WORD 2016

Creating Reports

In this chapter, you will create a simple report. Reports are important documents often used in business and education to distribute information, communicate ideas, and share viewpoints and plans on a variety of topics. You will format your report using tabs, indents, margin changes, and headers and footers. You will also learn about AutoCorrect and how to use it to insert frequently used text by typing a few characters.

LEARNING OBJECTIVES

- Work with columns and set margins
- Apply styles
- Insert headers and footers
- Use AutoCorrect to insert customized text

CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs
- Self-Assessment: 20 mins
- Total: 2 hrs 20 mins

PROJECT: RESEARCHING SOCIAL MEDIA AND INTERNET COMMERCE

My Virtual Campus is a social networking technology company. It sells web applications to colleges and universities. Your marketing manager, José Morales, has asked you to look into the latest trends in social media in schools. It is important to understand how the "always connected" generation is using technology in the pursuit of education. Your manager also wants you to download an online article regarding social media in education that he can distribute in the next staff meeting. And he wants you to make the article's dense text more readable by using heading styles, headers and footers, and white space.

Creating a Business Report

When writing a business report, you want it to be easy to read. Dense blocks of text are difficult to read, so break up your report with lists, headings/subheadings, and white space. Use a clear, easy-to-read font, such as Calibri (Word's default font), Arial, or Times New Roman. Here are some principles of communication you may want to keep in mind when writing a report:

- Plan before you write.
- Know your audience.
- Use active voice.
- Avoid wordiness.
- Use plain language; avoid overblown words.

- Don't use clichés.
- Use parallel structure.
- Edit out anything that doesn't add to your meaning.
- Chunk your writing into short sections.

Setting Margins

Margins determine the amount of white space around the edges of the page. You can set margins for the entire document, a section, or selected text. The default margins in the Blank Document and Single Spaced (Blank) templates, as well as many others, are one inch all around. You can choose from a gallery of preset margins, or you can set your own custom margins.

≡ Layout→Page Setup→Margins

Indenting Text

Indents offset text from the margins. You can set indents by using the buttons on the Ribbon or by adjusting the indent markers on the ruler. The Increase and Decrease Indent buttons adjust the indent of an entire paragraph (or one or more selected paragraphs) and affect the left indent only. They adjust the indent based on the default tab stops, which are set at every half inch.

You can set custom indents by dragging the indent markers on the horizontal ruler.

First line indent

Hanging indent

Left indent   Right indent
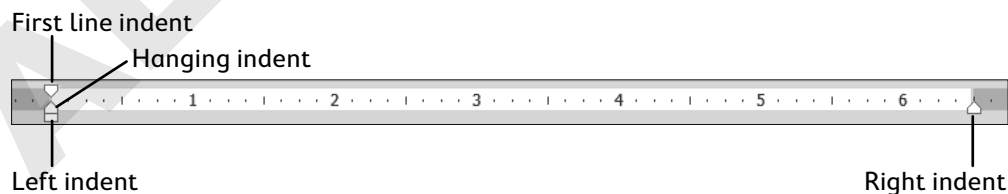
View the video "Indent Markers."

≡ Home→Paragraph→Increase Indent *or* Decrease Indent

DEVELOP YOUR SKILLS: W4-D1

In this exercise, you will increase the margins in a report to provide a little more white space. You will use the Increase Indent button on the Ribbon to offset quotes in the report, and you will create your own custom indents using the indent markers on the ruler.

1. Open **W4-D1-SocMediaRpt** from your **Word Chapter 4** folder and save it as **W4-D1-SocMediaRptRevised**.

2. If necessary, choose **View→Show→Ruler**.

3. Choose **Layout→Page Setup→Margins** and notice the preset margin settings.

4. Choose **Custom Margins** at the bottom of the menu.

5. On the Margins tab of the Page Setup dialog box, change the left and right margins to **1.5"** and then click **OK**.

Margins			
Top:	1"	Bottom:	1"
Left:	1.5"	Right:	1.5"
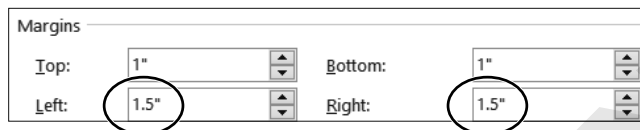
6. Below *The Net Generation* heading, select the second and third paragraphs, which are inside quotation marks.

7. Choose **Home→Paragraph→Increase Indent**.

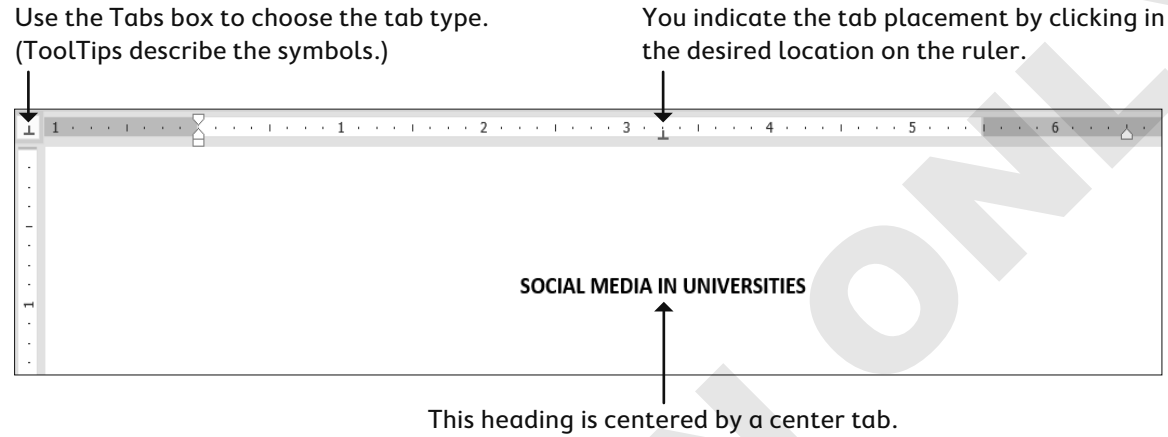8. Follow these steps to adjust the left and right indents:
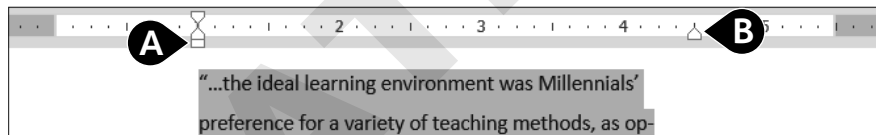
Ⓐ Position the mouse pointer on the Left Indent marker (bottom rectangle) and drag to the **1"** mark.

Ⓑ Drag the **Right Indent** marker to the **4½"** mark.

9. Save the report.

Setting Custom Tab Stops

Default tab stops are set every half inch, so the insertion point moves a half inch whenever you tap [Tab]. You can customize tab stops if you want other settings. You can delete a custom tab by dragging it off the ruler with your mouse. When you release the mouse button, the tab disappears.
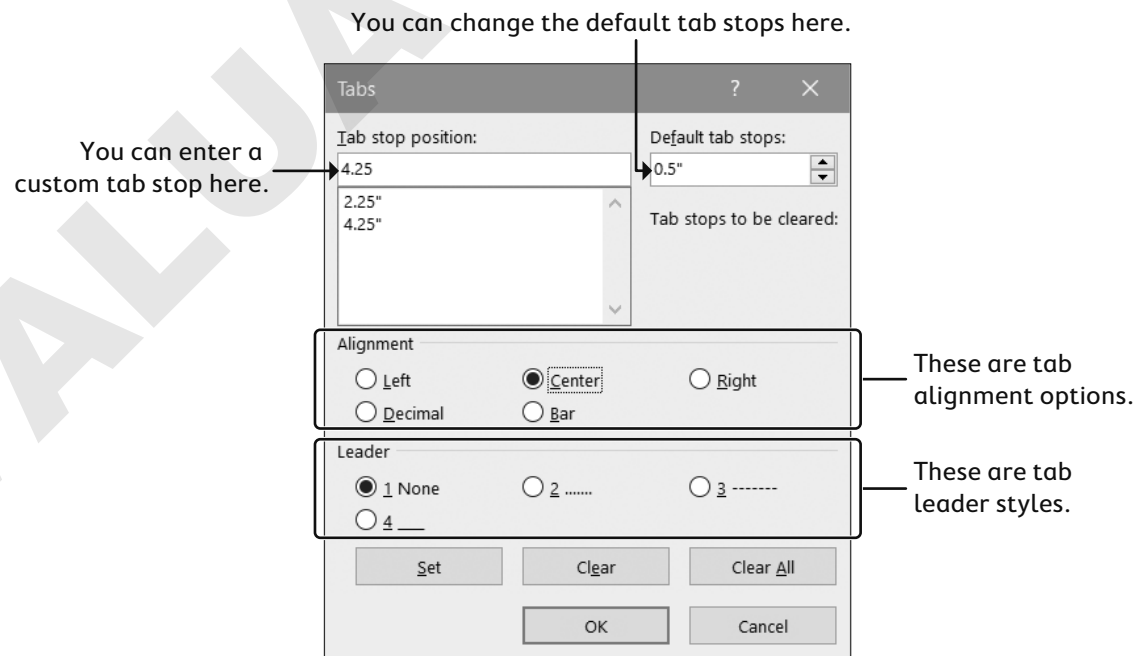
Using the Ruler to Set Custom Tabs

Word has four types of custom tab stops: left, right, center, and decimal. You can set all four types using the horizontal ruler. It is critical that you position the insertion point in the line where you plan to set tabs. Tab settings are carried inside the paragraph symbol to the next paragraph when you tap Enter.

Use the Tabs box to choose the tab type. (ToolTips describe the symbols.)

You indicate the tab placement by clicking in the desired location on the ruler.

SOCIAL MEDIA IN UNIVERSITIES

This heading is centered by a center tab.

You can delete a custom tab by dragging it off the ruler with your mouse. When you release the mouse button, the tab disappears.

Using the Tabs Dialog Box to Set Custom Tabs

You can also set custom tab stops in the Tabs dialog box. You can specify precise positions for tabs, choose the type of tab (alignment), clear custom tab stops, and set dot leader tabs. A leader tab generates a row of dots when you tap Tab. You often see dot leaders in a table of contents separating a topic from its page number.

You can change the default tab stops here.

You can enter a custom tab stop here.

These are tab alignment options.

These are tab leader styles.

≡ Home→Paragraph→dialog box launcher [⌐] →Tabs

DEVELOP YOUR SKILLS: W4-D2

In this exercise, you will set custom tabs and create two tabbed tables.

1. Save your report as **W4-D2-SocMediaRptRevised**.

2. If necessary, display formatting marks.

3. Position the insertion point on the blank line below the section titled *Rapid Increase in the Use of Social Media*.

4. Follow these steps to set tabs for the first table:
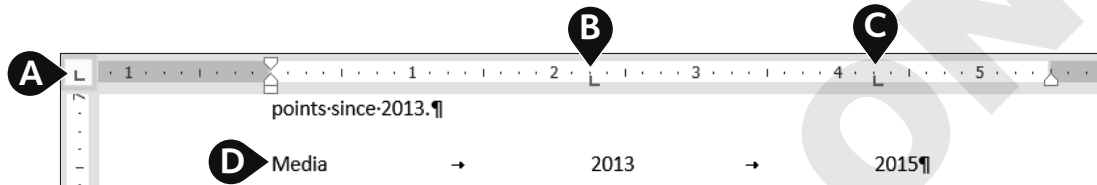
Ⓐ Verify that the Tabs box at the left of the ruler is set to a Left Tab. If not, click the box until it rotates around to Left Tab. (ToolTips describe the tab type.)

Ⓑ Click the ruler at the **2¼"** mark to set a tab.

Ⓒ Click the ruler at the **4¼"** mark for the second tab.

Ⓓ Type **Media** in the blank line and then type the next two entries, tapping ⌐Tab⌐ where you see the arrows and tapping ⌐Enter⌐ at the end of the line.

5. Type the rest of the table, tapping ⌐Tab⌐ and ⌐Enter⌐ where you see the arrows and paragraph symbols:

Media	→	2013	→	2015¶
Facebook	→	79%	→	84%¶
Twitter	→	35%	→	40%¶
Instagram	→	30%	→	36%¶
Snapchat	→	16%	→	23%¶

6. Select the first line of the table and choose **Home→Font→Bold** B .

7. Position the insertion point on the first blank line below the last paragraph of the document.

8. Follow these steps to set the tabs and type the table:

Media	→	Launched	→	2015·Users¶
Facebook	→	2004	→	1.5·billion·monthly·active·users¶
Twitter	→	2006	→	1.5·billion·monthly·active·users¶
Instagram	→	2010	→	300·million·active·users¶
LinkedIn	→	2003	→	380·million·users·worldwide¶

Ⓐ Set left tabs at the **2¼"** mark and the **3½"** mark.

Ⓑ Type the table as shown, applying **Bold** formatting to the first line of the table.

9. Save the file.

Formatting Text with Styles

A style is one of the most powerful formatting tools. It is a *group of formats* enabling you to apply multiple formats to a block of text all at once. Styles are based on the current template's theme, which is a set of colors, fonts, and graphic effects. There are styles for document elements, such as headings, titles, and special character formats, providing consistent formatting throughout a document.

Types of Styles

There are many built-in styles, and you are always working within a style. There are two basic types of styles: character and paragraph.

- Character styles: Character styles are applied to the word the insertion point is in or a selected group of words. Character styles contain only character formats, not paragraph formats. You can apply character styles *within* a paragraph that is formatted with a paragraph style.
- Paragraph styles: Paragraph styles are applied to all text in selected paragraphs or to the paragraph containing the insertion point. You can use any character or paragraph formats in a paragraph style. For example, you may want to format a heading with a large, bold font (character formatting) and apply paragraph spacing before and after the heading (paragraph formatting).
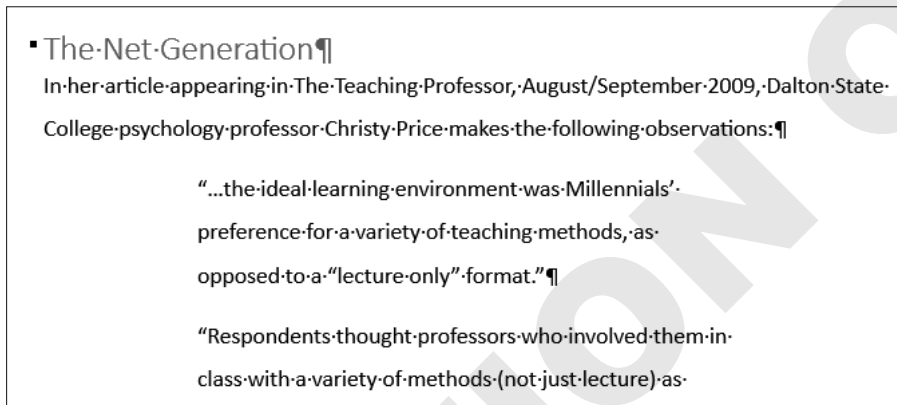
☰ Home→Styles→Styles Gallery │ Home→Styles→dialog box launcher ⬚

Collapsing Heading Topics

When you apply a heading style and the insertion point is in the heading, a small triangle marker appears at the left (whether formatting marks are displayed or not). You can click the marker to collapse and expand the text below it. In the following illustration, the text below *The Net Generation* is collapsed, allowing you to focus on certain parts of a document.

> ▷ ■ The·Net·Generation¶
>
>   ■ Rapid·Increase·in·the·Use·of·Social·Media¶
>   A·study·conducted·by·Harvard's·Institute·of·Politics·(iop.harvard.edu)·reports·use·of·

In this illustration, *The Net Generation* content is expanded.

> ■ The·Net·Generation¶
> In·her·article·appearing·in·The·Teaching·Professor,·August/September·2009,·Dalton·State·
> College·psychology·professor·Christy·Price·makes·the·following·observations:¶
>
> "…the·ideal·learning·environment·was·Millennials'·
> preference·for·a·variety·of·teaching·methods,·as·
> opposed·to·a·"lecture·only"·format."¶
>
> "Respondents·thought·professors·who·involved·them·in·
> class·with·a·variety·of·methods·(not·just·lecture)·as·

View the video "Using the Styles Gallery and the Styles Task Pane."

DEVELOP YOUR SKILLS: W4-D3

In this exercise, you will use Live Preview in the Styles gallery to find styles that will give your report a professional, polished look. You will apply the Title style to the report's main heading and the Heading 1 style to the headings within the report.

1. Save your file as **W4-D3-SocMediaRptRevised**.

2. Click anywhere in the report's main heading, *SOCIAL MEDIA IN UNIVERSITIES,* at the top of page 1.

3. Choose **Home→Styles** and then click the **More** button to open the Styles gallery.

> | AaBbCcDc | AaBbCcDc | AaBbC(|
> |----------|----------|--------|
> | ¶ Normal | ¶ No Spac... | Heading ʔ |
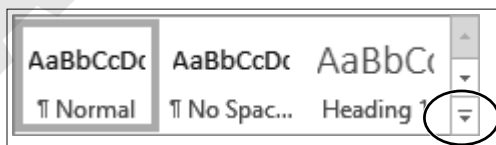
4. Hover the mouse pointer over the Title style to see its effect on the heading and then click to apply the style.

5. Click the **dialog box launcher** ⌐ in the bottom-right corner of the Styles group.

6. Position the insertion point in *The Net Generation* heading and then click the **Heading 1** style in the task pane to apply that style to the heading.

7. Use the same technique to apply the Heading 1 style to the remaining headings: *Rapid Increase in the Use of Social Media* and *University Recruiting Through Social Networking*.

8. Close the Styles task pane.

9. Scroll up and position the insertion point in *The Net Generation* heading to display the triangle marker to the left of the heading.

10. Click the **marker** to collapse the text below the heading.

11. Click the **marker** again to expand the text.

12. Save the report.

Inserting Headers/Footers and Comments

Headers and footers appear at the top and bottom of every page in a document, respectively, above and below the margins. You can place text, page numbers, dates, and other items in the header and footer areas. When you enter information in these areas, it is repeated on every page of the document. There is a variety of built-in header and footer formatting styles, or you can create your own.

The Comment feature is a great collaboration tool. It allows reviewers and originators to communicate about a document by posting comments to each other.
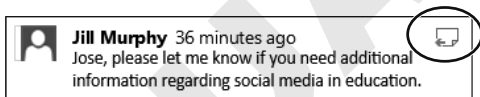
Clicking the reply button in the comments balloon allows threaded conversations between the originator and reviewers.

☰ Insert→Header & Footer→Header 🖹 *or* Footer 🖹 *or* Page Number 🖹

☰ Insert→Comments→Comment 🗨
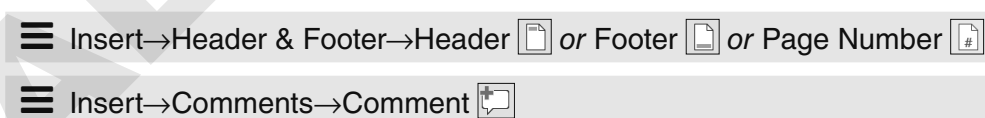
DEVELOP YOUR SKILLS: W4-D4

In this exercise, you will add headers and page numbers to the report using the built-in formats. Then you will add a comment to your report.

1. Save your file as **W4-D4-SocMediaRptRevised**.

2. Choose **Insert→Header & Footer→Header** 🗅 and choose the **Sideline** format from the gallery.

3. Click **Document Title** and type **My Virtual Campus** in its place.

4. Double-click in the document to close the header.

5. Choose **Insert→Header & Footer→Page Number** 🗅 and slide the mouse pointer down the menu to **Bottom of Page**.

6. Scroll down in the gallery and choose **Large Color 3**.

7. Double-click in the document to close the page number footer.

8. Double-click the footer area to open it and then double-click in the document again to close it.

9. Scroll through the report and observe the headers and page numbers.

10. Position the insertion point in front of *Instagram* in the first table and press ⎡Ctrl⎤+⎡Enter⎤ to insert a page break.

11. Scroll to the top of the document and select the word *Universities* (the anchor point for the comment) in the title.

12. Choose **Insert→Comments→Comment** 🗅 and type the following in the comment balloon on the right:

    Jose, please let me know if you need additional information regarding social media in education.

13. Save the report.

Customizing AutoCorrect

In addition to correcting errors, AutoCorrect lets you automatically insert customized text and special characters. It's also useful for replacing abbreviations with full phrases. For example, you could set up AutoCorrect to insert the name of your company whenever you type an abbreviation for it. And you can delete entries that come with Word that may interfere with your writing; however, this is not recommended when working on public or shared computers, as in improving your own productivity, you may inadvertently complicate that of others.

🚀 View the video "An Overview of the AutoCorrect Dialog Box."

🚀 View the video "AutoCorrect Exceptions."

≡ File→Options→Proofing→AutoCorrect Options button

DEVELOP YOUR SKILLS: W4-D5

In this exercise, you will create a custom AutoCorrect entry. You type the term social media *repeatedly in your work, so it's an ideal candidate for an AutoCorrect shortcut.*

1. Save your file as **W4-D5-SocMediaRptRevised**.

2. Choose **File→Options**, click the **Proofing** category in the left panel, and then click the **AutoCorrect Options** button to open the AutoCorrect dialog box.

3. Follow these steps to create an AutoCorrect shortcut:

Ⓐ Type **sm** in the Replace field.

Ⓑ Type **social media** in the With field.

Ⓒ Click **Add**.

4. Click **OK** twice.

5. In the second line of the first paragraph under the Rapid Increase in the Use of Social Media heading, delete *the Internet* and type **sm** ⎵Spacebar⎵, and correct any spacing if necessary.

6. In the first line of the first paragraph under the University Recruiting through Social Networking, delete *email*, type **sm** ⎵Spacebar⎵, and correct any spacing if necessary.

7. In the last line of the paragraph under the University Recruiting through Social Networking heading, position the insertion point in front of the word *platforms* and type **sm** ⎵Spacebar⎵.

8. Choose **File→Options**, click the **Proofing** category in the left panel, and then click the **AutoCorrect Options** button to open the AutoCorrect dialog box.

9. Type **sm** in the Replace field to scroll the list to that term.

10. Click **Delete** and then click **OK** twice.

11. Save and close the file.

Arranging Text in Multiple Columns

You can use newspaper-style columns (also known as newsletter-style columns) to arrange text in multiple columns. In newspaper layout, text flows down one column and wraps to the top of the next column, as in a newspaper or magazine. Newspaper columns can enhance readability because shorter lines are easier to read, as the eye doesn't have to travel far across the page before reading the next line, and they break up dense text with random gaps. Columns are automatically reformatted as you add or delete text during editing cycles.

You can quickly set your text in columns with the Columns button on the Ribbon, or you can open the Columns dialog box where you can set up more sophisticated column layouts. For example, you can insert a line between columns and specify the width of each column.

These are commonly used column styles.

You can check this option if you want a line between columns.

You can preview your column setup here.
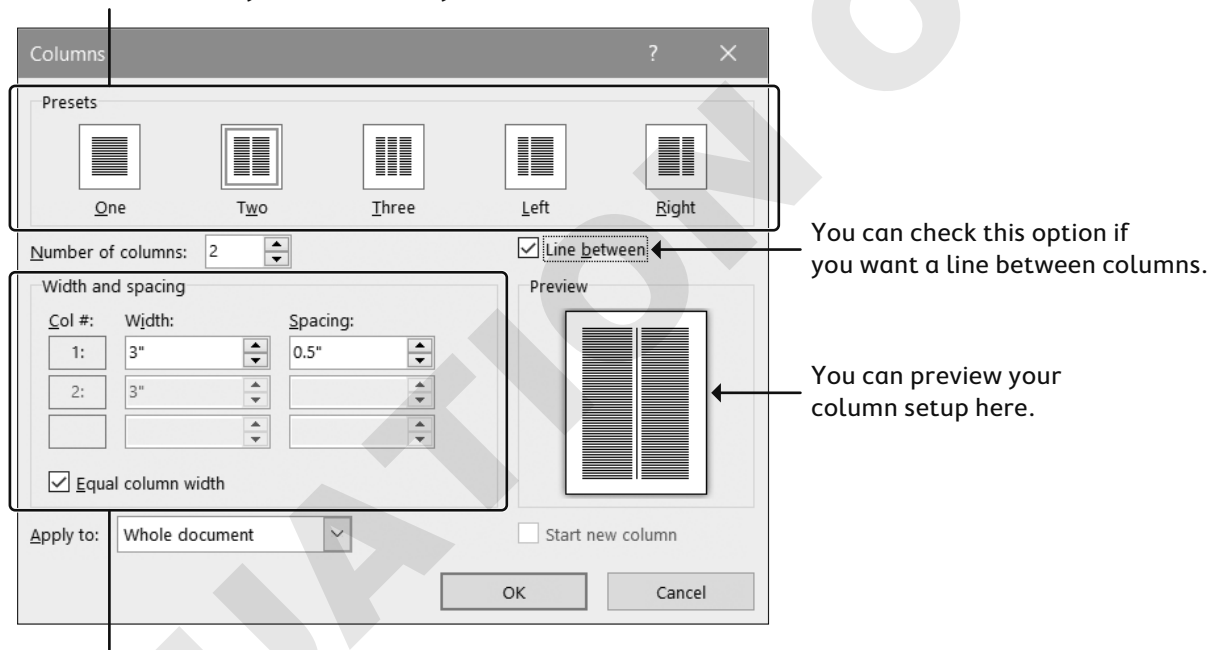
You can customize column widths and between-column spacing here.

≡ Layout→Page Setup→Columns 🔲

≡ Layout→Page Setup→Columns 🔲→More Columns

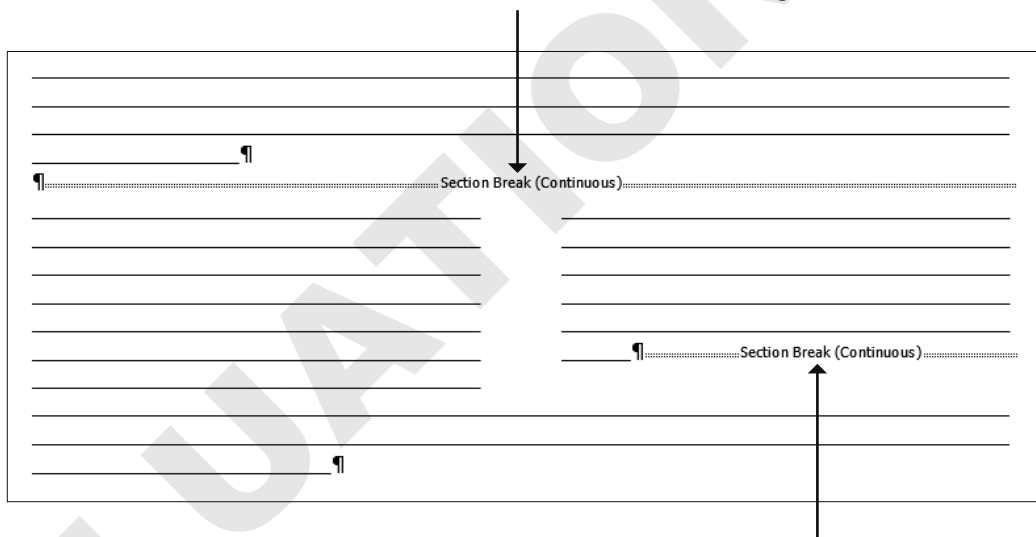## Column Breaks and Section Breaks

You can manually force a column to end by inserting a column break, thus moving the text at the break point to the top of the next column. This technique is often used to place headings at the top of columns and to balance columns on the last page of a multicolumn document.

Whenever you make a document-level formatting change that doesn't apply to the entire document, you need one or more section breaks to define the portion of the document affected by the change. For example, in a columnar magazine article, you may see a title line that extends across the page and then the body of the article is formatted in two columns. You need a section break to separate the one-column title from the two-column body of the article.

TYPES OF SECTION BREAKS	
Section Break	**Purpose**
Next Page	Inserts a section break and starts the new section on the next page
Continuous	Inserts a section break and starts the new section on the same page
Odd Page	Inserts a section break and starts the new section on the next odd-numbered page; a blank page may be inserted to force the odd page section break
Even Page	Inserts a section break and starts the new section on the next even-numbered page; a blank page may be inserted to force the even-page section break

The following illustration shows the use of continuous section breaks that are sectioning off the two-column portion of a document.

The section above this break has one-column formatting, and the section below it has two-column formatting.

This section break ends the two-column section.

≡ Layout→Page Setup→Breaks ⊟→Page Breaks→Column

≡ Layout→Page Setup→Breaks ⊟→Page Breaks and then choose a Section Break type
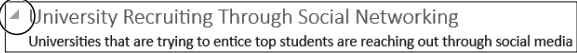
DEVELOP YOUR SKILLS: W4-D6

Because the article your marketing manager wants to distribute at the next staff meeting consists of dense text, he wants you to set the article in newspaper columns to enhance readability. In this exercise, you will insert a section break after the introduction, and then you will layout the second section of the document in two columns.

1. Open **W4-D6-SocMedForStaff** from your **Word Chapter 4** folder and save it as `W4-D6-SocMedForStaffRevised`.

2. If necessary, display formatting marks.

3. Position the insertion point in the second blank line following the first paragraph.

4. Choose **Layout→Page Setup→Breaks**⊟**→Continuous**.

5. Delete the blank line at the top of the second section.

6. Position the insertion point in the second section.

7. Choose **Layout→Page Setup→Columns**▦**→Two**.

8. Scroll to page 2, and you'll see that the columns are not well balanced.

9. Position the insertion point at the beginning of the last paragraph in the left column beginning with *In the real world*.

10. Choose **Layout→Page Setup→Breaks**⊟**→Column**.

11. Save and close the file.

Self-Assessment

Check your knowledge of this chapter's key concepts and skills by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. You can set custom indents by adjusting the indent markers on the horizontal ruler. | *True* *False*

2. The default margins are 1" on all 4 sides for a Blank Document template. | *True* *False*

3. Custom tab stops can simply be dragged off the ruler. | *True* *False*

4. When using a heading style, clicking the triangle collapses or expands the text below it. | *True* *False*

> ◢ University Recruiting Through Social Networking
> Universities that are trying to entice top students are reaching out through social media

5. Tab alignments for a custom tab can ONLY be set using the Tabs dialog box. | *True* *False*

6. The Feedback feature allows reviewers and originators to communicate about a document by posting comments. | *True* *False*

7. In a paragraph formatted with a paragraph style, you may still apply separate character styles. | *True* *False*

8. Tab settings are carried inside the paragraph symbol to the next paragraph when you tap ⌞Enter⌟. | *True* *False*

9. You can use AutoCorrect to insert customized text. | *True* *False*

10. Whether you add or delete text in a column, the columns are not reformatted. | *True* *False*

11. Which of the following is NOT a tab alignment option?
    - **A.** Center
    - **B.** Left
    - **C.** Hanging
    - **D.** Decimal

12. Which type of break should you use if you need a page to appear in landscape instead of portrait orientation?
    - **A.** Page break to start the new page
    - **B.** Next page section break
    - **C.** Landscape page break
    - **D.** Continuous section break

13. For which part of a document can margins be set?
    - **A.** Entire document
    - **B.** A specific section
    - **C.** Selected text
    - **D.** Any of the these options

14. Which of the following is NOT accurate regarding margins?
    - **A.** The default margins are 1.5" left and right and 1" top and bottom.
    - **B.** You can choose from a gallery of preset margins.
    - **C.** You can create custom margins.
    - **D.** Margins determine the amount of white space around the edges of the page.