

# FastCourse Microsoft® Word 2016 Level 2

**JILL MURPHY**  
Custom Performance Solutions



**LABYRINTH**  
LEARNING™

Berkeley, CA

*FastCourse Microsoft Word 2016: Level 2*

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**LABYRINTH**  
LEARNING™

Labyrinth Learning  
2560 9th Street, Suite 320  
Berkeley, California 94710  
800.522.9746  
On the web at [lablearning.com](http://lablearning.com)

**Product Manager:**  
Jason Favro

**Development Manager:**  
Laura Popelka

**Senior Editor:**  
Alexandra Mummery

**Junior Editor:**  
Alexandria Henderson

**Assessment and Multimedia  
Content Development:**  
Ben Linford, Judy Mardar, Andrew  
Vaughnley

**Production Manager:**  
Debra Grose

**Composer:**  
Happenstance Type-O-Rama

**Cover Design:**  
Mick Koller

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EVALUATION ONLY

**WORD 2016**

# Using Mail Merge

In this chapter, you will use the Mail Merge feature to turn boilerplate letters into personalized correspondence. The data source (list of variable information, such as the recipients' addresses) and the main document (form letter) only need to be set up and proofed once. Then you can generate hundreds of letters without checking each one. And you can use Mail Merge for more than letters. You can generate envelopes, labels, legal documents, or just about any fixed-text document that requires variable information. A data source can be a Word document, an Excel worksheet, an Access database, or an Outlook contact list.

## LEARNING OBJECTIVES

- Build data sources
- Create main documents
- Perform a mail merge
- Deal with merge problems
- Generate envelopes and labels

## CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs 30 mins
- Self-Assessment: 20 mins
- Total: 2 hrs 50 mins

## PROJECT: PROMOTING EXERCISE CLASSES

Raritan Clinic East is a pediatric medical practice. The practice serves patients ranging in ages from newborn to eighteen years. As the administrator who oversees the STAYFIT exercise classes at the clinic, once a week you receive the contact information for all new patients who would benefit from these classes. You will send a letter to the patients explaining the program. Once you set up the main document, you will be able to use it over and over for new patients. And once you design a flexible data source, you can use that same source layout for the exercise letters as well as other communications. Mail Merge is a real timesaver.

# Introducing Mail Merge

Mail Merge is most often used for generating personalized documents, such as Word letters, mailing labels, and envelopes. But Mail Merge is a versatile tool that can be used with any type of document that combines boilerplate text with variable information, such as email, standard contracts, and legal verbiage. Mail Merge can be a big time-saver and is valuable for managing large mailings.

## Components of Mail Merge

Merging creates a document that combines information from two files. They are known as the main document and the data source.

- **Main document:** This document controls the merge. It is a Word document that contains the fixed information and merge codes into which the variable information is merged. A typical form letter, for instance, has a different inside address and greeting line in each letter, while the rest of the text is the same for everyone receiving the letter.
- **Data source:** The data source can be another Word document, a spreadsheet, a database file, or contact list in Outlook. The data source contains field names that correspond with the merge codes in the main document.
- **Merged document:** This document is the result of the merge. It contains all of the letters addressed to each individual in your data source.

You can merge an existing main document with an existing data source, or you can create the main document and data source while stepping through the merge process.

Last Name	First Name	Title	Address Line 1	City	State	ZIP Code
Adams	Andre	Mr.	2224 Culver Drive	San Diego	CA	92102
Bouras	Talos	Mr.	854 Whitmore Drive	San Diego	CA	92101
Chowdrey	Michael	Mr.	146 Meadow Lane	La Jolla	CA	92103
Navarro	Derek	Mr.	3300 Maple Drive	La Jolla	CA	92103
Romero	Nicole	Ms.	132 Lake Street	San Diego	CA	92102
Wright	Mary	Ms.	1240 Potrero Avenue	San Diego	CA	92101

«AddressBlock»

«GreetingLine»

«First\_Name», welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine. As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program. Being active helps you be healthier and stronger—and feel your best. And «Your\_Doctor» wants the best for you!

In designing your fitness program, choose from the following offerings:

Aerobic Exercise	Flexibility Training	Strength Training
Dance and Movement	Qi Gong	Calisthenics
Water Aerobics	Tai Chi	Free Weights
Zumba	Yoga	Pilates

Having trouble finding the right exercise program for you? Contact a health coach. Call 1-800-555-0101.


Classes are every evening from 7:00–8:00 p.m. Advanced registration is required. Call 1-800-555-0102.

Sincerely,

Molly Lincoln  
STAYFIT Coordinator

The data source can be a Mail Merge recipient list, a Word table, an Excel spreadsheet, or an Access database.

The main document contains standard text and merge codes where variables from the data source will be merged.



**Raritan  
Clinic  
East**  
Pediatric Diagnostic Specialists  
719 Coronado Drive  
San Diego, CA 92102

February 10, 2016

Mr. Andre Adams  
2224 Culver Drive  
San Diego, CA 92102

Dear Andre:

Andre, welcome to Raritan Clinic East, one of the finest clinics in the field of pediatric medicine. As part of our ongoing effort to provide the best patient care, we offer an extensive STAYFIT program. Being active helps you be healthier and stronger—and feel your best. And Dr. Bey wants the best for you!

In designing your fitness program, choose from the following offerings:

Aerobic Exercise	Flexibility Training	Strength Training
Dance and Movement	Qi Gong	Calisthenics
Water Aerobics	Tai Chi	Free Weights
Zumba	Yoga	Pilates

Having trouble finding the right exercise program for you? Contact a health coach. Call 1-800-555-0101.

Classes are every evening from 7:00–8:00 p.m. Advanced registration is required. Call 1-800-555-0102.

Sincerely,

Molly Lincoln  
STAYFIT Coordinator

Here is a completed merge document with the variables from the data source.

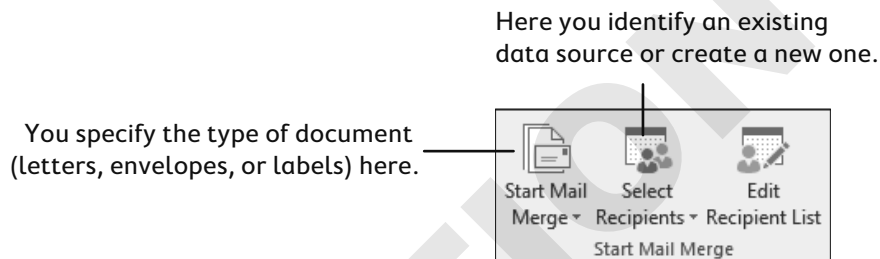
## The Benefits of Mail Merge

Mail Merge saves a lot of time. Imagine you want to send a letter to 100 customers. Without Mail Merge, you would have to type the same text in all 100 letters (or copy and paste 100 times). However, with Mail Merge, you create one main document with the standard text and one data source containing customer names and addresses.

You will also really appreciate Mail Merge when you later decide you want to make a change. Using Mail Merge, you can edit the main document once and remerge it with the data source to produce a new merged document. Without Mail Merge, you would need to edit each letter individually.

## The Mailings Tab

The Mailings tab provides guidance in setting up the main document and data source, and it helps you conduct the merge. The Start Mail Merge group is the beginning point. Alternatively, you can use the Step-by-Step Mail Merge Wizard from the Start Mail Merge menu to walk you through the process.



## Working with the Data Source

Data sources typically contain names, addresses, telephone numbers, and other contact information. However, you can include any information in a data source. For example, you could include part numbers and prices to create a parts catalog. You can create a data source in Word, or you can use an external data source, such as an Access database or Excel spreadsheet. Once a data source is created, it can be merged with many different main documents.



View the video “Designing and Creating a Data Source.”

### DEVELOP YOUR SKILLS: W1-D1

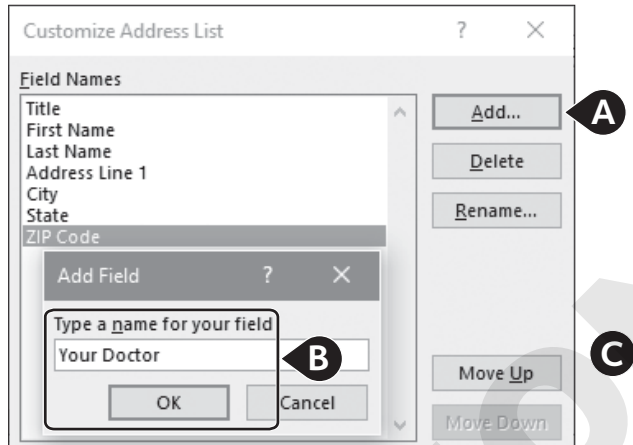
*In this exercise, you will use the Start Mail Merge group on the Ribbon to specify a letter as your main document. Then you will customize the data source columns and enter data.*

*Before You Begin: Be sure to visit the Learning Resource Center at [labyrinthelab.com/lrc](http://labyrinthelab.com/lrc) to retrieve the exercise files for this course before beginning this exercise.*

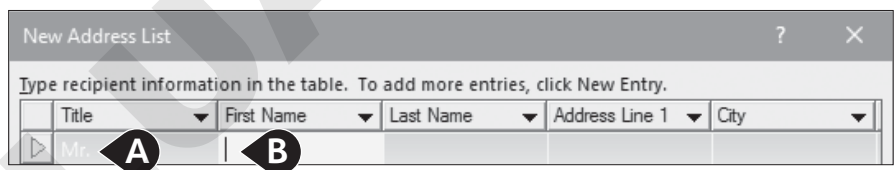
1. Open **W1-D1-ExerciseLtr** from your **Word Chapter 1** folder and save it as **W1-D1-ExerciseLtrRevised**.



2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Letters**.
3. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Type a New List**.
4. Click **Customize Columns** to open the Customize Address List dialog box.
5. Choose **Company Name** and click **Delete**; click **Yes** to verify the deletion.
6. Delete **Address Line 2, Country or Region, Home Phone, Work Phone, and E-mail Address**.
7. Follow these steps to add a field:



- A Click **Add**.
  - B Type **Your Doctor** and click **OK**.
  - C Click **OK** to close the Customize Address List dialog box.
8. Follow these steps to begin the first record:



- A Type **Mr .** in the Title field, but *do not* type a space after the period. Word will add spaces as needed.
  - B Tap **Tab** to move to the next field.
9. Type **Talos** and tap **Tab** to move to the next field.
  10. Finish entering the Talos Bouras data shown, tapping **Tab** between fields. The list of fields will scroll as you **Tab** and type.

Mr. Talos Bouras 854 Whitmore Drive San Diego CA 92101 Dr. Gonzalez	Ms. Nicole Romero 132 Lake Street San Diego CA 92102 Dr. Mansee	Mr. Michael Chowdrey 900 C Street La Jolla CA 92103 Dr. Kelly
--	--	--

11. When you complete the first record, click **New Entry** or tap **Tab** to generate a new row for the next record; then enter the two remaining records shown.
12. Leave the New Address List dialog box open.

## Reviewing Your Records

It's a good idea to review your records for accuracy before saving the data source. However, if you miss an error, you can always edit it later.

	Title	First Name	Last Name	Address Line 1	City
▶	Mr.	Talos	Bouras	854 Whitmore	San Diego

If an entry is wider than the field, position the mouse pointer between column headers and drag to widen (or use the arrow keys to scroll through the entry).

## DEVELOP YOUR SKILLS: W1-D2

In this exercise, you will examine your records for accuracy and save your data source.

1. Position the mouse pointer on the scroll bar at the bottom of the dialog box and drag right and left to view all the fields.
2. Follow these steps to review your records:

	Title	First Name	Last Name	Address Lin...	City
▶	Mr.	Talos	Bouras	854 Whitmore D	San Diego
	Ms.	Nicole	Romero	132 Lake Street	San Diego
	Mr.	Michael	Chowdrey	900 C Street	La Jolla

- A Position the insertion point here and use the arrow keys to move through the entry.
  - B Position the mouse pointer here and drag to the right to display the entire entry.
3. Review your entry and correct any typos and then click **OK** to open the Save Address List dialog box.
4. Save the data source file as **W1-D2-ExerciseLtrData.mdb** in your **Word Chapter 1** folder.

## Managing the Address List



The Mail Merge Recipients dialog box lets you sort and filter address lists, choose records to include in the mail merge, and edit the data source. If you used a Word table, Excel spreadsheet, or other file for your data source, you can edit directly in that data source file.

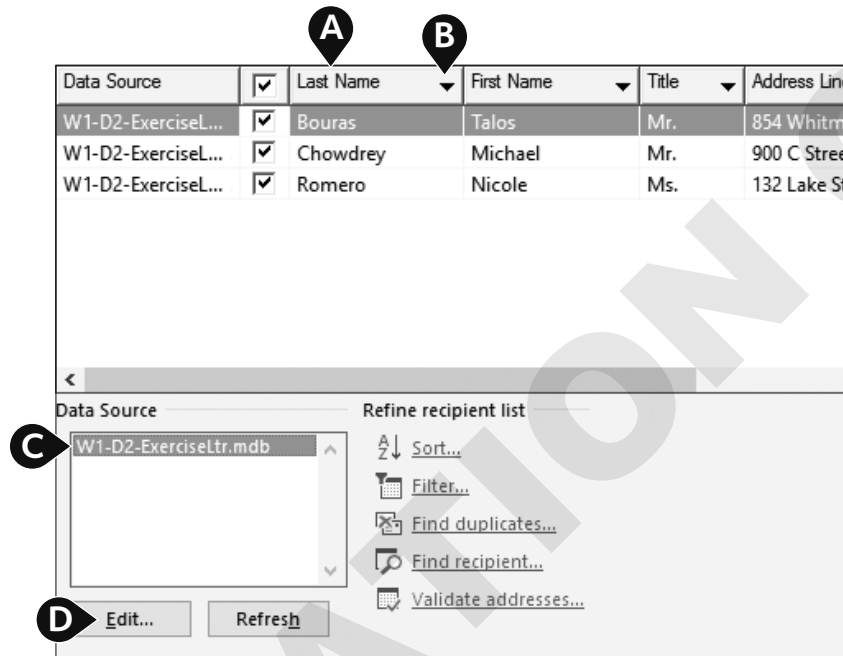


View the video “Working with the Address List.”

## DEVELOP YOUR SKILLS: W1-D3

In this exercise, you will work with the Mail Merge Recipients dialog box, where you can sort, filter, and edit your mailing list.

1. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
2. Navigate to your **Word Chapter 1** folder and double-click **W1-D2-ExerciseLtrData**.
3. Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List** .
4. Follow these steps to sort and filter the list and open the Edit Source dialog box:



- A Click this field header to sort the list in ascending order by Last Name.
- B Click the drop-down arrow and choose **Chowdrey** to filter out other entries. Click the arrow again and choose **(All)** to redisplay all records.
- C Click the data source to activate the Edit button.
- D Click **Edit** to open the Edit Data Source dialog box.

5. Follow these steps to edit a record:

**Edit Data Source** ? X

To edit items in your data source, type your changes in the table below. Column headings display fields from your data source and any recipient list fields to which they have been matched (in parentheses).

Data source being edited: W1-D2-ExerciseLtrData.mdb

	Title ▼	First Name ▼	Last Name ▼	Address Line 1 ▼	City ▼
	Mr.	Talos	Bouras	854 Whitmore ...	San Diego
	Ms.	Nicole	Romero	132 Lake Street	San Diego
▶	Mr.	Michael	Chowdrey	900 C Street	La Jolla

- A** Click this address to select it.
- B** Type **146 Meadow Lane** in its place.
6. Follow these guidelines to enter the three records in the following illustration:
- Click the **New Entry** button or tap **Tab** at the end of the row for each new record.
  - Tap **Tab** to move from one field to the next.
  - If you accidentally tap **Tab** after the last record, use **Delete Entry** to remove the blank record.

Ms. Mary Wright 1240 Potrero Avenue San Diego CA 92101 Dr. Gonzalez	Mr. Derek Navarro 3300 Maple Drive La Jolla CA 92103 Dr. Storm	Mr. Andre Adams 2224 Culver Drive San Diego CA 92102 Dr. Bey
--	---	---

7. Review the entries for accuracy and then click **OK** to close the dialog box.
8. Click **Yes** when the message appears verifying your update.
9. Click **OK** to close the Mail Merge Recipients dialog box.




## Working with the Main Document

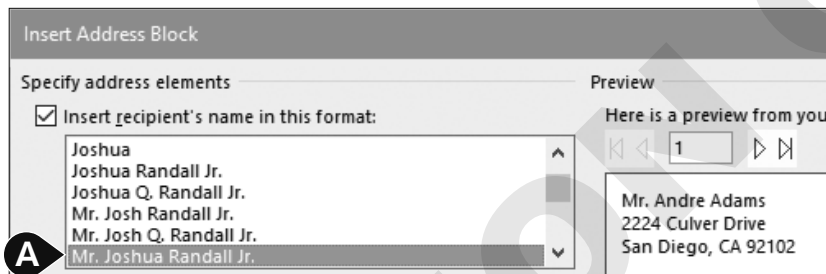
You accomplish a merge by combining a main document with a data source. Merge fields in a main document correspond to fields in the data source. Some merge codes, such as the Address Block code, are composite codes consisting of a number of grouped fields. For example, the Address Block code includes Title, First Name, Last Name, Address, City, State, and Zip.


View the video “Inserting Merge Fields in the Main Document.”

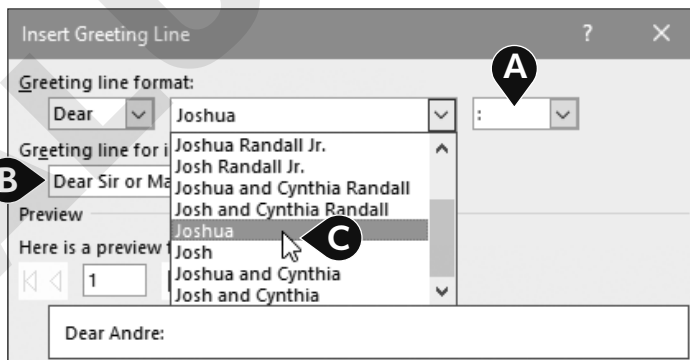
## DEVELOP YOUR SKILLS: W1-D4

In this exercise, you will set up a form letter. The exercise letter main document should still be open.

1. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  to display formatting characters.
2. Select the **Today's Date** line and tap **Delete**.
3. Choose **Insert**→**Text**→**Date & Time** .
4. Choose the third date format, check **Update Automatically**, and click **OK**.
5. Tap **Enter** four times after inserting the date.
6. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
7. Follow these steps to insert an Address Block code:

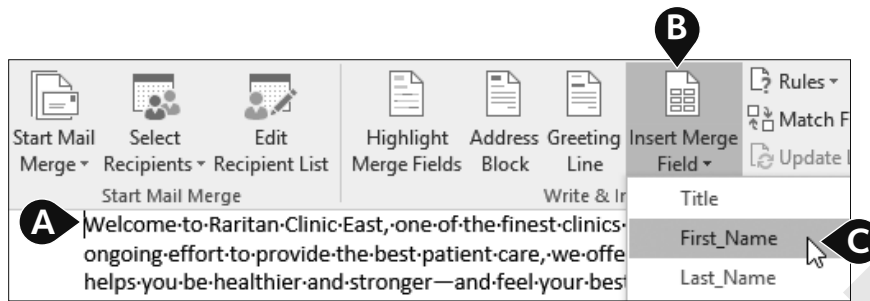


8. Tap **Enter** twice.
9. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line** .
10. Follow these steps to modify and insert the Greeting Line code:

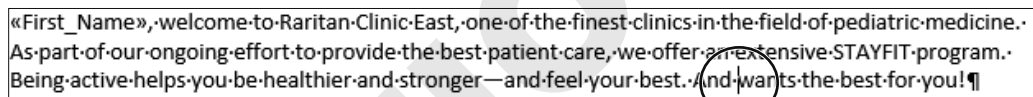



11. Change this option to a **colon (:)**.
12. Note the generic greeting that will be used for data records if they are missing last names.
13. Choose **Joshua** from the list and then click **OK**.

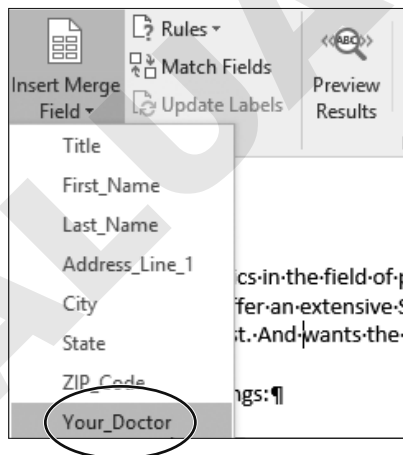
11. Tap **Enter** twice.
12. Follow these steps to insert the First Name code into the letter:



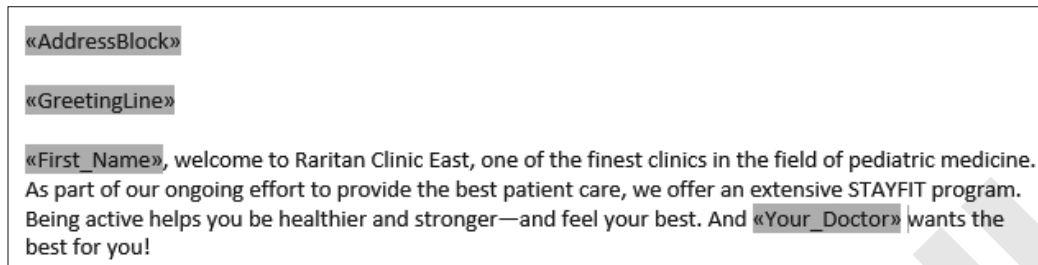
- A If necessary, position the insertion point to the left of *Welcome*.
  - B Click the **Insert Merge Field** menu button ▼.
  - C Choose **First Name**.
13. Type a comma and tap **Spacebar**, then delete the uppercase *W* and replace it with a lowercase *w*.
  14. Position the insertion point to the left of *wants* as shown.



15. Choose **Mailings**→**Write & Insert Fields**→**Insert Merge Field**  menu button ▼, choose **Your Doctor**, and then tap **Spacebar**.



16. Take time to review your letter, making sure the merge fields match this example. In particular, make sure you use the proper punctuation between fields and the text.



17. Choose **Home**→**Paragraph**→**Show/Hide ¶** to turn off formatting marks.  
 18. Save your file.

## Conducting a Merge

Merging combines a main document with a data source document. If you are merging a form letter with a data source, Word produces a personalized copy of the form letter for each record in the data source.

It’s always a good idea to preview the merge results before you complete the merge so you can make any corrections. If you notice an error that needs to be fixed in the main document, simply click Preview Results again to return to the main document.

Use this button to display the first record from your data source in the letter.

Navigate through the letters with these buttons.

You can click here to have Word check for errors, such as an invalid field code.

When you feel confident that your letter and data source are accurate, you are ready to complete the merge.

This option merges letters on the screen so you can edit individual letters, if desired.

This choice merges directly to the printer.

You can also merge to email messages.

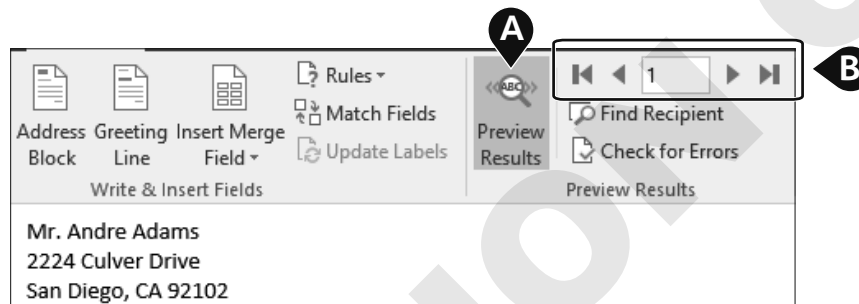
## To Save or Not to Save?

Merged documents are rarely saved because they can easily be reconstructed by merging the main document with the data source. Instead, merged documents are usually previewed, printed, and closed without saving. But you can certainly save the merged document if you wish to have a record of it. If a merged document contains errors, you can close it without saving, edit the main document or data source, and conduct the merge again.

### DEVELOP YOUR SKILLS: W1-D5

In this exercise, you will use the *Preview Results* command to review your letters then you will complete the merge on the screen.

1. If necessary, switch to the **Mailings** tab.
2. Follow these steps to preview the merge:



- A Click **Preview Results** to display the first inside address.
  - B Use the navigation buttons to scroll through all of your merged documents.
3. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
4. Click **OK** to merge all records.
5. Scroll through the letters and scan their contents.
6. Close the merged document without saving.
7. Choose **Mailings**→**Preview Results**→**Preview Results** again to display the main document instead of the previews.

## Working with Merge Problems

Several common errors can cause a merge to produce incorrect results. The merged document (or preview) will usually provide clues as to why a merge fails to produce the intended results. Once you identify an error in the merged document, such as leaving out a comma or space





before or after a merge field, you can then conduct the merge again to determine if the error was fixed. Repeat this process until the merge works as intended.

COMMON MERGE PROBLEMS	
Problem	Solution
The same error appears in every merge letter.	The problem is in the main document. Correct the error and perform the merge again.
Some letters are missing data.	Some records in the data source are missing data. Add data and perform the merge again.
Some letters have incorrect data.	Some records in the data source are incorrect. Correct the errors and perform the merge again.

## DEVELOP YOUR SKILLS: W1-D6

*In this exercise, you will examine your document for merge problems. This exercise does not address all possible merge problems; it does, however, address one specific error that you will make intentionally. You will insert a colon after the Greeting Line code.*

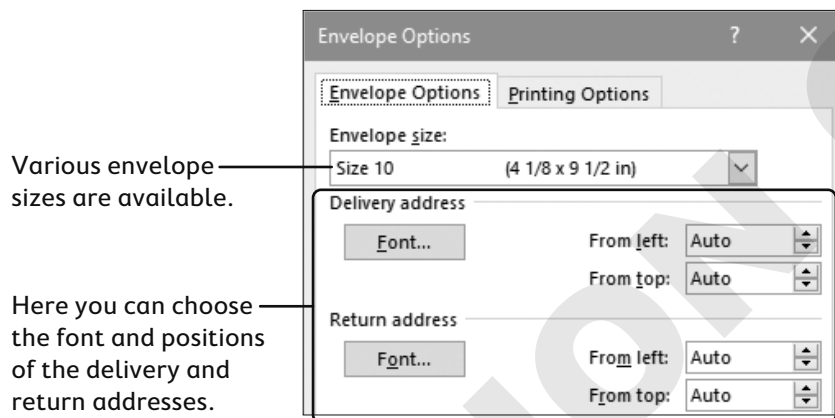
1. Position the insertion point after <<GreetingLine>> and type a colon.
2. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
3. Click **OK** to merge all records.
4. Browse through the merged document and notice there are two colons following the greeting line in every letter.
5. Locate any other errors and notice how often the errors occur (in every merged letter or just one).
6. Close the merged document without saving; then remove the colon following <<GreetingLine>> and save the main document.
7. Follow these guidelines if you find a data error in just one letter.
  - Choose **Mailings**→**Start Mail Merge**→**Edit Recipient List** .
  - In the Mail Merge Recipients dialog box, highlight the data source in the bottom-left corner and click **Edit**.
  - Fix any errors and click **OK**; click **Yes** to update the data.
  - Click **OK** to close the dialog box.
8. When you have corrected any errors, execute the merge again.
9. Close the merged document without saving it and then save and close the exercise letter main document.

# Merging Envelopes and Labels

When you begin a mail merge, you are presented with options for the type of main document you can create. In addition to form letters, you can choose envelopes, labels, and other types of documents. You can use the same data source for various main documents. For example, you can use the same data source for envelopes and mailing labels that you used for the form letter.

## Generating Envelopes with Mail Merge

Mail Merge lets you choose the envelope size and formats. The standard business (Size 10) envelope is the default. Check your printer manual for instructions on loading envelopes.



### DEVELOP YOUR SKILLS: W1-D7

*In this exercise, you will choose an envelope as the main document and connect the exercise letter data file to the envelope.*

1. Start a new, blank document.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Envelopes**.
3. In the Envelope Options dialog box, if necessary, choose **Size 10** as the envelope size and click **OK**.
4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
5. In the Select Data Source dialog box, navigate to your **Word Chapter 1** folder and open **W1-D2-ExerciseLtrData**.

### Arranging the Envelope

You can insert an Address Block code in the envelope main document just as you do for form letter main documents. If you are not using envelopes with preprinted return addresses, you can type your return address. You save an envelope main document like any other main document.

## DEVELOP YOUR SKILLS: W1-D8

*In this exercise, you will place the return address and the Address Block code on the envelope. Then you will merge the envelope main document with the data source.*

1. If necessary, display formatting marks.
2. Type this return address, starting at the first paragraph symbol in the upper-left corner of the envelope:  

**Raritan Clinic East**  
**719 Coronado Drive**  
**San Diego, CA 92102**
3. Position the insertion point next to the paragraph symbol toward the center of the envelope.
4. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
5. Click **OK** to accept the default address block settings.
6. Choose **Mailings**→**Preview Results**→**Preview Results**  to display a record from the data source in the envelope.
7. Use the navigation buttons in the Preview Results group to scroll through all of your merged envelopes.
8. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents** and click **OK** to merge all records.
9. Turn off formatting marks and then scroll through the envelopes and notice that there is one envelope for each record in the data source.
10. If necessary, fix any problems with the mail merge and merge the envelopes again.
11. Close the merged document without saving it.
12. Choose **Mailings**→**Preview Results**→**Preview Results**  to turn off the preview.
13. Save the main document envelope as **W1-D8-ExerciseLtrEnv** in your **Word Chapter 1** folder and then close it.

## Generating Labels with Mail Merge

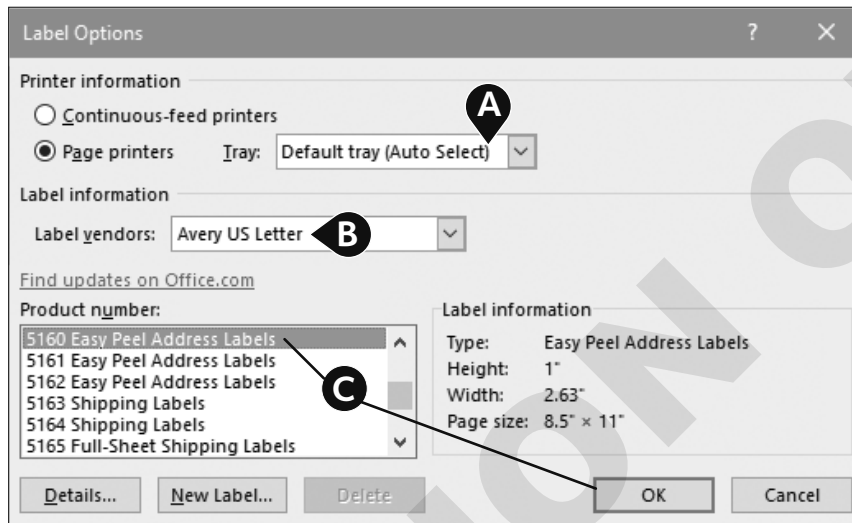
You can use Mail Merge to generate mailing labels for each record in a data source. Mail Merge lets you choose the label format, sheet size, and other specifications. It also lets you insert an Address Block code and other codes in the main document. Like other main documents, a label main document can be saved for future use.




 View the video “Using Label Options.”



## DEVELOP YOUR SKILLS: W1-D9

In this exercise, you will set up a labels main document and merge it with the data source used in the previous exercises.

1. Start a new, blank document and, if necessary, display formatting marks.
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Labels**.
3. Follow these steps to choose a printer option and a label:



- A Choose **Default Tray**. The text in parentheses may vary based on the printer model.
  - B Choose **Avery US Letter**.
  - C Choose **5160 Easy Peel Address Labels** and click **OK**.
4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** →**Use an Existing List**.
5. In the Select Data Source dialog box, navigate to your **Word Chapter 1** folder and open **W1-D2-ExerciseLtrData**.
6. Make sure the insertion point is next to the paragraph symbol in the first address label.
7. Choose **Mailings**→**Write & Insert Fields**→**Address Block**  and click **OK**.
8. Choose **Mailings**→**Write & Insert Fields**→**Update Labels**  to place the Address Block code in all labels.
9. Select the table and choose **Layout**→**Paragraph**; then type **0** in the **Before** field and tap **Enter**.

10. Choose **Mailings**→**Preview Results**→**Preview Results**  to see how the labels will look when you print them.
  11. Turn off Preview Results when you are finished.
  12. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
  13. Click **OK** to merge all the records.
  14. Close your merged document without saving it.
  15. Save the labels main document in your **Word Chapter 1** folder as **W1-D9-MergeLabels**.
  16. Close the document and then exit Word.
- 

EVALUATION ONLY

# 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. Once a data source is attached to a document, it cannot be used with other documents. True False
2. You cannot merge a portion of a field into a main document. True False
3. You should not type spaces in data fields. Spaces are added automatically as needed. True False
4. A mistake in one merged letter indicates an error in the main document. True False
5. You can use the Mail Merge Recipients dialog box to sort and filter address lists. True False
6. Combining the first and last name in the same field limits the flexibility of your data source. True False
7. The data source controls the merge. True False
8. The merge document is usually saved. True False
9. Some merge codes are composite codes consisting of a number of grouped fields. True False
10. You can use the Address Block code in a form letter but not in labels. True False
11. Which of the following tasks can you NOT accomplish in the New Address List dialog box?
  - A. Enter a new record
  - B. Customize columns
  - C. Delete an entry
  - D. Execute a merge
12. To qualify as a main document, a letter must:
  - A. use a sorted data source
  - B. include merge codes
  - C. use Word 2016's line and paragraph spacing
  - D. contain records
13. Which of the following can you use as a mail merge main document?
  - A. An Excel workbook
  - B. A Word letter
  - C. An Access database
  - D. All of these options
14. Which of the following is accurate regarding mail merge labels?
  - A. You must have a page of labels in the printer before executing the merge.
  - B. You cannot insert merge fields in a labels document.
  - C. You cannot save a labels main document for future use.
  - D. You can use the same data source you used to create a form letter.

WORD 2016

# Creating a Newsletter

**A** newsletter should be an essential part of every organization's communication plan. It's a great way to rally support for new programs or products and to maintain an ongoing relationship with your clients. In this chapter, you will create engaging newsletters using graphics and special text effects to add eye appeal. Finally, you will add a cover page to give a professional touch to your newsletter.

## LEARNING OBJECTIVES

- Add graphic effects
- Use section breaks and columns
- Wrap text around a graphic image
- Insert a cover page
- Print part of a full document

## CHAPTER TIMING

- Concepts/Develop Your Skills: 1 hr 30 min
- Self-Assessment: 20 mins
- Total: 1 hr 50 mins

## PROJECT: CREATING A CLIENT NEWSLETTER

As a leading pediatric facility, Raritan Clinic East stays ahead of the curve by updating its protocols with the latest discoveries. It stays in regular contact with its patient population through a monthly newsletter. As an administrator for the clinic, you have been asked to publish this month's newsletter, which describes meningitis, its symptoms, where outbreaks are likely to occur, and its treatment. You will add interest to your newsletter by using graphics and special text formatting.

## Six Tips for an Effective Newsletter

A newsletter is an effective way to keep in touch with clients. It adds a personal touch that can create a bond between your organization and the reader.

- Know your audience.
- Have a compelling opening line.
- Use a clean, simple layout with plenty of white space.
- Be informative and educational and provide true value.
- Use graphics but don't overdo it.
- Insert headings and subheadings to chunk your information into easy-to-read segments.

## Adding Special Effects to Text

To add interest and dimension to newsletters, you can use graphic effects. For example, you can add WordArt for flair. You can create WordArt by adding your own text to a WordArt object, or you can apply a WordArt object to existing text. Either way, you have a full array of WordArt formatting tools available on the contextual Drawing Tools Format tab.

Font effects are interesting, special treatments of text. Options include strikethrough, superscript/subscript, small caps, and all caps.



☰ Insert→Text→WordArt 

☰ Home→Font→dialog box launcher 

### DEVELOP YOUR SKILLS: W2-D1

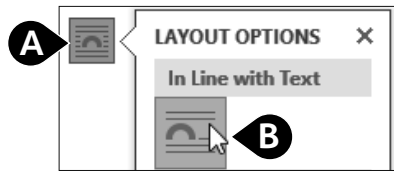
*In this exercise, you will begin creating the newsletter for Raritan Clinic East. You will start with a WordArt heading, which you will format with a new fill color, font color, and text effects. Then you will use the Font dialog box to adjust the font style and size, and then you will add font effects.*

1. Start Word; open a new, blank document; and save it to your **Word Chapter 2** folder as **W2-D1-RaritanNewsltr**.
2. Display formatting marks and then type these heading lines at the top of the document:
 

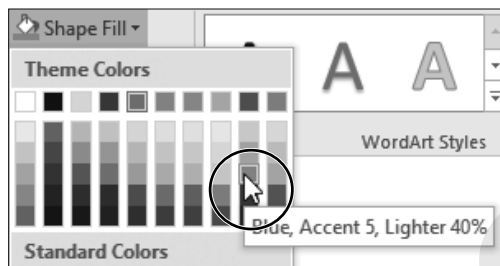
**Raritan Clinic East**  
**The Children's Clinic**  
**November, 2016**
3. Tap  three times.
4. Select *Raritan Clinic East* but do not select the paragraph mark at the end of the line.
5. Choose **Insert**→**Text**→**WordArt**  and then choose **Fill – Blue, Accent 1, Shadow**.



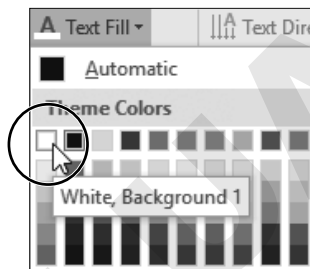
6. With the WordArt object selected, follow these steps to place it in line with the text:



- A** Click the **Layout Options** smart tag.
- B** Choose **In Line with Text** and then click in the document to close the gallery.
7. Click the border of the WordArt to select the entire object.
8. Choose **Drawing Tools**→**Format**→**Shape Styles**→**Shape Fill menu button** ▼ and then choose **Blue, Accent 5, Lighter 40%** from the gallery.

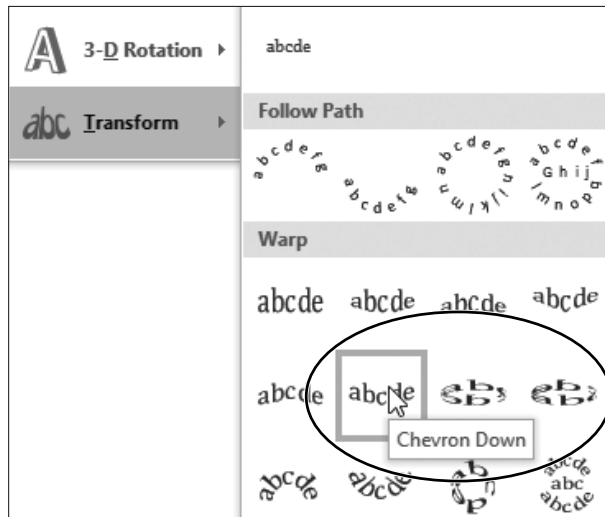




9. Choose **Drawing Tools**→**Format**→**WordArt Styles**→**Text Fill menu button** ▼ and then choose **White, Background 1**.

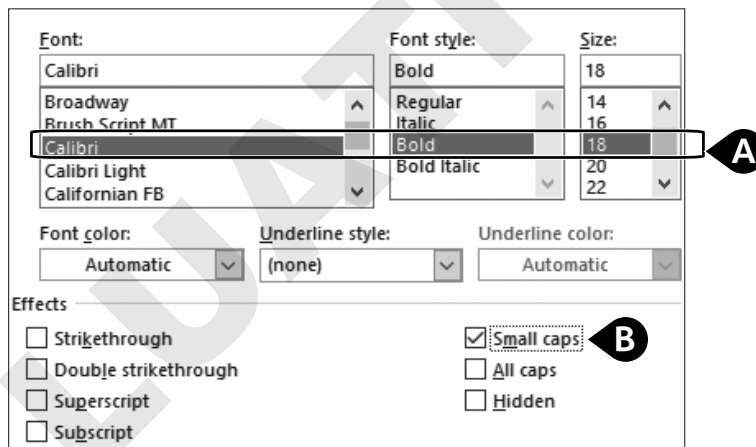


10. With the object selected, choose **Drawing Tools**→**Format**→**WordArt Styles**→**Text Effects** **A**.

11. Drag the mouse pointer down to the Transform category and then choose **Chevron Down**.



12. Position the mouse pointer in the left margin area next to the WordArt object and then click and drag down to select the WordArt and the other two headings.
13. Choose **Home**→**Paragraph**→**Center** .
14. Select *The Children's Clinic* and then choose **Home**→**Font**→**dialog box launcher**  to display the Font dialog box.




- A** Choose **Calibri, Bold, 18 pt**.
- B** In the Effects area, check **Small Caps**.
- C** Click **OK**.

15. Save the file.

# Inserting a Picture and Using Picture Effects





Including pictures in your documents can make them rich and colorful and enhance your message. In addition to accessing pictures online, you can also insert pictures directly from files. For example, you can insert a scanned picture or a picture taken with a digital camera and stored on your computer. And Word has great picture effects that you can add to your images, such as shadows, reflections, glows, soft edges, bevels, and 3-D rotations.

☰ Insert→Illustrations→Pictures 

☰ Picture Tools→Format→Picture Styles→Picture Effects 

## DEVELOP YOUR SKILLS: W2-D2

*In this exercise, you will insert and crop a graphic image. Then you will add a picture effect to the image.*

1. Save your file as **W2-D2-RaritanNews1tr**.
  2. Position the insertion point on the blank line below the date.
  3. Choose **Insert**→**Illustrations**→**Pictures** .
  4. Navigate to your **Word Chapter 2** folder and double-click the **W2-D2-RaritanClinic.png** graphics file to insert it.
  5. With the picture selected, choose **Picture Tools**→**Format**→**Size**→**Crop** .
  6. Position the mouse pointer on the right-center cropping handle and drag left to crop off the words *Raritan Clinic East*.
  7. Position the mouse pointer on the bottom-center cropping handle and drag up to remove the words at the bottom of the image, and then click in the document to finish cropping.
  8. If necessary, choose **View**→**Show**→**Ruler** and then resize the image from a corner sizing handle, making it approximately **1½" wide**.
  9. With the image selected, choose **Picture Tools**→**Format**→**Picture Styles**→**Picture Effects** .
  10. Drag the mouse pointer to the **Shadow** category, and in the Outer category choose **Offset Diagonal Bottom Right**.
  11. Choose **Home**→**Paragraph**→**Center** .
  12. Save the file.
-

# Inserting a Section Break and Setting Up Columns

Whenever you have a page-oriented formatting change that affects only part of a document, such as margins, page orientation, or columns, you need to set off that part with a section break. You use a Continuous break to start a new section within a page. You use a Next Page section break to start a new section on a new page, or, if your document is laid out in a book-like format, you can specify that the section break should start on an Even Page or Odd Page.





When you set a document or a section of a document in columns, you can choose preset formats or set up your own column width and spacing.

☰ Layout→Page Setup→Breaks 

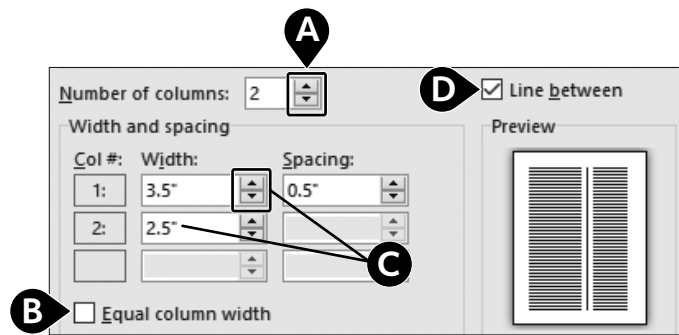
☰ Layout→Page Setup→Columns 


## DEVELOP YOUR SKILLS: W2-D3

*In this exercise, you will insert a section break and lay out the newsletter in columns. Then you will customize the column layout.*

1. Save your file as **W2-D3-RaritanNewsltr**.
2. Position the insertion point on the second blank line below the picture object.
3. Choose **Layout→Page Setup→Breaks**  → **Continuous**.
4. Position the insertion point anywhere above the section break.
5. Choose **Layout→Page Setup→Columns**  and notice that one column is highlighted, since text or images that span the width of the page between the margins are considered one column.
6. Position the insertion point below the section break.
7. Choose **Insert→Text→Object**  **menu button** ▼ → **Text from File**.
8. Navigate to your **Word Chapter 2** folder and double-click **W2-D3-NewsltrTxt**.
9. Choose **Layout→Page Setup→Columns**  and then choose **More Columns** to open the Columns dialog box.



10. Follow these steps to customize the columns:



- Ⓐ Use the spin box to change the number of columns to **2**.
  - Ⓑ Remove the checkmark from this checkbox.
  - Ⓒ Use the spin box to change the width of column 1 to **3.5"** and notice that column 2 resizes automatically.
  - Ⓓ Place a checkmark in the **Line Between** box to add a line between your columns.
11. Click **OK** and then scroll through the document to see the effect.
  12. Choose **Layout**→**Page Setup**→**Columns** →**More Columns**.
  13. Click the **Equal Column Width** checkbox and click **OK**.
  14. Scroll through the document to see how it looks.
  15. Save the file.




## Artistic Effects and Wrapping Text Around a Picture

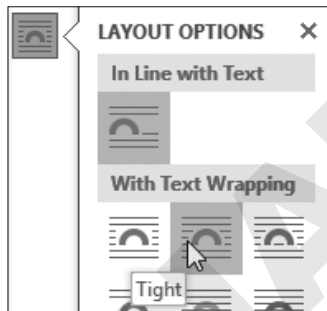
There are many tools on the contextual Format tab that allow you to customize images. Artistic effects can take your image styling to the next level. Some effects represent the image in pencil, paint, and various textures.


 **Picture Tools**→**Format**→**Adjust**→**Artistic Effects** 

## DEVELOP YOUR SKILLS: W2-D4

In this exercise, you will insert a picture and apply an artistic effect as well as a picture style to it. Then you will use the Layout Options smart tag to wrap text around the picture and you will balance the columns at the end of the newsletter.


1. Save your file as **W2-D4-RaritanNews1tr**.
2. Position the insertion point on page 2 to the left of the heading *The New Vaccine*.
3. Choose **Insert**→**Illustrations**→**Pictures** .
4. Navigate to your **Word Chapter 2** folder and double-click **W2-D4-VaccinePic.jpg** to insert the picture in the newsletter.
5. Resize the picture using a corner handle until it is about **1½" wide**.
6. With the picture selected, choose **Picture Tools**→**Format**→**Adjust**→**Artistic Effects**  and then choose **Crisscross Etching**.
7. Choose **Picture Tools**→**Format**→**Picture Styles**→**More**  button on the Picture Styles gallery.
8. Use Live Preview to sample various styles and then choose **Simple Frame, Black**.
9. With the picture selected, click the **Layout Options** smart tag and choose the **Tight** text wrapping option.



10. Click in the document to close the Layout Options gallery.
11. Position the insertion point after the period following *disease* at the end of page 2.
12. Choose **Layout**→**Page Setup**→**Breaks** →**Continuous** to insert a section break and create two more balanced columns.
13. Save your file.


# Inserting Cover Pages

A cover page catches a reader's eye as the first dynamic part of your document. You can easily add professional polish to a document by using a built-in cover page. There are a number of predesigned cover pages for you to choose from. And, if desired, you can modify the color and other design elements to achieve a cover page that best suits your needs.

☰ Insert→Pages→Cover Page 

## DEVELOP YOUR SKILLS: W2-D5

*In this exercise, you will add a cover page to your newsletter. Then you will add text to two text controls and delete text controls that you do not need.*

1. Save your file as **W2-D5-RaritanNews1tr**.
2. Choose **Insert→Pages→Cover Page** , scroll through the gallery of available options, and choose **Banded**.
3. Click the **Document Title** control and type **Raritan Clinic East Newsletter**.
4. Scroll to the bottom of the page, click the **Author** control (it may contain a person's name), and type **November, 2016**.
5. Click the **COMPANY NAME** control, click the **Company** tab at the top to select the entire control, and then tap **Delete**.
6. Use the same technique to delete the **Company Address** control.
7. Save the file.

# Printing Part of a Document

Sometimes you may want to print only part of a longer document—maybe a page or two or even just a couple of paragraphs. This can save both time and supplies. There are several techniques that make this an easy task, and they are found in the Print screen in Backstage view.

Custom Print options allow you to stipulate specific pages to print.

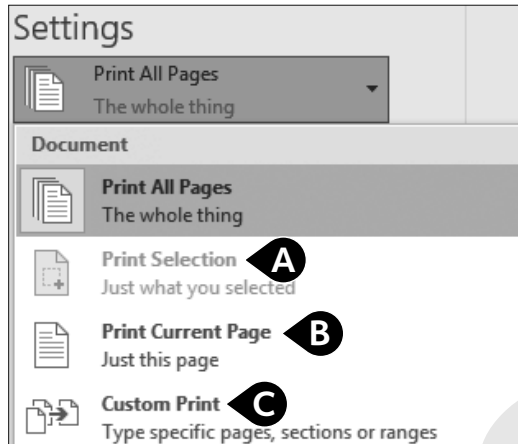
CUSTOM PRINT OPTIONS	
Print Consecutive Pages	Enter the page number of the first page to print, type a hyphen, and then type the page number of the last page to print.
Print Non-Consecutive Pages and Ranges	Enter the page numbers you want to print separated by commas (for example: 3,5,7,10-15).
Print a block of text	Select the text to print. Navigate to the Print screen in Backstage view. Choose Print Selection from the drop-down list.

☰ File→Print

## DEVELOP YOUR SKILLS: W2-D6

*In this exercise, you will explore options for printing part of a document. You will see how to print consecutive and nonconsecutive pages as well as a block of selected text.*

1. Choose **File**→**Print** to display the Print screen in Backstage view.
2. Click the drop-down arrow next to Print All Pages.
3. Follow these steps to review the printing options:




- A** This option is available only when you select text prior to accessing the Print screen.

**B** This choice prints the page where the insertion point is located.

**C** This option allows you to specify printing only certain pages.
4. Click the drop-down arrow to close the menu.



5. If you want to stay green and not print, click the **Back**  button or print to PDF (you can make that choice in the Printer drop-down list).
  6. Save the file and exit Word.
- 

## 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 use a Continuous section break to start a new section on a new page. *True False*
2. Inserting a Next Page section break at the end of columns that you want to balance is a quick trick for accomplishing the task. *True False*
3. Whenever text or images span with width of the page, between the margins, it is considered one column. *True False*
4. You can apply WordArt to existing text. *True False*
5. Whenever you have a page-oriented formatting change—such as margins, page orientation, or columns—within a document, you should separate that content with a section break. *True False*
6. You can insert scanned or other digital pictures into your documents. *True False*
7. In addition to preset column setups, you can set up your own column width and spacing. *True False*
8. When you insert a predesigned cover page, you cannot delete any of the built-in text controls. *True False*
9. The Columns dialog box provides an option to place a line between columns. *True False*
10. What would you specify in the Pages field of the Print screen to print only pages 3, 5, and 7 of a document?
  - A. Page 3, page 5, page 7
  - B. 357
  - C. 3,5,7
  - D. Sections 3, 5, 7
11. Which of the following statements is correct relative to the Columns feature?
  - A. Draft view provides an excellent way to see how your newsletter will look when printed.
  - B. You can use column breaks in place of section breaks.
  - C. The Columns feature provides the ability to vary column widths and spacing.
  - D. You need to set tabs on the ruler before using the Columns feature.

EVALUATION ONLY

WORD 2016

# Working with Long Documents

**L**ong documents are important in both academia and business and range in type from dissertations to research reports. In this chapter, you will use styles to provide consistent heading formatting, which leads the reader's eye through the document. You will customize styles and other features to suit your needs, and you will use several techniques to quickly navigate long documents. Finally, you will work with long tables to make them easy to read and to find information.

## LEARNING OBJECTIVES

- Format with styles
- Create and manage custom styles
- Use themes and style sets
- Navigate long documents
- Format long tables

## CHAPTER TIMING

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

## PROJECT: REPORTING ON COMMON CHILDHOOD ILLNESSES

Raritan Clinic East periodically hosts seminars for parents of young children to discuss common childhood illnesses. As a certified nursing assistant, you have been asked to research these illnesses and compile a report that the clinic will use as a handout for the seminars. You will use styles, themes, and other formatting features to make your report engaging to the reader. Then you will create a table to keep track of the attendees.

# Formatting Text with Styles

A style is a collection of formats that you can apply to text. When you type a document, you are automatically using a style. This is typically the Normal style, which includes Calibri font, 11 pt, left-justified, and so forth. Or, you might be using a custom template that is set up with a different default style. Styles are based on the current template's theme, which is a set of colors, fonts, and graphic effects. Styles help you provide consistent formatting throughout a document.

The Styles gallery on the Ribbon is limited to frequently used styles. For a more in-depth approach and access to more styles, you must open the Styles task pane.



View the video “The Styles Gallery and the Styles Task Pane.”

☰ Home→Styles→dialog box launcher

## Custom Styles

Thus far, you have used Word's built-in styles. However, there may be situations in which the built-in styles do not meet your needs. For example, Raritan Clinic East has formatting standards set for different types of documents. You can create custom styles to meet those standards.

There are two approaches you can take to create custom styles. The method you choose is a matter of personal preference; both are equally effective.

- **Style by definition:** Choose all formats from the Create New Style from Formatting dialog box.
- **Style by example:** Format a block of text with the formats you wish to include in your style. The Create New Style from Formatting dialog box can copy the formats from your formatted text.



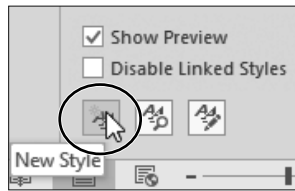
View the video “Create a Style by Definition and a Style by Example.”

### DEVELOP YOUR SKILLS: W3-D1

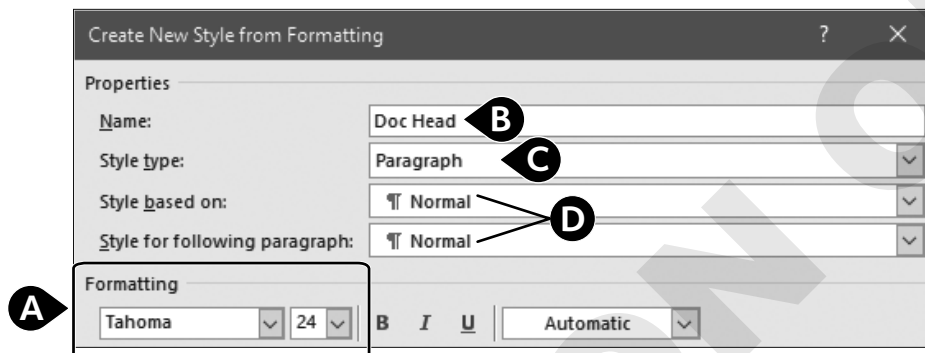
*In this exercise, you will create custom styles. You'll begin by opening the Styles task pane and creating a new style by example for the document heading. Then you will create a style by definition.*

1. Start Word, open **W3-D1-SickKids** from your **Word Chapter 3** folder, and save it as **W3-D1-SickKidsRevised**.
2. Select the *Raritan Clinic East* heading at the top of the document.
3. Choose **Home**→**Font**→**Font menu button** ▼ and then choose **Tahoma** from the menu.
4. Click the **Font Size menu button** ▼ and choose **24 pt**.
5. Choose **Home**→**Paragraph**→**Center** .
6. Choose **Home**→**Styles**→**dialog box launcher** to display the Styles task pane.

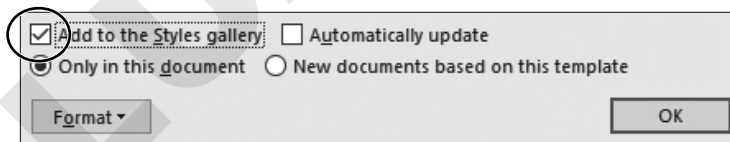
7. At the bottom of the task pane, click the **New Style**  button to open the Create New Style from Formatting dialog box.




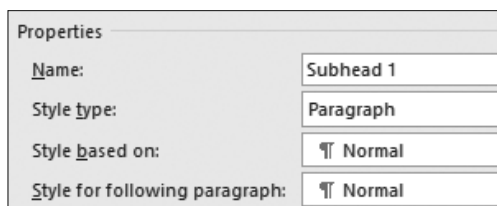
8. Follow these steps to complete the new style:



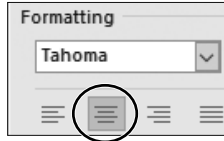
- A** Notice the example formatting that you applied earlier.
- B** Name the style **Doc Head**.
- C** Make sure the Style Type is **Paragraph**.
- D** If necessary, set the new style to be based on the **Normal** style and the formatting for the following paragraph to **Normal**.
9. At the bottom of the dialog box, make sure the **Add to the Styles Gallery** box is checked and then click **OK**.





10. Click in the *Childhood Diseases Seminar* subheading.
11. Click the **New Style**  button at the bottom of the Styles task pane.
12. Set up the top portion of the dialog box as shown.



13. Click the **Format** button at the bottom of the dialog box, choose **Font** to open the Font dialog box, and then choose **Tahoma** from the Font list.
14. Choose **14 pt** as the font size, check the **Small Caps** checkbox, and then click **OK**.
15. Click the **Center** button in the paragraph alignment group and then click **OK**.



16. In the next line, select *WebMD* and format it with **Arial, 14 pt**.
17. Click the **New Style**  button and follow these guidelines to finish creating the style:
  - Name: **Subhead 2**
  - Style Type: **Paragraph**
  - Style Based On: **Normal**
  - Style for Following Paragraph: **Normal**
18. Notice the example font formatting you applied in the Formatting area of the dialog box and then click **OK**.
19. Scroll to page 3, position the insertion point in the subheading *Parents.com*, and choose **Subhead 2** from the Styles gallery.
20. Scroll back up to page 1, position the insertion point in the *RSV* subheading, and choose **Home**→**Font**.
21. Choose the **Arial** font and the **12 pt** font size.
22. Click the **New Style**  button and follow these guidelines to finish creating the style:
  - Name: **Subhead 3**
  - Style Type: **Paragraph**
  - Style Based On: **Normal**
  - Style for Following Paragraph: **Normal**
23. Notice the example settings in the Formatting area and then click **OK**.
24. Click in the *Ear Infection* subheading and choose **Subhead 3** from the Styles task pane.
25. Use the same technique to apply Subhead 3 to the remaining subheadings:
 

<ul style="list-style-type: none"> <li>■ Glue Ear</li> <li>■ Croup</li> <li>■ Hand-Foot-and-Mouth Disease</li> <li>■ Pinkeye</li> <li>■ Fifth Disease</li> </ul>	<ul style="list-style-type: none"> <li>■ Common Cold</li> <li>■ Strep Throat</li> <li>■ Influenza</li> <li>■ Symptoms You Should Never Ignore</li> </ul>
--	--
26. Save the file.




# Modifying Styles and Clearing All Formatting

You can modify a built-in style as well as styles that you create. Modifying styles can help you maintain consistency when you make formatting changes and can speed up that process. You can make global formatting changes by modifying a style. When you change a style, the change is applied to all the text in the current document that is formatted with the style. This eliminates the need to modify each text block individually—a big time saver.

There may be times when it is easier to reformat text from the beginning rather than trying to figure out which formats were used. This can be particularly helpful if you've inherited a heavily formatted document. The Clear All command in the Styles task pane is a quick way to remove styles and all other unwanted formatting from a document or a selected block of text.

## DEVELOP YOUR SKILLS: W3-D2

*In this exercise, you will modify the Subhead 3 style. When you do, you will see how it impacts all text formatted with that style. Then you will use the Clear All feature to remove formatting from a heading.*


1. Save your file as **W3-D2-SickKidsRevised**.
2. Hover the mouse pointer over **Subhead 3** in the Styles task pane and click the drop-down arrow.
3. Choose **Modify** from the menu to open the Modify Style dialog box.
4. Click the **Italic**  button to add that format to the Subhead 3 style and then click **OK**.
5. Scroll through the document and notice that all the subheadings with the Subhead 3 style are now italicized.
6. Select the *Raritan Clinic East* heading at the top of the document, scroll to the top of the Styles task pane, and choose **Clear All**.
7. Click the **Font group dialog box launcher**  and then choose **Tahoma, 22 pt, Small Caps** and click **OK**.
8. Choose **Home**→**Paragraph**→**Center** .
9. Save the file.

## Removing and Deleting Styles

You can remove a style from the Styles gallery on the Ribbon without removing it from the Styles task pane. Because the Styles gallery on the Ribbon is a quick way to get to styles, you should save it for just the styles you use frequently and not clutter it with styles that you don't often use or don't plan to use at all. You can leave the style in the task pane for future use, or, if you prefer, you can delete it from the task pane. Completely deleting a style removes its formatting from the document.



## DEVELOP YOUR SKILLS: W3-D3

*In this exercise, you will remove the Doc Head style from the Styles gallery and then delete it from the task pane.*

1. Save your file as **W3-D3-SickKidsRevised**.
2. If the Doc Head style is not visible in the Styles gallery on the Ribbon, click the **More**  button to open the gallery and then locate the Doc Head style.
3. Right-click on the style name and choose **Remove from Styles Gallery**.
4. Hover the mouse pointer over Doc Head in the Styles task pane, click the drop-down arrow, and choose **Delete Doc Head**.
5. When the message appears verifying the deletion, click **Yes**.
6. Save and close your document.

## Using Themes and Style Sets

Themes and style sets are document-level formatting features that can instantly add color and visual variety to your entire document. A theme is a combination of colors, fonts, and graphic elements that you can apply to any document. Style sets change font and paragraph properties. Themes and style sets create the biggest impact when you use built-in styles.

 Design→Document Formatting→Themes 

 Design→Document Formatting→Style Sets gallery

### Customizing a Theme





You can customize any theme to match your creative side. Changing a theme font changes any text formatted with fonts that have (Headings) or (Body) next to their names in the font list. Calibri Light (Heading) and Calibri (Body) are the theme fonts for the default Office theme. When you change the theme, the associated theme fonts change. You can also customize the theme color. Changing a theme color or font does not permanently change the built-in theme; it modifies only your current document.

## DEVELOP YOUR SKILLS: W3-D4

*In this exercise, you will use a different version of the Childhood Diseases Seminar handout. This version uses Word's built-in styles, and a cover page has been added. You will use Live Preview to examine a variety of themes and style sets, and you will also apply a new theme and style set to your report.*



1. Open **W3-D4-SickKids** from your **Word Chapter 3** folder and save it as **W3-D4-SickKidsRevised**.
2. Scroll to page 1 of the main document and position the insertion point in the *Raritan Clinic East* heading and notice that the built-in Title style is active in the Styles task pane.
3. Position the insertion point in the *Childhood Diseases Seminar* subheading and see that the built-in Heading 1 style is active in the Styles task pane.



4. Examine the other headings, and you can see that built-in styles have been applied.
5. Scroll up to the cover page and choose **Design**→**Document Formatting**→**Themes**  to display the Themes gallery.
6. Hover the mouse pointer over several different themes and observe the changes in your document.
7. Choose the **Frame** theme.
8. Scroll through the document to see the impact of the new theme.
9. Scroll so that the bottom of the cover page and the top of page 1 are both visible.
10. Choose **Design**→**Document Formatting**→**Colors** .
11. Use **Live Preview** to examine the different color schemes to see their effects and then choose **Blue Warm**.
12. Choose **Design**→**Document Formatting**→**Fonts** .
13. Use **Live Preview** to examine the font options and then choose **Franklin Gothic**.
14. Choose **Design**→**Document Formatting** and then click the **More**  button to open the Style Sets gallery.
15. Use Live Preview to examine the different Style Sets and then choose **Centered**.
16. Scroll through the document to see the changes and then close the Styles task pane.
17. Save the file.

## Using Special Characters

Special characters appear in the Symbol dialog box. There is a variety of special characters, including nonbreaking hyphens or spaces. These characters allow you to keep terms together that should remain together on one line, such as dates, phone numbers, and names.


 Insert→Symbols→Symbol →Special Characters

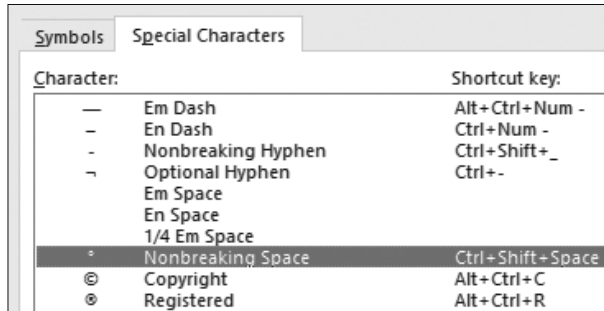
### DEVELOP YOUR SKILLS: W3-D5


*In this exercise, you will insert nonbreaking spaces in doctors' names that appear in the document. This will correct doctors' names that split across two lines, and it's also a safety measure in the event that future edits would cause the name to split across two lines.*

1. Save your file as **W3-D5-SickKidsRevised**.
2. Scroll to page 3 (see page number in Footer), locate the fifth line in the *Common Cold* paragraph, and position the insertion point after *Fred*.

might lead to an overdose," says pediatrician Fred Hirschenfang, M.D.,

3. Tap **Delete** to remove the space.
4. Choose **Insert**→**Symbols**→**Symbol**  and then choose **More Symbols** from the menu.
5. Click the **Special Characters** tab in the Symbol dialog box and choose **Nonbreaking Space**.



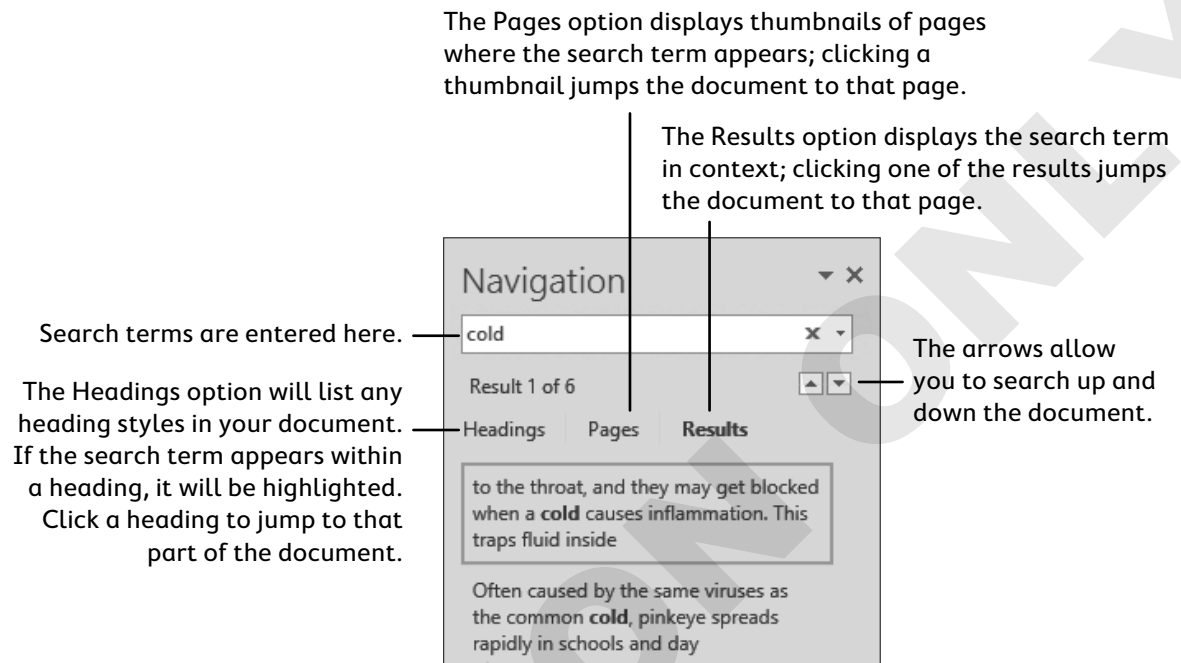
6. Click the **Insert** button at the bottom of the dialog box and then click **Close**.
7. Display the formatting marks to see the character that represents a nonbreaking space.
8. Position the insertion point after the comma following the last name and **Delete** the space.
9. Choose **Insert**→**Symbols**→**Symbol** →**More Symbols**, click the **Special Characters** tab, and choose **Nonbreaking Space**.
10. Click the **Insert** button and then click **Close**.
11. Scroll down to the sixth line in the next paragraph and notice the doctor's name that starts at the end of the line.
12. Position the insertion point after the *y* in *Jay* and tap **Delete**.
13. Press **Ctrl** + **Shift** + **Space** to insert a nonbreaking space.
14. Use the same technique to replace the space following the comma after the last name with a nonbreaking space.
15. Locate *Dr. Hirschenfang's* name starting at the end of the sixth line in the *Influenza* paragraph and replace the space between *Dr.* and his last name with a nonbreaking space.
16. Save the file.

## Navigating Long Documents

A long, complex document can be difficult to navigate. Fortunately, there are a number of helpful tools that make it easier. The Navigation pane provides several ways to move around a document.

## The Navigation Pane

The Navigation pane provides three primary methods for locating a search term in a document: headings, pages, and results.



☰ View→Show→Navigation Pane | Ctrl + F


### DEVELOP YOUR SKILLS: W3-D6

*In this exercise, you will navigate in a long document using several techniques: Navigation pane, bookmarks, and split window.*

1. Save your file as **W3-D6-SickKidsRevised**.
2. Choose **View→Show→Navigation Pane** and enter **cold** as your search term.
3. Choose the Results option at the top of the Navigation pane, click the fourth result, **Common Cold**, and the document jumps to that location.
4. Click the **Headings** option at the top of the Navigation pane.
5. Click the *Ear Infection* heading to jump to that part of the document and notice the search term is highlighted in yellow.
6. Click the **Pages** option at the top of the pane to see thumbnails of the pages that contain the search term.
7. Click the second thumbnail to jump to that page.
8. Click the up and down arrows in the upper-right corner of the Navigation pane to scroll through all occurrences of the term.
9. Close ✕ the Navigation pane.
10. Save and close the file.

# Large Tables






If you're working with large tables, making them user-friendly is important. It should be easy for the reader to scan a table and get information. If possible, columns should be wide enough to prevent text from wrapping within the cells. Adding white space within the table makes the text appear less dense. Repeating column headers from one page to the next is essential for the reader to understand the meaning of the data. Sizing a table to best fit the page adds to its readability.

☰ Table Tools→Layout→Cell Size→dialog box launcher 

☰ Table Tools→Layout→Alignment→Cell Margins 

## DEVELOP YOUR SKILLS: W3-D7

*In this exercise, you will modify a large table, making it easier to read by widening columns where text is wrapping, adding white space within cells, and repeating column headers from page to page. You'll also add a caption to the table.*

1. Open **W3-D7-SeminarAttendees** from your **Word Chapter 3** folder and save it as **W3-D7-SeminarAttendeesRevised**.
2. Choose **Layout**→**Page Setup**→**Orientation**  and choose **Landscape** from the menu.
3. Choose **Table Tools**→**Layout**→**Cell Size**→**dialog box launcher** .
4. In the Table Properties dialog box, if necessary, click the **Table** tab.
5. Change Preferred Width to **9"** and then click **OK**.
6. Choose **Table Tools**→**Layout**→**Alignment**→**Cell Margins** .
7. In the Table Options dialog box, change the top and bottom cell margins to **0.05** and then click **OK**.
8. If necessary, position the insertion point in the first row of the table.
9. Choose **Table Tools**→**Layout**→**Cell Size**→**dialog box launcher**  and click the **Row** tab.
10. Place a checkmark in the **Repeat as Header Row at the Top of Each Page** checkbox and then click **OK**.
11. Scroll down to see the header row at the top of page 2.
12. Choose **References**→**Captions**→**Insert Caption**  and then click the **New Label** button toward the bottom of the dialog box.
13. In the New Label dialog box, type **Childhood Diseases Seminar Attendees** and click **OK**; click **OK** again to close the Caption dialog box.
14. Scroll to the bottom of the document to see the caption.
15. Position the insertion point at the end of the caption and then tap **Backspace** twice to delete the number.
16. Save and close the file; exit Word.

# 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 make a global formatting change by modifying a style. True False
2. If you create a style by example, the Create New Style from Formatting dialog box copies the formats from your formatted text. True False
3. The Clear All command in the Styles task pane removes all styles from the task pane. True False
4. Special characters are on a separate tab in the Symbol dialog box. True False
5. You can use nonbreaking spaces or hyphens to keep terms together that should remain together on one line. True False
6. The Styles gallery provides a more in-depth approach to styles than the Styles task pane. True False
7. When you remove a style from the Styles gallery on the Ribbon, it also removes it from the Styles task pane. True False
8. Style sets change font and paragraph properties. True False
9. Changing a theme color or font permanently changes the built-in theme. True False
10. Which of the following is NOT an option for locating a search term via the Navigation pane?
  - A. Pages
  - B. Results
  - C. Themes
  - D. Headings
11. Which is true about themes?
  - A. You cannot change the color for a theme font.
  - B. Changing a theme font permanently changes the built-in theme.
  - C. Theme fonts are those with (Headings) or (Body) next to their names.
  - D. When you change a theme font, all text in the document is changed.
12. Which of the following add to a table's readability?
  - A. Repeating column headers from one page to the next
  - B. Sizing the table to best fit the page
  - C. Adding white space
  - D. All of these options

EVALUATION ONLY

WORD 2016

# Organizing Long Documents

**P**lowing through a long document can be challenging for the reader if it is not well-organized. Word offers several great tools for organizing documents. A table of contents and an index help readers locate specific topics and terms. Headers and footers display important information, such as page numbers and chapter names. In this chapter, you will work with these tools, organizing long documents and making them more accessible to the reader.

## LEARNING OBJECTIVES

- Create a table of contents
- Work with multiple headers and footers
- Insert an index
- Add a watermark

## CHAPTER TIMING

- Concepts/Develop Your Skills: 2 hrs 30 mins
- Self-Assessment: 20 mins
- Total: 2 hrs 50 mins

## PROJECT: ORGANIZING A LONG DOCUMENT


The Raritan Clinic East policies and procedures manual contains principles and guidelines adopted by the clinic to reach its long-term goals. It influences all major decisions and activities in day-to-day operations. You recently accepted a position in the human resources department at Raritan Clinic. You have been tasked with reviewing the current policies and procedures manual, and you have identified numerous “finishing” features that need to be added to the manual to make it easier to use. By adding a table of contents, index, and headers and footers, you believe the document will be more user-friendly.

# Creating a Table of Contents

Readers appreciate a good table of contents. It outlines the document and adds a professional appearance. And if the document is electronic, the table of contents links provide Internet-like navigation.

The Table of Contents (TOC) feature automatically builds a table of contents by gathering up the headings that are formatted with heading styles. The headings in the TOC are organized in the sequence in which they appear in the document. In addition, TOC styles are applied that correspond to the heading levels. The styles then format the table entries. For example, Heading 2 entries are subordinate to Heading 1 entries. You can automatically update a table of contents created with the built-in heading styles.

You can apply a predesigned table of contents format from the Table of Contents gallery, or you can create a custom table of contents, which gives you more control over the formatting.

☰ References → Table of Contents → Table of Contents 

## Creating a Page for the Table of Contents

In most documents, the table of contents appears either at the beginning of the document or just after the title page in documents containing a title page. Because the table of contents is often created after the document is complete, you may need to create a new page to hold the table.

When headers and footers or other page-level formatting such as page numbering appears in a document, it is better to create a page to hold the table of contents using a section break. This allows flexibility, such as numbering the table of contents page(s) with Roman numerals (i, ii, iii) and the rest of the document with Arabic numerals (1, 2, 3).

## Table of Contents Links





A table of contents is inserted as a large field composed of various table entries. Each entry within the table functions as a hyperlink. You can quickly navigate in the document using the links.

Table of Contents	
Mission Statement .....	
Scope of Services .....	Current Document Ctrl+Click to follow link
Patient Management Procedures .....	



## DEVELOP YOUR SKILLS: W4-D1

In this exercise, you will open the Raritan Clinic East policies and procedures manual and review its heading styles. Then you will create a table of contents and navigate in the document using the links. Finally, you will remove the table of contents.

1. Start Word, open **W4-D1-RaritanP&P** from your **Word Chapter 4** folder, and save it as **W4-D1-RaritanP&PRevised**.
  2. Choose **Home**→**Styles**→**dialog box launcher** .
  3. Scroll to the first page of the body of the document and position the insertion point in the heading *Mission Statement*.
  4. Position the insertion point in several additional headings on page 2.
  5. Close the Styles task pane and then position the insertion point in front of the heading *Mission Statement*.
  6. Choose **Layout**→**Page Setup**→**Breaks**  and then choose **Next Page**.
  7. If necessary, display formatting marks; then scroll up and position the insertion point to the right of the paragraph symbol, just in front of the section break, and tap **Enter**.
  8. Choose **References**→**Table of Contents**→**Table of Contents**  and then choose **Automatic Table 2** from the gallery.
  9. Scroll up and review the table of contents.
  10. Hover the mouse pointer over the *Initial Diagnostic Evaluation* entry in the table and notice the pop-up message.
  11. Press **Ctrl** and click the link, and Word jumps to that heading in the document.
  12. Scroll up to the top of the table of contents and then click the table to select it.
  13. Click the **Table of Contents**  button in the upper-left corner and choose **Remove Table of Contents** at the bottom of the menu.
  14. Save the file.
-

## The Update Table Button

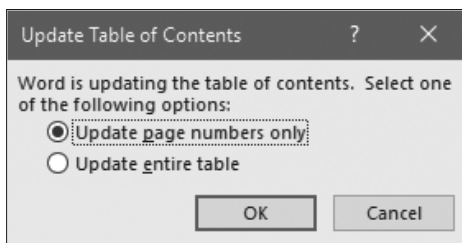
When you make changes to headings or move text in a document, you need to update the table of contents. There is an Update Table button that makes this task easy. Whenever the insertion point is anywhere in the table of contents, two buttons appear in the upper-left corner of the table.

The Table of Contents button displays the Table of Contents gallery, including a command to remove the table.



The Update Table button updates the table of contents with the latest changes.

When you click the Update Table button, a dialog box presents options for updating page numbers only or the entire table. Choose the page numbers option if you have been adding text but haven't changed any headings.



☰ References → Table of Contents → Update Table | **F9**

## The Table of Contents Dialog Box

The Table of Contents gallery provides the fastest method for creating a table of contents, but if you wish to have more control over the formatting of your table, you can use the Table of Contents dialog box. When you use the dialog box, you must also manually add the title that precedes the table. In addition, there are no Table of Contents or Update Table buttons at the top of the table as there are for a table generated from the Table of Contents gallery. To update a manual table of contents, you can use the **F9** shortcut keystroke.



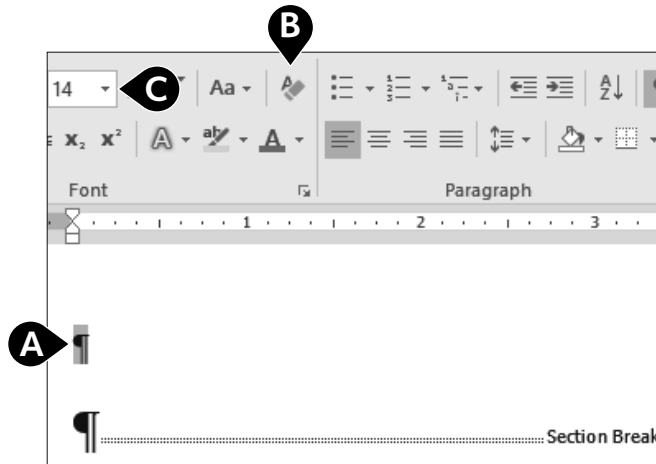
View the video “Creating a Custom Table of Contents.”


### DEVELOP YOUR SKILLS: W4-D2

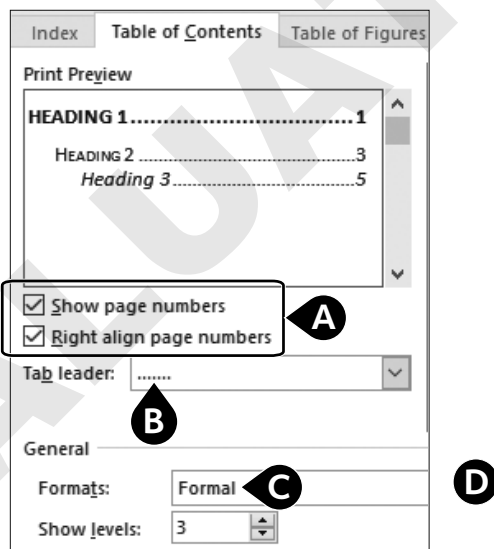
*In this exercise, you will insert a custom table of contents using the Table of Contents dialog box. Then you will edit a heading and update the table of contents.*

1. Save your file as **W4-D2-RaritanP&PRevised** and, if necessary, display formatting marks.
2. Tap **Enter** to create a new, blank line.

3. Follow these steps to format and add the table title:



- A Select this paragraph symbol.
  - B Choose **Home**→**Font**→**Clear All Formatting**.
  - C Change the font size to **14 pt**.
4. Type **Table of Contents** and tap **[Enter]**.
5. Choose **References**→**Table of Contents**→**Table of Contents** .
6. Choose **Custom Table of Contents** at the bottom of the gallery to open the Table of Contents dialog box.
7. Follow these steps to generate a table of contents:

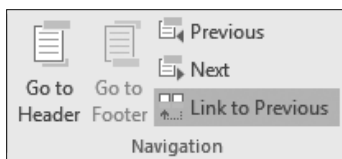


- A Make sure these checkboxes are checked.
- B Make sure that dots are chosen here.
- C Choose **Formal** as the format.
- D Click **OK**.

8. Scroll to the bottom of the table and delete the extra paragraph symbol.
9. Locate the heading *Patient Attendance and Billing* on page 4 of the document and change *Attendance* to **Appointments**.
10. Scroll up and position the insertion point in the table of contents.
11. Tap **F9** to begin the update; when the Update Table of Contents dialog box appears, choose **Update Entire Table** and click **OK**.
12. Save your file.

## Multiple Headers and Footers

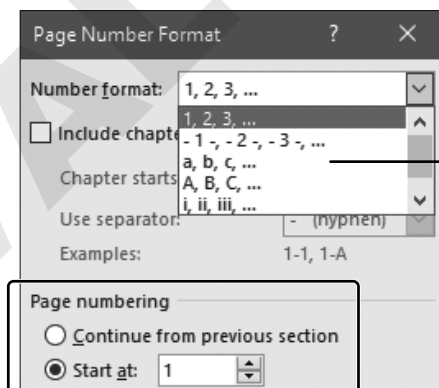
Initially, the header and footer content is the same throughout a document because the Link to Previous feature is turned on by default, as shown in this illustration.



When a document contains multiple sections, you can break the link between sections and thereby create a new header and footer for each document section. For example, suppose you want to number the front portion of a long document using small Roman numerals and the body of the document using Arabic numerals. Separating the document into sections is the first important step before creating multiple headers and footers within a document.

## Restarting and Formatting Page Numbers

When you have more than one section in a document, you may wish to control the starting page number within a section. Typically, the body of a document should start at page 1 rather than continuing the Roman numerals from the front matter. You may also want to control the page number formats. The Page Number Format dialog box provides options to restart numbering and to modify the number format, such as changing from Roman numerals to Arabic numerals.

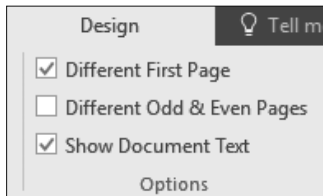


You can choose from a variety of page numbering formats.

You can continue page numbering from the previous section or restart numbering with a specific number.


## Different First Page Header or Footer

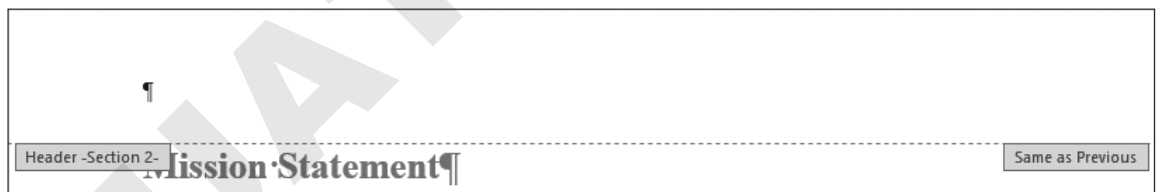
There may be times when all you want to do is set up a different header or footer on the first page of a document. For example, suppose you want all pages of a document numbered in the footer area of each page except for the cover page. You can set a different first page header or footer simply by choosing the Different First Page option.









### DEVELOP YOUR SKILLS: W4-D3

*In this exercise, you will insert header text that will appear in both sections of the document. You will also break the connection between footers so you can have different footers in each section, and then you will change the starting page number on the second page of the document.*

1. Save your file as **W4-D3-RaritanP&PRevised** and, if necessary, display formatting characters.
2. Position the insertion point in **section 2**, which begins with *Mission Statement*.
3. Choose **Insert**→**Header & Footer**→**Header**  and then choose **Edit Header** at the bottom of the gallery.
4. Take a moment to observe the header area.



5. Tap **Tab**  to position the insertion point at the center of the header area and then type **DRAFT**.
6. Format the header text with **bold, 14 pt**, and then double-click in the body of the document to close the header area.
7. Scroll up to the table of contents.
8. Scroll down and position the insertion point in **section 2**.
9. Choose **Insert**→**Header & Footer**→**Footer**  and then choose **Edit Footer**.
10. Choose **Header & Footer Tools**→**Design**→**Navigation**.
11. Click the **Link to Previous**  button to turn it off and break the link between the two sections.

12. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Footer**  and then choose **Blank**.
  13. Click **Type Here** and type **Policies & Procedures Manual**.
  14. Tap **Tab** to position the insertion point in the center of the footer area and then type **Raritan Clinic East**.
  15. Tap **Tab** to position the insertion point at the right side of the footer.
  16. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .
  17. Choose **Current Position** and then choose **Plain Number**.
  18. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .
  19. Choose **Format Page Numbers** and then choose **Start At**.
  20. Click **OK** to restart page numbering with a 1 and then double-click in the document body to close the header and footer areas.
- Page numbering

Continue from previous section

Start at:
21. Scroll up and notice that the footer does not appear on the table of contents page.
  22. Scroll down and observe the footer text in the rest of the document.
  23. Scroll to the table of contents and position the insertion point in the table of contents.
  24. Tap **F9**, choose **Update Entire Table**, and then click **OK**.
  25. Save your file.
- 


## Creating an Index


Adding an index to a document gives the reader an easy way to find important words. To create an index, you mark the entries and then generate the index. The entries you mark are sorted alphabetically and their page numbers are inserted.

### Marking Index Entries

When entries and subentries are marked, it's important to note that marking index entries is a case-sensitive action. If you mark all occurrences of a word such as *Billing* for inclusion in the index, only those occurrences of the word where the *B* is capitalized are marked. So, it's important to consider which occurrences you want marked before selecting **Mark All**.

View the video “Main Entries and Subentries.”


 References→Index→Mark Entry

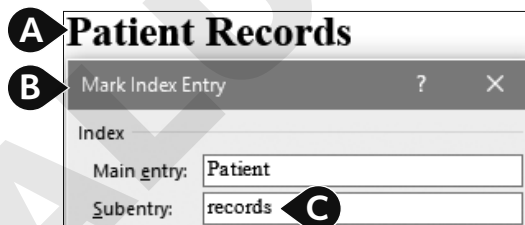
 References→Index→Insert Index

 References→Index→Update Index

## DEVELOP YOUR SKILLS: W4-D4

In this exercise, you will mark index entries and subentries in preparation for generating an index.

1. Save your file as **W4-D4-RaritanP&PRevised**.
2. Go to the first page of the body of the manual and select the heading *Mission Statement*.
3. Choose **References**→**Index**→**Mark Entry** .
4. Type **Goals** in the Main Entry field to replace the text that was automatically inserted in the Mark Index Entry dialog box.
5. Click **Mark** at the bottom of the dialog box.
6. If necessary, drag the dialog box to the side and notice that the code { XE "Goals" } was inserted into the document.
7. Select the word *specialties* at the end of the second line in the second paragraph under the *Mission Statement* heading.
8. Click the Mark Index Entry dialog box to activate it and then click **Mark** to use the proposed text as the main entry.
9. Select *General Medicine* in the first line of the third paragraph below Scope of Services, click the dialog box to activate it, and click **Mark**.
10. Scroll down and select *Patient* in the heading *Patient Appointments and Billing*, click the dialog box, and click **Mark**.
11. Select *Billing* in the heading *Patient Appointments and Billing* and then click the dialog box.
12. Click **Mark All** to mark all occurrences of *Billing* for inclusion in the index.
13. Select *billing* toward the end of the first line in the third paragraph below *Patient Appointments and Billing*, click the dialog box, and click **Mark All**.
14. If necessary, scroll down to the *Patient Records* heading; then follow these steps to mark records as a subentry:



- A Select *Patient* in the heading.
  - B Click the **Mark Index Entry** dialog box to activate it.
  - C Type **records** in the Subentry field and click **Mark**.
15. Navigate to the second paragraph below the *Patient Records* heading, select *files* in the first line, and click the dialog box to activate it.
16. Double-click *files* in the Main Entry field and then press **Ctrl** + **X**.
17. Click the **Subentry** field and then press **Ctrl** + **V** to paste *files* into the field.

18. Type **Patient** in the Main Entry field and then click **Mark**.
19. Close the **Mark Index Entry** dialog box.
20. Save your file.

## Generating Index Entries Using a Concordance

If a document is extremely long, marking index entries can be overwhelming. There is an automatic option for marking words and phrases to be included in an index. This option allows you to create a list of words and phrases you want to include and saves it as a separate file that acts as a concordance file.

When you use a concordance file to generate an index, it's important to know how it works. These guidelines will provide you with some basic information.


- The list of words and phrases to be included as main entries should be typed in one column straight down the left margin of the document or in the first column of a table.
- The document should contain only the words and phrases to be marked.
- To mark entries with subentries, create the concordance using a table layout. In the first column, type the words you want to mark as the main entry. In the second column, type the main entry followed by a colon, followed by the text for the subentry, without spaces.

patient	patient:records
---------	-----------------

- Entries can be listed in any order in the concordance. They will be sorted and grouped alphabetically when you generate the index. However, sorting the words helps identify duplicate words in the concordance.

### DEVELOP YOUR SKILLS: W4-D5

*In this exercise, you will mark index entries using a concordance document.*

1. Save your file as **W4-D5-RaritanP&PRevised**.
2. Open **W4-D5-P&PConcordance** from your **Word Chapter 4** folder.
3. Scroll through the document, review its contents, and then close the document.
4. Position the insertion point anywhere on the title page at the top of the document.
5. Choose **References**→**Index**→**Insert Index** .
6. Click **AutoMark** at the bottom of the dialog box to display the Open Index AutoMark File dialog box.
7. Navigate to your **Word Chapter 4** folder and double-click **W4-D5-P&PConcordance**.
8. Scroll through and review the document.
9. Turn off formatting marks. Because index codes can be quite lengthy, displaying them can cause text to roll onto other pages, making page numbers inaccurate.
10. Save the file.



## Inserting and Updating the Index

After all the index entries are marked, you can insert the index using the Index dialog box. You can choose the overall format for the index and select several other formatting options. You can update an index in the same manner as a table of contents.

☰ References→Table of Contents→Update Index | F9

There are several ways you can modify an index once you create it. You can:

- use the Index dialog box to change various formatting options.
- format the index directly.
- change the text of an entry by replacing it directly in the code that was originally created and then update the index.
- delete an entry by removing the code and updating the index.

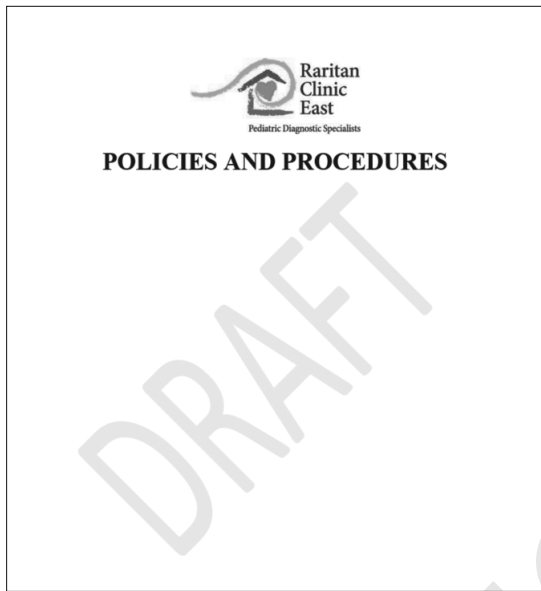
### DEVELOP YOUR SKILLS: W4-D6

*In this exercise, you will generate and format an index.*

1. Save your file as **W4-D6-RaritanP&PRevised**.
  2. Press Ctrl + End or scroll down to move to the end of the document.
  3. Type the heading **Index** and tap Enter.
  4. Select the heading and format the text as **bold, 16 pt**.
  5. Position the insertion point on the blank line below the Index heading.
  6. Choose **References**→**Index**→**Insert Index** ☰.
  7. Choose **Formal** from the Formats list at the bottom of the dialog box and then click **OK**.
  8. Click anywhere in the index and then choose **References**→**Index**→**Insert Index** ☰.
  9. Choose **Modern** at the bottom of the dialog box and then choose **Run-In** at the top-right corner.
  10. Click **OK**; click **OK** again when the message appears asking if you want to replace the index.
  11. Click **Undo** ↶ to reverse the change.
  12. Save the file.
-

# Watermarks


A watermark is text or a graphic placed behind text or other objects in a document; it is visible only in Print Layout or Read Mode view. Some common watermarks include a faint image of the word *Draft* or *Confidential* in the background.



☰ Design→Page Background→Watermark

## DEVELOP YOUR SKILLS: W4-D7

*The changes made to the policies and procedures manual need to be approved by your manager. Although the word DRAFT appears in the header, you've decided that using the word as a watermark would be more effective. In this exercise, you will delete the term in the header and then add a watermark to the document.*

1. Save your file as **W4-D7-RaritanP&PRevised**.
2. Position the insertion point at the top of the document and double-click the header area to open it.
3. Select the word *DRAFT* and tap **Delete**.
4. Double-click in the body of the document to close the header area.
5. Choose **Design→Page Background→Watermark**  and then choose **Draft 1** from the gallery.
6. Scroll through a few pages to view the watermark.
7. Save and close the file; exit Word.

# 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. If pagination changes in a document, the table of contents automatically regenerates. True False
2. The first step in creating an index is to mark the main index entries and subentries. True False
3. The Link to Previous button is used to break connections between headers and footers in different sections. True False
4. If you want to change the format of an index, you must delete the index and start over. True False
5. To set up a different header or footer on the first page of a document, just check Different First Page on the contextual Design tab. True False
6. When generating an index, turning off formatting marks ensures the page numbers are accurate. True False
7. Adding a section break allows you to use different numbering styles in different sections of a document. True False
8. Marking index entries is a case-sensitive task. True False
9. By default, the header and footer in each section of a multi-section document are the same because the headers and footers are linked. True False
10. The Table of Contents feature automatically builds a table of contents by gathering the headings that are formatted with heading styles. True False
11. Which statement is NOT correct regarding creating a table of contents via the Table of Contents dialog box?
  - A. You must manually add the title that precedes the table.
  - B. There is no Table of Contents button at the top of the table.
  - C. You can update the table using the **F9** key.
  - D. This is the fastest way to create a table of contents.
12. Watermarks are visible in which view(s)?
  - A. Read Mode and Print Layout
  - B. Web Layout and Print Layout
  - C. Draft Mode
  - D. Read Mode and Web Layout
13. Which statement is accurate regarding an index?
  - A. Index entries are automatically sorted by page number.
  - B. You cannot edit main-entry text once it appears in the Mark Index Entry dialog box.
  - C. You can use a concordance file to generate an index.
  - D. If you make changes to text marked as an index entry, Word updates the index automatically.

(continued)

14. Which statement is correct regarding a table of contents?
- A. Table of contents entries function as hyperlinks.
  - B. You can update a table of contents by tapping **F10**.
  - C. The Table of Contents button in the upper-left corner of the table of contents field updates the table of contents.
  - D. You cannot control its format if you generate it through the Table of Contents dialog box.

EVALUATION ONLY

# Self-Assessment Answer Key

## CHAPTER 1: USING MAIL MERGE

Item	Answer	Page Number
1	False	14
2	True	4
3	True	5
4	False	13
5	True	6
6	True	4
7	False	2
8	False	12
9	True	8
10	False	15
11	D	8
12	B	2
13	B	2
14	D	14

## CHAPTER 2: CREATING A NEWSLETTER

Item	Answer	Page Number
1	False	24
2	False	25
3	True	24
4	True	20
5	True	24
6	True	23
7	True	24
8	False	27
9	True	25
10	C	27
11	C	24

## CHAPTER 3: WORKING WITH LONG DOCUMENTS

Item	Answer	Page Number
1	True	35
2	True	32
3	False	35
4	True	37
5	True	37
6	False	32
7	False	35
8	True	36
9	False	36
10	C	39
11	C	36
12	D	40

## CHAPTER 4: ORGANIZING LONG DOCUMENTS

Item	Answer	Page Number
1	False	46
2	True	50
3	True	49
4	False	53
5	True	49
6	True	52
7	True	44
8	True	50
9	True	48
10	True	44
11	D	46
12	A	54
13	C	52
14	A	44

EVALUATION ONLY

# Index

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