontal positions.
- Tab stops can be set using the ruler or Tabs dialog box.
- Left, center, right, decimal, and bar tab stops serve different purposes.
- Tab leaders help connect related information across a line.
- Custom tab stops can improve the organization of price lists, schedules, and other professional documents.

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3.5: Formatting Document Layout in Microsoft Word

Learning Objectives

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

- **Adjust** page margins, orientation, and paper size in Microsoft Word.
- **Apply** line spacing and column formatting to improve document layout.
- **Create** section breaks to apply different formatting within one document.
- **Modify** page numbering and orientation for individual document sections.
- **Apply** professional page layout settings to a business report.

Understanding Document Layout

Document layout refers to how text and other content are arranged on a page. Microsoft Word provides tools for adjusting margins, orientation, paper size, spacing, columns, and sections.

These features are important when creating professional documents such as business reports, letters, newsletters, and manuals.

For example, imagine you are preparing a market trends report for WorldCorp. Different departments, including marketing, finance, and research and development, may contribute information. A consistent page layout helps employees and managers read and navigate the completed report.

Most page layout tools are available on the **Layout** tab.

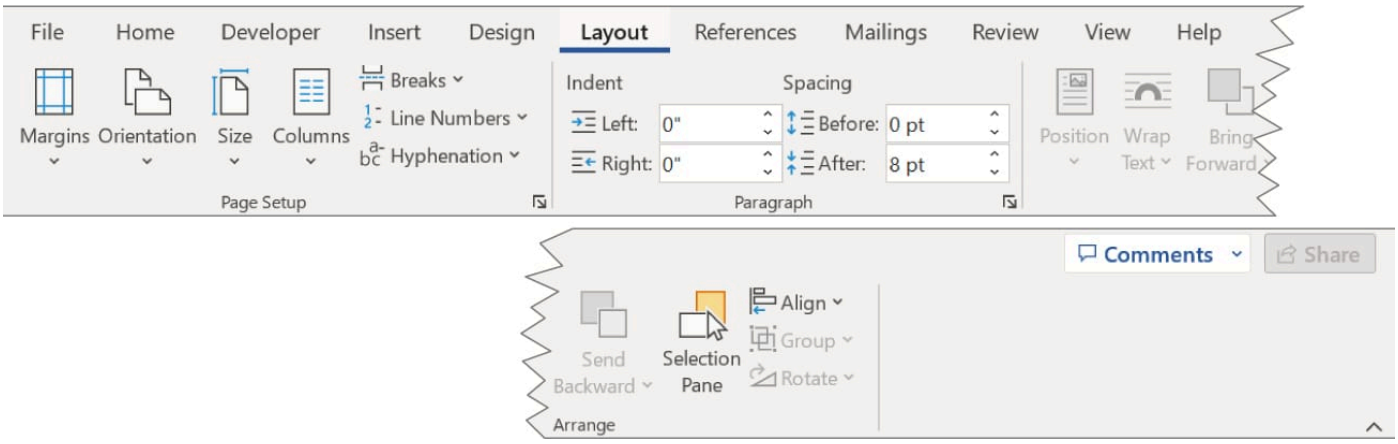


Figure 1. Layout Tab and Page Formatting Commands. Used with permission from Microsoft.

Understanding Page Setup

The **Page Setup** group on the Layout tab allows you to control the appearance and arrangement of a document.

Common page setup options include:

- **Margins:** Control the blank space around the page.
- **Orientation:** Determine whether the page is vertical or horizontal.
- **Size:** Set the paper dimensions.
- **Columns:** Divide text into vertical sections.
- **Breaks:** Separate pages or sections within a document.

For many business reports, one-inch margins, readable body text, and consistent spacing are appropriate starting points. However, formatting requirements may vary by organization or assignment.

Real-World Application: Style Guides

A **style guide** establishes formatting and writing standards for a document.

Examples include APA, MLA, Chicago, and industry-specific style guides. These may provide rules for margins, fonts, headings, citations, and line spacing.

Before preparing a professional or academic document, check whether your instructor, employer, or organization requires a particular style.

Microsoft Word includes formatting tools that can help you follow these requirements, but you should always review the finished document for accuracy and consistency.

Adjusting Page Margins

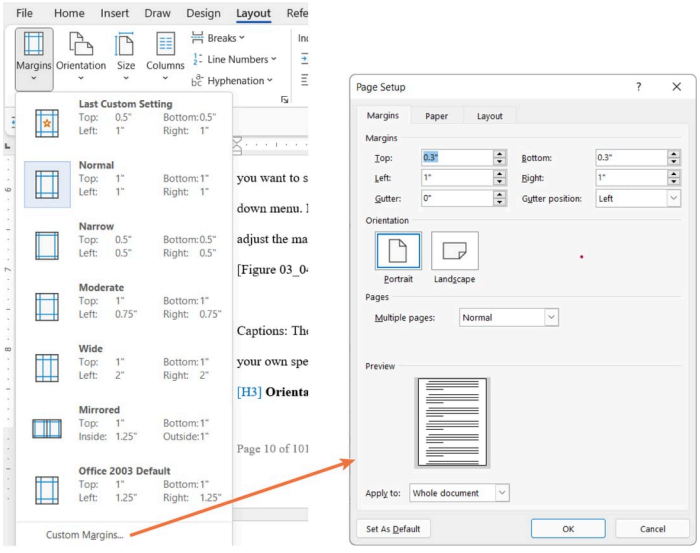
Margins are the blank spaces between the edges of the page and the document content.

Margins improve readability and provide space for printing, binding, and notes.

How to Change Page Margins

1. Open your document in Microsoft Word.
2. Click the **Layout** tab.
3. Locate the **Page Setup** group.
4. Select **Margins**.
5. Choose a preset margin option, such as **Normal**.
6. To enter specific measurements, select **Custom Margins**.
7. Enter the desired top, bottom, left, and right measurements.
8. Click **OK**.

The Normal preset commonly uses one-inch margins on all four sides.



(a) (b)

Figure 2. Preset and Custom Margin Settings. Used with permission from Microsoft.

Changing Page Orientation

Page orientation determines whether a page is displayed vertically or horizontally.

- **Portrait:** A vertical page layout commonly used for letters and reports.
- **Landscape:** A horizontal page layout useful for wide tables, charts, and graphics.

How to Change Page Orientation

1. Click the **Layout** tab.
2. Select **Orientation** from the Page Setup group.
3. Choose **Portrait** or **Landscape**.

To use different orientations within one document, you can divide the document into sections.

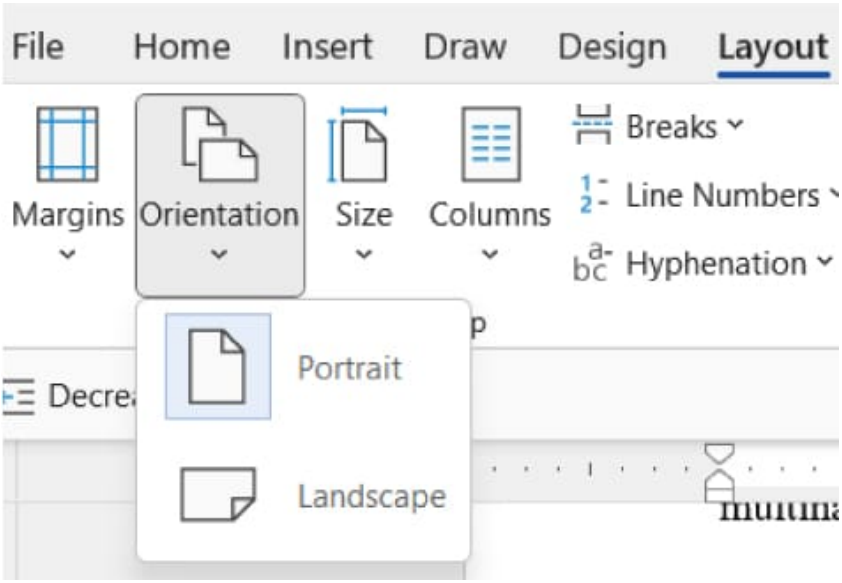


Figure 3. Portrait and Landscape Orientation Options. Used with permission from Microsoft.

Adjusting Line Spacing

Line spacing determines the vertical distance between lines of text within a paragraph.

Common spacing options include:

- **Single spacing (1.0):** Places lines relatively close together.
- **1.5 spacing:** Provides additional space between lines.
- **Double spacing (2.0):** Provides more space and is often required for academic assignments.

The default line spacing depends on the Word version, document template, and paragraph style.

How to Change Line Spacing

1. Select the paragraph or paragraphs you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Line and Paragraph Spacing**.
5. Choose the desired spacing.
6. For additional settings, select **Line Spacing Options**.

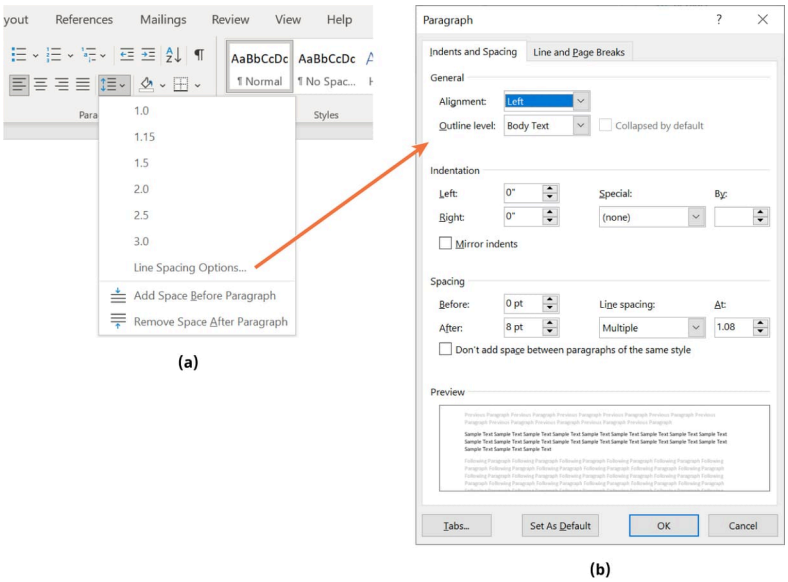


Figure 4. Line and Paragraph Spacing Options. Used with permission from Microsoft.

Use consistent line spacing throughout a document unless a particular section requires different formatting.

Changing Paper Size

Paper size determines the dimensions of the page.

Common paper sizes include:

- **Letter:** 8.5 × 11 inches, commonly used in the United States.
- **Legal:** 8.5 × 14 inches.
- **A4:** Approximately 8.27 × 11.69 inches, widely used internationally.

How to Change Paper Size

1. Click the **Layout** tab.
2. Select **Size** from the Page Setup group.
3. Choose the appropriate paper size.
4. For a custom size, select the available additional paper-size or Page Setup options.

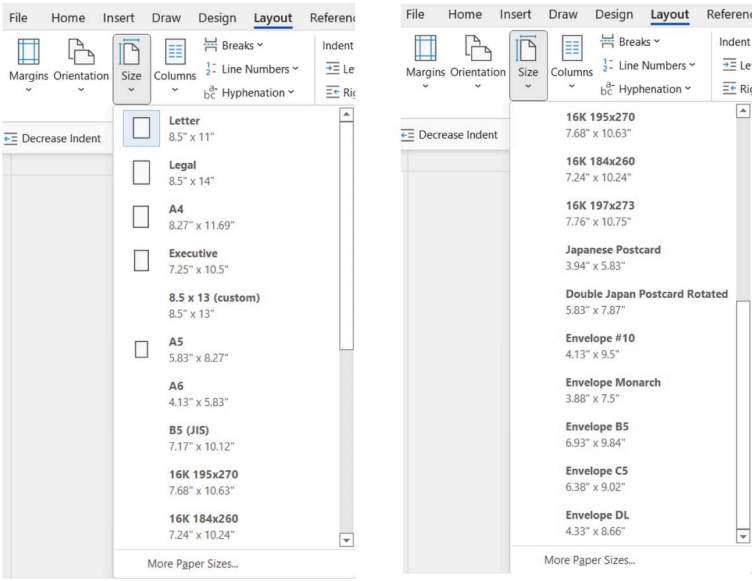


Figure 5. Paper Size Options in Microsoft Word. Used with permission from Microsoft.

Creating Columns

Columns divide text into multiple vertical sections on a page.

Columns are commonly used in newsletters, brochures, newspapers, and other publications.

How to Create Columns

1. Select the text you want to format into columns.
2. Click the **Layout** tab.
3. Select **Columns**.
4. Choose an option such as **One**, **Two**, or **Three**.
5. To customize column widths and spacing, select **More Columns**.

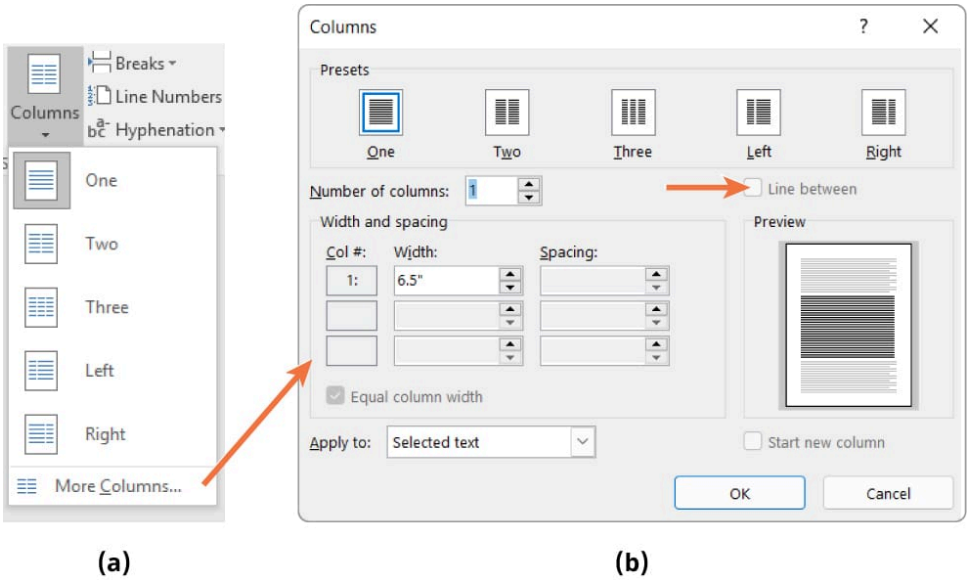


Figure 6. Creating and Customizing Columns. Used with permission from Microsoft.

Working with Section Breaks

A **section break** divides a Word document into sections that can use different formatting settings.

Section breaks are useful when you want to:

- Change page orientation for part of a document.
- Use different page numbering formats.
- Apply different margins to selected sections.
- Use different headers and footers.
- Organize long reports with front matter, body text, and appendices.

Types of Section Breaks

Microsoft Word provides several section break options:

- **Next Page:** Starts a new section on the following page.
- **Continuous:** Starts a new section on the same page.
- **Even Page:** Starts a new section on the next even-numbered page.
- **Odd Page:** Starts a new section on the next odd-numbered page.

How to Insert a Section Break

1. Place the insertion point where you want the new section to begin.
2. Click the **Layout** tab.
3. Select **Breaks**.
4. Under Section Breaks, choose **Next Page** or another appropriate option.

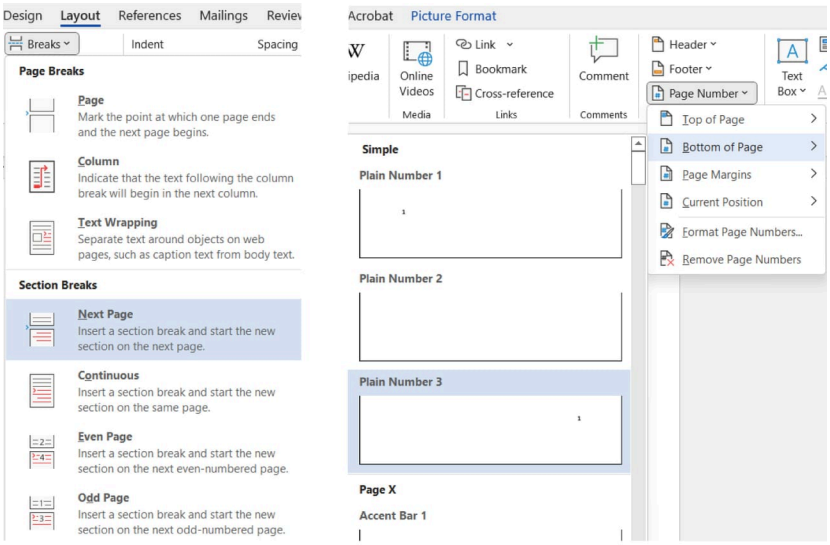
Using Section Breaks for Page Numbering

Section breaks allow different parts of a document to use different page numbering formats.

For example, a business report might have a title page without a page number and a main report that begins with page 1.

How to Restart Page Numbering

1. Insert a **Next Page** section break before the main report.
2. Double-click the header or footer in the new section.
3. Turn off **Link to Previous** if the new section should use different header or footer settings.
4. Select **Page Number** and insert the desired page number format.
5. Select **Page Number > Format Page Numbers**.
6. Under Page numbering, choose **Start at** and enter **1**.
7. Click **OK**.



(a) (b)

Figure 7. Section Break and Page Numbering Commands. Used with permission from Microsoft.

Using Different Page Orientations in One Document

Section breaks also allow you to combine portrait and landscape pages in the same document.

For example, a business report might use portrait pages for written information and landscape pages for wide charts or financial tables.

How to Change the Orientation of One Section

1. Place the insertion point before the content that needs a different orientation.
2. Insert a **Next Page** section break.
3. Place the insertion point after that content and insert another section break if the following pages should return to the original orientation.
4. Click anywhere inside the section you want to change.
5. Open **Layout > Page Setup** using the dialog box launcher.
6. Select **Landscape** or **Portrait** under Orientation.
7. Choose **This section** from the Apply to menu.
8. Click **OK**.

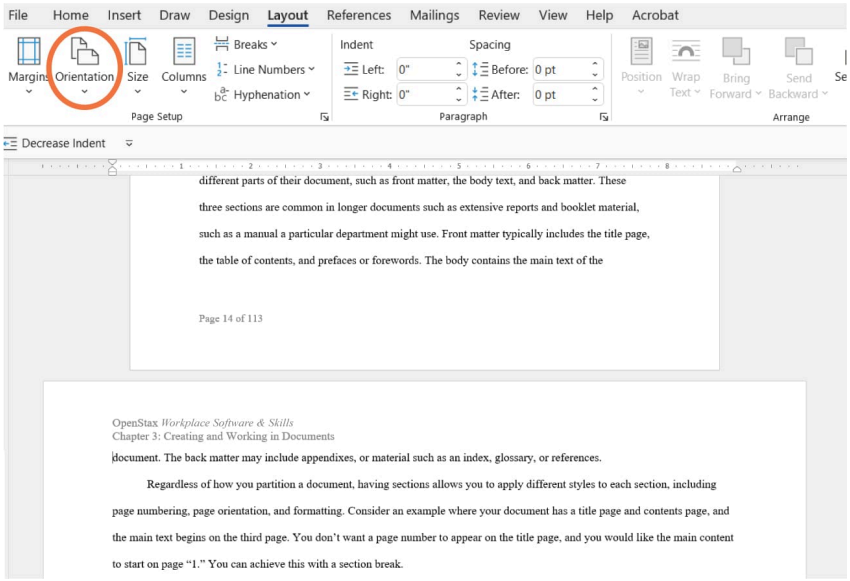


Figure 8. Using Different Page Orientations in One Document. Used with permission from Microsoft.

Video Tutorial: Microsoft Word Document Layout

Watch the following Microsoft Word tutorial for additional guidance. You can also open the video directly using the link below.

Watch the Microsoft Word tutorial on YouTube.

Practice: Formatting a Business Report

Purpose: Practice using Microsoft Word's page layout tools to create a professional business document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **Business Market Trends Report**.
3. Write two short paragraphs about a business or industry of your choice.
4. Set the page margins to **1 inch** on all sides.
5. Set the paper size to **Letter (8.5 × 11 inches)**.
6. Apply **1.5 line spacing** to the body paragraphs.
7. Insert a **Next Page** section break.
8. On the new page, insert a short list of business trends.
9. Format the list into **two columns**.
10. Insert another section break and create a new page.
11. Change the orientation of the final section to **Landscape**.
12. Insert page numbers into the document.
13. Review the document to confirm the formatting is consistent.
14. Save the document as **Business_Document_Layout_Practice.docx**.

Key Takeaways

- The Layout tab contains tools for adjusting margins, orientation, paper size, and columns.
- Margins control the blank space around the page.
- Portrait and landscape orientations are used for different types of content.
- Line spacing controls the distance between lines of text.
- Columns help organize text into vertical sections.
- Section breaks allow different formatting within the same document.

- Consistent page layout improves document readability and professionalism.

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3.6: Formatting Document Content in Microsoft Word

Learning Objectives

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

- **Format** font types, sizes, and styles in Microsoft Word.
- **Adjust** paragraph spacing, indentation, and alignment.
- **Apply** heading styles to organize a document.
- **Use** text wrapping to position graphics within a document.
- **Create** professionally formatted business documents.

Understanding Document Content Formatting

Document content formatting refers to the appearance and organization of text, paragraphs, headings, and graphics in Microsoft Word.

Formatting helps readers understand information and gives a document a professional appearance.

For example, imagine you are preparing a market trends report for WorldCorp. Employees and managers from different departments will read your report. Using consistent fonts, headings, spacing, and graphics will make the information easier to understand.

Formatting Fonts

Microsoft Word provides several tools for changing the appearance of text.

Common font formatting options include:

- **Font Type:** Determines the appearance of letters and characters.
- **Font Size:** Controls how large or small the text appears.
- **Font Style:** Includes bold, italic, and underline formatting.
- **Font Color:** Changes the color of selected text.
- **Text Effects:** Includes options such as superscript and subscript.

Understanding Font Types

Fonts are commonly divided into two categories:

- **Serif Fonts:** Include small decorative strokes at the ends of letters. Examples include Times New Roman, Cambria, and Garamond.
- **Sans Serif Fonts:** Do not include these decorative strokes. Examples include Arial, Calibri, and Tahoma.

Both types can be appropriate for professional documents. Choose fonts that are readable and consistent with the purpose of your document.

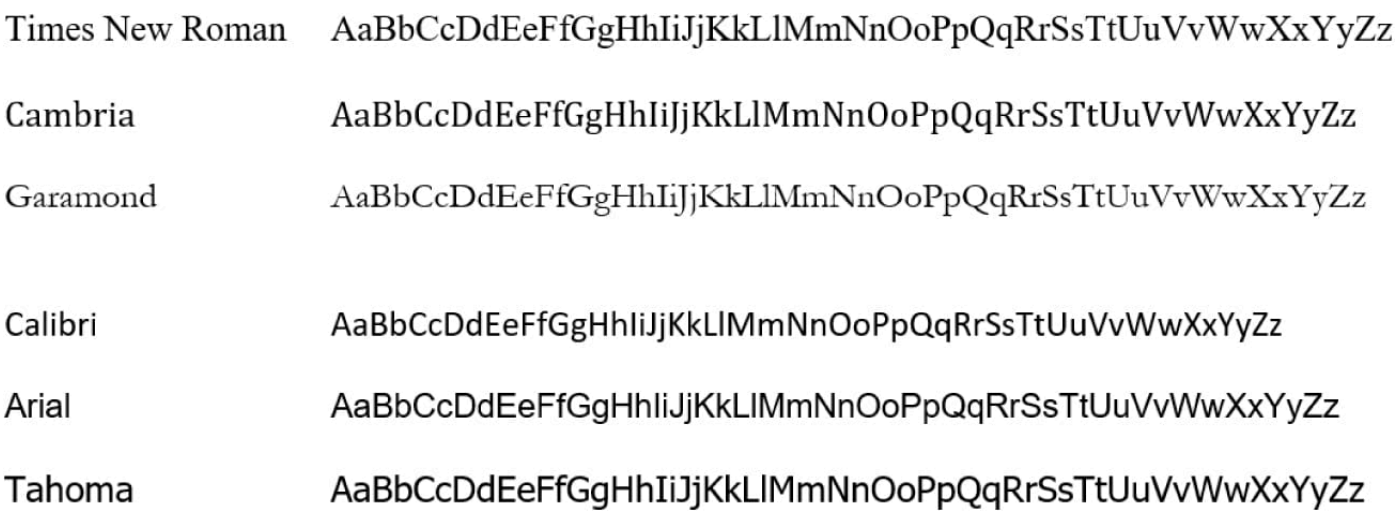


Figure 1. Examples of Serif and Sans Serif Fonts. Used with permission from Microsoft.

Accessibility Tip

Choose simple, readable fonts for body text. Avoid using decorative or script fonts for long paragraphs because they can be difficult to read.

Microsoft Word's default font depends on the version and template. For example, newer Microsoft 365 versions commonly use Aptos, while older versions may use Calibri.

Changing the Font Type

1. Select the text you want to format.
2. Click the **Home** tab.
3. Locate the **Font** group.
4. Open the Font drop-down menu.
5. Select the font you want to use.

Changing the Font Size

Font size is measured in points. Many business documents use body text between 10 and 12 points, depending on the font and formatting requirements.

1. Select the text you want to change.
2. Click the **Home** tab.
3. Locate the **Font Size** box.
4. Choose or enter the desired font size.
5. Press **Enter** to apply the change.

Applying Font Styles

Font styles can help emphasize important information.

- **Bold:** Makes text appear darker and thicker.
- **Italic:** Slants text for emphasis.
- **Underline:** Places a line beneath text.

To apply a font style, select the text and choose the appropriate command from the Font group on the Home tab.

You can also open the Font dialog box for additional formatting options.

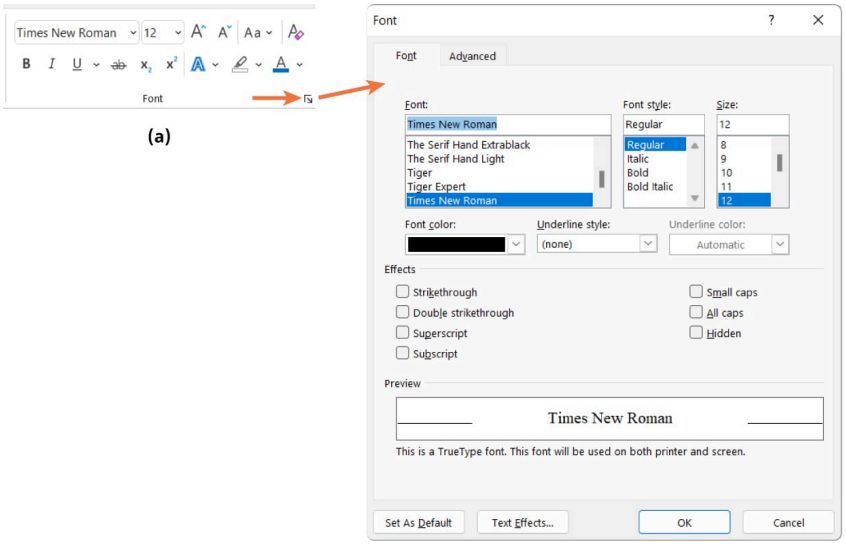


Figure 2. Font Formatting Commands and Dialog Box. Used with permission from Microsoft.

Mac Tip

Some fonts available in Windows may not be installed on a Mac, and vice versa. If you share documents between computers, use commonly available fonts or check how the document appears on the other device.

Formatting Paragraphs

Paragraph formatting controls how text is arranged within and between paragraphs.

Common paragraph formatting options include:

- Line spacing
- Paragraph spacing
- Indentation
- Alignment

Adjusting Line Spacing

Line spacing determines the vertical distance between lines of text within a paragraph.

Common options include single spacing, 1.5 spacing, and double spacing.

To change line spacing:

1. Select the paragraph or paragraphs.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Line and Paragraph Spacing**.
5. Choose the desired spacing option.

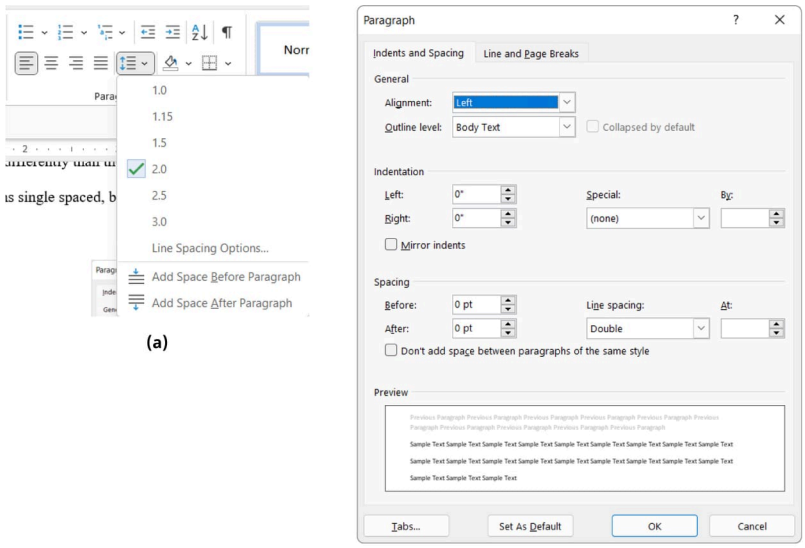


Figure 3. Adjusting Line and Paragraph Spacing. Used with permission from Microsoft.

Understanding Paragraph Spacing and Indentation

Paragraph spacing adds space before or after a paragraph.

Indentation moves text inward from the page margins.

Both can help separate paragraphs and improve readability.

For example, a report may use:

- First-line indentation to identify the beginning of a paragraph.
- Spacing after paragraphs to create a visual separation.

Choose a consistent method that follows the document's formatting requirements.

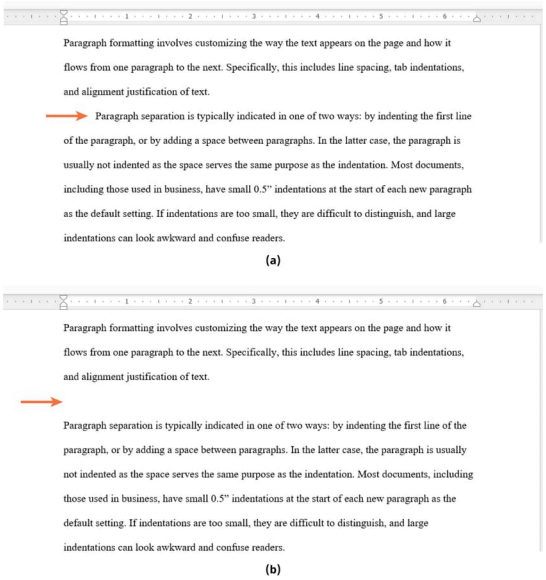


Figure 4. Comparing Paragraph Indentation and Paragraph Spacing. Used with permission from Microsoft.

Changing Paragraph Alignment

Paragraph alignment determines how text is positioned between the left and right margins.

Microsoft Word provides four alignment options:

- **Align Left:** Text aligns with the left margin.
- **Center:** Text is centered between the margins.
- **Align Right:** Text aligns with the right margin.
- **Justify:** Text aligns with both margins by adjusting spacing between words.

Left alignment is commonly used for business reports and letters. Justified alignment is sometimes used in publications, but it can create uneven spacing between words.

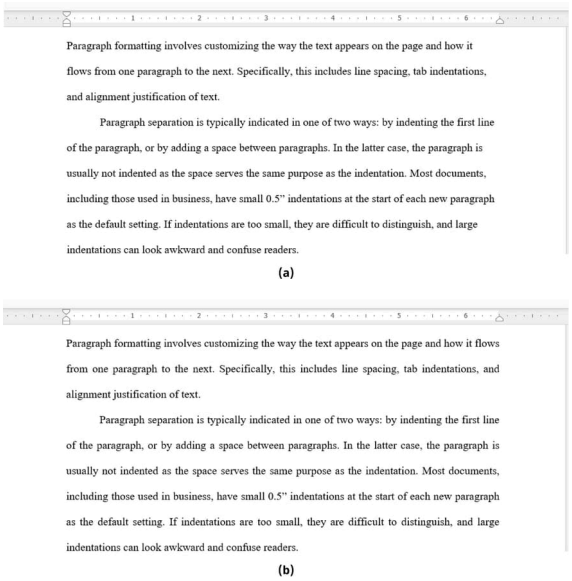


Figure 5. Left Alignment Compared with Justified Alignment. Used with permission from Microsoft.

Using Heading Styles

Headings divide a document into organized sections and help readers locate information.

Microsoft Word includes built-in heading styles that create a clear hierarchy.

- **Heading 1:** Used for major sections.
- **Heading 2:** Used for subsections within a major section.
- **Heading 3:** Used for smaller sections within a subsection.

Using built-in heading styles also allows Word to create a document outline and generate a table of contents.

How to Apply Heading Styles

1. Open your document in Microsoft Word.
2. Select the text you want to use as a heading.
3. Click the **Home** tab.
4. Locate the **Styles** group.
5. Select **Heading 1**, **Heading 2**, or another appropriate heading level.
6. Repeat for the remaining document headings.

For example, a market trends report might include these major headings:

- Introduction and Executive Summary
- Industry and Market Analysis
- Competition
- SWOT Analysis
- Recommendations and Key Findings
- Conclusion

Using the Navigation Pane

The **Navigation Pane** allows you to move between sections of a document using its headings.

1. Click the **View** tab.
2. Select **Navigation Pane**.
3. Choose the **Headings** view.
4. Click a heading to move to that section of the document.

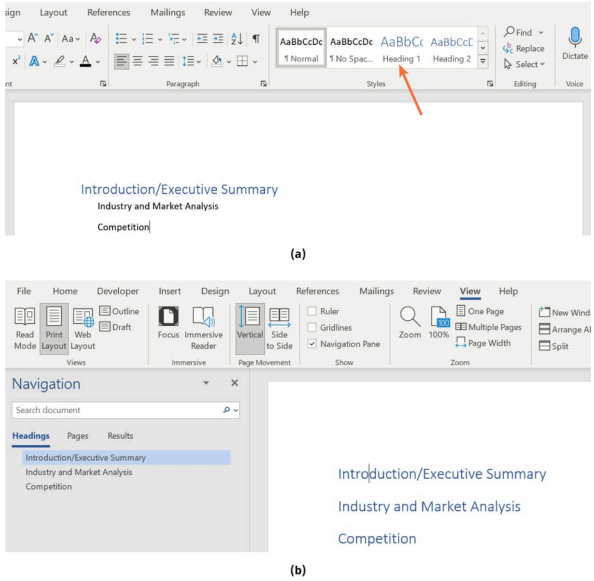


Figure 6. Using Heading Styles and the Navigation Pane. Used with permission from Microsoft.

Accessibility Tip

Use Word's built-in heading styles rather than simply increasing the font size or making text bold.

Built-in heading styles help screen readers recognize the document structure and make navigation easier for all readers.

Adjusting Graphics and Text Layout

Graphics can help explain information and improve the appearance of a document.

When inserting an image, you can control how the surrounding text interacts with it using **Text Wrapping**.

Understanding Text Wrapping Options

Common text wrapping options include:

- **In Line with Text:** Treats the image like a character within a line of text.
- **Square:** Wraps text around the rectangular boundary of the image.

- **Tight:** Wraps text more closely around the image's shape.
- **Top and Bottom:** Places text above and below the image.
- **Behind Text:** Places the image behind the text.
- **In Front of Text:** Places the image over the text.

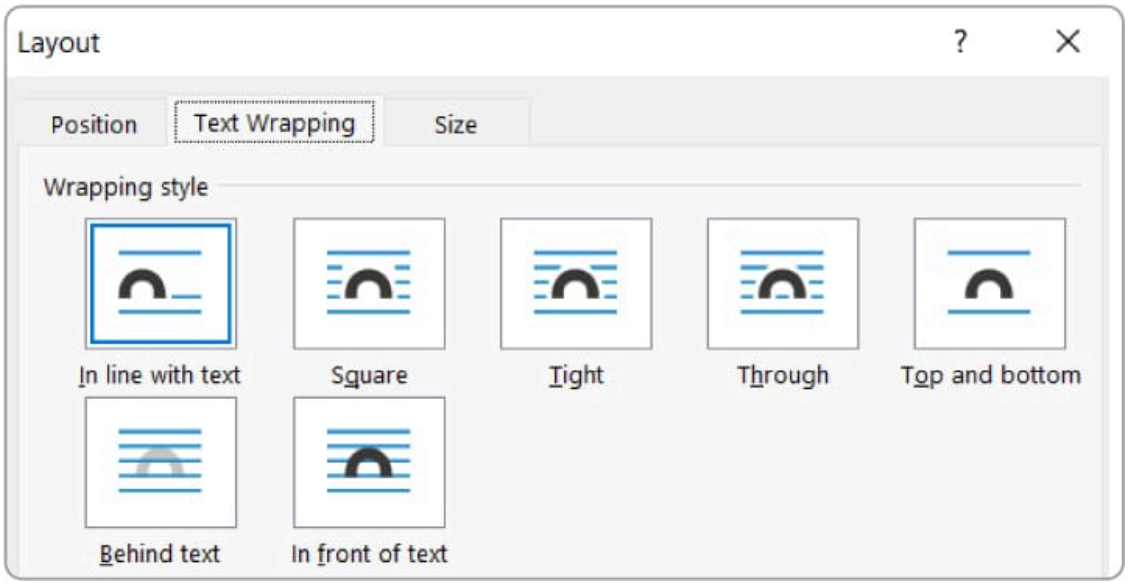


Figure 7. Text Wrapping Options in Microsoft Word. Used with permission from Microsoft.

Inserting an Image

For example, you may want to insert a picture of a laptop into a market trends report.

To insert an image:

1. Place the insertion point where you want the image.
2. Click the **Insert** tab.
3. Select **Pictures**.
4. Choose the image source and locate the image.
5. Insert the image into the document.

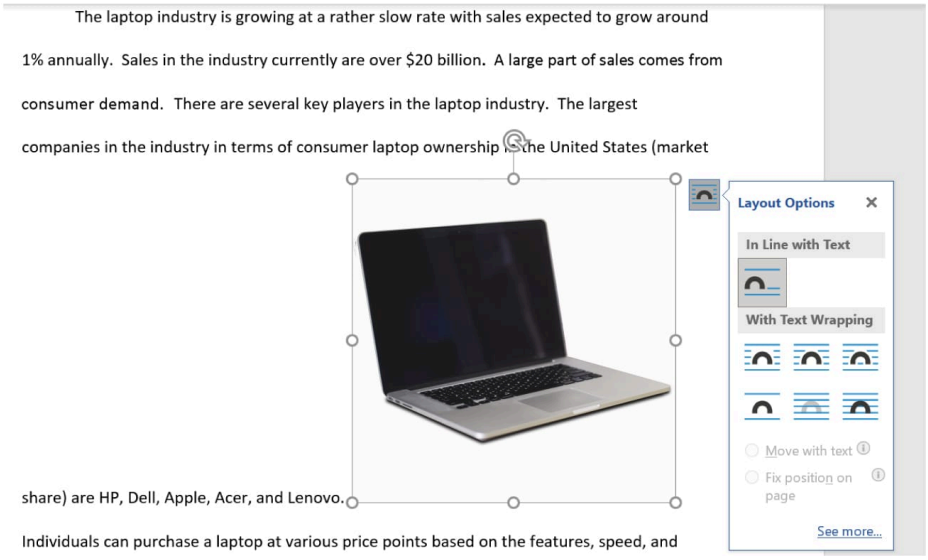


Figure 8. Inserting a Picture and Opening Layout Options. Used with permission from Microsoft.

Changing Text Wrapping

1. Click the image to select it.
2. Select the **Layout Options** button beside the image, or open **Wrap Text** on the Picture Format tab.
3. Choose a wrapping style such as **Square** or **Top and Bottom**.
4. Move the image to the desired location.
5. Review the document to ensure the image does not cover important text.

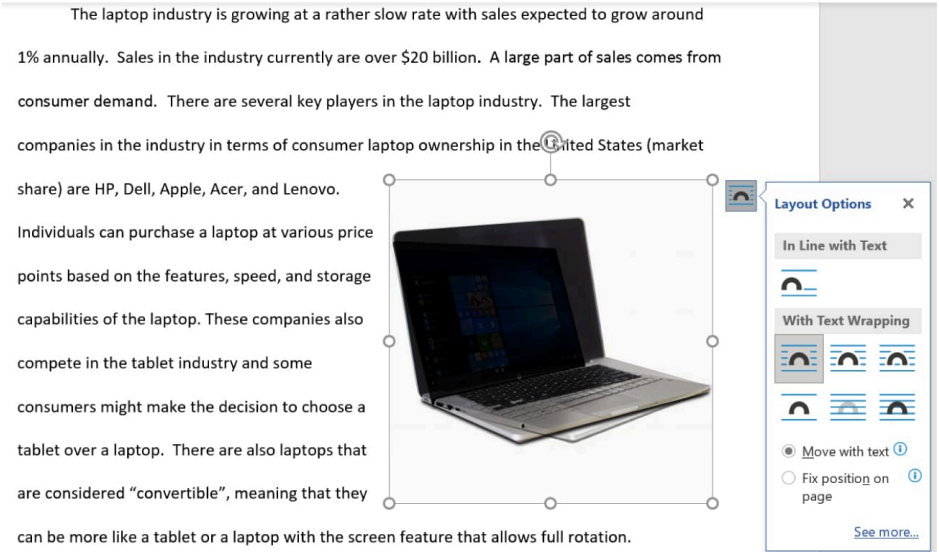


Figure 9. Positioning an Image with Square Text Wrapping. Used with permission from Microsoft.

Practice: Formatting a Business Report

Purpose: Practice formatting fonts, paragraphs, headings, and images in Microsoft Word.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **Business Market Trends Report**.
3. Apply a readable font, such as Arial or Aptos, to the document.
4. Format the title using a larger font size and bold text.
5. Write two short paragraphs about a business or industry of your choice.
6. Apply **1.5 line spacing** to the body paragraphs.
7. Set the body paragraphs to **Align Left**.
8. Create three section headings:
    - Introduction
    - Market Trends
    - Recommendations
9. Apply the built-in **Heading 1** style to each section heading.
10. Open the **Navigation Pane** and confirm the headings appear.
11. Insert an appropriate image related to your selected industry.
12. Apply **Square** or **Top and Bottom** text wrapping to the image.
13. Review the document for consistent formatting and readability.
14. Save the document as **Business_Content_Formatting_Practice.docx**.

Key Takeaways

- Font formatting controls the appearance of text.
- Paragraph formatting includes spacing, indentation, and alignment.

- Heading styles organize documents and support navigation.
- Text wrapping controls how images interact with surrounding text.
- Consistent formatting helps create readable, accessible, and professional documents.

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4: CHAPTER 4-FORMATTING DOCUMENTS

4.1: Document Design
4.2: Microsoft Word- Advanced Formatting Features

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4.1: Document Design

Learning Objectives

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

- **Explain** how document design improves readability and professionalism.
- **Apply** built-in styles and themes in Microsoft Word.
- **Customize** theme fonts and colors to create a consistent document appearance.
- **Identify** how templates can simplify document creation.
- **Insert** and customize watermarks in professional documents.
- **Evaluate** document formatting for consistency and readability.

Understanding Document Design

Document design refers to how fonts, colors, headings, spacing, and other visual elements work together to create a professional document.

Microsoft Word provides several tools to help users maintain a consistent appearance throughout a document.

These tools include:

- **Styles:** Apply predefined formatting to text and headings.
- **Themes:** Coordinate fonts, colors, and visual effects throughout a document.
- **Templates:** Provide predesigned document layouts.
- **Page Background:** Adds elements such as watermarks, page colors, and borders.

For example, imagine you are preparing a market trends report for WorldCorp. Your supervisor may want the report to use company colors, consistent headings, and a professional design.

Rather than formatting every heading individually, you can use Word's styles and themes to create a consistent appearance.

Using Document Templates

A **template** is a predesigned document that includes formatting and layout settings.

Microsoft Word provides templates for many types of documents, including:

- Business reports
- Résumés
- Professional letters
- Flyers and brochures
- Invitations
- Meeting agendas

How to Use a Template

1. Open Microsoft Word.
2. Select **File > New**.
3. Browse the available templates or search for a specific type of document.
4. Select a template that fits your purpose.
5. Choose **Create** to open it.
6. Replace the sample content with your own information.

7. Save the completed document with an appropriate filename.

Tip: Choose a template that is appropriate for your audience. A professional business report should use readable fonts, clear headings, and consistent formatting.

Understanding Styles in Microsoft Word

A **style** is a collection of formatting settings that can be applied to text.

Styles help organize a document and make it easier to change formatting consistently.

Common Word styles include:

- **Normal:** Commonly used for body paragraphs.
- **Title:** Used for the main document title.
- **Subtitle:** Used for supporting title information.
- **Heading 1:** Used for major document sections.
- **Heading 2:** Used for subsections.
- **Heading 3:** Used for smaller sections within a subsection.

Styles also help Word recognize the structure of a document. This makes features such as the Navigation Pane and automatic table of contents more useful.

How to Apply a Style

1. Open your document in Microsoft Word.
2. Select the text you want to format.
3. Click the **Home** tab.
4. Locate the **Styles** group.
5. Select a style, such as **Heading 1** or **Normal**.
6. Repeat for other sections of the document.

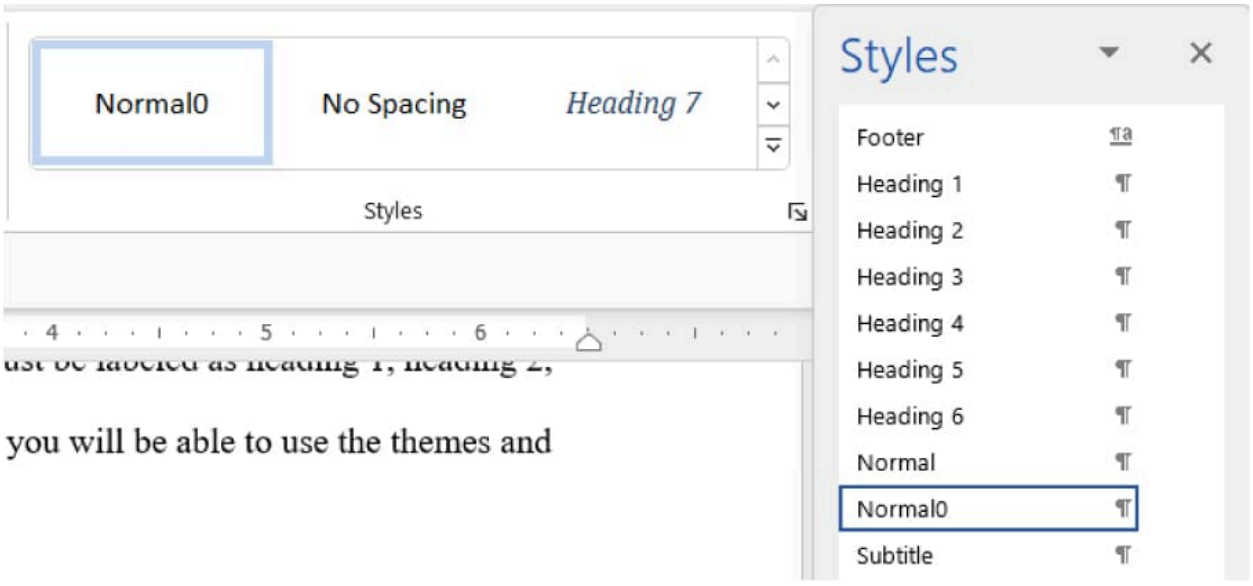


Figure 1. Applying Styles Using the Styles Pane. Used with permission from Microsoft.

Modifying an Existing Style

You can customize a style to change the formatting of all text that uses it.

1. Click the **Home** tab.
2. Locate the style you want to modify.
3. Right-click the style and select **Modify**.
4. Choose the desired font, size, color, and other formatting options.
5. Click **OK**.

For example, changing the Heading 1 style can update the appearance of all headings that use that style.

Applying Themes in Microsoft Word

A **theme** is a coordinated set of colors, fonts, and visual effects that helps create a consistent document design.

Themes are especially useful when preparing reports, proposals, and other professional documents.

Applying a theme can change the appearance of text and other elements that use theme-based formatting.

How to Apply a Theme

1. Open your document in Microsoft Word.
2. Click the **Design** tab.
3. Select **Themes**.
4. Browse the available theme options.
5. Choose a theme that fits the purpose of your document.
6. Review the document to see how the formatting changes.



Figure 2. Selecting a Document Theme in Microsoft Word. Used with permission from Microsoft.

Important Tip

Themes work best when a document uses built-in styles and theme-based formatting.

Text that has been manually formatted may not change when a new theme is applied.

Available themes and their names may vary depending on your version of Microsoft Word.

Customizing Theme Colors and Fonts

Microsoft Word allows you to customize the fonts and colors associated with a theme.

This is useful when a business or organization has specific branding requirements.

Changing Theme Colors

1. Click the **Design** tab.
2. Select **Colors**.
3. Choose a color palette that fits your document.
4. Review the document to see the updated colors.

For example, WorldCorp may want its market trends report to use a green color palette to match the company's branding.

Changing Theme Fonts

1. Click the **Design** tab.
2. Select **Fonts**.
3. Choose an available font combination.
4. To create your own combination, select **Customize Fonts**, if available.
5. Choose a heading font and a body font.
6. Enter a name for the customized font combination.
7. Click **Save**.

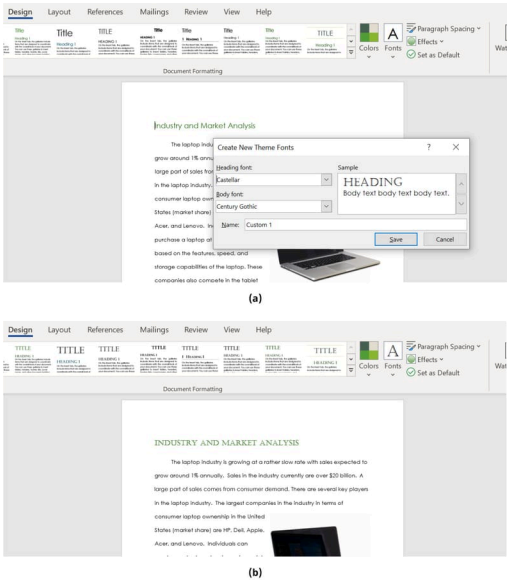


Figure 3. Customizing Theme Fonts for a Document. Used with permission from Microsoft.

Accessibility Tip: Choose fonts and colors that are easy to read. Use sufficient contrast between text and the page background, and avoid relying on color alone to communicate meaning.

Using Page Background Tools

The **Page Background** group on the Design tab provides tools for changing the appearance of a document's background.

Common options include:

- **Watermark:** Places light text or an image behind document content.

- **Page Color:** Changes the background color of the page.
- **Page Borders:** Adds a border around the page.

Understanding Watermarks

A **watermark** is text or an image displayed in the background of a document.

Watermarks are commonly used to indicate the status or purpose of a document.

Examples include:

- Draft
- Confidential
- Do Not Copy
- Company logos

For example, WorldCorp may use a **Confidential** watermark to identify an internal business report.

How to Insert a Watermark

1. Open your document in Microsoft Word.
2. Click the **Design** tab.
3. Locate the **Page Background** group.
4. Select **Watermark**.
5. Choose a preset watermark or select **Custom Watermark**.
6. Enter the desired text, such as **Confidential**.
7. Choose the font, color, and layout settings.
8. Click **OK** to apply the watermark.

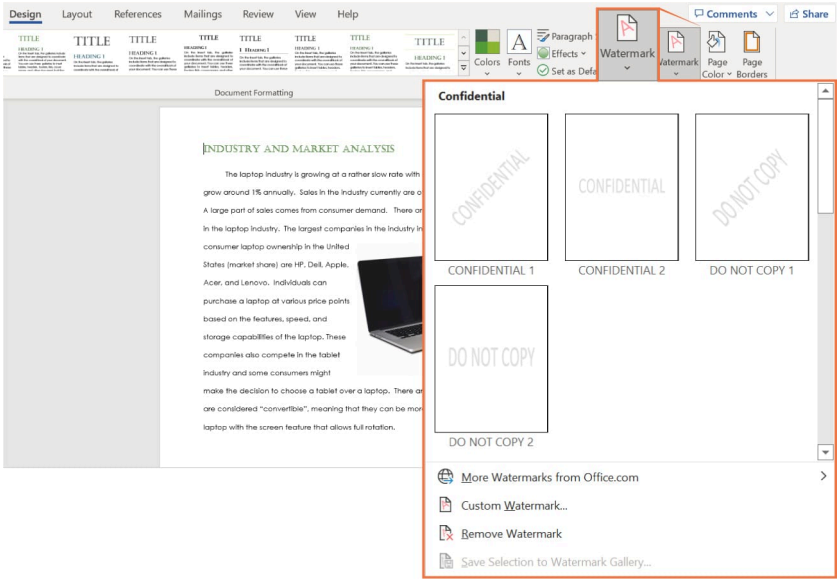


Figure 4. Watermark Options in Microsoft Word. Used with permission from Microsoft.

Customizing a Watermark

When creating a custom watermark, you may be able to adjust:

- The watermark text
- The font and size
- The color

- The transparency or washed-out appearance
- The diagonal or horizontal layout

For professional documents, watermarks should remain light enough that they do not interfere with reading the main text.

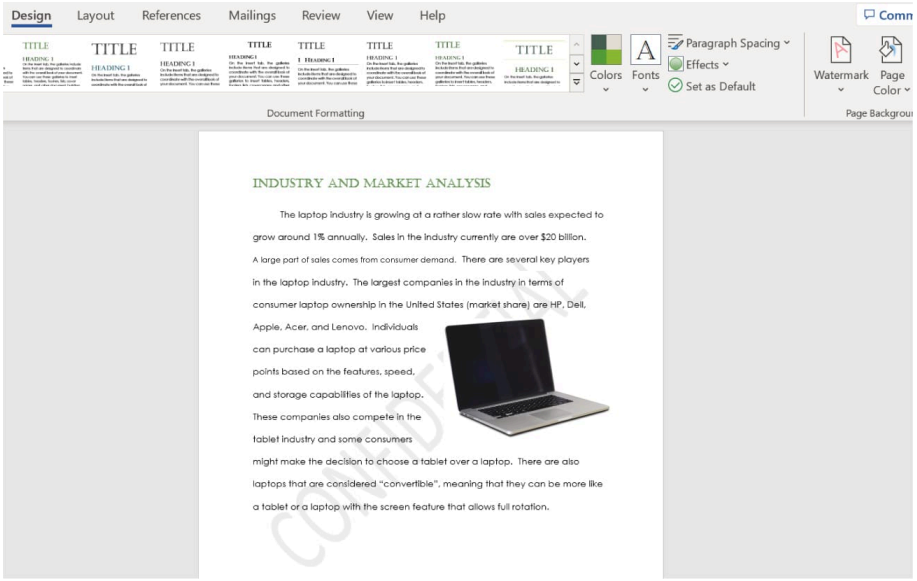


Figure 5. Example of a Confidential Watermark. Used with permission from Microsoft.

Removing a Watermark

1. Click the **Design** tab.
2. Select **Watermark**.
3. Choose **Remove Watermark**.

Practice: Designing a Professional Business Report

Purpose: Practice using styles, themes, fonts, colors, and watermarks to create a professional Microsoft Word document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **WorldCorp Market Trends Report**.
3. Create the following section headings:
    - Executive Summary
    - Industry Analysis
    - Market Trends
    - Recommendations
4. Write two or three sentences under each heading.
5. Apply the **Title** style to the document title.
6. Apply the **Heading 1** style to each section heading.
7. Apply the **Normal** style to the body paragraphs.
8. Click the **Design** tab and apply a document theme.
9. Change the theme colors to a green color palette or another professional color scheme.
10. Customize the theme fonts using readable fonts.
11. Insert a **Confidential** watermark.
12. Review the document to ensure the text remains easy to read.
13. Save the document as **WorldCorp_Document_Design_Practice.docx**.

Key Takeaways

- Document design helps create professional and readable documents.
- Styles provide consistent formatting for headings and body text.
- Themes coordinate colors, fonts, and visual effects.
- Templates provide predesigned layouts for common document types.
- Watermarks can identify document status or display company branding.
- Consistent formatting and accessible design improve the overall quality of a document.

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4.2: Microsoft Word- Advanced Formatting Features

Learning Objectives

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

- **Explore** advanced configuration options in Microsoft Word.
- **Customize** proofing, display, and document settings.
- **Insert** and format page numbers, headers, and footers.
- **Create** numbered, lettered, bulleted, and multilevel lists.
- **Apply** advanced formatting tools to organize a professional business report.

Introduction to Advanced Formatting

Microsoft Word includes advanced tools that help users create organized and professional documents.

These features are especially useful when preparing long business reports, research papers, manuals, and other documents that contain multiple sections.

For example, imagine you are continuing a market trends report for WorldCorp. Your supervisor wants the document to include consistent headings, page numbers, headers, footers, and organized lists.

You will use Word's advanced formatting features to improve the report's appearance and make it easier to navigate.

Preparing the Market Trends Report

Open the market trends report you created in an earlier section. If you do not have the original file, create a new document using these headings:

- Introduction/Executive Summary
- Industry and Market Analysis
- Competition
- SWOT Analysis
- Recommendations/Key Findings
- Summary

Apply a professional document theme and use Word's built-in heading styles to organize the report.

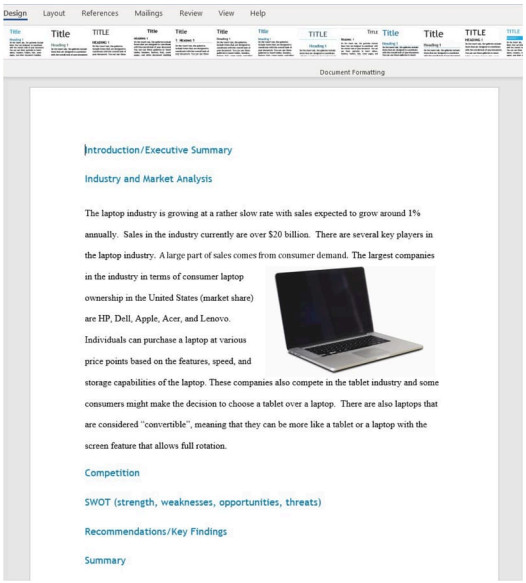


Figure 1. Example of a Market Trends Report with Formatted Headings. Used with permission from Microsoft.

Understanding Advanced Configuration Options

Microsoft Word includes configuration settings that allow you to customize how the program works.

These settings can help improve your productivity, editing experience, and document management.

Opening Word Options

1. Open Microsoft Word.
2. Click the **File** tab.
3. Select **Options**.
4. Review the available settings in the Word Options dialog box.

Common categories include General, Display, Proofing, Advanced, Save, and Trust Center.

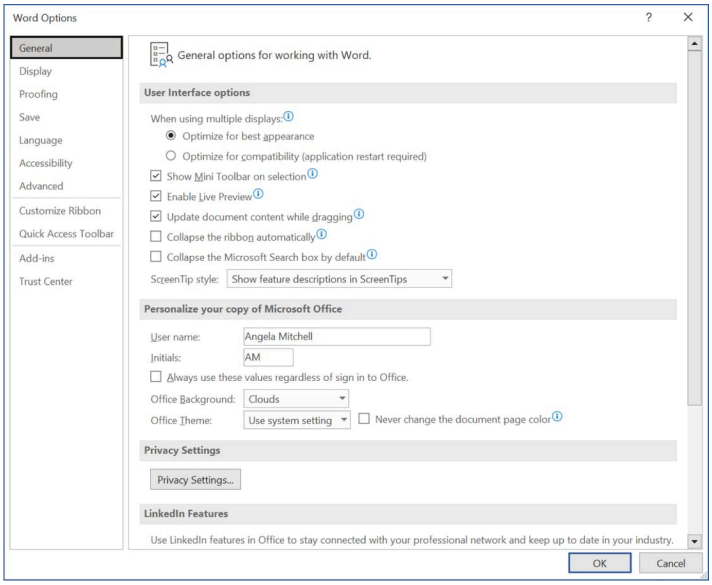


Figure 2. Word Options Dialog Box. Used with permission from Microsoft.

Mac Tip

In Microsoft Word for Mac, many program settings are available through **Word > Preferences** or **Word > Settings**, depending on the version.

Exploring General, Display, and Proofing Settings

General Settings

The **General** category includes settings related to your Word experience and user information.

For example, the user name associated with Word may appear in document comments and tracked changes.

When collaborating with others, make sure the appropriate name is associated with your contributions.

Display Settings

The **Display** category includes options for controlling how document content appears on the screen.

One useful feature is the ability to show formatting marks.

Formatting marks are symbols that identify hidden formatting, such as spaces, tabs, and paragraph breaks.

To display formatting marks while editing:

1. Click the **Home** tab.
2. Locate the **Paragraph** group.
3. Select the **Show/Hide (¶)** button.
4. Review the formatting marks in your document.
5. Click the button again to hide them.

Formatting marks can help you identify extra spaces, unnecessary paragraph breaks, and other formatting issues.

Proofing Settings

The **Proofing** category contains tools for checking spelling, grammar, and automatic corrections.

For example, Word may automatically correct common spelling mistakes or capitalize the first letter of a sentence.

Word also allows you to create custom dictionaries.

Using Custom Dictionaries

A **custom dictionary** stores words that Microsoft Word may not recognize in its standard dictionary.

This feature is useful for company names, specialized vocabulary, and industry terminology.

For example, Word might identify the company name **WorldCorp** as a spelling mistake.

Adding a Word to the Dictionary

1. Type a word that Word does not recognize.
2. Right-click the underlined word.
3. Review the spelling suggestions.

4. If the word is spelled correctly, select **Add to Dictionary**, when available.

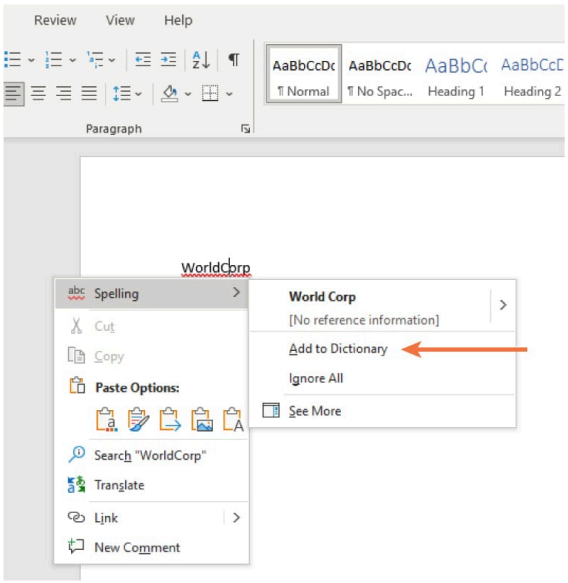


Figure 3. Adding a Company Name to the Custom Dictionary. Used with permission from Microsoft.

Important: Always verify the spelling before adding a word. Word may save the word exactly as entered, including mistakes.

Exploring Advanced Settings

The **Advanced** category contains additional settings that control how Word behaves.

Examples include:

- Editing options
- Cut, copy, and paste settings
- Image size and quality
- Document display settings
- Printing options
- Compatibility settings

You can explore these options through **File > Options > Advanced** in Word for Windows.

Change settings carefully because some options may affect how Word behaves across multiple documents.

Customizing the Quick Access Toolbar

The **Quick Access Toolbar** provides convenient access to frequently used commands.

Depending on your version and settings, it may include commands such as Save, Undo, and Redo.

You can customize it to include additional commands, such as Word Count or New Comment.

To customize the toolbar, open **File > Options > Quick Access Toolbar**, choose the commands you want, and save your changes.

Understanding Document Privacy

Microsoft Word includes tools that help you review hidden information before sharing a document.

The **Trust Center** contains security and privacy-related settings.

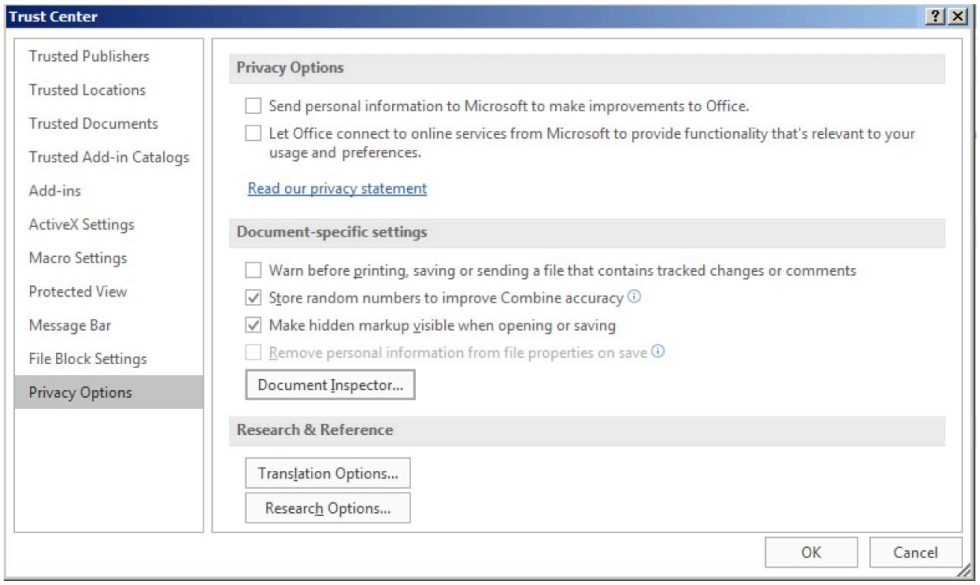


Figure 4. Privacy Settings in the Word Trust Center. Used with permission from Microsoft.

Using Document Inspector

Document Inspector helps identify information that may be stored within a Word document, including comments, document properties, and certain types of hidden content.

To inspect a document in Word for Windows:

1. Save a copy of the document before making changes.
2. Click **File**.
3. Select **Info**.
4. Choose **Check for Issues**.
5. Select **Inspect Document**.
6. Choose the information categories you want to inspect.
7. Click **Inspect**.
8. Review the results before removing any information.

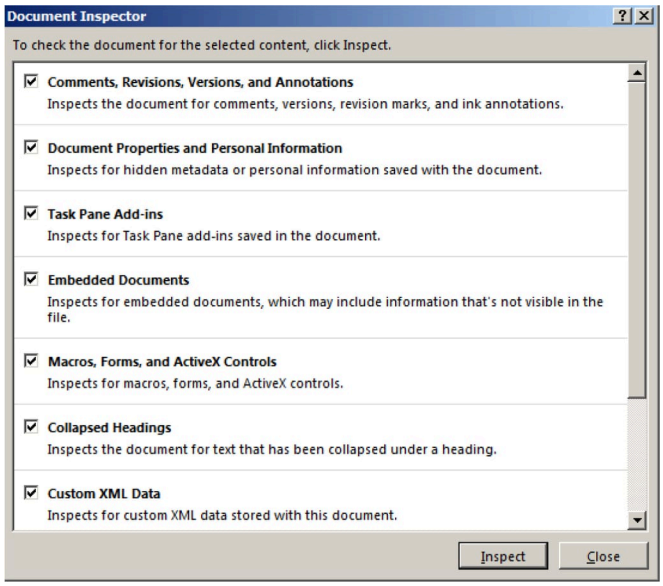


Figure 5. Inspecting a Document for Hidden Information. Used with permission from Microsoft.

Important: Removing hidden information may permanently delete comments, document properties, or other content from the inspected copy. Review the results carefully.

Inserting Page Numbers

Page numbering automatically places page numbers in a document.

Page numbers are useful in business reports, proposals, manuals, and other documents with multiple pages.

How to Insert Page Numbers

1. Open your document in Microsoft Word.
2. Click the **Insert** tab.
3. Locate the **Header & Footer** group.
4. Select **Page Number**.
5. Choose a location, such as **Bottom of Page**.
6. Select a page numbering style.
7. Close the header and footer editing area.

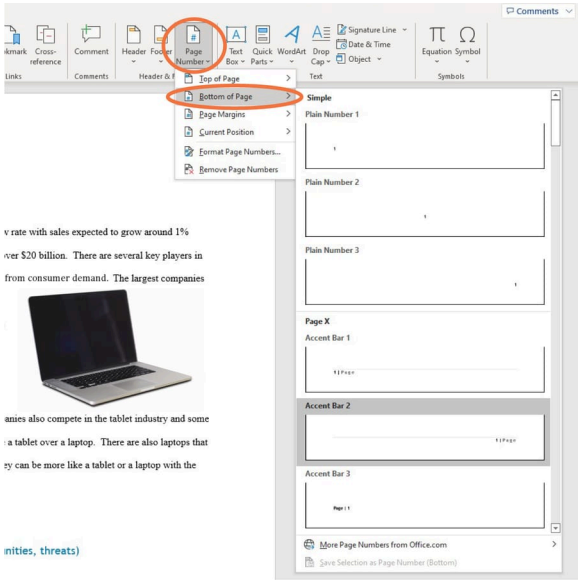


Figure 6. Page Numbering Options in Microsoft Word. Used with permission from Microsoft.

Customizing Page Numbers

Word allows you to customize page numbering in several ways:

- Change the location of page numbers.
- Use different number formats, such as 1, 2, 3 or i, ii, iii.
- Restart page numbering in a new section.
- Hide the page number on the first page.

For example, a business report may have a cover page without a visible page number and begin numbering the main content on a later page.

Inserting Headers and Footers

A **header** is an area at the top of a page that can display information such as a document title, company name, or date.

A **footer** is an area at the bottom of a page that can contain page numbers, contact information, or other details.

How to Insert a Header

1. Click the **Insert** tab.
2. Select **Header**.
3. Choose a built-in header style or select a blank header.
4. Enter the information you want displayed.
5. Close the header and footer editing area.

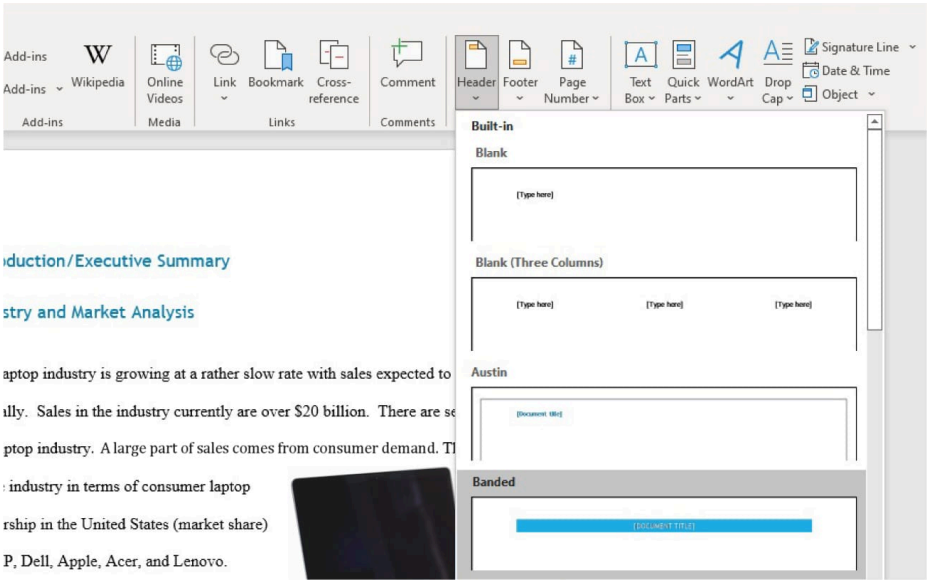


Figure 7. Built-In Header Styles in Microsoft Word. Used with permission from Microsoft.

Editing a Header

Double-click the header area to edit its content.

While editing a header, Word displays additional header and footer commands.

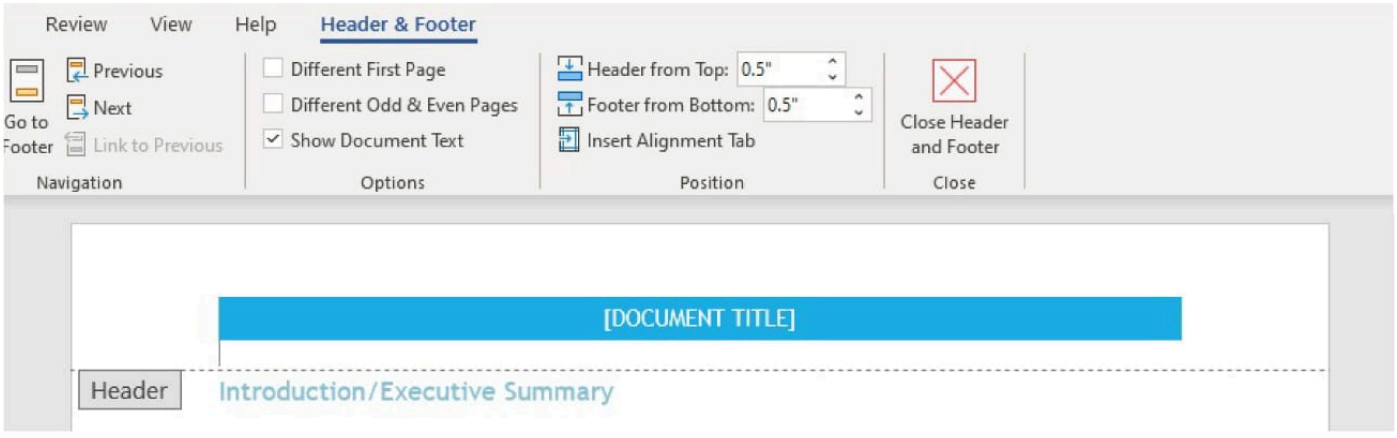


Figure 8. Editing a Header Using Header and Footer Tools. Used with permission from Microsoft.

For the WorldCorp market trends report, you might enter:

WorldCorp Market Trends Report — 2026

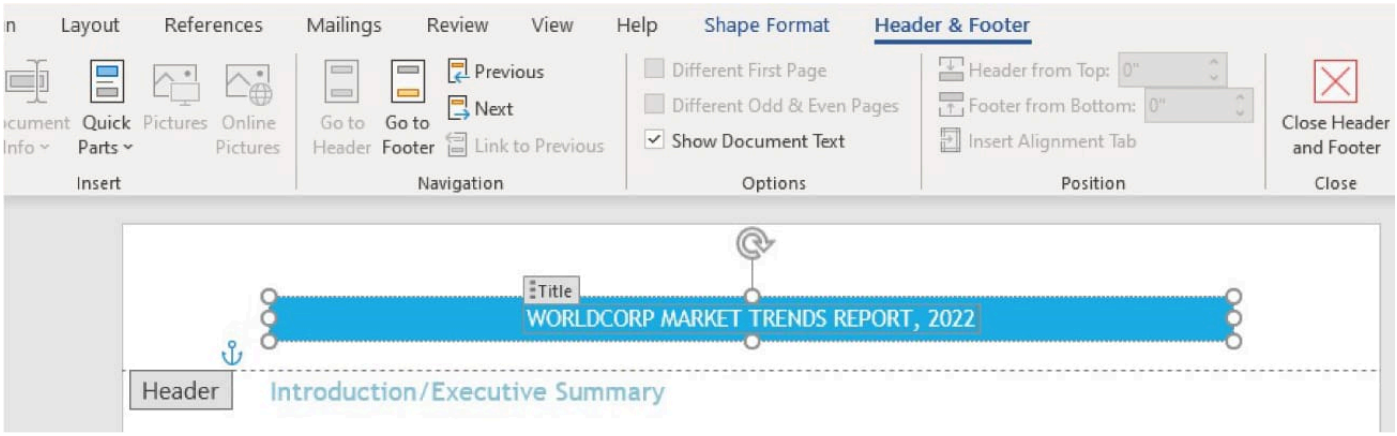


Figure 9. Entering Text into a Document Header. Used with permission from Microsoft.

Adding Document Properties

Microsoft Word can also insert information stored in a document's properties.

Examples include:

- Document title
- Author
- Company name
- Company address
- Subject

Some of these fields are available through **Insert > Quick Parts > Document Property** in supported desktop versions of Word.

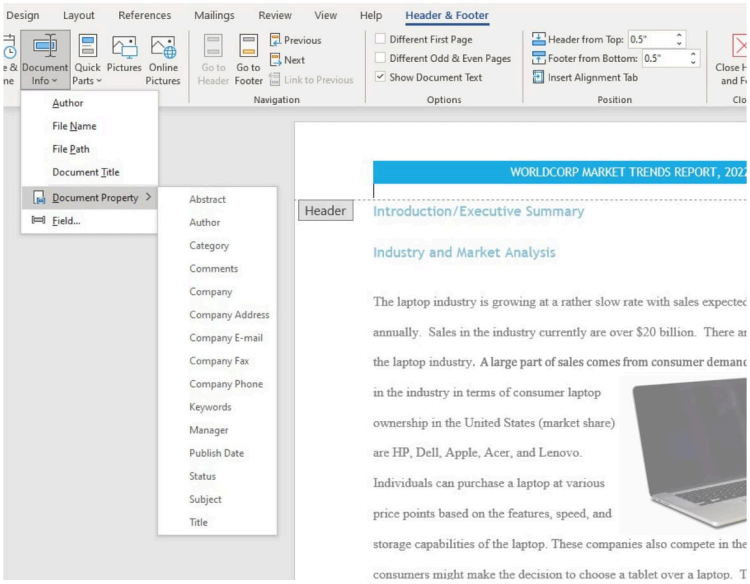


Figure 10. Inserting Document Properties into a Header. Used with permission from Microsoft.

Creating Different Headers

Word allows you to create different headers for certain pages.

Common options include:

- **Different First Page:** Uses a separate header or footer for the first page.

- **Different Odd & Even Pages:** Allows odd-numbered and even-numbered pages to have different headers or footers.

These settings are available while editing headers and footers.

How to Insert a Footer

1. Click the **Insert** tab.
2. Select **Footer**.
3. Choose a footer style.
4. Enter the desired information.
5. Close the header and footer editing area.

Creating Lists in Microsoft Word

Lists help organize information and make important details easier to read.

For example, the WorldCorp market trends report may include lists of competitors, products, and business recommendations.

Microsoft Word supports several list formats:

- **Numbered Lists:** Use numbers to organize information.
- **Lettered Lists:** Use letters to organize items.
- **Bulleted Lists:** Use symbols to identify items.
- **Multilevel Lists:** Use multiple levels to show relationships between main topics and subtopics.

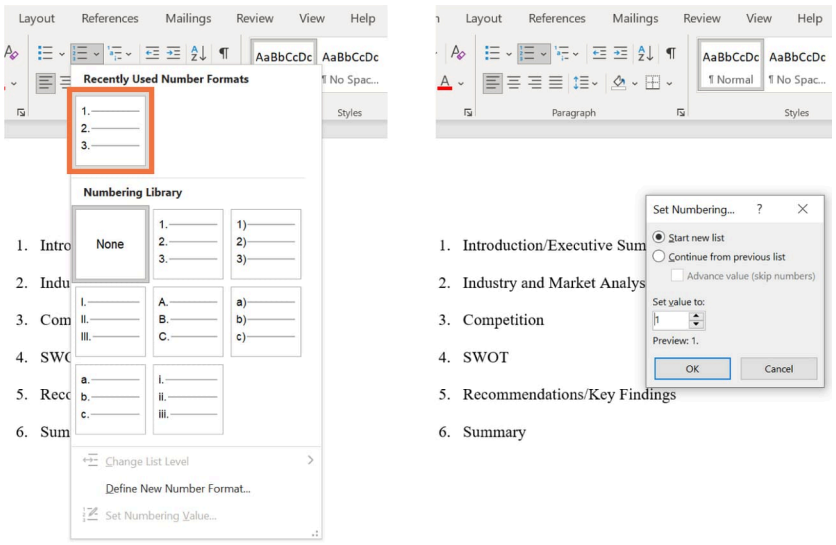
Creating Numbered and Lettered Lists

Numbered and lettered lists are useful when information follows a sequence or order.

How to Create a Numbered List

1. Type the items you want to include, placing each item in a separate paragraph.
2. Select the items.
3. Click the **Home** tab.
4. Locate the **Paragraph** group.
5. Select **Numbering**.
6. Choose a numbering style.

To create a lettered list, open the Numbering menu and choose a letter-based format.



(a) (b)

Figure 11. Numbered and Lettered List Formatting Options. Used with permission from Microsoft.

Creating Bulleted Lists

Bulleted lists are useful when the items do not need to appear in a specific order.

For example, a business report might use bullets to identify:

- Major competitors
- Customer needs
- Industry challenges
- Business opportunities

How to Create a Bulleted List

1. Select the text you want to format.
2. Click the **Home** tab.
3. Locate the **Paragraph** group.
4. Select **Bullets**.
5. Choose the desired bullet style.

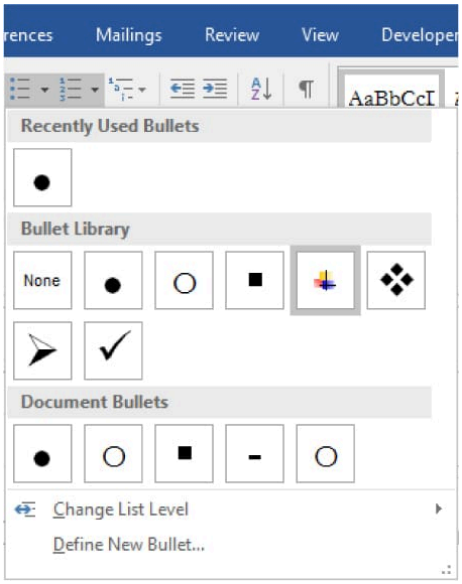


Figure 12. Bulleted List Styles in Microsoft Word. Used with permission from Microsoft.

Creating Multilevel Lists

A **multilevel list** organizes information into multiple levels.

Multilevel lists are especially useful for outlines, business reports, and documents containing main topics and subtopics.

For example, the WorldCorp market trends report may include the following outline:

1. Introduction/Executive Summary
2. Industry and Market Analysis
    1. Industry Type
    2. Industry Category
    3. Industry Characteristics
        1. Trends
        2. Stability
    4. Market Segmentation
        1. Total Available Market
        2. Target Market
        3. Market Segments
3. Competition
    1. Direct Competitors
    2. Uniqueness
4. SWOT
    1. Strengths
    2. Weaknesses
    3. Opportunities
    4. Threats
5. Recommendations/Key Findings
    1. Key Findings
    2. Next Steps
6. Summary

How to Create a Multilevel List

1. Type the items you want to include in the outline.
2. Select the list.

3. Click the **Home** tab.
4. Locate the **Paragraph** group.
5. Select **Multilevel List**.
6. Choose a multilevel list style.

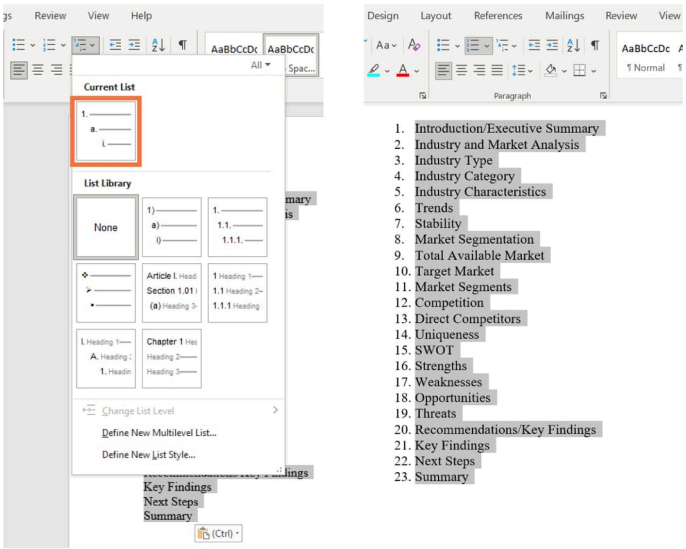


Figure 13. Selecting a Multilevel List Format. Used with permission from Microsoft.

Adjusting List Levels

After creating a multilevel list, you can change the level of individual items.

1. Place the insertion point within the list item you want to change.
2. Click the **Home** tab.
3. Select **Increase Indent** to move the item to a lower level, or use the Multilevel List menu's **Change List Level** command.
4. Repeat as needed to organize the outline.

Depending on the list settings, pressing Tab at the beginning of a list item may also change its level.

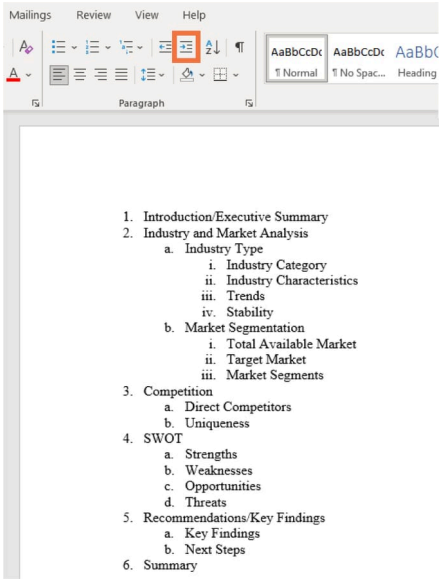


Figure 14. Organizing a Document Outline with Multiple List Levels. Used with permission from Microsoft.

Applying Heading Styles to an Outline

After creating an outline, you can apply Word's built-in heading styles to the corresponding sections in your report.

For example:

- **Heading 1:** Major report sections.
- **Heading 2:** Subsections within major sections.
- **Heading 3:** Smaller topics within subsections.

Using heading styles helps organize the document and supports automatic table of contents creation.

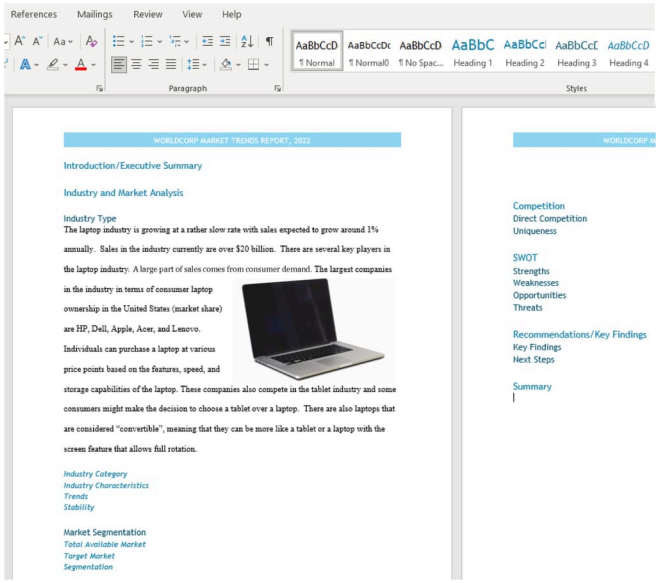


Figure 15. Applying Heading Styles to Organize a Business Report. Used with permission from Microsoft.

Practice: Advanced Formatting in Microsoft Word

Purpose: Practice using advanced formatting tools to create a professional business report.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **WorldCorp Market Trends Report**.
3. Create the following major headings:
    - Executive Summary
    - Industry and Market Analysis
    - Competition
    - SWOT Analysis
    - Recommendations
4. Apply the **Heading 1** style to each major heading.
5. Write two or three sentences under each heading.
6. Insert a header containing **WorldCorp Market Trends Report**.
7. Insert page numbers at the bottom of the document.
8. Create a bulleted list of three industry trends.
9. Create a numbered list of three business recommendations.
10. Create a multilevel list containing at least two main topics and two subtopics.
11. Open Word Options and review the General, Display, and Proofing categories.
12. Turn on formatting marks to review the document, then turn them off.
13. Save the document as **Advanced_Formatting_Practice.docx**.

Key Takeaways

- Word Options allows users to customize program settings.
- Proofing tools help identify spelling and grammar issues.
- Document Inspector can identify certain types of hidden information.
- Page numbers help readers navigate long documents.
- Headers and footers display repeated document information.
- Bulleted and numbered lists help organize information.
- Multilevel lists display relationships between topics and subtopics.
- Heading styles improve document organization and navigation.

Additional Learning Resource

Microsoft provides additional tutorials and support resources for Word's advanced settings.

Explore Microsoft's advanced Word settings support resource.

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5: CHAPTER 5- MAINTAINING DOCUMENTS

5.1: Collaborative Editing and Reviewing in Microsoft Word

5.2: Managing Long Documents in Microsoft Word

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5.1: Collaborative Editing and Reviewing in Microsoft Word

Learning Objectives

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

- **Use** collaborative editing tools to review and improve documents with others.
- **Apply** comments and Track Changes to provide feedback.
- **Accept** or reject suggested changes to finalize a document.
- **Use** proofing tools and Microsoft Editor to improve writing quality.
- **Identify** document protection options for controlling edits.
- **Apply** professional document review practices.

Understanding Collaborative Editing

Collaborative editing is the process of working with others to review, revise, and improve a document.

Microsoft Word provides tools that allow multiple people to contribute feedback, suggest revisions, and review changes.

For example, imagine you are preparing a market trends report for WorldCorp. Different departments may provide information about sales, customers, competitors, and business operations.

Before submitting the final report, you may need feedback from your supervisor and coworkers.

Word's collaborative tools help you organize this feedback and make appropriate revisions.

Exploring the Review Tab

The **Review** tab contains tools for proofreading, commenting, tracking changes, and protecting documents.

Common features include:

- **Spelling and Grammar:** Identifies possible writing errors.
- **Comments:** Allows reviewers to leave questions or suggestions.
- **Track Changes:** Records revisions made to a document.
- **Accept and Reject:** Allows users to approve or decline tracked changes.
- **Restrict Editing:** Helps control how other users can modify a document.
- **Editor:** Provides writing suggestions related to grammar, clarity, and style.

Using Proofreading Tools

Proofreading involves reviewing a document for spelling, grammar, punctuation, and writing errors.

Microsoft Word includes tools that can help identify potential mistakes.

How to Check Spelling and Grammar

1. Open your document in Microsoft Word.
2. Click the **Review** tab.
3. Select **Editor** or **Spelling & Grammar**, depending on your version of Word.
4. Review the suggestions provided.
5. Accept or ignore each suggestion as appropriate.

6. Read through the document again to check for errors the software may have missed.

Important: Spelling and grammar tools do not identify every mistake. For example, using "four" instead of "for" may not always be flagged because both are correctly spelled words.

Customizing Proofing Language and Dictionaries

Word allows users to change proofing language settings and add specialized vocabulary to custom dictionaries.

For example, American English uses the spelling **favor**, while British English commonly uses **favour**.

Choosing the correct proofing language helps Word provide more appropriate suggestions.

Adding a Word to a Custom Dictionary

1. Type a word that Word does not recognize.
2. Right-click the underlined word.
3. Review the spelling suggestions.
4. If the word is correct, select **Add to Dictionary**, when available.

This feature is useful for company names, industry terminology, and commonly used abbreviations.

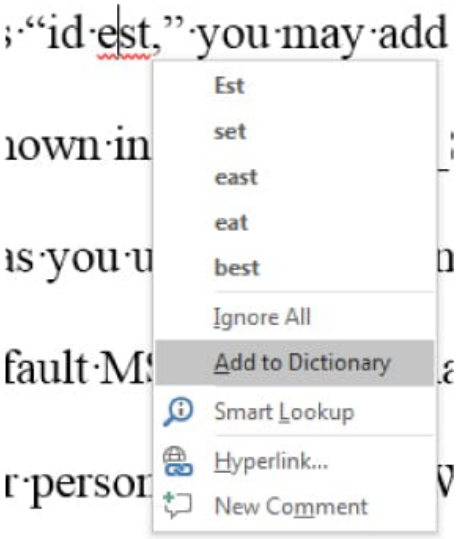


Figure 1. Adding Specialized Vocabulary to a Custom Dictionary. Used with permission from Microsoft.

Tip: Always confirm that a word is spelled correctly before adding it to your dictionary.

Using Comments in Microsoft Word

Comments allow users to leave feedback without directly changing the document's main text.

Comments are useful for:

- Asking questions about information.
- Suggesting improvements.
- Identifying sections that need clarification.
- Requesting additional information.
- Communicating with other reviewers.

How to Insert a Comment

1. Select the text you want to comment on.
2. Click the **Review** tab.
3. Select **New Comment**.
4. Type your feedback in the comment box.
5. Select **Post Comment** or the available posting control.

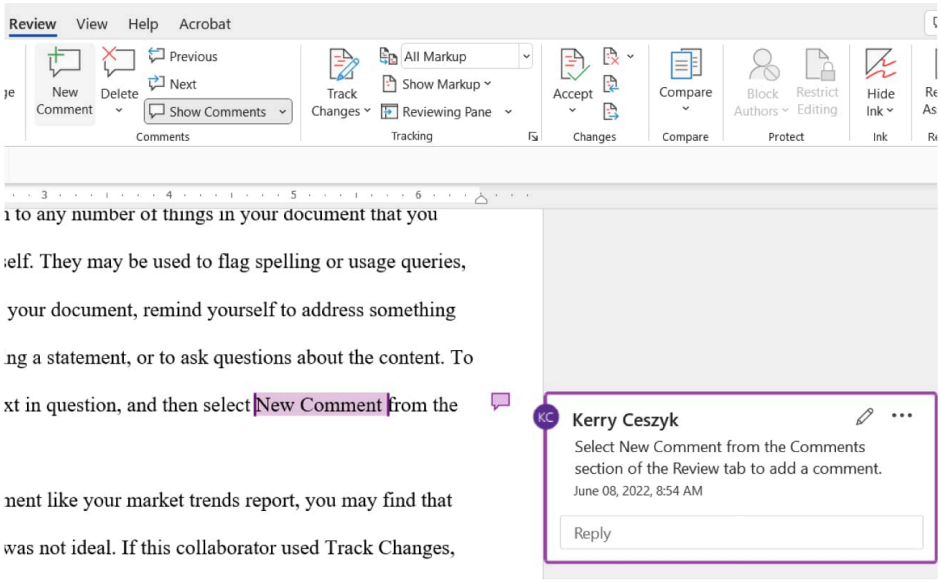


Figure 2. Adding Comments to a Document. Used with permission from Microsoft.

Replying to and Resolving Comments

When reviewing a document, you can reply to comments and discuss suggested improvements.

Once an issue has been addressed, you can resolve the comment.

Resolving a comment marks the discussion as completed while generally retaining it in the document's comment history.

Deleting a comment removes the comment thread from the document.

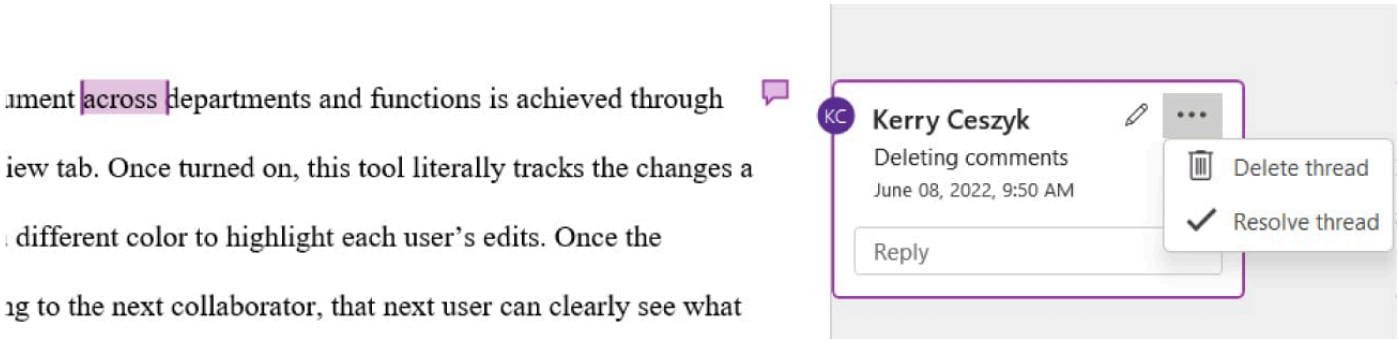


Figure 3. Resolving or Deleting Comments. Used with permission from Microsoft.

Tracking Changes in Microsoft Word

Track Changes records edits made to a document so reviewers can see what has been added, removed, or modified.

This feature is useful when multiple people are reviewing the same document.

For example, your supervisor might revise a sentence in the WorldCorp market trends report. Track Changes allows you to review the suggested revision before accepting it.

How to Turn On Track Changes

1. Open your document in Microsoft Word.
2. Click the **Review** tab.
3. Select **Track Changes**.
4. Make a change to the document.
5. Review how Word displays the revision.

Depending on the settings, Word may display deleted text with strikethrough formatting and added text with a different color or underline.

Viewing Tracked Changes

Word provides different display options for reviewing changes.

- **All Markup:** Displays tracked changes and comments.
- **Simple Markup:** Provides a simplified view of revisions.
- **No Markup:** Displays the document without showing revision marks.
- **Original:** Displays the document as it appeared before tracked revisions.

These options help reviewers focus on the information they need.

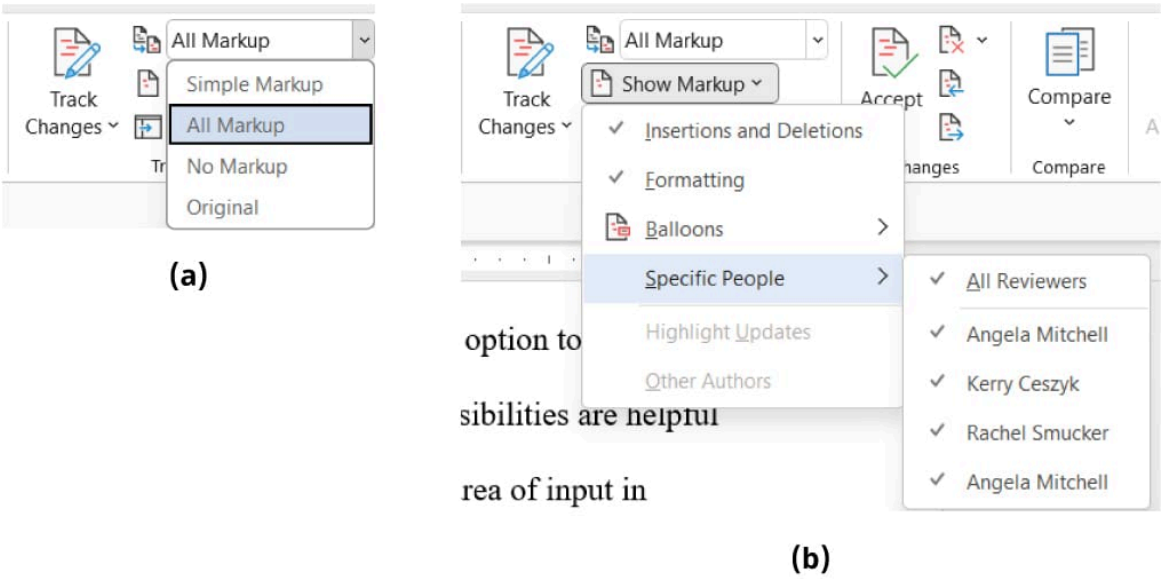


Figure 4. Displaying and Filtering Tracked Changes. Used with permission from Microsoft.

Important: Selecting No Markup only hides the visible revision marks. It does not remove the tracked changes from the document.

Accepting and Rejecting Changes

After reviewing tracked changes, you can decide whether to keep or remove each suggested revision.

- **Accept:** Keeps the suggested change.
- **Reject:** Discards the suggested change.

How to Accept or Reject a Change

1. Click the **Review** tab.
2. Locate the **Changes** group.
3. Select a tracked change.
4. Click **Accept** to keep the revision or **Reject** to discard it.
5. Continue reviewing the remaining changes.

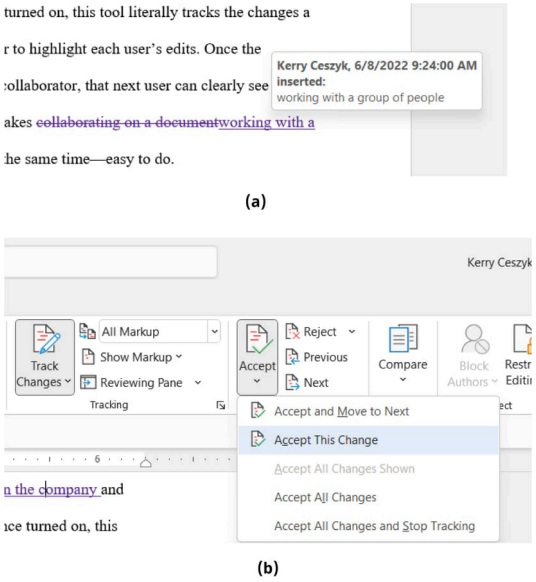


Figure 5. Reviewing and Accepting Tracked Changes. Used with permission from Microsoft.

Tip: Review changes individually before using an option such as Accept All Changes. This helps ensure that the final document remains accurate.

Real-World Application: Résumé Peer Review

When applying for a job, you may ask a classmate, instructor, or career counselor to review your résumé.

Microsoft Word's collaboration tools make it possible to receive feedback and improve the document.

For example, a reviewer may:

- Leave a comment suggesting a clearer description of your work experience.
- Use Track Changes to recommend stronger action verbs.
- Identify formatting inconsistencies.
- Suggest improvements to spelling, grammar, or organization.

You can then review the suggestions, accept appropriate changes, and resolve comments before preparing the final résumé.

Professional Tip: Share your résumé only with people you trust, especially when it contains personal contact information.

Protecting a Document

Microsoft Word includes options for restricting how other users can edit a document.

The **Restrict Editing** feature allows document creators to limit certain types of changes.

This can be useful when sharing forms, reports, or documents that must maintain consistent formatting.

How to Restrict Editing

1. Open the document in Microsoft Word for Windows.
2. Click the **Review** tab.
3. Select **Restrict Editing**.
4. Review the available formatting and editing restrictions.
5. Choose the restrictions you want to apply.
6. Start enforcement if required.

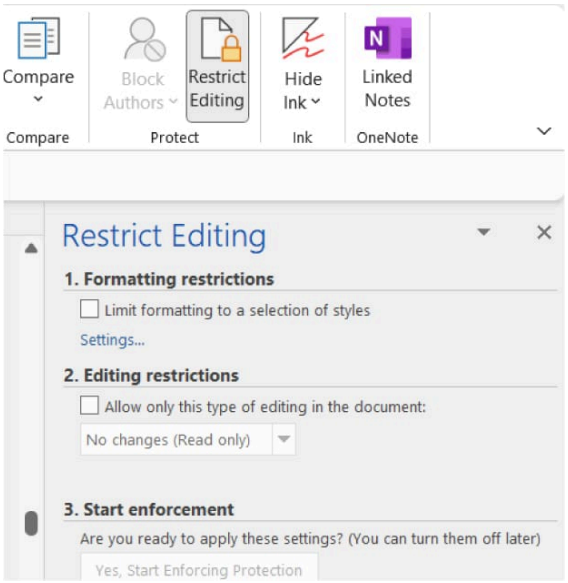
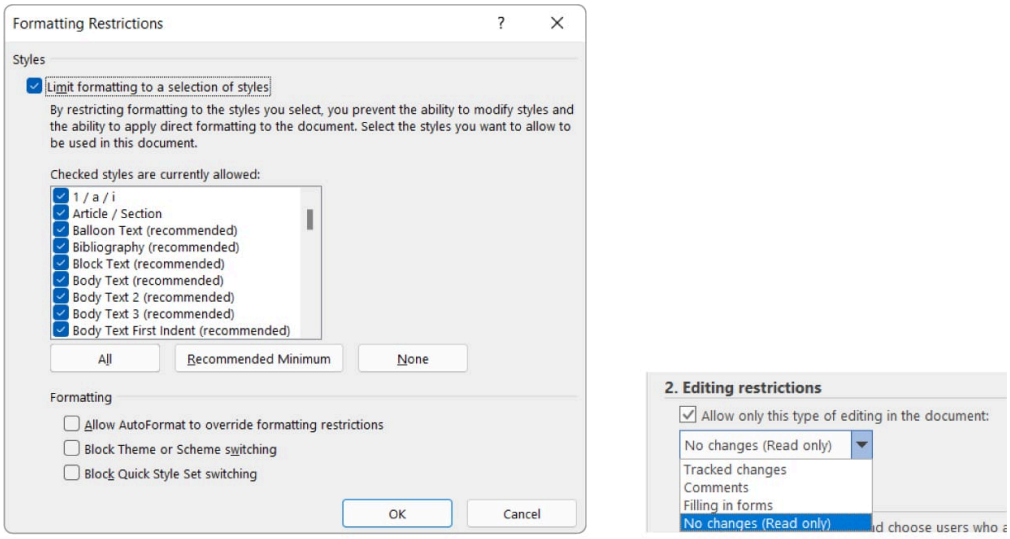


Figure 6. Restrict Editing Options in Microsoft Word. Used with permission from Microsoft.

Understanding Editing Restrictions

Depending on the version of Word and document settings, available restrictions may include:

- Limiting formatting to selected styles.
- Allowing only comments.
- Allowing only tracked changes.
- Preventing direct editing of the document.



(a) (b)

Figure 7. Formatting and Editing Restriction Settings. Used with permission from Microsoft.

Important: Restrict Editing is not a substitute for strong security controls. Use appropriate file permissions and sharing settings when working with sensitive information.

Mac Tip

Microsoft Word for Mac also includes document protection and read-only options. Available controls and menu locations may differ from Word for Windows.

Using Microsoft Editor

Microsoft Editor provides writing suggestions that go beyond basic spelling and grammar checks.

Depending on the Word version and Microsoft 365 subscription, Editor may offer suggestions related to:

- Spelling
- Grammar
- Punctuation
- Clarity
- Conciseness
- Formality
- Vocabulary
- Inclusive language

How to Use Microsoft Editor

1. Open your document in Microsoft Word.
2. Click the **Home** or **Review** tab.
3. Select **Editor**.
4. Review the writing suggestions.
5. Select a suggestion to see more information.
6. Accept or ignore the suggestion as appropriate.
7. Review the final document for accuracy and readability.

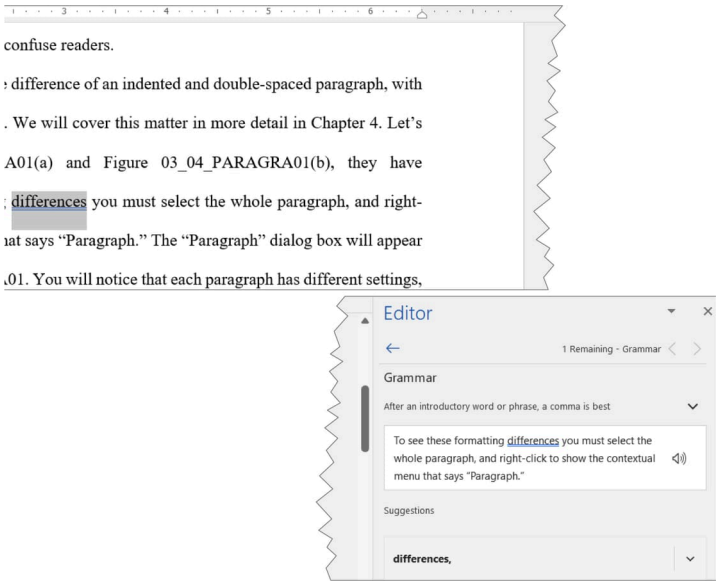


Figure 8. Reviewing Writing Suggestions with Microsoft Editor. Used with permission from Microsoft.

Important: Microsoft Editor provides suggestions, but the document author is responsible for deciding whether each recommendation is appropriate.

Practice: Reviewing a Professional Business Document

Purpose: Practice using Microsoft Word's proofreading, commenting, and Track Changes tools to improve a business document.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **WorldCorp Business Report Review**.
3. Write two short paragraphs describing a business or industry of your choice.
4. Intentionally include two spelling or grammar mistakes.
5. Use **Microsoft Editor** or Word's spelling and grammar tools to identify and correct the mistakes.
6. Select one sentence and insert a comment suggesting an improvement.
7. Reply to the comment with a short explanation.
8. Resolve the comment after addressing the suggestion.
9. Turn on **Track Changes**.
10. Revise at least two sentences in the document.
11. Review the tracked changes using **All Markup**.
12. Accept one change and reject another change.
13. Turn off Track Changes when finished.
14. Review the document to make sure it is professional and easy to read.
15. Save the document as **Business_Document_Review_Practice.docx**.

Key Takeaways

- Collaborative editing allows multiple people to review and improve documents.
- The Review tab includes proofreading, commenting, and revision tools.
- Comments help reviewers communicate without directly changing the main text.
- Track Changes records edits for review.
- Accept and Reject commands allow users to control which revisions become part of the final document.
- Restrict Editing can limit certain types of document changes.
- Microsoft Editor provides suggestions for improving writing quality.
- Careful proofreading and professional feedback improve the quality of business documents.

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5.2: Managing Long Documents in Microsoft Word

Learning Objectives

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

- **Use** page breaks, blank pages, and cover pages to organize long documents.
- **Apply** Format Painter to maintain consistent formatting.
- **Create** and update an automatic table of contents.
- **Insert** footnotes, endnotes, and figure captions.
- **Generate** a table of figures.
- **Create** bookmarks and hyperlinks for document navigation.
- **Recognize** the importance of citing sources and maintaining academic integrity.

Understanding Long Documents

Long documents, such as business reports, manuals, and research papers, require clear organization so readers can find information quickly.

Microsoft Word includes tools that make these documents easier to navigate and maintain.

For example, imagine you are preparing a market trends report for WorldCorp. Company executives may want to review the executive summary, examine a particular chart, or jump directly to the recommendations.

Tools such as tables of contents, bookmarks, and tables of figures make this possible without scrolling through the entire report.

Using the Pages Command Group

The **Pages** group on the **Insert** tab includes three useful commands:

- **Page Break:** Starts the following content on a new page.
- **Blank Page:** Inserts an additional blank page.
- **Cover Page:** Adds a professionally designed title page.

Inserting a Page Break

A **page break** moves the content following the break to the next page.

Page breaks are useful when starting a new chapter or major report section.

1. Place the insertion point where you want the new page to begin.
2. Click the **Insert** tab.
3. Select **Page Break**.
4. Confirm that the following text begins on a new page.

Keyboard Shortcut: Press **Ctrl + Enter** in Word for Windows to insert a page break.

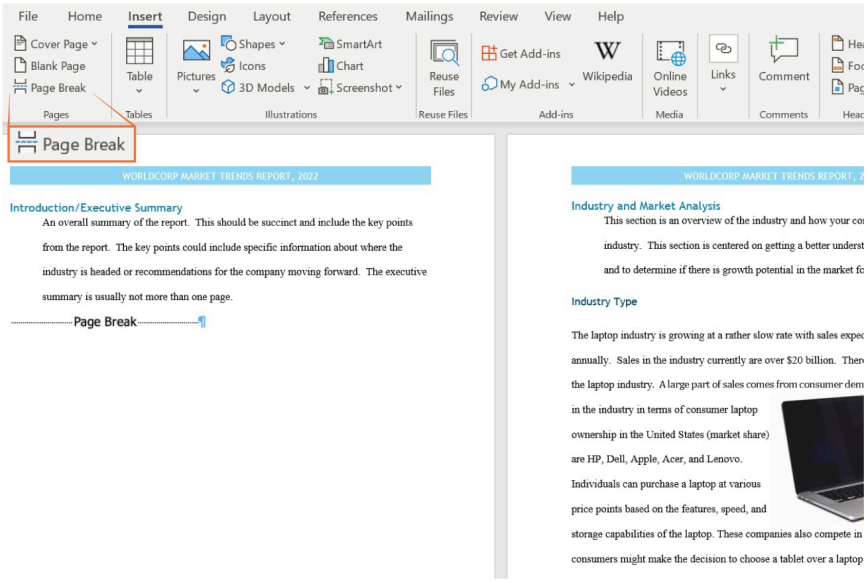


Figure 1. Using a Page Break to Start a New Section. Used with permission from Microsoft.

Inserting a Blank Page

A **blank page** adds an empty page to a document.

Blank pages may be used in books, reports, or other publications where a new section must begin on a particular page.

1. Place the insertion point where you want to add the blank page.
2. Click **Insert**.
3. Select **Blank Page**.
4. Review the document to confirm the page is in the correct location.

Inserting a Cover Page

A **cover page**, also called a title page, introduces a document.

Cover pages commonly include:

- Document title
- Author or organization
- Department or division
- Date
- Company logo, when appropriate

How to Add a Cover Page

1. Click the **Insert** tab.
2. Select **Cover Page**.
3. Choose a design from the available gallery.
4. Replace the sample text with your own information.
5. Insert a logo or image if appropriate.
6. Review the cover page for consistency and readability.

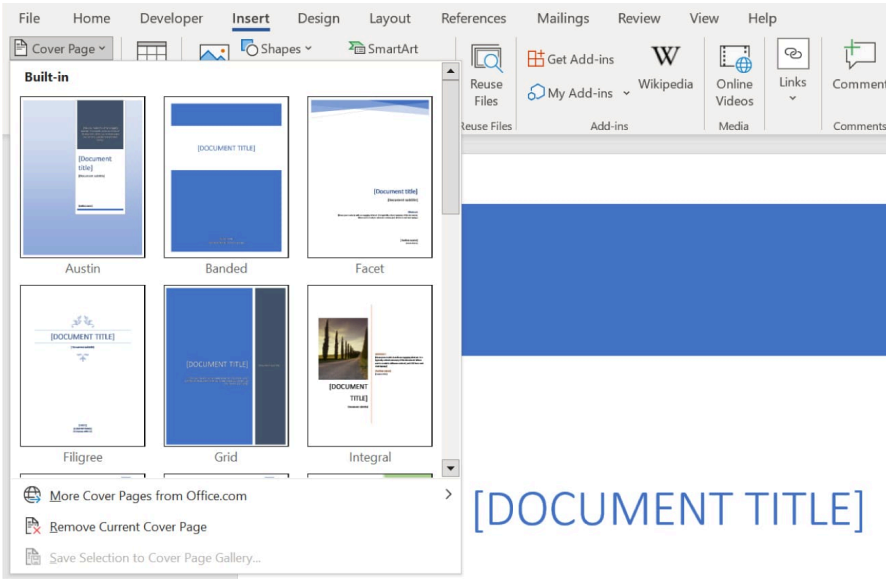


Figure 2. Selecting a Cover Page Design. Used with permission from Microsoft.

Using Format Painter

Format Painter copies formatting from one section of text and applies it to another.

This tool is useful when you want multiple headings or paragraphs to have the same appearance.

How to Use Format Painter

1. Select the text that contains the formatting you want to copy.
2. Click the **Home** tab.
3. Select **Format Painter** from the Clipboard group.
4. Highlight the text where you want to apply the formatting.
5. Review the result.

Tip: Double-click Format Painter to apply the same formatting to multiple locations. Press **Esc** when finished.

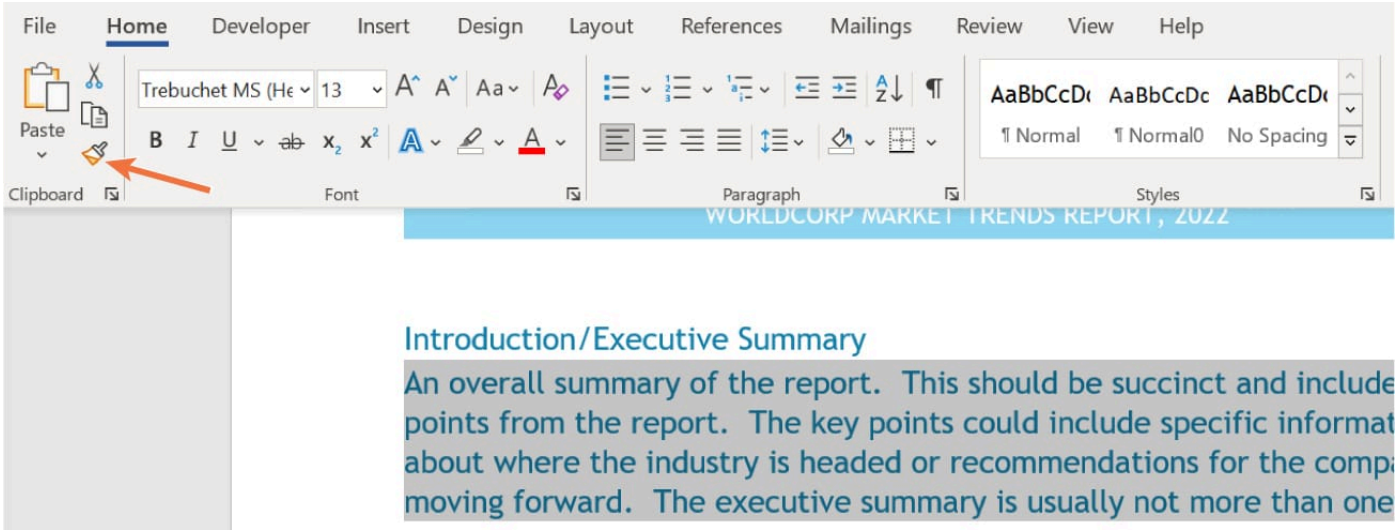


Figure 3. Applying Consistent Formatting with Format Painter. Used with permission from Microsoft.

For long documents, Word's built-in styles are generally a better choice for maintaining consistent headings throughout the

document.

Exploring the References Tab

The **References** tab includes tools for organizing sources, notes, captions, and navigation features.

Common groups include:

- **Table of Contents:** Creates an outline of document headings and page numbers.
- **Footnotes:** Inserts notes and references.
- **Citations & Bibliography:** Helps manage sources and citations.
- **Captions:** Labels tables, images, and other figures.
- **Index:** Helps create an alphabetical list of topics.
- **Table of Authorities:** Organizes legal citations.

Some versions of Word may include additional research tools.

Creating a Table of Contents

A **table of contents** lists the major sections of a document and their page numbers.

Word can generate a table of contents automatically when you use built-in heading styles.

Preparing Your Headings

Before inserting a table of contents, apply heading styles to your document.

- **Heading 1:** Major sections.
- **Heading 2:** Subsections.
- **Heading 3:** Smaller topics within subsections.

For example, the WorldCorp report may include:

- Executive Summary
- Industry and Market Analysis
- Competition
- SWOT Analysis
- Recommendations
- Conclusion

Using built-in heading styles also makes these sections available in the Navigation Pane.

Understanding Page Breaks and Section Breaks

Page breaks and section breaks are different features:

- **Page Break:** Moves content to the next page without creating a new formatting section.
- **Section Break:** Creates a new document section that can have different margins, orientation, headers, footers, or page numbering.

Word includes several section break options, including Next Page and Continuous.

Section breaks can be helpful when different parts of a report require different page numbering or layout settings.

How to Insert a Table of Contents

1. Apply the appropriate heading styles throughout your document.
2. Place the insertion point where you want the table of contents to appear.
3. Click the **References** tab.
4. Select **Table of Contents**.
5. Choose an automatic table of contents style.
6. Review the headings and page numbers.

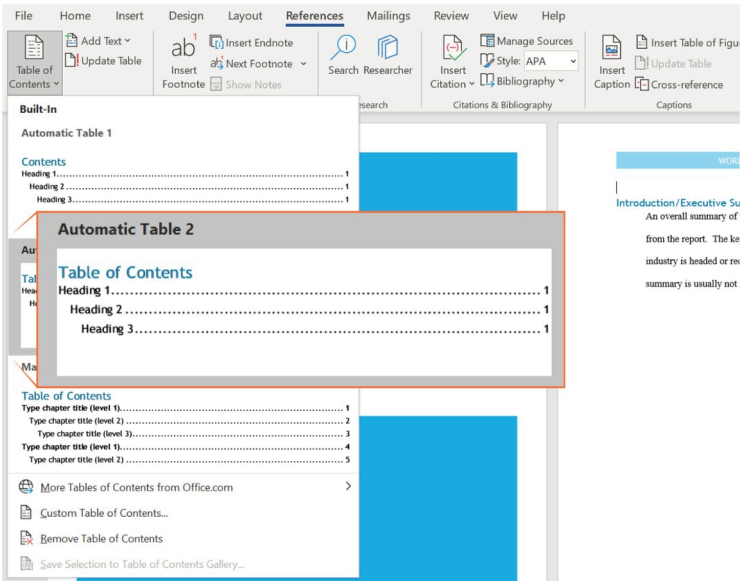


Figure 4. Selecting an Automatic Table of Contents. Used with permission from Microsoft.

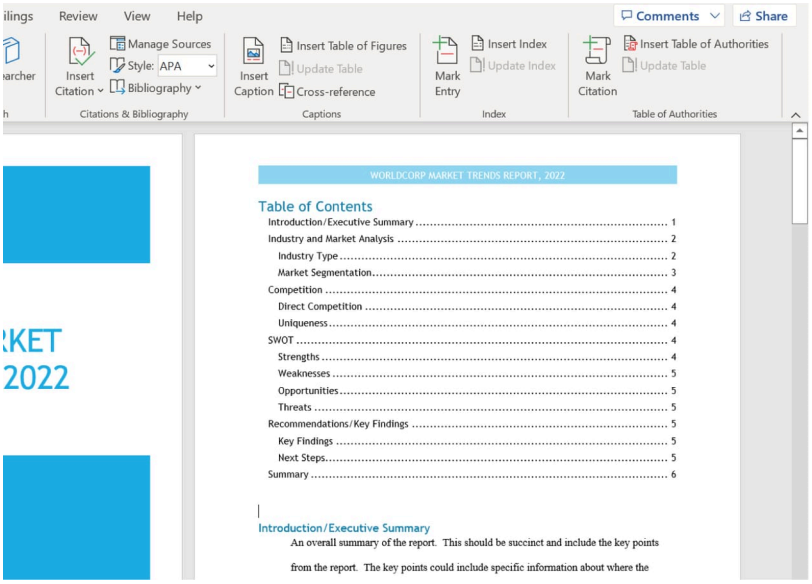


Figure 5. Example of an Automatically Generated Table of Contents. Used with permission from Microsoft.

Updating a Table of Contents

If you add, remove, or rename headings, you may need to update the table of contents.

1. Click anywhere inside the table of contents.
2. Select **Update Table**.
3. Choose whether to update page numbers only or the entire table.

4. Confirm the update.

Tip: Update the entire table when you have added, removed, or renamed headings.

Using Footnotes and Endnotes

Footnotes and **endnotes** provide additional information or references without interrupting the main text.

- **Footnote:** Appears at the bottom of the page containing the reference.
- **Endnote:** Appears at the end of a document or section.

How to Insert a Footnote

1. Place the insertion point after the text that needs a note.
2. Click the **References** tab.
3. Select **Insert Footnote**.
4. Word inserts a superscript reference number.
5. Type the note or citation at the bottom of the page.

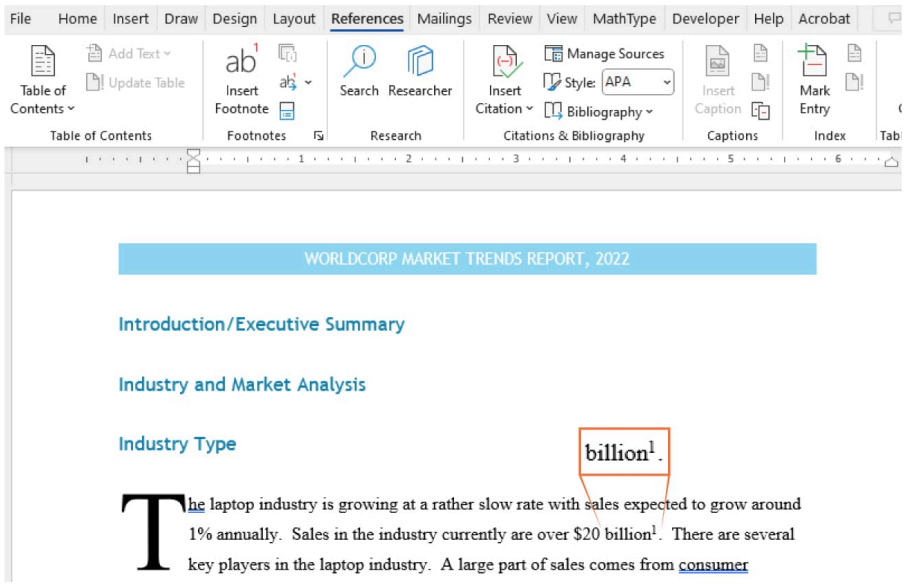


Figure 6. Inserting a Footnote Reference Number. Used with permission from Microsoft.

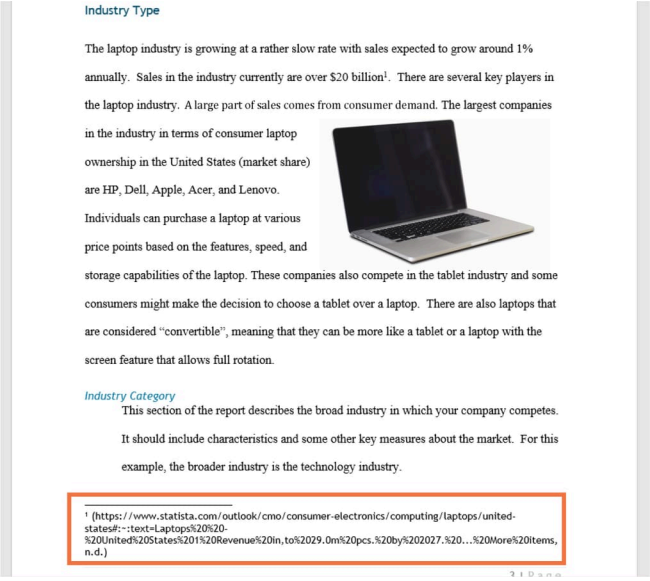


Figure 7. Example of a Footnote and Source Reference. Used with permission from Microsoft.

Formatting Footnotes

You can change the appearance of footnote text using Word's formatting and style tools.

For consistent formatting throughout a long document, modify the **Footnote Text** style rather than formatting each note separately.

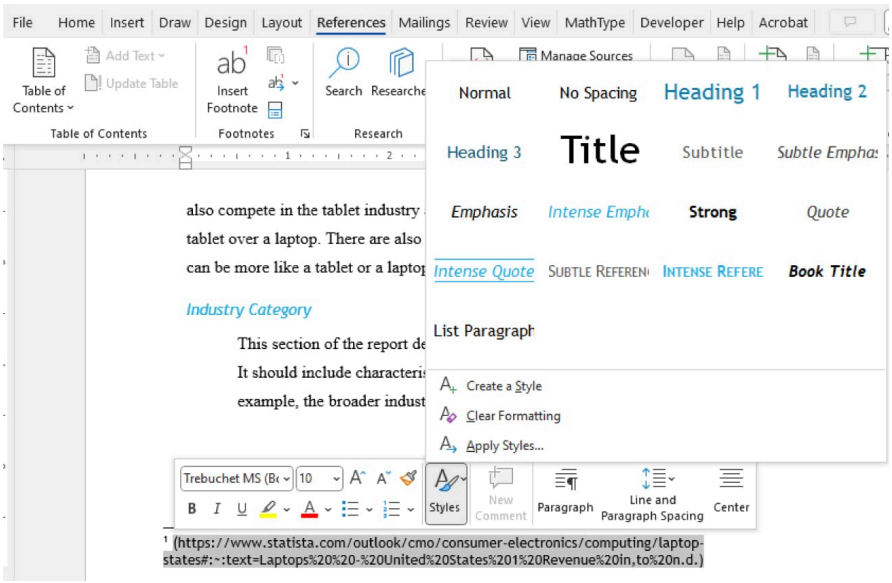


Figure 8. Formatting Footnote Text Using Styles. Used with permission from Microsoft.

How to Insert an Endnote

1. Place the insertion point after the text that needs a note.
2. Click the **References** tab.
3. Select **Insert Endnote**.
4. Type the note at the end of the document or section.

Footnote and endnote numbering formats can be customized through the Footnote and Endnote settings.

Creating a Table of Figures

A **table of figures** lists captioned images, charts, tables, or other visual elements in a document.

This feature is especially helpful in business reports that contain multiple graphs and data tables.

Adding Figure Captions

Before creating a table of figures, you must add captions using Word's Insert Caption command.

1. Select the image, chart, or table.
2. Click the **References** tab.
3. Select **Insert Caption**.
4. Choose an appropriate label, such as Figure or Table.
5. Enter a descriptive caption.
6. Select the caption position.
7. Click **OK**.

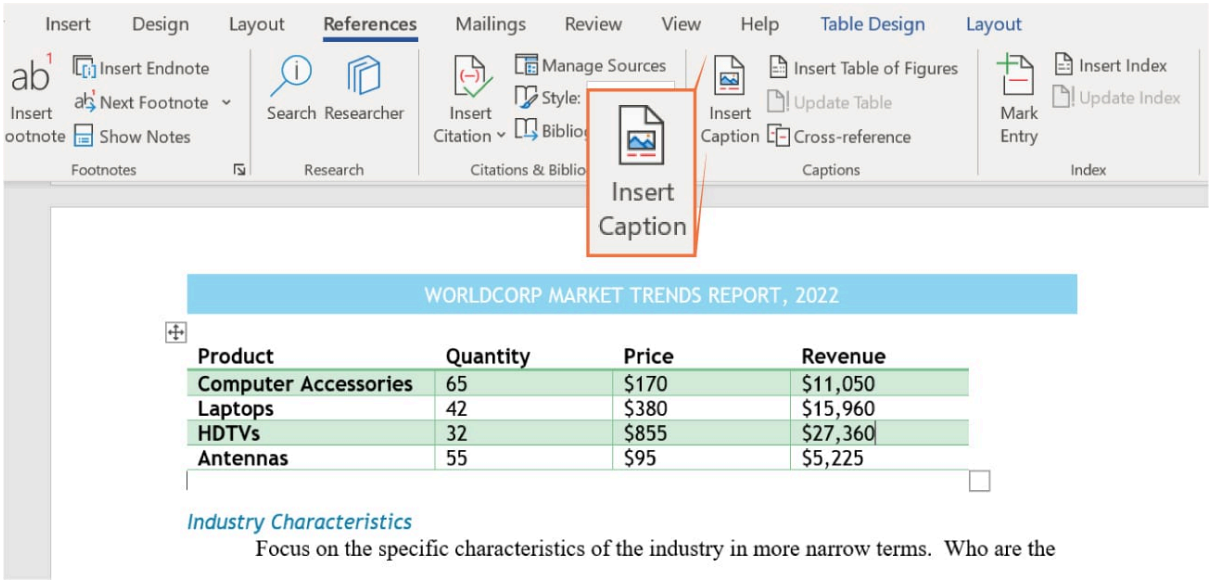


Figure 9. Inserting a Caption for a Table or Figure. Used with permission from Microsoft.

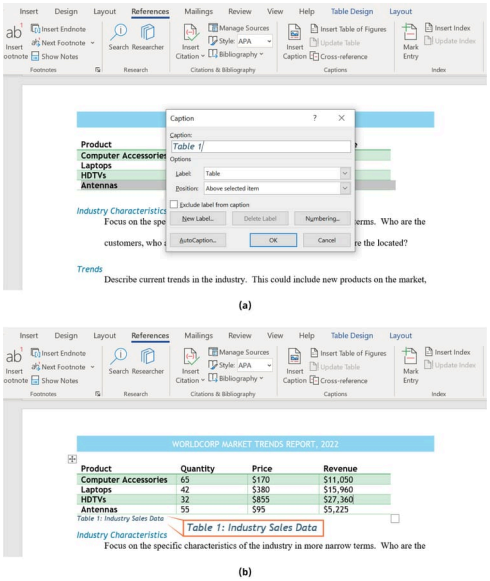


Figure 10. Customizing and Displaying a Figure Caption. Used with permission from Microsoft.

How to Insert a Table of Figures

1. Insert captions for all figures you want included.
2. Place the insertion point where the table of figures should appear.
3. Click the **References** tab.
4. Select **Insert Table of Figures**.
5. Choose the caption label and formatting options.
6. Click **OK**.

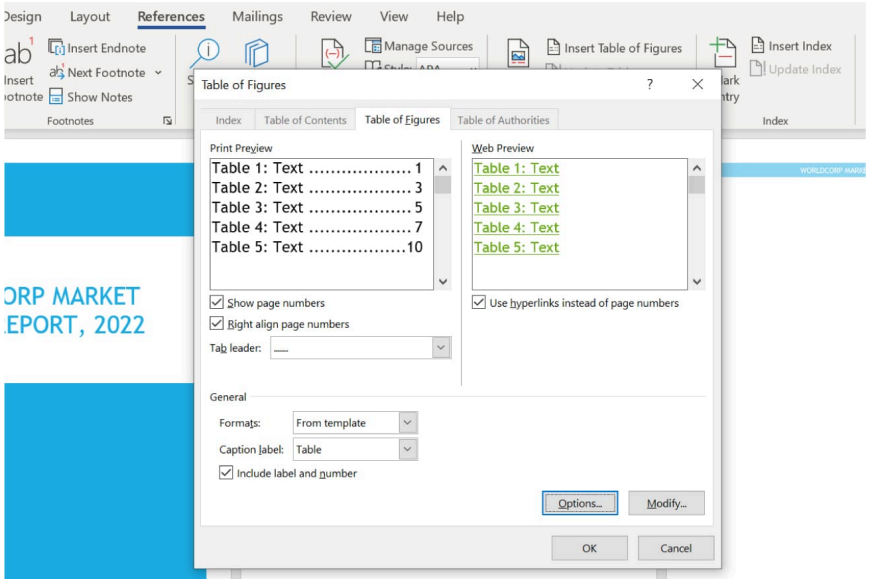


Figure 11. Table of Figures Formatting Options. Used with permission from Microsoft.

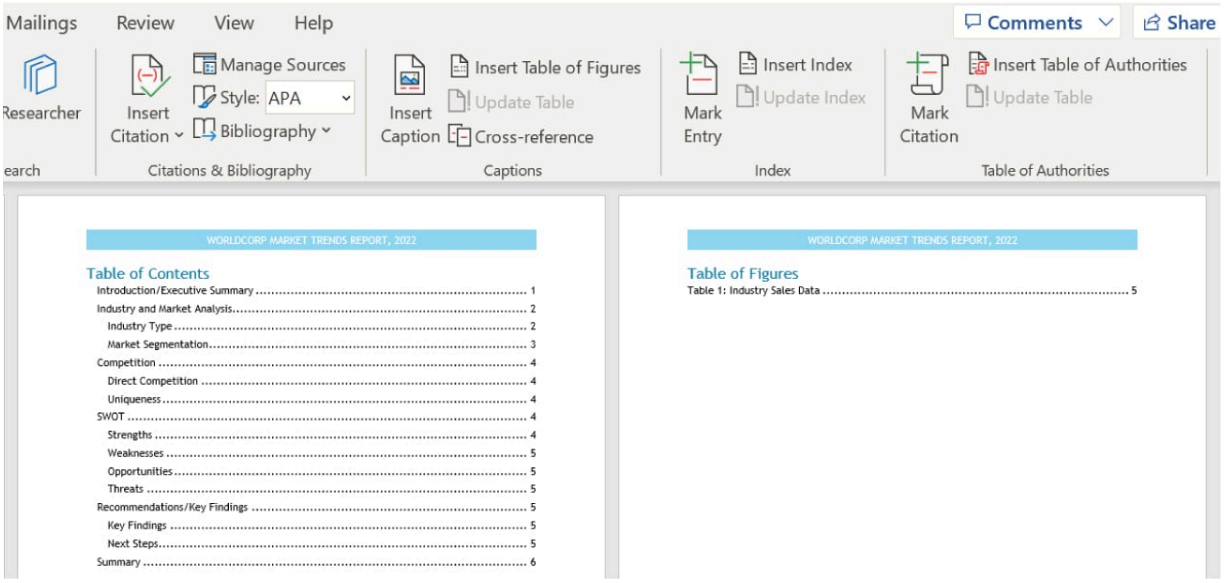


Figure 12. Comparing a Table of Contents and a Table of Figures. Used with permission from Microsoft.

Tip: After changing captions or moving figures, update the table of figures to keep the page numbers accurate.

Using Bookmarks for Document Navigation

A **bookmark** marks a location or selected text in a document so you can return to it quickly.

Bookmarks are useful in long documents where readers need to jump between sections.

How to Create a Bookmark

1. Place the insertion point at the location you want to bookmark, or select the text.
2. Click the **Insert** tab.
3. Select **Bookmark**.
4. Enter a descriptive bookmark name.
5. Click **Add**.

Tip: Bookmark names cannot contain spaces. Use a name such as **ExecutiveSummary** or **TableOfContents**.

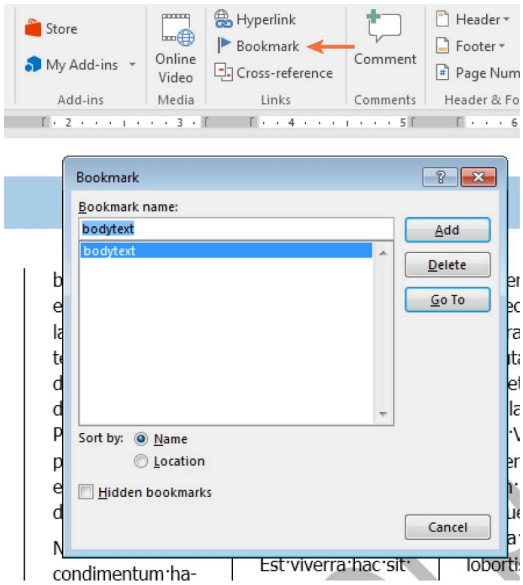


Figure 13. Creating a Bookmark in Microsoft Word. Used with permission from Microsoft.

Linking Text to a Bookmark

You can create a hyperlink that takes readers directly to a bookmark.

1. Select the text you want readers to click.
2. Right-click and select **Link**, or use **Insert > Link**.
3. Choose **Place in This Document**.
4. Select the bookmark.
5. Click **OK**.

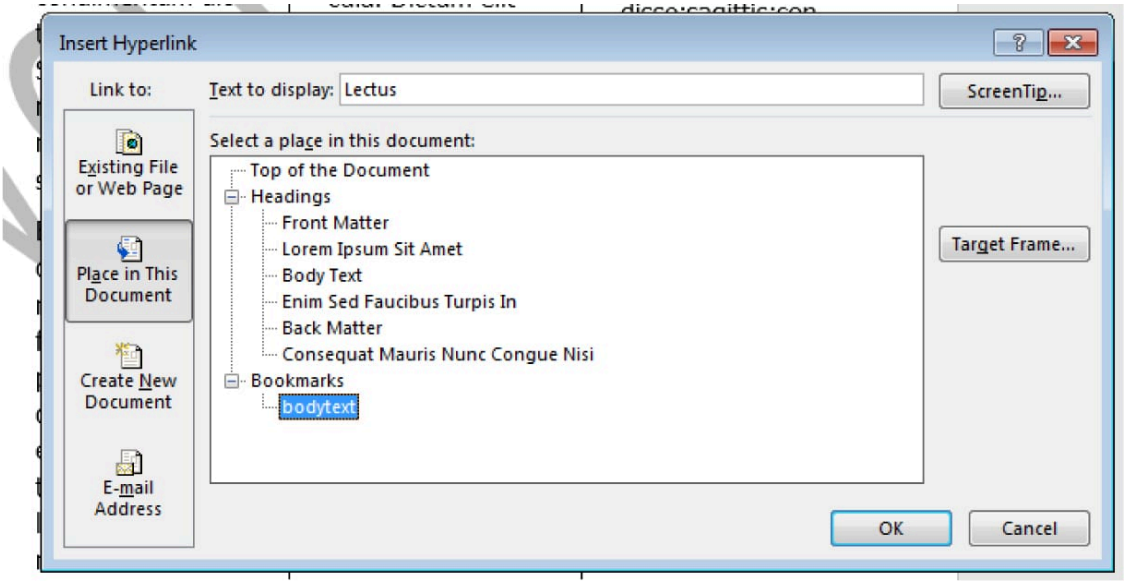


Figure 14. Creating a Hyperlink to a Bookmark. Used with permission from Microsoft.

Creating a Return Link to the Table of Contents

A helpful navigation feature is a link labeled **Go to Table of Contents** at the end of major sections.

This allows readers to return to the document outline without scrolling back through the report.

1. Place the insertion point at the beginning of the table of contents.
2. Select **Insert > Bookmark**.
3. Name the bookmark **TableOfContents**.
4. Click **Add**.
5. Go to the end of a major section.
6. Type **Go to Table of Contents**.
7. Select the text.
8. Open **Insert > Link**.
9. Choose **Place in This Document**.
10. Select the **TableOfContents** bookmark.
11. Click **OK**.

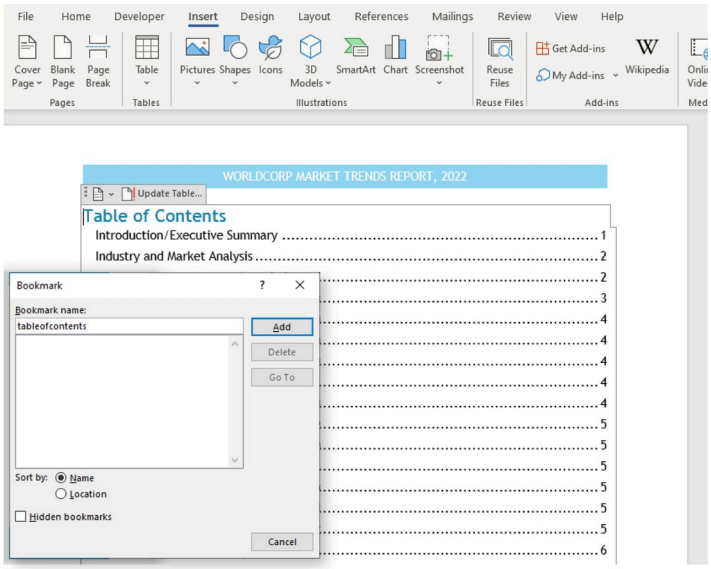


Figure 15. Bookmarking the Table of Contents. Used with permission from Microsoft.

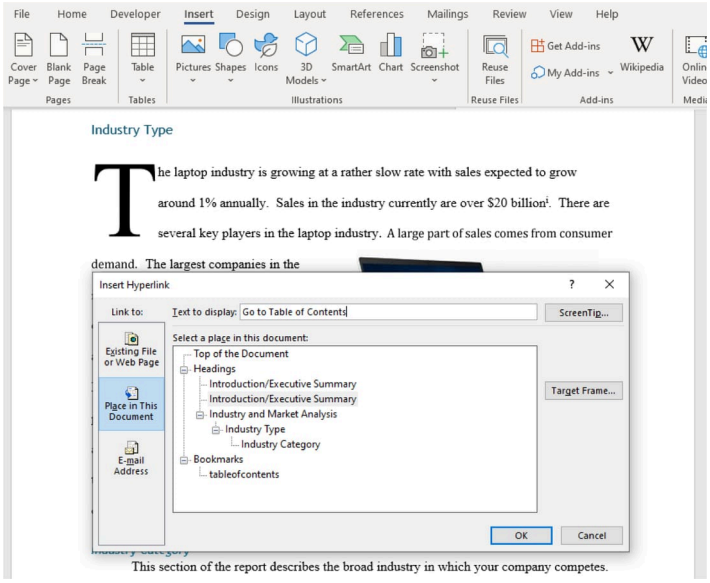


Figure 16. Linking Text to the Table of Contents Bookmark. Used with permission from Microsoft.

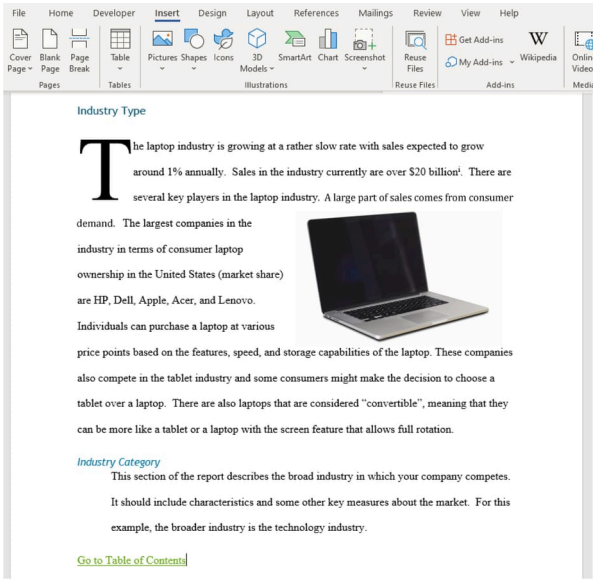


Figure 17. Example of a Return Link to the Table of Contents. Used with permission from Microsoft.

Academic Integrity and Source Attribution

When creating reports, research papers, or other documents, it is important to give credit to the original creators of information, images, and research.

Academic integrity means completing your work responsibly and acknowledging the contributions of others.

Plagiarism occurs when someone presents another person's work or ideas as their own without proper acknowledgment.

To maintain academic integrity:

- Cite information obtained from other sources.
- Use quotation marks when directly quoting someone else's words.
- Paraphrase information in your own words and provide a citation.
- Credit the creators of images, charts, and data.
- Follow the citation style required by your instructor or organization.

Real-World Application: Business Research

Imagine you are preparing the WorldCorp market trends report and use sales information from an industry research publication.

You should identify the source of that information and include an appropriate citation.

Proper citations allow readers to verify the information and recognize the work of the original researchers.

Practice: Organizing a Long Business Report

Purpose: Practice using Microsoft Word's document organization and navigation tools.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Insert a cover page with the title **WorldCorp Market Trends Report**.
3. Add your name and the current date.

4. Create the following sections:
    - Executive Summary
    - Industry and Market Analysis
    - Competition
    - Recommendations
    - Conclusion
5. Apply the **Heading 1** style to each section heading.
6. Write two or three sentences under each heading.
7. Insert page breaks so each major section begins on a new page.
8. Use **Format Painter** to copy formatting between two selected pieces of text.
9. Insert an automatic table of contents after the cover page.
10. Add a footnote to one sentence in the report.
11. Insert a small table or chart and add a caption using **Insert Caption**.
12. Create a table of figures.
13. Create a bookmark for the table of contents.
14. Add a **Go to Table of Contents** hyperlink near the end of the report.
15. Update the table of contents and table of figures.
16. Review the document for organization, readability, and correct formatting.
17. Save the document as **Managing_Long_Documents_Practice.docx**.

Key Takeaways

- Page breaks, blank pages, and cover pages help organize documents.
- Format Painter copies formatting between text selections.
- Tables of contents allow readers to navigate document headings.
- Footnotes and endnotes provide supporting information and references.
- Figure captions allow Word to generate a table of figures.
- Bookmarks and hyperlinks improve navigation within long documents.
- Proper source attribution supports academic integrity and professional writing.

Source Attribution

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The material has been reorganized, clarified, and expanded for Word for Windows at Lemoore College. Original source licensing and attribution requirements must be verified and retained.

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6: CHAPTER 6- CUSTOMIZING AND ENHANCING DOCUMENTS

6.1: Microsoft Word- Advanced Formatting Features
6.2: Creating Different Document Types in Microsoft Word

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6.1: Microsoft Word- Advanced Formatting Features

Learning Objectives

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

- **Explore** advanced configuration settings in Microsoft Word.
- **Customize** proofreading, display, and privacy options.
- **Insert** and format page numbers in professional documents.
- **Create** headers and footers with consistent formatting.
- **Apply** numbered, bulleted, and multilevel lists.
- **Organize** a business report using appropriate heading styles.

Introduction to Advanced Formatting

Microsoft Word includes advanced formatting features that help you create professional and organized documents.

These tools are especially useful when working with business reports, research papers, proposals, and other documents containing multiple sections.

Imagine that you work for WorldCorp and your supervisor has asked you to improve a market trends report.

Your report needs professional headings, page numbers, headers, footers, and lists to help readers understand the information.

In this section, you will learn how to use Word's advanced formatting tools to improve the appearance and organization of your documents.

Preparing the WorldCorp Market Trends Report

Before exploring advanced formatting features, create or open the WorldCorp market trends report.

The report should contain the following major sections:

- Introduction/Executive Summary
- Industry and Market Analysis
- Competition
- SWOT
- Recommendations/Key Findings
- Summary

You may apply a professional document theme using the **Design** tab.

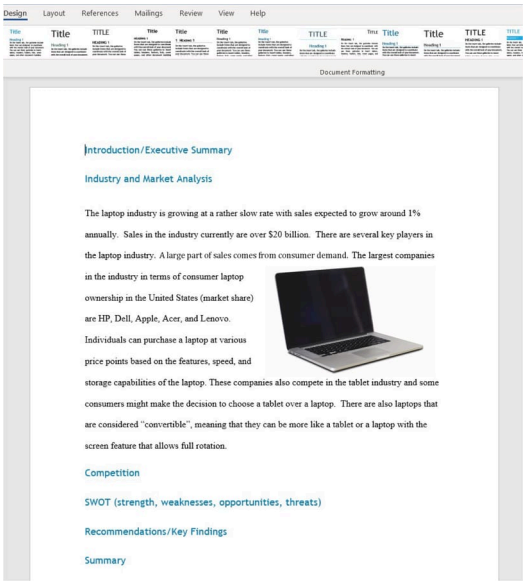


Figure 1. Example of a Professionally Formatted Business Report. Used with permission from Microsoft.

Exploring Advanced Configuration Settings

Microsoft Word allows users to customize how the program works.

These settings can help improve productivity, proofreading, document appearance, and privacy.

Opening Word Options

1. Open Microsoft Word.
2. Click the **File** tab.
3. Select **Options**.
4. Review the available settings in the Word Options window.
5. Select a category to explore its settings.

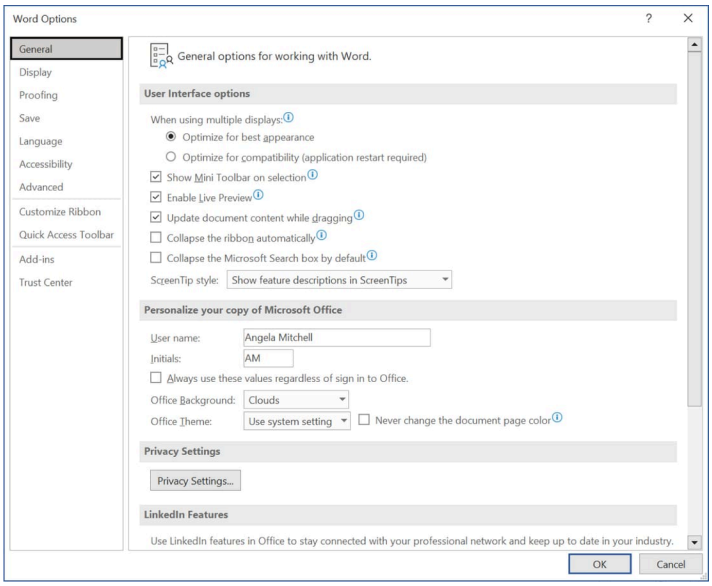


Figure 2. Exploring the Word Options Window. Used with permission from Microsoft.

Mac Tip

In Microsoft Word for Mac, many application settings are available through **Word > Preferences** or **Word > Settings**, depending on the version.

General Settings

The **General** category includes settings related to your Word experience and user information.

For example, you may be able to customize the user name associated with comments and tracked changes.

This is useful when collaborating with coworkers on a shared business report.

Display Settings

The **Display** category controls how certain elements appear on your screen.

One helpful feature is the ability to display **formatting marks**.

Formatting marks show hidden elements such as:

- Paragraph marks
- Spaces
- Tabs
- Manual line breaks
- Other nonprinting formatting characters

These marks can help you identify unnecessary spaces or paragraph breaks.

Quick Tip: On the Home tab, select the **Show/Hide (¶)** button to display or hide formatting marks.

Proofing Settings

The **Proofing** category includes tools for checking spelling, grammar, and automatic corrections.

Word can identify possible errors and suggest improvements.

You can also create custom dictionaries containing specialized vocabulary.

Adding Words to a Custom Dictionary

For example, Word may not recognize a company name such as **WorldCorp**.

1. Type the specialized word in your document.
2. Right-click the word if Word identifies it as a possible spelling error.
3. Review the spelling suggestions.
4. Select **Add to Dictionary**, if available.
5. Confirm that the word is spelled correctly.

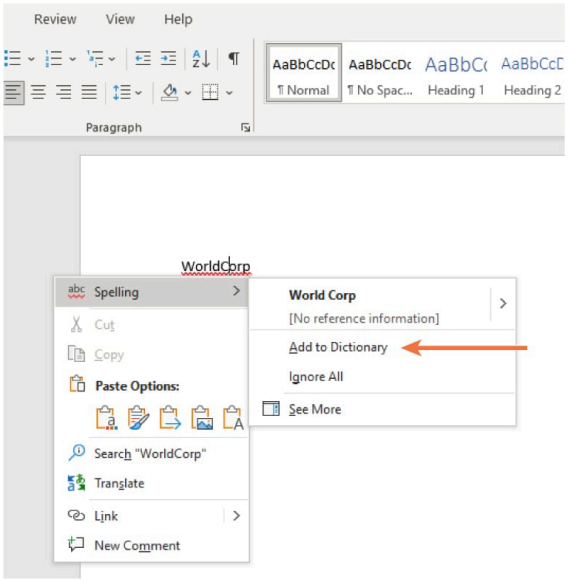


Figure 3. Adding Specialized Words to a Custom Dictionary. Used with permission from Microsoft.

Important: Word saves the spelling exactly as entered. Always check the spelling before adding a word to your dictionary.

Advanced Settings

The **Advanced** category includes additional settings for editing, formatting, displaying, printing, and working with images.

Examples include:

- Editing preferences
- Cut, copy, and paste behavior
- Image size and quality
- Document display options
- Printing settings
- Layout and compatibility settings

These options allow you to customize Word based on your work needs.

Customizing the Quick Access Toolbar

The **Quick Access Toolbar** provides convenient access to commonly used commands.

Depending on your Word version and settings, it may contain commands such as Save, Undo, and Redo.

You can customize the toolbar to include additional commands that you use frequently.

Trust Center and Document Privacy

The **Trust Center** contains security and privacy settings.

These options are important when working with business documents containing confidential information.

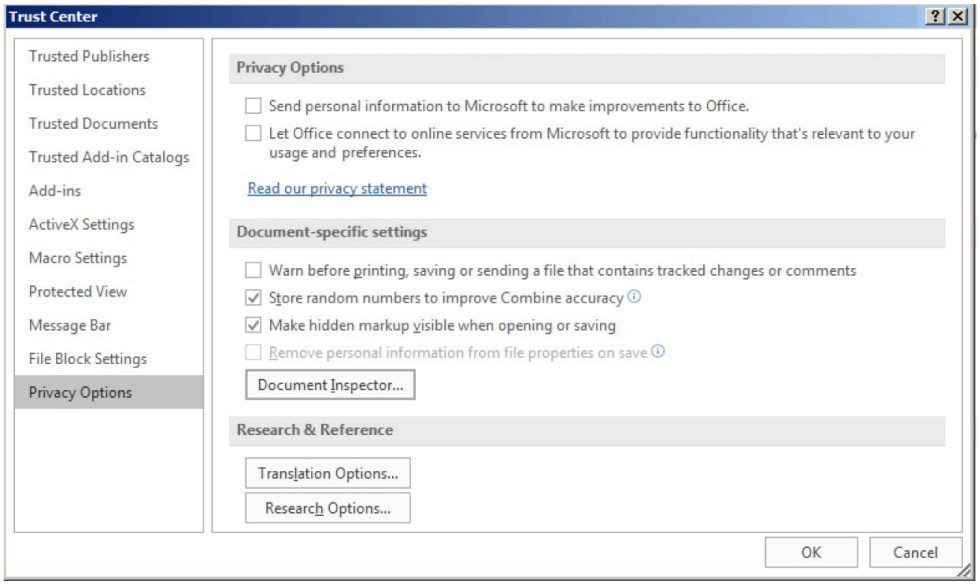


Figure 4. Reviewing Privacy Settings in the Trust Center. Used with permission from Microsoft.

Using Document Inspector

Document Inspector helps identify hidden information that may be stored in a Word file.

This information may include:

- Document properties
- Personal information
- Comments
- Tracked changes
- Hidden content

How to Inspect a Document

1. Save a copy of your document before making changes.
2. Click **File**.
3. Select **Info**.
4. Choose **Check for Issues**.
5. Select **Inspect Document**.
6. Choose the information categories to inspect.
7. Click **Inspect**.
8. Review the results before removing any information.

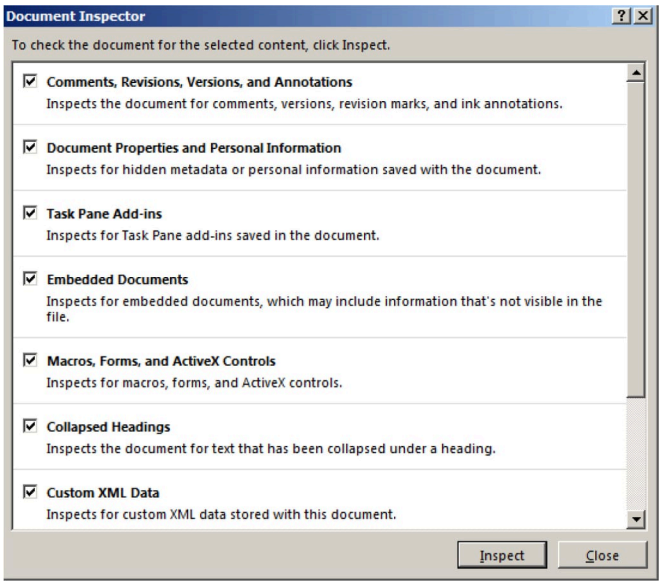


Figure 5. Using Document Inspector to Review Hidden Information. Used with permission from Microsoft.

Important: Removing document information may permanently delete comments, tracked changes, or other content from the copy being edited. Always inspect the results carefully.

Inserting and Formatting Page Numbers

Page numbering automatically adds page numbers to a document.

Page numbers help readers navigate reports, proposals, manuals, and research papers.

Word allows you to place page numbers at the top, bottom, or margins of a page, or at the current insertion point.

How to Insert Page Numbers

1. Click the **Insert** tab.
2. Locate the **Header & Footer** group.
3. Select **Page Number**.
4. Choose a location, such as **Bottom of Page**.
5. Select a page number style.
6. Review the page numbering throughout your document.

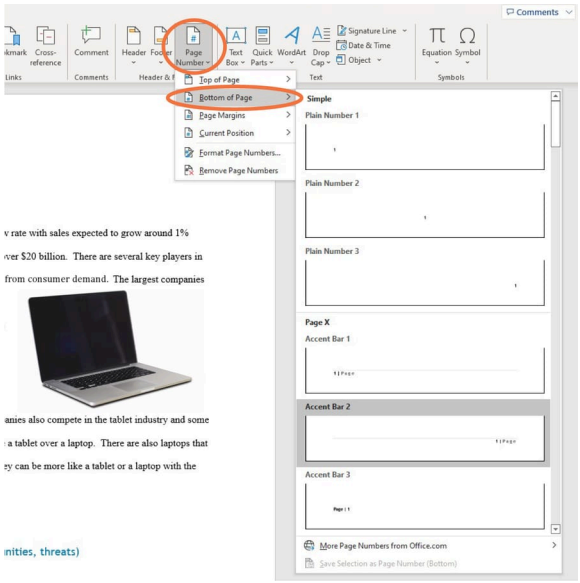


Figure 6. Selecting a Page Number Style. Used with permission from Microsoft.

Customizing Page Numbers

Depending on your document's needs, you can:

- Choose a different numbering format.
- Restart numbering in a new section.
- Continue numbering from a previous section.
- Hide the page number on the first page.
- Place numbers in different locations.

For example, a business report may have a cover page without a visible page number.

To hide the page number on the first page, open the header or footer area and select **Different First Page**.

Creating Headers and Footers

A **header** is an area at the top of a page that can contain repeated information.

A **footer** is an area at the bottom of a page.

Common header and footer information includes:

- Document title
- Company name
- Department name
- Date
- Page numbers
- Company contact information

How to Insert a Header

1. Click the **Insert** tab.
2. Select **Header**.
3. Choose a built-in design.
4. Enter the information you want displayed.
5. Review the appearance of the header.

6. Select **Close Header and Footer** when finished.

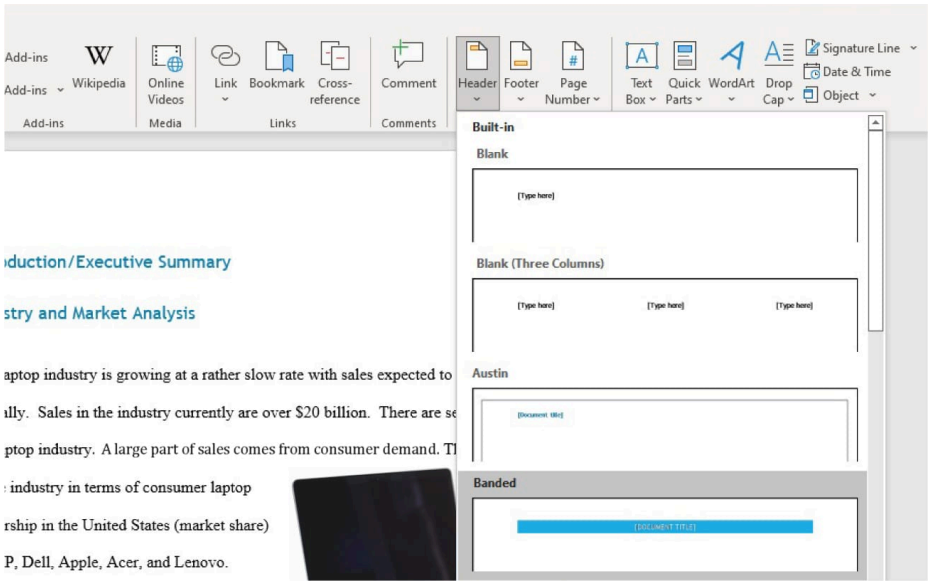


Figure 7. Choosing a Header Design. Used with permission from Microsoft.

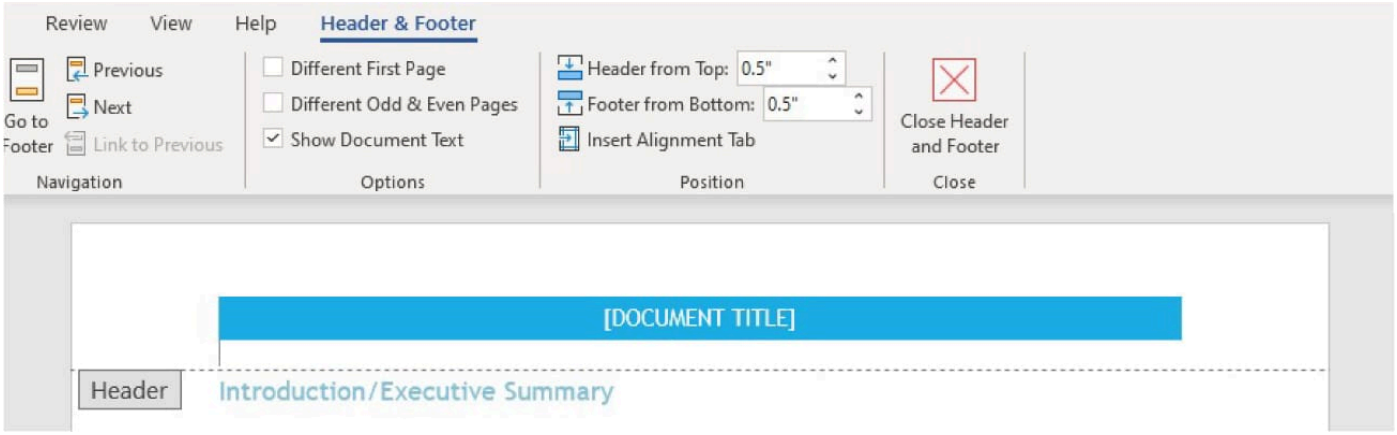


Figure 8. Editing a Document Header. Used with permission from Microsoft.

Adding Information to a Header

You can type directly into the header area.

For the WorldCorp report, you might include:

WorldCorp Market Trends Report

You can also insert certain document properties, such as the author or company name, when supported by your Word version.

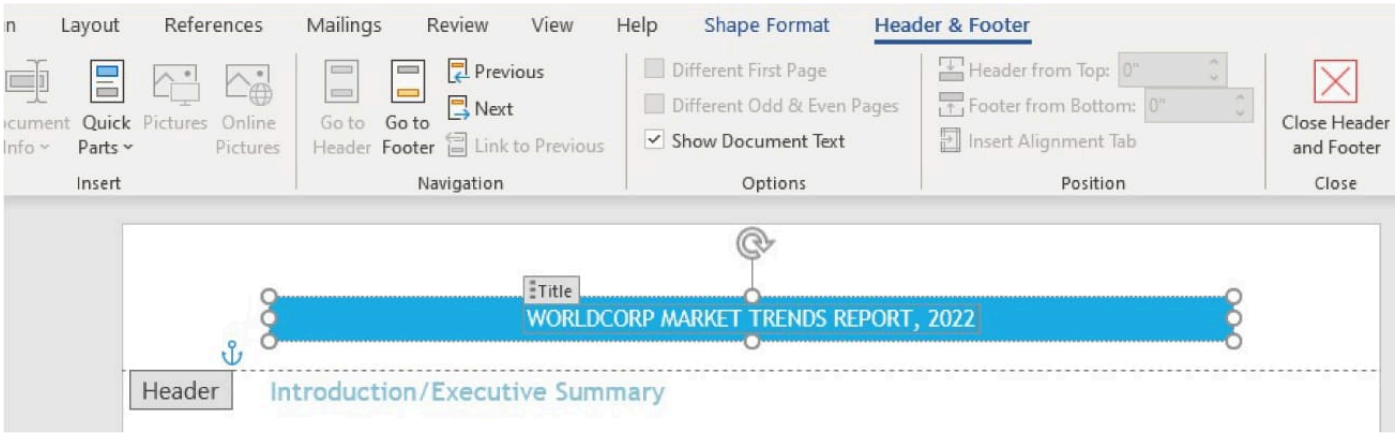


Figure 9. Typing Information into a Header. Used with permission from Microsoft.

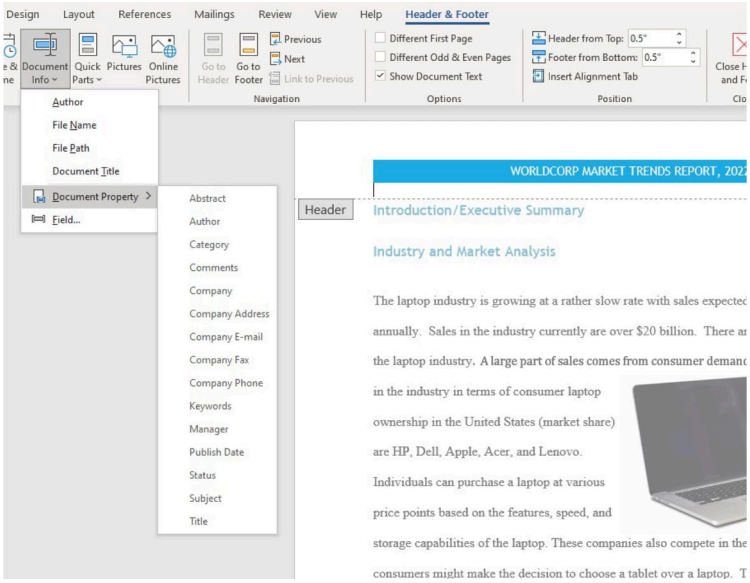


Figure 10. Inserting Document Properties into a Header. Used with permission from Microsoft.

How to Insert a Footer

1. Click the **Insert** tab.
2. Select **Footer**.
3. Choose a footer design.
4. Enter the information you want displayed.
5. Add a page number if needed.
6. Close the header and footer editing area.

Different First Page and Odd/Even Pages

Word allows you to customize headers and footers for different pages.

- **Different First Page:** Creates a separate header or footer for the first page.
- **Different Odd & Even Pages:** Allows different headers or footers on odd-numbered and even-numbered pages.

These options are useful in professional reports, books, and other long documents.

Creating and Formatting Lists

Lists help organize information and make documents easier to read.

Microsoft Word supports several list formats, including:

- Numbered lists
- Lettered lists
- Bulleted lists
- Multilevel lists

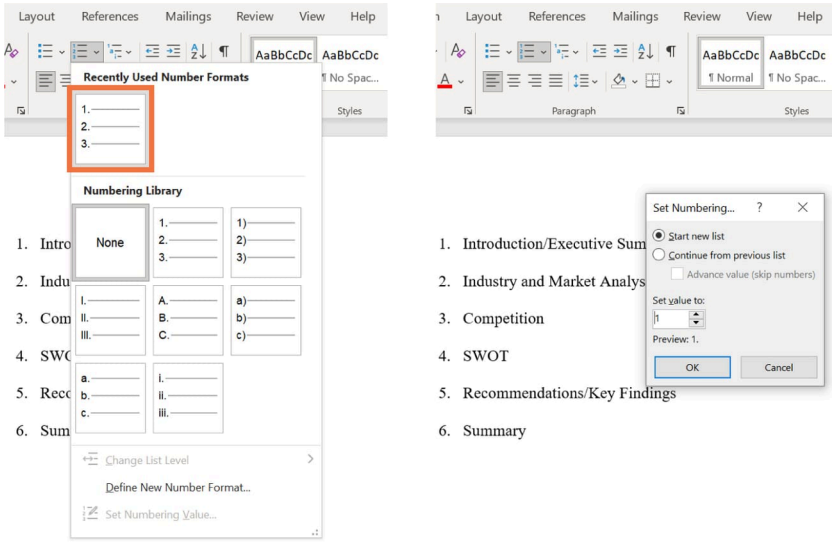
Numbered and Lettered Lists

Numbered lists are useful when items must follow a specific sequence.

Lettered lists can organize options, categories, or supporting points.

How to Create a Numbered or Lettered List

1. Type the items you want to include.
2. Select the text.
3. Click the **Home** tab.
4. Select the **Numbering** drop-down menu.
5. Choose a numbering or lettering style.
6. Review the list formatting.



(a) (b)

Figure 11. Formatting Numbered and Lettered Lists. Used with permission from Microsoft.

Word also allows you to restart numbering or continue numbering from an earlier list.

Bulleted Lists

Bulleted lists are useful when items do not need to appear in a specific order.

For example, a business report might use bullets to summarize:

- Major competitors
- Customer needs

- Market opportunities
- Business challenges

How to Create a Bulleted List

1. Type the list items.
2. Select the text.
3. Click the **Home** tab.
4. Select the **Bullets** drop-down menu.
5. Choose a bullet style.

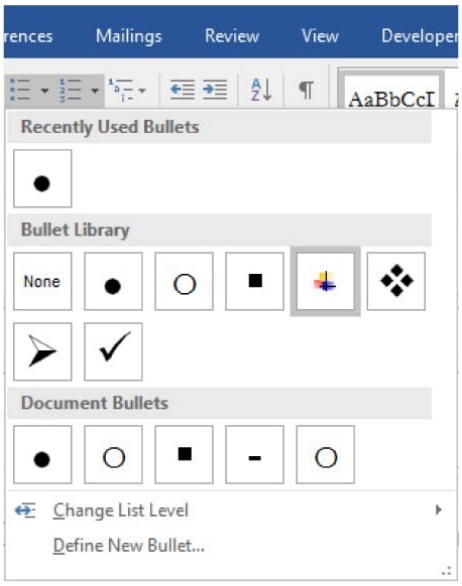


Figure 12. Choosing a Bulleted List Style. Used with permission from Microsoft.

Multilevel Lists

A **multilevel list** organizes information into different levels of importance.

Multilevel lists are useful for creating outlines, business plans, and reports.

For example, the WorldCorp report could contain:

1. Introduction/Executive Summary
2. Industry and Market Analysis
    1. Industry Type
    2. Industry Category
    3. Industry Characteristics
    4. Market Segmentation
3. Competition
    1. Direct Competitors
    2. Uniqueness
4. SWOT
    1. Strengths
    2. Weaknesses
    3. Opportunities
    4. Threats
5. Recommendations/Key Findings
6. Summary

How to Create a Multilevel List

1. Type your list items.
2. Select the entire list.
3. Click the **Home** tab.
4. Select **Multilevel List**.
5. Choose a list style.
6. Place the insertion point within an item that should be a sublevel.
7. Use **Increase Indent** or the appropriate list-level command to move it to a lower level.
8. Repeat for additional sublevels.

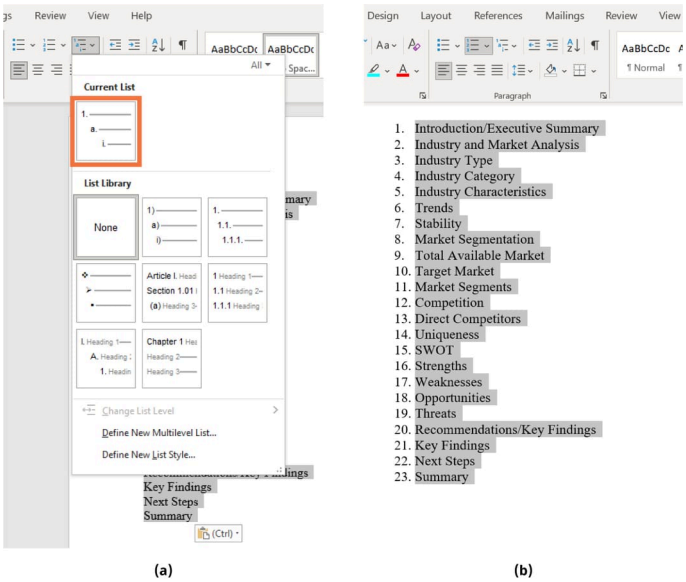


Figure 13. Selecting a Multilevel List Format. Used with permission from Microsoft.

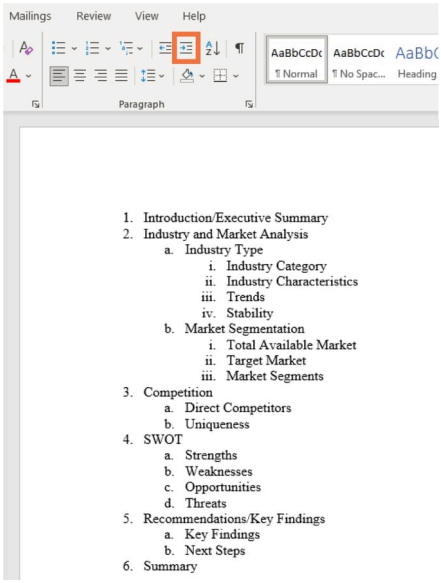


Figure 14. Example of a Multilevel Business Report Outline. Used with permission from Microsoft.

Using Heading Styles with Your Outline

After creating an outline, apply Word's built-in heading styles to the actual report.

For example:

- **Heading 1:** Major report sections.
- **Heading 2:** Main subsections.
- **Heading 3:** Smaller topics within subsections.

Heading styles improve consistency and help Word create an automatic table of contents.

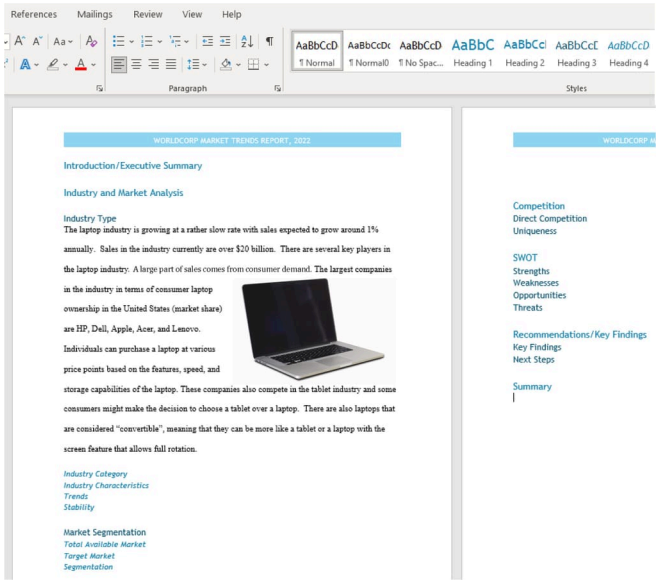


Figure 15. Using Heading Styles to Organize a Business Report. Used with permission from Microsoft.

Link to Learning

Microsoft Word features and menus may change as the software is updated. Visit Microsoft's support resource for advanced Word settings to explore additional guidance.

Practice: Formatting a Professional Business Report

Purpose: Apply advanced Microsoft Word formatting features to create an organized business report.

Instructions:

1. Open Microsoft Word and create a blank document.
2. Type the title **WorldCorp Market Trends Report**.
3. Create the following major headings:
    - Introduction/Executive Summary
    - Industry and Market Analysis
    - Competition
    - SWOT
    - Recommendations/Key Findings
    - Summary
4. Apply the **Heading 1** style to the major headings.
5. Write two or three sentences under each heading.
6. Apply a professional document theme.
7. Insert page numbers at the bottom of the document.
8. Hide the page number on the first page.
9. Insert a header containing **WorldCorp Market Trends Report**.
10. Insert a footer containing your name.
11. Create a bulleted list of at least four market trends.
12. Create a numbered list of at least four business recommendations.
13. Create a multilevel list outlining the major report sections and their subtopics.

14. Use the **Show/Hide (¶)** feature to review formatting marks.
15. Run **Document Inspector** and review the results without removing any information.
16. Review the report for readability and consistent formatting.
17. Save the document as **Advanced_Formatting_Practice.docx**.

Key Takeaways

- Word Options allows users to customize application settings.
- Proofing tools help identify spelling and grammar errors.
- Document Inspector can identify hidden document information.
- Page numbers help readers navigate professional documents.
- Headers and footers display information throughout a document.
- Numbered and bulleted lists organize information clearly.
- Multilevel lists help structure complex information.
- Heading styles support consistent formatting and document navigation.

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6.2: Creating Different Document Types in Microsoft Word

Learning Objectives

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

- **Create** and customize Microsoft Word templates.
- **Prepare** professional business memos and newsletters.
- **Design** business letterheads and envelopes.
- **Create** business cards, brochures, and flyers.
- **Develop** invoices and business plans using templates.
- **Prepare** professional résumés and cover letters.
- **Apply** consistent formatting and branding across business documents.

Introduction to Professional Business Documents

Microsoft Word allows you to create many different types of professional documents.

Businesses use these documents to communicate information, promote products and services, organize financial transactions, and apply for opportunities.

Examples include:

- Business memos and newsletters
- Letterheads and envelopes
- Business cards
- Brochures and flyers
- Invoices
- Business plans
- Résumés and cover letters

Instead of creating each document from scratch, you can use a **template** to save time and maintain a consistent appearance.

Using Microsoft Word Templates

A **template** is a predesigned document containing formatting, layouts, and placeholders that you can customize.

Templates are useful because they help you create professional documents without having to design every element yourself.

How to Find a Template

1. Open Microsoft Word.
2. Click **File**.
3. Select **New**.
4. Use the search bar to enter a document type, such as **business memo** or **invoice**.
5. Review the available templates.
6. Select a template and choose **Create**.
7. Replace the sample information with your own content.

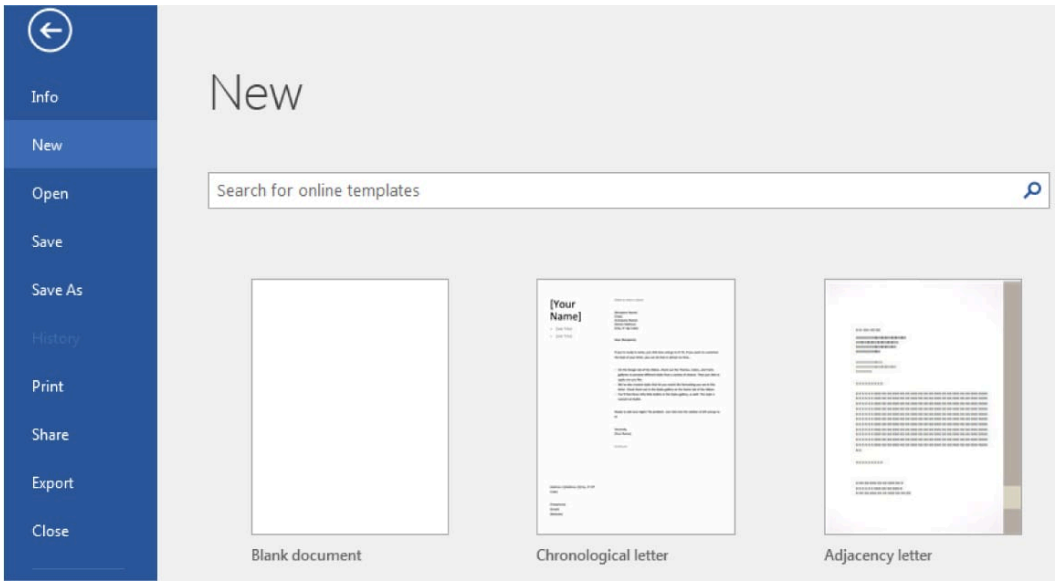


Figure 1. Searching for Templates in Microsoft Word. Used with permission from Microsoft.

Creating Your Own Template

You can also save a document as a reusable template.

1. Create a document with the formatting and layout you want.
2. Click **File > Save As**.
3. Choose a location to save the file.
4. Under file type, select **Word Template (*.dotx)**.
5. Enter a descriptive file name.
6. Click **Save**.

The **.dotx** format is used for Word templates, while **.docx** is used for standard Word documents.

When you create a new document from your template, save your completed work as a separate .docx file so the original template remains available for future use.

Helpful Tip

When downloading templates from websites, choose trusted sources and confirm that the files are compatible with Microsoft Word.

Visit Microsoft's template resource to explore additional options.

Creating Business Memos

A **business memo** is a short, professional document used to communicate information within an organization.

Memos are commonly used to:

- Announce changes to company policies.
- Share important updates.
- Explain new procedures.
- Request action from employees.
- Communicate project information.

Common Parts of a Business Memo

Most business memos include:

- **To:** The person or group receiving the memo.
- **From:** The person sending the memo.
- **Date:** The date the memo is prepared.
- **Subject:** A short description of the memo's purpose.
- **Message:** The main information being communicated.

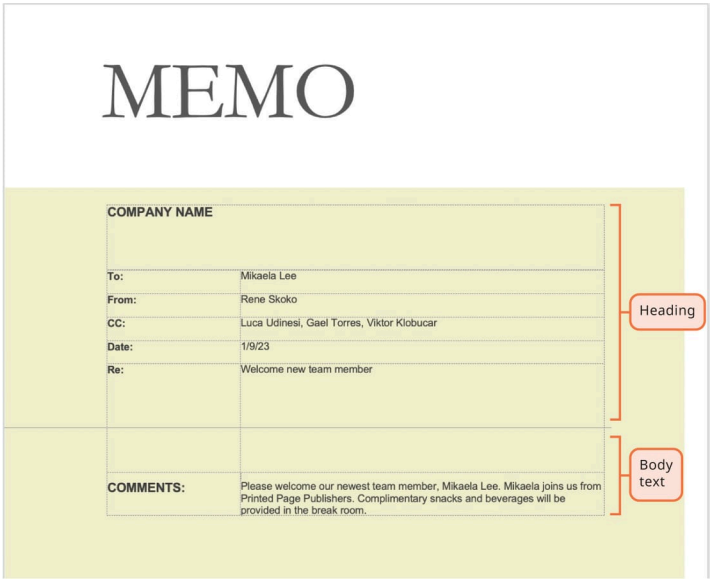


Figure 2. Example of a Professional Business Memo. Used with permission from Microsoft.

How to Create a Business Memo

1. Open Microsoft Word.
2. Search for a **Memo** template.
3. Select a professional design.
4. Enter the recipient, sender, date, and subject.
5. Write a short introduction explaining the purpose of the memo.
6. Provide the main information in the body.
7. End with a clear closing statement or requested action.
8. Review the memo for clarity and professionalism.
9. Save the document as a Word file.

Creating Business Newsletters

A **newsletter** shares information, updates, announcements, or promotional content with a group of readers.

Newsletters may be distributed internally to employees or externally to customers and community members.

They often include:

- Headlines and section titles
- Short articles
- Images or graphics
- Company updates
- Upcoming events
- Contact information

To create a newsletter, search for a **Newsletter** template in Word, replace the sample content, and customize the images and colors.

Link to Learning

For additional guidance, explore this step-by-step newsletter writing resource.

Creating Business Letterheads

A **letterhead** is a professional heading that identifies a business or individual.

Letterheads commonly include:

- Company or individual name
- Business logo
- Mailing address
- Phone number
- Email address
- Website

Letterheads help create a consistent professional appearance across business communications.

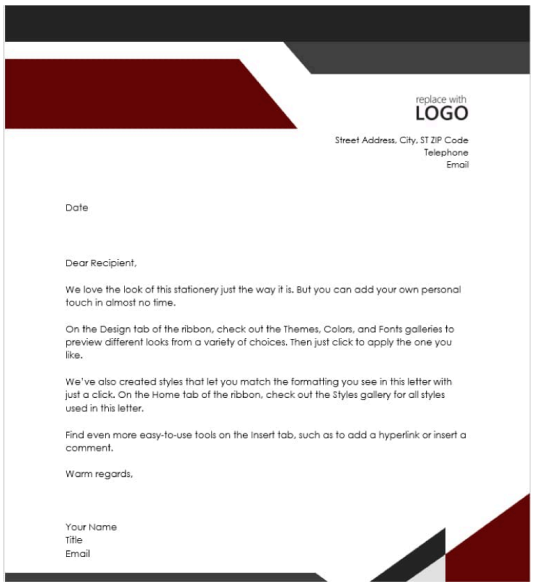


Figure 3. Example of a Business Letterhead Template. Used with permission from Microsoft.

How to Create a Letterhead

1. Open Microsoft Word.
2. Search for a **Letterhead** template.
3. Choose a professional design.
4. Replace the sample company information.
5. Insert a logo if appropriate.
6. Customize the font and color scheme.
7. Save the document as a reusable Word template if needed.

Creating and Printing Envelopes

Microsoft Word includes tools for preparing professional mailing envelopes.

Envelopes normally contain:

- **Return Address:** The sender's mailing information.
- **Delivery Address:** The recipient's mailing information.

Setting Up a Return Address

You can save a return address in Word for Windows so it appears automatically when creating envelopes.

1. Click **File > Options**.
2. Select **Advanced**.
3. Locate the **General** section.
4. Enter your mailing address in the **Mailing Address** field.
5. Click **OK**.

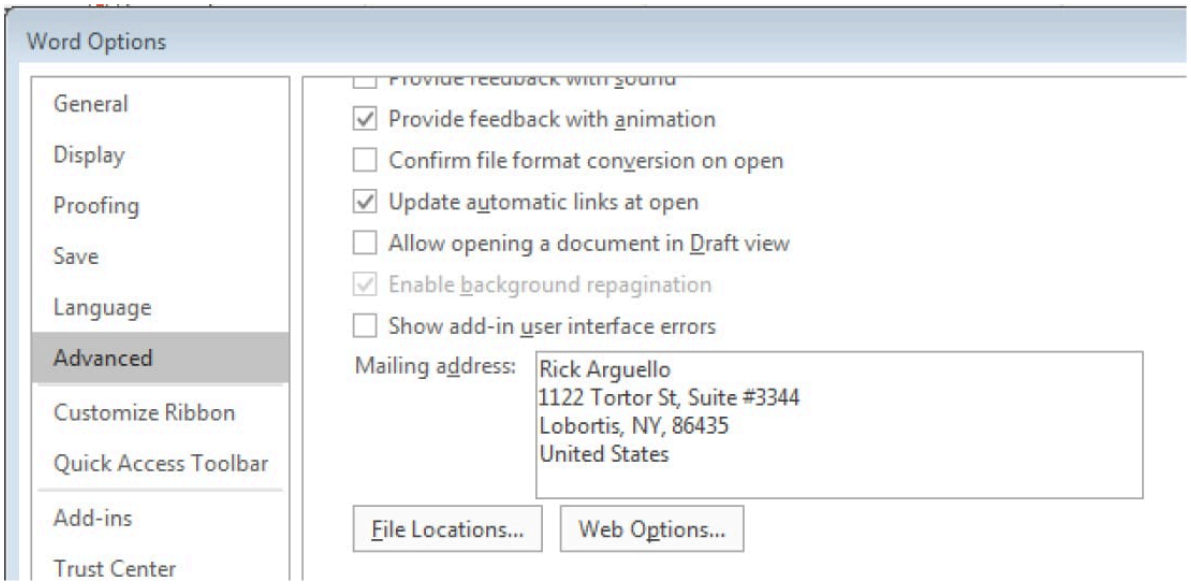


Figure 4. Saving a Return Address in Word. Used with permission from Microsoft.

How to Create an Envelope

1. Click the **Mailings** tab.
2. Select **Envelopes**.
3. Enter the recipient's delivery address.
4. Review or enter the return address.
5. Click **Options** to select the envelope size.
6. Review the printer feed settings.
7. Select **Add to Document** or **Print**, depending on your needs.

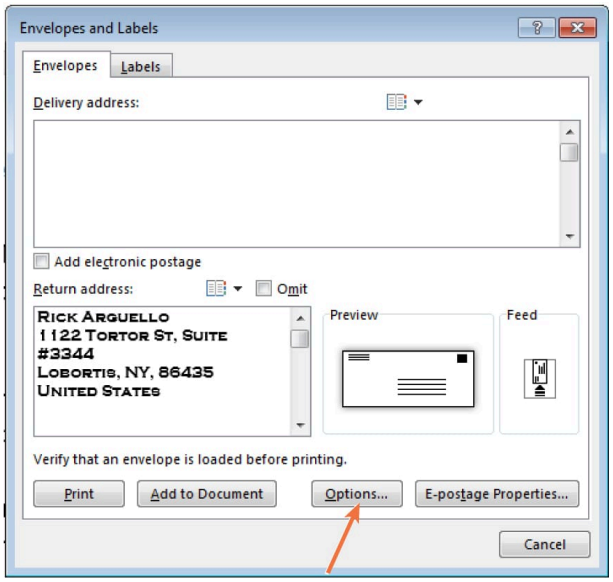


Figure 5. Entering Envelope Addresses. Used with permission from Microsoft.

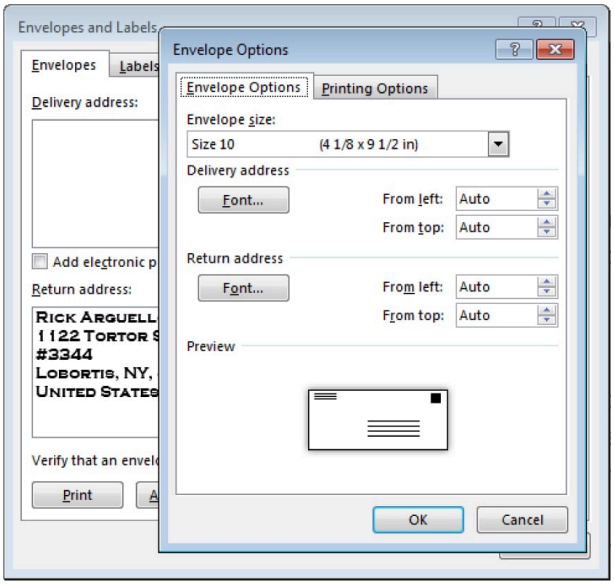


Figure 6. Customizing Envelope Size and Layout. Used with permission from Microsoft.



Figure 7. Example of a Completed Mailing Envelope. Used with permission from Microsoft.

Printing Tip

Before printing, check your printer's instructions to confirm the correct envelope orientation and paper feed settings.

Creating Business Cards

A **business card** is a small printed card that provides professional contact information.

Business cards are commonly used for networking and connecting with potential customers or employers.

They may include:

- Name
- Job title
- Company name
- Phone number
- Email address
- Website
- Company logo

How to Create a Business Card

1. Open Microsoft Word.
2. Search for a **Business Card** template.
3. Select a design that fits your professional needs.
4. Replace the sample information.
5. Insert a company logo if appropriate.
6. Review the font size and readability.
7. Save the completed design.
8. Print on compatible cardstock or export a PDF for professional printing.

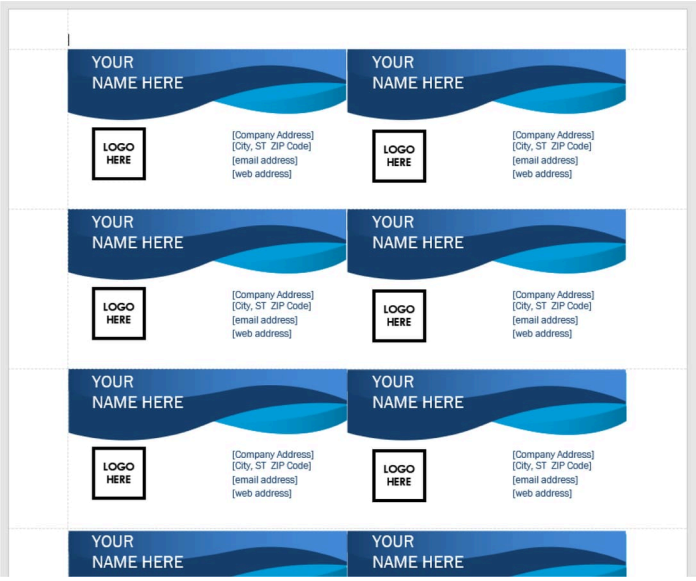


Figure 8. Example of a Business Card Template. Used with permission from Microsoft.

Tip: Some business card templates automatically repeat the information entered on the first card. Others require you to update each card individually.

Creating Brochures and Flyers

Brochures and **flyers** are promotional documents used to communicate information about businesses, products, services, and events.

A **brochure** usually contains multiple sections or panels and provides detailed information.

A **flyer** is typically a single-page document designed to communicate a short message or announcement.

Creating a Brochure

Many brochures use a **trifold layout**, which divides the page into three panels.

For example, WorldCorp might create a brochure advertising a company toy drive.



Figure 9. Example of a Trifold Brochure Layout. Used with permission from Microsoft.

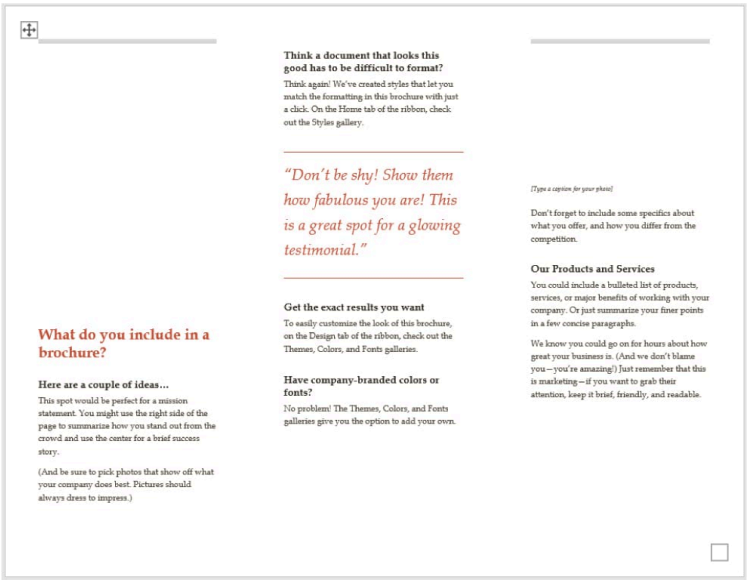


Figure 10. Interior Layout of a Trifold Brochure. Used with permission from Microsoft.

How to Customize a Brochure

1. Open Microsoft Word.
2. Search for a **Brochure** template.
3. Select a design that matches your purpose.
4. Replace the sample text with your information.
5. Right-click an existing image and select **Change Picture**, if available.
6. Insert a new image from your computer or another permitted source.
7. Use the **Design** tab to adjust the color scheme.
8. Review the layout on both pages.
9. Save or export the finished brochure.



Figure 11. Replacing Images in a Brochure Template. Used with permission from Microsoft.

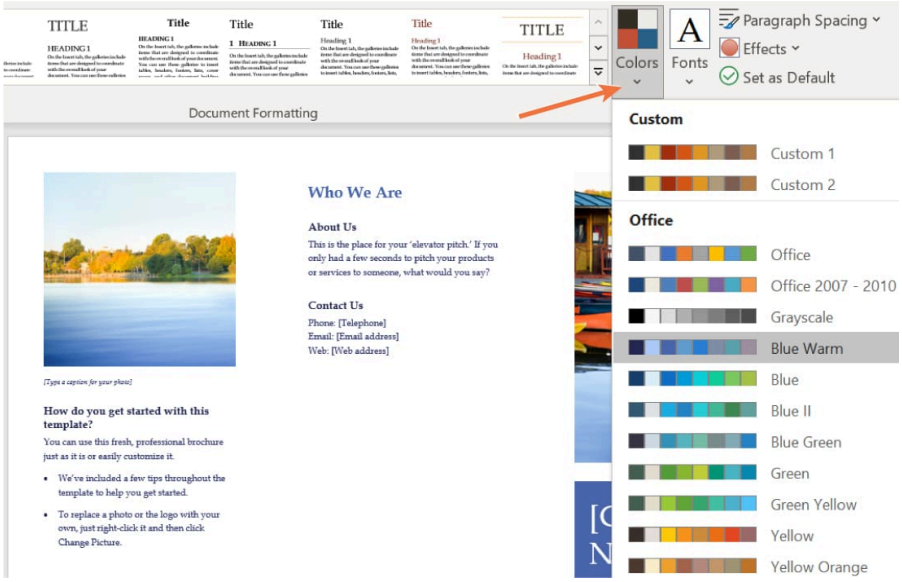


Figure 12. Changing the Brochure's Color Scheme. Used with permission from Microsoft.

Creating a Flyer

A flyer is useful for advertising a single event, product, or promotion.

Flyers should include:

- A clear title
- A short description
- Important dates and times
- Location or contact information
- Relevant images

To create a flyer, search for a **Flyer** template in Word and customize the content and design.

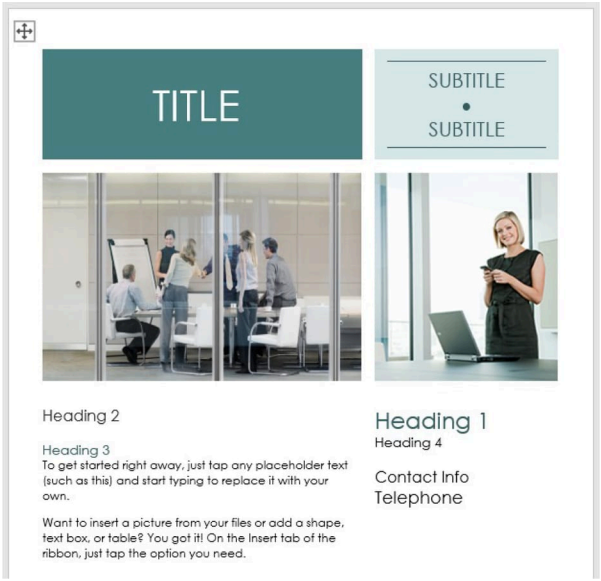


Figure 13. Example of a Professional Flyer Template. Used with permission from Microsoft.

Creating Business Invoices

An **invoice** is a document that requests payment for goods or services provided by a business.

Invoices help businesses keep track of sales and communicate payment information to customers.

Common Parts of an Invoice

- Business name and contact information
- Customer information
- Invoice number
- Invoice date
- Payment due date
- Description of products or services
- Quantity and unit price
- Subtotal, taxes, and total amount due

How to Create an Invoice

1. Open Microsoft Word.
2. Search for an **Invoice** template.
3. Select a professional design.
4. Enter the business and customer information.
5. Add the products or services provided.
6. Enter the quantity and price for each item.
7. Calculate the subtotal, applicable taxes, and total.
8. Enter the payment due date and instructions.
9. Review all amounts for accuracy.
10. Save the completed invoice.

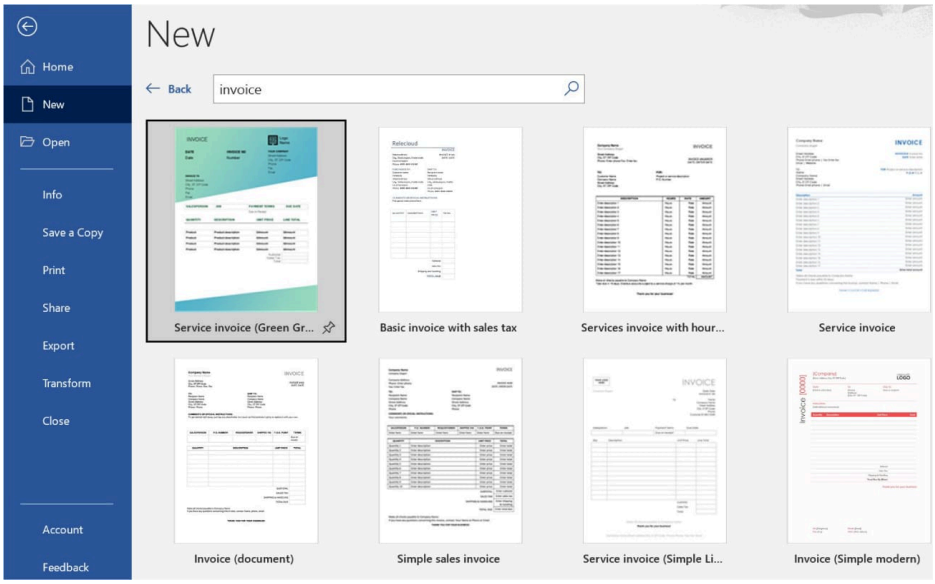


Figure 14. Finding Invoice Templates in Microsoft Word. Used with permission from Microsoft.

Important: Word templates may not automatically calculate invoice totals. Verify all calculations before sending an invoice.

Creating Business Plans

A **business plan** describes a company's goals, strategies, operations, and financial expectations.

Business plans may be used to:

- Start a new business.
- Apply for funding.
- Plan business growth.
- Evaluate market opportunities.
- Communicate goals to investors or partners.

Common Sections of a Business Plan

- Executive Summary
- Company Description
- Market Analysis
- Products or Services
- Marketing and Sales Strategy
- Operations and Management
- Financial Projections

How to Create a Business Plan

1. Open Microsoft Word.
2. Search for a **Business Plan** template.
3. Select a template appropriate for your business.
4. Review the included sections.
5. Replace the sample text with your business information.
6. Add supporting tables, charts, or graphics.
7. Apply consistent headings and formatting.
8. Review the plan for accuracy and organization.
9. Save the document.

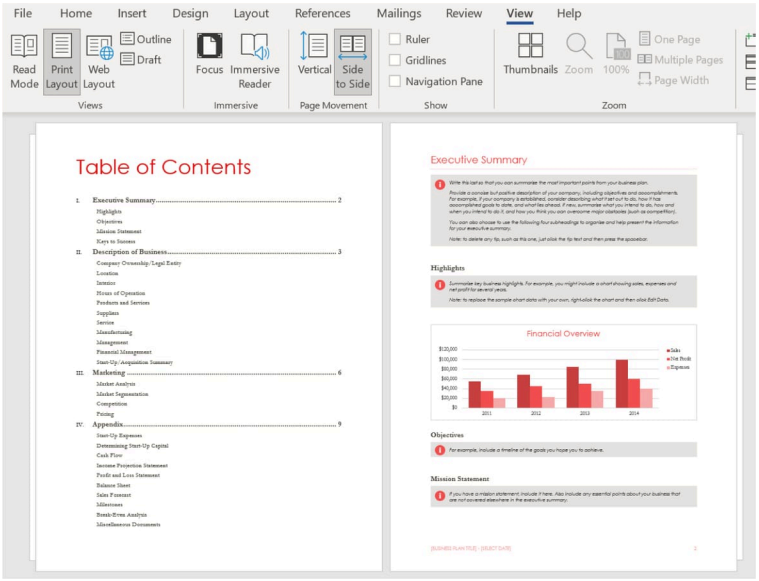


Figure 15. Example of a Business Plan Template. Used with permission from Microsoft.

Creating Résumés and Cover Letters

A **résumé** summarizes your education, work experience, skills, and qualifications.

A **cover letter** introduces you to an employer and explains why you are interested in a specific position.

Common Résumé Sections

- Name and contact information
- Professional summary
- Work experience
- Education
- Skills
- Certifications or achievements, when relevant

Choose a clean and readable résumé design. Simple formatting is often easier for applicant tracking systems to process.

How to Create a Résumé

1. Open Microsoft Word.
2. Search for a **Résumé** template.
3. Choose a professional design.
4. Replace the sample information with your own.
5. List relevant work experience and education.
6. Highlight skills related to the position.
7. Review spelling, grammar, and formatting.
8. Save the completed résumé.

Writing a Cover Letter

A professional cover letter generally includes:

1. **Introduction:** Identify the position and explain your interest.
2. **Qualifications:** Describe relevant experience and skills.
3. **Connection to the Position:** Explain how your background meets the employer's needs.

4. **Closing:** Thank the employer and express interest in discussing the opportunity.



March 28, 2023

City Administrator
1645 Davids Drive
Wilmington, OH 45177

Dear Mr. Breckel,

Please find attached my résumé for consideration for the part-time position open in your office as a billing clerk. I am a seasoned professional with the skills needed for the position. I have previous office experience at various points in my career. I am very involved in the local community serving on the board of directors of several nonprofit organizations with leadership positions as President and Treasurer. I am proficient in all Office products and have a strong attention to detail. I am very experienced in QuickBooks so I am confident I can learn the billing system used by the City Administrator's office.

I am looking for a position that allows me to contribute more to the community in a challenging environment. I am a team player with a commitment to excellence. I enjoy working with the community promoting the success of organizations in which I am involved.

Please feel free to contact me if you have any questions or wish to discuss my qualifications further. I look forward to hearing from you.

Thank you for your consideration.

Sincerely,

Sylvia Griffin
griffin_sy@gmail.com
513-333-7654

Figure 16. Example of a Professional Cover Letter. Used with permission from Microsoft.

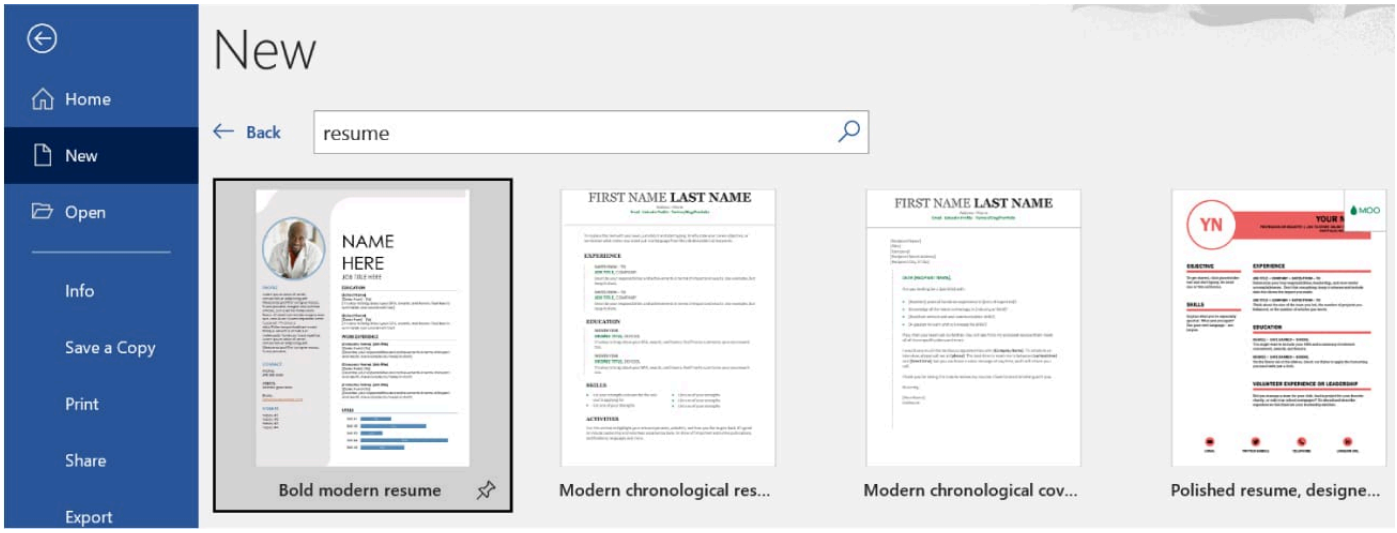


Figure 17. Searching for Résumé Templates. Used with permission from Microsoft.

Real-World Application: Creating Your Professional Brand

Personal branding involves presenting yourself consistently and professionally through documents, communication, and online platforms.

For example, you might use the same font, color scheme, and contact information on your résumé, cover letter, and business card.

To develop a professional brand:

1. Identify the skills and qualities you want others to recognize.
2. Choose professional fonts and colors.
3. Create a consistent résumé and cover letter.
4. Design a business card or personal letterhead.
5. Review your documents to ensure they communicate a consistent professional image.

Businesses also use branding guidelines to maintain a consistent appearance. For an example, explore Mitsubishi Motors' logo

guidelines.

Practice: Creating Professional Business Documents

Purpose: Practice using Microsoft Word templates to create professional documents.

Instructions:

1. Open Microsoft Word.
2. Choose a business or organization. You may create a fictional business.
3. Create a professional business memo announcing an important update.
4. Create a letterhead containing the business name and contact information.
5. Create a business card using the same branding.
6. Create a one-page flyer advertising a product, service, or event.
7. Create an invoice containing at least three products or services.
8. Use consistent fonts, colors, and formatting across your documents.
9. Review each document for spelling, grammar, and professional appearance.
10. Save each document as a separate Word file.

Suggested File Names:

- Business_Memo.docx
- Business_Letterhead.docx
- Business_Card.docx
- Business_Flyer.docx
- Business_Invoice.docx

Key Takeaways

- Templates save time and provide consistent document formatting.
- Business memos and newsletters communicate important information.
- Letterheads and envelopes support professional correspondence.
- Business cards provide contact information for networking.
- Brochures and flyers promote businesses, products, services, and events.
- Invoices document goods or services and request payment.
- Business plans outline company goals and strategies.
- Résumés and cover letters help communicate qualifications to employers.
- Consistent branding improves the professional appearance of business documents.

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7: CHAPTER 7- TABLES CHARTS, AND GRAPHICS

7.1: Working with Graphics and Text Tools in Microsoft Word

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7.1: Working with Graphics and Text Tools in Microsoft Word

Learning Objectives

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

- **Insert and format** tables to organize information.
- **Add and customize** pictures, icons, and shapes.
- **Create** SmartArt diagrams and charts to communicate information visually.
- **Use** text boxes, Quick Parts, WordArt, and other text tools.
- **Insert** special symbols and mathematical equations.
- **Apply** professional formatting and accessibility practices to business documents.

Introduction to Graphics and Text Tools

Professional business documents often contain more than written paragraphs. Tables, pictures, charts, and other visual elements help readers understand information more quickly.

For example, WorldCorp is preparing a market trends report. The report may include sales tables, product photographs, organizational diagrams, and charts showing sales performance.

In this section, you will learn how to create and customize these elements using Microsoft Word.

Creating and Formatting Tables

A **table** organizes information into rows and columns. Tables are especially helpful when comparing numbers, products, schedules, or other business information.

For example, WorldCorp could create a sales table with the following column headings:

- Product
- Quantity
- Price
- Revenue

How to Insert a Table

1. Open Microsoft Word and place your cursor where you want the table.
2. Click the **Insert** tab.
3. Select **Table**.
4. Move your pointer over the grid to select the number of rows and columns.
5. Click to insert the table.
6. Enter information into each cell.

For the WorldCorp example, select **4 columns and 5 rows**. This provides one heading row and four rows for product information.

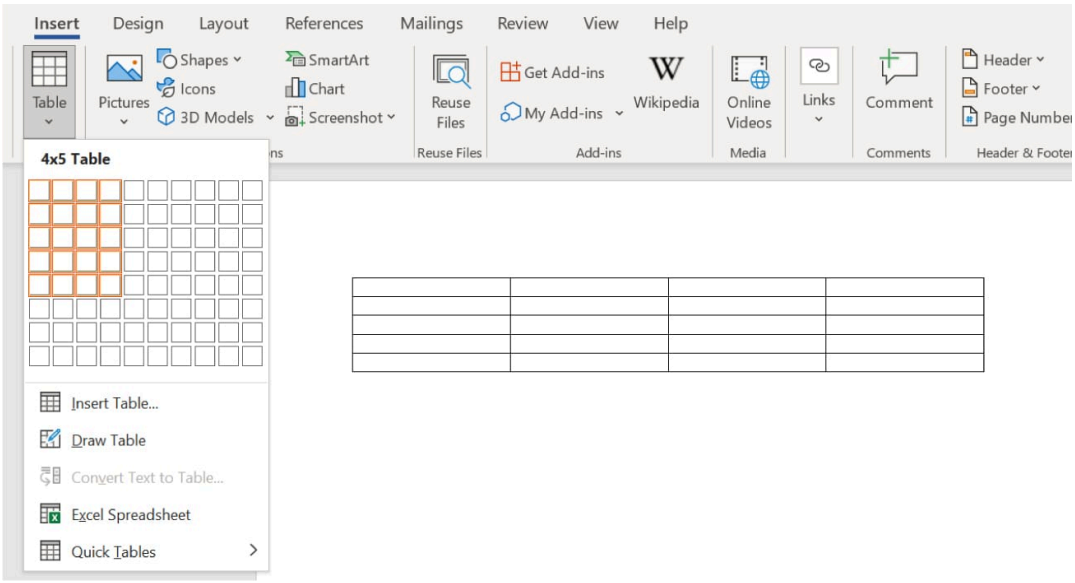


Figure 1. Inserting a table in Microsoft Word. Used with permission from Microsoft.

Applying a Table Style

Word includes built-in table styles that make information easier to read.

1. Click anywhere inside your table.
2. Open the **Table Design** tab.
3. Find the **Table Styles** gallery.
4. Select a style that matches your document.
5. Review the table to make sure the text remains easy to read.

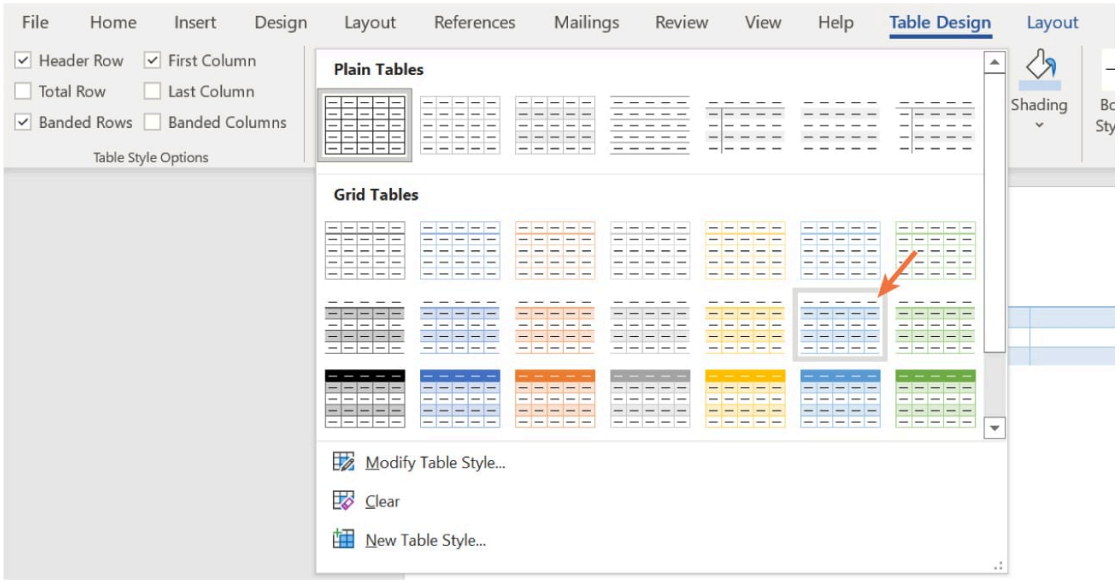


Figure 2. Applying a built-in table style. Used with permission from Microsoft.

Adding Rows and Columns

You can expand a table after creating it.

1. Click inside the row or column near where you want to add information.

2. Open the table **Layout** tab.
3. Select **Insert Above** or **Insert Below** to add a row.
4. Select **Insert Left** or **Insert Right** to add a column.
5. Enter the new information.

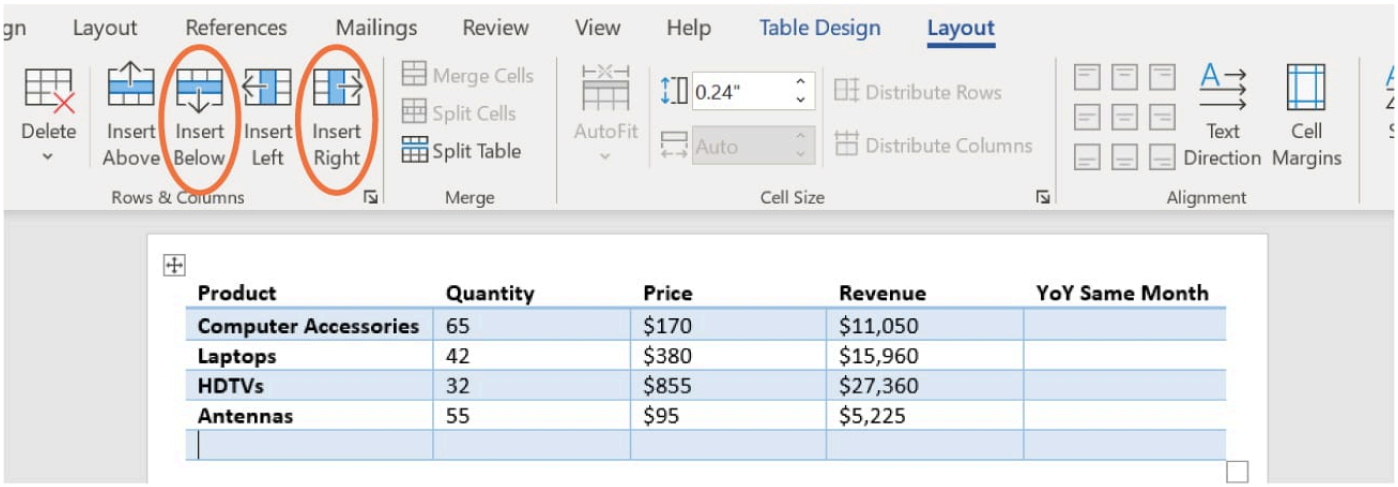


Figure 3. Adding rows and columns to a table. Used with permission from Microsoft.

Accessibility Tip

Use tables to organize actual data rather than to position unrelated text. Keep tables simple, identify the header row, and avoid unnecessary merged cells. These practices help readers, including people using assistive technology.

Using the Illustrations Tools

The **Illustrations** tools on the Insert tab help you add visual information to a document.

Common options include:

- Pictures
- Shapes
- Icons
- SmartArt
- Charts

The available options may differ depending on your version of Word.

Inserting Pictures

Pictures can help illustrate products, locations, events, and other business information.

Word may allow you to insert pictures from your computer, Microsoft stock images, or online sources.

How to Insert a Picture from Your Computer

1. Place your cursor where you want the picture.
2. Click **Insert**.
3. Select **Pictures**.
4. Choose **This Device** or the equivalent option.
5. Find and select your image.

6. Click **Insert**.

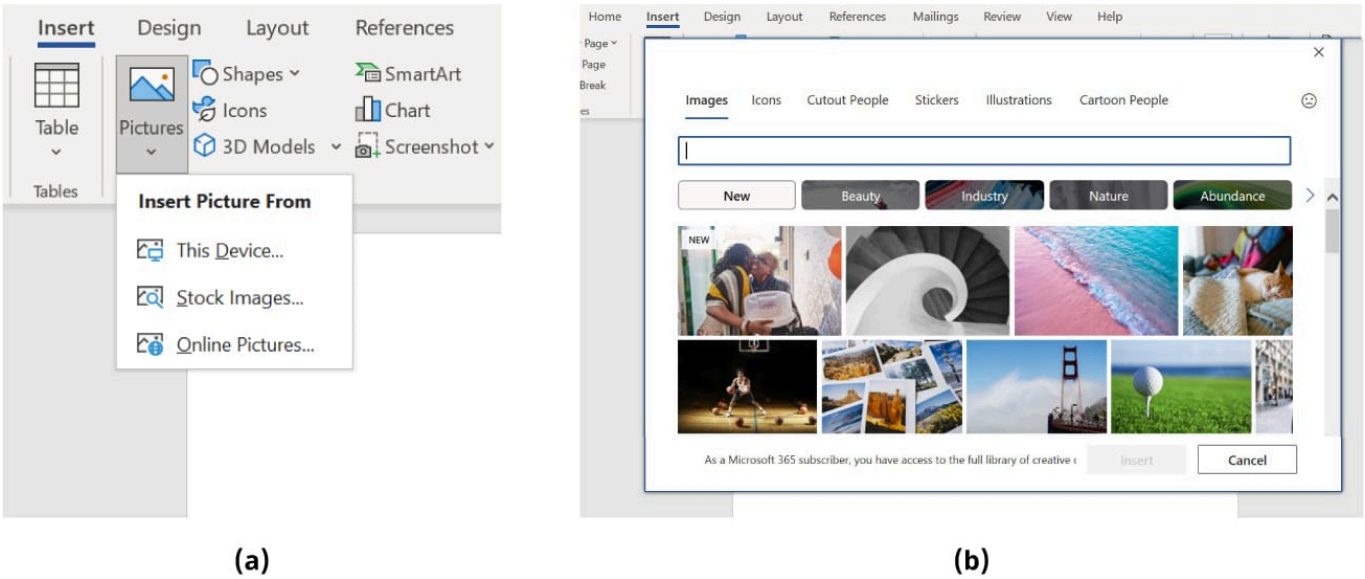


Figure 4. Different ways to insert pictures into Word. Used with permission from Microsoft.

Finding Online Pictures

Some versions of Word include an **Online Pictures** option for searching the web.

1. Click **Insert > Pictures**.
2. Choose **Online Pictures**, if available.
3. Enter a search term, such as **laptop**.
4. Review the available images and their usage rights.
5. Select an appropriate picture.
6. Click **Insert**.

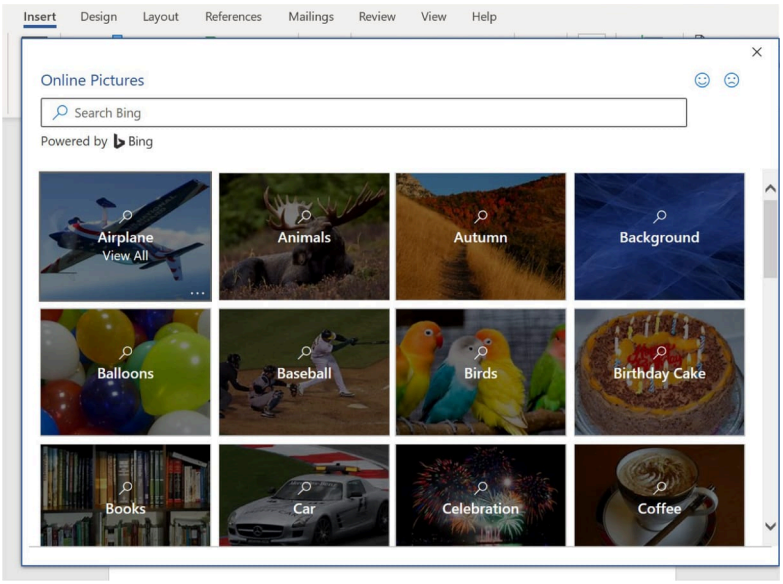


Figure 5. Searching for online pictures. Used with permission from Microsoft.

Inserting Icons

Icons are simple graphics that represent objects or ideas. They can make reports easier to understand without adding large photographs.

For example, WorldCorp could insert a laptop icon beside information about computer sales.

1. Open the **Insert** tab.
2. Select **Icons**, or find icons through the stock image tools.
3. Search for **laptop**.
4. Select an icon.
5. Click **Insert**.
6. Use the available graphics formatting tools to adjust its appearance.

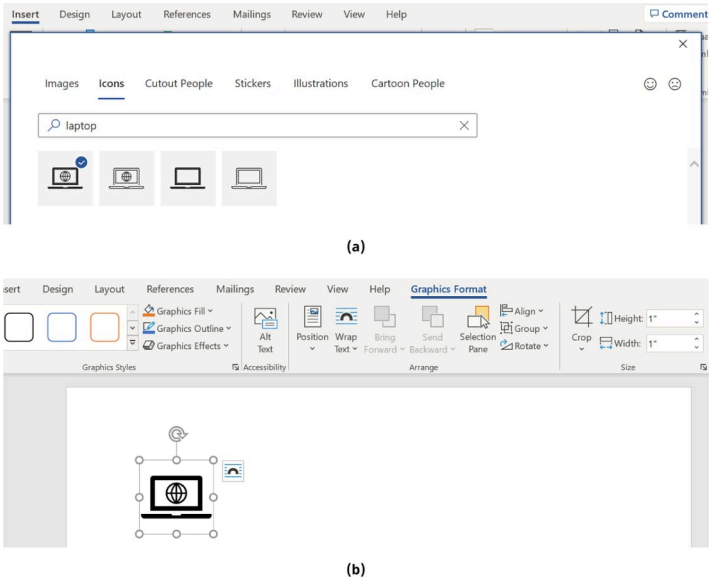


Figure 6. Finding and formatting icons. Used with permission from Microsoft.

Using Pictures from the Web

When selecting an online picture, check whether you have permission to use it.

Some images have Creative Commons licenses, but these licenses may require attribution or have other conditions.

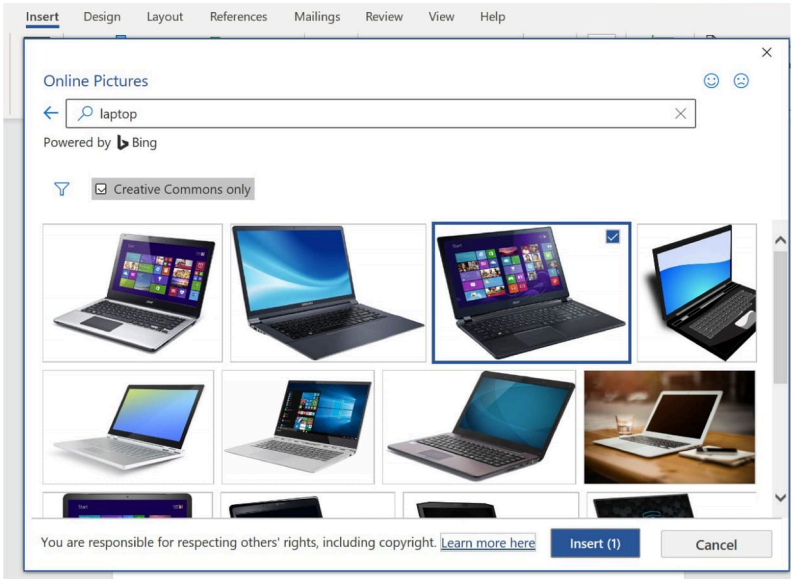


Figure 7. Searching for images with licensing filters. Used with permission from Microsoft.

After inserting a photograph, you can use the **Picture Format** tab to resize, crop, or adjust the image.

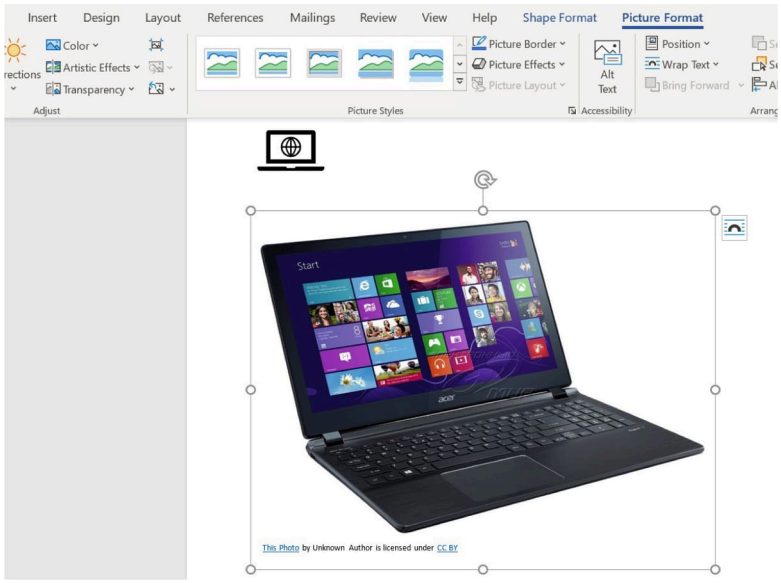


Figure 8. Inserting a photograph with attribution information. Used with permission from Microsoft.

Helpful Tip

Before using an image, verify its license and provide credit when required. For meaningful images, add alternative text by right-clicking the image and selecting **View Alt Text** or **Edit Alt Text**, depending on your Word version.

Inserting and Formatting Shapes

Shapes are graphical objects such as arrows, rectangles, circles, and lines.

Shapes can help highlight important information in a report, flyer, or presentation-style document.

How to Insert a Shape

1. Click **Insert**.
2. Select **Shapes**.
3. Choose a shape, such as an arrow.
4. Click and drag in the document to draw it.
5. Select the shape to display the **Shape Format** tab.
6. Change its color, outline, size, or position.

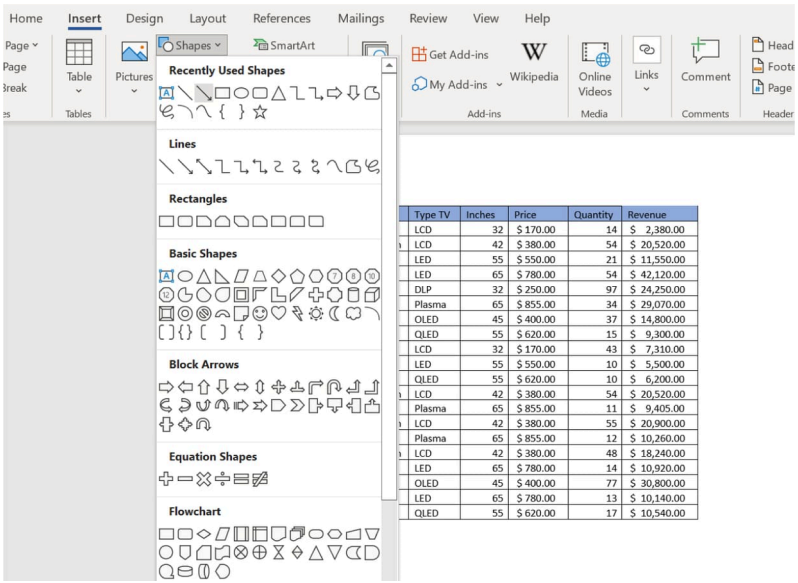
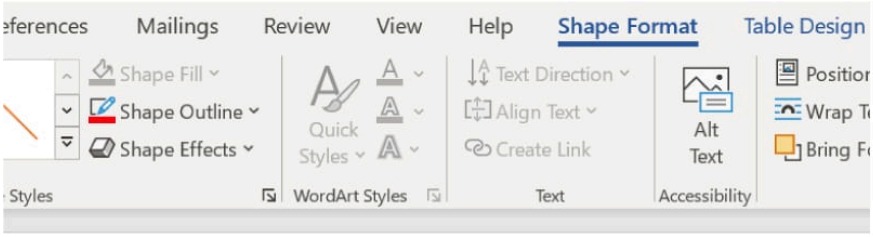


Figure 9. Choosing a shape in Microsoft Word. Used with permission from Microsoft.



Date	Model	Type TV	Inches	Price	Quantity	Revenue
2/27/2021	E-900s	LCD	32	$ 170.00	14	$ 2,380.00
2/25/2021	E-900m	LCD	42	$ 380.00	54	$ 20,520.00
2/21/2021	LE-640	LED	55	$ 550.00	21	$ 11,550.00
2/18/2021	LE-740	LED	65	$ 780.00	54	$ 42,120.00
2/15/2021	DL-540	DLP	32	$ 250.00	97	$ 24,250.00
2/11/2021	PL-850	Plasma	65	$ 855.00	34	$ 29,070.00
2/9/2021	OL-450	OLED	45	$ 400.00	37	$ 14,800.00

Figure 10. Formatting a shape to highlight important information. Used with permission from Microsoft.

Creating SmartArt Graphics

SmartArt is a Word feature that helps you organize information visually.

SmartArt can display:

- Lists

- Processes and workflows
- Organizational hierarchies
- Relationships between ideas

How to Insert SmartArt

1. Click **Insert**.
2. Select **SmartArt**.
3. Choose a category.
4. Select a graphic layout.
5. Click **OK**.
6. Replace the placeholder text with your information.
7. Use the **SmartArt Design** tab to customize the graphic.

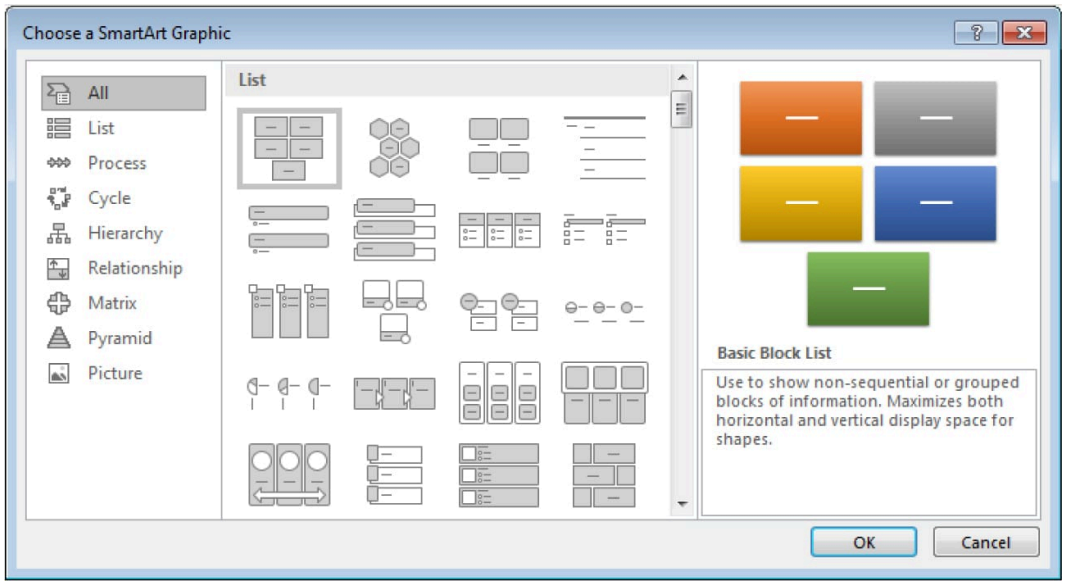


Figure 11. Exploring SmartArt layouts. Used with permission from Microsoft.

SmartArt Lists

A SmartArt list presents several related ideas in a structured visual format.

For example, WorldCorp could use a SmartArt list to summarize the strengths and weaknesses of its product lines.

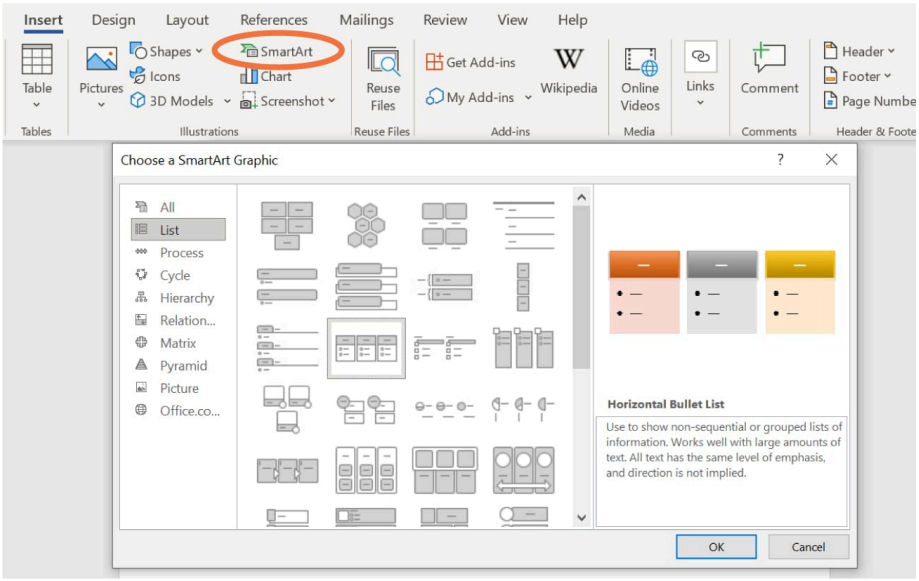


Figure 12. Selecting a SmartArt list. Used with permission from Microsoft.

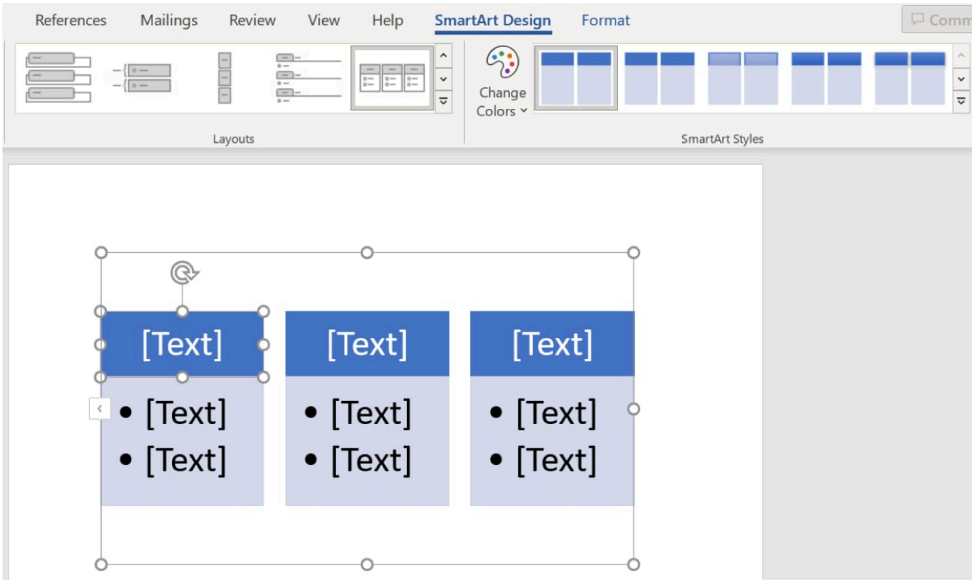


Figure 13. Example of a SmartArt list ready for customization. Used with permission from Microsoft.

SmartArt Process Charts

A **process chart** shows the steps involved in completing a task or workflow.

For example, a business report might follow this approval process:

1. Employee prepares the report.
2. Supervisor reviews the report.
3. Manager approves the report.
4. The report is distributed.

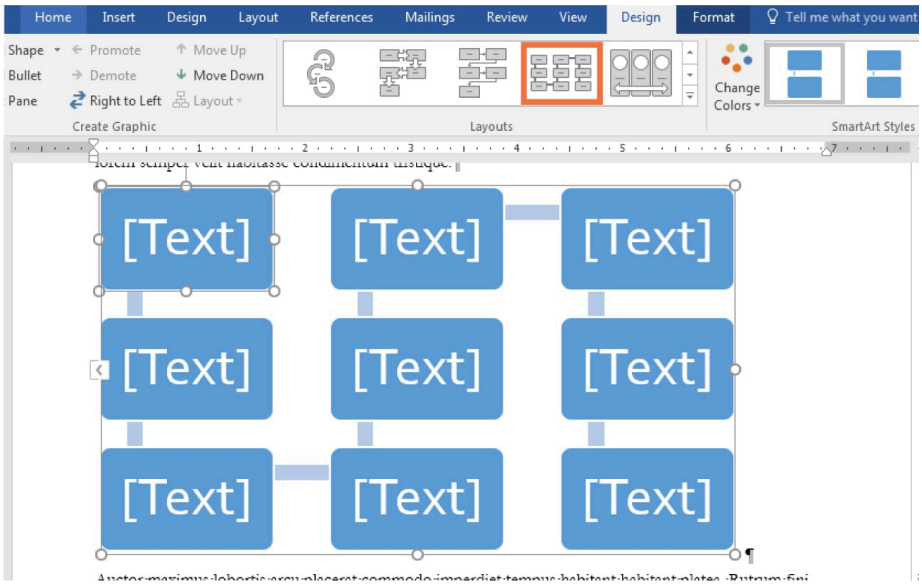


Figure 14. Example of a multistep process chart. Used with permission from Microsoft.

Creating a Basic Process Chart

1. Click **Insert > SmartArt**.
2. Select the **Process** category.
3. Choose **Basic Process**.
4. Click **OK**.
5. Enter each step in the process.
6. Use **SmartArt Design > Change Colors** to adjust the appearance.

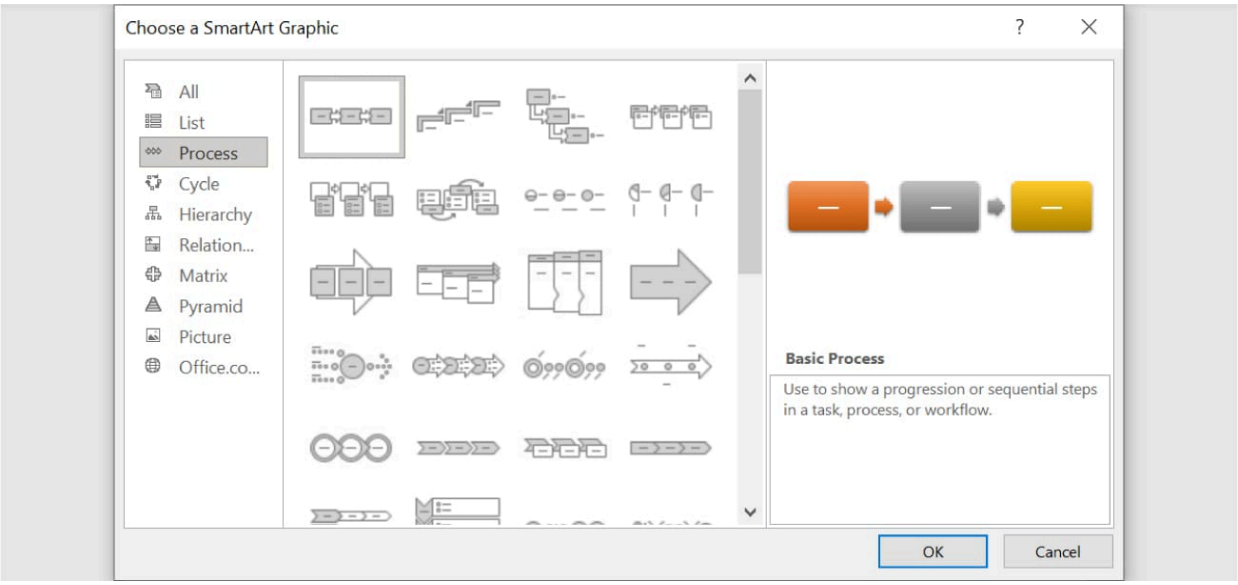


Figure 15. Selecting a Basic Process chart. Used with permission from Microsoft.

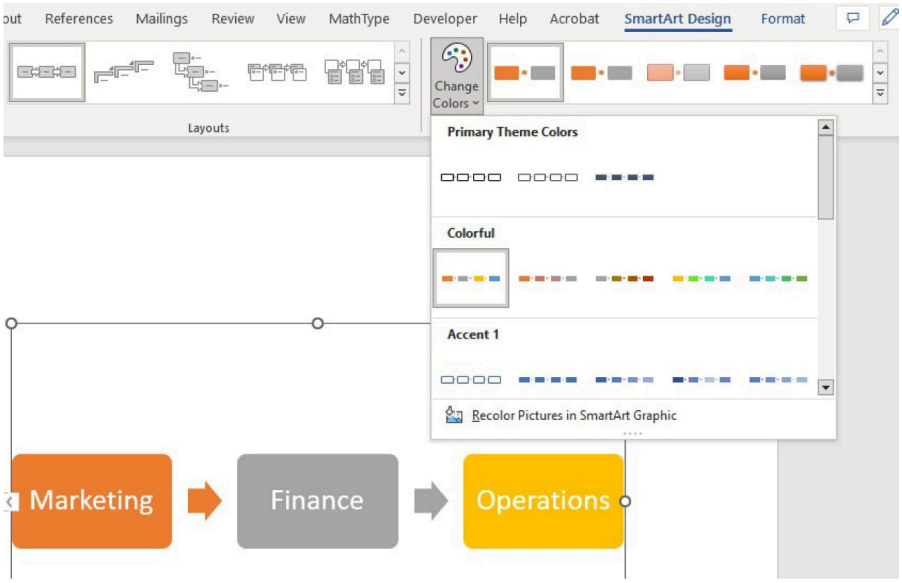


Figure 16. Customizing process chart colors. Used with permission from Microsoft.

Link to Learning

Explore this flowchart tutorial for additional examples of process diagrams.

SmartArt Hierarchy Charts

A **hierarchy chart**, sometimes called an organizational chart, shows reporting relationships within an organization.

For example, it may show a department manager, supervisors, and employees.

To create one:

1. Click **Insert > SmartArt**.
2. Select **Hierarchy**.
3. Choose an organizational chart layout.
4. Click **OK**.
5. Enter employee names or job titles.
6. Adjust the layout and formatting as needed.

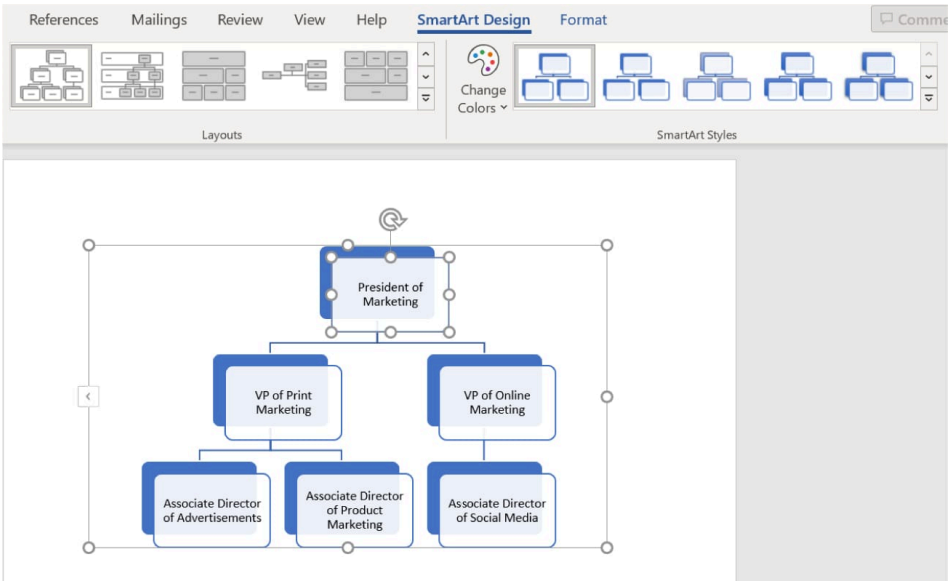


Figure 17. Example of a SmartArt hierarchy chart. Used with permission from Microsoft.

Different organizations may have different reporting structures. Some have a traditional chain of command, while others use more flexible or matrix reporting relationships.

Creating Charts in Microsoft Word

A **chart** presents numerical information visually.

Charts can help readers identify trends, compare values, and understand business performance.

Common chart types include:

- **Column Charts:** Compare values across categories.
- **Bar Charts:** Compare categories using horizontal bars.
- **Line Charts:** Show changes over time.
- **Pie Charts:** Show parts of a whole.

How to Insert a Chart

1. Click where you want the chart to appear.
2. Open the **Insert** tab.
3. Select **Chart**.
4. Choose a chart type, such as **Column**.
5. Select **Clustered Column**.
6. Click **OK**.
7. Replace the sample data in the spreadsheet window with your own information.
8. Close the spreadsheet window when finished.
9. Select the chart to customize its design.

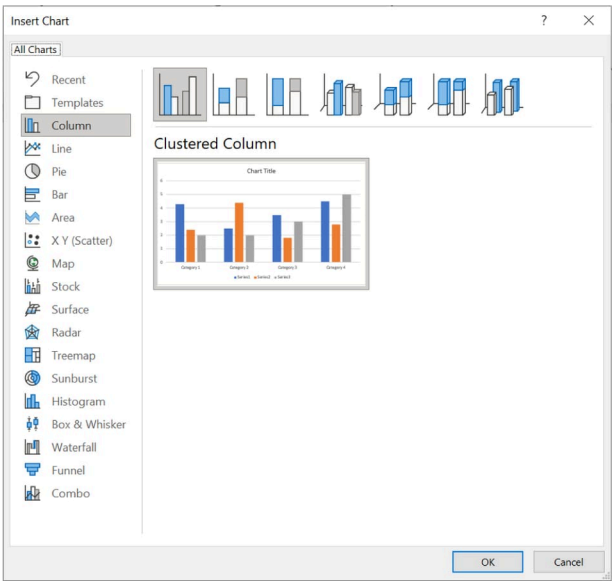


Figure 18. Choosing a column chart. Used with permission from Microsoft.

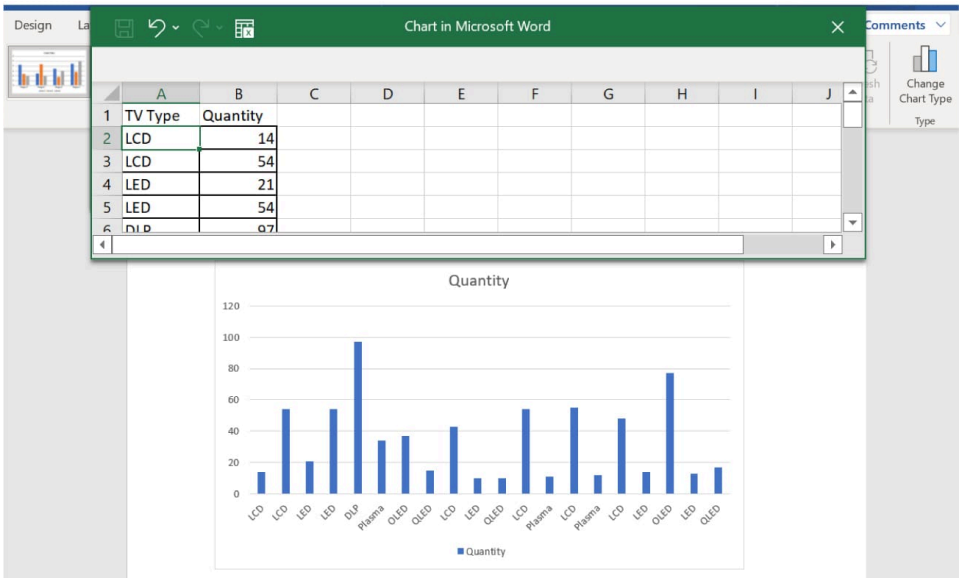


Figure 19. Entering data for a chart. Used with permission from Microsoft.

Formatting a Chart

After inserting a chart, you can customize its colors, labels, title, and layout.

1. Click the chart.
2. Open **Chart Design** or the available chart formatting tab.
3. Choose a chart style.
4. Add or modify the chart title.
5. Review the axis labels and legend.
6. Use **Edit Data** if you need to change the numbers.



Figure 20. Customizing the appearance of a chart. Used with permission from Microsoft.

Helpful Tip

For more complex calculations and datasets, it may be easier to create the chart in Microsoft Excel and then insert it into Word.

Always provide a descriptive chart title and enough information for readers to understand the data.

Using the Text Command Group

The **Text** command group is located on the Insert tab in desktop versions of Microsoft Word.

It provides tools for adding specially formatted text and document elements.

Examples include:

- Text Box
- Quick Parts
- WordArt
- Drop Cap
- Signature Line
- Date & Time
- Object

Inserting a Text Box

A **text box** is a separate area in a document that contains text.

Text boxes are useful for highlighting important information, quotations, announcements, or reminders.

How to Insert a Text Box

1. Click **Insert**.
2. Select **Text Box**.
3. Choose a built-in style or select **Draw Text Box**.

4. Enter your text.
5. Use the formatting options to change the box's appearance.

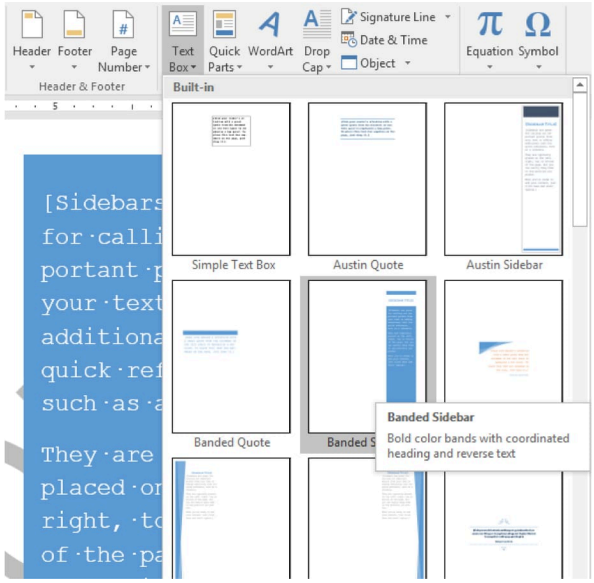


Figure 21. Selecting a text box style. Used with permission from Microsoft.

Using Quick Parts

Quick Parts allows you to insert reusable text and document information.

For example, a company may repeatedly use its mailing address, telephone number, or other standard information.

Quick Parts can also insert document properties and fields.

1. Click **Insert**.
2. Select **Quick Parts**.
3. Choose an available option, such as **Document Property**.
4. Select the information you want to insert.

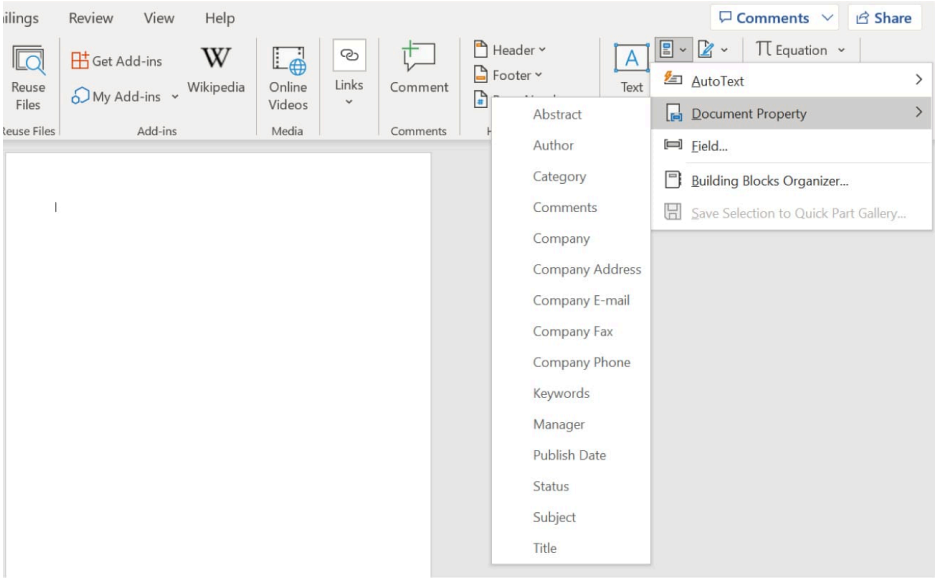


Figure 22. Inserting document information with Quick Parts. Used with permission from Microsoft.

Creating WordArt

WordArt allows you to create decorative text using special colors, outlines, and visual effects.

WordArt may be useful for flyers, newsletters, or promotional documents.

However, simple text formatting is generally more appropriate for formal letters, résumés, and business reports.

How to Insert WordArt

1. Click **Insert**.
2. Select **WordArt**.
3. Choose a style.
4. Replace the placeholder text with your own words.
5. Use the **Shape Format** tab to customize the appearance.

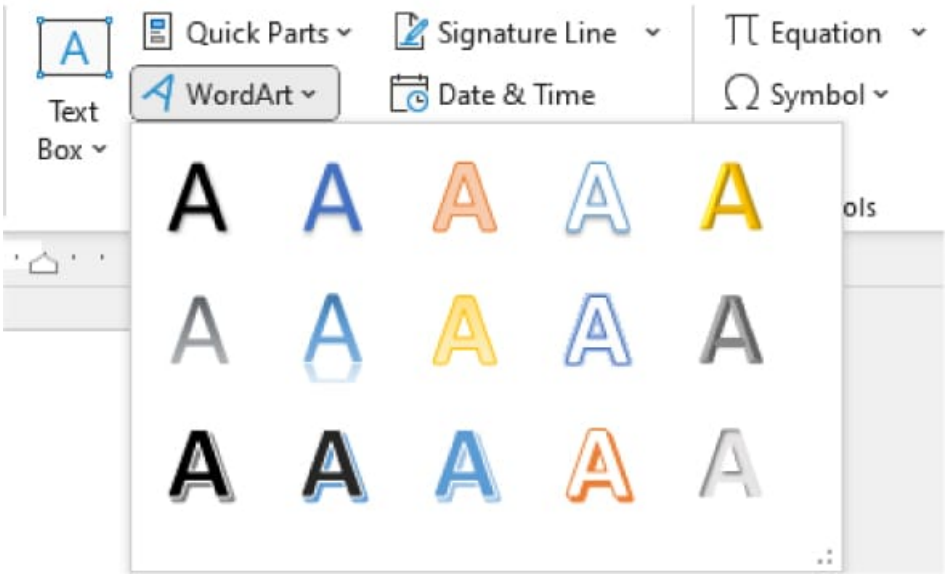


Figure 23. Selecting a WordArt style. Used with permission from Microsoft.

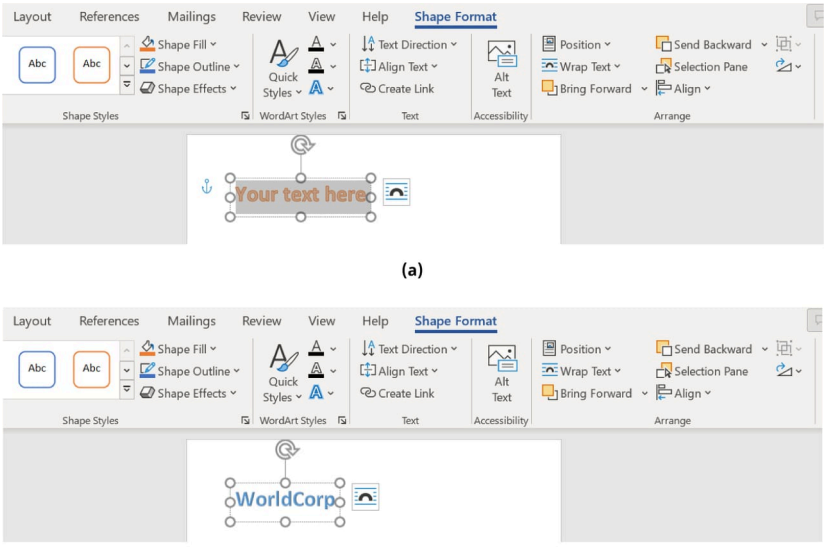


Figure 24. Customizing WordArt in a document. Used with permission from Microsoft.

Using Drop Caps

A **drop cap** is a large decorative first letter at the beginning of a paragraph.

Drop caps are often found in books, magazines, and newsletters.

1. Click inside the paragraph you want to format.
2. Open the **Insert** tab.
3. Select **Drop Cap**.
4. Choose a style.
5. Use **Drop Cap Options** for additional customization.

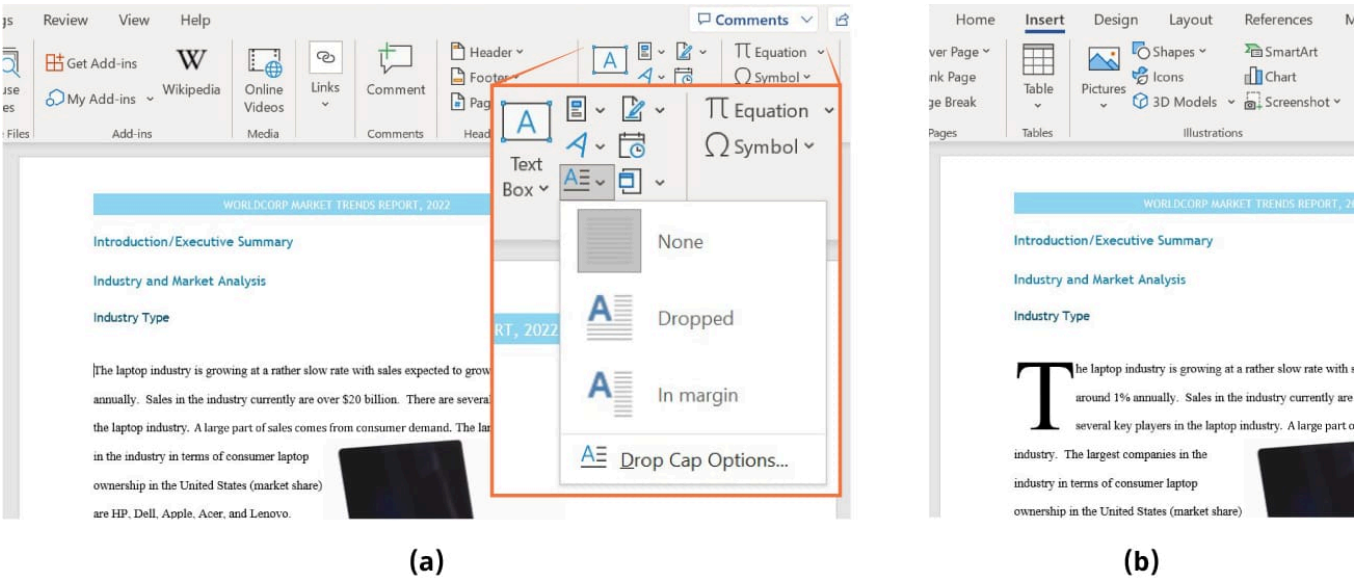


Figure 25. Example of a drop cap. Used with permission from Microsoft.

Tip: Drop caps are decorative and are generally unnecessary in formal business correspondence.

Inserting a Signature Line

A **signature line** provides a designated area for a person to sign a document.

It may include the signer's name and job title.

1. Place your cursor where the signature should appear.
2. Click **Insert**.
3. Select **Signature Line**, if available.
4. Enter the requested signer information.
5. Click **OK**.

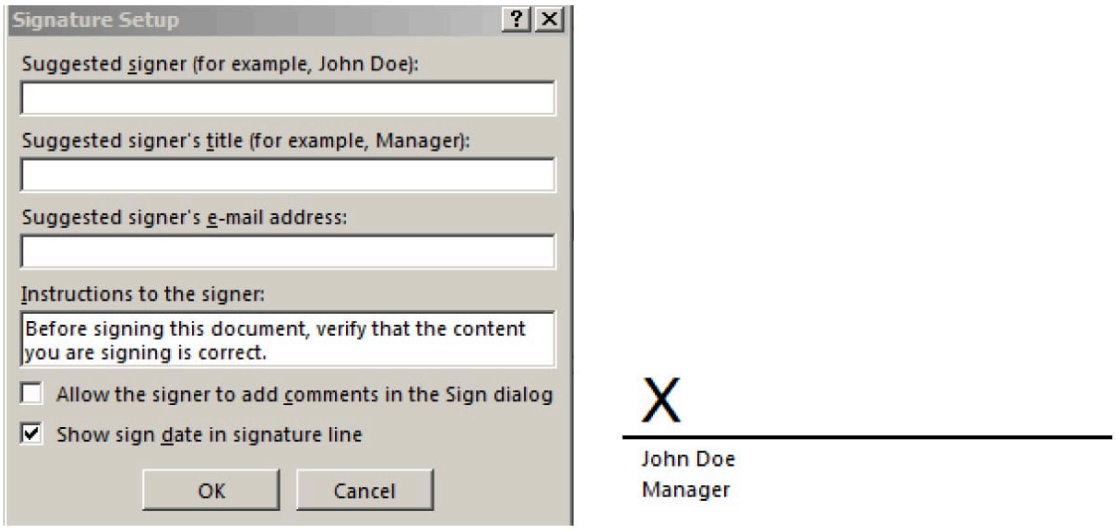


Figure 26. Creating a signature line. Used with permission from Microsoft.

Inserting the Date and Time

Word allows you to insert the current date, time, or both into a document.

1. Click where you want the date or time.
2. Open **Insert**.
3. Select **Date & Time**.
4. Choose a format.
5. Select **Update automatically** only if you want the date or time to refresh when the document is updated.
6. Click **OK**.

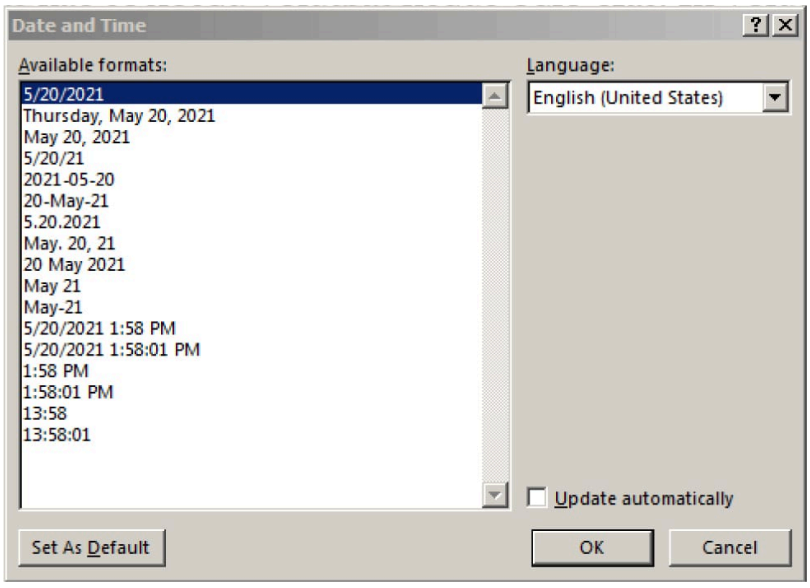


Figure 27. Choosing a date and time format. Used with permission from Microsoft.

Important Reminder

For documents that must retain their original preparation date, such as official correspondence, leave **Update automatically** unchecked.

Inserting an Object

The **Object** command allows you to insert content created in another application, such as an Excel worksheet.

Depending on the selected options, the object may be embedded in the Word document or linked to an external file.

How to Insert an Existing File as an Object

1. Click **Insert**.
2. Select **Object**.
3. Choose **Object** from the menu.
4. Open the **Create from File** tab.
5. Browse for the file.
6. Choose whether to link to the file or display it as an icon, if appropriate.
7. Click **OK**.

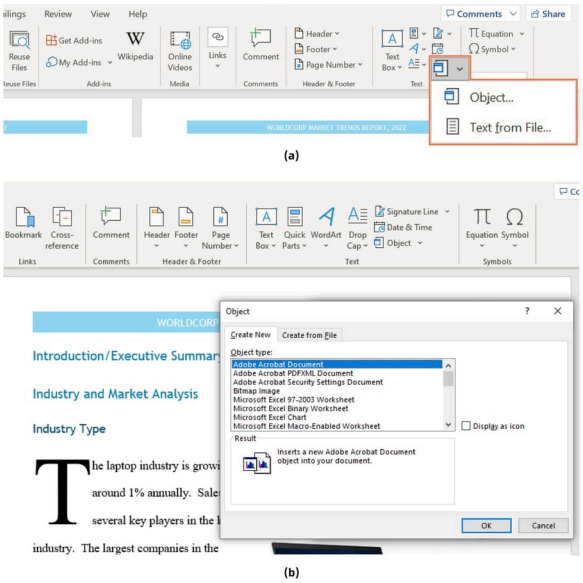


Figure 28. Inserting an object into a Word document. Used with permission from Microsoft.

Tip: Linked objects may depend on the original file remaining available. Embedded objects are stored within the document, although supported behavior depends on the file type and software.

Inserting Symbols and Equations

The **Symbols** command group allows you to insert special characters and mathematical expressions.

Inserting Special Symbols

Symbols include characters that may not appear directly on your keyboard.

Examples include:

- Currency symbols: €, £, ¥
- Mathematical symbols: ±, ≥, ≤
- Greek letters: α, β, π
- Other special characters used in professional documents

How to Insert a Symbol

1. Place your cursor where the symbol should appear.
2. Click **Insert**.
3. Select **Symbol**.
4. Choose a recently used symbol or select **More Symbols**.
5. Find the symbol you need.
6. Click **Insert**.

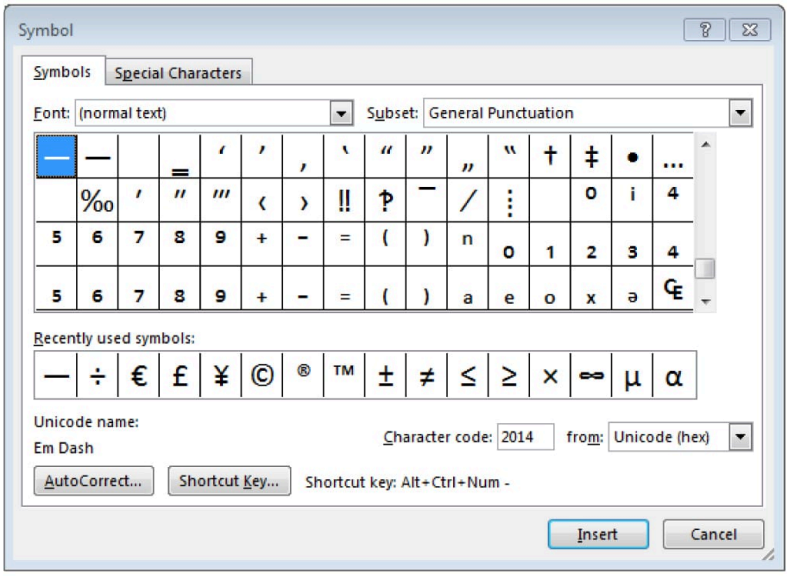


Figure 29. Finding and inserting special symbols. Used with permission from Microsoft.

Inserting Mathematical Equations

The **Equation** tool helps you create mathematical expressions for reports, research, finance, economics, and other subjects.

You can choose a built-in equation or create your own.

How to Insert an Equation

1. Place your cursor where the equation should appear.
2. Click **Insert**.
3. Select **Equation**.
4. Choose a built-in equation or select **Insert New Equation**.
5. Enter the mathematical expression.
6. Use the equation formatting tools to add symbols or structures.

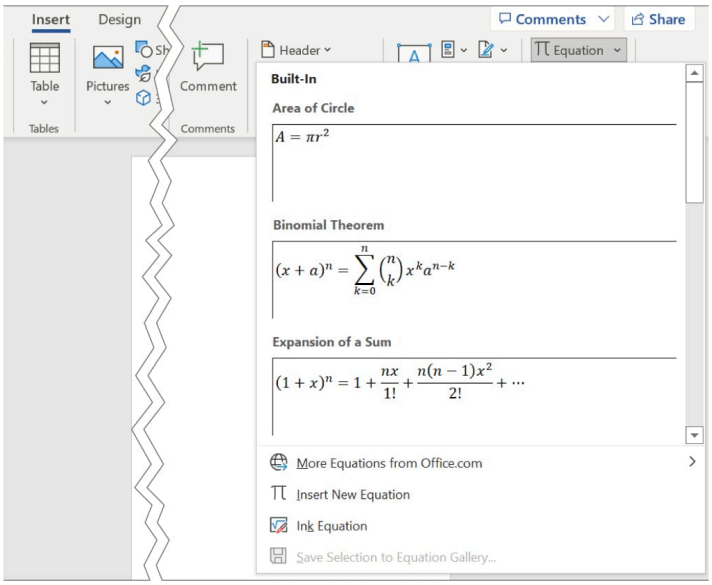
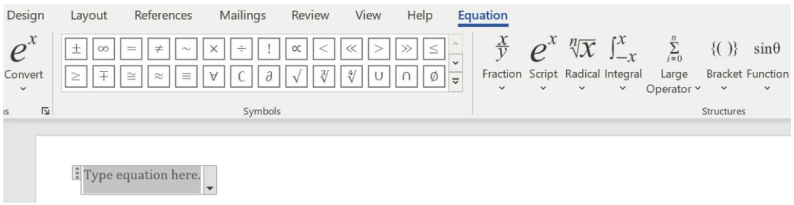
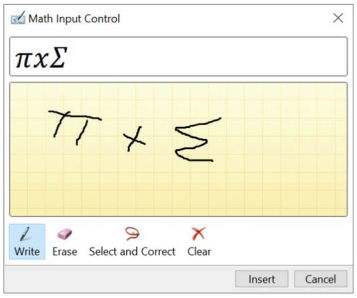


Figure 30. Selecting an equation in Microsoft Word. Used with permission from Microsoft.

Some versions of Word also offer an **Ink Equation** feature that can recognize handwritten mathematical expressions.



(a)



(b)

Figure 31. Creating and editing mathematical equations. Used with permission from Microsoft.

Practice: Creating a Professional Business Report

Purpose: Apply graphics and text tools to create a professional document in Microsoft Word.

Scenario: You work for WorldCorp and have been asked to prepare a short sales summary for management.

Instructions:

1. Open a blank Word document.
2. Add the title **WorldCorp Sales Summary**.
3. Create a table with four columns: Product, Quantity, Price, and Revenue.
4. Enter information for at least four fictional products.
5. Apply a professional table style.
6. Insert a picture or icon representing one of the products.

7. Insert a shape to highlight an important part of the document.
8. Create a SmartArt process diagram showing three or more steps in the sales process.
9. Insert a chart comparing product quantities.
10. Add a text box containing one important business observation.
11. Insert the current date.
12. Review the document for consistent formatting, readability, and accessibility.
13. Save the document as **WorldCorp_Sales_Summary.docx**.

Key Takeaways

- Tables organize information into rows and columns.
- Pictures, icons, and shapes can improve visual communication.
- SmartArt helps explain lists, workflows, and organizational relationships.
- Charts make numerical comparisons and trends easier to understand.
- Text boxes and WordArt provide additional formatting options.
- Quick Parts can insert reusable document information.
- Signature lines and date fields support professional document preparation.
- Symbols and equations help communicate specialized information.
- Visual elements should support the document's purpose and remain accessible to readers.

Source Attribution

This instructional content was adapted from OpenStax, Workplace Software and Skills, Section 4.02: Working with Graphics and Text Tools in Microsoft Word, available through Workforce LibreTexts.

The material has been reorganized, simplified, and expanded with instructional steps and practice activities for Microsoft Word coursework at Lemoore College. Original source licensing, attribution requirements, and image permissions should be verified before publication.

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8: CHAPTER 8-INTEGRATION

8.1: Creating Different Document Types in Microsoft Word
8.2: Mail Merge in Microsoft Word
8.3: Creating Forms in Microsoft Word

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8.1: Creating Different Document Types in Microsoft Word

Learning Objectives

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

- **Find, create, and customize** Microsoft Word templates.
- **Prepare** professional business memos and newsletters.
- **Design** business letterheads and mailing envelopes.
- **Create** business cards, brochures, and flyers.
- **Develop** invoices and business plans using templates.
- **Prepare** professional résumés and cover letters.
- **Apply** consistent formatting and branding to business documents.

Introduction to Professional Business Documents

Microsoft Word can be used to create many types of documents for school, work, and everyday life.

For example, a business may need a memo to communicate an announcement, a flyer to promote an event, or an invoice to request payment.

Instead of creating every document from scratch, you can use a **template** to save time and maintain a professional appearance.

In this section, you will explore common business documents and learn how to create them using Microsoft Word.

Using Microsoft Word Templates

A **template** is a predesigned document that includes formatting, layout, and sample content.

Templates help you create professional documents without having to design everything yourself.

How to Find a Template

1. Open Microsoft Word.
2. Click **File**.
3. Select **New**.
4. Use the search bar to enter a document type, such as **business memo** or **invoice**.
5. Review the available templates.
6. Select a template and click **Create**.
7. Replace the sample information with your own content.

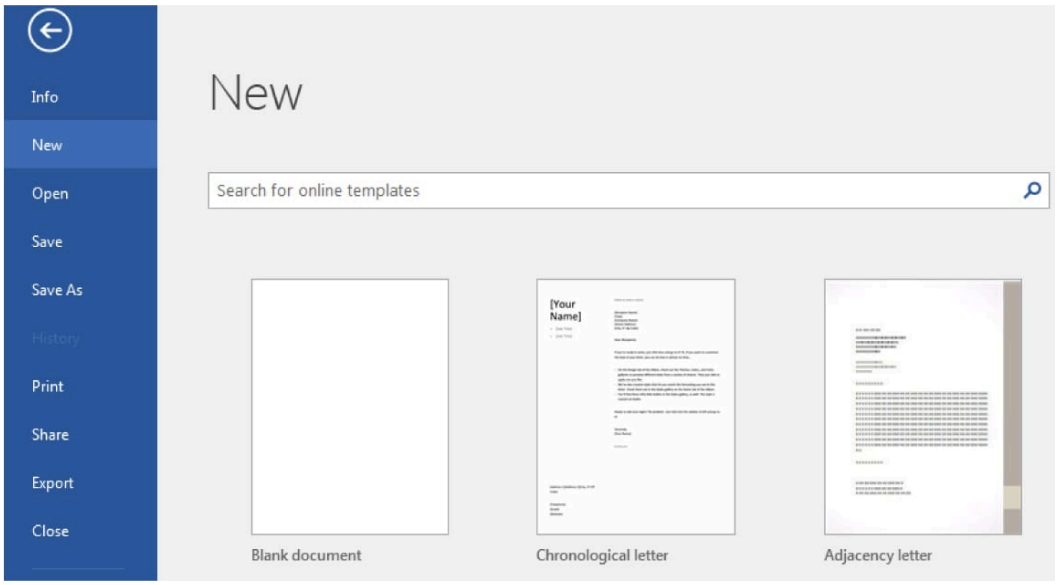


Figure 1. Searching for templates in Microsoft Word. Used with permission from Microsoft.

Creating Your Own Template

You can also save a document as a reusable template.

1. Create a document with the layout and formatting you want.
2. Click **File > Save As**.
3. Choose where to save the file.
4. Under file type, select **Word Template (*.dotx)**.
5. Enter a descriptive file name.
6. Click **Save**.

A **.dotx** file is a Word template. A **.docx** file is a regular Word document.

When you create a document from a template, save your completed work as a separate .docx file so you can reuse the original template.

Helpful Tip

When downloading templates from the internet, make sure they are compatible with Microsoft Word and come from a trusted source.

Explore additional options through Microsoft's template resources.

Creating Business Memos

A **business memo** is a professional document used to share information within an organization.

Businesses commonly use memos to:

- Announce policy changes.
- Share important updates.
- Explain new procedures.
- Request action from employees.
- Communicate project information.

Parts of a Business Memo

A typical business memo includes:

- **To:** The person or group receiving the memo.
- **From:** The person sending the memo.
- **CC:** Additional people receiving a copy, if applicable.
- **Date:** The date the memo is prepared.
- **Subject:** A short description of the topic.
- **Message:** The main information being communicated.

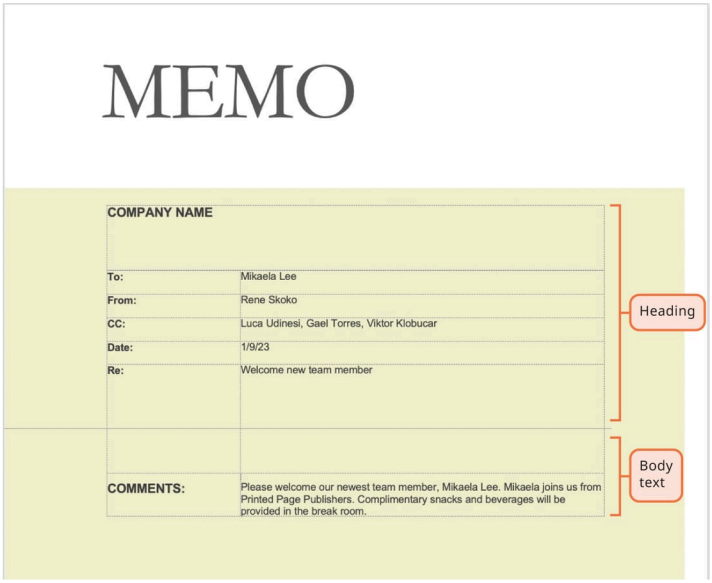


Figure 2. Example of a professional business memo. Used with permission from Microsoft.

How to Create a Business Memo

1. Open Microsoft Word.
2. Search for a **Memo** template.
3. Select a professional design.
4. Enter the recipient, sender, date, and subject.
5. Write a short introduction explaining the memo's purpose.
6. Provide the main information.
7. End with a clear closing statement or requested action.
8. Review the memo for spelling, grammar, and clarity.
9. Save the document.

Creating Business Newsletters

A **newsletter** shares information, announcements, and updates with a group of readers.

Newsletters may be distributed to employees, customers, or community members.

Common newsletter elements include:

- Headlines and section titles
- Short articles
- Pictures and graphics
- Company updates
- Upcoming events

- Contact information

How to Create a Newsletter

1. Open Microsoft Word.
2. Search for a **Newsletter** template.
3. Choose a layout appropriate for your audience.
4. Replace the sample headlines and articles.
5. Insert relevant pictures.
6. Adjust the colors and fonts.
7. Review the newsletter for readability.
8. Save the completed document.

Link to Learning

For additional guidance, explore this newsletter writing resource.

Creating Business Letterheads

A **letterhead** is a professional heading that identifies a business or individual.

Letterheads commonly include:

- Company or individual name
- Business logo
- Mailing address
- Telephone number
- Email address
- Website

Letterheads help organizations maintain a consistent appearance across professional correspondence.

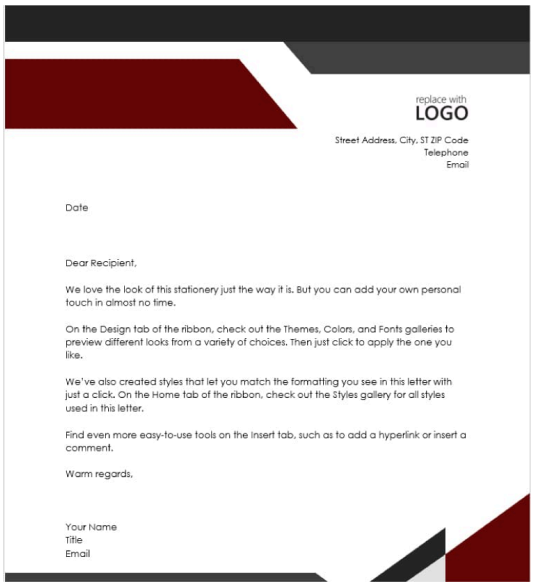


Figure 3. Example of a business letterhead template. Used with permission from Microsoft.

How to Create a Letterhead

1. Open Microsoft Word.
2. Search for a **Letterhead** template.
3. Select a professional design.
4. Replace the sample business information.
5. Insert a logo if appropriate.
6. Customize the colors and fonts.
7. Save the letterhead as a Word template if you plan to reuse it.

Creating and Printing Envelopes

Microsoft Word includes tools for preparing professional mailing envelopes.

An envelope normally contains:

- **Return Address:** The sender's mailing information.
- **Delivery Address:** The recipient's mailing information.

Saving a Return Address

In Word for Windows, you can save a return address for future envelopes.

1. Click **File > Options**.
2. Select **Advanced**.
3. Scroll to the **General** section.
4. Enter your address in the **Mailing Address** field.
5. Click **OK**.

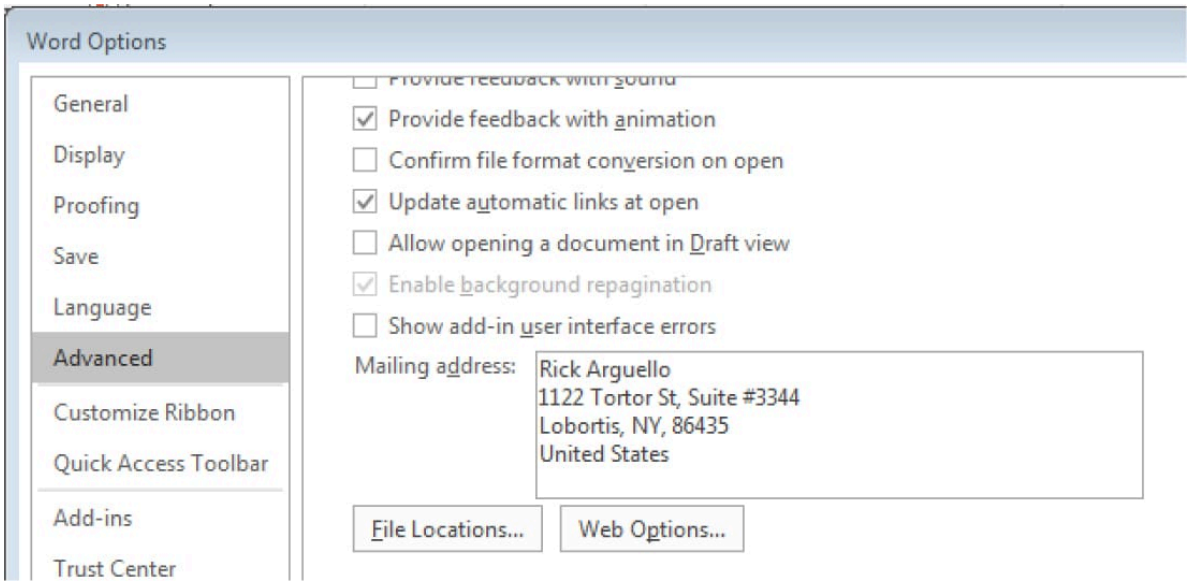


Figure 4. Saving a return address in Word. Used with permission from Microsoft.

How to Create an Envelope

1. Click the **Mailings** tab.
2. Select **Envelopes**.
3. Enter the recipient's delivery address.
4. Review or enter the return address.

5. Click **Options** to select the envelope size.
6. Review the printer settings.
7. Select **Add to Document** or **Print**.

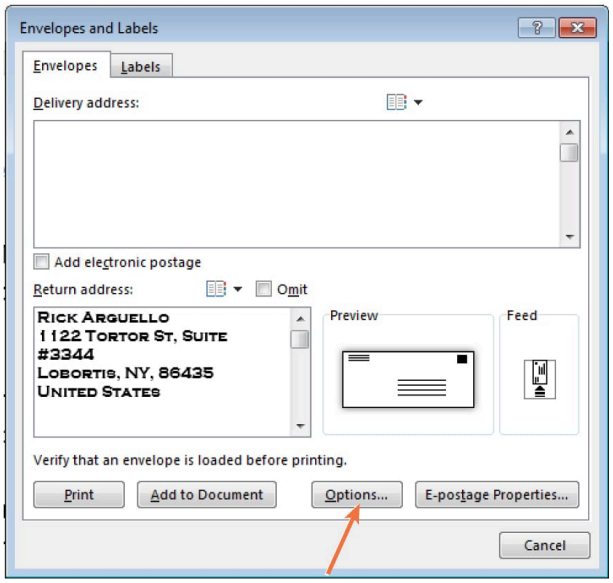


Figure 5. Entering mailing information for an envelope. Used with permission from Microsoft.

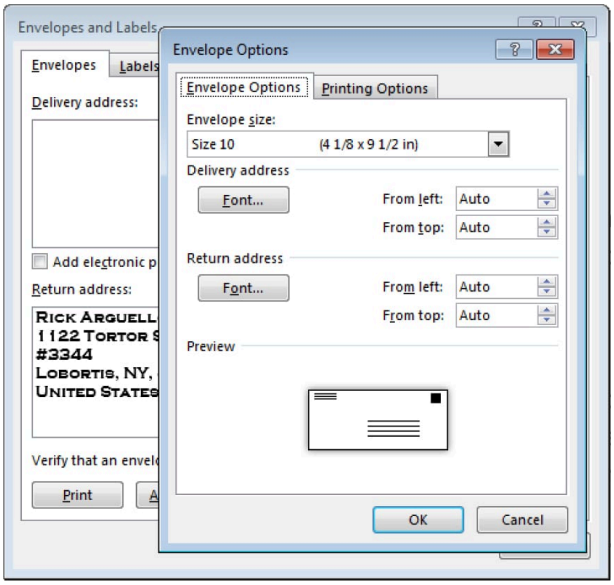


Figure 6. Customizing the envelope layout. Used with permission from Microsoft.



Figure 7. Example of a completed mailing envelope. Used with permission from Microsoft.

Printing Tip

Before printing, check your printer's instructions to confirm the correct envelope orientation and paper feed settings.

Creating Business Cards

A **business card** is a small card containing professional contact information.

Business cards are commonly used for networking and communicating with potential customers.

They often include:

- Name
- Job title
- Company name
- Phone number
- Email address
- Website
- Company logo

How to Create a Business Card

1. Open Microsoft Word.
2. Search for a **Business Card** template.
3. Select a design.
4. Replace the sample contact information.
5. Insert a company logo if appropriate.
6. Review the text size and readability.
7. Save the completed design.
8. Print on compatible cardstock or export a PDF for professional printing.

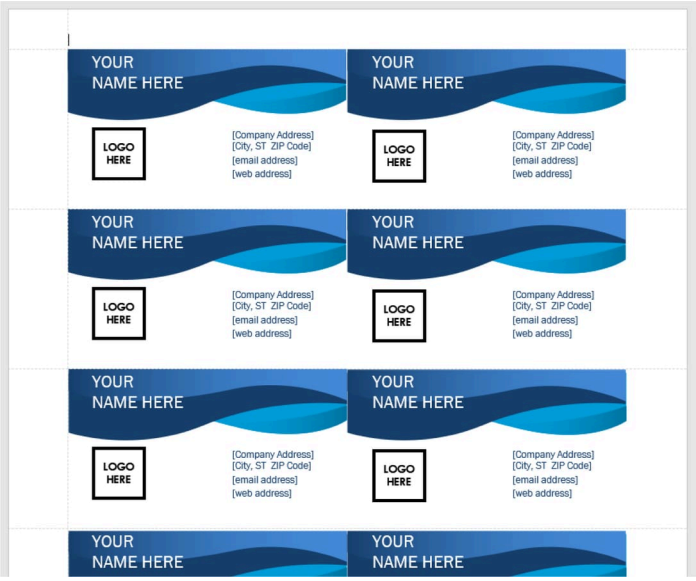


Figure 8. Example of a business card template. Used with permission from Microsoft.

Helpful Tip: Some business card templates automatically repeat information across the page. Others require you to update each card separately.

Creating Brochures and Flyers

Brochures and **flyers** are promotional documents used to advertise products, services, events, and businesses.

A **brochure** usually includes multiple sections or panels and provides more detailed information.

A **flyer** is typically a single-page document designed to communicate a short announcement or promotion.

Creating a Brochure

Many brochures use a **trifold layout**, which divides a sheet into three panels.

For example, WorldCorp might create a brochure advertising its annual holiday toy drive.



Figure 9. Example of a trifold brochure layout. Used with permission from Microsoft.

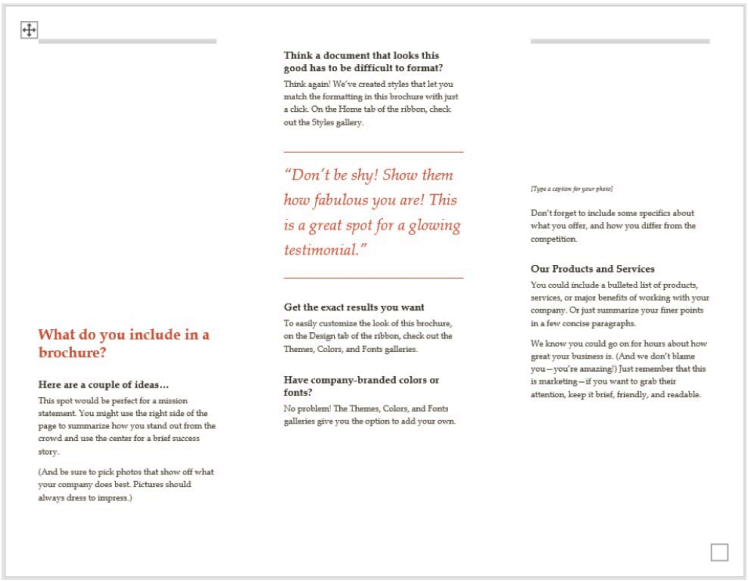


Figure 10. Interior layout of a trifold brochure. Used with permission from Microsoft.

How to Customize a Brochure

1. Open Microsoft Word.
2. Search for a **Brochure** template.
3. Select a design.
4. Replace the sample text with your information.
5. Right-click an existing picture and select **Change Picture**, if available.
6. Choose a new image from your computer or another permitted source.
7. Use the **Design** tab to adjust the color scheme.
8. Review both pages and all panels.
9. Save or export the completed brochure.



Figure 11. Replacing a picture in a brochure template. Used with permission from Microsoft.

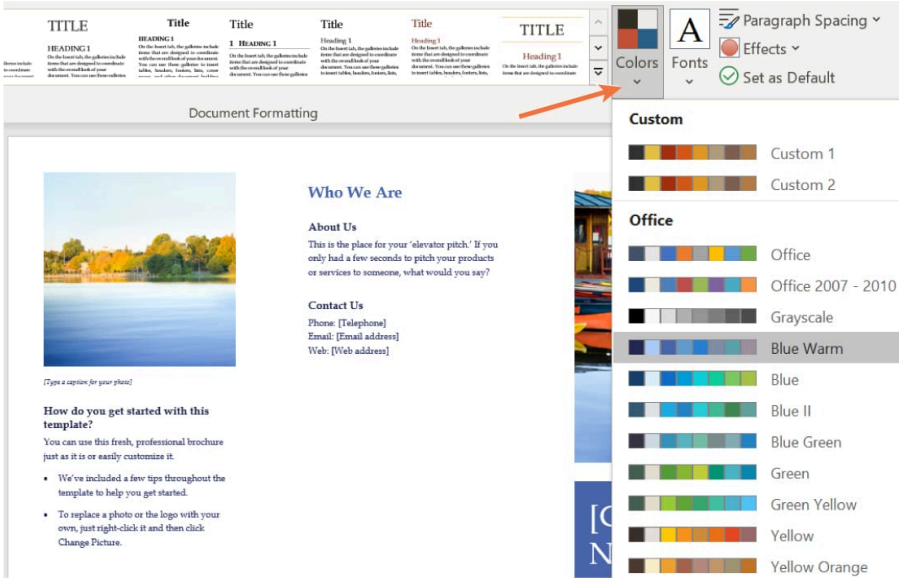


Figure 12. Changing the brochure's color scheme. Used with permission from Microsoft.

Creating a Flyer

A flyer is useful for promoting a single event, product, service, or special offer.

Flyers should include:

- A clear title
- A short description
- Important dates and times
- Location or contact information
- Relevant pictures or graphics

How to Create a Flyer

1. Open Microsoft Word.
2. Search for a **Flyer** template.

3. Choose a design that matches your purpose.
4. Replace the sample text.
5. Insert relevant images.
6. Customize the fonts and colors.
7. Review the layout for readability.
8. Save the completed flyer.

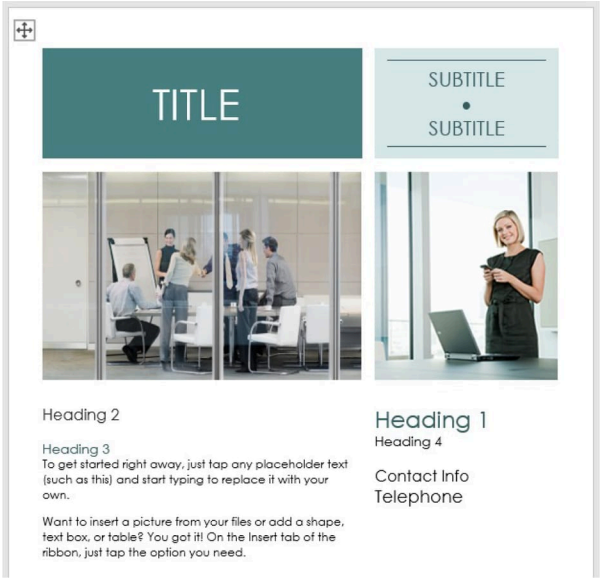


Figure 13. Example of a professional flyer template. Used with permission from Microsoft.

Creating Business Invoices

An **invoice** is a document that requests payment for products or services provided by a business.

Invoices help businesses communicate payment information and maintain financial records.

Common Parts of an Invoice

- Business name and contact information
- Customer information
- Invoice number
- Invoice date
- Payment due date
- Description of products or services
- Quantity and price
- Subtotal, applicable taxes, and total amount due

How to Create an Invoice

1. Open Microsoft Word.
2. Search for an **Invoice** template.
3. Select a professional design.
4. Enter the business and customer information.
5. Add the products or services provided.
6. Enter the quantity and price for each item.
7. Calculate the subtotal, applicable taxes, and total.
8. Enter the payment due date.
9. Review all amounts for accuracy.
10. Save the invoice.

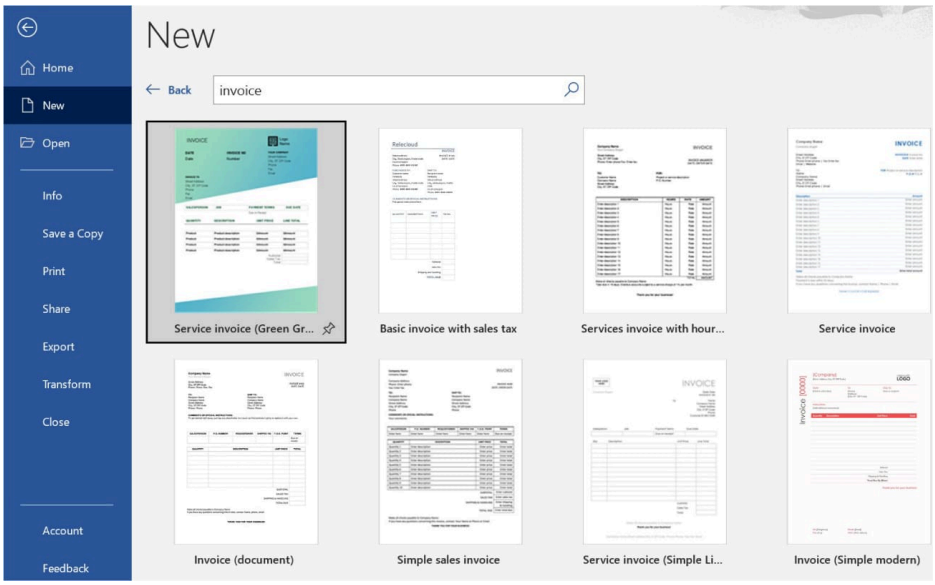


Figure 14. Finding invoice templates in Microsoft Word. Used with permission from Microsoft.

Important Reminder

Not every Word invoice template automatically calculates totals. Always verify quantities, prices, taxes, and the final amount before sending an invoice.

Creating Business Plans

A **business plan** describes a company's goals, operations, strategies, and financial expectations.

Business plans may be used to:

- Start a new business.
- Apply for funding.
- Plan business growth.
- Evaluate market opportunities.
- Communicate goals to investors or partners.

Common Sections of a Business Plan

- Executive Summary
- Company Description
- Market Analysis
- Products or Services
- Marketing and Sales Strategy
- Operations and Management
- Financial Projections

How to Create a Business Plan

1. Open Microsoft Word.
2. Search for a **Business Plan** template.
3. Select a template appropriate for your business.
4. Review the included sections.
5. Replace the sample text with your business information.

6. Add supporting tables, charts, or graphics as needed.
7. Apply consistent headings and formatting.
8. Review the plan for accuracy and organization.
9. Save the document.

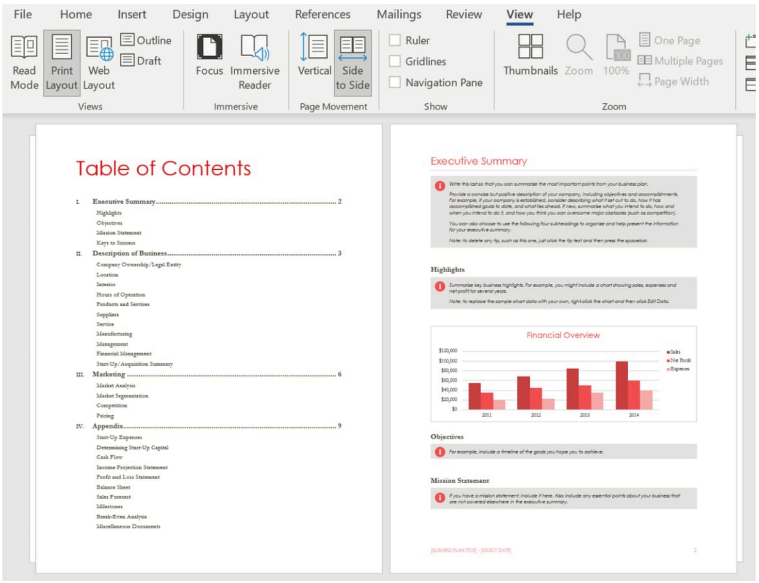


Figure 15. Example of a business plan template. Used with permission from Microsoft.

Creating Résumés and Cover Letters

A **résumé** summarizes your education, work experience, skills, and qualifications.

A **cover letter** introduces you to an employer and explains why you are interested in a particular position.

Common Résumé Sections

- Name and contact information
- Professional summary
- Work experience
- Education
- Skills
- Certifications or achievements, when relevant

How to Create a Résumé

1. Open Microsoft Word.
2. Search for a **Résumé** template.
3. Choose a professional design.
4. Replace the sample information with your own.
5. List relevant work experience and education.
6. Highlight skills related to the position.
7. Review spelling, grammar, and formatting.
8. Save the completed résumé.

Helpful Tip: Simple, clearly structured résumés are often easier for applicant tracking systems to process than designs with complicated graphics and text boxes.

Writing a Cover Letter

A professional cover letter generally includes:

1. **Introduction:** Identify the position and explain your interest.
2. **Qualifications:** Describe relevant experience and skills.
3. **Connection to the Position:** Explain how your background meets the employer's needs.
4. **Closing:** Thank the employer and express interest in discussing the opportunity.



March 28, 2023

City Administrator
1645 Davids Drive
Wilmington, OH 45177

Dear Mr. Breckel,

Please find attached my résumé for consideration for the part-time position open in your office as a billing clerk. I am a seasoned professional with the skills needed for the position. I have previous office experience at various points in my career. I am very involved in the local community serving on the board of directors of several nonprofit organizations with leadership positions as President and Treasurer. I am proficient in all Office products and have a strong attention to detail. I am very experienced in QuickBooks so I am confident I can learn the billing system used by the City Administrator's office.

I am looking for a position that allows me to contribute more to the community in a challenging environment. I am a team player with a commitment to excellence. I enjoy working with the community promoting the success of organizations in which I am involved.

Please feel free to contact me if you have any questions or wish to discuss my qualifications further. I look forward to hearing from you.

Thank you for your consideration.

Sincerely,

Sylvia Griffin
griffin_sa@gmail.com
513-333-7654

Figure 16. Example of a professional cover letter. Used with permission from Microsoft.

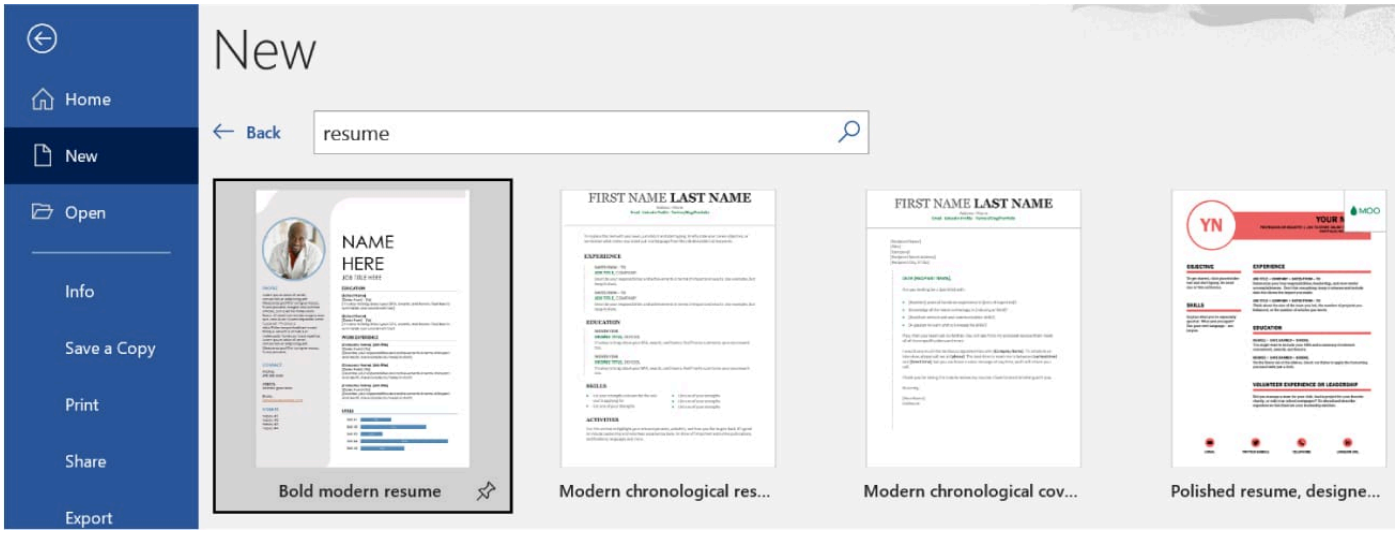


Figure 17. Searching for résumé templates. Used with permission from Microsoft.

Real-World Application: Creating Your Professional Brand

Personal branding involves presenting yourself consistently and professionally through your documents, communication, and online presence.

For example, you might use the same font, colors, and contact information on your résumé, cover letter, and business card.

To develop a professional brand:

1. Identify the skills and qualities you want others to recognize.
2. Choose professional fonts and colors.
3. Create a consistent résumé and cover letter.
4. Design a business card or personal letterhead.
5. Review your documents to ensure they communicate a consistent professional image.

Businesses also use branding guidelines to maintain consistency. Explore Mitsubishi Motors' logo guidelines as an example.

Practice: Creating Professional Business Documents

Purpose: Practice using Microsoft Word templates to create professional documents.

Scenario: Imagine that you own a small business. You need to prepare several documents for customers and employees.

Instructions:

1. Open Microsoft Word.
2. Choose a business name. You may create a fictional business.
3. Create a business memo announcing an important update.
4. Create a letterhead containing your business name and contact information.
5. Design a business card using the same branding.
6. Create a one-page flyer advertising a product, service, or event.
7. Create an invoice containing at least three products or services.
8. Use consistent fonts, colors, and formatting across your documents.
9. Review each document for spelling, grammar, and professional appearance.
10. Save each document as a separate Word file.

Suggested File Names:

- Business_Memo.docx
- Business_Letterhead.docx
- Business_Card.docx
- Business_Flyer.docx
- Business_Invoice.docx

Key Takeaways

- Templates save time and provide consistent document formatting.
- Business memos and newsletters communicate important information.
- Letterheads and envelopes support professional correspondence.
- Business cards provide contact information for networking.
- Brochures and flyers promote businesses, products, services, and events.
- Invoices document products or services and request payment.
- Business plans outline company goals and strategies.
- Résumés and cover letters help communicate qualifications to employers.
- Consistent branding improves the professional appearance of business documents.

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This instructional content was adapted from OpenStax, Workplace Software and Skills, Section 5.01: Creating Different Document Types in Microsoft Word, available through Workforce LibreTexts.

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8.2: Mail Merge in Microsoft Word

Learning Objectives

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

- **Explain** the purpose of mail merge in Microsoft Word.
- **Identify** the main document, data source, and merge fields.
- **Create** a professional business letter for mail merge.
- **Build** and manage a recipient list.
- **Insert** personalized information using merge fields.
- **Preview and complete** a mail merge.
- **Apply** mail merge to real-world business communication.

Introduction to Mail Merge

Businesses often need to send the same information to multiple customers, employees, or organizations.

For example, a company may need to notify 100 customers about a change in business hours.

Writing 100 individual letters would take a considerable amount of time. Fortunately, Microsoft Word includes a feature called **Mail Merge** that can simplify this process.

Mail merge allows you to create one document and personalize it automatically for multiple recipients.

In this section, you will learn how to create personalized business letters using the mail merge tools in Microsoft Word.

Understanding Mail Merge

Mail merge is a Microsoft Word feature that combines a standard document with information from a recipient list.

For example, imagine that WorldCorp needs to send letters to customers announcing its holiday warehouse hours.

Instead of typing each customer's name and address separately, WorldCorp can create one letter and use mail merge to insert each customer's information.

Three Important Parts of Mail Merge

Mail merge involves three main components:

1. **Main Document:** The letter, email, label, or other document containing information shared by all recipients.
2. **Data Source:** A list containing personalized information, such as names, addresses, and email addresses. This is also called a recipient list or source document.
3. **Merged Document:** The completed output containing personalized information for each selected recipient.

Word connects the main document to the data source using **merge fields**.

Merge fields are placeholders that tell Word where to insert information from the recipient list.

For example:

- **«First_Name»** inserts a recipient's first name.
- **«Last_Name»** inserts a recipient's last name.

- **«Address_Line_1»** inserts a street address.
- **«City»** inserts a city.
- **«State»** inserts a state.
- **«ZIP_Code»** inserts a ZIP code.

When the mail merge is completed, Word replaces these placeholders with the information from each recipient's record.

Helpful Tip

Mail merge is useful for business letters, envelopes, mailing labels, invitations, and personalized email messages.

The following instructions focus on the desktop version of Microsoft Word for Windows. Some commands may differ in Word for Mac or Word for the web.

Step 1: Creating the Main Document

The **main document** contains the message you want to send to all recipients.

For this example, WorldCorp will create a business letter notifying customers about upcoming holiday warehouse closures.

How to Create the Main Document

1. Open Microsoft Word.
2. Create a blank document or select a professional business letter template.
3. Enter the company name and contact information.
4. Write the date and the main message.
5. Leave space for the recipient's name and mailing address.
6. Leave space for a personalized greeting.
7. Review the letter for spelling, grammar, and professional appearance.
8. Save the document as **WorldCorp_Holiday_Letter.docx**.

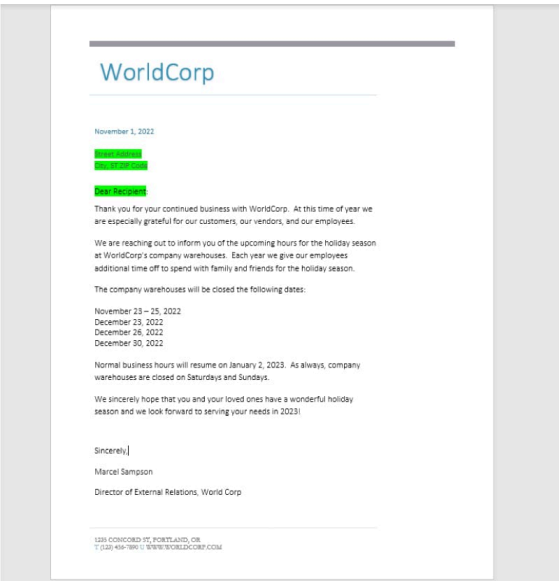


Figure 1. Preparing the main document for mail merge. Used with permission from Microsoft.

Notice that the example highlights the areas where customer information will appear.

These highlighted areas are temporary placeholders. You will replace them with actual merge fields later.

Example Business Letter

You can use the following sample message when creating your main document:

> **WorldCorp**
>
> November 2, 2026
>
> [Customer Mailing Address]
>
> Dear [Customer Name],
>
> We would like to inform you that WorldCorp will have adjusted warehouse hours during the upcoming holiday season.
>
> Some orders and shipments may experience delays while our facilities are closed. We encourage you to plan your orders accordingly.
>
> Thank you for your continued business and understanding.
>
> Sincerely,
>
> WorldCorp Customer Service Team

Important: The information in square brackets is temporary. You will replace these placeholders with merge fields after connecting your recipient list.

Step 2: Creating the Recipient List

The next step is to create a **data source** containing the information for each recipient.

You can create a new list directly in Word or connect an existing list from Microsoft Excel or another supported source.

For this example, you will create a new recipient list.

How to Start a New Recipient List

1. Open your WorldCorp business letter.
2. Click the **Mailings** tab.
3. Select **Start Mail Merge > Letters**, if you have not already selected the document type.
4. Click **Select Recipients**.
5. Choose **Type a New List**.
6. Wait for the New Address List window to appear.

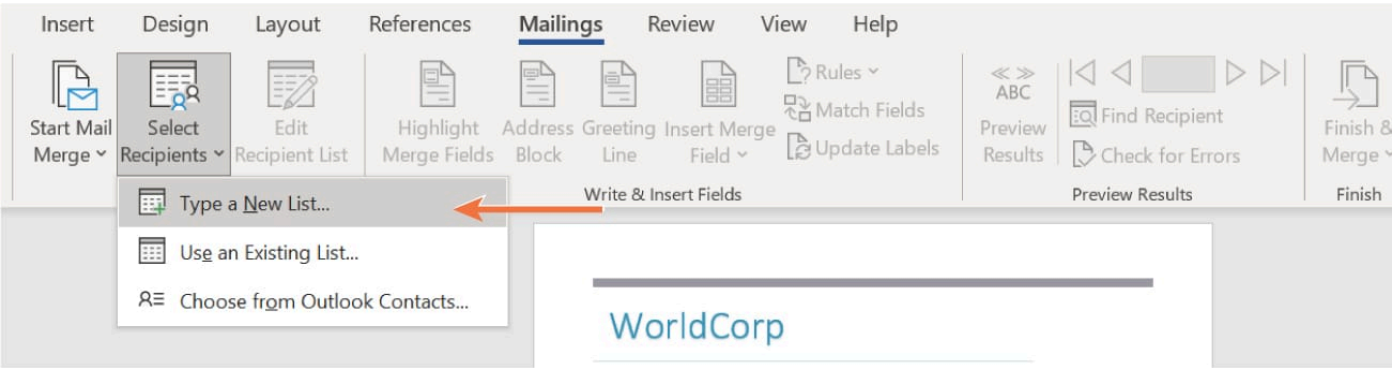


Figure 2. Selecting the option to create a new recipient list. Used with permission from Microsoft.

Understanding the Recipient List

A recipient list organizes information into **fields** and **records**.

- **Field:** A category of information, such as First Name, City, or ZIP Code.
- **Record:** The complete information for one recipient.

For example, a recipient list might contain the following information:

First Name	Last Name	City	State
Maria	Lopez	Fresno	CA
James	Wilson	Hanford	CA
Sofia	Ramirez	Visalia	CA
Daniel	Chen	Lemoore	CA

These are fictional recipients for practice.

Customizing the Recipient Fields

Word provides several fields by default, but you can customize them to match your document.

1. In the New Address List window, select **Customize Columns**.
2. Review the available field names.
3. Use **Add** to create a new field.
4. Use **Delete** to remove an unnecessary field.
5. Use **Rename** to change a field name.
6. Use **Move Up** or **Move Down** to rearrange fields.
7. Click **OK** when finished.

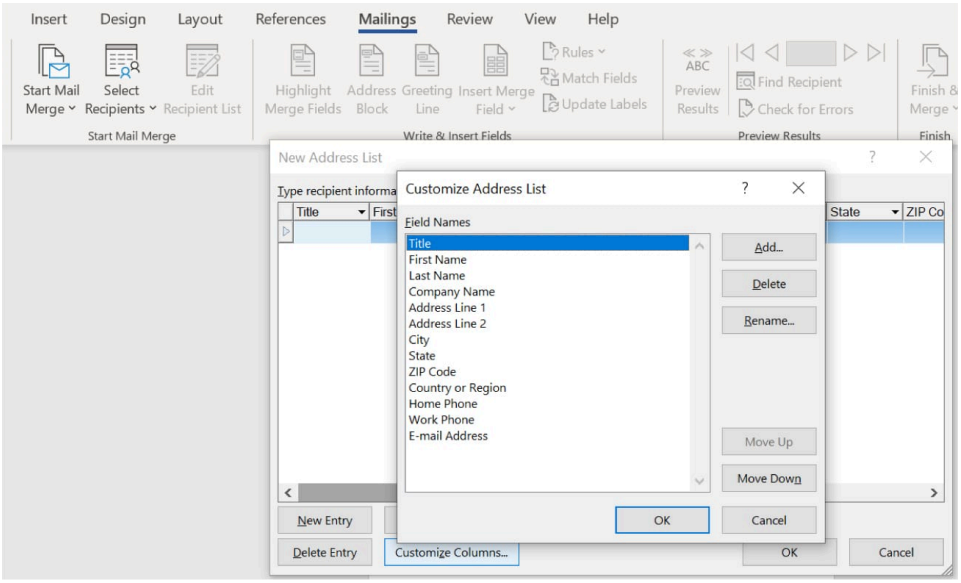


Figure 3. Customizing the fields in a recipient list. Used with permission from Microsoft.

For the WorldCorp letter, make sure your list contains these fields:

- First Name
- Last Name
- Address Line 1

- City
- State
- ZIP Code

Entering Recipient Information

1. Enter the first recipient's information in the appropriate fields.
2. Click **New Entry** to add another recipient.
3. Repeat until you have entered all recipients.
4. Check names, addresses, and ZIP codes for accuracy.
5. Click **OK** when finished.

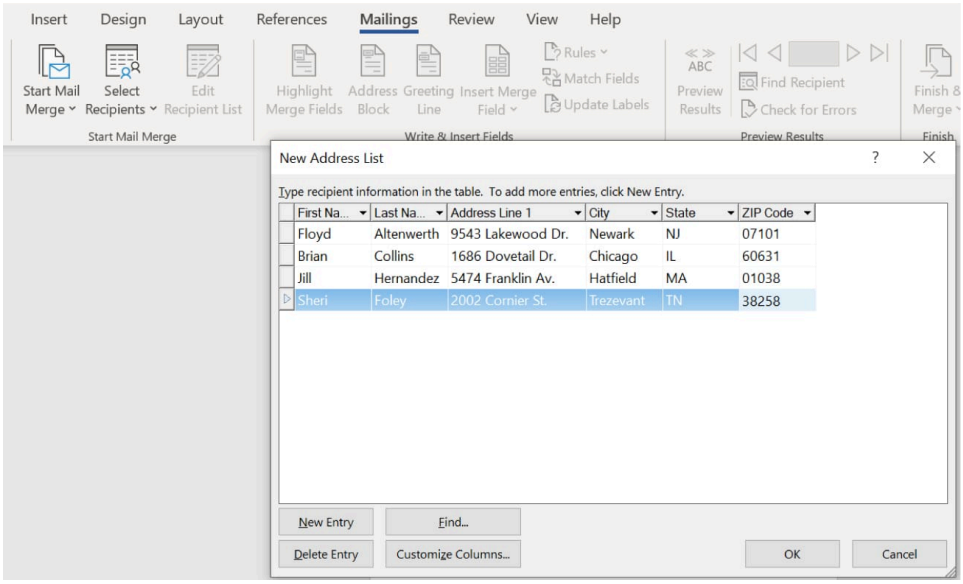


Figure 4. Entering customer information into the recipient list. Used with permission from Microsoft.

Saving the Recipient List

After entering the recipients, Word will ask you to save the list.

1. Choose a folder where you can easily find the file.
2. Enter a descriptive name, such as **WorldCorp_Customers**.
3. Click **Save**.
4. Keep the recipient list available for future updates or mail merges.

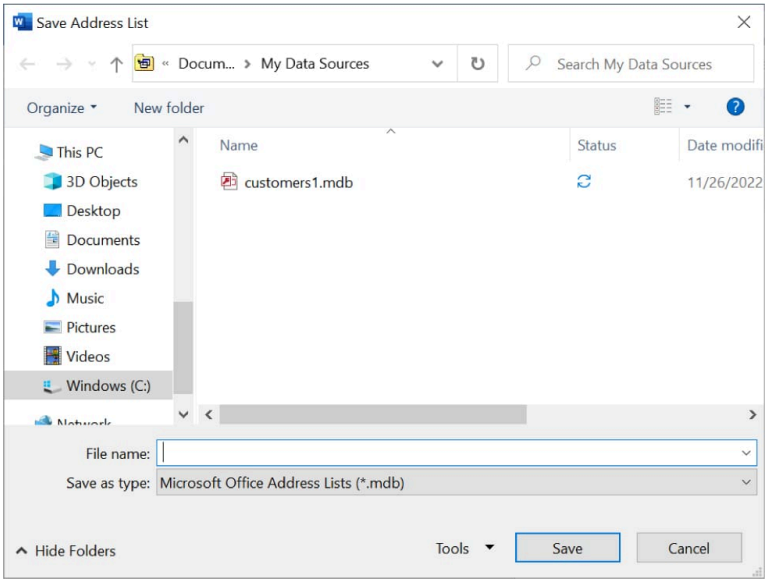


Figure 5. Saving the recipient list as a mail merge data source. Used with permission from Microsoft.

Word may save a newly created address list in a Microsoft Office Address List format, such as **.mdb**, depending on the version.

Privacy Reminder

Recipient lists may contain personal information. Store them securely and use only information you are authorized to access. For classroom practice, use fictional names and addresses.

Step 3: Inserting Merge Fields

Now that your main document and recipient list are ready, you can connect the two using **merge fields**.

Merge fields tell Word which information to insert and where it should appear.

How to Insert Merge Fields

1. Open your main document.
2. Confirm that your recipient list is connected under **Mailings > Select Recipients**.
3. Place your cursor where you want personalized information to appear.
4. Click **Insert Merge Field**.
5. Select the field you want to insert.
6. Repeat for the remaining fields.
7. Remove any temporary placeholder text.

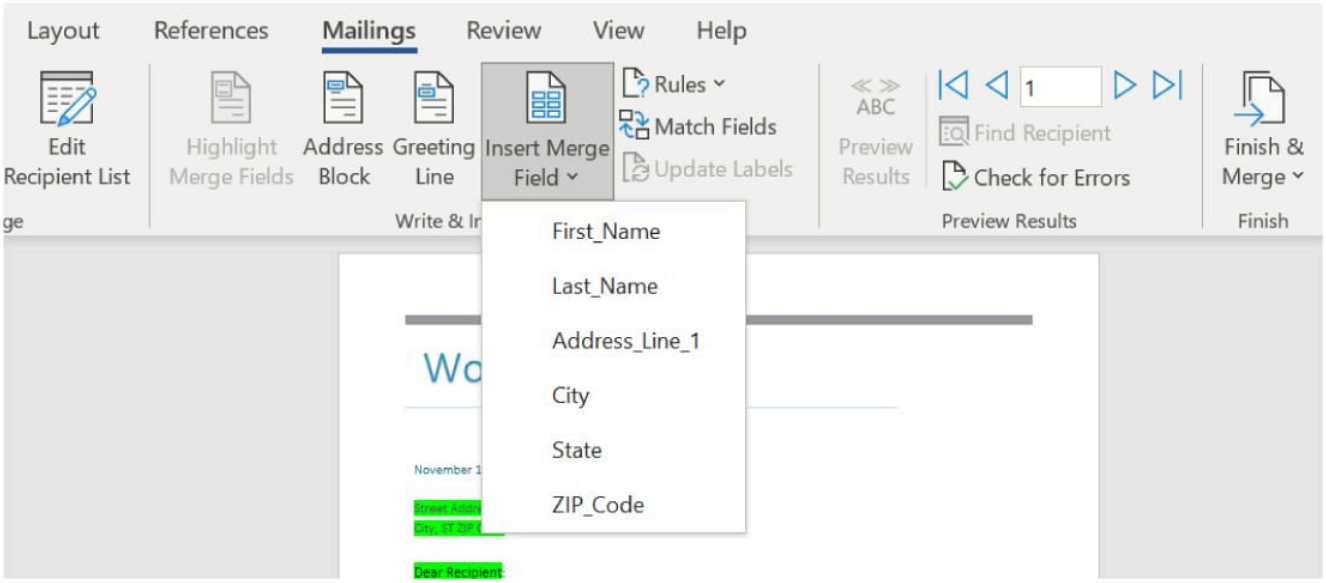


Figure 6. Selecting fields from the recipient list. Used with permission from Microsoft.

Formatting the Mailing Address

For the WorldCorp letter, insert the fields in the following order:

«First_Name» «Last_Name»

«Address_Line_1»

«City», «State» «ZIP_Code»

Each field will automatically display the corresponding information from the recipient list when you preview or complete the merge.

Creating a Personalized Greeting

You can also personalize the greeting line.

For example:

Dear «First_Name» «Last_Name»,

When the merge is completed, this might appear as:

Dear Maria Lopez,

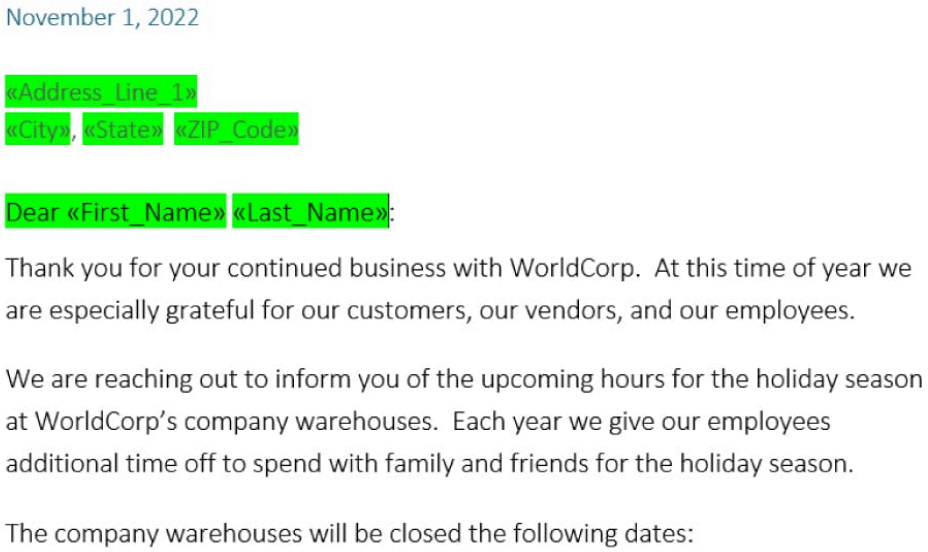


Figure 7. Placing merge fields in the business letter. Used with permission from Microsoft.

Important: Remove any temporary green highlighting used to identify the fields before completing the document.

Helpful Tip

You can also use **Address Block** and **Greeting Line** on the Mailings tab. These commands provide additional ways to insert recipient information.

If the information does not appear correctly, check that the field names match the columns in your recipient list.

Step 4: Previewing the Mail Merge

Before completing the mail merge, you should preview the results.

The **Preview Results** feature allows you to see how each personalized letter will appear.

How to Preview Your Letters

1. Click the **Mailings** tab.
2. Select **Preview Results**.
3. Review the first personalized letter.
4. Use the recipient navigation arrows to move between records.
5. Check that names, addresses, and greetings appear correctly.
6. Look for missing information, extra spaces, or formatting problems.
7. Make corrections before completing the merge.

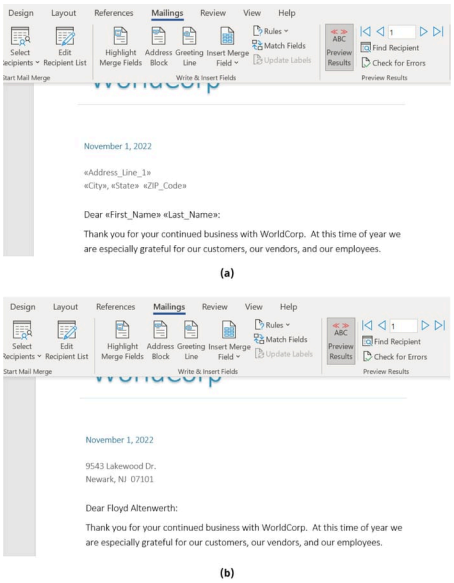


Figure 8. Comparing merge fields with the personalized preview. Used with permission from Microsoft.

What Should You Check?

Before finishing, confirm that:

- Each recipient's name is spelled correctly.
- The mailing address is complete.
- The greeting matches the recipient.
- There are no empty or misplaced fields.
- The document has consistent formatting.
- The business message is accurate and professional.

Step 5: Completing the Mail Merge

Once you have reviewed the personalized letters, you are ready to complete the mail merge.

How to Finish and Merge

1. Click the **Mailings** tab.
2. Select **Finish & Merge**.
3. Choose one of the available options:
    - **Edit Individual Documents:** Create a new Word document containing the merged letters.
    - **Print Documents:** Send the personalized letters to a printer.
    - **Send E-mail Messages:** Send personalized messages when the required email settings and recipient addresses are available.
4. For this activity, select **Edit Individual Documents**.
5. Choose **All** recipients.
6. Click **OK**.
7. Review the completed letters in the new document.
8. Save the merged document as **WorldCorp_Merged_Letters.docx**.

If your recipient list contains four customers, Word should create four personalized letters.

You can then print the letters or save a PDF copy for review or distribution.

Important Reminder

Saving the merged letters does not replace the original main document or recipient list. Keep these files if you plan to update and reuse the mail merge later.

Using the Step-by-Step Mail Merge Wizard

Microsoft Word also provides a **Step-by-Step Mail Merge Wizard** in supported desktop versions.

The wizard guides you through the mail merge process.

How to Open the Wizard

1. Click the **Mailings** tab.
2. Select **Start Mail Merge**.
3. Choose **Step-by-Step Mail Merge Wizard**.
4. Follow the instructions displayed in the task pane.

The wizard helps you select the document type, connect a recipient list, write the letter, preview the results, and complete the merge.

Other Ways Businesses Use Mail Merge

Mail merge can be used for more than business letters.

Common examples include:

- **Customer Notifications:** Send personalized announcements about business hours or policy changes.
- **Mailing Labels:** Print address labels for packages or letters.
- **Envelopes:** Prepare personalized mailing envelopes.
- **Event Invitations:** Create invitations with individual recipient names.
- **Email Messages:** Send personalized announcements to multiple recipients.

These tools can help businesses save time, improve accuracy, and communicate more efficiently.

Troubleshooting Common Mail Merge Problems

Problem: Recipient Names Do Not Appear

Possible Solution: Confirm that the correct recipient list is connected and that the merge fields match the field names in the data source.

Problem: Blank Spaces Appear in the Letter

Possible Solution: Check whether any recipients have missing information in the source list. Review the spacing and punctuation surrounding merge fields.

Problem: The Address Is Formatted Incorrectly

Possible Solution: Review the placement of the address fields. Make sure the street address, city, state, and ZIP code appear in the correct order.

Problem: Only One Letter Appears

Possible Solution: Check the recipient selection and confirm that you selected **All** when completing the merge.

Problem: The Recipient List Cannot Be Found

Possible Solution: Use **Select Recipients > Use an Existing List** to reconnect the correct file.

Practice: Creating Personalized Business Letters

Purpose: Practice using Microsoft Word's mail merge tools to create personalized business correspondence.

Scenario: You work for WorldCorp. Your supervisor asks you to notify four customers about upcoming holiday warehouse hours.

Part 1: Create the Main Document

1. Open Microsoft Word.
2. Create a professional business letter using the WorldCorp example.
3. Include the company name, date, message, and closing.
4. Leave space for the recipient's address and personalized greeting.
5. Save the document as **WorldCorp_Holiday_Letter.docx**.

Part 2: Create the Recipient List

1. Click **Mailings > Select Recipients > Type a New List**.
2. Include fields for first name, last name, street address, city, state, and ZIP code.
3. Enter four fictional customers.
4. Save the list as **WorldCorp_Customers**.

Part 3: Insert Merge Fields

1. Insert merge fields for the recipient's first and last name.
2. Insert the street address, city, state, and ZIP code.
3. Create a personalized greeting using the name fields.
4. Review the document's spacing and formatting.

Part 4: Preview and Complete the Merge

1. Select **Preview Results**.
2. Review all four recipients.
3. Correct any errors.
4. Select **Finish & Merge > Edit Individual Documents**.
5. Choose **All** recipients.
6. Save the completed document as **WorldCorp_Merged_Letters.docx**.

Reflection Questions

1. How does mail merge save time when communicating with multiple customers?
2. What is the difference between the main document and the recipient list?
3. Why is it important to preview the results before completing a mail merge?
4. What other business tasks could benefit from mail merge?

Key Takeaways

- Mail merge allows you to create personalized documents for multiple recipients.
- The main document contains the information shared by all recipients.
- The data source contains names, addresses, and other personalized information.
- Merge fields connect the main document to the recipient list.
- Preview Results helps identify errors before completing the merge.
- Finish & Merge allows you to create, print, or distribute personalized documents.
- Mail merge can be used for letters, labels, envelopes, invitations, and email messages.
- Accurate recipient information and careful review are essential for professional communication.

Link to Learning

For additional guidance, visit Microsoft's mail merge support resource.

You can also explore the original OpenStax mail merge practice document.

Source Attribution

This instructional content was adapted from OpenStax, Workplace Software and Skills, Section 5.02: Mail Merge in Microsoft Word, available through Workforce LibreTexts.

The material has been reorganized, simplified, and expanded with instructional steps, examples, troubleshooting guidance, and practice activities for Microsoft Word coursework at Lemoore College. Original source licensing, attribution requirements, and image permissions should be verified and retained.

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8.3: Creating Forms in Microsoft Word

Learning Objectives

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

- **Explain** the purpose of fillable forms in Microsoft Word.
- **Enable** the Developer tab in Word for Windows.
- **Identify and use** common content controls.
- **Create** text fields, checkboxes, drop-down lists, and date pickers.
- **Customize** form fields using Design Mode and Properties.
- **Design** a professional business form.
- **Protect and test** a fillable form before sharing it.

Introduction to Fillable Forms

Businesses often need to collect information from employees, customers, vendors, and other organizations.

For example, a company might need to collect contact information from new vendors or ask employees which office supplies they need.

Microsoft Word includes tools that allow you to create **fillable forms**.

A fillable form is a document containing interactive fields where users can enter information without having to redesign the document.

Common fillable form features include:

- Text fields for names, addresses, and comments
- Checkboxes for selecting options
- Drop-down lists for choosing from predefined answers
- Date pickers for entering dates
- Picture controls for inserting images

Fillable forms can help businesses collect information more consistently and reduce unnecessary editing.

Understanding Regular Documents and Fillable Forms

Imagine that WorldCorp needs to collect information from a new business vendor.

One option is to create a regular Word document with blank lines where the vendor can type their information.

However, typing on those lines may change the spacing or layout of the document.

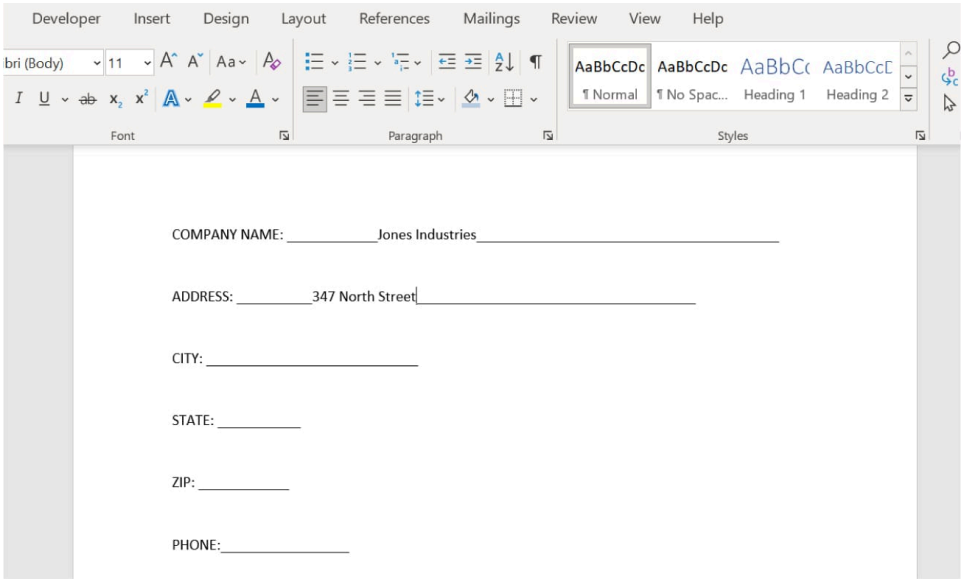


Figure 1. A regular Word document with blank lines for entering information. Used with permission from Microsoft.

A better option is to create a fillable form with designated input fields.

Instead of changing the document's formatting, the vendor can click inside each field and enter the requested information.

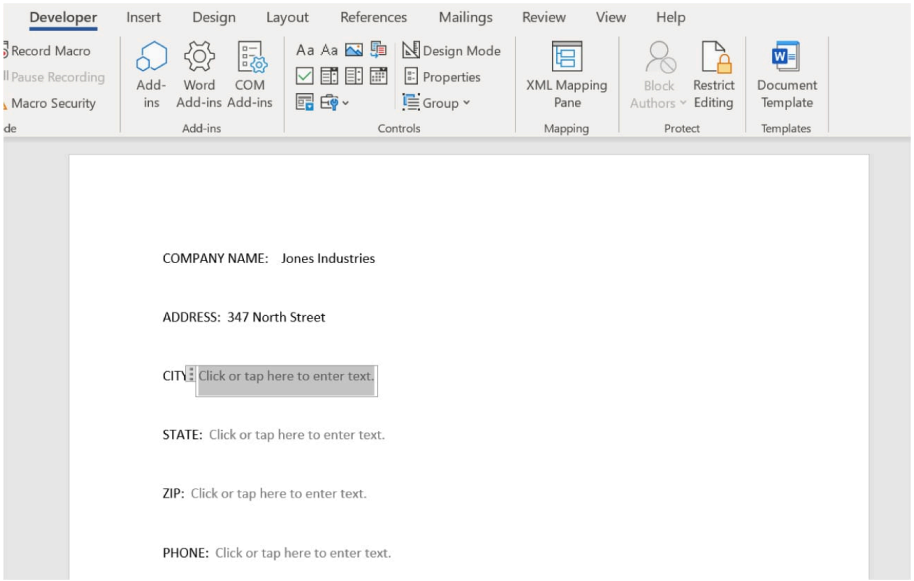


Figure 2. A fillable Word form with interactive text fields. Used with permission from Microsoft.

Fillable forms are especially useful when a business wants to collect the same information from multiple people.

Helpful Tip

Adding fillable fields does not automatically prevent people from changing the rest of the document. You must configure document protection separately if you want users to edit only the form fields.

Step 1: Enabling the Developer Tab

The **Developer tab** contains advanced Microsoft Word tools, including those used to create fillable forms.

In many installations of Word, the Developer tab is hidden by default.

How to Enable the Developer Tab in Word for Windows

1. Open Microsoft Word.
2. Click the **File** tab.
3. Select **Options**.
4. Choose **Customize Ribbon**.
5. Under **Main Tabs**, locate **Developer**.
6. Select the checkbox next to **Developer**.
7. Click **OK**.
8. Confirm that the Developer tab now appears on the ribbon.

The Developer tab includes tools for:

- Creating fillable forms
- Inserting content controls
- Customizing form fields
- Restricting document editing
- Working with macros and other advanced features

For this lesson, you will focus on the **Controls** tools and document protection features.

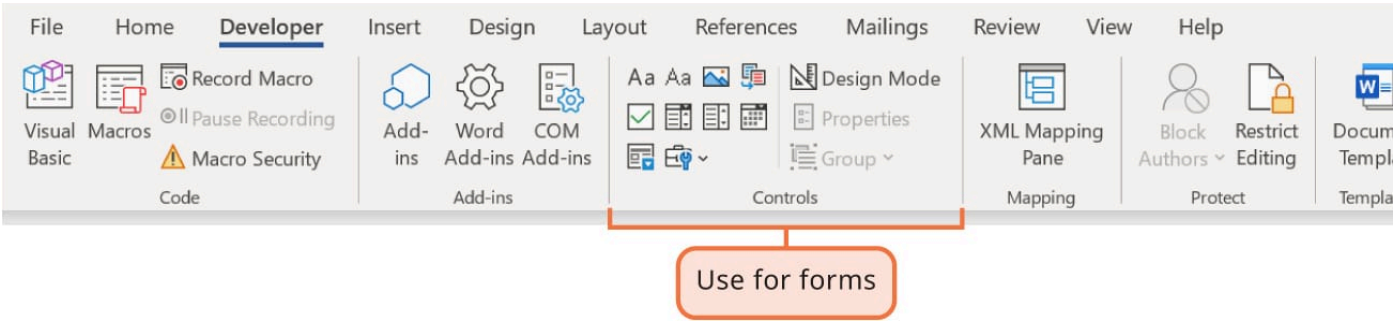


Figure 3. Common tools available in the Developer tab's Controls group. Used with permission from Microsoft.

Mac Tip

In Word for Mac, open **Word > Preferences** or **Word > Settings**, depending on the version. Then select **Ribbon & Toolbar** and enable the Developer tab.

This lesson focuses on Word for Windows. Some controls and protection features may behave differently on other platforms.

Step 2: Understanding Content Controls

A **content control** is an interactive field that you insert into a Word document.

Content controls tell users where and how to enter information.

For example, you can create a text field for a name, a checkbox for a yes-or-no question, or a drop-down list for selecting a department.

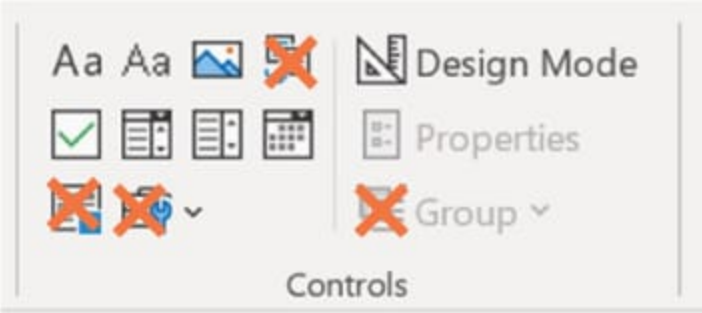


Figure 4. Identifying the content controls used in this lesson. Used with permission from Microsoft.

Common Types of Content Controls

Content Control	Purpose	Business Example
Plain Text	Allows users to enter text without rich-text formatting.	Employee name or phone number
Rich Text	Allows users to enter text with additional formatting.	Detailed comments or explanations
Picture	Allows users to insert an image.	Company logo or profile photograph
Check Box	Allows users to select or clear an option.	Requesting specific office supplies
Drop-Down List	Allows users to choose from predefined options.	Selecting a department
Combo Box	Allows users to choose from a list or enter their own response.	Selecting or entering a job title
Date Picker	Allows users to select a date.	Request date or delivery date

Plain Text and Rich Text Controls

Two common controls are **Plain Text Content Control** and **Rich Text Content Control**.

Plain text is useful when you want consistent formatting throughout the form.

Rich text is useful when respondents need to enter longer information that may include paragraphs or formatted text.

For example:

- **Plain Text:** Department name, employee name, or telephone number
- **Rich Text:** Detailed explanation of a supply request

Checkbox Controls

A **checkbox** allows users to indicate whether an option applies to them.

For example, an office supply form might ask employees to select the items they need:

- Letterhead paper
- Envelopes
- Notepads
- Pens
- Business cards

Checkboxes are useful when respondents may select more than one option.

Drop-Down Lists and Combo Boxes

A **drop-down list** allows users to select an answer from a predefined list.

A **combo box** provides predefined choices but can also allow users to enter their own response.

For example, WorldCorp might use a drop-down list containing:

- Corporate Headquarters
- Finance
- Marketing
- Operations
- Shipping

Drop-down lists are helpful when businesses want responses to use consistent categories.

Date Picker Controls

A **Date Picker** allows users to select a date using an interactive calendar control.

For example, WorldCorp might ask employees to enter the date they submitted an office supply request.

Step 3: Planning Your Fillable Form

Before adding interactive fields, you should plan what information your form needs to collect.

For this lesson, imagine that you work in WorldCorp's marketing department.

Your department is responsible for ordering office supplies containing the WorldCorp logo, including letterhead paper, envelopes, notepads, pens, and business cards.

Your supervisor wants you to create a **Quarterly Office Supply Order Form** that department office managers can complete electronically.

Information to Include

Your form should collect:

- Today's date
- Department name
- Office manager's name
- Whether supplies are needed
- Types of supplies requested
- Quantities requested
- Additional comments or special instructions

Using a Table to Organize the Form

One way to organize a form is to use a two-column table.

The first column contains the questions or labels. The second column contains the interactive fields.

How to Create the Form Layout

1. Open a blank Word document.
2. Enter the title **WorldCorp Quarterly Office Supply Order Form**.

3. Place your cursor below the title.
4. Click **Insert > Table**.
5. Create a table with **2 columns and 7 rows**.
6. Enter the questions or labels in the left column.
7. Leave the right column blank for the content controls.
8. Adjust the column widths so the questions are easy to read.

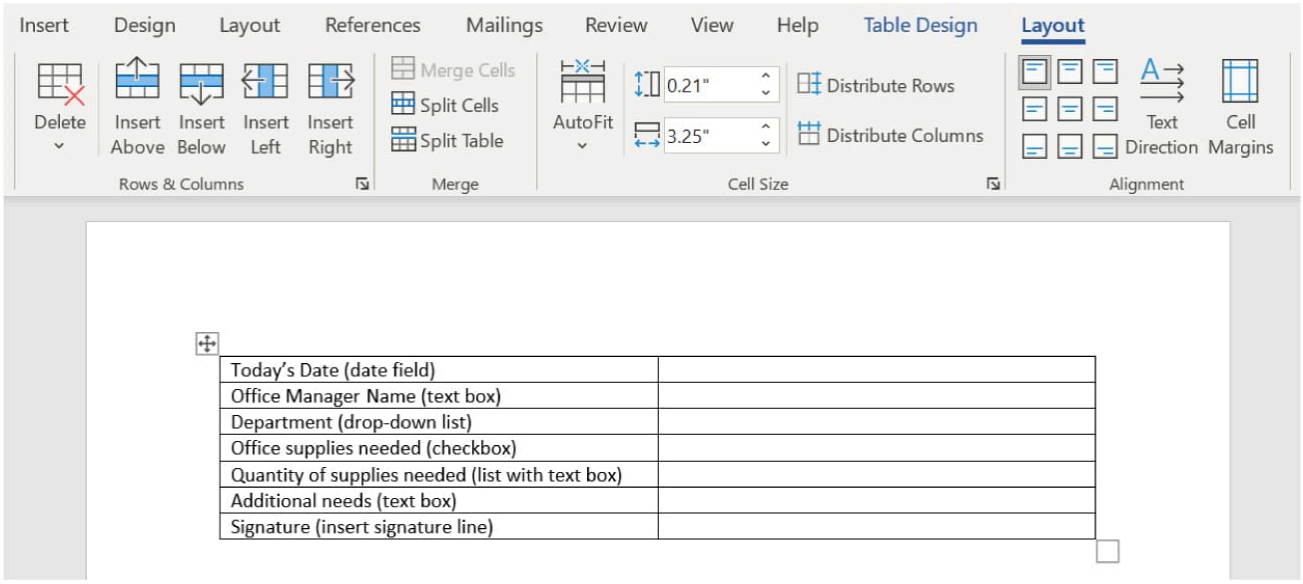


Figure 5. Creating a two-column table to organize a fillable form. Used with permission from Microsoft.

You can keep the table borders visible while creating the form. Later, you can remove them for a cleaner appearance.

Accessibility Tip

Keep questions short and clearly labeled. Use a logical reading order and avoid complicated merged cells. For accessible forms, consider whether a simple heading-and-field layout may work better than a table.

Step 4: Adding a Date Picker

Begin by inserting a Date Picker for the request date.

How to Insert a Date Picker

1. Click inside the cell next to **Today's Date**.
2. Open the **Developer** tab.
3. Locate the **Controls** group.
4. Select **Date Picker Content Control**.
5. Confirm that the date field appears in the cell.

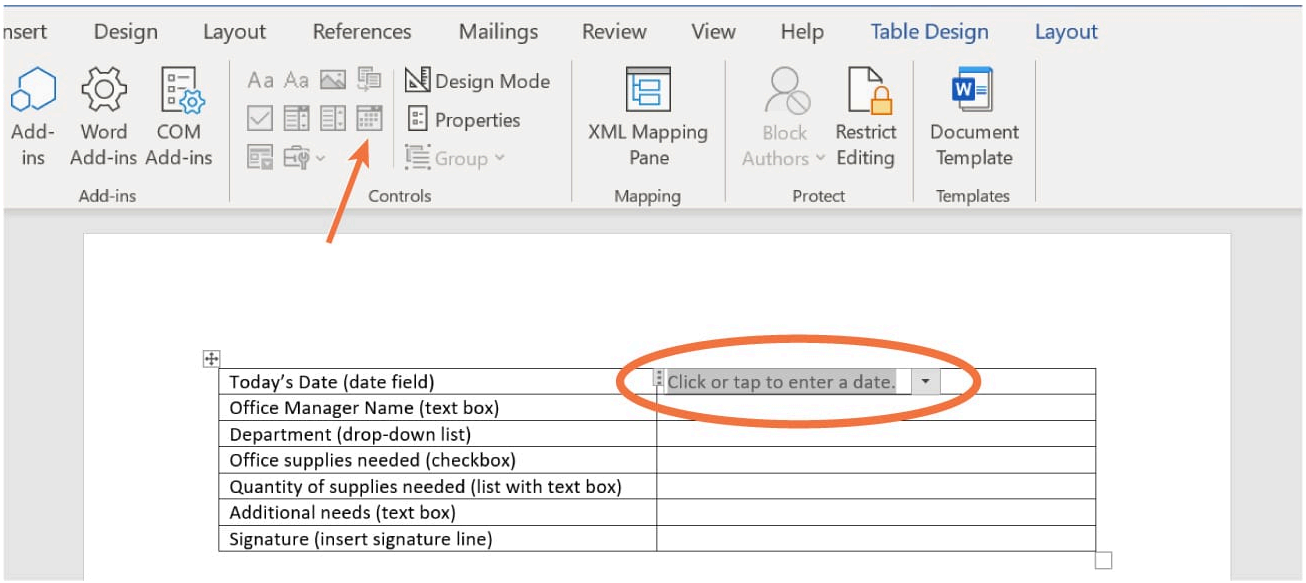


Figure 6. Inserting a Date Picker into the form. Used with permission from Microsoft.

By default, the field may display a message such as **Click or tap to enter a date**.

You can customize this message to make it more specific.

Customizing the Date Picker Instructions

1. Click the **Developer** tab.
2. Select **Design Mode**.
3. Click the placeholder text inside the date field.
4. Replace the default message with **Enter Today's Date**.
5. Click **Design Mode** again to turn it off.

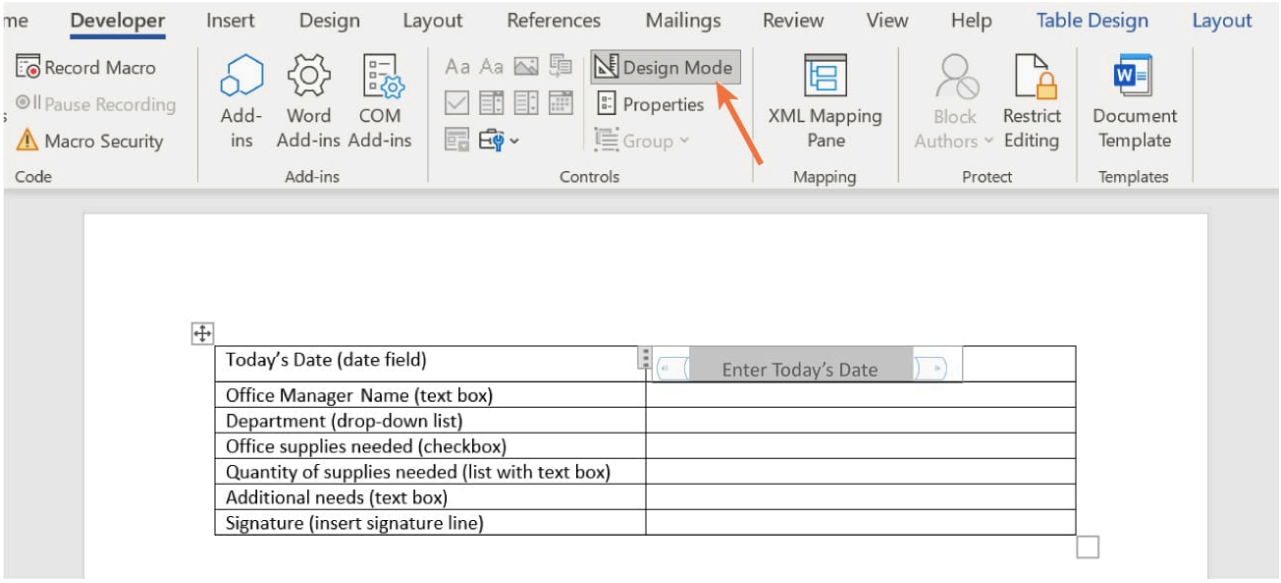


Figure 7. Customizing the Date Picker placeholder using Design Mode. Used with permission from Microsoft.

Clear instructions make the form easier for respondents to complete.

Step 5: Adding Text Fields and Other Controls

Next, add content controls for the remaining questions.

Inserting a Plain Text Field

1. Click inside the answer cell next to **Office Manager's Name**.
2. Open the **Developer** tab.
3. Select **Plain Text Content Control**.
4. Turn on **Design Mode** if you want to customize the placeholder.
5. Enter a helpful instruction, such as **Enter Your Full Name**.
6. Turn off Design Mode.

Inserting Checkboxes

1. Click where you want the checkbox to appear.
2. Open the **Developer** tab.
3. Select **Check Box Content Control**.
4. Type a label next to the checkbox, such as **Letterhead Paper**.
5. Repeat for additional supply items.

Inserting a Drop-Down List

1. Click inside the answer cell next to **Department**.
2. Open the **Developer** tab.
3. Select **Drop-Down List Content Control**.
4. Leave the control selected.
5. Click **Properties** to configure its choices.

You will learn how to add department names in the next step.

Reviewing the Form Layout

After inserting the fields, review the form's appearance.

Make sure:

- Every question has an appropriate response field.
- The labels and fields are aligned.
- The text is easy to read.
- There is enough space for longer responses.
- Instructions are clear and consistent.

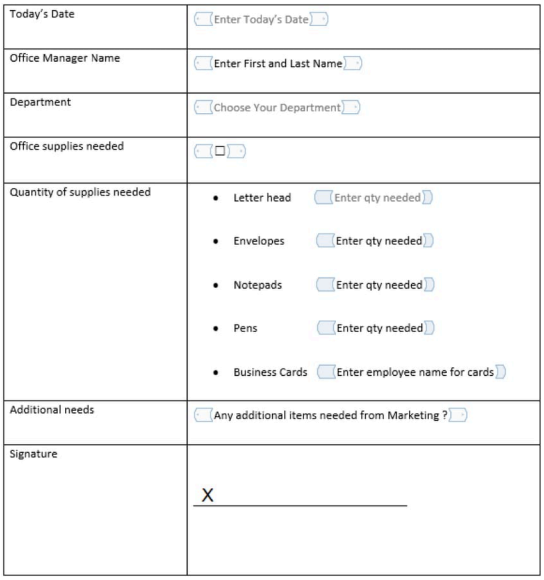


Figure 8. Organizing the completed form fields and adjusting spacing. Used with permission from Microsoft.

Step 6: Customizing Content Control Properties

The **Properties** command allows you to customize how a content control behaves.

Depending on the type of control, you may be able to change:

- The control's title
- The displayed placeholder
- The date format
- Drop-down choices
- Checkbox symbols
- Whether the control can be deleted

How to Open Content Control Properties

1. Click the content control you want to customize.
2. Open the **Developer** tab.
3. Select **Properties**.
4. Review the available settings.
5. Make your changes.
6. Click **OK**.

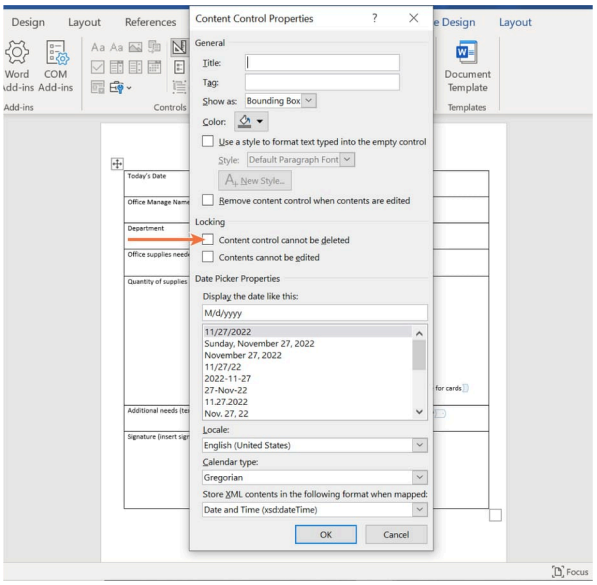


Figure 9. Reviewing content control properties and locking options. Used with permission from Microsoft.

Understanding Control Locking Options

Two important settings may appear:

- **Content control cannot be deleted:** Helps prevent the control itself from being removed.
- **Contents cannot be edited:** Prevents users from changing the content inside the control.

For a fillable form, do not enable a setting that prevents respondents from entering their answers.

These control-level settings are different from restricting editing for the entire document.

Step 7: Creating a Department Drop-Down List

A drop-down list is useful when respondents must select from a specific group of choices.

For the WorldCorp form, employees will select their department.

How to Add Drop-Down Choices

1. Click the department drop-down control.
2. Open the **Developer** tab.
3. Select **Properties**.
4. Locate the **Drop-Down List Properties** section.
5. Click **Add**.
6. Enter **Corporate Headquarters** as the Display Name.
7. Keep the Value the same unless your organization uses a different internal value.
8. Click **OK**.
9. Repeat to add Finance, Marketing, Operations, and Shipping.
10. Use **Move Up** or **Move Down** to arrange the choices.
11. Click **OK** to save the properties.

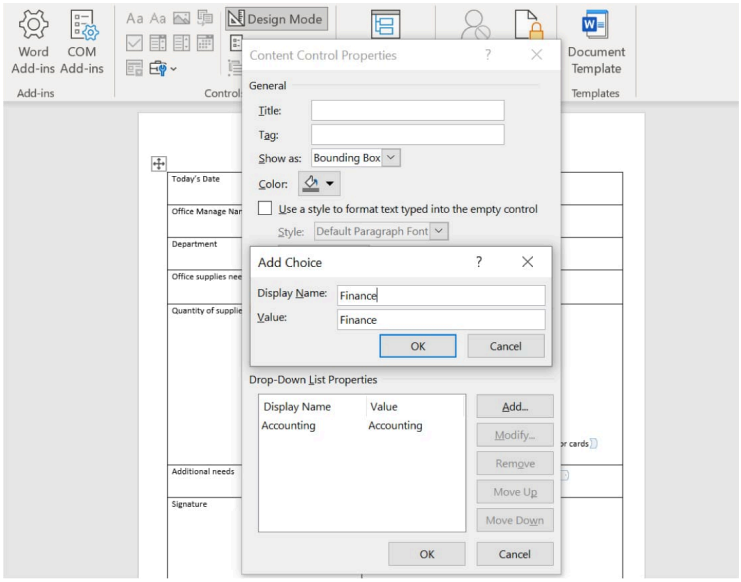


Figure 10. Adding choices to a drop-down list. Used with permission from Microsoft.

Display Name and Value

When adding a choice, Word may ask for two pieces of information:

- **Display Name:** The text the respondent sees in the list.
- **Value:** The underlying value associated with the choice.

For example, you could enter **Accounting** as the Display Name and **Acct** as the Value.

For most beginning forms, using the same text for both is the simplest option.

Step 8: Customizing Checkbox Symbols

Word allows you to customize the symbols used in checkbox controls.

For example, the default checked symbol may be an X, but you can select a different symbol.

How to Change a Checkbox Symbol

1. Click the checkbox control.
2. Open the **Developer** tab.
3. Select **Properties**.
4. Locate **Check Box Properties**.
5. Click **Change** next to the Checked Symbol.
6. Choose a symbol from the available fonts.
7. Click **OK**.
8. Review the checkbox to confirm the symbol is appropriate.

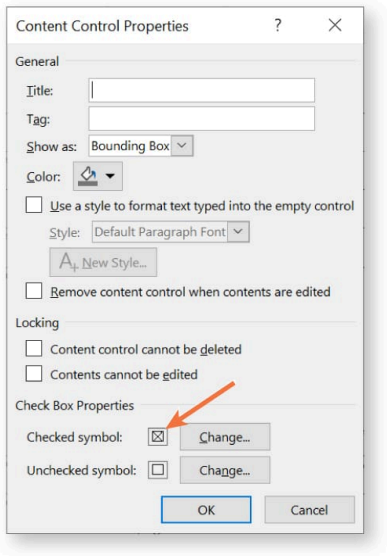


Figure 11. Changing the checked and unchecked checkbox symbols. Used with permission from Microsoft.

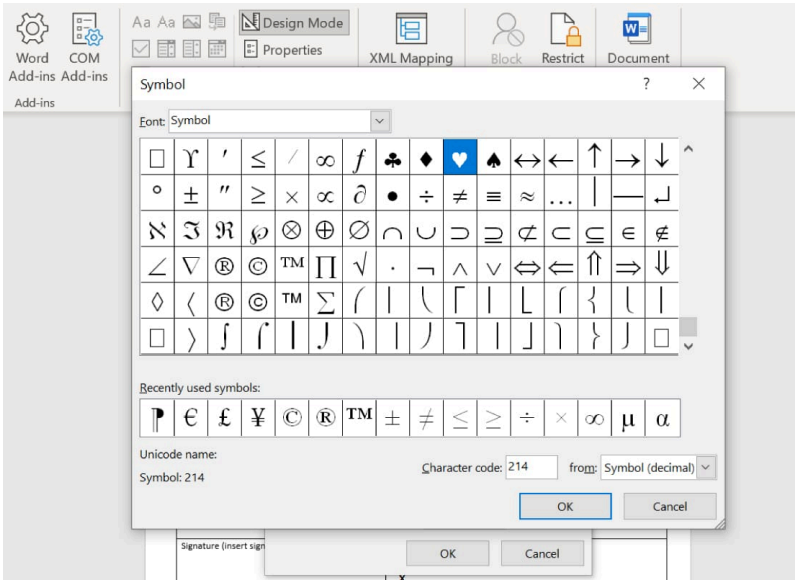


Figure 12. Selecting a different symbol for a checkbox. Used with permission from Microsoft.

Helpful Tip: For professional business forms, use familiar checkbox symbols that are easy to recognize. A checkmark or X is generally clearer than a decorative symbol.

Step 9: Formatting the Completed Form

Once the fields are working correctly, improve the document's appearance.

A professional form should be organized, consistent, and easy to complete.

Removing Table Borders

1. Click inside the form's table.
2. Select the entire table.
3. Open the **Table Design** tab.
4. Select the **Borders** menu.
5. Choose **No Border**.

6. Review the layout to make sure the labels and fields remain aligned.

Depending on your Word settings, nonprinting gridlines may still be visible while editing. These are different from printed table borders.

Improving the Form's Appearance

Consider the following improvements:

- Add the WorldCorp logo or company name.
- Use a clear, descriptive document title.
- Apply consistent fonts and spacing.
- Keep questions and fields aligned.
- Use sufficient contrast between text and background colors.
- Remove temporary instructions that respondents do not need.

Testing the Drop-Down List

After formatting the form, click the department drop-down list to confirm that all the choices appear.

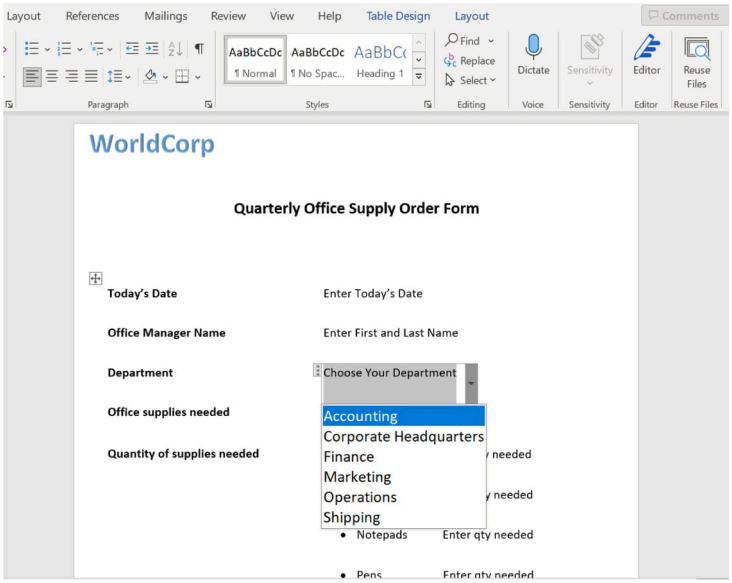


Figure 13. Testing the completed department drop-down list. Used with permission from Microsoft.

Step 10: Protecting the Fillable Form

After creating the form, you may want respondents to enter information only in the designated fields.

The **Restrict Editing** feature can help protect the document's structure.

How to Restrict Editing

1. Save a copy of your completed form before applying protection.
2. Open the **Developer** or **Review** tab.
3. Select **Restrict Editing**.
4. In the Restrict Editing pane, locate **Editing restrictions**.
5. Select **Allow only this type of editing in the document**.
6. Choose **Filling in forms**, if available.
7. Select **Yes, Start Enforcing Protection**.

8. Follow the prompts to apply protection.
9. Save the protected document.

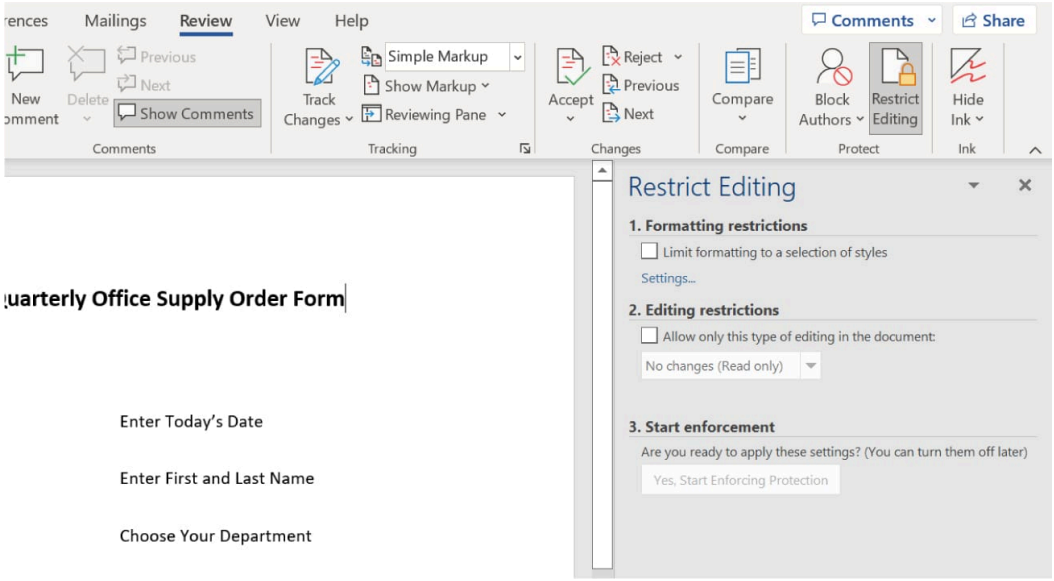


Figure 14. Applying editing restrictions to protect a fillable form. Used with permission from Microsoft.

After enabling protection, test the form to confirm that respondents can still use the intended fields.

Important Reminder

Editing restrictions help prevent accidental changes, but they should not be treated as strong security for confidential information.

If you use a protection password, keep it somewhere secure. Also, test all controls because some control types and protection settings may not work together as expected in every version of Word.

Step 11: Testing and Sharing the Form

Before distributing your form, test it as though you were a respondent.

How to Test Your Form

1. Save a separate test copy of the document.
2. Open the test copy.
3. Enter a sample name into the text field.
4. Select a date using the Date Picker.
5. Choose a department from the drop-down list.
6. Select and clear the checkboxes.
7. Enter sample quantities and comments.
8. Confirm that the document's layout remains organized.
9. Verify that editing restrictions work as intended.
10. Correct any problems in your original form.

Sharing the Form

Once your form is complete, you can distribute it to employees or other recipients.

For example, WorldCorp might send the form as a Word document attachment to each department office manager.

Include clear instructions asking recipients to:

1. Open the form in a compatible version of Microsoft Word.
2. Complete all required fields.
3. Save a completed copy using a descriptive file name.
4. Return the completed form using the approved method.

If the form is stored in a shared location such as OneDrive, check the sharing permissions. Editing a shared file may change the original document unless recipients are working with separate copies.

Troubleshooting Common Form Problems

Problem: The Developer Tab Is Missing

Possible Solution: Open **File > Options > Customize Ribbon** and confirm that Developer is enabled.

Problem: The Drop-Down List Is Empty

Possible Solution: Select the drop-down control, open Properties, and confirm that the choices were added.

Problem: The Placeholder Text Cannot Be Changed

Possible Solution: Enable Design Mode, select the placeholder inside the control, and edit the instruction text.

Problem: The Respondent Cannot Enter Information

Possible Solution: Review the content control's locking settings and the document's editing restrictions. Confirm that the intended fields are editable.

Problem: The Form's Layout Changes

Possible Solution: Review the table layout, cell widths, paragraph spacing, and the type of content control used.

Problem: Some Form Features Are Unavailable

Possible Solution: Confirm that you are using a compatible desktop version of Word. Some form-design and protection features may be limited in Word for the web or other versions.

Practice: Creating a WorldCorp Office Supply Order Form

Purpose: Practice creating and protecting a professional fillable form in Microsoft Word.

Scenario: You work in WorldCorp's marketing department. Your supervisor asks you to create a fillable form that department office managers can use to request branded office supplies.

Part 1: Create the Form Layout

1. Open Microsoft Word.
2. Enable the Developer tab.
3. Create a blank document.
4. Add the title **WorldCorp Quarterly Office Supply Order Form**.

5. Insert a two-column table with at least seven rows.
6. Enter the questions or labels in the first column.
7. Leave the second column for interactive controls.

Part 2: Insert Content Controls

1. Add a Date Picker for the request date.
2. Add a Plain Text control for the office manager's name.
3. Add a Drop-Down List for the department.
4. Add checkboxes for at least four types of office supplies.
5. Add text fields for requested quantities.
6. Add a Rich Text control for special instructions.

Part 3: Customize the Controls

1. Change the date placeholder to **Enter Today's Date**.
2. Add at least four department choices to the drop-down list.
3. Customize the placeholder text for the name and comments fields.
4. Review the checkbox symbols.
5. Make sure each control is appropriate for its question.

Part 4: Format and Protect the Form

1. Apply consistent fonts and spacing.
2. Remove the table borders if appropriate.
3. Add a company name or logo.
4. Save the document as **WorldCorp_Office_Supply_Form.docx**.
5. Apply editing restrictions that allow respondents to complete the form.
6. Test the form using fictional information.
7. Save a final copy after correcting any problems.

Reflection Questions

1. What is the difference between a regular Word document and a fillable form?
2. Why is the Developer tab important when creating forms?
3. When would you use a drop-down list instead of a text field?
4. Why should you test a form before sending it to employees or customers?
5. How can fillable forms improve business operations?

Key Takeaways

- Fillable forms help businesses collect information consistently.
- The Developer tab provides the tools needed to create interactive fields.
- Content controls include text fields, checkboxes, drop-down lists, and date pickers.
- Design Mode allows you to customize placeholder instructions.
- Properties allows you to configure control settings and response choices.
- Tables can help organize form labels and response fields.
- Restrict Editing can help protect a form's structure.
- Forms should be tested before distribution.
- Clear instructions, accessible formatting, and appropriate privacy practices improve the form-filling experience.

Link to Learning

For additional information about privacy considerations when collecting survey responses, explore the Information and Privacy Commissioner of Ontario's guidance on protecting individual privacy in survey research.

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This instructional content was adapted from OpenStax, Workplace Software and Skills, Section 5.03: Creating Forms in Microsoft Word, available through Workforce LibreTexts.

The material has been reorganized, simplified, and expanded with step-by-step instructions, accessibility guidance, troubleshooting, and a practical business activity for Microsoft Word coursework at Lemoore College. Original source licensing, attribution requirements, and image permissions should be verified and retained.

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