WORD 2021 & 365

Working with Long Documents

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

LEARNING OBJECTIVES

- Format with styles
- Create and manage custom styles
- Customize bullets and numbering
- Navigate long documents
- Format long tables
- Add captions

CHAPTER TIMING

- Concepts & Practice: 01:20:00
- Self-Assessment: 00:15:00
- Total: 01:35:00

PROJECT: REPORTING ON COMMON CHILDHOOD ILLNESSES

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

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Formatting Text with Styles

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

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

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

Home→Styles dialog box launcher 🖳

Custom Styles

Thus far, you've used Word's built-in styles. However, there may be situations in which the built-in styles don't meet your needs; for example, Raritan Clinic East has formatting standards set for different types of documents, and you can create custom styles to meet those standards. When creating these custom styles, you can also define the *level* in which you want them to be listed, which will determine how these headings are placed in a table of contents or your document's Headings list.

There are two approaches to creating custom styles. The method you choose is a matter of personal preference; both are equally effective and are described below:

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

View the video "Create a Style by Definition and a Style by Example."

DEVELOP YOUR SKILLS: W7-D1

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

1. Open **W7-D1-SickKids** from your **Word Chapter 7** folder and save it as:
   W7-D1-SickKidsRevised
2. Select the **Raritan Clinic East** heading at the top of the document.
   Now you will apply the example formatting.
3. Choose **Home→Font→Font menu button** ⌄ and then choose **Tahoma** from the menu.
4. Click the **Font Size menu** button ⌄ and choose **24 pt**.
5. Choose **Home→Paragraph→Center**.
6. Choose **Home→Styles dialog box launcher** to display the Styles task pane.

7. At the bottom of the task pane, click the **New Style** $\boxed{A_+}$ button to open the Create New Style from Formatting dialog box.
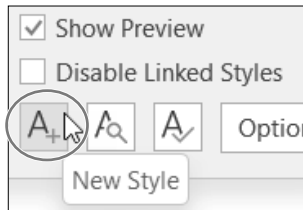
8. Follow these steps to complete the new style:
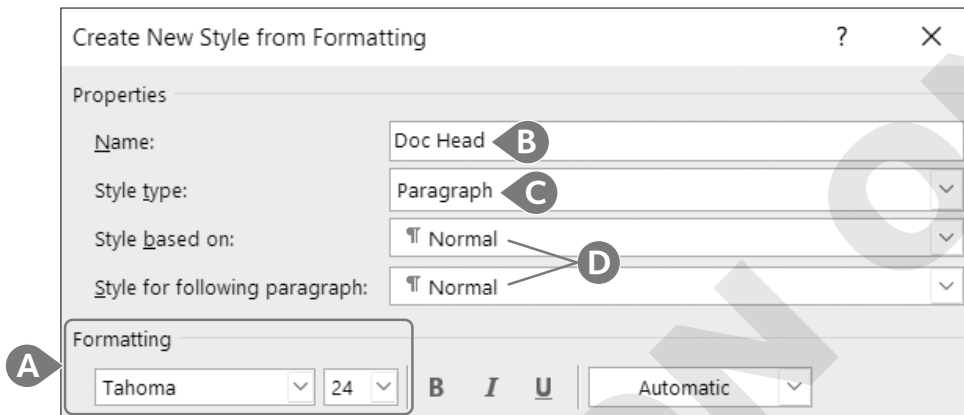
   A. The example formatting you applied earlier shows here.

   B. Name the style: **Doc Head**

   C. Make sure the Style type is **Paragraph**.

   D. If necessary, set the new style to be based on the **Normal** style and set the formatting for the following paragraph to **Normal**.

9. At the bottom of the dialog box, make sure the **Add to the Styles gallery** box is checked and then click **OK**.
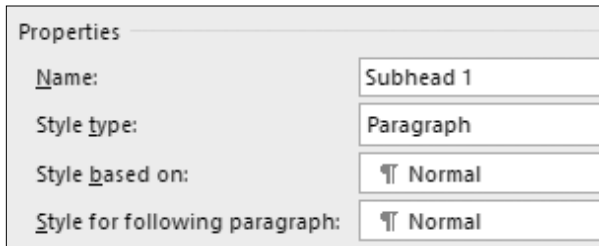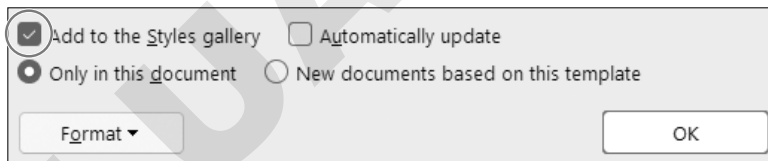
When the text that has the style applied is selected or the insertion point is in the text, your new style is highlighted in the Styles gallery on the Ribbon and in the Styles task pane.

Formatting Text with Styles **143**

Create Styles by Definition

Now you'll create a style by definition for the subheading at the top of the document.

10. Click in the **Childhood Diseases Seminar** subheading.

11. Click the **New Style** button at the bottom of the Styles task pane.

12. Set up the top portion of the dialog box as shown:

Properties	
Name:	Subhead 1
Style type:	Paragraph
Style based on:	¶ Normal
Style for following paragraph:	¶ Normal

You could do some font formatting in this dialog box, but you will choose the Format button instead because it provides more font options.

13. Click the **Format** button at the bottom of the dialog box, choose **Font** to open the Font dialog box, and choose **Tahoma** from the Font list.

TIP! If you type a *t* in the field at the top of the font list, the list automatically scrolls to the *Ts*.

14. Choose **14 pt** as the font size, check the **Small Caps** checkbox, and click **OK**.

Your font choices appear in the dialog box, and the preview screen displays the effect of your choices. Next, you will change the level of this subhead.

15. Click the **Format** button and choose **Paragraph**.

16. Click the **Outline Level menu** button ⌄ and choose **Level 1**.

Paragraph	?	×
Indents and Spacing	Line and Page Breaks	
General		
Alignment:	Left	
Outline level:	Level 1	☐ Collapsed by default

Notice that there are nine possible levels. Level 1 will be farthest left, Level 2 will be indented, Level 3 will be further indented, and so on.

17. Click **OK**.

Next you will center the subheading.

18. Click the **Center** button in the paragraph alignment group and click **OK**.

The new style appears in the Styles gallery on the Ribbon and in the Styles task pane.

Now you will create styles for the subheadings in the body of the document. You will have two levels of subheadings, and you will create styles by example for these subheadings.

19. In the next line, select **WebMD** and format it with **Arial**, **14 pt**.

20. Click the **New Style** button and follow these guidelines to finish creating the style:

- Name: **Subhead 2**
- Style Type: **Paragraph**
- Style Based On: **Normal**
- Style for Following Paragraph: **Normal**

21. Notice the example font formatting you applied in the Formatting area of the dialog box and then click **OK**.

You will apply the Subhead 2 style to another subheading in the document.

22. Scroll to page 3, position the insertion point in the subheading **Parents.com**, and choose **Subhead 2** from the Styles gallery.

23. Scroll back up to page 1, position the insertion point in the **RSV** subheading, and choose **Home→Font→Font menu button** ⌄.

24. Choose the **Arial** font and the **12 pt** font size.

25. Click the **New Style** button and follow these guidelines to finish creating the style:

- Name: **Subhead 3**
- Style Type: **Paragraph**
- Style Based On: **Normal**
- Style for Following Paragraph: **Normal**

26. Notice the example settings in the Formatting area and then click **OK**.

Now you will apply Subhead 3 to the rest of the subheadings in the document.

27. Click in the **Ear Infection** subheading and choose **Subhead 3** from the Styles task pane.

28. Use the same technique to apply Subhead 3 to the remaining subheadings:

- **Glue Ear**
- **Croup**
- **Hand-Foot-and-Mouth Disease**
- **Pinkeye**
- **Fifth Disease**
- **Common Cold**
- **Strep Throat**
- **Influenza**
- **Symptoms You Should Never Ignore**

29. Save the file.

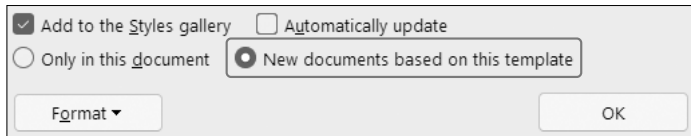# Modifying Styles and Clearing All Formatting

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

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

Home→Font→Clear All Formatting 🄰◇

Using Styles Across Documents

By default, custom styles you create are available only for the document in which you created them. However, you may want your custom styles to be available in other documents as well. You can do this by specifying that you want the style to be available in all *New documents based on this template*. Doing this in a document created from the default Blank document template will make the style available in all new blank documents you create from that point on.

☑ Add to the Styles gallery   ☐ Automatically update
○ Only in this document   ● New documents based on this template

Format ▾   OK

WARNING!   Adding styles to the template this way is a permanent change. The only way to remove these custom styles from the template is through the Organizer on the Developer tab (activated through the Customize Ribbon tab on the Options screen) under Document Template.

DEVELOP YOUR SKILLS: W7-D2

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

1. Save your file as: **W7-D2-SickKidsRevised**
2. Hover the mouse pointer over *Subhead 3* in the Styles task pane and click the **menu** button ⌄ that appears.
3. Choose **Modify** from the menu to open the Modify Style dialog box.

    This dialog box contains the same elements as the Create New Style from Formatting dialog box.

4. Click **Italic** and then click **OK**.
5. Scroll through the document and see that all subheadings with the Subhead 3 style are now italicized.

    You've decided to reformat the heading at the top of the document. Because this style is used only once in the document, it's easier to clear all the formatting and apply direct formatting to the heading.

6. Select the **Raritan Clinic East** heading at the top of the document, scroll to the top of the Styles task pane, and choose **Clear All**.
7. Click the **Home→Font dialog box launcher** and choose **Tahoma**, **22 pt**, **Small Caps**; click **OK**.
8. Choose **Home→Paragraph→Center**.

    The Normal style is highlighted in the task pane. You applied direct formatting to text that is formatted with the Normal style.

9. Save the file.

Removing and Deleting Styles

You can remove a style from the Styles gallery on the Ribbon without removing it from the Styles task pane. Because the Styles gallery on the Ribbon is a quick way to get to styles, you should save it for just the styles you use frequently. You can leave the style in the task pane for future use, or, if you prefer, you can delete it from the task pane. Completely deleting a style removes its formatting from the document.

DEVELOP YOUR SKILLS: W7-D3

In this exercise, you will remove the Doc Head style from the Styles gallery and then delete it from the task pane.
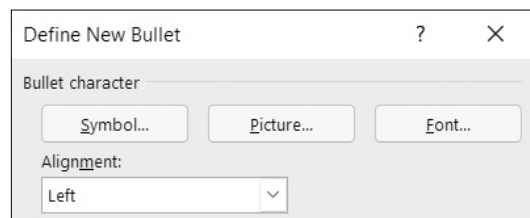
1. Save your file as: **W7-D3-SickKidsRevised**
2. If the Doc Head style is not visible in the Styles gallery on the Ribbon, click **More** to open the gallery and then locate the Doc Head style.
3. Right-click the style name and choose **Remove from Style Gallery**.

   Doc Head is still visible in the Styles task pane. You'll delete it next.
4. Hover the mouse pointer over *Doc Head* in the Styles task pane, click the **menu** button ⌄ that appears, and choose **Delete Doc Head**.
5. When the message appears verifying the deletion, click **Yes**.

   The style is deleted from the task pane.
6. Save and close the file.

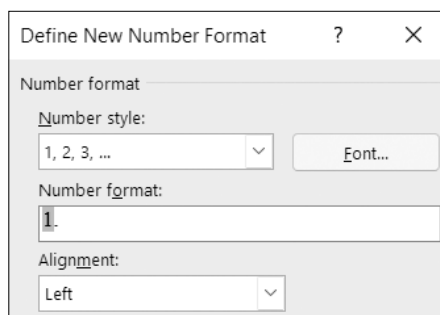# Customizing Bullet and Number Formats

The Bullets and Numbering libraries enable you to choose a different style for your bulleted or numbered list. You can also define your own custom formats. When working with long documents, you may want to adjust the formatting for certain lists as a visual cue that certain lists go together or should be considered separately.

Bullet Library

Numbering Library
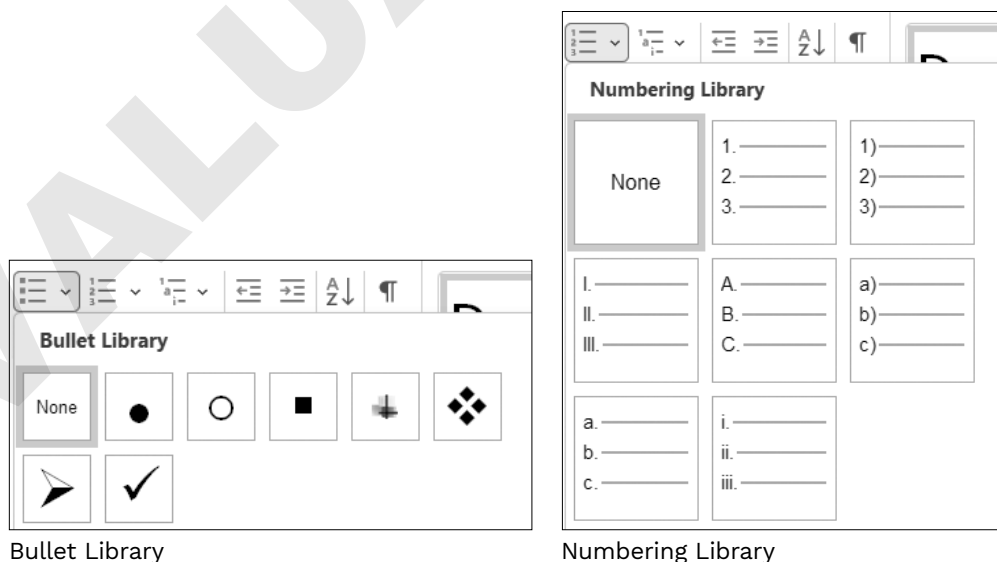
You can customize bullet styles by defining a symbol, picture, font, or alignment. You can customize numbering by defining style, font, format, and alignment.

Define New Bullet

Bullet character

| Symbol... | Picture... | Font... |

Alignment:

Left

Customize Bullet Format

Define New Number Format

Number format

Number style:

| 1, 2, 3, ... | | Font... |

Number format:

1.

Alignment:

Left

Customize Number Format

Home→Paragraph→Bullets

Home→Paragraph→Numbering

DEVELOP YOUR SKILLS: W7-D4

In this exercise, you will choose a different bullet style from the Bullet Library. Then you will create a custom bullet using a symbol as the new bullet style.

1. Open **W7-D4-SickKids** from your **Word Chapter 7** folder and save it as:
   W7-D4-SickKidsRevised

2. Scroll to page 4 and position the insertion point in the **Symptom #1** line.

3. Choose **Home→Paragraph→Bullets menu button** ⌄ and choose the square bullet (location may vary).

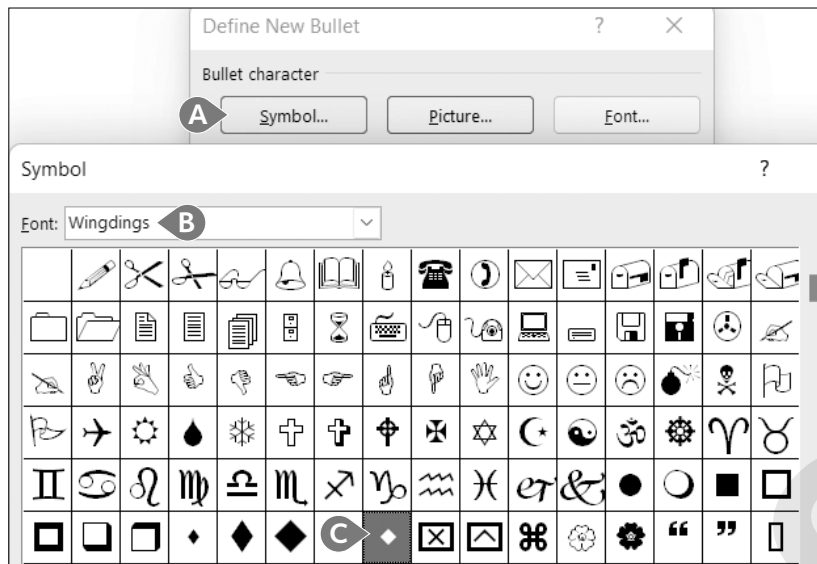**Bullet Library**

| None | ● | ○ | ■ |
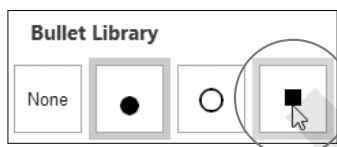
All the bullets in the list are updated. Next you will create a custom bullet.

4. Choose **Home→Paragraph→Bullets menu button** ⌄ and choose **Define New Bullet**.

5. Follow these steps to define a symbol as a new bullet:

A. Click the **Symbol** button to open the Symbol dialog box.

B. If necessary, choose the **Wingdings** font.

C. Make sure the scroll box is at the top of the scroll bar, choose this symbol (location may vary), and click **OK** twice.

Again, all of the bullets have changed to the custom bullet.

6. Choose **Home→Paragraph→Bullets menu button** ∨.

The new bullet was added to the library. Now you'll remove the bullet so the next student who uses your computer will have the same experience.

7. Right-click the new bullet in the Bullet Library area and choose **Remove**.

8. Display the Bullet Library again and notice the new bullet is removed from the Bullet Library area but remains under Recently Used Bullets; close the menu.

9. Save your file.

Using Special Characters

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

Insert→Symbols→Symbol Ω →Special Characters

DEVELOP YOUR SKILLS: W7-D5

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

1. Save your file as: **W7-D5-SickKidsRevised**

2. Scroll to page 3, locate the fifth line in the *Common Cold* paragraph, and position the insertion point after *Fred*.

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

3. Tap ⌑Delete⌑ to remove the space.

4. Choose **Insert→Symbols→Symbol** and then choose **More Symbols** from the menu.

5. Click the **Special Characters** tab in the Symbol dialog box and choose **Nonbreaking Space**.

6. Click the **Insert** button at the bottom of the dialog box and then click **Close**.

7. If necessary, display the formatting marks to see the character that represents a nonbreaking space.

8. Position the insertion point after the comma following the last name and ⌑Delete⌑ the space.

9. Choose **Insert→Symbols→Symbol→More Symbols**, click the **Special Characters** tab, and choose **Nonbreaking Space**.

   Notice the shortcut keystrokes for a nonbreaking space: ⌑Ctrl⌑+⌑Shift⌑+⌑Space⌑. *You can use the keystrokes for the remaining two names.*

10. Click the **Insert** button and then click **Close**.

11. Scroll to the sixth line in the next paragraph and notice the doctor's name that starts at the end of the line.

12. Position the insertion point after the *y* in *Jay* and tap ⌑Delete⌑.

13. Press ⌑Ctrl⌑+⌑Shift⌑+⌑Space⌑ to insert a nonbreaking space.

14. Use the same technique to replace the space following the comma after the last name with a nonbreaking space.

15. Locate Dr. Hirschenfang's name starting at the end of the sixth line in the *Influenza* paragraph and replace the space between *Dr.* and his last name with a nonbreaking space.

16. Save the file.

Navigating Long Documents

A number of helpful tools make it easier to navigate long, complex documents. The Navigation pane provides several ways to move around a document, while Advanced Find and wildcard characters enable specialized searches. Bookmarks are useful if you frequently need to return to the same location in a document. If you want to compare two separate parts of the same document, using the Split Window feature is a great way to do so.

The Navigation Pane

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

Search terms are entered here.

The arrows allow you to search up and down the document.
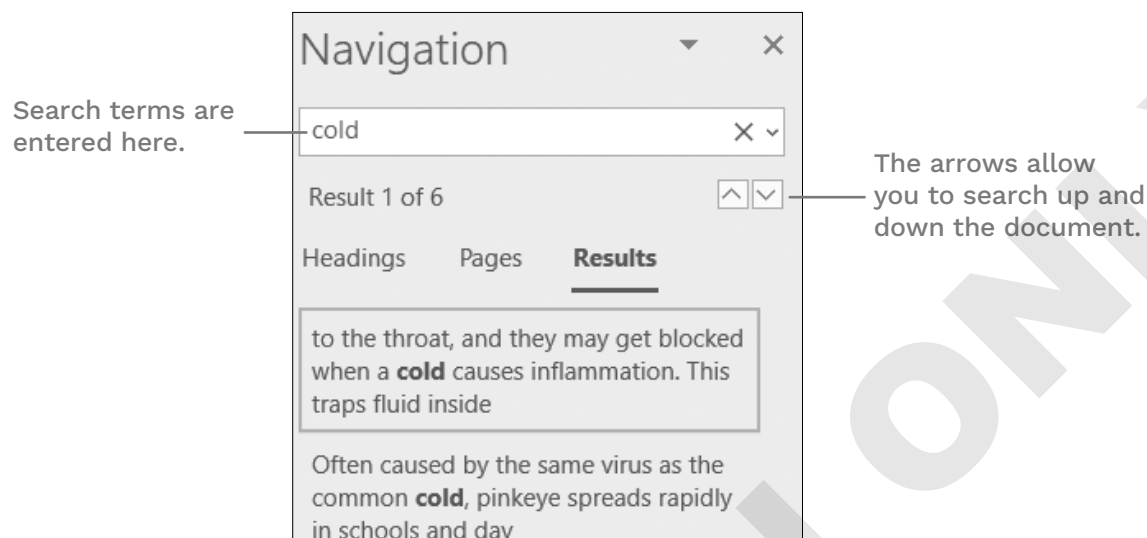
- **Headings:** The Headings option will list any heading styles in your document. If the search term appears within a heading, it will be highlighted. Click a heading to jump to that part of the document.
- **Pages:** The Pages option displays thumbnails of pages where the search term appears; clicking a thumbnail jumps the document to that page.
- **Results:** The Results option displays the search term in context; clicking one of the results jumps the document to that page.

View→Show→Navigation Pane | Ctrl + F

Advanced Find and Wildcard Characters

Word can conduct specialized searches. By default, the Find tool does not filter results based on capitalization or whole words only. To filter results based on capitalization or whole words, you can use Advanced Find. In addition, you can use wildcard characters when you're not sure exactly what you're looking for. For example, if you don't know exactly how a name in your document is spelled, but you know parts of it, you can search for it using wildcard characters in place of the parts you don't know.

The most common wildcard characters are the question mark (?) and the asterisk (*). The question mark can be used in place of a single unknown character, while the asterisk can be used in place of any number of characters.
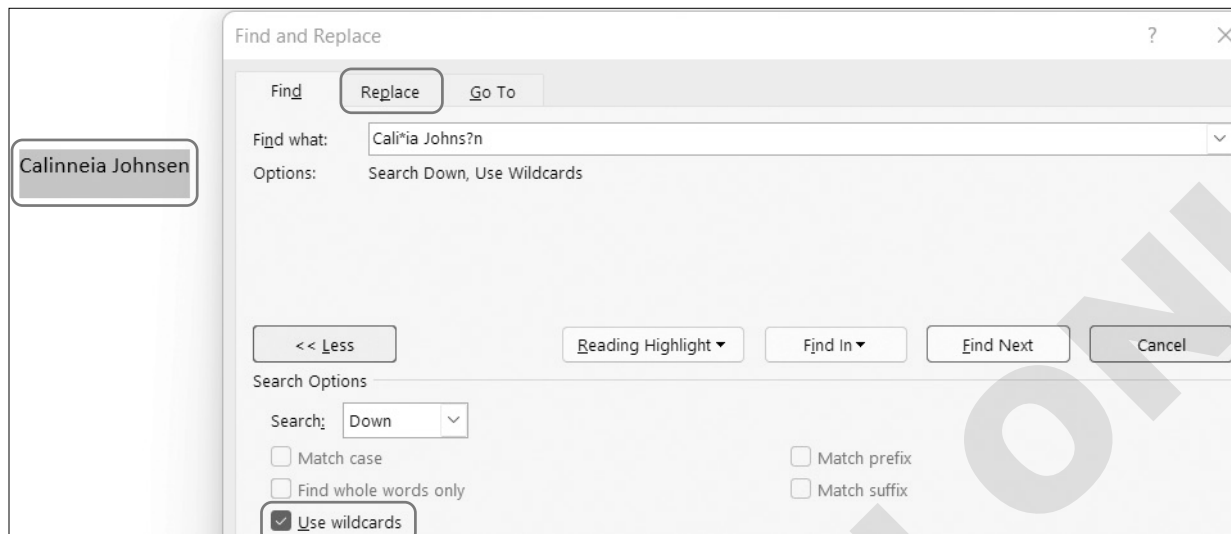
Home→Editing→Find menu button ⌄→Advanced Find 🔍
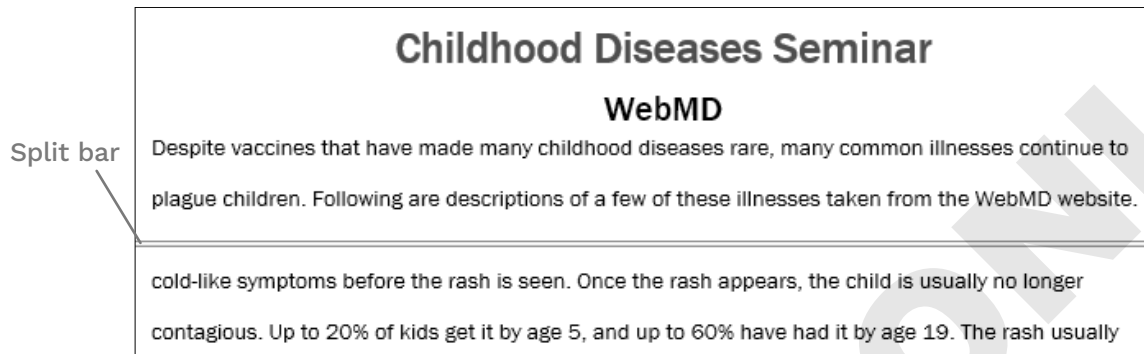
Bookmarks

You can assign a bookmark name to text or other objects in a document. Once a bookmark is set up, you can easily navigate to it by choosing the desired bookmark name from the Bookmark dialog box. A bookmark name can be up to 40 characters, including letters and numbers, but it must begin with a letter and cannot contain spaces or symbols.
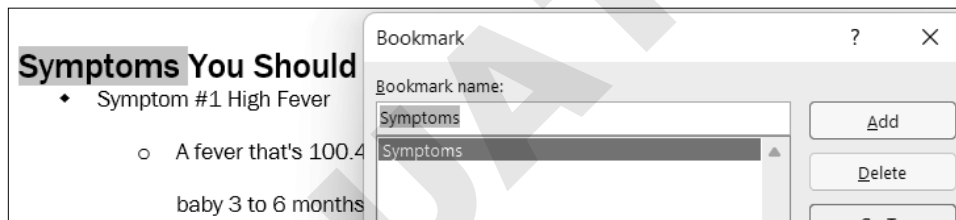
Insert→Links→Bookmark 🔖

The Split Window

Imagine you want to check whether the executive summary of a report accurately reflects the report's content. Splitting the window is the answer. You can view the executive summary in one window and scroll through the rest of the document in the other window. Once you've applied the split, you can click and drag the split bar to adjust the height of each window.

Split bar

Childhood Diseases Seminar

WebMD

Despite vaccines that have made many childhood diseases rare, many common illnesses continue to

plague children. Following are descriptions of a few of these illnesses taken from the WebMD website.

cold-like symptoms before the rash is seen. Once the rash appears, the child is usually no longer

contagious. Up to 20% of kids get it by age 5, and up to 60% have had it by age 19. The rash usually

View→Window→Split ▣

DEVELOP YOUR SKILLS: W7-D6

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

1. Save your file as: **W7-D6-SickKidsRevised**
2. Choose **View→Show→Navigation Pane** and enter **cold** as your search term.

TIP! You can also open the Navigation pane by pressing ⌃Ctrl+F.

3. Choose the **Results** option at the top of the Navigation pane and click the fourth result, **Common Cold**.

   The document jumps to that location. Notice that the term is highlighted in yellow wherever it appears.
4. Click the **Headings** option at the top of the Navigation pane.

   If the document contains heading styles, they are listed here. The headings where the search term appears are highlighted in yellow.
5. Click the **Ear Infection** heading to jump to that part of the document and notice again that the search term is highlighted in yellow.
6. Click the **Pages** option at the top of the pane to see thumbnails of the pages that contain the search term.
7. Click the second thumbnail to jump to that page.
8. Click the up and down arrows in the upper-right corner of the Navigation pane to scroll through all occurrences of the term.
9. Close the Navigation pane.

Use Bookmarks

10. Scroll to page 4 and select **Symptoms** in the heading titled *Symptoms You Should Never Ignore*.
11. Choose **Insert→Links→Bookmark**, type **Symptoms** in the Bookmark Name field, and click **Add**.

12. Press ⌈Ctrl⌉+⌈Home⌉ or scroll up to move to the top of the document.

13. Choose **Insert→Links→Bookmark**.

14. *Symptoms* is already selected, so click **Go To** to jump to the bookmarked text and then click **Close**.

Split the Window

15. Choose **View→Window→Split**.

   A split bar appears across the window. On the right-hand side of the screen are two scroll bars, one for the top window and one for the bottom window.

16. In the top window, scroll to the top of page 1; in the bottom window, scroll to the top of page 3.

   You can also split the window into different proportions, allowing more text to show on one side.

17. Position the mouse pointer on the split bar; when it changes to a double-headed arrow, drag the **split bar** up about an inch.

18. Double-click the **split bar** to return to one window.

19. Save and close the file.

Working with Large Tables

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

(Table) Layout→Cell Size dialog box launcher ⌐

(Table) Layout→Alignment→Cell Margins ▥

▌ DEVELOP YOUR SKILLS: W7-D7

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

1. Open **W7-D7-SeminarAttendees** from your **Word Chapter 7** folder and save it as: **W7-D7-SeminarAttendeesRevised**

   The text is wrapping in several columns, making it difficult to read. At the same time, the table already spans the width of the page. Rotating this document to landscape (horizontal) orientation and changing the table width should solve the problem.

2. Choose **Layout→Page Setup→Orientation** and then choose **Landscape**.

   In this step you used the general document Layout tab on the Ribbon. In the next step, you will use the contextual Layout tab that appears for tables.

3. Choose **(Table) Layout→Cell Size dialog box launcher**.

4. In the Table Properties dialog box, click the **Table** tab, if necessary.

5. Change Preferred Width to **9"** and click **OK**.

   Adding white space within the cells will add to the table's readability.

6. Choose **(Table) Layout→Alignment→Cell Margins**.

7. In the Table Options dialog box, change the top and bottom cell margins to **0.05** and click **OK**.

8. If necessary, position the insertion point in the first row of the table.

   This is the row that will repeat at the top of each page.

9. Choose **(Table) Layout→Cell Size dialog box launcher** and click the **Row** tab.

10. Place a checkmark in the **Repeat as header row at the top of each page** checkbox and click **OK**.

11. Scroll down to see the header row at the top of page 2.

    Now you will add a caption to the table.

12. Choose **References→Captions→Insert Caption** and then click the **New Label** button toward the bottom of the dialog box.

13. In the New Label dialog box, type `Childhood Diseases Seminar Attendees` and click **OK**; click **OK** again to close the Caption dialog box.

14. Scroll to the bottom of the document to see the caption.

    Captions are typically numbered, but because this is the only table in the document, numbering is not necessary.

15. If necessary, position the insertion point at the end of the caption and then tap ⌫Backspace twice to delete the number.

16. Save and close the file; exit Word.

Self-Assessment

Use the Self-Assessment quiz in the Student Resource Center to check your knowledge of the key concepts and skills introduced in this chapter.