

# Personalizing Word

**A**s a Word user, you can increase productivity by customizing the application to work the way you want it to work. You can modify Word options and document properties to meet your needs. You can also automate repetitive tasks by recording macros. In this chapter, you will work with Word options, document properties, and macros to enhance the way you work.

## LEARNING OBJECTIVES

- Customize Word options
- Modify document properties
- Create and run macros

## CHAPTER TIMING

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

## 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 are always at the top of the list, and you have discovered that using document properties can be helpful in searching for files located in a large group of files. You have also identified tasks that you perform repeatedly and terms that you type over and over that you will automate.

# Setting Word Options

The Word Options dialog box contains numerous options that enable you to control the way Word acts. 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.

☰ File→Options

## Changing the AutoRecover Interval and Default File Location

If you are 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. If you want to save to a local computer, you can change the save location and reduce 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.

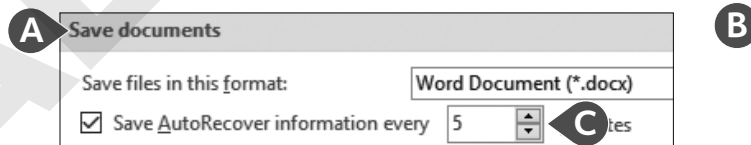
☰ File→Options→Save→Save AutoRecover Information Every x Minutes

☰ File→Options→Save→Default Local File Location

### DEVELOP YOUR SKILLS: W3-D1

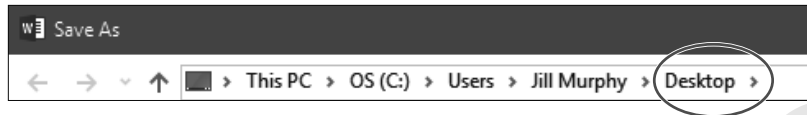
*In this exercise, you will set the AutoRecover time interval to five minutes. Then you will change the default file location where files are saved.*

1. Start Word, open **W3-D1-DraftProc** from your **Word Chapter 3** folder, and save it as **W3-D1-DraftProcRevised**.
2. Choose **File→Options** and click the **Save** category on the left.
3. 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.
4. In the same section of the dialog box, check the **Save to Computer by Default** checkbox.

5. To specify a particular folder, click the **Browse** button to the right of the Default Local File Location field.
6. In the Modify Location dialog box, scroll in the left column to **Desktop** and then click **OK** twice.
7. Press **Ctrl** + **N** to start a new, blank document.
8. Choose **File**→**Save As** and notice that *This PC* is highlighted rather than OneDrive.
9. Click the **Browse** button at the bottom of the Save As panel on the left.



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

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## Modifying the Recent Document 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 twenty-five 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

When you work with only a few documents, the documents you need will always appear in the Recent Documents list. If you find that you primarily work with the last few documents 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 zero to fifty.



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

Workers who perform tasks associated with specific projects might enjoy the ability to clear all unpinned items from the Recent Documents list, thus displaying only the documents they 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 the documents you used, especially if you work with confidential documents.

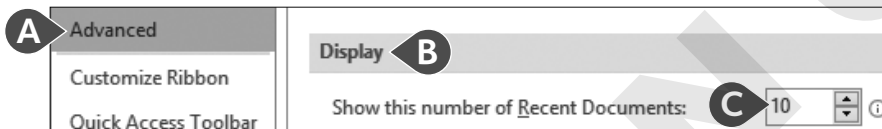


View the video “Setting the Recently Used List to Zero.”

### DEVELOP YOUR SKILLS: W3-D2

*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.*

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 the number of documents to **10**.
2. Click **OK** and then 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.
4. Tap **[Esc]** to close the menu.
5. Right-click any document in the list and choose **Pin to List**.
6. Click the pushpin icon of the document you just pinned to unpin it.
7. Click **Back** to return to the document window.

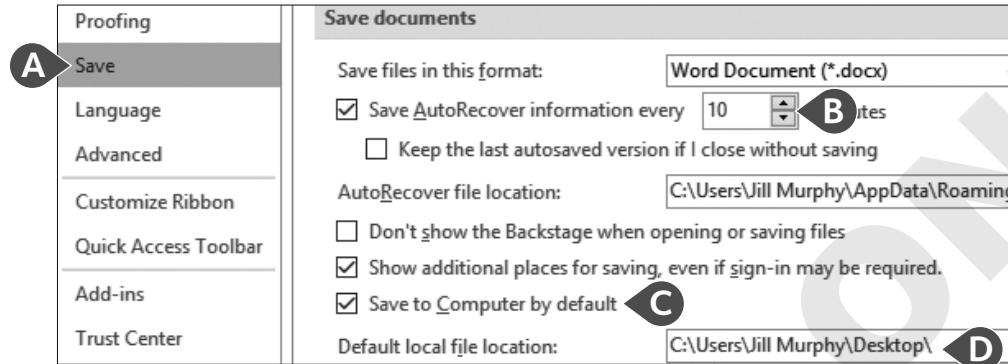
## Restoring Default Settings

Setting custom options for the way you work is a great practice for a computer that is assigned to you. However, when you are working on a computer you share with others, it is generally a good idea to restore the default settings you have changed.

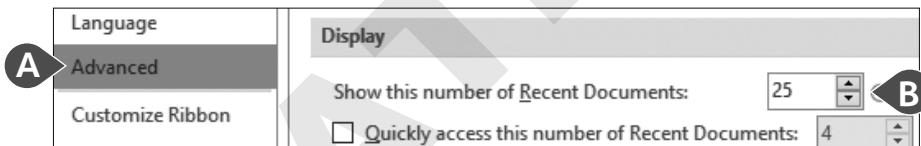
## DEVELOP YOUR SKILLS: W3-D3

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.

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 to what it was before you made the change.
  - C Uncheck this box if it was previously unchecked.
  - D Enter the original file location path.
2. Follow these steps to restore your Recent Documents list:

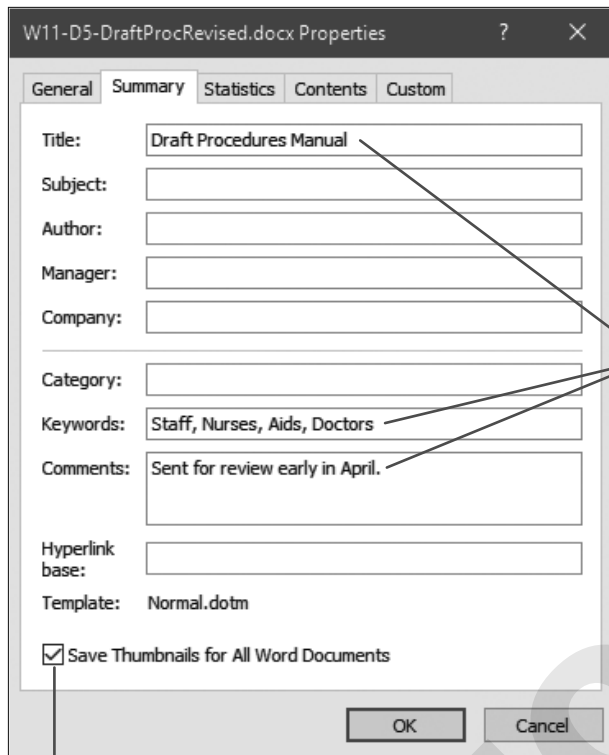


- A Choose the **Advanced** category.
  - B In the Display section, reset the number of recent documents to **25** or to what it was before you made the change.
3. Click **OK**.

## 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 size of the file, 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.

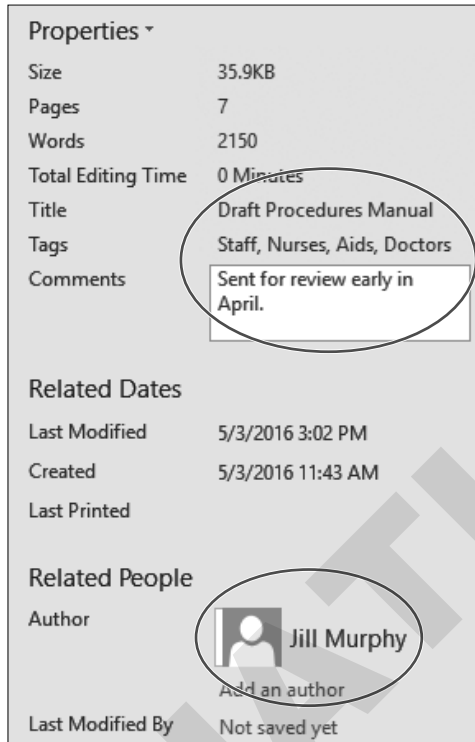
Following are descriptions of the tabs in the Advanced Properties dialog box:


- **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: W3-D4

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

1. Save your file as **W3-D4-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.



4. Click the **Properties** heading/button at the top of the Properties panel and then click **Advanced Properties**.
5. Click **OK** and then click **Back**  to return to the document.
6. Save the file.

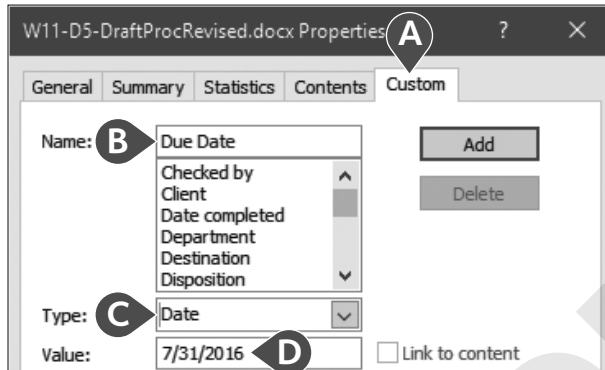
## Creating a Custom Property

Though the available properties are sufficient for most documents, there may be times when you want to store additional properties. 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: W3-D5

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 **W3-D5-DraftProcRevised**.
2. Choose **File**→**Info**, click **Properties** 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 **7/31/2016** in the Value field and then click **OK**.
4. Save and close the document.

## 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

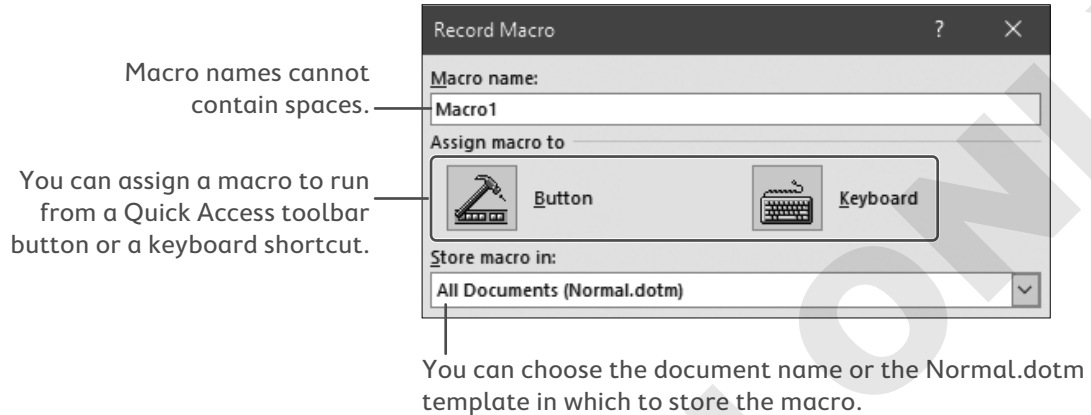
### Assign Macros to a Toolbar or a Keyboard Shortcut

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 is not required, though. You can always run a macro directly from the Macros dialog box.



## Store Macros

Macros can be stored in documents or templates, including the Normal.dotm template, which is the default. The *m* in the *.dotm* file extension indicates the template can contain macros. Macros stored there are available to all documents on the system.



## 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.

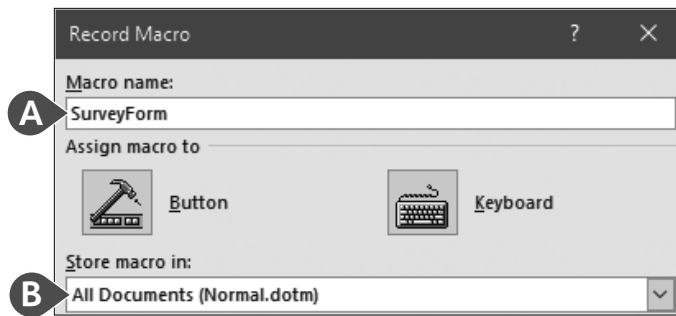
When you record a macro and change settings in a dialog box using arrow keys, the change normally sticks until you exit Word; this means the dialog box doesn't reset to its default state. As a result, running the macro again in the same session may change the setting to the *next* option in the dialog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

### DEVELOP YOUR SKILLS: W3-D6

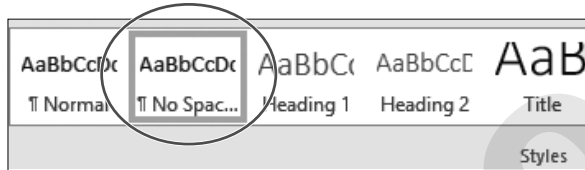
*In this exercise, you will record a macro that sets up the orientation, margins, and page size for a survey form. The macro will also insert and format text.*





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:

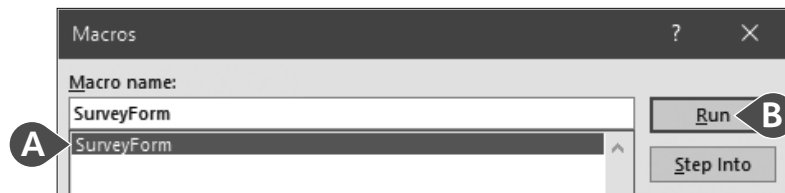


- A Type **SurveyForm** (no spaces) in the Macro Name field.
  - B Ensure that the storage location is the **Normal.dotm** template, which makes the macro available to all documents on your computer; click **OK**.
4. Choose **Home**→**Styles** and click the **No Spacing** style in the Quick Styles gallery.



5. Choose **Home**→**Font**→**Bold** **B**.
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** at the bottom of the gallery.
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 set the width to **7"** and the height to **5"**.
11. Click **OK** to apply the settings.
12. Choose **View**→**Macros**→**Macros**  menu button ▼→**Stop Recording**.
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:



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

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

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## Editing Macros with the VBA Editor

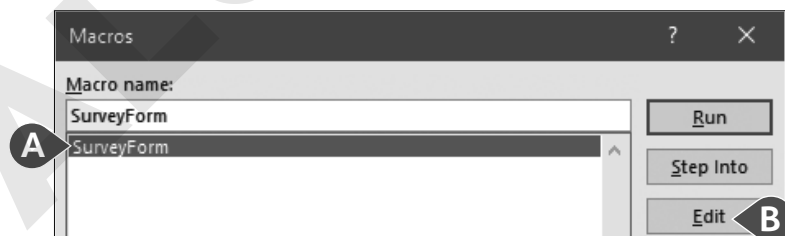
Visual Basic for Applications (VBA) is a macro programming language that runs in Office 2016 applications. When you record a macro, you are creating a Visual Basic module containing program instructions that execute when you run the macro. This topic provides a brief introduction to Visual Basic, but 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: W3-D7

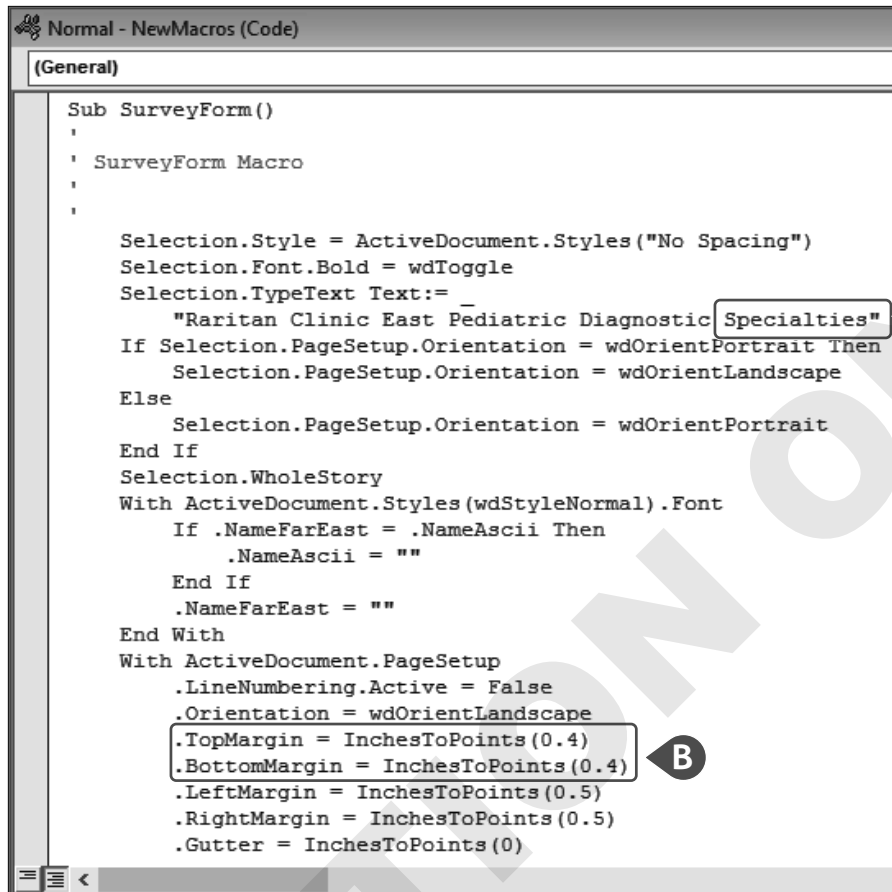
*In this exercise, you will open the Visual Basic editor and revise your macro. Then you will run the modified macro.*

1. Choose **View**→**Macros**→**Macros** .
2. Follow these steps to begin the editing process:





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

3. 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
End Sub
```

- A** Change the word *Specialties* to **Specialists**.
  - B** Change the TopMargin and BottomMargin settings from 0.4 to **0.5**.
4. Choose **File**→**Close and Return to Microsoft Word**.
  5. Choose **View**→**Macros**→**Macros** , choose **SurveyForm** in the Macro Name list, and then click **Run**.
  6. Choose **Layout**→**Page Setup**→**Margins** →**Custom Margins**.
  7. Close the dialog box.
  8. Close the document without saving; 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 that you can choose to help keep your macro buttons straight.

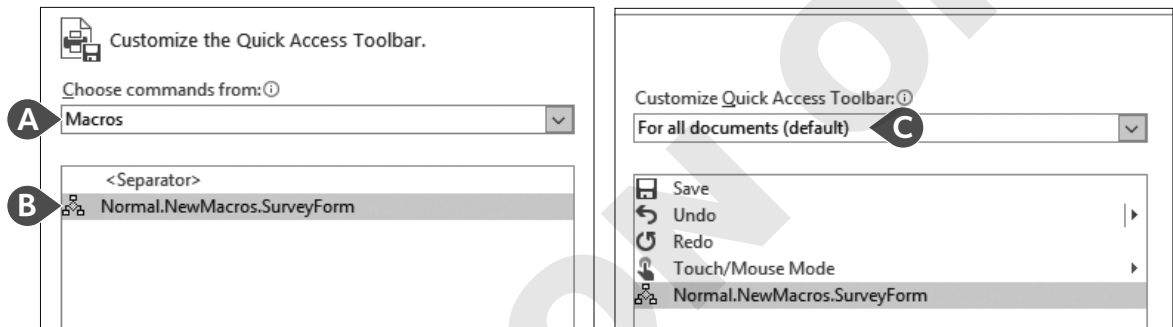


View the video “Assign a Macro to the Quick Access Toolbar.”

## DEVELOP YOUR SKILLS: W3-D8

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

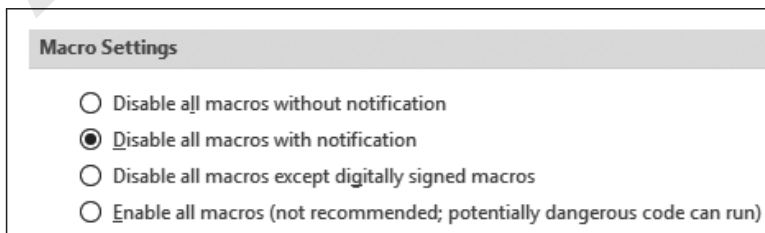
1. Choose **File**→**Options** and then click the **Quick Access Toolbar** category.
2. Follow these steps to assign a macro button to the Quick Access toolbar:



- A Choose **Macros** here.
  - B Select the **SurveyForm** macro.
  - C Ensure that **For All Documents (Default)** appears here.
3. Click the **Add** button in the middle of the dialog box to add the macro to the Quick Access Toolbar list and then click **OK**.
4. Hover the mouse pointer over the button to see the button name in a ToolTip; 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	This is the default setting. It gives the user the option to enable or disable a macro.
Disable all macros except digitally signed macros	This option allows users to enable or disable only <i>digitally signed macros</i> .
Enable all macros (not recommended; potentially dangerous code can run)	This option significantly reduces security and could potentially 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: W3-D9

*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** and then choose the **Trust Center** category on the left.
2. Click the **Trust Center Settings** button and review the Macro Settings options at the top of the dialog box.
3. Click **Cancel** twice to close the dialog boxes.
4. Choose **View**→**Macros**→**Macros** .
5. Choose the **SurveyForm** macro in the Macro Name list, click **Delete**, click **Yes** to verify the deletion, and then close the dialog box.
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 by completing the Self-Assessment. The answers to these questions can be found at the back of this book.

1. You use the Customize dialog box to assign macros to the Quick Access toolbar. True False
2. You can assign a macro to a keyboard shortcut. True False
3. VBA is a macro programming language. True False
4. The Macro feature records all Ribbon commands and mouse actions. True False
5. Pinned documents in the Recent Document list appear at the bottom of the list. True False
6. You can view a custom property on the Properties panel in Backstage view. True False
7. The Documents folder is the default location for saving files. True False
8. The Trust Center in the Word Options dialog box contains security settings. True False
9. You can record a series of steps for playback using the macro recorder. True False
10. Macro names cannot contain spaces. True False
11. Which of the following is NOT a source of information for document properties?
  - A. Options set on your computer
  - B. Custom properties you create
  - C. The Properties category in the Word Options dialog box
  - D. Information Word detects about your document
12. By default, new macros are stored in what template?
  - A. Normal.dotm
  - B. Custom
  - C. Network
  - D. Document
13. Which of the following features is NOT a document property?
  - A. File Size
  - B. Tracked Changes
  - C. Date Created
  - D. Author's Name
14. Which of the following cannot be used to run a macro?
  - A. Pressing
  - B. A Quick Access toolbar button
  - C. The Macros dialog box
  - D. A keyboard shortcut

