

Microsoft® **Word 2019 & 365**

LEVEL 3 OF 3

BEN LINFORD

Southwest Applied Technology College
and Southern Utah University

Microsoft Word 2019 & 365: Level 3

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Labyrinth Learning
PO Box 2669
Danville, CA 94526
800.522.9746
On the web at lablearning.com

President:
Brian Favro

Product Manager:
Jason Favro

Development Manager:
Laura Popelka

Senior Editor:
Alexandra Mummery

Editor:
Alexandria Henderson

Developmental Editor:
Sudha Putnam

Production Manager:
Debra Grose

Compositor:
Happenstance Type-O-Rama

Indexing:
BIM Creatives, LLC

Cover Design:
Sam Anderson Design

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EVALUATION ONLY

Preface

This textbook is part of our new approach to learning for introductory computer courses. We've kept the best elements of our proven, easy-to-use instructional design and added interactive elements and assessments that offer enormous potential to engage learners in a new way.

Why Did We Write This Content?

In today's digital world, knowing how to use the most common software applications is critical, and those who don't are left behind. Our goal is to simplify the entire learning experience and help every student develop the practical, real-world skills needed to be successful at work and in school. Using a combination of text, videos, interactive elements, and assessments, we begin with fundamental concepts and take learners through a systematic progression of exercises to achieve mastery.

What Key Themes Did We Follow?

We had conversations with dozens of educators at community colleges, vocational schools, and other learning environments in preparation for this textbook. We listened and adapted our learning solution to match the needs of a rapidly changing world, keeping the following common themes in mind:

Keep it about skills. Our content focus is on critical, job-ready topics and tasks, with a relentless focus on practical, real-world skills and common sense. We use step-by-step instructional design to ensure that learners stay engaged from the first chapter forward. We've retained our proven method of progressively moving learners through increasingly independent exercises to ensure mastery—an approach that has successfully developed skills for more than 25 years.

Keep it simple. Our integrated solutions create a seamless experience built on a dynamic instructional design that brings clarity to even the most challenging topics. We focus our content on the things that matter most and present it in the easiest way possible. Concise chunks of text are combined with visually engaging and interactive elements to increase understanding for all types of learners.

Keep it relevant. Fresh, original, and constantly evolving content helps educators keep pace with today's student and work environments. We reviewed every topic for relevancy and updated it where needed to offer realistic examples and projects for learners.

How Do I Use This Book?

Our comprehensive learning solution consists of a print textbook, a groundbreaking interactive ebook, and our easy-to-use eLab course management tool featuring additional learning content, such as overviews and video tutorials, and assessment content. Our interactive ebook contains learning content delivered in ways that will engage learners.

The eLab assessment solution includes Project Grader exercises for most chapters that are automatically graded by the system, in addition to clear feedback and analytics on student actions.

Included with Your Textbook Purchase

Depending on your purchase option, some or all of the following are included with your textbook:

Interactive ebook: A dynamic, engaging, and truly interactive textbook that includes elements such as videos, self-assessments, slide shows, GIFs, and other interactive features. Highlighting, taking notes, and searching for content is easy.

eLab Course Management System: A robust tool for accurate assessment, tracking of learner activity, and automated grading that includes a comprehensive set of instructor resources. eLab can be fully integrated with your LMS, making course management even easier.

Instructor resources: This course is also supported on the Labyrinth website with a comprehensive instructor support package that includes detailed lesson plans, lecture notes, PowerPoint presentations, a course syllabus, test banks, additional exercises, and more.

Student Resource Center: The exercise files that accompany this textbook can be found within eLab and in the Student Resource Center, which may be accessed from the ebook or online at:

labyrinthelab.com/office19

We're excited to share this innovative, new approach with you, and we'd love you to share your experience with us at: lablearning.com/share

Visual Conventions

This book uses visual and typographic cues to guide students through the lessons. Some of these cues are described below:

Cue Name	What It Does
Type this text	Text you type at the keyboard is printed in this typeface.
Action words	The important action words in exercise steps are presented in boldface.
Ribbon	Glossary terms are highlighted with a yellow background.
  	Tips, notes, and warnings are called out with special icons.
	Videos, WebSims, and other ebook or online content are indicated by this icon.
Command → Command → Command → Command	Commands to execute from the Ribbon are presented like this: Ribbon Tab→Command Group→Command→Subcommand.
 Design → Themes → Themes 	These notes present shortcut steps for executing certain tasks.

Display Settings

Multiple factors, including screen resolution, monitor size, and window size, can affect the appearance of the Microsoft Ribbon and its buttons. In this textbook, screen captures were taken at the native (recommended) screen resolutions in Office 2019 running Windows 10, with ClearType enabled.

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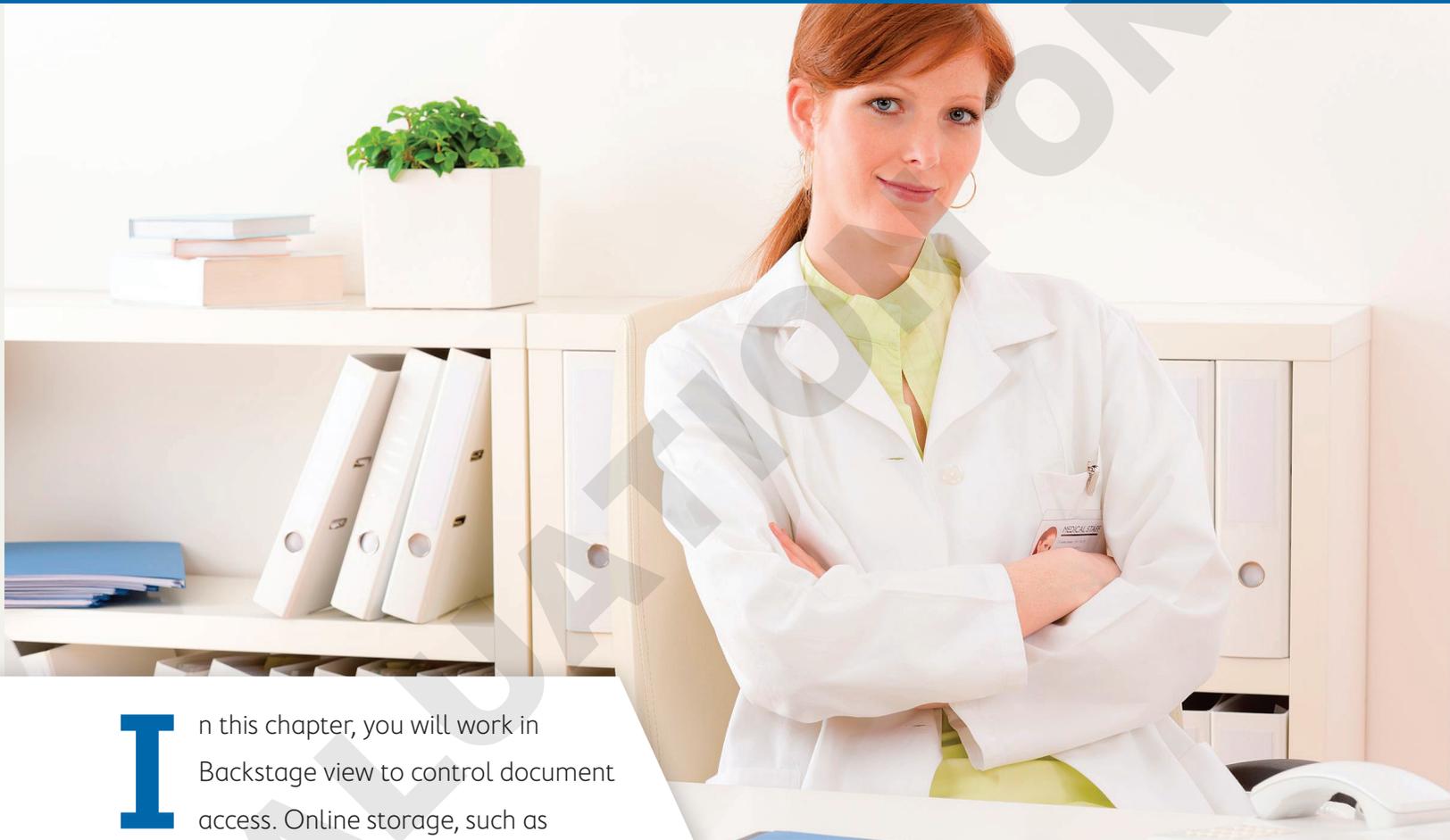
Peter Young, *San Jose State University*

EVALUATION ONLY

WORD

10

Sharing and Securing Content



In this chapter, you will work in Backstage view to control document access. Online storage, such as OneDrive, allows people to store and retrieve documents from any computer with Internet access, and virtual collaboration means that your documents are often in others' hands. There are features that help you control document content and security and guard your personal information.

LEARNING OBJECTIVES

- ▶ Use file compatibility features
- ▶ Check documents with the Document Inspector
- ▶ Restrict formatting and editing in a document
- ▶ Mark a document as final
- ▶ Secure documents with passwords and digital signatures

Project: Securing Confidential Information

At Raritan Clinic East, privacy and security of patient records are vitally important. As a Raritan employee, you will explore features that ensure that documents sent outside the clinic remain confidential and contain no information that could enable those receiving the documents to learn more about patients than they need to know. You will use Backstage view and identify some of the security features you can use.

Preparing Documents for Sharing

There are a number of things to think about when sharing documents with colleagues or clients. For one, compatibility issues between the current and earlier versions of Word should be considered. Additionally, documents can contain hidden or personal information about your organization or about the document that you do not want to share publicly. The **Document Inspector** can help you deal with these matters.

Compatibility Issues

The most recent versions of Word (2007–2019) use the *.docx* file format. Versions of Word prior to 2007 use a *.doc* file format. Benefits of the latter format include smaller file size, improved damaged-file recovery, and more control of personal information. It's important to understand how the current version of Word behaves with documents created in earlier versions. Likewise, you need to make sure your documents can be read by people using earlier versions. There are several things to think about when dealing with compatibility issues:

- ▶ The latest versions—Word 2019, 2016, and 2013—are compatible.
- ▶ Word 2007, 2010, 2013, and 2016 can open *.docx* files created in Word 2019.
- ▶ Documents opened in Word 2019 that were created in Word 2016 or earlier open in **Compatibility Mode**. The features in Word 2019 are downgraded to be compatible with the older versions. The term *[Compatibility Mode]* appears in the title bar.
- ▶ To open a Word 2019 document in Word 2010 or earlier, install the **Compatibility Pack** for Word, which you can download for free from the Microsoft website.
- ▶ You can **convert** documents to Word 2019 that were created in versions prior to Word 2016.
- ▶ You can save a Word 2019 document as a Word 97–2003 document so it can be opened by users of those versions. Some features of the current version either won't be available or will be modified in a manner more compatible with older versions.

DEVELOP YOUR SKILLS: W10-D1

In this exercise, you will open a Word 2003 document in Word 2019 Compatibility Mode. You will then try to insert a Word 2019 SmartArt graphic (a new feature) in the 2003 document and see how Compatibility Mode deals with this feature.

Before You Begin: Download the student exercise files from your eLab course or the Student Resource Center (labyrinthelab.com/office19) and determine your file storage location before beginning this exercise.

1. Open **W10-D1-2003ProcMan** from your **Word Chapter 10** folder and save it as: **W10-D1-2003ProcManRevised**

Notice [Compatibility Mode] in the title bar at the top of the screen.

W10-D1-2003ProcManRevised.doc [Compatibility Mode] - Word

You will attempt to add a Word 2019 SmartArt graphic to the Word 2003 Compatibility Mode document.

2. If necessary, display formatting marks; position the insertion point in front of the paragraph mark at the top of page 2.
3. Choose **Insert**→**Illustrations**→**SmartArt** .

Word opens the Word 2003 Diagram Gallery rather than the Word 2019 SmartArt gallery because the Compatibility Mode document cannot work with Word 2019's SmartArt feature.
4. Click **Cancel** to close the Diagram Gallery.

Next you will observe how Word saves the Compatibility Mode document.
5. Choose **File**→**Save As** and navigate to your **Word Chapter 10** folder.

Word 2019 defaults to the Word 97–2003 format in the Save As Type field. Word does this unless you purposely convert the document to a .docx format or save it as a Word Document (*.docx) via the Save As Type drop-down list.
6. Click **Cancel** and then click **Back**  in the upper-left corner to return to the document.

Note!

Always leave your file open at the end of an exercise unless instructed to close it.

To Convert or Not to Convert?

If most of the people you share documents with are using pre-2007 versions of Word, it's a good idea to keep their documents in Compatibility Mode. This ensures that documents will look the same in Word 2019 as they do in the older version. It also ensures that the features available in Word 2019 will be limited to, or similar to, the features available in older versions.

Choosing a Conversion Method

If you are working with a Compatibility Mode document that would benefit from the full functionality of Word 2019 features that are currently disabled or limited, you have a candidate for conversion. When you convert the document, Word 2019 turns on the new and enhanced features.

There are two ways to convert an older version (.doc) document to a Word 2007–2019 (.docx) document:

- ▶ **Convert:** The Convert command appears on the Info screen in Backstage view when a document is open in Compatibility Mode. Using the command performs a conversion that overwrites the original document. As a result, the older version document is no longer available.
- ▶ **Save As:** When you resave and rename a document using the Save As command, you are actually making a *copy* of the document. When you perform a Save As with a Compatibility Mode document, you still have the original .doc file and you create a new second file, a .docx file.

☰ File→Info→Convert

☰ File→Save As

Consider the User

Before converting, keep in mind the person who sent you the document or the person to whom you are sending a document. If you are editing a document that needs to be returned to someone who is using an earlier version of Word, leave the document in its original format instead of converting it.

The Office Compatibility Pack

People who have earlier versions of Word and who need to work with Word 2019 documents can download a free compatibility pack from the Microsoft website to open, edit, and save Word 2019 documents. However, some features will still not be available.

DEVELOP YOUR SKILLS: W10-D2

In this exercise, you will convert a Word 2003 document to the .docx format and then add a Word 2019 SmartArt graphic.

1. Save your file as: **W10-D2-2003ProcManRevised**
2. Choose **File→Info→Convert**.

A message appears indicating that conversion may cause some minor layout changes. For example, in this document, the pagination is altered slightly when converted.

3. Click **OK** to acknowledge the message.

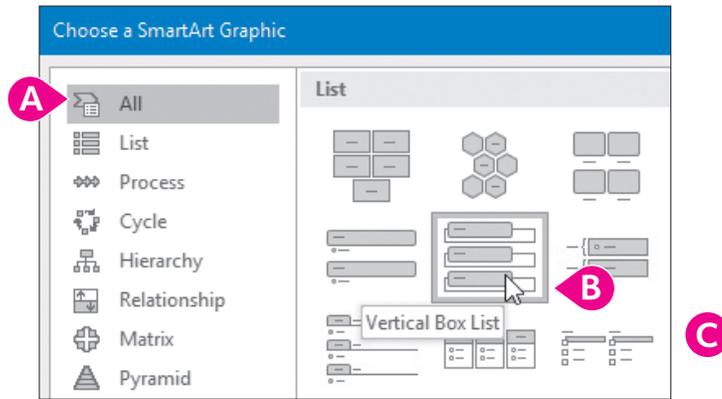
Notice that Compatibility Mode has disappeared from the title bar.

4. Position the insertion point on page 2 at the beginning of the first paragraph below the *Scope of Services* heading and make sure the insertion point is to the left of the tab that begins that paragraph.

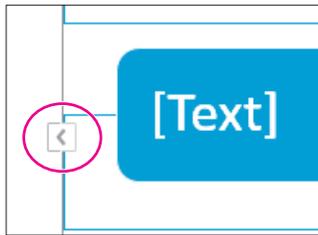
5. Tap **Enter** and then position the insertion point next to the paragraph mark for the blank line you just created and choose **Insert→Illustrations→SmartArt** .

Because you converted the document, the SmartArt gallery is now available.

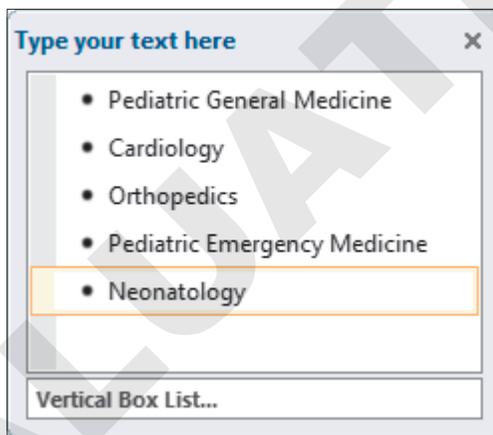
6. Follow these steps to insert a SmartArt graphic:



- A If necessary, choose **All** from the category list.
- B Choose the **Vertical Box List** graphic.
- C Click **OK**.
7. If necessary, click the tab at the left side of the graphic to open the Type Your Text Here pane.



8. Type this text:



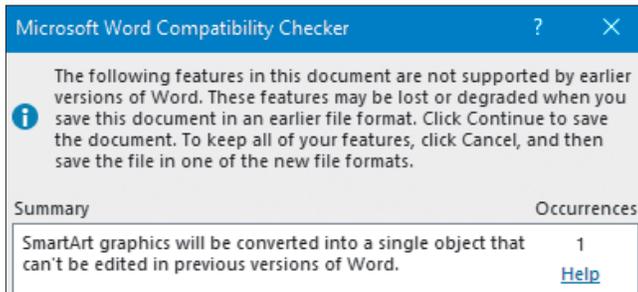
9. **Close** the Type Your Text Here pane.
10. Save the document.

Preparing Backward-Compatible Documents

If you know you'll be working with people who have older versions of Word, and if it's important that all features are compatible among the versions, you might start your new document by saving it as a Word 97–2003 document. This way you avoid using features unavailable in older versions.

The Compatibility Checker

If you save a Word 2019 document to an older Word version, the **Compatibility Checker** notifies you if the document contains features unique to newer versions of Word. You can also manually run the Compatibility Checker before saving the document in older versions.



The Compatibility Checker alerts you to how Word 2019 features will be handled if you save a document to an earlier version of Word.

☰ File→Info→Check for Issues→Check Compatibility

Round-Tripping Documents

You may hear the term **round-tripping** as you work with documents created in various versions of Word. Round-tripping refers to the practice of converting a document to a different format and then saving it back to the original format. For example, you may open a Word *.doc* file, convert it to a *.docx* file, and then decide to save your changes back to a *.doc* format. Round-tripping can create issues that corrupt the document so that it acts strangely or is damaged beyond repair.

Warning!

Avoid round-tripping to prevent unwanted loss of time and data.

The Accessibility Checker

The **Accessibility Checker** checks elements of the document that people with disabilities may find difficult to read and informs you of the issues so you can fix them. The checker issues errors, warnings, and tips:

- ▶ **Errors:** Elements of the document may be very difficult or impossible to understand.
- ▶ **Warnings:** Elements of the document may be difficult to understand.
- ▶ **Tips:** Elements of the document may be better organized for understandability.

Clicking an item in one of these categories will provide information on changing the content to make it more accessible. There is also a link to Help text that describes in detail what you can do to make documents more accessible.

☰ File→Info→Check for Issues→Check Accessibility

DEVELOP YOUR SKILLS: W10-D3

In this exercise, you will begin the process to save a Word 2019 document to a Word 97–2003 format version for people who have not yet upgraded. Then you will check for accessibility issues.

1. Choose **File**→**Save As** and navigate to your **Word Chapter 10** folder.
2. Click the **Save as Type** menu button ▼, choose **Word 97–2003 Document**, and click **Save**.
Word displays the Microsoft Word Compatibility Checker with a message indicating that you will not be able to edit the SmartArt graphic, so you've decided not to complete the conversion.
3. Click **Cancel**.
4. Choose **File**→**Info**→**Check for Issues**→**Check Accessibility** to open the Accessibility Checker task pane.
Notice the two categories: Errors and Warnings. There are no tips for this document.
5. Click the **Read More About Making Documents Accessible** link at the bottom of the task pane to display the Help window.
6. View the Help window content and then close the Help window and the task pane.

Document Properties and the Document Inspector

Valuable information about a document appears in the Properties panel in Backstage view. Among the data Word stores within a document are the author's name, dates for file creation and editing, and the file storage location. Sending this data along with a document can inadvertently reveal to recipients some data that you would rather protect.

If you intend to share a document with colleagues or clients, you may use the Document Inspector to ensure that it contains no hidden or personal information either in the document itself or in the **document properties**. For example, a document could contain comments and tracked changes that are hidden from view. Document properties could contain information such as the author's name and the company name.

The Document Inspector will display a list of issues found in a document. The only option for removing data for a category is to remove all data within that category. Sometimes you may want to manually review information before deciding which data to remove.

Tip!

To help prevent unwanted data loss, before using **Remove All** for a category, make a copy of the document, run the Document Inspector on the copy, and remove all issues to see the effect.

☰ File→Info→Properties

☰ File→Info→Check for Issues→Inspect Document

DEVELOP YOUR SKILLS: W10-D4

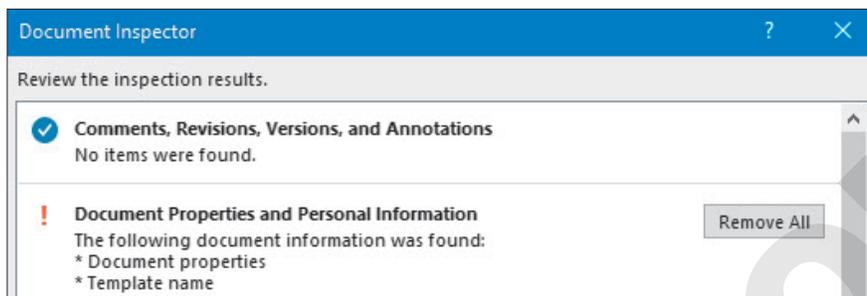
In this exercise, you will view document properties and run the Document Inspector. You will remove all personal data from the document.

1. Save your file as: **W10-D4-2003ProcManRevised**
2. Choose **File**→**Info** and review the properties information in the panel on the right.
Notice that names appear in the Related People area. You can remove the author's name if desired.

3. Right-click the author's name and choose **Remove Person**.
4. In the Info window, click **Check for Issues** and choose **Inspect Document**.
5. If prompted to save changes, click **Yes**.

The Document Inspector dialog box opens. You can remove the checkmark from any items you don't want inspected. In this example, you will leave all checkboxes checked except Ink.

6. Click **Inspect** at the bottom of the dialog box and review the results.



The inspector found document properties.

7. Click **Remove All** next to Document Properties and Personal Information and then click **Close**.
If your Document Inspector finds other issues as well, ignore them.
8. Choose **File**→**Info** and notice that, in the Properties panel, all names associated with the document have been removed.
9. Click **Back**  and save the file.

Controlling Document Access

When you share documents with colleagues and clients, it can be helpful to control the changes they can make. Several features assist you with protecting documents. For example, you can restrict the kinds of formatting and editing changes a reviewer can make. You can add a password to a document, and you can mark a document as final, thereby discouraging changes to it.

Restrict Editing

The Restrict Editing feature enables you to limit editing changes that reviewers can make. You also have the option to further limit access with a password:

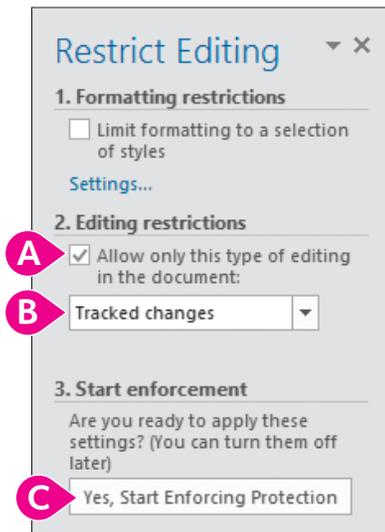
- ▶ **Restrict for Tracked Changes:** This setting protects a document from having Track Changes disabled. Every change to the document will be noted. In addition, no one can accept or reject changes while the document is protected.
- ▶ **Restrict for Comments:** This setting permits reviewers to insert and edit comments in the document but not to edit the document itself.
- ▶ **Restrict for Filling in Forms:** This setting permits users to insert data only in unrestricted areas of a form.

 File→Info→Protect Document→Restrict Editing

DEVELOP YOUR SKILLS: W10-D5

In this exercise, you will set editing restrictions to allow tracked changes, thus preventing reviewers from disabling the feature.

1. Save the file as: **W10-D5-2003ProcManRevised**
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to turn on document protection for Tracked Changes:



- A Ensure this **checkbox** is checked.
- B Ensure **Tracked Changes** is chosen here.
- C Click **Yes, Start Enforcing Protection**.

Word displays the *Start Enforcing Protection* dialog box. At this point, you can either click **OK** to restrict editing without a password or enter the desired password.

4. Click **OK** to dismiss the password dialog box.
5. On page 2, delete **of Services** in the *Scope of Services* heading.
The change is marked with *Track Changes*. No one can alter the document without changes being tracked.
6. Click **Stop Protection** at the bottom of the Restrict Editing task pane.
7. Click **Close**  in the upper-right corner of the Restrict Editing task pane.
8. Choose **Review**→**Changes**→**Next**  and click **Accept** .
9. Click **OK** when the message appears.
10. Save the file.

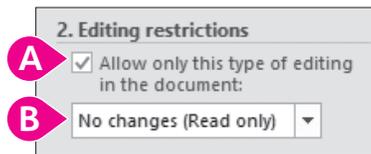
Allow Changes to Part of a Document

If you choose **No Changes (Read Only)** in the **Editing Restrictions** list, the **Exceptions** option appears. This option lets you specify certain areas of the document that a person can edit freely. For example, if a document is in its final version except for one section, you can exempt the incomplete section so it can be edited. You can also choose the people you want to allow to edit.

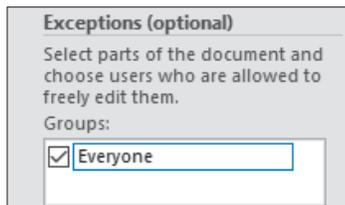
DEVELOP YOUR SKILLS: W10-D6

In this exercise, you will specify the document as read-only; however, you will apply an exception to three paragraphs so reviewers can make changes to them.

1. Save your file as: **W10-D6-2003ProcManRevised**
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to restrict editing:



- A Make sure a checkmark appears here.
- B Set the restriction level to **No Changes (Read Only)**.
4. Scroll to page 3 and select the three paragraphs below the *Entry into Services* heading.
5. Place a checkmark in the **Everyone** checkbox under Exceptions (Optional).



This specifies that all reviewers will be able to edit these paragraphs.

6. Click **Yes, Start Enforcing Protection** at the bottom of the task pane.
7. Click **OK** to bypass setting a password.
8. Click to deselect the paragraphs.

The editable paragraphs are shaded to make them easily visible to reviewers.

Attempt to Edit in a Restricted Area

9. Select a word anywhere there is no shading and tap **Delete**.
- Nothing happens because you are restricted to editing only the shaded paragraphs.
10. Delete the third paragraph in the shaded area.
- The deletion is allowed because it's in the area that was specified as an exception.
11. Click **Stop Protection** at the bottom of the task pane.
12. Select the two remaining shaded paragraphs and then remove the checkmark from the **Everyone** checkbox in the task pane.
13. Click in the document and notice the shading has been removed.
14. Save the file.

Restrict Formatting

When you share a document with multiple reviewers, it's easy to imagine a jumble of formats if there are no restrictions. You can restrict reviewers to applying only the Word styles you choose. Formatting is restricted to a list of specified styles, thus providing formatting consistency and preventing anyone from indiscriminately formatting the document.

DEVELOP YOUR SKILLS: W10-D7

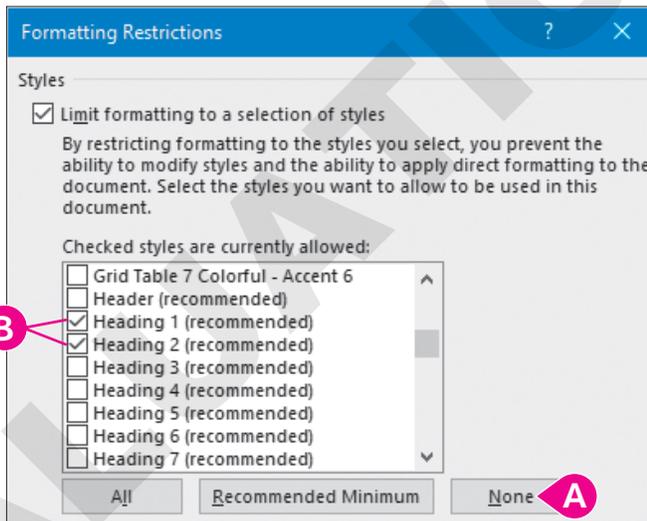
In this exercise, you will use the Restrict Editing task pane to apply formatting restrictions.

1. Save your file as: **W10-D7-2003ProcManRevised**
2. Choose **File**→**Info**→**Protect Document**→**Restrict Editing**.
3. Follow these steps to open the Formatting Restrictions dialog box:



- A Place a checkmark here.
- B Click the **Settings** link.

4. Follow these steps to set specific restrictions:



- A Click **None** to uncheck all the checkboxes at once.
- B Scroll down and place checkmarks in the **Heading 1** and **Heading 2** checkboxes.

The only formatting change a reviewer can make is to add Heading 1 or Heading 2 formatting.

5. Click **OK**; when Word displays a message asking if you want to remove other styles, click **No**.

Removing other styles from the document would reformat the entire document, possibly with unexpected results.

6. In section 2 of the Restrict Editing task pane, remove the checkmark next to **Allow only this type of editing in the document**.

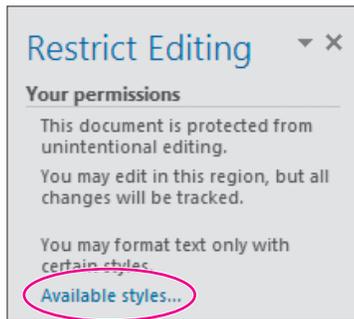
If a dialog box appears asking if you want to remove the ignored exceptions, click No.

- Click **Yes, Start Enforcing Protection** in the Restrict Editing task pane.

In this example, you will not add a password.

- Click **OK** to dismiss the password dialog box.

Notice that the task pane now contains a link to Available Styles.



- Click the **Available Styles** link to display the Styles task pane.
In addition to the Normal style, the only styles available are Heading 1 and Heading 2.
- Scroll to the top of page 2 and apply the **Heading 1** style to **Our Mission**.
- Close the Styles task pane and then display the **Home** tab.
All the Font and Paragraph formats are grayed out in the Ribbon because formatting is restricted to two heading styles.
- Click **Stop Protection** at the bottom of the Restrict Editing task pane and then close the task pane.
The Font and Paragraph formats are restored on the Ribbon.
- Save the file.

Passwords and Encryption

Using commands on the Backstage view Info screen, you can set an additional password that is required to open the document. If you use both passwords, the reviewer would need one password to open the document and another password to edit it.

Adding a document password also encrypts the document. **Encryption** means Word uses a code or mathematical algorithm to alter information so it is inaccessible to unauthorized readers. When you encrypt a document, Word prompts you for a password.

Note!

Passwords are case-sensitive.

☰ File→Info→Protect Document→Encrypt with Password

DEVELOP YOUR SKILLS: W10-D8

In this exercise, you will set a document password and then remove it.

- Choose **File→Info→Protect Document→Encrypt with Password**.
- Type **pass** in the Encrypt Document dialog box and click **OK**.

3. Type **pass** in the Confirm Password dialog box and click **OK**.

Notice that the security setting is displayed in the Info screen.



4. Click **Back**  and then save and close the document.

If you receive a message asking whether you would like to increase security on your computer, click No. Now you'll open the document with a password.

5. Choose **File**→**Open** and click **W10-D7-2003ProcManRevised** at the top of the Recent Document list.

In some classrooms, the Recent Documents list may be cleared upon rebooting the computer. If so, navigate to your Word Chapter 10 folder to open the document.

6. Type **pass** in the password box and click **OK**.

Now you will remove the password.

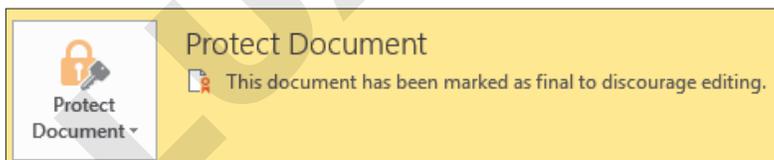
7. Choose **File**→**Info**→**Protect Document**→**Encrypt with Password**.

8. Select the characters in the password field, tap **Delete**, and then click **OK**.

9. Click **Back**  and then save the file.

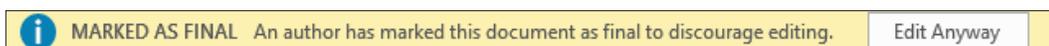
Marking a Document as Final

Another way to control edits and access to content is to mark the document as final. Using the **Mark as Final** command makes a document read-only. As a result, readers and reviewers will know that this document appears as it did when it went to a client, was filed electronically, or was in some other way beyond the point where edits would be useful. Marking as final also prevents accidental altering of the document. When a document is marked as final, the following message appears in the Info tab in Backstage view:



Editing Documents Marked as Final

When the Marked as Final feature is turned on, a yellow bar appears at the top of the document. The message in the bar lets you know that the document has been marked as final to discourage editing, and the Ribbon is hidden. Note that the feature only *discourages* editing. It is not as secure as a password would be. The button in the message bar enables you to edit the document anyway.



 File→Info→Protect Document→Mark as Final

DEVELOP YOUR SKILLS: W10-D9

In this exercise, you will mark a document as final and then remove the designation to re-enable editing.

1. Choose **File**→**Info**→**Protect Document**→**Mark as Final**.
2. When Word displays a message that the document will be marked as final and saved, click **OK**.
Word displays additional information about this setting.
3. Take a moment to read the information and then click **OK**.
The security setting is displayed on the Info screen.
4. Click **Back**  to return to the document.
Notice the Marked as Final bar at the top of the screen.
5. Select the heading **Our Mission** on page 2.
6. Tap **Delete** and see that the text is not deleted.
7. Choose **File**→**Info**→**Protect Document**→**Mark as Final** to turn off the feature.
8. Click **Back**  and notice that the Marked as Final bar at the top of the screen has disappeared.
9. Save the file.

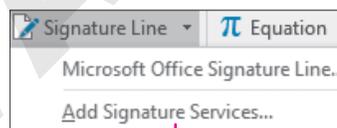
Attaching Digital Signatures

With the ability to rapidly transmit documents globally, security concerns arise. How can a client know for certain that a critical document originated in your office? A **digital signature** is a secure means of stamping a document as authentic and originating from you. Other people cannot modify a signed document without causing the digital signature to be removed or the document to be marked as invalid.

You may use a digital signature when passing documents to others as an email attachment, as a downloadable file on your organization's intranet, from a website, or on a flash drive. You add a digital signature to a file by first attaching a digital certificate.

Digital Certificates

You may obtain digital certificates from third-party vendors who check identification before issuing a certificate. If you post documents on an intranet or the Internet, your network administrator will usually provide you with an authentic digital certificate.



This option on the Signature Line menu links to a Microsoft website, where you can choose a third-party vendor.

You may also create your own digital certificate, although its use is limited. Self-made certificates are not verified by any outside agency; therefore, they're not necessarily a reliable measure, but they are the most convenient.

DEVELOP YOUR SKILLS: W10-D10

In this exercise, you will create a temporary digital certificate on your local computer. You will start by locating the SELFCERT application on your computer, which is installed as part of the Microsoft Office 2019 package.

1. Open **File Explorer**  and navigate to the **SELFCERT** application through a path such as C:\Program Files (x86)\Microsoft Office\root\Office16.

Note!

This will be the correct file path for most computers. If yours is an exception, ask for assistance. And note you may not have user permission to create digital certificates on computers that are for general use by multiple people.



2. Scroll to locate the SELFCERT application.
3. Double-click the file. When the Create Digital Certification dialog box opens, type **James Elliott** in the Your Certificate's Name field.



4. Click **OK**; when a message appears indicating that a certificate was successfully created for James Elliott, click **OK** again.

You have now created a digital certificate that can be used to apply a digital signature to your files.

5. Close the File Explorer window and then save the file.

Digital Signatures

There are two ways to add a digital signature to a document:

- ▶ You can add a visible signature line to a document and then capture the digital signature when the document is signed.
- ▶ If a visible signature line is not necessary, you can add an invisible digital signature. A signature button appears on the status bar at the bottom of the screen, so the recipient can verify that the document has a digital signature.

 Insert→Text→Signature Line

DEVELOP YOUR SKILLS: W10-D11

In this exercise, you will add a signature line to a document and add a digital signature. You will then attempt to modify the signed document. Finally, you will remove the visible signature and add an invisible digital signature.

1. Save your file as: **W10-D11-2003ProcManRevised**
2. Press **Ctrl+End** to move to the end of the document and then tap **Enter** twice.
3. Choose **Insert→Text→Signature Line**  to display the Signature Setup dialog box.

4. Complete the information as shown:

The Instructions to the Signer text is provided by default. You can modify it if necessary. In this exercise, you'll leave the text as is.

5. Click **OK** to complete the signature setup.
 A signature line appears with the signer's name and title below. Now you'll sign the document.
6. Right-click the signature line and choose **Sign**.
7. Follow these steps to sign the document:

- A** Type **James Elliott** here.
- B** If the Signing As name isn't James Elliott, click **Change**, choose **James Elliott**, and click **OK**. Click **Yes** when the message appears to use the certificate.
- C** Click **Sign**.

If you didn't change the Signing As name, a message appears indicating the certificate cannot be verified and asking whether you want to use this certificate. Remember, a self-created certificate is not verified by a third-party agency.

8. If necessary, click **Yes** to use the certificate.

9. When a message appears indicating your signature has been saved, click **OK**.

A yellow bar at the top of the document indicates the document is marked as final. The Recoverable Signature note above the signature is notifying you that the signature is not verified by an outside agency. A signature button appears on the status bar indicating a digital signature in the document.



10. Attempt to delete a word in the paragraph above the signature line.

A message briefly appears on the status bar indicating that you can't make a change because the selection is locked.

Now you will remove the signature so you can add an invisible signature. Remember, you can use an invisible signature when a visible signature is not required; however, a signature button will still appear on the status bar.

11. Click the **Signature** button on the status bar to display the Signatures task pane.

You may notice the term Recoverable Error at the top of the task pane. This is because you are using a self-created certificate.

12. Right-click the **James Elliott** signature in the task pane and choose **Remove Signature**.

A message appears, asking you to verify that you want to remove the signature.

13. Click **Yes** to remove the signature.

14. When a message appears indicating the signature was removed, click **OK**.

Remove the Signature Line and Add an Invisible Digital Signature

15. Select the signature line and tap **Delete** to remove it.

16. Close the Signatures task pane.

Now you will add an invisible signature, which you do in Backstage view.

17. Choose **File**→**Info**→**Protect Document**→**Add a Digital Signature**.

18. Follow these steps to add the signature:

- A** Choose **Created and Approved This Document**.

- B** Type **Raritan Procedure Manual** here.

- C** Click **Sign**.

A message appears indicating the certificate cannot be verified. Again, a self-created certificate is not verified by a third-party agency.

19. Click **Yes** to use the certificate.

20. When a message appears indicating the signature has been saved with the document, click **OK**.

Notice the Marked as Final note in the yellow bar at the top of the screen and the signature button on the status bar.

Because you cannot edit a document after a signature has been attached, there is no option to save the document. When you close the document, the signature will still be attached.

21. Close the file and exit Word.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

EVALUATION ONLY

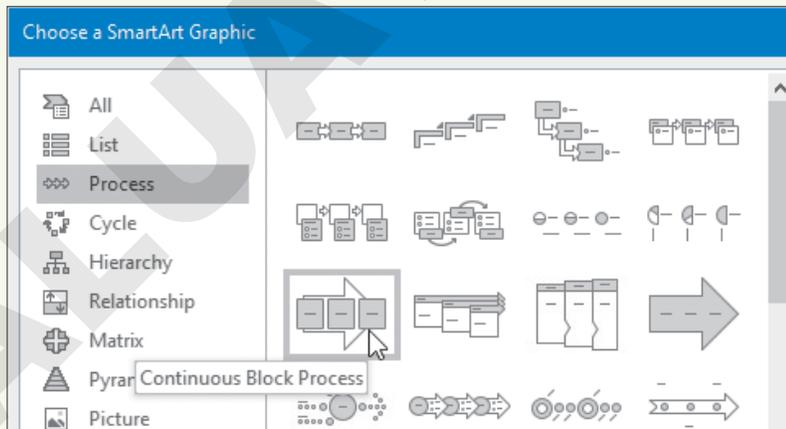
Reinforce Your Skills

REINFORCE YOUR SKILLS: W10-R1

Plan for Trout in the Classroom

Kids for Change hopes to get involved in the “Trout in the Classroom” project, in which kids raise fish from eggs until they’re ready to be released in streams. A team member created a research report in Word 2003, but the rest of the team is using Word 2019. In this exercise, you will convert an older document to Word 2019 format and work with backward compatibility, document properties, and the Document Inspector.

1. Open **W10-R1-Trout** from your **Word Chapter 10** folder and save it as: **W10-R1-TroutRevised**
Notice Compatibility Mode in the title bar. Now you will attempt to add a SmartArt graphic to the document.
2. Press **Ctrl+End** to position the insertion point at the end of the document and choose **Insert→Illustrations→SmartArt** .
The Word 2003 Diagram Gallery opens because a Word 2003 document is not compatible with the SmartArt feature.
3. Click **Cancel** to close the Diagram Gallery.
Now you will convert the document to the Word 2019 format.
4. Choose **File→Info→Convert** and click **OK** when the conversion message appears.
Notice that [Compatibility Mode] no longer appears in the title bar; the document is now in Word 2019 format. Now you will insert a SmartArt graphic.
5. Choose **Insert→Illustrations→SmartArt** .
6. Choose the **Process** category on the left, choose **Continuous Block Process**, and click **OK**.



7. Click the tab to the left of the graphic and type the following in the Type Your Text Here pane; close the text pane when you’re finished:
 - First bullet: **Hatch**
 - Second bullet: **Release**
8. Click the third text box in the graphic to select it and tap **Delete**.
9. Position the mouse pointer on the graphic’s upper-right corner sizing handle and drag down diagonally toward the center of the image until it’s about half its original size.

Prepare a Backward-Compatible Document

You want to make sure that the originator of the file will have access to it. You will format a Word 2019 document to be compatible with earlier versions.

10. Choose **File**→**Save As** and navigate to your **Word Chapter 10** folder.
11. Click the **Save As Type menu** button ▼, choose **Word 97-2003 Document (*.doc)**, and click **Save**.

The Microsoft Word Compatibility Checker opens, indicating that SmartArt graphics are not supported in earlier versions of Word. You will cancel the conversion so the SmartArt graphic will work as intended.

12. Click **Cancel**.

Inspect the Document

13. Choose **File**→**Info** and observe the Properties panel on the right.
Names appear in the Related People area.
14. In the Info screen, choose **Check for Issues**→**Inspect Document**.
A message appears indicating that you should save your changes because the Document Inspector may remove data that can't be restored.
15. Click **Yes** to save the file and open the Document Inspector.
In this example, you will leave all checkboxes checked.
16. Click **Inspect**.
The inspector found properties and personal information, which you will remove.
17. Click the **Remove All** button next to Document Properties and Personal Information and then close the dialog box.
If the Document Inspector found other issues as well, ignore them.
18. Choose **File**→**Info** and notice that the names were removed from the Related People area in the Properties panel.
19. Click **Back** to return to the document.
20. Save and close the file.

REINFORCE YOUR SKILLS: W10-R2

Help in a Backyard Bee-Counting Project

The bee population has declined, and Kids for Change plans to help gather data by taking part in a bee-counting project. One of the members has researched methodologies for doing this. The research will be the basis of discussion for the next monthly meeting. In this exercise, you will use document protection features to prevent the document from being modified accidentally.

1. Open **W10-R2-Bees** from your **Word Chapter 10** folder and save it as:
W10-R2-BeesRevised
2. Chose **File**→**Info**→**Protect Document**→**Restrict Editing** and place a checkmark in the checkbox below the Editing Restrictions heading in the task pane.

3. Choose **Tracked Changes** from the drop-down list and then click **Yes, Start Enforcing Protection**.
4. When the dialog box opens, enter **pass** in both password fields and click **OK**.
5. Select **method** in the first line of the first paragraph below the *Counting the Vanishings Bees* heading and type **technique** in its place.
The changes are marked because no one can modify the document without changes being tracked.
6. Click **Stop Protection**; when the Unprotect Document box appears, type **pass** in the Password field and click **OK**.
Now you will accept the changes you made.
7. Choose **Review**→**Changes**→**Next** .
8. Accept both changes and click **OK** when the message appears.

Apply Editing Restrictions

Now you will apply editing exceptions and specify only certain parts of the document that can be edited. You will, however, allow reviewers to add comments anywhere in the document.

9. Choose **Comments** from the drop-down list in the Editing Restrictions section of the task pane.
10. Select the first three paragraphs in the main article and then place a checkmark in the **Everyone** checkbox below the Exceptions (optional) heading in the task pane.
11. Click **Yes, Start Enforcing Protection** and then click **OK** to close the dialog box without setting a password.
12. Deselect the paragraphs and notice the unprotected area is shaded, making it easy for reviewers to locate.
13. Select any word outside the shaded section and attempt to delete it.
The deletion doesn't work because only the shaded area can be edited.
14. In the first line of the third shaded paragraph, select **decline in** and replace it with: **waning**
The change is allowed because it's in the area specified as an exception. Now you will add a comment, as comments were specifically permitted in the Restrict Editing task pane.
15. In the fifth paragraph of the article, select **\$200 billion**.
16. Choose **Review**→**Comments**→**New Comment** 
Comments are allowed, not only in the exceptions area, but anywhere in the document.
17. Type this text: **Can anyone verify this dollar amount?**
18. Click **Stop Protection**.
19. Select the shaded paragraphs, remove the checkmark from the **Everyone** checkbox in the task pane, and then close the task pane.
20. Right-click the comment in the markup area and choose **Delete Comment**.

Set a Document Password and Mark a Document as Final

21. Choose **File**→**Info**→**Protect Document**→**Encrypt with Password**.
22. Type **pass** in the Encrypt Document dialog box and click **OK**.

23. Type **pass** in the Confirm Password dialog box, click **OK**, and then save and close the document.
24. Choose **File**→**Open** and click **W10-R2-BeesRevised** at the top of the Recent Documents list.
25. Type **pass** in the password box and click **OK**.
26. In the Backstage Info screen, choose **Protect Document** again and choose **Mark as Final**; when the message appears, click **OK**.
27. When additional information about this setting appears, click **OK**.
28. Click **Back** to return to the document.
Notice the Marked as Final bar at the top of the screen.
29. Select the first paragraph in the main article and tap **Delete**.
The text is not deleted because the document is marked as final.
30. Choose **File**→**Info**→**Protect Document**→**Mark as Final** to turn off the feature.
31. Click **Back** to return to the document.
The Marked as Final bar at the top of the document has disappeared.

Create a Digital Certificate and Add a Digital Signature

Now you will generate a self-created digital certificate so you can apply a digital signature to your document. Remember, a self-created certificate is not verified by an outside agency.

32. Open File Explorer  and navigate to the SELFCERT application through a path such as C:\Program Files (x86)\Microsoft Office\root\Office16.

Note!

Seek assistance as necessary to determine the path on your computer. And remember that you may not have permission to create a digital certificate on computers for general use by multiple people.



33. Scroll to locate the SELFCERT application.
34. Double-click the file; when the Create Digital Certification dialog box opens, type **Charles Eng** in Your Certificate's Name field and click **OK**.
35. When the message appears indicating the certificate was successfully created, click **OK** and then close the File Explorer window.
36. Position the insertion point at the end of the document and choose **Insert**→**Text**→**Signature Line** .
37. Follow these guidelines to complete the information in the dialog box:
 - Suggested Signer: **Charles Eng**
 - Suggested Signer's Title: **Project Manager**
 - Suggested Signer's E-mail Address: **CharlesEng@Kids.com**.
 - Click **OK** to complete the setup.
38. Right-click the signature line and choose **Sign**; type **Charles Eng** next to the X in the Sign dialog box.

39. If the Signing As name at the bottom of the dialog box is not Charles Eng, follow these steps:
 - Click the **Change** button, choose **Charles Eng**, and click **OK** to close the dialog box.
A message appears indicating the certificate cannot be verified because a self-created certificate is not verified by an outside agency.
 - Click **Yes** to use the certificate.
40. Click the **Sign** button to close the Sign dialog box; click **Yes** to acknowledge that the certificate cannot be verified.
41. Click **OK** when the next message appears.
42. Attempt to delete a word in the document.
The deletion does not work because you cannot edit a signed document.
43. Close the document.

REINFORCE YOUR SKILLS: W10-R3

Learn About 4-H

Kids for Change is thinking about partnering with the 4-H organization on a project. One of the members has researched the organization, and the research document will be the basis for discussion in the next monthly meeting. In this exercise, you will prepare a document for sharing by considering compatibility issues and controlling access to the document. Finally, you will apply a digital signature to the document.

1. Open **W10-R3-4H** from your **Word Chapter 10** folder and save it as: **W10-R3-4HRevised**
Notice Compatibility Mode in the title bar. Next you will convert this Word 2003 document to a Word 2019 document.
2. Choose **File**→**Info**→**Convert**.
3. In the message box indicating the conversion may cause changes, click **OK**.
Compatibility Mode no longer appears in the title bar. Now you will work with the Document Inspector.
4. Choose **File**→**Info** and notice that names appear in the Related People area of the Properties panel.
5. In the Info screen, choose **Check for Issues**→**Inspect Document**.
6. When the message to save changes appears, click **Yes**.
7. When the Document Inspector opens, leave all checkboxes checked and then click **Inspect** and review the results.
The inspector found properties and personal information in the document.
8. Click the Document Properties and Personal Information **Remove All** button and then close the Document Inspector.
9. Choose **File**→**Info** and notice that the names have been removed in the Related People area of the Properties pane.

Restrict Editing and Apply Editing Exceptions

10. In the Backstage Info screen, choose **Protect Document**→**Restrict Editing**.
11. If necessary, click the checkbox below the Editing Restrictions heading in the task pane and choose **Tracked Changes** from the drop-down list.
12. Click **Yes, Start Enforcing Protection** and then click **OK** to close the dialog box without setting a password.
13. In the first paragraph below the *About 4-H* heading, position the insertion point in front of *universities* and type: **colleges and** Spacebar
The changes are marked with Tracked Changes because that was chosen in the Restrict Editing task pane.
14. Click **Stop Protection** and then right-click the change and choose **Accept Insertion**.
15. Choose **No Changes (Read Only)** from the drop-down list in the Editing Restrictions section of the task pane.
16. Select the three paragraphs below the *Cooperative Extension System* heading on page 1 and then check the **Everyone** checkbox in the task pane.
17. Click **Yes, Start Enforcing Protection** and click **OK** to bypass setting a password.
18. Click in the document to deselect the text and notice that the exceptions text is shaded.
19. If necessary, display formatting marks; position the insertion point next to the paragraph symbol at the end of the third line in the second paragraph.
20. Tap Delete twice to combine the paragraphs and then tap Spacebar.
21. Click **Stop Protection**, select the shaded paragraphs, and then remove the checkmark from the **Everyone** checkbox.
22. Close the Restrict Editing task pane.

Mark the Document as Final

23. Choose **File**→**Info**→**Protect Document**→**Mark as Final**.
24. When a message appears indicating that the document will be marked as final and saved, click **OK**.
25. In the message box with additional information about this setting, click **OK**.
26. Click **Back** to return to the document and notice the Marked as Final bar at the top of the screen.
27. Close the document.



Apply Your Skills

APPLY YOUR SKILLS: W10-A1

Plan a Tour of Mexico City

Universal Corporate Events is planning a tour of Mexico City for a client. The initial research is complete, and now it's time for colleagues to review the article. In this exercise, you will work with compatibility issues, convert a document to different formats, and work with document properties and the Document Inspector.

1. Open **W10-A1-MexCity** from your **Word Chapter 10** folder and save it as: **W10-A1-MexCityRevised**
2. Position the insertion point at the end of the document.
3. Attempt to insert a SmartArt graphic and then use the Convert command in Backstage view to convert the document to Word 2019 format.
4. Open the SmartArt Graphic dialog box and then choose the **List** category and the **Vertical Box List** (second graphic, second row).
5. Open the Type Your Text Here pane and add this text at the bullet points:
 - **History**
 - **Economy**
 - **Climate**

6. Close the text pane and then resize the graphic to about half its original size.
7. Use the **Save As** command and navigate to your **Word Chapter 10** folder.
8. Choose **Word 97-2003 Document** from the Save as Type list and click **Save**.

When the Compatibility Checker opens, notice that the SmartArt graphic will be converted into an object that can't be edited. You may want to edit the object in the future, so you will prevent the conversion.

9. Click **Cancel**.

Next, you will work with document properties and the Document Inspector.
10. Go to Backstage view and notice the names in the Related People area in the Properties panel.
11. Use the Document Inspector to inspect all categories listed in the dialog box.
12. Remove all document properties and personal information, and then close the dialog box.
13. Go to Backstage view and notice that no names appear in the Related People area of the Properties panel.
14. Save and close the file.

APPLY YOUR SKILLS: W10-A2

Organize a San Francisco Tour

Universal Corporate Events is adding San Francisco to its West Coast tour options. A Universal Corporate Events rep has done some research, and now some other reps who are familiar with San Francisco will review the document. In this exercise, you will use features for securing the document so accidental changes are not made.

1. Open **W10-A2-SanFran** from your **Word Chapter 10** folder and save it as: **W10-A2-SanFranRevised**
2. Open the Restrict Editing task pane and restrict editing to Tracked Changes.
3. Enforce protection, using **pass** as the password.
Notice the message in the task pane indicating that all changes will be tracked.
4. Make these edits:
 - In the fourth line of the first paragraph of the main article, delete **road**.
 - Replace *Within* at the beginning of the second paragraph with: **In**
 - In the second line of the same paragraph, delete the comment in parentheses.
5. Stop protection, enter your password, and accept the changes you made.
Now you will use formatting restrictions.
6. Apply formatting restrictions that limit formatting to the use of the Heading 1 style; do not allow other styles to be removed.
7. Start enforcing protection and bypass using a password.
8. Display the available styles and apply the Heading 1 style to the *Landmarks* and *Neighborhoods* headings.
9. Stop protection and then accept the formatting changes.
Now you will apply an editing exception.
10. Restrict editing to Comments and then select the **Chinatown** paragraph (starts at the bottom of page 1).
11. Check the **Everyone** checkbox to make the paragraph editable by all reviewers.
12. Start enforcing protection and bypass adding a password.
13. Make these edits:
 - In the first sentence of the *Chinatown* paragraph, delete the phrase **part tourist trap, part**.
 - Select the **Landmarks** heading on page 1 and add this comment: **A trip to Muir Woods to see giant redwoods is a great side trip.**
14. Stop protection, select the **Chinatown** paragraph, and remove the checkmark from the **Everyone** checkbox.

Create a Digital Certificate and Add a Signature

15. Open File Explorer and navigate to the SELFCERT application.
16. Double-click **SELFCERT** and then type **Ella Mae Chang** in the field at the bottom of the Create Digital Certificate dialog box.
17. Close the File Explorer window.

18. Position the insertion point at the end of the document and tap **Enter** twice.
19. Use the **Signature Line** command to open the Signature Setup dialog box.
20. Follow these guidelines to enter the information in the dialog box:

Signature Setting	Value
Suggested Signer	Ella Mae Chang
Suggested Signer's Title	Project Manager
Suggested Signer's E-mail Address	EllaMae@uce.com

21. Add **Ella Mae Chang** to the signature line.
Remember, you may need to change the Signing As name.
22. Attempt to delete a word in the document.
The deletion is not permitted because a signed document cannot be modified.
23. Delete the signature line in the document.
Now you will add an invisible signature.
24. Use the Info screen in Backstage view to add a digital signature.
25. In the Sign dialog box, choose **Created This Document** from the Commitment Type list.
26. In the Purpose for Signing This Document field, type: **San Francisco Itinerary**
27. Click **Yes** to use the certificate; when the message appears indicating the signature has been saved, click **OK**.
28. Close the file.

APPLY YOUR SKILLS: W10-A3

Prepare a Cape Town Itinerary

A Universal Corporate Events rep has conducted some research for a Cape Town travel itinerary. Now some colleagues will review the document. In this exercise, you will prepare the document for sharing. You will consider compatibility issues, apply editing restrictions and exceptions, and add a digital signature.

1. Open **W10-A3-CapeTown** from your **Word Chapter 10** folder and save it as: **W10-A3-CapeTownRevised**
2. Choose **Design**→**Document Formatting**→**Themes**.
This feature is not available in a Word 2003 document. Now you will convert the document to the Word 2019 format.
3. Use the **Convert** command to convert the document to the Word 2019 format.
4. Choose **Design**→**Document Formatting** and notice the Themes feature is now available.
Now you will apply editing and formatting restrictions and formatting exceptions.
5. Apply the Tracked Changes editing restrictions, but don't add a password.
6. Make these edits:
 - In the first line of the first paragraph in the main article, replace *neighborhood* with: **community**
 - At the end of the same line, replace *inhabited* with: **occupied**
7. Stop protection.

8. Apply formatting restrictions that limit formatting to the Heading 1 and Title styles; don't allow any other formatting styles in the document to be removed.
9. Enforce protection, but don't set a password.
10. Display the available styles and apply the Heading 1 style to the *What to See in Cape Town* heading.
11. Stop protection and accept the formatting change you made.
Now you will apply editing exceptions to specify an area of the document where reviewers can freely edit.
12. Restrict editing to Comments, select the **Kirstenbosch Botanical Gardens** paragraph at the bottom of page 1, and then check the **Everyone** checkbox.
13. Enforce protection and bypass setting a password.
14. In the fourth line of the editable paragraph, right-click **diverse**, choose **Synonyms**, and choose **varied**.
15. Select **Bo-Kaap** at the beginning of the article and add this comment: **I think we should definitely include this in the tour.**
16. Stop protection.
17. Select the exceptions paragraph, remove the checkmark from the **Everyone** checkbox, and then close the task pane.

Add a Digital Signature

18. Open File Explorer and navigate to the SELFCERT application.
19. Double-click **SELFCERT** and enter **Marty Zane** at the bottom of the Create Digital Certificate dialog box; close File Explorer.
20. Position the insertion point at the end of the document and set up the signature line with this information:

Signature Setting	Value
Suggested Signer	Marty Zane
Suggested Signer's Title	Project Manager
Suggested Signer's E-mail Address	MartyZane@uce.com

21. Sign the signature line by entering **Marty Zane** next to the X in the Sign dialog box.
22. If necessary, change the Signing As name.
23. Close the document and exit Word.



Project Grader

This chapter does not include Project Grader exercises. Project Grader content is based on the learning objectives for a chapter, and sometimes those learning objectives cannot be accurately graded by the system. Objectives from this chapter that can be accurately graded may be included in later chapters, if applicable.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W10-E1 That's the Way I See It

As the owner of a small business, you are considering adding a new product to your line. Decide on the type of business you are in and what the new product will be. Conduct online research of the new product.

Create a short introduction (three to five sentences) describing why you think the new product will enhance your line. Copy content of one to two pages about the product, citing your sources. Include at least two headings. Save the file in Word 97-2003 Document (*.doc) format as:

W10-E1-NewProd

Convert the file to the current format. Insert a SmartArt graphic from the List category and list three benefits of your new product. Restrict formatting to Heading 1 and Heading 2 styles and then apply heading styles to all of the headings. Restrict editing to Comments. Select one paragraph and make it exception text that all reviewers may freely edit. Add a comment to text that is not part of the exception text.

W10-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you are researching online marketing articles specifically targeted to the landscaping business. After researching several articles, decide which marketing approach you will use and write a short introduction (five to six sentences) describing the benefits of your chosen approach. Copy the article as the basis for your research document, citing your source. Save the document as: **W10-E2-Market**

Because you will be distributing this document to current and potential customers, you want to check it for personal information. Examine the document properties to determine whether your name is visible in the Properties panel. Use the Document Inspector to remove all personal information. Set a document password (**pass**). Finally, create a digital certificate in your name, and then apply a visible digital signature to the end of the document and sign it.

W10-E3 Demonstrate Proficiency

The owner of Stormy BBQ is considering expanding the business to include a BBQ food truck. Conduct online research regarding how to start a food truck business. Create a one- to two-page report, copying information from the Internet and citing your sources. Write a short introduction (four to five sentences) summarizing why you think a food truck is a good or bad addition to the business. Save the document as: **W10-E3-FoodTruck**

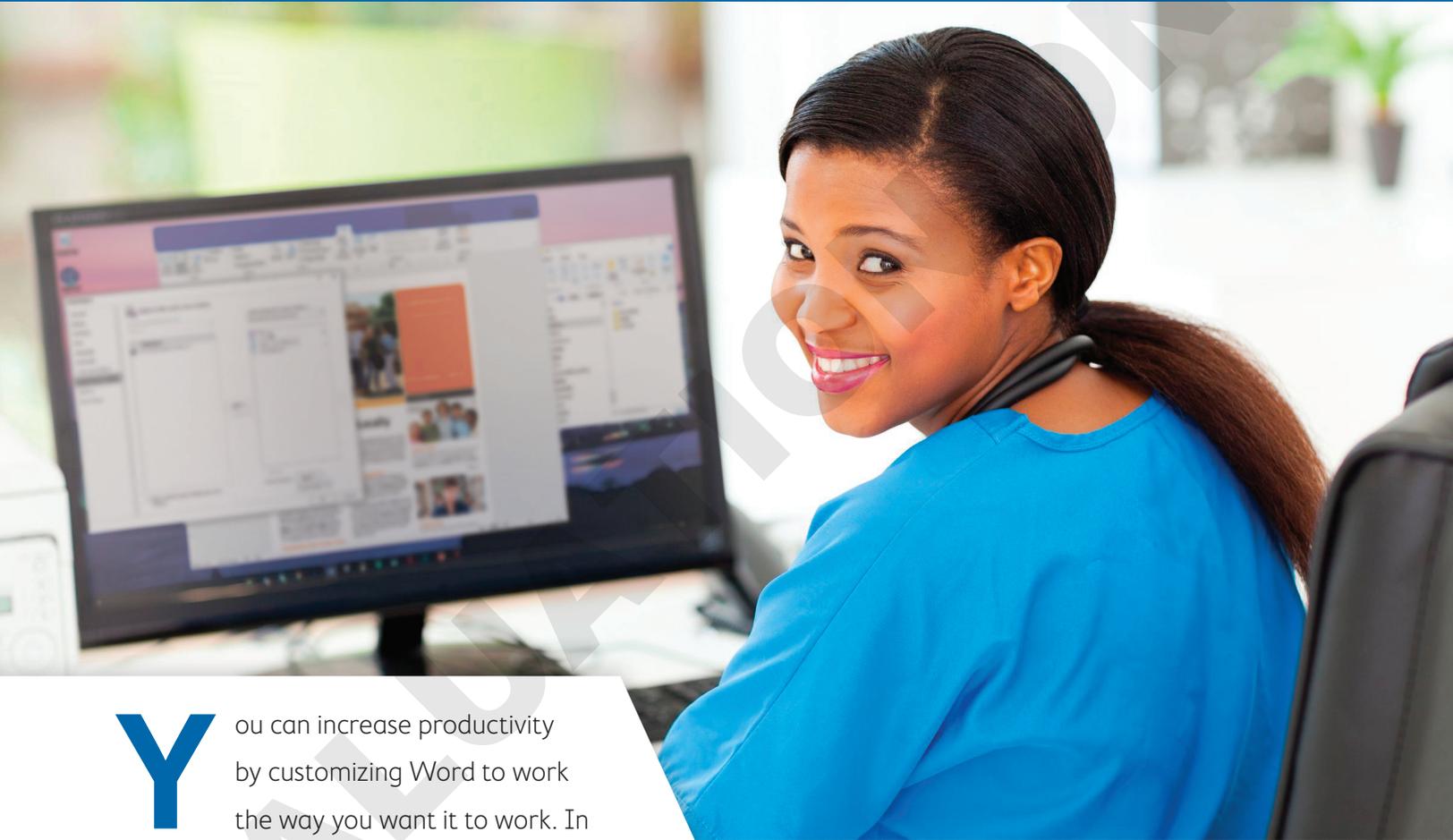
Because you will distribute this document for the Stormy BBQ marketing staff to review, you will prepare it for sharing. Examine your document's properties and use the Document Inspector to remove all personal information. Select a paragraph in the document and apply the exception that makes the paragraph available to all reviewers to edit. Apply editing restrictions, making it read-only. Enforce protection and assign the password (**pass**). Finally, create a digital certificate in your name and apply an invisible digital signature to the document.

EVALUATION ONLY

WORD

11

Personalizing Word



You can increase productivity by customizing Word to work the way you want it to work. In addition, you can use built-in accessibility features whenever the default methods are not serving your needs. In this chapter, you will work with Word options, AutoCorrect, and document properties to enhance the way you work. You will also work with translation and accessibility settings to make your documents easier to use for those who speak other languages or have disabilities.

LEARNING OBJECTIVES

- ▶ Customize Word options
- ▶ Use AutoCorrect to insert customized text
- ▶ Modify document properties
- ▶ Implement and use accessibility features
- ▶ Use language translation features

Project: Setting Up Word to Work the Way You Do

You have been working with Raritan Clinic East for several months. By examining the types of documents you have created during this time, you have some ideas for setting up Word to make it more efficient. You have learned that most documents are saved in folders in a specific location, and you want to set the default directory to access your main folder. You plan to pin documents you use all the time to the Recent Documents list so they're always at the top of the list, and you have discovered that document properties can be helpful in searching for files located in a large group of files. You've also identified ways to make Word easier to use for employees with disabilities. Finally, you've been informed that several employees speak other languages, so you decide to translate some of the company documents.

Setting Word Options

The Word Options dialog box includes many options for you to control the way Word acts. In the Proofing category, you can set up your own AutoCorrect terms to print. In the Save category, you can change the AutoRecover time interval and identify the default folder you want to use to store files. You can use the Advanced category to set the number of documents that appear in the Recent Documents list.

Note!

Word Options are program-level settings, meaning they're settings for Word as a program—they don't affect individual documents. It also means any changes you make in Word Options remain in place until you change them.

 File→Options

Customizing AutoCorrect

In addition to correcting errors, AutoCorrect lets you automatically insert customized text and special characters. It's also useful for replacing abbreviations with full phrases. For example, you could set up AutoCorrect to insert the name of your company whenever you type an abbreviation for it.

You can also delete built-in AutoCorrect entries that may interfere with your writing; however, this is not recommended when working on public or shared computers. If you use these program-level settings to improve your own productivity, you may inadvertently complicate that of others.



View the video “An Overview of the AutoCorrect Dialog Box.”

 File→Options→Proofing→AutoCorrect Options button

You can designate exceptions to AutoCorrect so it doesn't alter text as it normally would. For example, AutoCorrect assumes that a period indicates the end of a sentence and, therefore, capitalizes the first letter of the next word. But, in some cases, such as after abbreviations, you don't want the next word capitalized. The Exceptions feature lets you handle this easily.



View the video “AutoCorrect Exceptions.”

DEVELOP YOUR SKILLS: W11-D1

In this exercise, you will create a custom AutoCorrect entry. You type Raritan Clinic East over and over in your work, so it's an ideal candidate for an AutoCorrect shortcut.

1. Open **W11-D1-DraftProc** from your **Word Chapter 11** folder and save it as: **W11-D1-DraftProcRevised**
2. Choose **File**→**Options**, click the **Proofing** category in the left panel, and then click **AutoCorrect Options** to open the AutoCorrect dialog box.
3. Follow these steps to create an AutoCorrect shortcut:

Replace:	With:
rce	Raritan Clinic East
realyl	really
reccomend	recommend
reccommend	recommend
receieve	receive
recieve	receive
recieved	received

- A Type **rce** in the Replace field.
 - B Type **Raritan Clinic East** in the With field.
 - C Click **Add**.
4. Click **OK** twice.
5. Press **Ctrl**+**End** to move to the end of the document and then scroll to the top of the page.
6. In the first line of the first paragraph, position the insertion point in front of the word *share* and type: **at** **Spacebar** **rce** **Spacebar**
7. In the first line of the second paragraph, delete **the Clinic**, type **rce** **Spacebar**, and correct any spacing if necessary.
Now you will delete the AutoCorrect term so the next person who uses the computer will have the same experience.
8. Choose **File**→**Options**, click the **Proofing** category in the left panel, and then click **AutoCorrect Options**.
9. Type **rce** in the Replace field to scroll the list to that term.
10. Click **Delete** and then click **OK** twice.
11. Save the file.

Changing the AutoRecover Interval and Default File Location

If you're concerned about power failures or are working on an important document, you may wish to reduce the amount of time between automatic saves. Your documents are saved every ten minutes by default.

When Word and other Office programs are installed on a computer, default file locations are set up. The default save location is your OneDrive; however, you can change the default file location to a folder on your local computer. Doing so reduces the time it takes to navigate to that location. The new save location applies to new, unsaved documents. A document that was previously saved will default to the folder in which it was originally saved.

Note!

You may not have user permission to change the AutoRecover interval or the default file location on a public or shared computer. The settings changes made in this section are program level and permanent.

File→Options→Save→Save AutoRecover Information Every x Minutes

File→Options→Save→Default Local File Location

DEVELOP YOUR SKILLS: W11-D2

In this exercise, you will set the AutoRecover time interval to five minutes. Then you will change the default file location where files are saved.

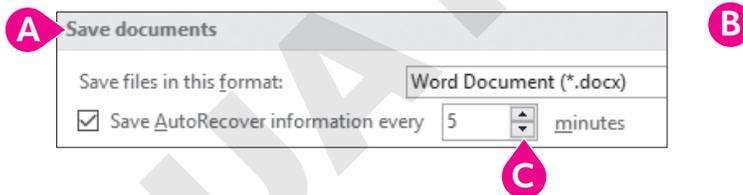
Before You Begin: Ask assistance as necessary to determine whether you have user permission to change the AutoRecover interval or default file location. If you do, verify the procedure for restoring the original AutoRecover interval and default file location. If you don't, read the steps to familiarize yourself with the process.

1. Choose **File→Options** and click the **Save** category on the left.

Note!

As you make changes, first make a note of the current settings so you can reset them to the original state later in this chapter.

2. Follow these steps to change the AutoRecover interval:



- A Locate the Save Documents section at the top of the dialog box.
- B Write down the current AutoRecover interval so you can reset it later.
- C Use the **spin box controls** to set the time to **5** minutes.

Your documents will now automatically save every five minutes.

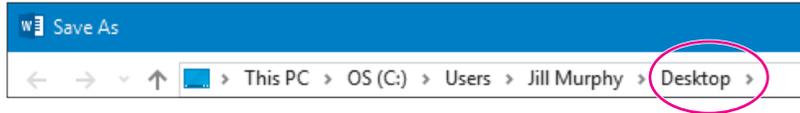
3. In the same section of the dialog box, check the **Save to Computer by default** checkbox.
4. To specify a particular folder, click **Browse** to the right of the Default Local File Location field.
5. In the Modify Location dialog box, scroll in the left column to and choose **Desktop** and then click **OK** twice.

The Desktop is now your default save location. Next you will test the change.

6. Press **[Ctrl]+[N]** to start a new, blank document.
7. Choose **File→Save As** and notice that *This PC* is highlighted rather than Recent.

8. Click **Browse** at the bottom of the Save As panel on the left.

The Save As dialog box opens with the Desktop as the target save location.



9. Click **Cancel** to close the Save As dialog box and then click **Close** in the left panel to close the blank document.

If you made changes in this exercise, you will reset them to their original state later in this chapter.

Modifying the Recent Documents List

The Open screen in Backstage view displays a list of recent documents accessed on the computer. By default, the Recent Documents list shows the last 50 documents opened on the computer. When a document appears in this list, you can open it by clicking the document name. You can turn off the feature so that no documents are listed or change the number of documents shown in the list.

If you move a document to a different folder using an application such as Windows Explorer, the link to the document in the Recent Documents list is broken. After moving a document, you need to re-navigate to the new location to open the file.

Changing the Number of Files in the Recent Documents List

If you find that you primarily work with the last few documents in the Recent Documents list before moving on to new documents, you may want to change the number of documents shown to reduce the number of documents you have to select from. Setting the number of documents to display in the list is controlled by settings in the Word Options dialog box. Settings range from 0 to 50.



View the video “Set the Number of Recent Documents to Display.”

☰ File→Options→Advanced→Show This Number of Recent Documents

Pinning a File to the Recent Documents List

Periodically, you may find yourself modifying a document over an extended period of time. To ensure that the document always appears in the Recent Documents list, you can pin it to the list. Pinned documents appear at the top of the list and remain in the list regardless of how many additional documents you access.



View the video “How to Pin a File to the Recent Documents List.”

Clearing the List of Recently Used Documents

If you perform tasks associated with specific projects, you might enjoy the ability to clear all unpinned items from the Recent Documents list, thus displaying only the documents you purposely pinned. In addition, if you are using a computer you share with others, you may want to clear the list so others won't have easy access to the documents you used, especially if you work with confidential documents.

Note!

You may not have user permission to change the Recent Documents list on a public or shared computer. The setting changes made in this section are program level and permanent.



View the video “Setting the Recently Used List to Zero.”

DEVELOP YOUR SKILLS: W11-D3

In this exercise, you will change the number of documents that appear in the Recent Documents list. You will also pin a document to the list.

Before You Begin: Seek assistance as necessary to determine whether you have user permission to change the Recent Documents list. If you do, verify the procedure for restoring the original Recent Documents settings. If not, read the steps to familiarize yourself with the process.

1. Choose **File**→**Options** and then follow these steps to change the number of documents shown in the Recent Documents list:



- A Choose the **Advanced** category.
 - B Scroll down to the Display options.
 - C Write down the value in this box and then change it to **10**.
2. Click **OK**, choose **File**→**Open**, and note that a maximum of ten documents appear in the Recent Documents list. (Your list may have fewer than ten documents.)
3. Right-click any document in the list and notice (but don't click) the Clear Unpinned Documents command.

Clicking this would clear all unpinned documents from the list.
4. Tap **[Esc]** to close the menu.

Now you will pin, and then unpin, a document in the list.
5. Right-click any document in the list and choose **Pin to List**.

The document moves to the Pinned category at the top of the list and a pushpin icon appears on the right.
6. Click the **pushpin** icon of the document you just pinned to unpin it.
7. Return to the document window.

Restoring Default Settings

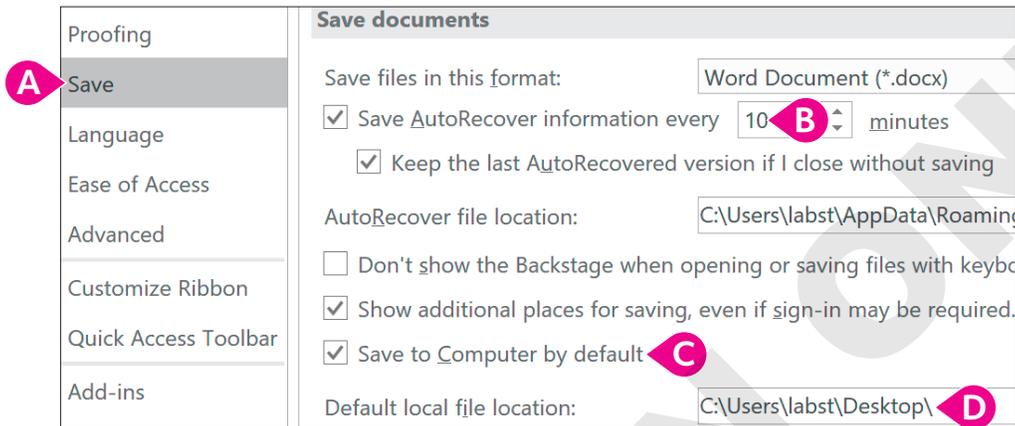
Setting custom options for the way you work is a great practice if using a computer that is assigned to you. However, these settings are permanently applied to Word on a program level, and when you are working on a computer you share with others, it's generally a good idea to restore the default settings you have changed.

DEVELOP YOUR SKILLS: W11-D4

In this exercise, you will restore the default settings in the Word Options dialog box. By restoring the options to their original state, you also will review the features just covered.

Before You Begin: Retrieve the default settings you wrote down when you modified options earlier.

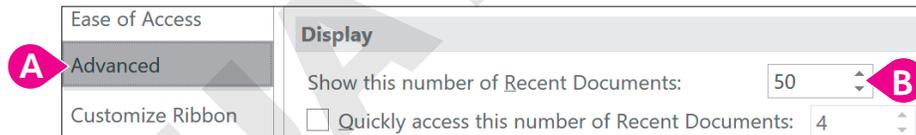
1. Choose **File**→**Options** and then follow these steps to restore your AutoRecover interval:



- A Choose the **Save** category.
- B Reset the AutoRecover duration to **10** or enter the setting you wrote down when you made the change in this field.
- C Check this box if it was previously unchecked.
- D Enter the file location path you wrote down earlier.

Leave the dialog box open.

2. Follow these steps to restore your Recent Documents list:



- A Choose the **Advanced** category.
- B Reset the number of recent documents to **50** or enter the original setting you wrote down when you made the change in this field.

3. Click **OK**.

Document Properties

Each time you create a new document, properties information is pulled from options set on your computer as well as information detected about the document. Properties information appears in the Properties panel of the Info screen in Backstage view. Information includes such items as the file size, the date on which it was created/modified, and the author's name. The Advanced Properties feature contains more data about your document, and this is where you can create custom properties.

The Advanced Properties dialog box contains the widest array of properties.

Entering information in the Properties panel also populates fields in the Advanced Properties dialog box.

Checking the “Thumbnails” checkbox fills in the Contents tab with headings (Heading 1 through Heading 3 styles) that appear in the document.

Following are descriptions of the tabs in the Advanced Properties dialog box:

- ▶ **General:** Contains some of the same information as the Properties panel in Backstage view, as well as additional information, including location and file attributes, such as Read Only
- ▶ **Summary:** Contains the same text boxes as the Properties panel, including Title, Keywords (Tags), and Comments; checking the Save Thumbnails for All Word Documents checkbox fills in the Contents tab with headings (Heading 1 through Heading 3 styles) that appear in the document
- ▶ **Statistics:** Contains many of the same statistics as the Properties panel in Backstage view as well as additional fields, such as Paragraphs, Lines, and Characters
- ▶ **Contents:** Contains the document headings (Heading 1 through Heading 3 styles) when the Save Thumbnails for All Word Documents checkbox is checked on the Summary tab
- ▶ **Custom:** Allows you to define additional fields, which can be useful when searching for a document in a large group of documents

DEVELOP YOUR SKILLS: W11-D5

In this exercise, you will add comments and keywords (tags) to the procedures manual.

1. Save your file as: **W11-D5-DraftProcRevised**
2. Choose **File→Info** and review the document properties in the Properties panel on the right side of the screen.

3. Enter the information shown in the Title, Tags, and Comments fields, and then enter your name in the Author field.

The screenshot shows the Microsoft Word Properties panel. The 'Properties' menu is expanded. The 'Title' field contains 'Draft Procedures Manual', 'Tags' contains 'Staff, Nurses, Aids, Doctors', and 'Comments' contains 'Sent for review early in April.'. The 'Author' field contains 'Jill Murphy'. The 'Last Modified By' field contains 'Not saved yet'.

4. Click the **Properties menu** button ▼ at the top of the Properties panel and choose **Advanced Properties**.
The properties you entered in the Properties panel are replicated in the Summary tab.
5. Click **OK** and then return to the document.
6. Save the file.

Creating a Custom Property

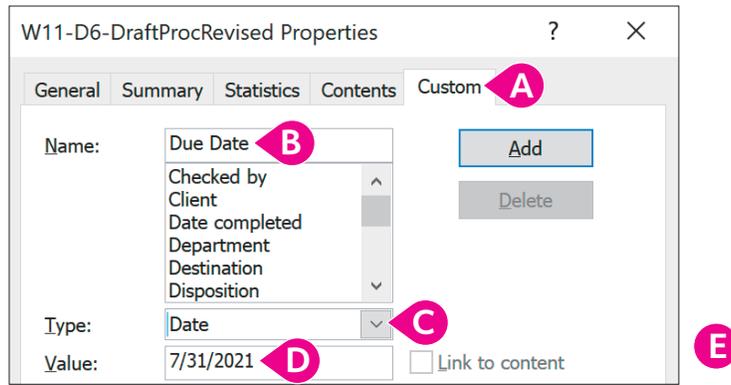
When there is no existing property to meet your needs, you can create a custom property and define the type of data you plan to place in the field, including Text, Date, and Number. A list of suggested names is provided for custom fields, but you can also define your own property names. For example, if you want to include a due date for a document, you can create a new Due Date property and assign Date as the data type. These custom properties don't appear in the Properties panel in the Backstage Info view. To view them, you need to refer to the Custom tab of the Advanced Properties dialog box.

DEVELOP YOUR SKILLS: W11-D6

In this exercise, you will create a custom property for the procedures manual to hold the due date for the final version of the document.

1. Save your file as: **W11-D6-DraftProcRevised**
2. Choose **File→Info**, click the **Properties menu** button ▼ at the top of the Properties panel, and choose **Advanced Properties**.

3. Follow these steps to create a new custom property:



- A** Click the **Custom** tab.
- B** Type **Due Date** in the Name field.
- C** Select **Date** from the Type list.
- D** Type **7/31/2021** in the Value field.
- E** Click **OK**.

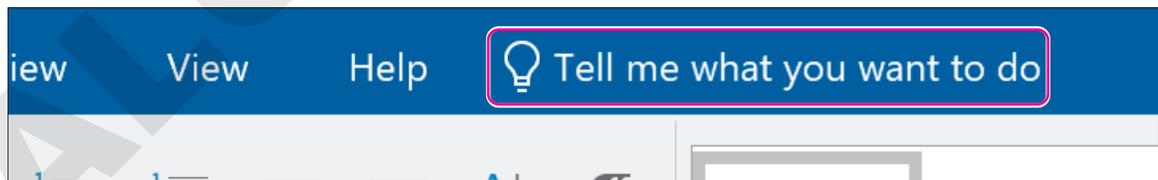
Remember, custom properties do not appear in the Properties panel in Backstage view. Refer to the Custom tab in the Advanced Properties dialog box to view custom properties.

4. Save the document.

Accessibility

Word offers several options to enhance accessibility, making it more user-friendly for those who have difficulty with the default settings. For those with reading difficulties, Word provides tools to enhance document readability and can also read documents aloud in a variety of digital voices.

One of the most useful Accessibility features is the Tell Me box, which allows users to simply enter the command they are looking for instead of using the Ribbon to find it. Word also works well with a variety of screen reader software, and it can adapt easily to various types of keyboards.



“Tell me what you want to do” box



Add Alternative Text

Using alternative text helps people with limited vision understand the meaning of pictures and graphics. Although traditionally used with web pages, you can also add alternative text to regular Word documents for greater accessibility.

☰ Picture Tools→Format→Accessibility→Alt Text 

DEVELOP YOUR SKILLS: W11-D7

In this exercise, you will view the document in the Immersive Learning Tools feature using the Tell Me box. You'll also add alternative text to the image at the top of the document.

1. Save your file as: **W11-D7-DraftProcRevised**

Choose the View tab on the Ribbon to see the location for Immersive→Learning Tools. Return to the Home tab before proceeding to the next step.

2. Click anywhere inside the **Tell me what you want to do** box next to the Help tab on the Ribbon and type: **learning tools**
3. Choose the **Learning Tools** option at the top of the results list.



The command is executed just as if you had selected it from the View tab in the Ribbon. The Tell Me box can execute any ribbon command; all you have to do is type it in.

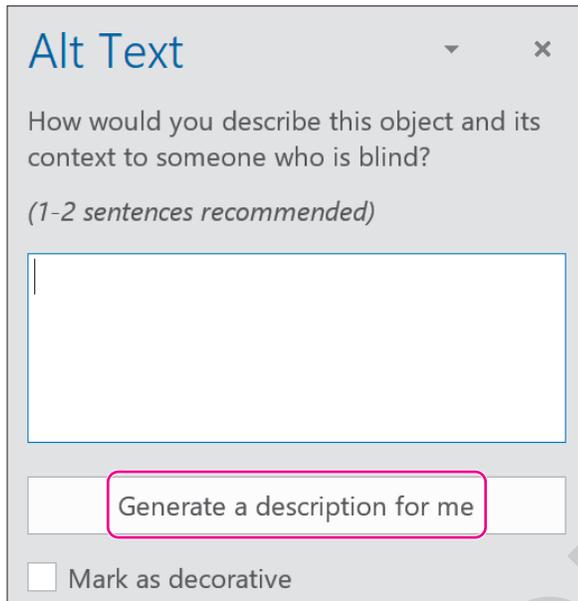
4. If necessary, in the Immersive Learning Tools view, choose **Immersive→Learning Tools→Learning Tools→Column Width menu button ▼→Narrow**.
5. Choose **Immersive→Learning Tools→Learning Tools→Syllables** to turn on syllable breaks.
6. Place the insertion point at the beginning of the first paragraph in the main document and choose **Immersive→Learning Tools→Learning Tools→Read Aloud**.
7. Choose **Immersive→Learning Tools→Close→Close Learning Tools** to close the Immersive view and stop the read aloud feature.

Next, you'll add alternative text to the logo image at the top of the document.

8. Scroll to the top of the document's cover page and select the **Raritan Clinic East** logo image.
9. Choose **Picture Tools→Format→Accessibility→Alt Text** .

10. In the Alt Text panel, click **Generate a description for me** to have Word try to analyze the image and generate an automatic description.

If this is the first time you're using this feature, you may see a box that asks if you want to Use Intelligent Services. If the box appears, click Turn On.



Word generates the description A close up of a logo with high confidence. If this were inaccurate, you could type in your own alt text description or modify the automatically generated description.

11. Close the Alt Text panel and then save and close the file.

Global Content Standards and Language Options

Word uses language settings to determine how to proof your documents or where to make suggestions concerning spelling and grammar. In addition, Word can translate words and phrases you type into a variety of languages. Word can also translate entire documents with a single click.

☰ Review → Language → Language  menu button ▼ → Set Proofing Language

☰ Review → Language → Translate  menu button ▼ → Translate Selection or Translate Document

DEVELOP YOUR SKILLS: W11-D8

In this exercise, you'll check the default proofing language to make sure it's set to English. Then, you'll use Word's Translator to translate a simple phrase from English to Spanish and then translate an entire document into Spanish.

1. Open a new, blank document.
2. Choose **Review** → **Language** → **Language**  menu button ▼ → **Set Proofing Language**.
English (United States) is selected and the checkbox for detecting the language automatically is checked.
3. Click **Cancel**.

4. Type this text into the blank document: **Hello! How are you?**
5. Highlight the phrase **How are you?** and choose **Review**→**Language**→**Translate**  menu button ▼→**Translate Selection**.

If this is the first time you're using the Translation feature, you may see a box that asks if you want to Use Intelligent Services. If so, click Turn On.

6. In the Translator panel that appears, change the To language to **Spanish**.



7. Close the document without saving and then open **W11-D8-Newsletter**.
8. If necessary, choose **Review**→**Language**→**Translate**→**Set Document Translation Language**.
9. In the Translator panel, set the From language to **English** if necessary, set the To language to **Spanish**, and click **Translate**.



After a few moments, the translated document will appear.

10. Save the translated file as **W11-D8-NewsletterSpanish** and then close it.
11. Close the English version of the file without saving.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W11-R1

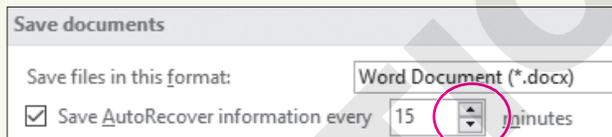
Streamline Kids for Change Office Procedures

Kids for Change is streamlining its office procedures. Staff members will review various options to determine which changes will help them be more efficient. In this exercise, you will prepare screenshots of the features you would like staff members to consider for personalizing Word.

1. Open **W11-R1-WordOptions** from your **Word Chapter 11** folder and save it as: **W11-R1-WordOptionsRevised**
First, you will create an AutoCorrect shortcut for a Kids for Change Nature Hikes project.
2. Choose **File**→**Options**→**Proofing** and click **AutoCorrect Options**.
3. Type **kfcnh** in the Replace field, type **Kids for Change Nature Hikes** in the With field, and click **OK** twice.
4. Position the insertion point at the end of the document and then type **AutoCorrect Shortcut: kfcnh** and tap **Enter**.

Now you will work with Save options.

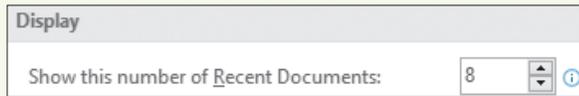
5. Choose **File**→**Options**, choose the **Save** category, and change the AutoRecover interval to **15** minutes.



6. Check the **Save to Computer by default** checkbox.
7. Click **Browse** to the right of the Default Local File Location field.
8. In the Modify Location dialog box, navigate to the **Desktop** and click **OK**.
Now you will take a screenshot of the Word Options dialog box and paste it into your Word Options document.
9. Press **Alt**+**PrtScn** to take a screenshot of the dialog box and then click **OK** to close the dialog box.
10. Press **Ctrl**+**V** to paste the screenshot; resize it to about a third of its original size.
11. Create a new, blank document so you can test the default local file location.
12. Choose **File**→**Save As** and click **Browse** at the bottom of the left-hand panel.
The path at the top of the dialog box leads to the Desktop. The change worked!
13. Click **Cancel** to close the Save As dialog box.
14. Click **Close** in the far-left panel to close the blank document without saving it.

Customize the Recent Documents List

15. Choose **File**→**Options**→**Advanced**.
16. Scroll down to the Display options and change the number of recent documents to **8**.



17. Press **[Alt]+[PrtScn]** to take a screenshot and click **OK**.
18. Ensure the insertion point is at the end of the document, tap **[Enter]**, and paste the screenshot; resize it to about a third of its original size.
19. If necessary, resize the screenshots until they both fit on the first page of the document.
20. Choose **File**→**Open** and notice that a maximum of eight documents appear in the Recent Documents list.
Now you will pin a document to the Recent Documents list.
21. Hover the mouse pointer over a filename to display the pushpin icon at the right and then click the **pushpin** to pin the document to the list.
The document will remain in the list until it is unpinned.
22. Right-click the document you just pinned and choose **Unpin from List**.
You can clear all documents, except pinned documents, from the list.
23. Right-click any document in the Recent Documents list and notice (but don't click) the Clear Unpinned Documents command.
24. Tap **[Esc]** to close the menu.
Now you will restore the settings you changed in the Word Options dialog box.
25. Retrieve the list of changes you noted earlier and, if necessary, restore these options to their original settings:
 - AutoRecover interval
 - Save to Computer by Default checkbox
 - Default Local File Location path
 - Number of Recent Documents displayed

Create a Custom Property

26. Choose **File**→**Info**, click the **Properties menu** button ▼ at the top of the Properties panel, and click **Advanced Properties**.
27. Click the **Custom** tab and follow these guidelines to create a custom property:
 - Choose **Checked By** from the Name list.
 - Leave the data type as Text.
 - Type **Reviewer Sean Oct 17** in the Value field.
You have requested that each reviewer sign in here so you can easily track who has already reviewed the document and when.
28. Take a screenshot of the dialog box and click **OK**.
29. Return to the document and make sure the insertion point is at the end of the document.

30. Tap **Enter**, paste the screenshot in your Word Options document, and resize it to about a third of its original size.

This screenshot will appear on page 2.

31. Save and close the file.

REINFORCE YOUR SKILLS: W11-R2

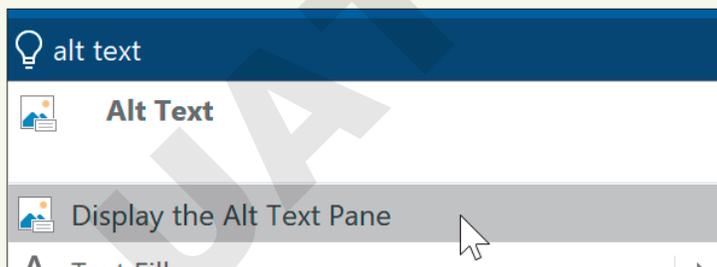
Make Kids for Change Documents Accessible

Kids for Change is making their documents accessible for users with disabilities. They are also translating their documents to increase readership. In this exercise, you will activate accessibility features in a newsletter and translate the newsletter into French.

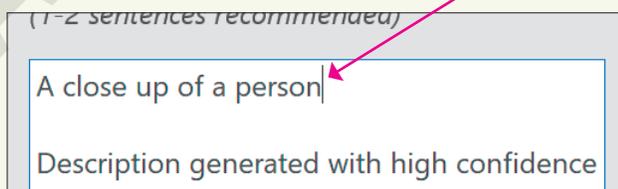
1. Open **W11-R2-Vaccine** from your **Word Chapter 11** folder and save it as: **W11-R2-VaccineRevised**
2. Choose **View**→**Immersive**→**Learning Tools**.
3. If necessary, set the width to Wide by choosing **Immersive**→**Learning Tools**→**Learning Tools**→**Column Width** menu button ▼→**Wide**.
4. If necessary, choose **Immersive**→**Learning Tools**→**Learning Tools**→**Syllables** to turn on syllable breaks.
5. Choose **Immersive**→**Learning Tools**→**Close**→**Close Learning Tools**.

Use the Tell Me Box to Add Alternative Text to an Image

6. Select the vaccine image at the end of the second column and then click in the **Tell Me** box.
7. Type **alt text** and choose **Display the Alt Text Pane** from the list of results.



8. In the Alt Text pane, click **Generate a description for me**.
The automatically generated description needs just a little extra detail.
9. Place the insertion point after the word **person** in the generated description.



10. Tap **Spacebar** and type: **being vaccinated**
11. Close the Alt Text pane and save the file.

Translate the Document

12. Place the insertion point anywhere in the text and choose **Review**→**Language**→**Translate** menu button ▼→**Set Document Translation Language**.
13. In the Translator panel that appears, set **French** as the To language and click **Translate**.
14. Save the French version of the document as **W11-R2-VaccineRevisedFrench** and close it.
15. In the English version of the document, close the Translator panel and close the document.

REINFORCE YOUR SKILLS: W11-R3

Personalize Options and Translate a Document

Kids for Change will participate in an after-school tutoring program. In this exercise, you will personalize Word to work more efficiently. You'll add alt text to the image and then translate the document into Italian.

1. Open **W11-R3-WaterPollution** from your **Word Chapter 11** folder and save it as: **W11-R3-WaterPollutionRevised**
2. Choose **File**→**Options**→**Save** and change the AutoRecover interval to **5** minutes.
3. Check the **Save to Computer by default** checkbox.
4. Click **Browse** to the right of the Default Local File Location field, navigate to the Desktop, and click **OK** twice.
Now you will observe the change to the default file location.
5. Start a new, blank document.
You saved the tutoring file outside of the default location, so if you click Browse, you will access its original storage location. You will use the new, blank document to test the storage location you just set.
6. Choose **File**→**Save As** and note that *This PC* is highlighted.
7. Click **Browse** and notice that the path at the top of the Save As dialog box leads to the Desktop.
8. Click **Cancel** to close the Save As dialog box and then close the blank document without saving it.

Pin a Document to the Recent Documents List

9. Choose **File**→**Open**, hover the mouse pointer over a filename, and notice the pushpin icon to its right.
10. Click the **pushpin** to move the file into the Pinned category at the top of the list.
11. Click the **pushpin** again to unpin the document and return it to the main list.
Now you will restore the default settings that you noted earlier.
12. Click **Options** on the left and restore these items to their original settings:
 - AutoRecover interval
 - Save to Computer by Default
 - Default Local File Location

Add Alt Text and Translate the Document

Now you will add alt text to the image and translate the document into Italian.

13. Select the image at the bottom of the second column and choose **Picture Tools**→**Format**→**Accessibility**→**Alt Text**.
14. In the Alt Text box, type **Two children fishing by a lake** and then close the Alt Text panel.
15. Place the insertion point anywhere in the document text, click the **Tell Me** box, and type: **translate**
16. In the results, hover the mouse pointer over Translate, and in the submenu that appears, choose **Set Document Translation Language**.
17. Set the To language to **Italian** and click **Translate**.
18. Save the translated document as **W11-R3-WaterPollutionRevisedItalian** and close it.
19. In the English version of the document, close the Translator panel.
20. Save the file and exit Word.

Apply Your Skills

APPLY YOUR SKILLS: W11-A1

Review Office Efficiency

The Universal Corporate Events office manager is reviewing various options to determine whether it's possible to make work more efficient for the company. In this exercise, you will create an AutoCorrect shortcut, change options for saving, and work with document properties.

1. Open **W11-A1-Efficiency** from your **Word Chapter 11** folder and save it as: **W11-A1-EfficiencyRevised**
2. Open the Word Options dialog box, choose the **Proofing** category, and click **AutoCorrect Options**.
3. Enter **uce** in the Replace field and **Universal Corporate Events** in the With field; click **OK** twice.
4. Position the insertion point at the bottom of the document and type **uce** to test the shortcut.
5. Open the Word Options dialog box; in the Save category, change the AutoRecover interval to **30** minutes.
6. Check the **Save to Computer by default** checkbox.
7. Use the **Browse** button to the right of the Default Local File Location and set the path to the Desktop.
8. Take a screenshot (+) of the Word Options dialog box, paste it at the end of your document, and resize it to about a third of its original size.
9. Create a new, blank document and choose **File**→**Save As**.
10. Click **Browse** to test your default file location (Desktop) and then cancel the dialog box and close the blank document.
Now you will restore the default settings.
11. Retrieve the list of default settings you wrote down earlier and reset the defaults in the Word Options dialog box.
12. In the Properties panel in Backstage view, type **Efficiency** in the Tags field.
13. Use the **Properties menu** button ▼ to open the **Advanced Properties** dialog box.
14. Follow these guidelines to add a custom property:

Property	Value
Property Name	Checked By
Property Type	Text
Property Value	Matt Robinson

As staff members review the potential procedural changes, they will enter their names in the Properties dialog box so you can tell when everyone has completed the review.

15. Take a screenshot of the Properties dialog box and click **OK**; return to the document.
16. Position the insertion point at the end of the document, generate a blank line, and paste the screenshot, resizing it to about a third of its original size.
17. Save and close the file.

APPLY YOUR SKILLS: W11-A2

Universal Corporate Events Expansion

Universal Corporate Events is preparing to expand into Mexico. To do so, it needs to be ready to translate documents into Spanish. In this exercise, you will activate Learning Tools, add alt text to the images in a document, and translate the document into Spanish.

1. Open **W11-A2-Multitasking** from your **Word Chapter 11** folder and save it as: **W11-A2-MultitaskingRevised**
2. Open the document in the Immersive Learning Tools view.
3. If necessary, set the column width to **Wide** and turn *off* the Syllables breaks; then close the Immersive Learning Tools view.
4. Select the image at the beginning of the document and open the Alt Text panel.
5. Type **Cartoon image of a man doing six things with six arms** in the Alt Text box.
6. Select the image at the end of the document and click **Generate a description for me** in the Alt Text box.
7. In the automatically generated description, replace the word *Water* with **Rocks** and close the Alt Text panel.
8. Place the insertion point anywhere in the document text, set the translation language to **Spanish**, and translate the document.
9. Save the translated document as **W11-A2-MultitaskingRevisedSpanish** and close it.
10. Close the Translator panel.
11. Save the English version of the file and close it.

APPLY YOUR SKILLS: W11-A3

Get Ready for the Corporate Trainer

Universal Corporate Events staff will be reviewing advanced Word features with a corporate trainer. The staff will practice using the features and record questions for the trainer. In this exercise, you will work with an AutoCorrect shortcut and the Word Options dialog box. You will also translate a document into Spanish.

1. Open **W11-A3-TravelTips** from your **Word Chapter 11** folder and save it as **W11-A3-TravelTipsRevised**
First you will create an AutoCorrect shortcut. You anticipate frequently typing the name of a new client, Morgan, Alexander, and Swift, so a shortcut will be a real time saver.
2. Open the Word Options dialog box, choose the **Proofing** category, and click **AutoCorrect Options**.

3. Enter **mas** in the Replace field and **Morgan, Alexander, and Swift** in the With field; click **OK** twice.
4. Click the insertion point at the end of the document, type **mas**, and tap **Enter**.
5. Open the Word Options dialog box, choose the **Save** category, and change the AutoRecover interval to **20** minutes.
6. Check the **Save to Computer by default** checkbox.
7. Use the **Browse** button to change the default local file location to the Desktop.
8. Take a screenshot of the **Word Options** dialog box, click **OK**, and paste it at the end of your document.
9. Create a new, blank document so you can test your changes.
10. In the Backstage, Save As screen, click **Browse** and check that the path at the top of the Save As dialog box targets the Desktop.
11. Click **Cancel** to close the Save As dialog box and then close the blank document without saving.
12. Restore the default settings in the Word Options dialog box.

Add Alt Text and Translate the Document

Now you will add alt text to the document's image and translate it into Spanish.

13. Select the image at the end of the document and add this alt text: **ClipArt image of two travelers in an airport**
14. Translate the document into Spanish, saving the Spanish version as: **W11-A3-TravelTipsRevisedSpanish**
15. Close the Translator panel, save the English version of the file, and exit Word.



Project Grader

This chapter does not include Project Grader exercises. Project Grader content is based on the learning objectives for a chapter, and sometimes those learning objectives cannot be accurately graded by the system. Objectives from this chapter that can be accurately graded may be included in later chapters, if applicable.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W11-E1 That's the Way I See It

As the owner of a small business, you know it's important for your staff to operate as efficiently as possible. You're a whiz with Word, and you want to show your employees some features that can help them effectively organize the Word environment. Write a one- to two-page document explaining how the following might help them:

- ▶ When would it be beneficial to change the AutoRecover time interval?
- ▶ Under what circumstances would it be helpful to change the default file location?
- ▶ What is the benefit of pinning documents to the Recent Documents list?
- ▶ How can custom properties be useful?

Add two or three screenshots to help make your concepts come alive. Add your own Title and Comment to the Properties panel in Backstage view for the document you create. Save your file as:

W11-E1-WordIdeas

W11-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you've noticed your business has been increasing lately among the Latino community. To better serve your customers, you decide to start translating your monthly newsletters into Spanish. You also decide to further improve the usability of your newsletters by adding alt text to your images.

Do some research on new landscaping technologies. Write a one- to two-page newsletter about the company's expansion and some of the new landscaping technology you plan to adapt at Blue Jean Landscaping. Be sure the newsletter includes at least one image and add alt text to that image. When finished, translate the newsletter into Spanish. Save your English file as **W11-E2-BJLNewsletter** and your Spanish file as **W11-E2-BJLNewsletterSpanish**

W11-E3 Demonstrate Proficiency

The owner of Stormy BBQ just attended a Microsoft Word class at the local community college, and it opened his eyes to some of the beneficial features that he had not been aware of. Knowing that you are a very experienced Word user, he has asked you to record some ideas about how Word options, accessibility features, and translation options can benefit the business. Write a one- to two-page paper explaining what Word options (at least three) you would modify and why. Insert two images into the document and add alt text to both of them. Translate the document into another language so you can show the owner an example of Word's translation feature. Use the Properties panel to add a Title and Tag. Save your English file as **W11-E3-StormyWordFeatures** and your translated file as **W11-E3-StormyWordFeaturesTranslated**

WORD

12

Creating Custom Forms and Using Macros



Word allows you to create custom forms for others to fill out. Creating forms gives you significant control over what information is entered and where. You can also automate repetitive tasks by recording macros, which can execute a long list of steps with a single click. In this chapter, you will work with creating custom forms and macros to enhance the way you work.

LEARNING OBJECTIVES

- ▶ Activate and use hidden Ribbon tabs
- ▶ Create and use custom forms
- ▶ Create and run macros
- ▶ Edit created macros
- ▶ Use macros across documents

Project: Automating Tasks in Word

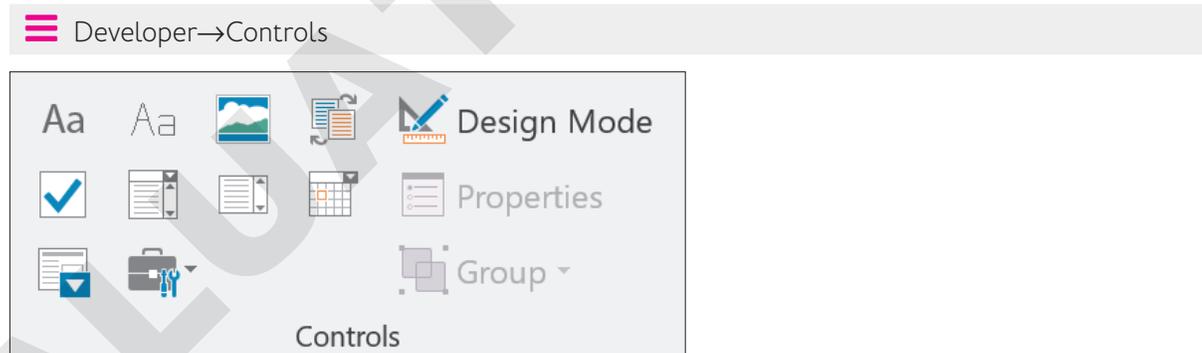
As a long-time employee of Raritan Clinic East, you've been entrusted with several new responsibilities. The clinic will be using a new electronic system for patients to enter their information, instead of using traditional pen and paper. Doing so will help automate patient information, as reception personnel will not have to take what patients have written on a form and type it into the computer. You've been tasked with creating the form that patients will use. However, this is just one of many tasks you've been given, and you realize that you can be far more efficient by automating several of the tasks in Word. After doing some research, you've learned that macros are a great way to create personalized automation tasks.

Creating a Custom Form

When you create a custom form, you increase control over where other users may enter information. Word's **content controls** allow you to create a form with check boxes, text fields, drop-down lists, and other items. For example, when users must enter a date, a Date Picker Content Control gives users the option to pick a date from a drop-down calendar instead of typing it into the field.

Each content control has specific properties. The Check Mark properties allow you to specify which symbol (for example, a checkmark or another symbol) is used to fill in the box, while the Drop-Down List properties allow you to add a series of choices to the drop-down menu attached to the field.

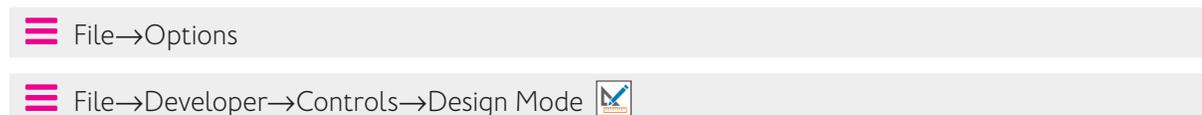
Once you've set up the main body of the document, you can then enter the necessary content controls. Content controls do not include spaces before or after the field, so remember to include them where needed. Finally, you can restrict editing to prevent others from making changes to your document's main body, while still allowing users to fill out the form fields generated by the content controls.



Preparing to Add Content Controls

The Developer tab is hidden by default; it doesn't appear on the Ribbon until you activate it, which is necessary to create custom forms. To activate the Developer tab, open Word Options and check the necessary box under the Customize Ribbon tab.

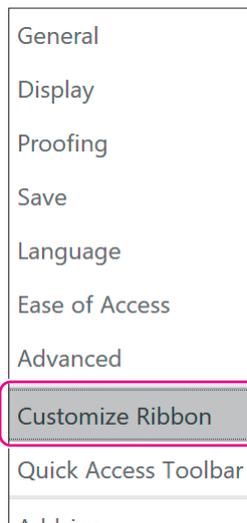
To prevent inadvertently adding content to your forms as you're building them (for example, accidentally checking a box), it's a good idea to use Design Mode. Doing so will prevent any changes to form field content.



DEVELOP YOUR SKILLS: W12-D1

In this exercise, you will build a patient form. First, you will activate the Developer tab so it appears on the Ribbon and turn on Design Mode. Then you'll add content control fields and change their properties. Finally, you'll restrict editing of this document to prevent patients from making changes to anything but the form fields.

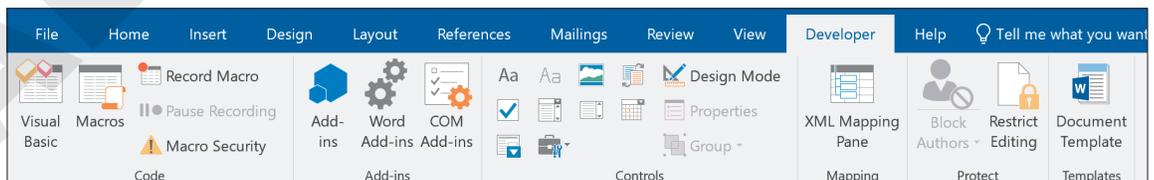
1. Open **W12-D1-PatientInfo** from your **Word Chapter 12** folder and save it as: **W12-D1-PatientInfoRevised**
2. Choose **File**→**Options**→**Customize Ribbon**.



3. In the Customize Ribbon pane, check the **Developer** box and click **OK**.



The Developer tab now appears in the Ribbon.



4. Turn on Design Mode by choosing **Developer**→**Controls**→**Design Mode** .

Add Content Controls

- Place the insertion point after the colon at the end of the first form line, labeled *Today's Date*, tap **Spacebar**, and choose **Developer**→**Controls**→**Date Picker Content Control**.

Because you are in Design Mode, Word inserts a noneditable Date Picker Content Control field. When you turn off Design Mode, as you will later in the exercise, you will see how the final editable field will wlook.

Today's Date:

- Implement the controls as shown, remembering to place the insertion point after the colon at the end of each line, tap **Spacebar**, and choose the control:

Line	Implement Control
Patient Name	Developer → Controls → Rich Text Content Control
Patient Phone Number	Developer → Controls → Rich Text Content Control
Patient Date of Birth	Developer → Controls → Date Picker Content Control
Yes	Developer → Controls → Check Box Content Control
No	Developer → Controls → Check Box Content Control

Today's Date:

Patient Name:

Patient Phone Number:

Patient Date of Birth:

Do you have insurance? Yes No

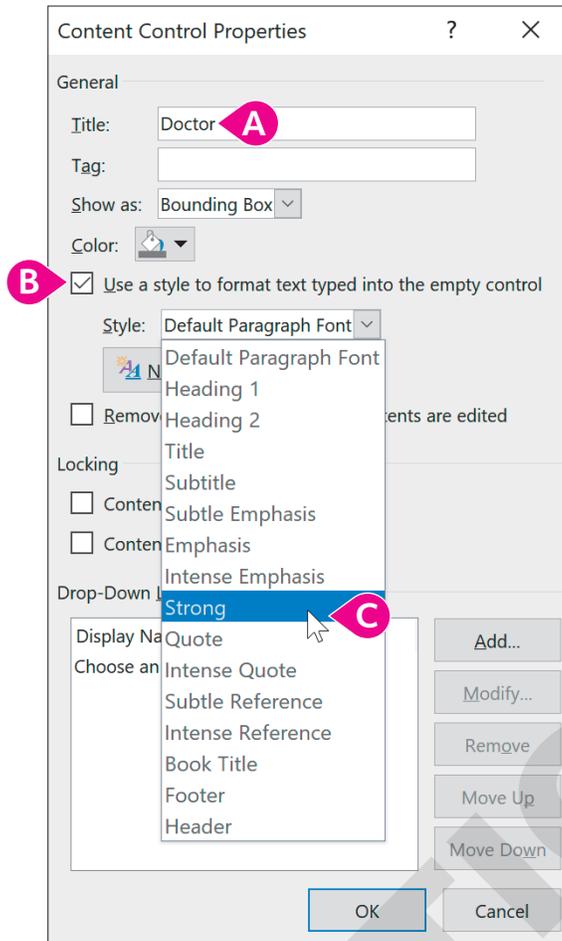
Edit Content Control Properties

- Place the insertion point after the colon at the end of the last line, tap **Spacebar**, and choose **Developer**→**Controls**→**Drop-Down List Content Control**.

A drop-down list doesn't do much good without list entries, so you will use content control properties to add these entries as well as adjust other options.

- If necessary, place the insertion point anywhere in the *Choose an item* text in the new content control field, and then choose **Developer**→**Controls**→**Properties**.

9. Follow these steps to adjust properties in the Content Control Properties dialog box:

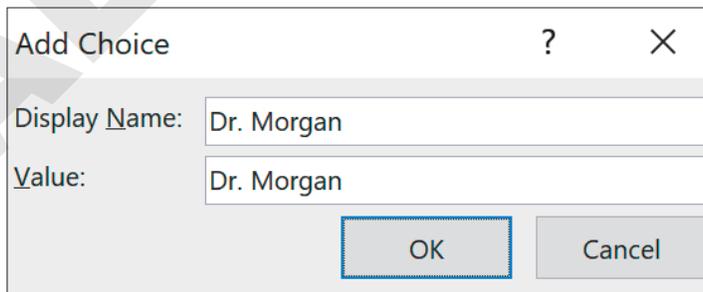


- A** Type **Doctor** as the Content Control title.
- B** Check **Use a style to format text typed into the empty control**.
- C** From the Style drop-down menu, choose **Strong**.

The Drop-Down List Properties at the bottom of the dialog box allow you to enter the list entries that patients will be able to choose from.

10. Click **Add**; in the Add Choice dialog box, type: **Dr. Morgan** in the Display Name box and click **OK**.

The same text, Dr. Morgan, will also appear in the Value box.

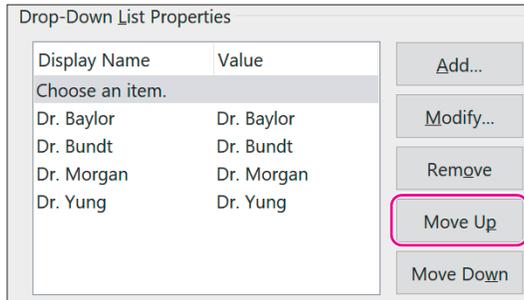


11. Repeat the process to enter three additional choices:

- **Dr. Yung**
- **Dr. Baylor**
- **Dr. Bundt**

You decide to list the doctors in alphabetical order.

12. Select **Dr. Baylor** and click **Move Up** twice.
13. Select **Dr. Bundt** and click **Move Up** twice.



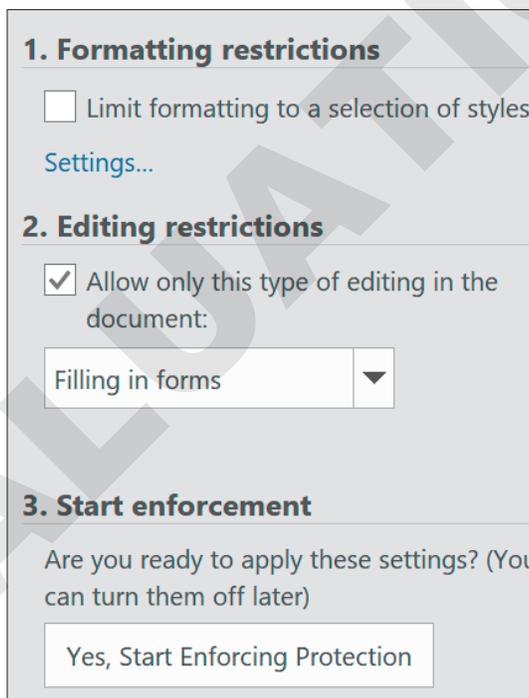
14. Click **OK** to close the Content Control Properties dialog box.
15. Choose **Developer**→**Controls**→**Design Mode**  to turn off Design Mode.

Patients will see this form when they open the file. They'll be able to use the date pickers to choose dates, enter text in the text fields, check the boxes where appropriate, and choose from the list of doctors.

Restrict Editing

Finally, you'll restrict editing so patients cannot edit the main body of the form.

16. Choose **Developer**→**Protect**→**Restrict Editing** .
17. In section 2 of the Restrict Editing panel that appears, check the **Allow only this type of editing in the document** box and select **Filling in forms**.



18. In section 3, click **Yes, Start Enforcing Protection**; in the password box, leave both boxes blank and click **OK**.

The file is ready for patients to use.

19. Turn off the Developer tab by opening the Word options window and unchecking Developer under the Customize Ribbon.
20. Close the Restrict Editing panel and then save and close the file.

Automating Tasks with Macros

Macros are useful for automating routine tasks, especially those that involve many steps. You can record a series of steps using the macro recorder and then play them back automatically when needed. For example, you may need to switch to a color printer frequently. You can record the steps of the process in a macro, and, when it's time to switch printers, the macro can quickly perform the steps. Whenever you find yourself doing the same thing over and over, you have a candidate for a macro.

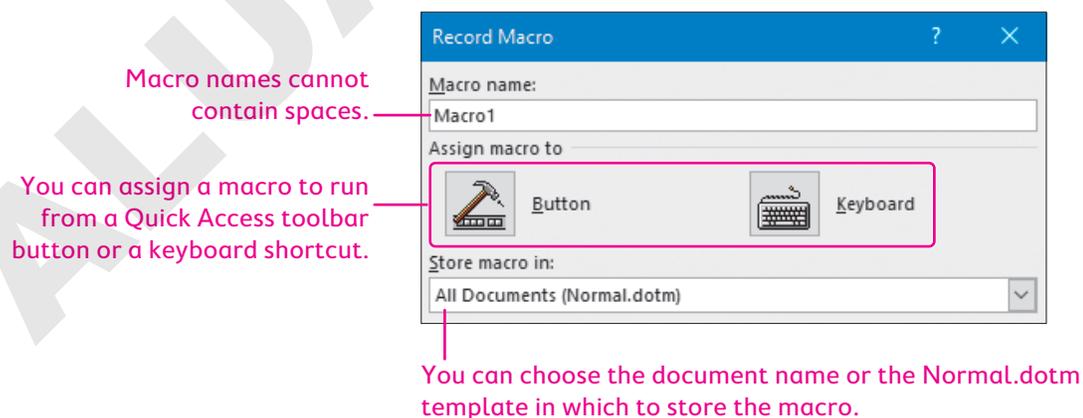
☰ View→Macros→Macros

Assigning Macros to a Toolbar or a Keyboard Shortcut

If you intend to use a macro frequently, you can assign it to a keyboard shortcut or a button on the Quick Access toolbar for easy access. This isn't required, though. You can always run a macro directly from the Macros dialog box.

Storing Macros

Macros can be stored within individual documents or entire templates, including the Normal.dotm template, which is the default location for storing macros. The *m* in the *.dotm* file extension indicates the template can contain macros. Macros stored in the Normal.dotm location are available to all documents on the system, meaning you can create a macro using one document, save it under the Normal.dotm template as shown in this image, and then run the macro on other documents. No matter where you choose to store your macro, keep in mind that the macro name cannot contain spaces but will accept other characters, such as the underscore.



Recording Limitations

Certain mouse motions such as scrolling, selecting options from drop-down lists, and resizing windows cannot be recorded in macros. You may also find that certain commands are grayed out on the Ribbon or in the drop-down list during the macro recording. You can overcome these limitations by choosing alternative techniques. For example, if selecting an item from a drop-down list

doesn't record in a macro, display the dialog box containing the feature and make the selection there. Instead of scrolling in a document, use arrow keys to position the insertion point (keystrokes are recorded). Likewise, when selecting text with the mouse fails to record, try **[Shift]** plus arrow keys or other keyboard shortcuts.

When you record a macro and change settings in a dialog box using arrow keys, the change normally sticks until you exit Word; this means the dialog box doesn't reset to its default state. As a result, running the macro again in the same session may change the setting to the *next* option in the dialog box.

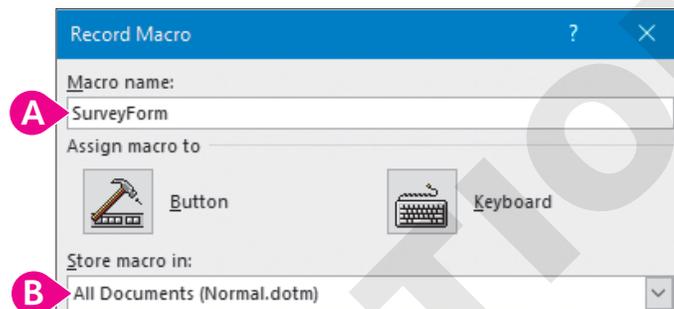
Note!

When necessary, reset the dialog box to its default state as part of the macro.

DEVELOP YOUR SKILLS: W12-D2

In this exercise, you will record a macro that sets up the orientation, margins, and page size for a survey form. The macro will also insert and format text.

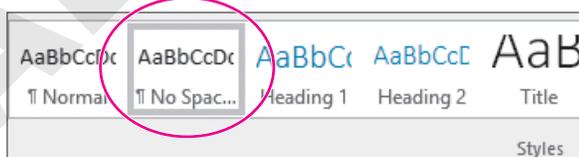
1. Create a new, blank document.
2. Choose **View**→**Macros**→**Macros**  **menu button** ▼→**Record Macro**.
3. Follow these steps to name the macro and begin the recording process:



- A Type **SurveyForm** (no spaces) in the Macro Name field.
- B Ensure the storage location is the **Normal.dotm** template, which makes the macro available to all documents on your computer, and click **OK**.

The mouse pointer now has a cassette tape attached to it, indicating that your steps are being recorded. Now you will perform the steps to record.

4. Choose **Home**→**Styles** and click the **No Spacing** style in the Quick Styles gallery.
This sets line spacing at 1.0 and removes the after-paragraph spacing.



5. Choose **Home**→**Font**→**Bold** .
6. Type: **Raritan Clinic East Pediatric Diagnostic Specialties**
7. Choose **Layout**→**Page Setup**→**Orientation**  and then choose **Landscape**.
8. Choose **Layout**→**Page Setup**→**Margins**  and then choose **Custom Margins**.

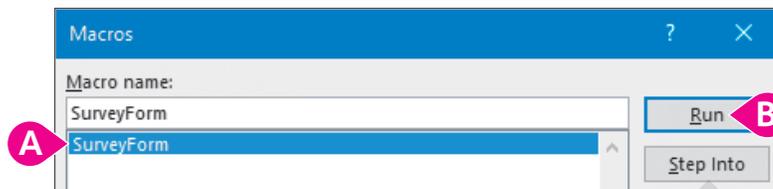
9. Set the top and bottom margins to **0.4"** and the left and right margins to **0.5"**.
10. Click the **Paper** tab at the top of the dialog box and then set the width to **7"** and the height to **5"**.
11. Click **OK** to apply the settings.

Stop Recording and Run the Macro

12. Choose **View**→**Macros**→**Macros**  menu button ▼→**Stop Recording**.

The macro is now ready for playback.

13. Close the document without saving it and then create a new, blank document.
14. Choose **View**→**Macros**→**Macros** .
15. Follow these steps to run the macro:



- A Choose your **SurveyForm** macro.
- B Click **Run**.

Your macro creates a copy of your survey form. The heading line is selected. You can click to deselect. If you made an error in the macro, you could delete the incorrect macro and record it again. Later in the chapter, you will learn to make minor edits in the VBA Editor.

16. Close the document without saving it and then create a new, blank document.

Editing Macros with the VBA Editor

Visual Basic for Applications (VBA) is a macro programming language that runs in Office 2019 applications. When you record a macro, you are creating a Visual Basic module containing program instructions that execute when you run the macro. This topic provides a brief introduction to Visual Basic, but a complete discussion is beyond the scope of this course.

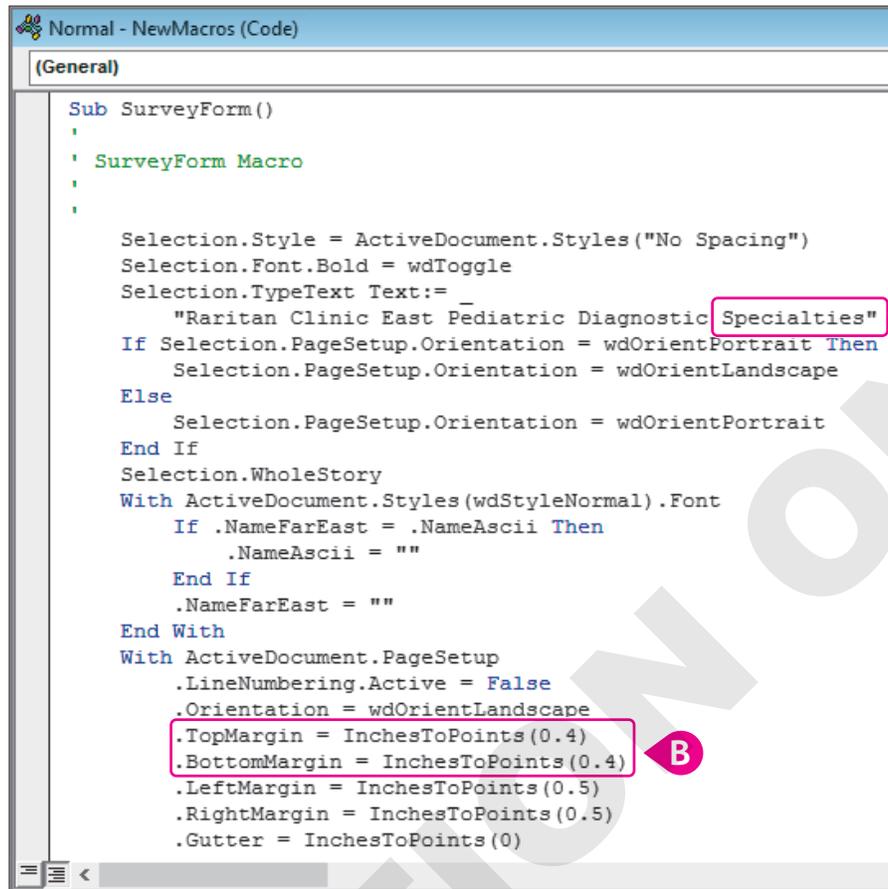
You can edit a macro by displaying the Visual Basic module and modifying the code. The editor has its own menus, toolbars, and commands, which allow you to develop, edit, and test Visual Basic applications.

DEVELOP YOUR SKILLS: W12-D3

In this exercise, you will open the Visual Basic editor and revise your macro. Then you will run the modified macro.

1. Choose **View**→**Macros**→**Macros** .
2. Choose your **SurveyForm** macro and click **Edit**.

- Follow these steps to modify the code:



```

Normal - NewMacros (Code)
(General)

Sub SurveyForm()
'
' SurveyForm Macro
'
Selection.Style = ActiveDocument.Styles("No Spacing")
Selection.Font.Bold = wdToggle
Selection.TypeText Text:= _
    "Raritan Clinic East Pediatric Diagnostic Specialties"
If Selection.PageSetup.Orientation = wdOrientPortrait Then
    Selection.PageSetup.Orientation = wdOrientLandscape
Else
    Selection.PageSetup.Orientation = wdOrientPortrait
End If
Selection.WholeStory
With ActiveDocument.Styles(wdStyleNormal).Font
    If .NameFarEast = .NameAscii Then
        .NameAscii = ""
    End If
    .NameFarEast = ""
End With
With ActiveDocument.PageSetup
    .LineNumbering.Active = False
    .Orientation = wdOrientLandscape
    .TopMargin = InchesToPoints(0.4)
    .BottomMargin = InchesToPoints(0.4)
    .LeftMargin = InchesToPoints(0.5)
    .RightMargin = InchesToPoints(0.5)
    .Gutter = InchesToPoints(0)
End With

```

- Change the word *Specialties* to: **Specialists**
 - Change the top and bottom margin settings from 0.4 to: **0.5**
- Choose **File**→**Close** and return to Microsoft Word.
The changes are saved automatically. Now you will test the edited macro.
 - Choose **View**→**Macros**→**Macros** , choose **SurveyForm** in the Macro Name list, and click **Run**.
Notice that the word Specialties has changed to Specialists.
 - Choose **Layout**→**Page Setup**→**Margins** →**Custom Margins**.
Notice that the top and bottom margins are now set to 0.5.
 - Close the dialog box.
 - Close the document without saving and then create a new, blank document.

Running Macros from the Quick Access Toolbar

When you create a macro to automate repetitive tasks, you are trying to increase efficiency. To make macros run more efficiently, you can assign them to a button on the Quick Access toolbar or to a shortcut keystroke. By taking advantage of these time-saving tools, you alleviate the tedious nature of displaying the Macros dialog box and selecting the macro each time you want to run it.

You can assign a toolbar button or keyboard shortcut to a macro as you record it. In addition, you can assign a toolbar button to an existing macro using the Quick Access toolbar commands in the

Word Options dialog box. Word offers numerous button images you can choose to help identify your macro buttons.



View the video “Assign a Macro to the Quick Access Toolbar.”

DEVELOP YOUR SKILLS: W12-D4

In this exercise, you will assign the SurveyForm macro to a Quick Access toolbar button.

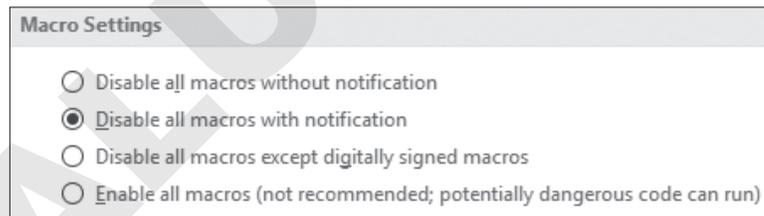
1. Choose **File**→**Options**→**Quick Access Toolbar**.
2. Follow these steps to assign a macro button to the Quick Access toolbar:



- A In the Choose Commands From menu, choose **Macros**.
 - B Select the **Normal.NewMacros.SurveyForm** macro.
 - C Ensure **For All Documents (Default)** is chosen here.
3. Click **Add** in the middle of the dialog box and then click **OK**.
Notice that a new button appears on the Quick Access toolbar.
4. Hover the mouse pointer over the button to see the button name in a ToolTip and then click the button to run the macro.

Macro Security

Macro attacks were more prevalent in earlier versions of Microsoft Office. Added security features in recent versions have caused virus creators to pursue other avenues; however, it’s always better to be safe than sorry. The Trust Center in the Word Options dialog box contains security settings.



MACRO SETTINGS OPTIONS

Option	What It Does
Disable all macros without notification	Word disables all macros and does not notify users
Disable all macros with notification	The default setting; gives the user the option to enable or disable a macro
Disable all macros except digitally signed macros	Allows users to enable or disable only digitally signed macros
Enable all macros (not recommended; potentially dangerous code can run)	Significantly reduces security and could cause serious damage

Deleting Macros

You may create a macro for use in a special project, and when the project is complete, you no longer need the macro. Deleting a macro when it's no longer required helps keep the list of macros from becoming unwieldy.

DEVELOP YOUR SKILLS: W12-D5

In this exercise, you will review security settings and delete the macro you previously created. Finally, you will remove the macro button from the Quick Access toolbar.

1. Choose **File**→**Options**→**Trust Center**.
2. Click **Trust Center Settings** and review the Macro Settings options at the top of the dialog box.
You will not make any changes to security settings.
3. Click **Cancel** twice to close the dialog boxes.
Now you will delete your macro.
4. Choose **View**→**Macros**→**Macros** .
5. Choose the **SurveyForm** macro in the Macro Name list, click **Delete**, and click **Yes** to verify the deletion; close the dialog box.
Now you will remove the macro button from the Quick Access toolbar.
6. Right-click the **macro** button and choose **Remove from Quick Access Toolbar**.
7. Exit Word without saving the document.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W12-R1

Create a Volunteer Form

Kids for Change is always looking for volunteers to help with its various community projects. You've been asked to create a form to help streamline the volunteering process. In this exercise, you will add content control fields to the form and restrict editing so volunteers can fill out the form but not change the form itself.

1. Open **W12-R1-VolunteerForm** from your **Word Chapter 12** folder and save it as: **W12-R1-VolunteerFormRevised**
2. Choose **File**→**Options**→**Customize Ribbon**.
3. In the Customize the Ribbon pane, check the **Developer** box and click **OK**.
4. Turn on Design Mode by choosing **Developer**→**Controls**→**Design Mode** .
5. Place the insertion point after the end of the first form line (*What is your name?*), tap **Spacebar**, and choose **Developer**→**Controls**→**Rich Text Content Control** .
6. Implement the controls as shown, remembering to place the insertion point after the colon at the end of each line, tap **Spacebar**, and choose the control:

Line	Implement Control
Best phone number	Rich Text Content Control  .
Which project	Drop-Down List Content Control  .
What date	Date Picker Content Control  .
Yes	Check Box Content Control  .
No	Check Box Content Control  .

Edit Content Control Properties

7. Place the insertion point anywhere in the drop-down list content control at the end of the third line and choose **Developer**→**Controls**→**Properties** .
8. Using the **Add** button toward the bottom of the Content Control Properties dialog box, add these three items as choices for the drop-down list:
 - **Recycling Initiative**
 - **Scholarship Fund Drive**
 - **School Transportation**
9. Click **OK** to close the Content Control Properties dialog box.
10. Choose **Developer**→**Controls**→**Design Mode**  to turn off Design Mode.

Restrict Editing

11. Choose **Developer**→**Protect**→**Restrict Editing** .
12. In section 2 of the Restrict Editing panel, check the box and select **Filling in Forms** from the drop-down menu.

13. In section 3, click **Yes, Start Enforcing Protection**; in the password box, leave both boxes blank and click **OK**.
14. Turn off the Developer tab, close the Restrict Editing panel, and save and close the file.

REINFORCE YOUR SKILLS: W12-R2

Create Kids for Change Carbon Footprint Macro

Kids for Change operates on a tight budget, so it types its own document header information instead of having it printed professionally. The group is working on a carbon footprint project and wants that information to appear in the headers of documents related to the project. Because this is something the group will do over and over, it knows it has a good candidate for a macro. In this exercise, you will create and test the macro.

1. Create a new, blank document.
2. Choose **View**→**Macros**→**Macros**  **menu button** ▼→**Record Macro**.
3. Name the macro **Header** and verify the Normal template is chosen in the Store Macro In field.
4. Click **OK** to start recording.

The mouse pointer now has a cassette tape attached to it so you know your steps are being recorded.

5. Choose **Insert**→**Header & Footer**→**Header**  and then choose **Edit Header** at the bottom of the gallery.
6. Tap **Tab** to position the insertion point in the center of the header and type: **Kids for Change**

You can't double-click in the document body to close the header area. This is one of the mouse movements that the macro recorder can't record.

7. Choose **Header & Footer Tools**→**Design**→**Close**→**Close Header and Footer** .
8. Choose **View**→**Macros**→**Macros** **menu button** ▼→**Stop Recording**.
9. Close the document without saving; start a new, blank document.
10. Choose **View**→**Macros**→**Macros**, make sure the Header macro is chosen, and click **Run**.
11. Close the document without saving; start a new, blank document.

Use the VBA Editor to Modify the Macro

12. Choose **View**→**Macros**→**Macros**, verify the Header macro is chosen, click **Edit**, and locate the *Kids for Change* text.

```
End If
ActiveWindow.ActivePane.View.SeekView = wdSeekCurrentPageHeader
Selection.TypeText Text:=vbTab & "Kids for Change"
ActiveWindow.ActivePane.View.SeekView = wdSeekMainDocument
```

13. Position the insertion point before the quotation mark and after the word *Change*, tap **Spacebar**, and type: **Carbon Footprint Project**
14. Choose **File**→**Close** and return to Microsoft Word.

Now you will assign the macro to a keyboard shortcut and run the macro to verify your editing changes.

Assign the Macro to a Keyboard Shortcut

15. Choose **File**→**Options**→**Customize Ribbon**.

Notice the Customize button next to Keyboard Shortcuts at the bottom of the left-hand panel.



16. Click **Customize...** and then scroll down and choose **Macros** from the Categories list on the left.
17. Choose the **Header** macro in the field on the right.
18. Position the insertion point in the **Press New Shortcut Key** field and press **[Ctrl]+[9]**.
Below the Current Keys field at left, notice that the shortcut you entered is currently unassigned.
19. Click **Assign** to assign the shortcut to your macro, click **Close**, and then click **OK**.
Now you will test the macro.
20. Press **[Ctrl]+[9]** to run the macro and then notice the editing change you made.

Review Macro Security and Delete the Macro

21. Choose **File**→**Options**→**Trust Center**, click **Trust Center Settings**, and review the Macro Settings at the top of the dialog box.
You will not change any security settings.
22. Click **Cancel** twice to close the dialog boxes.
23. Choose **View**→**Macros**→**Macros** , verify the Header macro is chosen, and click **Delete**.
24. Click **Yes** to confirm the deletion and then close the Macros dialog box.
25. Save the file as **W12-R2-Header** in your **Word Chapter 12 folder** and then close it.

REINFORCE YOUR SKILLS: W12-R3

Create a Form and Use a Tutoring Schedule Macro

Kids for Change needs your help with its after-school tutoring program. In this exercise, you will create a form for tutoring volunteers and create a macro that generates a table in which you can set up the weekly tutoring schedule.

- Open **W12-R3-Tutoring** from your **Word Chapter 12** folder and save it as: **W12-R3-TutoringRevised**
- If necessary, use the Word Options window to activate the Developer tab in the Ribbon.
- Turn on **Developer**→**Controls**→**Design Mode** .
- Place the insertion point after the colon at the end of the first form line (*Your Name*), tap **[Spacebar]**, and choose **Developer**→**Controls**→**Drop-Down List Content Control** .
- Choose **Developer**→**Controls**→**Properties**  and enter these items as choices for the drop-down list:
 - **Max**
 - **Allison**
 - **Manuel**
 - **Margarita**
 - **Other**

6. Click **OK** to close the Content Control Properties dialog box.
7. Insert a **Rich Text Content Control**  at the end of the next line, remembering to include the space.
8. Insert a **Check Box Content Control**  after the word *Yes* in the next line, remembering to include the space.
9. Turn off **Developer**→**Controls**→**Design Mode** .

Record and Run a Macro

Now you will create a table macro that Kids for Change can use each week to set up the tutoring schedule.

10. Position the insertion point in the blank line at the end of the document.
11. Choose **View**→**Macros**→**Macros**  menu button ▼→**Record Macro**.
12. Name the macro **TutorTable** and verify the Normal template is chosen in the Store Macro In field.

Now you will assign the macro to a keyboard shortcut.

13. Click **Keyboard**.
14. Ensure Macros appears in the left column and then choose the **Normal.NewMacros.TutorTable** macro on the right.
15. Position the insertion point in the **Press New Shortcut Key** field and press **Ctrl**+**8**.

Notice that the shortcut is unassigned.

16. Click **Assign** and then click **Close**.
17. Choose **Insert**→**Tables**→**Table**  and drag in the grid to create a **5x7** table.
The insertion point should be in the first table cell. Macro recording limitations don't allow you to drag the mouse pointer to select cells, so you will use keystrokes.
18. Press **Shift** and tap **→** five times to select the first row.
19. Choose **Table Tools**→**Layout**→**Merge**→**Merge Cells** .
20. Choose **Table Tools**→**Layout**→**Alignment**→**Align Center**  and type: **Weekly Tutoring Schedule**

21. Enter the remaining text, using arrow keys to position the insertion point.

Remember, macro recording limitations don't allow you to position the insertion point with the mouse pointer.

Weekly Tutoring Schedule				
	Max	Allison	Manuel	Margarita
Monday				
Tuesday				
Wednesday				
Thursday				
Friday				

22. Choose **View**→**Macros**→**Macros**  menu button ▼→**Stop Recording**.

Now you will remove the table so you can recreate it with the macro. Nelly is replacing Allison while she is out of town, so you'll make that change to the macro first.

23. Right-click the table and choose **Delete Table**.
24. Choose **View**→**Macros**→**Macros** , make sure the TutorTable macro is chosen, and click **Edit**.

25. Locate Allison's name. (You may need to enlarge the Visual Basic window—Allison is near the bottom.)

```
End With
Selection.MoveRight Unit:=wdCharacter, Count:=5, Extend:=wdExtend
Selection.Cells.Merge
Selection.SelectCell
Selection.ParagraphFormat.Alignment = wdAlignParagraphCenter
Selection.Cells.VerticalAlignment = wdCellAlignVerticalCenter
Selection.TypeText Text:="Weekly Tutoring ScheduleMax"
Selection.MoveRight Unit:=wdCell
Selection.TypeText Text:="Allison"
```

26. Double-click **Allison** to select it and type: **Nelly**
27. Choose **File**→**Close** and return to Microsoft Word.
Now you will run the macro to see your editing changes.
28. If necessary, place the insertion point in the last blank line on the page and then press **Ctrl**+**8** to run the macro.
Notice Nelly's name in the table. Now you will delete the macro.
29. Choose **View**→**Macros**→**Macros** .
30. Make sure the TutorTable macro is selected and click **Delete**; click **Yes** to confirm.
31. Close the Macros dialog box, remove the Developer tab from the Ribbon, and save and close the file.

Apply Your Skills

APPLY YOUR SKILLS: W12-A1

Create a Customer Satisfaction Survey

Your supervisor at Universal Corporate Events has asked you to create a Customer Satisfaction Survey to be distributed to clients. In this exercise, you will create the survey using content controls and then restrict editing.

1. Open **W12-A1-Survey** from your **Word Chapter 12** folder and save it as: **W12-A1-SurveyRevised**
2. Turn on **Design Mode**.
Don't forget to include spaces before each of the content controls you will be creating for this exercise.
3. Add **Rich Text Content Controls** for the first and second form lines, labeled **Name** and **Phone Number**.
4. Add a **Check Box Content Control** at the end of the next line.
5. Add a **Drop-Down List Content Control** at the end of the next line.
6. Using the properties window for the Drop-Down List Content Control, add **Yes** and **No** as list choices.
7. In the first line of the survey, labeled *Staff*, place a **Check Box Content Control** after each of the five listed numbers.

Staff:	5 <input type="checkbox"/>	4 <input type="checkbox"/>	3 <input type="checkbox"/>	2 <input type="checkbox"/>	1 <input type="checkbox"/>
---------------	----------------------------	----------------------------	----------------------------	----------------------------	----------------------------

8. Do the same for the remaining four lines of the survey.
9. Turn off Design Mode and restrict editing in the document to Filling Out Forms, leaving the password boxes blank.
10. Close the Restrict Editing panel, deactivate the Developer tab, and save and close the file.

APPLY YOUR SKILLS: W12-A2

Create a Las Vegas Macro

Universal Corporate Events is preparing a Las Vegas tour for a corporate client. As agents are communicating via email with the travelers, they will paste the macro text into the email as needed. In this exercise, you will create and edit the macro and run it from the Quick Access toolbar.

1. Open **W12-A2-LasVegasMacro** from your **Word Chapter 12** folder and save it as: **W12-A2-LasVegasMacroRevised**
2. Open a new, blank document and then start the macro recorder.
3. Name the macro **LasVegas**, verify the Normal template is chosen, and then click **OK**.
4. Record this text in the blank document: **Upon arrival at the airport, pick up your bags in the luggage area and then look for a limousine driver with a Silicon Tech Group sign. The driver will take you to the MGM Grand where you will stay during your visit.**

5. Stop the macro recorder, tap **Enter**, and test your macro to ensure it runs as expected.
Now you will edit the macro and assign it to a toolbar button.
6. Open the macro editor and locate the word *airport* in the VBA code.
7. Position the insertion point in front of *airport* and type: **Las Vegas** **Spacebar**
8. Close the macro editor and then open the Word Options dialog box.
9. Choose the **Quick Access Toolbar** category and the **Macros** command.
10. Add your macro to the list on the right and click **Modify**.
11. Choose the envelope button and then change the **Display Name** to **Las Vegas** and click **OK** twice.
12. Tap **Enter** and then run the macro from the Quick Access toolbar.
13. Take a screenshot of the document you used to run your macro and then switch to **W12-A2-LasVegasMacroRevised**.
14. Position the insertion point at the bottom of the document and paste the screenshot.
15. Delete the macro and remove the macro button from the Quick Access toolbar.
16. Save and close the file, and then close the other document without saving it.

APPLY YOUR SKILLS: W12-A3

Create a Form for the Corporate Trainer

Universal Corporate Events staff will be holding a software training potluck lunch with the corporate trainer. You've been asked to put together a sign-up form for the event. In this exercise, you will create the form and create and edit a macro.

1. Open **W12-A3-BrownBag** from your **Word Chapter 12** folder and save it as: **W12-A3-BrownBagRevised**
2. Activate the Developer tab and turn on Design Mode.
Don't forget to include spaces before each of the content controls you will be creating for this exercise.
3. At the end of the first form line (*Your Name*) add a **Rich Text Content Control**.
4. Add two **Check Box Content Controls** in the next line, one following *Yes* and the other following *No*.
5. Add a **Drop-Down List Content Control** to the end of the third line.
6. Using the properties window for the Drop-Down List Content Control, add these choices:
 - **Brownies**
 - **Chips**
 - **Cookies**
 - **Crackers**
 - **Dip**
 - **Drinks**
 - **Fruit**
 - **Veggies**
7. Turn off Design Mode.

Create, Run, and Edit a Macro

Now you will create a macro that you will use with another client whose employees will visit the Van Gogh Museum in Amsterdam.

8. Position the insertion point in the blank line at the end of the document.
9. Turn on the macro recorder, name the macro **VanGogh**, and ensure the Normal template is chosen.
10. Click **Keyboard** and assign **Ctrl+7** to the macro.
11. Record this text: **The Van Gogh Museum is open daily from 9 am to 5 pm. It is located at Amstel 51, Amsterdam, and you can get there by boat shuttle or the Hop on, Hop off bus.**
12. Turn off the macro recorder and tap **Enter** to generate a blank line.
13. Use **Ctrl+7** to test the macro.
Now you will enter additional information in the macro.
14. Open the macro editor and locate the word *bus* at the end of the macro text.
15. Position the insertion point after the period following the word *bus* and tap **Spacebar**.
16. Add this text and then close the macro editor: **Be sure to see The Potato Eaters and Starry Night.**
17. Tap **Enter**, test the macro to verify your change, and then delete the macro.
18. Deactivate the Developer tab, save and close the file, and exit Word.

Project Grader

If your class is using eLab (labyrinthelab.com), you may upload your completed Project Grader assignments for automatic grading. You may complete these projects even if your class doesn't use eLab, though you will not be able to upload your work.

PROJECT GRADER: W12-P1

Creating a Customer Survey Form

You've been asked to create a customer survey form for Taylor Games that customer service representatives can use to gather important information during telephone calls. In this exercise, the form you'll create is a prototype that tests out various content controls and uses a macro.

1. Download and open your Project Grader starting file.
 - *Using eLab:* Download **W12_P1_eStart** from the Assignments page. You must start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W12_P1_Start** from your **Word Chapter 12** folder.
2. If necessary, customize the Ribbon to enable the **Developer Tab**, and then enable **Design Mode**.
3. Insert a space after the *Date:* label and insert a **Date Picker Content** control.
4. Insert a space after the *Name:* label and insert a **Plain Text Content** control.
5. Insert a space after the *Age:* label and insert a **Plain Text Content** control.
6. Insert a space after the *Primary Interest:* label and insert a **Drop-Down List Content** control.
7. Add these items to the drop-down list, leaving all other properties for the control set to the default values. The items will appear as both the Display Name and Value:
 - **Books**
 - **Dice**
 - **Games**
8. Insert a space after the *Add to Mailing List?* label and then insert a **Check Box Content** control.
9. Set these properties for the check box control:
 - Title: **Yes**
 - Tag: **Yes**
 - Show As: **Start/End Tag**
10. Insert a space to the right of the check box control and insert another **Check Box Content** control.
11. Set these properties for the second check box control:
 - Title: **No**
 - Tag: **No**
 - Show As: **Start/End Tag**
12. Position the insertion point to the right of the *Comments:* label and record a macro using these guidelines:
 - Macro name: **NoComments**
 - Assign Macro To: Keyboard using the shortcut: **Alt+Ctrl+N**
 - Save Changes In: **W12_P1_eStart** or **W12_P1_Start** if you aren't using eLab.

- Assign the macro and then type an empty space followed by this text: **Customer had no comments**
- Stop recording the macro.

13. Use these guidelines to test your controls and the macro:

- Use the **Date Picker** control to enter today's date.
- Enter any name and age in the Name and Age controls.
- Select any of the choices in the Primary Interest control. The control should display *Books*, *Dice*, and *Games*.
- Choose either the **Yes** or **No Mailing List** option.
- Delete the **Customer had no comments** text from the Comments field and use your macro to reenter the text.

Note!

In the next step it is important that you save the document as a Word Macro-Enabled Document type.

14. Save your form as a macro-enabled document.

- *Using eLab:* Save it as a Word Macro-Enabled Document (.docm) to your **Word Chapter 12** folder as **W12_P1_eSubmission** and attach the file to your eLab assignment for grading.
- *Not using eLab:* Save it as a Word Macro-Enabled Document (.docm) to your **Word Chapter 12** folder as: **W12_P1_Submission**

PROJECT GRADER: W12-P2

Using Content Controls and a Macro in a Business Letter

You've been asked by the Classic Cars Club to send registration follow-up letters to vendors attending the national car show. In this exercise, you will create a letter containing content controls and a macro to individualize and expedite the letter-creation process.

1. Download and open your Project Grader starting file:
 - *Using eLab:* Download **W12_P2_eStart** from the Assignments page. You *must* start with this file or your work cannot be automatically graded.
 - *Not using eLab:* Open **W12_P2_Start** from your **Word Chapter 12** folder.
2. If necessary, customize the Ribbon to enable the **Developer Tab**, and then enable **Design Mode**.
3. Replace the word *DATE* at the top of the letter with a **Date Picker Content Control**. When replacing the word *DATE*, do not remove any of the paragraph marks so that the same spacing is maintained between the logo above the date and the name *David Roberts* below it.
4. Use these guidelines to insert a content control in the first sentence of the large main paragraph:
 - Replace the word *DROPDOWN* with a **Drop-Down List Content Control**.
 - Maintain the spacing of one empty space before and after the content control.
5. Add these items to the drop-down list, leaving all other properties for the control set to the default values. The items will appear as both the Display Name and Value:
 - **5x5 Booth**
 - **10x10 Booth**
 - **Hallway Booth**
 - **Main Floor Booth**

6. Insert a space after the *Mailing List Purchase:* label and then insert a **Check Box Content Control**.
7. Set these properties for the check box control:
 - Title: **Yes**
 - Tag: **Yes**
 - Show As: **Start/End Tag**
8. Insert a space to the right of the check box control and insert another **Check Box Content Control**.
9. Set these properties for the second check box control:
 - Title: **No**
 - Tag: **No**
 - Show As: **Start/End Tag**
10. Insert the same checkbox controls that were created in steps 6–9 next to the *Setup and Tear Down Assistance:* and *Premier Sponsorship Package:* labels.
11. Position the insertion point on the last empty paragraph in the document and record a macro using these guidelines:
 - Macro name: **EarlyBird**
 - Assign Macro To: **Keyboard** using the shortcut: **Alt+Ctrl+E**
 - Save Changes In: **W12_P2_eStart** or **W12_P2_Start** if you aren't using eLab.
 - Assign the macro and type this text in the empty paragraph: **Congratulations! Your Early Bird Registration earned you a 25% discount on your next show!**
 - Stop recording the macro.
12. Use these guidelines to test your controls and the macro:
 - Use the **Date Picker** control to enter today's date.
 - Choose any of the items in the Drop-Down control.
 - Choose **Yes** or **No** in the three sets of Check Box controls.
 - Delete the paragraph you typed while recording the macro (begins with *Congratulations*).
 - Use your macro to reenter the *Congratulations* paragraph in the last empty paragraph.

Note!

In the next step, it is important that you save the document as a Word Macro-Enabled Document type.

13. Save your letter as a macro enabled document.
 - *Using eLab:* Save it as a Word Macro-Enabled Document (.docm) to your **Word Chapter 12** folder as **W12_P2_eSubmission** and attach the file to your eLab assignment for grading.
 - *Not using eLab:* Save it as a Word Macro-Enabled Document (.docm) to your **Word Chapter 12** folder as: **W12_P2_Submission**

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W12-E1 That's the Way I See It

As the owner of a small business, you know it's essential to stay ahead of the latest trends so you can anticipate your customers' needs. You've decided to create an interest form to distribute to your customers in order to better understand what they are looking for. Create a new document named:

W12-E1-InterestForm

Add at least five questions to the form, inquiring about which of the latest trends your customers may be interested in. You may decide the subject matter for yourself. Add at least one rich text, one date picker, one check box, and one drop-down list (with choices) content control. Save the document. Remember to turn off the Developer tab and, if you wish, delete any macros created.

W12-E2 Be Your Own Boss

As an administrator at Blue Jean Landscaping, you have found that macros can greatly increase efficiency. You want to create a macro that will rapidly create a letterhead, with the added benefit of avoiding printing costs. Create a new document named: **W12-E2-BJLetterhead**

Record a new macro named **Letterhead** and store it in the Normal template. As part of the macro, type **Blue Jean Landscaping** as the company name and make up the rest of the letterhead content before stopping the recording. Delete the text you used to create the macro and then test it. Delete the letterhead text and then edit the macro to add a comma, **[Spacebar]**, and **Inc.** at the end of the company name. Test the macro again; if it runs as intended, save the document. Remember to turn off the Developer tab and, if you wish, delete any macros created.

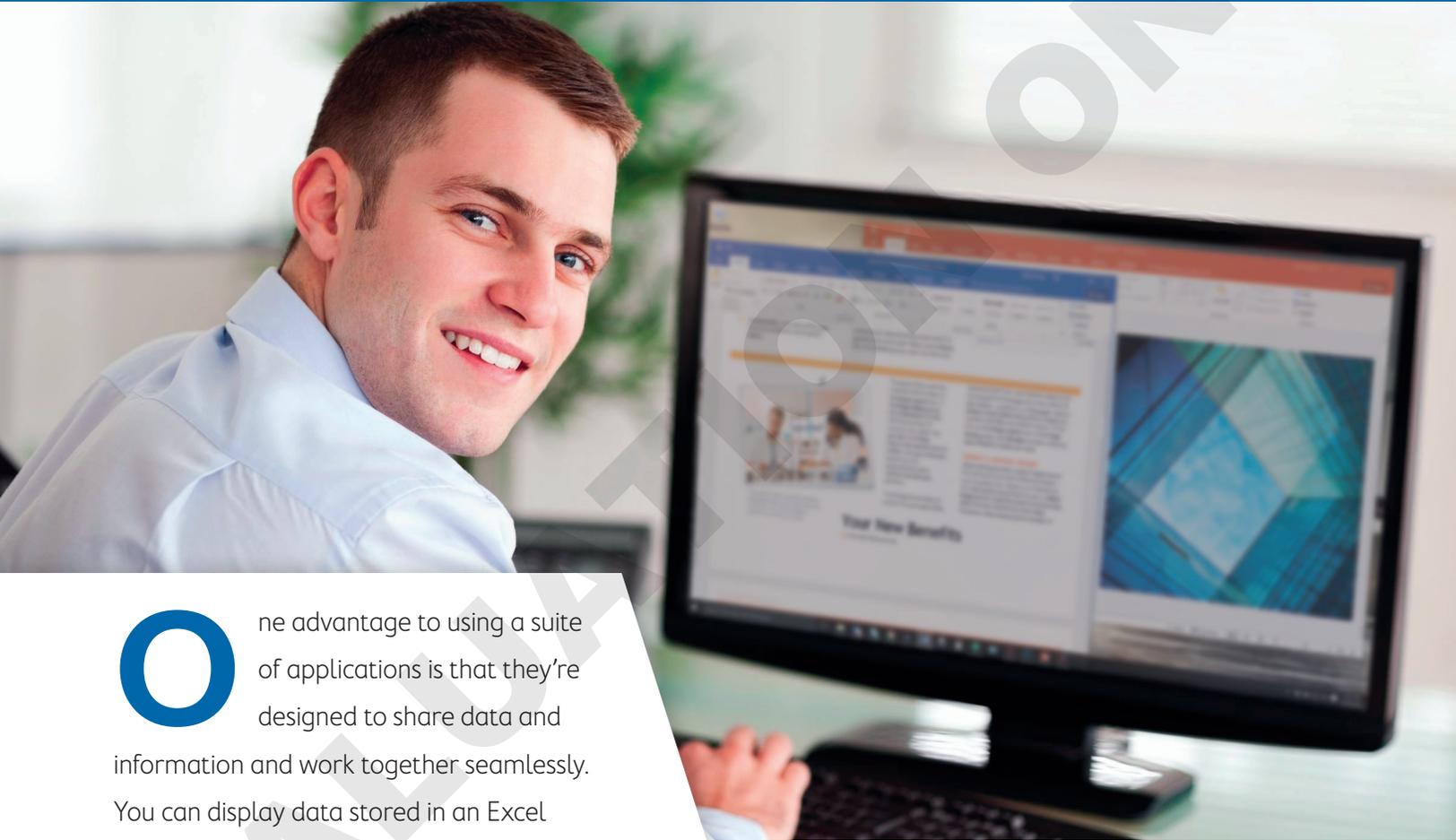
W12-E3 Demonstrate Proficiency

The owner of Stormy BBQ has asked you to show him a little more about how to create forms in Word, something he briefly learned about in a Microsoft Word class. You think he would also love macros. Put together a simple online order form with at least one date picker, one check box, and one drop-down list (with choices) content control. Then, think of three different types of Word documents you use at Stormy BBQ and write a few paragraphs at the bottom of your form suggesting at least one macro for each document type. Don't forget to explain why each macro would make creating the document more efficient. Save your file as: **W12-E3-EfficientStormy** and remember to turn off the Developer tab and, if you wish, delete any macros created.

WORD

13

Integrating Word with Excel, PowerPoint, and the Web



One advantage to using a suite of applications is that they're designed to share data and information and work together seamlessly. You can display data stored in an Excel worksheet in a Word document or use Excel data as the source document in Mail Merge. You can send a Word outline to PowerPoint to create a new presentation or insert a PowerPoint presentation in a Word document. You can open a PDF file in Word and edit it, and you can convert a Word document to a web page. In this chapter, you will explore the features that allow Word to interact with other Office programs.

LEARNING OBJECTIVES

- ▶ Embed and link Excel objects in Word
- ▶ Use an Excel worksheet as a Mail Merge data file
- ▶ Create PowerPoint presentations from Word outlines
- ▶ Insert PowerPoint presentations in Word documents
- ▶ Open a PDF file in Word for editing
- ▶ Convert Word documents to web pages

Project: Multitasking with Word, Excel, and PowerPoint

You are an administrative assistant at Raritan Clinic East. An advisory committee meets quarterly to review the budget and clinic activities. In preparation for the upcoming meeting, you will help create the quarterly expense report. The data is in an Excel worksheet, so you will use the Excel data in the report that you will prepare in Word. You will add the chart contained in the Excel file to the report and prepare a PowerPoint presentation using an outline of headings from the clinic's Annual Report. You will generate a letter to all committee members using an Excel name and address file to address the letters. Then you will edit a press release in Word that was saved in PDF format. Finally, you will save your report as a single file web page for posting on the clinic website for others to review.

Embedding and Linking Excel Objects

You can share data and objects among the programs in the Office 2019 suite. **Object** is a term for an element that you share between files. For example, you can place data and chart objects from an Excel file in a Word document. You **embed** an object if you don't want it to change when the original **source file** is updated. On the other hand, if you want the Word document to stay current with any changes in the source file, you **link** the object to its original file, so your document will be updated when the source file is modified.

Linking or Embedding Data

Whether you are embedding or linking to files, there are two techniques for inserting data from other files:

- ▶ **Copy/Paste:** Using this procedure, you copy data from a source document, such as an Excel worksheet, and paste it directly into the Word document. Using Paste Special, you can link the data (or not) at the time you paste it. This method is useful when you want to include only a portion of the file.
- ▶ **Insert Object:** You can insert a file, such as an Excel workbook, from within Word, and you can choose to link the data at the time you insert it. This procedure is useful when you want to include an entire file in a document.

DEVELOP YOUR SKILLS: W13-D1

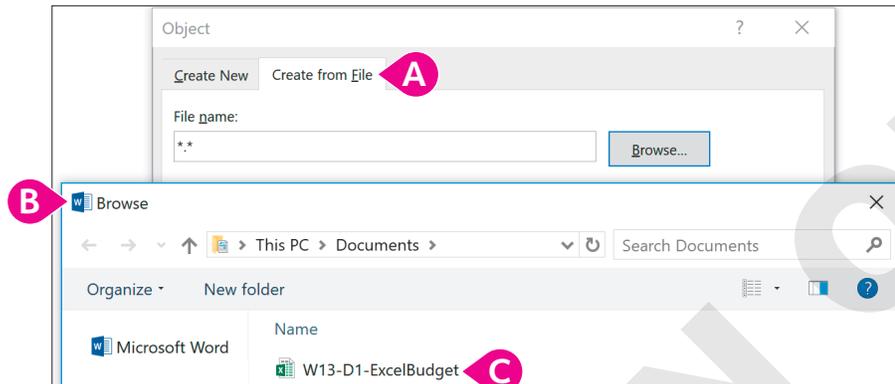
In this exercise, you will embed an Excel worksheet in a Word document and test its static nature.

1. Start Word, create a blank document, and save it to your **Word Chapter 13** folder as:
W13-D1-BudgetRpt
2. Type these heading lines:
Advisory Committee Budget Report
Third Quarter
3. Tap **Enter** and then select both heading lines.
4. Choose **Home**→**Styles**→**More**  on the Quick Styles gallery and choose **Title**.

- Position the insertion point in the blank line below the heading lines and type this introductory paragraph:

This report, produced by clinic staff, is in keeping with the Advisory Committee’s decision to conduct quarterly reviews of the current year’s budget. It provides a snapshot of expenses for the quarter and for the year-to-date.

- Tap **Enter** and then choose **Insert**→**Text**→**Object**.
- Follow these steps to identify the Excel file from which to embed the data:



- Click the **Create from File** tab.
- Click **Browse** and navigate to your **Word Chapter 13** folder.
- Double-click **W13-D1-ExcelBudget** and click **OK**.

Modify the Source File

- Start Excel, open **W13-D1-ExcelBudget**, and save it in your **Word Chapter 13** folder as: **W13-D1-ExcelBudgetRevised**
- Follow these steps to edit a value in the source file:

	A	B
1	Rarit	
2	Bu	
3		Q1
4	Mortgage & Insurance	14,557
5	Utilities	15,201

- Click the cell for **14,557** (Q1, Mortgage & Insurance) and tap **Delete**.
 - Type **10,000** and tap **Enter**.
- Switch to Word and verify the value of Q1 Mortgage & Insurance remains 14,557.
Because the table is embedded (not linked) in the document, the data in Word is not affected by changes made to the Excel file.
 - Switch back to Excel and click **Undo** twice to return the value to its original amount.
Because you want the report to reflect the most recent data in the worksheet, you will delete the embedded object. You'll link to the data later.
 - Switch back to Word, select the embedded worksheet, and tap **Delete**.
 - Save the Word file and leave all files open.

Linking Objects

When you link data from another application, such as Excel or PowerPoint, to a Word document, the original information resides in Excel or PowerPoint. This is known as the source file because it is the source of the data. When you place the information (object) in a Word document, it becomes the **destination file**. By linking source files with Word documents, you create a dynamic tie between the two files.

For example, you might start working on a quarterly report before the end of the quarter and, if there's a linked chart in the report, it updates with the current information as the numbers change in Excel. That way, updates are centralized, and you don't have to keep track of making changes in two places.

Note!

Renaming the source file or moving it to another file location will break the link.



View the video "Inserting a Linked Object."

To link a range of cells or a chart from Excel rather than the entire file, you can copy just that content to the Clipboard and then use the Paste Special command in Word.



View the video "Link an Object with Paste Special."

When pasting objects, multiple options are available, including the option to link the pasted object. Using the Paste Options smart tag, you can link objects to their original files.



View the video "Link an Object with the Paste Options Smart Tag."

Insert→Text→Object→Create from File→Link to File

DEVELOP YOUR SKILLS: W13-D2

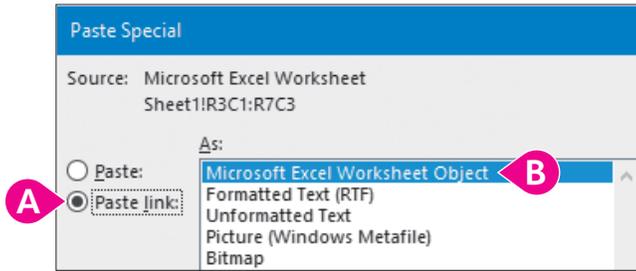
In this exercise, you will link Excel data to a Word document using Paste Special. You will then modify the Excel worksheet and observe how the changes update the Word document. Then you will link an Excel chart to the document using the Paste Options smart tag.

1. Save your file as: **W13-D2-BudgetRpt**
2. Switch to Excel and follow these steps to select and copy the Excel data:

Raritan Clinic East					
Budget Summary					
	Q1	Q2	Q3	Q4	Totals
Mortgage & Insurance	14,557	14,557	14,557		43,671
Utilities	15,201	18,200	21,000		54,401
Food	5,480	4,512	3,452		13,444
Staff Salaries	87,685	87,685	87,685		263,055
Maintenance & Repairs	16,982	17,458	15,225		49,665
Fundraising for Donations	820	2,006	67,325		70,151
Grand Totals	140,725	144,418	209,244	-	494,387

- A Click in the merged cell containing the heading *Raritan Clinic East*.
- B Press **[Shift]**, click the last cell in the worksheet (494,387), and choose **Home→Clipboard→Copy**.

3. Switch to Word and, if necessary, position the insertion point at the end of the document.
4. Choose **Home**→**Clipboard**→**Paste menu button** ▼→**Paste Special**.
5. Follow these steps to paste the object:



- A Choose **Paste Link**.
- B Choose **Microsoft Excel Worksheet Object** and click **OK**.

Now you will edit the worksheet and observe the change to the linked object in Word.

6. Switch to Excel and tap **[Esc]** to remove the marquee (animated dashed line) surrounding the table.
7. Click **cell E4**, which is the Q4 cell for Mortgage & Insurance.
8. Type the Q4 projections, tapping **[Enter]** after typing each number.

The formulas in the Grand Totals and Totals cells automatically update as you enter the data.

Q4
11,337
1,750
4,975
17,685
2,543
1,529

9. Switch to Word.

The linked table is updated with the additions you made in the Q4 column. If the Excel table failed to update on your computer, right-click the Excel object and choose Update Link.

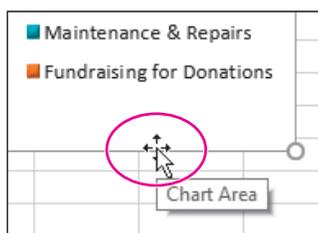
10. Position the insertion point at the end of the document and tap **[Enter]** three times.

Link an Excel Chart in Word

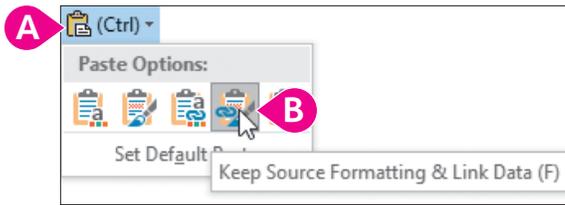
Now you will use the Paste Options smart tag to link a chart to Word.

11. Switch to Excel, click the **Sheet 2** tab at the bottom of the Excel window, and click the **pie chart border** once to select it.

The mouse pointer becomes a four-headed arrow, and the selection handles appear in the border.



12. Choose **Home**→**Clipboard**→**Copy**  and then switch back to Word.
13. Choose **Home**→**Clipboard**→**Paste** .
14. Follow these steps to paste a link for the chart object:



- A Click the **Paste Options** smart tag at the bottom of the chart.
 - B Click **Keep Source Formatting & Link Data**.
15. Save the Word file. Exit Excel, saving changes when prompted.

Opening Excel and Chart Tools from Word

When data or objects from other sources are linked to Word documents, you can open source program tools directly from the Word document and use the tools to edit the object. Or, you can open the Excel application from within Word.

DEVELOP YOUR SKILLS: W13-D3

In this exercise, you will launch Excel from within Word and edit data in the worksheet. Then you will use Live Preview with Excel Chart Tools on the Word Ribbon to view potential formatting changes.

1. Save your file as: **W13-D3-BudgetRpt**
2. Double-click anywhere in the Excel worksheet table object to open the Excel file.
At this stage, you can make editing changes that will be reflected in the Word document.
3. In Excel, click **cell B7**, the Q1 cell for Staff Salaries, and then type **1,000** and tap **Enter**.
4. Switch to Word and ensure the data and chart both updated.
If your table failed to update, right-click the Excel worksheet table and choose Update Link from the menu. It's possible the worksheet table will update but not the chart. If your chart failed to update, double-click the chart and from the Ribbon choose Chart Tools→Design→Data→Refresh Data.
5. Switch to Excel and click **Undo** on the Quick Access toolbar.
6. Switch to Word.
The chart and worksheet data update to their original values. If your table failed to update, right-click the Excel worksheet table and choose Update Link. If your chart failed to update, double-click the chart and choose Chart Tools→Design→Data→Refresh Data.
7. If you didn't use Chart Tools in the previous step, double-click the chart to display the Chart Tools on the Ribbon.

8. Click the border of the chart to select the chart background.
You should not see handles on objects within the border.
9. Choose **Chart Tools**→**Format**→**Shape Styles**→**Shape Fill**  **menu button** ▼.
10. Hover the mouse pointer over several colors to see Live Preview display the effects as they impact the chart area background color.
11. Tap **[Esc]** to close the gallery and then tap **[Esc]** again to deselect the chart.
The Chart Tools tabs disappear from the Ribbon.
12. Save and close the Word file but leave the Excel file open.

Updating and Breaking Links

Linked objects in Word automatically update if the destination file is open at the time the source document changes. Naturally, the destination file is not always open when you modify the Excel source document; however, Word will prompt you to update links when you open a document containing links.

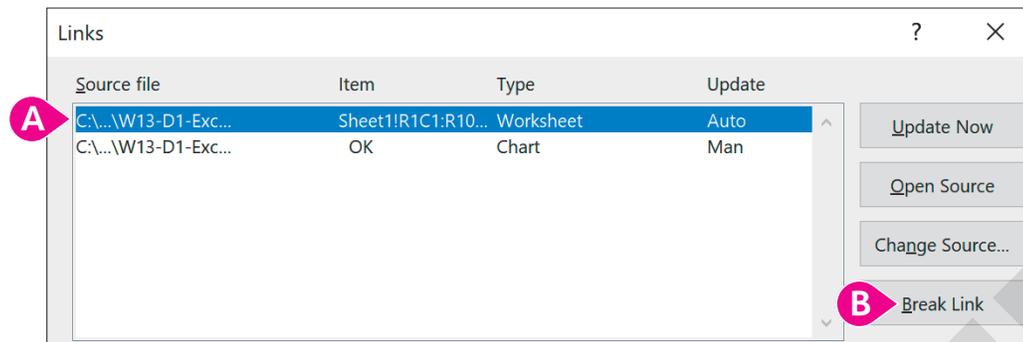
You can break the link between a linked object and its source document without affecting the source document. For example, once the final figures for a period are in, you may want to break the link between Word and Excel so the linked object is converted to an embedded object. Then, the Word report always reflects the closing numbers for that period.

DEVELOP YOUR SKILLS: W13-D4

In this exercise, you will modify the linked Excel file and observe the prompt to update links when you open the Word document. Then you will break the links to the worksheet data and test to see that the links are broken.

1. In Excel, click **cell C4** (Mortgage & Insurance for Q2) and then type **50,000** and tap **[Enter]**.
You entered an overly large number so the changes in the associated worksheet table and chart will be easy to see.
2. Open **W13-D3-BudgetRpt**, which contains the linked objects.
3. When the message appears prompting you to update links, click **Yes**.
Observe the change in the worksheet data and in the chart. If your table failed to update, right-click the Excel worksheet table and choose Update Link. If your chart failed to update, click the chart border and choose Chart Tools→Design→Data→Refresh Data.
4. Save the Word file as: **W13-D4-BudgetRpt**
Now you will break the link between the objects in Word and the Excel file.
5. In Word, right-click in the worksheet data to display a pop-up menu.
6. Choose **Linked Worksheet Object** and then choose **Links**.

7. Follow these steps to break the link for the table:



- A** Make sure the worksheet object is selected.
- B** Click **Break Link**.
8. When the message appears asking if you want to break the link, click **Yes**.
The link disappears from the Links dialog box. The remaining link is already highlighted.
9. Click **Break Link** to break the link between Excel and the chart.
10. When the message box appears, click **Yes**.
The Source File now displays the term NULL, indicating there is no source file attached.
11. Click **OK** to close the Links dialog box.
Now you will test to see that the links are broken.
12. Right-click the worksheet object, review the menu options, and note that the Update Link option is gone.
13. Double-click the chart, choose **Chart Tools**→**Design**→**Data**, and notice the Refresh Data button is grayed out, indicating the link is broken.
14. Save and close the Word and Excel files but leave the program windows open.

Using Excel as a Mail Merge Data Source

You may recall that Word's Mail Merge feature is most often used for generating personalized form letters. Word can use a variety of file types as data sources, including Excel files. Whether you type a new data-source list from within Word or create your data source in Excel, the rules for effective data sources apply.

The more data is split into small segments, the more flexibility you have in the merge. Remember that you cannot merge part of a field. For example, if the name field contains the title, first name, and last name, you will not be able to use those elements separately. For instance, in the greeting line, you will not be able to drop the first name and use Dear Title Last Name.

In Excel, the columns are treated as separate fields in a mail merge. Therefore, in a name and address list, it is a good idea to place the title, first name, and last name in separate columns, as shown in the following illustration:

	A	B	C	D	E	F	G
1	Title	First Name	Last Name	Address	City	State	Zip
2	Ms.	Sally	Redding	756 Locust Street	Los Angeles	CA	91025
3	Mr.	Jose	Lopez	7812 Olive Road	Los Angeles	CA	91357
4	Mr.	Charles	Douglas	91 Sycamore Ave.	Los Angeles	CA	91642

Note!

When an Excel worksheet is used as a merge data source file, the first row must contain the field names. Also, all columns and rows must be adjacent to each other for Mail Merge to identify all entries as part of the same data source. You cannot have blank rows and columns within the Excel worksheet data.

 Mailings→Start Mail Merge→Select Recipients→Use an Existing List

DEVELOP YOUR SKILLS: W13-D5

In this exercise, you will begin by examining the Excel worksheet that you will use as the data source. Next you will open a letter and designate it as the main document. Then you will connect the Excel data source to the letter and conduct the merge.

- In Excel, open **W13-D5-CommAddress** from your **Word Chapter 13** folder.
Each column represents a mail merge field. Title is a field, First Name is a field, and so forth.
- Look at the bottom of the Excel worksheet and notice the tab labeled *Sheet 1*.
This is the name of the page in the Excel workbook that contains the address list. You will see Sheet 1 again later in this exercise.
- Exit Excel.
- In Word, open **W13-D5-CommLtr** and save it as: **W13-D5-CommLtrRevised**
- Choose **Mailings→Start Mail Merge→Start Mail Merge**  and then choose **Letters**.
This designates the letter as the main document.
- If necessary, display formatting marks.
Being able to see the formatting marks will be helpful later in this exercise. Now you will connect to the Excel data source.
- Choose **Mailings→Start Mail Merge→Select Recipients**  and then choose **Use an Existing List**.
- Navigate to your **Word Chapter 13** folder and open **W13-D5-CommAddress**.
- In the Select Table dialog box, notice that *Sheet 1* is highlighted.
Earlier you observed Sheet 1 as the name of the page in the Excel workbook that contains the address list.

10. Click **OK**.
11. In the letter, select the **Today's Date** text; delete it, but don't delete the paragraph symbol at the end of the line.
Deleting the paragraph symbol would throw off proper business letter spacing.
12. Type the current date in its place.

Insert Merge Codes

13. Select and delete the **Address Block** text, but don't delete the paragraph symbol at the end of the line.
14. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
15. When the Insert Address Block dialog box appears, click **OK** to accept the default settings for the inside address.
16. Delete the **Greeting Line** text but not the paragraph symbol at the end of the line.
17. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line** .
18. When the Insert Greeting Line dialog box appears, change the Greeting Line Format from a comma to a colon and click **OK**.

Conduct the Merge

19. Choose **Mailings**→**Finish**→**Finish & Merge**  and then choose **Edit Individual Documents**.
 20. In the Merge to New Document dialog box, click **OK** to merge all records from the Excel file.
 21. Turn off formatting marks and scroll through the letters to see the results.
 22. Close the merge document without saving it.
 23. Save and close **W13-D5-CommLtrRevised**.
-

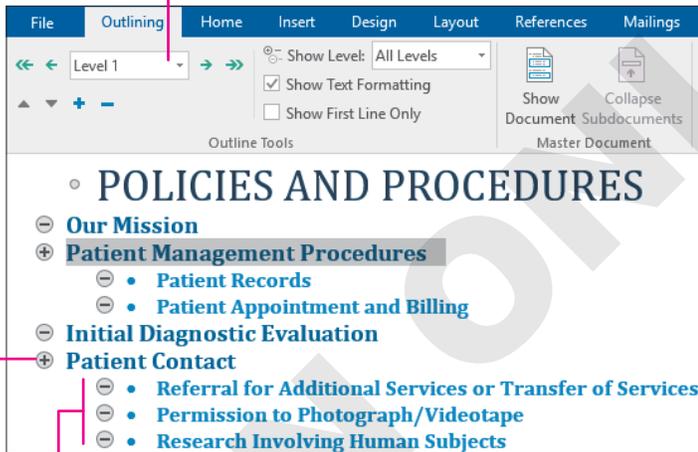
Integrating Word with PowerPoint

PowerPoint is another program that Word can share files with. Word outlines can be used to create PowerPoint presentations. This hierarchical structure uses Heading 1 topics as the slide's title, and it uses headings such as Heading 2, Heading 3, and so forth as the bullet and sub-bullet entries in the slide.

Using Word Outline View

The following illustration is an example of an outline created specifically for generating a PowerPoint presentation. Clicking or selecting entries in the outline displays the Word heading level in the Outlining tab on the Ribbon.

This field displays the Word heading style level of the highlighted heading.



The plus (+) symbol indicates that there are lower-level headings below this heading.

Minus (-) symbols indicate that there are no lower-level headings below this heading.

The screenshot shows the 'Outlining' ribbon with the following elements:

- Level 1** dropdown menu.
- Show Level:** All Levels.
- Show Text Formatting**.
- Show First Line Only**.
- Show Document** and **Collapse Subdocuments** buttons.
- Master Document** button.
- Outline Tools** section.
- POLICIES AND PROCEDURES** (Level 1 heading, plus symbol).
- Our Mission** (Level 2 heading, minus symbol).
- Patient Management Procedures** (Level 2 heading, plus symbol).
 - Patient Records** (Level 3 heading, minus symbol).
 - Patient Appointment and Billing** (Level 3 heading, minus symbol).
- Initial Diagnostic Evaluation** (Level 2 heading, minus symbol).
- Patient Contact** (Level 2 heading, plus symbol).
 - Referral for Additional Services or Transfer of Services** (Level 3 heading, minus symbol).
 - Permission to Photograph/Videotape** (Level 3 heading, minus symbol).
 - Research Involving Human Subjects** (Level 3 heading, minus symbol).

Although you can use an existing document that contains Word headings to create a PowerPoint presentation, PowerPoint cannot extract body text from a document, so if you use an existing document with body text in addition to the headings, you will have to edit the PowerPoint presentation accordingly.

The procedures used to launch PowerPoint are the same as those used to launch Word. No special knowledge of PowerPoint is required to complete the following exercise.

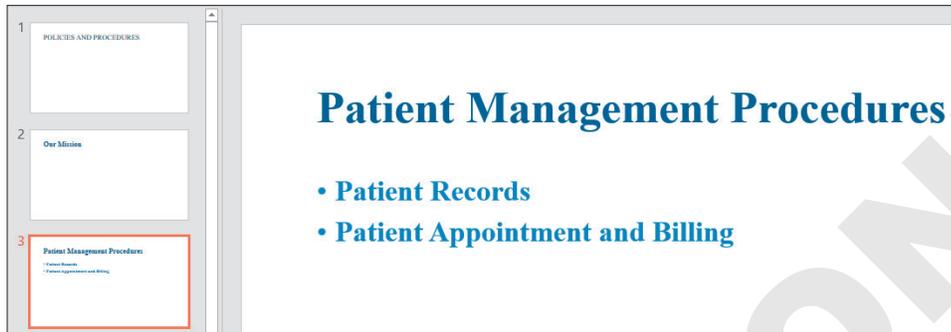
☰ View→Views→Outline

DEVELOP YOUR SKILLS: W13-D6

In this exercise, you will use a Word outline to create a PowerPoint presentation. Then you will observe how the different heading levels are displayed in the presentation.

1. Open **W13-D6-ProcOutline** from your **Word Chapter 13** folder.
2. Choose **View→Views→Outline** .
3. Click several entries in the outline and notice the Word heading level indicated on the Ribbon.
4. Close the document and start PowerPoint.
5. Click the **Blank Presentation** template on the PowerPoint Start screen.

6. Choose **File**→**Open** and navigate to your **Word Chapter 13** folder.
7. In the bottom-right corner of the Open dialog box, click the file type drop-down list and choose **All Files**.
8. Double-click **W13-D6-ProcOutline** to open it.
9. Click the **third slide** in the panel on the left to display the slide in the main window.



This title was formatted using the Heading 1 style, and the bullet points were formatted using the Heading 2 style.

10. Exit PowerPoint without saving the file.

Adding a PowerPoint Presentation to a Word Document

When you create a document that will be distributed electronically, it could be useful to include a PowerPoint presentation within the document. For example, suppose you want to distribute a presentation and include a letter with it. You can create the letter and place the presentation in the body of the letter.

Note!

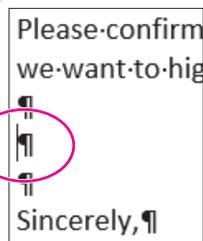
When you insert a presentation into a Word document, only the first slide appears in the document. Double-clicking the slide image plays the show automatically.

Insert→Text→Object→Create from File

DEVELOP YOUR SKILLS: W13-D7

In this exercise, you will insert a presentation into the letter being sent to board members.

1. Open **W13-D7-AdvisoryLtr** from your **Word Chapter 13** folder and save it as: **W13-D7-AdvisoryLtrRevised**
2. Turn on formatting marks and then position the insertion point before the middle paragraph symbol.



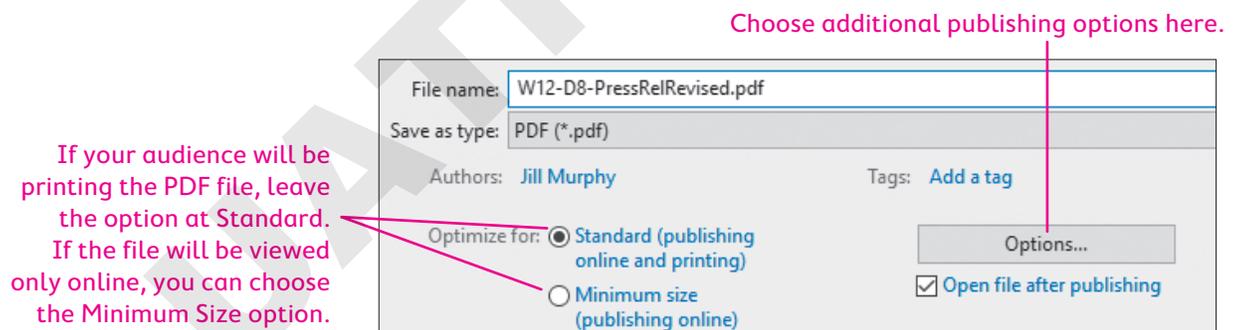
3. Choose **Insert**→**Text**→**Object**  and click the **Create from File** tab.
4. Click **Browse** and navigate to your **Word Chapter 13** folder.

5. Double-click **W13-D7-IntroToRCE** (a PowerPoint file) and then click **OK**.
Word adds a picture of the first slide to the letter. Notice that the image makes the letter extend to two pages. Next you will size the image so that the letter fits on one page.
6. Click the slide image to display the sizing handles.
7. Drag the lower-right sizing handle diagonally up toward the center of the image until the letter fits on one page.
8. Double-click the slide image in the letter to start the slide show.
9. Click the mouse pointer anywhere on the screen to advance the slides.
10. When the black screen appears at the end of the show, click one more time to close it.
11. Save and close the file.

Opening, Editing, and Saving a PDF File

PDF files are popular, thanks to their reduced file size and editing restrictions. You can open, edit, and save a PDF file in Word 2019 without purchasing and learning separate, and often expensive, editing software. After editing the file, you can save it as a Word or PDF file. The file you open is considered a read-only file, so you must save it under a different name.

When you save a PDF file, you can optimize it based on how your audience will likely read it. The Options button lets you choose additional options, such as the range of pages you want to save and the ability to create bookmarks in the PDF file.



DEVELOP YOUR SKILLS: W13-D8

In this exercise, you will open a PDF file in Word and make editing changes. You will then resave the file as a PDF.

1. Choose **File**→**Open**, navigate to your **Word Chapter 13** folder, and open **W13-D8-PressRel**.
2. Read the message and then click **OK**.

The PDF file opens with all the Word editing and formatting tools available.

Note!

When you open a PDF file in Word, there may be formatting issues. Don't worry about that now. Concentrate on learning how to open and edit a PDF file for which you don't have the original Word file.

3. Select the three lines at the top of the page.

4. Choose **Home**→**Font**→**Font Color**  menu button ▼ and choose **Blue, Accent 1, Darker 25%**.
5. Choose **Home**→**Font**→**Font Size** and choose **16 pt**.
6. Choose **File**→**Save As**, navigate to your **Word Chapter 13** folder, save the file as **W13-D8-PressRelRevised** and choose **PDF** from the Save as Type list, and then click **Save**.
7. If the PDF file opens in a PDF reader, close the PDF window.
Remember, the original file is read-only, so saving it under a different name saved the changes in a new file.
8. The original file is still open in Word; close the file without saving.

Creating Web Pages from Word Documents

You can create web pages from Word documents. As you might imagine, this saves you from needing to learn a more specialized web design or coding program. Another advantage is that Word can display a document in Web Layout view so you can make edits before posting the file on the web.

Formatting Web Pages

Web pages are often set up in tables to help align text in multiple columns, and the Table feature works well for this purpose. When you save a document as a web page, Word converts it to hypertext markup language (HTML), the authoring language for web pages. When you convert a document to HTML, some formatting features may be lost. However, most of your documents should translate cleanly into attractive web pages. Saving your files as a single file web page may help to reduce these transition errors.

Using Alternative Text in Web Pages

If a person uses a screen reader while viewing a web page, alternative text appears and is read aloud when hovering the mouse pointer over a picture or graphic. Some users won't see the text, but they'll hear it.

DEVELOP YOUR SKILLS: W13-D9

In this exercise, you will save a document as a single file web page and examine its format. You will also add alternative text to a picture in the document.

1. Open **W13-D9-RCEWalk** from your **Word Chapter 13** folder and save it as: **W13-D9-RCEWalkRevised**
2. If no gridlines appear, choose **Table Tools**→**Layout**→**Table**→**View Gridlines**.
The document is set up in a table. Gridlines are visible so you can see the column with no content on the left side of the table. Web pages may appear too far to the left in a browser window, so the blank column is acting as a spacer to position the content farther to the right.
Now you will add alternative text to the picture.
3. Click the picture and choose **Picture Tools**→**Format**→**Accessibility**→**Alt Text**.
4. In the Alt Text box, remove any text that appears and then type:
Amy Chambers  **President, Raritan Clinic East**

5. Close the Alt Text task pane.
6. Choose **File**→**Save As** and navigate to your **Word Chapter 13** folder.
7. Choose **Single File Web Page** from the Save as Type drop-down list.
Choosing Single File Web Page from the list will cause a Change Title button to appear below.
8. Click **Change Title** to open the Enter Text dialog box.
9. Type **RCE Walkathon** in the Page Title field and click **OK**; click **Save**.
10. Open the Windows File Explorer, navigate to your **Word Chapter 13** folder, and double-click the MHTML version of **W13-D9-RCEWalkRevised** to open the file in your browser.
Look closely, and you will see that the MHTML file's icon is very different from the Word file's icon. If the file doesn't seem to open properly in your default browser, right-click on it and choose Open with to try a different browser.
11. Review the document layout and notice the gridlines do not appear in the browser.
12. Close the browser and the Word web page file.

Editing Web Pages in Word

When you create a web page in Word, you can use Word to edit the page. You open the *.htm* page from within Word, make the necessary changes, and then resave the file. When you open it in the browser again, you will see the changes that you made.

DEVELOP YOUR SKILLS: W13-D10

In this exercise, you will open the single file web page you created in the previous exercise and edit it. Then you will reopen the page in your browser and observe the change.

1. Open **W13-D9-RCEWalkRevised.htm**.
2. Change the walkathon date from March 1 to: March **8**
3. Save and close the file, and then restart your browser.
Steps for opening the file in your default browser may vary slightly. You may need to seek assistance to determine the correct method.
4. Press **Ctrl**+**O** and navigate to your **Word Chapter 13** folder.
5. Double-click **W13-D9-RCEWalkRevised.htm** and click **OK**.
6. Observe the date change you made in the web page.
7. Close your browser and exit Word.

Self-Assessment



Check your knowledge of this chapter's key concepts and skills using the Self-Assessment in your ebook or online (eLab course or Student Resource Center).

Reinforce Your Skills

REINFORCE YOUR SKILLS: W13-R1

Create a Consignment Shop Sales Report

Kids for Change operates a fundraising consignment shop, Collectibles & Curiosities. In this exercise, you will prepare a static sales report and distribute it to the board members. Then you will link the sales report data so you can start collecting data for your year-to-date report.

1. Start Word, open **W13-R1-Q1SalesRpt** from your **Word Chapter 13** folder, and save it as: **W13-R1-Q1SalesRptRevised**
2. Position the insertion point in the first blank line below the paragraph.
3. If necessary, choose **View**→**Views**→**Print Layout**  to change the view.
4. If necessary, turn on formatting marks, choose **Insert**→**Text**→**Object** , and click the **Create from File** tab.
5. Click **Browse**, navigate to your **Word Chapter 13** folder, and double-click **W13-R1-Collectibles**.
Because you are embedding (not linking) the data in Word, you won't check the Link to File checkbox.
6. Click **OK** to close the dialog box and insert the table.
Having distributed this report to the board members, you will now link this worksheet table in the Word document so you can begin collecting year-to-date data.
7. Click the embedded worksheet table and tap **Delete**.

Link Excel Data to a Word Document

8. Start Excel, click the **Open Other Workbooks** link at the bottom of the Recent list on the left of the Start screen, and navigate to your **Word Chapter 13** folder.
9. Open **W13-R1-Collectibles** and save it as: **W13-R1-CollectiblesRevised**
10. Make sure the *Collectibles and Curiosities* merged cell is selected and then press **Shift** and click the last cell in the table (contains a value of \$1,464.00).
11. Choose **Home**→**Clipboard**→**Copy**, switch to Word, and, if necessary, position the insertion point in the first blank line below the main paragraph.
12. Choose **Home**→**Clipboard**→**Paste menu button** ▼→**Paste Special**.
13. In the Paste Special dialog box, choose **Microsoft Excel Worksheet Object**, click the **Paste Link** option, and click **OK**.
Now you will edit the worksheet in Excel and observe the change in the linked table.
14. Switch to Excel, tap **Esc** to remove the marquee surrounding the table, and click the cell at the top of the worksheet to select it.
15. Double-click the cell to position the insertion point in the cell and then click and drag to select **Quarter 1**.

A	B	C	D	E
Collectibles & Curiosities - Quarter 1				

16. Type **Year-to-Date** and tap **[Enter]**; switch to Word.
Notice that the linked table is updated with the change you made. If the table failed to update, right-click it and choose Update Link.
17. Position the insertion point in the blank line below the table.
Now you will link an Excel chart in Word using the Paste Options smart tag.
18. Switch to Excel, click the **Sheet 2** tab at the bottom of the workbook, and then click the chart to select it.
19. Choose **Home**→**Clipboard**→**Copy** and then switch back to Word.
20. Choose **Home**→**Clipboard**→**Paste** and click the **Paste Options** smart tag at the bottom of the chart.
21. Click **Keep Source Formatting & Link Data**. (If necessary, use ToolTips to identify the button.)
22. Switch to Excel, exit Excel, and save changes when prompted.

Open Excel and Display Chart Tools from Within Word

23. Double-click in the worksheet table in Word to open the Excel file.
There is an error in the March sales figure for Glass & Crystal, so you will make that change in the worksheet.
24. Click **cell B7** (*Glass & Crystal, March*) and tap **[Delete]**; type **1,500.00** and tap **[Enter]**.
25. Switch to Word and ensure that both the table and chart updated.
If your table failed to update, right-click the Excel worksheet table and choose Update Link from the menu. It's possible the worksheet table will update but not the chart. If your chart failed to update, click the chart and choose Chart Tools→Design→Data→Refresh Data.
26. Save the document and exit Word.

Update Links and Break a Link Between Word and Excel

27. In Excel, click **cell D5** (*Vintage Jewelry, January*) and tap **[Delete]**; type **600** and tap **[Enter]**.
28. In Word, open **W13-R1-Q1SalesRptRevised**; when the message appears prompting you to update links, click **Yes**.
29. If your table or chart failed to update, use the manual procedures you've used before to update.
30. In Word, right-click the worksheet table to display the pop-up menu.
31. Choose **Linked Worksheet Object** and then choose **Links** from the submenu.
32. With the worksheet selected, click **Break Link**.
33. When the message appears verifying the break, click **Yes**.
34. With the chart selected, click **Break Link**, click **Yes**, and then click **OK**.
Now you will test to ensure that the links are broken.
35. Right-click the worksheet table in Word and notice that Update Link does not appear in the menu.
36. Select the chart, choose **Chart Tools**→**Design**→**Data**, and notice that the Refresh Data button is grayed out.
37. Save and close the Word and Excel files.

REINFORCE YOUR SKILLS: W13-R2

Organize an Autumn Garden Cleanup for Seniors

Kids for Change volunteers assist senior citizens with autumn garden cleanup every year, and it's time to get that project rolling again. In this exercise, you will use Excel and Mail Merge to send letters announcing the volunteers' meeting. You will also convert a Word outline to a PowerPoint presentation for the meeting to review garden tasks needed at this time of the year. Finally, you will save a document as a single file web page so volunteers can go online to see which gardening supplies are needed for the project.

1. Open **W13-R2-GardenLtr** from your **Word Chapter 13** folder and save it as: **W13-R2-GardenLtrRevised**
2. Choose **Mailings**→**Start Mail Merge**→**Start Mail Merge** →**Letters**.
Word will now recognize your letter as the main document.
3. If necessary, turn on formatting marks.
Now you will connect an Excel file as the data source.
4. Choose **Mailings**→**Start Mail Merge**→**Select Recipients** and then choose **Use an Existing List**.
5. Navigate to your **Word Chapter 13** folder and open **W13-R2-AddressLst.xlsx** (an Excel file).
6. When the Select Table dialog box appears, make sure Sheet 1, which contains the address list, is selected; then click **OK**.
Now you will insert the merge codes in your letter.
7. In the letter, delete the **Address Block** text but not the paragraph symbol at the end of the line.
8. Choose **Mailings**→**Write & Insert Fields**→**Address Block** .
9. When the Insert Address Block dialog box opens, click **OK** to accept the default formats for the inside address.
10. Delete the **Greeting Line** text but not the paragraph symbol at the end of the line.
11. Choose **Mailings**→**Write & Insert Fields**→**Greeting Line** .
12. When the Insert Greeting Line dialog box opens, choose **Joshua** from the drop-down list and click **OK** to insert the Greeting Line code.
Now you will conduct the merge.
13. Choose **Mailings**→**Finish**→**Finish & Merge** →**Edit Individual Documents**.
14. When the Merge to New Document dialog box opens, click **OK** and then turn off formatting marks.
15. Scroll through the documents to see the results of the merge and then close the document without saving it.
16. Save and close **W13-R2-GardenLtrRevised**.

Create a PowerPoint Presentation from a Word Outline

Now you will create the PowerPoint presentation that Kids for Change will use during the meeting to remind team members of the various gardening tasks that must be completed during their cleanup project. You will generate the presentation from a Word outline.

17. Open **W13-R2-GardenTasks** and choose **View**→**Views**→**Outline**.

18. Click several entries and notice the heading levels indicated on the Ribbon.
Level 1 entries will provide slide titles, and Level 2 entries will provide bullet points.
19. Close the outline document.
20. Start PowerPoint and click the **Open Other Presentations** link at the bottom of the Recent list on the left of the Start screen.
21. Navigate to your **Word Chapter 13** folder; in the bottom-right corner, click the drop-down list and choose **All Files**.
22. Double-click **W13-R2-GardenTasks**.
23. Click several slide icons in the left panel and notice that the titles are formed from the Level 1 outline entries and the bullet points come from the Level 2 outline entries.
24. Exit PowerPoint without saving.

Save a Document as a Web Page

In planning for the Kids for Change garden cleanup project, the project manager needs to determine which gardening supplies members can contribute to use during the project.

25. Open **W13-R2-GardenSupplies** from your **Word Chapter 13** folder and save it as:
W13-R2-GardenSuppliesRevised
The document is set up in a table, which is common for organizing data in web pages. If you cannot see table gridlines, choose Table Tools→Layout→Table→View Gridlines.
26. Choose **File→Save As**, navigate to your **Word Chapter 13** folder, and choose **Single File Web Page** from the Save as Type list.
27. Click **Change Title**, type **Gardening Supplies** in the dialog box, and click **OK**.
This text will appear in the title bar or as a tab in your default browser.
28. Click **Save** and note that Word automatically switches to Web Layout view.
Now you will open the document in your web browser. Steps for opening the file in your default browser may vary slightly. You may need to seek assistance to determine the correct method.
29. Using Windows File Explorer, navigate to your **Word Chapter 13** folder and double-click the MHTML version of **W13-R2-GardenSuppliesRevised**. (If necessary, use the file icon to identify the single file web page file.)
30. Observe *Gardening Supplies* at the top of the browser and then close the browser.
31. Exit all programs.

REINFORCE YOUR SKILLS: W13-R3

Report on a Fundraiser and Work on Pending Projects

Kids for Change sells used books to raise funds for its projects. In this exercise, you will send a letter to the board members containing sales data from Excel. You will also use a PDF file, a PowerPoint presentation, and a single file web page to help pending projects move forward.

1. Start Word, open **W13-R3-BookSalesLtr** from your **Word Chapter 13** folder, and save it as:
W13-R3-BookSalesLtrRevised
2. If necessary, choose **View→Views→Print Layout** to change from Web Layout view.

3. Start Excel and click the **Open Other Workbooks** link at the bottom of the Recent list on the left side of the Start screen.
4. Navigate to your **Word Chapter 13** folder, open **W13-R3-UsedBookSales**, and save it as: **W13-R3-UsedBookSalesRevised**
5. Press **Ctrl**+**Home** to select the first cell in the worksheet; then press **Shift** and click the last cell in the table (contains \$1,424.00).
6. Press **Ctrl**+**C** to copy the data.
7. Switch to Word, display formatting marks, and then position the insertion point on the second blank line below the letter closing.
8. Choose **Home**→**Clipboard**→**Paste menu button** ▼→**Paste Special**.
9. Choose **Microsoft Excel Worksheet Object** from the list, click **Paste Link**, and click **OK**.
10. Close Excel.
Now you will open Excel from within Word.
11. Double-click the worksheet table in Word to open the Excel file.
You need to correct the January sales figure for Historical Fiction.
12. Click **cell C3** (*Historical Fiction, January*); type **\$385.00** and tap **Enter**.
13. Switch to Word and verify that the worksheet table updated.
14. If your table failed to update, right-click the table and choose **Update Link**.
15. Save and close the Word document and exit Excel, saving when prompted.

Add a PowerPoint Presentation to a Word Document

Kids for Change will soon meet to discuss upcoming projects. You will paste a PowerPoint presentation that provides an overview of the projects into a letter to the board members for their review.

16. Open **W13-R3-BoardMtgLtr** from your **Word Chapter 13** folder and save it as: **W13-R3-BoardMtgLtrRevised**
17. Position the insertion point at the end of the document.
18. Choose **Insert**→**Text**→**Object** and click the **Create from File** tab.
19. Click **Browse**, navigate to your **Word Chapter 13** folder, double-click **W13-R3-ProjectsPPT**, and then click **OK**.
20. Double-click the slide image to start the presentation and then click the mouse pointer on the screen to advance the slides. (Notice the Beach Cleanup and Golden Retriever Rescue projects as you view the presentation.)
21. When the black screen appears, click again to close the presentation and then save and close the file.

Edit a PDF File in Word

One of the upcoming projects is the Beach Cleanup. Kids for Change wants to get local school kids involved. You will send an online letter to superintendents in the area requesting their support. You will use a PDF file, as it's likely that the letter will be read on computers with varying operating systems and software. The date for the cleanup has slipped a week, so you need to update the file.

22. In Word, open **W13-R3-SuperLtr.pdf** from your **Word Chapter 13** folder.
23. When the message appears, click **OK** and change the date (second line of body paragraph) from *September 3rd* to **September: 10th**
24. Save the file as a PDF file naming it: **W13-R3-SuperLtrRevised**
25. If the file opens in a PDF reader, close the reader.
26. Close the Word document without saving.

Create a Web Page from a Word Document

One of the pending projects is the Golden Retriever Rescue project. You've created a flyer announcing the Foster Home Fair for Golden Retriever Rescue, which will take place at the Community Center. You will save the flyer as a single file web page so it can be posted on the Community Center website.

27. Open **W13-R3-FosterHomeFair** from your **Word Chapter 13** folder.
28. Choose **File**→**Save As** and navigate to your **Word Chapter 13** folder.
29. Name the file **W13-R3-FosterHomeFairRevised** and choose **Single File Web Page** from the Save as Type list.
30. Click **Change Title** and then type **Foster Home Fair** and click **OK**; then click **Save**.
Now you will add alternative text to the picture.
31. Select the picture and choose **Picture Tools**→**Format**→**Accessibility**→**Alt Text**.
32. If necessary, remove any existing text; in the Description field, type **Olivia needs a good home!** and then close the task pane.
Seek assistance if you need help opening the file in your browser.
33. Navigate to your **Word Chapter 13** folder using Windows File Explorer and then double-click **W13-R3-FosterHomeFairRevised**.
34. Review the web page and then close the browser.
Now you will edit the web page. The web page file should still be open in Word.
35. Position the insertion point at the end of the last bullet point, tap **Enter**, and type: **Fire Department BBQ Cook-off**
36. Save and close the file.
Seek assistance if you need help opening the file in your browser.
37. Navigate to your **Word Chapter 13** folder using Windows File Explorer and then double-click **W13-R3-FosterHomeFairRevised**.
38. Observe the change you made to the web page and then close the browser.

Apply Your Skills

APPLY YOUR SKILLS: W13-A1

Prepare a Report Comparing Tours

In this exercise, you will produce a report for the Universal Corporate Events management team comparing the sales of four tours over three months. You will embed an Excel worksheet table in a Word document and then link an Excel worksheet table and chart in the document. You will update links when changes are made in Excel, and finally you will break the link between Word and Excel.

1. Open **W13-A1-MgmtLtr** from your **Word Chapter 13** folder and save it as: **W13-A1-MgmtLtrRevised**
2. If necessary, choose **View**→**Views**→**Print Layout** to change from Web Layout view.
3. If necessary, display formatting marks, and then position the insertion point on the second blank line below the letter closing.
4. Start Excel, open **W13-A1-1stQSales.xlsx** from your **Word Chapter 13** folder, and save it as: **W13-A1-1stQSalesRevised**
5. Press **[Ctrl]+[Home]** to select the cell at the top of the table, press **[Shift]**, and click the last cell in the table (value of \$150,000).
6. Copy the table and then switch to Word and make sure the insertion point is on the second blank line below the letter closing.
7. Click **Paste menu button** ▼ → **Paste Special** and link the **Microsoft Excel Worksheet Object**.
Now you will make a change to the Excel table and observe the change in the linked table in Word.
8. Switch to Excel and turn off the marquee.
9. Click **cell C3** (*Hawaii Resort, January*) and enter **40,000** to replace the current number.
10. Switch to Word and notice the change you made.
If your worksheet table failed to update, use the Update Link command. Now you will link an Excel chart from the same file in the document.
11. In Excel, click the **Sheet 2** tab and then click the chart.
12. Copy the chart, switch to Word and paste it at the bottom of the document, and then use the **Paste Options** smart tag and the **Keep Source Formatting & Link Data** button to link the chart in Word.
13. Switch to Excel and save your changes; exit Excel.
Now you will open Excel from within Word and edit the worksheet.
14. Double-click the worksheet table to open Excel and change the data in **cell B5** (*Bahamas Cruise, March*) to: **45,000**
15. Switch to Word, observe the change, and, if necessary, use **Update Link** to update the worksheet table and **Refresh Data** to update the chart.
16. Save and close the file; exit Word.
Now you'll make a change in Excel and update links when you reopen the Word document.
17. In Excel, replace the data in **cell D4** (*Florida Spa, February*) with: **40,000**

18. Start Word, open **W13-A1-MgmtLtrRevised** from your **Word Chapter 13** folder, and update the links.
19. If necessary, use **Update Link** to update the worksheet table and **Refresh Data** to update the chart.
Because you don't want the data to update any more, you will break the link between Word and Excel.
20. In the Links dialog box, break the link for both the worksheet and the chart.
21. Right-click the worksheet table and ensure that the Update Link command is not available.
22. Click the chart, choose **Chart Tools**→**Design**→**Data**, and observe that the **Refresh Data** button is grayed out.
23. Save and close all files and exit Excel.

APPLY YOUR SKILLS: W13-A2

Prepare Documents for a Tour to Turkey

Universal Corporate Events reps are planning a tour of Turkey for a client. In this exercise, you will create a PowerPoint presentation from a Word outline. Then you will insert a PowerPoint presentation in a letter for tour members and create a single file web page from a Word document listing side tours in Turkey.

1. Open **W13-A2-TurkeyOutline** and switch to Outline view.
2. Observe the heading levels indicated in the Outlining tab, which will become the title and bullet-point entries in the PowerPoint slides; close the outline document.
3. Start PowerPoint, click **Open Other Presentations** at the bottom of the left panel, and navigate to your **Word Chapter 13** folder.
4. In the bottom of the Open dialog box, choose **All Files** from the drop-down list.
5. Double-click **W13-A2-TurkeyOutline** to open it; click through the slides in the left panel and observe the effect of the different heading levels in the outline.
6. Exit PowerPoint without saving.
Now you will add a PowerPoint presentation to a letter you're sending as an email attachment to the tour members.
7. In Word, open **W13-A2-TurkeyLtr** from your **Word Chapter 13** folder and save it as:
W13-A2-TurkeyLtrRevised
8. Position the insertion point at the end of the document, insert **W13-A2-TurkeyPPT**, and view the presentation.
Now you will save the letter as a PDF file as tour members will likely have different types of computers.
9. Choose **File**→**Save As**, navigate to your **Word Chapter 13** folder, and save the file as a PDF file.
10. If your file opens in a PDF reader, close the reader.
11. Save and close **W13-A2-TurkeyLtrRevised.pdf**.
The location for the meeting has changed, so you will edit the PDF file in Word and resave it as a PDF file.
12. Open the PDF file in Word and change *Lakeside* to: **Harbor**
13. Resave the file as a PDF file and name it: **W13-A2-TurkeyLtrRevised2**
14. If the file opens in a reader, close the reader.
15. Save the Word document as **W13-A2-TurkeyLtrRevised2** and make sure to choose Word Document in the Save as Type menu; close the file.

Create and Edit a Web Page in Word

You have been asked to create a web page for the Universal Corporate Events website showing the side tours offered for the tour of Turkey.

16. Open **W13-A2-TurkeyWebPage**, save it as Single File Web Page, and name it **W13-A2-TurkeyWebPageRevised**. Change the title to: **Side Trips in Turkey**
17. Open and observe the web page in your browser, and then close the browser.
Now you will add a side-tour destination to the web page. The web page document should still be open in Word.
18. Position the insertion point after *Turkish Bath*, tap **Enter**, and type: **Istanbul**
19. Save and close the file.
20. Open the file in your browser again, observe the change, and then close the browser.

APPLY YOUR SKILLS: W13-A3

Plan an Australian Tour

A Universal Corporate Events representative is preparing an Australian tour for a client. You have been asked to prepare the documents associated with the tour. In this exercise, you will use an Excel name and address list for a mail merge and prepare a letter containing a PowerPoint presentation. Then you will prepare a single file web page about Australia for tour members to view online.

1. Open **W13-A3-AustraliaLtr** from your **Word Chapter 13** folder and save it as: **W13-A3-AustraliaLtrRevised**
2. If necessary, change the view to Print Layout, and then designate the letter as the main document in a mail merge.
3. Designate Sheet 1 of the **W13-A3-AustraliaN&A** Excel file as the recipient list.
4. Replace the **Address Block** placeholder text with the **Address Block code**, accepting the default formats for the inside address.
5. Replace the **Greeting Line** placeholder text with the **Greeting Line code**, accepting the default formats for the greeting line.
6. Finish the merge, choosing **Edit Individual Documents**, and merge all records.
7. Review the merged letters and then close the merged file without saving.
8. Save and close **W13-A3-AustraliaLtrRevised**.

Insert a PowerPoint Presentation in a Word Document

The tour members have now attended an orientation meeting, and the Universal Corporate Events representative has asked you to insert the PowerPoint presentation in a letter to members so they can review the topics covered in the meeting.

9. Open **W13-A3-OrientLtr** from your **Word Chapter 13** folder and save it as: **W13-A3-OrientLtrRevised**
10. Position the insertion point at the end of the letter, insert **W13-A3-AussiePPT**, and view the presentation.
11. Save and close the file.

Create and Edit a Web Page in Word

12. Open **W13-A3-AussieWebPage** from your **Word Chapter 13** folder, save it as a single file web page, and then name it **W13-A3-AussieWebPageRevised** and change the title to:
Australia Overview
13. View the web page in your browser and then close the browser.
Now you will edit the web page in Word. The web page file should still be open.
14. Position the insertion point after the word *Territories* and tap **Enter**. Type **History** and then save and close the web page file.
15. View the web page in your browser, observe the change, and then close the browser.
16. Exit Word.



Project Grader

This chapter does not include Project Grader exercises. Project Grader content is based on the learning objectives for a chapter, and sometimes those learning objectives cannot be accurately graded by the system.

Extend Your Skills

These exercises challenge you to think critically and apply your new skills in a real-world setting. You will be evaluated on your ability to follow directions, completeness, creativity, and the use of proper grammar and mechanics. Save files to your chapter folder. Submit assignments as directed.

W13-E1 That's the Way I See It

As a sales rep for a small business, you track your quarterly sales in Excel. It's the end of the third quarter, and you will submit the end-of-quarter figures and the associated chart to your boss in a Word file. Create a one-paragraph Word file indicating that you are submitting your third-quarter sales summary. Name the file: **W13-E1-MyLetter**

Link the worksheet table and chart from **W13-E1-3rdQSales**. The product names are generic. Decide which products your company sells and change the product names in the Excel file accordingly, saving it as **W13-E1-3rdQSalesRevised** when finished. Update the linked objects in your Word document, too.

Your boss has asked you to use Mail Merge to send a mailing to customers announcing a new product. Decide on the new product and then write a letter (one to two paragraphs) describing it. Save the file as **W13-E1-MyMergeLtr** and designate the letter as the main document. Designate **W13-E1-Address** (Word Chapter 13 folder) as the recipient list. Add the Address Block and Greeting Line merge codes; conduct the merge. Save the merged file as: **W13-E1-Merged**

W13-E2 Be Your Own Boss

As the owner of Blue Jean Landscaping, you plan to hold a seminar to discuss your products and services. You want a PowerPoint presentation to guide your seminar. Use the Word outline **W13-E2-BJLGardens** to create the slides and save the presentation as: **W13-E2-BJL-PPT**

After the seminar, you will email a Word document to attendees with the presentation inserted. Create a letter (one to two paragraphs) thanking customers for attending the seminar. In your letter, explain that the presentation is included in the email and add instructions on how to play the slide show. Save the Word document as **W13-E2-BJLLetter** and then save it as a PDF using the name: **W13-E2-BJLetterRevised**

W13-E3 Demonstrate Proficiency

Stormy BBQ sponsors an annual rodeo. To encourage a big turnout, you've been asked to prepare a PowerPoint presentation to use as an email attachment for Stormy BBQ's customers. To begin, open **W13-E3-RodeoOutline** in PowerPoint. Save the presentation as: **W13-E3-RodeoPres**

Then, create a two- or three-paragraph Word document describing the rodeo and why people should attend. Save the file as **W13-E3-RodeoWordDoc** and insert a PowerPoint presentation, **W13-E3-RodeoPPT**, in the document. Remember to include instructions on how to run the slide show.

There will be a Rodeo Raffle, and you've been asked to create a web page to put on Stormy BBQ's website listing the prizes. Convert **W13-E3-RodeoWebPage** to a single file web page with the title **Prizes List** and the filename: **W13-E3-RodeoWebPage**

Test the MHTML file in your browser. Add a prize, a \$50 Starbuck's Gift Card, to the bottom of the list of prizes in the document. Save the file and then test it again in your browser.

Glossary

Accessibility Checker Describes possible accessibility issues in your files so you can fix them so someone with a disability can read and access your content

Compatibility Checker When a Word 2019 document is saved down to Word 2010 or an even earlier version, the Compatibility Checker notifies the user how features specific to Word 2019 will be handled

Compatibility Mode Opening a document that was created in Word 2010 or earlier opens it in Compatibility Mode; available features are limited to those found in the earlier versions

Compatibility Pack This free download from Microsoft allows a user to open a Word 2007–2019 document in an earlier version of Word

content controls Placeholder fields, entered into forms, that enable users to click on the fields and enter information

convert Feature that allows you to transform documents that were created in an earlier version of an application to the Office 2019 file format

destination file A file on which an operation is performed or into which data copied from another document is pasted

digital signature Means of authenticating the identity of the originator of a document; a signed document cannot be modified

Document Inspector Reviews documents for hidden data or personal information

document properties Information about a document, such as the date and time it was last modified, the author's name, and the name of the last person who modified it

embed To incorporate within the body of a file or document

encryption Technique for encoding a document so it can only be read by the sender and the intended recipient

link A code or instruction that connects one part of a source file to a destination file; the destination file can be updated when the source file is modified

macro A series of frequently used commands grouped together and saved as a single command; used to speed up repetitive tasks

Mark as Final Command that makes a document read-only; places an icon on the status bar to let readers know they are viewing the final form of the document

object Refers to graphical images such as shapes, WordArt, Excel spreadsheets, chart, and pictures; these elements can be shared between documents

round-tripping Converting a document created in Word 97-2003 to Word 2019 format and then saving it back to the Word 97-2003 document format

source file The document in which data or copied text originally appeared

Visual Basic for Applications (VBA) A programming language used by Office programs that creates modules containing macros

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