

Microsoft Word

2000 - Tutorials
Author: Karyn Stille



You have downloaded the DEMO version of these tutorials and have the author's permission to distribute this demo freely. While the full table of contents is shown, only three tutorials are included.

Included in this DEMO:

CREATING TEMPLATES
CREATING A MAIL MERGE
WORD SHORTCUTS

If you like this demo, a low-priced full version can be purchased at:

Karyn's Toolkit: <http://tutorials.esmartweb.com/collection.htm>

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About the author...

Karyn Stille is an educator, software trainer, and Web site designer. In 1988, she obtained her Bachelor of Science degree in Education from Iowa State University. From there she headed south to Texas and taught in the public school system for nine years. While in the public school system, she saw a real need to educate not only children, but also adults on how to use the computer. Knowing the advantages of using the computer to make her life and work more efficient, coupled with her knowledge of computers, software and experience in education led her into corporate software training.

For the next four years, Karyn taught hundreds of executives and employees how to use Microsoft Office and other software products. Not only did she teach, but also tried her hand at technical writing and documentation of software procedures for clients. Eventually, she developed the desire to share her knowledge via the Internet, which enabled her to reach thousands more than she could ever reach in her current position.

Karyn took a contracting position and became a Guide with one of the largest information-based Web sites on the Net. Her position allowed her to instruct and advise thousands of people on business software via both the Web site and newsletters. The praise she received from site visitors and newsletter subscribers inspired her to write and publish this set of tutorials.

Today, Karyn is a stay-at-home mother of two young children and has migrated back to her home in Iowa. Her desire to stay at home and raise her family has taken her in yet another direction. Karyn still writes about software, but finds the creativity involved in developing Web sites a nice refuge from a busy day.

From Karyn:

"I hope you find this set of tutorials helpful and that you acquire some new skills that make your work more productive. I enjoy helping others, and welcome your feedback and questions. Feel free to email me!"

Karyn

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Creating Templates

A template allows a user to save document formats and text in a manner that makes it easy to use the document repeatedly without fear of the formats and text changing. Simply put, templates provide consistency, especially when multiple users need to use the same document format. When a document is based on a template, changes made in the document are saved in the document file, but the template remains in its original state to be used again.

Why not just keep changing the same document every time? Too often a user clicks the **Save** button without remembering to save the document under a different name. Once that happens, any of the original formats and text that may have been changed for the current document are lost.

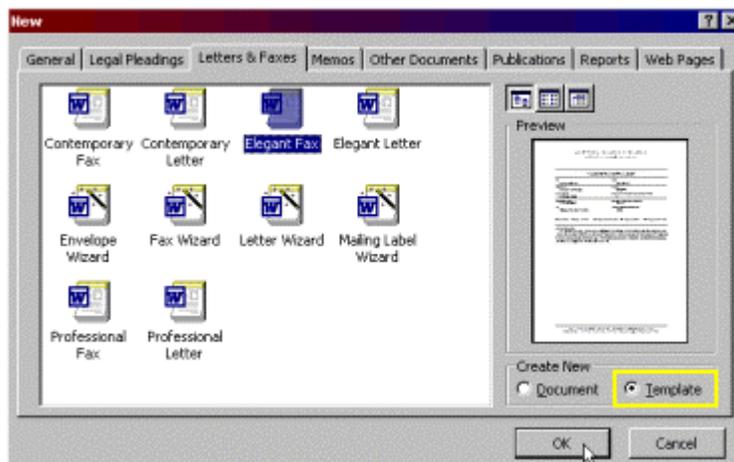
There are two ways to create a template in Word. You can create a template based on one of the many templates already available in Word, or you can create your own from scratch.

Using an Existing Template

There are many useful pre-designed templates already available in Word that can be used to create a new template. Many additional templates can also be downloaded free of charge from the Microsoft Website (<http://www.microsoft.com>).

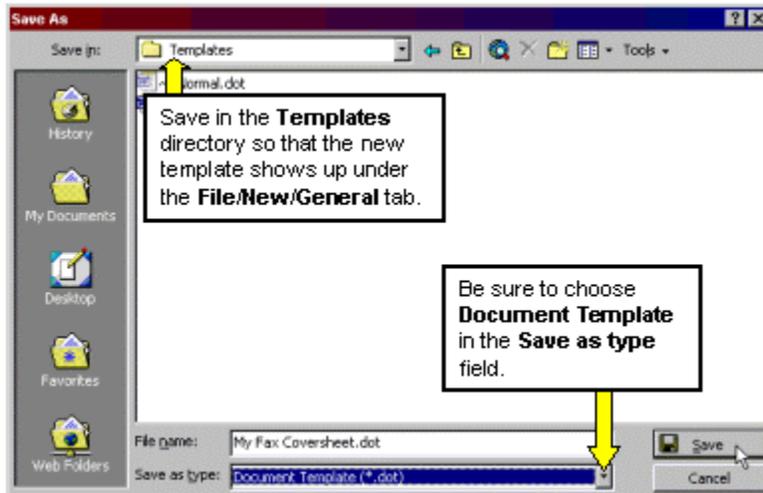
To base your template on an existing template:

1. From the **File** menu, choose **New**.



2. Select a template from the various tabs in the **New** dialog box.
3. In the **Create New** field, select **Template**.
4. Choose **OK**.

5. The new template opens. Make any necessary text and formatting changes to the template in the same manner as you would make changes in a document.
6. When you are finished making changes to suit your needs, from the **File** menu, choose **Save**. You have opened a new template that awaits a name, so there is no need to worry about overwriting the original template with your new one by choosing **File/Save** or the **Save** button.
7. The **Save** dialog box opens to the **Templates** folder. By saving your template in the **Templates** folder, you can easily create a document based on your new template by finding it under the **General** tab in the **File/New** dialog box.
8. Type a name for your template and choose **Save**.



Creating a Template from Scratch

Creating a template from scratch is easy! In a regular blank document, insert text and apply formatting as you would any document. You may want to include blank lines or spaces where information needs to be filled in. You can also use form fields, which you may have noticed in some of the existing templates that are packaged with Word. Here are some bare bones basics that can be used to create simple form fields in your templates:

Using a text form field:

1. Right-click on any existing toolbar, and choose **Forms** from the toolbar menu. The **Forms** toolbar is displayed as below. You can also choose to display this toolbar by selecting **Toolbars** and **Forms** from the **View** menu.

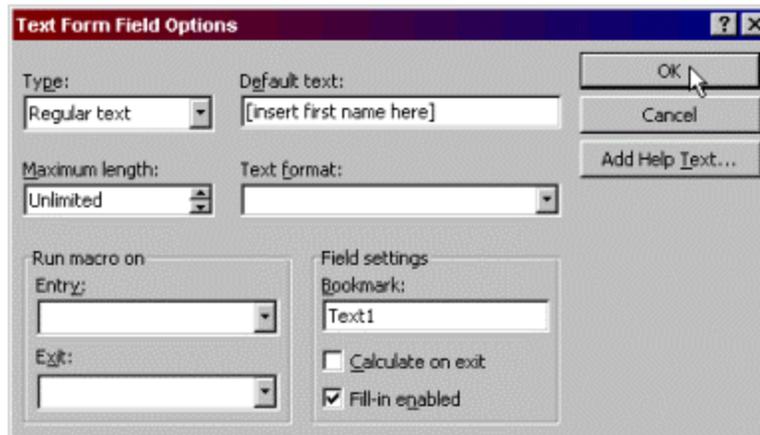


2. Place the insertion point at the location where you need to insert a field. Choose the **Text Form Field** button from the **Forms** toolbar. A gray blank is inserted in the document.
3. Double-click on the gray blank to choose options for your text form field. It is helpful to insert default text in template form fields so the user of the template knows what type of data to insert in the field. Note that the gray areas do not show when printed, however, text entered into the gray areas does. Take a look at the following simple example:

Dear [insert first name here],

It has come to our attention that your payment in the amount of [total amount due] which was due on [payment due date] has not yet been received by our office. Please remit the total amount due by [final payment date] to avoid cancellation of your services. If you have already made this payment, please disregard this letter.

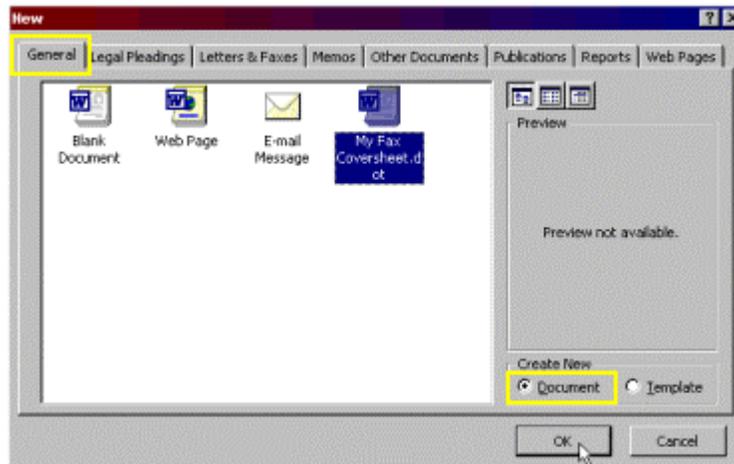
The default text, such as "[insert first name here]", was typed into the **Text Form Field Options** dialog box as shown below.



At a glance, anyone that is using the sample template above can see areas that need to be filled in and also knows what to enter into each field.

4. Once the document is formatted to your liking, from the **File** menu, choose **Save**.
5. Choose **Document Template** in the **Save as type** field. In Word 2000, you are automatically directed to the **Templates** folder.
6. Type a name for your template and choose **Save**.

By saving in the **Templates** folder, your template appears under the **File/New/General** tab, as below.



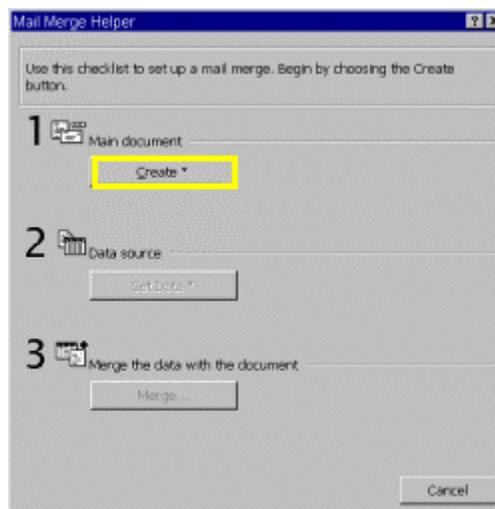
To create a document based on your template, simply be sure that **Document** is selected in the **Create New** field.

Creating a Mail Merge

When sending out a specific letter to a group of people, it is sometimes easier to create a mail merge that automatically places addresses, names, and personal greetings in the letters, rather than having to manually address or retype names in the body of the letter. Let's explore creating a mail merge from scratch.

Step 1: Creating a Main Document

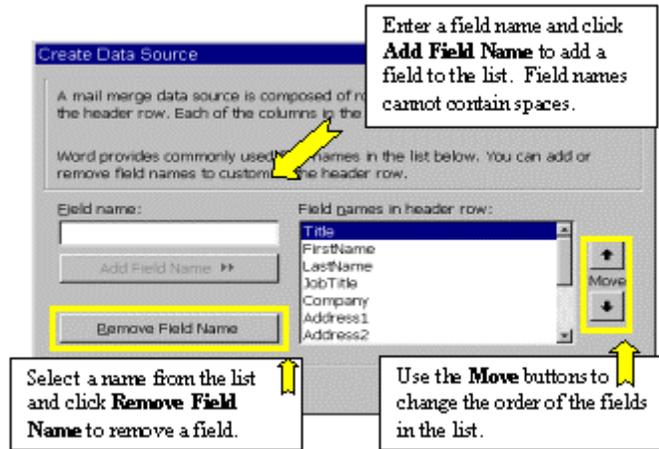
1. To start a mail merge from scratch, click the **New** page button in the **Standard** toolbar. The new blank page will be the main document (letter) with which the data source will be merged. The data source contains the actual names, titles, addresses, etc.
2. From the **Tools** menu, choose **Mail Merge**. The **Mail Merge Helper** appears as shown below.



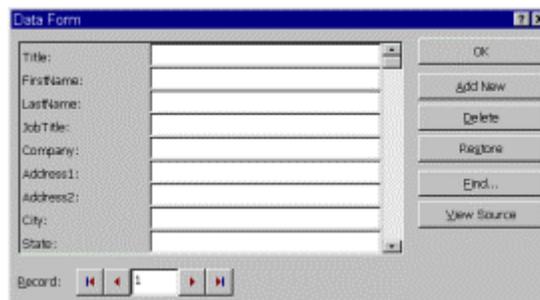
3. In step 1, choose **Create** and select a document type. A message box appears asking if you want to use the document in the active window or create a new one. Choose **Active Window**.

Step 2: Creating a Data Source

1. In the **Mail Merge Helper** dialog box, choose **Get Data** (step 2) and select **Create Data Source**. The **Create Data Source** dialog box appears as in the figure below.



2. Add and remove field names from the **Field names in header row** list as described above. When finished, choose **OK**.
3. Enter a filename for the data source in the save box that is displayed, and choose **OK**.
4. When the message box appears, choose **Edit Data Source** to display the first blank data form.
5. In the **Data Form**, as shown below, enter the records by typing information into the fields. Use the **Tab** key to move between fields. Choose the **Add New** button after completing a record to display a new blank record. When finished entering records, choose **OK**.

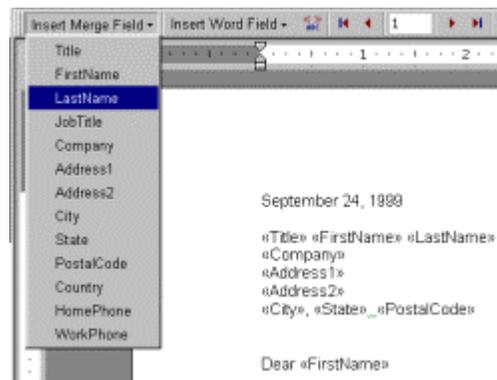


Step 3: Completing the Main Document

Completing the main document involves adding the necessary fields from your data source and finishing the typing of your document. Entering standard text into this document is accomplished by following the same methods used to enter text into any other type of document. However, Word adds a special **Mail Merge** toolbar to the top of the screen to allow you to insert the data source fields and complete the merge.

Inserting Data Source Fields

1. Move the insertion point to the location for the first field.
2. Choose the **Insert Merge Field** button on the **Mail Merge** toolbar.
3. Select the appropriate field name from the list, as shown in the figure below.



4. Continue typing the document, inserting fields where necessary. Be sure to include spaces and other punctuation in appropriate places along with the field names. For example, you will want to place a comma and a space after the **City** field in an address.

Note: You can change the font used for a field name just like you can change the font for any text in the document. To do this, select the field name and change the font and its attributes with either the formatting toolbar or the **Format/Font** dialog box.

Step 4: Merging Data with the Main Document

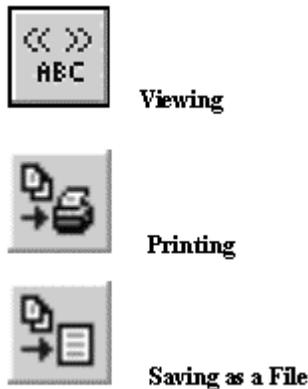
Once the document is finished, you are ready to merge the data source with the document. The fields will be replaced with the data from your data source. You can either merge directly to the printer or merge to a file to print later. You can also preview your documents. This will allow you to make any necessary adjustments before actually printing or saving.

Be sure that the main document is displayed. The **Mail Merge** toolbar displays on the screen whenever a main document is open.

Choose the **View Merged Data** button to preview the resulting documents on the screen.

Choose the **Merge to Printer** button to send the resulting documents directly to the printer.

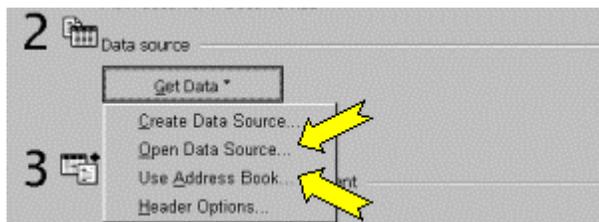
Choose the **Merge to New Document** button to display the resulting documents in a single file for saving.



Alternative Data Sources

Word also allows you to use other data sources that have been created in other applications. For example, you may have an Excel spreadsheet that already lists all of your employees and their addresses, or you may want to use the Contact list from Outlook.

To do this, in step 2 of the **Mail Merge Helper** dialog box, as shown below, choose **Get Data**.

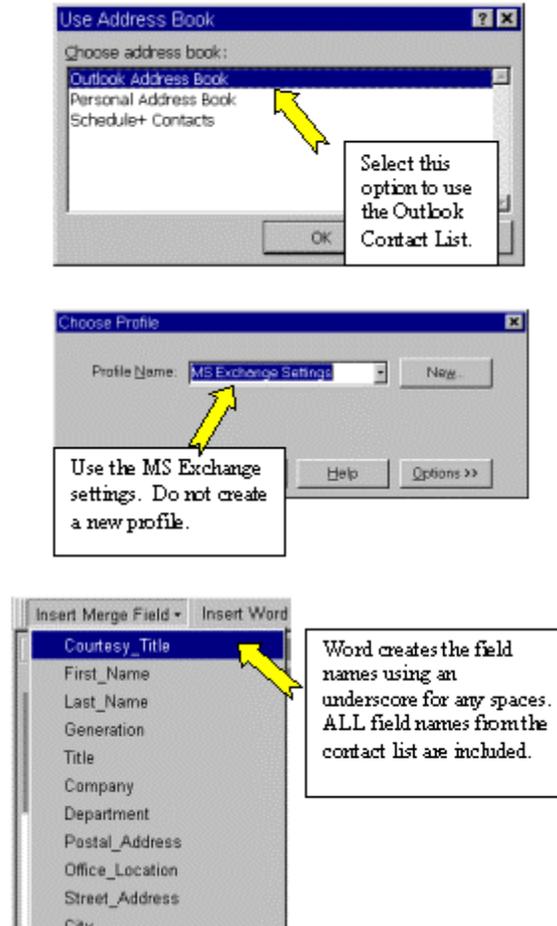


Select **Open Data Source** to use a file from another program such as Excel.

Select **Use Address Book** to use other sources such as your Outlook Contact List.

Once you have chosen the data source, Word creates the appropriate field names that can be inserted into the main document with the **Mail Merge** toolbar.

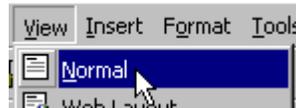
In the following example, we have chosen **Use Address Book** to use our Contact list from Outlook. The steps are displayed in the following figures.



Note: When a data source from another application is used (like Excel), the data source is linked to that application. In other words, when information is updated in that application, the data source is updated as well.

Word Shortcuts

Most of the keyboard shortcuts listed here are quick shortcuts Microsoft has assigned to common tasks. More keyboard shortcuts for menu items can be performed using the **[Alt]** key. Simply press and hold **[Alt]**, press the underlined letter of the menu you wish to access, then press the underlined letter(s) corresponding to the menu task you wish to complete. For example, the keyboard shortcut for viewing a document in **Normal** view would be, **[Alt] + [V] + [N]**:



The first table is an extensive list of menu, keyboard, and toolbar shortcuts. The second table is a list of additional actions and keyboard shortcuts that I've found very useful over time.

Table 1: Menu, Keyboard, Toolbar

Menu	Keyboard	Toolbar
File, New	[Ctrl] + [N]	
File, Open	[Ctrl] + [O]	
File, Close	[Ctrl] + [W] or [Ctrl] + [F4]	
File, Save	[Ctrl] + [S]	
File, Print	[Ctrl] + [P]	
File, Exit	[Alt] + [F4]	
File, Send To, Mail Recipient	[Alt] + [F] + [D] + [M]	
Edit, Undo	[Ctrl] + [Z]	
Edit, Redo	[Ctrl] + [Y]	
Edit, Cut	[Ctrl] + [X]	
Edit, Copy	[Ctrl] + [C] or [Ctrl] + [Insert]	

Menu	Keyboard	Toolbar
Edit, Paste	[Ctrl] + [V] or [Shift] + [Insert]	
Edit, Select All	[Ctrl] + [A]	
Edit, Find	[Ctrl] + [F]	
Edit, Replace	[Ctrl] + [H]	
Format, Borders and Shading (borders)	[Alt] + [O] + [B]	
Format, Font	[Alt] + [O] + [F] + [F]	Times New Roman ▾
Format, Font (size)	[Alt] + [O] + [F] + [S]	12 ▾
Format, Font (bold)	[Ctrl] + [B] (toggles on and off)	B
Format, Font (underline)	[Ctrl] + [U] (toggles on and off)	<u>U</u>
Format, Font (italics)	[Ctrl] + [I] (toggles on and off)	<i>I</i>
Format, Font (color)	[Alt] + [O] + [F] + [C]	
Format, Paragraph (left align)	[Ctrl] + [L]	
Format, Paragraph (center align)	[Ctrl] + [E]	
Format, Paragraph (right align)	[Ctrl] + [R]	
Format, Paragraph (justify)	[Ctrl] + [J]	

Menu	Keyboard	Toolbar
Format, Paragraph (increase left indent)	[Ctrl] + [M]	
Format, Paragraph (decrease left indent)	[Ctrl] + [Shift] + [M]	
Format, Paragraph (single line spacing)	[Ctrl] + [1]	
Format, Paragraph (double line spacing)	[Ctrl] + [2]	
Format, Paragraph (1.5 line spacing)	[Ctrl] + [5]	
Format, Columns	[Alt] + [O] + [C]	
Insert, AutoText, New	[Alt] + [F3]	
Insert, Hyperlink	[Ctrl] + [K]	
Help, Microsoft Word Help	[F1]	
Help, What's this?	[Shift] + [F1]	 (in corner of dialog boxes)
Table, Insert Table	[Alt] + [I] + [T]	
Table, Insert Rows (above selected row)	[Alt] + [A] + [I] + [A]	
Tools, Spelling and Grammar	[F7]	
Tools, Language, Thesaurus	[Shift] + [F7]	

Menu	Keyboard	Toolbar
Tools, Macro, Macros	[Alt] + [F8]	
Tools, Track Changes	[Ctrl] + [Shift] + [E]	
View, Document Map	[Alt] + [V] + [D]	
View, Toolbars, Tables and Borders	[Alt] + [V] + [T]	
View, Toolbars, Drawing	[Alt] + [V] + [T]	
View, Zoom	[Alt] + V + [Z]	
View, Normal	[Alt] + [V] + [N]	 on horizontal scrollbar
View, Print Layout	[Alt] + [V] + [P]	 on horizontal scrollbar
View, Web Layout	[Alt] + [V] + [W]	 on horizontal scrollbar
View, Outline	[Alt] + [V] + [O]	 on horizontal scrollbar

Table 2: Action, Keyboard

Action	Keyboard
Select the document. Then use this shortcut to increase the font size of all fonts.	[Ctrl] + [Shift] + [>]
Select the document. Then use this shortcut to decrease the font size of all fonts.	[Ctrl] + [Shift] + [<]
File, Save as	[F12]
File, Save	[Shift] + [F12]
Insert page break	[Ctrl] + [Enter]
Increase font by 1	[Ctrl] +]
Decrease font by 1	[Ctrl] + [
Jump to extreme lower right of document	[Ctrl] + [End]
Jump to extreme upper left of document	[Ctrl] + [Home]
Show/Hide non-printing characters	[Ctrl] + [Shift] + [8] OR on Standard toolbar
Superscript	[Ctrl] + [Shift] + [=]
Subscript	[Ctrl] + [=]
Undo formatting	[Ctrl] + [Q]
Reset font size to default	[Ctrl] + [Shift] + [P]
Reset to default font face	[Ctrl] + [Shift] + [F]
En dash	[Ctrl] and [-] (on numeric keypad)
Em dash	[Alt] + [Ctrl] + [-] (on numeric keypad)
Minimize all applications to taskbar	[Windows] + [M]
Open Windows Explorer to find files	[Windows] + [E]
Non-breaking hyphen	[Ctrl] + [_]
Non-breaking space	[Ctrl] + [Shift] + [Space]

Action	Keyboard
Copyright symbol	[Alt] + [Ctrl] + [C]
Trademark symbol	[Alt] + [Ctrl] + [T]
Print dialog box	[Ctrl] + [Shift] + [F12]
Double underline	[Ctrl] + [Shift] + [D]
Delete a whole word at a time	[Ctrl] + [Backspace]
Move to previous page	[Ctrl] + [Page Up] OR on vertical scrollbar
Move to next page	[Ctrl] + [Page Down] OR on vertical scrollbar
Select Browse Object - browse document by tables, graphics, etc.	on vertical scrollbar
Increase hanging indent	[Ctrl] + [T]
Decrease hanging indent	[Ctrl] + [Shift] + [T]
Selects entire table	[Alt] + [5] (on numeric keypad w/Num Lock off)
Remove all formatting	[Ctrl] + [Shift] + [Z] (resets to defaults)
Close all open files	Press and hold [Shift] From the File menu, choose Close All