CPSI10003 MICROCOMPUTER APPLICATIONS 1 - PART 2: MICROSOFT WORD



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CPSI10003 Microcomputer Applications 1 - Part 2: Microsoft Word

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This text was compiled on 05/21/2026

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Detailed Licensing

Licensing

*A detailed breakdown of this resource's licensing can be found in **Back Matter/Detailed Licensing**.*

CHAPTER OVERVIEW

1: Microsoft Word- Setting a Foundation



Microsoft Word - Setting a Foundation

These pages explain the basics of using Microsoft Word to create clear and professional documents. They cover how to start and save files, format text and pages, and use tools like fonts, headings, and spacing to improve readability. They also show how to organize information with lists and hyperlinks, add visuals like pictures and tables, and apply styles and themes for a polished look. Overall, the focus is on making documents easy to read, well-organized, and visually appealing.

1.1: Microsoft Word- Setting a Foundation Sections

1.1.1: Introduction to Microsoft Word

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SECTION OVERVIEW

1.1: Microsoft Word- Setting a Foundation Sections



Microsoft Word - Setting a Foundation

This page discusses user interface elements for managing a guide, including actions for deleting tabs and managing settings. It outlines confirmation prompts for actions, character limits for text inputs, and the importance of user decision-making and organizational structure within the guide.

Topic hierarchy

1.1.1: Introduction to Microsoft Word

1.1.2: Creating and Saving a Word Document

1.1.3: Formatting Document Layout in Microsoft Word

1.1.4: Exploring the Home and View Tab of Microsoft Word

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1.1.1: Introduction to Microsoft Word

📌 Click here to view Microsoft Word Setting a Foundation Chapter

Microsoft Word Scenario

You have been tasked with writing a market trends report on the manufacturing division of WorldCorp's consumer goods company, which produces products such as televisions and computer monitors. A market trends report summarizes the current status of an industry, details the major competitors and their market share, and provides some information on where the industry is moving. You are the main document editor, but you need to get information from other WorldCorp employees in different departments, such as the manufacturing and the accounting departments, as well as from international business statistics databases. Creating this report will require a considerable amount of collaboration and sharing of information, as well as layout and design skills, to make the final report look good. The process of creating this market trends report will require a thorough, working knowledge of the program you are using to generate it.

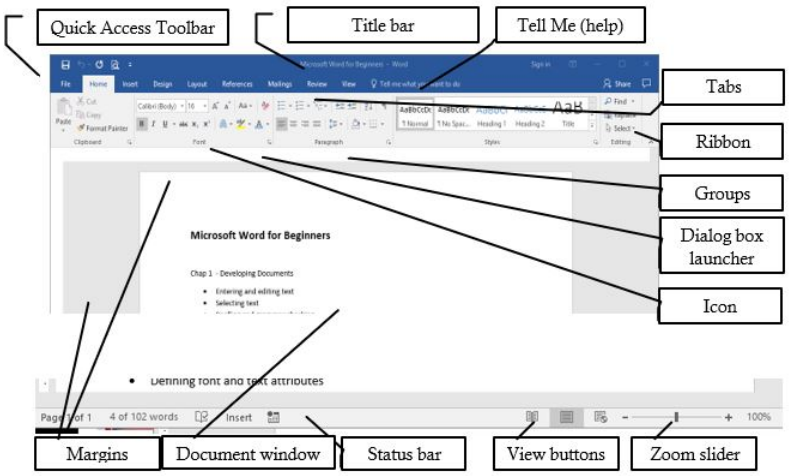


Figure 3.1: Many people use word processing software for a variety of purposes, such as writing a paper for an assignment, or creating a report for a manager. Companies often use both Microsoft Word and Google Docs in the workplace. (credit: modification of "WOCinTechChat" by wocintech (microsoft) - 175/Flickr, CC BY 2.0)

Microsoft Word and Google Docs are two of the more popular document preparation and editing software programs. Both programs have a distinct look and feel, as well as their own advantages. Word is full of powerful tools that can be used across different fields, from education to accounting. In contrast, Docs, a free application, has more user-friendly and collaborative features. Offices around the world use both tools for different purposes. First, you will learn about Word, and then Docs, building on the basics from the chapter on the Essentials of Software Applications for Business.

Exploring the Word Window

Get to know the elements of the Microsoft Word window!



Microsoft Word illustrated

- The **Quick Access toolbar** contains one-click buttons for saving, undoing, redoing, and print previewing a document. You can easily modify this toolbar to add your most frequently used commands. Just click the down-arrow on the right edge to customize this toolbar!
- The **title bar** displays the name of current document, and the program. A new document will default with a temporary file name, such as Document1 until you save the file with a different name. The Minimize, Maximize and Exit buttons appear on the right edge of the title bar.
- The **Tell Me** tool is a new way to get assistance with specific tasks in Word. When the user starts typing, Word suggests commands that are related to your keyword(s). The tool is context sensitive, and integrated into your current document versus opening a separate window. Therefore, if you type *insert picture* into the field, and click the resulting command, Word will open the Insert Picture dialog window without explaining the navigation instructions.
- The **Ribbon** interface is a set of toolbars at the top of the window in Office programs designed to help you quickly find the commands that you need to complete a task. The ribbon displays a combination of **icons** and **tabs**. Commands are **grouped** under multiple tabs. Some commands are so extensive that they need additional windows to display their entire functionality. The dialog box launcher icon will open these windows. Contextual tabs will appear only when the user needs them, such as when a picture is selected, or a table is inserted.

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
- Use the Navigation pane

Microsoft Word is a sophisticated word processing application. It completely transformed the document-creation process, replacing typewriters and existing word processing programs, such as WordPerfect and WordStar, with a user-friendly digital interface and hundreds of options for formatting. The comprehensive features allow users to easily adjust fonts and page layouts, insert graphics, track revisions, communicate collaboratively via comments, check spelling, search for text, and much more.

Let's get started on our market trends report. As you learned in the chapter on Essentials of Software Applications for Business, you should first open a new, blank document in Word. Using the default settings, type the following into the document:

> *Industry and Market Analysis*
>
> *The laptop industry is growing at a rather slow rate with sales expected to grow around 1% annually. Sales in the industry currently are over $20 billion. A large part of sales comes from consumer demand. There are several key players in the laptop industry. The*

> *largest companies in the industry in terms of consumer laptop ownership in the United States (market share) are HP, Dell, Apple, Acer, and Lenovo. Individuals can purchase a laptop at various price points based on the features, speed, and storage capabilities of the laptop. These companies also compete in the tablet industry and some consumers might make the decision to choose a tablet over a laptop. There are also laptops that are considered "convertible," meaning that they can be more like a tablet or a laptop with the screen feature that allows full rotation.*

You will use this text to build the framework for the market trends report as you move through the sections in this chapter and in subsequent chapters.

Tabs

Word comes with a set of default tabs (or menus), which are the interface for most of the functions and features you will use. Those tabs are File, Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, and Help.

Mac Tip

These same tabs are on the Mac Menu Bar, but the menu bar varies when you are in Word. There is no File tab on Word's toolbar in Mac. The default tabs you see depend on the settings you have selected. They usually are Home, Insert, Draw, Design, Layout, References, Mailings, Review, View, and Tell Me. You can access Word preferences and settings via the taskbar at the top of the screen.

Many of the features that are common among the tabs in Office were covered in the Essentials of Software Applications for Business chapter. In this chapter, you will learn more about how the tabs work in Word.

You can customize your menu bar by adding or hiding tabs, and by modifying the tools that appear on each tab. There are hundreds of commands you can choose from; the Word interface is highly customizable. Customization of the tabs was covered in the chapter on Essentials of Software Applications for Business. The next sections introduce some of the most important default tabs and their overall function, as well as the most-used commands, as Figure 3.2 shows.

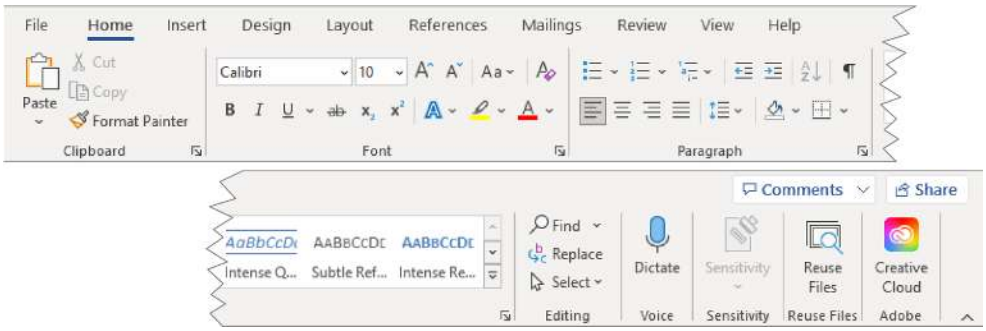


Figure 3.2: Notice there are several tabs, such as Home and Insert, that are common to all Office programs, as covered in Chapter 2. (Used with permission from Microsoft)

Home Tab

The Home tab is where you will spend most of your time, as it contains the formatting of fonts, alignment, headings, numbering, and lists, as well as the Find commands. It is also the default tab that displays when you open your document. We will go over the Home tab commands in detail in Formatting Document Layout in Microsoft Word.

Insert Tab

The Insert tab is useful for adding certain material into your document. The Insert tab also allows the user to include elements such as headers and footers, page numbers, page breaks, and bookmarks. We will review using these features in more detail in the chapter on Document Preparation.

Knowing how to use the Insert tab is particularly important for designing business documents, such as your WorldCorp market trends report. Your report will contain many pages and sections, as well as a table of contents and page numbers. It will also likely contain charts, graphs, and images, all of which need to be inserted into the document. For example, you could insert a chart of the top-selling TV screens (by using the Charts drop-down menu), then add a callout or label explaining the chart (by using the Shapes drop-down menu).

Layout Tab

The Layout tab is where you will configure your page setup. It includes commands for adjusting margins and the paper size, as well as options for shaping the text on the page with columns. The Paragraph command group is for adjusting the alignment of lists, body text, and objects such as pictures in your document. This tab also gives the user options for adding page breaks and line numbers.

Review Tab

If you are working with a team on your documents, you'll likely use the Review tab. This tab has a commenting function that allows users to add comments to a file, and to respond to each other's comments, as also discussed in the Essentials of Software Applications for Business chapter. As Figure 3.3 shows, the Review tab contains the Track Changes feature, which is helpful when many people are taking turns reviewing and contributing to a document. When Track Changes is turned on, edits to the document appear underlined and in colored text. Each user's edits will be colored differently to easily distinguish input from multiple people. This is particularly helpful when documents go through several revisions and are reviewed by many people. The market trends report for WorldCorp is a team effort, requiring several people to contribute to the final product. You can expect that as the document is created and revised, comments will be used to help reach the final version of the report.

The Track Changes process might feel familiar to you, as it is designed to mimic the act of marking up a paper document with a pen. You might have had someone work on your résumé or mark up a homework assignment of yours, using a red pen to make suggestions and revisions on the document itself. In a Word document, comments and Track Changes serve the same purpose as using a red pen on a paper document. This process will be covered in more detail later in the chapter.

The Review tab also has many commands that allow commenting and suggesting changes in documents that are used and edited by multiple people. Figure 3.3 shows two comments that users made by choosing the New Comment function. As people work on the document, they can read and respond to those comments, or remove them by clicking on them and selecting Delete in the Comments menu. There are also options in the Show Markup button found in the Tracking command group to display (or not display) formatting changes such as boldfacing or underlining.

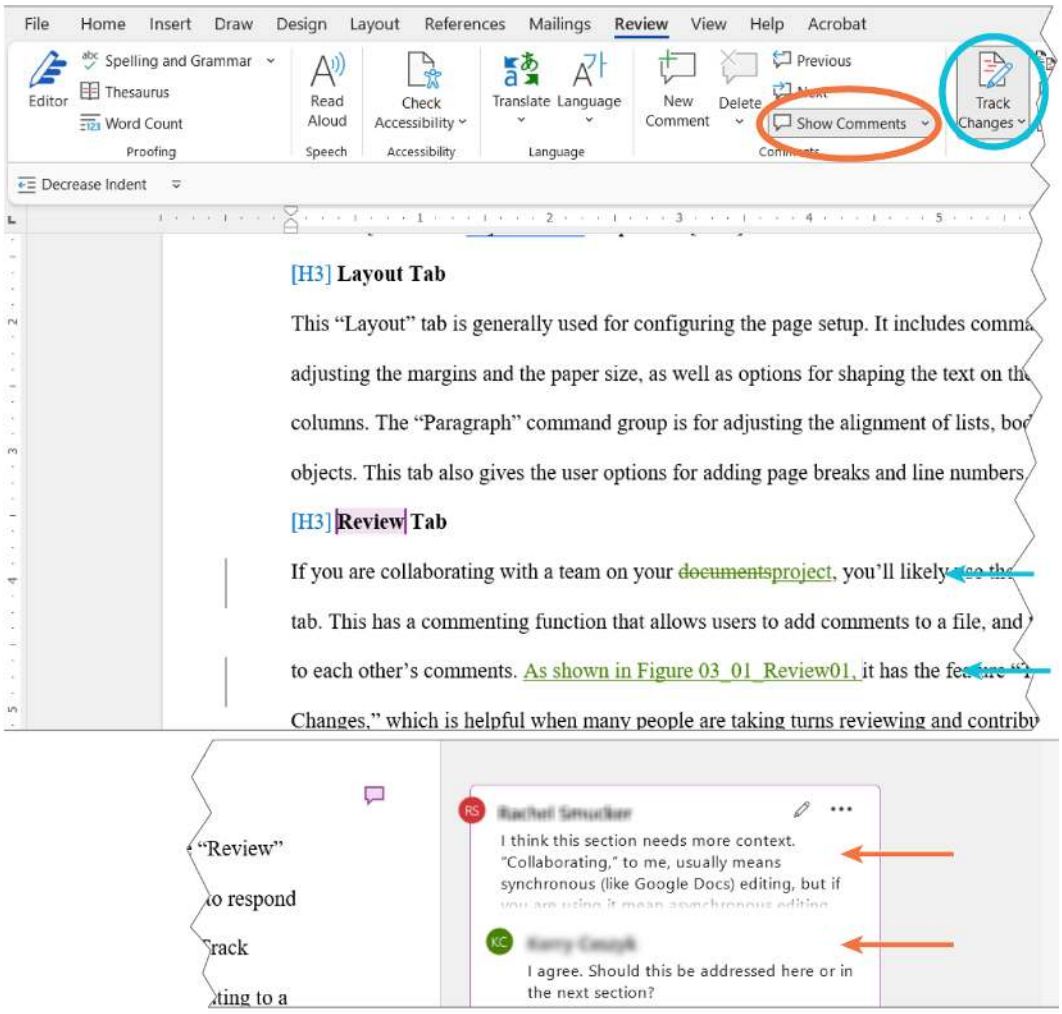


Figure 3.3: The Review tab in Word is helpful when multiple people are working on a document. It allows them to add comments and track revisions. The second comment is the lower one and is the reply to the one above it. (Used with permission from Microsoft)

Also on the Review tab, the Proofing command group contains helpful tools that you will use often when writing and editing a document. You can check your spelling and grammar, look up words in a dictionary or thesaurus, and keep track of your word count.

You will learn more about the Review tab and its features in Formatting Document Layout in Microsoft Word.

View Tab

The View tab is useful for changing how you see your document. For instance, it gives you the option of looking at your document one or two pages at time. You can also activate the zoom option from here, as well as add rulers and gridlines, which are helpful when placing objects, such as a table or picture, in the report you may be writing. You can also access the Navigation pane in the View tab. You may also use the read, print, or web viewing modes when typing, which give you different ways of seeing your document, as Figure 3.4 shows.

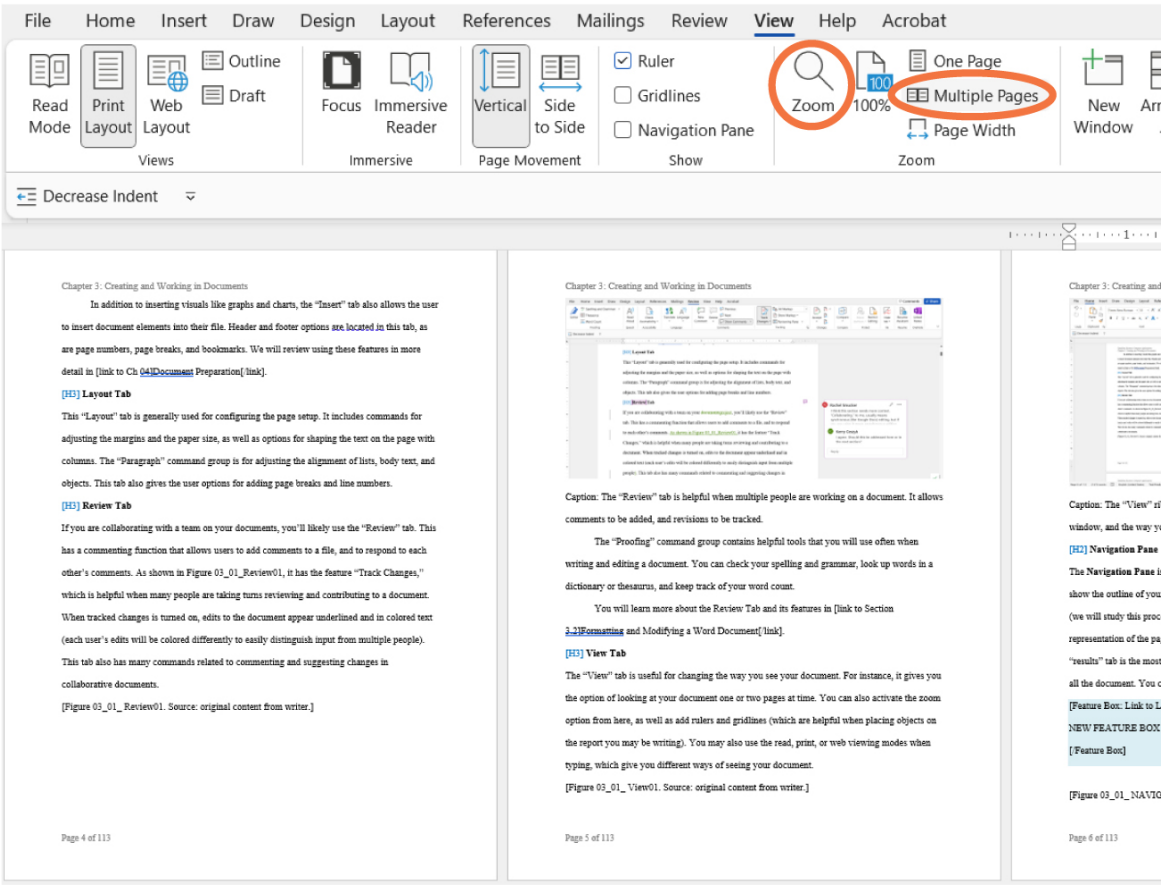


Figure 3.4: The View tab allows users to view documents in a variety of ways. The multiple pages selection, shown here, lets you see several pages at once. (Used with permission from Microsoft)

Navigation Pane

The Navigation pane serves various purposes. The Navigation pane is accessed directly by checking the box on the View tab in the Show command group. You can also get the Navigation pane by selecting Find from the Home tab. With either of these options, a pane will open on the left side of the screen. There are three tabs in the Navigation pane: Headings, Pages, and Results. The first tab, Headings, is the first thing you will see when you open the Navigation pane. This tab shows the outline of your document, but only if you have placed headings for each section and subsection (which you will learn more about in the section on Formatting Document Content in Microsoft Word). The Pages tab shows a thumbnail representation of the pages of the document. The Results tab is used for searching for a particular word, phrase, or number throughout the document, as Figure 3.5 shows. You can always activate the Find function with the Ctrl+F keyboard shortcut.

Mac Tip

To activate the Find function on a Mac, press Command+F.

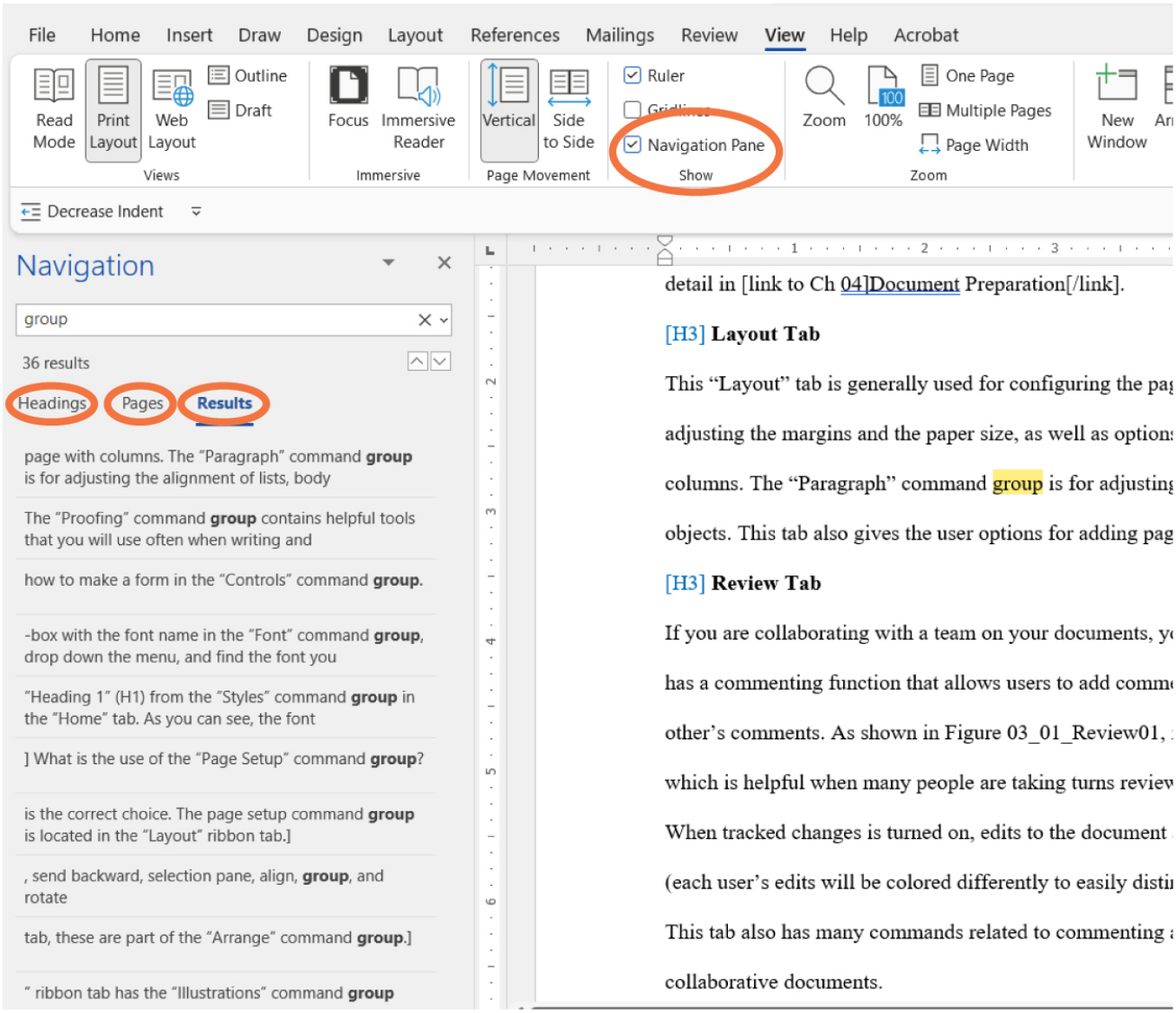


Figure 3.5: The Navigation pane is a sidebar that helps you move quickly from one section of your document to another, or locate a specific term or phrase through its search feature. (Used with permission from Microsoft)

Real-World Application

What Is a Document?

You will likely work in creating, editing, and consuming documents throughout your personal life and professional career. But what exactly is a document? Generally, a document is any type of file that contains information or transferred thoughts/ideas. While historically these documents were transferred to some type of paper or physical presentation on a chalkboard or displayed with an overhead projector, nowadays these are largely found in electronic format. However, when we are referring to a document with respect to Word, we are referring to a very specific type of file. This document file will contain primarily text and images that have been formatted and processed electronically. Hence, Word is a word processor, a type of program that contains a number of different text formatting capabilities for producing primarily text-based files and documents. This is an important distinction, as you can create any number of different text-based files in several different programs.

There will be times when you may not have access to Word or another word processing program. Many computers, and even some portable devices, will come with a preinstalled basic text processing as part of their operating system. Notepad is one example. While you will not be able to format the text (not even bold, italic, or underline), you can capture basic text

> information and save it as a basic text file (.txt) to your computer. This can be useful for jotting down quick notes—hence the name Notepad. Then, later, when you have access to Word, you can copy and paste the text from Notepad into Word, where you can format it and incorporate it into other documents if needed.

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1.1.2: Creating and Saving a Word Document

📌 Click here to view Microsoft Word Setting a Foundation Chapter

Creating a Word Document

Before beginning to use Microsoft Word, your first step should be to take some time to plan your document. Better document planning will save you time and ensure your document is written to the correct audience with the right message and visual appearance. Some aspects to consider before writing a document include:

- Purpose of the message- why are you sending the message?
- Who is your audience? What type of writing or visual style will appeal to them?
- What type of communication will you send? Will it be a newsletter, professional letter?
- Will you need outside information like graphics or charts?
- Is there any research you need to conduct before beginning to write?

Now that you have a plan, let's write a document.

Saving a Word Document

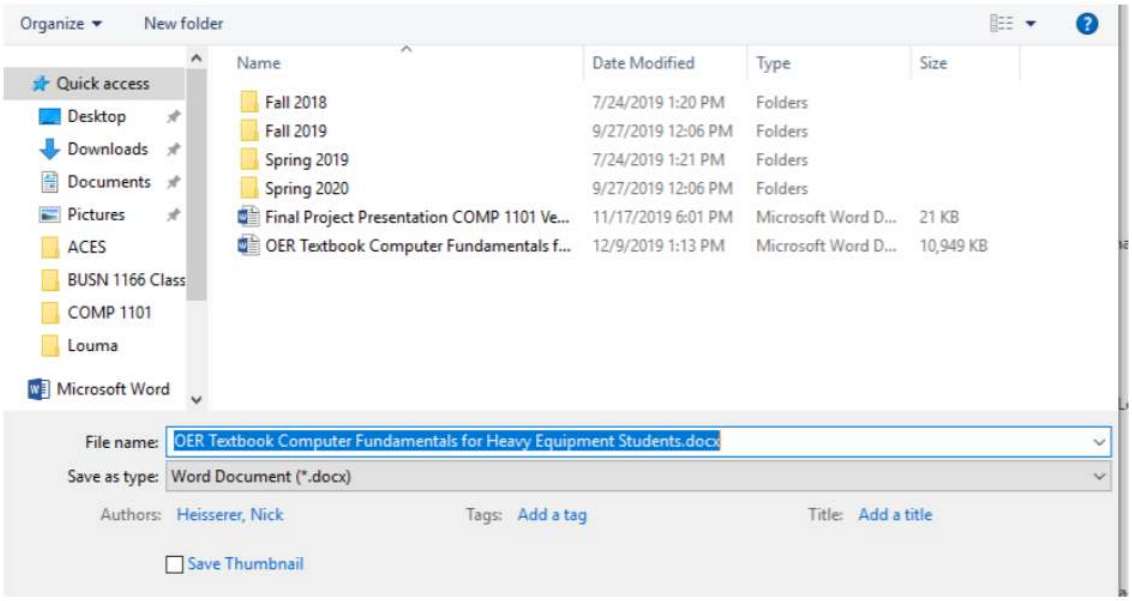
Once you have successfully entered text into your document, you should get into the habit of saving work. Saving your work often is a good idea in the event of a computer error or power outage that could cause you to lose your progress. While Word does have an Autosave feature that can be helpful to recover most of your document, saving your work regularly is the sure-fire way to make sure your work is not lost.

To save your work in word, you can do one of the following:

- Keyboard Shortcut: “Control + “S”
- Quick Access Toolbar: Use the Disk/icon in the upper left-hand corner of the screen.
- Backstage View: Click on “File” in the Ribbon and navigate to “Save” on the left side of the backstage view.

Difference between “Save” and “Save As”

Microsoft Word has two different Save commands: “Save-As” allows you to name the file and save it in a location of your choosing. “Save” keeps the same file name and location. If you have never saved a file before, pressing “Save” will take the user to the “Save-As” menu of options. When completing the “Save As” command, Word will also allow you to save the document as another file type, like a portable document format (pdf) file, or other types.



1EXAMPLE OF THE "SAVE-AS" DIALOG BOX.

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1.1.3: Formatting Document Layout in Microsoft Word

📌 Click here to view Microsoft Word Setting a Foundation Chapter

Learning Objectives

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

- Format page setup and margins
- Create different types of sections and modify section formatting

At WorldCorp, each major division represents a product line. All these divisions have their own functional departments, such as finance, marketing, manufacturing, research and development (R&D), and logistics. To write your report on market trends, you will need to get information on the products from these different departments. For example, the marketing department might provide sales data for a particular product, while the finance department can provide the profit made for each product sold. Practically speaking, this means creating a document that is readable and easy to use for everyone.

Setting the page layout for your document in Microsoft Word allows you to present material in a way that maximizes ease of use. Page layout includes setting margins and page size, choosing the page orientation, introducing features like columns, and breaking up a document into sections so that different parts can have different formats applied. These functions can be accessed using the tools on the Layout tab (see Figure 3.6).

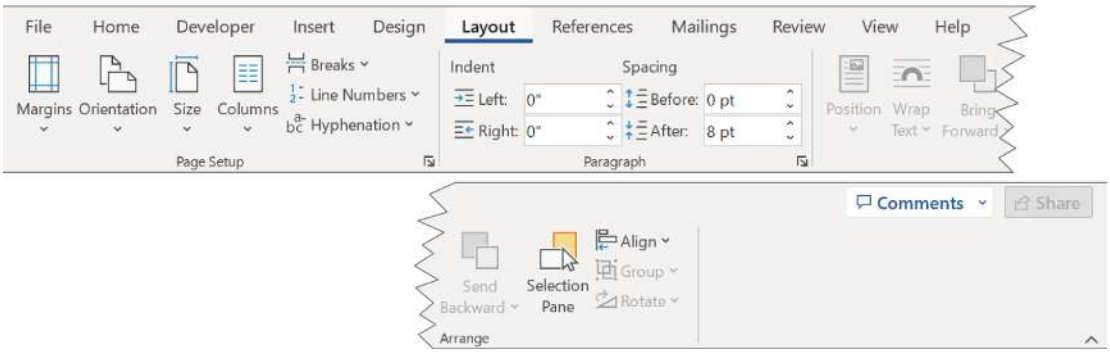


Figure 3.6: The Layout tab has clearly defined drop-down menus and buttons for its page layout tools. (Used with permission from Microsoft)

Page Setup

The Layout tab contains commands and tools for adjusting the overall page setup of your document, located within the Page Setup command group. Page setup typically includes adjusting the paper size, margins, and orientation, as well as adding features like section breaks and columns. There are accepted standards for document formatting, but these can vary by target audience and by industry. For business reports, such as your market trends report, a 12-point font for body text (Calibri, Times New Roman, and Cambria are some popular fonts), and one-inch margins on all sides (top, bottom, left, right) are typically standard. Most reports also have sections and section headings to help break up and organize the content. The line spacing in the reports can vary, but the most common spacing will be either single-spacing, 1.5-spacing, or double-spacing.

Each of these elements has an important role to play in presenting the document to its audience (e.g., business professionals), as well as an impact on readability. Some fonts are easier to read than others, or are more appropriate for a specific genre of document. You may use a style guide (a manual for consistent styling and editorial treatment) like the *Chicago Manual of Style* or the *Modern Language Association* (MLA) style for published corporate reports, but many businesses do not strictly follow a manual of style for internal reports. For reports like your market trends report, it is usually left up to the employee or the supervisor to determine the best formatting and style for the report. For reports that will be distributed externally, such as at a conference, you should ask colleagues in charge of these events if they have formatting and style requirements for documents. It is important to keep the intended audience in mind when setting up the document.

Real-World Application: Style Guides

Different industries will establish certain expectations around the types of documents that are typical of their field, as well as how these documents are formatted and presented. For instance, newspapers will use a certain type of font and use only certain types of formatting options. They will also define the paper size, margins, and how the content is laid out on the page. If you review a handful of different printed newspapers, you will find that each has a very specific style and that no two really look alike, although we recognize that they are newspapers because they share a subset of agreed-upon standards (such as page size). So too, will you find that your industry has a specific style, and in your studies, you will be asked to adopt different writing and formatting standards. These are known as style guides, or style manuals. Common ones you may encounter while in college are the APA (*American Psychological Association*) and MLA (*Modern Language Association*) style manuals; however, others exist, including ones used in specific industries, such as the CSE (*Council of Science Editors*) style used in biology and other sciences. These guides will define how documents should be formatted in their entirety, from font type to the general layout of pages, including margin width and line spacing. It is important to know that these styles are updated regularly. You will want to stay abreast of these updates. To make this easier, most major style guides, such as APA and Chicago, have websites that provide information about updates. To ensure that you stay informed, some of these websites offer subscriptions for information about updates.

While Word does not come preset with these formatting requirements, you can create your own style sets, which you will learn more about in later chapters. What's more, there are many online resources that can help guide you in these formatting requirements. For instance, the reference or citation page tends to be a sticky spot for many students. There are several citation styles in the citation tool in Word. There are also many free online services that can help you create your reference list by inputting relevant information into guiding categories. They then generate your reference list for you. A word of caution: You should also review and verify if the produced content does align with the formatting requirements of that style. Styles do change and are updated, and these services do not always remain current.

Margins

All pages in a document have a margin, a blank area from the edge of each side of the page to the content. Margins make a page more readable, and in printed documents, allow space for bindings, notes, and so on. You may encounter projects that need different margins on different pages, or unconventional margins—that is, custom margins.

To adjust the margins of a page, go to the Layout tab. Select the Margins icon, and a drop-down menu will appear. The default margin is Normal (1 inch on all sides), but this can be adjusted via the prepopulated options, such as for different layouts with narrower margins. If you want to set your own margins, choose the Custom Margins option at the bottom of the drop-down menu. In the dialog box shown in Figure 3.7, notice how you can adjust the margins to be various measurements.

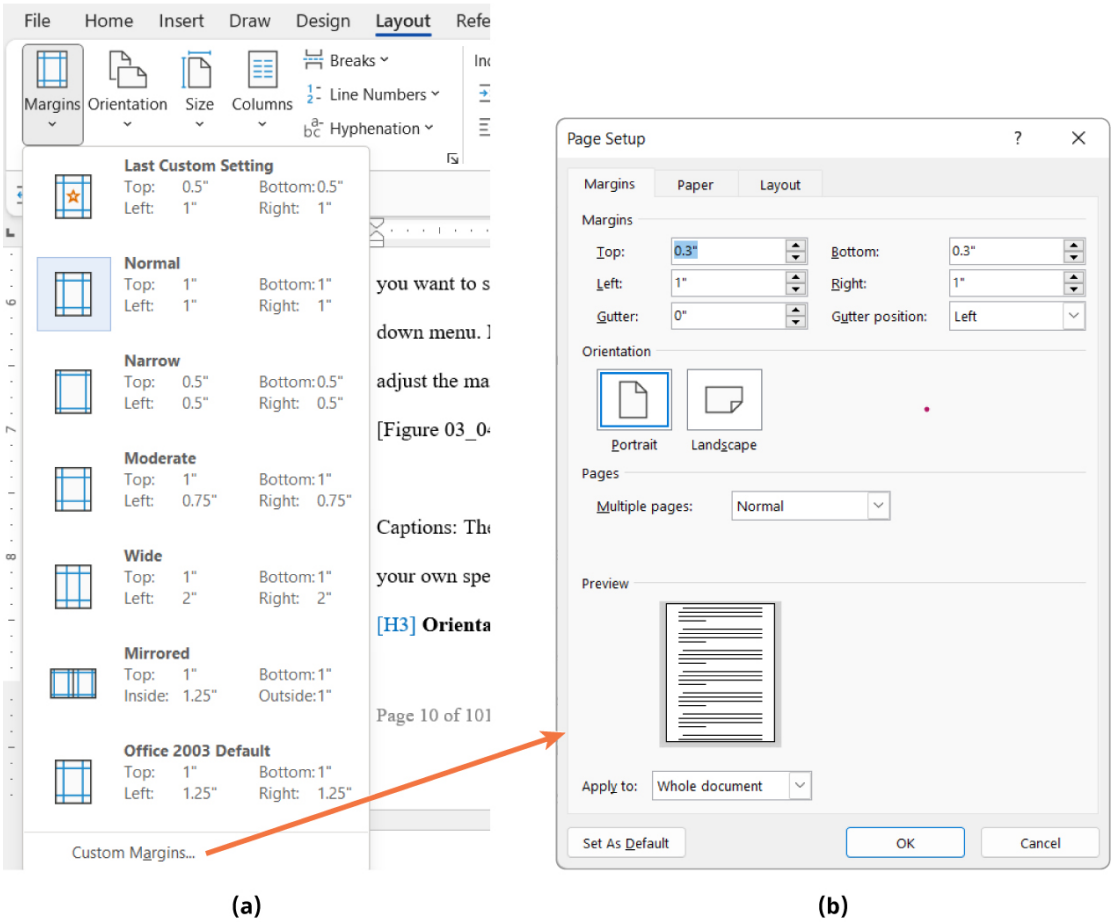


Figure 3.7: The Margins tab in the Page Setup dialog box lets you (a) choose from predetermined selections, or (b) create your own specifications through the custom margin dialog box. (Used with permission from Microsoft)

Orientation

Page orientation refers to whether the page is vertical or horizontal. The default in Word is the vertical layout, called portrait orientation. This layout works best for everyday text documents, such as business reports and correspondence. The horizontal layout is known as landscape orientation, and works best for documents with tables and graphs that otherwise would not fit well on a vertical page. Using the Orientation command in the Page Setup command group, you can alter the orientation of your entire document, or also limit the changes to certain pages or sections. Figure 3.8 shows the two layout options.

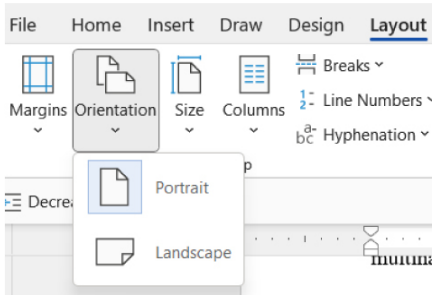


Figure 3.8: Inserting sections in your document allows you to change the page orientation between sections. (Used with permission from Microsoft)

Line Spacing

The space between lines of text as you move through the document is referred to as line spacing. You might be familiar with double-spacing, which is often required when creating documents for a class assignment. However, the default in Word is single-spacing. To change the line spacing, access the Line and Paragraph tool from the Paragraph command group on the Home tab

(Figure 3.9). To change the spacing of text that has already been typed, select the text and change the line spacing to the desired spacing. You can also set the spacing before typing anything in the document.

The line spacing can vary throughout the document. It does not have to be consistent. You can, at any point, change the line spacing by selecting the text you want to apply the different spacing to, and then selecting the spacing from the Line Spacing tool on the Home tab. But keep in mind the professionalism of the document you are preparing. It is not advisable to vary the line spacing throughout the document, as that can impact the readability of the report. It can also look as if you did not take care to ensure consistency in formatting when preparing the report. However, if you have a few sentences that need to stand out for some reason —such as a table caption, or a block quote—having these elements set with a different line spacing might be appropriate.

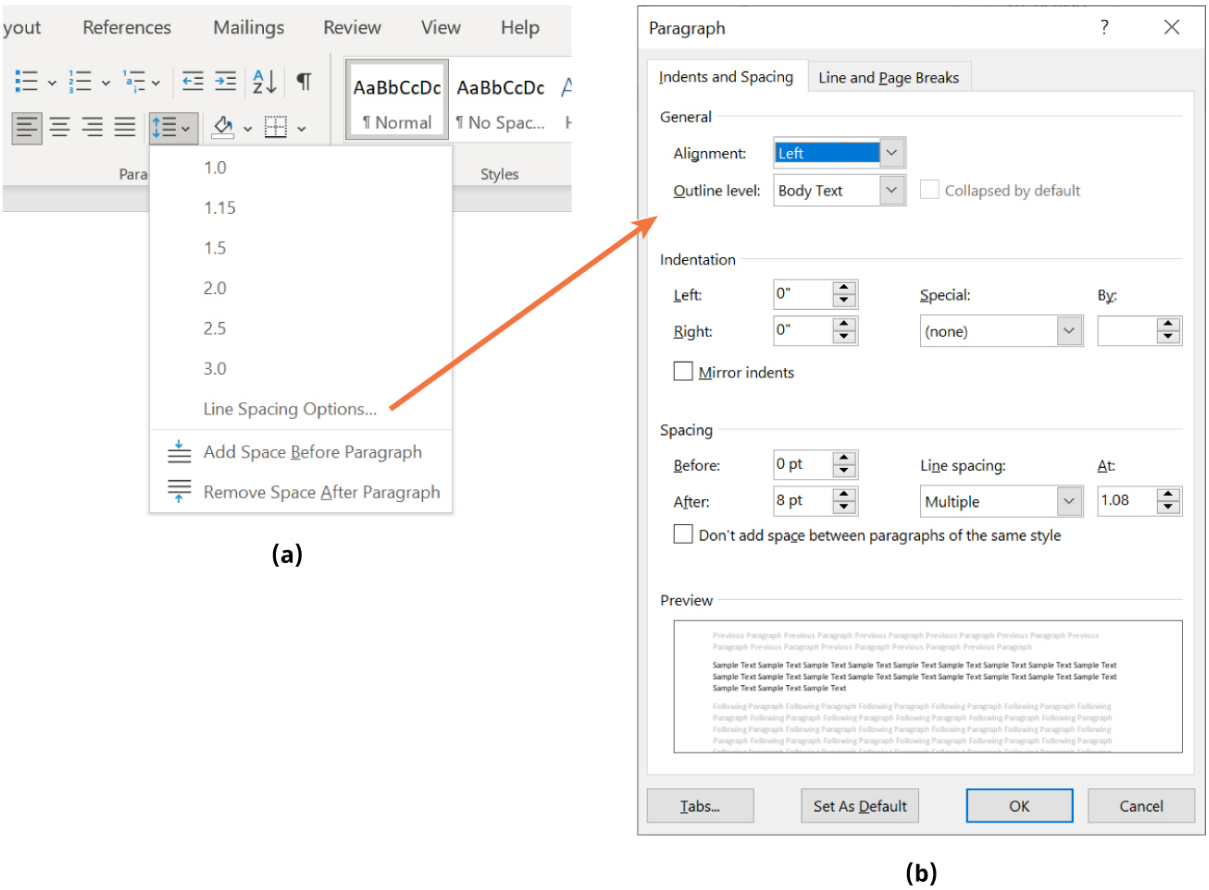


Figure 3.9: (a) You can change the line spacing of a document by using the tool in the Paragraph command group. (b) There are additional options for indentation and line spacing by selecting Line Spacing Options. (Used with permission from Microsoft)

Through the Line Spacing Options tool, you can change the spacing before and after lines of text, the spacing before and after paragraphs, and the indentation of lines of text.

Page Size

Understanding page size is particularly important when working at a global corporation like WorldCorp. Different countries use different standard page sizes, and it is helpful to know how documents might vary across various company locations. For example, the United States uses standard letter size (8.5 inches wide by 11 inches long), whereas Europe and East Asia typically use A4 size (8.25 inches wide by 11.75 inches long).

Similar to margin selection, when you select the Size command, there is a drop-down list of default pages sizes, as Figure 3.10 shows. You can select from these options or choose to create a custom page size. Note that the size selections include materials other than standard pages, such as envelopes.

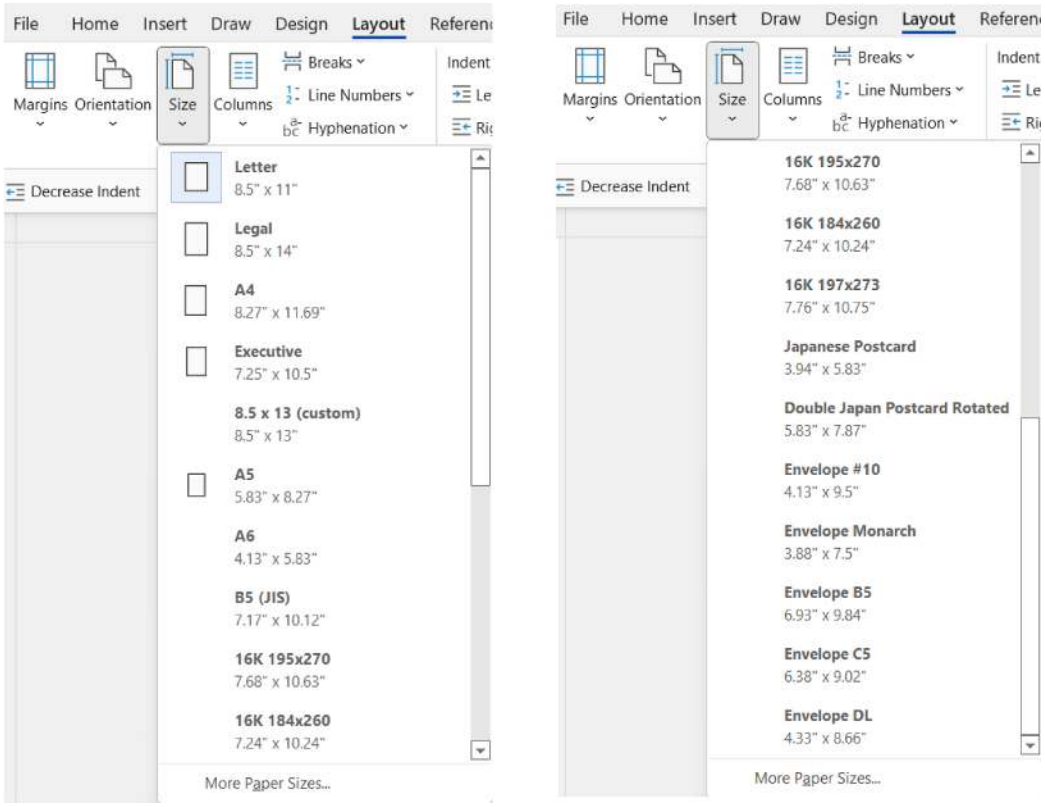


Figure 3.10: You can select from a variety of predetermined page sizes for your document, or create a custom paper size if desired, such as for a poster or invitation. This figure shows the entire drop-down list as two panels. (Used with permission from Microsoft)

Columns

You may be familiar with the column format in print media such as newspapers and magazines, where the text on a page is separated into multiple, vertical columns. Sometimes columns are desired in specific types of Word documents, such as newsletters or brochures. They can also be useful if you have a long list of short terms and want to optimize page space by utilizing columns instead of having a large expanse of white space.

Word has many options for creating columns. To do this, you can select a section of text, go to the Columns drop-down menu, and select from common column layouts. Menu options include columns of equal size, or options where there is one narrower column on the side of a wider column. If you want to customize a column to be of a specific width, or you want more than three columns in one page, choose More Columns. In Figure 3.11, you can see the options. The dialog box shows a preview of how the document will look. A line between the columns is possible, as seen in the dialog box.

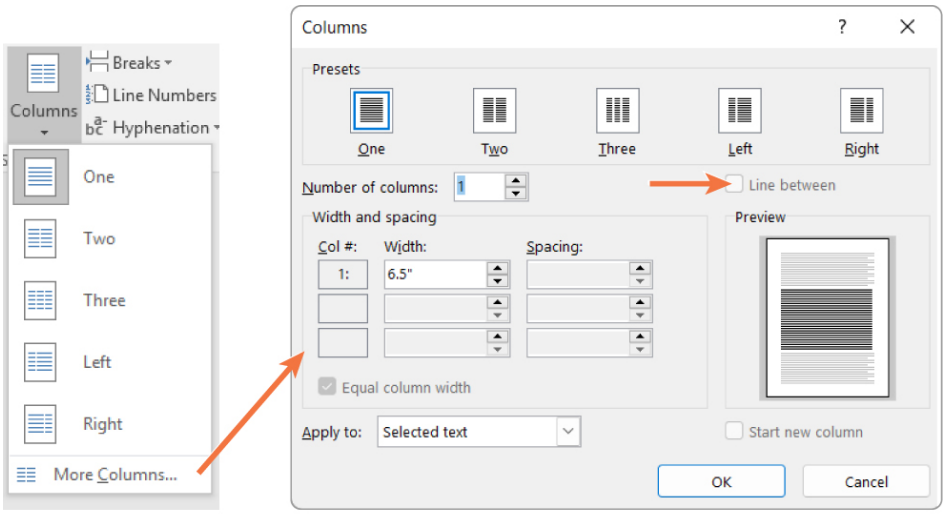


Figure 3.11: (a) More Columns opens a window where you can (b) customize their width and spacing. Columns are common in certain types of documents, such as newsletters and brochures. (Used with permission from Microsoft)

Working with Section Breaks

Sections in Word are especially useful for long documents. A section allows the user to partition part of the document, such as front matter, body text, and back matter, and apply different styles and formatting to each section, while still maintaining all the text in one document. Sections are also important when creating a table of contents and assigning page numbers in a large report. These concepts will be covered in more detail in the chapter on Document Preparation.

The division of a document into front matter, body text, and back matter is more common in longer documents, such as extensive reports, booklets, and manuals. Front matter typically includes the title page, the table of contents, and prefaces or forewords. The body contains the main text of the document. The back matter may include appendixes, an index, a glossary, or references.

Regardless of how you partition a document, having sections allows you to apply different styles to each separately, including page numbering, page orientation, and formatting. Consider an example where your document has a title page and a table of contents, and the main text begins on the third page. You don't want a page number to appear on the title page, but you would like the main content to start on page 1. You can achieve this with a section break.

First, go to the Insert tab, select Page Number, and add page numbers to your document. The market trends report is expected to be quite lengthy. Including page numbers in the WorldCorp market trends report will be essential to help readers navigate through the document to the areas that are of interest to their needs.

To insert a section break, go to the Layout tab, click on the Breaks drop-down menu, and select the Next Page section break, as Figure 3.12a shows. This will start a new section on the next page. Then, choose where you want your page number to appear. As Figure 3.12b shows, it will be on the bottom right. Then, right-click on the page number in that new section and choose "Start at 1" from the dialog box that appears. You can use this feature to apply different page numbering styles, such as using Roman numerals in front matter.

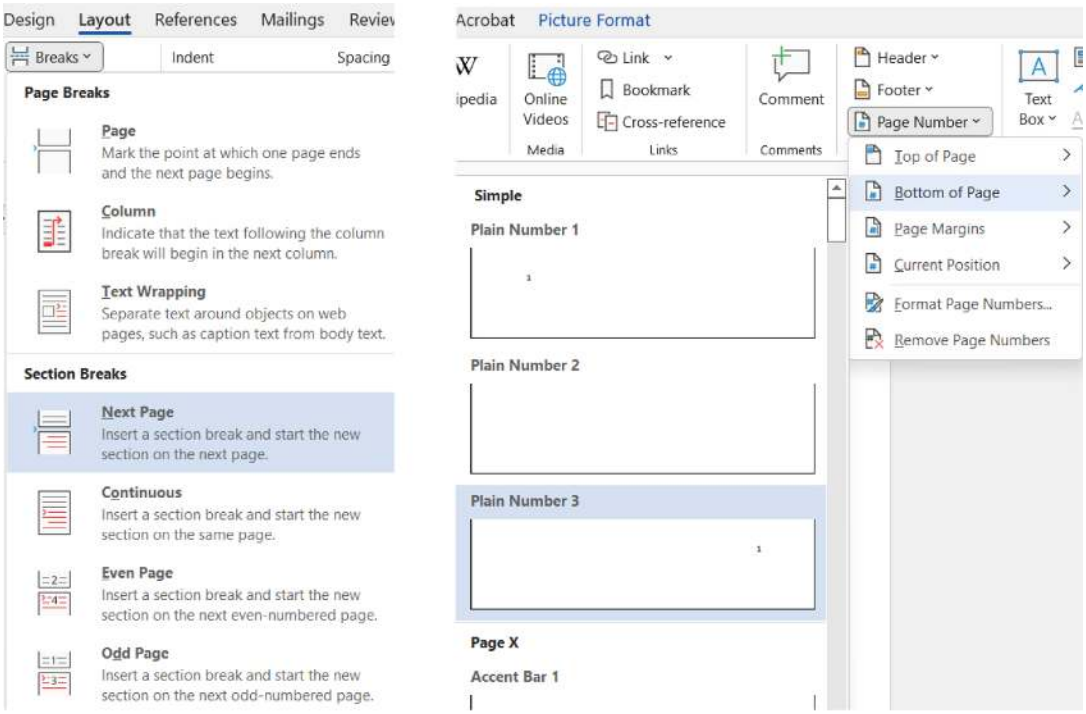


Figure 3.12: Section breaks (a) allow you to have different page formats for different areas of the document. Panel (b) shows that the number will be at the bottom of the page. (Used with permission from Microsoft)

Another advantage to having different sections in a document is that you can accommodate different graphics well. This can be helpful when working with graphics that are best suited for landscape orientation, for example. As with the page numbering, you can change the orientation for a specific section. Figure 3.13 shows successive pages of a document with different orientations.

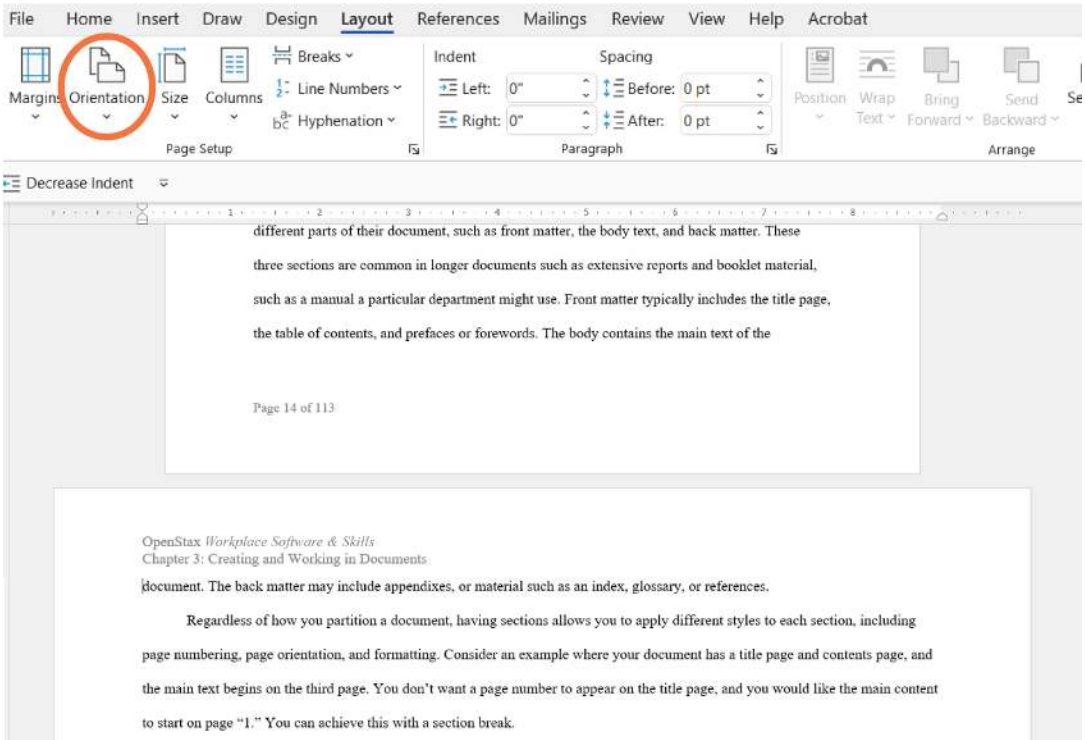


Figure 3.13: Inserting sections in your document allows you to change the page orientation between sections. (Used with permission from Microsoft)

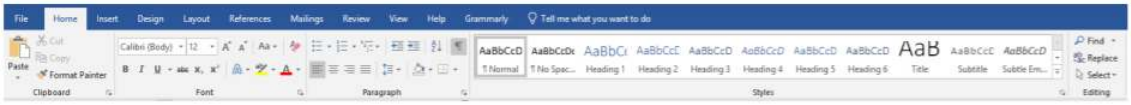
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1.1.4: Exploring the Home and View Tab of Microsoft Word

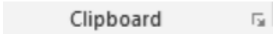
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The Home Tab contains the most commonly used document controls; actions in the Home Tab can change the font and size of the text, paragraph, and line spacing, copy and paste, change the organizational structure of the document.

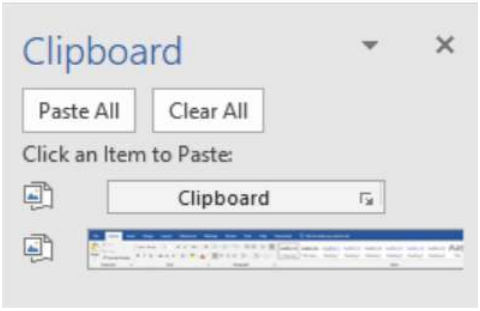


The Home Tab is grouped into four distinct areas: Clipboard, Font, Paragraph, and Styles.

Clipboard

The main function of Clipboard is the Cut, Copy, and Paste feature. All Office Applications share a Universal Clipboard. This means that items that are copied in Windows 10 can be shared between Office Applications. You can view the Universal Clipboard by clicking on the clipboard box with an arrow facing down and to the right 

in Word. A new navigation pane will open on the left side of the screen. It will display all the items that you have cut or copied in Windows 10 recently. This allows you to work with multiple items you have pasted



In addition to the Clipboard Navigation pane, users can also utilize Format Painter 

. Format Painter allows the user to copy the text size, fonts, and any other formatting, to another selected body of the text. To use the format painter functionality, users should select the text they would like to copy, and then click on “Format Painter”. Then select the text they wish to change. Users may also doubleclick on “Format Painter” and change as many text selections as they would like. When they have completed changing the text selections, they can click on “Format Painter” to stop. While Format Painter is a useful tool to change selected text, the Font groupings of the Home Tab have many more features.

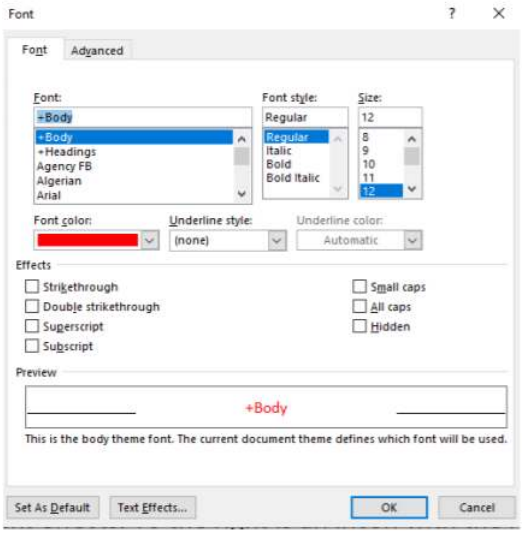
Font Group

The Font group provides unlimited customization of text. It allows users to change the font or style of the text, the size of the text, provide text emphasis, and even change the colors.



Beginning in the upper left-hand corner, the Font Selection Box and Text Size boxes allow customizations of hundreds of font designs and text sizes. The capital “A” button on the right  allows the user to gradually increase the text size with the smaller capital “A” button next to it on the right  decreases the text size. The capital “Aa” button  to the right changes the case of

the text. Using this feature, selected text can be made into lower case, UPPER CASE, Capitalize Each Word, tOGGLE eACH cASE, and regular Sentence case. Finally, in the button to the right that appears to have an "A" with an eraser removes all the formatting's from the Font menu. The lower row of the Font group contains **Bold**, *Italics*, and Underline (without underline options for line thickness). Next to these commonly used emphasis tools are strikethrough (which places a line in the text), subscript (which types small letters under the text), and superscript (which types small letters above the text).Next to subscript and superscript is an outlined letter "A" which allows the adjustments of text effects and typography to create shadows for other text effects. To the right is an icon with the letter's "ab" with a pen . This is the highlighter option which allows the student to choose between multiple colors to highlight the selected text. Finally, to the right of the highlighter menu is an icon of the letter "A" with a line underneath . This control allows the user to change the color of any selected text with an almost infinite number of color options. By clicking on the arrow pointing down and to the right in the Font group, an expanded menu with even more options will launch, allowing the user with many more text customization options, as well as the option to set default text options and effects.



Paragraph Group

The Paragraph Group focuses on arranging text in a paragraph. Users may create lists, adjust the indentation, sort items, show paragraph formatting, correctly, align text in a paragraph, adjust line spacing, add fill color in shapes, and create borders.



Bullet Lists

Starting in the upper left corner are bullet lists . Bullet lists should be used when creating a list of similar items that do not require any order. Clicking on the drop-down arrow allows for customization of the appearance of bullet lists. Pressing "Tab" on the keyboard will indent a list item and create a sub bulleted item.

Numbered Lists

To the right of Bullet, Lists are numbered lists . Numbered lists are like bullet lists, but they should be used when listing out a sequence of events that must be followed in order. Clicking on the drop-down arrow will allow for customization of the numbered list. Pressing "Tab" on the keyboard will indent a list item and create a sub numeral.

Multi-Level Lists

To the left of Numbered Lists are Multi-Level Lists  . Multi-Level Lists provide more customization of lists and sub-lists to the user.

Increase/Decrease

Indent Next on the right, the increase/decrease indent icons  allow the user to move the selected text to the right or left five spaces, or to the next tab setting. Increase/Decrease indent also changes the hierarchy of the list. Increasing an indent to the right will make an item a sub-bullet or sub-number of the item above it and decreasing indent to the left will do the opposite.

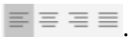
Sort

After an increase/decrease indent is the Sort icon  allows the user to arrange a current selection of text in alphabetical or numerical order. It is usually used when working with tables in Microsoft Word.

Show/Hide Paragraph Formatting

Finally, in the top right corner of the paragraph group is the Show/Hide Paragraph Formatting icon  allows the user to view all the hidden formatting options that are currently attributed to the document. This is useful if the formatting seems incorrect in a document and the user is trying to investigate it. Any formatting displayed is not printed.

Paragraph Alignment

The bottom row of the paragraph group begins with Paragraph Alignment settings  . The settings align the selected text to the left side of the screen (which is standard formatting), centered (which is common for titles), right-aligned, and justified, which distributes text evenly between the margins. Most word documents are written with left alignment, so that is the default settings.

Line & Paragraph Spacing

To the right of the paragraph alignment icons is Line & Paragraph Spacing  . These settings allow the user to choose how much space exists between lines and between paragraphs. This is helpful to enhance the readability of paragraphs by creating enough space between sentences and paragraphs. For more customization, users can click on “Line Spacing Options” in the drop-down menu for even greater controls.

Shading

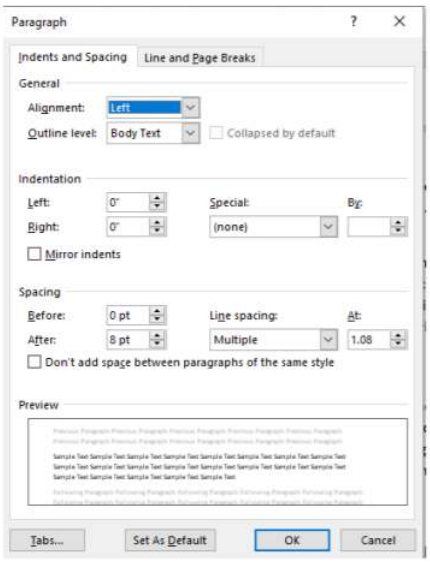
The Shading function  to the right of Line & Paragraph Spacing allows the user to change the color behind a paragraph, table, or selected text. It can be used in flyers and more creative word documents.

Borders

The Page Borders icon  allows the user to create borders around selected text and/or paragraphs and define the type of borders from the drop-down menu. There is every type of border imaginable for the user. Borders are usually created to create distance or space between separate ideas or paragraphs.

More settings

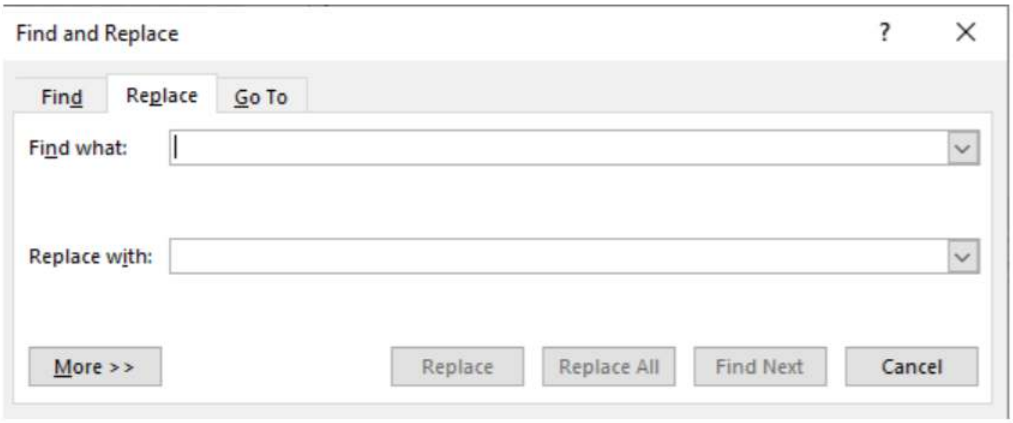
Users who desire more control in paragraph formatting can click on the arrow icon facing down and to the right.  . This will launch a more settings menu that will provide customization of the line & paragraph spacing and page breaks.



Styles Group and Editing Tab

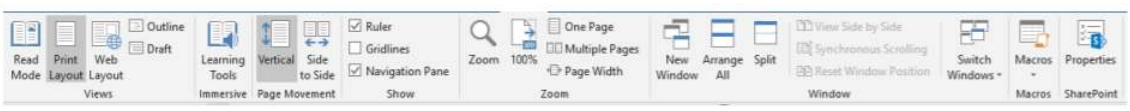


The Find/Replace/Selection Pane allows you to search for any text in Microsoft Word and replace the text with another text entry. Clicking on the “Find”  menu will display a side navigation bar allowing the user to find any word or phrase in the document. Clicking on the Replace icon  will launch a Find and Replace Dialogue box which will allow the user to replace specific text with different text. For example, I wrote a five-page paper on arc-welding, and discovered that arc-welding should be changed to the word “robotic arc welding”, I could use find and replace to automatically replace every phrase “arc welding” with “robotic arc welding”.



Finally, the Select icon  allows the user with more options in selecting text and or objects in the document.

View Tab



Microsoft Word provides a variety of options to view their document for the user to customize their workspace. *Read Mode* allows the document to be viewed without any editing tools available in Fullscreen mode. *Print Layout* simulates what the document would look like if the document were printed. It is the default view mode in Microsoft Word. Web Layout simulates the view of the document if it were on a web. *Outline* mode is for a way to quickly insert ideas on the page, while *Draft* allows the user to just see the text in the document.

Learning Tools allows the document viewer to customize the way the document is presented and read to them. It allows the user how text and pictures are displayed. Users can also determine whether to display the *Ruler* on the top and left sides of the workspace, *gridlines* on the document to make it appear like graph paper, and the *navigation pane* on the left-hand side of the document. The user can also Zoom in or out, and have the document automatically be adjusted to the display size of one page or multiple pages. Users can even open a new window of the document to work in two different places at the same time, or split the document at the insertion point to work in multiple sections at the same time in the document. Finally, Word users can click on the *Switch Windows* icon on the screen to switch between open word documents, and *Record Macros*, which allow the user to create their shortcuts by recording actions on the screen and creating a shortcut to perform everything they previously did. When they need to replicate that task, they can enter shortcut and the Macro would be initiated. Macros are for advanced users and not covered in detail in this text.

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1.1.5: Formatting Document Content in Microsoft Word

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Learning Objectives

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

- Format font types, sizes, and styles
- Modify paragraph styles in a document
- Use headings for reader and internal organization
- Adjust settings for how text and graphics flow together

You want your WorldCorp market trends report to look professional. To achieve this, you need to consider how the content should be formatted for its intended audience. Formatting applied to content includes line spacing, font type and size, alignment, and the use of organizational features like headers. Many employees in the organization, including those in upper management, will view the report, so you need the report to show your professionalism and skills in your role in the marketing department.

Formatting Font

There are many ways to change your text formatting in Microsoft Word. The most basic ways of adjusting your text are through the font, font size, and font style (bold, italic, or underlined).

The default Word font is currently Calibri. (Formerly, it was Times New Roman, and could change again.) Fonts are described as either serif or sans serif (Figure 3.14). A serif font is one that has short lines on the ends of the parts of each letter, whereas a sans serif ("without" serif) font doesn't have those embellishments on the characters. Serif fonts are usually considered easier to read when there is a large amount of text being presented, and sans serif fonts are often considered to have a more contemporary look. For accessibility, simple fonts such as Arial are a better choice to accommodate all readers. Fonts that are curvy or more artistic in nature are difficult to read and decipher, particularly for people with vision-related impairment. However, curvy and artistic fonts may be used to attract attention and add flair to promotional materials, such as brochures.

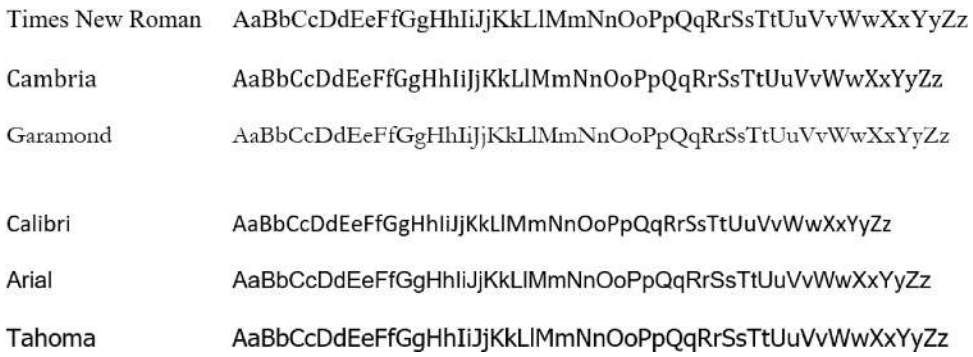


Figure 3.14: The top three fonts are common serif fonts, while the three on the bottom are sans serif. Note the differences in the lines on the ends of the letter strokes. (Used with permission from Microsoft)

You can select fonts using the drop-down menu within the Font options on the Home tab. There are many fonts in Word, most of which are not appropriate for business reports because they are too ornate or decorative. You should think carefully about the type of font you want to use and what it will convey to its readers. You want to stay professional and avoid "fun" fonts like Comic Sans and Papyrus. Font choice also affects the readability of your document. Script-like or blocky fonts can be difficult to read, especially with long documents. Additionally, some fonts are more appropriate for headings or logos instead of the body of a report or document.

Mac Tip

Mac offers some fonts that are not included in the Microsoft OS version, and, by default, is missing some that can be added by downloading and loading the fonts into the application.

To adjust the font size, go to the Font Size drop-down menu, directly to the right of the Font menu on the Home tab. There are other ways to adjust the font in a selection in a document, but this is the most direct way to make the changes. The default font size is 12-point, but you may want to make your font larger or smaller. Most documents use fonts in sizes 10- to 12-point. For your market trends report, you will probably want an 11- or 12-point font for your main body text, and a larger size for your report title and section headings. You should ensure your font size is easily readable, especially if you plan to provide printed copies of your document.

You can apply additional styles to your font, such as bold, italic, or underline, using tools in the Font command group (Figure 3.15). There are also options for special text applications, such as adding superscripted text (text that is raised above the line) and subscripted text (text that appears below the line), and changing font color. Additionally, you can easily change the capitalization style through the Aa drop-down menu. This allows you to set a selection of text in all capitals, all lowercase, or to capitalize each word, such as is common in headers or titles.

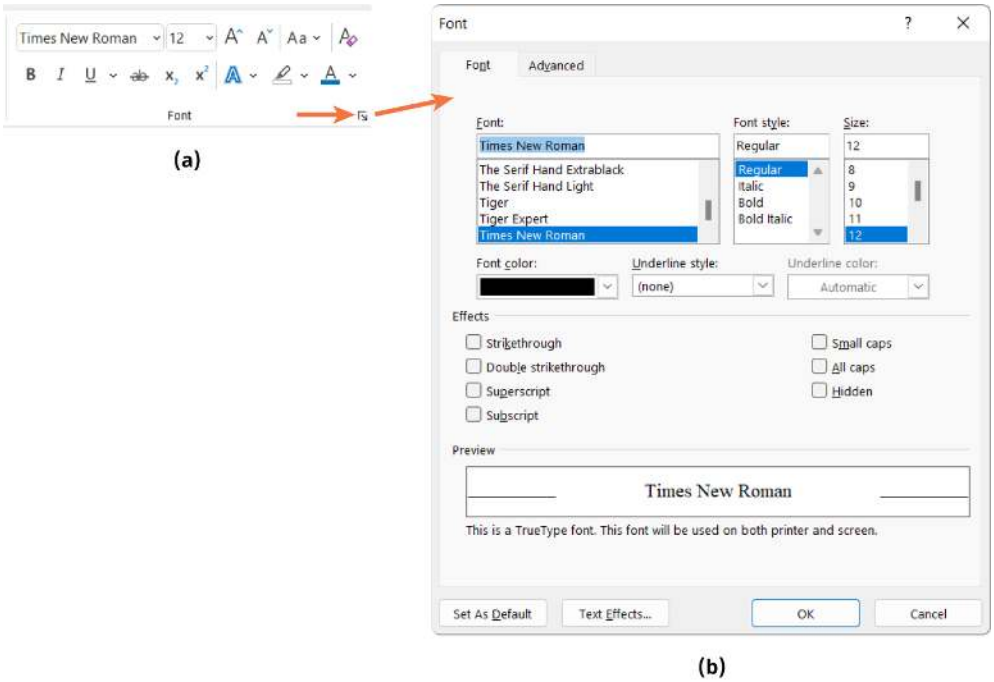


Figure 3.15: (a) The Font command group lets you select your font and font size, apply special treatment like bold or italic, and set case. Selecting the arrow (a) opens the dialog box (b) where you can apply multiple formats at once. (Used with permission from Microsoft)

Formatting Paragraphs

Paragraph formatting entails customizing the way the text appears on the page and how it flows from one paragraph to the next. Specifically, this includes line spacing, tab indentations, and alignment justification of text.

As you learned in Formatting Document Layout in Microsoft Word, line spacing determines how much space there is between the lines of text within a document. There are different advantages to single-spacing versus double-spacing. Most business documents, such as emails and printed letters, use single-spacing. This means that each line of text comes right after the other, with very little space between them. However, double-spacing may be used in working documents, and can be useful when there are multiple collaborators and you are using Track Changes. This allows for better visibility for the changes or edits, and makes it easier to see the revisions in progress. Double-spacing means that there is a complete line of space between lines. In addition to single-and double-spacing, users can use 1.5-spacing, or set custom spacing between lines within a paragraph (Figure 3.16).

You can also specify spacing *between* paragraphs, which is different from the line spacing *within* a paragraph. For example, you might want your paragraphs single-spaced, but want a visual break between paragraphs.

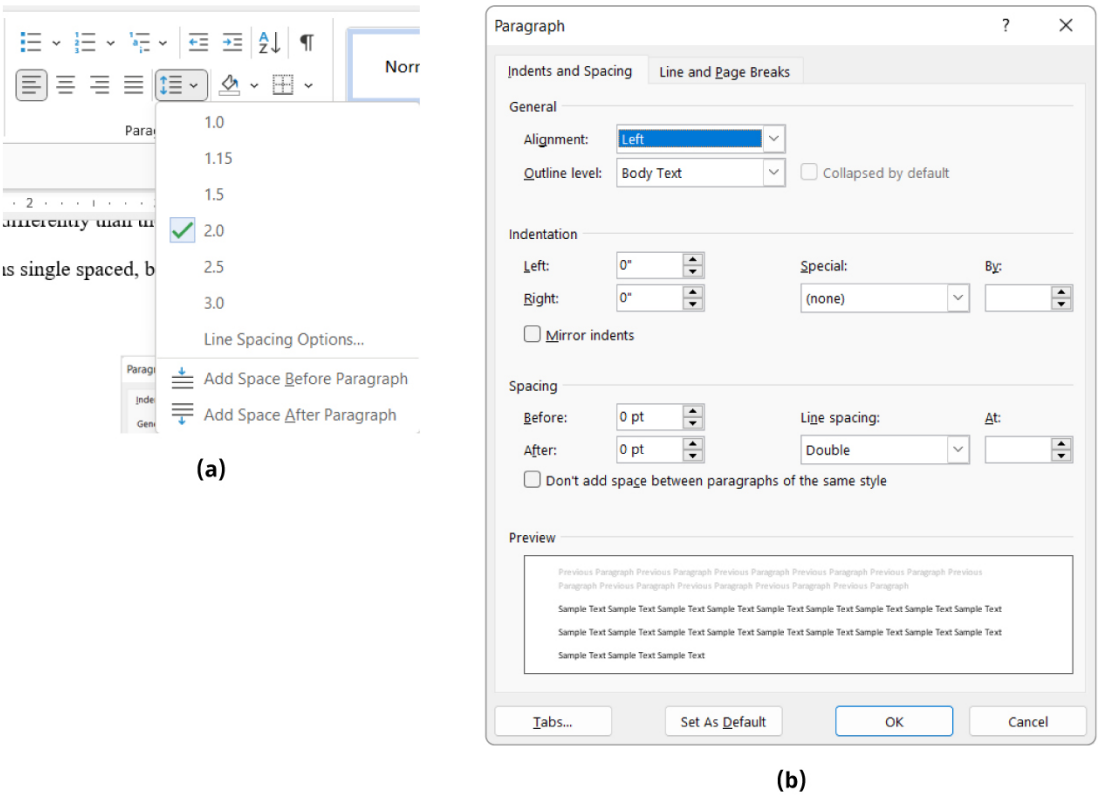


Figure 3.16: The Paragraph command group offers a variety of line spacing options in (a) a drop-down menu or (b) in more detail in a dialog box. (Used with permission from Microsoft)

Paragraph separation is typically indicated in one of two ways: by indenting the first line of the paragraph with a tab indentation as Figure 3.17a shows, or by adding a space between paragraphs, as you can see in Figure 3.17b. In the latter case, the paragraph is usually not indented, as the space serves the same purpose as the indentation (i.e., to indicate a new paragraph). Most documents, including those used in business, have small 0.5" indentations at the start of each new paragraph as the default setting. If indentations are too small, they are difficult to distinguish, and large indentations can look awkward and confuse readers.

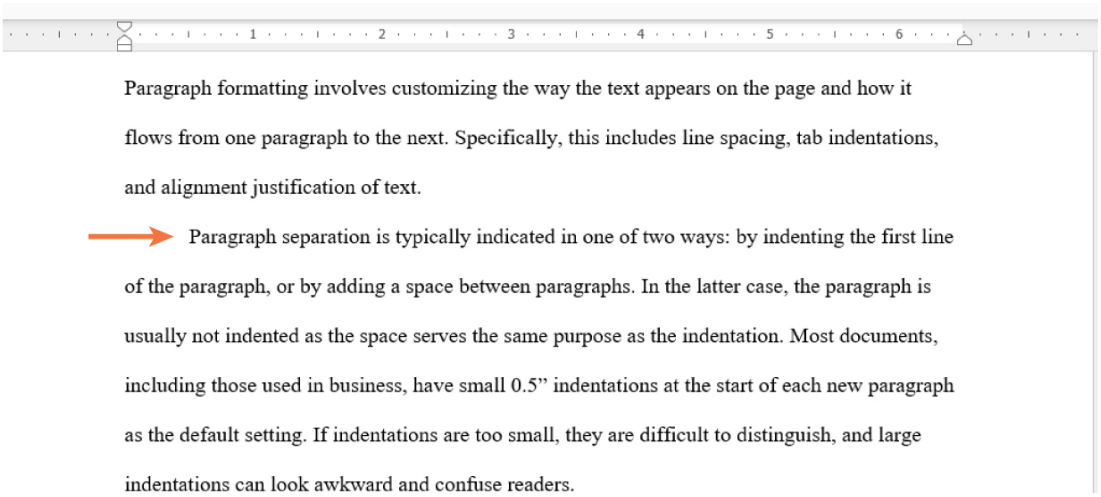


Figure 3.17: Paragraphs can be indicated by (a) a first-line indentation or (b) by spaces between paragraphs. The latter works well in documents where page count is not an issue as it could make for a longer document. (Used with permission from Microsoft)

Paragraphs can also be formatted with different alignment, or justification, styles (Figure 3.18). In documents, the most common alignments for the body of the text are left-justified or fully justified. Left-justified means that the text all lines up in a straight line along the left margin, but where text ends on the right margin varies. Fully justified text lines up in a straight line along both the left and right margins. This produces a clean and professional look and is often used in publishing or print materials. However, full justification can also lead to awkward gaps within lines of text if the material contains a lot of long words or specialized content. Determining which alignment is appropriate for a document depends on the audience. For example, if you submit your WorldCorp market trends report for publication in an industry journal, it should be fully justified.

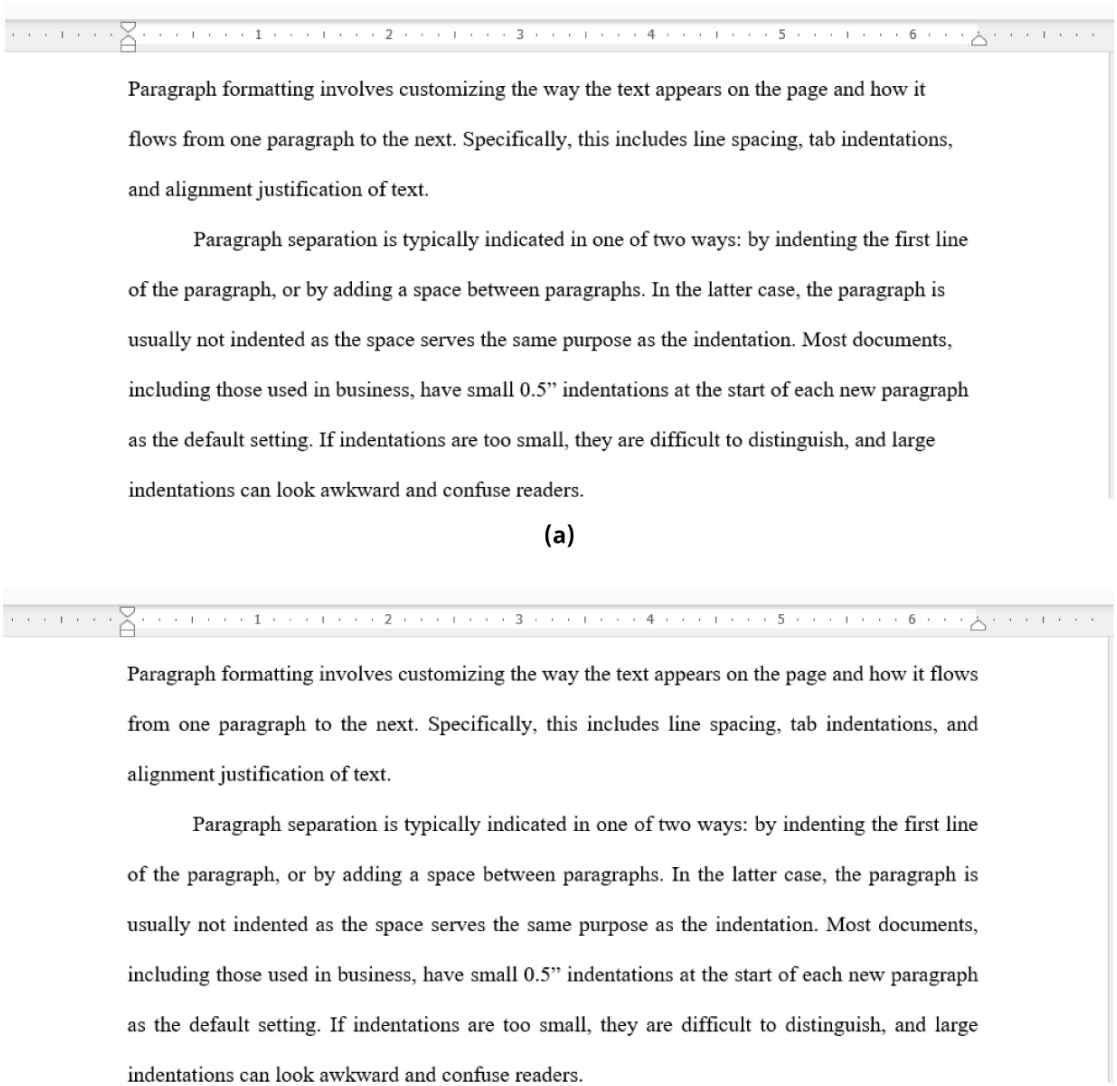


Figure 3.18: Most documents set the main text with either (a) left alignment or (b) full justification. (Used with permission from Microsoft)

Other alignment options include centering text and right alignment. Centering is often used to give special treatment to a particular element of content. Right justification is often used in financial data, where, for example, numbers align best if they align on the right.

Headings

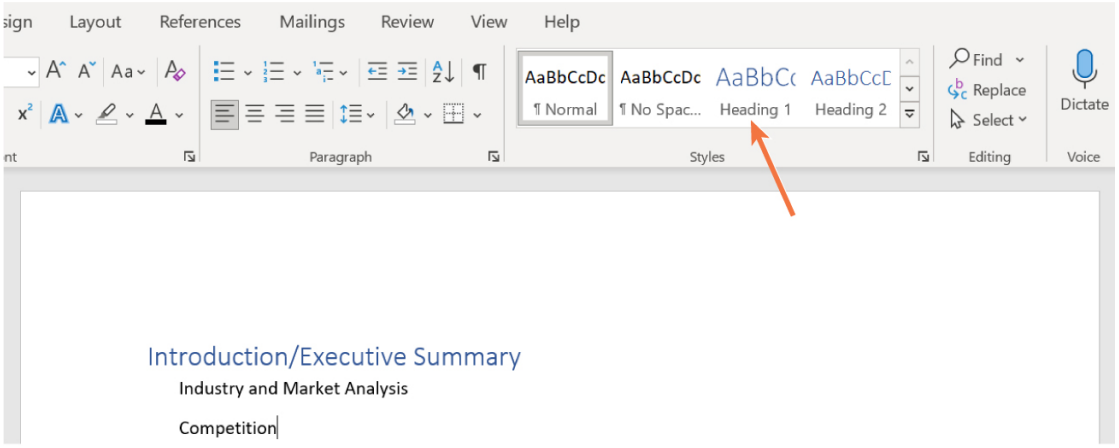
A heading helps readers understand the organization of a document by breaking it into meaningful chunks. Different heading levels can be used to create a hierarchy of content that also helps users best understand the material. In Word, headings can be set using styles that give them additional functionality, such as quickly displaying an outline of your document and providing the ability to link to or between sections. You can also generate a table of contents using headings.

As an example, let's select three section titles from your market trends report. Let's say that the major sections of your report are as follows:

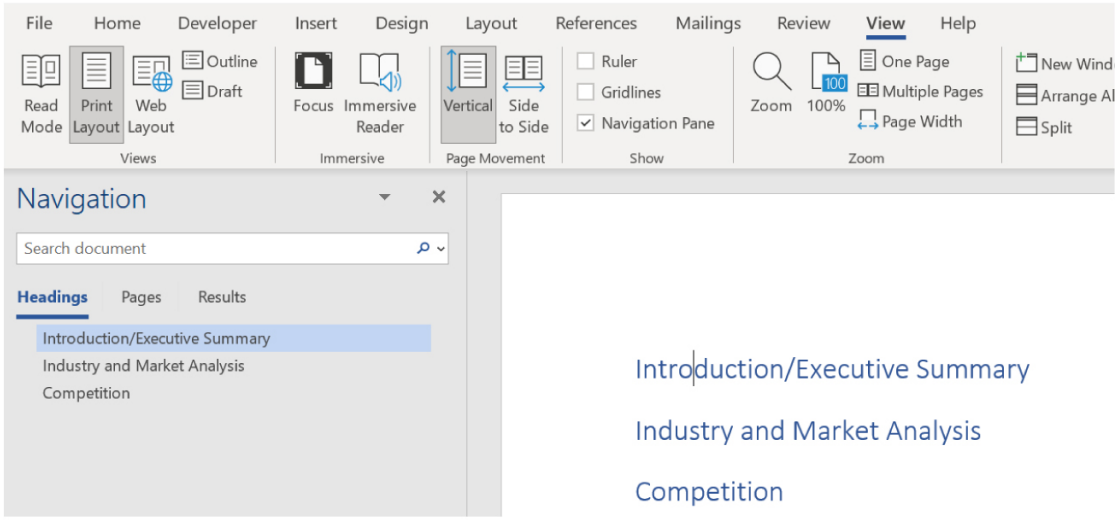
- Introduction/Executive Summary
- Industry and Market Analysis
- Competition
- SWOT (strength, weaknesses, opportunities, threats)

- Recommendations/Key Findings
- Summary

Open a blank Word document and type in the first three headings from the list above. For each header, select the text, go to the Styles command group, and select Heading 1 (H1). H1 represents the top-level heading, which you might want to use for a title or a high-level section title. As you can see, the font size and the color changes automatically because you are selecting from the preset heading styles in Word. Repeat this formatting for your next two headings. If you open the Navigation pane, you will now see that your three H1 headings appear in outline format (Figure 3.19).



(a)



(b)

Figure 3.19: (a) Headings serve as organizational signposts for a reader, collecting passages into sections and providing a hierarchy. (b) Headings can also help you navigate documents. (Used with permission from Microsoft)

Heading hierarchies use the design of the heading to indicate levels of sections. The heading levels are usually referred to by numbers (such as Heading 1) and sometimes the shorthand H1, H2, H3 is used. Word's default heading styles are designed to have a logical and intuitive hierarchy, which typically includes font size, and sometimes font style. In general, color should not be used to indicate levels in a hierarchy since this is neither logical (i.e., it is not clear why one color would be higher or lower than another) nor accessible (some colors are not readily conveyed to users who may be visually impaired or have other accessibility needs).

Adjusting Graphic and Text Layouts

If you are using graphics in your document, you will need to determine how the graphics and text should interact in the layout. When you insert a figure into a text document, the figure can be positioned in several ways in relation to the text using the text

wrapping menu, as Figure 3.20 shows. Text wrapping refers to how the text is placed around an image or figure you place in the document. Text wrapping is accessed through the Layout tab in the Arrange command group. Your wrapping style may depend on the size of the graphic, as well as its purpose. If it is an important figure being discussed in the text and/or if it has a caption, you may want to clearly separate it from the text with the "Top and bottom" option, allowing the text to flow above and below the image, but not to either side of it. If the image functions more as a design element, such as a logo or photo to add interest, you might have the text wrap around it.

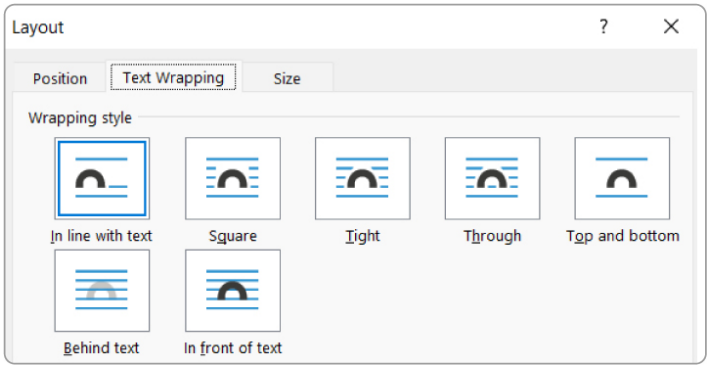


Figure 3.20: The wrapping style of how an image and text interact should be based on the purpose of the image. (Used with permission from Microsoft)

For example, let's assume you want to add an image of one of WorldCorp's products to the market trends report. As you may recall, WorldCorp sells products such as computer accessories, laptops, and TVs. When discussing trends in the laptop industry, you may want to include a picture of a laptop from a top-selling brand in the industry, such as HP. To insert the image into the report, place your cursor in the area of the report where you want the image. Then, copy and paste the image into the market trends report. Then, from the Layout tab, select the Wrap Text tool and select the appropriate text wrapping style to present a professional look for the inserted picture. The Wrap Text tool can also be accessed by right-clicking on the inserted image or figure, as shown in Figure 3.21.

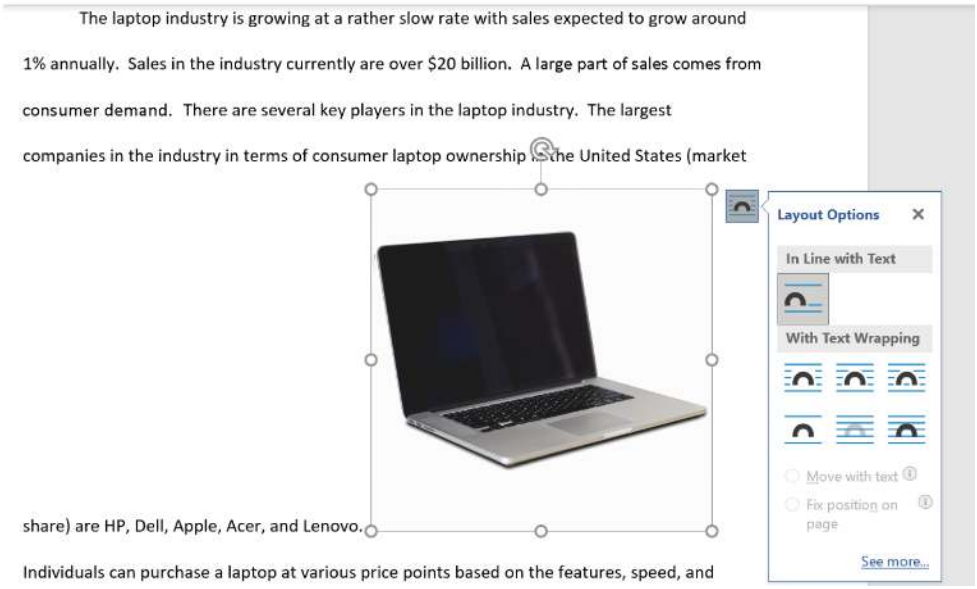


Figure 3.21: The default when inserting a picture is to have the picture inserted where the cursor is located "In line with text." (Used with permission from Microsoft)

Notice that you can change the wrapping style using the tool that appears in the upper-right corner of the image when you paste it in the document (Figure 3.22).

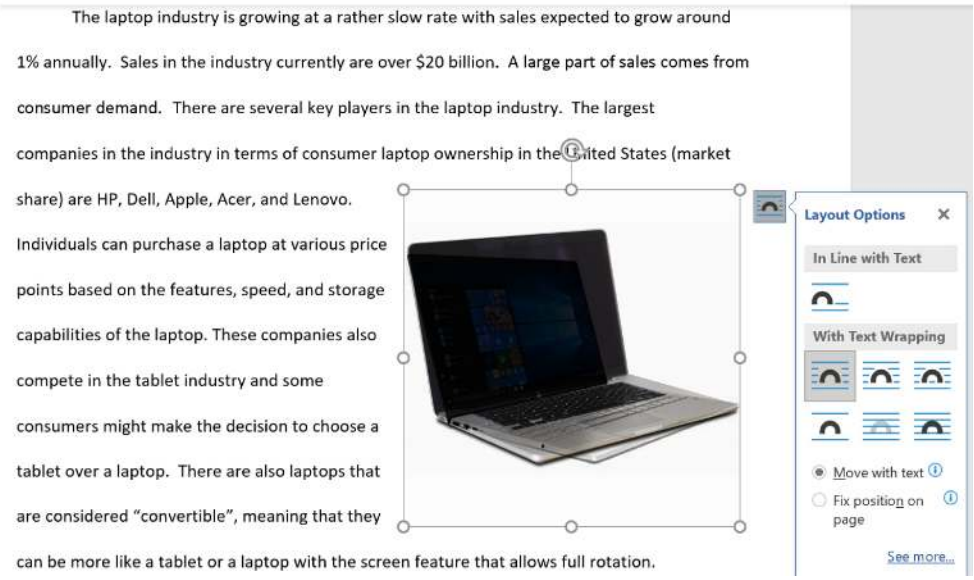


Figure 3.22: You can choose to have the picture inserted with text wrapping blocked around the picture using "Square." (Inserting the picture "In front of text" does not present a professional appearance as it hides some of the text.) (Used with permission from Microsoft)

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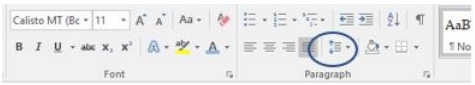
1.1.6: All About the Text

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Entering and Editing the Text

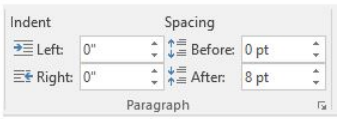
Microsoft Word is a word processor software application used to create, modify, and share documents. When Word is started, the user has the option of modifying a pre-developed template or creating a blank document. Users begin by entering data at the existing insertion point identified by the I-beam pointer (cursor). As the user types text into the document, Word will **word-wrap** the data when encountering the right margin, and continue the text on the following line. The user only needs to press [Enter] when it is desired to start a new paragraph or insert a blank line.

Line spacing is the space between each line in a paragraph. By default, the **line spacing** within a paragraph in Word is 1.15 lines, and the end of a paragraph is followed by a blank line. While the default spacing may be appropriate for some documents, other situations might require different settings. For example, this paragraph is using 1.5 line spacing, which can be adjusted by clicking the option encircled below in the Paragraph group from the Home tab. Other popular line spacing options include double and triple-spacing.



Line Spacing

Line spacing is a popular option to adjust for various documents. However, p**aragraph spacing** is less well-known.



Paragraph spacing

Adjusting the spacing before and after paragraphs creates necessary white space to the document more readable. Go to **Page Layout** and under **Spacing**, click the up or down arrows to adjust the distance before or after the paragraph. Spacing is measured in points. You can also type a number directly. This document is currently using 8pt of paragraph spacing After each paragraph.

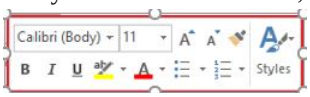
While entering text, users encounter many automatic features as they type, which include:

Feature	How to Use
AutoComplete	A ScreenTip appears you type. Pressing [Enter] inserts the suggested text. Continue typing to reject the suggestion.
AutoCorrect	Commonly misspelled words and capitalization mistakes are fixed based from Word's dictionary.
Word Count	Continually recalculates the total count in the Status bar.
Spelling and Grammar	Right-click red- or green-underlined text to reveal a shortcut menu of correction options. Click an option to accept and fix the text.

Auto Type features

Defining Font and Text Attributes

The way text appears on the screen or a page is referred to its format. Formatting text can enhance the appearance of a document, create visual impact, and help illustrate a document's structure. Font, size, and style define a character's format. A **font** is a complete set of characters with the same typeface or design. Dozens of fonts are available in the Font drop down list. Users can easily format text with fonts, colors, styles, and other formats by selecting the text and clicking various commands in the Font or



Paragraph group on the Home tab. The Mini toolbar, appears faintly above text when you first select

it, and includes the most commonly used formatting commands. The table below describes the functions of each button on the mini toolbar.

Button	How to Use
Calibri (Body)	Change the font of the selected text. The default font is Calibri.
11	Change the font size of selected text. Size is measured in points.
A^	Increase the size of selected text.
A˅	Decrease the size of selected text.
	Format Painter. Copies the formatting of selected text to apply to other text.
	Apply a style to selected text.
B	Apply bold to selected text.
I	Apply italics to selected text.
U	Underline selected text.
	Apply colored highlighting to selected text.
A	Change the color of selected text.
	Format the selected paragraphs as a bulleted list.
	Format the selected paragraphs as a numbered list.
Other Formatting Options from the Font Group not found on the Mini Toolbar	
abc	Applies a strikethrough line to the selected text. Tells the reader to omit the text.
x_2	Converts the selected text into subscript font, which lowers the position and reduces the size of the text.
x^2	Converts the selected text into superscript font, which raises the position and reduces the size of the text.
	Text Effects and Topography tool changes the look of text by changing its fill, its outline, or adding effects, such as shadows, reflections, or glows.
	Clears the formatting of the selected text.

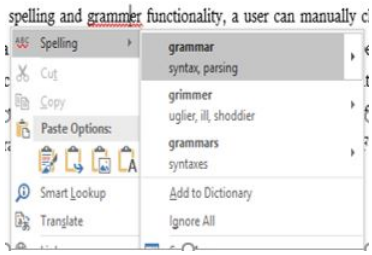
Many of these commands have keyboard equivalents to improve productivity!

Formatting buttons

Here are a couple of best practices when utilizing fonts. First, avoid using too many fonts in the same document. More than two or three fonts in the same document becomes distracting. Secondly, legibility and readability should be primary considerations. This should factor in the reader's characteristics, and the purpose of the document. For example, while the default size for a font is 11pt, a larger size font (i.e. 14pt) might be more appropriate for an older aged reader. A pt (or **point**) is the equal to 1/72 of an inch. Headings and titles deserve larger font sizes. However, it is also good practice to limit the quantity of font sizes used in a single document. Lastly, consider using common fonts for professional and business documents. Calibri, Arial, Verdana and Times New Roman are ranked highly by Monster.com as preferable fonts for résumés, whereas Comic Sans is not recommended. Note that Calibri is only available on Windows operating systems, whereas Arial, Verdana and Times New Roman are some of the cross-platform available fonts.

Spelling and Grammar

In addition to the automatic **spelling and grammar** functionality, a user can manually check their document, and utilize extra functionality. To manually check the document for spelling and grammatical errors, the user can use the commands found under the Review tab.



Spelling & Grammar

The keyboard shortcut to invoke this command is the **[F7]** key. In addition to the Spelling & Grammar check, the user can also utilize the **Thesaurus** and **Word Count** features to improve readability and accuracy. The thesaurus offers a collection of synonyms that can replace words that are used too often. It is a great tool for solving crossword puzzles! The Word Count is also automatically updated on the status bar.



Status bar

Selecting Text

Aside from entering text, selecting text is probably the most common task for most Word users. Almost every task begins by selecting something. Perhaps that's why there are so many ways to select text? The following list is not comprehensive.

Feature	How to Use
[Ctrl] + A	Selects all text in the document or all files in File Explorer.
Click & Drag	A very common, yet easily error-prone way, by holding down the left mouse key and dragging to select multiple characters, words, or rows of text.
[Shift] + Arrow	Position the cursor, and then click the [Shift] key and use the arrows to select one character at a time.
[Shift] + [Home] or [End]	Position the cursor, and then click the [Shift] key and the [Home] key to select everything from the cursor to the left margin. Conversely, the [End] instead of the [Home] key will select everything from the cursor to the right margin.
Double-click	Selects the current word.
Triple-click	Selects the entire paragraph.
Margin + click	Selects an entire line of text.
Margin + click & drag	Selects multiple lines of text.
Margin + double-click	Selects an entire paragraph.
Margin + triple-click	Selects the entire document.
Selection + [Ctrl]+Selection	Selects two non-contiguous blocks of text. Select the first range of text, then hold down the [Ctrl] key, and select another range of text.

Selecting Text

Cut, Copy, and Paste Text



One of the most common operations for users is cut, copy, or pasting files & folders. Pasting a file inserts the new file into the new location. Selecting "Cut" to a file will remove it from its current location and paste the file to its new location. The "Copy" command creates a replica of an original file and pastes the file in the selected location. To copy a file, select the file you want to copy and click Copy under the Home tab. In addition, you can copy or move a file without leaving your current location. Under the Home tab within the Organize group, click 'Copy to' or 'Move to' button, and choose the location if it's listed, or click the Choose Location button and select the location.

Utilizing Format Painter

The **Format Painter** tool allows the user to copy a format from selected text and apply the format to other selections. For example, if you have inserted text in Word, and have it formatted using a specific font type, color, and font size, you could copy that formatting to another section of text by using the Format Painter tool. Select the text or place your cursor in the paragraph that contains your source formatting, then click the Format Painter tool from the Home tab's Clipboard group. The cursor will change to include a paintbrush, which indicates that the user can now select the destination text that should receive the source formatting. If multiple areas of text need the same formatting, the user should double-click the Format Painter tool to be able to apply the formatting to multiple selections, until the user presses the Esc key. The Format Painter tool works similarly in Excel and PowerPoint too.

Finding and Replacing Text

A document can be automatically searched for a specific character, word or phrase. Choosing the **Find** command on the Home tab will open the Navigation pane where search text can be entered. Matches will be displayed in the pane and highlighted in the document.

Similarly, the **Find and Replace** feature allows users to make mass edits to a document. For example, a user might want to substitute the words teacher with trainer throughout a long document. Using the Replace command found in the Editing group of the Home tab, a user can choose to find and review or replace each occurrence individually or replace all occurrences in one step.

The Advanced Find features are similar to the Find and Replace Search Options. To make the search more specific, Word allows users to define criteria, such as Match case or Find whole words only. These options will narrow the scope of returned results. For example, with the Match case check box selected, the text Mark will not be found if the word mark is entered as the search criteria. Conversely, the use of Wildcard characters will increase the search results. An asterisk character will allow any characters to be substituted. Therefore, check* will find checks, checked or checking.

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1.1.7: Bullets, Lists, and Hyperlinks

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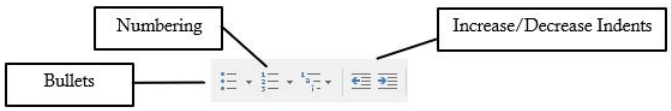
Creating Bullets and Numbered Lists

Formatting a list with bullets or numbers can help to organize the logic of a document. In a **bulleted list**, each item is a separate paragraph formatted with a hanging indent, a bullet (Ÿ), and a tab. The bullet character can be formatted to represent other symbols, such as check marks, squares or other symbols from the bullet library or custom-defined new bullets. Formatting a list with bullets adds emphasis, but not priority. Each bulleted item is considered of equal importance, such as a grocery list. Conversely, a **numbered list** shows a priority or sequence. A typical recipe helps illustrate this difference:



Bullets and Numbered Lists

The ingredients and supplies are listed using bullets, because there is no distinction in their priority. However, the instructions utilize a numbered list, because the sequence is crucial to the process.

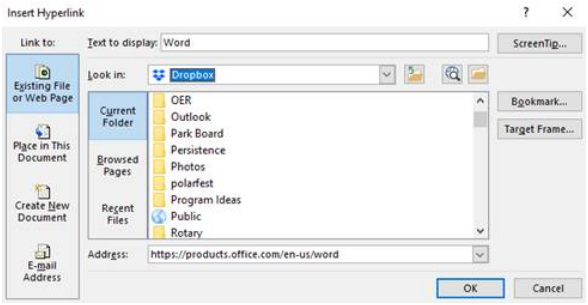


Bullets & Numbering ribbon

To create a bulleted or numbered list, first select the paragraphs of text, and the select the appropriate option from the Home tab on the ribbon. Click the Increase Indent or Decrease Indent commands from the Home tab to format the list appropriately. To remove the bullets or numbering, place your cursor in the list and re-click the Bullets or Numbering command.

Inserting and Modifying Hyperlinks

A hyperlink, often referred to simply as a link, is text or a graphic that, once clicked, “jumps” to a different location in the file or to a different software program. Software programs include e-mail applications, web pages or an external file, often created in Microsoft Office programs like Excel or PowerPoint. There are a few ways to insert a link into your document. Depending on how you want the link to appear, you can use Word’s automatic link formatting or convert the text or graphic into a link. The fastest way to create a link in a document is to press ENTER or the SPACEBAR after you type the address of an existing webpage, such as www.minnesota.edu. Word automatically converts the address into a link. The same result occurs if the user were to enter an e-mail address, such as marcus.lacher@minnesota.edu. Hyperlinks have two parts: the address (URL) of the web page and the display text. In the two previous examples, the URL matches the display text, however it is possible to create a link to any word, combination of words, or an object, such as a picture or shape.



Insert Hyperlink

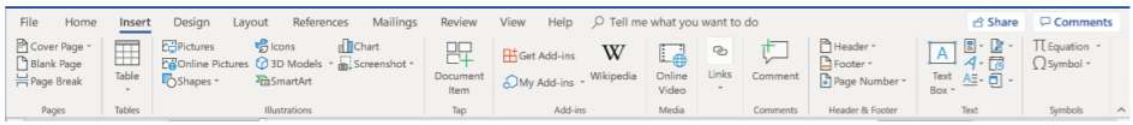
To create a link on a specific word or object to a web page, start by selecting the word(s) or object, and then click the Link button in the Links group of the Insert tab to open the Insert Hyperlink window. In the illustration below, a link is being defined to go to Microsoft's website for the Word program. The text "Word" appears as the Text to display so that once the link is created, this text will appear with the hyperlink attributes, which are typically blue and underlined. The Address field contains the URL to the specific web page destination that will open in the current device's default browser application. The Insert Hyperlink window fields will change significantly if the Link to: open on the left side is changed from Existing File or Web Page to another option. To follow a hyperlink in Word, hold the **Ctrl** key and click the linked text or object.

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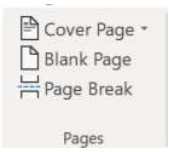
1.1.8: Introduction to the Insert Tab

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The Insert Tab allows the user to insert a variety of items into their document. In contrast to the Home Tab which provides controls for the user to manipulate and adjust their entered text, the Insert tab allows the users to add items to the document such as new pages, tables, graphics, document items, Microsoft Word add-ins, video, comments, header/footer, text boxes, and Symbols. Just like the Home Tab, all functions of the Insert Tab are placed into groups that are described below.

Pages Group

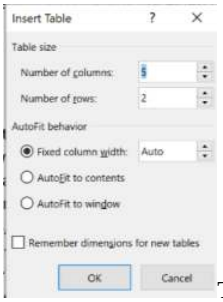


The Pages Group contains features to insert a Cover Page, Blank Page, or a Page Break to your document. Clicking on Cover Page will launch a drop-down menu allowing the user to choose from a variety of cover page templates to place as the first page or cover page of the text. After the templates are selected, the user must enter text into the appropriate fields. The Blank Page command inserts twopage breaks, one above and one below the cursor's current position. The user selects to insert a Blank Page break when they want to ensure one entire page of space between paragraphs. Finally, the Page Break command inserts a Page Break just after the insertion point. A Keyboard shortcut for a Page Break is Ctrl + Enter. The Page Break command is used to ensure the next text after the insertion point is on a new page.

Tables Group



The Tables Group has one icon with many features. Clicking on the Table icon will launch an additional commands dialog box below. Users will have the option to insert a table by selecting how many row and column cells the table contains as the first option. Cells are the individual "boxes" that make up a table. Rows are groupings of cells that move left to right. Columns are groupings of cells that move up to down. A table can allow information to be shared with the reader in an easy to understand way. As an example, see the table below for a detailed example of all the table command options available to the user.

Table Command	Function
Insert Table Command	 The Insert Table Command will allow the user to customize the number of columns and rows and determine whether they would like to size the table themselves with a fixed column with or allow Word to autofit the table to the specific text or window area. Word users may always resize the table by moving their cursor between the table cells until their insertion point cursor changes to a cursor with arrows pointing left and right. Clicking on the mouse at this point will allow the user to adjust the size of tables columns and/or rows.
Draw Table	Selecting the Draw Table command will change the cursor's image from the insertion point to a pen. When the user selects a location with the pen and clicks the mouse, they can insert a table cell.
Convert Text to Table	Users can apply this command after selecting words they wish to place into a table. With the command entered, Word will attempt to place the text into the cells which it thinks is correct. It may still require the user to manipulate the table.
Excel Spreadsheet	Selecting an Excel Spreadsheet will allow the user to place a mini excel worksheet in their document at the insertion point. The excel document not only can appear as a table but can also be used to perform several calculations.
Quick Tables	Selecting Quick Tables will launch a variety of table templates from Microsoft Word, allowing the user to select from already created tables that have been formatted and choose the best one for their project.

After the Table has been created it is easy to add additional rows/columns, resize the table, or add additional features and formatting. By using the primary mouse button (usually left-clicking) inside the table will add two additional modules to the Word Ribbon: Design & Layout. 

. In addition, using the secondary mouse button (usually right-clicking) brings up other shortcuts for the table that are found in the Design and Layout Tab.

Design Tab



The Design Tab allows for manipulation of the appearance of the Table. In the Design, Tab is Table Style Options, Table Styles, and Borders Groups.

Table Style Options

Table Style Options allow the user to allow to Program Word to understand the type of table that was created. Selecting Header Row will change the formatting of the top row to differentiate the shading and the font of the header row. Total Row will change the formatting and shading of the bottom row. This is usually selected if the table is displaying a total (such as the total cost of supplies in a table about supply costs. Banded Rows are always selected by default. Banded Rows indicates that every that the shading in every row will be alternated to provide better visual clarity of the table. First Column indicates that the First Column on the left of being shaded differently to provide visual separation from the table information. This can also be selected for the last column. Finally, Banded Columns are the exact same as Banded Rows, except that they apply to columns. Depending on the table created and the information in the table, there are many options to make the information in the table stand out to the reader.

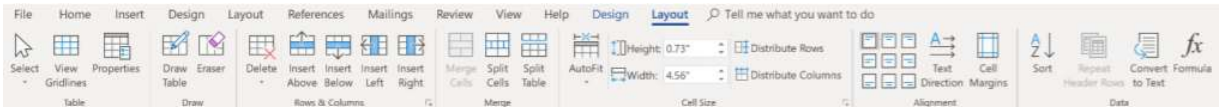
Table Styles

The Table Styles Group has two main options: to change the appearance and shading of the table and to manipulate the color options. Selecting the downward-facing arrow will launch a dialog box to provide the user with additional Table Styles with variations on color, spacing, and line thickness. Users can even create their own Table Style or edit a Table Style template. Finally, selecting the shading paint can button  will allow the user to change the color of the cell.

Table Borders

Table Borders allows the user to adjust the line thickness, color, and pattern of the table borders. Clicking on the downward arrows will provide even more options about Border styles, font size (default is ½ pt.) and Pen color. In addition, users can add or remove cell lines by selecting the Borders icon  Finally, the Border Painter icon  will change the cursor to a paintbrush. Word users may add page borders by directing the cursor to the border of a table to add a line or increase the darkness of the line.

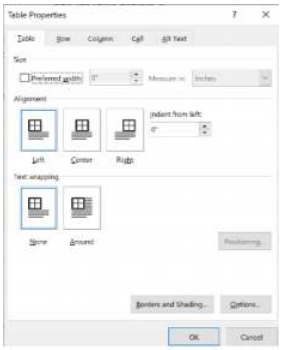
Layout Tab



In contrast to the design tab, the layout tab allows for manipulation of the table itself. The Layout Tab consists of the Table Group, the Draw Group, the Rows & Columns group, the Merge Group, Cell Size, Alignment, and Data Groups.

Table Group

The Select button relates to the specific location of the insertion point in a specific cell in a table. Clicking on the Select icon will display Select Cell, Select Row, Select Column, and Select Table. Select Cells will highlight the specific cell. Select Row will highlight the entire row with the insertion point contained in it. Select Column will select the entire column. Finally, a select table will highlight the entire table. View Gridlines shows are hiding the gridlines of a table. By default, the gridlines are displayed in a table. Sometimes, the user wishes to not display these lines for cosmetic reasons. Finally, Table Properties allow for the manipulation of table formatting, row and column information, and allows the user to enter Alt Text, which allows users with screen readers to view information about the content in the table. Users can also adjust borders and shading and text wrapping in the table, along with preferred width of cells.



Draw Group

The Draw Table group has two options, Draw Table and Eraser. Draw Table allows the user to use the mouse to draw custom table boundaries, including diagonal lines. The Eraser icon allows the user to remove table boundaries and lines to merge cells in order to customize a table.

Rows & Columns Group

The Rows & Columns Group allows the user to insert cell rows or columns above, below, left, or right of the insertion point. Often when designing a table, new information requires a new row or column. Users can also do this by right-clicking on the table, but this can be a solution with more options.

Merge Group

The merge group consists of Merge Cells, Split Cells, and Split Table. If a user highlights information in two adjacent cells, it will merge the information together in one cell that takes up the same area of space. Split Cells does the opposite, it separates one cell into multiple cells. Finally, Split Table allows a new table to be created beginning at the row that is currently the insertion point.

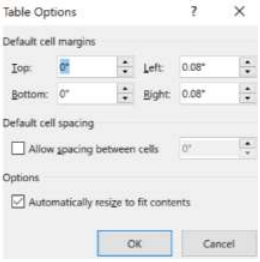
Cell Size

Cell Size determines the length and width of each cell in a table. The first option is the Autofit command. Autofit allows the user to resize the entire table. It provides three options, Autofit Content, Autofit Window, and Fixed Column Width. Autofit Content allows Microsoft Word to automatically size the table to take up as little space on the page as possible. Autofit Window resizes the table based upon the size of the window. Finally, Fixed Column Width allows the user to manually resize the table with the measurements to the right. Distribute Rows & Columns allow for an equal distribution of rows/columns in the table.

Table Alignment



Table Alignment allows the user to orientate the text within each table cell top left centered, centered, top right centered, middle left alignment, middle center, middle right alignment, lower left alignment, lower-middle centered, and lower middle right alignment. The text direction allows the user to change the direction text is displayed. Text can be displayed by default as left to right, but it can also be up to down, right to left, and up to down.



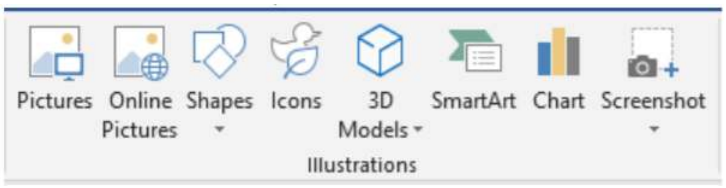
Finally, Cell Margins allows the user to set up margins between cells, and left, right, upper, or lower indentation for text.

Table Data



Table Data allows the user to use some features of Excel in a Microsoft Word table. Information can be sorted. If a table occupies more than one page, selecting Repeat Header Row will display the table header on the next page so the viewer can see the headings. Convert to Text removes all table formatting and automatically places each table row into paragraphs. Users may need to additionally adjust the table to ensure the data displays the way they would like it to after selecting this command. Finally, the formula allows for some features of excel to be used in their table to perform calculations.

Illustrations Group



The Illustrations group allows the user to insert pictures or shapes within a document.

Inserting Pictures

The first options are for pictures. Users can insert Pictures that are saved on their computer (or an external drive), millions of online pictures on the internet using Bing Search. While it is possible for users to find a picture on the web, save it to their computer, and place it in the document, using the Insert Online Pictures option is the best method because Microsoft Word provides the citation of the picture, so the picture is properly sourced.

Inserting Shapes, Icons, & 3d Models

Clicking on the Shapes Icon 

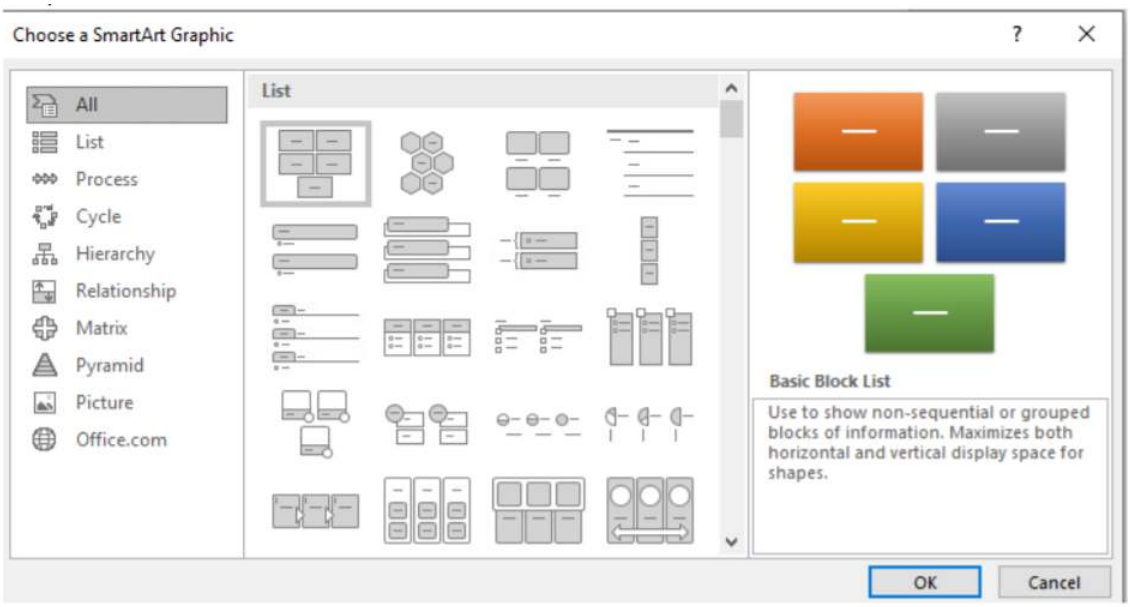
will launch a drop-down menu of an assortment of shapes, lines, and symbols for the user. If the user needs a shape/symbol that is not available, there is even an option to design their own shape. The Icons Icon 

launches an online database of thousands of graphics and emojis to search from. The 3d Models Menu launches a drop-down box with similar search options for 3d Images compared with the Icons launcher. Users can search the web for a 3d image or upload their own.

SmartArt

The Smart Art Icon 

allows the user to insert SmartArt to visually communicate information with diagrams or flow charts. Upon clicking on the Smart Art icon, a multitude of SmartArt Graphical templates launch.



Chart

The Chart Icon 

will allow the user to create a chart using numbers in Microsoft Word. While more attention will be given to charts in the Excel Chapters, users are encouraged to practice the many different chart patterns on their own in Word. Upon clicking on the Chart icon, a new window will launch showcasing all the different chart creation templates available. When the chart loads on the Word Document, an Excel spreadsheet will also load embedded in Microsoft Word's Chart. Changing the numbers will change the appearance of the chart or graph. The Excel Spreadsheet is not visible if printed.

Screenshot

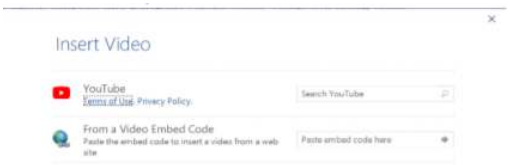
The Screenshot icon 

is the last of the illustrations group. The command allows Microsoft Word to take a screenshot of other open/running programs or Windows Explorer windows to place directly inside the document. Unfortunately, the screenshot tool does not allow the screenshot to be taken inside Microsoft Word. Once the icon is selected, a drop-down box indicating other open arrows can be displayed as eligible to take a screenshot. The portion of the screen to be captured should be highlighted prior to taking the screenshot. Using a screenshot can be incredibly helpful when communicating with others if you are trying to ensure they understand what is occurring on your computer.

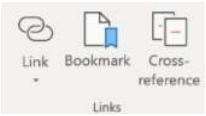
Media Group



The Media group contains one function: Online Video. Users can insert video into their documents that can be played by the user. In this way, Microsoft Word takes on characteristics of a webpage by allowing rich levels of interactive media to be displayed in a Word Document. When selected, two sources for videos are displayed. Option 1 is to search for and insert a video via Youtube. The second option is to insert a video from a website if you have the hyperlink.



Links Group



Link allows the user to create a hyperlink to a website, email address, or a specific location (via a bookmark) in the document. It is expected that any website that is written in a document be hyperlinked. A document appears to be correctly hyperlinked if its color is blue and it is underlined. Users can also allow for bookmarks to be placed in the document. When a bookmark is created, another text must be hyperlinked and connected to the bookmark. When this occurs, a connection is established, and anytime that a user clicks on the hyperlinked item, they are transported in the document to that specific bookmark. To set up a bookmark, first, the user must highlight the text to be marked, and navigate on the Insert Tab to Bookmark. Next, to link to the bookmark from another place, the user must create a hyperlink. When an email address is hyperlinked, the email application of the computer will automatically be launched, and a compose email window will appear with the specified email address as the receiver. Finally, Cross Reference is like a bookmark, except that it displays the specific name of the text that is bookmarked in the word document.

Comments Group



The comments group is useful when the user wants to place a note in the document for themselves or another user that they do not want to be printed. To enter a comment, click on the Comment button after highlighting the text that pertains to the comment. When the Comment button is selected, a new right-side panel of Microsoft Word screen will be created, and the name of the user will be displayed, allowing them to enter in as much text about that specific text. Users can reply to comments, delete comments, and create as many comments in the document as needed.

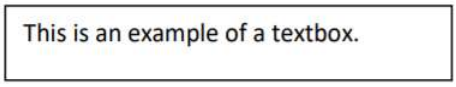
Header and Footer Group



The header and footer group control the text that is displayed at the top and bottom of every page of a document. The top of every page is the Header Row. The bottom of the page is the Footer Row. Text that is inserted into the header row is displayed on every page of the specific section (most documents only have one section, but you can change the header by creating a section break). Often, the header contains the title of the document and the author, and the footer contains the date the document was created or page number. Clicking on the drop-down arrows for header and footer creates standardized options for a header and footer, but the user can customize the rows to their liking. The Page Number command provides options for how to insert page numbers throughout the document. The benefits of Microsoft Word inserting page numbers or doing it manually is that Microsoft Word automatically adds page numbers if pages are modified.

Text Group

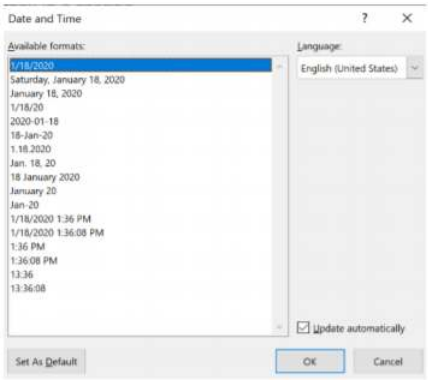




The text group options allow for the insertion of a variety of text options. Text Box allows the user to insert a textbox in a specific space in Microsoft Word. Once inserted, Word treats the text box as a picture in that the text can be resized, moved around, and reshaped in relation to other text on the screen. There are several textbox options to use in word as templates. Quick parts allow the user to create shortcuts in Microsoft Word. For example, a user could create a Quick Part command so that every time they typed “CLC”, Word would convert those letters to “Central Lakes College”. Users often create Quick Type commands so that when they enter their initials, Microsoft Word automatically inserts their entire name. the Word Art command box allows the user to create colorful and artistic text/phrases in their document with a greater degree of flexibility than simply changing the font size.

A drop cap creates a large first letter at the beginning of a sentence. Drop caps are often used in novels and creative writing.

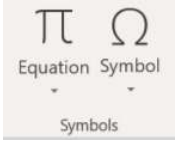
Clicking on the drop cap icon will allow several different options to display the drop cap. The Signature Line command creates a custom field in Microsoft Word where another user must sign. This command allows for e-Signature, or just a preformatted professional-looking field for the signee to return after the signature. Date & Time provides the user with multiple options to display the current date and time in a variety of languages.



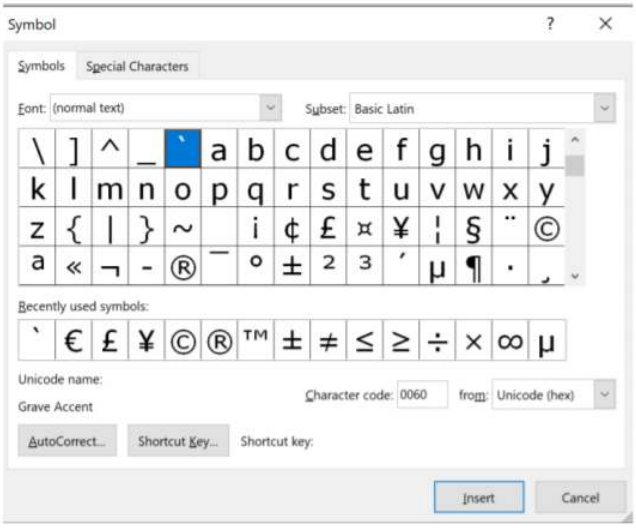
Users are encouraged to insert the date here rather than entering it on the keyboard because Microsoft Word will automatically update the date on the document unless the “update automatically” command box is left unchecked.

Finally, Inserting an Object allows for other Microsoft Office files to be inserted inside of the document, along with options for specific functionality of that file’s application. Users may select this command if they wish to insert an excel document.

Symbols Group



The final insert group, the Symbols group, allows the user to insert an equation or symbol. The Equation option will allow the user to insert a mathematical equation into the document, which is helpful when trying to display complex math problems inside Word. Using the Insert Symbol command allows for Word to provide options for thousands of symbols and characters to be added to the document or text group.



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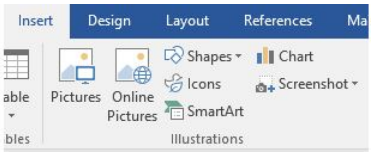
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1.1.9: Graphics, WordArt, and SmartArt

📌 Click here to view Microsoft Word Setting a Foundation Chapter

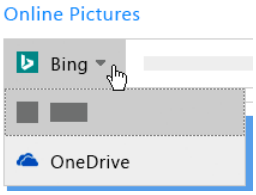
Inserting and Modifying Graphics

It is said that a picture is worth a thousand words. This could be because graphic images make a document more interesting. You can insert photos from your computer or the web, edit them, compress them, resize and re-position them. Word offers a variety of graphics (from the Illustrations group of the Insert ribbon) that can be inserted into documents to add pizzazz to an otherwise dry document.



Illustrations group

A word-processing application differs from a text editor in part due to its ability to perform basic graphic design functionality. As shown in this textbook, the author has inserted graphic screenshots via the Pictures button on the Insert tab. **Pictures** and **Online Pictures** only differ by where the source files reside. The Pictures option will allow you to insert local pictures that reside on your local device. Conversely, Online Pictures allows the user to insert images from the Internet using Microsoft's Bing search engine or OneDrive, provided you have a OneDrive account set up.



Online Pictures

When inserting graphics obtained from the Internet, keep in mind that using someone else's work without their permission is not only wrong but also may be illegal. US Copyright laws control how a copyrighted work can be used. Consider either using public domain images, which are free to use, or images distributed under a Creative Common license, which generally are free, as long as you provide attribution to the owner.

Common Graphic File Formats

GIF (pronounced either "giff" with a hard g or "jiff")

JPG (pronounced "jay-peg")

PNG (pronounced "ping")

Common graphic file formats

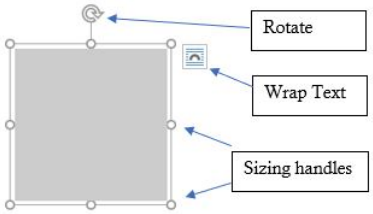
Most of the images inserted via the Pictures and Online Pictures features are likely to be photos. Nonetheless, other common graphics include clip art, scanned artwork, and shapes. Clip art differs from photos when the images consist of simple illustrations. This results in flexible file formats and small file sizes, which explained the appeal to early desktop publishers. However, increased computing resources have marginalized the benefits of clip art, and the rich quality of photos have diminished their demand.



Clip art example

The once popular clip art option is hidden behind the Online Pictures feature. The keyword that is entered into the search box will, by default, retrieve photos, clip art, and other images. However, the filter option, which appears once the original results appear, can further restrict the results to only clip art images, or other image types, specific sizes. layouts or colors.

A complete array of built-in **shapes** can be inserted to complement existing graphics. Popular shapes include lines, rectangles and flow chart symbols. Once a shape is selected, the user needs to draw it on a blank area of the document. Once inserted, the shape, like any other graphic object, can be resized and re-positioned. To move the image, hover the mouse over the image until the pointer is the four arrows, then click and drag to your desired position. To resize a graphic, select the image and drag a corner **sizing handle** to resize it proportionately. The top/bottom or side handles allow the user to resize the graphic disproportionately. The rotate icon allows the user to rotate the object up to ± 360º.

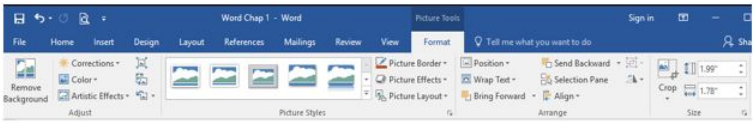


Graphic Editor

Tip

A real useful picture to create is an image of your signature. Use a scanner or take a digital photo of your autograph and save your signature as an image file on your computer. Then insert the file below your typed name in professional correspondence.

Once the graphic is selected, a new contextual tab called the Picture Tools tab will appear on the ribbon. This tab will allow the user to make a plethora of corrections and adjustments to the graphic. Picture styles, effects, layouts, and the image size are common edits to the defaulting graphic. To **resize an image** disproportionately, click the launcher icon in the bottom right corner of the Size group to open the Layout dialog window. Now unmark the Lock Aspect Ratio checkbox.



Resize image

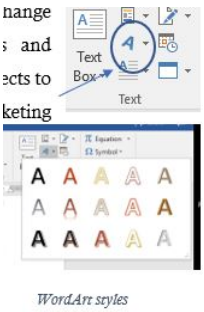
Perhaps the most common feature used in document layout considerations is the **Wrap Text** feature. By default, when pictures are inserted into a document, their layout is set to In Line with Text. This leaves a lot of unnecessary white space to the right of the image. To wrap text around a picture, select the picture, and then select a wrapping option (as shown in the image to the right of this paragraph). Popular options include Tight or Square.



Text Wrap

Utilizing WordArt and SmartArt

Another desktop publishing tool that adds pizzazz to a drab document is the use of WordArt or SmartArt.



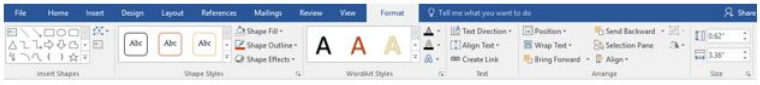
WordArt styles

WordArt is a drawing object with special effects that change the appearance of text by formatting special shapes, patterns and orientations. WordArt can be used to add color, outlines and 3-D effects to regular text. Common usage is titles for papers, posters or other marketing materials. Click the WordArt button in the Text group of the Insert tab. After selecting an initial WordArt style, a placeholder box will appear and await your input of text.



WordArt placeholder textbox

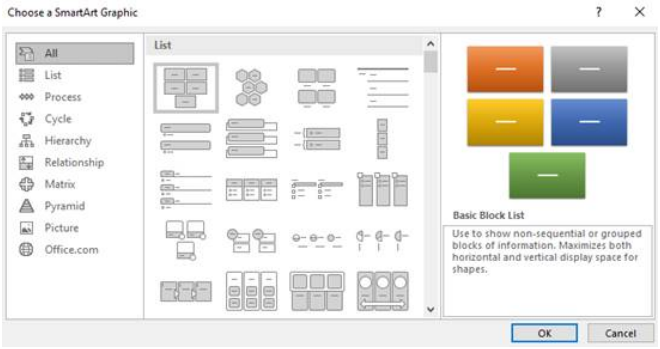
Once inserted, a contextual tab offers numerous to change the effects of the WordArt object. Additional formatting options available include change the text fill, outline or text effects of the WordArt object. The Text Effects offer some exciting ways to rotate and transform the text. The best way to learn about these features is to experiment with them!



Text Effects

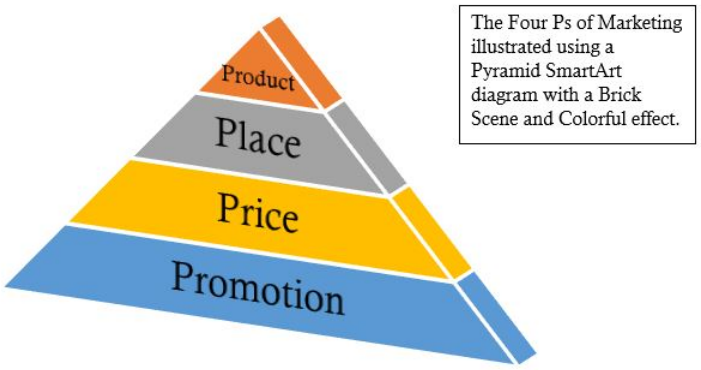
SmartArt are diagrams that illustrate concepts and show relationships between elements. Think of SmartArt as pre-made drawing canvases that you can insert into your document and then customize as you see fit. There are a variety of styles to choose from, which you can use to illustrate many different types of ideas. Simply pick an arrangement, such as a list, process, cycle, etc. Insert the SmartArt via the Illustrations group on the Insert tab, which opens the SmartArt dialog window.

After choosing a layout, a SmartArt placeholder will appear. In a SmartArt graphic, elements are represented by shapes. Each shape can have text applied, be resized and re-positioned. You can even add, delete, promote and demote shapes via the text pane or the contextual tab.



SmartArt dialog

A SmartArt graphic can be formatted and edited using options on the contextual SmartArt Tools Design and Format tabs. The Design tab allows the user to pick from numerous layouts, styles and colors. The Format tab provides choices for shape styles and WordArt options. SmartArt can be utilized throughout the Microsoft Office suite of applications. Again, the best way to learn about these options is to experiment!



SmartArt pyramid

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1.1.10: Document Design

📌 Click here to view Microsoft Word Setting a Foundation Chapter

Styles and Themes

Learning Objectives

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

- Apply themes and styles to a document
- Use the Page Background command group

When creating your WorldCorp market trends report, you may choose to use custom formatting or existing formatting to add styles to your document. You can achieve this via the options on the Design tab, by using existing templates in Microsoft Word, or through combining those options to customize a template. Some companies may have existing templates with logos, fonts, or colors that are part of the company brand. The Design tab offers many options for quickly changing the graphical formatting of your document, applying styles across the entire document so you do not have to manually make each change. You can change the color scheme, fonts, and paragraphs, either manually or using the themes and styles in Word.

You may also opt to use a template. Templates are predesigned documents for a variety of purposes, including reports, résumés, flyers, invitations, posters, and more. The advantage of a template is that it already has a design applied. However, you need to ensure the template you select is appropriate for your audience and purpose, and that your content will fit well in the template.

Using Styles and Themes

Your supervisor has suggested that you apply a theme to the WorldCorp market trends report. A theme is a cohesive set of fonts, font sizes, and colors that can be applied to your whole document. However, before you apply a theme to your document, you must “code” your document’s style. Styles are preset formatting for font type and size, line spacing, and other formats that are used to change the appearance of text in a document. Generally, you choose the style for the document before beginning to input the text. By choosing the style, you are coding the document so that Word knows how to format various sections. These codes tell Word which parts of the text are body text, titles, subtitles, and so on. Without these style codes, the theme won’t know how to apply itself to your document.

Styles Pane

Before you can implement styles, you first must label, or code, all the styles in your document. This means selecting parts of the text and using the Styles pane on the Home tab to identify them. For example, all body text must be selected and the Normal style applied; all headings must be labeled as Heading 1, Heading 2, and so on. Once all your text has a style applied, then you will be able to use the themes and styles to full capacity.

You can change the default fonts and font styles in the Styles pane, as Figure 3.31 shows. For example, if the default Normal font is Times New Roman, you may want to change it to Calibri. Then, when you select a segment of text and choose the Normal style, it will make the font Calibri, not Times New Roman. In effect, you are telling the program what you consider as “Normal” text font in this instance.

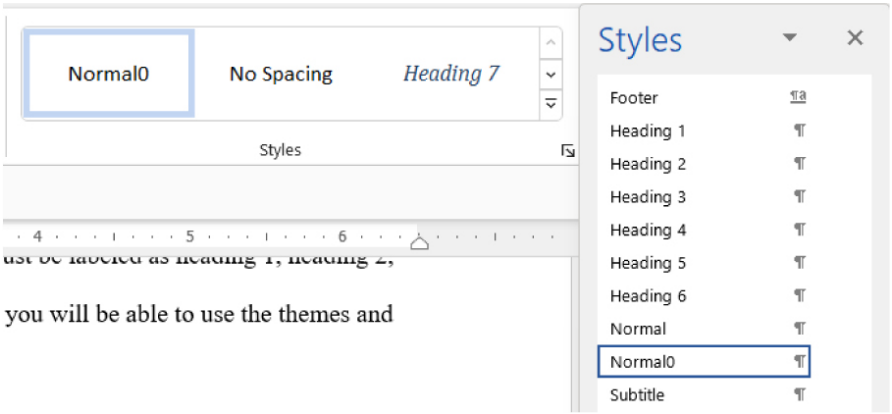


Figure 3.31: The Styles pane allows you to assign each part of a document a functional style, which can then coordinate with Word's existing themes. Hovering over each style choice will reveal the changes to the text block in which you have placed your cursor. (Used with permission from Microsoft)

This is the manual way of applying styles. But the real power in using styles is to simply use them as identifiers for your text so that themes can "read" and style the text properly. For example, it wouldn't matter if you chose Calibri as your Normal font style; if you select the "Madison" theme, for instance, the new Normal font will automatically change to Arial, because that is what comes with the theme. Different themes have different Normal font settings. To see what font a theme uses, you will need to select the theme and see the fonts it uses. Now, let's explore how to apply a theme and why it works so well with styles.

Applying Themes

Let's revisit the different headings of the market trends report we worked on in Formatting Document Content in Microsoft Word. Go to the Design tab and select the drop-down menu called Themes. You'll see that there are over a dozen default themes built into the software (Figure 3.32). As an exercise, choose the "Ion" theme for your document. Selecting "Ion" changes all the available styles in your document. If you want to further change the theme, you can change the color scheme using the Colors menu on the Design tab. There are many different color palettes to choose from. Word offers these preset palettes because designers have determined that the colors work together well to give documents a cohesive, professional appearance.

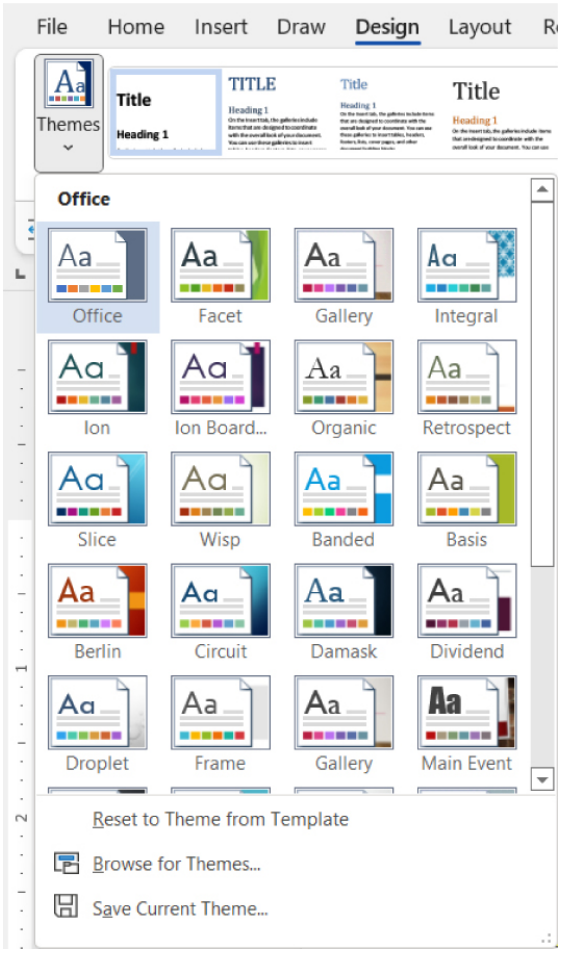
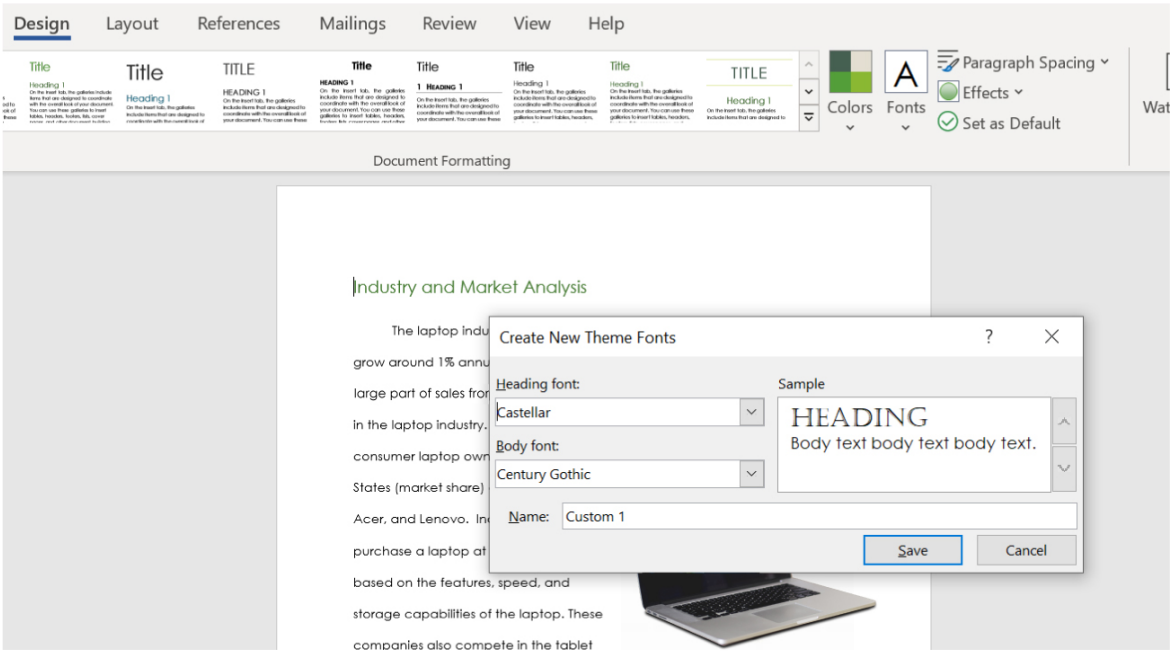


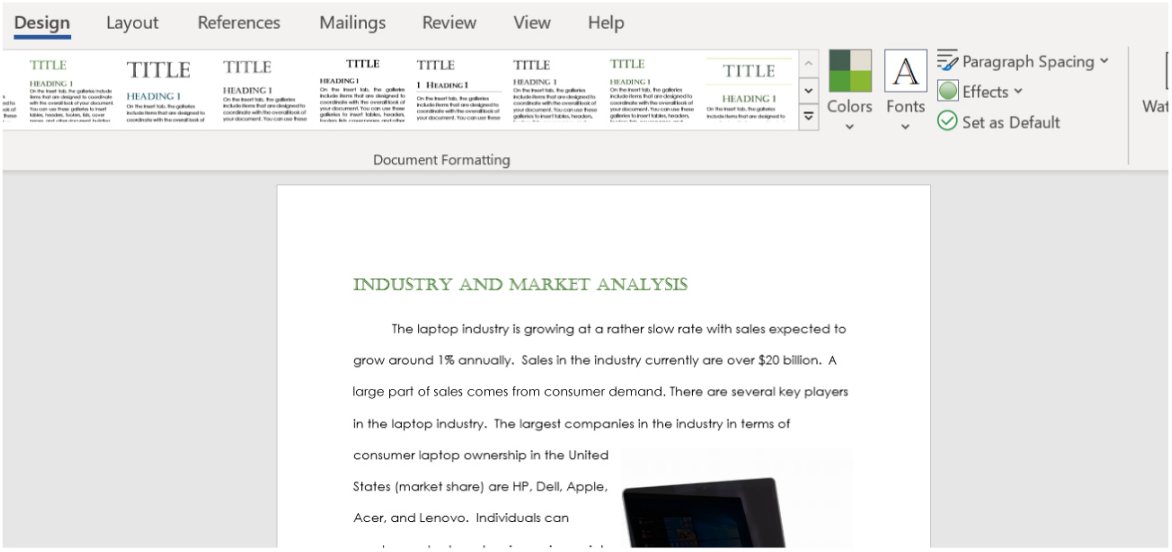
Figure 3.32: Word offers a variety of themes, each with its own set of fonts, colors, and styles. (Used with permission from Microsoft)

You can change the colors and fonts associated with the selected theme by choosing the menus on the Design tab. Choose the Green color group and Arial font and apply it to the report.

When you change the color and font, all headings and titles of the section will change in one step. There is no need to select each heading one by one because you already coded your document with the correct styles before you applied the theme, so the theme knows which text is which type of heading, and so forth. In the template, the current font of the Normal text is Corbel. By selecting the Fonts drop-down menu, you can change all of the Normal text and/or Headings font. Go to the bottom of the drop-down Fonts menu and select Customize Fonts. A new dialog box will appear with all the fonts installed in Office, as seen in Figure 3.33. Choose a new font and select Save and the headings will be changed.



(a)



(b)

Figure 3.33: You can modify the fonts in components of a theme, such as headings, and they will change from (a) the default font associated with that theme to (b) the customized font you select to apply. (Used with permission from Microsoft)

Page Background Command Group

The Page Background command group on the Design tab allows users to apply a page border, page colors, and watermarks. A watermark is a lightly colored image, logo, or text that exists in the background of the document. Like changing the page background color, adding a watermark will apply to the whole document. Some companies choose to use watermarks to indicate the status of a document (e.g., “Draft”) or to imprint their company name on each page of the document. To insert a watermark, select the Watermark icon and choose Custom Watermark, as you can see in Figure 3.34.

As an example, let’s add a watermark to the market trends report to indicate that it is a private, internal document. Type “Confidential” into the Custom Watermark dialog box and have it run diagonally across the page. There are a few options to alter

the text's appearance on the page. For instance, if you want to change the text to be less visible, choose Semitransparent. You can even use an image, like a company logo, as a watermark.

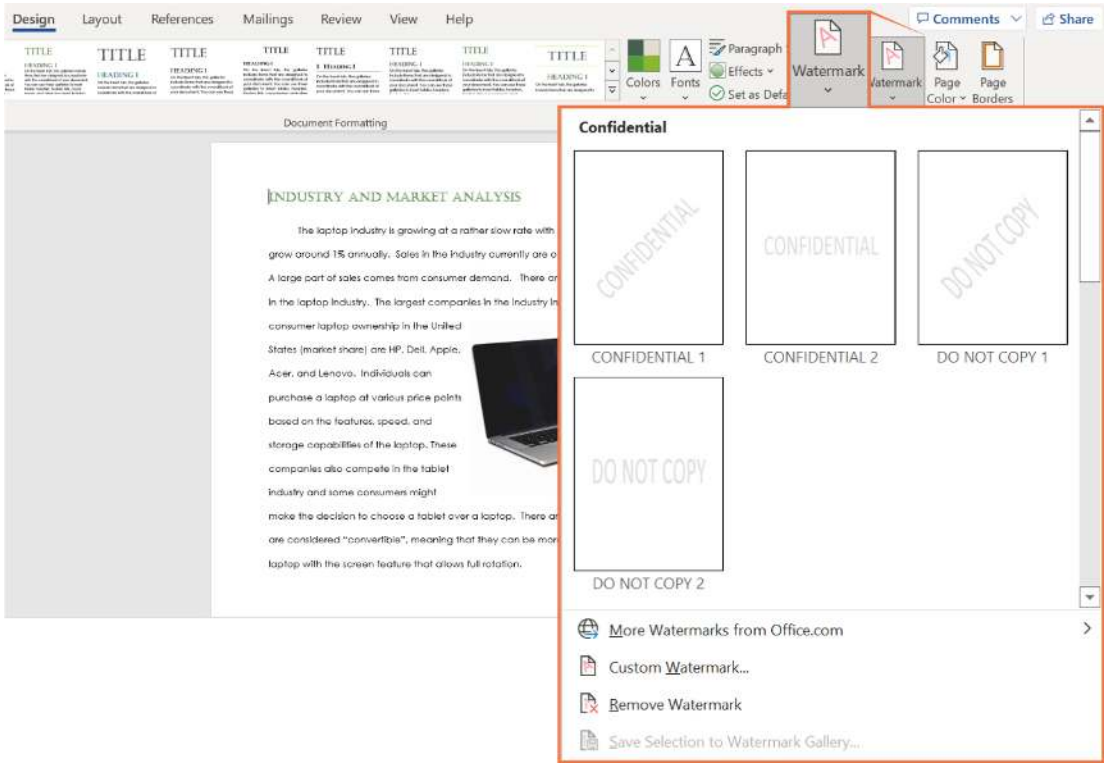


Figure 3.34: You can insert customized watermarks such as company logos using the Custom Watermark option. (Used with permission from Microsoft)

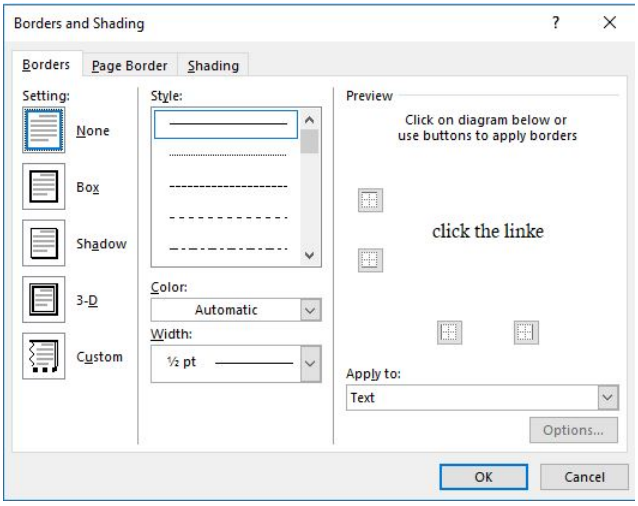


Figure 3.35: Watermarks are used to display letters or images on the page background. (Used with permission from Microsoft)

Borders and Shading

Borders add interest and emphasis to your document. Borders make attractive frames for text, pictures, tables, or entire pages. You can customize borders to complement your document by experimenting with Word's built-in styles. To add a border to text, select

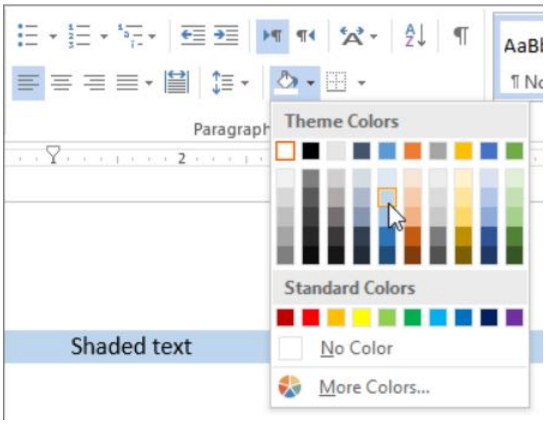
the text. On the **Home** tab, click the small down arrow next to the **Borders** button, and choose an option OR choose the Borders and Shading option to open the Borders and Shading dialog window.



Borders and Shading

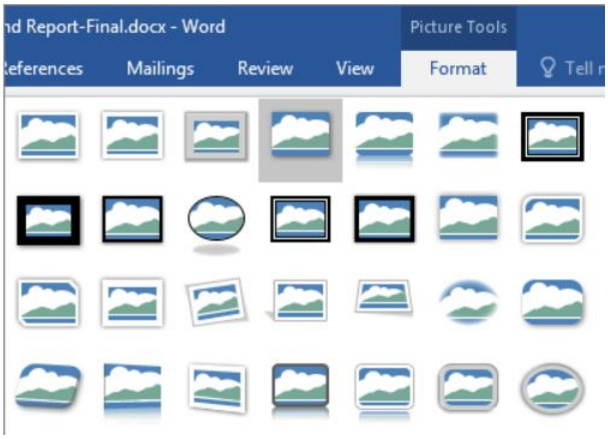
Make sure the Apply to box is set to Text, which adds a border around lines of text, or Paragraph, which creates a border that outlines the paragraph. Also make sure that a choice, like Box, is selected under the Setting option.

Shading is the color or artistic design you use as background for a paragraph. By shading words or paragraphs in Word, you can create visual interest in a document. The **Highlight** command offers a more limited color selection, which you can use when you review or edit a document to highlight specific text. The shading fill, style, and color can be defined from the Shading tab of the Borders and Shading window. To apply shading to a part of a document, select the data, then click the arrow next to Shading, and under Theme Colors, click the color you want to shade your selection.



Shading palette

Borders can also be added to pictures. Just select the picture, then choose a pre-formatted border from the Picture Styles gallery off of the Picture Tools Format tab.



Picture styles gallery

To remove the paragraph borders and/or shading, choose the None option in the Borders and Shading window. In the Shading tab choose the No Color item in the Fill section, and choose the Clear style in the Patterns section.

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CHAPTER OVERVIEW

2: Microsoft Word - Building Proficiency



Microsoft Word -Building Proficiency

This page discusses advanced features of Microsoft Word, including advanced formatting techniques, the Design and Layout tab, paragraph alignment, and header/footer management. It also covers the Reference tab for citations, graphic and text tools, table formatting, and document type management, as well as tips for handling long documents and saving files in various formats.

2.1: Microsoft Word - Building Proficiency Sections

2.1.1: Microsoft Word - Advanced Formatting Features

2.1.2: Design and Layout Tab

2.1.3: Setting Paragraph Alignment and Hyphenation

2.1.4: Headers, Footers, Page Orientation, and Margins

2.1.5: Using the Reference Tab for Citations and Bibliographies

2.1.6: Working with Graphics and Text Tools in Microsoft Word

2.1.7: Creating and Formatting Tables

2.1.8: Creating Different Document Types in Microsoft Word

2.1.9: Managing Long Documents in Microsoft Word

2.1.10: Printing and Saving Files in Alternative File Formats

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SECTION OVERVIEW

2.1: Microsoft Word - Building Proficiency Sections



Microsoft Word -Building Proficiency

This page discusses advanced features of Microsoft Word, including advanced formatting techniques, the Design and Layout tab, paragraph alignment, and header/footer management. It also covers the Reference tab for citations, graphic and text tools, table formatting, and document type management, as well as tips for handling long documents and saving files in various formats.

Topic hierarchy

2.1.1: Microsoft Word - Advanced Formatting Features

2.1.2: Design and Layout Tab

2.1.3: Setting Paragraph Alignment and Hyphenation

2.1.4: Headers, Footers, Page Orientation, and Margins

2.1.5: Using the Reference Tab for Citations and Bibliographies

2.1.6: Working with Graphics and Text Tools in Microsoft Word

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2.1.1: Microsoft Word - Advanced Formatting Features

📌 Click here to view Microsoft Word Building Proficiency Chapter Overview

Word Scenario

Your supervisor has read the first pages of the WorldCorp market trends report, which you have written with the collaboration of your coworkers. Your supervisor adds some edits and comments, and is ready for you to finalize it. This means inserting final art, updating charts and graphs, adding navigational tools such as bookmarks and headings, tidying up the organization and appearance of the document using lists, and formatting the bibliography.



Figure 4.1: Learning how to properly format a document can make your documents look more polished and professional. (credit: "wocubtech (microsoft) - 114" by WOCinTech Chat/Flickr, CC BY 2.0)

Using the advanced formatting tools in Microsoft Word and Google Docs means understanding these programs and their features in more detail. These tools enable the user to go beyond writing and formatting a basic text document, and will lead to the production of documents and reports that look and feel professional.

Advanced Formatting Features

Learning Objectives

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

- Use advanced configuration tools in Word
- Insert and format page numbers in a document
- Insert and format headers and footers in a document
- Insert and format a list

Your supervisor at WorldCorp has asked you to revisit the market trends report that you started in the Creating and Working in Documents chapter. The report needs to have multiple sections that may need different types of formatting based on the content in the section. You may need to update the headers and page numbers, as well as add numbered or bulleted lists to summarize main points. You will also need to insert graphics and charts to enhance the report.

This chapter covers how to take the market trends report to the next level by learning to insert visuals and formatting items, such as a table of contents, as you would expect to see in a professional report. First, you will work on the Industry and Market Analysis section from the previous chapter. Then, you will build content for the other important sections.

To get started, revisit the market trends report you created in the Creating and Working in Documents chapter. Using the skills from that chapter, format the headings for the document as shown below, using a theme you find professionally appealing. Use the following section headings for the document:

- Introduction/Executive Summary

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

You created the Industry and Market Analysis section in the last chapter. You can use that document as the starting point. See Figure 4.2. The chosen theme is "Berlin," with the colors changed to Blue II, but you can choose a different theme for your document if you prefer.

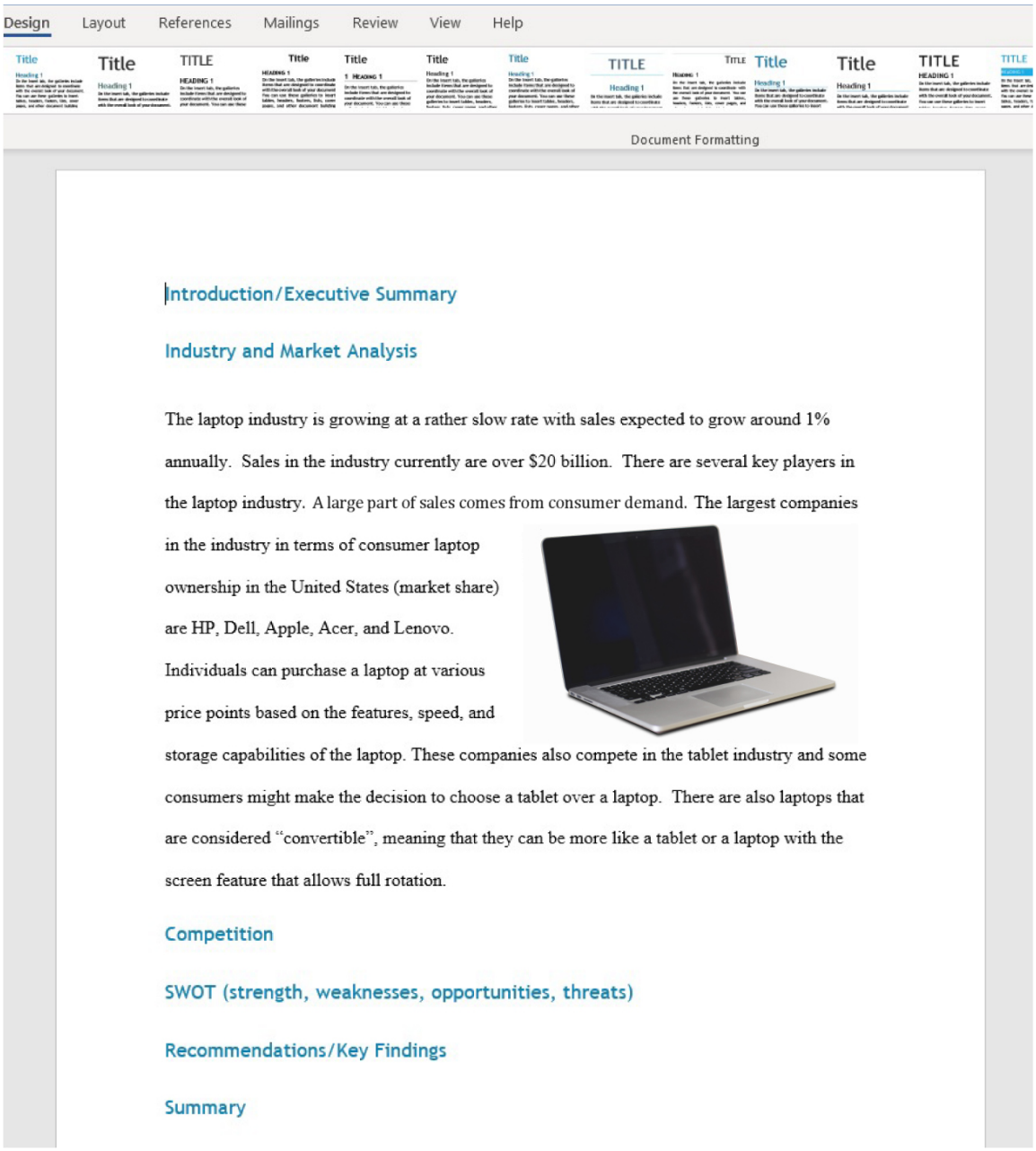


Figure 4.2: The first draft of the report has its major headings, under which you can add body text. (Used with permission from Microsoft)

Advanced Configuration

As you learned in the chapter Essentials of Software Applications for Business, the File tab contains the configuration options for Word. As the market trends report evolves, you will be collaborating with others to produce the final report. You want to make sure

the document options are set so that you can keep track of the contributors to the document. Recall that you can enter Word's settings by choosing Options from the very bottom of the File menu. The Word Options dialog box shown in Figure 4.3 shows eleven different sets of settings tabs, from General to Trust Center. It is helpful to learn about these settings because the settings in Options allow you to adjust the editing options, save options, and sharing options for the program. The options can be adjusted to your personal preferences as you work through the document on your own and collaborate with others.

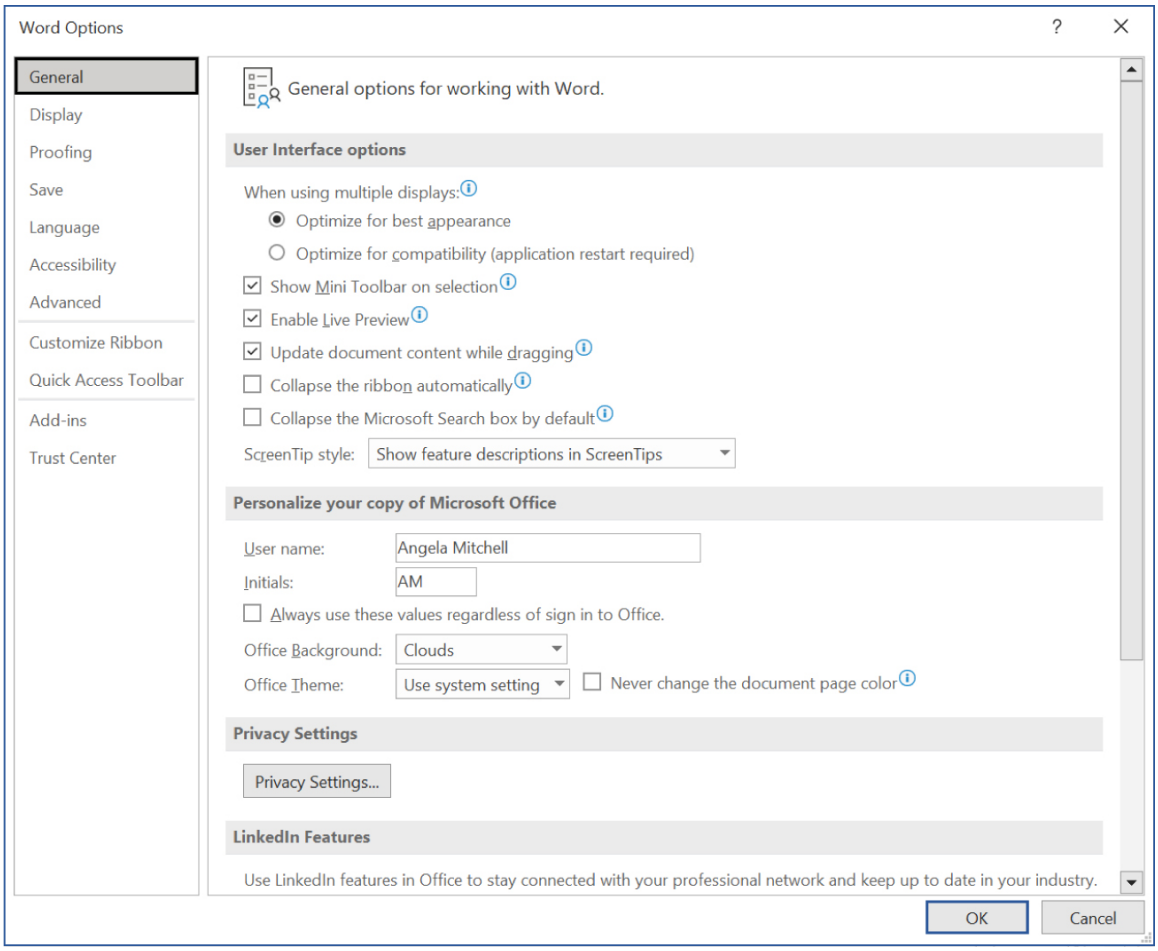


Figure 4.3: The Word Options dialog box offers many different choices for configuring your settings. (Used with permission from Microsoft)

Mac Tip

To view the same General options in Word, click the Word tab and choose the Preference tab. That is where you will find many of the options discussed here.

First, the General tab lists information about the user. This will auto-populate based on the software registration and computer settings. You can change the document's username, which means that all of your comments and tracked changes will have your name associated with them. You also have the option of turning on "Real-time collaboration," in which your changes to the document will be broadcast to the document's collaborators. (This feature is similar to Google Docs's concurrent editing notification of documents.) This is available to users who are working on a shared file through Microsoft 365. The document must have already been shared with the collaborators, and they need to have been given permission to edit the document.

The second tab is Display. This tab includes options for adjusting how the text is seen on-screen. One of the more important options is the ability to turn the formatting marks on and off because it enables you to see if you have line breaks or extra spaces, as well as formatting settings in your text. Hidden characters that direct how text is displayed but that don't show when the document prints are called formatting marks. They have their roots in the paper-and-pencil editing process in which editors used standard markings or symbols to indicate different things. For example, the ¶ is used to represent a hard return (i.e., a new line). These formatting

marks might be similar to the editing and revision marks that you may have seen when getting a graded paper back in an English class.

The third tab, Proofing, contains powerful tools for reviewing document edits. From this tab, you can turn various autocorrections on or off. Word provides the user with several convenient autocorrections, such as correcting for two capital letters at the beginning of a sentence, capitalizing a sentence that starts with a noncapitalized word, and correcting commonly misspelled words. You can also access the number of custom dictionaries that you have saved. A custom dictionary is essentially a collection of defined words that you provide to Microsoft. When you are typing in Word and use a word that is not in the default dictionary, you can choose to have the word added to the dictionary in the program. For example, when you type “WorldCorp” in Word, it will be identified as spelled incorrectly (see Figure 4.4). If you right-click on the misspelled word, Word gives you suggestions or you can choose to have the term added to the dictionary. This will create a custom dictionary by default that can be added to each time you choose to Add to Dictionary.

The key benefit to making a custom dictionary is that you can populate it with appropriate words and terminology for documents that you work with frequently. This way, they will not come up as a spelling mistake or a term used incorrectly when using spell check. A word of caution: When you add words to the dictionary, they are added in exactly as you spell them, even if you accidentally misspell them. You should make sure when you are adding words to the dictionary that they are indeed spelled correctly.

To look at the custom dictionaries that are currently saved, click on Custom Dictionaries. You can also review and edit the word list in the dictionaries. This can be useful when you are writing different types of documents. For example, in legal documents, you might use one custom dictionary, and in economics research documents, you might use another.

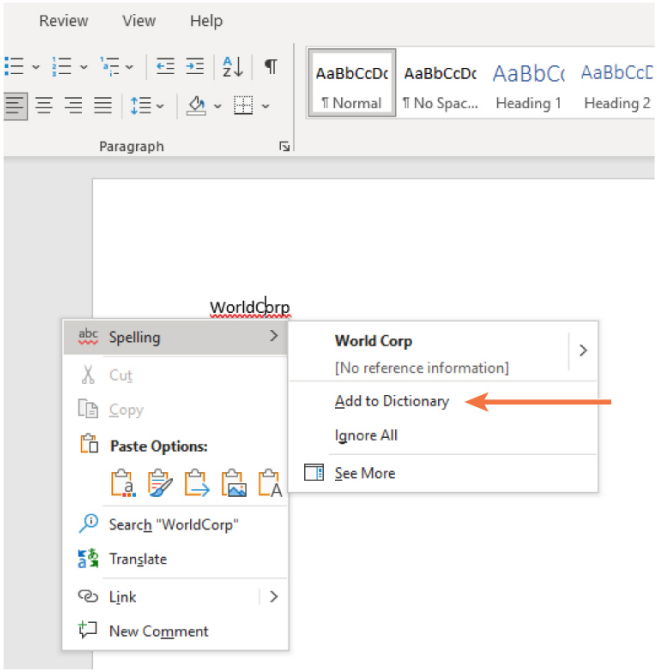


Figure 4.4: Adding words to the custom dictionary can be helpful if you use noncommon words or acronyms regularly. (Used with permission from Microsoft)

Another important tab is the Advanced tab. This one is the most versatile of the tabs, as it contains options for formatting, autocorrect, cut and paste, sizing of images, document viewing and display, and printing. These settings are considered more advanced because they go beyond basic settings. You might find some helpful settings in Advanced that you did not know you could change that could improve your efficiency with the program. The additional settings are separated into several major groupings:

- Editing
- Cut, Copy, Paste
- Link Handling

- Pen
- Image Size and Quality
- Chart
- Show Document Content
- Display
- Print
- When Printing This Document
- Save
- Preserve Fidelity
- General
- Layout Options
- Compatibility Options

As you can see, the list of settings is quite extensive. Spend a little time browsing through all the items that you can change or add to Word documents. You might also enable some commands or settings to see how they work for you as you construct the market trends report.

There are instances in which you might want easy access to some frequently used tools. You can add those to the Quick Access Toolbar, as the chapter on Essentials of Software Applications for Business discussed. By default, the Quick Access Toolbar is located in the upper left of the Word window above the ribbon, and it has three default commands: Save, Undo, and Redo. By customizing the Quick Access Toolbar, you could easily access heavily used commands, such as Word Count or Insert Comment.

The last tab to discuss is the Trust Center (Figure 4.5).

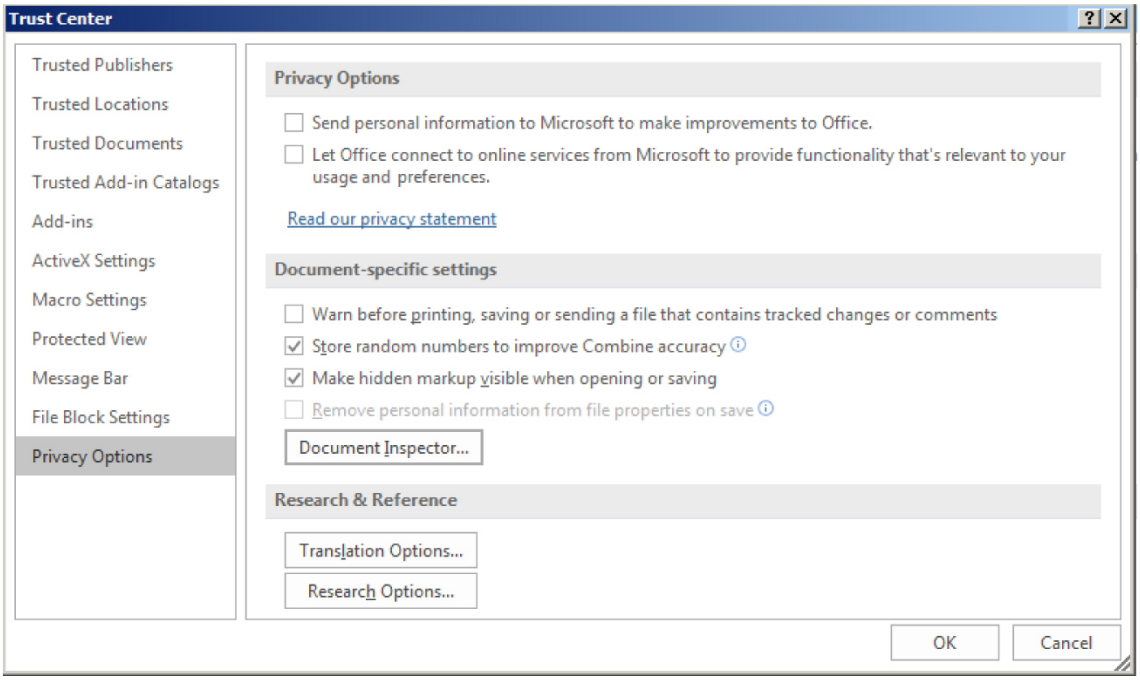


Figure 4.5: The Trust Center shows privacy settings that you can customize in Word. (Used with permission from Microsoft)

As you select that tab, you'll see a button that says Trust Center Settings; select that next. Then, you'll see the many tabs of the Trust Center. Under Privacy Options, you will find Document Inspector. If you select Document Inspector, you will be prompted with a list of items the inspector will scan for. Make sure the Document Properties and Personal Information option is selected. Click Inspect and the tool will scan the document for hidden information in the file such as your personal information or comments that are linked to your name. After scanning, a results window will appear often with a warning that all of your personal information will be removed if you continue with this process, as shown in Figure 4.6. Sometimes, for example, you may need to send the document to a third party, and you don't want to send all the versioning of the track changes or comments.

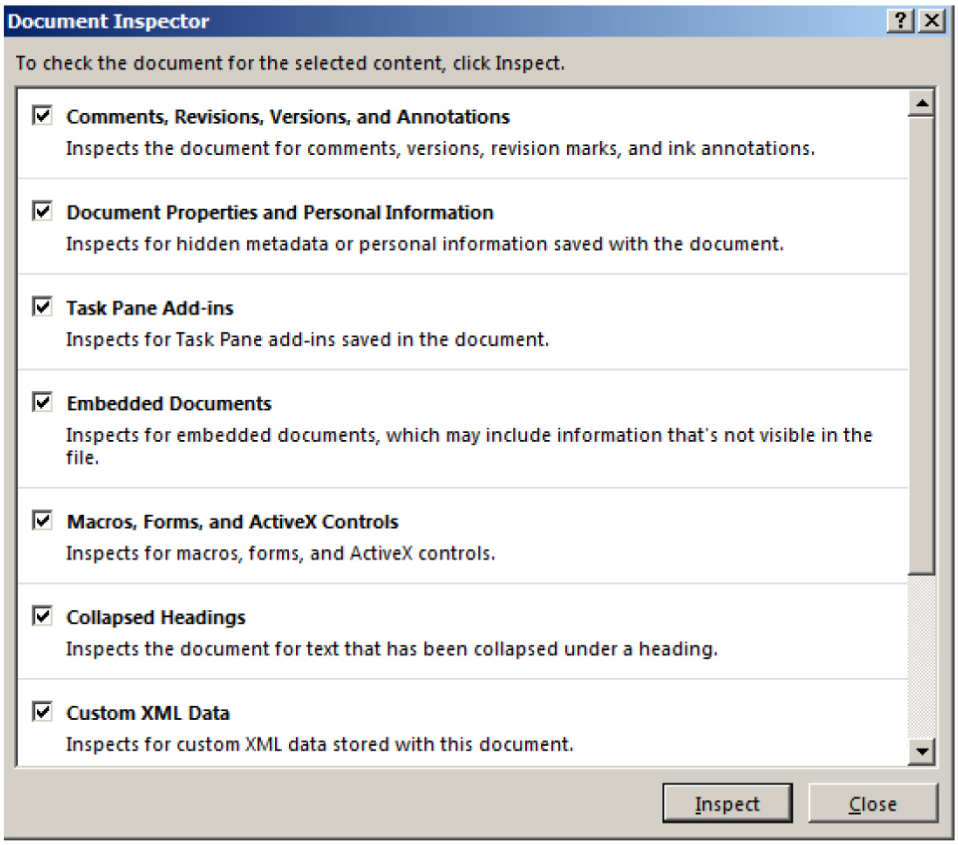


Figure 4.6: Word has many configurable settings that can help the user customize the program and make creating and editing documents as easy as possible. Selecting Document Inspector allows you to remove your personal information from a file. (Used with permission from Microsoft)

Page Numbers

Most professional documents need page numbers. You will likely see page numbers on business plans, marketing plans, strategic plans, or any kind of business report. The process of adding page numbers to your document so that they automatically update as you build the document is called page numbering. Recall from the Creating and Working in Documents chapter that to insert a page number, you go to the Insert tab, and then find the Page Number drop-down menu. You can choose to place the page number in four different places: top, bottom, margins, or current position. Normally, business reports have the page numbers at the bottom of the page, and you can choose to have your page numbers on the left, center, or right. You can also format the page number field with various fonts and styles, as you can see in Figure 4.7.

Let’s add page numbers to the market trends report. To begin, go to the Insert tab and then go to the Header & Footer command group. Choose the drop-down arrow at Page Number and choose Bottom of Page. For this example, choose Accent Bar 2, which adds the page number on the bottom right of the page with some nice formatting. Notice when you add page numbers, you get a Header & Footer tab that allows you to make additional changes to the page numbers if desired.

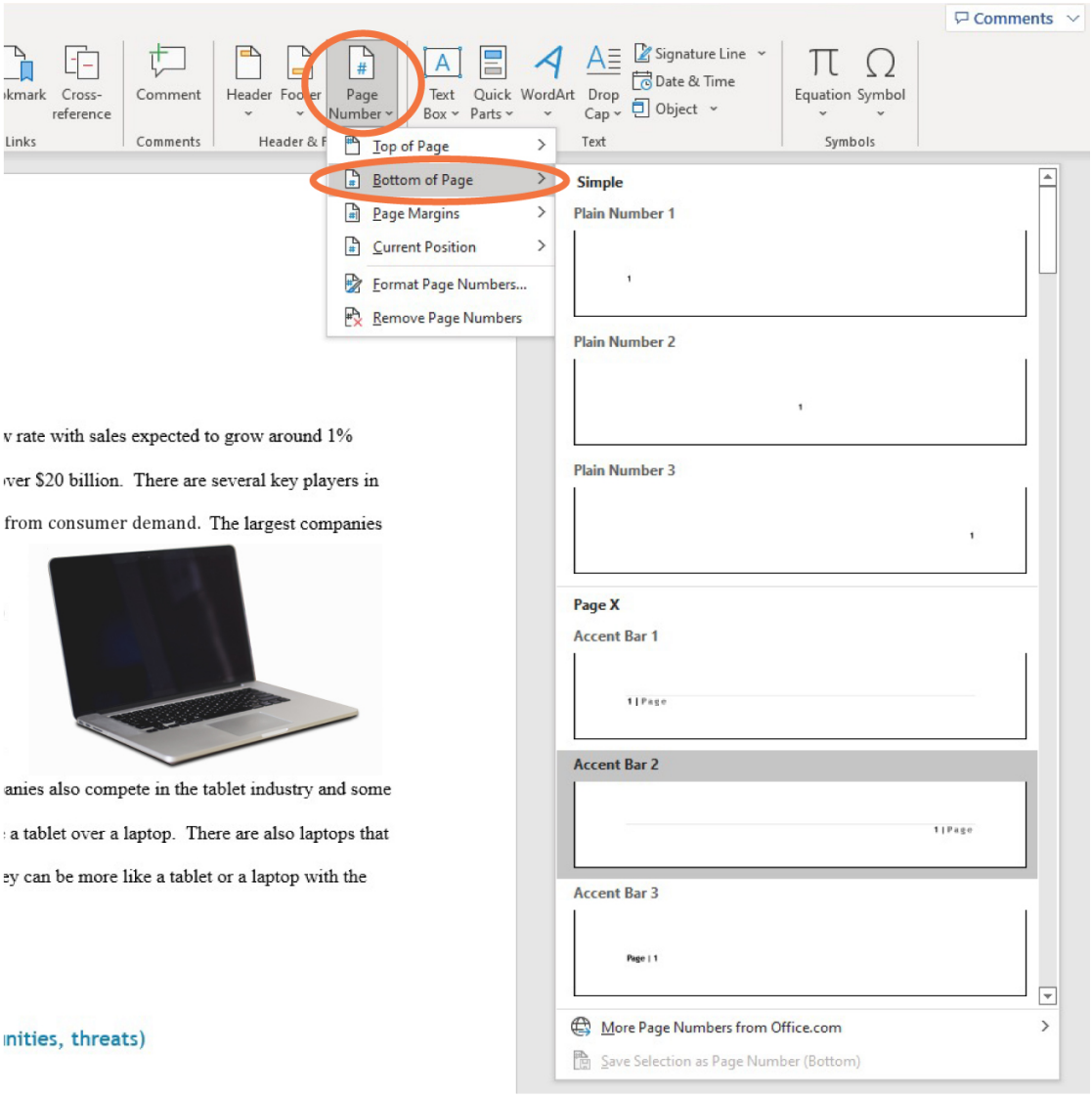


Figure 4.7: The Accent Bar 2 page numbering style automatically chooses a font and style for your page numbers. (Used with permission from Microsoft)

You can tailor your page numbers to your differing document sections. You can choose to start your numbering in a different place than the beginning of the document, as seen on the Header & Footer tab options. For example, if you have a cover page, you generally do not include a page number on that page. It is also possible to only number the pages in one particular section. You may choose the number format (Roman, alphabetic, or Arabic numerals). You could choose to have the pages numbered per section rather than numbering the document in its entirety starting from one. This is rare, however. You will most likely see a business document numbered from the beginning and continuing on in each section rather than starting over.

Headers and Footers

Have you ever opened a book and seen the title at the top of every page? This area of the page is called the header, in which you can put essential information about the document, such as the name, chapter name, author, and page numbers. The header will appear on every page of your file by default, but you can change this if desired, as will be discussed later in this section. If you glance at the bottom of a page, you may see the text “Page x,”; this is part of the area of the page called the footer. Many documents simply use the footer for page numbers, but you may also add your contact information, the document file name, or the contact information and logo of your company.

For the WorldCorp market trends report, we want a header that indicates the title of the report, along with the year. To insert a header, go to the Insert tab and look for the Header icon drop-down menu. As with page numbers, headers come in a few different

formats. Choose the Banded format, as Figure 4.8 shows.

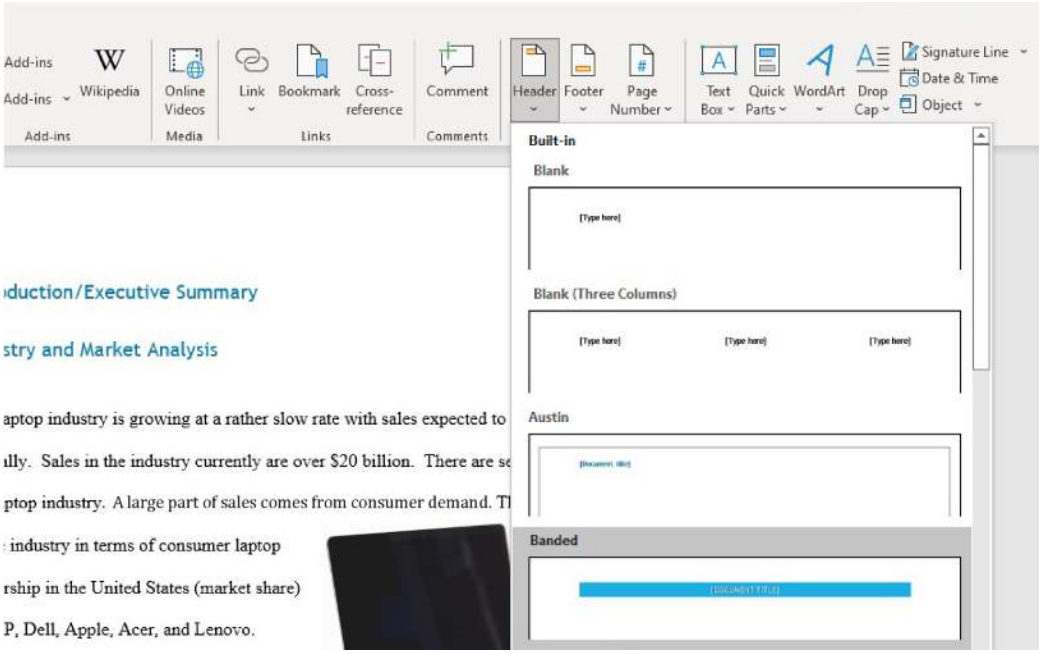


Figure 4.8: Just like the page numbers, the headers can be plain text, or formatted with designs. (Used with permission from Microsoft)

To insert the desired header information, simply click on the header itself to add the header text. From here, there are additional options to edit the header using the commands in the Header & Footer command group, as shown in Figure 4.9. The Document Info and the Quick Parts commands on the Insert tab can also help you add your document information or company information.

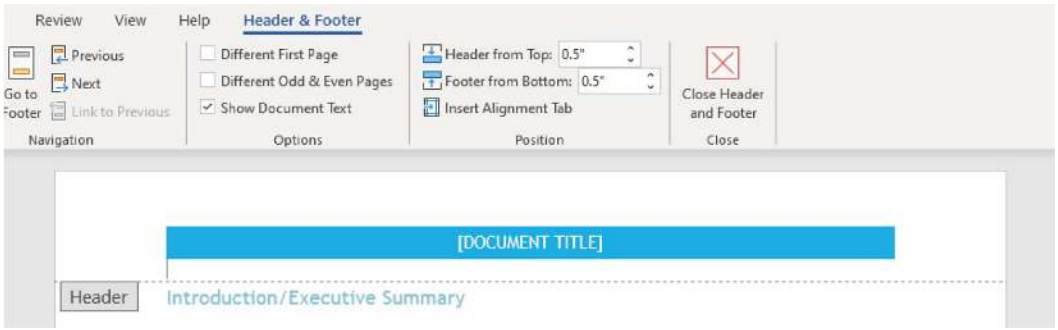


Figure 4.9: When you insert a header, the Header & Footer tab appears, where you can make further adjustments as desired. (Used with permission from Microsoft)

In Figure 4.11, you can see all that data available to the header. Select Company Address, for example; note that the information contained in these fields is in the document properties as covered in Essentials of Software Applications for Business. If these fields have not been filled out in document properties, the tool will simply insert “Company Address” into the header. You will have to enter the required information there.

The header is fully viewable by default, but sometimes you may want to hide it when writing the document, rather than seeing the white space dedicated to the header. To toggle off the header, go to the View tab, and select either Read Mode, Web Layout, Outline, or Draft. The only view mode in which the header can be seen is Print Layout.

Some business reports do not have a header on all pages or have different headers on odd versus even pages; this is called an alternating header. For example, you might want to include the report title on the even pages and the section title on the odd pages. To accomplish this effect in your document, just click on Different Odd & Even Pages. This way, one page will not have the header, and one page will.

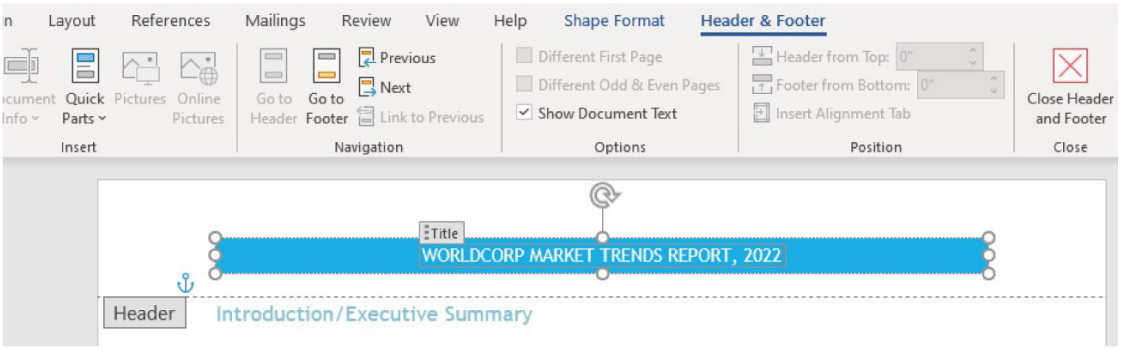


Figure 4.10: You can type directly into the header area, just as you would in the main page area. (Used with permission from Microsoft)

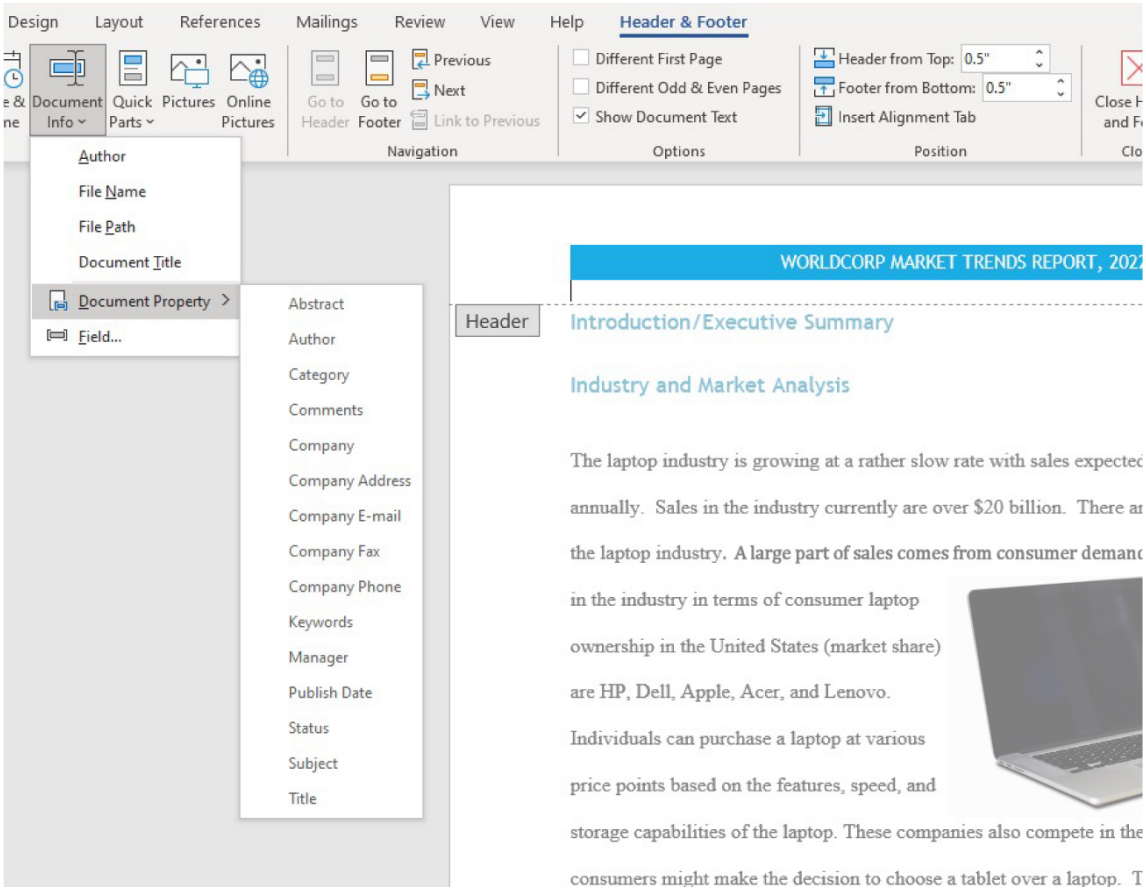


Figure 4.11: You can set up the document to include useful, company-specific properties that can quickly be added to the header. (Used with permission from Microsoft)

The steps to insert a footer are exactly the same as inserting a header: Select the drop-down menu Footer. The header, footer, and page numbers should have similar designs so that your document has a cohesive feel.

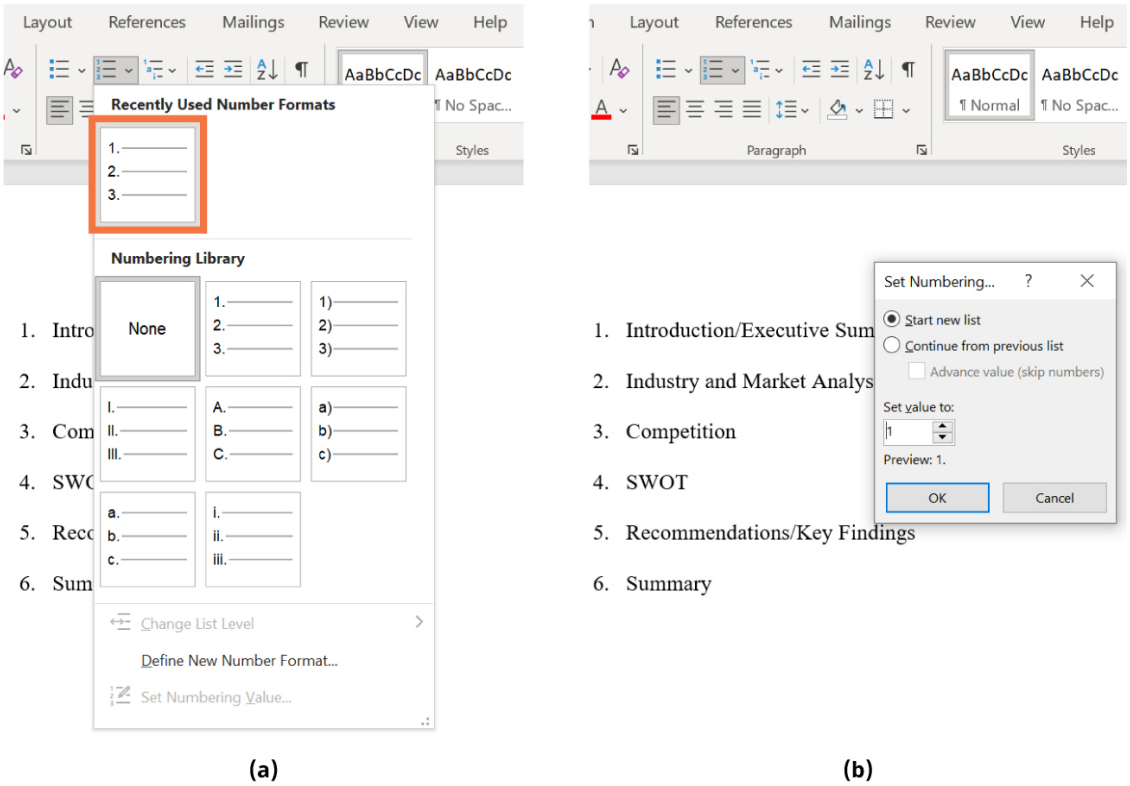
Lists

As you are crafting documents, you may find that some information is better suited to a list, rather than a paragraph of text. You learned about lists in the chapter on Creating and Working in Documents, but here you will go into more depth. Lists are useful for summarizing a long topic. The market trends report will certainly include lists, such as a list of competitors, major markets, and major product lines. Pulling information into a list can bring it to the reader's attention and help the flow of the document by preventing it from getting bogged down in page after page of paragraphs. You can choose to put text into a list after typing into the document or you can select your list type before beginning to compose the text.

There are four types of lists in Word: bulleted, numbered, lettered, and multilevel. A multilevel list has two or more different levels, and often combines different types of lists, such as numbers and letters, or bullets and Roman numerals. Different types of lists are appropriate for different purposes. For example, numbered lists are useful for indicating a sequence or order, while bulleted lists can be good for summarizing. Any type of list—numbered, lettered, or bulleted—can be made into a multilevel list.

Numbered and Lettered Lists

To create a numbered or lettered list from text already in the document, select the lines of text you want to create a list from and choose the Numbering drop-drown menu from the Home tab. In Figure 4.12, you can see the list format we chose: a number with a period after it. You can further customize your list by choosing a different starting number or letter, or by continuing your list from a previous page or list. This can be useful if, for example, you start a numbered list on one page, have a paragraph or two of text, then want to continue with the same numbering sequence. Select the entire list, go to the Numbering drop-drown menu, and select Set Numbering Value.



(a) **(b)**

Figure 4.12: (a) Both numbered lists and lettered lists are available in the same drop-down menu. (b) You can choose to start your list at any number, or continue from a previous list. (Used with permission from Microsoft)

You can also change the indentation in the list. Select the entire list and go to the Layout tab. In the Paragraph command group, you will see fields for typing in custom indents. In the Left box, type in your desired indent amount; 0.5 inches is a standard amount.

Bulleted Lists

Creating a bulleted list is a similar process. But unlike a numbered list, a bulleted list does not create a hierarchy. Instead of selecting the Numbering drop-down list, choose the Bullet drop-down list, and select the type of bullet you want to use for your list, as shown in Figure 4.13. You can either create your bulleted list from regular body text, or you can convert an existing numbered or lettered list to a bulleted list. To change from numbered to bulleted format, just reselect the list and go back to the Bullet drop-down menu and select the new format.

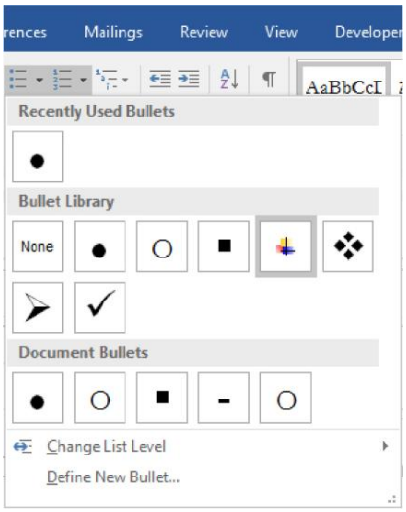


Figure 4.13: Different bullet designs may indicate different things. A checkmark list, for example, might be useful for a to-do list. (Used with permission from Microsoft)

Multilevel Lists

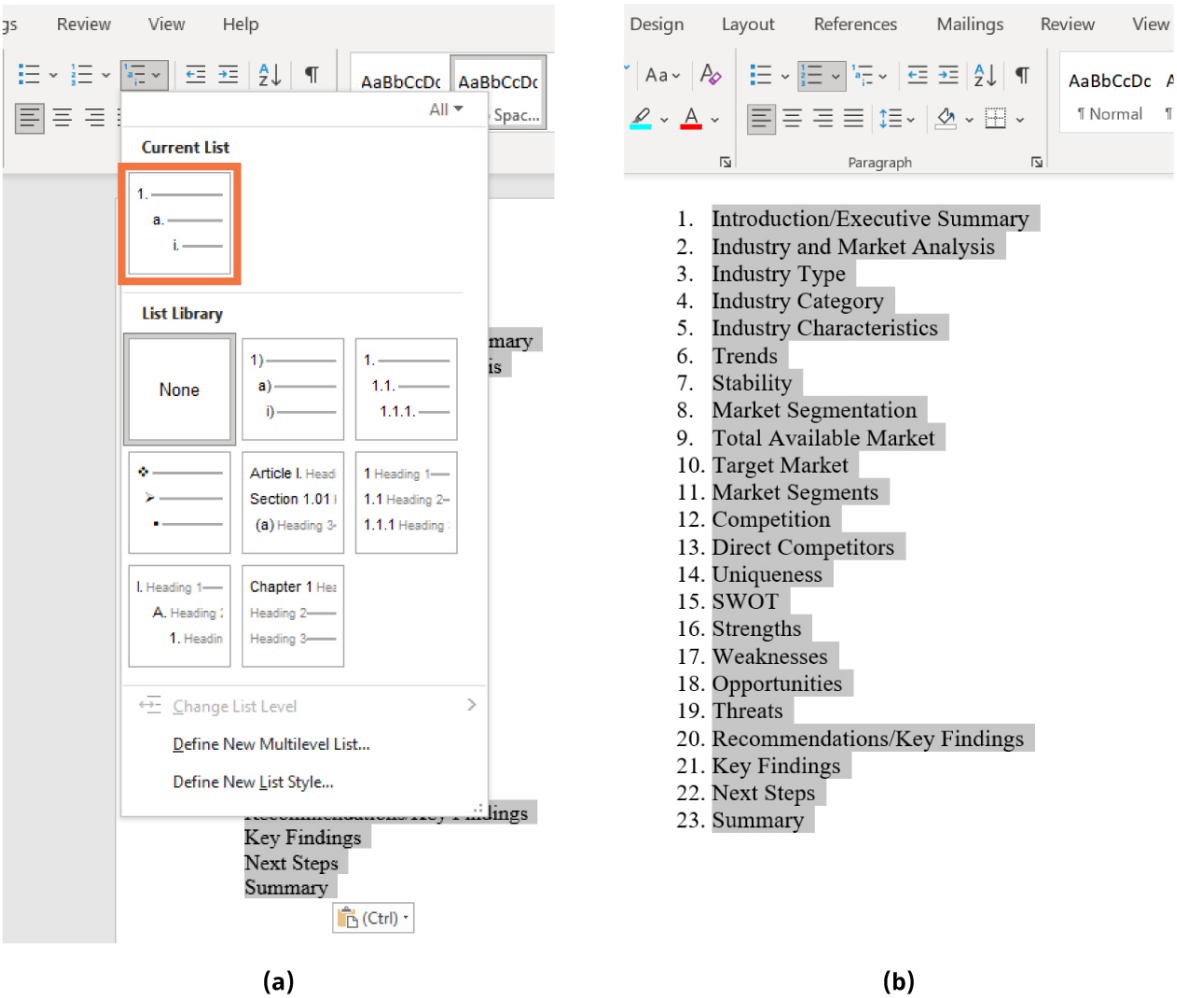
Suppose you need to make an outline of the market trends report using the headings for the sections of the report. Because the report is so long and detailed, it is too complex for a simple numbered or bulleted list; you will need to use a multilevel list. A multilevel list will help indicate different levels of importance and hierarchies within the report. Type the list of headings below into a blank document to start the outline for the market trends report.

> *Introduction/Executive Summary*
>
> *Industry and Market Analysis*
>
> *Industry Type*
>
> *Industry Category*
>
> *Industry Characteristics*
>
> *Trends*
>
> *Stability*
>
> *Market Segmentation*
>
> *Total Available Market*
>
> *Target Market*
>
> *Market Segments*
>
> *Competition*
>
> *Direct Competitors*
>
> *Uniqueness*
>
> *SWOT*
>
> *Strengths*
>
> *Weaknesses*

> *Opportunities*
>
> *Threats*
>
> *Recommendations/Key Findings*
>
> *Key Findings*
>
> *Next Steps*
>
> *Summary*

As they are listed now, there is no indication of what headings go with other headings. It is just a list of words and phrases.

To make this list of headings a multilevel list, first select the whole list with your cursor. Then, choose the Multilevel List drop-down menu from the Paragraph command group on the Home tab. Choose the Current List from the menu. But as you can see in Figure 4.14, you have other options for formatting your multilevel list. You can also define a new list style if you do not want to use any of the available options by choosing Define New List Style. Your list should now be numbered chronologically. You won't see any changes right away, but when you add indents, the different levels in the list will appear.



(a) **(b)**

Figure 4.14: (a) Some of the multilevel list formats include text and symbols. (b) The multilevel lists will appear to be a typical, one-level numbered list until you indent the subheadings. (Used with permission from Microsoft)

You add the indents with the Tab key on your keyboard. You can also add indentations using the Increase Indent tool on the Home tab in the Paragraph command group. Place your cursor at the start of a sentence in the list and press the Tab key or click the Increase Indent button, as shown in Figure 4.15. You can see that once you add the indent, the type of list changes. There are

numbers at the top level, lowercase letters at the middle level, and Roman numerals at the third level. You can change the format of your multilevel list by selecting your list and going back to the Multilevel List drop-down menu. This process can be done with lettered or bulleted lists, too.

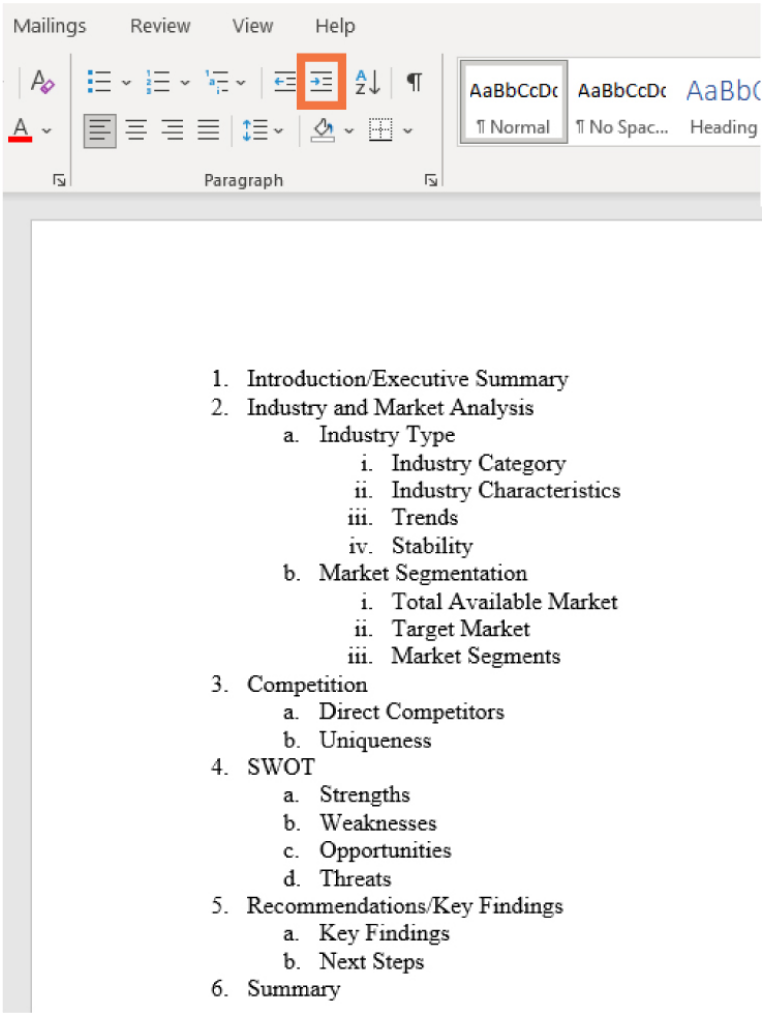


Figure 4.15: More levels can be added to any level of the list by increasing the indent. (Used with permission from Microsoft)

As a final activity for this section, let's add these new subheadings to the market trends report (because it is easier to insert them at the beginning rather than going back later when creating a table of contents). Insert the additional headings not in your current draft into the market trends report. Format the headings as Heading 3 and Heading 4, as you learned in Creating and Working in Documents, based on the outline just created. For example, Industry and Market Analysis is Heading 2, Industry Type would be Heading 3, and Industry Category would be Heading 4. This will help as we build out the rest of the document toward a final draft (Figure 4.16).

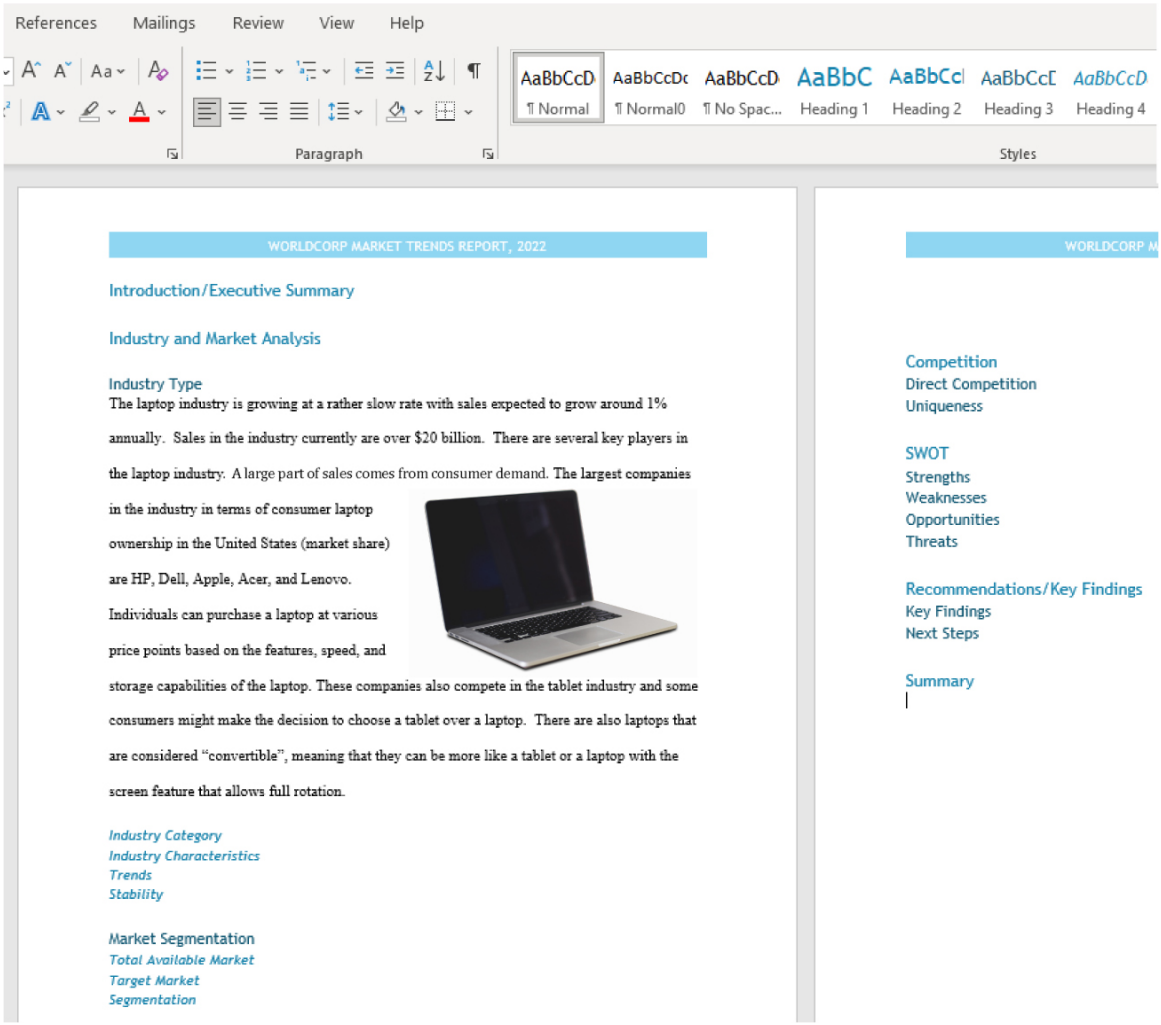


Figure 4.16: Notice the various levels of headings have a slightly different font color and style. (Used with permission from Microsoft)

Link to Learning

As you continue to become familiar with Word and grow more comfortable with its different tools and buttons, you will want to hone your own lifelong learning skills. This textbook covers a great deal of all that is available in Word; however, programs are always changing and being upgraded. Microsoft offers excellent support and tutorials about its various products, and these support pages are invaluable in keeping current with not only Word, but all Microsoft products. Visit Microsoft's support page on the Advanced tab to learn more and become familiar with Microsoft support pages.

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2.1.2: Design and Layout Tab

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Design Tab



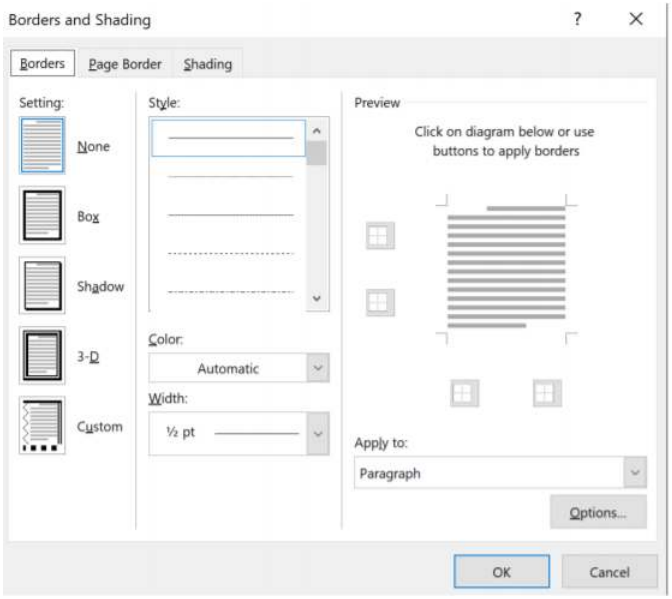
The Design tab allows the user to adjust the organization and visual structure, of the document. The first option to change in the upper left-hand corner of the tab is a Design Theme. Clicking on the Themes icon 

will launch a drop-down box with a large variety of templates for document themes. A document theme is a uniform set of organizational and stylistic structures that provide differentiation between headings and subheadings and provide easy navigation and comprehension for the reader. Just as you could imagine that PowerPoint has a variety of specific themes to choose from to display your slide show, so to can Microsoft Word provide themes. In addition to themes, Microsoft Word has many document style formats that ensure uniform line spacing and document & font organization to the entire document. The colors and fonts buttons/button allow you to apply different colors to the different document styles options, and the Fonts menu applies a unique font to the entire document. Paragraph Spacing, Effects, and Set as Default options 

allow the user to set the default Paragraph Spacing, and default text effects to apply to the entire document and to Microsoft Word when the document is launched.

Finally, the Page Background Group 

Allow the user to create a document Watermark, which is a light color that covers the document (examples include the words Draft, Confidential, or Private. You can also use the drop-down menu that launches when the Watermark icon is selected to customize your Watermark. Page Color changes the background color of the document page (the default background color is white. Finally, Page Borders launches the Border menu for Borders and Shading and this menu has been described previously in detail. In summary, the Borders and shading group determine the shading effect for a page border and the thickness and style of the border. The border settings can apply to a paragraph or the entire document.



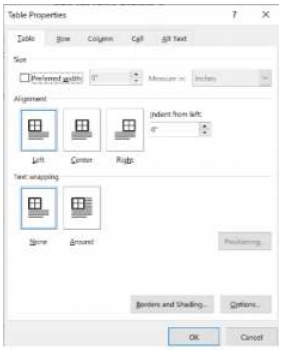
Layout Tab



In contrast to the design tab, the layout tab allows for manipulation of the table itself. The Layout Tab consists of the Table Group, the Draw Group, the Rows & Columns group, the Merge Group, Cell Size, Alignment, and Data Groups.

Table Group

The Select button relates to the specific location of the insertion point in a specific cell in a table. Clicking on the Select icon will display Select Cell, Select Row, Select Column, and Select Table. Select Cells will highlight the specific cell. Select Row will highlight the entire row with the insertion point contained in it. Select Column will select the entire column. Finally, a select table will highlight the entire table. View Gridlines shows are hiding the gridlines of a table. By default, the gridlines are displayed in a table. Sometimes, the user wishes to not display these lines for cosmetic reasons. Finally, Table Properties allow for the manipulation of table formatting, row and column information, and allows the user to enter Alt Text, which allows users with screen readers to view information about the content in the table. Users can also adjust borders and shading and text wrapping in the table, along with preferred width of cells.



Draw Group

The Draw Table group has two options, Draw Table and Eraser. Draw Table allows the user to use the mouse to draw custom table boundaries, including diagonal lines. The Eraser icon allows the user to remove table boundaries and lines to merge cells in order to customize a table.

Rows & Columns Group

The Rows & Columns Group allows the user to insert cell rows or columns above, below, left, or right of the insertion point. Often when designing a table, new information requires a new row or column. Users can also do this by right-clicking on the table, but this can be a solution with more options.

Merge Group

The merge group consists of Merge Cells, Split Cells, and Split Table. If a user highlights information in two adjacent cells, it will merge the information together in one cell that takes up the same area of space. Split Cells does the opposite, it separates one cell into multiple cells. Finally, Split Table allows a new table to be created beginning at the row that is currently the insertion point.

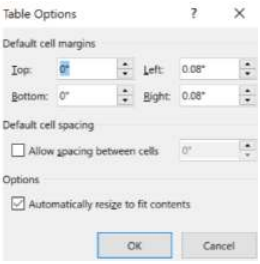
Cell Size

Cell Size determines the length and width of each cell in a table. The first option is the Autofit command. Autofit allows the user to resize the entire table. It provides three options, Autofit Content, Autofit Window, and Fixed Column Width. Autofit Content allows Microsoft Word to automatically size the table to take up as little space on the page as possible. Autofit Window resizes the table based upon the size of the window. Finally, Fixed Column Width allows the user to manually resize the table with the measurements to the right. Distribute Rows & Columns allow for an equal distribution of rows/columns in the table.

Table Alignment



Table Alignment allows the user to orientate the text within each table cell top left centered, centered, top right centered, middle left alignment, middle center, middle right alignment, lower left alignment, lower-middle centered, and lower middle right alignment. The text direction allows the user to change the direction text is displayed. Text can be displayed by default as left to right, but it can also be up to down, right to left, and up to down.



Finally, Cell Margins allows the user to set up margins between cells, and left, right, upper, or lower indentation for text.

Table Data



Table Data allows the user to use some features of Excel in a Microsoft Word table. Information can be sorted. If a table occupies more than one page, selecting Repeat Header Row will display the table header on the next page so the viewer can see the headings. Convert to Text removes all table formatting and automatically places each table row into paragraphs. Users may need to additionally adjust the table to ensure the data displays the way they would like it to after selecting this command. Finally, the formula allows for some features of excel to be used in their table to perform calculations.

References Tab

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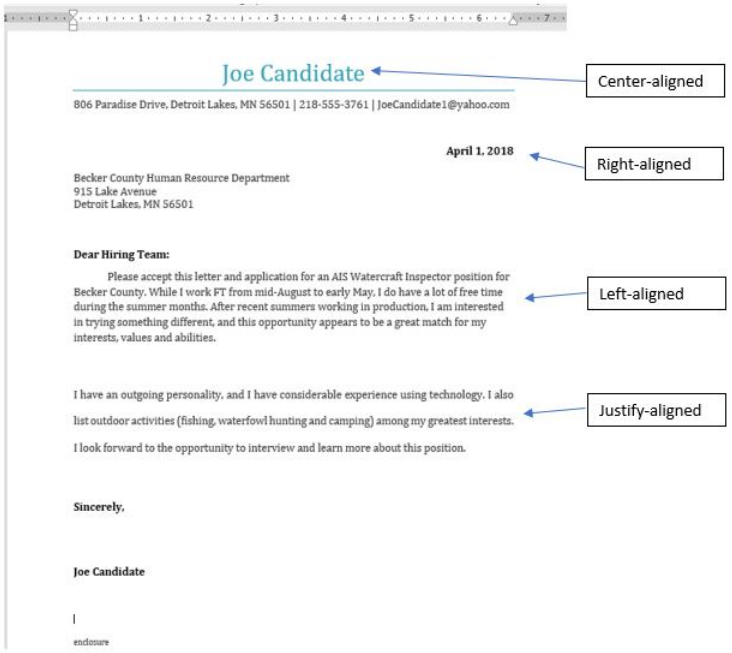
2.1.3: Setting Paragraph Alignment and Hyphenation

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Setting Paragraph Alignment and Hyphenation

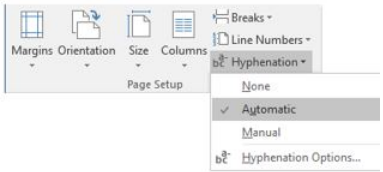
Paragraph alignment determines how the edges of each paragraph aligns with the left and right margins. Alignment settings apply to all text within a paragraph. Remember that a paragraph is created each time the user presses the Enter key. To display the hidden characters, including paragraph marks, press the ¶ symbol in the Paragraph group of the Home tab. Press the button again to hide the formatting marks.

- Left-aligned text is the default paragraph format. The left edge of the paragraph is flush, and the right edge is jagged. This option is typical for letters and reports.
- Centered text is equally distant from the left and right margins. Common uses are titles and headings.
- Right-aligned text is flush with the right edge, and the left edge is jagged. Typical uses are dates or headers and footers.
- Justified-aligned text spreads the text evenly between the left and right margins, leaving both edges flush, unless the final line has limited characters. This option is common for newspaper columns and textbooks.



Paragraph alignments

Hyphenation can improve the overall readability of certain documents. Hyphenation is the process of adding hyphens to words at the beginning of lines so the hyphenated part will fit at the end of the previous line. The hyphens are inserted between syllables in a word. Word can automatically hyphenate your document for you, or you can use the hyphenation tool to manually hyphenate your document.



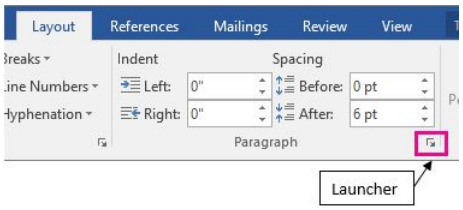
Hyphenation Options

Users can customize their hyphenation settings via the Hyphenation Options dialog window. Use caution when manually inserting hyphens, because the hyphen will always remain even if editing moves the word to the middle of a line, and results in the word no

longer needing hyphenating.

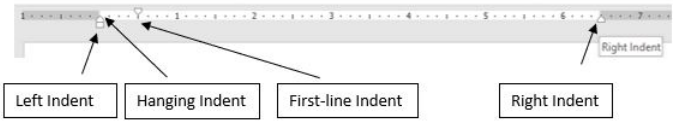
Indenting Paragraphs

Indenting a paragraph results in moving the editable insertion point from the left or right margins. Users can indent the left or right edge of a paragraph, just the first line, or all lines except the first line. Paragraphs are indented relative to the page's margins, and indenting a paragraph doesn't affect the paragraph's alignment. The default indents are 0 inches, meaning that lines of text extend from the left margin to the right margin. Indenting paragraphs can be performed by pressing the Decrease Indent or Increase Indent buttons on the Paragraph tab of the Home tab. Alternatively, to make precise changes to the Left and/or Right Indents or Paragraph Before/After Spacing, utilize the Paragraph group of the Layout tab. Indents are measured in inches and Spacing is measured in point, much like font sizes.



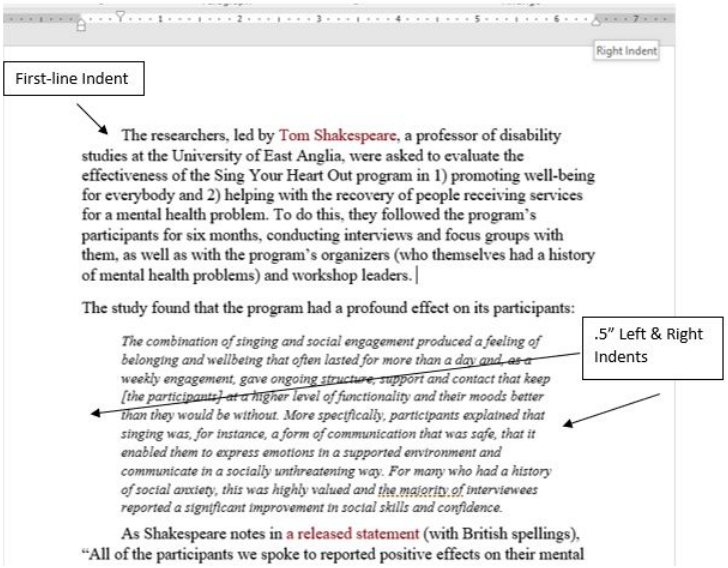
Paragraph Group

A semi-block letter style requires the first line of each paragraph to be indented from the left margin, which is known as a **first-line indent**. Precise indent definitions can be specified in the Paragraph dialog window which can be opened by clicking the **Launcher** button in the Paragraph group. Alternatively, indents can also be set by dragging the markers on the ruler:



Indent ruler markers

A first-line indent requires the user to drag the marker on the ruler to the position where the first line of the paragraph should begin. Typically, this is the .5" mark, which can also be accomplished by pressing the Tab key to indent the first line to the default .5" tab stop. A **hanging indent** occurs when the subsequent lines of a paragraph are indented more than the first. Hanging indents are often used when manually creating citations in a bibliography. To create a hanging indent, drag the marker on the ruler to the right. When citing long quotations in a research paper, users typically use both a left and right indent to offset the quotation, as shown below.



Left and Right Indents example

Setting Tabs and Tab Stops

Tabs allow users to align text vertically at a specific location in a document. A **tab stop** is a point on the horizontal ruler that indicates the location at which to align text. A tab stop is a location where the insertion point will stop when the user presses the 

key. Tab stops can be used to help align text to create columns of data. Custom defined tab stops are displayed on the ruler above the document. A set of default tab stops are located every half inch, but they do not appear on the ruler. When a new tab stop is defined, Word automatically removes the default tab stops to the left. Using tabs, users can align text to the left, right, or center of a tab stop, or text can be aligned at a decimal point. Word stores paragraph formatting, such as tab stops, in the paragraph marks at the end of a paragraph. Therefore, when the user pressing the ENTER key, tab stops are copied to the next paragraph. The same tab stops can then be used in sequential paragraphs to create columns of text. Tabs can be set by clicking on the horizontal ruler, or by using the Tabs dialog window. The following icons represent different tab stops on the horizontal ruler:

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.

Tab stop icons

Each type of tab stop is used in the example shown below. Note the markers on the ruler:

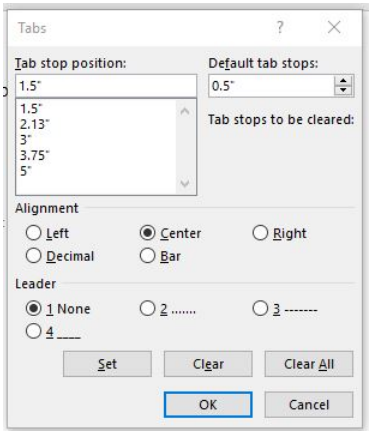


Name	Country	Color	Year	Type	Price
Tahbilk	Australia	Red	2013	Cabernet Sauvignon	$18.99
Ritual	Chile	Red	2015	Pinot Noir	$18.99
Simonnet Febvre	France	White	2015	Chablis	$22.99
Borgo Scopeto	Italy	Red	2014	Chianti	$15.99
Los Dos	Spain	Pink	2017	Rosé	$7.99
Tokara	South Africa	White	2016	Sauvignon Blanc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

Inserted tab stops

The default tab stop is Left, but tab stops can easily be switched by multi-clicking the tab selector on the horizontal ruler. Existing tab stops on the ruler can be dragged to a new position if needed. To remove a tab stop, drag the tab stop off the ruler and release the mouse. The text will realign itself to the existing tab stops. Once the tab stops are in set, newly inserted text will align to the stops when the tab key is pressed. Alternatively, some users prefer to enter text with tabs, but without tab stops, and then apply the tab stops to the existing text.

The Tabs dialog window is useful for adding new, and editing existing tab stops.



Tabs dialog

The window can be opened by double-clicking an existing tab stop or by clicking the Tabs… button in the Paragraph Dialog window, which is opened from the Paragraph Launcher button. The Tabs window is useful for precise position definitions, and it is

the only option for adding Leaders to tab stops. A tab **leader** is a character that is repeated to fill the space spanned by a tab. The dotted leader is very commonly used on menus to make it easier to associate the menu description with its correlating price. The Tabs window is also a convenient way to clear one or all tab stops in a document.

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2.1.4: Headers, Footers, Page Orientation, and Margins

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Inserting Headers and Footers

A header is the area at the top of a page, and a footer is the area at the bottom of a page. Headers and footers consist of one or more lines of text, page numbers, graphics, and other fields, such as the file name, document title, current date and/or time, or author's name. To create a header or footer, click either the Header or Footer drop down list from the Insert ribbon.

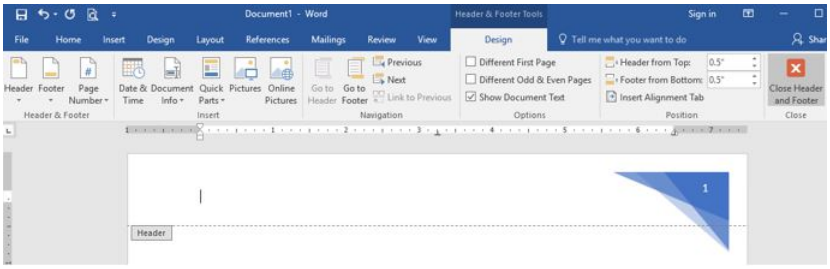


Header gallery

A gallery of built-in designs is displayed. Clicking a built-in design makes the header or footer the active area of the document, while the body of the document fades to the background. A header or footer has three sections: left, center, and right. The user can either type text into existing placeholders, or insert fields from the Header & Footer Tools Design contextual tab, which only appears when the cursor is placed in either the header or footer.

To return to the body of the document, double-click in the document body, or click the Close Header and Footer button on the Header & Footer Tools Design tab. Double-click in the header or footer area to make it active and allow for editing.

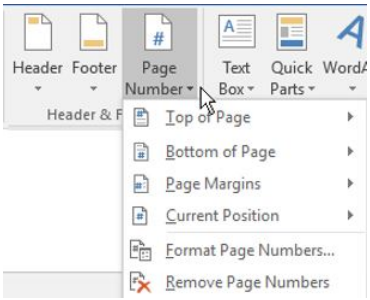
The header or footer is printed on each page of the document. To specify a different header and footers for the first page, select the Different First Page checkbox on the Options group of the Header & Footer Tools



Header Footer Tools tab

Design tab. Any existing header or footer will automatically be removed. A different first page is common in long documents to prevent the cover page from including the headers and footers contained in the rest of the document. A cover page usually does not include any header or footer data.

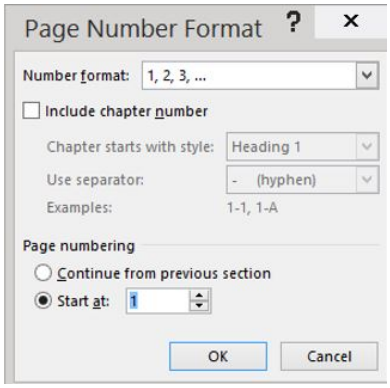
One of the most common purposes of headers and footers is to include page numbers.



Insert Page Numbers

Page numbers are helpful in documents that have more than one page. To add a page number at the current location in an existing header or footer, click Page Number > Current Position, and then choose a style from the gallery of choices. Scroll through the list of style options in the gallery to find one you like. You can select a plain number style, or a **Page X of Y** style to get a more defined starting and ending number (**Page 1 of 7**) format. Experiment to find the style that best meets your needs.

An inserted page number can be further formatted as needed. Number formatting and different starting page numbers can be defined in the Page Number Format dialog window, which is opened when the user selects Format Page Numbers…. from the Page Number drop down list. Number formats include Arabic, alphabet, and roman numeral formats.



Page Number format

The Page numbering options allow a user to restarting the page numbers at a user-defined number. This can be useful to recognize unnumbered pages that precede the main part of the document.

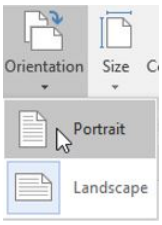
In the Position group, you can control the amount of space allotted to the header and footer. By default, each is 1/2-inch tall. Users can change these values in the Header from Top and Footer from Bottom list boxes. Manipulating these selections will affect the printable area of the document's margins.

It is a "best practice" to add page numbers before adding other header and footer fields, because any existing text will be replaced by adding page numbers using the Insert > Page Number process. Alternatively, users can add page numbering to existing header and footer text through the Quick Parts feature, which is not explained in this text. Other than page numbers, headers and footers often contain the document's author, date and/or title. Each of these fields help identify the document, particularly when the document is printed and compared with other similar documents.

Setting Page Orientation and Margins

The page setup of a document includes settings such as margins, orientation, and other pagination settings. These settings can be applied to the entire document, or specific sections, which can be created by inserting section breaks (not explained in this text). The Page Setup group found under the Layout tab contains these selections.

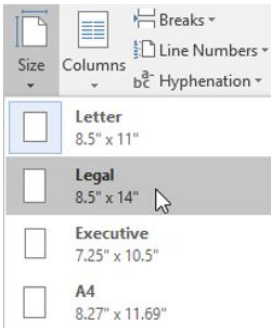
Page **orientation** refers to how a rectangular page is arranged for viewing.



Orientation

The orientation of a Word document can be either portrait or landscape. Portrait orientation is taller than it is wide (vertically), and landscape orientation is wider than it is tall (horizontally). The default orientation is portrait.

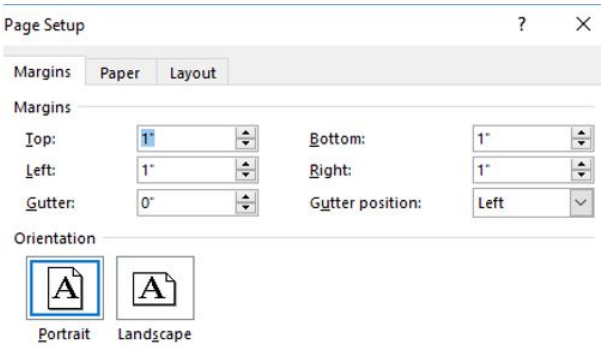
Choosing a page orientation needs to consider the paper size selected for the document. The standard paper size in North America is called Letter, which has the dimensions of 8.5” x 11”. Legal documents are 14” instead of 11”, which means when printed in portrait orientation, legal documents are three inches longer (and a pain to fit in a standard folder!). The standard paper size in Europe is known as A4. Its dimensions are 210mm x 297mm, which is closer to the Legal size, than the Letter size.



Paper size

Many posters and tables are often printed on Tabloid sized paper, which is 11” x 17”. However, since a lot of home printers cannot accommodate this size of paper, many users choose to change their orientation to landscape, which changes the printable width to 11”, and the printable height to 8.5”. If adjusting the orientation doesn’t solve the layout challenges of the document, consider adjusting the margins!

Margins are the white space surrounding the text on a page. Margins can be specified for the top, bottom, left and right edges of a document. The default margins are 1” each, but margins can easily be adjusted from the pre-set choices in the Margins drop-down list, or by manually adjustments in the Page Setup window, which can be opened by clicking the launcher button in the Page Setup group in the Layout tab. Narrow margins leave more room for more data, while wider margins decrease the amount of printable space. Similarly, larger top and bottom margins decrease the available space. If adjusting orientation and margins aren’t enough to resolve page formatting, consider using page breaks.



Page Setup window

Pagination is how a document is divided into pages. Word automatically determines how much text will fit on a page based on the amount of text and the document formatting. As new data is added to a page, Word creates automatic page breaks, also known as

soft page breaks. To force data to a new page, a user can insert a manual (hard) page break. Inserting a **page break** moves the text after the insertion point to the next page. To insert a page break, press Ctrl + Enter or click Page Break from the Insert tab. To remove manual page breaks, utilize the Show/Hide button to display formatting marks, such as the Page Break mark:



Page Break

To remove a hard page break, place the insertion point to the left of the page break and press the Delete key. Word will re-paginate itself, and move data to the previous page.

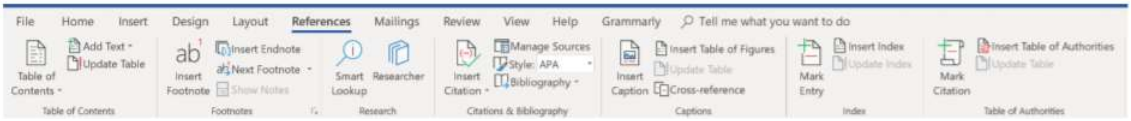
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2.1.5: Using the Reference Tab for Citations and Bibliographies

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Reference Tab



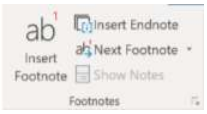
The References Tab is used to provide a hub to use citations, footnotes, endnotes, tables of contents. bibliographies, and any other type of references in a document. Often users will use the references tab when writing a research paper or a long document with many chapters.

Table of Contents Group

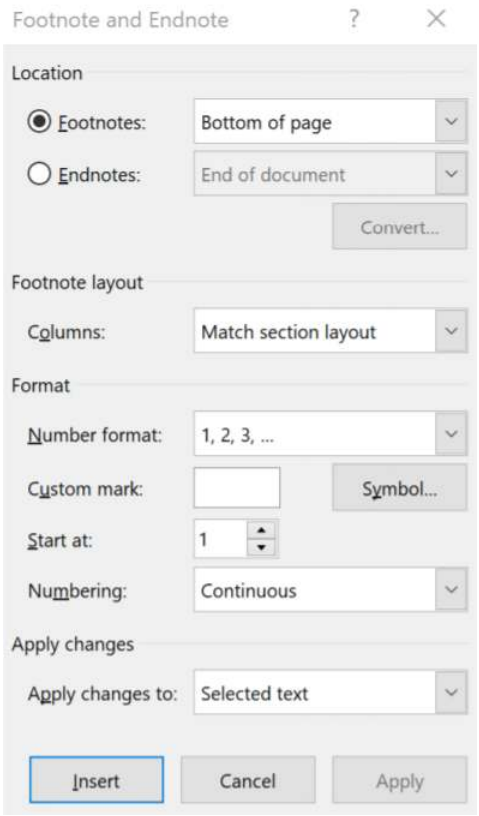


The Table of Contents Group requires the use of Headings, which were previously described. Using the headings, a Table of Contents is created and automatically connects the headings and subheadings with the appropriate page number. Every time the document is substantial, the user should click on the “Update Table” button, which will allow the user to choose between updating the entire table (to include new headings & subheadings), or simply to update the page number. When clicking on the Table of Contents icon, there are a variety of different styles to choose from.

Footnotes Group



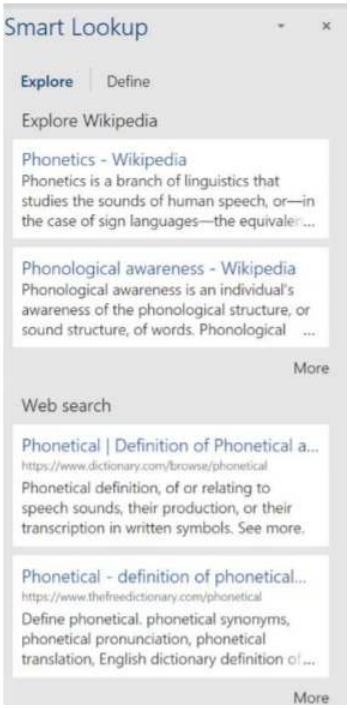
Footnotes are additional information that the writer may place at the bottom of the specific page. Usually, footnotes are not required information for the reader to understand but allow for a “deeper dive” into the material if desired. Footnotes are numbered. The first footnote is given a [1] at after a specific word, the next footnote on the page is given a [2]. Compared to a footnote, an endnote is placed at the end of a document section, or end of the document if the document has only one sentence. The *Next Footnote* command allows the user to quickly move around in their document between footnotes or endnotes. The *Show Notes* icon displays to the user where the Footnotes or endnotes are located. Finally, there is a more settings box Which allows for additional customization of footnotes and endnotes. When selected, a new window will launch allowing customization of where footnotes and endnotes appear, and the numbering and location of footnotes and endnotes on a page along with how they are displayed and referenced.



Research Group



The Research Group was added in 2016 to Microsoft Word. The Smart Lookup icon allows a word used in the document to be searched online for definitions, web-related information, and phonetical spelling. For example, highlighting the word “phonetical” and selecting *Smart Lookup* provides the user with this information: using the lookup feature.

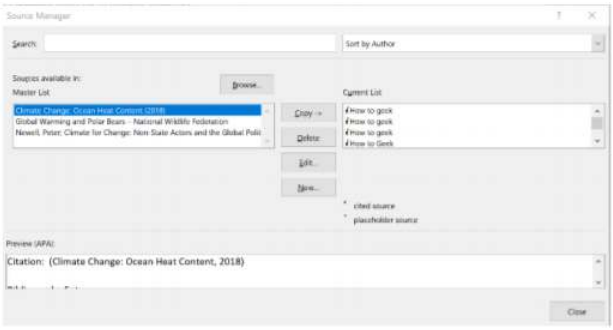


The Researcher icon allows the user to quickly search the web for accurate sources of information and insert them into the document and include them inside the bibliography. This is particularly helpful to a student writing a research paper as scholarly journals are made easily available for searching and citations can be quickly added to the document.

Citations & Bibliography



Group Citations tell the reader where a document was retrieved and how it was used. Selecting the *Insert Citation* field launches a drop-down dialogue box allowing the user to add a new source, add a new placeholder (if you want to insert the source later), and insert a citation you have already used. *Manage Sources* launches a new Source Manager window to allow the user to edit existing sources to make changes to the Citation or remove citations not needed in the document.



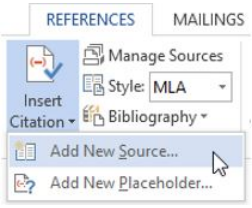
Users can also change the citation style between APA (default) to other citation standards as required, and finally, inserting a bibliography with the theme of their choice. Usually, Bibliographies should be placed at the end of the document.

Creating and Inserting Citations and Bibliographies

Many college courses require students to write research papers. While conducting the appropriate research may be the main objective of the assignment, collecting the research is often not as challenging as documenting the sources of the research. Part of the challenge associated with properly documented sources is understanding the format of the required style guide assigned by the

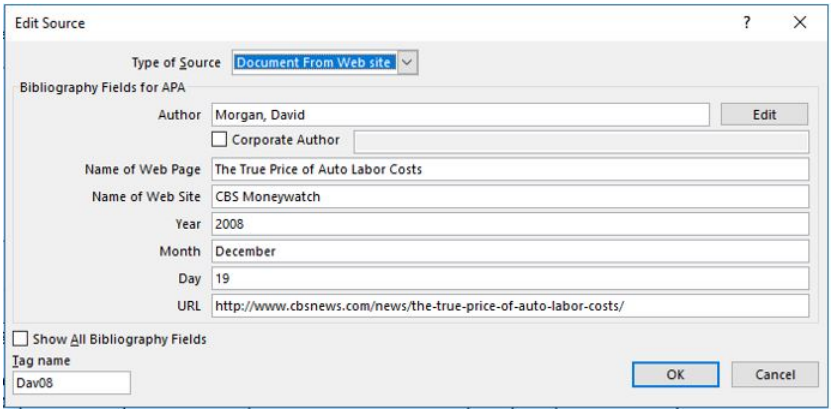
instructor. A style guide is a set of standards for creating documents, and citing of sources. A **citation,** or a **reference,** is a formal acknowledgement to a published or unpublished source. The purpose of using citations is to give credit to the author of the original research, and avoid plagiarism. **Plagiarism** occurs when a user presents the data of another author as if it were their own. The major writing style guides include MLA, APA, CSE, and Chicago. Each style has unique requirements for handling citations.

A typical requirement of a research paper is the production of a bibliography, a Works Cited or References page. A **bibliography** is an alphabetic list of the sources used to produce a scholarly work. Each style guide has different requirements for what data is needed to be listed for each source. The bibliography helps the reader identify the source of the writer's research. Manually creating a bibliography can be a tedious and inexact process, and updating a manually-generated bibliography will likely induce heartburn. However, by carefully entering sources into Word, a bibliography can be accurately generated and re-generated with ease.



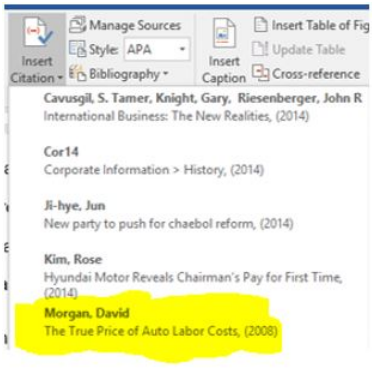
Insert Citations

Before a user can create a bibliography, they must create at least one citation and source in the document. Whenever a source is referenced in a document, the user should create a citation to give the original author credit. To add a citation, place the cursor in the desired location (follow the style guide), and click Insert Citation from the References tab, then choose Add New Source…



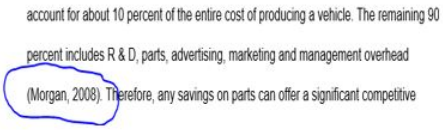
Edit Source

The Create/Edit Source dialog window will appear where the user can enter as much information regarding the source as possible.



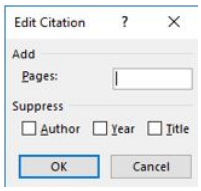
Citations

The first field, Type of Source, will dictate which bibliography fields are needed for the source depending on the specific style guide. After entering the publication details, and clicking OK, the citation will appear in the document, and the source will be saved.



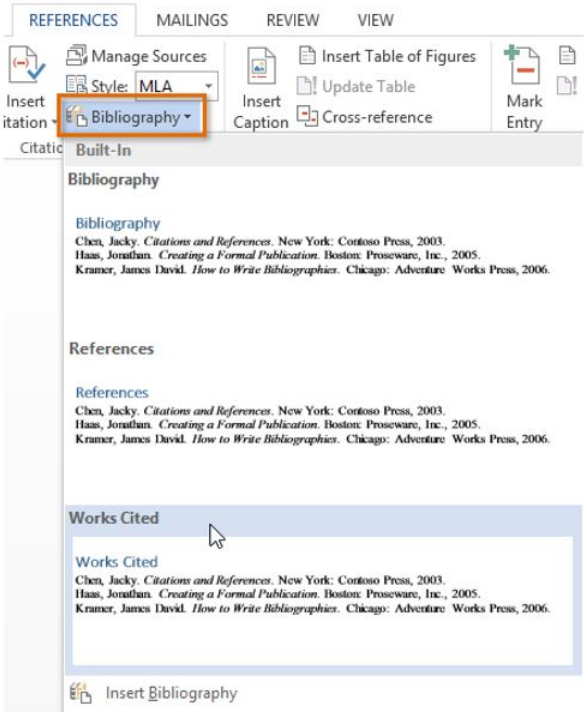
Inserted citation

Types of sources can include books, a web site, an article in a periodical, a sound recording, and many more. Often, a single source can be cited numerous times in a report. Users can easily add the citation again by clicking the Insert Citation drop down button from the References tab, and selecting the source from the drop-down menu. A citation can be edited to add page numbers. Open the citation's inline drop-down menu and choose Edit Source. Certain fields can even be suppressed.



Edit Citation

After completing the paper, adding all the sources for the document, and completing the summary, adding the bibliography or works cited is extremely easy! Typically, a bibliography will reside on its own page. Therefore, create a manual page break, and then on the References tab, in the Citations & Bibliography group, choose the Bibliography option and choose from the pre-designed formats to insert the Bibliography or Works Cited into the document.



Built-in Bibliography

The bibliography appears and the sources are formatted to match the selected style guide. If the user ends up adding more sources to the document, they can easily update the bibliography by clicking it and selecting Update Citations and Bibliography.

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2.1.6: Working with Graphics and Text Tools in Microsoft Word

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Learning Objectives

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

- Insert and modify a table
- Use tools in the Illustrations command group to enhance documents' visual appeal
- Use the Text command group to enhance and format documents
- Use the Symbols command group to insert special characters and equations

The WorldCorp market trends report will include more than just text. It will incorporate graphics and images to visually convey the information in the report. Some of these graphics are needed to show the relationship between product lines and distribution centers. Other graphics are used to visually summarize information. In this section, you will learn about the tools for creating engaging, professional graphics within Word.

Tables

Tables are a critical feature of many business documents. They are typically the most popular way of presenting results and/or data. They are particularly useful for presenting simple data with only one or two variables. You can easily glance at a table to see, for example, how many sales were made in a given month by a given group of salespeople. In other words, tables are a good way of presenting a limited amount of information in an easy-to-read format. Keep in mind that they are not best suited for complex data or information sets with multiple variables, as the tables can quickly become overloaded with information and hard to read.

You need to create a table to summarize WorldCorp sales information for the market trends report. The following columns will be needed: Product, Quantity, Price, Revenue. This information will be arranged in four rows to represent the four different product lines. (Remember that rows are represented horizontally from left to right, and columns vertically from top to bottom.) To insert a table, go to the Table drop-down menu on the Insert tab and select the number of rows and columns you want for the table by hovering over the squares (see Figure 4.17). For this example, you need four columns and five rows (the products plus the column heading row). You can add more rows or columns after the table is created if needed.

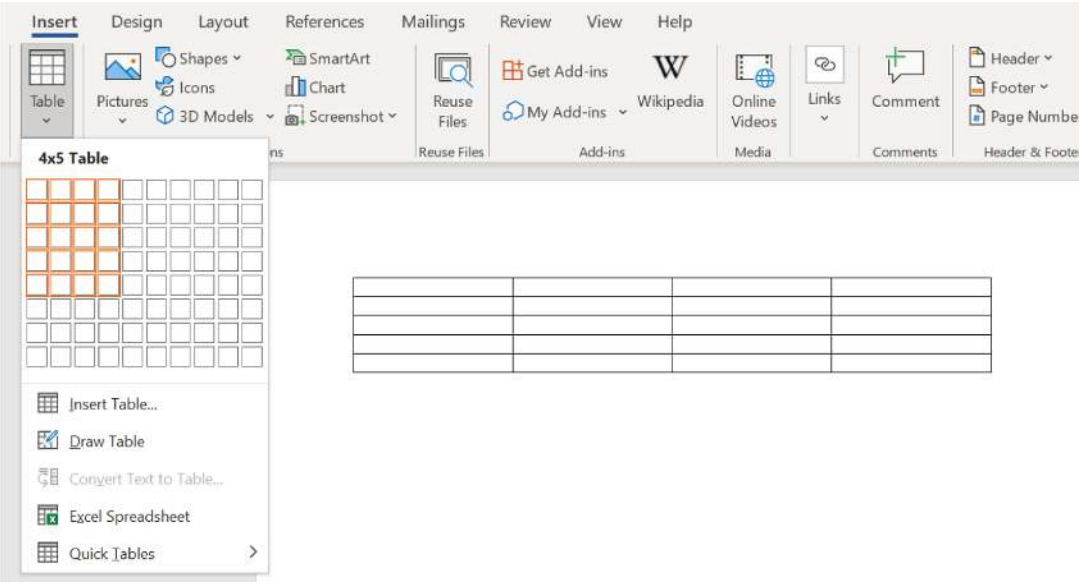


Figure 4.17: The Table tool provides an easy-to-use visual guide for creating tables. (Used with permission from Microsoft)

When you insert the table, the ribbon changes, giving you two additional tabs for changing the formatting and layout of the table. In Figure 4.18 you can see two new tabs: Table Design and Layout tab. These tabs open automatically when a table is inserted into the document. You can modify the table as a whole by selecting one of the Table Styles in the new Design tab. Select the whole table, then Table Styles, and then choose style; we have chosen one with alternating white and blue rows. You can now add the desired text to the table with the new table style.

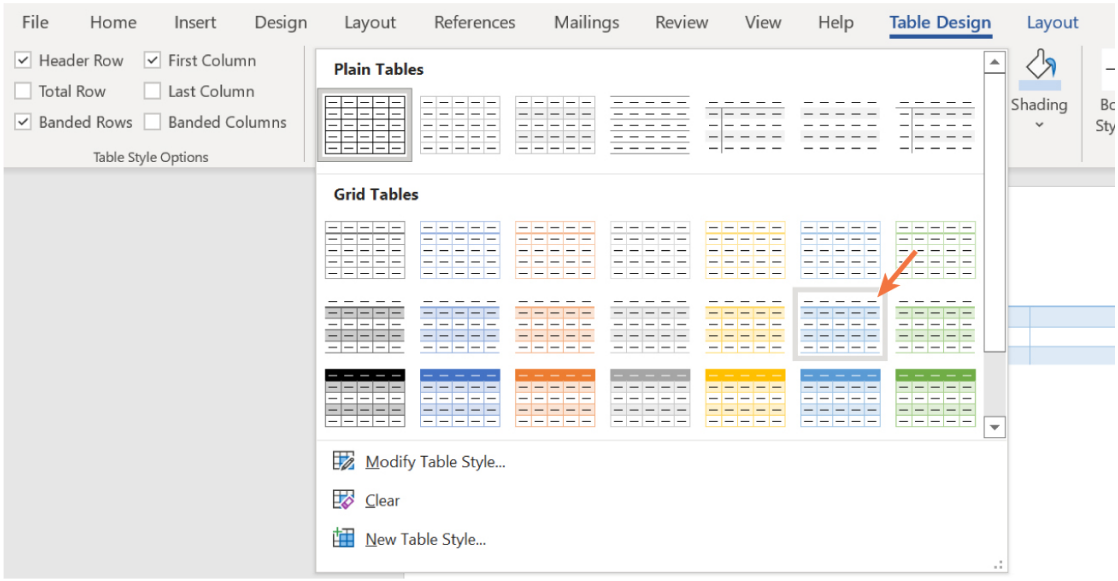


Figure 4.18: With the built-in styles, you can customize the table for a more visually appealing look. (Used with permission from Microsoft)

To add new rows or columns to your table, go to the other new tab, Layout. There are options for adding rows and columns above and below, or to the right and left, of the one you currently have your cursor on. This makes it easy to expand your table as you add more information. Select the area in the table you want to expand such as the column or row. Then, choose the applicable tool from the Layout menu. In this example, we chose Insert Below and Insert Right. In Figure 4.19, you can see an added row to the bottom of the table, and a new column named YoY Same Month. ("YoY" stands for "Year over Year.")

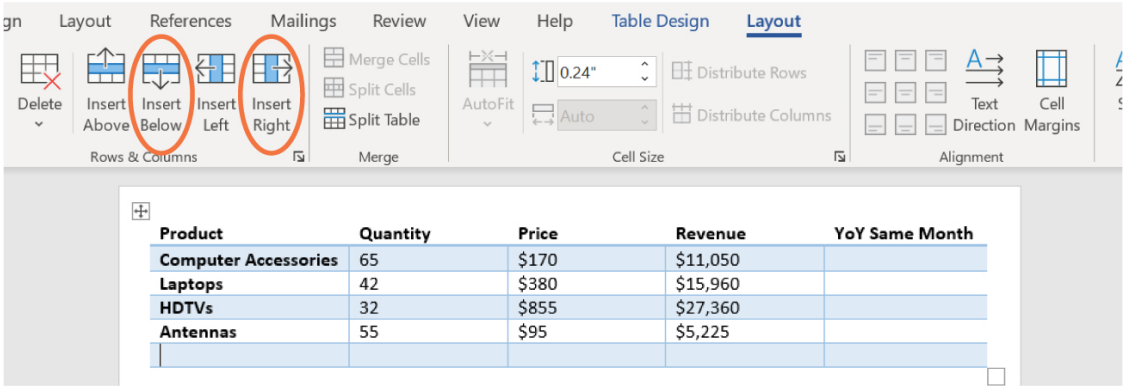


Figure 4.19: The Layout tab tools are used to make physical adjustments to the table, such as inserting or deleting rows or columns. (Used with permission from Microsoft)

Illustrations Command Group

The Illustrations command group is for inserting images, shapes, SmartArt, or charts. For the market trends report, you will be inserting some graphs and charts that show the size of the market and other related information. You might also want to include images of new developments in the industry or current products on the market from competitors. The Creating and Working in Documents chapter covered the arrangement and aligning of objects. This section will cover how to insert different types of objects.

Inserting Pictures

When inserting a picture into your document, you can choose to get a picture from the internet, from stock images in Office, or from a picture saved on your computer. (Always make sure you are not violating copyright or using pictures from proprietary sites without giving proper credit to the image creator or site.) In a business report, you might want to include images of your products or your office building. These photos will probably already be saved on your computer or be available on your shared company hard drive. To add a picture from a file saved on your computer, go to the Insert tab, choose Pictures, then select This Device from the drop-down menu (Figure 4.20). From the dialog box, choose the picture file you want to insert. The picture will be inserted at the location of your cursor.

You may also choose to insert some stock images available through Office. Stock images are photos or other images that are already licensed for general use through whatever platform you are using. There are stock image repositories, such as Getty; Office has its own repository of stock images, which you can access by selecting Stock Images from the Pictures drop-down menu. These images are searchable and include photos, icons, and cartoons.

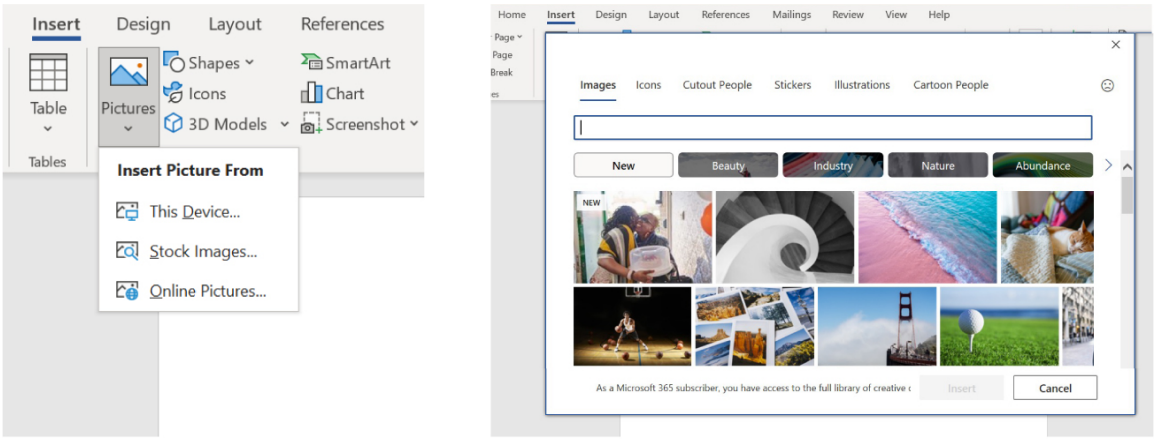


Figure 4.20: (a) Word makes it easy for you to insert images from a variety of locations into their document. (b) The Office stock images give you different options for more generic images or cartoons. (Used with permission from Microsoft)

Word also gives you the option of inserting a picture directly from the internet. If you choose Online Pictures, a dialog box will open, with Microsoft Bing's image search available, as Figure 4.21 shows. This might be a nice option if you want to include a picture of a competitor's product in the market trends report.

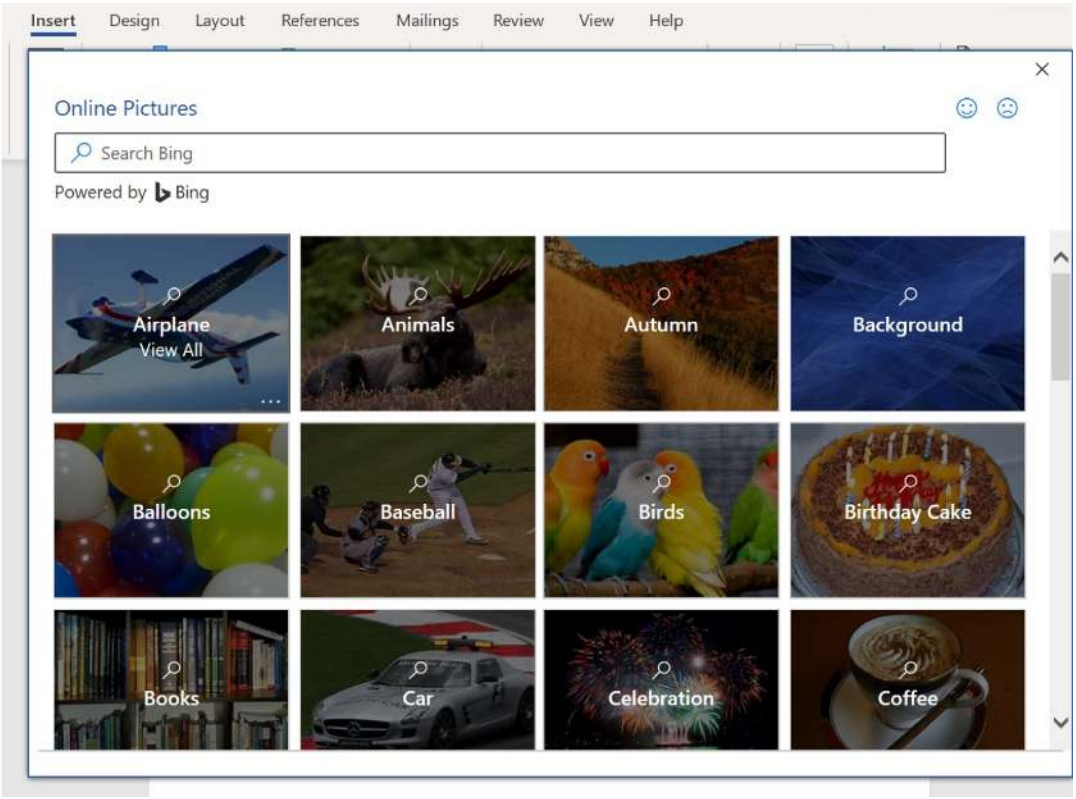
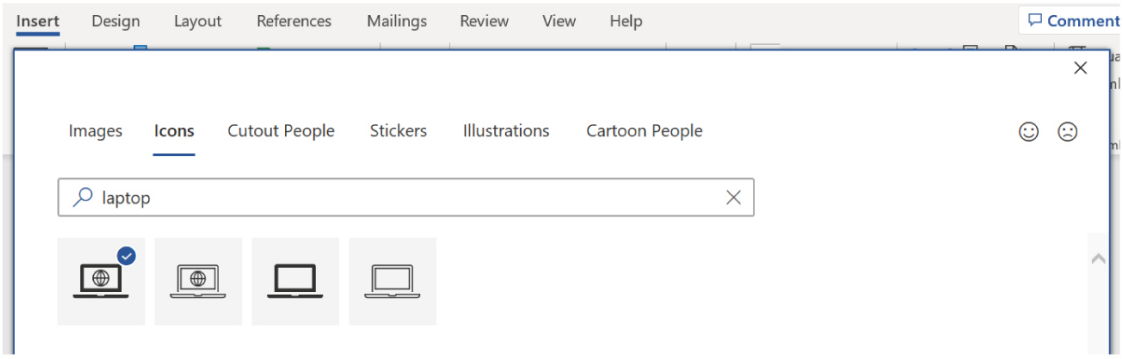


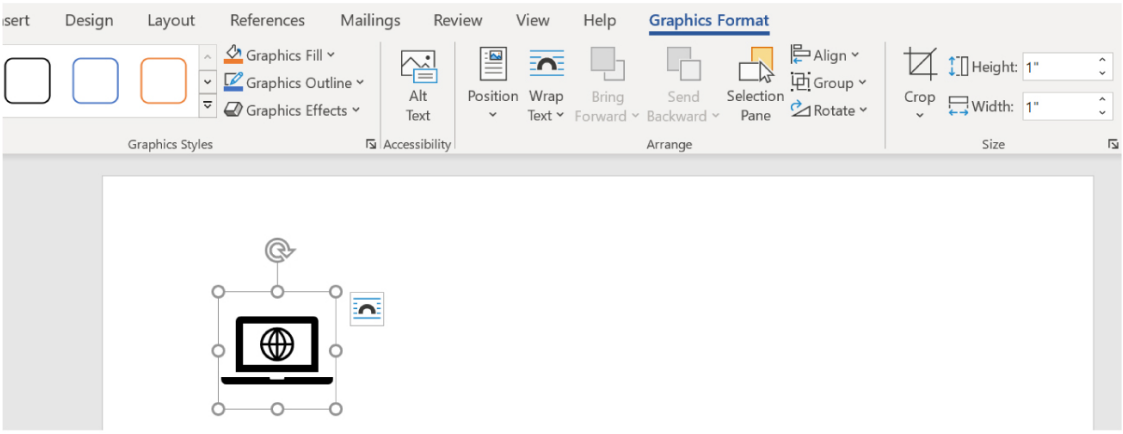
Figure 4.21: Bing's image search tool helps you look for images by categorizing them by topic. (Used with permission from Microsoft)

Let's find images of laptops for the WorldCorp market trends report. Let's include one stock image and one online picture. For now, insert the images in a blank document just for practice. Later, you can insert the images into the market trends report if you desire. Open a blank document and go to the Insert tab.

Choose Picture and then choose Stock Images. Choose the Icons tab and, in the search bar, type "laptop" (Figure 4.22). This will narrow our search to icons, or simple black-and-white illustrations, rather than photographs. This type of image might be useful in a report because it is clear and simple. Notice that when an icon is inserted into the document, a new tab, Graphics Format, appears on the ribbon. The Graphics Format tab will appear when you insert something like an icon or a cartoon into your document. This tab gives you the tools to make adjustments to the icon that you inserted.



(a)



(b)

Figure 4.22: (a) Word gives you different categories to help you narrow down your search. (b) The Graphics Format tab offers tools for applying different styles, effects, and other features to your image. (Used with permission from Microsoft)

Now, let's find a picture of a laptop from the internet. Choose Online Pictures and type "laptop" in the search bar. This will initiate a Bing web search for that key term. Notice that you can also search by license; here, we have chosen to search for images under the Creative Commons license only. To select an image, click on the picture and choose Insert (Figure 4.23).

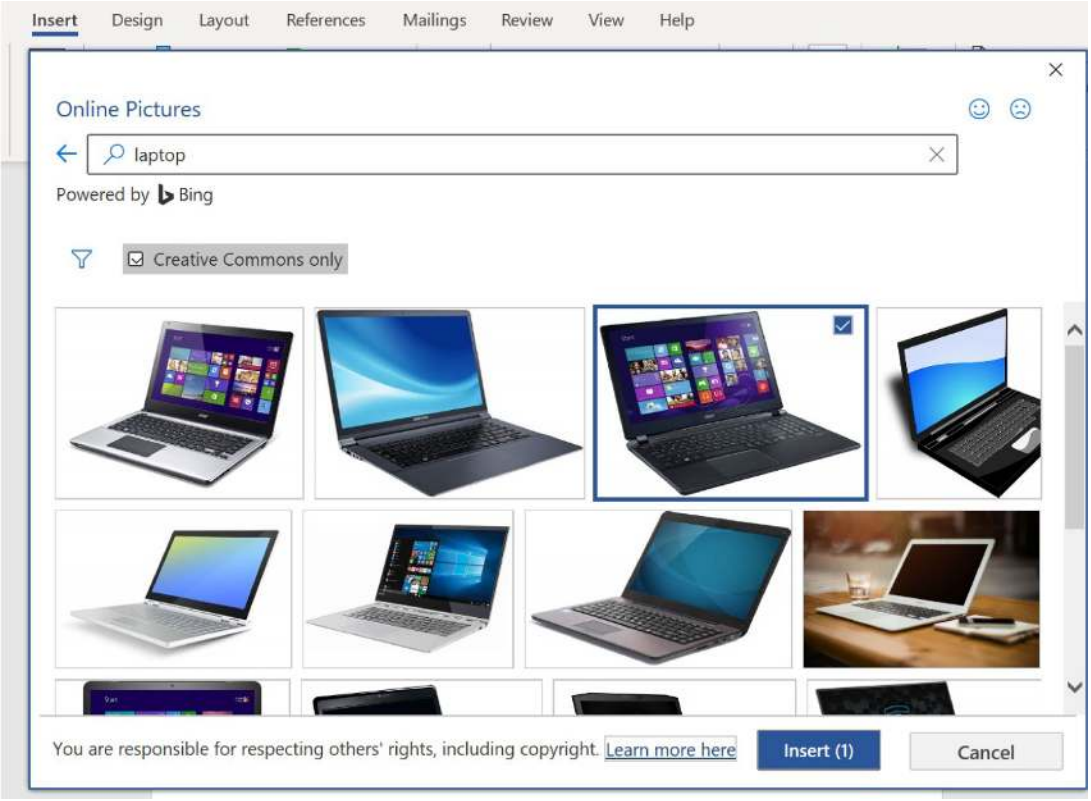


Figure 4.23: Bing is the search engine used for images because it is also a Microsoft product. (Used with permission from Microsoft)

In this case, because you are inserting an actual full-color image, such as a photograph, the tab added to the ribbon is the Picture Format tab, not the Graphics Format tab. As with the Graphics Format tab, this tab gives you the tools to make adjustments to the picture and its placement in the document, as Figure 4.24 shows.

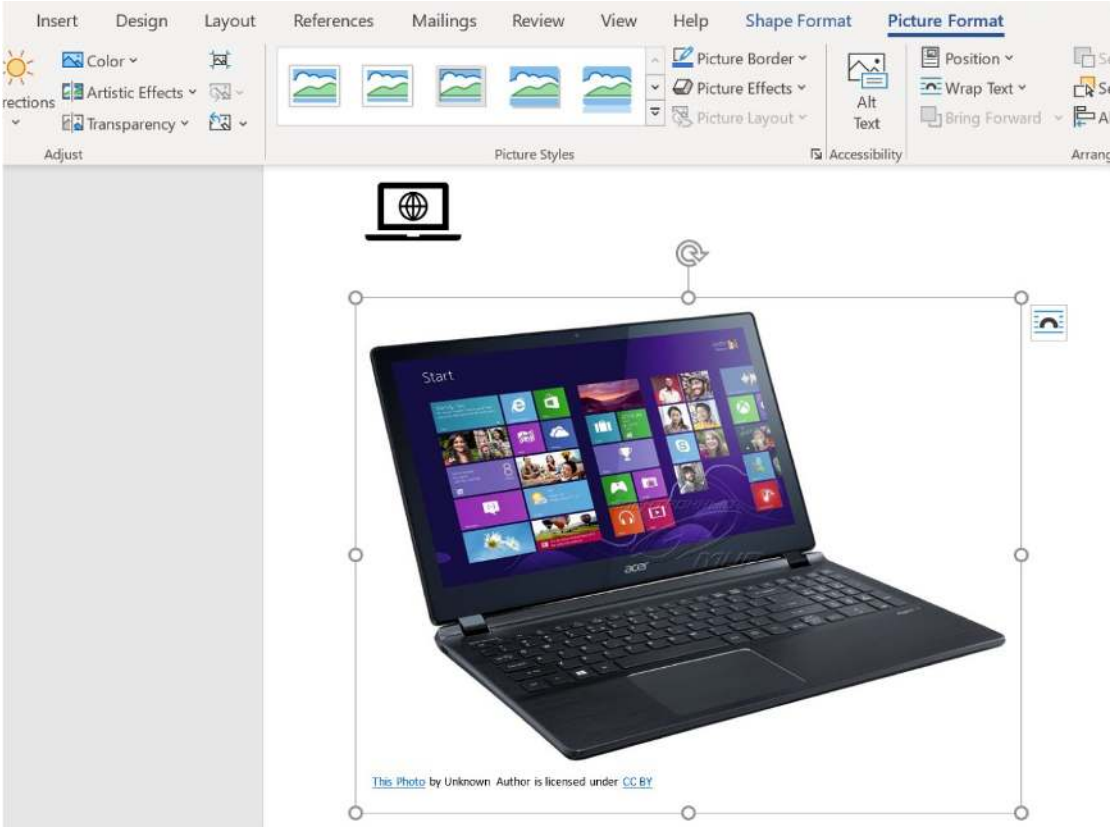


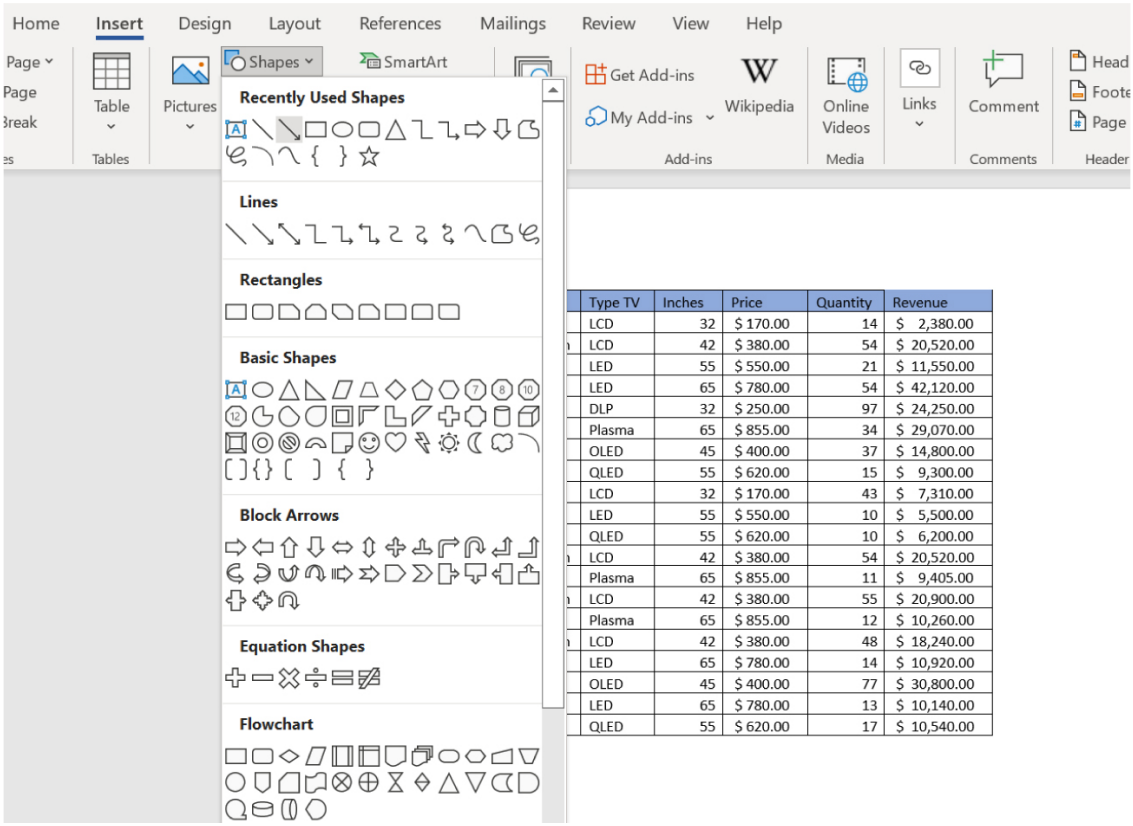
Figure 4.24: When images are used from the web, be sure to recognize copyrights and give credit for images when appropriate. Although this image is a stock photo with an unknown author, other photos you may use will show the author's name and the photo's license in the copyright line that Bing automatically generates. (Used with permission from Microsoft)

Shapes

The Shapes drop-down menu is a useful command if you are designing an ad, flyer, newsletter, or other graphic-heavy document. Shapes are graphical symbols, like arrows, rectangles, circles, and lines, that can be formatted in different ways. These can be useful in business documents because they can help call attention to certain topics or data without being as eye-catching as a photograph. For example, you might want to insert an arrow shape in the market trends report to draw attention to a specific item in a graph or chart. Or you might want to use a circle to outline a key part of a table. However, keep in mind the professionalism and visual appeal of the document you are preparing. Shapes might not be appropriate in all situations.

In Figure 4.25, you can see the wide range of shapes that you can add to your document. Let’s add an arrow to a table that we might use in the market trends report to highlight an important number in the table. This table contains television sales data for WorldCorp. We will revisit some of this data as we move through the spreadsheet chapters.

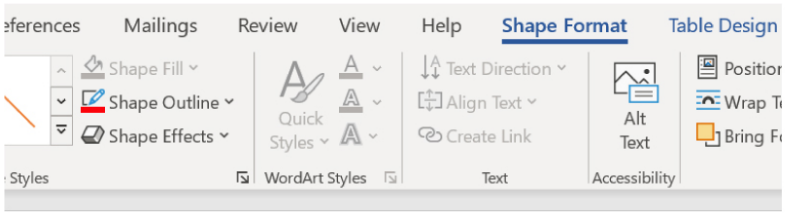
We want to point out the highest quantity sold in the table. To insert an arrow, go to the Insert tab, Illustrations command group, and select Shapes. Select the arrow you want to insert. In this example, the single line arrow (third over from the left) is selected, as shown in the figure. When you select the shape, you will get a black “+” as the cursor. Use that plus sign to insert the shape and to size the shape as you choose.



Type TV	Inches	Price	Quantity	Revenue
LCD	32	$ 170.00	14	$ 2,380.00
LCD	42	$ 380.00	54	$ 20,520.00
LED	55	$ 550.00	21	$ 11,550.00
LED	65	$ 780.00	54	$ 42,120.00
DLP	32	$ 250.00	97	$ 24,250.00
Plasma	65	$ 855.00	34	$ 29,070.00
OLED	45	$ 400.00	37	$ 14,800.00
QLED	55	$ 620.00	15	$ 9,300.00
LCD	32	$ 170.00	43	$ 7,310.00
LED	55	$ 550.00	10	$ 5,500.00
QLED	55	$ 620.00	10	$ 6,200.00
LCD	42	$ 380.00	54	$ 20,520.00
Plasma	65	$ 855.00	11	$ 9,405.00
LCD	42	$ 380.00	55	$ 20,900.00
Plasma	65	$ 855.00	12	$ 10,260.00
LCD	42	$ 380.00	48	$ 18,240.00
LED	65	$ 780.00	14	$ 10,920.00
OLED	45	$ 400.00	77	$ 30,800.00
LED	65	$ 780.00	13	$ 10,140.00
QLED	55	$ 620.00	17	$ 10,540.00

Figure 4.25: There are many shapes for adding emphasis and visual appeal to your documents. (Used with permission from Microsoft)

After you select and insert a shape, the Shape Format tab is added to the ribbon, as shown in Figure 4.26. You can change the color of the shape, add visual effects, align the object, use a word wrap, and change the position of the item.



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 4.26: The Shape Format tab is used to change the color, size, and other features of the shape. (Used with permission from Microsoft)

SmartArt

SmartArt is a tool in Word that lets the user design organizational charts or flowcharts. It is also part of the Illustrations command group. It is similar to Shapes, but has the shapes prearranged in useful graphic formats, such as flowcharts. In Figure 4.27, you can see the different organizational graphs and charts available. This section covers three important types of SmartArt: Lists, Process Charts, and Hierarchy Charts.

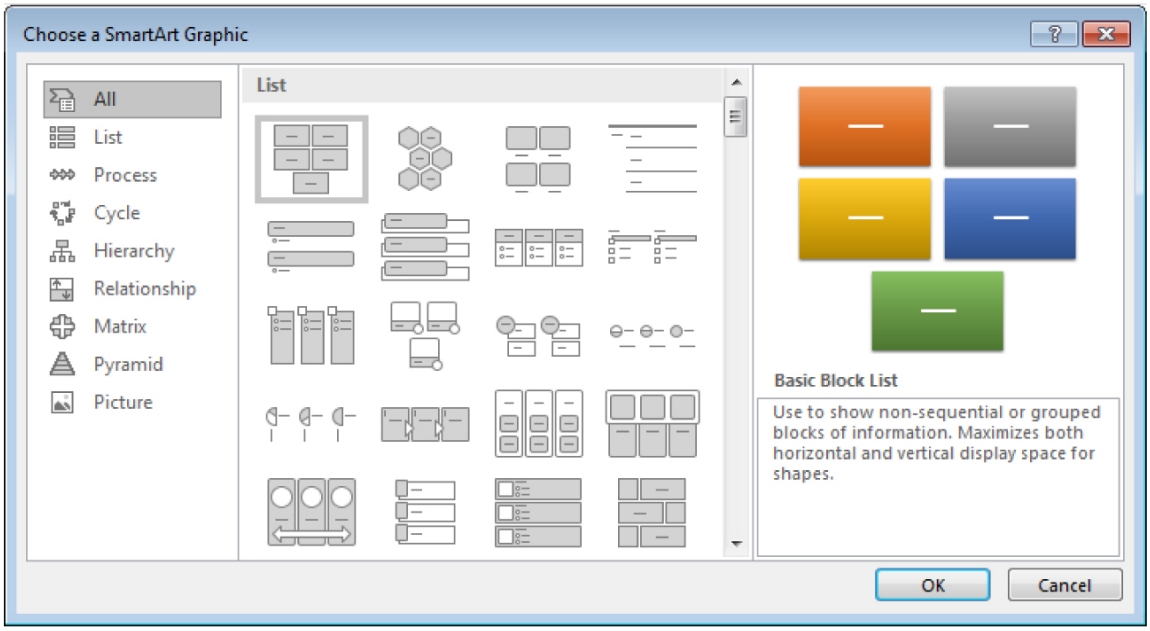


Figure 4.27: There are various business charts that you can design in SmartArt. (Used with permission from Microsoft)

SmartArt Lists

Microsoft Word: Advanced Formatting Features covered basic numbered and bulleted lists. But there are other, more visually complex options in SmartArt that an employee might have to use when creating documents that contain deeper levels of content than, say, a memo or introductory letter to a customer. SmartArt can also be used to outline an organizational structure to show reporting relationships between employees and managers.

To insert a SmartArt list, select the SmartArt icon from the Insert tab and click on the List menu to see all the options for Lists. Figure 4.28 shows a Horizontal Bullet List, which we can use to list the strengths and weaknesses of WorldCorp in the market trends report. Click OK to insert the SmartArt. As you insert it, the SmartArt Design tab is added to the ribbon, which has options for modifying the SmartArt. Figure 4.29 shows what a Horizontal Bullet List SmartArt looks like.

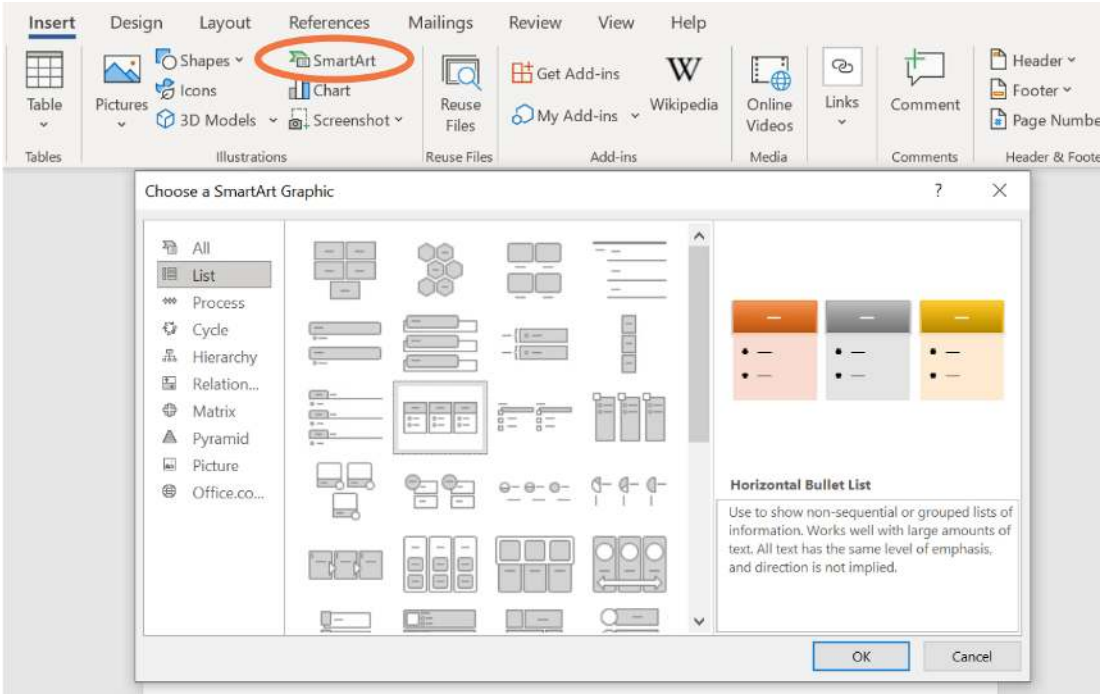


Figure 4.28: SmartArt also includes helpful hints on how to use each type of list best. (Used with permission from Microsoft)

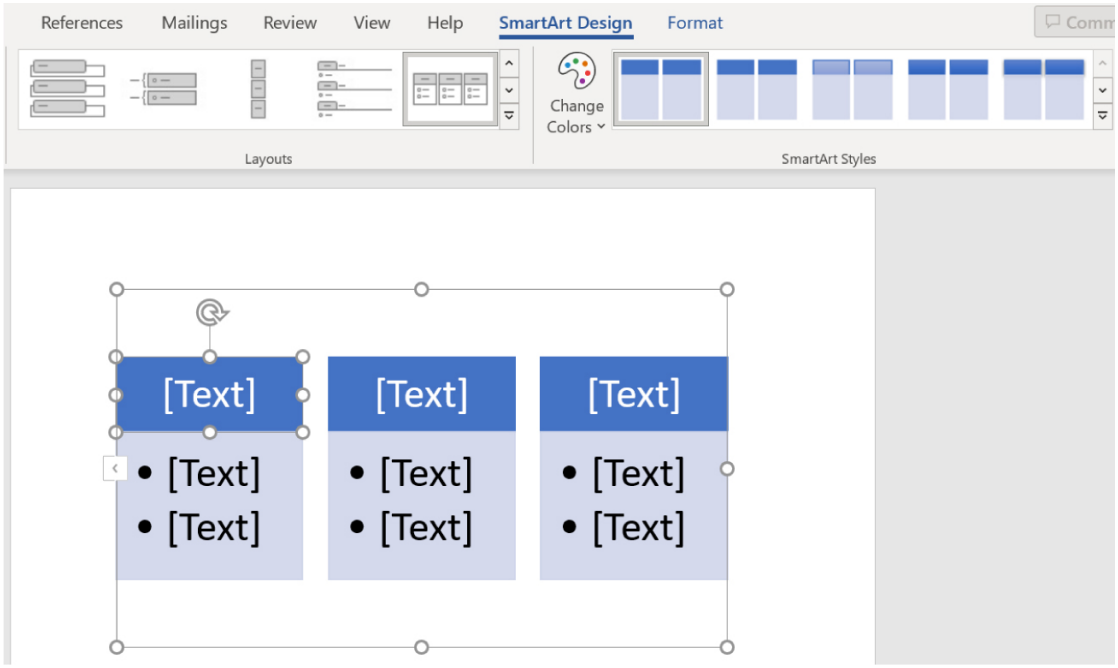


Figure 4.29: Using the text boxes, you can enter the relevant information into the SmartArt graphic. (Used with permission from Microsoft)

Process Charts

Another type of SmartArt is a process chart. This is one of the types of charts that Word offers to enhance documents and is commonly used in business. A process chart is a way of graphically representing a multistep process. Most business processes or workflows can be diagrammed; think about the many steps needed to publish a book or deliver a parcel. These process charts visually organize the steps or major components in a process so that everyone involved can understand what their role is in the workflow. Workers involved in the process may use process charts to check project status or determine which worker or department to consult to move a task along. For your market trends report, you might want to use a process chart to show the sequence of departments that the report will need to move through for approval.

Complex engineering, such as in manufacturing plants, has numerous processes happening at the same time, with each set of processes being dependent on another set. The charts offered in the Process option can help encapsulate the different types of workflows in a company.

In Figure 4.30, you can see a flowchart that needs to be filled. As with the Horizontal Bullet List, the boxes are empty when the SmartArt is initially inserted. To add text, simply click on the text brackets and enter the desired information. Notice there is a line that connects each box to the next one in a down than up pattern, indicating the flow sequence.

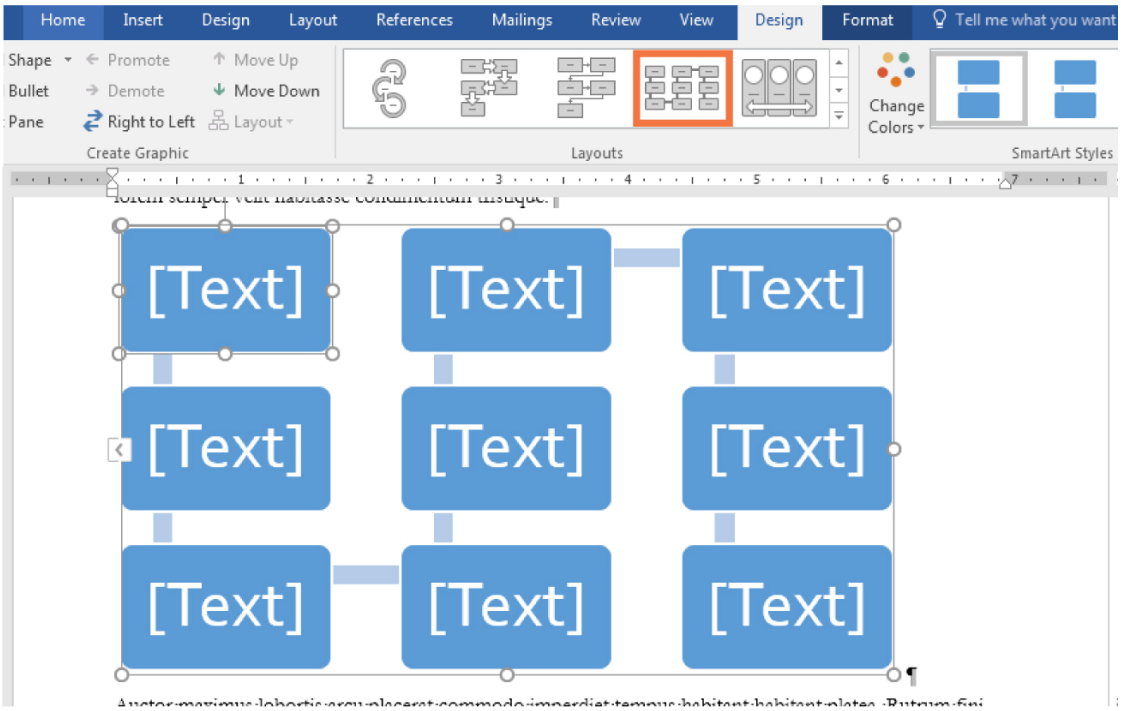


Figure 4.30: This type of SmartArt is called a Vertical Bending Process chart. It can be used to show many different steps in a linear workflow, without taking up too much space on the page. (Used with permission from Microsoft)

Link to Learning

Check out this tutorial to learn about creating flowcharts in detail. This site provides basic terminology and a step-by-step walk-through on how to create a simple flowchart using the Shapes commands and a more complicated flowchart using the SmartArt commands.

Now let's add a process chart to the market trends report. Open a blank document and go to the Insert tab, SmartArt, and click Process. Choose the first option, Basic Process, and click OK (Figure 4.31). You can also change the colors using the tools on the SmartArt Design tab using the change colors palette on the tab (Figure 4.32).

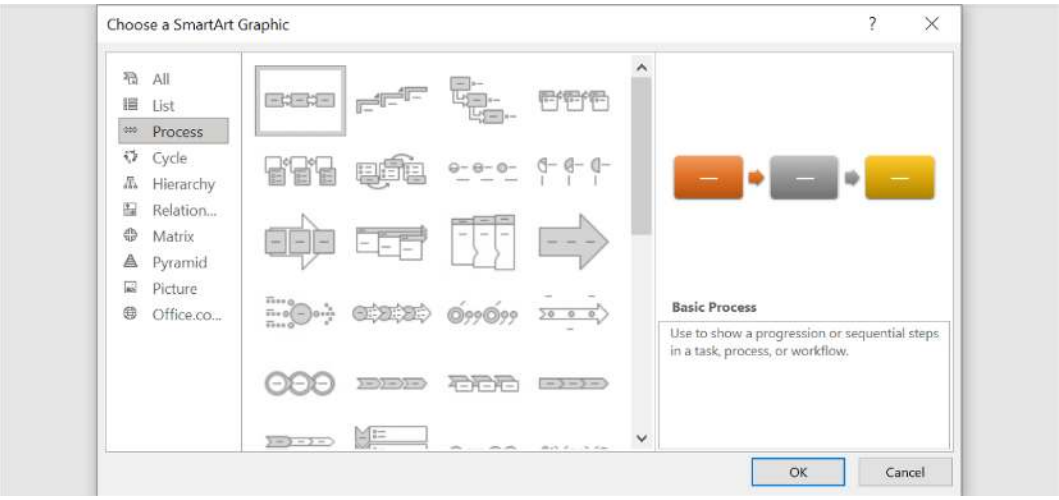


Figure 4.31: Becoming familiar with a Basic Process chart will lay the foundation for progressing to more complex charts in SmartArt that you might need later in the workplace. (Used with permission from Microsoft)

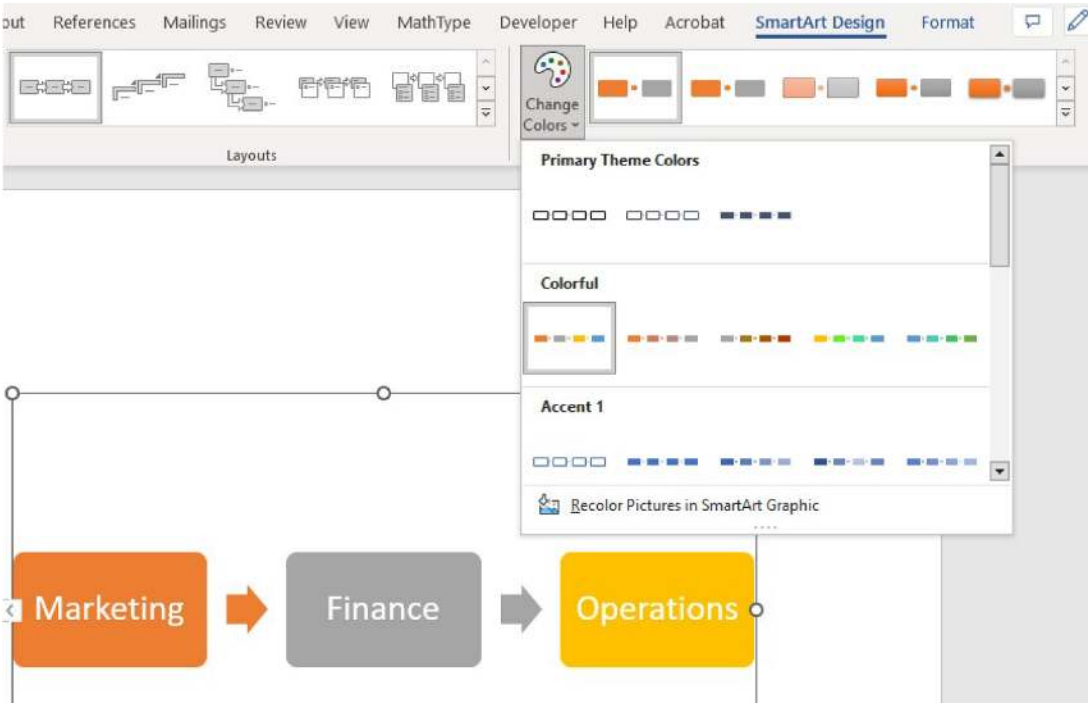


Figure 4.32: The default color scheme is blue and white when the process chart is inserted, but there are many color options to make the process chart look more professional and visually appealing. (Used with permission from Microsoft)

Hierarchy Charts

Another chart often used in corporate settings is the hierarchy chart. These charts typically show the chain of command at a business; in other words, who supervises whom. In a large corporation like WorldCorp, there may be hundreds of hierarchy charts. Every manufacturing center may have dozens, one for each functional department. You could consult these hierarchy charts in a company organizational manual, or online, on the company's intranet. In Figure 4.33, you can see the inserted hierarchy chart of WorldCorp's marketing department.

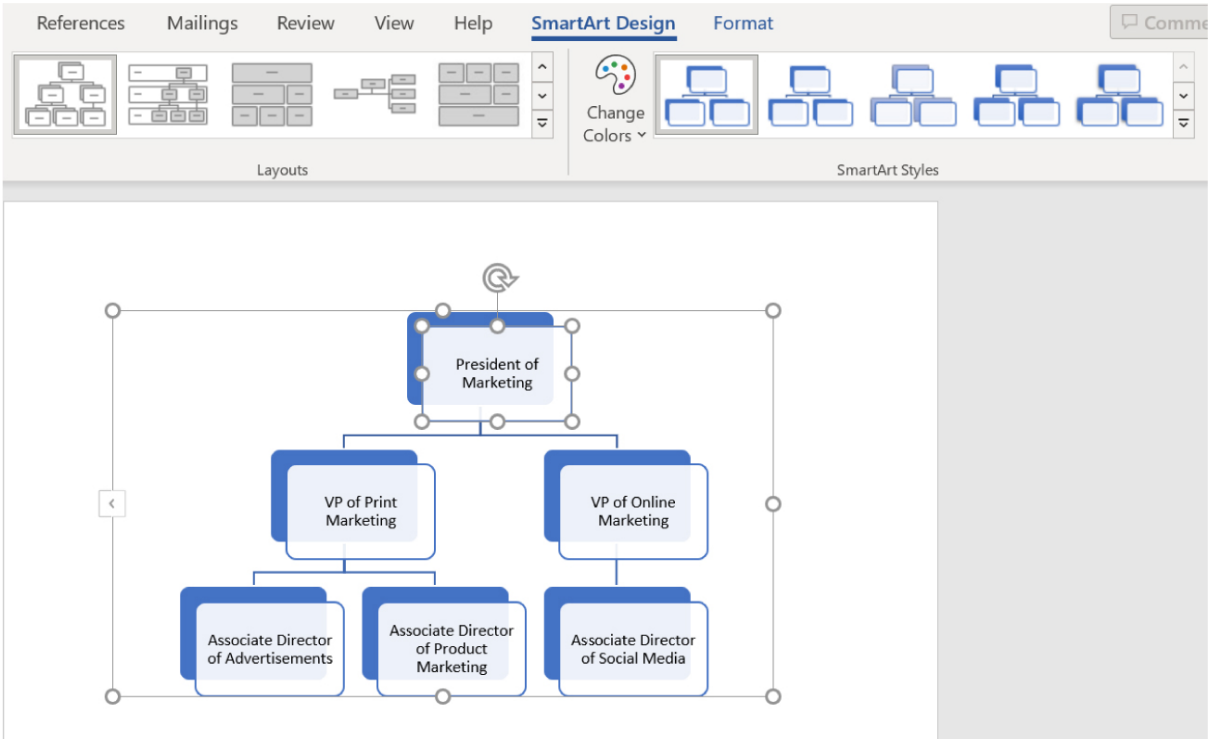


Figure 4.33: You can see the chart formatting and design options on the ribbon on this hierarchy chart. (Used with permission from Microsoft)

Real-World Application: Understanding Types of Organizational Charts

Many companies will include an organizational chart ("org chart" for short) within their internal documentation provided to employees. These serve as important documents that visualize the structure of the company, as well as the chain of command within its service units. Hierarchy charts can help you construct an organizational chart quickly. Before you begin, you will want to identify the type of organizational structure your company has adopted.

Hierarchical organizations will have a clear and linear chain of command, usually organized by product or function, with power primarily held at the top. These are mechanistic, or bureaucratic, organizations. They tend to be formal, with a narrow span of control within each unit. Organic structures are more fluid and flexible. Matrix organizations are a great way to try out a more organic organizational structure, while still maintaining some aspects of a mechanistic structure. In a matrix, employees may report to more than one reporting line and therefore power (and responsibility) is distributed. Dotted lines in such a chart would show informal or secondary relationships. So, before embarking on creating an organizational chart for an organization, first understand its structure to select the most appropriate chart type.

Charts

Charts are another type of visual representation available in Word. While tables present just data, and SmartArt figures show relationships, charts can show both. Word charts include many types of charts that are likely familiar to you, such as bar charts, line graphs, and pie charts. Charts can use data from another source, such as a Microsoft Excel spreadsheet, to create the visual representation.

You can create charts in Word using the tool in the Illustrations command group. You will use some of the data from the sales data in Figure 4.25 and Figure 4.26 to create a bar chart of the quantity sold for each product. When you finish inputting the data, you will see the chart in your document (Figure 4.35). First, select the Chart command in the Illustrations command group, and choose the type of chart that you want to design. Let's choose a bar chart, also known as a Clustered Column chart (Figure 4.34). As you select OK, Word will immediately open an Excel window so that you can enter the data. When you finish inputting the data, you will see the chart in your document. As with the other types of graphical representations that we've covered, once you click on the chart, a new tab will appear in the ribbon. Click on the chart and you can further format the chart using the Chart Format tab that

appears. You can also edit the data in the chart or table using the Edit Data tool on the Chart Format tab, as shown in Figure 4.36. You can choose to edit the data in Word. If you choose this option, an Excel window will open in Word with the data used to build the chart. If you would like to save the data as an Excel file, choose Edit Data in Excel. This will open the Excel application. Here, you can edit the data, but also save the information as an Excel file.

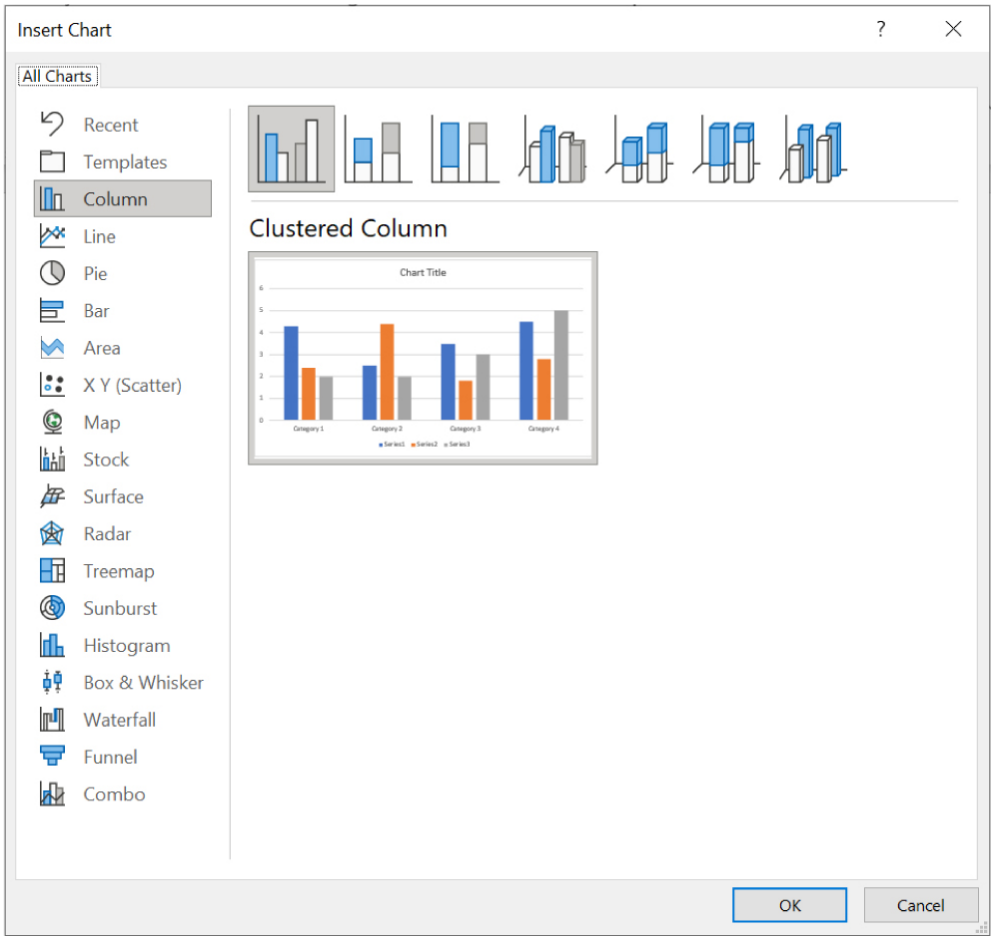


Figure 4.34: Within each chart type, there are many further options for customization. (Used with permission from Microsoft)

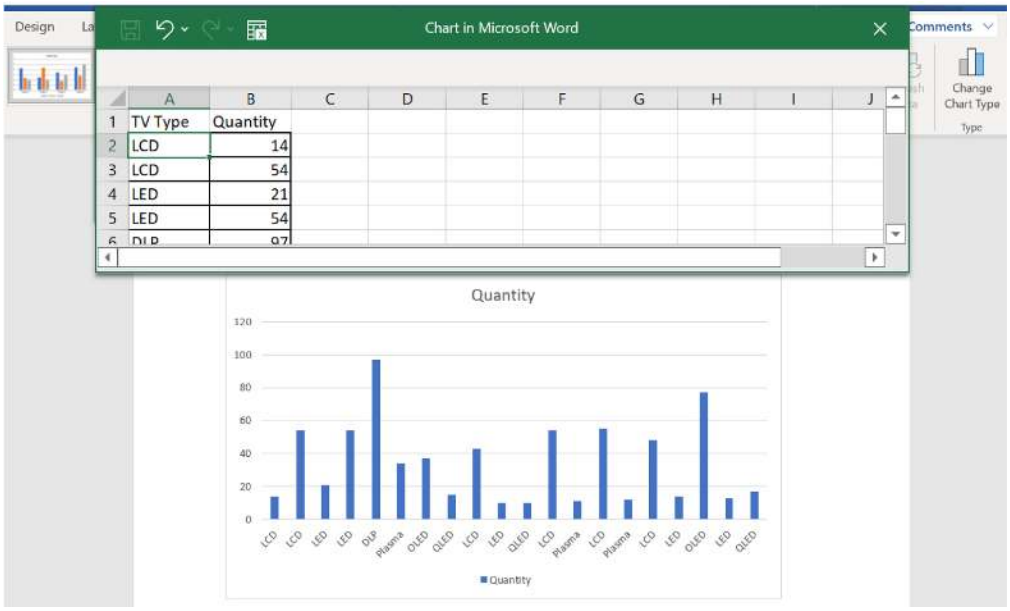


Figure 4.35: As you create a chart, Word will create a new Excel file embedded in the document. You can choose to open the data in Excel using the Edit data tool. (Used with permission from Microsoft)



Figure 4.36: You can change the design and type of chart using the Chart Format tab. (Used with permission from Microsoft)

It is worth noting that when you are looking to design a chart, typically you can use Excel as a starting point for creating your chart. This is often a much easier approach than starting your chart in Word; this process is covered in Working with Spreadsheets. After creating the chart in Excel, you would then copy and paste the chart from Excel into Word or import the file into Word.

Text Command Group

Like the Illustrations command group, the Text command group is located on the Insert tab. It houses the Text Box, Quick Parts, WordArt, Drop Cap, Signature Line, Date & Time, and Object commands. These commands are all related in their functionality, as they are tools to insert autogenerated text or specially designed text.

Text Box

You may have seen a text box, either in a Word document, on a website, or in a print article. It is simply a self-contained square with some text inside. Figure 4.37 shows text box options. The text box is often used in highly graphical documents, such as an email ad, but you may also add a text box for inserting a meaningful phrase, idea, or data that you want to stand out from the rest of

your document. The advantage of a text box is that you can format the rest of the text in your document to wrap around it in different ways, which you will learn about later in this chapter. In essence, it treats a box of text as if it were an image.

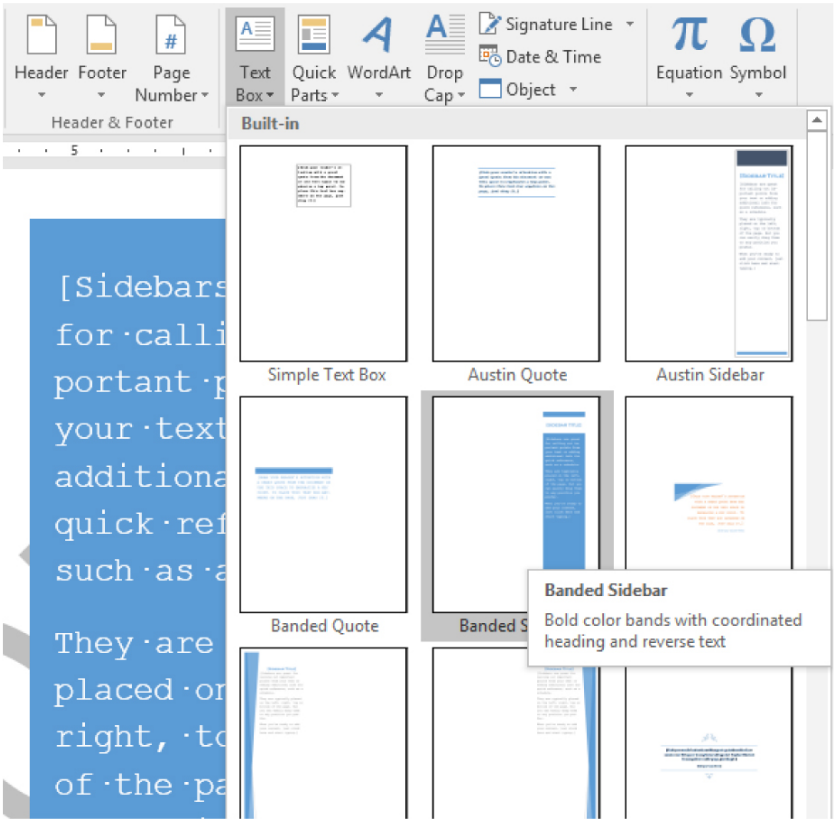


Figure 4.37: Text boxes such as this Banded Sidebar can help make your report more visually appealing and easy to read. (Used with permission from Microsoft)

Quick Parts

The Quick Parts command in the Text command group was also part of the Header & Footer tab that you get when you insert a header or footer. This is an alternative path to quickly add information to the document. Through this menu, you can add a number of items to your document. The first option, AutoText, will automatically add either the author's initials or name to the header of the document. Another option under Quick Parts is to add additional information such as the company mailing address (as shown in Figure 4.38). The Fields option adds fields for a more specialized feature of Word called Mail Merge, which will be covered in the Advanced Document Preparation chapter. This information will only be added if this information was added to the document properties, as you learned in Essentials of Software Applications for Business.

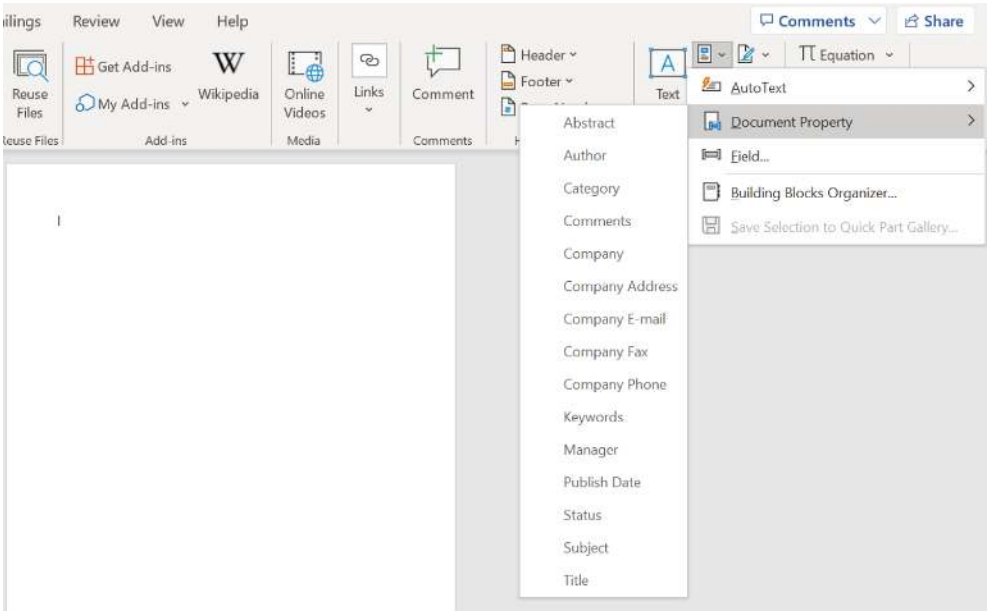


Figure 4.38: Key company information, such as address, email, and phone number, can also be added through the Quick Parts tool. (Used with permission from Microsoft)

WordArt

WordArt is a type of stylized font available in Word. WordArt can be used to add colors, shadows, or borders to text. In can also be used to change the text to be vertical or even diagonal. While it is appropriate to use in graphic-heavy formats, such as front pages of business reports, newsletters, or brochures, it is not appropriate for more text-heavy or professional documents, such as business correspondences, the inside of a business report, a résumé, or a cover letter. That said, using WordArt in your document can be a fun way to experiment and add color and creativity to it. WordArt could also be used to start the creation process for a logo, although many businesses will use a graphic design company to create corporate logos.

Let's practice with the company name, WorldCorp, to get an idea of what WordArt can do for plain text. To insert WordArt, select the WordArt icon from the Text command group Figure 4.39. Choose a style, and a box with "Your text here" will appear on the page, as shown in Figure 4.40. The ribbon will change to add a Shape Format tab, where you can change the color, the font effects, and the position of the WordArt object. Replace the text in the box with "WorldCorp" and choose a design that incorporates blue as the color because this is the company's primary color. Changes are made using the options in the WordArt Styles command group. You may place the WordArt object behind or in front of other objects, or align it in a certain position within the document, as you would with an image.

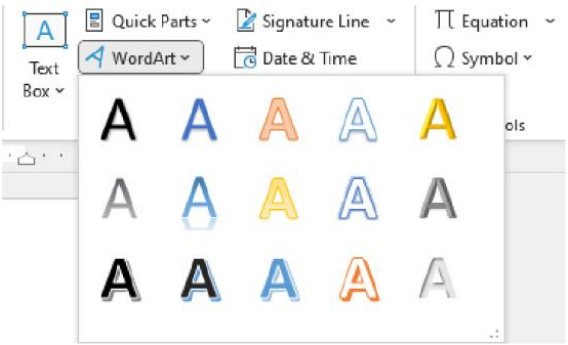


Figure 4.39: Whatever you type in the WordArt box will initially be center aligned. You can change text alignment by going to the Paragraph command group under the Home tab. (Used with permission from Microsoft)

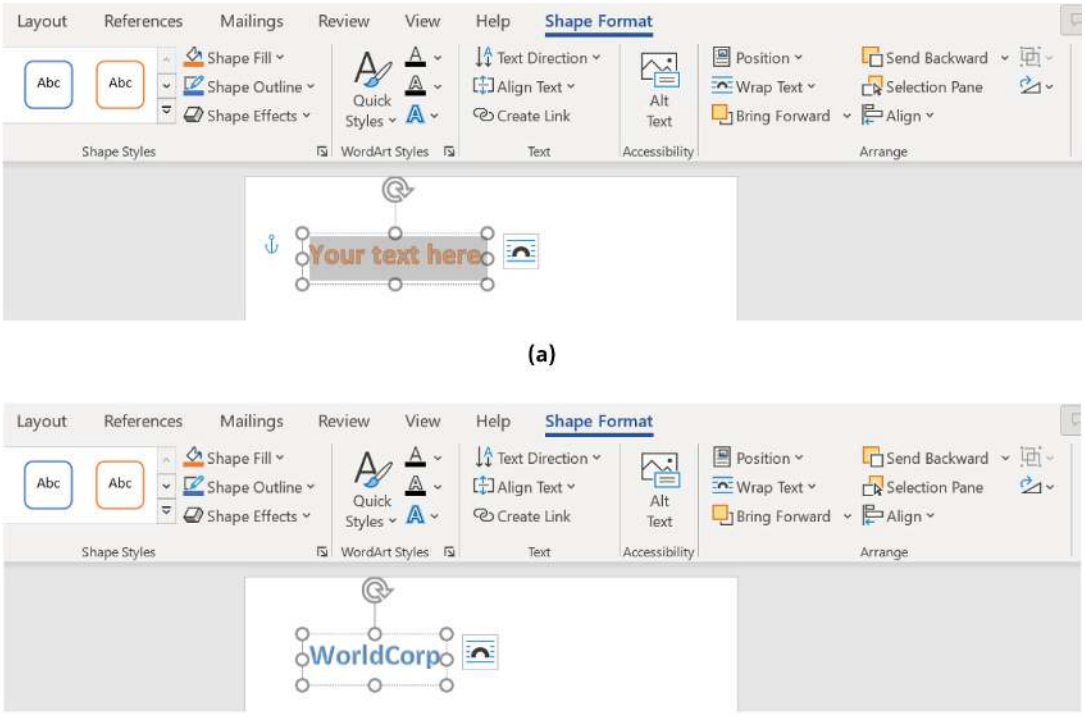


Figure 4.40: (a) When you insert WordArt, you will get another tab on the ribbon to further customize the text. (b) You can send the WordArt forward or backward using the Arrange command group. (Used with permission from Microsoft)

Drop Cap, Signature Line, Date & Time

The formatting options in the Text command group can be seen in books, reports, and other kinds of stylized texts. For instance, you have probably seen a drop cap in a novel or journal article: It's when the first letter of the first sentence is large or in a stylish font, and the rest of the text is wrapped around it. To achieve this effect, select the first letter and choose the Drop Cap drop-down menu from the Text command group (Figure 4.41). Once there, you will see options for font style and placement. You can choose Drop Cap Options to change the font type and size. Generally, drop cap is not used in professional documents such as the market trends report. We are just using it here for illustrative purposes. As you can see from the figure, the large letter T is a bit distracting in the report.

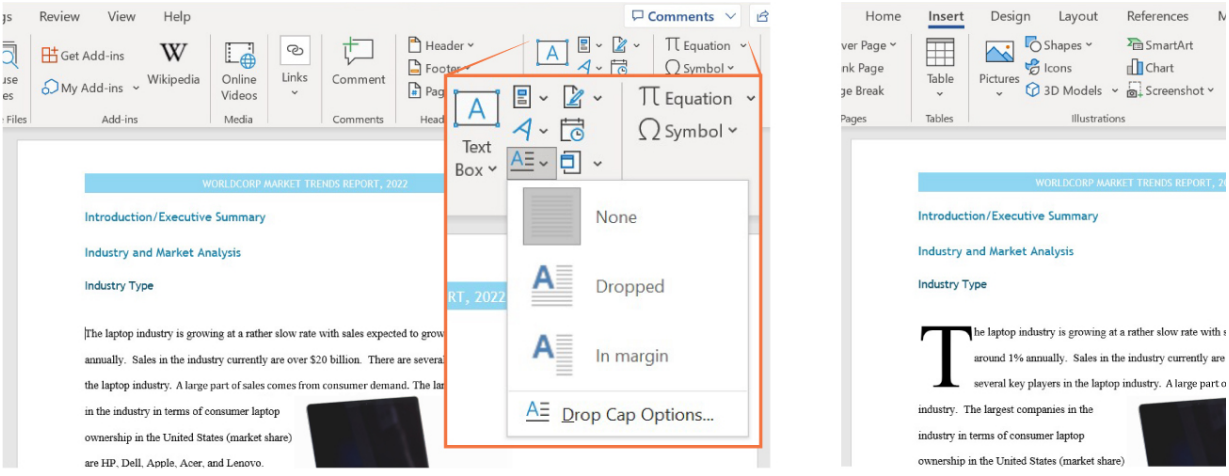


Figure 4.41: (a) You can choose from among a few different drop cap styles. (b) The drop cap design is a decorative style that you might have seen at the start of a novel or magazine editorial. (Used with permission from Microsoft)

You have probably seen a signature line in many emails and letters in Word. The signature line is an autogenerated graphical object that has your name, job title, and email address, as Figure 4.42 shows.

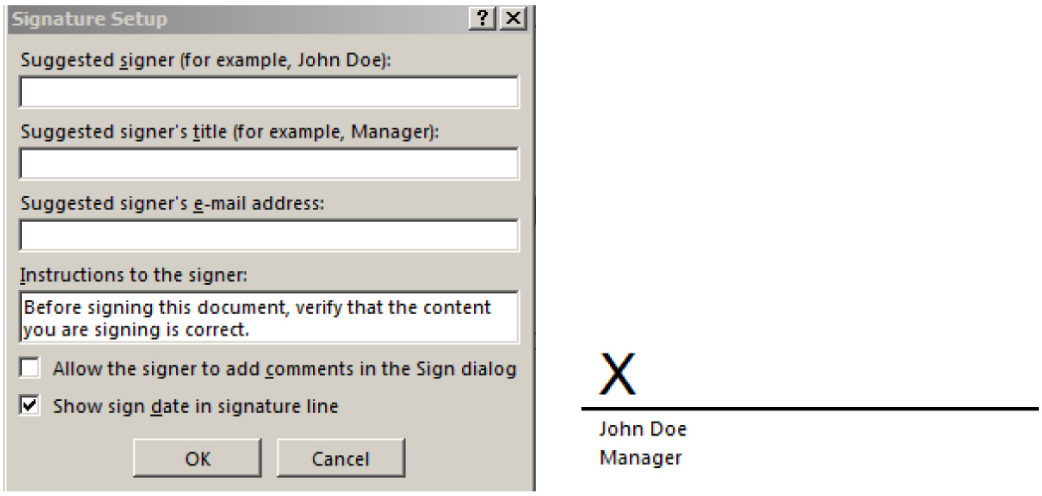


Figure 4.42: The signature line on (b) is what you will see once you fill the dialog box in (a). (Used with permission from Microsoft)

The Date & Time command is an autogenerated time stamp of the date or/and time format of your choosing, as Figure 4.43 shows. You might want to include the date and time stamp to your market trends report as it moves through the development process. This can help you keep track of the edits that are made in the document at various stages of writing or through the different departments at WorldCorp that will contribute to the report. You could include this information as a header or footer in your document. Note that if you use the Date & Time command, it will update to the current date and time, even if you did not make any changes to the document.

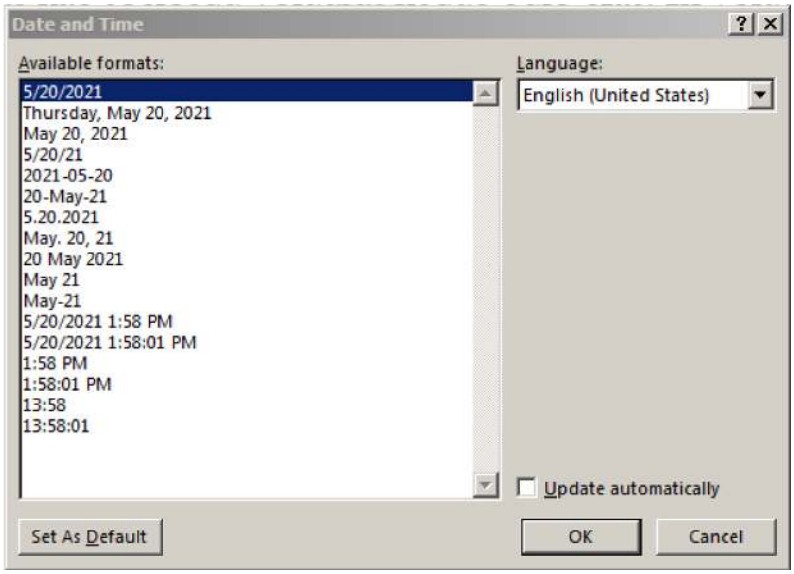


Figure 4.43: You can choose among different date and time formats, depending on the style of your company and what kind of information you want captured. (Used with permission from Microsoft)

Inserting an Object

The final item in the Text command group is Object. An object is anything that is inserted into the document rather than simply typing text. An object can be a wide variety of things, including graphics (WordArt), images, charts and graphs from Excel, links to a web page, files from a program such as Adobe Reader, among others. When you insert an object, Word will create a link to the object and you will be directed to this object when you click on it; it will open in a separate window. This action might be helpful if

you want to direct someone to a file, such as an Excel spreadsheet, without having to actually include all the information in the Word document.

You can also insert an object that links to an outside source, such as a web page. The Object tool can also take text from another file and place that in the current document. This can help you save some time, instead of copying and pasting information from one document to the next. You might consider using this feature for the market trends report because you will have different departments working on different sections of the report.

To insert an object, go to the Object tool in the Text command group on the Insert tab. There are two options in the tool: Object and Text from File, as shown in Figure 4.44. When Object is chosen, a dialog box appears, in which you can select all sorts of file formats if you were to Create New, or Create from File. Create New means that you will create the file within the Word document in the chosen format such as Excel or Adobe. You could also choose to have the link to the object as an icon in your document rather than the first page of the inserted object being displayed. Create from File means that you can use an existing file to insert into the document. The Integrating Applications chapter covers inserting objects in more depth, as it includes the integration of Office programs.

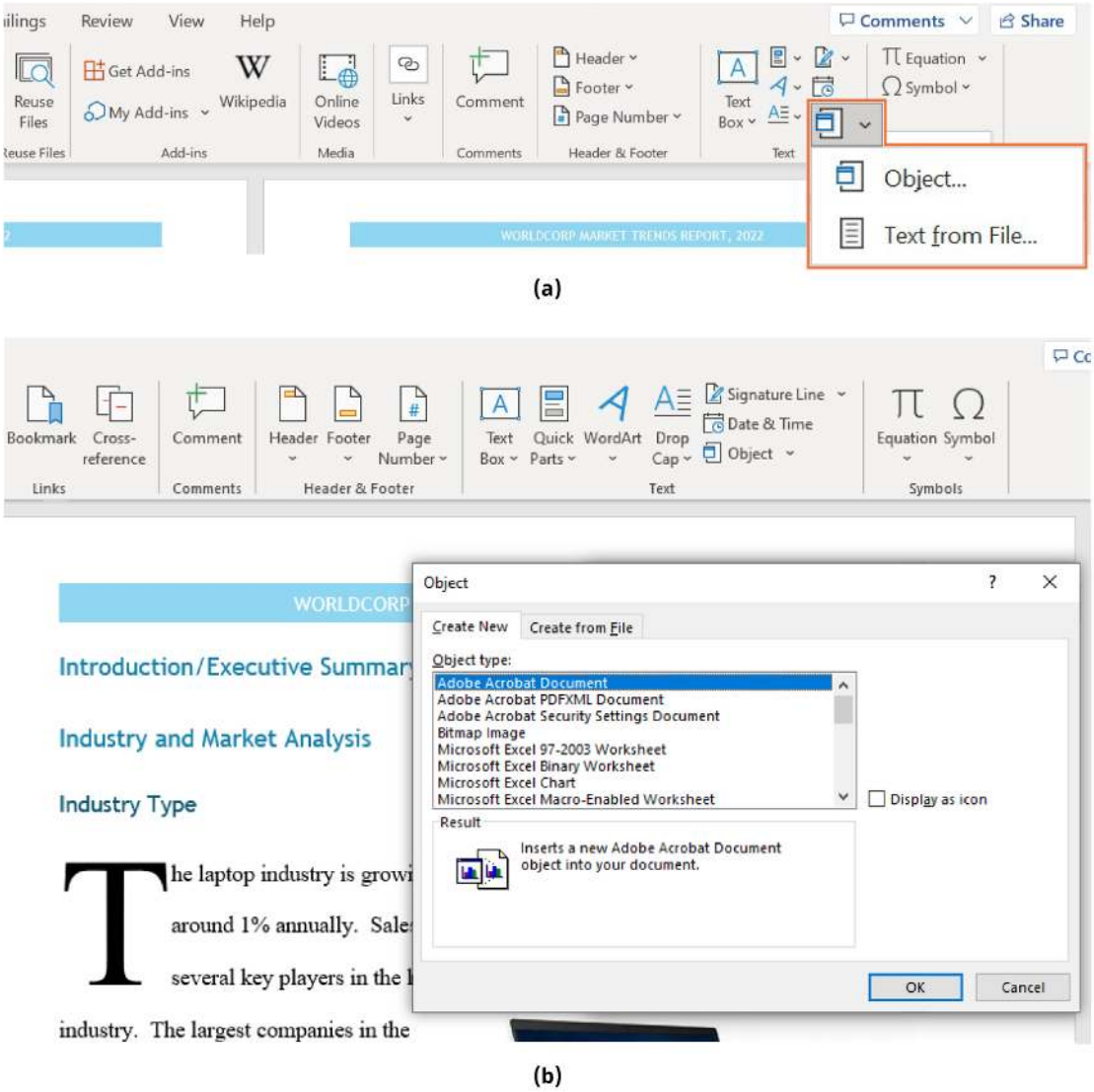


Figure 4.44: (a) You can insert an object or use text from another file in your document. (b) When you choose Object, you can create a new object or use an existing file. (Used with permission from Microsoft)

Symbols Command Group

The Symbols command group is also part of the Insert tab. A symbol is a special character not found on most keyboards, and includes characters such as currency symbols, en dashes and em dashes, arrows, Greek letters (often used in economic or financial math), and many other characters. Figure 4.45 shows some of the character choices available in Word.

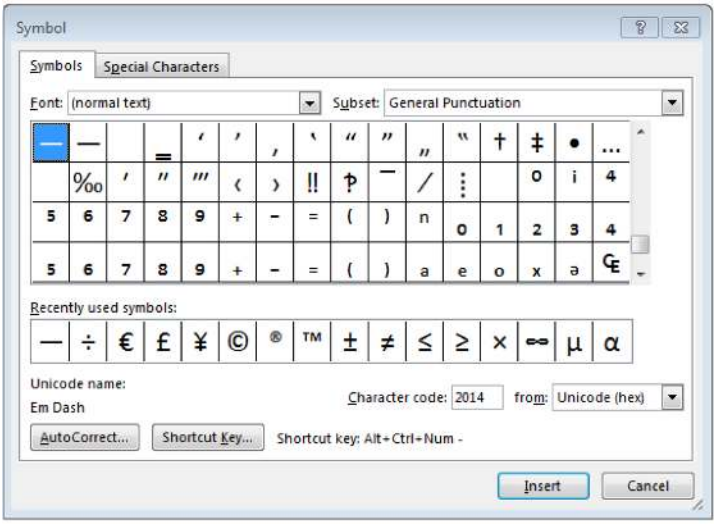


Figure 4.45: You can use the Subset combo box to look for the category you are looking for, to help narrow down your choices. (Used with permission from Microsoft)

The Equation command is for inserting mathematical equations into the document. The drop-down arrow by the Equation tool allows you to see some built-in equations from common calculations, as Figure 4.46 shows.

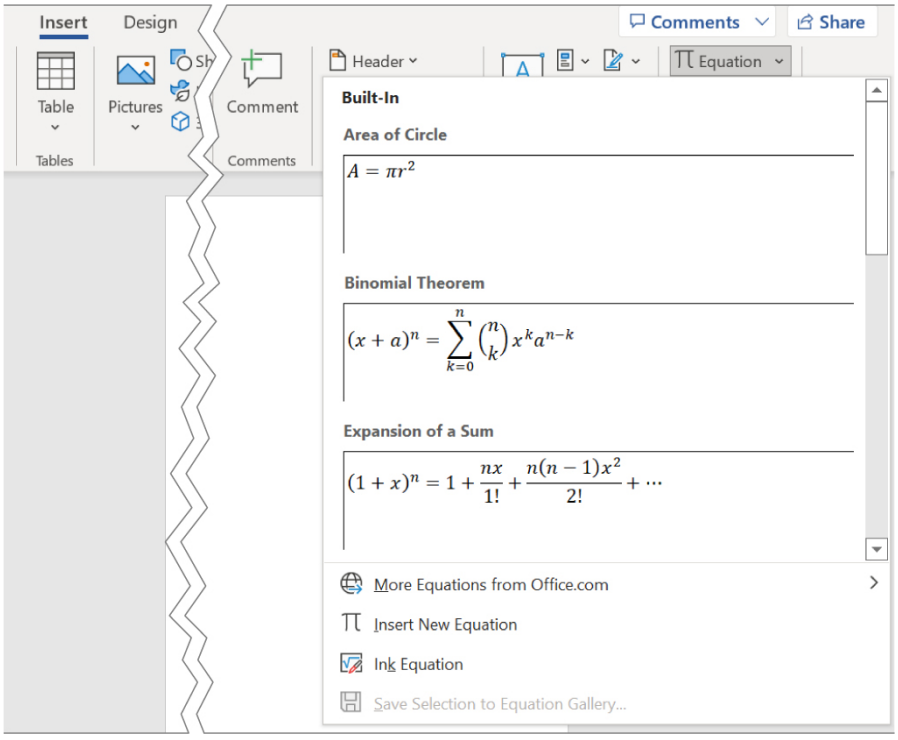


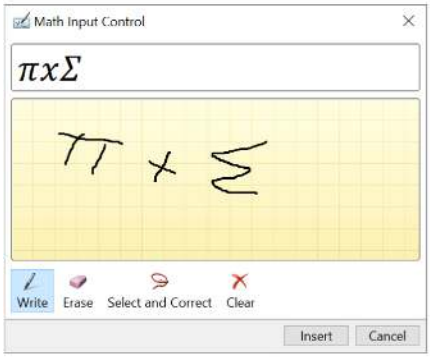
Figure 4.46: Several built-in equations are available in the Equation tool. (Used with permission from Microsoft)

You can also choose to insert a new equation if none of the built-in options meet your needs. When you insert the equation (either new or built-in), a new tab appears on the ribbon called Equation. Here, you can choose the math notation of your choice and build your own equations. This is especially useful for economic and finance research, engineering reports, or any other kind of quantitative discipline or science. You can even draw the equation that you want to insert, and Word will recognize the numbers

and symbols. Select Ink Equation from the Equation drop-down menu. This allows you to use the mouse or your finger to draw the equation symbols if your touch screen or pad allows this (Figure 4.47).



(a)



(b)

Figure 4.47: (a) The Equation tool can be helpful in making your documents look professional when you need to incorporate mathematical equations. (b) Word has the ability to read your drawings and recognize the symbols. (Used with permission from Microsoft)

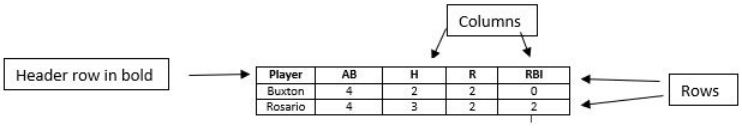
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2.1.7: Creating and Formatting Tables

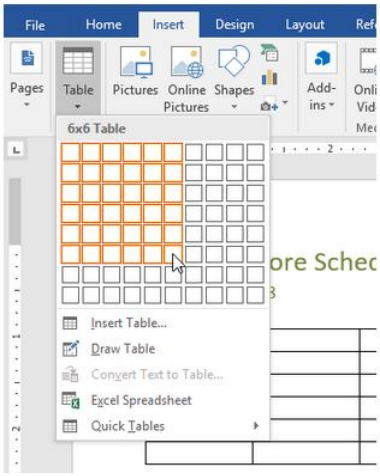
📌 Click here to view Microsoft Word Building Proficiency Chapter Overview

A table is a great way to organize information within a document. A **table** is a grid of cells arranged in rows and columns. Tables can be used to organize any type of content, whether you're working with text, graphics or numerical data. Unlike tabs, table cells can have headers (in bold), as well as borders or boundaries, which make the information easier to read. A table typically includes headings that identify each column or row that contains data. The following is a 5×3 table, which means it has five columns and three rows.



Sample table

To create an empty table, click Table from the Insert tab, and move the cursor over the grid to select the number of cells for the table. Click the grid to create the table and then type text into the individual cells.



Insert Table

Word automatically adjusts the column widths to be equal so that the table fills the space between the left and right margins. To manually adjust the width or height of a cell, drag the border. Press the Tab key to move from cell to cell. If the insertion point is in the last cell, pressing the Tab key will automatically add a new row.

If the number of rows and columns you create turns out to be different than what is needed, you can easily add or delete rows and columns via the Table Tools Contextual tab. The Layout side of this contextual tab will also allow the user to change cell size, merge & split cells, sort table data, change text alignment, and modify table properties.

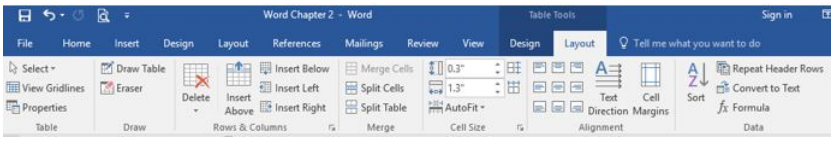


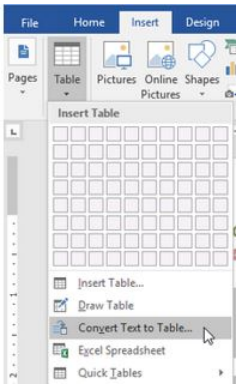
Table Tools tab

The Table Tools Design tab offers additional functionality to modify Word tables. Design elements include defining Table Style Options, like Header and/or Total Rows, selecting from a gallery of Table Styles, as well as adding shading and borders. You can easily insert and delete table rows and columns via this tab as well.



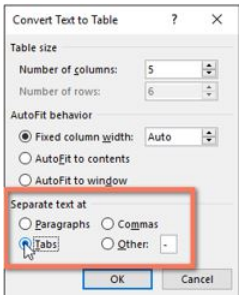
Table Tools Layout tab

It is possible to create a table from text that already exists.



Convert text to table

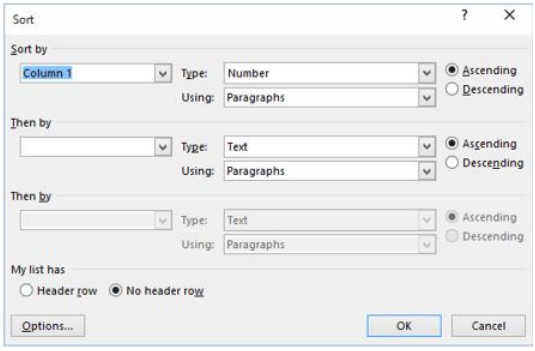
However, the data must be consistently separated, field-by-field, using a delimiter. A **delimiter** can be tabs, paragraphs, commas or some other user-defined character which is used to separate each field. With the cursor residing inside the existing source data, select the Convert Text to Table… option from the Table tab of the Insert ribbon.



Delimiter Separator

Clicking an option from a menu that ends with the ellipsis notation (…) indicates that a dialog window will appear. The Convert Text to Table dialog window allows the user to define the table size, AutoFit behavior, and the delimiter.

The contents of the rows in a table can be sorted based on a column. Users can sort in alphabetic (text), numerical (numbers), or chronological (dates) order using either Ascending (A → Z) or Descending (Z → A) manner. Clicking the Sort button on the Table Tools Layout tab will open the Sort dialog window.



Sort Word

The Sort by options will be the column headers, or Column 1, Column 2, etc. if there is No header row. The first sort selection is known as the primary sort, followed by the secondary, and tertiary sort options. The Type drop-down list will offer the choices of Text, Number or Date, depending on the existing table data. Make sure to choose either Ascending or Descending for each sort level.

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2.1.8: Creating Different Document Types in Microsoft Word

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Learning Objectives

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

- Create a template
- Create a business memo
- Create a letterhead and an envelope
- Create a business card
- Create a brochure and a flyer
- Create an invoice
- Create a business plan
- Create a résumé and a cover letter

Having different document types ready to go can be useful, in both everyday life and your professional life. When it comes to something like applying to jobs or schools—a task that requires writing a similar document, multiple times—you don't want to waste time by starting from scratch for each application. You can do this by using a template, which we learned about in Creating and Working in Documents. This section will show you how to create your own template for a few different document types, including memos, letters, envelopes, business cards, brochures, flyers, and invoices.

Templates

In Creating and Working in Documents, we defined what templates are and where to find them in Microsoft Word. There are also a number of templates available on the internet. Word has web search capability so that you can look for additional templates on templates.office.com, as you can see in Figure 5.2. On the Office template website, there are thousands of templates that can help entrepreneurs and small businesses start making their business more systematic. You can find Word templates for email advertisements, calendars, brochures, memos, business cards, invoices, business plans, warehouse receipts, and more. Once you download the template, you can populate it with data and further modify its appearance.

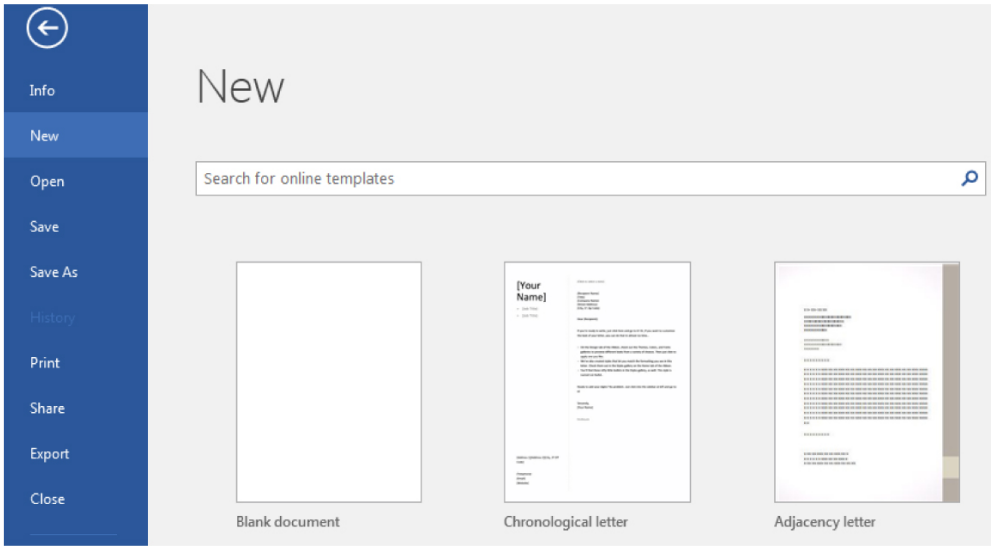


Figure 5.2: You can search for templates using the desktop version of Word, or you can go to your web browser and download the templates. (Used with permission from Microsoft)

Using prebuilt templates can be incredibly useful, but sometimes you might use a custom document type often enough that you want to save it as your own template. To do this, go to the File tab and use the Save As command to save the document with the

.dotx extension. That will save the document as a template. This means that every time you open this .dotx file, a new file will be created, with all your formatting already in place. Once you make your edits to the new document, use the Save As command again to save the template file (.dotx) as a standard Word document file (.docx), making sure to choose the .docx extension to keep the changes. This will ensure that your edits are saved to a new document not to the template file. The .docx files are standard Word documents used for editing and sharing, while .dotx files are Word templates used for creating new documents with a consistent format and style. These same steps need to be followed when building a template for any kind of file, whether it is a memo, envelope, brochure, flyer, or invoice.

Link to Learning

While Word comes with many fantastic templates installed, there are many more available online that are free and can be used with Word. A Google search will garner thousands of available templates. You will likely come across Canva in your search. Canva does provide access to some free templates; however, these files must be edited in that service and are saved and downloaded in file types that are not necessarily fully compatible in Word. When searching for templates, be sure to verify they are indeed compatible with Word and come from a verified and trusted source.

Business Memos

Word has templates for memos and newsletters. These are similar forms of communication in that they both inform a large group of new changes or trends in a company and may call for action. Yet there are some differences. Memos are used internally, while newsletters are for external audiences. Memos also usually have a standardized format. Newsletters have more freedom of form and may incorporate a lot of graphics. Like brochures and flyers, both have been digitized in the form of emails.

Despite the widespread use of email, printed business memos are still commonly used to communicate important information within a company. Memos typically follow a specific format, which formal company email transmittals may also do today. One common structure is to include an opening thesis statement, the main issue, and a closing statement. The opening is an introduction, and it may recall some relevant past activities, or current activity. The main issue should include the changes that are being announced to the company. The closing is a reminder of the current project general objectives. It may also include a complimentary closing, such as, “Thank you for your kind attention,” or something similar. Last comes the signature, which is the sender’s name, job title, and email address.



Figure 5.3: Today's emails have copied the classic style of a business memo. (Used with permission from Microsoft)

Like an email, a memo should always include fields for To (the employees), From (typically management), and CC, which stands for "carbon copy." In the 1980s, before personal computers, letters were typewritten, and a piece of carbon paper was inserted between two sheets to make a copy of the letter. The copy created by the carbon paper was the "carbon copy," or "CC." CC'ing others is a process still used in emails today, although of course there is no physical hard copy involved.

Memos should also include fields for the Date and a Subject. You can see a memo template that was downloaded from Microsoft's template page in Figure 5.3.

Newsletters can follow a similar format but consider that your audience will be different. You may want to use different language, incorporate graphics, or include more details. Newsletters may not only communicate information and updates to an external audience but are often used as advertising. Microsoft's newsletter templates are a good place to get started if you are not sure how to format your newsletter.

Link to Learning

Newsletters are the most popular email advertisement form. Read this step-by-step guide to writing a newsletter at Readz.com. You can find advice on newsletter creation, the audience, the types of newsletter formats, idea prompts, and more.

Letterhead and Envelopes

A letterhead is a type of heading that contains company contact information and a logo. It can be used in many scenarios, both personal and professional. Figure 5.4 shows an example of a professional letterhead for a business. The logo and company contact information will go at the top right of the document. The information in the template is generic so that you can customize the template with your specific company information.

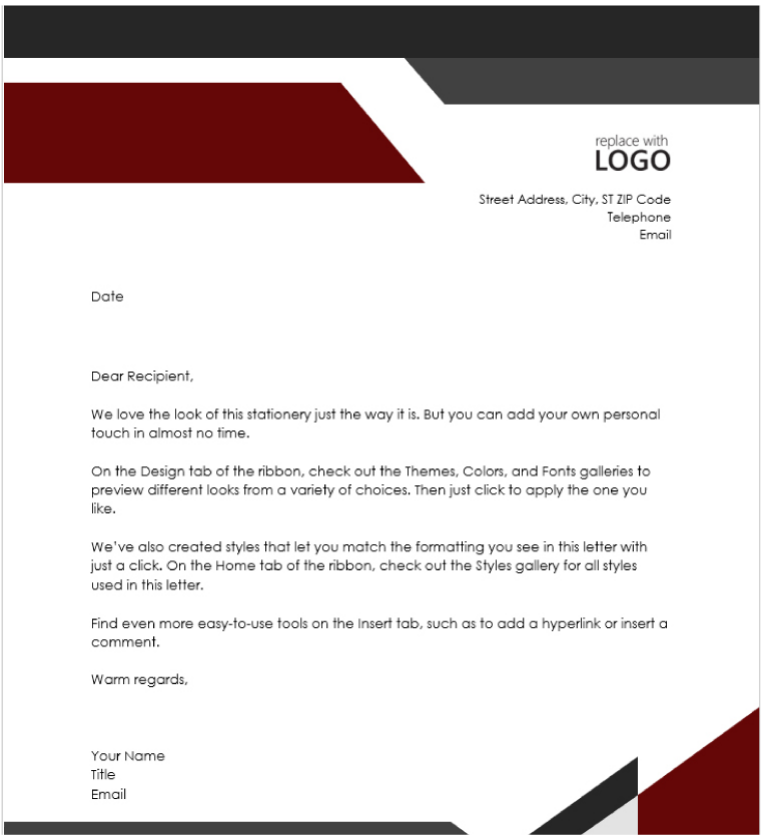


Figure 5.4: Using the letterhead templates can make creating a brand/image for your company easier by providing prebuilt designs. (Used with permission from Microsoft)

Business letterheads are also used in conjunction with company envelopes. You may have preprinted company envelopes with the company logo on them. If not, you can create one using templates. When corresponding by mail, it is much more professional to have a printed envelope with the recipient's information, rather than have handwritten details. While we will cover creating envelopes for larger mailings in the next section, here we are focused on printing one or two envelopes.

Word has templates and other customizable capabilities to create printed, custom envelopes. You just need to fill in your address with your name in the left corner, and fill the recipient's data in the middle. To print the envelope, you will need to load the envelope in the correct orientation in the printer. Then, you will go to the File tab and select Print. Printers can vary by brand, so consult the owner's manual for your printer or search online for the proper way to print an envelope.

Using the Envelopes command is another solution, and it allows for more customization. You first need to make sure that your address is saved into Word's settings. This is done through the Options command, located on the File tab. Selecting the Options command will open a window, and inside that window you will see a tab called Advanced. This is where you can set your address, as Figure 5.5 shows.

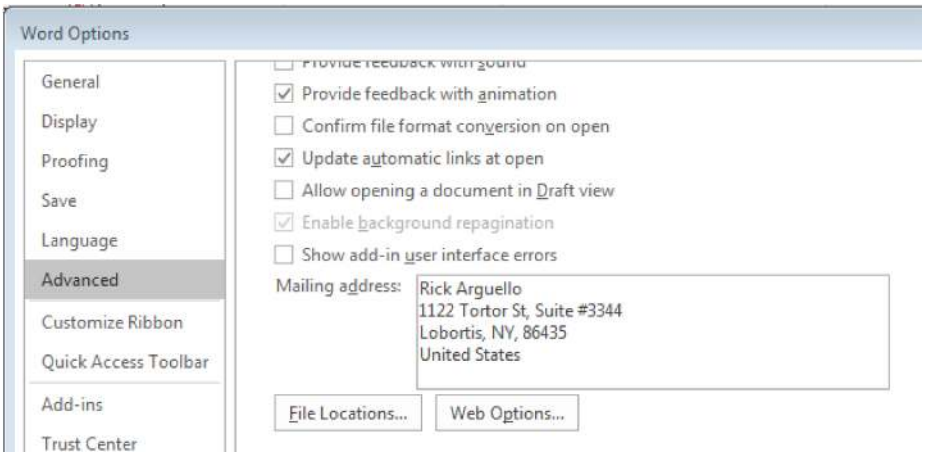


Figure 5.5: The Advanced tab of the Word Options window is where you can make sure your address is saved. (Used with permission from Microsoft)

Mac Tip

From the Tools menu, click on Envelopes. You can make formatting changes here. Also, in the Tools menu, there is an option for Labels, which has a similar functionality for preparing mailing labels.

Next, go to the Mailings tab and select Envelopes. In Figure 5.6, you can see the dialog box that will appear. The blank address is the recipient's address, and on the bottom is your autogenerated mailing address. If you want to change the envelope size, choose Options, and you will see a combo box with the standard sizes (Figure 5.7). When you finish typing the recipient's address, click on Add to document.

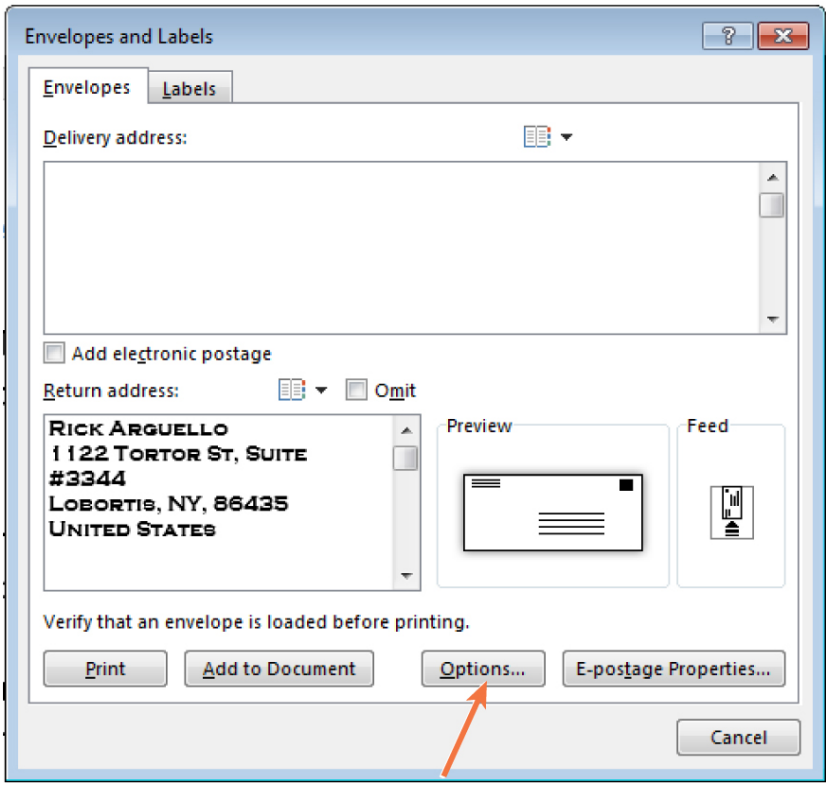


Figure 5.6: The Envelopes and Labels dialog box shows you a simple preview of what your customized envelope will look like. (Used with permission from Microsoft)

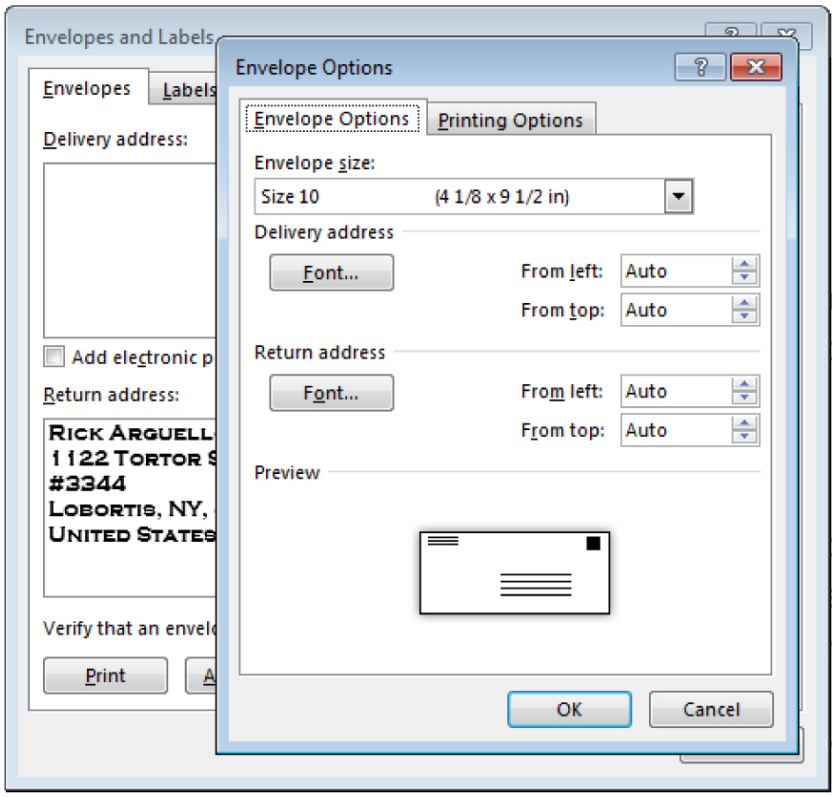


Figure 5.7: The Envelope Options dialog box allows you to customize the placement of addresses, as well as set custom printer settings. (Used with permission from Microsoft)

As Figure 5.8 shows, the envelope is inserted as the first page of the document, and along it, there is a section break. If you want to repeat the styling and envelope size again, it would be a good idea to create the envelope in a new blank document, and then save it as a .dotx.



Figure 5.8: This is what the Envelope command will ultimately generate. (Used with permission from Microsoft)

Business Cards

A business card is a small, typically wallet-sized card that contains your contact and company information. It is usually given to clients or potential clients when you meet them, so that they have your contact information easily available. Business cards may be provided to you by your company, or, if you are self-employed, you may make them yourself. They usually contain basic contact information, like your name, your position (title) with the company, your phone number, and your email address, in addition to some eye-catching design elements, like a logo or image. Business cards are usually printed on thick, sturdy paper called cardstock.

Many companies will order business cards for their employees using approved company designs and layout; at WorldCorp, the marketing department is responsible for providing business cards to employees. However, if you are a small business owner or freelancer, you might have a need to create your own business card.

You can easily design a business card in Word and send it out for printing at a business card printing shop, where you will likely have a few different cardstock options (lighter or heavier weight, glossy or matte finish). You could also purchase the cardstock and print the business cards on your own. This paper is generally perforated and some major paper companies that produce this type of paper have templates for their products in Word. Some of these printing companies may want your design in .pdf format. As we discussed in Creating and Working in Documents, having a document in .pdf format means that the design elements will not change at all, no matter who opens the file. If you send the printing company a design in .docx format, some elements might move when they open the file depending on which program they are using to open and print the file.

In Figure 5.9, you can see most of a business card template that we downloaded from Microsoft. The page has ten business cards per page. Simply fill out the information in the fields provided. Once you fill in one area of the first card, it will auto-populate the same area in all the remaining cards.

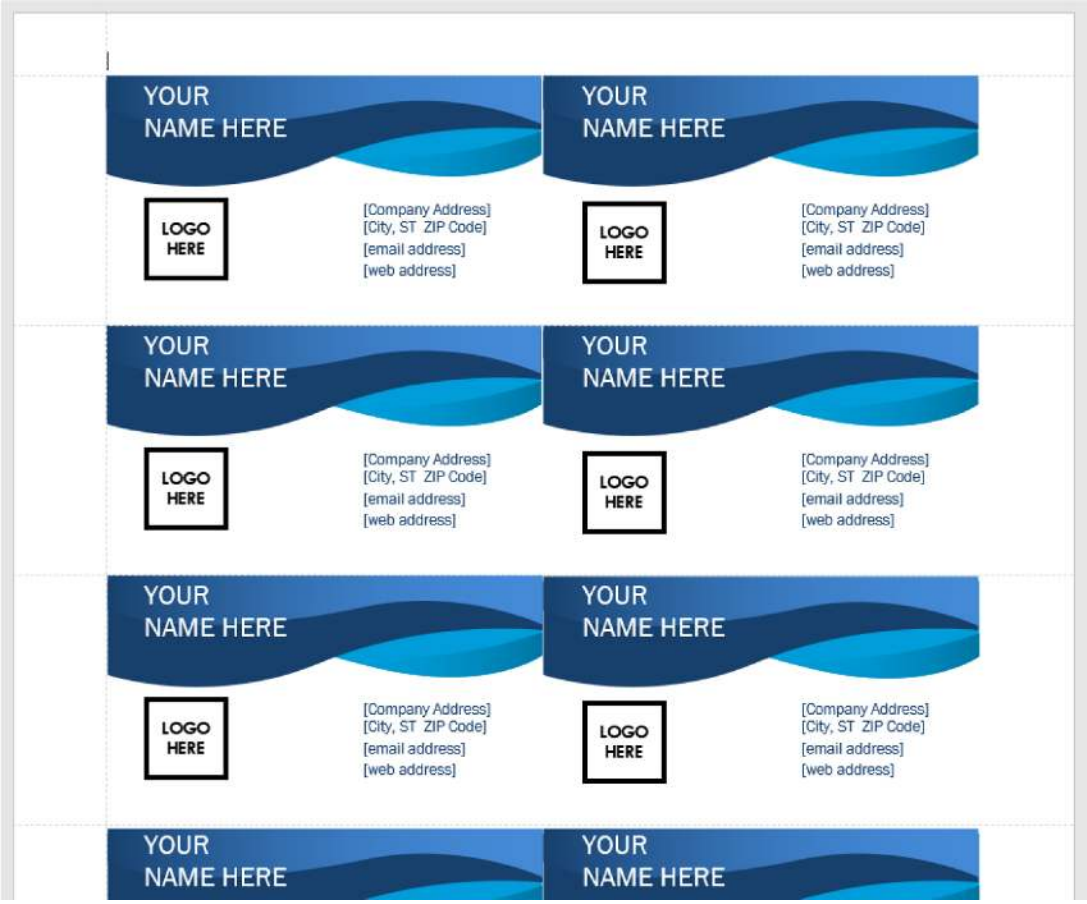


Figure 5.9: Using a business card template can make designing your cards easy. (Used with permission from Microsoft)

Brochures and Flyers

Both large and small businesses use advertisements to display what the company offers and detail the specifications of the offer. Brochures and flyers are a printed form of advertisement. Although many advertisements are found on the internet these days, printed ads are still popular. Flyers tend to be graphic-oriented, contain minimal text, and often advertise an event or temporary promotion. Brochures can be an introduction for a company or specific product and may be used for a longer duration than a flyer.

As with many documents discussed so far, the best way to create a brochure or flyer is to download a template from Microsoft, and then fill in the information. Because brochures and flyers can be image-heavy and can have complicated layouts, using a template

is the fastest and easiest way to create them. With a template, you can establish a base layout, and then easily change the images and the color scheme.

In Figure 5.10 and Figure 5.11, notice the default design of a brochure from Microsoft's template page called Business Brochure. The brochure is two pages, as it is designed for double-sided printing. The brochure is also set in a three-column layout that is meant to be a trifold design. The layout is there, and all you need to do is change images, the color scheme (if desired), and the text.

At WorldCorp, the marketing department plans a holiday toy drive each year. Your boss has asked you to create a brochure with the details for the drive to be distributed to all employees. You can use this template to create the brochure for the event. We will walk through the steps to create this brochure in the following sections.

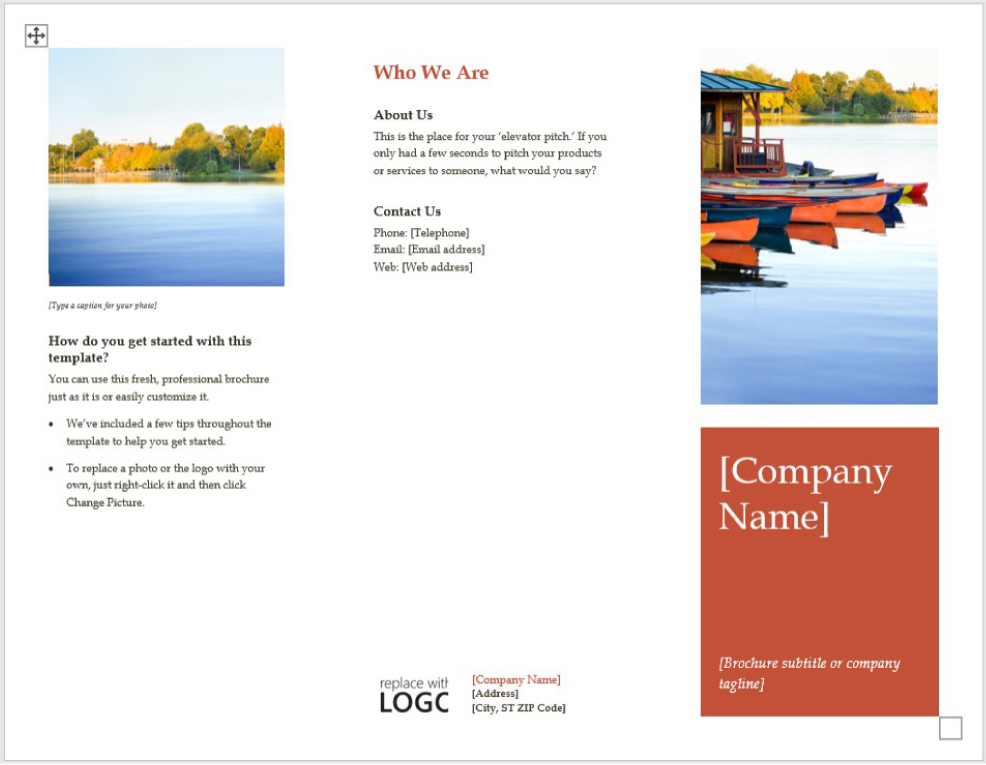


Figure 5.10: This template is a trifold design. When folded, the panel on the right is the cover and the panel in the middle is the last page. (Used with permission from Microsoft)



Figure 5.11: Designing the brochure from an existing template saves time. (Used with permission from Microsoft)

To change the two images, right-click on one of them and select Change Picture, as shown in Figure 5.12, then browse to the folder where the image is and select Insert.

Mac Tip

On a Mac, the command is Control+right-click.

If the new image is too wide, use the command Crop from the Picture Tools Format tab. To change the color scheme for the whole brochure, go to the Design tab and click on the Color drop-down menu, as in Figure 5.13. Changing the colors this way will change the color palette for the whole brochure. Finally, to change the actual text, put your cursor on any of the panels of the brochure and change it manually. In this example, you changed the pictures and the text on the first page of the brochure to include details of the toy drive at WorldCorp.

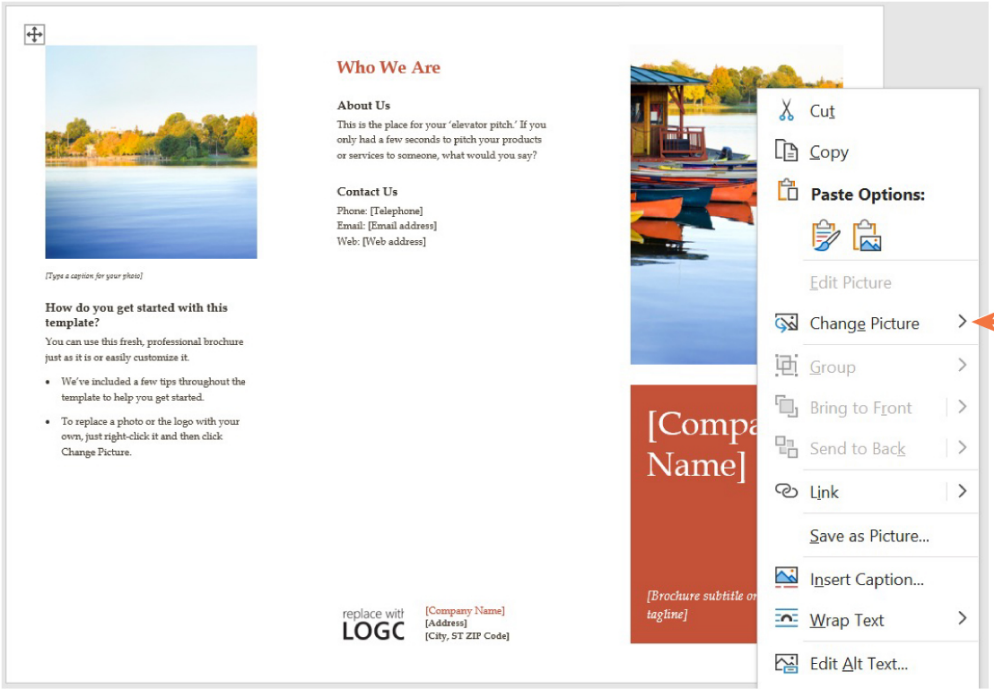


Figure 5.12: The pictures can be customized to your needs either from stock photos, photos on your computer, or photos you find online. (Used with permission from Microsoft)

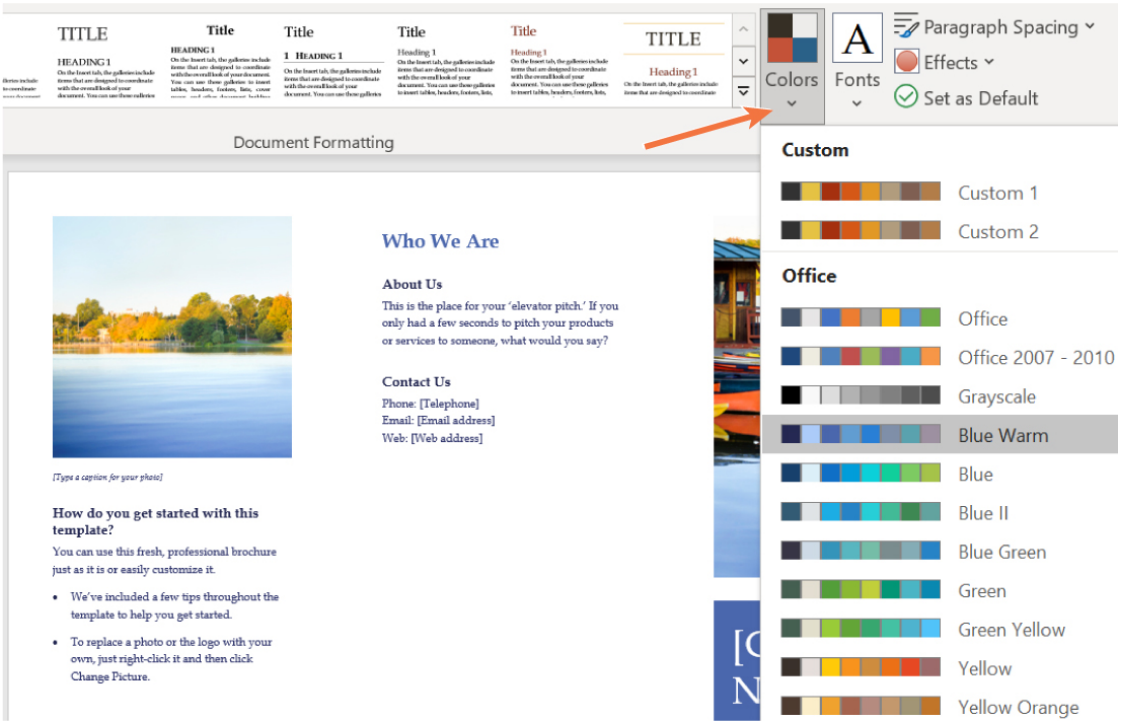


Figure 5.13: The color scheme can be changed using the Design tab. (Used with permission from Microsoft)

To create a flyer, choose a flyer template from Microsoft's templates, and follow the same steps as for creating a brochure. As you can see in Figure 5.14, flyer templates are just one, single page, meant to be printed single-sided on one sheet of paper.

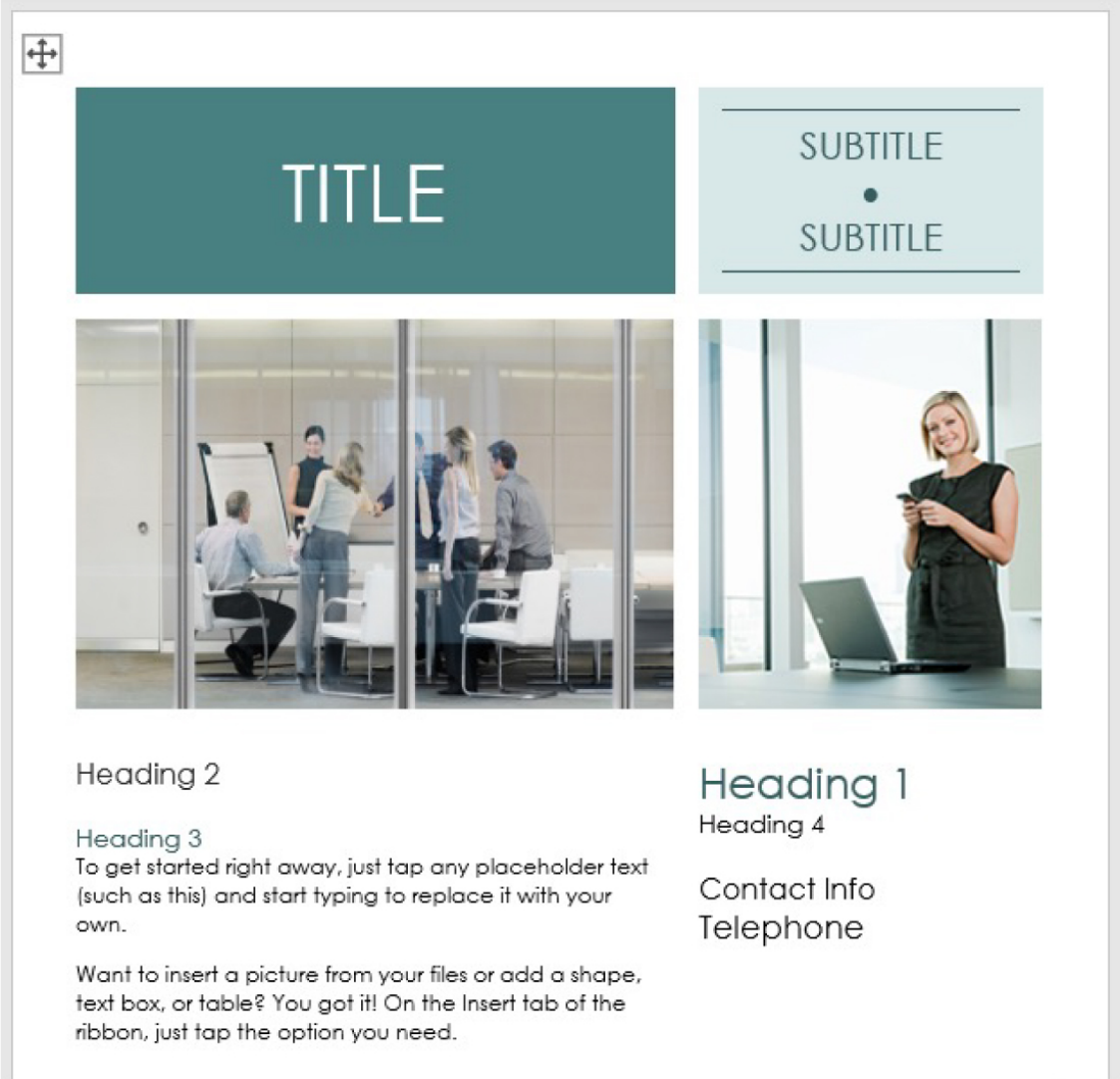


Figure 5.14: A flyer is similar to a brochure, but it is printed on one single-sided page. (Used with permission from Microsoft)

Invoices

An invoice is an important document. It is essentially a bill given to a customer for a product or service provided by a company. You may encounter invoices either as a recipient or the sender. If you are the one purchasing a good or service, you will receive an invoice. The invoice tells you how much you need to pay. If you are the one selling the goods or services, you will need to create the invoice yourself, then send it to the company or person making the purchase. In both cases, an invoice should always explain what was provided, sold, and what is owed.

There are many kinds of invoices for many kinds of businesses, but all invoices should have a date, invoice number, description of the goods sold or services performed, the quantity, the price per item, the total, and the payment due date. The Microsoft 365 collection of templates has many designs and types of invoices by industry. Using a template to design your invoice can be helpful because invoices often include complex table formatting that can be difficult to design. The invoices can vary based on whether you are providing a service, such as maintenance (for which you might charge an hourly rate), or providing an actual product, like WorldCorp's laptops and TVs (for which you might charge a per-price fee or flat rate).

You can create an invoice by following the same steps outlined above for brochures and flyers: by creating a new document and selecting an invoice template. Just as you would with the other document types, click in the text boxes to make the necessary adjustments to the information in the invoice. Figure 5.15 shows some of the different invoice templates available.

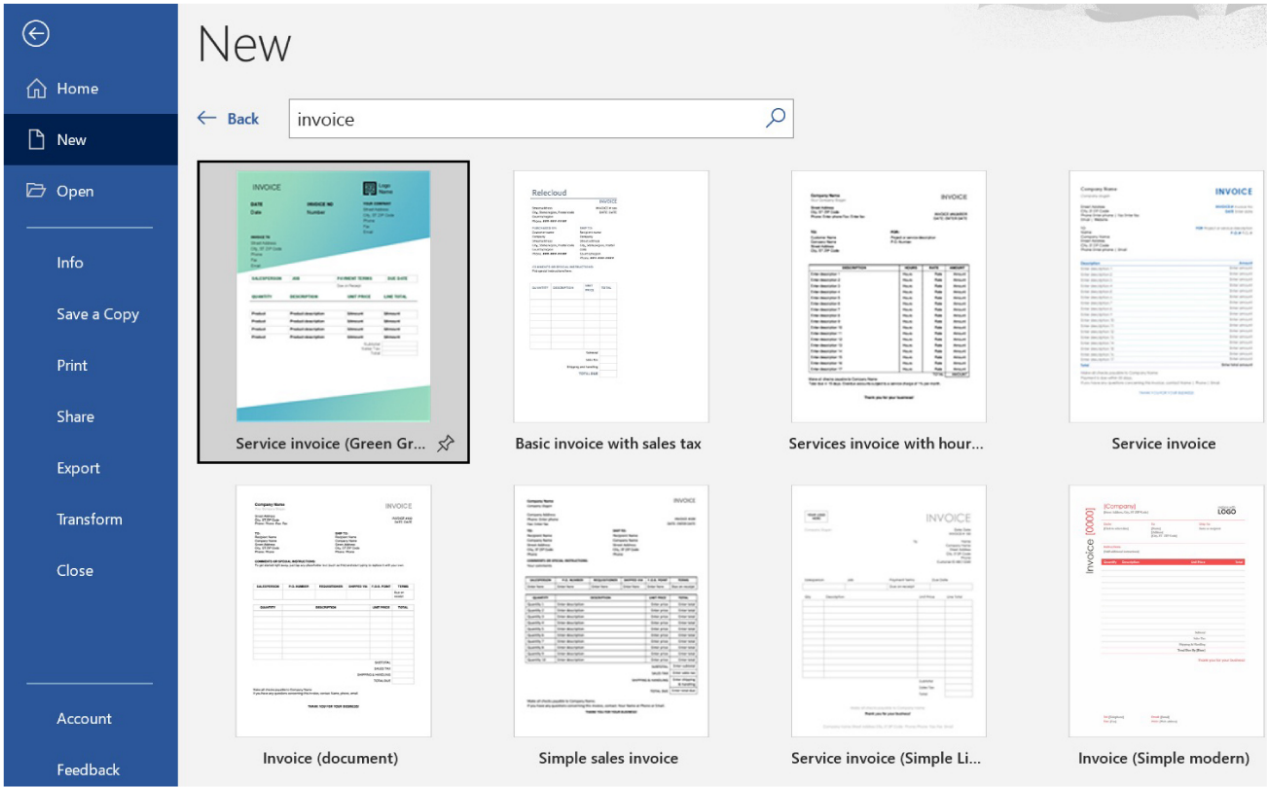


Figure 5.15: Invoices can be customized to include the company logo and include custom fields, such as sales tax or discounts. (Used with permission from Microsoft)

Business Plans

A business plan is a document that describes a company's plan for growth and profitability. Business plans may have different uses and applications depending on the type of business and stage of growth that the business is experiencing. For instance, some start-up business plans are used to seek funding for a venture. They may describe a detailed short-term plan for the company's first few months of activity, then a broader long-term plan for future growth. There are also business plans for established companies, such as capacity-building business plans. These types of plans are used to explain why a company needs funding to buy a new capital asset, such as a manufacturing plant, or to refurbish an existing one. The business plan templates you will find in the Microsoft Office database will give you a head start on designing and formatting your business plan, but keep in mind that these templates will not give any advice on what to include or what kind of language to use in your business plan. For that, you can get some examples of an already-made business plan online. Figure 5.16 shows an example of the first couple of pages of a business plan template in Word.

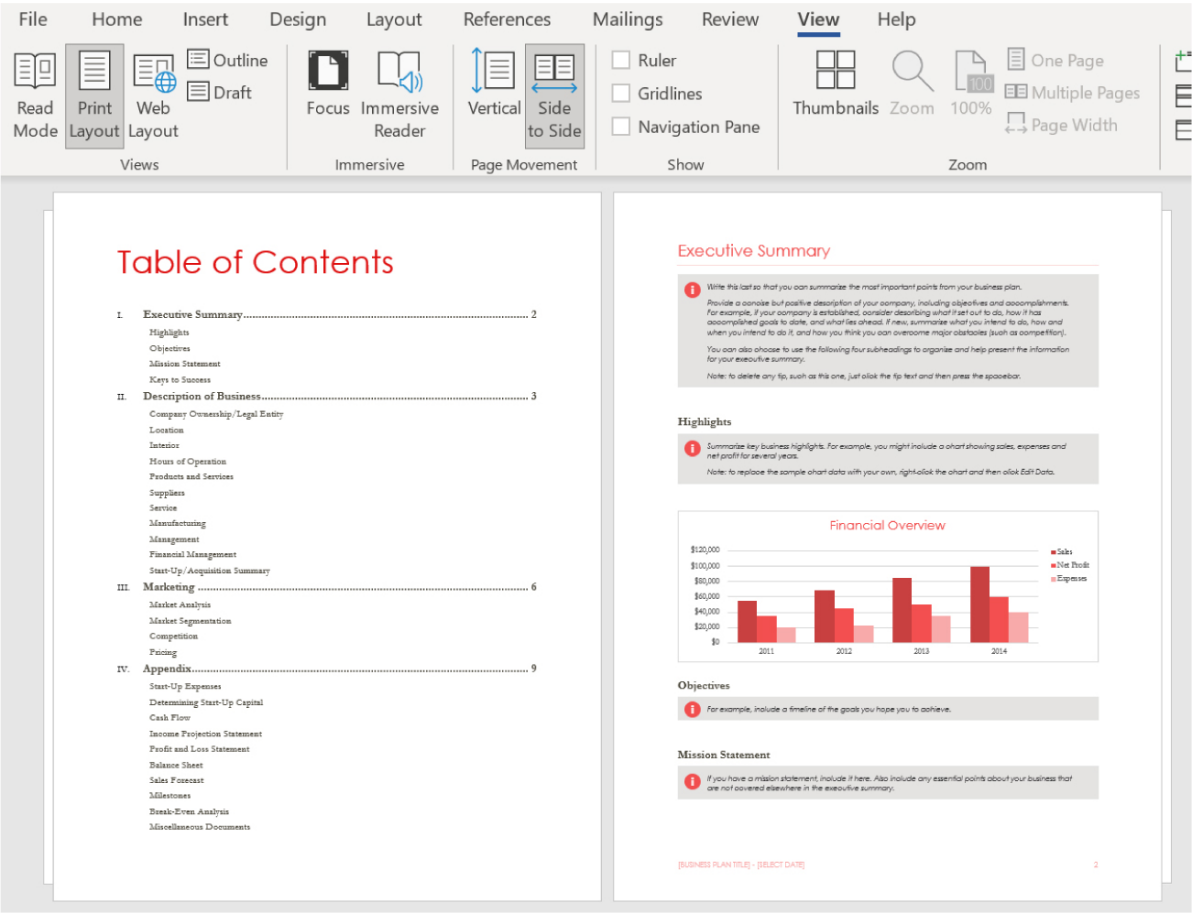


Figure 5.16: The purpose of a business plan is to discuss the road map for opening or expanding a business. (Used with permission from Microsoft)

Résumés and Cover Letters

As you start your career and begin your job search, you will want to present yourself as a serious candidate, ready to take on challenges. One way to put yourself on the right track toward professionalism is by having a résumé. A résumé displays your work experience, academic degrees, and overall skills. Some résumé experts say that you should limit your résumé to one or two pages, but depending on the position, you may want to describe your studies and experience in more detail.

Like business cards, résumés can be simple or more imaginative. While a visual, graphics-heavy résumé may be eye-catching, a plain text document may be more practical. When you apply for a position, you will often be directed to an area of the company's website where you are prompted to upload your résumé to their system. Then, using computer software, they scan the document for critical information such as keywords, years of experience, and skills, and then filter the résumés that meet the desired job requirements. These computer programs do not read drawings and designs well, so a creative or graphics-heavy résumé may not be interpreted well by this technology.

If you need to print your résumé, it is appropriate to add your personal letterhead to the top of the document. While letterheads are often used to present company information, as we learned earlier in the chapter, you can also create a personal letterhead. This type of letterhead is essentially a professional branding of your personal data, displaying your name, position (if applicable), mailing address, email address, and telephone number. It might have a simple graphic design, like a solid color bar, or a more intricate design or logo. Using a consistent letterhead across all your communications will add a look of professionalism and could help increase your job prospects. That consistency confirms to the potential employer your ability to see "the bigger picture" and your ability to visualize the tied-together documents.

Another way to use your personal letterhead is on a cover letter. Cover letters always have a distinct purpose: to present you as a person, and your skills and relevant experience, in a brief manner. Writing a letter on your own personal letterhead shows professionalism, as well as gives the recipient an opportunity to write back or respond. Like a business memo, there is a specific

way to structure a cover letter. It should always include the date, your letterhead, the recipient's address, salutation, complimentary closing, and signature. The body of the cover letter should address these aspects in different paragraphs, usually in this order:

- The introduction: discussion of the job position that is being offered, and your interest in applying.
- The second paragraph: your work history summary. You need to be brief and cover the main points of your career. Also include the relevant skills you possess for the job. If you are applying for a management position, include your management responsibilities in past jobs, for example.
- The third paragraph: description of how you fit the job offered. You might also want to add your overall career objectives here, and explain how this job furthers these.
- The conclusion: a closing paragraph that includes your willingness to be right for the job, and your motivation for applying to this company.

Normally, cover letters are one page, and at most, two pages. You may adjust the mentioned format by adding new paragraphs to add more detail on your work experience and skills.

The templates covered in this section can help you develop your personal letterhead and cover letter. There are several options for résumé and cover letter templates in Word. Figure 5.17 shows a sample cover letter, and Figure 5.18 shows just a few of the options available through Microsoft. As with the other templates, simply replace the generic text in the template with your specific information.



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 5.17: A cover letter is a complement to your résumé and specifically outlines how you are a good fit for the position to which you are applying. (Used with permission from Microsoft)

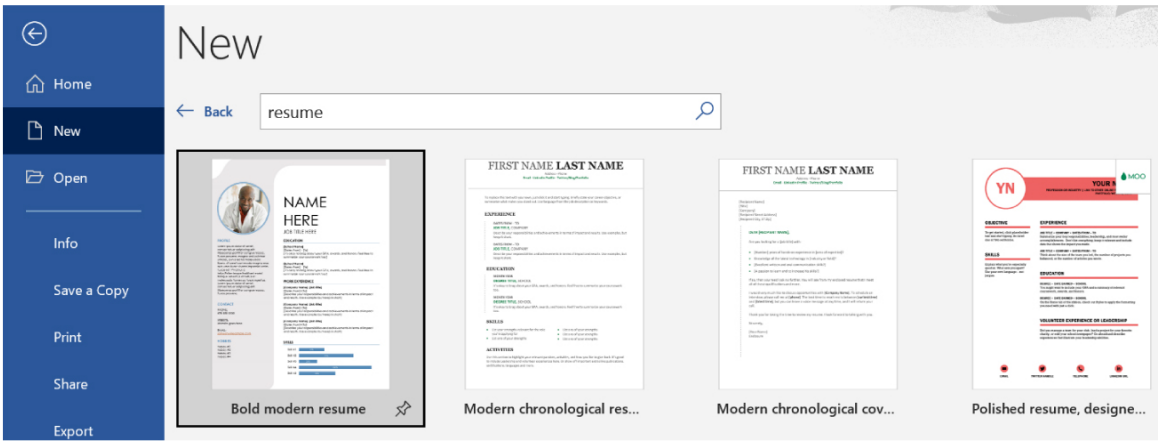


Figure 5.18: Choose a résumé template that not only matches your personality, but also coincides with the type of job you are applying for. (Used with permission from Microsoft)

Real-World Application - Creating Brand "You"

As you grow in your own profession, you might want to consider developing your own brand. This will include how you present yourself on social media, as well as all media and supporting documents you might use to advertise yourself and your "product"—you. Corporations often use brand guidelines to ensure consistency across all brand items, such as business cards, letterhead, envelopes, and logos. Here are logo guidelines from Mitsubishi Motors for example. These guidelines give specific details on how to use, and not use, the company logo in different circumstances.

When developing your own personal brand, consider using the following steps:

1. First, investigate personal brands. Canva offers a guide to personal branding that can help. Seek out individuals who do this well. What elements are they using and why is their strategy effective?
2. Next, design your business card. You might also want to consider developing your own logo; however, there are many free, online resources available that can help you with this. Once you have a business card, design your other stationery.
3. Finally, develop a memo and invoice design from scratch. These will be important as your personal business grows, and you have regular business communication and contracts to support your business.

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2.1.9: Managing Long Documents in Microsoft Word

📌 Click here to view Microsoft Word Building Proficiency Chapter Overview

Learning Objectives

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

- Use the tools in the Pages command group
- Utilize Format Painter to apply formatting in a long document
- Use some of the tools on the References tab
- Create bookmarks for document navigation

Long documents underscore the importance of good navigation tools. Imagine working through a 200-page report, only to have to scroll endlessly through chapter headings to find what you are looking for. This is why tools like cross-references, bookmarks, tables of contents, and tables of figures are so important. They allow you to quickly access different parts of your document, as does the document outline, available in the Navigation pane.

In a business setting, these navigation tools are especially important. Think about your market trends report for WorldCorp. The high-level executives reading your report will need to be able to quickly glance at the table of contents and read a few pages of the report, without having to scroll or flip through many pages of text. In fact, they likely don’t need to read the whole report; they will read the executive summary and skip around the report to graphs that interest them. (The executive summary is a short overview at the beginning of the report that highlights the main points of a long report.)

This section discusses the different command groups and tools that make long documents more user-friendly.

The Pages Command Group

The Pages command group is on the Insert tab, and it contains three commands. The most used one is Page Break; this command allows the user to finish writing on the current page and start writing on a new page. (You can also access many of these same tools on the Layout tab in the Page Setup command group.) Adding a page break can be particularly useful at the end of a chapter or section. To insert a page break, place the cursor where the break will be (the start of the new page), and select the Page Break option. You may also just use the keyboard shortcut Ctrl+Enter to place a page break. If you turn on the ability to view hidden characters, you can see exactly where the page break is on your page (see Figure 4.48). You can also view it easily in the Print layout option on the View tab. Here, we can add a page beak at the end of each major section of the market trends report.

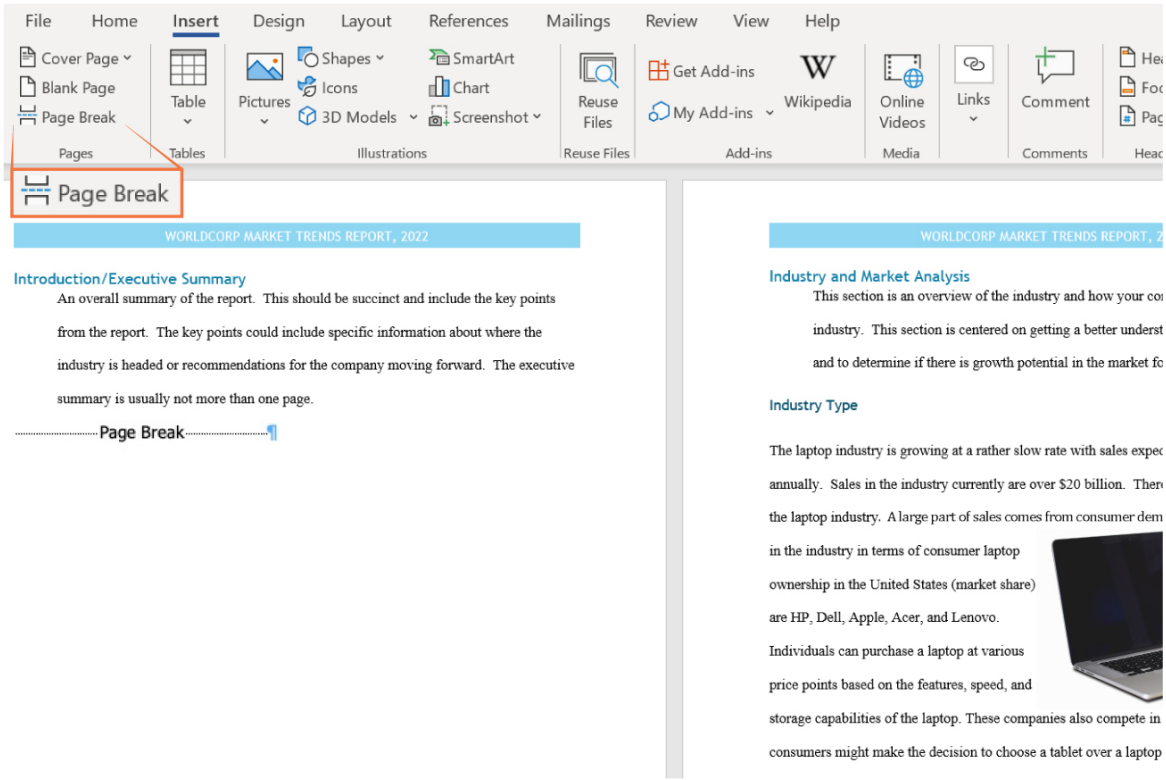


Figure 4.48: Page breaks make the subsequent text start on the next page. Here, it was placed at the end of the Introduction/Executive Summary, so that the Industry and Market Analysis section started on a new page. (Used with permission from Microsoft)

There is another command, Blank Page, which is not as commonly used as Page Break, but can be impactful in long documents such as reports and textbooks. These intentionally blank pages are added to provide a sense of closure or finality before a new chapter or section begins; they make a bigger impact than just a page break because they leave a full page empty. This convention is more often used in the publishing world when needing to, say, start a new chapter on a right-hand page.

To insert a blank page, go through the same steps as inserting a page break: Put the cursor where you want the blank page to be, and select the Blank Page icon.

The last command to discuss in the Pages group is Cover Page. Adding a cover page, or title page, is a common practice for long documents. It is an informative page that contains basic information about the report, such as the title, authors, publishing date, and the department or/and division. Some companies or organizations follow specific guidelines about title pages; formally written reports that follow the *Chicago Manual of Style*, for instance, do not include any graphics, and the components must follow a set alignment and format. Yet many business reports do not strictly follow any set manual of style, or may simply follow their company's brand guidelines. It is appropriate in many business settings to use graphics, such as a logo or photograph, on a title page, as in Figure 4.49.

Insert a title page to your market trends report. To insert a title page, select the drop-down menu of the Cover Page command, and choose a design. Word offers many different options for layouts, fonts, colors, and styles. Just update the text and add an image, if applicable.

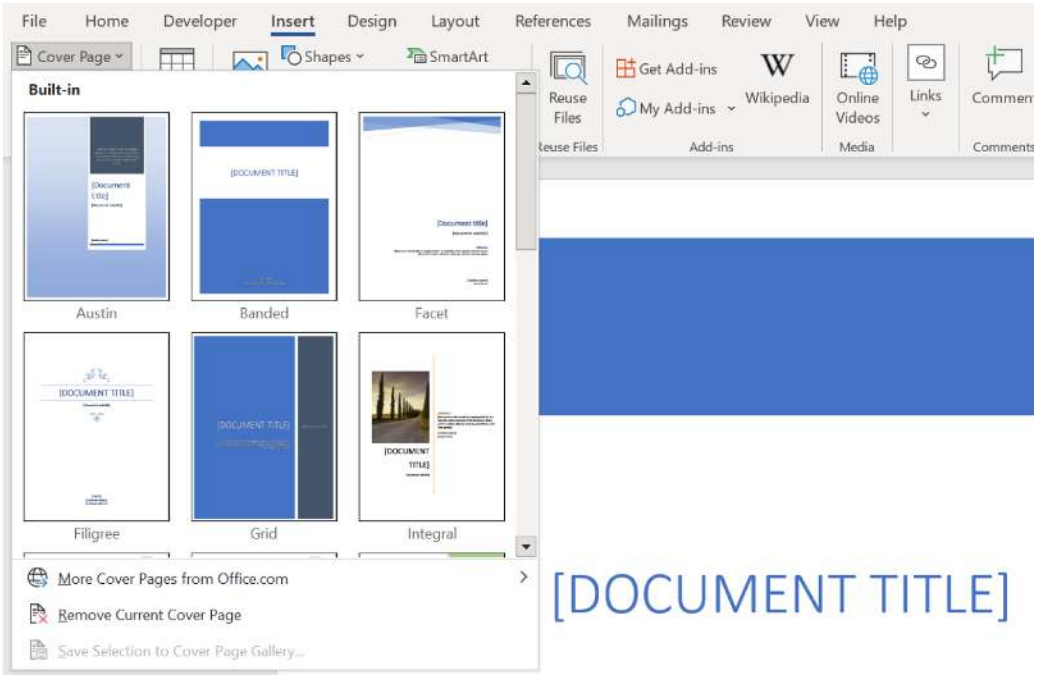


Figure 4.49: Word comes with some built-in styles and layouts for cover pages, some of which include spaces for graphics. (Used with permission from Microsoft)

Format Painter

Another tool in Word that helps manage long documents is the Format Painter. Format Painter is a command on the Home tab. It is used to copy formatting from another document or section of the same document. This can be useful when you have formatting in one section of the document that you want to copy over to another section, saving you the time and effort of having to format the new document or section again manually.

To use the Format Painter, select the area of the document from which you want to copy the formatting, then choose the Format Painter command. If you single-click the Format Painter, it will only allow it to be used once. To use it multiple times, double-click the Format Painter. It can then be used until you click the Format Painter icon again or press the Esc key. The mouse pointer will change to a little brush, then with the brush, you select all the areas you want to apply the formatting to. Word will automatically mirror and apply the new formatting. If the document has a lot of chapters, if the document outline is multilevel, or if there is a lot of different elements in the previous document, then the Format Painter will not work perfectly. You might need to fix some pages or areas of the newer document. For example, when you have bullets, the Format Painter will not copy over the bullets, but instead will only copy the formatting of the text.

Format Painter is a useful tool for when you want a whole document to have the same formatting, particularly if that document contains copied and pasted text from multiple sources or collaborators. In Figure 4.50, we selected a phrase from the first paragraph, then chose Format Painter and used the brush to select the entire target paragraph. As you can see, the selected text now has matching formatting to the header.

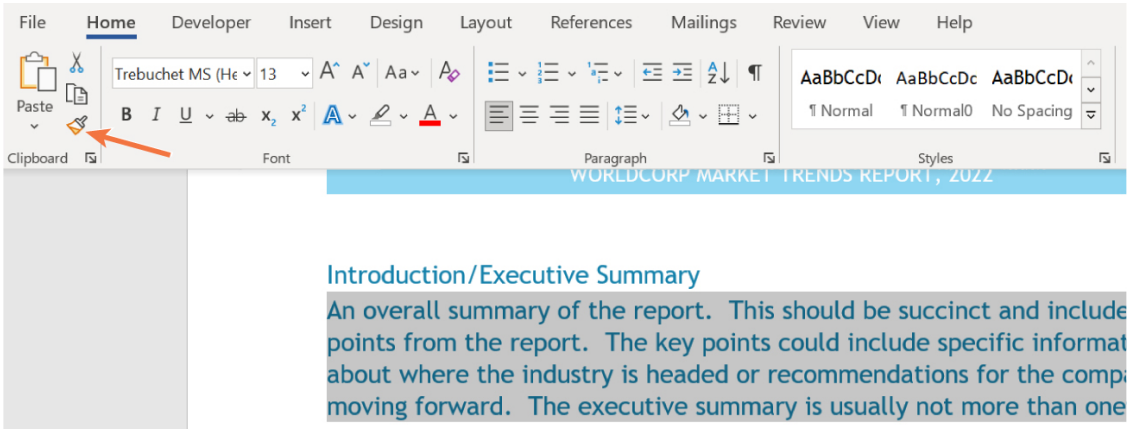


Figure 4.50: The Format Painter is useful for applying multiple types of formatting to a single chunk of text. (Used with permission from Microsoft)

References Tab

The References tab is for working with citations and the front/back matter of books. This is an important tab for anyone who is creating a document with many sources, such as a journal article or economic report. It is also helpful when dealing with long documents that include many sections such as the market trends report. Managing a table of contents, a citation list, or a bibliography manually can be unwieldy, and, fortunately, Word provides lots of tools to help users keep these organized and looking professional.

Let's review the different command groups on this tab. The first command group is the Table of Contents group. This contains tools for helping the user insert or modify a table of contents. The Footnotes command group is for managing and inserting footnotes and endnotes. The Research command group has two useful tools. The Search tool can be used to find information, definitions, and images online. The Researcher tool allows you to search for sources for information contained in the document. You can then insert the citation or link to the source using the tool. You simply click on the Research tool and type the search term or phrase into the navigation window. The Citations & Bibliography command group is for inserting, formatting, and managing your references. The Captions command group is for when you are working with figures and tables and want to add captions to later create a summary of the figures in your document. The Index command group is for building an index, like what you would find at the end of a textbook. The Table of Authorities is a command group that lawyers use when they need to cite cases and statutes. This next section walks through some of the commands you might find most helpful in this tab.

Table of Contents

If your document is formatted properly, Word will automatically generate a table of contents for you. You can select from a few different styles, which is useful for ensuring that your table of contents matches the look and feel of the rest of your document. Let's examine the requirements for a table of contents and what you need to have in your document to create a good one.

Headings for Tables of Contents

In the Creating and Working in Documents chapter, we discussed how to insert headings and why these are important for navigating long documents. We also mentioned how to access your document outline in the Navigation Pane. Recall that as you insert different levels of headings (H1, H2, H3, etc.), the Navigation Pane will read the document automatically and display them for you in the form of a document outline. This is particularly useful for long documents, as you can see the outline of the entire document without having to scroll all the way through hundreds of pages of text.

The reason these headings are relevant to generating a table of contents is that the table of contents uses the headings in the same way as the document outline. When you set up your H1s, H2s, and H3s, Word will automatically use those to generate a multilevel table of contents.

Section Breaks for Tables of Contents

In the chapter on Creating and Working in Documents, we also briefly reviewed how to insert section breaks and why they are important. Recall that there are two types of section breaks: continuous section breaks and page breaks. Continuous section breaks

are used when you want a new section but want to remain on the same page. They can also be used if you want to have different margins on two different areas of the same page, or to add columns for one section of the text. Page breaks, however, begin a new section on the next page. These do everything the continuous section break does, but simply adds a new page. These are useful for when you want to start a new chapter, for example.

Both types of section breaks are important for generating your table of contents. When you create a table of contents in Word, the program automatically generates page numbers based on the page numbers in your sections. You may have continuous page numbering throughout your document, and so in this case, the table of contents will not be concerned with your sections. However, if there is different page numbering in different sections, the table of contents will reflect this.

Inserting a Table of Contents

You need to have added your headings and sections for the table of contents to work. In the market trends report, we formatted the headings for each major section and the subsections in those sections. Recall the headings were formatted using the Style command group on the Home tab. To insert a table of contents using the headings we have defined, go to the first page of the first section. For the report, we want to include the table of contents after the cover page. So we will go to the Introduction/Executive Summary heading. Leave a blank line before the section heading by pressing Enter to move the first section downward as least one line, as shown in Figure 4.51. This will determine the placement of the table of contents. It should appear before the actual report starts, so before the first section of the document. Now, go to the References tab, choose the drop-down menu called Table of Contents, and choose any of the preset formats. Choose Automatic Table 2 for the market trends report; it will look like Figure 4.52. Conveniently, the table of contents has clickable hyperlinks by default, meaning that you can press Ctrl on the keyboard while clicking the mouse on any part of the table of contents and it will take you to that part of the document.

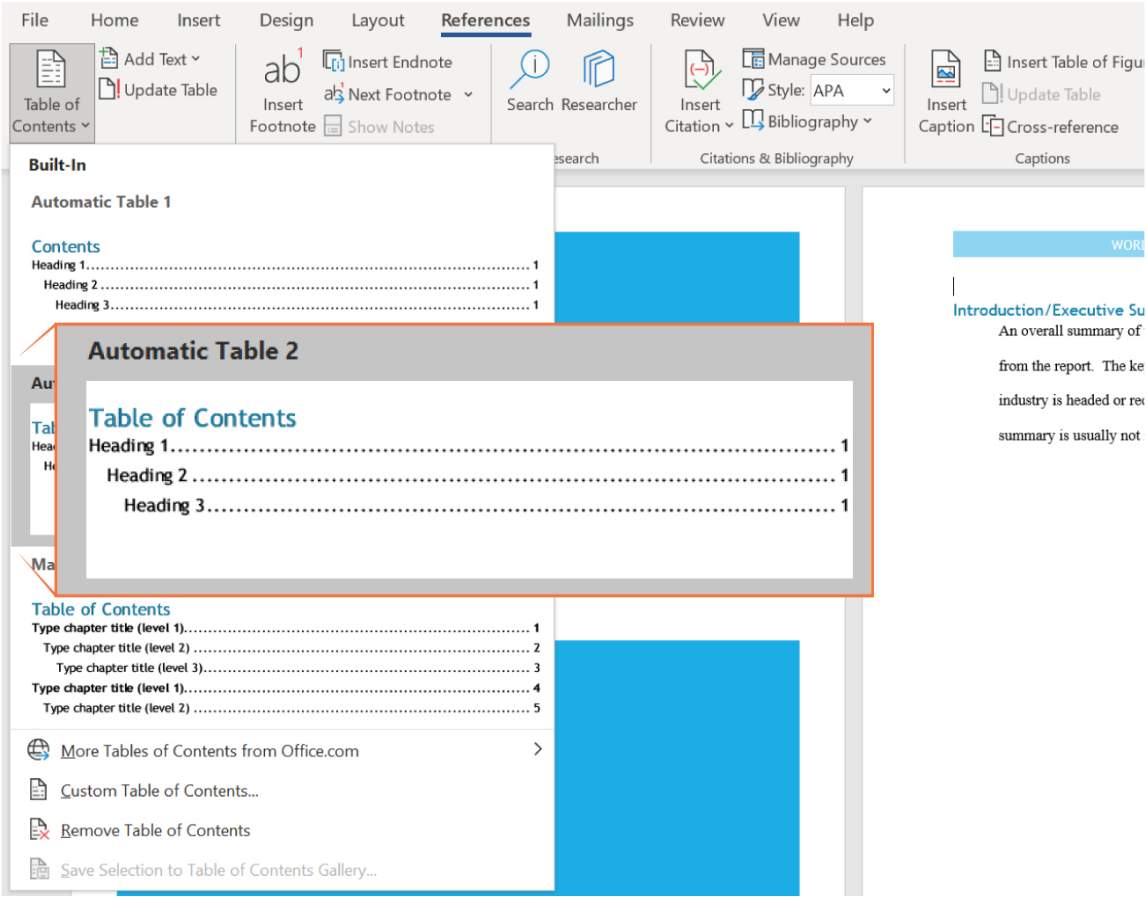


Figure 4.51: Creating a hyperlinked table of contents in Word allows the reader to click right to each section, directly from the table of contents. (Used with permission from Microsoft)

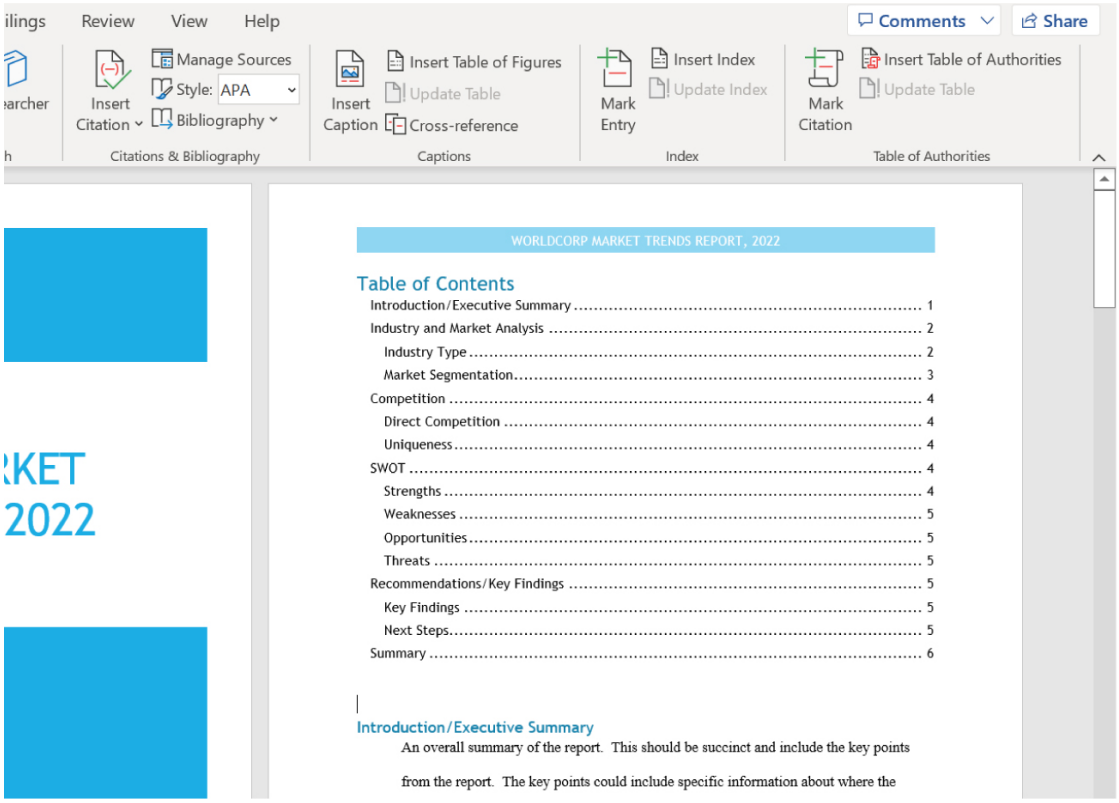


Figure 4.52: The table of contents is arranged using the headings we defined when composing the document. (Used with permission from Microsoft)

Note that any time you update your document, and add or delete any headings, you will also need to update your table of contents. You can do this simply by putting your cursor anywhere on the table of contents and selecting the Update Table button. This will automatically update your headings and page numbers.

Footnotes and Endnotes

A footnote is a way to add notes to a document, and/or a way to cite a reference. A footnote appears at the bottom of the page where the reference occurs. When you add a footnote, a small superscript number or symbol will appear above your text, and then the footnote will automatically be added to the bottom of the page. This is an easy way to add a reference to a source or other general notes. For example, the author may want to add a related thought or comment about the text and have it appear at the bottom of the page in the form of a footnote, so that the reader can quickly and easily read it.

An endnote is similar to a footnote, except that the note appears on a page at the end of the document. Endnotes are typically part of the back matter. They are useful for when you want to have all of your references and comments in one place. However, having them at the end of the document makes it harder for the reader to read them in the moment.

To insert a footnote or endnote, place your cursor at the end of a sentence, and choose the Insert Footnote or Insert Endnote command on the References tab. Word will automatically take you to the bottom of the page (for a footnote) or the end of the document (for an endnote) and add a short line to indicate where the footnote/endnote space will be.

For the market trends report, we need to add a footnote to provide the reference for the information about laptop sales in the industry. We will place the cursor at the end of the sentence (at the end of the word “billion”) as the place where the footnote notation will be inserted (Figure 4.53). The actual footnote will be inserted at the bottom of the page as a blank footnote. You can then insert the appropriate citation for the footnote. In this case, the website for the reference was copied and pasted into the footnote (Figure 4.54). To format the text in the footnote, click on it twice, and the whole line will be selected, then right-click on it and select Style. You can change the font type if you click on Modify. You can further change the footnote type, as there are many standard layouts of how to present a footnote, as Figure 4.55 shows. Enter the citation/text for the footnote.

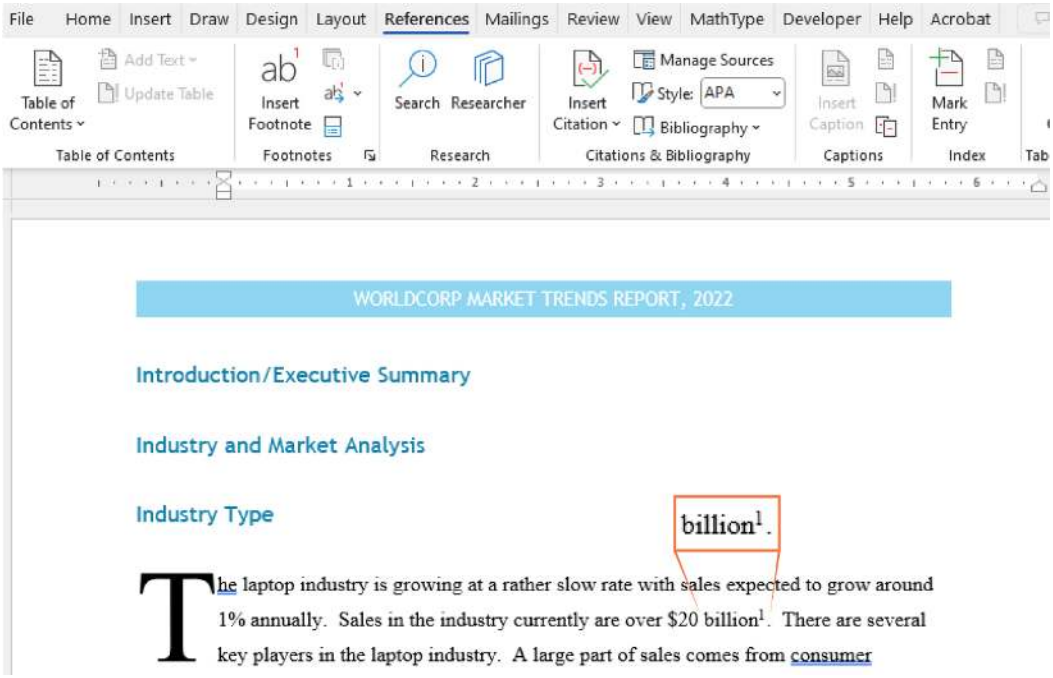


Figure 4.53: The superscript "1" indicates that there is a footnote at the bottom of the page. (Used with permission from Microsoft)

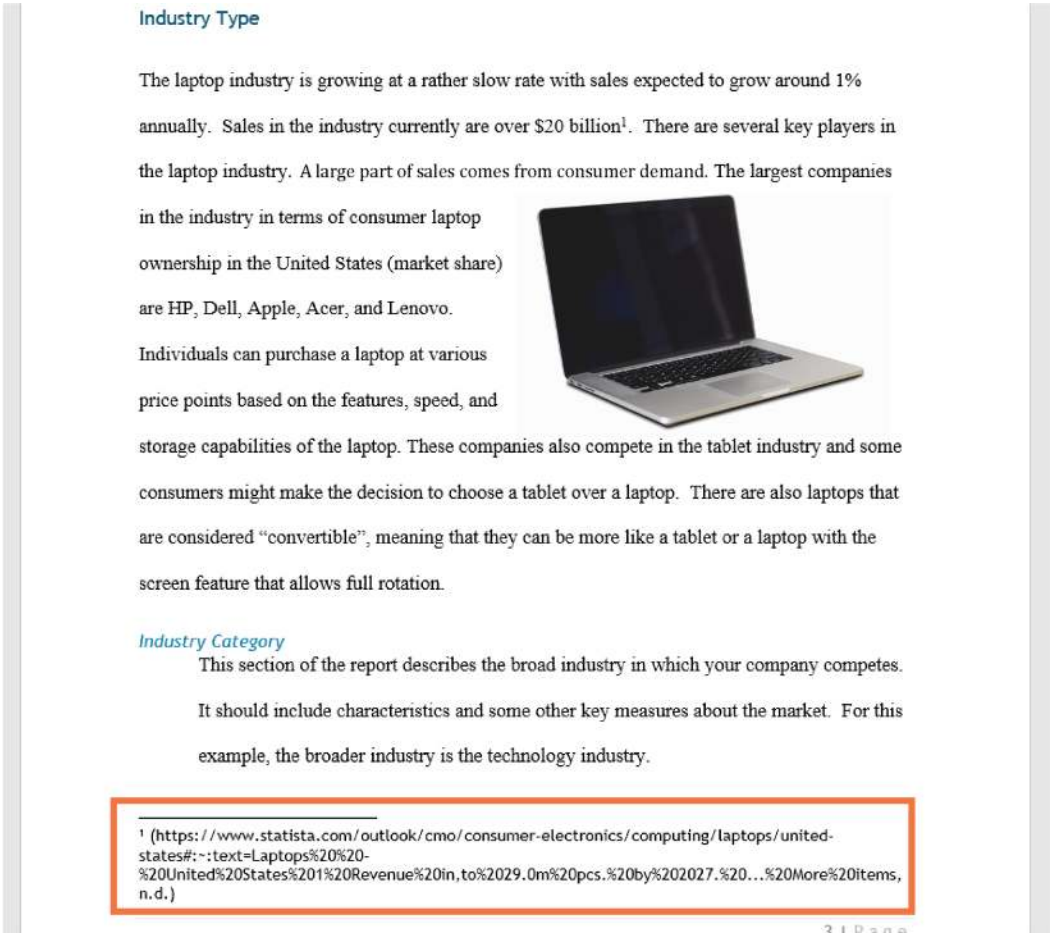


Figure 4.54: Footnotes will be numbered in the body of the document and numbered at the bottom of the page where the footnote is inserted. Include the citation for the reference in the footnote. (Used with permission from Microsoft)

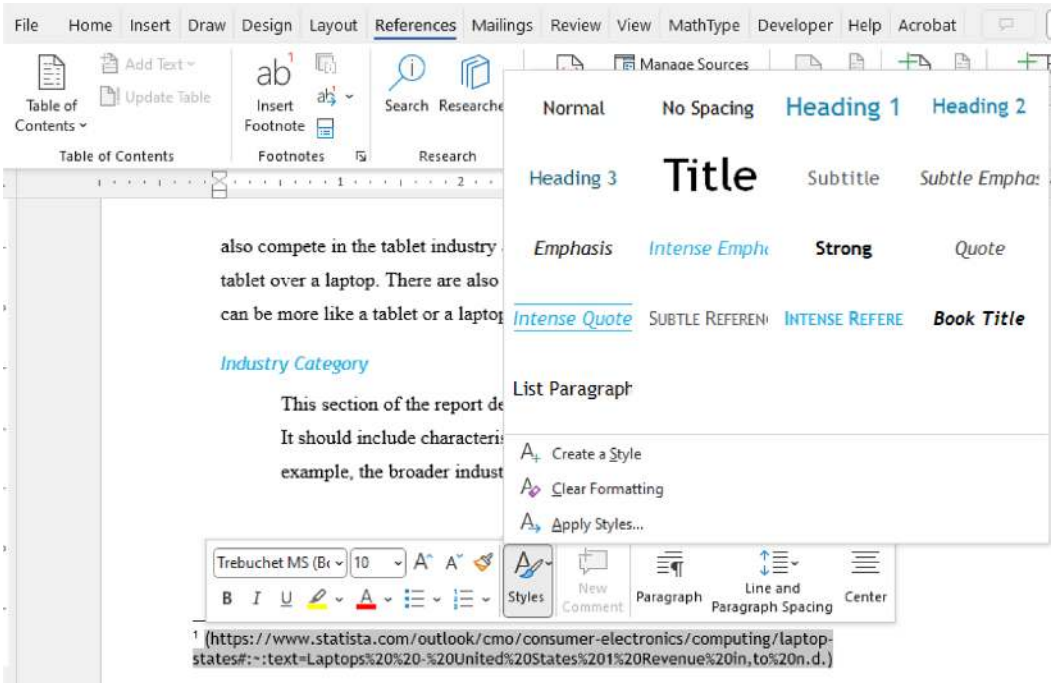


Figure 4.55: The style of the footnote font can be formatted using a wide variety of built-in styles. (Used with permission from Microsoft)

An endnote will look exactly the same as a footnote. The only difference is that it is at the end of the document instead of at the bottom of the page. For the market trends report, we could use endnotes to identify the departments that contributed the specific information in the sections or to add additional context to a statement in the report.

For both footnotes and endnotes, you have the option of changing the numbering system. Word will automatically use numbers (for footnotes) or Roman numerals (for endnotes), but you can change this. Double-click to select the endnote or footnote, then right-click it to activate the context menu, and select Note Options where you can change the numbering format. If you want to change the font or layout, select Style from the context menu.

Table of Figures

A table of figures is similar to a table of contents, except that instead of listing your document's headings and section breaks, it lists the captioned figures, such as tables and images. This is useful in documents with a lot of statistical analyses, for instance, in which readers will need to easily and quickly find specific graphs or charts. It can also be useful in documents like business reports, where you might want to have a list of the different data tables. Like a table of contents, there are a few requirements that must be met before the table of figures can be generated.

Captions

For Word to automatically generate your table of figures, you need to insert captions for each of them. Let's first insert a summary chart of data using the skills learned earlier in the chapter into the market trends report. To "caption" a figure, select the entire figure, then choose Insert Caption (see Figure 4.56). In the dialog box that appears (see Figure 4.57), the caption is automatically generated to be "Figure 1," but you can rename it to whatever you like. There are also options where you can choose the placement of the caption. Do the same for all the figures in your document. Once all your figures are captioned, then you can insert your table of figures.

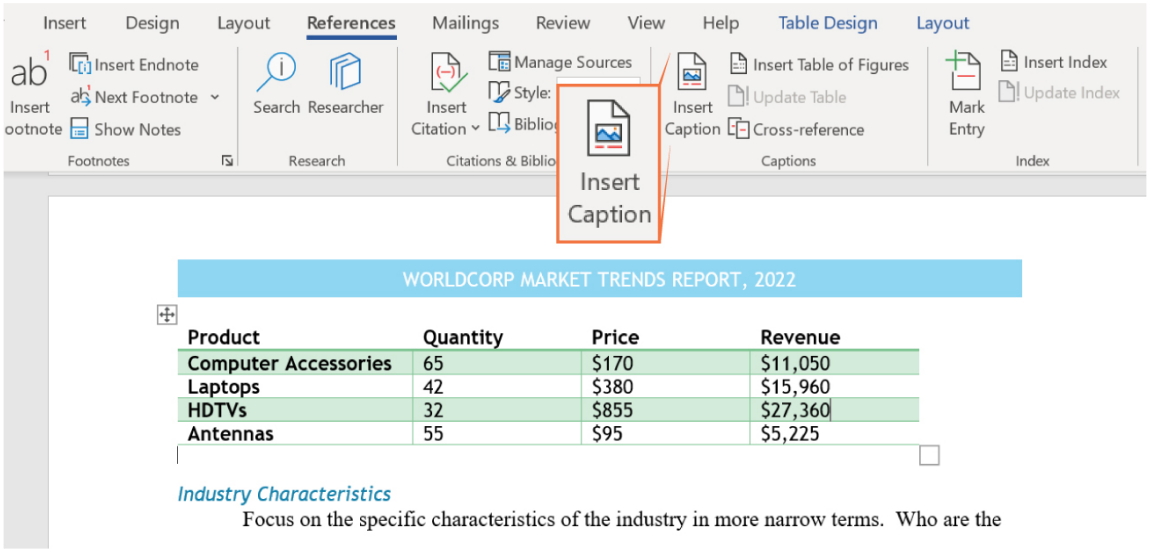
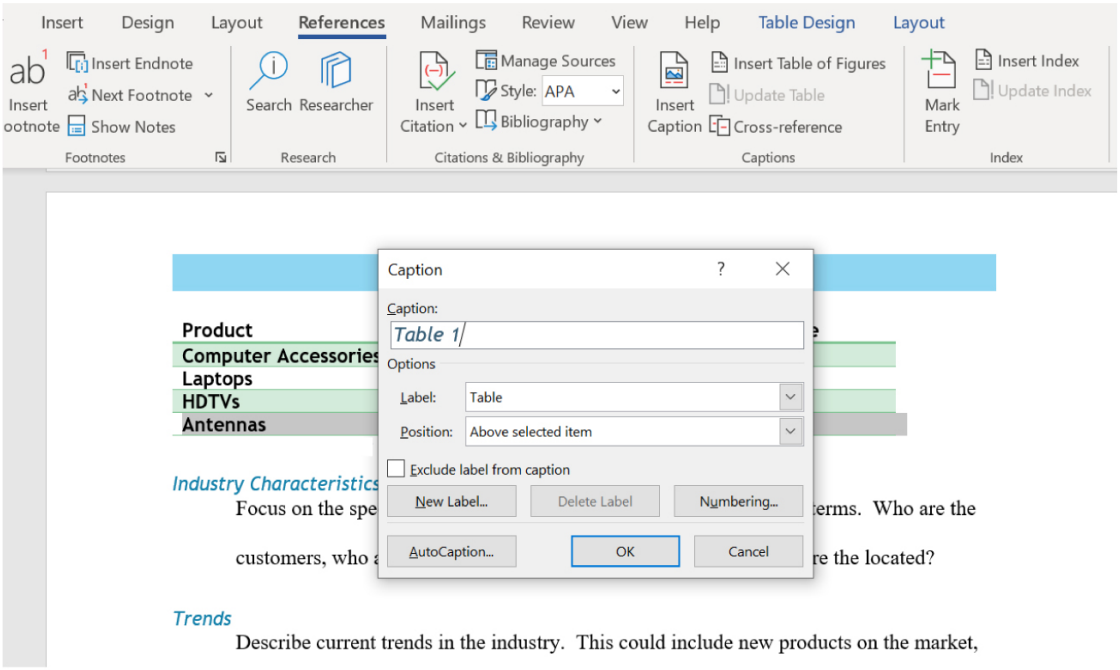


Figure 4.56: You must use the Insert Caption tool to make sure all of your captions will appear in the table of figures. (Used with permission from Microsoft)

https://workforce.libretexts.org/@go/page/62443



(a)



(b)

Figure 4.57: (a) You can use the default text for captions or type in your own information. (b) The caption is placed below the table in this example, and is formatted according to the Style formatting used for the rest of the document. (Used with permission from Microsoft)

Inserting a Table of Figures

As with inserting a table of contents, first go to the top of your document where you will want your table of figures to appear. Typically, a table of figures is placed right below the table of contents. Now that we have labeled our table with a caption, we can create a table of figures to see how it works. As seen in Figure 4.58, insert a page break, and choose the Insert a Table of Figures command from the References tab. Word will automatically "read" the existing captions, and a table of figures will be generated.

To make your document neat and organized, add the title Table of Figures on top, and insert another page break to separate the Table of Figures page from the beginning of the document.

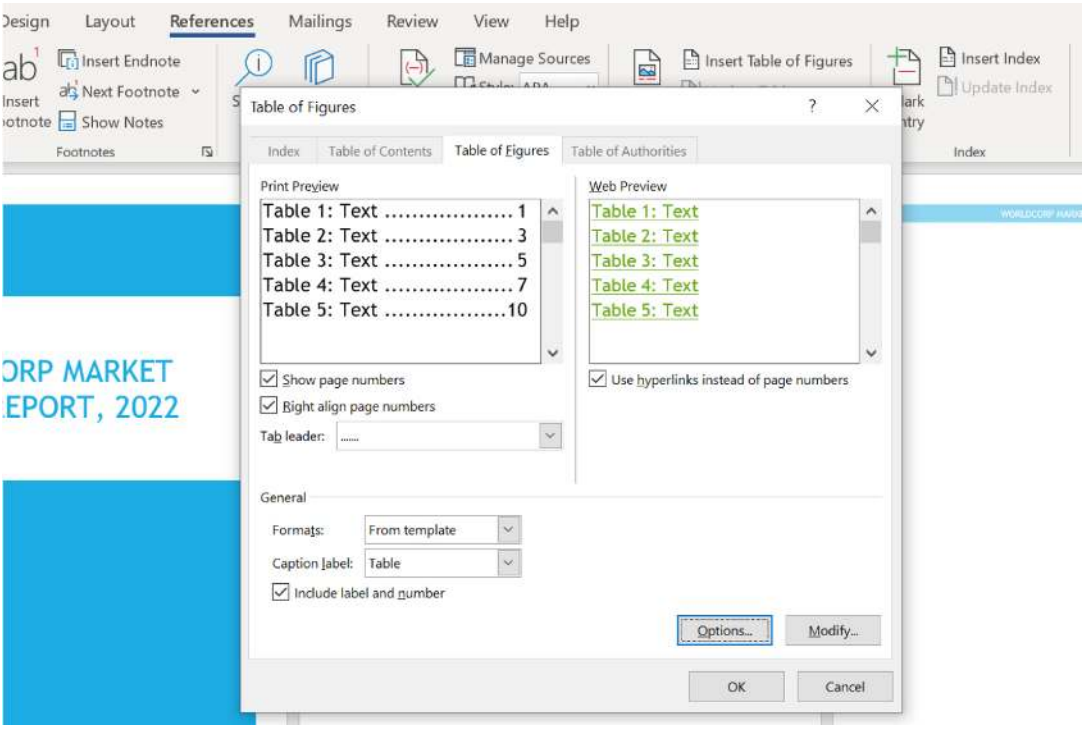


Figure 4.58: You can change some formatting options when you choose Insert Table of Figures. (Used with permission from Microsoft)

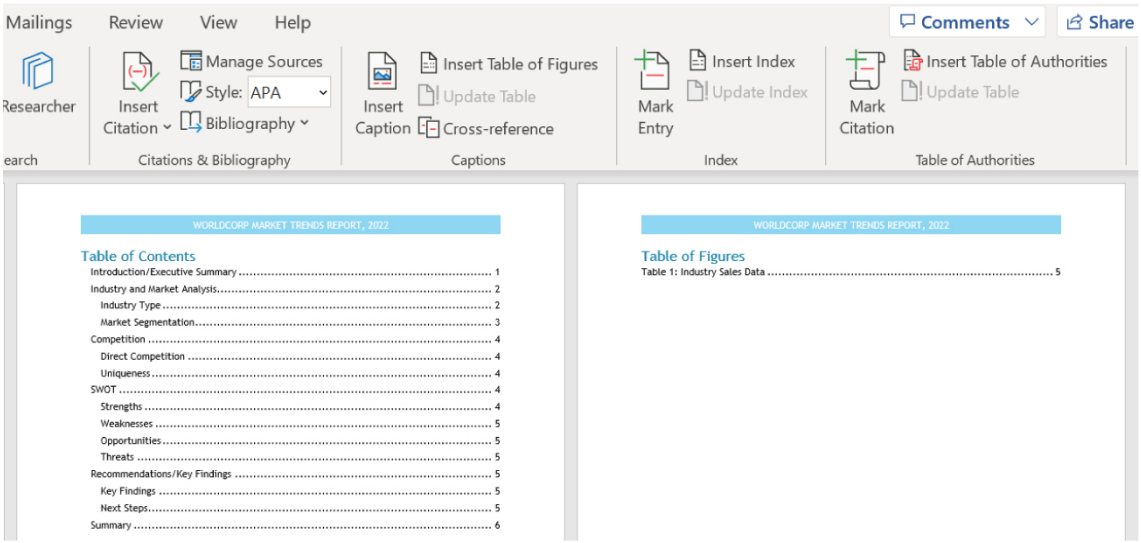


Figure 4.59: The table of figures should look similar to a table of contents, but without the multilevel tiers. (Used with permission from Microsoft)

Linked Bookmarks

Another helpful tool for navigating long documents is the bookmark. You can add bookmark links throughout your document for better navigation. Place the cursor where you want the bookmark to link up to—a section header, for example, or the beginning of an important paragraph—and go to the Insert tab and click Bookmark. In the dialog box, type a name for your bookmark Figure 4.60. In this case, we chose to bookmark the start of the body text. Now, select a word that will link up to the bookmark, right-click on it, and select Hyperlink from the context menu. The same hyperlink dialog box will appear, but this time select Place in This Document. Click on the bookmark you just made, and then click OK; the link will be set Figure 4.61. Conversely, if you want to remove a bookmark from Word, click the Bookmark command in the Insert menu, locate it, and then select Delete.

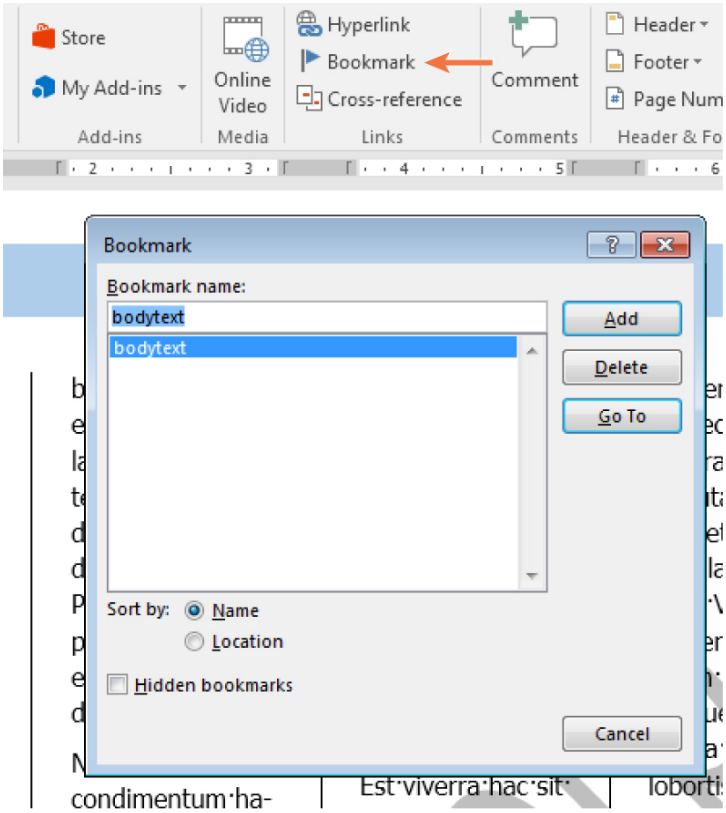


Figure 4.60: When creating Bookmarks, make sure to choose a descriptor word that has meaning to the content you are designating. (Used with permission from Microsoft)

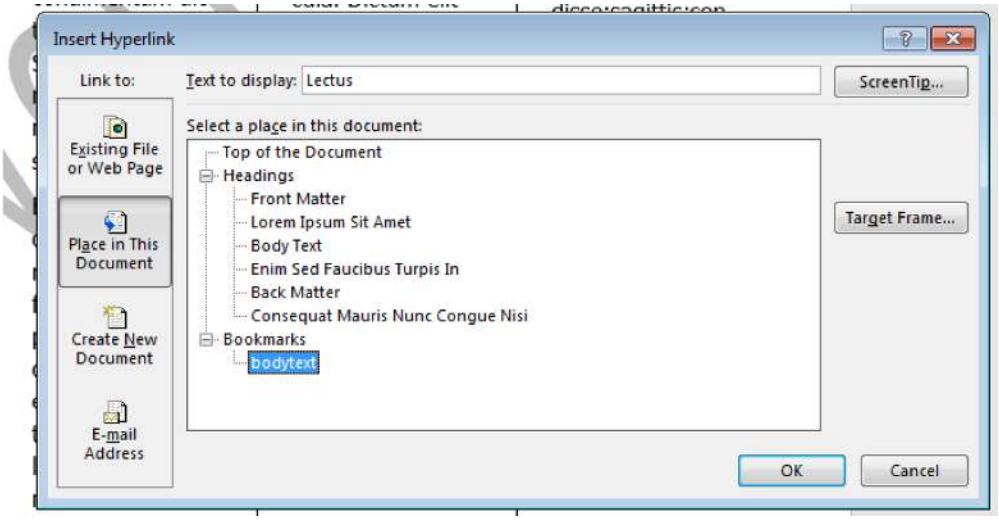


Figure 4.61: The bookmark is now set. Linking a section of text to a bookmark eases navigation through a long document. (Used with permission from Microsoft)

Another reason to use bookmarks is to help digital readers of your document navigate back to important sections of the document while they read. For example, you can add a link at the end of each chapter that says, “Go to Table of Contents.” To do this, first place a bookmark in front of the table of contents as Figure 4.62 shows. To locate the roster of bookmarks, click the Bookmark command on the Insert tab, and then click Go to. If you want to relocate the bookmark, place the cursor where you want the bookmark to be relocated to, then open the Bookmark dialog box, click the original bookmark’s name, and then click Add. This will update the new location.

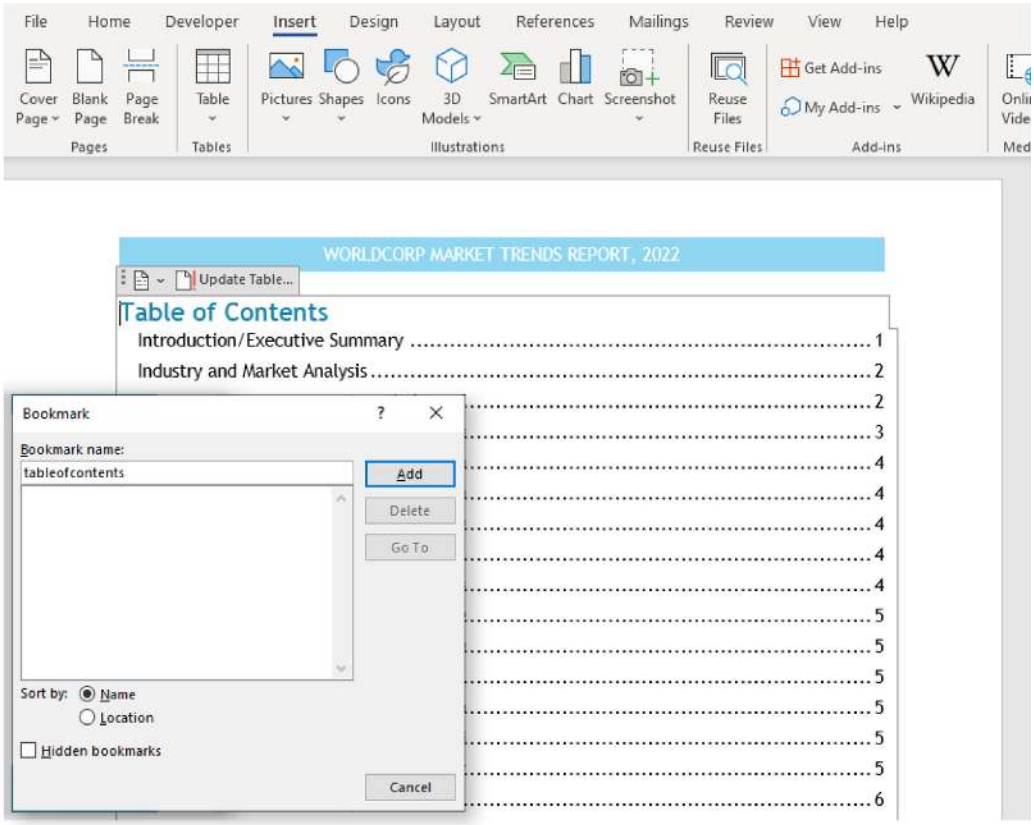


Figure 4.62: When you create the bookmark at the table of contents, you will be able to see it in your roster of bookmarks. (Used with permission from Microsoft)

Next, move to the area of the document where you want to link the table of contents. Go to the Insert tab and select Link. From the Insert Link window, choose the bookmark you just created. In the text box that appears, write the text you want readers to see ("Go to Table of Contents"), then choose Place in this Document as shown in Figure 4.63 and Figure 4.64. Choose the placement in the document and click OK.

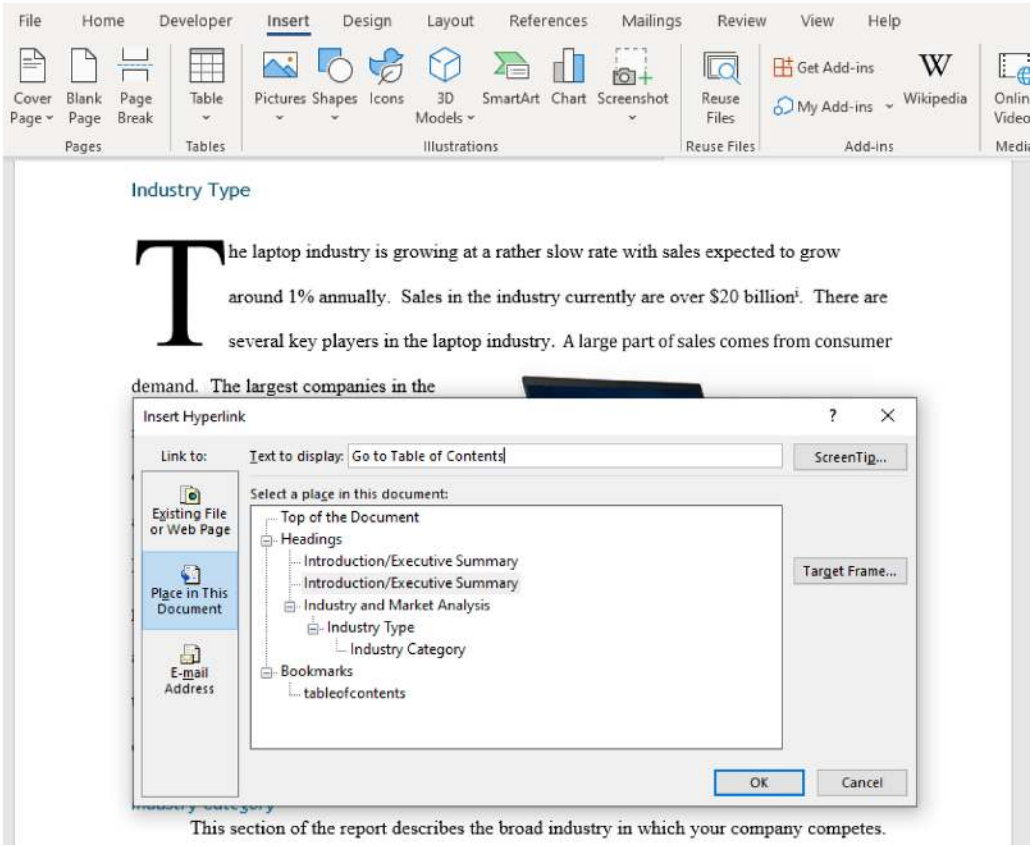


Figure 4.63: Remember to name your hyperlink something that will be helpful to the reader. (Used with permission from Microsoft)

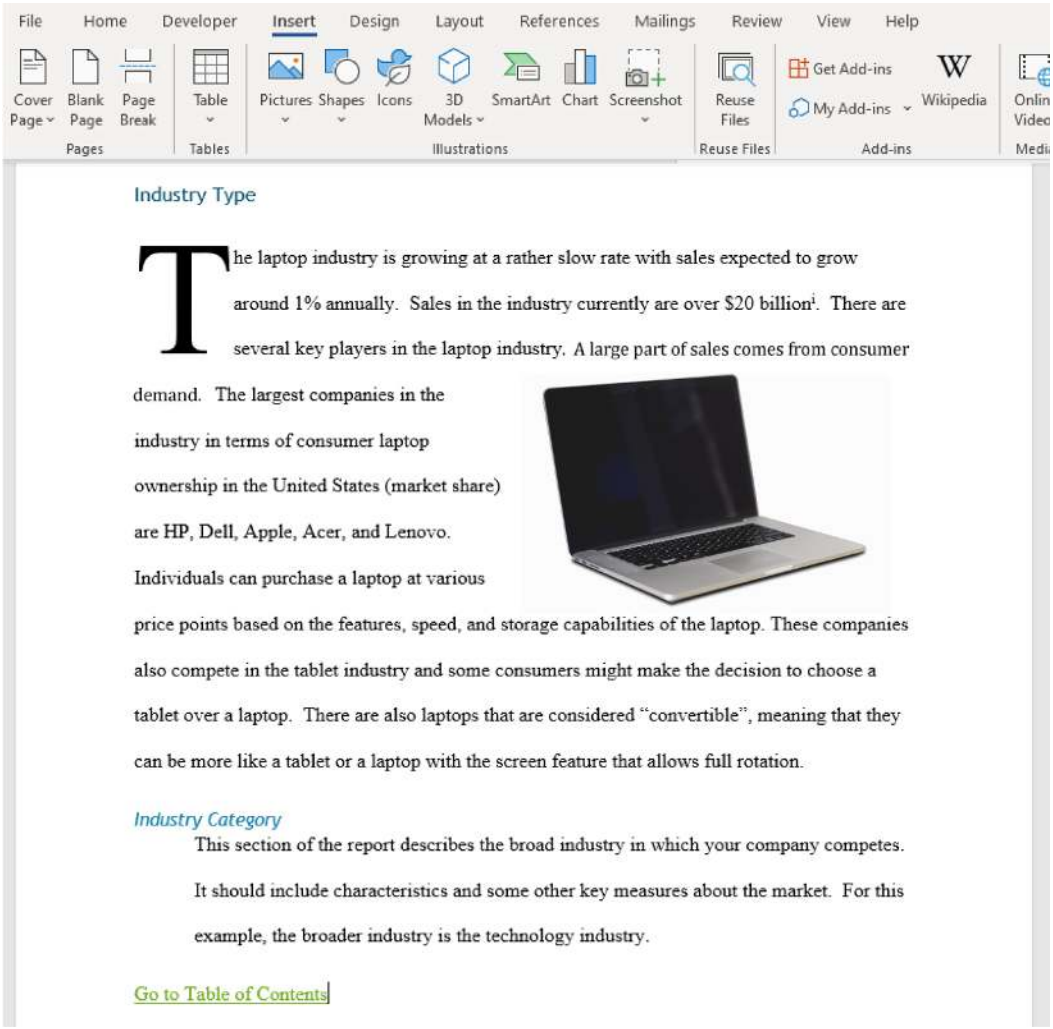


Figure 4.64: Readers can simply click on the inserted hyperlink to go straight to the table of contents. (Used with permission from Microsoft)

Spotlight on Ethics: Academic Integrity

When you are creating documents, especially long documents that might include research or data that has been created by others, it is essential that you give proper credit. You might have encountered citing sources when completing a research report for a class. We have an ethical obligation to cite sources to acknowledge the work of researchers and their findings from the studies. If proper citation is not given to material that is not your own, this is called plagiarism. Plagiarism is part of a broader category called "academic integrity." Academic integrity goes beyond giving credit for work that is not your own, but it also covers issues such as cheating on a test or paying to have someone create a research report for you.

This is not to say that we cannot use information from others to support our thoughts or to help us develop a new understanding of the material. Instead, it means we have to acknowledge that the information came from another source and we are using their research in our work. From the researcher's standpoint, a measure of the quality of the research is the number of times the work is cited by others. This is similar to a product online having a large number of five-star reviews. The more the research is cited by others, the higher the credibility of the information.

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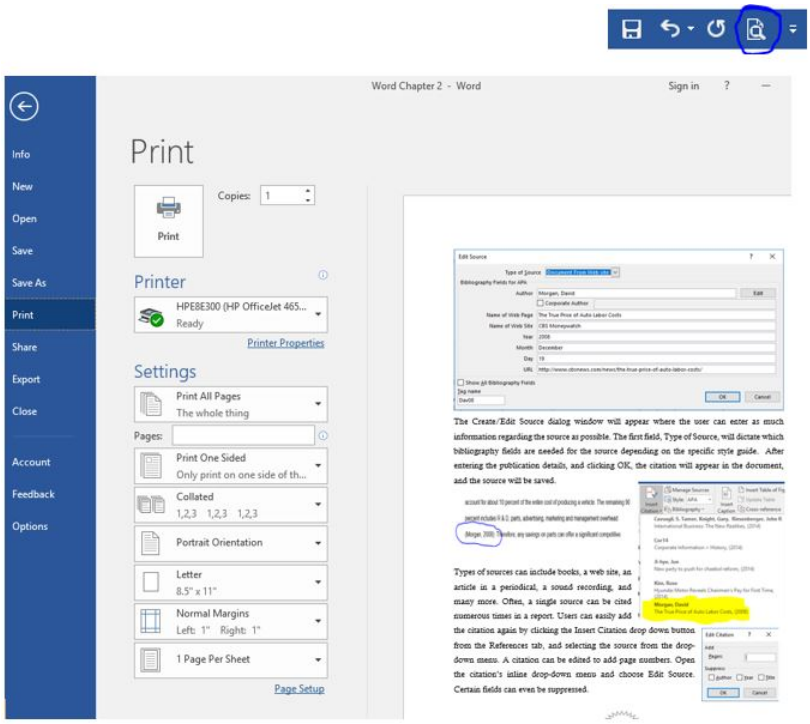
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2.1.10: Printing and Saving Files in Alternative File Formats

📌 Click here to view Microsoft Word Building Proficiency Chapter Overview

Before printing a document, it is a good idea to preview the document and specify which pages should print. The preview might help the user discover some layout issues that can be addressed before wasting ink/toner and paper. The Print Preview window can be accessed in Backstage view by clicking File > Print. It is also a popular idea to add the Print Preview command to the Quick Access toolbar if it doesn't already exist.

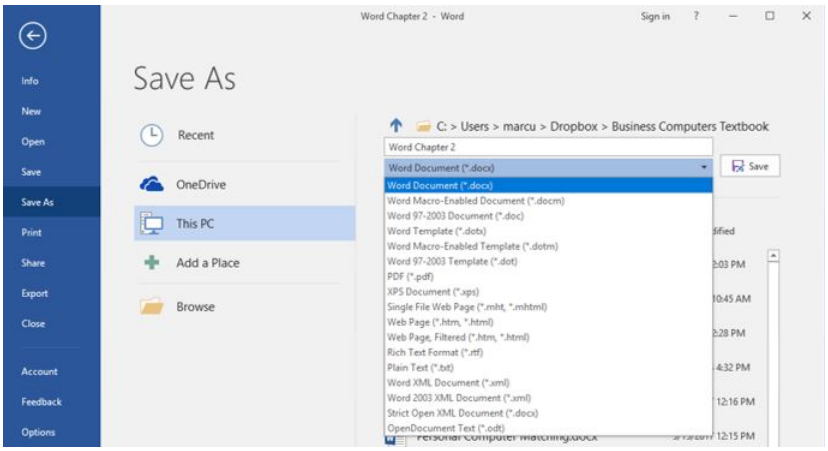


Print Preview

Numerous options can be defined in Backstage view, such as which printer, how many copies, which pages, etc. Once these decisions are made, pressing the big Print button in the top left of the window, will send the data to the selected printer. The back button will exit Print Preview.

If printing a hard copy is not desired, saving the file is the obvious alternative. The way that the user saves a document and the format that they save it in depends on how they plan to use the document. While choosing Save from the File menu will resave the file in its existing format, choosing the Save As command (F12) provides numerous alternatives.

The first option available by using the Save As dialog window, is the ability to choose an alternative storage destination versus the existing location. Alternate storage destinations include a different file folder on the user's hard drive, a portable file storage location, such a USB drive device, or a cloud-based storage location. OneDrive is Microsoft's cloud-based storage option, but other cloud-based solutions, such as Dropbox, exist as well. Cloud computing requires Internet-connectivity to access the current versions of the files. An alternative file format is another option to consider from the Save As window. Choosing the drop-down list to the left of the Save button displays a list of alternative file formats.



Save As Word

One of the most common alternative file formats is a PDF (Portable Document Format) file. PDFs are popular formats to share with non-Microsoft Office users, commercial printers, and users for whom the document is not to be edited. The PDF format looks the same on most computers, has a smaller file size, and preserves most formatting characteristics of the source document. The only software that is required to read or print a PDF file is Adobe Reader, which is available as a free download from Adobe's web site. While prevention of editing was a key feature of PDF files, the current version of Word can actually edit PDF files, however, the edits are traceable.

The other common file format is saving a file to be viewed on a web site or simply in a web browser. Saving a file as a Single File Web Page is the optimal approach to allow users to open the document using a web browser. The file extension of a single file web page is .MHT. Other occasionally used file formats include: .XPS, .ODT, and RTF.

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CHAPTER OVERVIEW

3: Microsoft Word Overview and Emerging Features



Microsoft Word Overview and Emerging Features

These sections focus on advanced tools and modern features in Microsoft Word, including the use of artificial intelligence to improve productivity and writing. They cover helpful tools like Focus Mode and templates, as well as techniques such as mail merge for creating personalized documents and building fillable forms. The content also highlights collaboration features like comments, Track Changes, and version history for teamwork and editing, along with real-world uses of Word and Excel and key terminology. Overall, the focus is on using Word efficiently, working collaboratively, and applying technology like AI to create high-quality documents.

3.1: Microsoft Word Overview and Emerging Features Sections

- 3.1.1: Artificial Intelligence and Microsoft Word
- 3.1.2: Microsoft Word Helpful Tools
- 3.1.3: Mail Merge in Microsoft Word
- 3.1.4: Creating Forms in Microsoft Word
- 3.1.5: Collaborative Editing and Reviewing in Microsoft Word
- 3.1.6: Versions and Version History
- 3.1.7: Word and Excel Real World Applications
- 3.1.8: Microsoft Word Terminology

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SECTION OVERVIEW

3.1: Microsoft Word Overview and Emerging Features Sections



Microsoft Word Overview and Emerging Features

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Topic hierarchy

3.1.1: Artificial Intelligence and Microsoft Word

3.1.2: Microsoft Word Helpful Tools

3.1.3: Mail Merge in Microsoft Word

3.1.4: Creating Forms in Microsoft Word

3.1.5: Collaborative Editing and Reviewing in Microsoft Word

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3.1.8: Microsoft Word Terminology

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3.1.1: Artificial Intelligence and Microsoft Word

This page is a draft and is under active development.

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Introduction: The AI-Enhanced Workplace

The modern workplace is undergoing a significant transformation. Artificial intelligence is no longer a futuristic concept—it's embedded in the software tools you likely use every day. From drafting emails to analyzing spreadsheets, AI assistants are becoming as common as spell-checkers once were.

Understanding how to work effectively with AI tools is quickly becoming an essential workplace skill, much like proficiency in Microsoft Office has become a baseline requirement over the past few decades. Whether you're pursuing a career in marketing, finance, healthcare, or any other field, you'll likely encounter AI-enhanced tools that can amplify your productivity and capabilities.

This section introduces you to the AI tools currently reshaping how business professionals work with familiar applications, such as Word and Excel. It explains the new skills you'll need to thrive in this AI-augmented environment.

Popular AI Tools in the Business Environment

Today's business professionals have access to a growing ecosystem of AI tools, each designed to enhance different aspects of work. Let's explore the major categories you're most likely to encounter.

Microsoft Copilot represents Microsoft's integration of AI across its entire suite of business applications. Available in Word, Excel, PowerPoint, Outlook, and Teams, Copilot acts as an intelligent assistant that understands natural language commands. For example, you might ask Copilot to "summarize this 20-page report" or "create a chart showing quarterly sales trends." The system interprets your request and performs the task, often in seconds.

Google Workspace AI (formerly known as Duet AI, now integrated as Gemini) offers similar functionality to users of Google Docs, Sheets, Gmail, and other Google applications. If your organization uses Google's ecosystem, you'll interact with AI features that can draft emails, analyze data, and generate content directly within these familiar applications.

ChatGPT and Claude are standalone AI assistants that have gained widespread adoption in the workplace. Unlike Copilot or Google's integrated tools, these are separate applications or websites that professionals use for tasks like brainstorming, drafting content, solving problems, or learning new concepts. Many workers keep these tools open in a browser tab alongside their other applications, consulting them throughout the day for various tasks.

Specialized AI tools are designed to address specific business needs. Grammarly utilizes AI to enhance writing quality beyond basic spell-checking, providing tone suggestions and clarity improvements. Notion AI enhances knowledge management and note-taking. Jasper and Copy.ai focus on marketing content creation. As you enter the workforce, you'll discover that different industries and companies have adopted various combinations of these tools based on their specific needs.

AI in Microsoft Word

Microsoft Word with Copilot transforms the traditional word processing experience into an interactive collaboration between you and an AI assistant. Understanding these capabilities will help you work more efficiently with documents in professional settings.

Drafting and editing assistance is perhaps the most immediately useful feature. Instead of staring at a blank page, you can provide Copilot with a basic prompt, such as "Draft a professional email requesting a meeting with a client to discuss project delays." The AI generates a complete draft that you can then refine and personalize. This doesn't mean the AI writes for you—instead, it provides a strong starting point that you shape into the final product.

Copilot can also assist you in editing existing content. You might highlight a paragraph and ask it to "make this more concise" or "adjust the tone to be more formal." The AI understands context and can rewrite sections while maintaining your document's

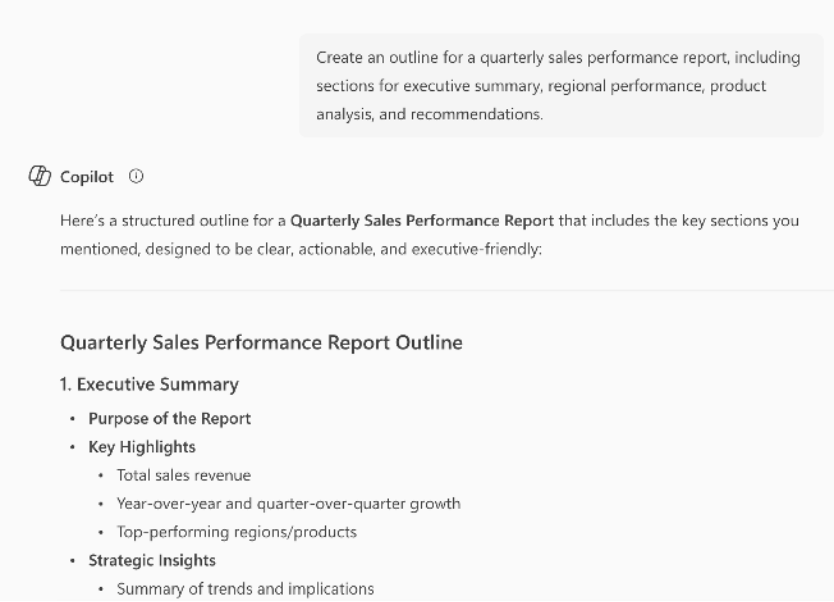
overall flow and purpose.

Document formatting and summarization features save a considerable amount of time. Copilot can automatically format lengthy documents with appropriate headings, create tables of contents, or adjust styling to match corporate templates. When you need to digest information quickly, you can ask Copilot to summarize lengthy documents, extracting key points and action items.

Real-world example: Creating a business report. Imagine you're an intern tasked with creating a quarterly performance report. You have data from various sources, meeting notes, and previous report templates. Here's how AI might assist:

1. You start by asking Copilot to "Create an outline for a quarterly sales performance report including sections for executive summary, regional performance, product analysis, and recommendations."
2. Copilot generates a structured outline. You then paste your raw data and notes into different sections.
3. For each section, you might ask Copilot to "draft a summary of this data, highlighting the most significant trends." The AI analyzes your numbers and writes initial descriptions.
4. You review what the AI wrote, verify the accuracy against your source data, adjust the interpretation where needed, and add your own insights and observations.
5. Finally, you ask Copilot to ensure consistent formatting throughout and generate an executive summary of the complete report.

Throughout this process, you remain the author and decision-maker. The AI accelerates the mechanical aspects of report creation, allowing you to focus more time on analysis, interpretation, and strategic thinking.



AI in Microsoft Excel

Excel has evolved from a spreadsheet program into an intelligent data analysis platform. AI capabilities in Excel are compelling because they make advanced data analysis accessible to users who may not have extensive technical training in statistics or programming.

Natural language data analysis is transforming how professionals interact with spreadsheets—previously, analyzing data required knowing specific functions and formulas. Now, you can ask questions in plain English. For example, with a sales dataset open, you might type "What were the top 5 selling products last quarter?" or "Show me a breakdown of revenue by region." Copilot interprets these questions, performs the necessary calculations, and presents results—often with visualizations.

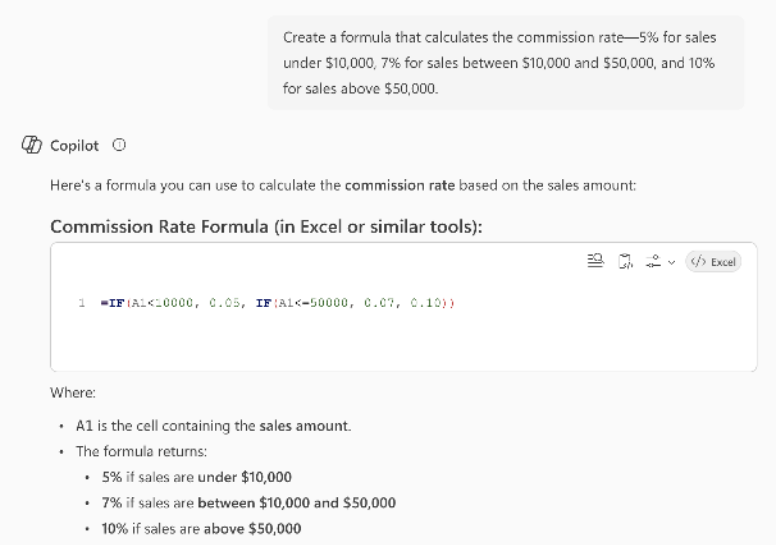
This capability democratizes data analysis. You no longer need to memorize dozens of Excel functions to extract insights from your data. Instead, you can focus on asking the right questions and interpreting the answers.

Automated formula generation addresses one of Excel's steepest learning curves. Complex formulas, particularly those using functions like VLOOKUP, INDEX-MATCH, or nested IF statements, can be intimidating. With AI assistance, you can describe

what you want to calculate in everyday language: "Create a formula that calculates the commission rate—5% for sales under $10,000, 7% for sales between $10,000 and $50,000, and 10% for sales above $50,000."

Copilot generates the appropriate formula, often explaining how it works. This serves a dual purpose: you get immediate results, and over time, you learn more about Excel's capabilities by seeing how the AI solves problems.

When formulas contain errors, AI can help identify and correct them. Instead of searching through documentation or online forums, you can simply describe the error you're encountering, and the AI can identify the issue and suggest corrections.



Real-world example: Financial analysis and forecasting. Consider a scenario where you're working in a company's finance department, analyzing monthly expenses to create a budget forecast.

1. You import six months of expense data into Excel—thousands of rows covering various departments and expense categories.
2. You ask Copilot to "identify the top three expense categories and show month-over-month growth rates." Within seconds, you have a summary table and chart.
3. You notice an unusual spike in marketing expenses. You ask, "Which specific marketing expenses increased most dramatically in April?" The AI breaks down the category and identifies the outliers.
4. For forecasting, you request: "Create a three-month projection for each department's expenses based on current trends, accounting for the 5% budget reduction mandate." Copilot generates formulas using appropriate statistical functions and creates forecast tables.
5. You review the projections, apply your business knowledge (perhaps you are aware of an upcoming project that will impact specific departments), and adjust the AI's baseline forecasts accordingly.

Again, the pattern is clear: AI handles data manipulation and calculation, while you provide business context, verify accuracy, and make informed decisions based on the results.

Essential Skills for the AI-Augmented Workforce

As AI tools become ubiquitous in business environments, a new set of skills is emerging as essential for workplace success. These aren't technical programming skills—they're practical competencies that anyone can develop.

Prompt engineering basics refers to the skill of communicating effectively with AI systems. Unlike traditional software, where you click buttons and select menu options, AI tools respond to written instructions, known as "prompts." The quality of your results depends heavily on how well you craft these prompts.

Effective prompts are typically:

- **Specific**: Instead of "help me with this data," try "calculate the average sales per quarter and identify any quarters that were more than 20% below the overall average."

- **Contextual**: Provide relevant background. "I'm drafting a formal proposal for a client in the healthcare industry" yields better results than simply "write a proposal."
- **Iterative**: Start with a basic prompt, review the results, then refine. "Make this more concise" or "add more specific examples" helps you shape the output.

As you practice, you'll develop an intuition for how to phrase requests to get optimal results. This skill—knowing how to "talk to" AI systems effectively—is becoming as valuable as learning how to use advanced software features.

Critical evaluation of AI outputs is perhaps the most crucial skill in the era of AI. AI systems are powerful but not infallible. They can generate plausible-sounding content that contains errors, biases, or hallucinations (completely fabricated information presented confidently as fact).

You must always:

- Verify facts and figures against reliable sources
- Check that AI-generated formulas actually perform the calculations you intended
- Ensure that AI-written content aligns with your organization's voice and values
- Review for potential biases in AI-generated analysis or recommendations

Think of AI as a competent intern: useful and productive, but requiring supervision and verification. You remain responsible for the final product, regardless of how much AI assistance you used in creating it.

Understanding when to use (and not use) AI tools demonstrates professional maturity. AI excels at specific tasks while being inappropriate for others.

Good uses of AI include:

- Generating first drafts and outlines
- Summarizing lengthy documents
- Performing routine data analysis
- Formatting and organizing information
- Brainstorming ideas and alternatives

Poor uses of AI include:

- Making sensitive decisions without human judgment (hiring, firing, medical decisions)
- Handling confidential or proprietary information (depending on your organization's policies)
- Creating content where authenticity and personal voice are crucial
- Situations requiring current, real-time information (unless the AI has internet access)
- Complex strategic decisions requiring deep industry expertise

Part of becoming AI-literate is developing judgment about which tools to use for which tasks, and when human intelligence remains irreplaceable.

Ethical considerations and data privacy must not be overlooked. When you input information into AI tools, consider where that data will be stored and how it may be used. Many AI systems utilize interactions to train and improve their models, meaning that your company's sensitive information could potentially become part of the AI's knowledge base.

Before using AI tools with work-related information, always:

- Understand your organization's AI usage policies
- Never input confidential client information, trade secrets, or personal data into public AI tools
- Be aware of whether your company uses enterprise versions of AI tools with stronger privacy protections
- Consider the ethical implications of AI-generated content, particularly regarding transparency and authenticity

Additionally, remain aware that AI systems can perpetuate biases present in their training data. An AI might generate job descriptions that inadvertently discourage specific demographics from applying, or produce analysis that reflects historical inequities. Your role includes catching and correcting these issues.

Conclusion: Building AI Literacy

As this section has demonstrated, AI tools are not replacing human workers—they're changing what it means to be an effective professional. The most successful workers in the years to come will be those who can seamlessly integrate human judgment, creativity, and expertise with AI's computational power and efficiency.

AI as a collaborative tool, not a replacement. It's essential to maintain a balanced perspective on what AI can and cannot do. These tools handle routine tasks, process large amounts of information quickly, and provide starting points for creative work. However, they lack proper understanding, contextual awareness, and the ability to make nuanced judgments that consider organizational culture, relationship dynamics, and strategic implications.

Your value as a professional lies not in performing tasks that AI can automate, but in providing the human elements: strategic thinking, emotional intelligence, ethical reasoning, relationship building, and contextual decision-making. AI amplifies these human capabilities rather than replacing them.

The importance of continuous learning. AI technology is evolving rapidly. The tools available today will be more capable next year, and entirely new categories of AI assistance will likely emerge throughout your career. Developing a mindset of continuous learning is essential.

This means:

- Staying curious about new AI capabilities as they're released
- Experimenting with AI tools in low-stakes situations to build familiarity
- Learning from colleagues who use AI effectively
- Reading about AI trends and best practices in your industry
- Remaining open to changing your workflows as better tools become available

Next steps for developing AI competency. You don't need to become an AI expert overnight. Start small and build your skills progressively:

1. **Experiment regularly**: Use AI tools for small tasks—summarizing articles you need to read, drafting routine emails, or analyzing simple datasets. Regular practice builds intuition.
2. **Compare and learn**: When you use AI to generate content or analysis, compare it to what you would have created manually. This helps you understand the tool's strengths and limitations.
3. **Seek feedback**: Ask supervisors or mentors to review work you've created with AI assistance. Learn what meets professional standards and what needs improvement.
4. **Stay informed**: Follow reputable sources covering AI in business. Understanding where the technology is heading helps you prepare for future developments.
5. **Share knowledge**: As you discover effective techniques, share them with classmates or colleagues. Teaching others reinforces your own learning and contributes to a more AI-literate professional community.

The integration of AI into business tools represents one of the most significant transformations in the workplace in decades. By developing AI literacy now, while you're still in school, you'll enter the workforce with a competitive advantage and the adaptability needed to thrive in an increasingly AI-augmented professional environment.

Remember: the goal isn't to let AI do your work for you. The goal is to leverage AI, allowing you to focus on higher-level thinking, creativity, and the distinctly human contributions that create real value in any organization.

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3.1.2: Microsoft Word Helpful Tools

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Focus Mode

Improve Your Focus



"Focus mode will hide the taskbar and the ribbon at the top of your document, leaving just the Word Document itself showing. Focus mode was built with the intention of removing any distractions from the document so that you can focus on writing and creating in Word. Turning on Focus mode can be a great way to encourage yourself to stay focused, with no visible distractions the idea is that you will be left with nothing but typing, collaborating and creativity to produce onto the page. If you are trying to focus, it's also a good idea to close down your internet browser, remove any other open tabs, pages or windows on your computer and get yourself into the zone. Sometimes even some background music or white-noise can help you to stay on track."

Immersive Reader

Your Guide to Immersive Reader



Learn how Immersive Reader can help increase reading speed and comprehension for all ages and abilities.

Inserting Equations

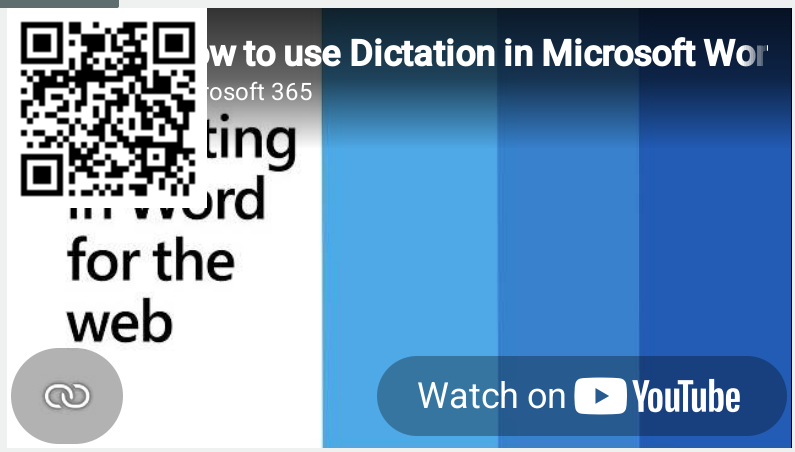
How to Insert an Equation in Microsoft Word



Master the process of inserting equations in Microsoft Word to enhance your academic or scientific documents. This tutorial explains how to use the built-in equation editor to create complex mathematical expressions easily. Ideal for students, educators, and professionals in technical fields, inserting equations helps clearly communicate numerical concepts and relationships. Learn to access the equation tool, utilize templates, and manually enter formulas for precise mathematical documentation.

Dictation

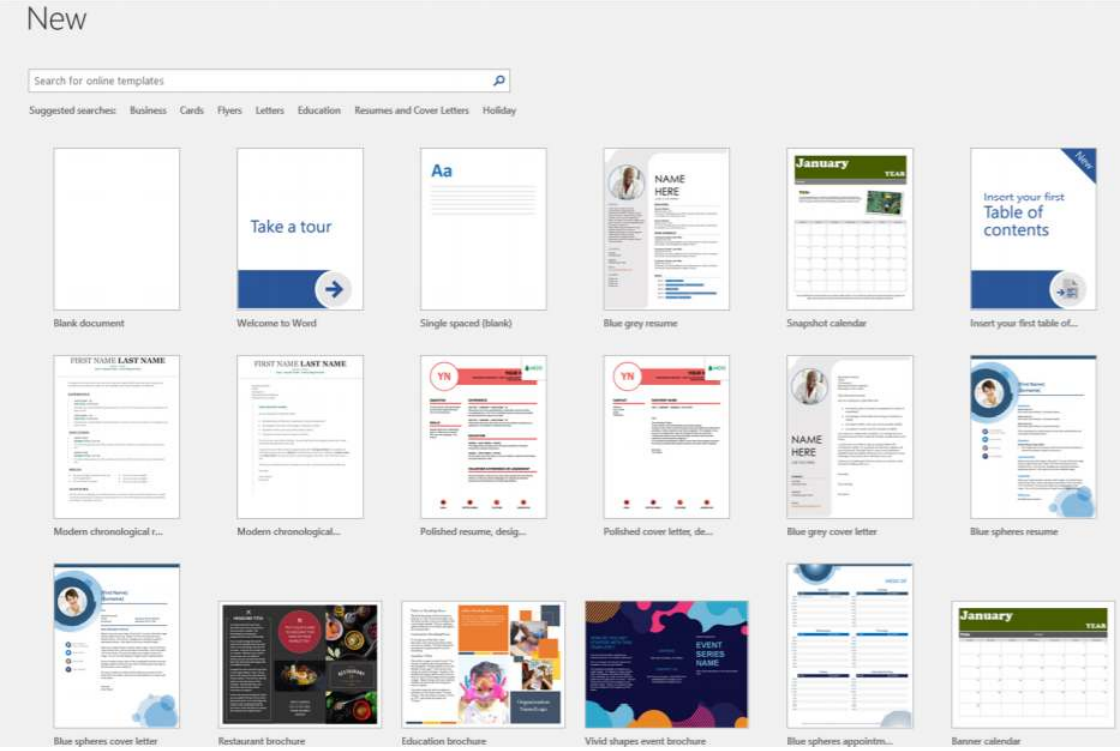
Dictating in Word for the Web



Dictation is a fast and easy way to convert speech to text on Microsoft Word. It's a quick and easy way to get your thoughts out, create drafts or outlines, and capture notes. In this step-by-step tutorial, you'll learn how to use Dictation in Word. All you need is a microphone and a reliable internet connection.

Using a Template

While many users prefer to begin their work with a blank web page, word has many templates or preformatted documents that make it easy to create a Résumé or a Flyer. To create a template, click on the File tab of the Ribbon, and then “New”.



Word will then showcase all the available templates. Users may also search online for templates in different styles or formats. There are so many templates available, the most important aspect for the user is to find one that meets their needs.

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- **10.6: Using a Document Template** by Nick Heisserer is licensed CC BY 4.0.

3.1.3: Mail Merge in Microsoft Word

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Learning Objectives

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

- Understand the purpose and function of mail merge
- Set up a main document for mail merge
- Set up a source document for mail merge
- Complete a mail merge

As companies grow, they may need to scale up their production methods. This can be a complicated process. An increase in size usually means an increase in revenue, but this comes at the cost of an increase in units produced or services rendered. As a result, companies need to find ways to make their everyday business process more efficient and automated.

One form of automation is the streamlining of communication with customers. With an increase in volume, the sales team needs to handle hundreds or thousands of clients every day. This can be made easier through the use of form letters, which are a kind of template for communication. In form letters, the content of the letter is the same for all recipients, but certain information may be personalized or customized. The mail merge tool in Word is one way to create these autogenerated letters. Although there are third-party companies that offer these large mailing type services, the mail merge features in Word are free and simple to learn.

What Is Mail Merge?

Many businesses stay in touch with their clients and customers using some form of communication. Some of these communications may be printed ads; some may be email newsletters. These communications are sometimes personalized with the name of the recipient. How do businesses automate this personalized process? One way to do this is by using mail merge. Mail merge is a tool in Word that lets the user write a form letter or advertisement, while leaving some areas of the document blank. These blanks are fields that can be programmed to contain personalized information: the recipient's given name, phone number, address, or any other type of customized field.

The mail merge tool makes sending letters or emails to hundreds or thousands of people relatively easy. The process typically begins with the composition of the communication that you want to send to the recipients; this is referred to as the main document. The main document will have blank spaces, or fields, where personalized information will go. Then, you need to create your source document, a separate document that has all the required information that will go into the blank customizable fields, such as postal addresses or email addresses. The source document can be a document that already exists, such as a list in Microsoft Excel or Access (we will talk about these programs later in the text). Or, you can create a new list of names and addresses. A business may already have this document in Excel or Access, as some businesses keep a running contact list. Finally, information in the source document and the information in the main document are combined to create the merged document. This merged document will show the personalized customer information in the designated blank fields on the main document, then multiply this form by the number of recipients. For example, if the form letter is one page and you have fifty clients, Word will create a merged document of fifty letters that can be printed.

Let's walk through an example of how to use the mail merge tool to send out a set of personalized letters to customers. You will learn how to build a main document, your source document, insert merged fields, and merge to finalize your letter.

The Main Document

The first step of the mail merge is to compose your main document. The main document could be an existing document, a template (.dotx) document, or a brand-new document. In this example, let's use a business letter template as the main document. You can type it up yourself based on the example in Figure 5.19, or use the text provided in the downloadable Mail Merge document. This

letter will be sent to WorldCorp customers, informing them of the upcoming holiday hours for the warehouses so that they can plan for delayed shipments.

Figure 5.19 shows a form letter to inform the customers of the holiday closures. The template used is called Business Letter (simple design) to create the letter. We also added a simple WorldCorp logo at the top of the letter. We have highlighted in green where we want the mail merge tool to create the personalized fields. These are not the actual fields, yet; this highlighting is simply to help us mark those locations for when we do add them. In this letter, we will insert the customer's address and the greeting line with their name. You can certainly use more fields than these. But for this example, keep it simple so you can learn the process.

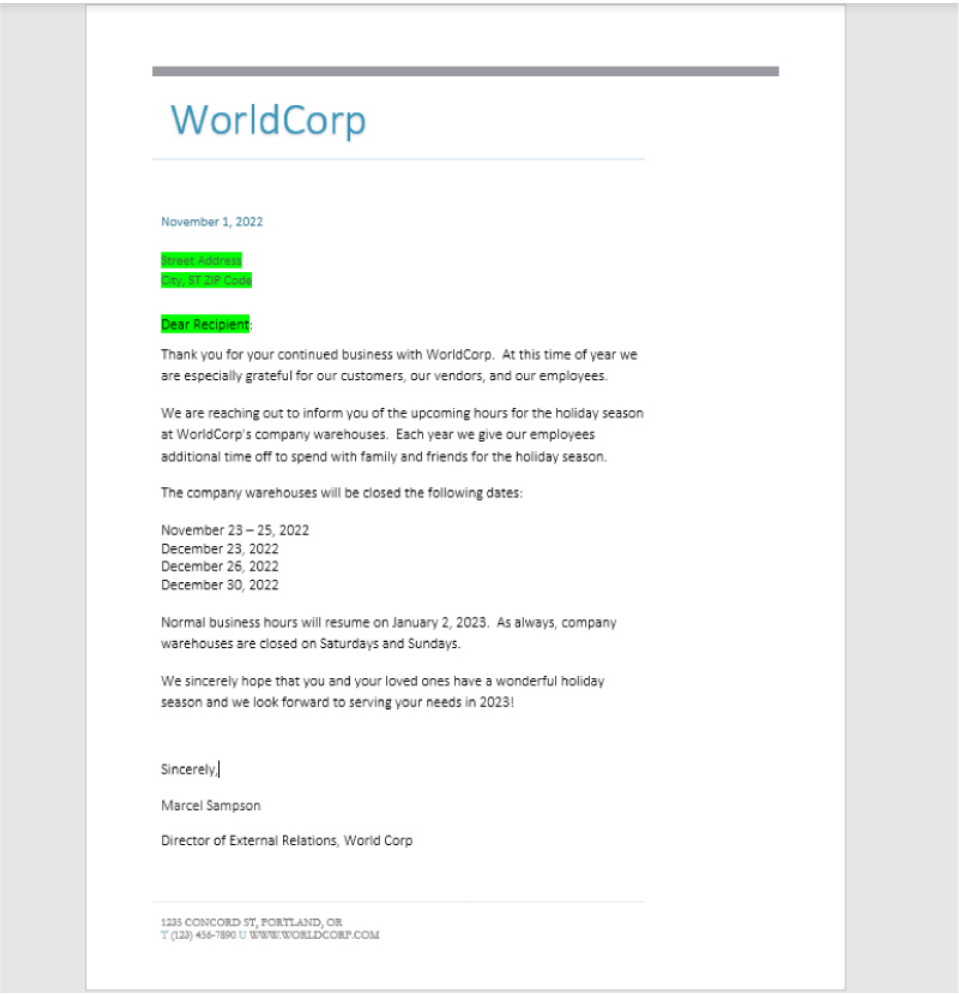


Figure 5.19: Templates can be used to create the main document for mail merge. (Used with permission from Microsoft)

The Source Document

The source document needs to be a listing created in Excel or Access. But this walk-through will build a new list rather than using an existing list. You will build the new list with just a few customers so you can see how mail merge works. But remember, mail merge can be used with many customers and is virtually limitless. The capacity of the mail merge is limited by the capacity of your computer.

The source document is built with the intended recipients. To begin, go to the Mailings tab, Select Recipients, and choose Type a New List from the menu (Figure 5.20).

Mac Tip

Under the Mailings tab, click on Select Recipients, and choose Create a New List.

Notice there are two other choices: Use an Existing List and Choose from Outlook Contacts. When you have finished entering in the information for the customers, click OK.

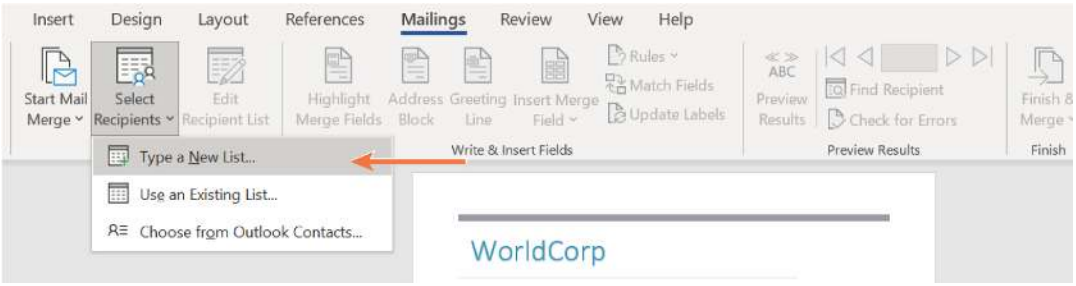


Figure 5.20: Although you can create a new recipient list, if you have a long list, it is better to work from an existing file. (Used with permission from Microsoft)

When you choose to create a new list, a dialog box will open so that you can build your list of recipients. Here, you type in the relevant information for the mail merge, as shown in Figure 5.21. By choosing Customize Columns at the bottom of the dialog box, you can add or remove the fields that you are not using. Make sure you add all the information you think you will need for your custom fields. When you do the final mail merge, you will only be able to choose from the defined information you provided in the source document. For this example, we need the customer name and address.

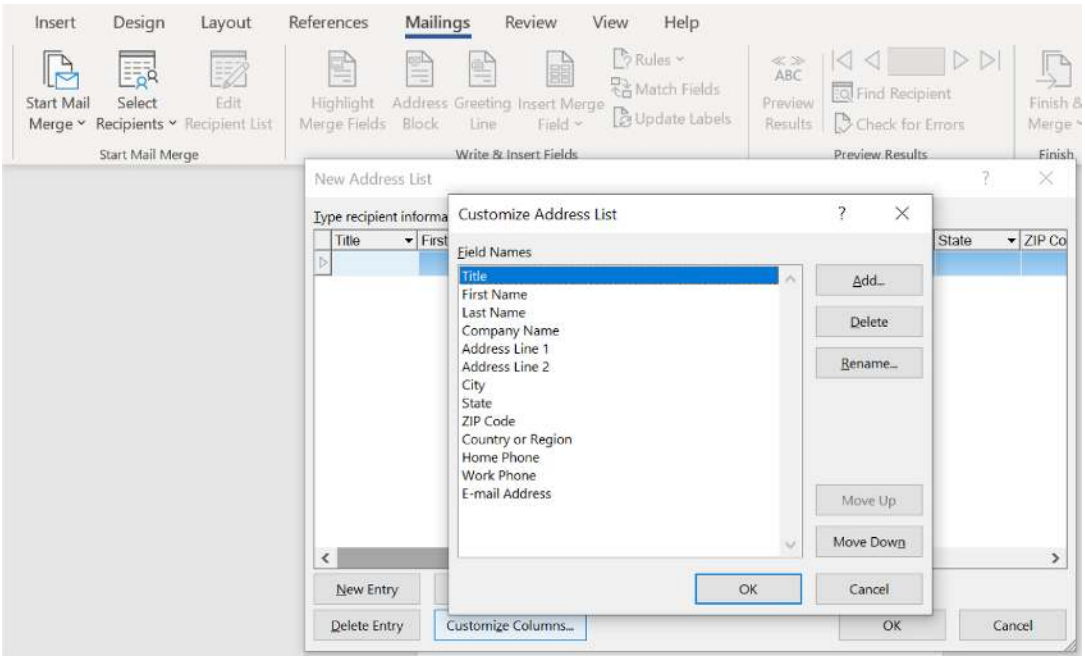


Figure 5.21: You can customize the fields used in the list. (Used with permission from Microsoft)

When you finish selecting the fields needed for the mail merge, you will be prompted to save the list as a new file for use as the source document in the mail merge (see Figure 5.22). The default location for the file is in a folder called “My Data Sources” (Figure 5.23). You might consider a descriptive name to tell you that this file contains data used in a mail merge.

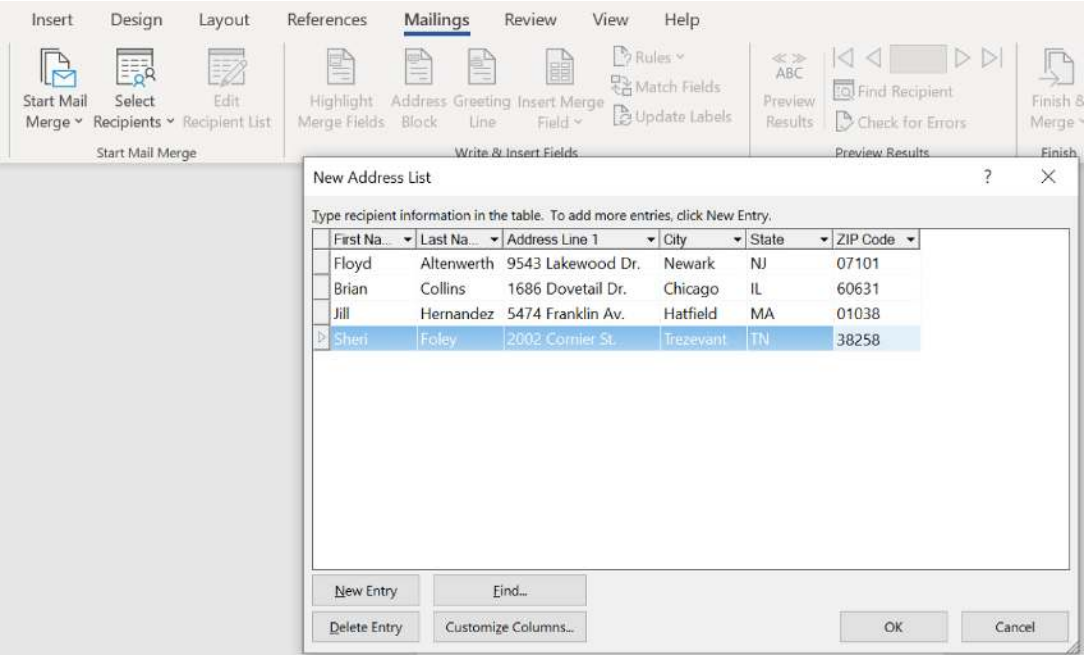


Figure 5.22: When you finish entering the information, click OK to save the file. (Used with permission from Microsoft)

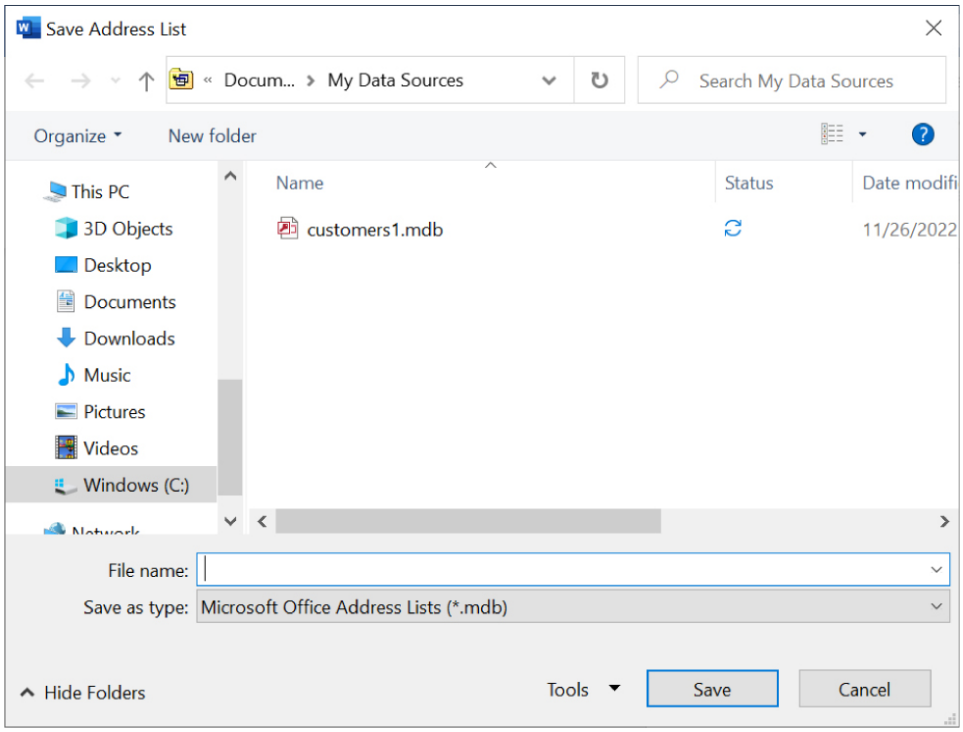


Figure 5.23: The list will be saved as a file with a special extension so that Word knows the list is the source document for mail merge. (Used with permission from Microsoft)

Merge Fields

Now that you have created the main document, and created and saved the source document, you now need to insert the merge fields into the main document. First, insert the blank fields on the letter so that Word can automatically fill them with personalized information: First name, Last name, Address, City, State, and Zip. In Figure 5.24, you can see the icons in the Write & Insert Fields command group on the Mailings tab. These give us some common merge fields: Address Block, Greeting Line, and Insert Merge Field. For this example, use Insert Merge Field. When you select the option, you will notice that the fields available in the drop-down list are the fields from your source document. Therefore, make sure the fields in your document are descriptive and as

separated as you would like them to be, for example, if you are sending a mailing out to voters, consider whether you should include all the members of the household in one mailer, or if you should address them separately (in which case, you should list each of their names individually).

To insert the field, put your cursor where you want the field inserted into the letter. For our example, we want “Address_Line_1” to replace our highlighted green street address placeholder (see Figure 5.25). Simply click on the field from the list and it will be inserted at the cursor location. Repeat this process for the other fields. Notice the fields are denoted by “« »”. This notation tells Word to get the relevant information from the source document to put into that line in the document.

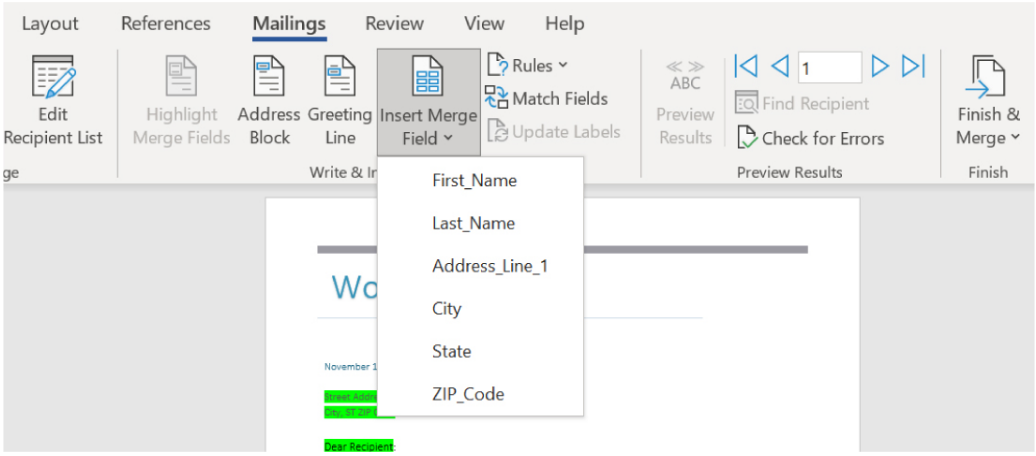


Figure 5.24: The fields in your source document are in the Insert Merge Field drop-down menu. (Used with permission from Microsoft)

November 1, 2022

«Address_Line_1»
«City», «State» «ZIP_Code»

Dear «First_Name» «Last_Name»:

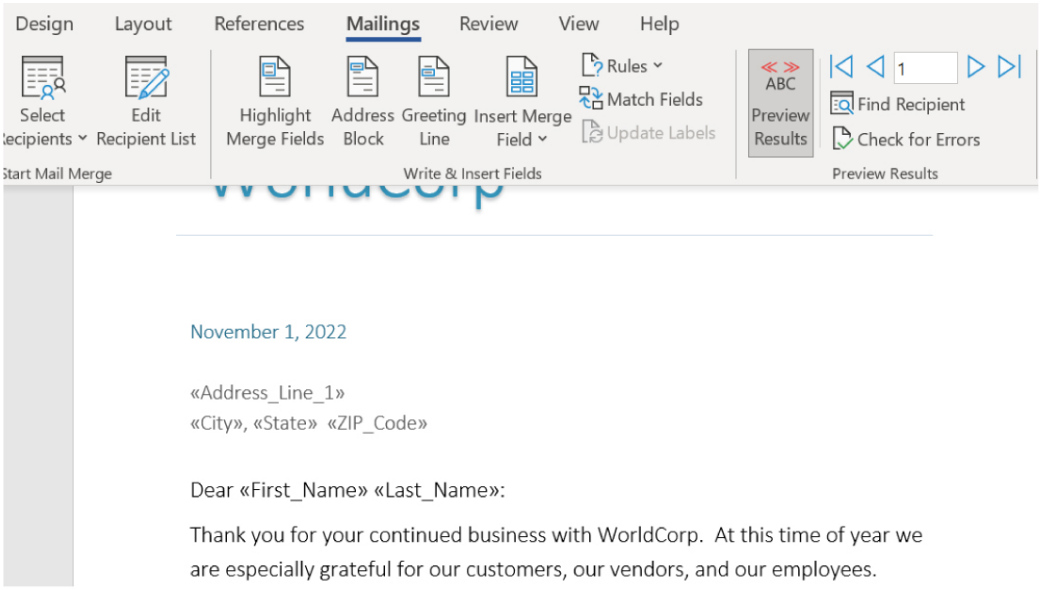
Thank you for your continued business with WorldCorp. At this time of year we are especially grateful for our customers, our vendors, and our employees.

We are reaching out to inform you of the upcoming hours for the holiday season at WorldCorp’s company warehouses. Each year we give our employees additional time off to spend with family and friends for the holiday season.

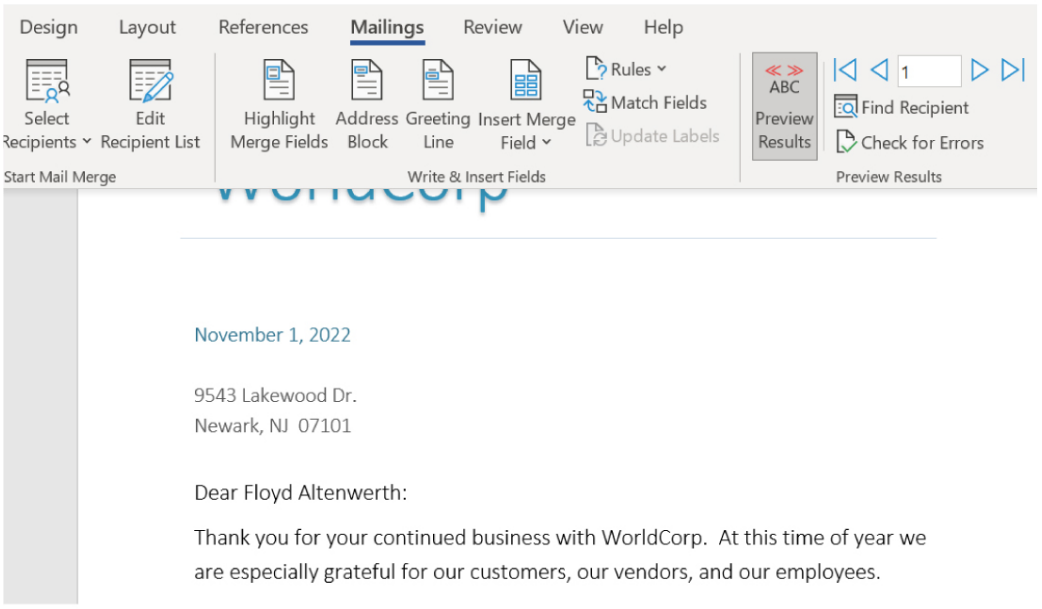
The company warehouses will be closed the following dates:

Figure 5.25: Be sure to remove the green highlighting in the document as we just used this to show where we wanted to insert the merge fields. (Used with permission from Microsoft)

Now that we have our source document with all of the customer information saved, and we have inserted the custom fields into the main document, we can complete the mail merge process. First, you should always preview the document to make sure it looks as it is supposed to. Go to the Mailings tab and select Preview Results, as shown in Figure 5.26a. This allows you to see all of the letters with the actual, personalized information in place, as in Figure 5.26b. All the merge fields you designated in the main document will be substituted by the actual information. You can use the left and right arrows at the top-right area of the ribbon to toggle between recipients.



(a)



(b)

Figure 5.26: (a) Before you complete the merge, preview the results so that everything looks as it should. (b) Notice the fields have been replaced with the first name in our recipient list. (Used with permission from Microsoft)

If everything looks okay, then you can complete the mail merge. Go to the last icon on the Mailings tab, Finish & Merge. The drop-down menu gives you options to edit, print, or send emails with the merged documents. In this case, we are going to mail the letters to the customers, so we will choose Print documents from the list. If there were any issues when you previewed the letters, you could select Edit Individual Documents to make the necessary changes. When you choose to print, you are given the option to select which ones you want to print. We will choose “All” for our example. The Print dialog box will open with the default printer displayed. You can choose to send the letters directly to the printer now by selecting OK, or you can choose to print the file to a .pdf file so that it will be saved. This .pdf file will have four pages, one for each of the four recipients in the source document list.

What you have just walked through is a mail merge from scratch. There is also a “Step-by-Step Mail Merge Wizard” that guides you through the same steps. You can use mail merge for a wide variety of applications, such as creating name tags for an event;

making labels for mailing packages/letters; creating envelopes, business cards, or postcards; or sending emails to a large group. Even though the tool is called mail merge, its capabilities go beyond simply creating a mailing.

Link to Learning

Visit Microsoft's detailed support page on doing a mail merge to learn more.

Further support can be found on Red Tail Technology's sample mail merge templates page, which has some examples of downloadable form letters.

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3.1.4: Creating Forms in Microsoft Word

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Learning Objectives

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

- Understand the Developer tab and its usage
- Use the tools in the Controls command group
- Create a fillable form in Microsoft Word

This section reviews how to build a fillable form in Word. Fillable forms can be very useful in businesses. These forms can be emailed to recipients as attachments and the recipients can fill in required information into the form quite easily. The fillable form creates fields that can be filled in by typing directly into the Word document. You can also insert checkbox fields, drop-down menus, and long text fields into the form. Fillable forms have many applications in business, such as gathering information on new hires that you might later want to put into a database, or obtaining company information from vendors for billing purposes. The primary purpose of the fillable form is to facilitate electronic completion while keeping the integrity and formatting of the document. Individuals can only input information into the fields you have identified. The rest of the document is locked from editing or deleting.

Figure 5.28 shows a simple example of how a fillable form can be a useful tool. If you wanted to gather information on a new vendor, for example, you could create a simple document, email it to the vendor, and have the vendor send the completed document back to us. However, as Figure 5.27 shows, if you just create the form as a typical, printable Word document, it is difficult for the vendor to input their information. They would need to edit the form itself in order to fill it out, which is not ideal. With a fillable form, the vendor simply inserts their information into the provided fields and the rest of the document is protected from editing. The fillable form can also be enhanced with decorative features, such as the company logo.

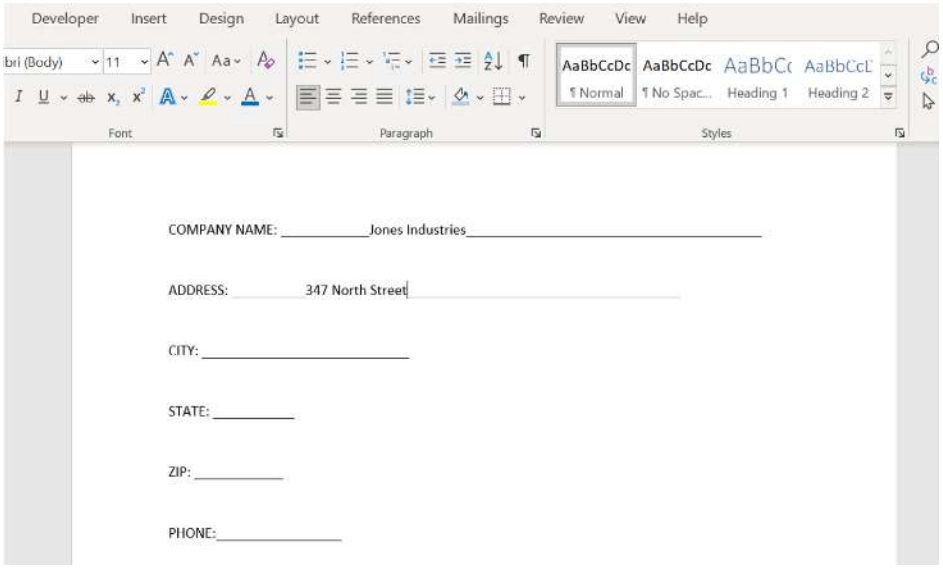


Figure 5.27: As information is entered into the form, the underline is replaced with the text. (Used with permission from Microsoft)

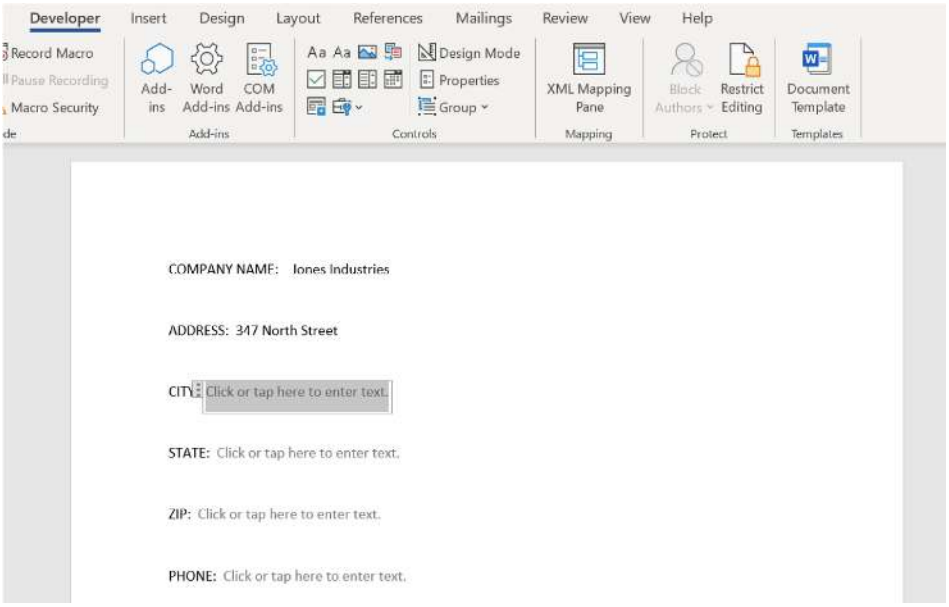


Figure 5.28: A fillable form gives a more professional appearance and can be customized with the company logo or letterhead. (Used with permission from Microsoft)

Developer Tab

To create surveys in Word, you need to enable the Developer tab. This is typically not one of the default tabs in Word, so you need to manually add it. Go to the Options command on the File tab, then on the Customize Ribbon tab, then enable the Developer tab.

Mac Tip

To add the Developer toolbar on a Mac, you will need to go to Word, then select Preferences, then go to Ribbon & Toolbar. In the Search box, type "Developer." Select the Developer tab from Suggestions. In the dialog box under the ribbon header, select the box that says Show Developer Tab.

The Developer tab serves several purposes, as Figure 5.29 shows. In addition to containing the tools needed to design fillable forms, it also contains the tools to create computer programs (macros) in Word, to protect and restrict access to your document, and other advanced tasks.

The majority of the features on the Developer tab are for more advanced uses of Word and are outside the scope of this text. This section focuses on the Controls and Protect command groups, which contain the tools we need to create and secure our fillable form.

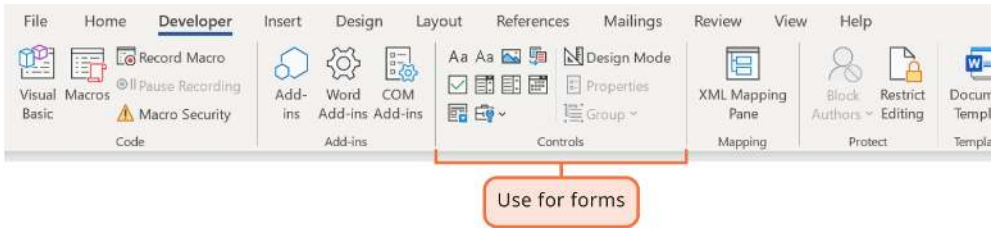


Figure 5.29: Making a form in Word uses these control commands. (Used with permission from Microsoft)

Controls Command Group

The Controls command group includes several different icons to represent the fields you can use in your form. Figure 5.30 identifies the icons you will be using to create the form. The remaining icons in the command group are used for building sophisticated templates in Word. The controls we are using in this example are called content control fields. These fields give people a space to type in, add a date or image, or choose their response from a list. In other words, they are interactive fields that

can be specially programmed to receive input from recipients. The content control fields create a user interface that seeks input from the respondent.

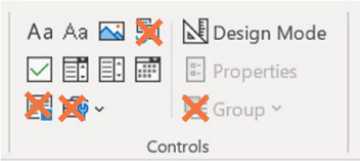


Figure 5.30: The controls you see with the "X" are not used when creating fillable forms. (Used with permission from Microsoft)

The top-level commands are for inserting text or images into your form. The inputted answer will use either rich text or plain text. Rich text allows the user to use bold, italic, and underlined font, different font types, and so forth, whereas plain text does not allow these types of font formatting. This distinction is important if you plan to print the form and want the text to appear with specific formatting. In general, the plain text response will suffice, as most respondents will not need to add formatting to their answers. The Insert Picture command (the landscape icon) is for letting the respondent add an image to their answer; this command may be used to ask the user to upload their profile picture, for instance.

The middle-level commands are for asking multiple-choice-type questions and for setting the date. The first (leftmost) in this row is the checkbox. This handy option reduces the amount of information that needs to be typed into the form. For example, the form could have a list of all departments at the company, and the respondent could simply check the box of the department that they work in, rather than type in the response manually. You could also have multiple-select questions that ask the survey taker to "check all boxes that apply."

The combo box and the drop-down list also ask the respondent to select from a set of preset choices. The main difference between the two is that the combo box lets the individual type a message after their selected answer, whereas the drop-down list forces them to choose between the options. The last (rightmost) command is the Date Picker, which allows the individual to select a date when they are completing the form. The respondent can choose any date with the Date Picker, such as their birthday or their date of hire.

The Design Mode tool is used to customize the prompts that appear as the survey taker fills out the form. You can use this to customize the prompt to the respondent; this can be more helpful to the survey taker than the generic default text (e.g., "Click or tap to enter text").

The last item you may use in the command group is the Properties tool. This tool allows you to modify the lists associated with the combo box and the drop-down list. It becomes active once you have added a combo box or drop-down list to your form.

Creating a Form

Before adding the fields, you should first develop the plan of the form. One way to do this is to type out the information or questions that you will ask into a blank document. Creating the form using a table is one option for presenting a professional appearance; this format helps keep everything organized and neatly aligned. The table should have two columns, and as many rows as you will have questions. Using only two columns allows you to put the questions in one column and the answer fields in the other. The column on the left will have your questions, and the column on the right will have the fields for the respondent's answers. You should change the table borders (in Table Properties) so that they are transparent, making it so that the respondent cannot see them. This way, the questions and answers remain aligned, but they will not appear to be in a table format to those viewing the form. Alternatively, you could choose to not use a table to create your form. In this case, the questions and answer fields would need to each be manually aligned.

For this example, let's use a table to create a fillable form. In your role at WorldCorp, you have been asked to collect information from all department office managers regarding their need for preprinted company office supplies. Your department (marketing) is responsible for all office supplies that include the WorldCorp logo. A large order is placed each quarter for items such as letterhead paper, envelopes, notepads and pens with the logo, and business cards. To help facilitate the process, your supervisor has asked you to create a fillable form that can be emailed to each department's office manager to gather information on items that will need to be ordered.

Creating Questions and Control Fields

To begin, start with a blank document and insert a two-column table. Type all your questions in the left column: information on the department, whether they need items ordered, and the quantity and type of items are needed. Figure 5.31 shows how the information will be gathered from the various departments. Because this is just the draft form, we have noted in parentheses the type of control that will be used for that question. You can go back and remove that information after you have inserted the fields. Notice that the table lines are still visible in this initial draft version. To remove the lines from the table, use the Borders tool in the Paragraph command group on the Home tab.

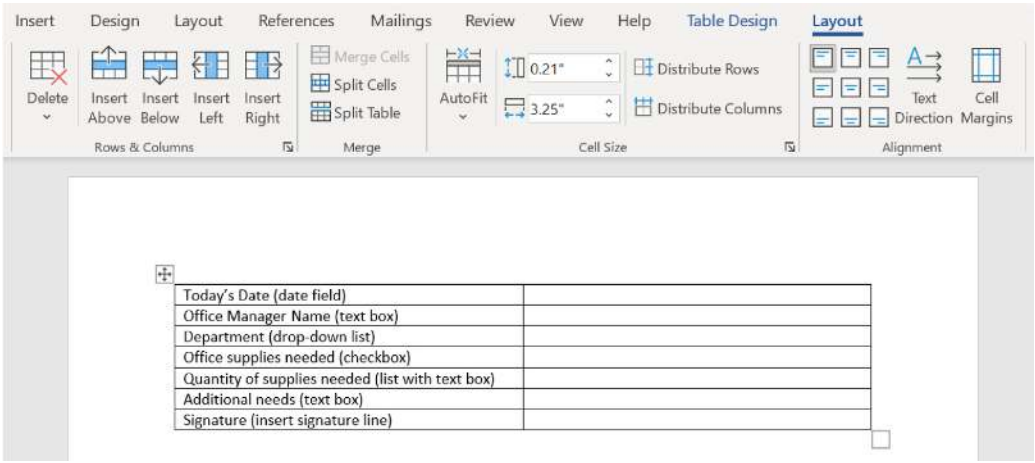


Figure 5.31: Your form should have a tidy and professional appearance. This could mean removing the lines around the table and inserting the company logo. (Used with permission from Microsoft)

Then, insert the control fields—where the respondent will put their answers—in the right column. First, insert the Date Picker control field, as Figure 5.32 shows. Notice the text says, "Click or tap to enter a date." This is not very descriptive. You can change this in Design Mode to be more descriptive. Design Mode lets you change the preset instruction text. To turn on Design Mode, simply click it in the Controls command group. You are now able to change the default text to be more specific such as "Enter Today's Date" (Figure 5.33).

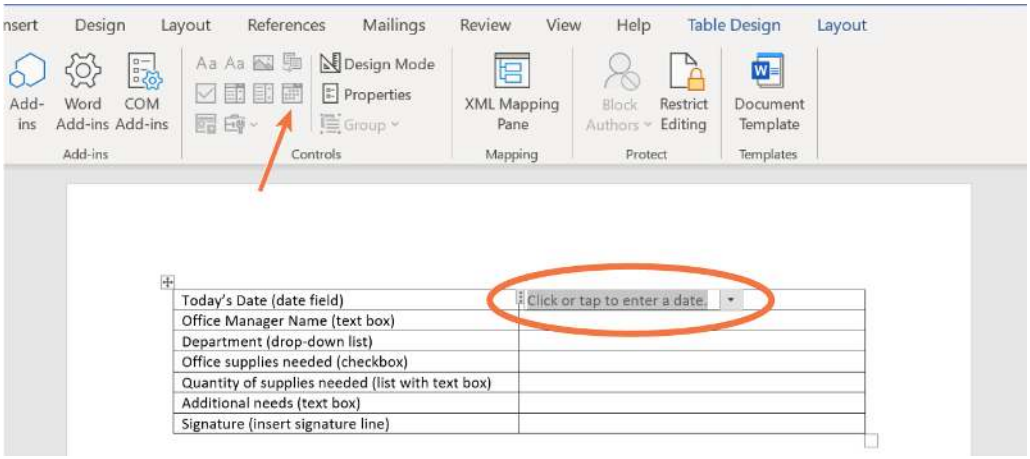


Figure 5.32: The default text inserted with the control fields is not very descriptive, so you may want to replace it with your own, more detailed text. (Used with permission from Microsoft)

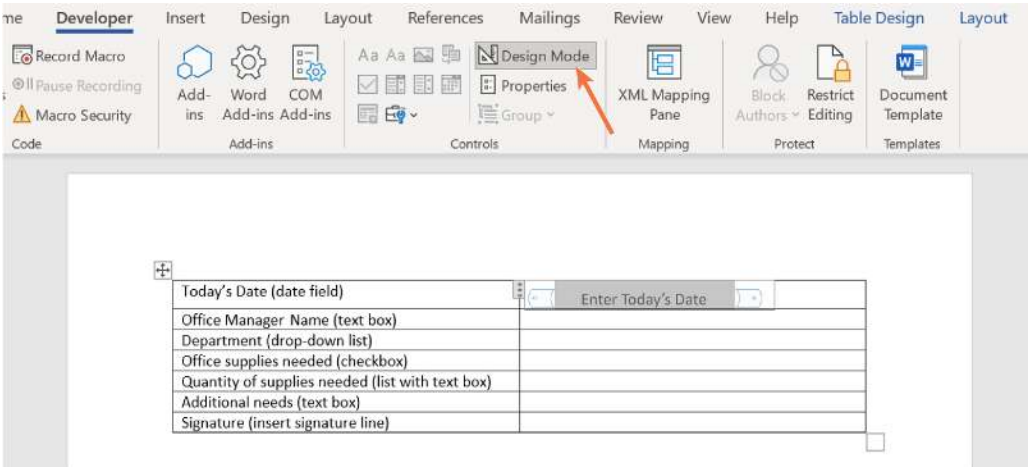


Figure 5.33: Your custom text should be descriptive enough so that the user knows exactly what they need to put in the field. (Used with permission from Microsoft)

Continue with the remaining questions and enter the field and specific prompter text for each question. Figure 5.34 shows how the form should look at this point. Now, go back to each question and examine the properties to determine if changes need to be made. Notice that a bulleted list and the insert signature tool were used in the right column. (You learned these skills in the Creating and Working in Documents and Document Preparation chapters.) Note that the notes in parentheses were also removed.

Today's Date	Enter Today's Date
Office Manager Name	Enter First and Last Name
Department	Choose Your Department
Office supplies needed	☐
Quantity of supplies needed	• Letter head Enter qty needed • Envelopes Enter qty needed • Notepads Enter qty needed • Pens Enter qty needed • Business Cards Enter employee name for cards
Additional needs	Any additional items needed from Marketing ?
Signature	X _____

Figure 5.34: Changes to the line spacing in the table now make the form more visually appealing. (Used with permission from Microsoft)

Now that you have the form constructed and the control fields inserted, you can customize each control field if necessary. To do that, you need to select the control field, and then choose the Properties command. A dialog box will appear for that control, as shown in Figure 5.35 for the first field, "Today's Date." Here, you can change the format of the date to be entered. There are only a few options for the text boxes. You can change the font and the fill color. You can also choose to have the control locked so that it cannot be deleted. For this example, use the default settings.

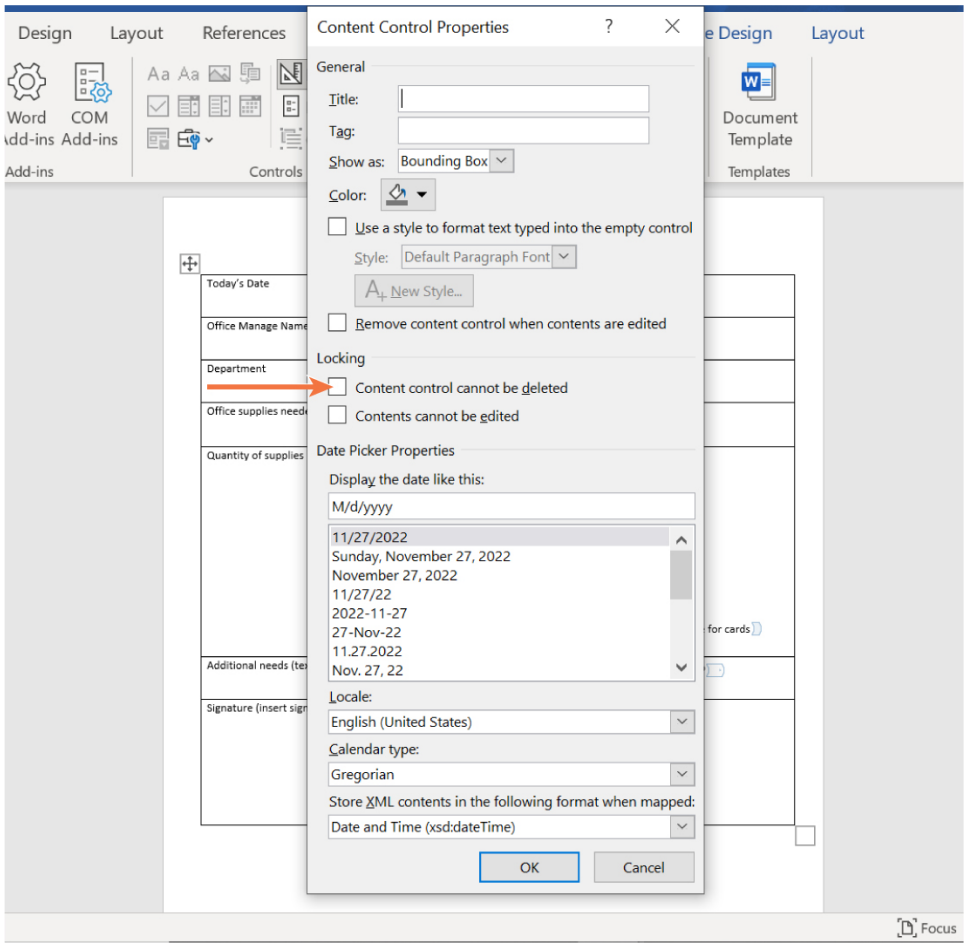


Figure 5.35: By checking the "Content control cannot be deleted" box, you can protect the field. (Used with permission from Microsoft)

For the multiple-choice questions, the drop-down lists, and the combo boxes, the setting up takes a little bit longer. You need to manually add the choices to the list for each question type. In your form, you need to write out the departments so that the office manager can choose the appropriate department. To do this, go to the Properties for the drop-down list (see Figure 5.36). At the bottom of the dialog box, locate the drop-down list properties. Here is where you will add the various departments. By default, the only option is Choose an Item. We need to remove this item and add the departments. Click on Choose an Item and select Remove from the options on the right. Now, choose Add to add each department.

Notice that the Display Name and Value Name are the same. There is really no need to change this, but you can change it if you want the respondent-facing choice to look different from what is actually logged as their response. For example, you could have the Display Name (i.e., what the respondent sees in the drop-down list) to say Accounting, but the actual Value that is displayed when they choose Accounting is "Acct."

Continue in this same manner to add all the departments as shown. If desired, you can change the order of the options in the list by choosing Move Up or Move Down (Figure 5.36). For a more professional look, consider placing the items in alphabetical order.

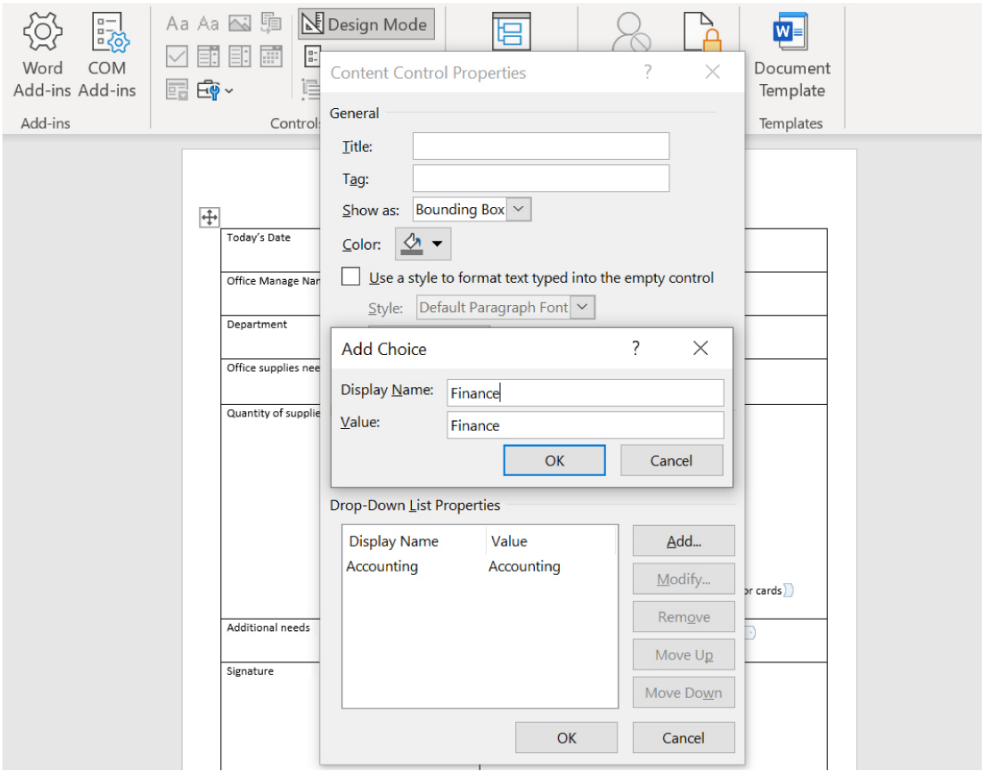


Figure 5.36: With a drop-down list, use Properties to define each of the categories in the list. Generally, the display name and the value should be the same. (Used with permission from Microsoft)

Finally, you need to format the checkbox field. As with the other control fields, you can change the font and style (see Figure 5.37). But with the checkbox, you can also change what type of symbol is used in the box. For example, you can choose a heart instead of an X for the form. To do this, choose Change next to Checked Symbol. Choose what type of symbol you want for the checked box (see Figure 5.38).

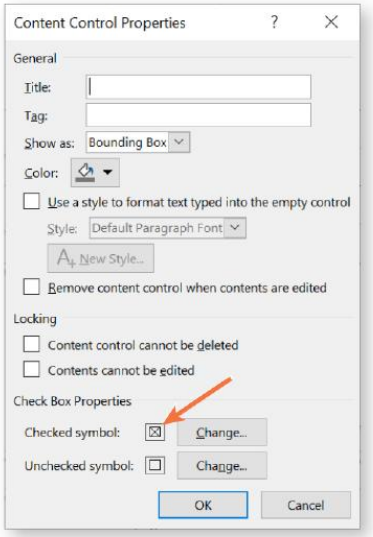


Figure 5.37: The default symbol for the checked box is an X. (Used with permission from Microsoft)

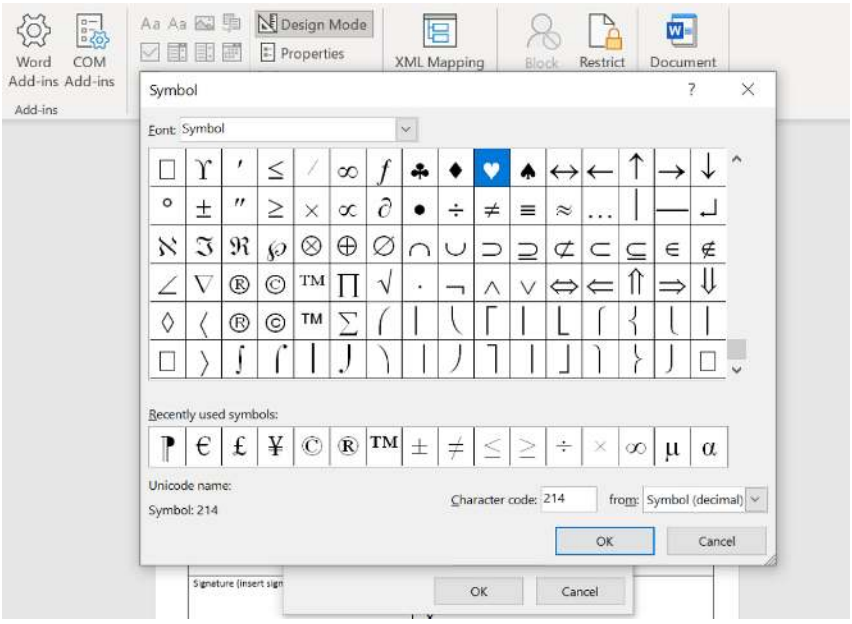


Figure 5.38: Choose Symbols from the drop-down menu in the Font field to find the heart. (Used with permission from Microsoft)

You could adjust the properties of each control field as you enter them into the document. However, it is often easier to add the fields first and then go back and make the needed customizations to each field with the Properties tool.

When you have finished formatting all the control fields, make sure you have saved the document. You can now turn off Design Mode by clicking the tool in the command group. Now is also a good time to add some visual elements to the form, such as the company logo or other elements to make the form more visually appealing. You should also remove the borders around the table. Figure 5.39 shows what the finished product might look like.

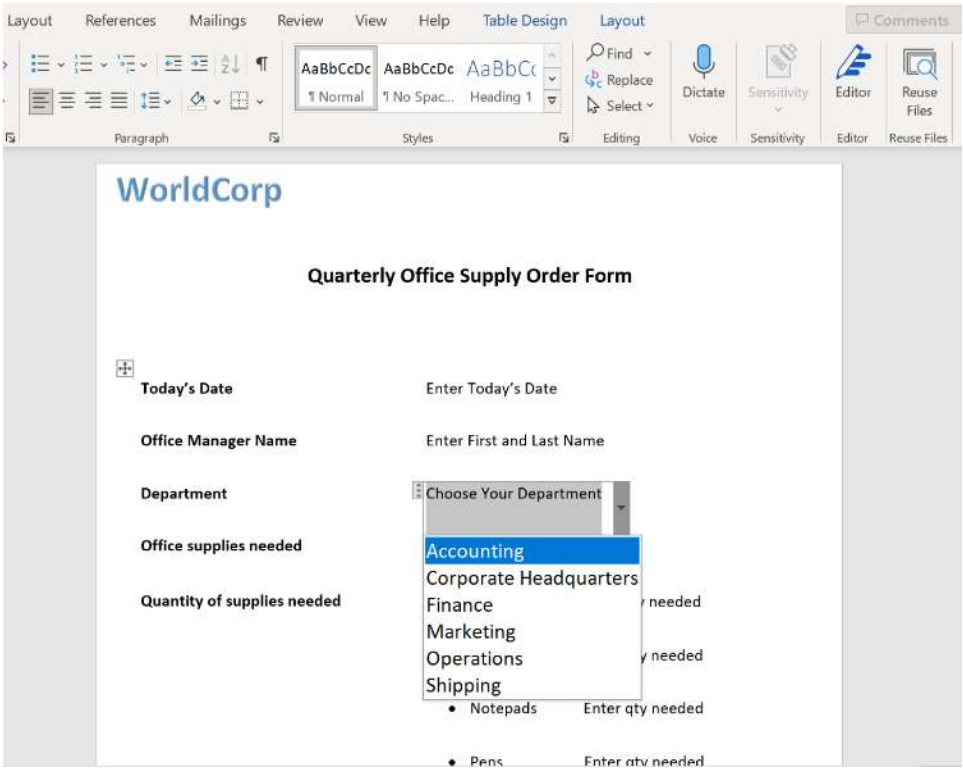


Figure 5.39: Notice that when the drop-down list is selected, the various departments show up. (Used with permission from Microsoft)

Protecting the Form

When you are finished with the form, you need to protect the file before sending it to the various office managers. This will ensure that they cannot edit the questions and controls—that they can only provide responses. The way to protect the document is similar to the process described in the Creating and Working in Documents chapter. To protect the document, select the Restrict Editing command from the Developer tab and a sidebar will appear. You can also access the Restrict Editing command from the Review tab. This sidebar will give you options for preventing editing from happening on the file, as shown in Figure 5.40.

When you send the file to others, be sure to send the file as an attachment to the email rather than sharing the document link. If you have saved this file in your OneDrive and share the document as a link, your original file will be changed. You should instruct them to save the file under a different name and to send the file back as an attachment.

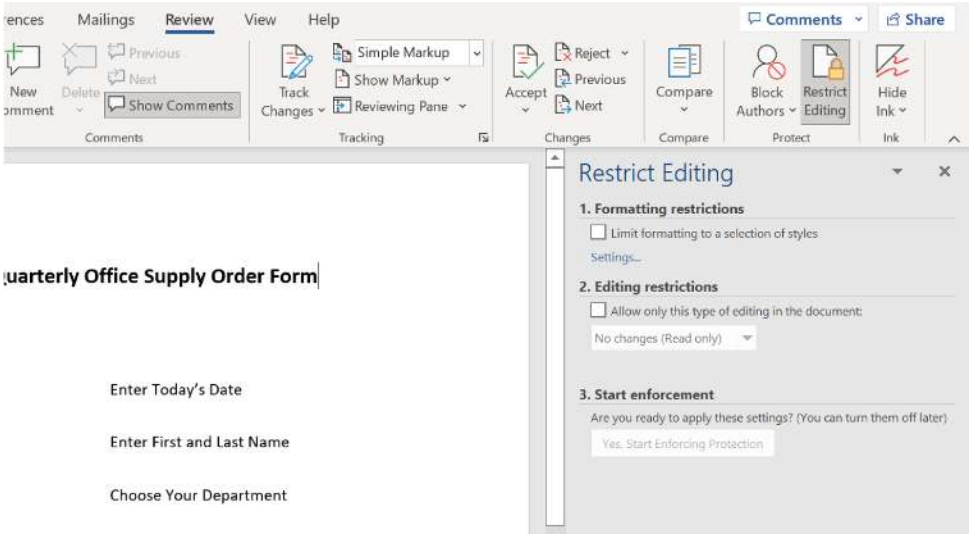


Figure 5.40: Before sending the survey form, you need to prevent clients from editing the document. (Used with permission from Microsoft)

Link to Learning

There are a lot of detailed privacy considerations when conducting surveys. A considerable number of laws are in place to protect consumers when participating in corporate surveys. Visit the Information and Privacy Commissioner of Ontario's Best Practices for Protecting Individual Privacy in Conducting Survey Research site to learn more.

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3.1.5: Collaborative Editing and Reviewing in Microsoft Word

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Learning Objectives

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

- Use the tools in the Review tab
- Use the Editor tool

To put together the market trends report, you will need to gather information from several departments. This information will likely include past sales data, information about current major vendors and customers, an evaluation of the major competitors, and other related content. To ensure the accuracy and integrity of the content, you want to have each department review the data specific to their sector. You also want to have the report reviewed by a peer colleague and your supervisor to ensure it is correct and of the quality expected. Word offers collaborative tools in the Review tab that make it easy to solicit, see, and implement feedback from other stakeholders.

Review Tab

The Review tab is vital for teamwork between collaborators of documents. Many documents are created in collaboration across functional departments, and each contributor to the document needs to record their changes and suggestions so others can review them. The Review tab also has several proofreading tools you might need for editing a document, such as a thesaurus.

Proofing Tools

As a student, you have probably been instructed to spell-check your work before handing it in. Word offers spell-check by simply selecting Spelling and Grammar on the Review tab. This tool will automatically check your spelling and grammar according to the dictionary and other language parameters in Word (which you can adjust from the default settings if desired). A dialog box will appear, and Word will give the option to accept or reject each of its corrections. It should be noted that spell-check will not always check when a word is misused.

For example, if you have typed “four” instead of “for”, spell-check will not indicate a misspelled word. The document creator will still need to proofread the document and not rely entirely on the Spelling and Grammar check tool.

Word gives its users many options for customizing their dictionary and language preferences. For example, you may frequently use the abbreviation “e.g.,” in your business documents, which means “*exempli gratia*,” or “for example.” If you don’t add this abbreviation to your Word dictionary, it may be labeled as a spelling mistake. “*Id est*” is another Latin term you might see, which means “that is to say.” After you add these words to your dictionary, Word will stop flagging them as an error (Figure 3.23).

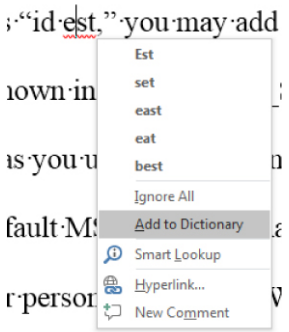


Figure 3.23: Adding regularly used new words to your dictionary will save you time when spell-checking a document. (Used with permission from Microsoft)

Another language customization feature is setting the proofing language. Word comes with dictionaries for several languages, as well as a variety of English dialects, including British, Canadian, Australian, Caribbean, Singaporean, New Zealander, and American English. After you set your preferred dialect, Word will check your spelling and grammar according to that dialect. For example, if you choose American English as your preferred dialect, the Spelling and Grammar tool will mark the word “favour” as an error and suggest the American spelling “favor.”

Comments

Comments are used for calling attention to any content in your document that you want to solicit input on or note for yourself. You can also use comments to flag spelling or usage queries, provide instructions to others reviewing your document, remind yourself to address something later like adding a graphic or fact-checking a statement, or ask questions about the content. To add a comment, select the segment of text in question, and then select New Comment from the Review tab, as shown in Figure 3.24. You can then type within the comment and click the arrow when you’re done to make sure the comment sticks.

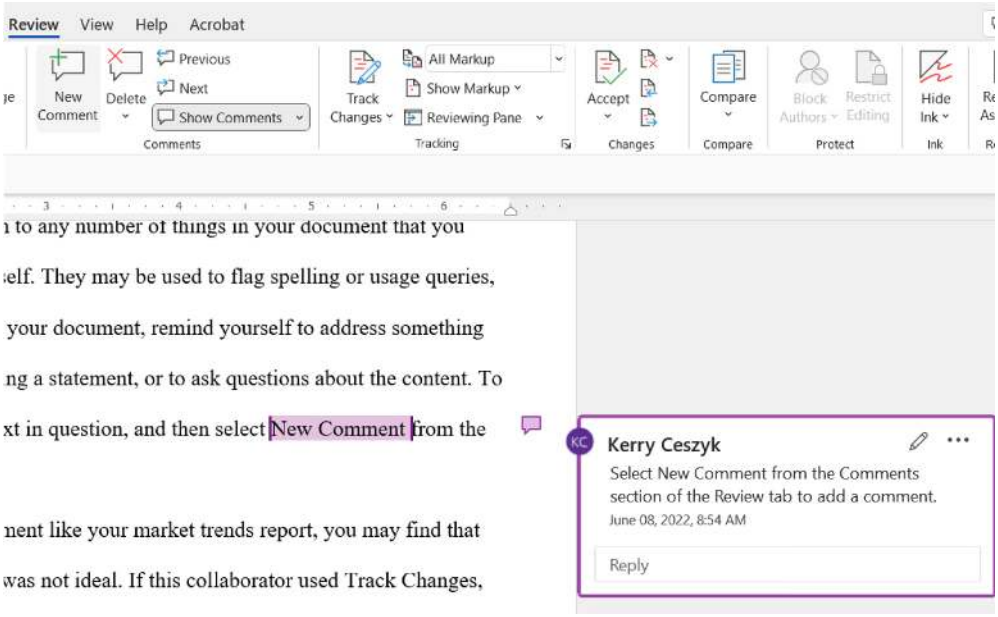


Figure 3.24: Comments can be used to communicate collaboratively within a document, or to add notes to yourself. (Used with permission from Microsoft)

When working in a document with comments, you can reply to any comment to add additional information or start a dialogue about a specific item. Once comments are addressed and are no longer needed in the document, you can either delete or resolve them, as Figure 3.25 shows. Deleting a comment removes it completely from the document, whereas resolving a comment retains the comment in a history stored digitally with the document.

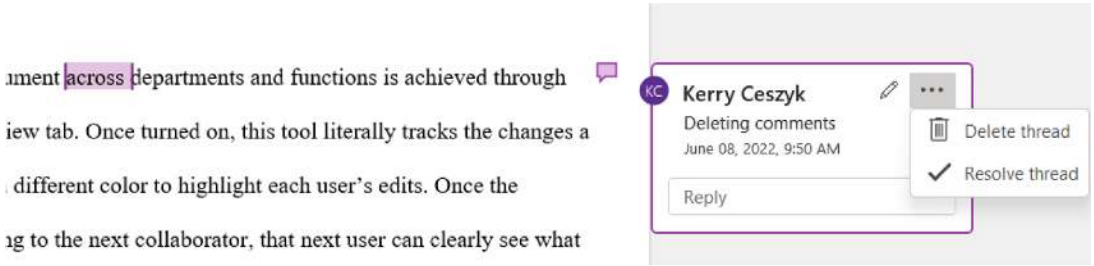


Figure 3.25: Comments can be either deleted or resolved when they are no longer needed. (Used with permission from Microsoft)

In a collaborative business document like your market trends report, you may find that another collaborator added content that was not ideal. The next collaborator or editor in the process could flag this content with a comment and send the document back to be revised. When the collaborator is done making the changes, you or they can resolve the issue.

Tracking Changes

The shared effort of writing a document across departments and functions is achieved through the Track Changes tool on the Review tab. Once turned on, this tool literally tracks the changes a user makes to a document, using a different color to highlight each user's edits. Once the document is saved and passed along to the next collaborator, that next user can clearly see what has changed from the original document. This makes collaborating on a document asynchronously—that is, not at the same time—easy to do.

Sometimes, you might work in a document that goes back-and-forth between you and one or two colleagues, and you review each other's changes and resolve comments at each pass. In other cases, all feedback may be collected and processed by one person. In the latter situation, after all collaborators have added their inputs to the document, a final author decides what changes are going to be kept for the final draft. This person might be a project manager or higher-level editor, depending on the workflow and organization of your company's editing process. This type of editing cycle—sending documents to various stakeholders for revisions and/or input—is common in many industries. An editing cycle may repeat multiple times before the document is finalized. Using Track Changes and comments allows for many iterations of the editing cycle, all while maintaining clear version history and control.

The Tracking command group offers options for which changes or markups are shown. You can toggle between No Markup and All Markup to see tracked and clean versions of a document (Figure 3.26). The Show Markup selections allow you to turn off Formatting revisions so you can focus more easily on content changes. There is also an option to turn on/off feedback from specific reviewers. These possibilities are helpful when you have a document with a lot of markup and want to focus on one area of input in particular.

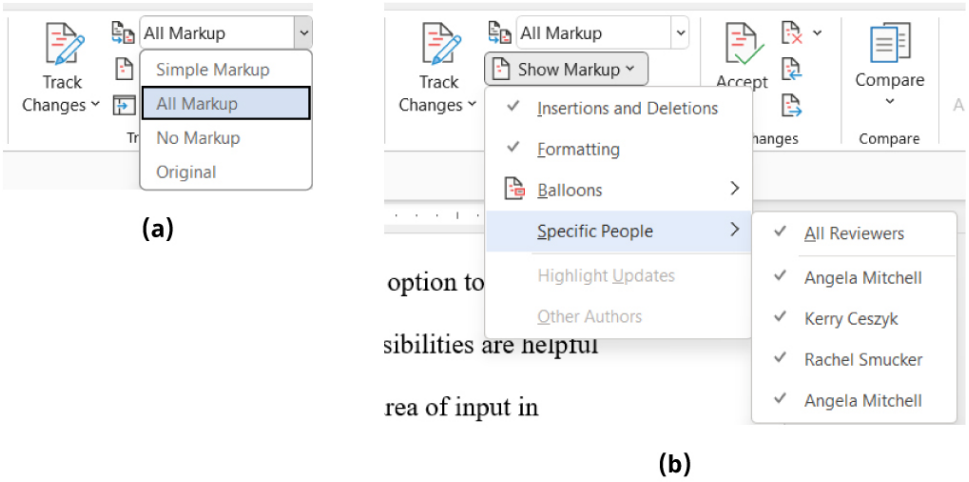
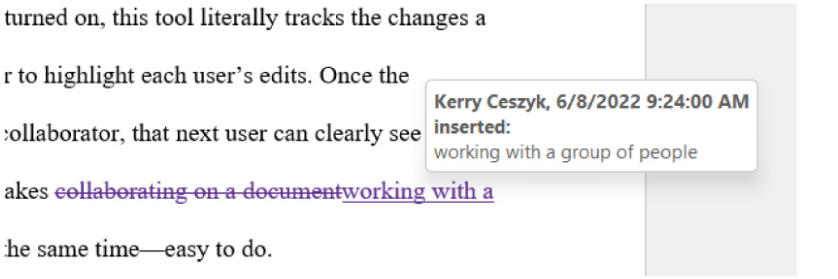
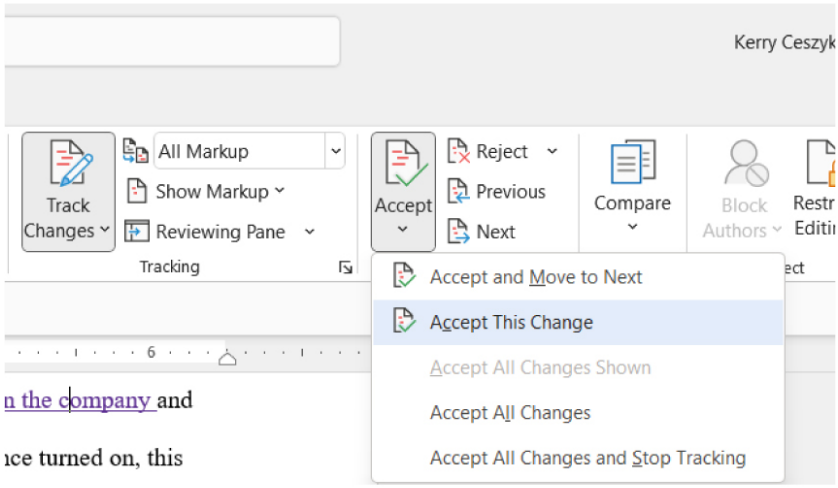


Figure 3.26: (a) Users can adjust how much markup they see, as well as (b) what types or markups are shown and which reviewers' feedback is displayed. (Used with permission from Microsoft)

Collaborators, or a final author, have the option to accept or reject each change that has been tracked. While reviewing changes, you can hover over any individual edit to see who made the edit and when, as shown in Figure 3.27. The Changes command group on the Review tab has the option of accepting or rejecting the various tracked edits as they are reviewed. You can also select to accept all changes in the document without reviewing them individually.



(a)



(b)

Figure 3.27: (a) Track Changes tells you who made a revision, and at what time, and (b) lets you accept or reject each suggested edit. (Used with permission from Microsoft)

Real-World Application

Résumé Peer Evaluation

A résumé is a summary of your work experience that you use when applying for a job. You might not have a résumé at this point, but you will probably need to create one in the near future. One option is to start with a template that you find online or in Word or Google Docs and create one on your own. However, you might consider starting at the career services office at your college. The career counselors in that department can help you craft a professional résumé for your job search. You will first be asked to develop a list of your previous jobs and the responsibilities that you had while working in those positions. Then, the career counselor will ask about what type of job you are looking for now and your career goals in general. All of these aspects will be reflected in the résumé you develop. The next step will be to create a first draft of your résumé. The counselor will likely give you some tips and maybe even a couple of examples to reference when creating your résumé. You can expect that your résumé will go through several edits and evaluations before you have a final product.

Both Word and Docs have the tools you need to get feedback on your résumé drafts from the career services department. You can share the file with others and have them insert comments or make revisions to your résumé. Through the tools in the programs, you are able to see revisions made, who made the revisions, and respond to comments. The collaboration tools in Word and Docs make it easy to get feedback so that you can create a polished résumé to help you secure the perfect job.

Protect

If you do not want certain collaborators to change a document, you may configure your document so that future readers of a document can change only certain components. In the Protect command group on the Review tab, select Restrict Editing. This will offer two types of restrictions that you can set, as Figure 3.28 shows. The first, Formatting restrictions, lets you specify which

elements of a document can be edited (see Figure 3.29). For example, you might allow editing only to the main text and not allow it to headers or tables. The second option, Editing restrictions, limits the level of editing others can do—from none, to commenting only, to only tracked revisions. Those restrictions can be further customized to allow different restrictions for different users.

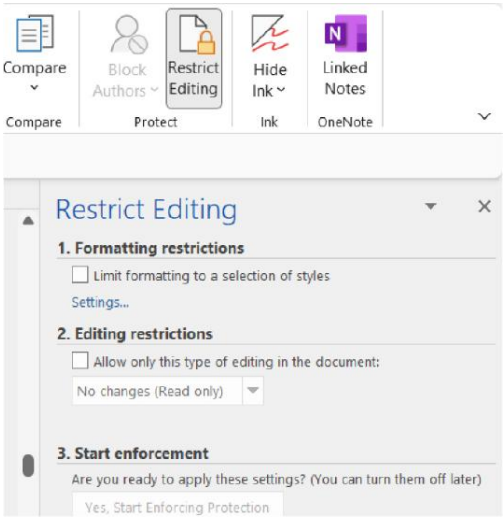


Figure 3.28: Document protections can be added by restricting editing to certain components of a document, or to limited levels of editing. (Used with permission from Microsoft)

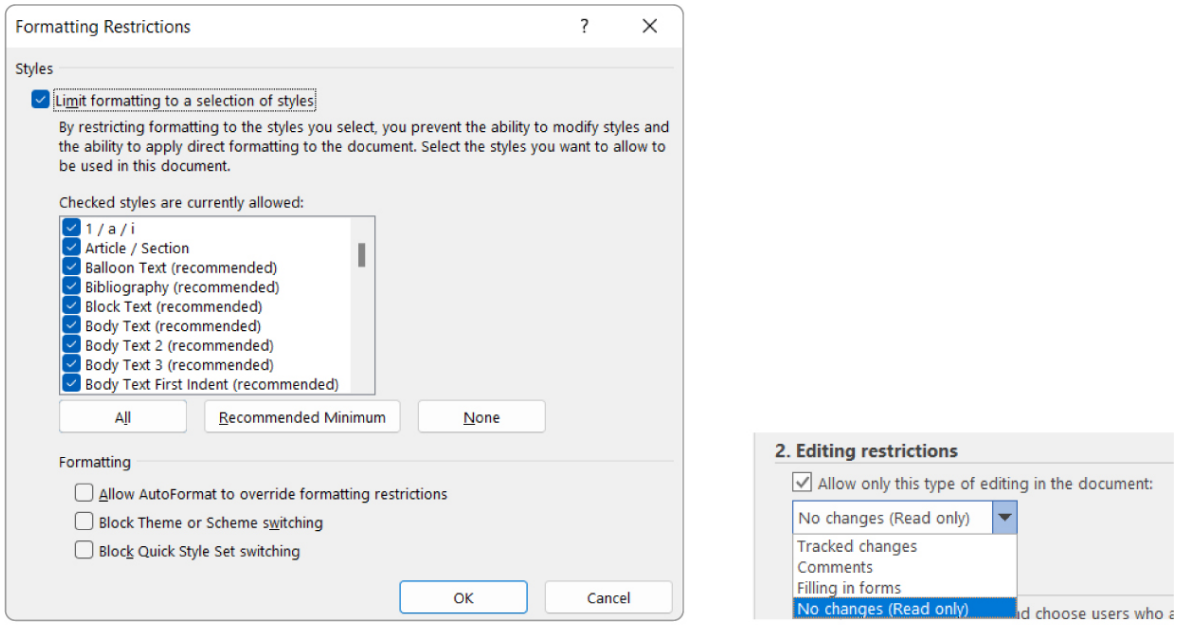


Figure 3.29: (a) Formatting restrictions can get quite detailed; however, they're important to set to keep your document's style from becoming inconsistent. (b) Editing restrictions for other users can range from allowing others to work freely, to work in Track Changes, or to "read only" and not make any changes. (Used with permission from Microsoft)

Mac Tip

Protect menu options on a Mac also include password protections, document review protections, and privacy. There is also a menu button for Always Open Read-Only.

Editor Tool

The Editor tool in Word adds another level of document support with a more comprehensive editorial review. Essentially, it is like a virtual editor, which goes beyond simple spelling and grammar checking. The Editor tool is on the Home tab and can also be found

on the Review tab. Simply click on the icon, and it will review your document and provide a report and score. You can set the Editor to review for formal writing, professional writing, or casual writing.

The Editor tool will check for spelling and grammar errors, as well as potential improvements, providing an explanation of the issue and a suggested revision (Figure 3.30). In addition to spelling and grammar, it will check for clarity, conciseness, formality, punctuation conventions, inclusiveness, vocabulary, conciseness, clichés, and many more. In fact, the Editor tool checks for over 150 different issues with readability in documents. For each item, it will give a rationale and suggested improvement that you can accept or reject.

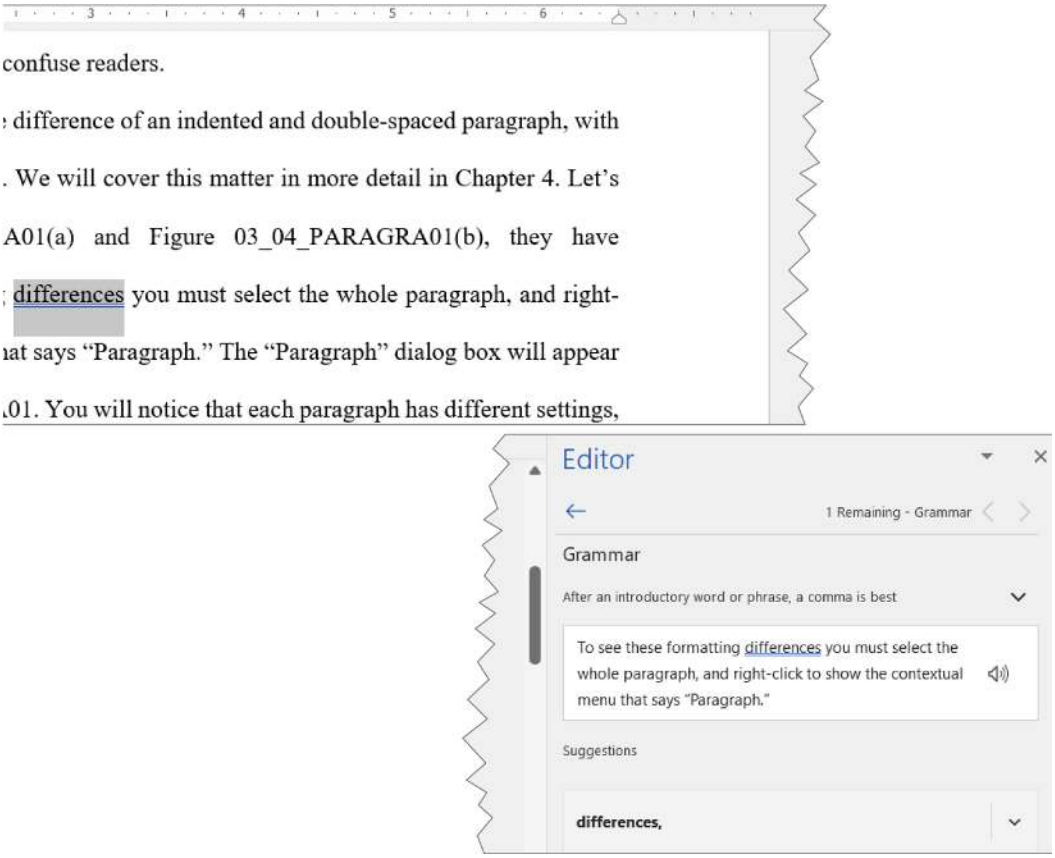


Figure 3.30: Editor will provide explanations and suggested revisions for errors of spelling, grammar, clarity, inclusivity, conciseness, and more. (Used with permission from Microsoft)

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3.1.6: Versions and Version History

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Learning Objectives

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

- Access and use versioning features in Google Docs
- Access and use versioning features in Microsoft Word

This section delves into a feature of Microsoft Word and Google Docs called versioning. Versioning refers to the technology where programs store multiple iterations of files until they are approved and saved. Essentially, several edited versions of the file are maintained on an online server, as well as the original document. Versioning technology can give you some peace of mind that your original document is saved somewhere, and that any changes will need to be accepted (approved) before the final document is saved.

There are many user-friendly options in Docs's versioning, as you can clearly see all of the changes created within each version, as well as the time stamps for when each version was made. With this versioning technology, your team can edit a document simultaneously, and everyone will see the changes happening and what changes were made before you started working with the document. You will also see when other collaborators add or edit the text. This sharing of the views of the document adds accountability to the work on the final version of the document. It can be used to enhance communication about the rationale for suggestions when comments are used. In Word, there are fewer options for accessing and using version history features, but they do exist if you keep your documents stored on Microsoft's cloud service, OneDrive, or on a SharePoint server.

When you are creating the market trends report, you will be sending the draft to key personnel in various departments to contribute to the report. Using these collaboration features will help as the document moves through each stage toward a final, accurate report.

Versioning in Docs

With versioning, you no longer have to worry about losing your files if your laptop battery dies. You do not have to be concerned if your program suddenly shuts down before you had a chance to save that last paragraph you typed. Docs has a feature that, as long as you are connected to the internet, autosaves every change you make to the file. There is no Save or Save As command because Docs is constantly saving in Google Drive, which creates version histories. This version history can be accessed by going to the File menu, then hovering over Version history, then selecting See version history. A sidebar will spring up to the right, as shown in Figure 3.64, listing many versions of the file, each with a time stamp and the name of the person or people using it at the time it was saved. With this Docs feature, it is not necessary to save multiple drafts of the same document. An alternative way to access the version history is by clicking on the title bar that says, Last edit was . . ..

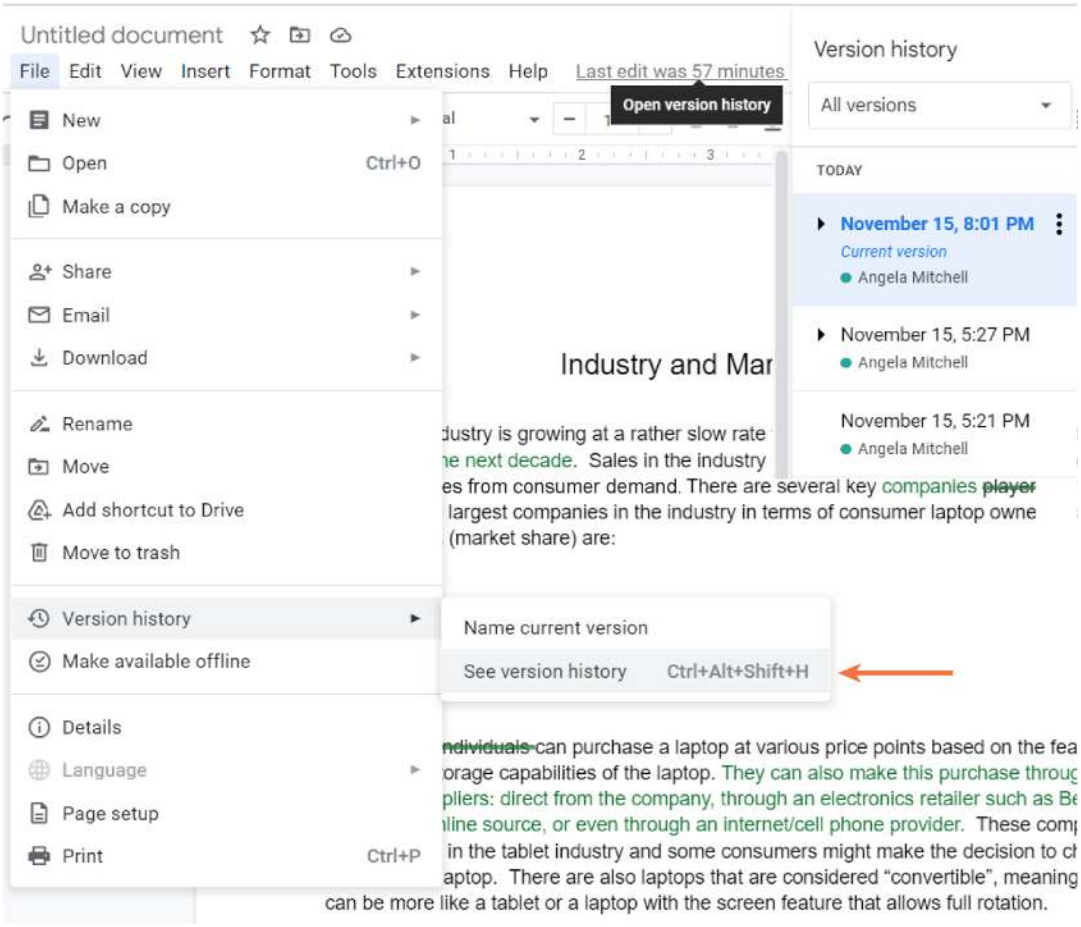


Figure 3.64: You can see the last edit of the document from version history. You can also access version history by clicking above the action bar. Version history is a Docs's feature that lets you see all your little changes in a document writing process. (Google Docs is a trademark of Google LLC.)

To quickly see new changes in a file, Docs has a See New Changes alert. It appears where the date normally appears, next to the Help menu. If you select that, you'll be able to see the recent changes from other editors—specifically, you will see all the changes that you haven't seen since the last time you opened the file. This functionality is useful for quickly and easily seeing changes from collaborators without having to access the version history.

Real-World Application

Is Transparency Always the Right Choice?

Suggesting mode in Docs and Track Changes in Word serve the same purpose: Both help teams collaborate and share documents. These functions also help teams maintain accountability on the document's grammar, usage, style, guidelines, and subject matter inaccuracies or faults. Google automatically logs the chain of events of the addition or editing of text by time and collaborator, tracking who made each change and when they did it. Between the Suggesting mode tool and Docs's version history, the person in charge of the document or team can monitor the progression of the document and increase the efficiency and speed of its completion.

When sharing documents between a client and a vendor, there could be concerns about access to all the information in the document or the version history. Similarly, a supervisor might not want an employee to see the comments and edits in a document summarizing their job performance and proposed salary increase until they are ready to present it to the employee. That information might be important for the human resources department to keep but does not need to be shared with the employee. So, although Suggesting mode and Track Changes can assist with transparency and accountability, it can also be problematic if information is shared to the wrong audience or before the document is ready to be shared with others.

> Now think about different circumstances in your life in which tracking changes and version history could be helpful, harmful, or both. How would you store your different versions?

Browsing Versions

In Docs, all these versions of the same file are organized by date, with the newest on top (Figure 3.65). The top version in the history is the most current and is open by default. You can check the date of the current version on the title bar, right beside the name of the file. You can check the name of the collaborator who made the edits by their name on the bottom of the time stamp, but also by the color of the circle next to the name, as each collaborator will have a different color circle. If multiple people worked on the file, their usernames will be listed below the time stamp, along with their color circle on the side.

The changes on the versions themselves are shown in highlighted font, similar to the Track Changes feature in Word. But unlike Track Changes, each editor's changes will not be identified with a different color. Just the changes overall will be highlighted. If you want to find out who made the changes, hover the mouse above the text you want to query, and the name of the collaborator will appear. If you don't want to look at this highlight, as it may be distracting, go to the bottom of the sidebar and uncheck Show changes.

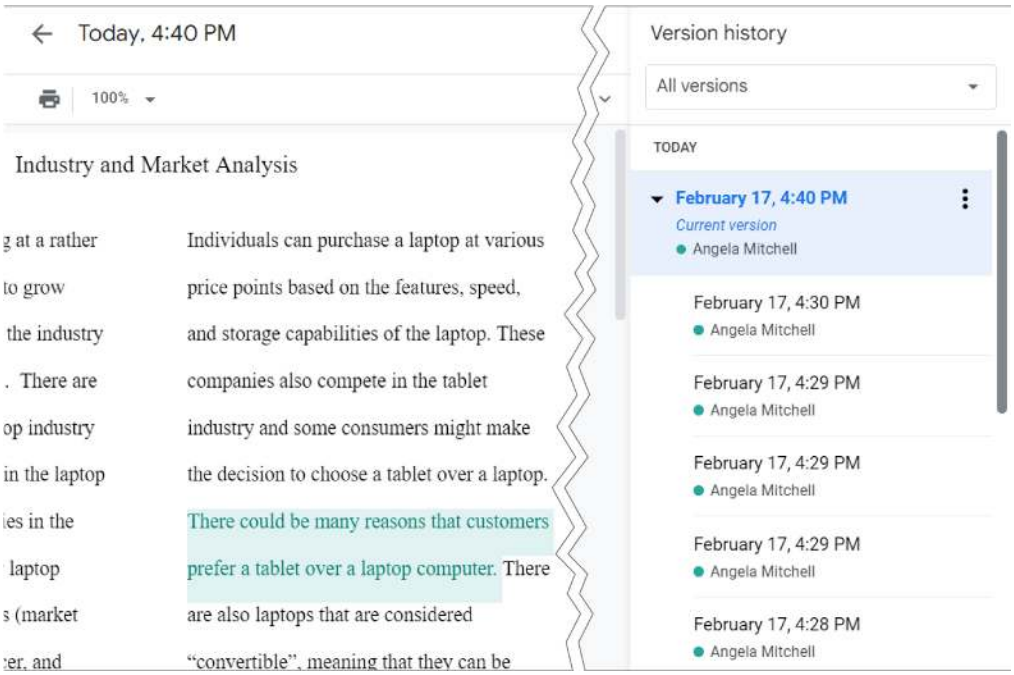


Figure 3.65: (a) You can check the date of the current version and the collaborator who made the edits. The changes are highlighted and show who made them. (b) If you want to find out who made the changes, make sure Show changes option is checked so you can hover the mouse above the text you want to query. (Google Docs is a trademark of Google LLC.)

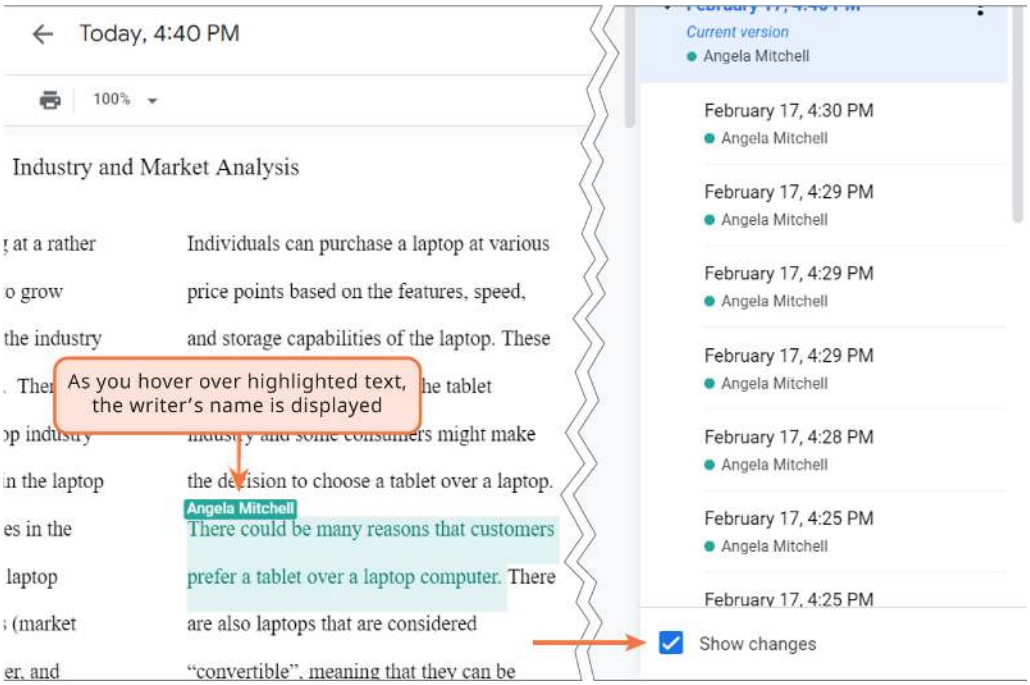


Figure 3.66: If you want to find out who made the changes, make sure Show changes option is checked so you can hover the mouse above the text you want to query. (Google Docs is a trademark of Google LLC.)

Naming Versions

In Docs, the versions do not have a name; they simply just show a time stamp. If you like a certain version and want to keep it for future reference, or if you want to save it because it shows the progress of the file, select that particular version and give it a specific name so that it's easy to find. Select the three dots next to the time stamp and a context menu will appear, from which you can choose to Name this version, as shown in Figure 3.67. As you finish typing the name, the time stamp will still appear, yet above it will be the name of that version. This will keep track of the important changes in a collaboration.

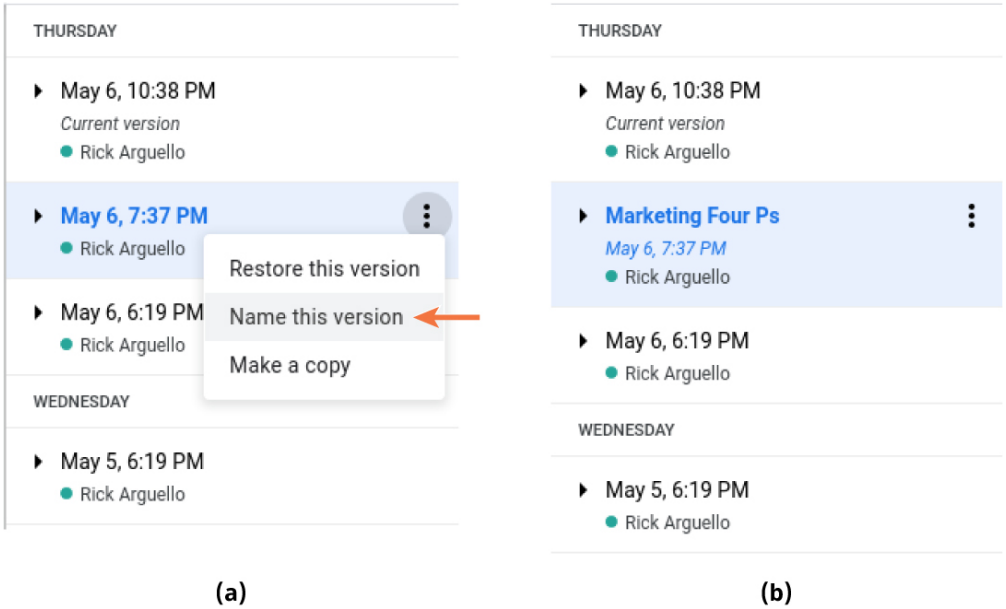


Figure 3.67: (a) Naming the version can be useful, as there are many steps and processes in completing a business report. (b) Here, the business report happens to be on marketing what are known as "the four Ps:" product, price, place, and promotion. You may learn about these in the workplace. (Google Docs is a trademark of Google LLC.)

To name the current version, go to the File menu, then Version history, then Name current version. Next, type the name of this version in the dialog box and click Save.

After you finish your document, you might have named some of the versions, and you might just want to see only the named versions on the Version History sidebar. You can toggle the unidentified versions on and off, on the top of the sidebar with the option Only show named versions, as you can see in Figure 3.68.

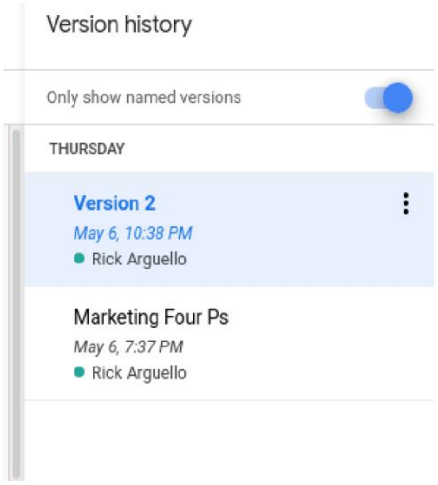


Figure 3.68: The named versions might be the most important or relevant ones. (Google Docs is a trademark of Google LLC.)

Making a Copy of a Version

To make a copy of a version, you will also use the context menu for the specific version. The menu has the option to make a copy, in which you can make a new separate file from this document. (It is like Save As in Word, in which you can save a version with a different file name.) If you use the Name this version command, you will not create a separate file; it will still be the same document. However, it may be better in some situations to have separate files with descriptive names to them, as you would with different saved Word versions of a document. Many companies have file naming conventions to help them keep track of versions, such as "project#_document_name, ver#", followed by the initials of the collaborators who made the changes (e.g., "WC05_Market_Trends_Report_ver1_AC").

Having copies of the same file, but as different versions, is an option if you want to download these versions to your business's computer desktop or hard drive, instead of keeping them online. Having a different version can also be useful if you want to send this version to a client or any third party. When a copy is made of any version of a document, it is saved as a new Doc, without the version history attached to it. The comments and suggestions are also not copied.

You might find that at some point, you would like to preserve some content from an older version, but not the whole document. In this case, you can go to the older version and look for the information that you want to keep, then right-click to show the context menu, and select Copy. Then, go to the newest version and place the cursor where you want the recovered paragraphs to be, and right-click to the context menu Paste. This will keep your newest version, while adding the older paragraphs.

In addition to saving a copy by the context menu of the three dots, there are other commands available in the list of versions. Right on top of the window of each version there are two different commands you can choose from, zoom in and print, as shown in Figure 3.69. Some people like to have hard copies of versions of documents for archiving purposes.

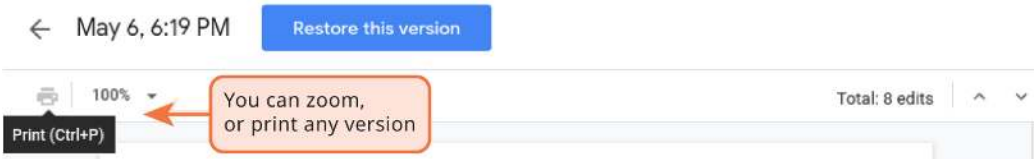


Figure 3.69: When browsing versions, you can always print a version you want save. (Google Docs is a trademark of Google LLC.)

Restoring Versions

There may be instances when you want to revert to a previous version of the document. This is called version restore. This could occur for a variety of reasons. For example, you might realize some key information that is now needed was in a previous iteration of the document. Your team could also agree that a previous version might be preferred after additional edits are made. This feature

of versioning in Docs can offer you some assurance that even if a document has gone through several stages, the previous work on the document is not lost and can be accessed through Restore.

On the main window, where the versions are being read, there is a notification on the top right corner displaying the number of edits of that particular session, as Figure 3.70 shows. Next to the number of edits are two arrows; these are toggles for viewing the session changes. The first change of the May 6, 6:19pm session was to change the date of the marketing report.

You can also restore a version without having it on the main window display by selecting the three dots beside the version and selecting Restore this version. The newer version will not be the current version anymore, as the older version now supersedes it.

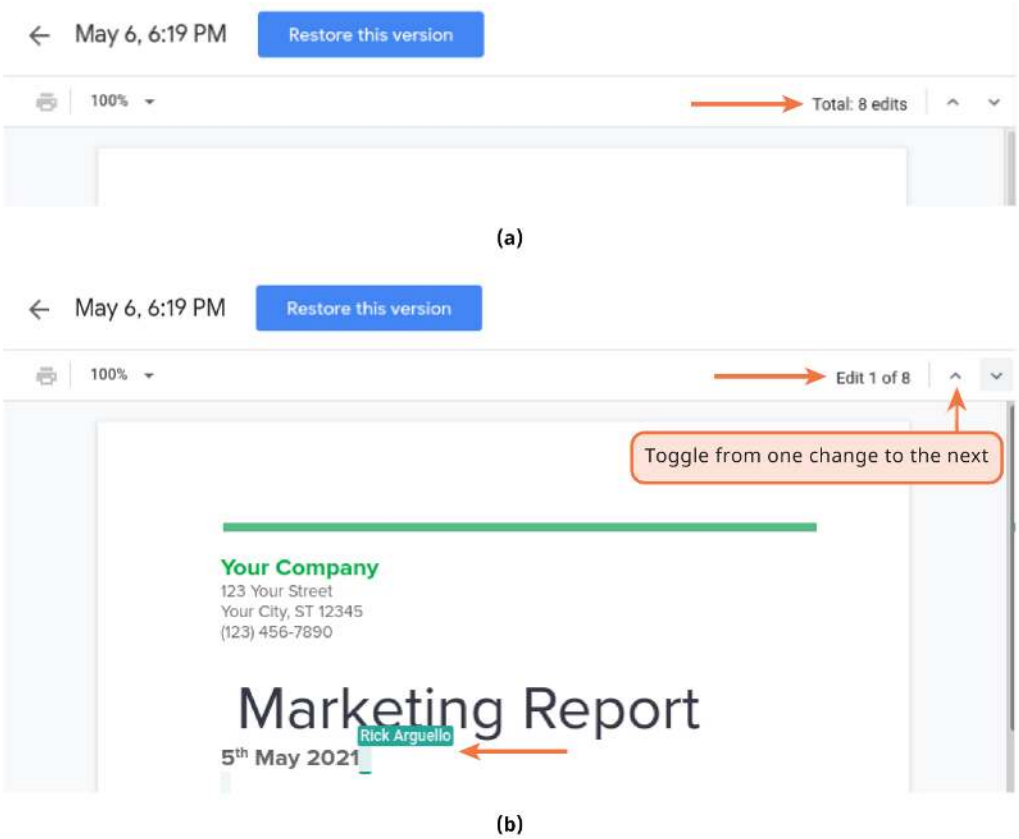


Figure 3.70: (a) Google keeps track of the number of edits in the document, as you can see on the top right. (b) You can use the arrows to move through the edits to determine if you want to keep the changes. (Google Docs is a trademark of Google LLC.)

If, after reviewing each change, you decide that one of the older versions is better than the current one, you can select the large Restore this version button at the top of the window (Figure 3.71).

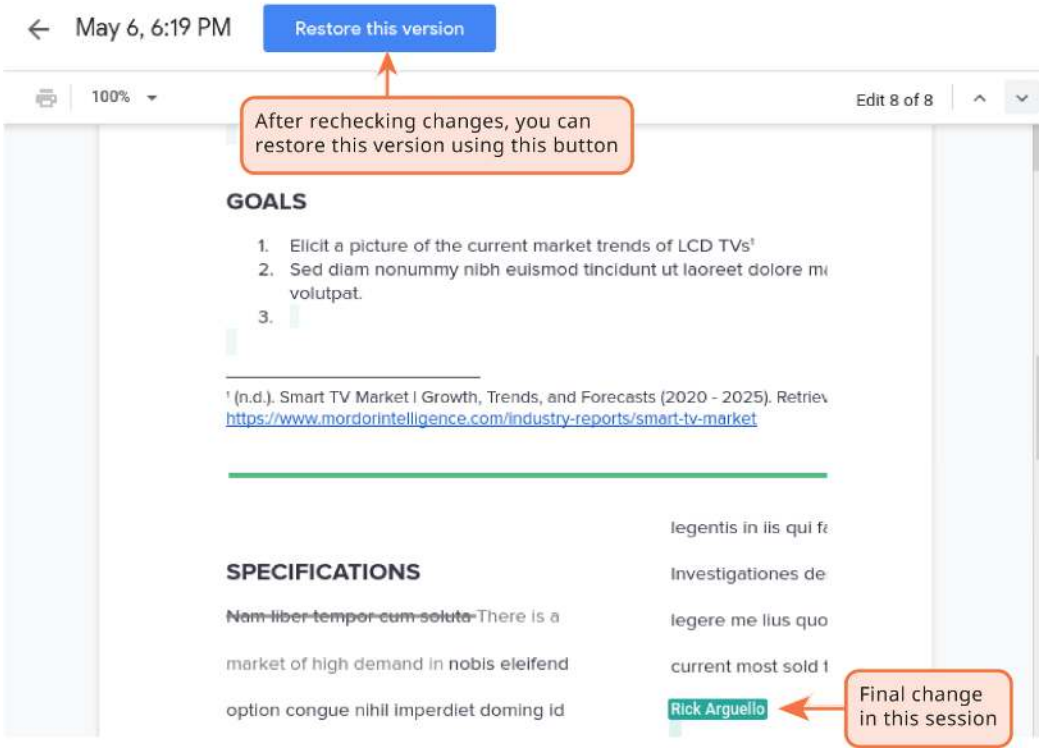


Figure 3.71: Google gives you the option also to restore the document to a previous version. (Google Docs is a trademark of Google LLC.)

Keep in mind that the number of versions displayed on the sidebar does not show all the versions available. If you go to the sidebar, you'll see that the time stamps are typically a certain length of time apart, as you can see in Figure 3.72. That means that there are hidden versions from when the editing was taking place. Each version has many changes that were happening seconds or minutes apart. You can access these micro changes in each session by clicking on the triangle on the left of the version.

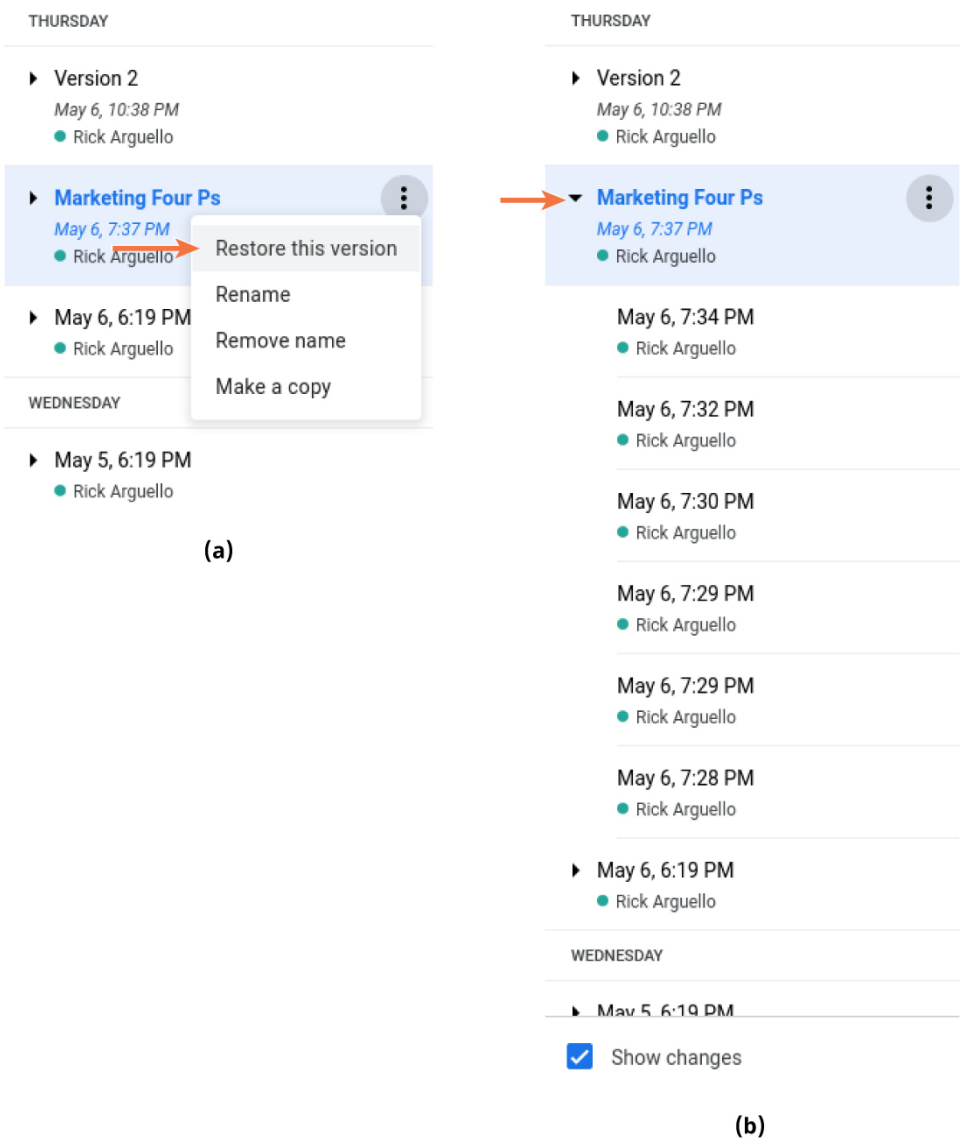


Figure 3.72: (a) The versions are both time and date stamped. (b) You can restore to a particular version, make a copy of the version, or rename the version. (Google Docs is a trademark of Google LLC.)

To quickly see new changes in a file, Docs has a See New Changes alert. It appears where the date normally appears, next to the Help menu. If you select that, you'll be able to see the recent changes from other editors—specifically, you will see all the changes that you haven't seen since the last time you opened the file. This functionality is useful for quickly and easily seeing changes from collaborators without having to access the version history.

Versioning in Microsoft Word

Microsoft Office has many options for accessing version histories but can be done only if the file is stored in OneDrive or SharePoint Figure 3.73.

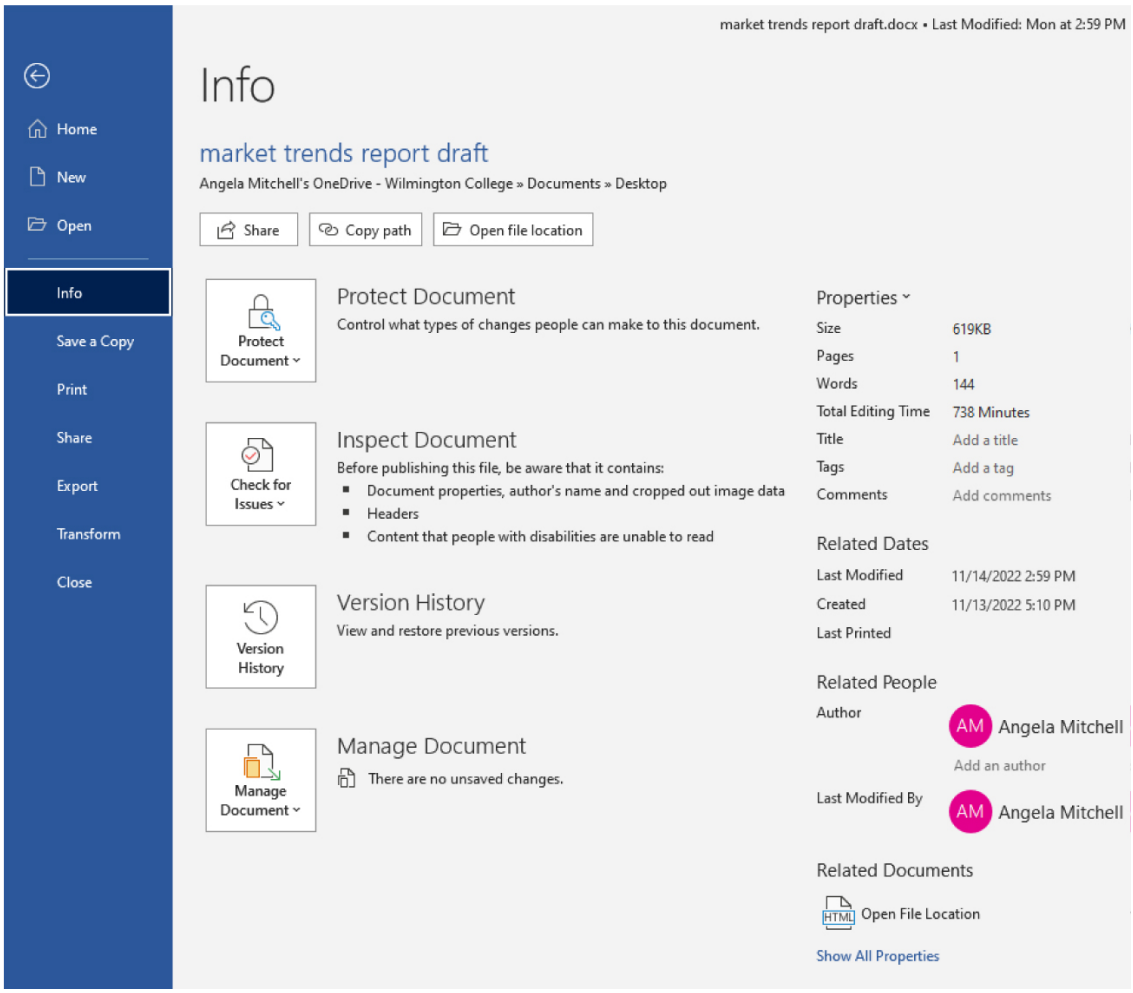


Figure 3.73: The version history in Microsoft Word desktop is activated if the document is located in OneDrive. (Used with permission from Microsoft)

If you have a desktop version of Word, you have to sign in to your Microsoft account. You will be able to access the last 25 versions of your file on OneDrive (that is, if your file is stored on OneDrive), as you can see in Figure 3.74.

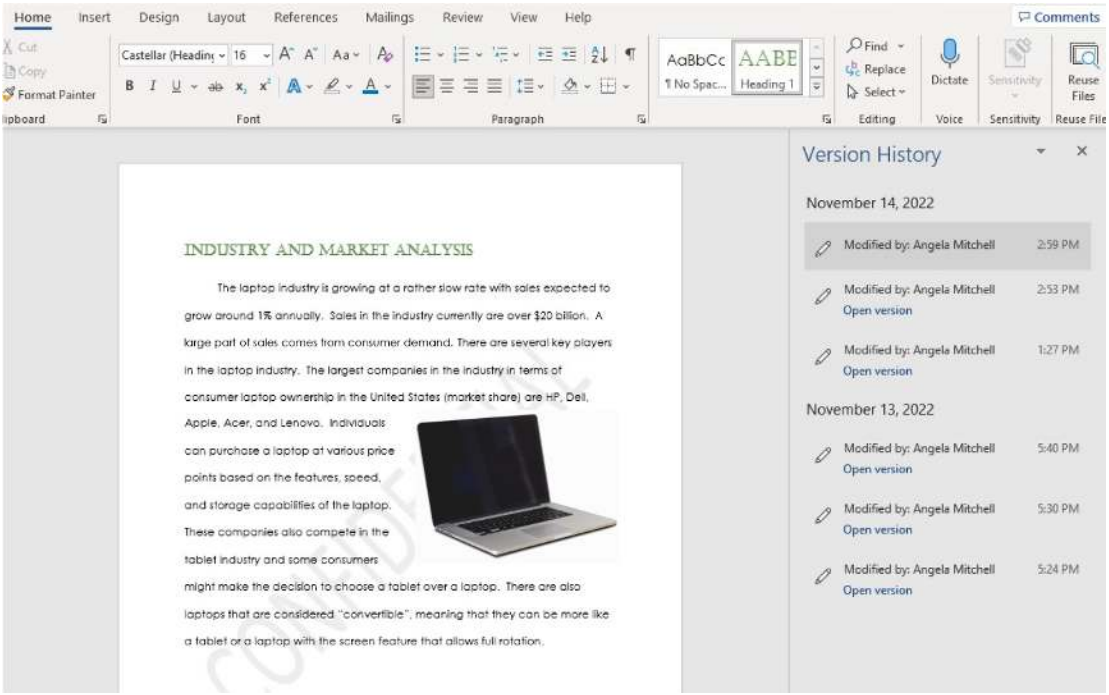
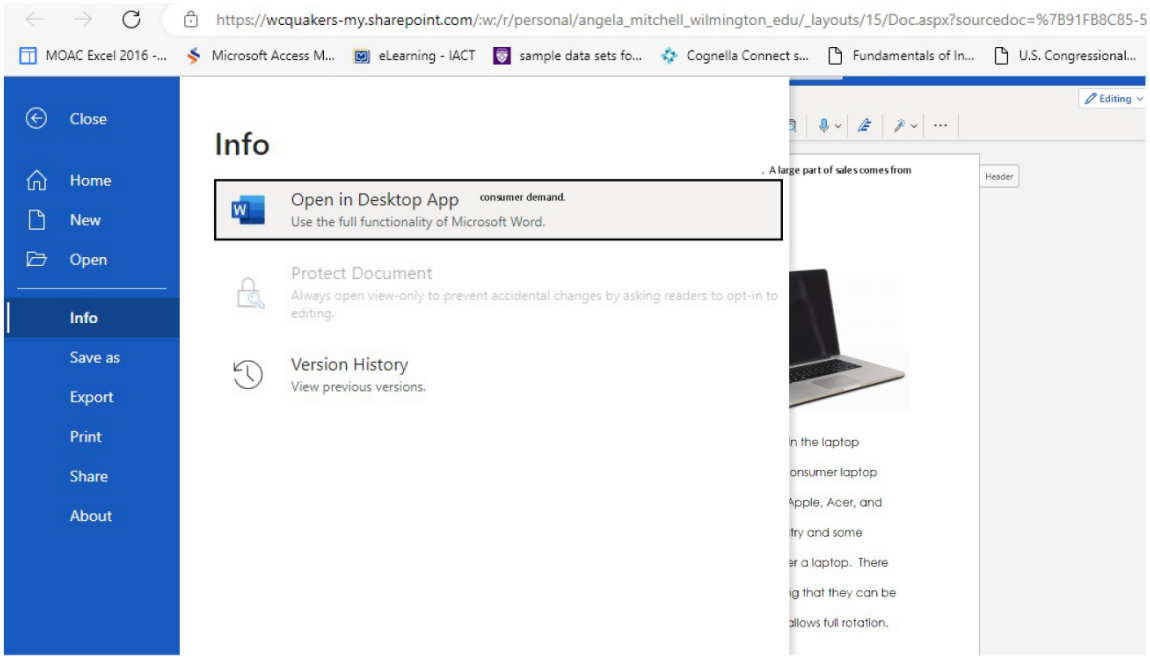
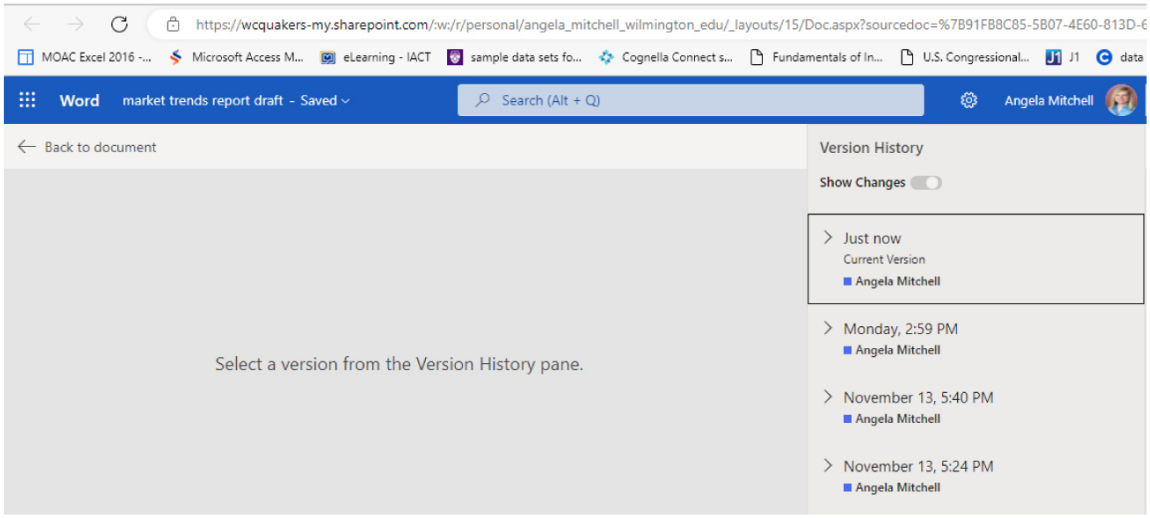


Figure 3.74: When you choose Version History from Info, you will see a pane open on the right side of the document with the versions that are saved. (Used with permission from Microsoft)

You can access your version histories in Word by going to the File tab and selecting History. If you have a Microsoft 365 Word subscription, you can access the version history by going to the File tab, then Info, followed by Version History. There you can see the versions available and browse through them. You can also choose to restore a previous version, as Figure 3.75 shows. Moreover, if you have SharePoint Server or SharePoint365, the possibilities of versioning are much more powerful, allowing as many as 500 versions to be retained, as you can track a version's history, view multiple earlier iterations, determine who can edit or write on the files, control the number of versions stored, and more.



(a)



(b)

Figure 3.75: (a) Microsoft 365 also has Version History that is also accessed through the File tab. (b) Select a version from the pane on the right to see that version of the document. (Used with permission from Microsoft)

Link to Learning

SharePoint is more pliable than Google Drive, but it is not free. Unless your company is paying for a corporate license, you would need to pay a fee per month per user for the standard version (Plan 1), and you would need to have the desktop Microsoft 365. The current plans are priced between $5 and $23 per month. Visit the Microsoft page comparing SharePoint plan options for more information.

If you want the Microsoft 365 applications integrated with SharePoint, you should choose Office 365 E3. This article gives you an idea of the additional capabilities SharePoint has and how users can benefit from versioning.

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3.1.7: Word and Excel Real World Applications

This page is a draft and is under active development.

📌 Click here to view Microsoft Word Overview and Emerging Features Chapter

Introduction

Communication and data are at the heart of decision-making, project management, and achieving goals in nearly every profession. Two of the most versatile and widely used tools that support these functions are **Microsoft Word** and **Microsoft Excel**. Together, they form the foundation of modern digital literacy — skills that remain essential across industries and career levels.

Word and Excel are far more than productivity software; they are the **language of business**. Word communicates ideas and intentions with clarity and professionalism. Excel transforms information into structured insight that supports analysis and decision-making. Whether drafting a proposal, tracking financial results, analyzing customer data, or documenting procedures, these two tools enable professionals to produce organized, measurable, and impactful work.

Even as technology evolves, Word and Excel have remained constant because of their flexibility and universality. They connect departments, bridge industries, and translate complex ideas into formats that others can understand. Learning to master both applications is not only about technical proficiency—it's about understanding **how businesses think, communicate, and operate**.

Microsoft Word: The Foundation of Professional Communication

Microsoft Word is among the most recognizable and influential **professional documentation and communication** tools. Its core purpose is to help individuals and organizations convey information in a structured, readable, and credible way. Word ensures that written communication aligns with the clarity and professionalism expected in today's workplace, from brief memos to complex reports.

Industry Applications

- **Education:** Instructors and administrators use Word to design course syllabi, research proposals, and curriculum plans. Students produce essays, research papers, and project reports formatted to meet academic standards, learning early how professional writing supports academic and career success.
- **Healthcare:** Hospitals, clinics, and medical offices rely on Word for documenting procedures, drafting patient summaries, creating compliance manuals, and producing policy documentation that must follow strict legal and formatting guidelines.
- **Legal Services:** Attorneys and paralegals use Word to draft contracts, legal briefs, and case documents. Features like Track Changes and version history allow multiple reviewers to comment and edit collaboratively while maintaining document integrity.
- **Corporate and Nonprofit Sectors:** Marketing teams use Word to create branded proposals, press releases, and client pitches. Human resources departments produce employee handbooks and performance evaluations. Nonprofits use Word for grant proposals and donor correspondence.

Word provides a professional framework for conveying **visually appealing and structurally sound** ideas. Tools like styles, templates, headers, and tables of contents help maintain consistency across multiple documents, ensuring that organizations present a unified and credible identity.

Equally important are Word's **collaboration features**. With Microsoft 365 integration, users can co-author documents in real time, comment on sections, and view tracked edits across devices. This collaboration improves efficiency and mirrors how modern teams work — distributed, digital, and fast-moving.

Strong Word skills enable professionals to create documents that are grammatically correct and **strategically crafted** to influence decisions, communicate clarity, and represent the brand or individual with professionalism.

Microsoft Excel: Transforming Data into Insight

While Word captures the narrative of a business, **Excel captures its numbers, patterns, and logic**. Excel is the universal platform for data organization, analysis, and visualization. Its ability to handle complex and straightforward datasets has made it a cornerstone of modern business operations — used by analysts, managers, executives, and entrepreneurs alike.

Industry Applications

- **Finance and Accounting:** Financial analysts use Excel to build budgeting models, calculate cash flows, and forecast revenue. Accountants track expenses, reconcile statements, and generate profit-and-loss summaries. PivotTables and formulas such as SUMIFS, VLOOKUP, and INDEX/MATCH allow efficient financial analysis and performance reporting.
- **Marketing and Sales:** Marketing professionals use Excel to analyze campaign metrics, calculate cost-per-click (CPC) and return on ad spend (ROAS), and visualize results through charts and dashboards. To inform strategy and resource allocation, sales teams track lead conversions, quotas, and customer engagement trends.
- **Operations and Supply Chain:** Operations managers depend on Excel to monitor production schedules, optimize logistics routes, and forecast demand. Conditional formatting can alert teams to low inventory levels or delayed shipments, enabling proactive problem-solving.
- **Human Resources:** HR professionals use Excel to manage employee data, calculate compensation, and analyze turnover trends. Excel provides transparency and accuracy for HR metrics used in strategic planning and compliance.
- **Education and Research:** Educators and researchers use Excel to track student performance, manage grades, and analyze survey or experiment data. Its functions for statistical analysis make it a reliable companion for early data exploration before transitioning to specialized software.

What makes Excel invaluable is its versatility. It can be used for everything from simple calculations to complex financial modeling, from one-person data management to enterprise-wide reporting. Excel's **visualization features**—charts, graphs, and conditional formatting—transform raw numbers into clear, actionable insights.

More advanced users leverage **automation tools** like **Macros**, **Power Query**, and **Power Pivot** to process large datasets and standardize reporting. In corporate settings, these capabilities save teams hours of manual work and enable data-driven decision-making consistently.

Ultimately, Excel bridges the gap between information and interpretation. It allows professionals to collect data and **understand what it means**, supporting decisions with measurable evidence rather than intuition.

The Interconnected Value of Word and Excel

While each application serves a distinct purpose, **Word and Excel are the most powerful**. A project manager may use Excel to calculate project costs, timelines, and risk analyses, then embed those tables and charts directly into a Word proposal or presentation. A marketing analyst might generate monthly campaign results in Excel and summarize key takeaways in a Word report to share with executives.

This integration reinforces a key professional skill: communicating **data-driven narratives**. Numbers alone do not tell a story; words alone may lack credibility without evidence. Mastery of both programs enables professionals to present complete, persuasive work — grounded in data and articulated with clarity.

Excel provides the **quantitative analysis**, while Word provides the **qualitative communication**. Together, they create the foundation of business intelligence and professional storytelling.

Why These Skills Are Essential in Every Industry

Across every career field, mastery of Word and Excel remains one of the strongest indicators of workplace readiness. Job descriptions across industries — from entry-level to executive roles — routinely list proficiency in Microsoft Office as a core requirement.

These skills are not limited to administrative roles; they are strategic.

- **In healthcare**, data entered and analyzed in Excel drives performance tracking, while documentation in Word ensures accuracy and compliance.
- **In finance**, reports created in Excel feed directly into client-facing documents formatted in Word.

- **Administrators** use Excel to track enrollment data and Word to prepare accreditation and grant materials in education.
- **In small business management**, owners often rely on Excel for bookkeeping and Word for contracts, proposals, and correspondence.

Excel and Word serve as the **connective tissue of digital workflows**. They unify departments, simplify collaboration, and allow individuals to translate data and ideas into formats everyone can understand.

Employers recognize that individuals with strong Word and Excel skills can complete tasks efficiently and contribute meaningfully to projects that rely on organization, precision, and analysis.

Looking Forward: The Future of Productivity with AI and Microsoft Copilot

While Word and Excel remain timeless tools, how we use them is entering a new era. Integrating **artificial intelligence (AI)** — particularly through **Microsoft Copilot** — transforms how professionals create, analyze, and communicate information.

Microsoft Copilot combines the familiarity of Office tools with the power of large language models (LLMs), allowing users to interact with data and documents using natural language. Imagine typing a request like:

“Summarize the key financial trends from last quarter and draft a summary report.”

Within seconds, Excel can generate an analysis, and Word can produce a professionally formatted report ready for review. This marks a dramatic shift in workplace efficiency — from manual entry and formatting to **strategic guidance and review**.

However, this new level of automation doesn’t eliminate the need to learn Word and Excel. It heightens it. AI can only assist effectively when users understand **how data should be structured**, **how formulas and logic work**, and **how professional communication should sound**. The more you know the underlying mechanics of these tools, the more value you can extract from AI enhancements like Copilot.

In the coming years, professionals who combine **strong foundational skills** in Word and Excel with **AI fluency** will be among the most in-demand in the workforce. As industries increasingly rely on automation and data intelligence, those who can manage both the creative and analytical sides of productivity will shape the future of business communication and data-driven strategy.

Learning Word and Excel today is not only about mastering two applications — it’s about preparing for a future where **human insight and artificial intelligence work together** to enhance productivity, creativity, and decision-making across every industry.

> *Version Note: The examples and screenshots in this textbook are based primarily on the Microsoft 365 versions of Microsoft Word and Microsoft Excel. While the core concepts apply to most recent versions of Microsoft Office, the appearance of menus, icons, or Ai assisted features such as Copilot may vary depending on the version installed on your computer.*

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3.1.8: Microsoft Word Terminology

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Word Terms

Flip each card to see the definition.

Alignment guide

Turn

Card 1 of 55

Reuse <> Embed

action bar	toolbar, located beneath the menus, that contains the more frequently used tools in Docs
Alignment guide	a green vertical or horizontal line that displays when you are moving or sizing an object to assist with proper placement
Artistic effects	formats applied to images that make pictures resemble sketches or paintings
bookmark	tool that lets the user connect different parts of the document using links
Bulleted list	a list of items in no particular order that are preceded by a bullet for emphasis and organization
Cell	the intersection of a row and column in a table
Check box	a small box that can be clicked to indicate a check is turned on or off to indicate an on or off response
checklist	type of bulleted list that adds a checkbox to the beginning of each line
Cover letter	a letter of introduction that highlights key points in the resume that follows
drop cap	when the first letter of the first sentence in a paragraph is in a large, stylized font
Ellipses	informally as dot-dot-dot, is a series of dots that indicates an intentional omission of a word, sentence, or whole section from a text without altering its original meaning. When selected, additional options appear
Em dash	a punctuation symbol that indicates an explanation or emphasis
endnote	note or citation at the end of the document
Field	placeholders that store and display data, and can perform simple tasks like returning the page number or current date and time
footer	bottom part of the page within the bottom margin, which you can see and configure in Print Layout viewing mode
footnote	note or citation at the bottom of the page
Format Painter	tool in Word that lets you copy the formatting of one area of a document to another area of the same or other file
Formatting marks	characters that display on the screen but do not print, indicating where the Enter key, the Spacebar, and Tab key were pressed, also called non-printing characters
header	top part of the page within the top margin, which you can see and configure in Print Layout viewing mode
heading	key term or phrase that describes the content in a section of the document; can be used to generate the table of contents
hierarchy chart	type of chart that visualizes the chain of command or supervision at an organization
Indentation	specifies the distance between where the lines in a paragraph start in relation to the left or right margins
Inside address	the name and address of the person of business who received the letter, positioned below the dateline
Keyboard shortcut	one or more keys used to perform a menu function or other common functions
landscape	horizontal orientation of a page so that it is wider than it is tall
Layout options	picture formatting options that control the manner in which text wraps around a picture or other object

Leader	the space between tab stops can show a line, dots, or dashes to line up information and guide the reader
Letterhead	the heading at the top of a sheet of letter paper that typically includes name and address or company logo
line spacing	spacing between lines of text in a document
Lock anchor	a feature in word that allows you to move your image to any position on the same page as the anchor paragraph which forces the object to stay in that position
margin	edges of the document page that are left blank
Mini toolbar	appears whenever you right-click text in Word, Excel, or PowerPoint and provides a quick-access version of the Font group on the Home tab, plus a few extra buttons from other groups
multilevel list	type of list that has hierarchical levels with different bullet styles for each level
Navigation pane	Word feature that lets users view documents as thumbnail pages or outlines, or to search for specific text within a document
Newsletter	a printed or electronic report containing news regarding updates for an organization or business and is sent to interested parties
One-click Row/Column insertion	a feature in Word tables that allows users to insert a new row or column by pointing to the desired location and then clicking once
Page border	a decorative border that appears outside the margins on each page and can be solid, dashed, or an artistic style
page numbering	ability of Word to number your pages in documents; they can be in the header or in the footer
Paragraph Styles	Google formatting tool similar to Word's Styles; used to create headings and apply document-wide formatting so that you can generate a table of contents (and document outline)
Pictures	images or graphics that are stored locally on a computer or flash drive and can be uploaded to a document to add visual interest
portrait	vertical orientation of a page so that it is taller than it is wide
Present online	a Word feature that allows you to share your documents online using a web browser
process chart	way to represent a multistep process in a document; it shows the steps in the process, the order in which to do them, and the dependencies for an outcome
proofreading	process of checking a document for spelling and grammar mistakes
Quick access toolbar	located above the Ribbon (top-left) and provides access to commonly used features and commands, such as Save and Undo/Redo, and is customizable
Quick styles	an efficient way to add effects to a picture such as a shape, border, and other effects
reference	method of giving credit to the texts and other sources you used to furnish your document with information or data
Resume	a formal document that provides an overview of professional qualifications for an employment opportunity
Resume assistant	a feature in Word where you can see suggestions from LinkedIn to enhance your resume
sans serif	type of font that does not have short lines at the end of each part of a letter; considered easier to read in large blocks of text
Save As dialog box	allows the user to specify the drive, directory, and name of a file to save their file

Screen clipping	allows you to capture an image from your screen
section	partition of a document used to apply different formatting to different sections of text
serif	type of font that has short lines or embellishments on the ends of the parts of each letter
Shape effects	a grouping of coordinating effects that can be applied to a shape including shadows, glows, reflections, soft edges, bevels, and three-dimensional (3-D) rotations
Shape outline	allows you to change the outline color, weight (thickness), and style of the outline surrounding a shape
Shape styles	allows you to apply preset colors and effects to quickly change the appearance of your shape
Shapes	Lines, arrows, stars, banners, ovals, rectangles, and other basic shapes with which you can illustrate an idea, a process, or a workflow
Sharpen/Soften	a way to enhance picture details or make pictures more appealing by removing unwanted blemishes on a picture
Small caps	an attractive font in which no lowercase letters are used, yet the height of lowercase letters are maintained
SmartArt	tool in Word that lets you design organizational charts or flowcharts
Special character	normal characters that don't appear on standard keyboards; but once inserted into a Word doc, they look the same as keyboard characters
Spelling and grammar check	identifies spelling and grammatical errors and provides suggestions for correction
Square text wrapping	the manner in which text displays around an object
style	tool in Microsoft Office that is used in conjunction with the Themes tool; it lets the user customize a theme's color, font, and font size
symbol	special character not found on the keyboard such as currency symbols or Greek letters
Tab indicator	a button to the left of the ruler that provides tab marker options
Tab stop	the horizontal position which is set for placing and aligning text on a page
Table	an arrangement of information organized into rows and columns
table of figures	list of graphs, tables, or images that are in the document
Tags	any word, phrase, or number string related to the file that may help you locate the file later
Text box	a moveable, resizable container for text or graphics
Text effects and typography	decorative formats, such as shadowed or colors that make text stand out
text wrapping	feature in Word that allows the user to insert an image or object, and have the text wrap around it in the way that the user decides
Theme	tool that lets the user change the color scheme of an entire document
title page	cover page of a document
Toggle button	a button that can be turned on and off by clicking it once to turn on, and clicking again to turn it off
Track Changes	feature in Word that records what changes different users make to a document, allowing a group of people to collaborate in writing and editing the same document
Trust Center	part of Word's configurable options, which lets you personalize your privacy settings
version restore	feature in cloud server services like Google Drive and OneDrive that allows the user to restore

	previous versions of their document
versioning	technology where programs store multiple iterations of files until they are approved and saved
watermark	text or image that is placed on the background of pages
Word processing	the act of using a computer program to create, edit, and print documents
WordArt	gallery of text styles that you can add to your publications to create decorative effects, such as shadowed or mirrored (reflected) text

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