

# Student Guide

40570A

Microsoft Word expert 2019

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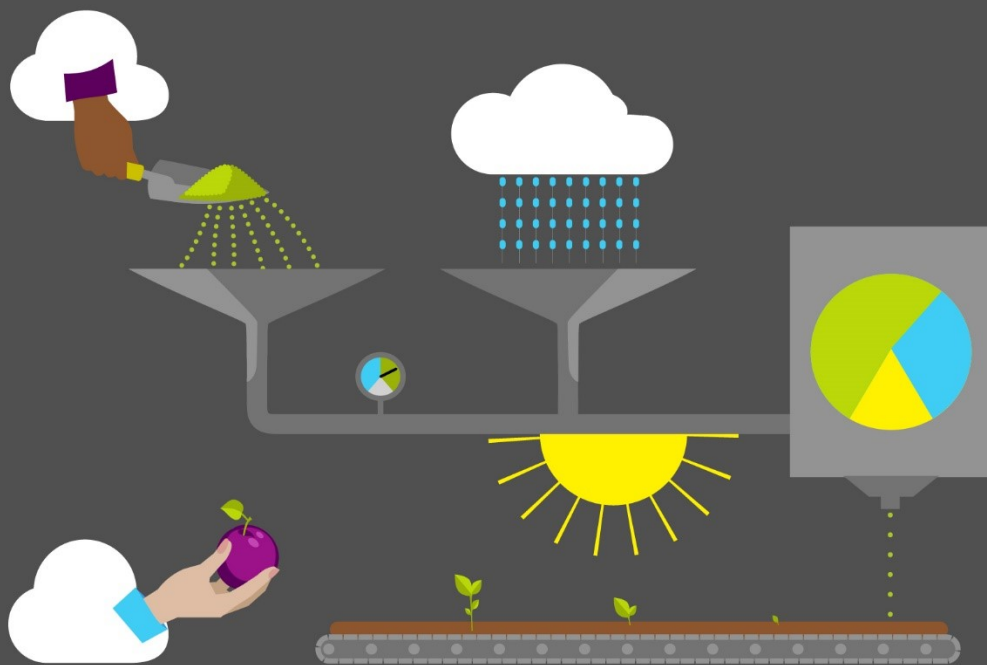
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Microsoft Word expert 2019

Module 1: Updating Word settings

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# Module overview

## Description

This module consists of three lessons that help you to learn how to use some of the advanced features of Microsoft Word 2019. By the end of this module, you will be able to enable macros, change default font, customize the **Quick Access Toolbar** and ribbon tab, configure editing and display languages, and use the language-specific features available in Word.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Enabling macros and changing the default font	Enable macros and change the Normal template default font.	<ul style="list-style-type: none"> <li>• 1.1.5</li> <li>• 1.1.8</li> </ul>
Customizing toolbars and tabs	Customize the Quick Access Toolbar and ribbon tab.	<ul style="list-style-type: none"> <li>• 1.1.6</li> <li>• 1.1.7</li> </ul>
Configuring languages and using language features	Configure and use language-specific features.	<ul style="list-style-type: none"> <li>• 1.3.1</li> <li>• 1.3.2</li> </ul>
Cornerstone: Configuring options and settings	Enable macros in an existing document, translate words and phrases into other languages, and check them for spelling and grammar. Customize the <b>Quick Access Toolbar</b> and ribbon tab.	<ul style="list-style-type: none"> <li>• 1.1.5</li> <li>• 1.1.6</li> <li>• 1.1.7</li> <li>• 1.1.8</li> <li>• 1.3.1</li> <li>• 1.3.2</li> </ul>

Table 1: Objectives by lesson

# Scenario

Munson's Pickles and Preserves Farm would like to offer their community supported agriculture (CSA) program materials in several different languages, as people in their community speak a wide variety of languages. The language options in Microsoft Word need to be configured on your computer so that grammar and spelling can be checked in other languages as you work on company documents.

Your first task as a new employee is to make sure your computer has the appropriate settings configured to enable macros in documents that you'll be working with, configure the **Quick Access Toolbar** and the ribbon, and set up language editing and display options as requested by your manager. Setting up and configuring Word in this way is the first step toward accessing and using the advanced features of Word that you will use later to improve your productivity and expertise.

# Cornerstone

In this cornerstone, you will use the background information for the Munson's Pickles and Preserves Farm to create a social media message for their new CSA program by changing the Normal template default font and then creating a new document. You will create a copy of your message for the Dutch- and Filipino-speaking customers, then wow your co-workers by creating a custom ribbon with your favorite commands.

# Lesson 1: Enabling macros and changing the default font

## Overview

In this lesson, you'll learn how to enable macros in a document and change the default font in the Normal template. You'll participate in discussions and step-by-step demonstrations, and you'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Macros are used to:

*Select the correct option.*

- a. Lock a document
- b. Automatically recover documents
- c. Perform repetitive work
- d. Do work that is not performed daily

2. If you create a document with a macro and you want to save the document to include the macro, you must save the document in which file format?

*Select the correct option.*

- a. docx
- b. doct
- c. dotx
- d. docm

3. You sometimes want to set your font preference when you work on a document. To do this, you must customize the \_\_\_\_\_.

*Fill in the blank space.*

# Topic 1: Enable macros



Creating macros in documents and applications can assist you in saving time when completing repetitive tasks throughout the day. You might sometimes receive a document with an embedded macro. When this happens, if the document comes from a trusted source, you can enable the macro. This will allow you to work with the document and the macro embedded within it. In this topic, you will practice enabling macros in two different ways: in the message bar or in the **Backstage** view for more advanced features.

## Enable macros when the message bar appears

When you open a file that includes macros, a yellow message bar appears, as depicted in the following screenshot, with a shield icon and the **Enable Content** button.

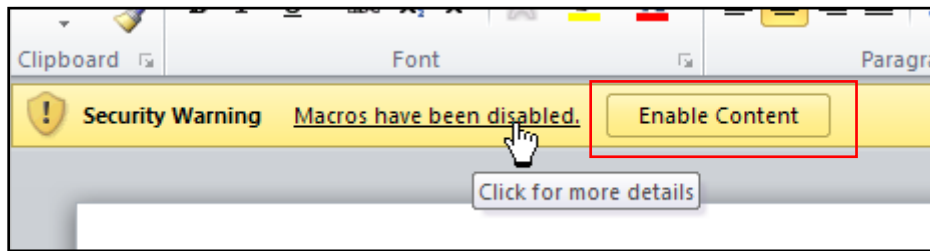


Figure 1: **Enable Content** button on the macro message bar

If you know that the macro or macros are from a reliable source, select **Enable Content**. The file opens and becomes a trusted document.

## Enable macros in the Backstage view

Another method to enable macros in a file is via the Microsoft Office Backstage view, a view that appears after you select the **File** tab. To enable macros in a document from the Backstage view, you need to perform the following steps:

1. Select the **File** tab.
2. In the **Security Warning** area, select **Enable Content**.
3. Under **Enable Content**, select **Enable All Content**.

The file becomes a trusted document. The following screenshot depicts the Security Warning setting.



Figure 2: **Security Warning** setting

## Change macro settings in the Trust Center from the Backstage view

Macro settings are in the Trust Center. The Trust Center is where you can find the security and privacy settings for Microsoft Office programs. If you work in an organization, the system administrator might change the default security and privacy settings. To change the macro settings, you need to perform the following steps:

1. Select the **File** tab.
2. Select **Options**.
3. Select **Trust Center**, and then select **Trust Center Settings**.
4. In the **Trust Center** window, select **Macro Settings**.
5. Make the selections that you want, as depicted in the following screenshot.

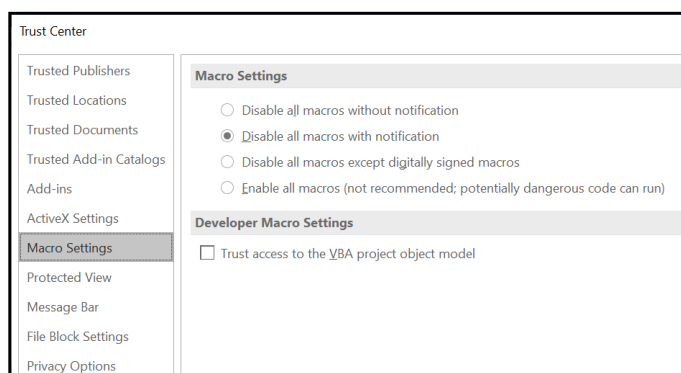
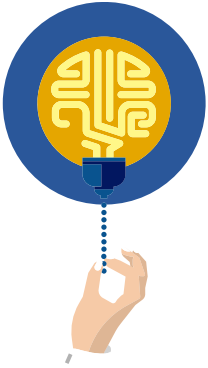


Figure 3: **Trust Center** window

6. Select **OK**.



### Did you know?

When you change your macro settings in the **Trust Center**, they change only for the Office program that you are currently using.



### Additional information

For more information on enabling or disabling macros in Office files, go to: [Enable or disable macros in Office files](#)

---

## Activity: Show me how

In this activity, you'll follow a step-by-step demonstration on how to enable macros and change the macro settings in the Trust Center.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrate how to enable macros in a document.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Enable macros



In this leveled try-it activity, you'll practice enabling the embedded macros in a document and changing the macro settings in the Trust Center.

### Try-it 1

In this try-it, you will enable macros in a document from the message bar.

## Resources

You will need the following resource for this try-it:

- Open **L1\_T1\_try1\_background\_starter.docm** in this lesson's Learning Activity Resources.

## Instructions

The following is the general task that you need to perform during this try-it:

- Enable the macros in the document from the message bar.

## Try-it 2

In this try-it, you will enable macros in a document from the **Backstage** view.

## Resources

You will need the following resource for this try-it:

- Open **L1\_T1\_try2\_background\_starter.docm** in this lesson's Learning Activity Resources.

## Instructions

The following is the general task that you need to perform during this try-it:

- Enable the macros in the document in the **Backstage** view.

## Try-it 3

In this try-it, you will enable macros in a document from the **Backstage** view and view the macro settings in the **Trust Center**.

## Resources

You will need the following resource for this try-it:

- Open **L1\_T1\_try3\_background\_starter.docm** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Use the **L1\_T1\_try3\_background\_starter.docm** file to enable macros in the **Backstage** view.
2. Review the macro settings in the **Trust Center**.

3. Insert a header with the text, **Munson's Pickles and Preserves Farm's CSA social media message**.
4. Insert a footer with the date.

## Topic 2: Change the default font



As you work on documents, you might want to set your font preferences. Word allows you to do this by customizing the default font in the **Normal template**.

To change the default font in the **Normal template**, you need to perform the following steps:

1. On the **Home** tab, select the **Font Dialog Box Launcher**.
2. Select the font and size you want to use.
3. Select **Set As Default**. The following screenshot depicts the **Set As Default** button that is available in the **Font** dialog box.

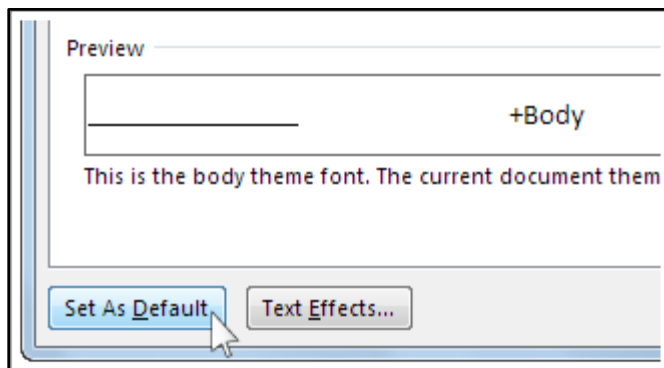


Figure 4: **Set As Default** button

4. Select one of the following:
  - **This document only**
  - **All documents based on the Normal template**
5. Select **OK** twice.



### Additional information

For more information on changing the default font in Word, go to: [Change the default font in Word](#)



## Activity: Guess and tell

In this activity, you will explore Word to find the location where you can change the default font.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Pair with a classmate and discuss why you would want to change the default font.
2. With your partner, search where in Word you can change the default font.

## Try-it: Change the default font



In this leveled try-it activity, you will change the default font and use it in your work.

### Try-it 1

In this try-it, you will change the default font.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Change the default font to **12-point Cambria** to align with **Munson's Pickles and Preserves Farm** corporate document requirements.
3. Open a new document and enter your name and date.
4. Ensure the default font has changed.
5. Save and close the document.

### Try-it 2

In this try-it, you will change the default font and then explain how to change the default font.

## Resources

None

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Change the default font to **12-point Cambria** to align with **Munson's Pickles and Preserves Farm** corporate document requirements.
3. Open a new blank document and enter the steps to change the default font.
4. Ensure the default font has changed.
5. Save and close the document.

## Try-it 3

In this try-it, you will change the default font and then explain why and how to change the default font.

## Resources

None

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Change the default font to **12-point Cambria** to align with **Munson's Pickles and Preserves Farm** corporate document requirements.
3. Create a letter to your co-workers explaining why and how to change their default font.
4. Save and close the document.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. You have a document in which you constantly change the font from 11-point to 12-point as per your company policy. How can you set your documents to use 12-point font in a new document?

*Select the correct option.*

- a. Change the font size on the **Home** tab.
  - b. Record a macro.
  - c. Change the default font.
  - d. Create a new style in the **Styles** gallery.
2. You received a document from your coworker to edit. However, when you attempted to open it, you received a security warning. What should you do?

*Select all that apply.*

- a. Enable macros from the message bar.
  - b. Disable the macros because you will not use them.
  - c. Send the document back to your coworker to fix the security warning.
  - d. Enable the macros from the Backstage view.
3. The \_\_\_\_\_ is where you can find the security and privacy settings for Office programs.

*Fill in the blank space.*

# Lesson 2: Customizing toolbars and tabs

## Overview

In this lesson, you'll learn how to easily access the frequently used commands by customizing your **Quick Access Toolbar** and the ribbon tabs. You'll participate in discussions, follow step-by-step demonstrations, and explore where to find additional options and tools.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. The **Quick Access Toolbar**:

*Select all that apply.*

- a. Is independent of any other ribbon tab.
- b. Can be anchored above the ribbon or below the ribbon.
- c. Is customizable to include frequently used tools.
- d. Can be anchored on a specific ribbon tab.

2. The \_\_\_\_\_ can be anchored either above or below the ribbon.

*Fill in the blank space.*

3. You can find the **Customize the Ribbon** option at which two places?

*Select all that apply.*

- a. On the **Insert** tab
- b. By right-clicking or accessing the context menu on any ribbon tab
- c. In the **Backstage Properties**
- d. By selecting **File** and **Options**

4. You can customize the **ribbon** groups in what two ways?

*Select all that apply.*

- a. You can create, add, or delete command buttons.
- b. You can provide animation for command buttons.
- c. You can group command buttons together for ease of use.
- d. You can color-code command buttons on the ribbon.

## Topic 1: Customize the Quick Access Toolbar



Wouldn't it be great to keep your frequently used commands close to your document and easily access them no matter which tab you have open? Just think of how much time you could save by having commands that you frequently use at one location.

The **Quick Access Toolbar** is a customizable toolbar that contains a set of commands that are independent of the tab or the ribbon that is currently displayed. The following screenshot depicts the **Quick Access Toolbar**.



Figure 5: **Quick Access Toolbar**

You can customize the **Quick Access Toolbar** in several ways.

### Add a command to the Quick Access Toolbar

1. On the ribbon, select the appropriate tab or group to display the command that you want to add to the **Quick Access Toolbar**.
2. Right-click the command, and then select **Add to Quick Access Toolbar** on the shortcut menu. The following screenshot depicts the **Add to Quick Access Toolbar** option.

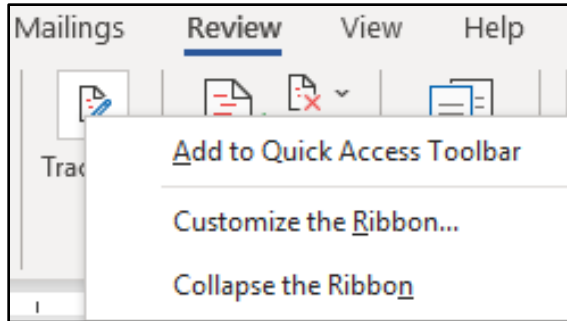


Figure 6: **Add to Quick Access Toolbar** option

## Add a command to the Quick Access Toolbar that isn't on the ribbon

1. Select **Customize Quick Access Toolbar, More Commands**, as depicted in the following screenshot.

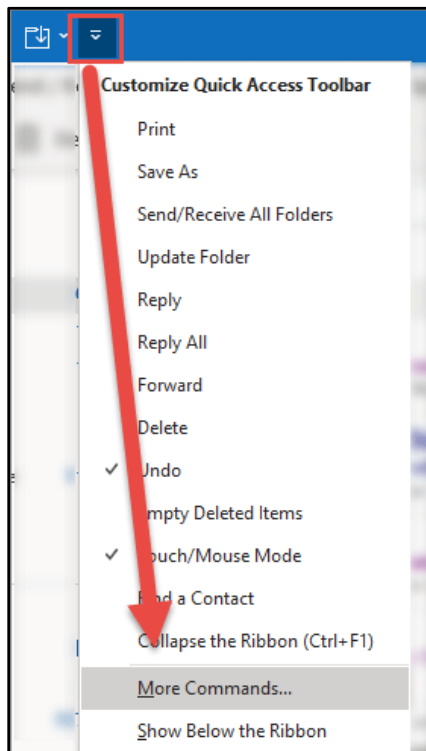
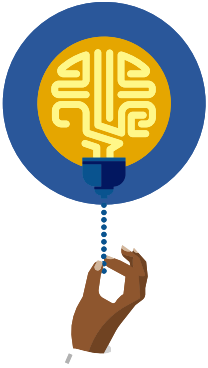


Figure 7: **More Commands** option

2. In the **Choose commands from** list, select **Commands Not in the Ribbon**.
3. Locate the command in the list, and then select **Add**.



**Did you know?**

If you can't locate the command you want, try setting **Choose commands from** to **All commands**.

## Change the order, add, or remove commands on the Quick Access Toolbar

1. Right-click the **Quick Access Toolbar**, and then select **Customize Quick Access Toolbar...** on the shortcut menu.
2. In the **Word Options** dialog box, under **Customize Quick Access Toolbar**, select the command you want to move, add, or remove, and then select the **Move Up** or **Move Down** arrow, **Add**, or **Remove**. The following screenshot depicts the features within the **Word Options** dialog box.

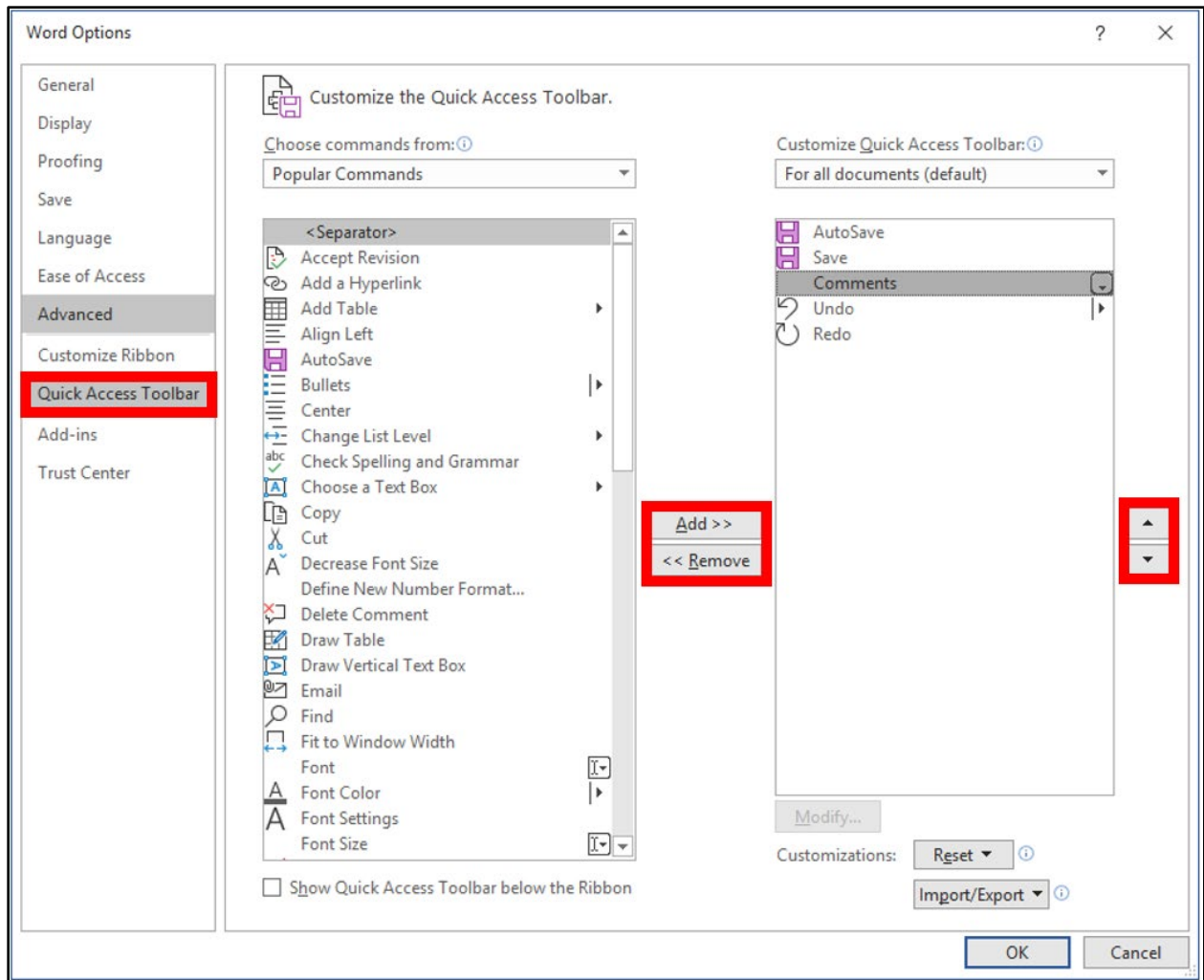


Figure 8: **Word Options** dialog box

## Move the Quick Access Toolbar

The **Quick Access Toolbar** can be moved to one of two places:

- Upper-left corner, on the title bar, as depicted in the following screenshot.

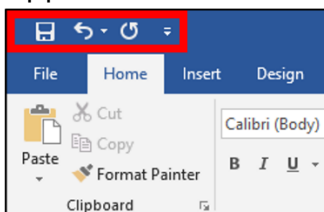


Figure 9: **Quick Access Toolbar** positioned to the upper-left corner of the title bar



- Below the ribbon, as depicted in the following screenshot.

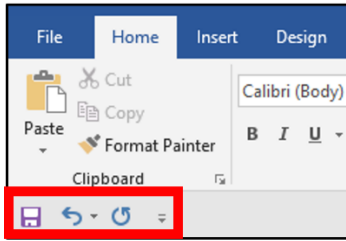


Figure 10: **Quick Access Toolbar** moved below the ribbon

- To move the **Quick Access Toolbar**, select **Customize Quick Access Toolbar...** (on the right end of the **Quick Access Toolbar**).
- From the **Customize the Quick Access Toolbar** list, select **Show Below the Ribbon** or **Show Above the Ribbon**.



#### Additional Information

For more information on customizing the **Quick Access Toolbar**, go to: [Customize the Quick Access Toolbar](#).

---

## Activity: Discuss and learn

In this activity, you'll participate in a teacher-led group discussion on Word commands that you frequently use. Then you will explore the Backstage view to discover how to move the **Quick Access Toolbar** and add, remove, and change the order of commands on the **Quick Access Toolbar**.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

- Ask the teacher clarifying questions.
- Participate in the discussion.
- Open a blank document.

4. Go to the **Backstage** view, select **Options**, and then **Quick Access Toolbar**.
  - a. Explore the available commands.
  - b. Make sure to change your options from the **Choose commands from** section.
  - c. Reach out to your teacher if you need help to find these options.
  - d. Share your findings when prompted by the teacher.

## Try-it: Customize the Quick Access Toolbar



In this leveled try-it activity, you'll customize your **Quick Access Toolbar** in different ways.

### Try-it 1

In this try-it, you will move the **Quick Access Toolbar** to appear below the ribbon and add the **Open** and **New** commands to it.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Move the **Quick Access Toolbar** to appear below the ribbon.
3. Add the **Open** and **New** commands.
4. Remove the touch mode.

### Try-it 2

In this try-it, you will move the **Quick Access Toolbar** below the ribbon, add the **Open** and **New** commands to it, add the format painter from the **Home** tab of the ribbon to the **Quick Access Toolbar**, and reorder the commands so that the **format painter** command follows **Undo** and **Redo**.

### Resources

None

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Move the **Quick Access Toolbar** to appear below the ribbon.
3. Add the **Open** and **New** commands.
4. Add the **format painter** to your **Quick Access Toolbar** from the **Home** tab of the ribbon.
5. Reorder the commands so that the **format painter** command follows **Undo/Redo**.

## Try-it 3

In this try-it, you will move the **Quick Access Toolbar** below the ribbon and add your frequently used commands from your **Home** tab.

## Resources

None

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Move the **Quick Access Toolbar** to appear below the ribbon.
3. From your **Home** tab on your ribbon, add commands that you frequently use.
4. Explore additional commands in the **Backstage** view.
5. Add the tools that you would use the most to your **Quick Access Toolbar**.
6. Reorder the commands on your **Quick Access Toolbar**.

# Topic 2: Customize the ribbon tabs



What if you could organize all your favorite commands on a personalized ribbon? Think of how much faster it would be to have all your frequently used commands organized on one ribbon. The good news is that you can create, customize, and even view hidden ribbons. By default, not all tabs are displayed in Word or any other Office program. The **Developer** tab is one such tab. Tabs can be viewed or hidden by changing the ribbon tabs settings.

**What you can customize:** You can personalize your ribbon to arrange tabs and commands in the order you want them, hide or unhide your ribbon, and hide the commands that are used less often. Also, you can export or import a customized ribbon. The following screenshot depicts the options that appear in the ribbon.

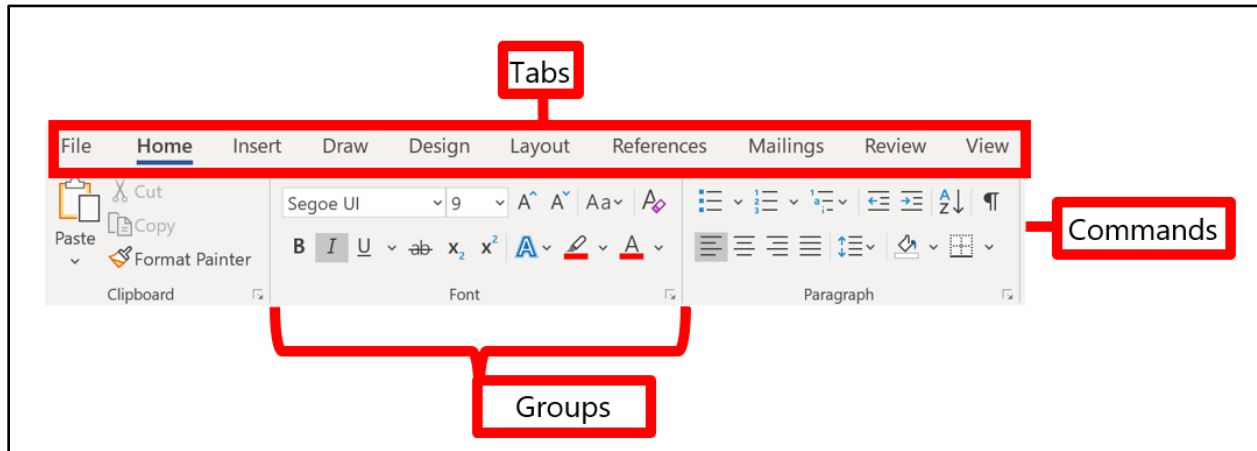


Figure 11: Ribbon

**What you can't customize:** You cannot reduce the size of your ribbon, the size of the text, or the icons on the ribbon. Also, you cannot change the placement of the **File** tab.

## Open the Customize the Ribbon window

1. Right-click or access the context menu on any empty space in the ribbon, as depicted in the following screenshot.

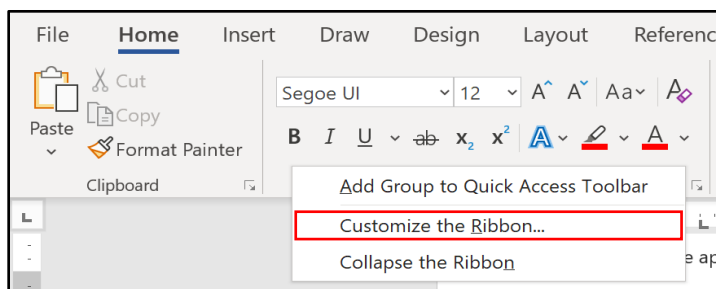


Figure 12: **Customize the Ribbon** option

2. Select **Customize the Ribbon**.

## Change the order of default or custom tabs

1. In the **Customize the Ribbon** window, under the **Customize the Ribbon** list, select the tab that you want to move, as depicted in the following screenshot.

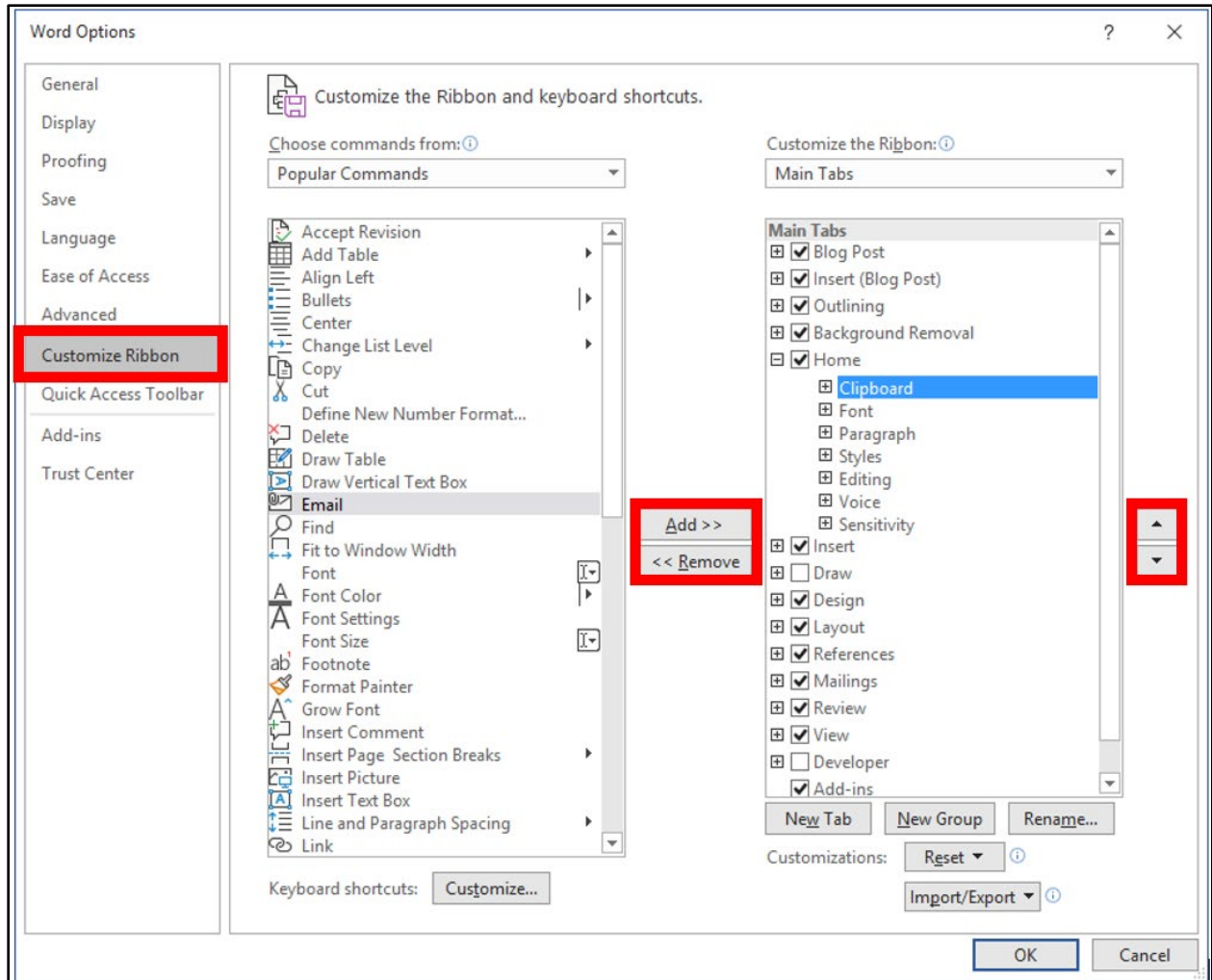


Figure 13: **Customize the Ribbon** window

2. Select the **Move Up** or **Move Down** arrow until you have the order you want.
3. Review and save your changes, and then select **OK**.

## Add a custom tab

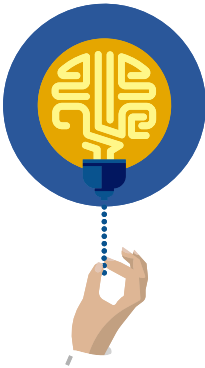
1. In the **Customize the Ribbon** window under the **Customize the Ribbon** list, select **New Tab**.
2. Review and save your changes, and then select **OK**.

## Rename a default or custom tab

1. In the **Customize the Ribbon** window under the **Customize the Ribbon** list, select the tab that you want to rename.
2. Select **Rename**, and then enter a new name.
3. Review and save your changes, and then select **OK**.

## Hide or unhide a tab

1. In the **Customize the Ribbon** window under the **Customize the Ribbon** list, uncheck or check the box next to the tab that you wish to hide or unhide.
2. Review and save your changes, and then select **OK**.



### Did you know?

When you customize your ribbon, the customizations only apply to the Office application you are working in at that time. For example, if you personalize your ribbon in Word, the changes won't be visible in Excel. If you want the customizations to be reflected in other Office applications, you will have to open each of those applications and make the same changes.



### Additional information

For more information on customizing the ribbon, go to: [Customize the ribbon in Office](#)

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## Activity: Think-pair-share

In this activity, you will think about how you customized your **Quick Access Toolbar** and how it relates to customizing your ribbons. Then share your thoughts with a classmate.

## Resources required

None

## Activity instructions

Participate in the activity by following these instructions:

1. Think about how you customized the **Quick Access Toolbar**. What steps did you take? What commands did you add? How did you rearrange your commands?
2. Draw a conclusion of how that would relate to customizing your ribbon.
3. Turn to a classmate and discuss your ideas.

## Try-it: Customize the ribbon tabs



In this leveled try-it activity, you'll unhide the **Developer** tab and customize other visible ribbon tabs.

### Try-it 1

In this try-it, you will customize your ribbon by adding the **Developer** tab to the ribbon.

### Resources

None

### Instructions

The following is the general task that you need to perform during this try-it:

- Add the **Developer** tab to the ribbon.

### Try-it 2

In this try-it, you will add the **Developer** tab to the ribbon and rearrange the **Home** tab so that the **Header & Footer** group appears right after the **Pages** group.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Customize your ribbon by adding the **Developer** tab.
3. Customize the **Home** tab so the **Header & Footer** group appears right after the **Pages** group.

## Try-it 3

In this try-it, you will add the **Developer** tab to the ribbon and create a new tab that contains at least three commands. Name the new tab with your name.

## Resources

None

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Customize your ribbon by adding the **Developer** tab.
3. Create a new tab that contains at least three commands.
4. Name the tab with your name.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. Choosing \_\_\_\_\_ from the **Customize Quick Access Toolbar** will open additional options in the **Backstage** view.

*Fill in the blank space.*

2. When customizing your ribbon, you cannot change the placement of the \_\_\_\_\_ tab.

*Fill in the blank space.*

3. You will need to add the \_\_\_\_\_ tab to your ribbon to access additional features in Word.

*Fill in the blank space.*

4. When customizing the **Quick Access Toolbar** or ribbon in the **Backstage** view, you must change your options under \_\_\_\_\_ to display additional commands.

*Fill in the blank space.*



# Lesson 3: Configuring the languages and using the language features

## Overview

In this lesson, you'll learn how to translate a document to another language and change the language options in your document. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts you learn.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. The \_\_\_\_\_ tab has the **Options**, then **Language** feature where you configure the language settings in Office programs.

*Fill in the blank space.*

2. Using Word language options, you can do which of the following?

*Select all that apply.*

- a. Translate words, phrases, or entire documents.
- b. Display your document in a different language.
- c. Change the keyboard layout to a different language.
- d. Automatically translate a document upon opening it.

3. You can add multiple proofing languages by going to \_\_\_\_\_ then \_\_\_\_\_ in the Backstage view.

*Fill in the blank spaces.*

# Topic 1: Configure the editing and display languages



You may want to receive and send documents in multiple languages. Additionally, to reach a larger audience you may want to use the built-in tools to translate your documents into another language. In such situations, you can use the Office language options to add a language or specify the language in which the Help and ScreenTips should display. This will allow you to use features in Word while working in another language.

## Set the Office language preferences

1. Select the **File** tab.
2. Select **Options**, then **Language**.
3. From here you have two options:
  - Office display language—Buttons, menus, and other controls
  - Office authoring and proofing—Manage languages used for creating and editing documents.

The following screenshot depicts the features within the **Set the Office Language Preferences** dialog box.

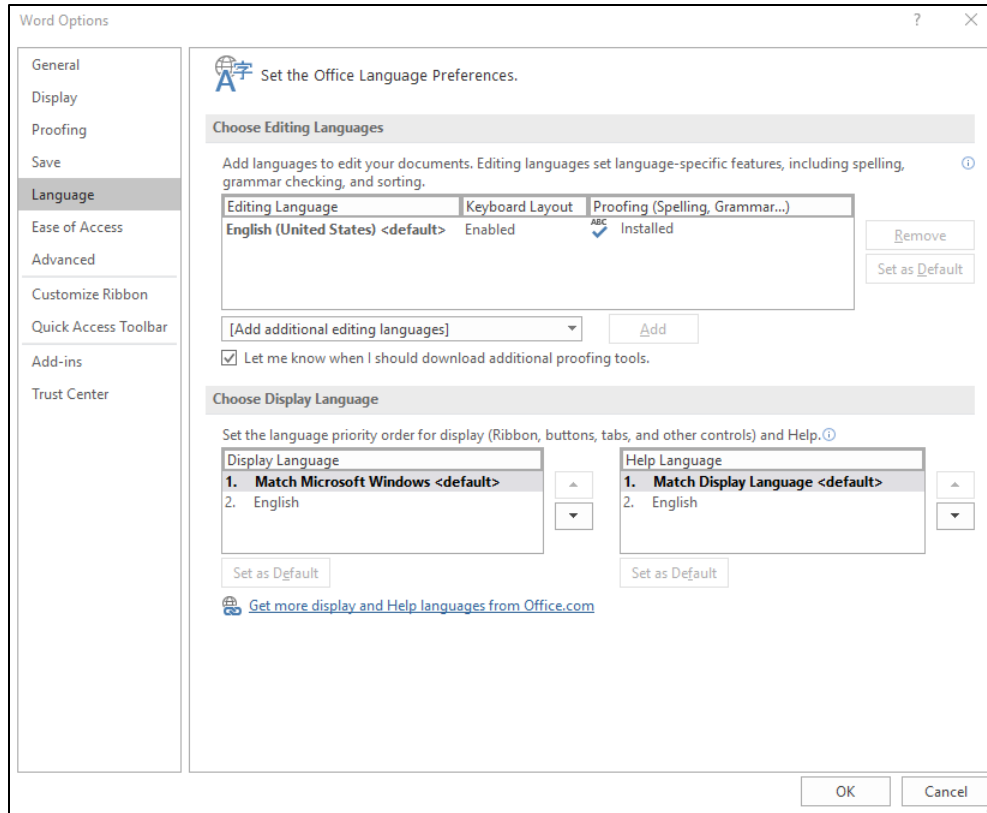
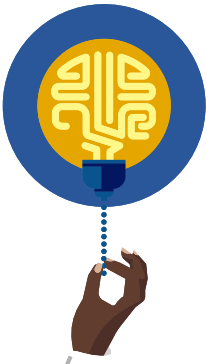


Figure 14: **Set the Office Language Preferences** dialog box



### Did you know?

The display and help languages can be set independently. For example, you could have buttons, menus, and other controls to match the language of your operating system. Or you could use a combination of languages for your operating system for editing, display, and Help.

## Add a language

You can add a language to the Office programs by adding an editing language. An editing language consists of a keyboard layout and proofing tools for that language.

1. Select the **File** tab.
2. Select **Options**, and then select **Language**.

- Under **Choose Editing Languages**, select the editing language that you want to add from the **Add additional editing languages** list, and then select **Add**, as depicted in the following screenshot.

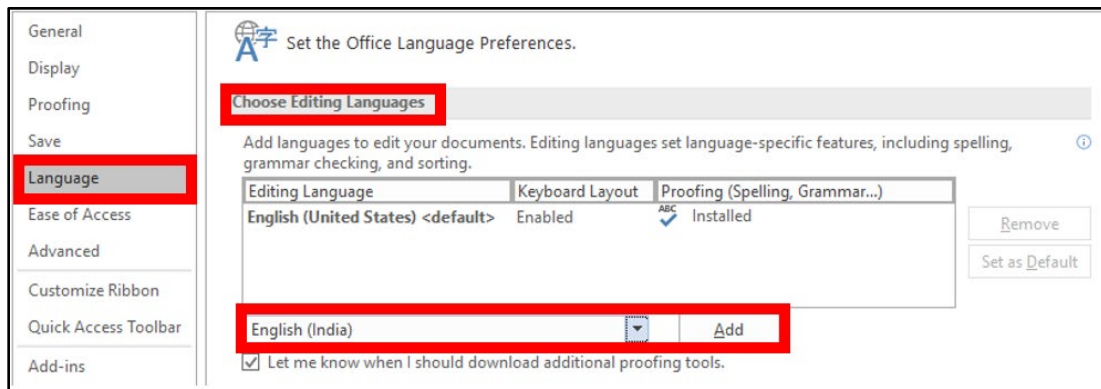


Figure 15: **Language** option

The added language appears in the list of editing languages.

If **Proofing not installed** appears, do the following:

- Select the **proofing not installed** link.
- Under **Step 1: Install the language accessory pack**, select your language in the list, and then select **Add**, as depicted in the following screenshot.

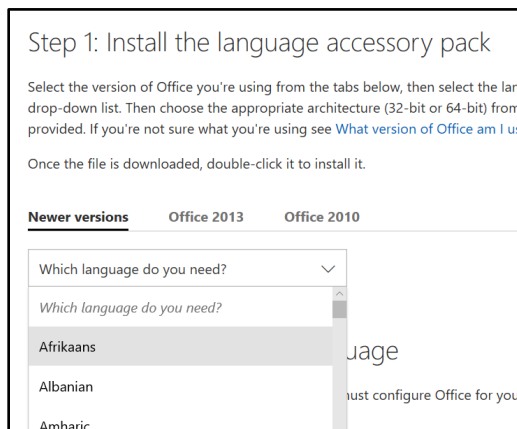


Figure 16: **Install the language accessory pack**



### Additional information

For more information on language preferences, go to: [Add an editing language or set language preferences in Office](#) and [Language Accessory Pack for Office](#).

## Activity: Show and tell

In this activity, follow as your teacher demonstrates how to add an additional editing and display language.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrate how to add an additional editing and display language.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Configure editing and display Languages



In this standalone try-it activity, you will configure the language settings in Word.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Add an additional editing language.

## Topic 2: Break the language barrier



You are working on your assignment with students who speak or use different languages. This could become a roadblock while sharing ideas for the assignment, so you need to look for tools available in Word to offer language translation.

To translate words or phrases into other languages, you need to perform the following steps:

1. In your document, select the text you want to translate.
2. Select **Review** tab, then **Translate**, and then **Translate Selection**.

3. Select your language to review the translation.
4. Select **Insert**.

The translated text will replace the text you selected in step 1, as depicted in the following screenshot.



Figure 17: Translated text



### Video

To review the video on language translation, go to: [Translate text into a different language](#)

---

## Activity: Pose a challenge

In this activity, follow as the teacher leads a discussion about why and how to translate phrases and documents.

### Resources required

None

### Activity instructions

Think about the new tools that you have learned to use in previous lessons. On a new blank document, enter at least two paragraphs about the new tools you learned in Word and how you would use them in the workplace. Then use this document to follow the demonstration on translating a document.

Participate in the activity by following these instructions:

1. Open a blank document.
2. Enter at least two paragraphs about the new tools you have learned about in Word and how you would use them in the workplace.
3. Open language settings.
4. Follow the demonstration to:
  - a. Translate a paragraph.
  - b. Translate an entire document.
  - c. Use spelling and grammar options for the set language.

## Try-it: Break the language barrier



In this leveled try-it activity, you will translate a document.

### Try-it 1

In this try-it, you will translate a document.

#### Resources

You will need the following resource for this try-it:

- Open **L3\_T2\_try1\_translate\_starter.docm** from this lesson's Learning Activity Resources.

#### Instructions

1. Translate the entire document to a different language.
2. Save and close the document.

### Try-it 2:

In this try-it, you will translate a paragraph into two different languages.

#### Resources

You will need the following resource for this try-it:

- Open **L3\_T2\_try2\_translate\_starter.docm** from this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Translate the entire document to a different language.
2. Copy the paragraph.
3. Paste it below the first paragraph.
4. Translate the selected text to another language.
5. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. You receive a document from a coworker that is in a different language. Which option should you use to complete your work?  
*Select the correct option.*
  - a. Enable display language.
  - b. Use the translator tool to translate each paragraph.
  - c. Enable editing language.
  - d. Use the translator tool to translate the entire document.
2. You could have everything match the language of your \_\_\_\_\_, or you could use a combination of languages for your operating system, editing, display, and **Help**.  
*Fill in the blank space.*
3. You can set the **Translator** \_\_\_\_\_ to **offer to translate content that isn't in a language that you read**.  
*Fill in the blank space.*



# Glossary

The following table defines the key terms used in the module.

<b>Collaborative</b>	Produced or conducted by two or more parties working together.
<b>Default</b>	Pre-existing value of a user-configurable setting that is assigned to a software application, computer program, or device; the norm.
<b>Embedded</b>	Independent but part of a bigger whole.
<b>Macro</b>	A single instruction that expands automatically into a set of instructions to perform a task; a recording of steps.
<b>Media</b>	Any written or communicated item used to promote someone or something—posters, letters, flyers, videos, websites, etc.
<b>More Command</b>	A down-arrow button used to show more options.
<b>Normal Template</b>	The default group of settings for a document.
<b>Proficiency</b>	A high degree of competence or skill; expertise.
<b>Quick Access Toolbar</b>	A toolbar that holds the most-used functions, such as save, undo/redo, and print. This toolbar is customizable.
<b>Shortcut</b>	An icon that represents a set command or program link. When selected, it activates the program linked to it.
<b>Translate</b>	To change from one language to another.
<b>Trust Center</b>	Where you can find security and privacy settings for Microsoft Office programs.

*Table 2: Glossary terms and definitions*

# Cornerstone

## Overview

In this cornerstone, you will enable macros in your documents to configure the Quick Access Toolbar and ribbons. You will also set up the language editing and display options.

## Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

Enable macros in an existing document	<ul style="list-style-type: none"><li>• 1.1.5: Enable macros in a document</li></ul>
Customize the Quick Access Toolbar	<ul style="list-style-type: none"><li>• 1.1.6: Customize the Quick Access Toolbar</li></ul>
Display hidden ribbon tabs	<ul style="list-style-type: none"><li>• 1.1.7: Display hidden ribbon tabs</li></ul>
Change the Normal template default font	<ul style="list-style-type: none"><li>• 1.1.8: Change the Normal template default font</li></ul>
Configure editing and display languages	<ul style="list-style-type: none"><li>• 1.3.1: Configure editing and display languages</li></ul>
Use language-specific features	<ul style="list-style-type: none"><li>• 1.3.2: Use language-specific features</li></ul>

Table 3: Cornerstone objectives

# Duration

50 minutes

## Instructions

1. Complete the tasks for each file.
2. When saving your file, add your name to the end of the filename; for example, "Background\_Espino". Follow your teacher's directions for where to save your files.
3. When you're done with the Cornerstone, assess your completion and enter the points you think you earned within the task lists below. You can ask your teacher for help if you need it.

## Tasks

In this Cornerstone, you will work with two files; each has 10 tasks (a total of 20 tasks). Save each file separately, and then move on to the next.

### File 1: Cornerstone\_background\_starter.docm

#### Task: Enable macros in a document (3 points)

1. Open the document. (0 points)
2. Enable the macros. (3 points) (Exam objective 1.1.5)

Points scored: \_\_\_\_\_ / 3

#### Task: Change the Normal template default font (6 points)

1. Change font to **Arial, 14 pt., Black, Text 1**, and **Lighter 50%**. (3 points) (Exam objective 1.1.8)
2. Apply the new default font. (3 points) (Exam objective 1.1.8)

Points scored: \_\_\_\_\_ / 6

#### Task: Configure the editing and display languages (3 points)

1. Below your paragraph, enter a one-line social media message. (1 point) (N/A)
2. Add two different editing languages. (2 points) (Exam objective 1.3.1) Points

scored: \_\_\_\_\_ / 3

### Task: Use language features (4 points)

1. Copy and paste your social media message and add a title for your first language (for example, "English"). (1 point) (Exam objective N/A)
2. Translate the message to another language. (1 point) (Exam objective 1.3.2)
3. Copy and paste your social media message that you just translated and add the title for your second language. (1 point) (Exam objective N/A)
4. Translate the message to a second language. (1 point) (Exam objective 1.3.2) Points scored: \_\_\_\_\_ / 4

### Task: Enable all macros (1 point)

- Enable all macros in the Trust Center. (1 point) (Exam objective 1.1.5)

Points scored: \_\_\_\_\_ / 1

### Task: Customize the Quick Access Toolbar (3 points)

1. Add **Save-as**. (1 point) (Exam objective 1.1.6)
2. Reposition **Save-as** to the first option on your **Quick Access Toolbar**. (1 point) (Exam objective 1.1.6)
3. Move your **Quick Access Toolbar** to the bottom of your ribbon. (1 point) (Exam objective 1.1.6)

Points scored: \_\_\_\_\_ / 3

### Task: Disable macros (1 point)

- Disable all macros with notification. (1 point) (Exam objective 1.1.5)

Points scored: \_\_\_\_\_ / 1

### Task: Customize the ribbon tabs (4 points)

1. Add a new ribbon tab with two new groups. (1 point) (Exam objective 1.1.7)
2. Rename your ribbon tab. (1 point) (Exam objective 1.1.7)
3. Rename your groups. (1 point) (Exam objective 1.1.7)
4. Add three commands to each group. (1 point) (Exam objective 1.1.7)

Points scored: \_\_\_\_\_ / 4

### Task: Configure the editing and display languages (1 point)

- Remove the proofing languages you added previously. (1 point) (Exam objective 1.3.1)

Points scored: \_\_\_\_\_ / 1

### Task: Modify your Normal template font (1 point)

- Add a **Word only underline, Blue, Accent 5, Darker 25** percent to your default font. (1 point) (Exam objective 1.1.8)

Points scored: \_\_\_\_\_ / 1

FILE 1 TOTAL POINTS: \_\_\_\_\_ /27

## File 2: Cornerstone\_Munson\_ft\_starter.docm

### Task: Open the document and enable the macros (1 point)

1. Open the file. (0 points) (Exam objective N/A)
2. Enable the macros. (1 point) (Exam objective 1.1.5)

Points scored: \_\_\_\_\_ / 1

### Task: Change the Normal template font (2 points)

1. Change the default font to **Comic Sans, 18 point, Green, Accent 6, Darker 25%**. (2 points) (Exam objective 1.1.8)
2. Apply it to the first line of text. (1 point) (Exam objective 1.1.8)

Points scored: \_\_\_\_\_ / 2

### Task: Customize the ribbon tabs (1 point)

- Delete your new ribbon tab that you created in the previous project. (1 point) (Exam objective 1.1.7)

Points scored: \_\_\_\_\_ / 1

### Task: Customize the Quick Access Toolbar (1 point)

- From the **Layout** tab, add the **Selection Pane** to the **Quick Access Toolbar**. (1 point) (Exam objective 1.1.6)

Points scored: \_\_\_\_\_ / 1

### Task: Use language features (1 point)

- Translate the first paragraph to another language. (1 point) (Exam objective 1.3.2)

Points scored: \_\_\_\_\_ / 1

### Task: Use language features (1 point)

- Add a language to the translator preferences. (1 point) (Exam objective 1.3.2)

Points scored: \_\_\_\_\_ / 1

### Task: Document properties (1 point)

- Add **Munson** to the document properties as a keyword. (1 point) (Exam objective N/A)

Points scored: \_\_\_\_\_ / 1

### Task: Customize the Quick Access Toolbar (2 points)

1. Reposition the **Selection Pane** on the **Quick Access Toolbar**. (1 point) (Exam objective 1.1.6)
2. Move your **Quick Access Toolbar** to the top of your ribbon. (1 point) (Exam objective 1.1.6)

Points scored: \_\_\_\_\_ / 2

### Task: Enable macros (1 point)

- Disable all macros with notification. (1 point) (Exam objective 1.1.5)

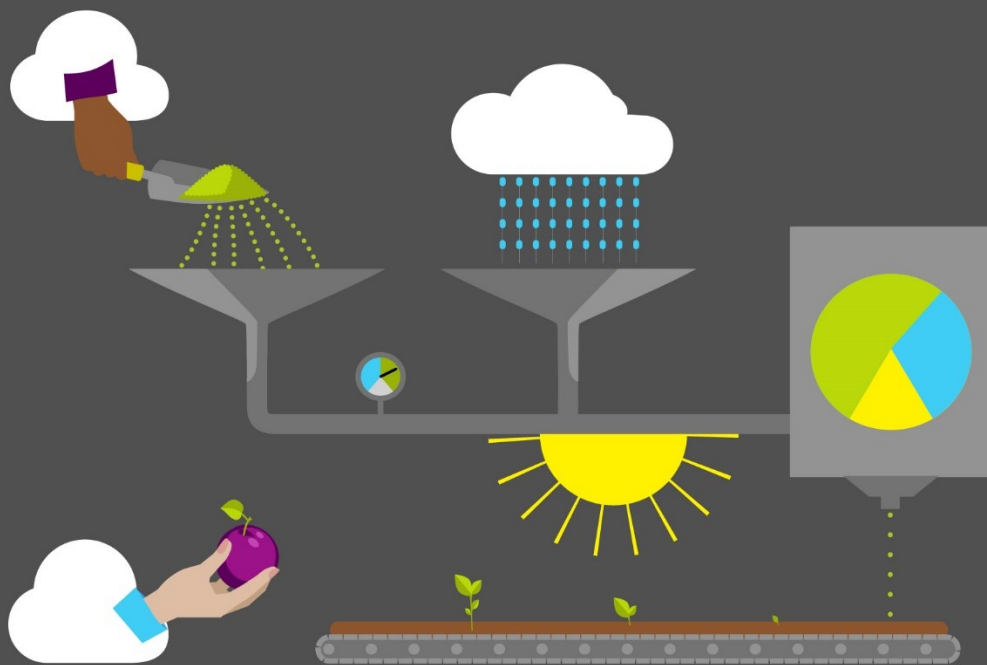
Points scored: \_\_\_\_\_ / 1

### Task: Customize the ribbon tabs (1 point)

- Display the **Developer** tab. (1 point) (Exam objective 1.1.7)

Points scored: \_\_\_\_\_ / 1

FILE 2 TOTAL POINTS: \_\_\_\_\_ /12



# Student Guide

40570A

Microsoft Word expert 2019

Module 2: Modifying and creating document styles and templates

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# Module overview

## Description

As you learned in course 40566A, *Microsoft Word associate*, you can edit a document with other users and make it user-friendly, concise, and readable by tracking individual edits. This module provides more detail about how to merge those documents into one and control the document version along the way. You'll learn how to save time by defining styles and creating templates to ensure consistent formatting between multiple documents.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Working with styles	<ul style="list-style-type: none"> <li>• Create paragraph and character styles</li> <li>• Modify existing styles</li> <li>• Copy styles to other documents or templates</li> </ul>	<ul style="list-style-type: none"> <li>• 2.3.1</li> <li>• 2.3.2</li> <li>• 2.3.3</li> </ul>
Modifying templates and managing versions	<ul style="list-style-type: none"> <li>• Modify existing document templates</li> <li>• Manage document versions</li> </ul>	<ul style="list-style-type: none"> <li>• 1.1.1</li> <li>• 1.1.2</li> </ul>
Comparing and combining documents, and AutoRecover options	<ul style="list-style-type: none"> <li>• Compare and combine multiple documents</li> <li>• Manage AutoRecover options</li> </ul>	<ul style="list-style-type: none"> <li>• 1.1.3</li> </ul>
Cornerstone: Comparing and combining two versions of a Microsoft Word document	<ul style="list-style-type: none"> <li>• Compare and combine multiple documents formatted with custom styles and templates</li> </ul>	<ul style="list-style-type: none"> <li>• 1.1.1</li> <li>• 1.1.2</li> <li>• 1.1.3</li> <li>• 1.1.8</li> <li>• 2.3.1</li> <li>• 2.3.2</li> <li>• 2.3.3</li> </ul>

Table 1: Objectives by lesson

# Scenario

During this module, you'll learn how to create custom themes and work collaboratively with others on documents. In this scenario, you'll put those learned skills into practice to create the final version of the Munson's Company Overview document. as the expansion of the Munson's Pickles and Preserves Farm's CSA Program. The document must conform to the current styles and branding used by the company.

You'll work on documents drafted by your team, compare changes made in each version for future reference, create a final document based on the comments and changes suggested, and present to the team for a final review.

# Cornerstone

This module concludes with a cornerstone, in which you'll set your styles to Munson's specifications and create a template for use in future documents. After you set the formatting styles for the documents, you'll compare and combine two documents submitted to you by coworkers and finalize the document. In the cornerstone, you'll:

- Modify existing document templates
- Manage document versions
- Compare and combine multiple documents
- Change the **Normal** template default font
- Create paragraph and character styles
- Modify existing styles
- Copy styles to other documents or templates
- Enable Macros

# Lesson 1: Working with styles

## Overview

In this lesson, you'll learn how to modify the existing styles available in the Word **Styles** gallery. You'll also learn how to create new paragraph and character styles, and copy styles in documents and templates. You'll participate in discussions and step-by-step demonstrations, and you'll have opportunities to put to practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Word offers built-in, \_\_\_\_\_ styles that help you to automatically create a table of contents in your documents.

*Fill in the blank.*

2. There are two types of styles in Word, \_\_\_\_\_ and \_\_\_\_\_.

*Select the correct options.*

- a. **Page**
- b. **Character**
- c. **Document**
- d. **Paragraph**

3. You can copy \_\_\_\_\_ and \_\_\_\_\_ from one document to another.

*Select the correct options.*

- a. Macros
- b. Styles
- c. Properties
- d. Fonts

4. The \_\_\_\_\_ organizes styles in Word and allows you to create new styles.

*Fill in the blank.*

# Topic 1: Customize existing styles



As you begin to work with more advanced documents in Word—such as business documents and reports—you can use styles to quickly apply a set of formatting choices consistently throughout your document. If you don't like some the styling features already available in Word, you can easily change the existing styles to your preferred formatting. You've already practiced changing the default font in the previous module. In this topic, you'll build on that knowledge to customize existing styles, and then add your preferred formatting with one step.

## Customize a style by updating it to match the formatting in your document

To change the formatting style of the text in your document and apply it to the styles in the Styles gallery, you need to perform the following steps:

1. Select the text in your document that has the style applied, such as **Heading 1**. When you select the text that has a style applied, that style is highlighted in the **Styles** gallery.
2. Format the selected text with the new attributes that you want. For example, you might want to change the font size for the **Heading 1** style from 16 to 14 point.
3. Right-click or access the context menu on the style that you want to change, and then select **Update [Style Name] to Match Selection**. The following screenshot depicts options within the **Styles** gallery.

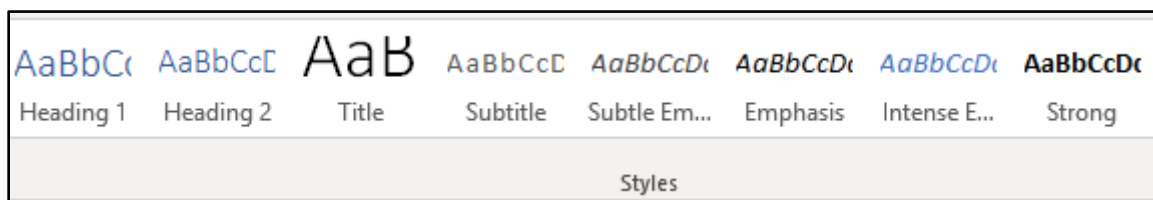


Figure 1: **Styles** gallery

## Modify a style manually in the Modify Style dialog box

To modify a style in the **Styles** gallery without using the text in your document, you need to perform the following steps:

1. On the **Home** tab, right-click or access the context menu on any style in the **Styles** gallery, and then select **Modify**. The following screenshot depicts the **Modify** sub-menu options.

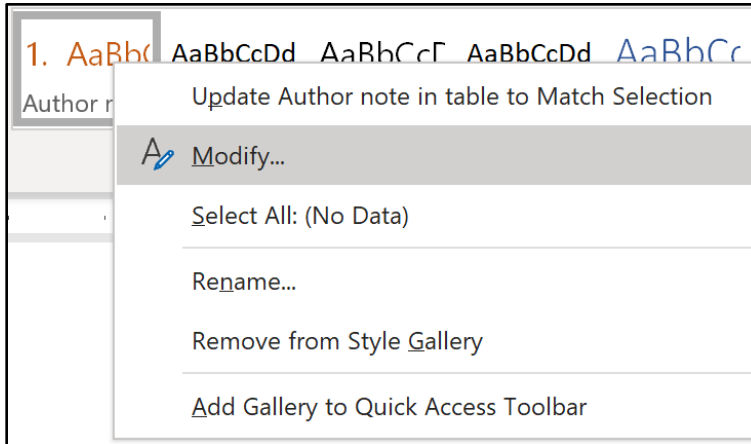


Figure 2: **Modify** sub-menu options

2. In the **Modify Style** dialog box, in the **Formatting** section, make the formatting changes you want, such as font style, size, color, alignment, line spacing, or indentation. The following screenshot depicts the features within the **Modify Style** dialog box.

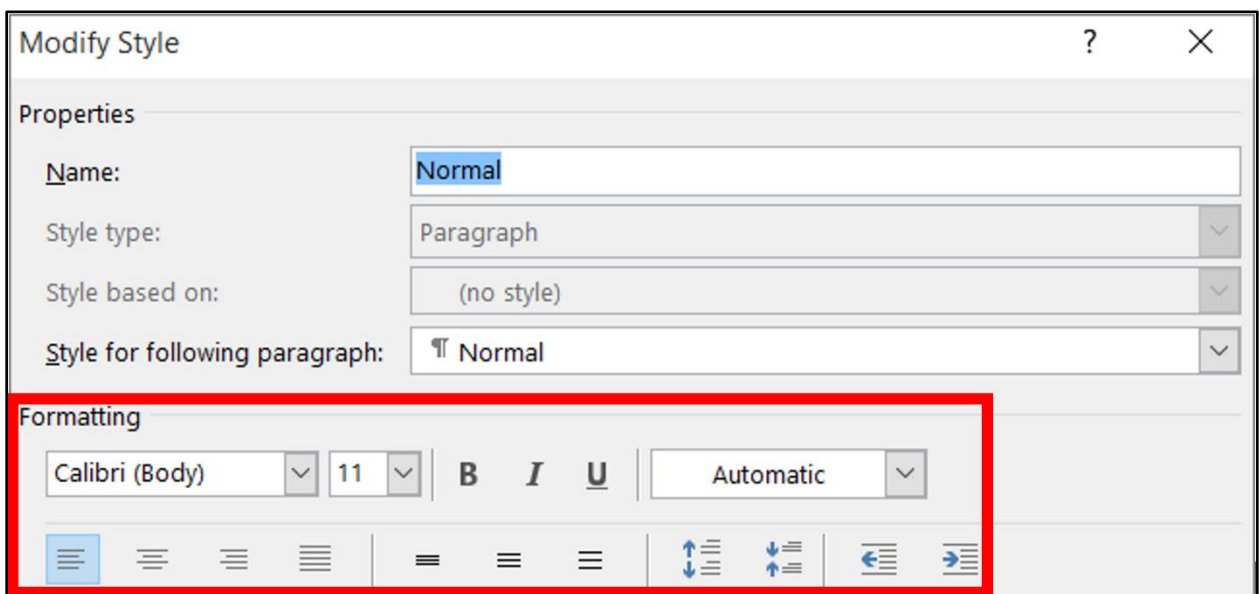


Figure 3: **Modify Style** dialog box

3. Select the **Add to the Styles gallery** check box, and then select the radio button for whether you want the style changes to apply to only this document, or to new documents based on this template. The following screenshot depicts the features in the **Add to the Styles** gallery option.

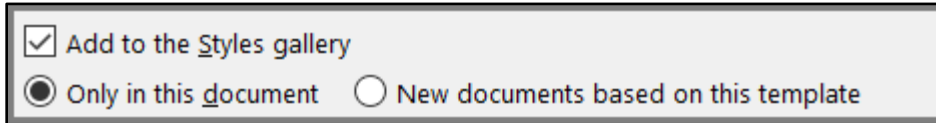
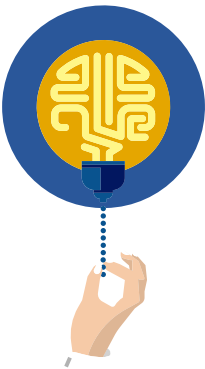


Figure 4: **Add to the Styles** gallery



#### Did you know?

The difference between paragraph and character styles is that you must apply paragraph styles to an entire paragraph, whereas you can apply character styles to a single letter or word, to several words, or to a whole paragraph.



#### Additional information

For more information on creating new styles, go to: [Customize or create new styles](#)



#### Video

To review the video on applying styles, go to: [Apply styles](#)

---

## Activity: Pose a challenge

In this activity, follow the teacher-led discussion about why you would modify a built-in style. Then, research how to modify a built-in style and observe the demonstration.

### Resources required

None

## Activity instructions

Participate in the activity by following these instructions:

1. Ask the teacher clarifying questions.
2. Participate in the discussion.
3. Use the **Help** options to locate the procedures to modify a built-in style.
4. Observe or lead the student demonstration on modifying a built-in style.

## Try-it: Customize existing styles



In this leveled try-it activity, you'll practice modifying existing styles and applying them to the text in your document.

### Try-it 1

In this try-it, you'll modify the **Heading 1** style.

### Resources

You'll need the following resource for this activity:

- Open **L1\_T1\_try1\_pickle\_people\_starter.docx** in this lesson's **Learning Activity Resources** folder.

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Modify the **Heading 1** style to the font, color, and size of your choice.
2. Save and close the document.

### Try-it 2

In this try-it, you'll modify the **Heading 1** style, **Heading 2** style, and the **Strong character** style.

### Resources

You'll need the following resource for this activity:

- Open **L1\_T1\_try2\_pickle\_people\_starter.docx** in this lesson's **Learning Activity Resources** folder.



## Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Modify the following styles to the font, color, and size of your choice.
  - a. **Heading 1** style
  - b. **Heading 2** style
  - c. **Strong character** style
2. Save and close the document.

## Topic 2: Create new paragraph and character styles



In the previous topic, you learned how to save time formatting text by creating styles and modifying existing styles. It's just as simple to create additional styles. You can create new paragraph styles when you want to apply formatting to an entire paragraph, and character styles when you want to apply formatting to a single character.

To create a new style based on your document formatting, you need to perform the following steps:

1. Select the text on which you want to base a new style.
2. From the menu, select **Styles**, and then select **Create a Style**. The following screenshot depicts the options that appear when you select this option.

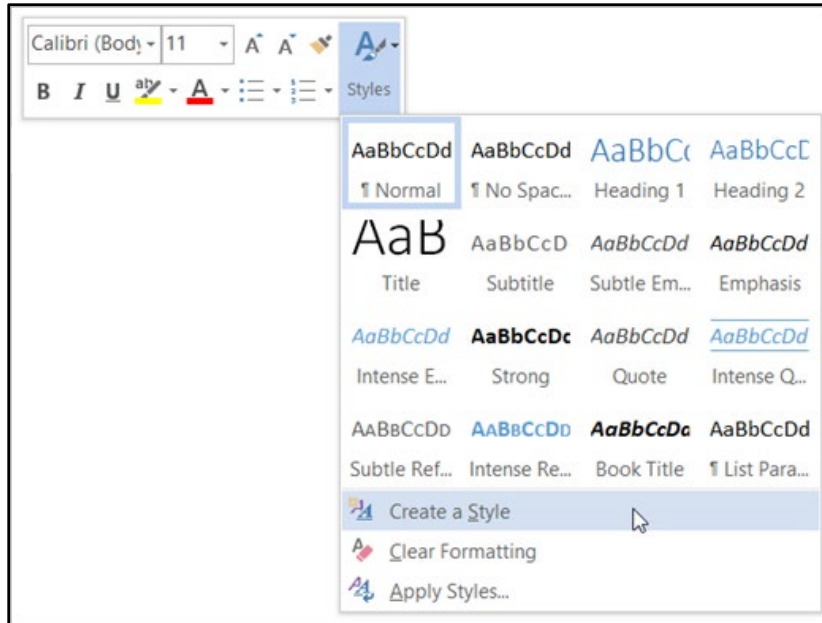
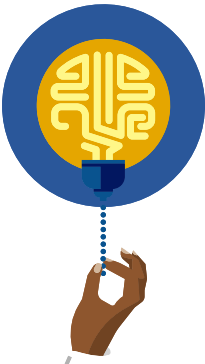


Figure 5: Create a style

3. In the **Create New Style from Formatting** dialog box, provide a name for your style, and then select **OK**. Your new style will be in the **Styles** gallery.



#### Did you know?

If you want your new style to be available in all new Word documents, right-click or access the context menu on the new style in the **Styles** gallery, select **Modify**, and then at the bottom of the **Modify Style** dialog box select **New documents based on this template**.



#### Additional information

For more information on customizing styles, go to: [Customize or create new styles](#)

## Activity: One step back, two steps forward

In this activity, you'll think about what you've just learned about modifying existing styles and how that knowledge will help you create your own style.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Open a blank document and list two things that you learned about modifying an existing style, which you think will help you when creating a new style.
2. Share your ideas with the class.
3. Explore the **Styles** gallery and discover how you can create your own style.
4. Explain the steps to the class.
5. Save and close the document.

## Try-it: Create new paragraph and character styles



In this leveled try-it activity, you'll practice formatting text in your document to create new character and paragraph styles, and then apply these styles to the text in your document.

### Try-it 1

In this try-it, you'll create a new character style.

### Resources

You'll need the following resource for this try-it:

- Open **L1\_T2\_try1\_farmers\_market\_starter.docx** in this lesson's **Learning Activity Resources** folder.

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Format the word **Munson's**.
2. After you've formatted it to your liking, save the character style to your **Style** gallery as **Munson heading**.

3. Use this style to format the rest of the company name, **Pickles and Preserves Farm**.
4. Save and close the document.

## Try-it 2

In this try-it, you'll create a new character and paragraph style.

### Resources

You'll need the following resource for this try-it:

- Open **L1\_T2\_try2\_farmers\_market\_starter.docx** in this lesson's **Learning Activity Resources** folder.

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Format the word **Munson's**.
2. After you've formatted it to your liking, save the character style to your **Style** gallery as **Munson heading**.
3. Use this style to format the rest of the company name, **Pickles and Preserves Farm**.
4. Format the paragraph beginning with **Try our new** to your liking, and then save the paragraph style to your **Style** gallery as **Munson** paragraph.
5. In the text box after **See you Saturday and Sunday at the Towne Center Farmers Market**, type a short paragraph about the new preserves that Munson's will be showcasing at the farm show.
6. Use the new **Munson** paragraph style to format the second paragraph.
7. Save and close the document.

## Topic 3: Copy styles to other documents



Now that you've modified and created styles, you can use them in all documents. You can easily copy styles from one document to another. Just think about how helpful this would be for businesses wanting a consistent appearance for their documents. To save time and remain consistent you can copy styles between any documents, including reports and business letters that are used at an office.

To import and export styles using the **Manage Styles** dialog box, you need to perform the following steps:

1. On the **Home** tab, in the **Styles** group, select the dialog box launcher. The following screenshot depicts the options that display when you select this option.

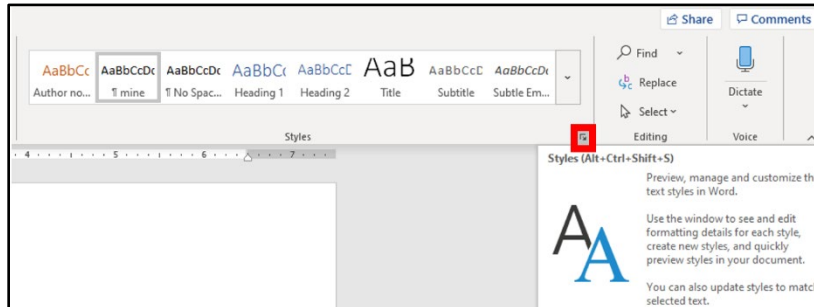


Figure 6: **Styles** group

2. In the **Styles** dialog box, select **Manage Styles**. The following screenshot depicts some of the available styles within the **Styles** dialog box:

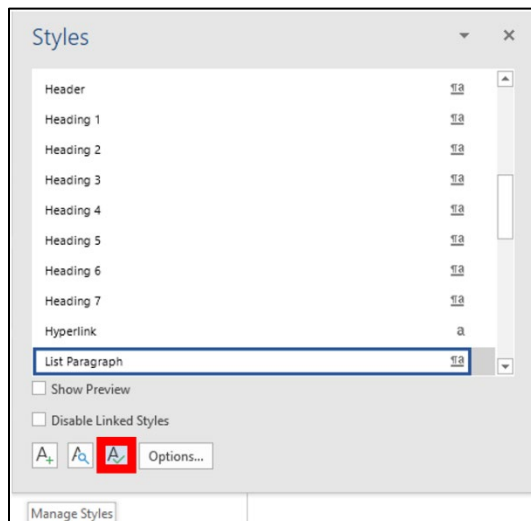


Figure 7: **Styles** dialog box

3. In the **Manage Styles** dialog box, select **Import/Export**, as depicted in the following screenshot.

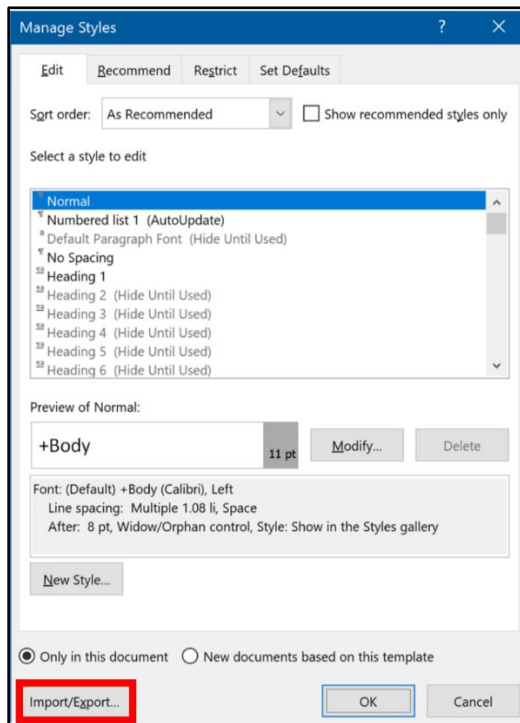


Figure 8: **Manage Styles** dialog box

4. In the **Organizer** dialog box:
  - From the first **Styles available in** drop-down list, select the first document.

**Note:** If you don't find the document that you want to use, select **Close File**, and then navigate to the location of your saved file.

## Modifying and creating document styles and templates

From the second **Styles available in** drop-down list, select the second document. The following screenshot depicts the features within the **Organizer** dialog box.

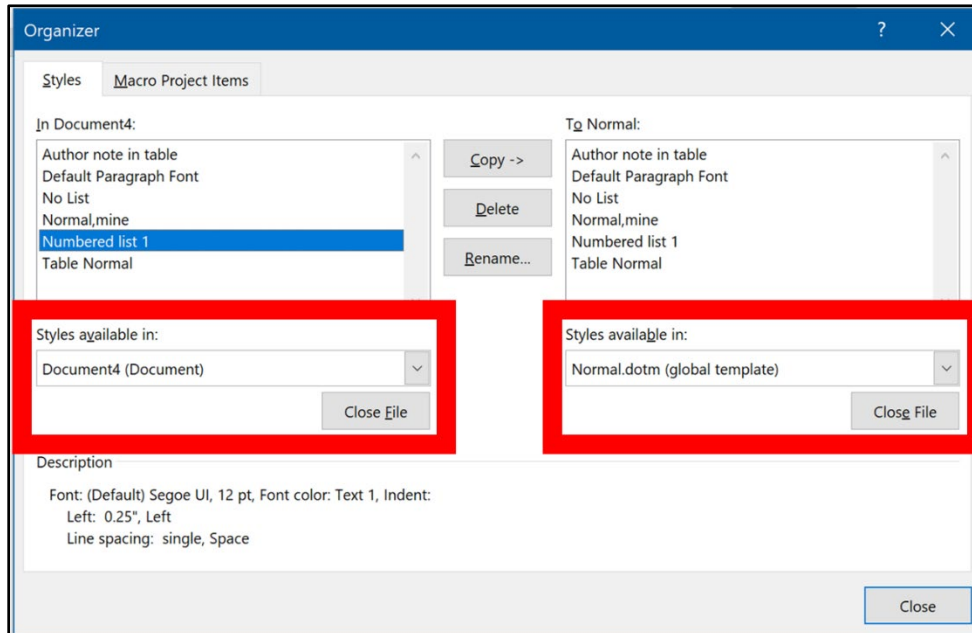


Figure 9: **Organizer** dialog box

5. Select the style, and then select **Copy**.

**Note:** It actually doesn't matter which document you select first and which is second. You can copy to and from each open document using the **Copy** button, which has reversible arrows. The following screenshot depicts the **Copy** style feature with both directional arrows, within the **Organizer** dialog box.

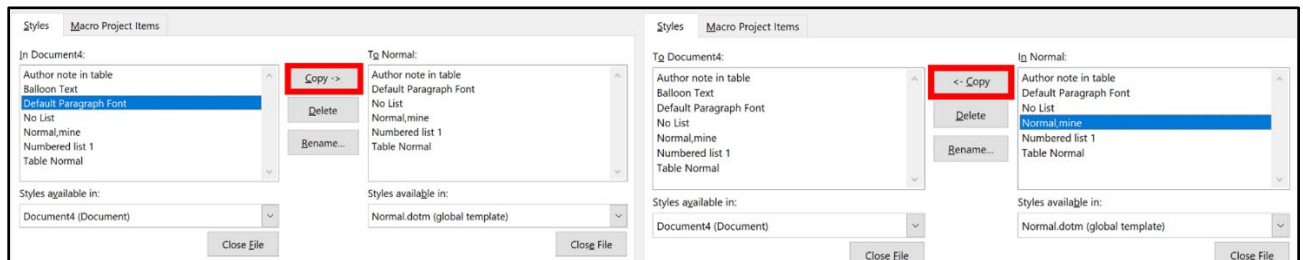
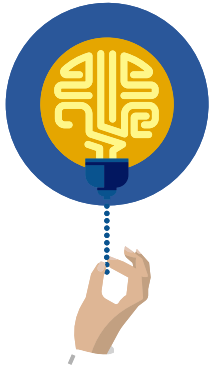


Figure 10: **Copy** style to another document



### Did you know?

You can access the **Organizer** dialog box by selecting the **Document Template** in the **Templates** group on the **Developer** tab.

---

## Activity: Discuss and learn

In this activity, you'll participate in a teacher-led group discussion on the reasons to copy styles from one document to another and to the **Normal** template. After the discussion, the teacher will demonstrate how to copy the custom styles to other documents and the **Normal** template.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Discuss why a user might want to copy a custom style to another document.
2. Discuss why a user might want to copy a custom style to the **Normal** template.
3. Participate in the discussion.
4. Ask the teacher clarifying questions.
5. Observe the teacher demonstrate how to copy styles.

## Try-it: Copy Styles to other documents



In this standalone try-it activity, you'll copy your styles from a previous document that you created, to the **Normal** template.

### Resources

You'll need the following resource for this try-it:

- Open **L1\_T3\_try\_newsletter\_starter.docx** in this lesson's **Learning Activity Resources** folder.



## Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Add the **my bullets** style to the **Normal** template.
2. Open a new document based on the **Normal** template.
3. Enter a multilevel list by using the new **my bullets** style.
  - **Level 1 – Pickles**
  - **Level 2** – List three items for new preserves flavor ideas.
  - **Level 1 – Preserves**
  - **Level 2** – List three items for new preserves flavor ideas.
4. Don't overthink the list items. They could be fun or serious, and not related to Munson's at all. Make sure that the **my bullets** list style is working.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. You've been working on a new quarterly report design and loved the style that you created for your first paragraph. You would like to use the style in other documents as well. What should you do?

*Select the correct option.*

- a. Modify the style manually in the **Modify Styles** dialog box.
  - b. Copy and paste the paragraph and enter the new text.
  - c. Select the paragraph and then create a new style based on the formatted text.
  - d. Use the **Format painter** to copy the style throughout the document.
2. What's the correct sequence of steps to create a new style based on document formatting?

*Indicate the correct sequence by adding numbers 1-3 next to the following items:*

- a. From the menu, select **Styles**, and then select **Create a Style**.

\_\_\_\_\_

- b. In the **Formatting** dialog box, provide your style a name, and then select **OK**.

\_\_\_\_\_

- c. Select the text on which you want to base a new style. \_\_\_\_\_

3. In the **Create new style from formatting** dialog box, you have additional formatting options that you can use when you're creating or modifying a style. What are these options?

*Select all that apply.*

- a. **Font**
  - b. **Language**
  - c. **Text effects**
  - d. **Shortcut key**
  - e. **Tabs**
  - f. **Frame**
4. To copy a style from one document to another, go to **Styles**, and then select \_\_\_\_\_.

*Fill in the blanks.*

# Lesson 2: Modifying templates and managing versions

## Overview

In this lesson you'll learn how to modify templates, and practice managing versions of a document. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts you learn.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. A \_\_\_\_\_ is a document with pre-assigned styles, fonts, macros, and potentially text that can be reused and edited.

*Fill in the blank.*

2. You can search templates by going to the \_\_\_\_\_ tab and then selecting \_\_\_\_\_.

*Fill in the blanks.*

3. To use version control, you must save your documents to \_\_\_\_\_ or \_\_\_\_\_.

*Fill in the blanks.*

## Topic 1: Modify existing document templates



Have you ever needed to create a report, resume, calendar, or brochure? Word has a large variety of prebuilt templates available to save you time and help with the creative process. The best part is you can modify the templates to fit your requirements, and then save them for future use.

To modify built-in templates, you need to perform the following steps:

1. In a blank document, select **File**, and then select **New**.
2. Search for a template by:
  - Entering a keyword in the **Search** box.
  - Selecting a suggested search topic.
  - Selecting a built-in template icon.
- The following screenshot depicts the options that display when you search for templates.

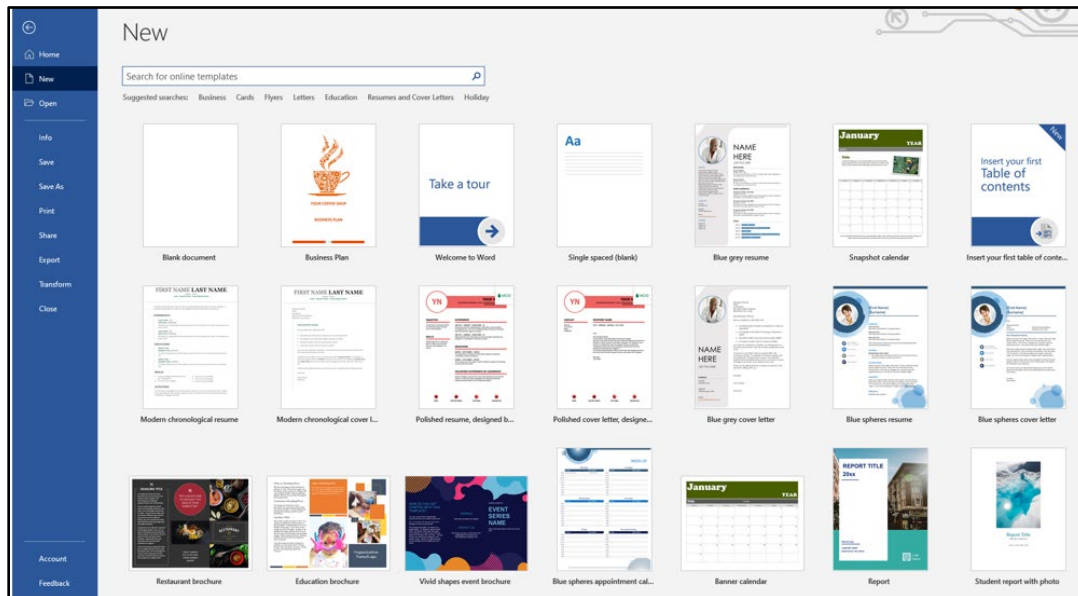


Figure 11: Template search option

3. Make the changes you want, and then save the document as a Word template using the .dotx format.
4. Close the template.

When you save a template, the default location is **Custom Templates** in the **Documents** folder on the local machine.

**Note:** If you don't save your templates in the **Custom Templates** folder on the local computer, they won't be available for use when you search for them using the **Open** feature in Word. Instead, you'll have to navigate to them manually.



### Additional information

For more information on modifying Word templates, go to: [Edit templates](#)



### Video

To review the video on using templates, go to: [Create a file from a template](#)

---

## Activity: Pose a challenge

In this teacher-led discussion you'll explain how templates are time-saving tools, and how to quickly create documents using templates. Then you'll participate in a step-by-step demonstration on how to create a new document from a template, modify the document, and then save it as a new template.

### Resources required

None

### Activity instructions

- Observe the teacher as they demonstrate how to create a new document from a template, modify the new document, and then save it as a custom template.
- Ask the teacher clarifying questions.
- Participate in the discussion.
- Open a new document based on the template of your choice.
- Make formatting changes to the document.
- Save the document as a Word template.

## Try-it: Modify existing document templates



In this standalone try-it activity, you'll modify an existing template, and save it as a customized template. You'll then create a new document based on the customized template.

### Resources

None

## Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Open an existing **Flyer** template of your choice.
2. Make changes in the template to include the text **Munson's Pickles and Preserves Farm**.
3. Change fonts, colors, and pictures based on your preference.
4. Keep the text placeholder empty so that you can quickly add text for future events.
5. Save the document as a template.
6. Create a new document based on this template.
7. Fill in the details in the document about the release of new preserve flavors at an event this weekend.
8. Save and close the document.

## Topic 2: Manage previous document versions



While working in conjunction with others on the same file you might find that changes they've made either need adjustments, or are incorrect—such as important information that was deleted. Or perhaps you worked on an existing file and forgot to save the new version with a new file name. In any case, to retrieve old versions of the document, you'll need to save it to Microsoft OneDrive or Microsoft SharePoint.

To review version history in Word for files that are stored in OneDrive or SharePoint Online, you need to perform the following steps:

1. Open the file.
2. Select **File**, select **Info**, and then select **Version history**.
3. In the **Version history** pane, select a version to open, and then open it in a separate window.

A **Previous Version** bar displays at the top of the file, from where you can compare or restore document version. The following screenshot depicts the **Compare/Restore** options that display when you select this option.

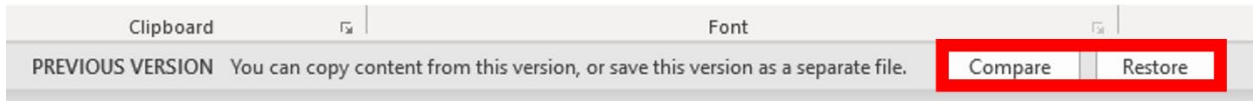
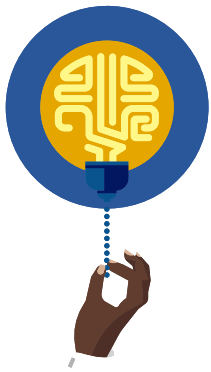


Figure 12: **Compare and Restore** options

4. Select **Restore**, and then from the **Task** pane select the document version you want to restore.



### Did you know?

If you work in a SharePoint environment, you have some powerful versioning tools at your fingertips. SharePoint libraries offer version tracking, sharing, and recycle bin storage when you delete something. Rarely is something really lost!



### Additional information

For more information on versioning Office files, go to: [View previous versions of Office files](#)

---

## Activity: Discuss and learn

In this activity, you'll participate in a teacher-led group discussion on how and when you could use version history. Then explore the Backstage view to review version history options.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Ask the teacher clarifying questions.
2. Participate in the discussion.

3. Observe the teacher as they demonstrate how to access document history for both SharePoint and OneDrive files.
4. Open any document that you've previously saved in OneDrive or SharePoint.
5. Go to the Backstage view, select **Info**, and then select **Version History**.
6. Explore the available options.

## Try-it: Manage previous document versions



In this standalone try-it activity you'll review the document versioning and restore options.

### Resources

None

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Open your OneDrive and create a new Word document. Open the document in the Desktop app.
2. Begin to customize the **Quick Access Toolbar** and ribbon tabs.
3. Switch computers with a classmate and start adding content to their document.
4. Switch with another classmate and add additional content.
5. Return to your computer and review the version history.
6. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. What are the main benefits of modifying an existing template rather than creating a new one?

*Select all that apply.*

- a. It saves time.
- b. Existing templates give you design ideas.
- c. There is an unlimited number of templates to choose from.
- d. All blank documents are created from the **Normal** template by default.



2. You've created a style and selected **For this document only**. You would like to share it with a friend that has been working on their own document. The best way to do this is to \_\_\_\_\_ the style.

*Fill in the blank.*

3. Which pre-designed elements are available in templates?

*Select all that apply.*

- a. Font
  - b. Styles
  - c. Macros
  - d. Pictures
4. The version history pane will allow you to \_\_\_\_\_ or \_\_\_\_\_ document versions.

*Fill in the blanks.*

# Lesson 3: Comparing and combining documents, and exploring AutoRecover options

## Overview

In this lesson, you'll learn how to compare and combine documents. You'll also set the **AutoSave** and **AutoRecover** options for Word. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts you learn about.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Use the \_\_\_\_\_ tab on the ribbon to access the **Compare** and **Combine** features.

*Fill in the blank.*

2. You can review the changes to a document using the **Compare** and **Combine** features in:

*Select all correct options*

- a. A new document.
- b. The original document.
- c. A view window.
- d. A revised document.

3. **Compare** and **Combine** do virtually the same function, with one small difference. What is that difference?

*Select the correct option.*

- a. You can only merge two documents in **Combine**.
- b. **Combine** allows you to create a new document.
- c. You can use **Combine** when the documents have been edited with track changes.
- d. **Compare** allows you to create a new document.

## Topic 1: Compare two Word documents



After you send a document out for review, you might get back multiple copies with revisions that you don't want to miss. In such situations, you can combine all the edits and ideas into one document. For example, if you're working in a collaborative group and you send out your research paper for your teammates to review, they might each make their own changes and then return them separately to you. The easiest way to review all of the changes done to your document is to use the **Compare** feature in Word.

To compare two versions of a document and merge them, you need to perform the following steps:

1. Open Word then select **Review** tab, in the **Compare** group, select **Compare**, and then in the sub-menu, select **Compare** again. The following screenshot depicts the **Compare** sub-menu.

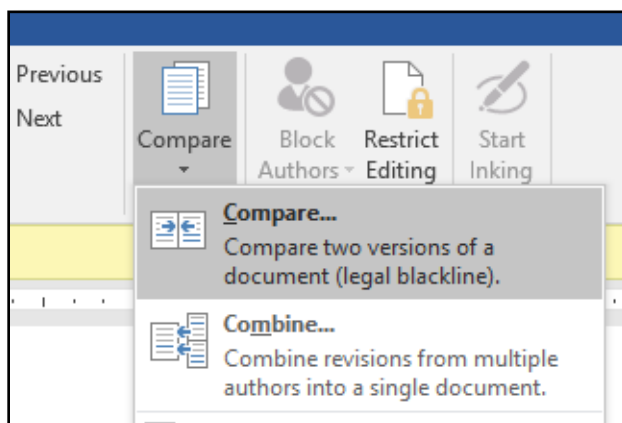


Figure 13: **Compare** sub-menu

2. In the **Compare Documents** dialog box, select the original document and the revised document. The following screenshot depicts the options within the **Compare Documents** dialog box.

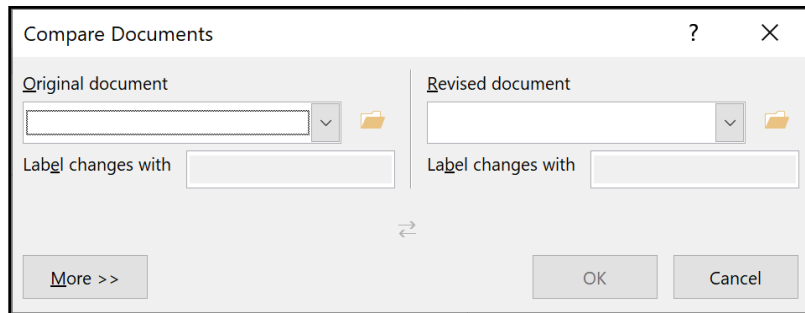


Figure 14: **Compare Documents** dialog box

3. From the **Original document** drop-down list, select the document you sent out for review. If you need to browse to the file's location, select the **Browse for original** folder icon.
4. From the **Revised document** drop-down list, select the document you want to compare your original document with.
5. In the **Label changes with** box, enter a name or phrase to make out who suggested the changes.
6. Select the **More >>** button to get additional options for comparing and combining the documents, as demonstrated in the following screenshot.

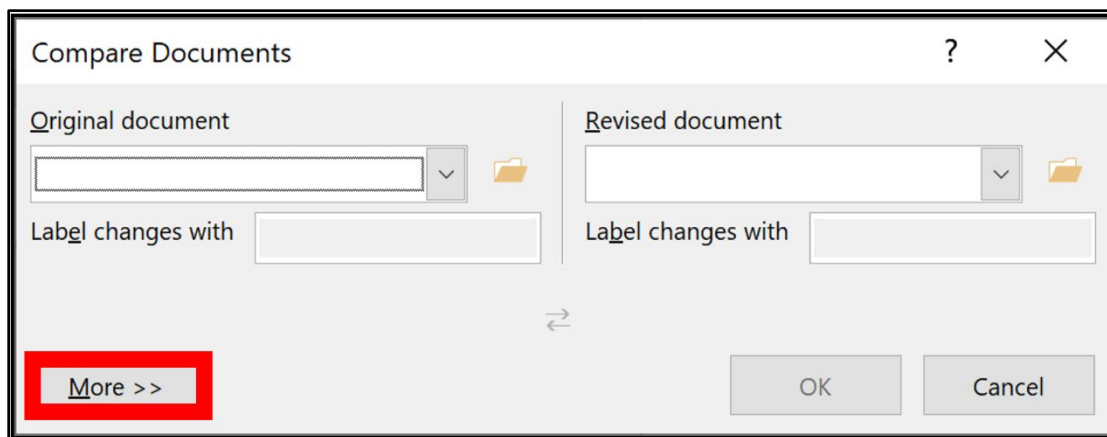


Figure 15: **Compare Documents** dialog box with the More button highlighted

- Under **Show changes in**, select how you would like the changes to display, and then select **OK**. The following screenshot depicts the options you can choose from.

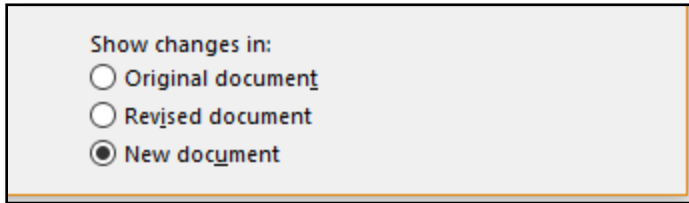


Figure 16: **Show changes in** options

Word opens a new document that's a combination of the original document and the copy you compared it to.

- To change the display options, in the **Compare** group, select **Compare**, and then in the sub-menu, select **Show Source Documents**. The following screenshot depicts the features within the **Show Source Documents** options.

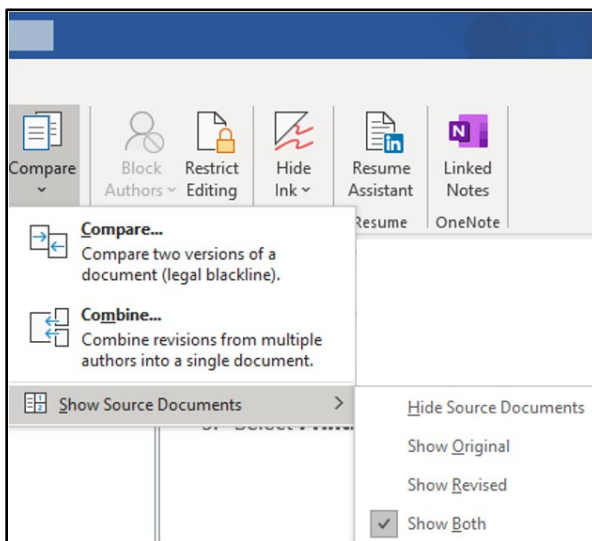


Figure 17: **Show Source Documents** options

- After you've resolved the combined changes the way you want, save the new document.

## Activity: Show and tell

In this activity, watch as your teacher demonstrates how to compare documents.

## Resources

None

## Activity instructions

Participate in the activity by following these instructions:

1. Observe as the teacher demonstrates how to compare documents.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Compare two Word documents



In this leveled try-it activity, you'll compare two versions of a document to create a combined document with all changes.

### Try-it 1

In this try-it, you'll compare two versions of the same document.

### Resources

You'll need the following resource for this try-it:

- Open **L3\_T1\_try1\_Kathy\_starter.docx** and **L3\_T1\_try1\_John\_starter.docx** in this lesson's **Learning Activity Resources** folder.

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Compare the changes done in the documents.
2. Do not save the compared document.

### Try-it 2

In this try-it, you'll compare and resolve the changes made to a document.

### Resources

You'll need the following resources for this try-it:

- Open **L3\_T1\_try2\_Kathy\_starter.docx** and **L3\_T1\_try2\_John\_starter.docx** in this lesson's **Learning Activity Resources** folder.

## Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Compare the documents.
2. Use track changes mode to resolve the changes made in the documents.
3. After you've resolved all changes, save your new document.

## Topic 2: Combine two Word documents



While working with others on a document, people use track changes and comments to point out what edits are made to the original document. If you have two different versions of the same document with Markup you can use the **Combine** feature to compare these documents, and combine them into a single document while retaining the comments and track changes. The resulting document displays edits from each version of the document in the track changes mode.

The process to compare and combine documents is almost the same. However, the difference between the two features is that:

- The **Compare** feature takes two documents that are similar (usually an original and an edited version, but without any tracked changes), and produces a version that displays tracked changes highlighting the differences between the two. In other words, Word creates the tracked changes. The resulting document will be identical to the edited version, with track changes turned on.
- The **Combine** feature takes two similar documents that already contain tracked changes (usually two versions of the same original document that have been edited by different reviewers), and produces a version with both sets of edits displaying with tracked changes. However, note that the **Combine** feature can only keep one set of formatting changes.

To combine two versions of a document, you need to perform the following steps:

1. Select the **Review** tab, in the **Compare** group, select **Compare**, and then from the sub-menu, select **Combine**. The following screenshot depicts the **Combine** option.

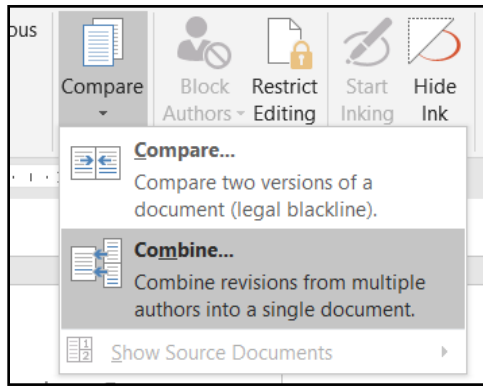


Figure 18: **Combine** option

2. In the **Combine Documents** dialog box, select the original document and the revised document, as depicted in the following screenshot.

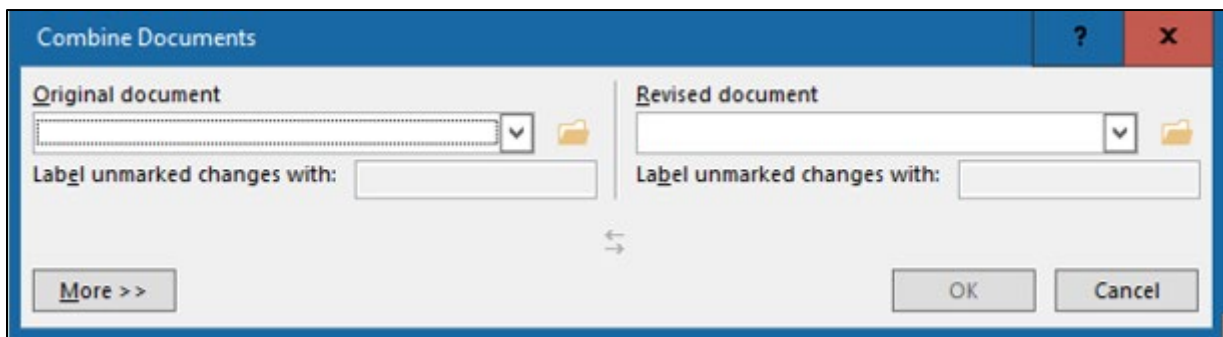


Figure 19: **Combine Documents** dialog box

3. From the **Original document** drop-down list, select the document you sent for review. If you need to browse to the file's location, select the **Browse original documents** folder icon.
4. From the **Revised document** drop-down list, select the document you want to merge (usually your original document).
5. In the **Label changes with** box, enter a name or phrase to remind you who suggested the changes.



6. Select the **More** button to access additional options for combining the documents, as depicted in the following screenshot.

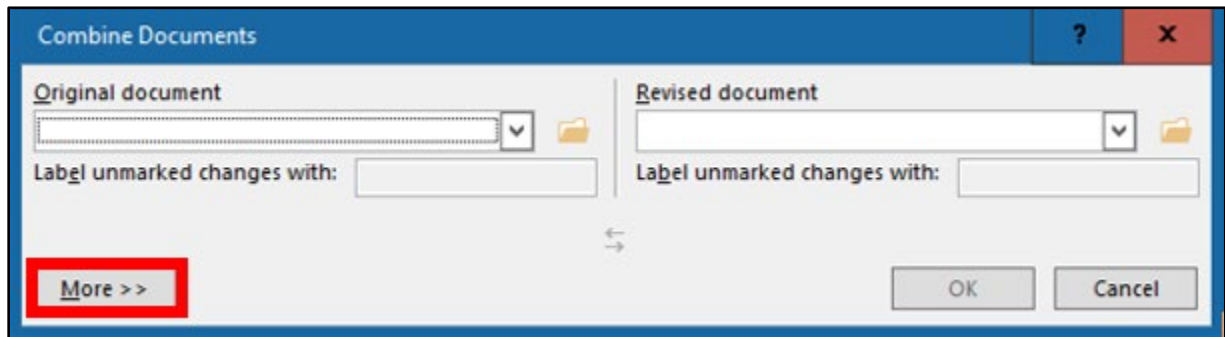


Figure 20: **Combine Documents** dialog box

7. Under **Show changes in**, select how you would like to review the changes by selecting from one of the options in the following screenshot, and then select **OK**.

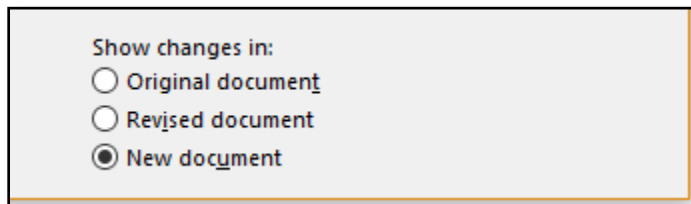


Figure 21: **Show changes in** options

Word opens the document that combines the original document and the copy you are comparing it to.

8. To change the display options, in the **Compare** group, select **Compare**, and then in the sub-menu, select **Show Source Documents**. The following screenshot depicts the features within the **Show Source Documents**.

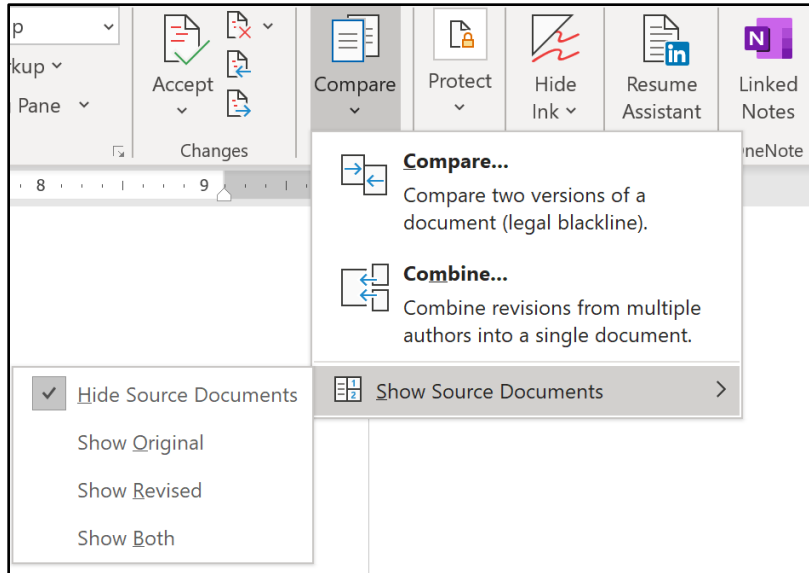


Figure 22: **Show Source Documents** option

9. After you've resolved the combined changes, save the document.



#### Additional information

For more information on combining document revisions, go to:  
[Combine document revisions](#)

---

## Activity: Discuss and learn

In this activity, you'll discuss what you learned about comparing and combining two document versions.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Discuss with a partner how you compared your two documents.
2. Use that knowledge to go through the steps to combine two documents.
3. Discuss the differences, and when you would use **Combine** instead of **Compare**.
4. Ask the teacher clarifying questions.

## Try-it: Combine two Word documents



In this standalone try-it activity, you'll combine two documents that have been reviewed with track changes on.

### Try-it

In this try-it, you'll combine two documents, review the changes, make the appropriate changes, and then save the new document.

### Resources

You'll need the following resources for this try-it:

- Open **L3\_T2\_try\_Kathy\_tracked\_starter.docx** and **L3\_T2\_try\_John\_tracked\_starter.docx** in this lesson's **Learning Activity Resources** folder.

### Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Combine the documents.
2. Review the changes.
3. Accept or reject the changes in the document as you review them.
4. Save your new document.

## Topic 3: Set AutoSave and AutoRecover options

Everyone knows how frustrating it is when you continue working on a document without saving the changes made in it, and then something happens. Thankfully, Word 2019 is equipped with an **AutoSave** feature that saves the document automatically, if you don't. After you save the document for the first time and set the **AutoSave** and **AutoRecover** options, you can easily recover the documents if something unexpected happens to it.

To set the **AutoRecover** options, you need to perform the following steps:

1. On the **File** tab, select **Options**.
2. In the **Word Options** dialog box, select **Save**. In the **Word Options** dialog box, there are various **AutoRecover** settings, that include:
  - **Save files in this format**, to set the type of document
  - **Save AutoRecover information every**, to set the time in minutes
  - **Keep the last AutoRecovered version if I close without saving** option for where you would like to save the version before closing.
  - **AutoRecover file location** option to set the folder location for files.

The following screenshot depicts the features within the **Word Options** dialog box.

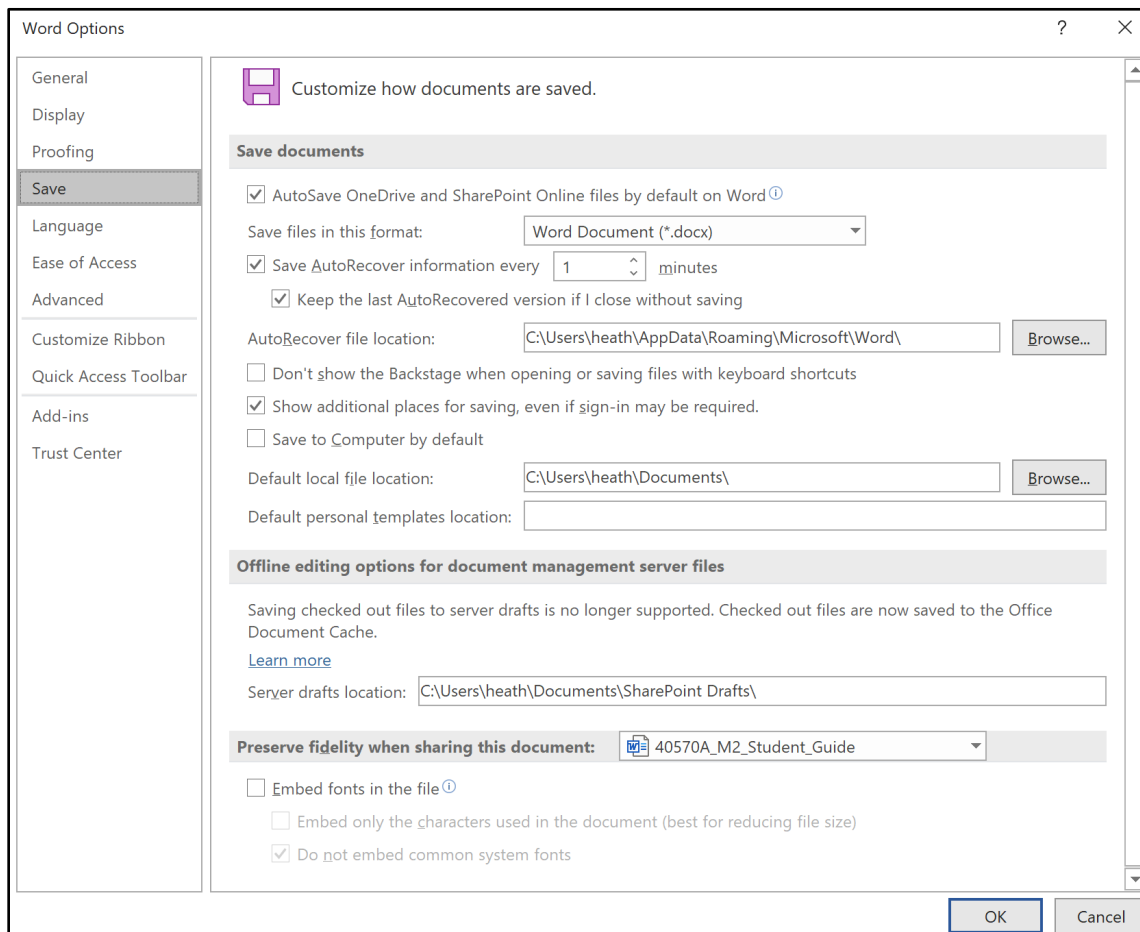
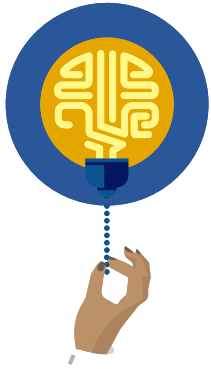


Figure 23: **Word Options** dialog box



### Did you know?

**AutoSave** is a new feature that's also available in Microsoft Excel, Word, and Microsoft PowerPoint for Microsoft Office 365 subscribers. This feature saves your files automatically, every few seconds, as you work.



### Additional information

For more information on **AutoSave**, go to: [What is AutoSave?](#)

---

## Activity: Show and tell

In this activity, your teacher will demonstrate how to change the **AutoSave** options and locate the automatically recovered files.

### Resources

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher as they demonstrate how to change the **AutoSave** options and locate the automatically recovered files.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Set AutoSave and AutoRecover options



In this standalone try-it activity, you'll change the **AutoSave** settings and the **AutoRecover** location.

## Try-it

In this try-it, you'll change the **AutoSave** settings to **1** minute, and change the default **AutoRecover** location. You'll then open a document from the **AutoRecover** folder location.

## Resources

None

## Instructions

The following steps are the general tasks that you need to perform during this try-it:

1. Open a blank document.
2. Change the **AutoSave** setting to every **1** minute.
3. Change the default **AutoRecover** location, and check your settings:
  - a. Save the blank document.
  - b. For at least one minute, enter text in the document to describe why it's important to change the **AutoSave** option to less than 10 minutes, and explain how to change the **AutoSave** settings.
  - c. Close the document without saving.
  - d. Go to your **AutoRecover** folder and open the document that was saved automatically.
  - e. Verify the text you entered still there.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. When you need to review two similar documents that have been edited using track changes, you should select \_\_\_\_\_ under **Review** > **Compare**.

*Fill in the blank.*

2. Use \_\_\_\_\_ to adjust the viewing options when you work with multiple documents, and use the **Compare** and **Combine** features.

*Fill in the blank.*

3. You would like to compare two documents. What is the correct sequence of steps to do this?

*Indicate the correct sequence by adding numbers 1-4 next to the following items.*

- a. From the **Revised Document** drop-down list, select the document you want to compare. \_\_\_\_\_
- b. Select **Review > Compare > Compare**. \_\_\_\_\_
- c. From the **Original Document** drop-down list, select the document.  
\_\_\_\_\_
- d. In the **Label changes with** text box, enter a name or phrase so you'll know who suggested the changes. \_\_\_\_\_

# Glossary

The following table defines the key terms used in the module.

<b>AutoSave</b>	A <b>Word</b> feature that automatically saves an open document saved in OneDrive or SharePoint based on the AutoSave configuration.
<b>Built-in styles</b>	Styles available in the <b>Styles</b> gallery.
<b>Business plan</b>	A document detailing a business's future objectives, and strategies for achieving them.
<b>Compare features</b>	A feature that allow you to compare two documents and accept or reject changes to make a new document.
<b>Combine feature</b>	A feature that allows you to compare two documents from multiple authors when tracked changes and comments are used then accept or reject changes to make a new document.
<b>Custom templates</b>	Documents that you design and save as templates for reuse.
<b>Dialog box launcher</b>	A small icon that appears in a group that you use to open related dialog boxes or task panes, which provide more options for that related group.
<b>Formatting</b>	Refers to the how words or paragraphs display, and includes settings such as font style, color, size, and spacing.
<b>Heading</b>	A text style that has set formatting but also cross-references to the Table of Contents.
<b>Manage Styles</b>	A dialog box from where users create and edit all styles in a document.
<b>Properties</b>	Document properties, also known as <i>metadata</i> , are details about a file that describe or identify it. They include details such as title, author name, subject, and keywords that identify the document's topic or contents.



<b>Quick Access Toolbar</b>	A customizable toolbar containing a set of commands independent of any tab on the ribbon that currently displays. You can move the <b>Quick Access Toolbar</b> from one of the two possible locations, and you can add options (in the form of icons) to the <b>Quick Access Toolbar</b> .
<b>Style</b>	A predefined combination of font style, color, and size that can be applied to any text in your document. Styles can help your documents achieve a more professional appearance. You can also use styles to quickly change several things in your document at the same time.
<b>Styles gallery</b>	A library of styles that you access from the <b>Home</b> tab.
<b>Task pane</b>	A multipurpose window pane that displays on the side of the window of any Office application, and displays relative information.
<b>Template</b>	A pre-formatted file that serves as a starting point for a new document.
<b>Track changes</b>	A feature that, when turned on, captures any changes made to the document. They are color-coded based on who is making the changes and what level of markup is displayed.
<b>Version history</b>	A feature that provides access to old copies of files. It includes a version number, the size of each version, and who created each version and when.

*Table 2: Glossary terms and definitions*

# Cornerstone

## Overview

Use this cornerstone activity to reinforce skills learned throughout this module, and to prepare for the certification test exam objectives. Your goal is to complete each task as quickly as possible with 100 percent accuracy.

You have been asked to create the final version of the **Munson's Company Overview** document. You'll work on documents drafted by your team, compare changes made in each version for future reference, and create a final document based on the comments and changes suggested. Finally, you'll update the styles and template settings in your documents to meet the Munson's formatting standards.

## Objectives

The following table outlines the cornerstone objectives and their corresponding MOS exam objectives.

Cornerstone objectives	MOS Exam objective(s)
Modify existing document templates	1.1.1: Modify existing document templates
Manage document versions	1.1.2: Manage document versions
Compare and combine multiple documents	1.1.3: Compare and combine multiple documents
Change the <b>Normal</b> template default font	1.1.8: Change the Normal template default font
Create paragraph and character styles	2.3.1: Create paragraph and character styles
Modify existing styles	2.3.2: Modify existing styles
Copy styles to other documents or templates	2.3.3: Copy styles to other documents or templates

*Table 3: Cornerstone objectives*

# Duration

50 minutes

## Instructions

1. Complete the tasks for each file.
2. When saving your file, add your name to the end of the filename, for example: **Company\_Espino**. Follow your teacher's directions for where to save your file.
3. When you're done with the cornerstone, assess your completion and enter the points you think you earned within the following task. You can ask for help from your teacher if you need it.

## Tasks

You'll work with two files in this cornerstone. The following steps are the tasks you need to complete within each file.

### File 1: Cornerstone\_company\_starter.docx

#### Task: Save a new version of a document (2 points)

1. Open **Cornerstone\_company\_starter.docx** and save it to your OneDrive. (0) points)  
(Exam objective N/A)
2. Using your **Quick Access Toolbar** to ensure **AutoSave** is enabled. (0 points) (Exam objective N/A)
3. Begin making a few changes throughout the text. (0 points) (Exam objective N/A)
4. Open an earlier version of the document. (1 point) (Exam objective 1.1.2)
5. Save the new version as a separate file with the name **Cornerstone\_company\_revised.docx**. (1 point) (Exam objective 1.1.2)
6. Close the revised document.

Points scored: \_\_\_\_\_ / 2

#### Task: Customize, apply, and copy styles (8 points)

1. Modify the **Heading 1** style. (1 point) (Exam objective 2.3.2)
2. Modify the **Heading 2** style. (1 point) (Exam objective 2.3.2)

3. Create your own style to format your paragraphs, and make sure to add advanced formatting options. (1 point) (Exam objective 2.3.2)
4. Apply each style in your document. (3 points) (Exam objective 2.3.2)
5. Copy the styles from your current file into the **Normal** template. (2 points) (exam objective 2.3.3)

Points scored: \_\_\_\_\_ / 8

### Task: Use AutoRecover options (3 points)

1. Change the **AutoRecover** option to save every **3** minutes. (1 point) (Exam objective N/A)
2. Change the **AutoRecover** location. (1 point) (Exam objective N/A)
3. Manage the document and recover the unsaved version. (1 point) (Exam objective N/A)

Points scored: \_\_\_\_\_ / 3

### Task: Compare documents (5 points)

1. Compare the **Cornerstone\_company\_starter.docx** document with **Cornerstone\_company\_revised.docx**. (1 point) (Exam objective 1.1.3)
2. Display changes in a new document. (1 point) (Exam objective 1.1.3)
3. Label the changes with your name. (1 point) (Exam objective 1.1.3)
4. **Accept** or **reject** changes as you want. (1 point) (Exam objective 1.1.3)
5. Save the new document. (1 point) (Exam objective 1.1.3)

Points scored: \_\_\_\_\_ / 5

FILE 1 TOTAL POINTS: \_\_\_\_\_ /18

## File 2: Cornerstone\_overview\_starter.docm

### Task: Enable macros (3 points)

1. Open the document and enable the macros in the backstage display. (1 point) (Exam objective 1.1.5)
2. Review the macro setting in the **Trust Center**. (1 point) (Exam objective 1.1.5)
3. Save the document in your OneDrive as a Word document (.docx). (1 point) (Exam objective N/A)

Points scored: \_\_\_\_\_ / 3

### Task: Change the Normal template default font (4 points)

1. Change the default font and save it in the **Normal** template. (1 point) (Exam objective 1.1.8)
2. Modify the **Heading 1** style in this document. (1 point) (Exam objective 1.1.8)
3. Create a new style for bullets in this document. (1 point) (Exam objective 1.1.8)
4. Apply the new styles in your document. (1 point) (Exam objective N/A)

Points scored: \_\_\_\_\_ / 4

### Task: Version control (4 points)

1. Review the **AutoSave/AutoRecover** options. (1 point) (Exam objective N/A)
2. Add an editing language. (1 point) (Exam objective 1.3.1)
3. Copy and paste the first paragraph. Translate the paragraph into another language. (1 point) (Exam objective 1.3.2)
4. Use version control to open a previous version and save it to your OneDrive as **Cornerstone\_Overview\_Revised.docx**. (1 point) (Exam objective 1.1.2)

Points scored: \_\_\_\_\_ / 4

### Task: Combine documents (3 points)

1. Compare the **Cornerstone\_overview\_starter.docx** and **Cornerstone\_overview\_revised.docx** for formatting changes in the revised document. (3 points) (Exam objective 1.1.3)
2. Save and close the documents. (0 points) (Exam objective N/A)

Points scored: \_\_\_\_\_ / 3

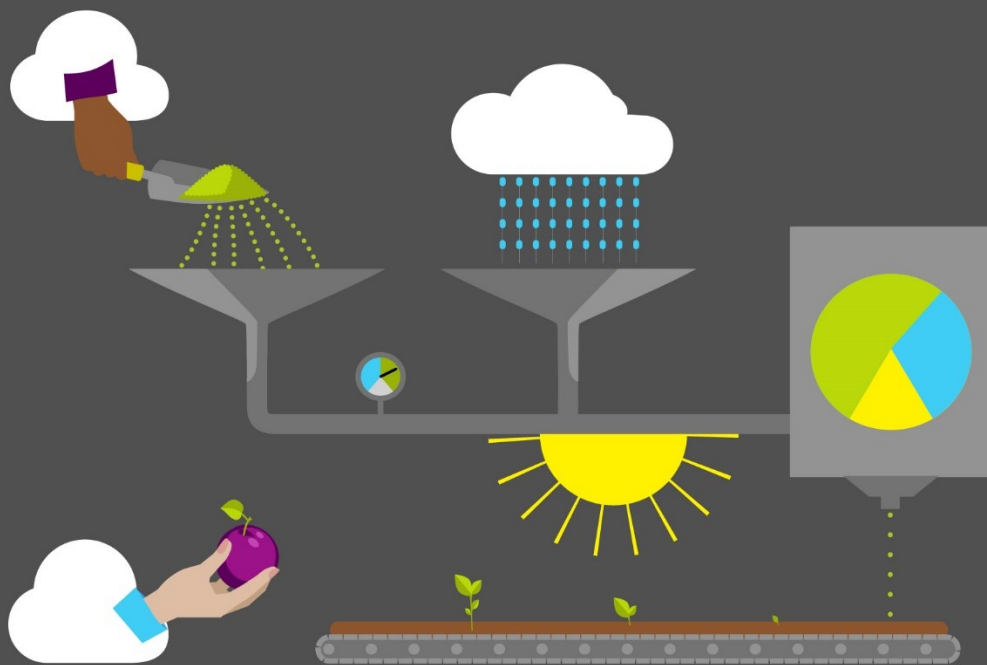
### Task: Work with templates (6 points)

1. Open a new document based on a Business Report Template. (1 point) (Exam objective N/A)
2. Copy the styles from **Cornerstone\_overview\_starter.docx** to your new report. (1 point) (Exam objective 2.3.3)
3. Make additional changes to the document styles. (1 point) (Exam objective 2.3.2)
4. Customize your **Quick Access Toolbar** using the **Word Options** window. (1 point) (Exam objective 1.1.6)

5. Customize your **Ribbon Toolbar** using the **Word Options** window. (1 point) (Exam objective 1.1.7)
6. Save the file as a template. (1 point) (Exam objective 1.1.1)

Points scored: \_\_\_\_\_ / 6

FILE 2 TOTAL POINTS: \_\_\_\_\_ /20



# Student Guide

40570A

Microsoft Word expert 2019

Module 3: Creating reusable content and custom design elements

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## Creating reusable content and custom design elements

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# Module overview

## Description

As you've learned in the previous modules, you can change the default font to save time and maintain formatting in your Microsoft Word documents. In this module, you'll take that a step further and create document themes and style sets. But first, you'll create, add, and organize **Quick Parts** and **AutoText** to use across documents.

The following table lists the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Creating and adding Quick Parts and AutoText	Create and add Quick Parts and AutoText.	<ul style="list-style-type: none"> <li>• 3.1.1</li> </ul>
Organizing Quick Parts	Organize Quick Parts.	<ul style="list-style-type: none"> <li>• 3.1.2</li> </ul>
Creating a custom document theme	Create custom document themes.	<ul style="list-style-type: none"> <li>• 3.2.1</li> <li>• 3.2.2</li> <li>• 3.2.3</li> </ul>
Creating a custom Styles set	Create a custom Styles set.	<ul style="list-style-type: none"> <li>• 3.2.4</li> </ul>
Applying document settings	Apply paste options, configure hyphenation and line numbers, and set paragraph pagination options.	<ul style="list-style-type: none"> <li>• 2.1.3</li> <li>• 2.2.1</li> <li>• 2.2.2</li> </ul>

Lesson	Learning objective	Exam objective(s)
Cornerstone: Finalizing a newsletter for review	Create reusable content with Quick Parts and AutoText. Then work with existing and custom style sets and themes to quickly apply consistent formatting throughout a document.	<ul style="list-style-type: none"> <li>• 2.2.1</li> <li>• 2.1.3</li> <li>• 2.2.2</li> <li>• 3.1.1</li> <li>• 3.1.2</li> <li>• 3.2.1</li> <li>• 3.2.2</li> <li>• 3.2.3</li> <li>• 3.2.4</li> </ul>

*Table 1: Objectives by lesson*

## Scenario

During this module, you'll learn how to create reusable content with Quick Parts and Auto Text. Then you'll work with existing and custom styles to quickly apply consistent formatting throughout a document. This scenario is a great opportunity to apply what you'll learn and show off your newly learned skills.

As part of their marketing campaign to introduce Munson's Pickles and Preserves Farm's Community Supported Agriculture (CSA) program to area businesses and consumers, the CSA program staff plans to send a monthly newsletter. You've been asked to create a draft of the first newsletter to be saved as a template. You'll start from a built-in Microsoft Word newsletter template and include specific the branding and styles adopted by Munson's Pickles and Preserves Farm.

## Cornerstone

At the end of this module, you'll finalize the first edition of the Munson's Pickles and Preserves Farm CSA Program newsletter! However, you learned that the draft document requires a few changes. You'll need to update the styles and theme, and then apply paste options, configure hyphenation and line numbers, and set paragraph pagination options for final review before the noon deadline.

# Lesson 1: Creating and adding Quick Parts and AutoText

## Overview

In this lesson, you'll learn how to create and add **Quick Parts** and **AutoText**. You'll participate in discussions, engage in activities in which you'll work with your peers, and follow your teacher through step-by-step demonstrations. These activities will help you in the leveled try-its, where you'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. All the following are built in **Building Blocks** except for:

*Select the correct option.*

- a. Headers
- b. Heading 2
- c. Bibliography
- d. Quick Tables

2. You can add the following from the **Quick Parts Gallery**:

*Select all that apply.*

- a. Document properties
- b. AutoText
- c. Text box
- d. Field

3. Banded headers, text box sidebars, and page numbers are all examples of predefined

---

*Fill in the blank.*

# Topic 1: Add content from a Building Block



How often do you use a predesigned header or footer? Have you used Word **Quick Tables** to apply formatting and design to save time? Well, these predesigned blocks of text and formatting are known as **Building Blocks**, and they're available for easy insertion in Word. They include preformatted headers, footers, page numbers, text boxes, cover pages, watermarks, **Quick Tables**, tables of content, bibliographies, and equations. You can use these predesigned **Building Blocks** for all documents, regardless of which template you used to create the documents.

You can access **Building Blocks** from the **Insert** tab. The following screenshot depicts some of the features on the **Insert** tab:

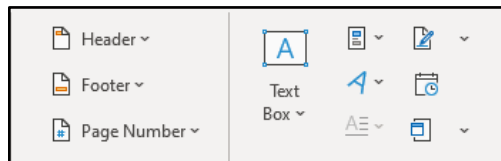
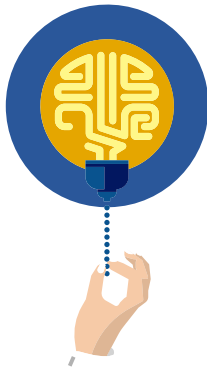


Figure 1: The **Insert** tab



## Did you know?

After you insert a **Building Block** in your document, you can customize its formatting and properties without affecting the **Building Block** that is stored in the template.



## Additional information

For more information on Building Blocks, go to: [Create and use content Building Blocks in Word documents](#)

## Activity: Tell a story

In this activity, you'll get ready to share a story. The teacher will share the details. Next, you'll learn and then explore for yourself how **Quick Parts** inserts prebuilt components into a document to speed up work and reduce repetitive tasks. You'll also understand how you can save any document content as a prebuilt **Building Block**.

### Resources required

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Think about your daily routine: what tasks or processes do you do every day that you really don't like to do? What if you could push a button and that task would be quickly done? Get ready to share your story in class, based on direction from your teacher.
2. Locate the available **Building Blocks** on the **Insert** tab, including headers, Quick Tables, and text boxes.
3. Ask the teacher clarifying questions.

## Try-it: Add content from a Building Block



In this leveled try-it activity, you'll practice adding content from **Building Blocks**.

### Try-it 1

In this try-it, you'll insert a banded header and text box sidebar.

### Resources

- None

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Insert a banded header with the text **Munson's Pickles and Preserves Farm**.

3. Insert a banded sidebar text box and enter the following text:

**CSA (Community Supported Agriculture) project for community members to become “farm members” and purchase shares of the produce to feed their families. Each week, members receive a box of fresh produce. Members can participate in farm events such as workdays, potlucks, and you-pick gardens to experience the joy of harvesting their own food.**

4. Save and close the document.

## Try-it 2

In this try-it, you'll insert a banded header and a matrix table.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Insert a banded header with the text **Munson's Pickles and Preserves Farm**.
3. Insert a matrix table.
4. In the header row, enter the following column headings:
  - a. Name
  - b. Department
  - c. Favorite pickle flavor
  - d. Favorite preserve flavor
  - e. Ideas for the Newsletter
5. Explore additional **Building Blocks** such as built-in footer, page numbers, and **SmartArt**, and add at least one that will enhance your design.
6. Save and close the document.

## Topic 2: Create a Building Block entry in the Quick Parts Gallery



Think about how much time you can save by having a logo, a signature or email, and a phone number that is set for your usage and organized in one location. You can use the **Quick Parts Gallery** to create, store, and reuse pieces of content.



The following options are available in the **Quick Parts Gallery**:

- **AutoText** – is reusable content that you can store and access again and again.
- **Document Property** – is a list of properties that you can insert in your document.
- **Field** – is an automatically updated piece of information.
- **Building Blocks Organizer** – offers a preview of all the **Building Blocks** available in Word.

To add existing text to the **Quick Parts Gallery**, perform the following steps:

1. Select a phrase, sentence, or other portion of your document.
2. On the **Insert** tab, in the **Text** group, select **Quick Parts**. The following screenshot depicts **Quick Parts**:

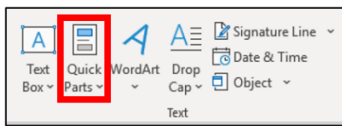


Figure 2: **Quick Parts** option

3. Then select **Save Selection to Quick Parts Gallery**. The following screenshot depicts this:

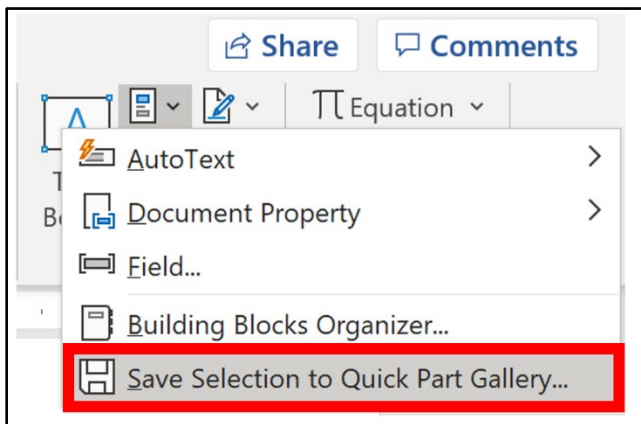


Figure 3: **Save Selection to Quick Parts Gallery** option highlighted

To use **Quick Parts**, you need to open the **Quick Parts Gallery**. To open the gallery, on the **Insert** tab, in the **Text** group, select **Quick Parts**.



### Additional information

For more information on creating a Building Block entry in the **Quick Part Gallery**, go to: [Use Quick Parts and AutoText in Word](#)

## Activity: Discuss and learn

In this activity, your teacher will ask you a few questions to begin a discussion on **Quick Parts**. Your teacher will explain the **Quick Parts Gallery** and how to add content to your gallery.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.

## Try-it: Create a Building Block entry in the Quick Parts Gallery



In this leveled try-it, you'll practice creating new **Building Blocks** and using them in your documents.

### Try-it 1

In this try-it, you'll insert a predesigned header, and then create a signature line **Building Block** and add it to your **Quick Parts Gallery**.

### Resources

- None

### Instructions

The following are the steps that you must perform during this try-it:

1. Open a new blank document.
2. Use a formatted header to add the text **Munson's Pickles and Preserves Farm**.
3. Create a short paragraph explaining the newsletter's purpose.
4. Add a Microsoft Office Signature line with your name, title, and email.
5. Save the signature line as a **Quick Part**.
6. Save and close the document.

## Try-it 2

In this try-it, you'll insert a predesigned header and create a signature line **Building Block**. Then you'll add the signature line and logo to your **Quick Parts Gallery**.

### Resources

You'll need the following resource for this activity:

- **Munsons\_logo\_banner\_large\_illustration.png** in the media Learning Activity Resources.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Insert the Munson's banner logo.
3. Create a short paragraph explaining the newsletter's purpose.
4. Add a Microsoft Office Signature line with your name, title, and email.
5. Save the signature line as a **Quick Part**.
  - o Name: Signature
6. Save the logo as a **Quick Part**.
  - a. Name: Munson's banner logo
  - a. Category: Munson's Images
7. Save the document and keep it open for the next lesson.

## Topic 3: Create an AutoText entry in the Quick Parts Gallery



**AutoText** allows you to store reusable parts of your document such as paragraphs, headers, and footers. This avoids reentering text that you commonly use in your documents, like your name and class information. Using **AutoText** can save time and increase your productivity.

To create **AutoText**, perform the following steps:

1. From the **Insert** tab, select **Quick Parts**.
2. Select **AutoText**.

3. Select **Save Selection to AutoText Gallery**. The following screenshot depicts this:

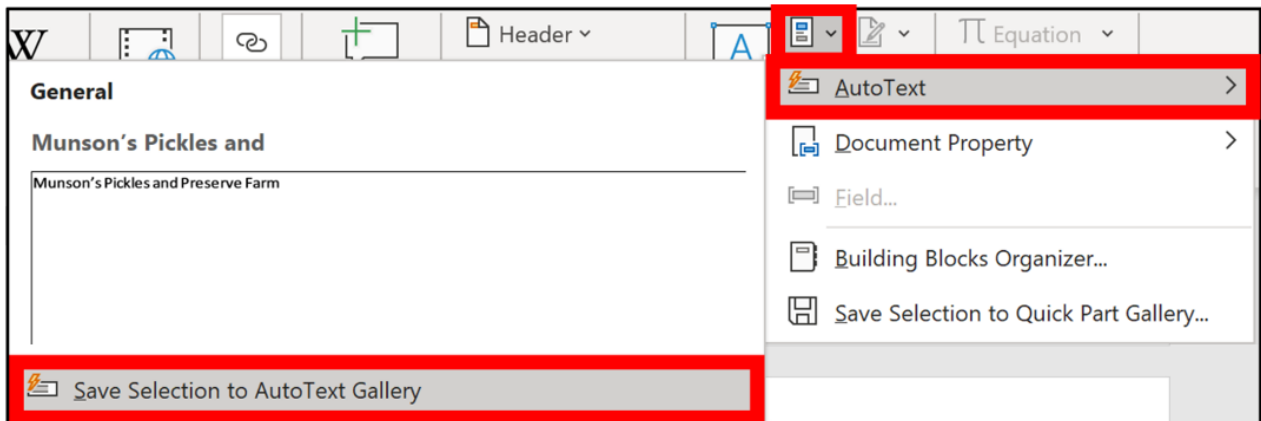
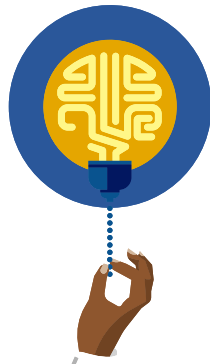


Figure 4: **Save Selection to AutoText Gallery** option

To use **AutoText** in a document, begin entering the name of your **AutoText**. When the prompt appears, select **Enter**. Or, Select **Insert** > **Quick Parts** > **AutoText**.



#### Did you know?

**AutoText** can handle large chunks of text, including headings and paragraph formatting, and is stored as part of your Word template. Alternatively, for a maximum of 255 characters that will be used in all your Office apps, use **AutoCorrect** to replace a few characters with your full text.



#### Additional information

For more information on creating reusable content, go to: [Create reusable text snippets](#)

---

## Activity: One step back, two forward

In this activity, you'll think about how you saved a new **Quick Part** in the gallery and predict how to save **AutoText**.

### Resources required

- None

## Activity instructions

Participate in the activity by following these instructions:

On a piece of paper or in a new blank Word document, record your responses to the following prompts:

1. Think about the most important things that you learned or performed in the previous topic and list any two of them.
2. Continue to list two things that you think you might learn about **AutoText** in this topic.
3. Record the steps that you think you'll take to add **AutoText** to the **Quick Part Gallery**.
4. Share your thoughts with a classmate.

## Try-it: Create an AutoText entry in the Quick Parts Gallery



In this leveled try-it activity, you'll practice creating new **AutoText** parts and inserting them into your document.

### Try-it 1

In this try-it, you'll save **AutoText** and a **Quick Part** in the gallery.

## Resources

You'll need the following resource for this activity:

- Use the document from the previous try-it or open **L1\_T3\_try1\_autotext\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Create **AutoText** of the paragraph.
2. Close the document.
3. Use a new blank document or a letter template.
4. Insert Munson's address as the return address: **234 Bridge Street, Edison WA**.
5. Create a **Quick Part** for the address block.
6. Address the document to all Munson's employees.

7. Use the **AutoText** that you created for the paragraph by beginning to enter the name you assigned to the **AutoText**.
8. Insert your signature block from the **Quick Parts Gallery**.
9. Save and close the document.

## Try-it 2

In this try-it, you'll save **AutoText** and a **Quick Part** in the gallery, and then create your own custom **Quick Parts** and **AutoText**.

## Resources

You'll need the following resource for this activity:

- Use the document from the previous try-it or open **L1\_T3\_try2\_autotext\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Create an AutoText of the paragraph.
2. Close the document.
3. Use a letter template.
4. Insert Munson's address as the return address: **234 Bridge Street, Edison, WA**.
5. Create a **Quick Part** for the address block.
6. Address the document to: **All Munson's employees**.
7. Use the **AutoText** that you created for the paragraph by beginning to enter the name that you assigned to the **AutoText**.
8. Insert your signature block from the **Quick Parts Gallery**.
9. Save and close the document.
10. What other items do you frequently use in your documents? Create at least three **Quick Parts** or **AutoText** entries to use in future documents.

## Try-it 3

In this try-it, you'll save **AutoText** and a **Quick Part** in the gallery, create your own custom **Quick Parts** and **AutoText**, and then apply custom styles.

## Resources

You'll need the following resource for this activity:

- Use the document from the previous try-it, or open **L1\_T3\_try3\_autotext\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the steps that you must perform during this try-it:

1. Create **AutoText** of the paragraph text with the option **insert contents in its own page**.
2. Insert the paragraph.
3. Insert Munson's address as the return address: **234 Bridge Street, Edison WA**.
4. Create a **Quick Part** for the address block.
5. Address the document to: **All Munson's employees**.
6. Use the **AutoText** that you created for the paragraph by beginning to enter the name that you assigned to the **AutoText**.
7. Insert your signature block from the **Quick Parts Gallery**.
8. Apply the character and paragraph style from the document that you created in the previous module. If you can't find the style, import it from a previous document, and then apply the style.
9. What other items do you frequently use in your documents? Create at least three **Quick Parts** in your gallery or **AutoText** to use in future documents.
10. Save and close the document.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. You've been working on your newsletter and realize that you keep entering the phrase Munson's Pickles and Preserve Farm. What should you use to create reusable content?

*Select the best option.*

- a. **Quick Parts Gallery**
  - b. **Field**
  - c. **Building Blocks Organizer**
  - d. **AutoText**
2. To insert **AutoText**, you can select **Quick Parts** > **AutoText** or

---

*Fill in the blank.*

3. What are some of the options available in the **Document Property Quick Part**?

*Select all that apply.*

- a. Owner
- b. Keywords
- c. Math Settings
- d. Page Numbers



# Lesson 2: Organizing Quick Parts

## Overview

In this lesson, you'll learn how to edit and delete **Building Blocks** from the **Quick Parts Gallery**. You'll rewrite a user guide and discuss your ideas with a classmate. These activities will help you in the leveled try-its, where you'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Use the \_\_\_\_\_ to view, edit, and delete all **Quick Parts**.  
*Fill in the blank.*
2. To change a **Quick Part**, you can make the changes to the **Quick Part** after you have inserted it into the document, and then save it as \_\_\_\_\_.  
*Fill in the blank.*

## Topic 1: Edit a Building Block from the Quick Parts Gallery



Information that you have included in a **Quick Part**, such as an address or telephone number, might change over time. Instead of starting over, you can simply modify the **Building Block** properties. You can also change a **Quick Part** by replacing the **Building Block**.

## Change the content of a Quick Part

1. Select where you want to insert the **Building Block**.
2. On the **Insert** tab, in the **Text** group, select **Quick Parts**, and then select **Building Blocks Organizer**. If you know the name of the building block, select **Name** to sort by name.

3. Select **Insert**.
4. Make your changes to the **Building Block**.
5. Select the revised text.
6. On the **Insert** tab, in the **Text** group, select **Quick Parts**, and then select **Save Selection to Quick Parts Gallery**.
7. In the **Create New Building Block** dialog box, enter the original name, category, and gallery for the **Building Block** entry, and then select **OK**.
8. When asked whether you want to redefine the **Building Block** entry, select **Yes**.

## Activity: User-guide rewrite

Use Word **Help** to find the steps to modify and rename a **Quick Part**. Then rewrite the steps to be more user friendly.

### Resources required

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Open a new blank document.
2. Use Word **Help** to research modifying the **Quick Parts Gallery**.
3. In your document, enter the steps to complete updating a **Quick Part**, then enter the steps to renaming a document.
4. Save and close the document.

## Try-it: Edit a Building Block from the Quick Parts Gallery



In this leveled try-it activity, you'll practice modifying a **Building Block** from the **Quick Parts Gallery**.

### Try-it 1

In this try-it, you'll update the Munson's address to include the ZIP code, and then update it to the **Quick Parts Gallery**.

## Resources

You'll need the following resource for this activity:

- Open **L2\_T1\_try1\_updateqp\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Modify the Munson's address block to include the ZIP code, **10215**.
2. Update the **Quick Part**.
3. Save and close the document.

## Try-it 2

In this try-it, you'll update the Munson's address to include the ZIP code, update it to the **Quick Parts Gallery**, and edit the paragraph **AutoText**.

## Resources

You'll need the following resource for this activity:

- Open **L2\_T1\_try2\_updateqp\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Modify the Munson's address block to include the ZIP code, **10215**.
2. Update the **Quick Part**.
3. Change the paragraph **AutoText** to include the information about the publication date of the first newsletter.
4. Save and close the document.

## Try-it 3

In this try-it, you'll update Munson's address to include the ZIP code, update it to the **Quick Parts Gallery**, edit the paragraph **AutoText**, and modify the paragraph properties.

## Resources

You'll need the following resource for this activity:

- Open **L2\_T1\_try3\_updateqp\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Modify the Munson's address block to include the ZIP code, **10215**.
2. Update the **Quick Part**.
3. Change the paragraph **AutoText** to include the information about the publication date of the first newsletter.
4. Modify the paragraph properties to **insert as its own paragraph** in the text box gallery.
5. Save and close the document.

## Topic 2: Delete a Building Block



If you are no longer using a **Building Block**, you'll want to delete it so that your gallery doesn't get overcrowded. By accessing the **Building Blocks Organizer**, you can delete obsolete **Building Blocks**.

To delete a **Building Block**, perform the following steps:

1. From the **Quick Parts Gallery**, right-click or access the context menu on the **quick part** that you want to change and select **Organize and Delete**. The following screenshot depicts the **Building Blocks Organizer** window.

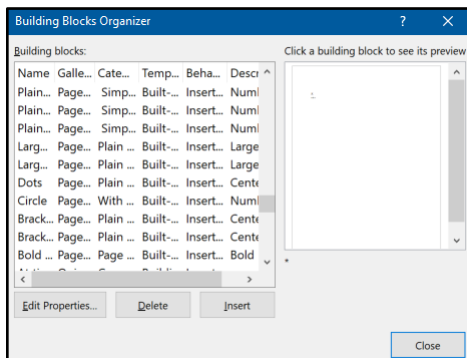


Figure 5: The **Building Blocks Organizer** window

2. Select **Delete** to remove the Building Block.

## Activity: Think-Pair-Share

In this activity, you'll think about how you modified a **Building Block** and how that process relates to deleting a Building Block. Then you'll share your thoughts with a classmate.

## Resources required

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Think about how you modified your **Building Blocks**. What steps did you take?
2. Draw a conclusion on how you would delete a **Building Block**.
3. Turn to a classmate and discuss your ideas.

## Try-it: Delete a Building Block



In this standalone try-it activity, you'll practice deleting a **Building Block**.

## Resources

- None

## Instructions

The following are the general tasks that you must perform during this try-it:

- Delete the **Building Block** that you created in the previous lesson.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. You can save your **AutoText** in **Building Blocks** or \_\_\_\_\_.  
*Fill in the blank.*
2. You can save your **Building Blocks** in which of the following galleries?  
*Select all that apply.*
  - a. Watermarks
  - b. Cover Pages
  - c. Styles
  - d. Page numbers

3. You can set your **Quick Parts** to:

*Select all that apply.*

- a. Insert content only
  - b. Insert as its own paragraph
  - c. Insert as its own section
  - d. Insert as its own page
4. When modifying a **Building Block**, the \_\_\_\_\_ will open when you choose the **organize and delete** option.

*Fill in the blank.*

# Lesson 3: Creating a custom document theme

## Overview

In this lesson, you'll learn how to create and use document themes. The activities, discussions, and demonstrations in this lesson give you opportunity to practice the concepts that you learn. You'll participate in teacher- and student-led demonstrations, and then teach a classmate a new skill.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Creating a color set allows you to change the color of which of the following elements?

*Select all that apply.*

- a. Hyperlink
- b. Underline
- c. Accent
- d. Text/background

2. Use the \_\_\_\_\_ tab to set your color sets, font sets, and custom themes.

*Fill in the blank.*

3. Themes can include settings for:

*Select all that apply.*

- a. Colors
- b. Font
- c. Paragraph Spacing
- d. Watermarks

# Topic 1: Create a custom color set



As you learned in the Word associate course, document Themes allow you to apply a set of fonts, paragraph spacing, effects, and color sets. A color set allows you to preset your font color in your theme. If you or your company has font-color preferences for accents and hyperlinks, instead of having to change the colors in each document, you can set your preferred color sets in your theme and save time.

To create your own color set for a theme, perform the following steps:

1. On the **Design** tab, select **Colors**, and then select **Customize Colors**.
2. In the **Create New Theme Colors** window, select the drop-down next to the theme color that you want to change (for example, **Accent 1** or **Hyperlink**), and then pick a color under **Theme Colors**. The following screenshot depicts this:

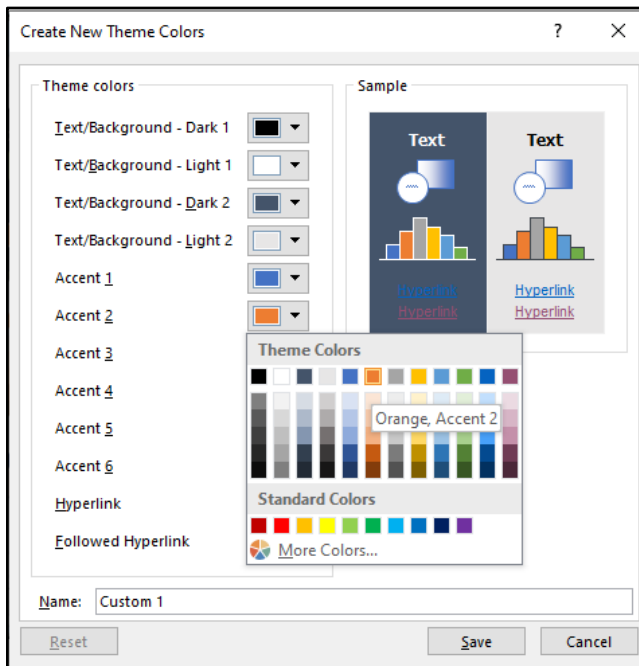
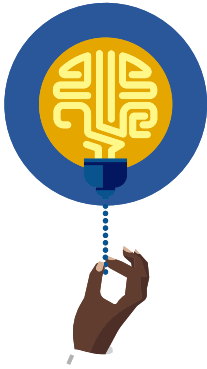


Figure 6: The **Create New Theme Colors** window

3. In the **Sample** pane, preview the changes that you made.
4. Repeat this for all the colors that you want to change.
5. In the **Name** box, enter a name for the new theme colors, and select **Save**.





### Did you know?

To create your own color, select **More Colors**, and then pick a color on the **Standard** tab, or enter numbers or select a color on the **Custom** tab.



### Additional information

For more information on creating custom color themes, go to: [Create my own color theme](#)

---

## Activity: Show and tell

In this activity, you'll observe your teacher demonstrating how to create a custom color set.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrating how to create a custom color set.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Create a custom color set



In this leveled try-it activity, you'll practice creating custom color sets.

## Try-it 1

In this try-it, you'll create a custom color set. To do this, you'll change two accent colors from an existing theme.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Create a custom color set by changing two accent colors in an existing theme.
3. Save and close the document.

## Try-it 2

In this try-it you will create a custom color set with a specific RGB color. To do this, you will change at least two accent colors from an existing theme.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Change at least two colors in an existing theme.
  - One color should be changed to a specific RGB (Red 46, Green 4, Blue 200).
3. Save and close the document.

## Topic 2: Create a custom font set



Most businesses, and many resumes, office communications, and invitations, have font schemes that are used throughout documents. To make this process consistent and easier, you can create a custom font set.

To create a custom font set, perform the following steps:

1. On the **Design** tab, select **Fonts**, and pick the font set that you want. The following screenshot depicts this:

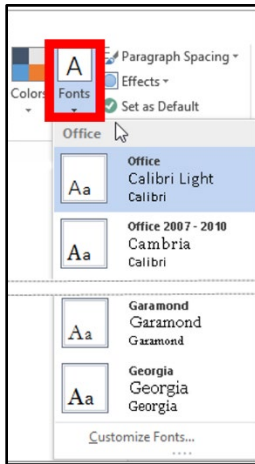


Figure 7: **Font** options

2. To create your own font set, select **Customize Fonts**. The following screenshot depicts the **Create New Theme Fonts** box.

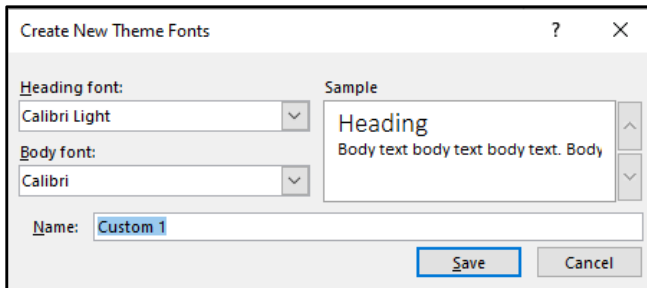


Figure 8: The **Create New Theme Fonts** box

3. Under the **Heading font** and **Body font** boxes, pick the fonts that you want to use.
4. In the **Name** box, enter a name, and select **Save**.



### Additional information

For more information on changing theme fonts, go to: [Change theme fonts](#)

---

## Activity: Pose a challenge

In this activity, you'll think about how you changed color sets and how you can change the font set, and then you'll watch a student demonstration.

## Resources

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Review the steps that you took to change the color sets, and then apply that knowledge to change the font set.
2. Observe a student demonstration on how to change the font set.

## Try-it: Create a custom font set



In this standalone try-it activity, you'll create a custom heading.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Create a custom font by changing the heading font to Segoe UI and body font to Arial.
3. Enter the instructions on customizing the color set and font set.
4. Save and close the document.

# Topic 3: Save design settings as a new theme



So far, you've created color and font sets. You can place them together with additional options to create a custom theme. After you've made changes to your theme, you can save it for reuse. Or you can set it as a default theme for new documents.

To save the changes that you made to the theme, perform the following steps:

1. Make the color and font changes in your document.
2. On the **Design** tab, select **Themes** > **Save Current Theme**. The following screenshot depicts this process.

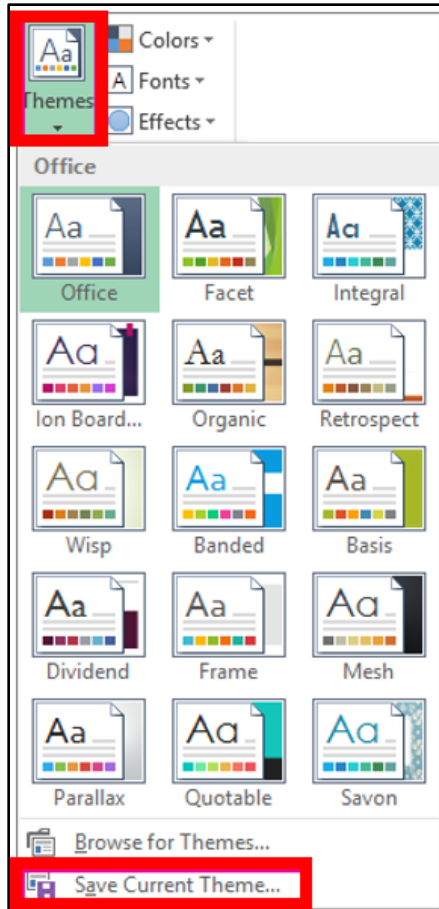
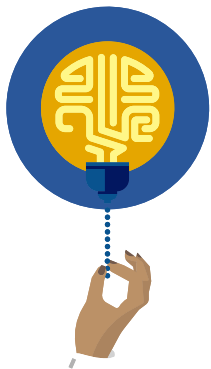


Figure 9: The **Themes** options, with **Save Current Theme** highlighted

3. In the **File name** box, enter a name for the theme, and select **Save Current Theme**.



#### Did you know?

To remove theme formatting from just a portion of your document, select the portion that you want to change, and then change any formatting you like, such as font style, font size, or color.



### Additional information

For more information on changing themes, go to: [Change a theme and make it the default in Word or Excel](#)

---

## Activity: Each one, teach one.

In this activity, you'll reach out to another student and use the **Help** feature to learn how to change a theme. Teach your partner what you've learned.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Partner with a classmate.
2. Use Word **Help** to research how to create a new theme based on color and font sets, and how to save and access the theme.
3. Teach your partner what you've learned.

## Try-it: Save design settings as a new theme



In this try-it activity, you'll create a new theme based on the color and font sets you created.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Select a theme.
3. Apply your new font and color styles.
4. Save the new theme as **try-it**.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. You can use a custom color by setting the \_\_\_\_\_ values.

*Fill in the blank.*

2. When you customize the font, you can set the \_\_\_\_\_ and \_\_\_\_\_ font.

*Fill in the blanks.*

3. You can change \_\_\_\_\_ and \_\_\_\_\_, and then save the new designs as a theme.

*Fill in the blanks.*

# Lesson 4: Creating a custom style set

## Overview

In this lesson, you'll learn how to create and use a custom style set. You'll participate in discussions and step-by-step demonstrations, and you'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Style sets can only be created in the styles \_\_\_\_\_.  
*Fill in the blank.*
2. Using \_\_\_\_\_ in your document is important when you want to add a table of contents.  
*Fill in the blank.*
3. When modifying a style, in the **Formatting** section, you can make any formatting changes you want to:  
*Select all that apply.*
  - a. Font style
  - b. Pagination
  - c. Color
  - d. Indentation



# Topic 1: Update an existing style to match document formatting



You've been working on a document and have formatted the headings and paragraph font. Now you would like to use these attributes in future documents. Because you've already completed the formatting, you can simply modify style in the **Styles** gallery to match your document text.

To update a style to match formatting in a document, you must perform the following steps:

1. Select text in your document that has the style applied, such as Heading 1.

When you select text that has a style applied, that style is highlighted in the **Styles** gallery. The following screenshot depicts this:

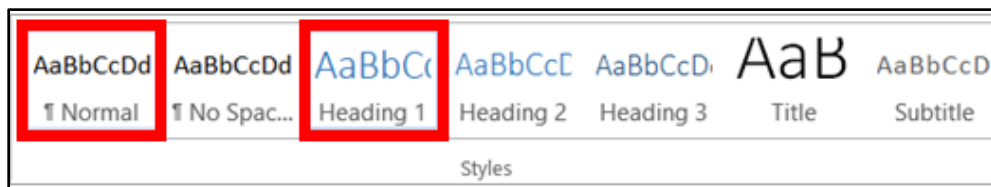


Figure 10: The **Styles** gallery, with **Normal** and **Heading 1** highlighted

2. Format the selected text with the new attributes that you want.
3. On the **Home** tab, in the **Styles** group, right-click or activate the context menu on the style that you want to change, and then select **Update [Style Name] to Match Selection**.

## Activity: Show and tell

In this activity, watch as your teacher demonstrates how to modify a style by updating it to match formatting in your document.

### Resources

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrating how to create a custom color set.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Update an existing style to match document formatting



In this leveled try-it activity, you'll practice modifying existing styles to match actual formatting.

### Try-it 1

In this try-it, you'll update the Heading 1 style to match your document formatting.

#### Resources

- None

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Enter **Heading 1**, and then format it with the font, color, and size that you like.
3. Update the **Heading 1** style to match your formatting.
4. Close the document.

### Try-it 2

In this try-it, you'll update the heading styles to match your document formatting.

#### Resources

- None

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Enter **Heading 1**, and then format it with the font, color, and size that you choose.
3. Update the **Heading 1** style to match your formatting.
4. Enter **Heading 2**, and then format it with the font, color, size, underline style, and text effects.
5. Update **Heading 2** to match your formatting.
6. Enter **Heading 3**, format it with the font, color, size, underline style, and text effects, scale **80%**, and spacing expanded by **1.1 pt**.
7. Update **Heading 3** to match your formatting.
8. Close the document.

## Try-it 3

In this try-it, you'll update the headings and three additional styles to match your document formatting.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Enter **Heading 1**, and then format it with the font, color, and size that you like.
3. Update the **Heading 1** style to match your formatting.
4. Enter **Heading 2**, and then format it with the font, color, size, underline style, and text effects.
5. Update **Heading 2** to match your formatting.
6. Enter **Heading 3**, then format it with the font, color, size, underline style, and text effects, scale **80%**, and spacing expanded by **1.1 pt**.
7. Update **Heading 3** to match your formatting.
8. Select three additional styles to update and format each with a variety of fonts, colors, sizes, underline styles, and text effects, scaling, and spacing.
9. Close the document.

## Topic 2: Modify an existing style manually



Previously, you learned how to update an existing style. You can add more formatting options by modifying the existing style manually.

You can modify a style directly in the **Styles** gallery, without using the text in your document. To modify a style directly in the **Styles** gallery, perform the following steps:

1. On the **Home** tab, right-click or access the context menu on any style in the **Styles** gallery and select **Modify**. The following screenshot depicts this:

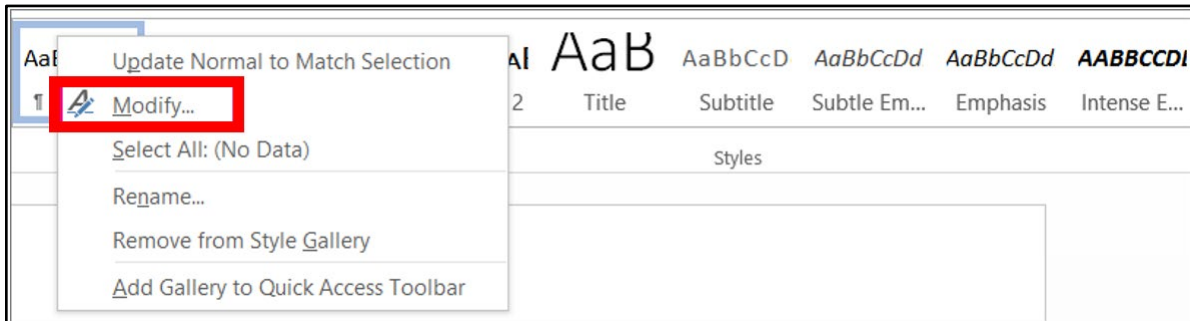


Figure 11: **Modify** option

Alternatively, on the **Home** tab, in the **Styles** group, launch the dialog box, and select **Manage Styles**.

2. In the **Formatting** section, make any formatting changes you want, such as font style, size, or color, alignment, line spacing, or indentation. The following screenshot depicts the **Modify Style** properties:

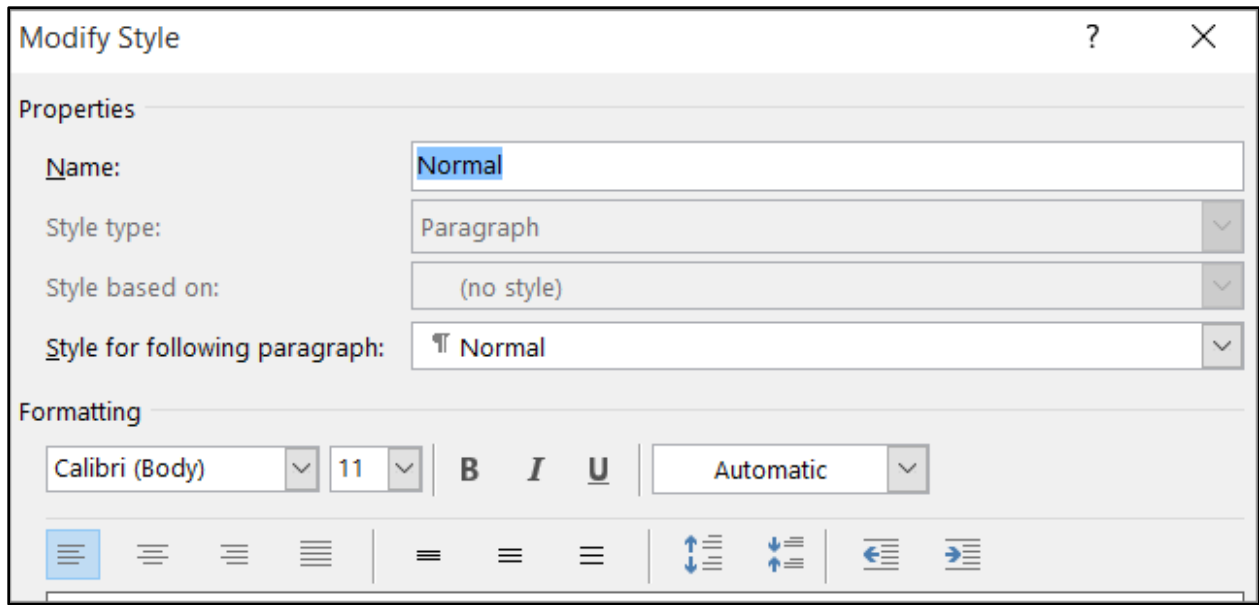


Figure 12: The **Modify Style** properties

3. Choose whether the style change applies to the current document or to all future documents. The following screenshot depicts this:

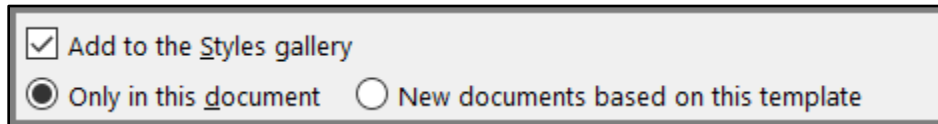


Figure 13: The **Add to the Styles gallery** option

## Activity: Discuss and learn

In this activity, you'll participate in a class discussion about modifying styles.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.

## Try-it: Modify an existing style manually



In this leveled try-it activity, you'll practice modifying existing styles manually.

### Try-it 1

In this try-it, you'll manually modify the Heading 1 style.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Modify the following styles as in the new document based on this template.
  - Heading 1 by changing the font and alignment.
3. Close the document.

### Try-it 2

In this try-it, you'll manually modify the heading styles.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Modify the following styles as in new document based on this template, but don't add them to the **Styles** gallery.
  - **Heading 1** by formatting the paragraph so that the spacing before and after it is **14 pt.**
  - **Heading 2** by changing the font and alignment.
3. Close the document.

### Try-it 3

In this try-it, you'll manually modify the heading styles and three additional styles to match your document formatting.

## Instructions

The following are the general steps that you must perform during this try-it:

1. Open a new blank document.
2. Modify the following styles in a new document based on this template but do not add them to the **Styles** gallery.
  - **Heading 1** by formatting the paragraph so that the spacing before and after it is **14 pt**.
  - **Heading 2** by changing the font and alignment.
3. Modify three additional styles.
  - a. One should include Line and Paragraph breaks.
  - b. One should include font scale, spacing, and position.
  - c. One should include style, color, and border width.
4. Close the document.

## Topic 3: Create a new style set based on document formatting



So far, you've updated an existing style and modified an existing style manually. What if you want to add new styles? You can further customize your formatting options by creating new styles to use in your document.

To create a new style based on document formatting, perform the following steps:

1. Right-click or activate the context menu on the text on which you want to base a new style.
2. In the **Mini Toolbar** that appears, select **Styles**, and then select **Create a Style**. The following screenshot depicts this:

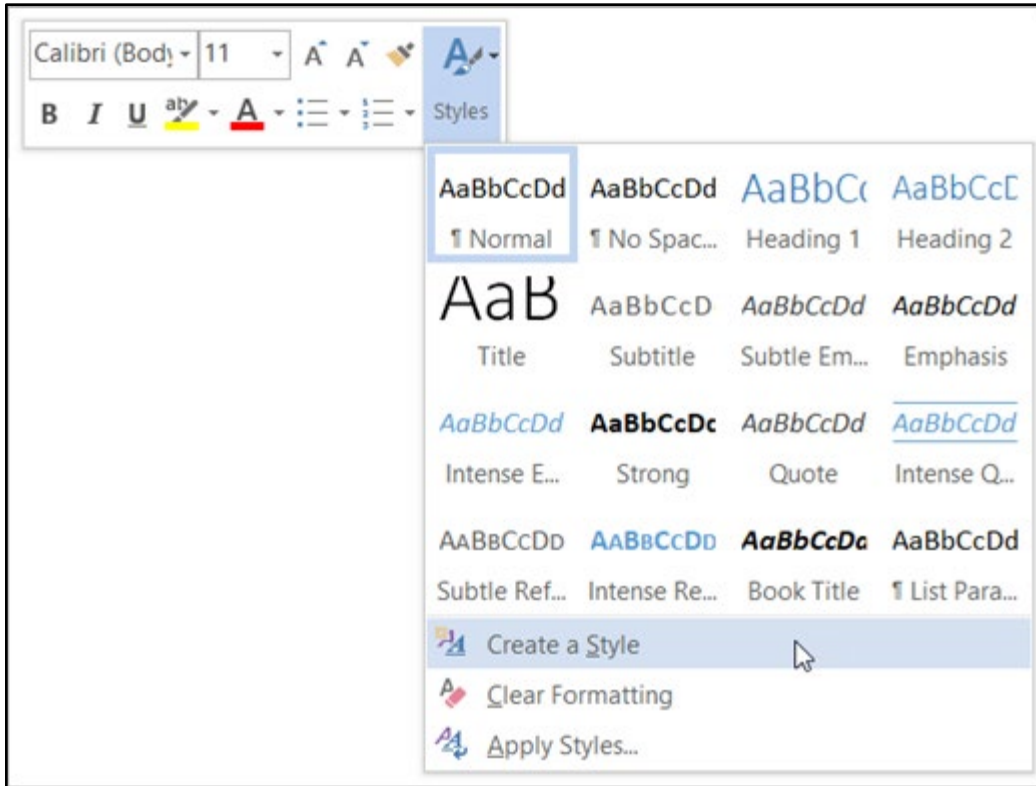


Figure 14: The **Create a Style** option

3. In the **Create New Style from Formatting** dialog box, give your style a name and select **OK**. Your new style will now appear in the **Styles** gallery.

Alternatively, on the **Home** tab, in the **Styles** group, launch the dialog box, and select **Manage Styles, New Style**.

## Activity: Pose a challenge

In this activity, you'll learn how to create a style and explore the differences between templates, themes, and word styles.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Think about the steps you took to update and modify an existing style.
2. Explore and come up with the steps to create your own style.



3. Research [differences among templates, themes, and Word styles](#).
4. Partner with a classmate and share your findings.

## Try-it: Create a new style based on document formatting



In this leveled try-it activity, you'll practice creating new styles.

### Try-it 1

In this try-it, you'll create a new style based on formatted text.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new blank document.
2. Enter a short paragraph about how to create a new style, then format the text font, size, color, and effect.
3. Create a new style based on the formatted text.
4. Close the document.

### Try-it 2

In this try-it, you'll create a document based on your custom template, create a new style based on formatted text, and create formatting for a multilevel list.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new document based on the template that you created in Module 2.
2. Enter a short paragraph about how to modify a style, then apply the paragraph style.
3. Create a new style based on the formatted text.
4. Create a multilevel list and format each level of the list font, size, and color, and add a custom bullet style.
5. Create a new style for each list level based on the formatting text.
6. Close the document.

## Try-it 3

In this try-it, you'll create a document based on your custom template, create a new style based on formatted text, create formatting for a multilevel list, and create three additional styles.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a new, blank document.
2. Apply your custom template.
3. Add a paragraph with any text and apply the paragraph style to it.
4. Create a new style based on the formatting text.
5. Create a multilevel list and format each level of the list.
6. Create a new style for each list level based on the formatting text.
7. Create three additional custom styles.
  - a. One by defining a New Number Format
  - b. One by marking the selected text as a different language
  - c. One by setting the Tab stop position
8. Close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. You can create a style from \_\_\_\_\_ or \_\_\_\_\_.  
*Fill in the blanks.*
2. Default styles include:  
*Select all that apply.*
  - a. Heading 3
  - b. Headers
  - c. Bulleted list
  - d. Normal

# Lesson 5: Applying document settings

## Overview

In this lesson, you'll learn how to apply paste options, configure hyphenation and line numbers, and set paragraph pagination options. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts that you learn.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. \_\_\_\_\_ is used to divide or connect words with a hyphen.

*Fill in the blank.*

2. Line number options include:

*Select all that apply.*

- a. Restart each page
- b. Top of page
- c. Current position
- d. Continuous

3. You can apply paste options:

*Select all that apply.*

- a. From the **Clipboard** group
- b. From the **Insert** tab
- c. Using a keyboard shortcut
- d. By right-clicking or accessing the context menu


# Topic 1: Apply paste options



When working with the same text between documents or applications, you can save time by using the copy and paste options. When you copy text from a Word document, webpage, or other app's document and paste it into a Word document, you can also choose how the text is formatted. You can keep the original formatting, merge with the destination formatting, or just paste the text.

## Change options when pasting content

When you copy content from a formatted source, such as a webpage or another Word document, you can select options at the time that you paste the content into your document. To do that, perform the following steps:

1. Select where you want to paste the content.
2. Select CTRL+V, and then select **Paste Options**. 
3. Hover over the buttons for a live review. The following screenshot depicts this:

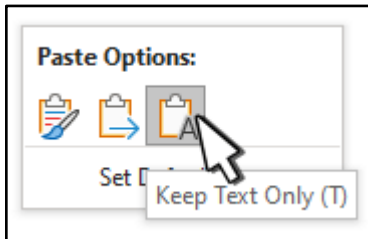


Figure 15: The **Keep Text Only** option

4. Select the paste option to use.

## Set default paste options

By default, Word preserves the original formatting when you paste content into a document by using **CTRL+V**, the **Paste** button, or accessing the context menu and selecting **Paste**. To change the default, perform the following steps:

1. Select **File > Options > Advanced**.
2. Under **Cut, copy, and paste**, select the down arrow for the setting to change.
  - **Pasting within the same document** – When you paste content into the same document from which you copied the content.
  - **Pasting between documents** – When you paste content that was copied from another Word document.

- **Pasting between documents when style definitions conflict** – When you paste content that was copied from another Word document, and the style that is assigned to the copied text is defined differently in the document where the text is being pasted.
- **Pasting from other programs** – When you paste content that was copied from another program, such as a browser.

The following screenshot depicts the **Cut, copy, and paste** options.

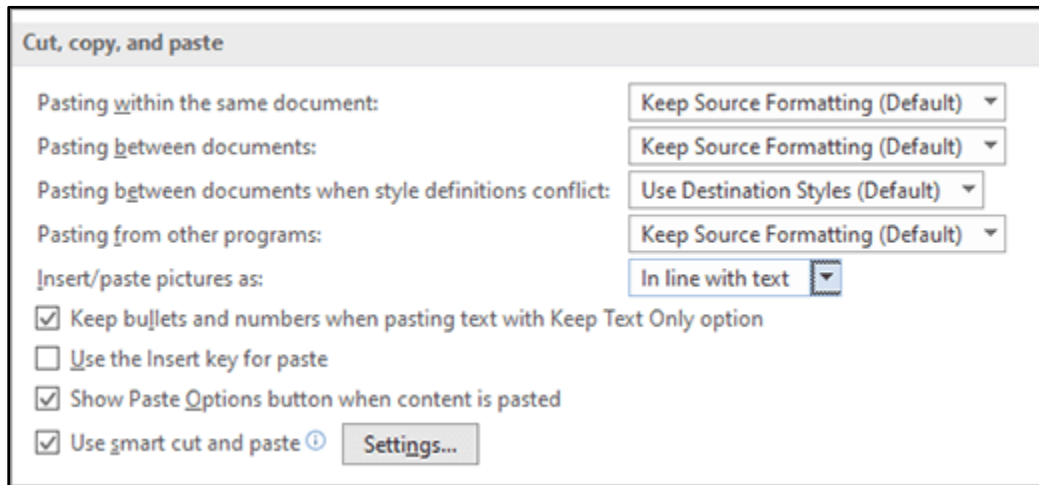
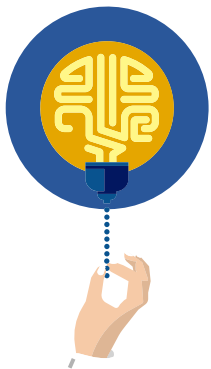


Figure 16: The **Cut, copy, and paste** options

3. Each setting has options you can set, such as:
  - Keep Source Formatting
  - Merge Formatting
  - Keep Text Only
4. Select **OK**.



#### Did you know?

When you paste items from a bulleted or numbered list into another list, you can keep their original formatting or sequence, or blend in with the numbering or bullets of the destination list.



### Additional information

For more information on formatting copied text, go to: [Control the formatting when you paste text](#)

---

## Activity: Each one, teach one

In this activity, you'll learn about changing the paste options, and then teach a classmate.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Partner with a classmate.
2. One partner should research Word **Help** center for instruction on how to set default paste options, and the other should research how to change options when pasting content.
3. Teach your partner what you have learned.

## Try-it: Apply paste options



In this standalone try-it activity, you'll practice using the paste options, and then set default paste options.

## Try-it

In this try-it, you'll copy a paragraph and paste it as a merge formatting, and picture, and text only.

### Resources

You'll need the following resources for this activity:

- Open **L5\_T1\_try\_copy\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open the copy document and a new blank document.
2. Copy the first paragraph from the copy document and paste it into the new document.
3. Copy the second paragraph from the copy document and paste it by merge formatting into the new document.
4. Copy the third paragraph from the copy document and paste it as a picture.
5. Copy the table from the copy document and paste it as text only.
6. Save and close the file.



### Additional information

For more information on controlling the formatting of copied text, go to: [Control the formatting when you paste text](#)

---

## Topic 2: Configure hyphenation and line numbers



When you're working on a document such as a legal document, you often want to display the line numbers and have control over how Word hyphenates your text. Automatic hyphenation is quicker and easier, although manual hyphenation provides more control.

### Insert a nonbreaking hyphen

1. Select where you want to insert a nonbreaking hyphen.
2. Select Ctrl+Shift+Hyphen.

### Hyphenate text automatically

1. On the **Layout** tab, select the arrow next to **Hyphenation**.
2. Select **Automatic**.

## Add line numbers to an entire document

1. On the **Layout** tab, in the **Page Setup** group, select the **arrow** next to **Line Numbers**.

The following screenshot depicts this:

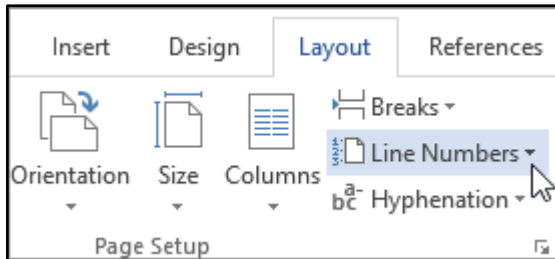


Figure 17: The **Line Numbers** option in **Page Setup**

2. Do one of the following:
  - To number consecutively throughout the document, select **Continuous**.
  - To start with number 1 on each page, select **Restart Each Page**.
  - To start with number 1 after each section break, select **Restart Each Section**.
  - For more advanced line numbering options, such as numbering at different intervals, select **Line Numbering Options**, and then select **Line Numbers** on the **Layout** tab.



### Additional information

For more information on hyphenation, go to: [Control hyphenation](#)

For more information on line numbers, go to: [Add or remove line numbers](#)

## Activity: Discuss and learn

In this activity, you'll learn how to control hyphenation and add and remove line numbers.

### Resources

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.



## Try-it: Configure hyphenation and line numbers



In this leveled try-it activity, you'll practice setting the hyphenation and line number options.

### Try-it 1

In this try-it, you'll set hyphenation to automatic.

#### Resources

You'll need the following resources for this activity:

- Open **L5\_T2\_try1\_newsletter\_draft\_starter.docx** in this lesson's Learning Activity Resources.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Review your hyphenation options.
2. Set your document to hyphenate automatically.
3. Review your line number options.
4. Set continuous line numbers.

### Try-it 2

In this try-it, you'll format the document into two columns, set the alignment, set hyphenation to automatic, and set line numbers to count by 5.

#### Resources

You'll need the following resources for this activity:

- Open **L5\_T2\_try2\_newsletter\_draft\_starter.docx** in this lesson's Learning Activity Resources.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Format the document into two columns.
2. Set the alignment to **Justified**.
3. Review your hyphenation options.
4. Set your document to hyphenate automatically.

5. Review your line number options.
6. Set line numbers to count by 5, and reset each section.

## Try-it 3

In this try-it, you'll format the document into two columns with specific dimensions, set the alignment, set hyphenation to automatic, and set line numbers to count by 5 to reset in each section.

## Resources

You'll need the following resources for this activity:

- Open **L5\_T2\_try3\_newsletter\_draft\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Format the document into two custom columns. Column 1 should be 4" with a space and a line between the columns.
2. Set the alignment to **Justified**.
3. Review your hyphenation options.
4. Set your document to hyphenate automatically.
5. Review your line number options.
6. Set line numbers to count by 5, and reset each section.

# Topic 3: Set paragraph pagination options



As you're working on a document, such as a report, you notice that paragraphs are splitting pages. You never want to add additional hard enters as you enter content. The spacing will change as you edit and format your document. To control your paragraphs from displaying on different pages, use the paragraph pagination options.

## Keep lines of a paragraph together on a page or in a column

1. Select the paragraphs that contain lines that you want to keep together.
2. On the **Home** tab, select the **Paragraph Dialog Box** launcher. The following screenshot depicts this:

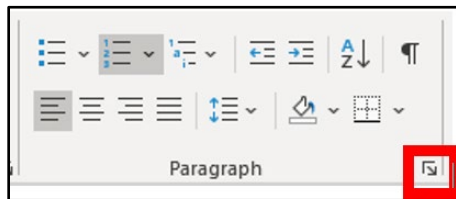


Figure 18: The **Paragraph Dialog Box** launcher

3. Select the **Line and Page Breaks** tab.
4. Under Pagination, select **Keep lines together**.
5. Select **OK**.

## Keep paragraphs together on a page or in a column

1. Select the paragraphs you want to keep together on a page.
2. On the **Home** tab, select the **Paragraph Dialog Box** launcher.
3. Select the **Line and Page Breaks** tab.
4. In the **Pagination** section, select **Keep with next**.
5. Select **OK**.

## Activity: Show and tell

In this activity, watch as your teacher demonstrates how to modify line and page breaks in a document.

## Resources

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrating how to set paragraph pagination.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Set paragraph pagination options



In this standalone try-it activity, you'll keep lines of a paragraph and paragraphs together on a page or in a column.

## Try it

In this try-it, you'll set pagination.

## Resources

You'll need the following resources for this activity:

- Open **L5\_T3\_try\_pagination\_newsletter\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Set the pagination so that Eugenia Austin's profile paragraphs and the paragraph title stay together.
2. Save and close.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. When you want to insert a nonbreaking hyphen select \_\_\_\_\_ + \_\_\_\_\_ + \_\_\_\_\_.

*Fill in the blanks.*

2. You can access the line numbers, hyphenation, and pagination from the \_\_\_\_\_ tab.

*Fill in the blank.*

3. Pagination includes:

*Select the correct option.*

- a. Keep with next
- b. Keep with previous
- c. Page break after
- d. Section break before

# Glossary

The following table defines the key terms used in the module.

<b>AutoText</b>	A common Building Block that stores text and graphics.
<b>AutoText</b>	Reusable content that you can store and access repeatedly.
<b>Building Block</b>	Reusable block of content.
<b>Building Blocks Organizer</b>	Offers a preview of all the Building Blocks available in Word.
<b>Document Property</b>	A list of properties that you can insert in your document.
<b>Field</b>	Automatically updated information.
<b>Hyphenate</b>	To connect (words) or divide (a word, such as a word at the end of a line of print).
<b>Pagination</b>	Used to control how text is displayed on numerous pages.

*Table 2: Glossary terms and definitions*

# Cornerstone

## Overview

In this Cornerstone, you'll finalize the first Munson's Pickles and Preserves Farm CSA Program newsletter. However, you learned that a few changes must be made to the draft document. You'll need to update the styles and theme and then apply paste options, configure hyphenation and line numbers, and set paragraph pagination options for final review before the noon deadline.

## Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

Cornerstone objectives	MOS Exam objective(s)
Apply Paste Options	<ul style="list-style-type: none"> <li>2.1.3: Apply Paste Options</li> </ul>
Configure hyphenation and line numbers	<ul style="list-style-type: none"> <li>2.2.1: Configure hyphenation and line numbers</li> </ul>
Set paragraph pagination options	<ul style="list-style-type: none"> <li>2.2.2: Set paragraph pagination options</li> </ul>
Create Quick Parts	<ul style="list-style-type: none"> <li>3.1.1: Create Quick Parts</li> </ul>
Manage building blocks	<ul style="list-style-type: none"> <li>3.1.2: Manage building blocks</li> </ul>
Create custom color sets	<ul style="list-style-type: none"> <li>3.2.1: Create custom color sets</li> </ul>
Create custom font sets	<ul style="list-style-type: none"> <li>3.2.2: Create custom font sets</li> </ul>
Create custom themes	<ul style="list-style-type: none"> <li>3.2.3: Create custom themes</li> </ul>
Create custom style sets	<ul style="list-style-type: none"> <li>3.2.4: Create custom style sets</li> </ul>

*Table 3: Cornerstone objectives and corresponding MOS exam objectives*

## Duration

50 minutes

# Instructions

1. Complete the tasks for each file.
2. When saving your file, add your name to the end of the filename, for example: **Company\_Espino**. Follow your teacher's directions for where to save your files.
3. When you're done with the Cornerstone, assess your completion and enter the points that you think you earned within the task lists below. You can ask your teacher for help if required.

## Tasks

You'll work with one file in this Cornerstone. The following are the tasks that you must complete within this file.

### File: Cornerstone\_newsletter\_starter.docx

#### Task: Apply Paste options (1 point)

1. Open the document.
2. Select all text and copy it.
3. Open a new blank document and paste by keeping only the text. (1 point) (Exam objective 2.1.3)

Points scored: \_\_\_\_\_ / 1

#### Task: Configure hyphenation and line numbers (7 points)

1. Set Hyphenation to (3 points) (Exam objective 2.2.1)
  - Automatically Hyphenate
  - Hyphenated word in CAPS
  - Limit consecutive hyphenation to 3
2. Set Line Number options (4 points) (Exam objective 2.2.1)
  - Start at 1
  - .5 away from text
  - Count by 4
  - Continuous

Points scored: \_\_\_\_\_ / 7



### Task: Set paragraph pagination options (1 point)

- Set all paragraph headings to stay with next. (1 point) (Exam objective 2.2.2)

Points scored: \_\_\_\_\_ / 1

### Task: Create Quick Parts (3 points)

1. Create **AutoText** for **Munson's Pickles and Preserves featured staff**. (1 point) (Exam objective 3.1.1)
2. Create a **Quick Part** for the first paragraph. (1 point) (Exam objective 3.1.1)
3. Insert the document property publication date. (1 point) (Exam objective 3.1.1)

Points scored: \_\_\_\_\_ / 3

### Task: Manage Building Blocks (2 points)

- Delete the **AutoText** for **Munson's Pickles and Preserves featured staff**. (2 points) (Exam objective 3.1.2)

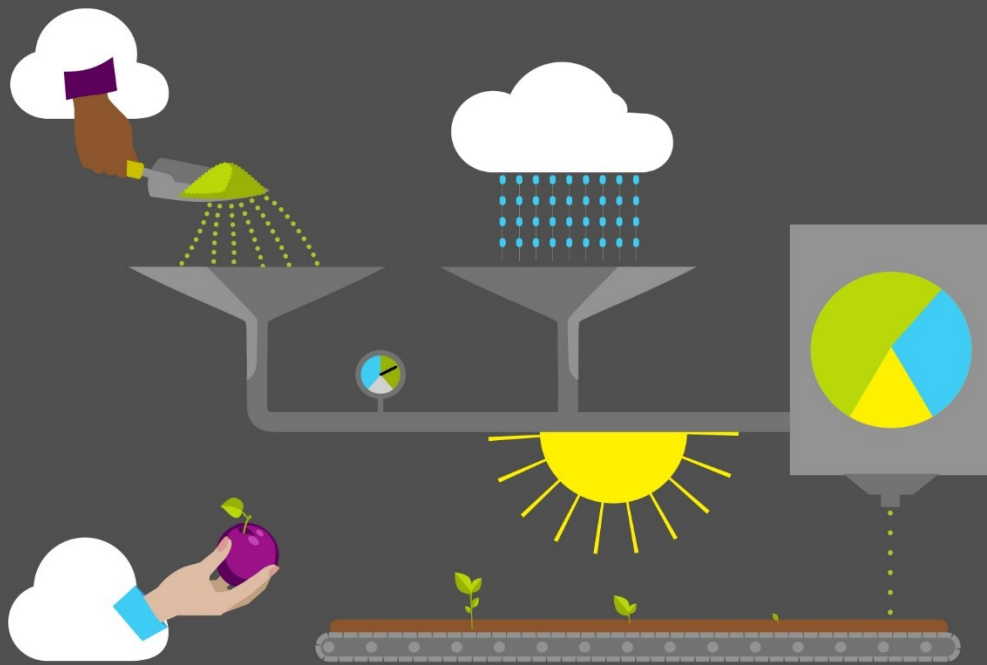
Points scored: \_\_\_\_\_ / 2

### Task: Custom formatting (5 points)

1. Create a custom color set based on the default **Yellow** set. Change at least three-color settings and name it **Cornerstone**, and then apply. (1 point) (Exam objective 3.2.1)
2. Create a custom font set and name it **Cornerstone**, and then apply. (1 point) (Exam objective 3.2.2)
3. Format **Munson's Newsletter**, then save it as the **Heading 1** style. (1 point) (Exam objective 3.2.4)
4. Format **Marcos Serna: Farm General Manager**, save it as **Heading 2** and then apply the **Heading 2** style to **Hackathon** and all the featured staff's names. (1 point) (Exam objective 3.2.4)
5. Save the new current theme with the name **Cornerstone** in the **File Name** box of the **Save Current Theme** dialog box. (1 point) (Exam objective 3.2.3)

Points scored: \_\_\_\_\_ /5

FILE 1 TOTAL POINTS: \_\_\_\_\_ /19



# Student Guide

40570A

Microsoft Word expert 2019

Module 4: Creating reference tables and restricting editing

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# Module overview

## Description

This module consists of five lessons that will help you learn how to use some of the advanced features of Microsoft Word 2019. By the end of this module, you'll be able to create and manage indexes, insert and configure table and caption properties, use **Find** and **Replace**, and help protect documents by limiting formatting and using passwords.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objectives
Creating and updating indexes	Mark index entries and cross reference entries and then create and update an index from the entries	<ul style="list-style-type: none"> <li>• 3.3.1</li> <li>• 3.3.2</li> <li>• 3.3.3</li> </ul>
Creating a Table of Figures	Insert and configure captions and then create a Table of Figures	<ul style="list-style-type: none"> <li>• 3.4.1</li> <li>• 3.4.2</li> <li>• 3.4.3</li> </ul>
Restricting document editing	Apply formatting restrictions to a document	<ul style="list-style-type: none"> <li>• 1.2.1</li> <li>• 1.2.2</li> </ul>
Using Find and Replace	Use Find and Replace to locate text using wildcards, characters, and formatting	<ul style="list-style-type: none"> <li>• 2.1.1</li> <li>• 2.1.2</li> </ul>

Lesson	Learning objective	Exam objectives
Cornerstone: Finalizing a document for a state grant	Create reference tables for quickly locating objects in the document	<ul style="list-style-type: none"> <li>• 1.2.1</li> <li>• 1.2.2</li> <li>• 2.1.1</li> <li>• 2.1.2</li> <li>• 3.3.1</li> <li>• 3.3.2</li> <li>• 3.3.3</li> <li>• 3.4.1</li> <li>• 3.4.2</li> <li>• 3.4.3</li> </ul>

*Table 1: Objectives by lesson*

## Scenario

Munson's Pickles and Preserves Farm wants to apply for a state grant to expand their community supported agriculture (CSA) program. They've asked you to complete the documentation needed for the proposal. You'll therefore prepare a draft document to help finalize the proposal.

## Cornerstone

In the Cornerstone, you'll create a proposal document for a state grant that will include reference tables—so that readers will be able to easily find photographs, objects, and other details of the proposal. After you finalize the document, you'll restrict editing by applying a password to that document.

# Lesson 1: Creating and updating indexes

## Overview

In this lesson, you'll learn how to create, mark, and update indexes. You'll participate in step-by-step demonstrations, peer partnerships, and problem-solving, and you'll have opportunities to put what you learn into practice.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which tab do you use to mark entries?

*Select the correct option.*

- a. **Home** tab
- b. **Insert** tab
- c. **References** tab
- d. **Review** tab

2. A list of the terms and topics that a document discusses is called:

*Select the correct option.*

- a. Table of Contents
- b. Index
- c. Entries
- d. Glossary

3. If Word doesn't display the **XE** fields, select:

*Select the correct option.*

- a. **References**
- b. **Show/Hide**
- c. **Group**
- d. **Update**

# Topic 1: Mark index entries



An *index* lists the terms and topics that a document discusses along with the pages on which they appear. This helps people when they're trying to find specific information in a long document. This topic will thus help you begin marking text to link to the index. To do so:

1. Select the text you want to use as an index entry, or just select the location where you want to insert an entry.
2. On the **References** tab, in the **Index** group, select **Mark Entry**, as the following screenshot depicts.



Figure 1: The **Mark Entry** command

3. Note that you can edit the text in the **Mark Index Entry** dialog box, as the following screenshot depicts.

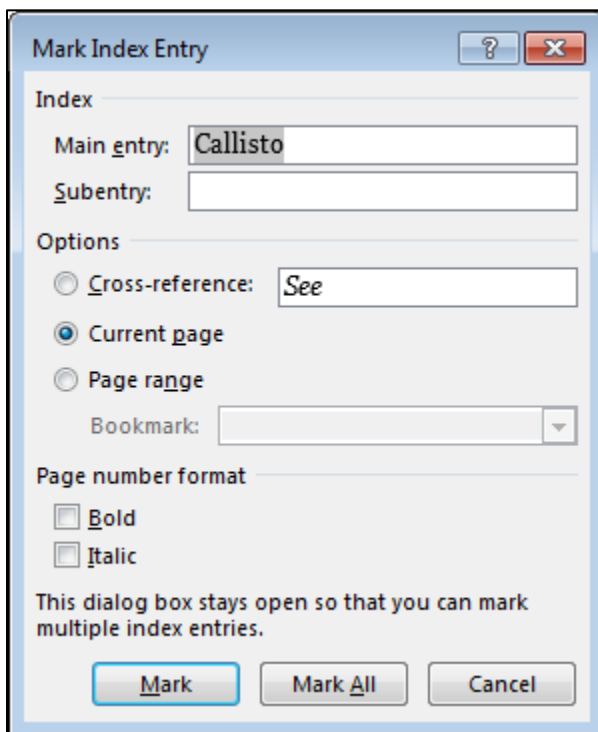


Figure 2: The **Mark Index Entry** dialog box



4. Note that you can add a second level of text in the **Subentry** box. If you need a third level, follow the subentry text with a colon and the third-level text.
5. If you want to create a cross-reference to another entry, select **Cross-reference** in the **Options** area, and then in the **Cross-reference** box, enter the text for the other entry.
6. If you want to format the page numbers that the index will display, select the **Bold** check box, the **Italic** check box, or both in the **Page number format** area.
7. To mark the index entry, select **Mark**. To mark this text everywhere it appears in the document, select **Mark All**.
8. To mark more index entries, select the text in the document, and then repeat steps 3 through 7.



### Additional information

To review additional information about marking index entries, refer to: [Create and update an index](#)

---

## Activity: Show and tell

In this activity, you'll follow a step-by-step demonstration on how to mark index entries in a document.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrate how to mark index entries in a document.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Mark index entries



In this leveled try-it, you'll mark entries in an existing document.

### Try-it 1

In this try-it, you'll mark entries in a document.

## Resources

You'll need the following resource for this try-it:

- **L1\_T1\_try1\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Mark an index entry for the first instance of each of the following words: **grant**, **proposals**, and **requirements**.
2. Hide the paragraph marks.
3. Save the document and keep it open for the next topic.

## Try-it 2

In this try-it, you'll mark entries in general and mark an entry to cross-reference another one in a document.

## Resources

You'll need the following resource for this try-it:

- **L1\_T1\_try2\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Mark all instances of **grant** as an index entry.
2. Mark all instances of **funding** as an index entry.
3. Mark the first instance of **funding** to cross-reference the **funders** entry.
4. Hide the paragraph marks.
5. Save the document and keep it open for the next topic.

## Topic 2: Create an index



Now that you've marked the entries, you're ready to insert the index into your document. Word collects the index entries, sorts them alphabetically, references their page numbers, removes duplicate entries from the same page, and displays the index in the document. To insert an index:

1. Select the location where you want to add the index.
2. On the **References** tab, in the **Index** group, select **Insert Index**, as the following screenshot depicts.



Figure 3: The **Insert Index** command

3. Note that in the **Index** dialog box, you can choose the formatting for text entries, page numbers, tabs, and leader characters, as the following screenshot depicts.

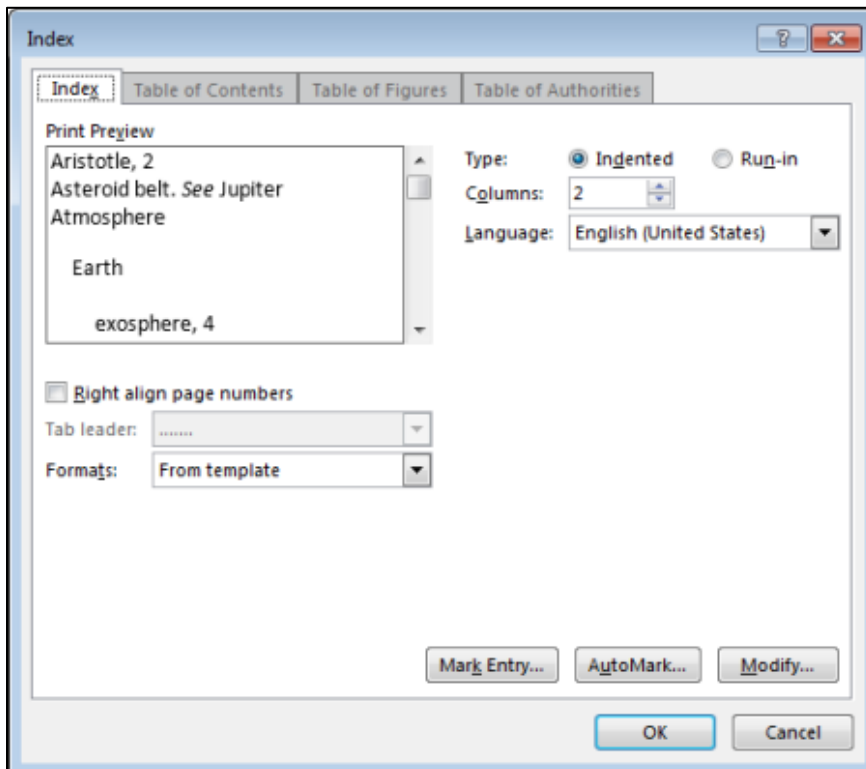


Figure 4: The **Index** dialog box

4. Note that you can change the overall formatting of the index by selecting an entry in the **Formats** list. A preview will then display in the **Print Preview** box.
5. Select **OK**.



### Additional information

To review additional information about creating an index, refer to:  
[Create and update an index](#)

---

## Activity: Each one, teach one

In this activity, you'll use **Help** files to learn how to create an index and then share your findings with a classmate.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Use the help in Word to search for information about how to create an index.
2. Discuss the steps for creating an index with a classmate.

## Try-it: Create an index



In this standalone try-it, you'll create an index from existing marked entries.

### Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L1\_T2\_try\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Insert a new page titled **Index** at the end of the document.
2. Create a **Modern**, one-column index.
3. Save the document and keep it open for the next topic.

## Topic 3: Update an index



If you mark more entries after creating your index, you'll need to update the index to display them. To update an index:

1. If Word isn't displaying the **XE** fields, on the **Home** tab, in the **Paragraph** group, select **Show/Hide**.
2. Find the **XE** field for the entry you want to change.
3. To edit or format the index entry, change the text inside the quotation marks.
4. To update the index, select the index, and then select the F9 key. Alternatively, on the **References** tab, in the **Index** group, select **Update Index**, as the following screenshot depicts.

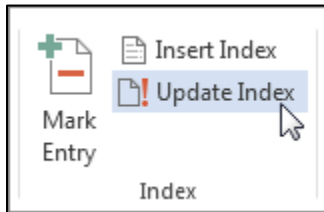


Figure 5: The **Update Index** command

If you find an error in the index, find the index entry you want to change, change it, and then update the index.

### Delete an index entry and then update the index

1. If Word isn't displaying the **XE** fields, on the **Home** tab, in the **Paragraph** group, select **Show/Hide**.
2. Select the entire index entry field, including the braces (**{}**), and then select the Del key.
3. To update the index, select the index, and then select F9. Or, on the **References** tab, in the **Index** group, select **Update Index**.



#### Additional information

To review additional information about updating an index, refer to: [Create and update an index](#)

## Activity: Pose a challenge

In this activity, you'll brainstorm to predict how to update an index and then discuss your ideas with the class.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Think of the steps for marking entries and creating an index.
2. Predict how to mark more entries and then update the index.
3. Participate in the discussion with your classmates.

## Try-it: Update an index



In this standalone try-it activity, you'll mark more entries for an index, delete an entry, update the index, and then verify the updates.

### Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L1\_T3\_try\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Mark an entry for the word **requirements** in the title of the fifth paragraph, which begins with **Grant eligibility**.
2. Delete the **funders** cross-reference for the word **funding** in the first line of the first paragraph, which begins with **Grants provide non-repayable**.
3. Save and close the document.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. Use \_\_\_\_\_ to refer to another entry.

*Fill in the blank space.*

2. **Mark Index Entries** options include:

*Select all that apply.*

- a. **Current page**
- b. **Page range**
- c. **Page numbers**
- d. **Cross-reference**

3. To update an index field, select either **Update Index** or:

*Select the correct option.*

- a. **F4**
- b. **CTRL+I**
- c. **F9**
- d. **CTRL+U**

# Lesson 2: Creating a Table of Figures

## Overview

In this lesson, you'll learn how to insert figure and table captions, configure caption properties, and insert and modify a Table of Figures. You'll participate in discussions, follow step-by-step demonstrations, and explore where to find additional options and tools.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. To label pictures or objects, select:  
*Select the correct option.*
  - a. **Insert Index**
  - b. **Insert Footnote**
  - c. **Insert Caption**
  - d. **Insert Footnote**
2. To create of list only of labeled pictures or objects, insert:  
*Select the correct option.*
  - a. Table of Contents
  - b. Endnotes
  - c. Index
  - d. Table of Figures



3. Examples of preset label options include:

*Select all that apply*

- a. **Picture**
- b. **Figure**
- c. **Table**
- d. **Chart**

## Topic 1: Insert figure and table captions



You can add captions to figures, equations, and other objects. A *caption* is a numbered label, such as **Figure 1**, that you add to a figure, table, equation, or other object. It's made up of customizable text (**Figure**, **Table**, **Equation**, or something else that you enter), followed by an ordered number or letter (typically, **1**, **2**, **3**, ... or **a**, **b**, **c** ...), and then optionally followed by additional descriptive text. To add a caption to an object:

1. Select the object (table, equation, figure, or other object) that you want to add a caption to.
2. On the **References** tab, in the **Captions** group, select **Insert Caption**, as the following screenshot depicts.

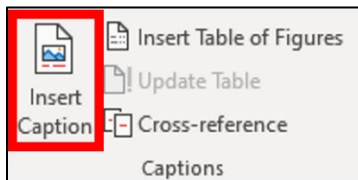


Figure 6: The **Insert Caption** command

3. In the **Caption** dialog box, in the **Label** list, select the label that best describes the object, such **Figure** or **Equation**. If the list doesn't have the label you want, select **New Label**, enter the new label in the **Label** box, and then select **OK**.

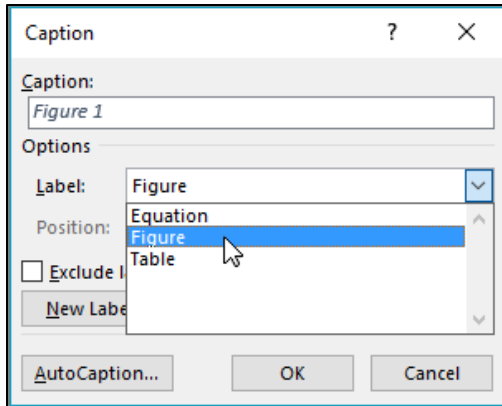


Figure 7: The **Caption** dialog box

4. In the **Caption** box, enter any text, including punctuation, that you want to appear after the label, as the following screenshot depicts.

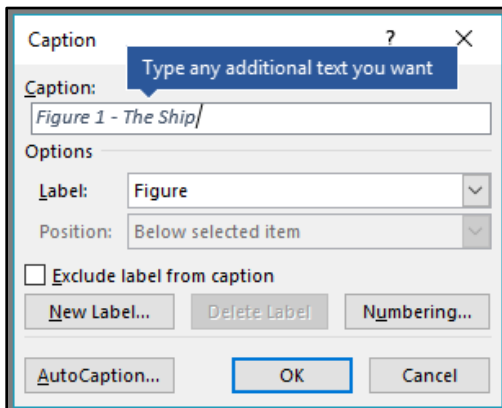


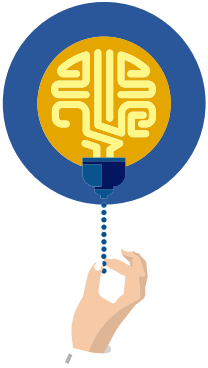
Figure 8: Custom caption text

5. Select **OK**.



### Additional information

To review the article on adding captions, refer to: [Add, format, or delete captions in Word](#)



### Did you know?

Word inserts a sequential caption number as a field. If your caption displays like **Figure {SEQ Table \\* ARABIC}**, Word is displaying field codes instead of field results. To display the caption normally, select ALT+F9.

## Activity: One step back, two forwards

In this activity, you'll think about how you marked entries and inserted an index. Using your prior knowledge, you'll then determine the steps to insert a caption.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. With your partner, discuss how you marked entries and inserted an index.
2. Using this knowledge, explore the **References** tab to determine the steps to insert a caption.
3. Share your ideas with the class.

## Try-it: Insert figure and table captions



In this standalone try-it activity, you'll insert captions for graphics and tables.

### Resources

You'll need the following resource for this try-it:

- Your document from Lesson 1 or **L2\_T1\_try\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Insert a caption for the picture of the tracker located under the paragraph ending in **easy to track**.
2. Insert a caption for the **Income and funding** and **Expenses** tables.
3. Save the document and keep it open for the next topic.

## Topic 2: Configure caption properties and create new labels



After you've inserted your captions, you can customize their properties by changing the label options, creating a new label, and customizing the numbering formatting. The **Caption** dialog box gives you the assorted options.

### Select a label option

- In the **Caption** dialog box, in the **Label** list, select **Equation**, **Figure**, or **Table**, as the following screenshot depicts.

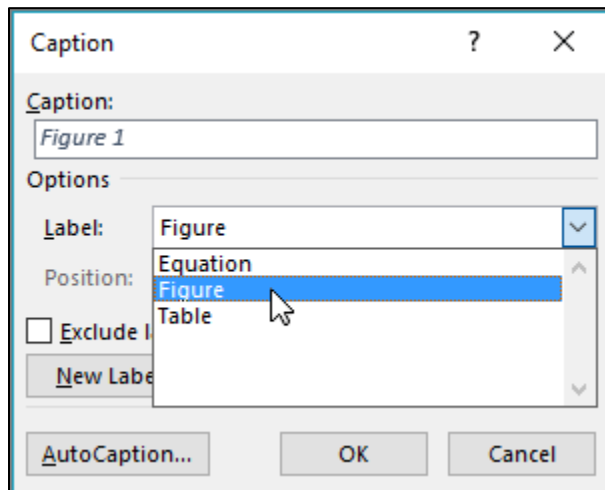


Figure 9: The **Figure** label

## Select a position option

- In the **Caption** dialog box, in the **Position** list, select **Above selected item** or **Below selected item**, as the following screenshot depicts.

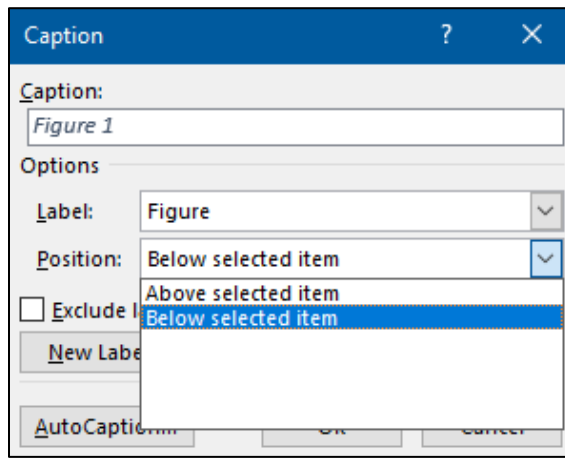


Figure 10: The caption label position

## Create a new label

- In the **Caption** dialog box, select **New Label**, and then enter a custom label name.

## Customize the numbering

- In the **Caption** dialog box, select **Numbering**.
- In the **Format** list, select the numbering style you want.
- Note that you can choose to include chapter numbers with your captions.
- Select **OK**, as the following screenshot depicts.

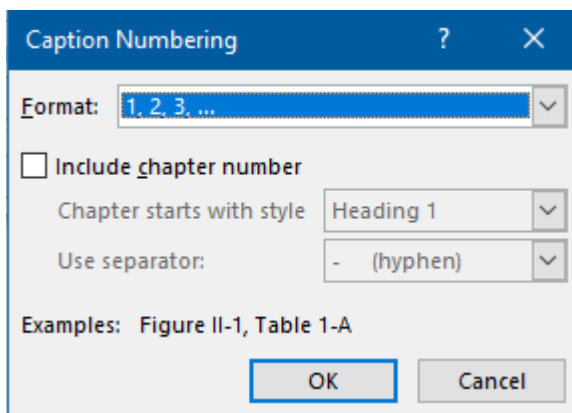
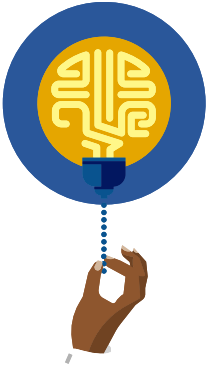


Figure 11: The **Caption Numbering** dialog box

- To delete the caption, select the caption, and then select **Delete**.



### Did you know?

After you add at least one caption to your document, the style gallery displays a new style named **Caption**.

## Activity: Pose a challenge

In this activity, you'll participate in a discussion about configuring caption properties. A volunteer will then demonstrate how to create a new label, move the label location, and modify the label number formats.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the teacher-led discussion about configuring caption properties.
2. Observe the demonstration on how to create a new label, move the label location, and modify the label number formats.
3. Ask clarifying questions.

## Try-it: Configure caption properties and create new labels



In this leveled try-it, you'll customize label properties.

### Try-it 1

In this try-it, you'll insert a caption and update all the figure numbers.

### Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L2\_T2\_try1\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Insert a caption above the **Income** chart.
2. Update all the figure numbers.
3. Save the document and keep it open.

## Try-it 2

In this try-it, you'll insert captions and configure the caption properties.

## Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L2\_T2\_try2\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Delete all the captions.
2. Use the **A, B, C** numbering format for all new captions.
3. Insert a figure caption for the first image of a tractor.
4. Insert a new label named **Chart**, and then add a caption above the **Income** chart.
5. Insert a table caption for each of the tables.
6. Save the document and keep it open.

# Topic 3: Insert and modify a Table of Figures



You can list and organize the figures, pictures, or tables in your Word document by creating a Table of Figures, which is much like a table of contents. First add captions to your figures, and then on the **References** tab, select **Insert Table of Figures**. Word then searches the document for your captions and automatically adds a list of figures, sorted by page number.

## Insert a Table of Figures

1. Place your cursor in the document where you want to insert a Table of Figures.
2. On the **References** tab, select **Insert Table of Figures**, as the following screenshot depicts.

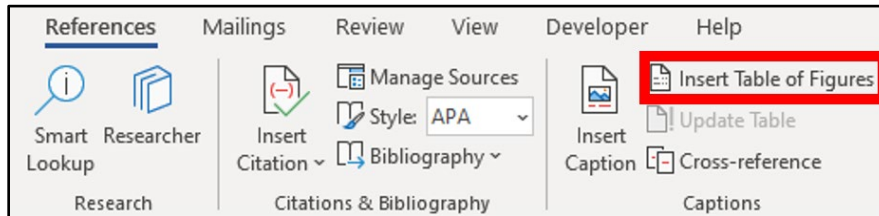


Figure 12: The **Insert Table of Figures** command

3. In the **Table of Figures** dialog box, adjust the formatting and options if you want, and then select **OK**.

## Update a Table of Figures

If you add, delete, change, or move captions, select **Update Table** so the Table of Figures will reflect your changes:

1. In your document, select anywhere in the Table of Figures. Word highlights the entire table.
2. On the **References** tab, select **Update Table** as the following screenshot depicts.

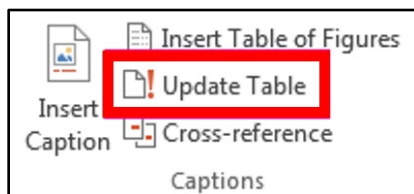


Figure 13: The **Update Table** command

3. In the **Update Table of Figures** dialog box, select an update option:
  - If you need to adjust only the page numbers, select **Update page numbers only**.
  - If you moved figures or changed captions, select **Update entire table**.
4. Select **OK**.



### Additional information

To review additional information, refer to: [Insert a Table of Figures](#)



## Activity: Research and learn

In this activity, you'll research how to insert and update a Table of Figures, and then you'll create a step-by-step user guide.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Research how to insert and update a Table of Figures.
2. Create a step-by-step user guide in Word or Microsoft PowerPoint.

## Try-it: Insert and modify a Table of Figures



In this leveled try-it, you'll insert a Table of Figures.

### Try-it 1

In this try-it, you'll insert a Table of Figures for figures, charts, and tables.

### Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L2\_T3\_try1\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. On a new page following the index, insert a **Table of Figures** for the figures, charts, and tables in the document.
2. Save and close the document.

### Try-it 2

In this try-it, you'll insert and format a Table of Figures for figures, charts, and tables.

## Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L2\_T3\_try2\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. On a new page following the index, insert one **Table of Figures** with the **Classic** format that includes all the figures, charts, and tables in the document and that has an en dash followed by a space (– ) as the leader.
2. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. The formatting options for caption numbering include:

*Select the correct option.*

- a. **1 2 3**
  - b. **A) B) C)**
  - c. **a b c**
  - d. **I. II. III.**
2. When creating a Table of Figures for the web, you can use \_\_\_\_\_ instead of page numbers.

*Fill in the blank space.*

3. Word uses a hyperlink for a \_\_\_\_\_, whereas it automatically generates a label.

*Select the correct option.*

- a. Caption
- b. AutoCaption
- c. Cross-reference
- d. Table of Figures

# Lesson 3: Restricting document editing

## Overview

In this lesson, you'll learn the options for restricting document editing and how to apply the restrictions by means of a password. You'll participate in discussions, step-by-step demonstrations, and collaborative learning, and you'll have opportunities to put what you learn into practice.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Which of the following helps protect a document from editing but allows comments?

*Select the correct option.*

- a. Formatting restrictions
- b. Protection from using comments
- c. Comments being turned off
- d. Editing restrictions

2. \_\_\_\_\_ helps prevent accidental editing changes by asking readers to opt in to editing.

*Fill in the blank space.*

3. You can restrict editing from the \_\_\_\_\_ or the \_\_\_\_\_ tab.

*Fill in the blank spaces.*

## Topic 1: Limit formatting



When sharing a document or working collaboratively, you might want to limit what others will be able to do within the document. By protecting your document and restricting editing, you help ensure that other users will be able to change only the areas of the document you choose.

## Restrict styles and themes

1. On the **Review** tab, in the **Protect** group, select **Restrict Editing**.
2. In the **1. Formatting restrictions** area, select **Settings**.
3. In the **Formatting Restrictions** dialog box, in the **Styles** area, select the **Limit formatting to a selection of styles** check box, as the following screenshot depicts.

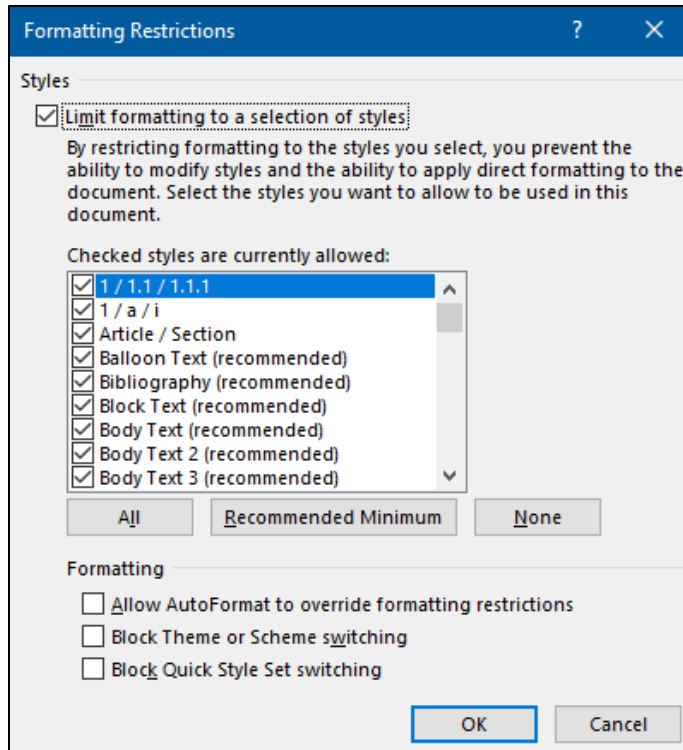


Figure 14: The **Formatting Restrictions** dialog box

4. Choose the styles to restrict by clearing the check box for each style you want to restrict.
5. In the **Formatting** area, select any of the check boxes that apply:
  - **Allow AutoFormat to override formatting restrictions**
  - **Block Theme or Scheme switching**
  - **Block Quick Style Set switching**

## Restrict editing

To help protect a document by marking the parts that others will be able to change:

1. On the **Review** tab, in the **Protect** group, select **Restrict Editing**, as the following screenshot depicts.

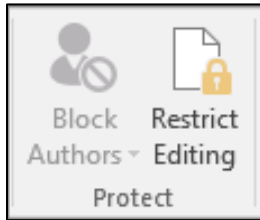


Figure 15: The **Restrict Editing** command

2. In the **2. Editing restrictions** area, select the **Allow only this type of editing in the document** check box.
  3. In the list of editing restrictions, select **No changes (Read only)**.
  4. Select the part of the document where you want to allow changes.
  5. In the **Exceptions (optional)** area, do one of the following:
    - a. To allow anyone who opens the document to edit the part you selected, select the **Everyone** check box in the **Groups** list.
    - b. To allow only particular individuals to edit the part you selected, select **More users**, and then enter the usernames. Include your name if you want to be able to edit that part of the document. Separate each name from the next name with a semicolon.
- Important:** If you intend to help protect the document via user authentication rather than passwords, make sure to enter email addresses for the usernames.
6. Select **OK**, and then select the check boxes for the names of the individuals you're allowing to edit the part you selected.
  7. Continue to select parts of the document and assign users permission to edit them.
  8. In the **3. Start enforcement** area, select **Yes, Start Enforcing Protection**.
  9. Do one of the following:
    - To assign a password to the document so that users who know the password can remove the protection and work on the document, enter a password in the **Enter new password (optional)** box, and then confirm the password.
    - To encrypt the document so that only authenticated owners of the document can remove the protection, select **User authentication**.



### Additional information

To review additional information about helping protect a document, refer to: [Allow changes to parts of a protected document](#)

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## Activity: Discuss and learn

In this activity, you'll participate in the teacher-led discussion and then observe the teacher demonstrate how to restrict editing.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the class discussion.
2. Observe the teacher's demonstration.
3. Ask clarifying questions.

## Try-it: Limit formatting



In this leveled try-it, you'll apply editing and formatting restrictions to a document.

### Try-it 1

In this try-it, you'll restrict editing to no changes (read-only) via a password.

### Resources

You'll need the following resource for this try-it:

- The document from the previous lesson or **L3\_T1\_try1\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Apply read-only document editing protection, and enter **password** as the password.
2. Save the document and keep it open.

## Try-it 2

In this try-it, you'll restrict the theme and specific styles of a document via a password.

### Resources

You'll need the following resource for this try-it:

- The document from the previous lesson or **L3\_T1\_try2\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Restrict the theme and specific styles of the document.
2. Apply read-only document editing protection, and enter **password** as the password.
3. Save the document and keep it open.

## Topic 2: Help protect documents by using passwords



Just like you can restrict a document from editing and formatting changes, you can also help protect the entire document. To choose a document protection option:

1. On the **File** tab, select **Info**.
2. Select **Protect Document**, and then select one of the following commands, as the following screenshot depicts.

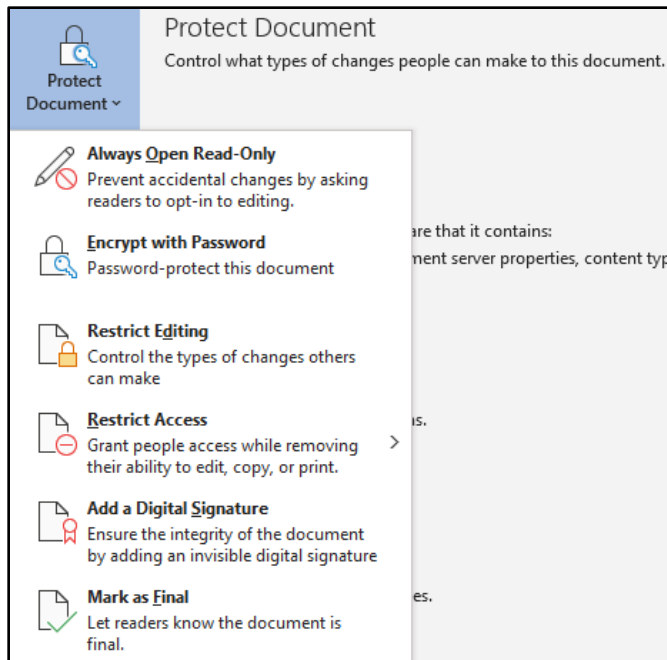


Figure 16: The **Protect Document** commands

- **Always Open Read-Only.** Help prevent accidental changes by asking readers to opt in to editing.
- **Encrypt with Password.** Help protect this document via a password.
- **Restrict Editing.** Control the types of changes others can make.
- **Restrict Access.** Grant people access while removing their ability to edit, copy, or print this document.
- **Add a Digital Signature.** Help ensure the integrity of the document by adding an invisible digital signature.
- **Mark as Final.** Let readers know that the document is final.



### Additional information

To review additional information, refer to: [Protect a document with a password](#)

## Activity: Four corners

In this activity, you'll explore helping to protect a document and learn about the options for doing so.

### Resources required

None



## Activity instructions

Participate in the activity by following these instructions:

1. Choose one of the **corners: Always Open Read-Only, Encrypt with Password, Restrict Editing, or Mark as Final.**
2. Research and practice this **Protect Document** command.
3. Choose one or more representatives to teach the rest of the class about your command.

## Try-it: Help protect documents by using passwords



In this standalone try-it activity, you'll mark a document as final.

## Resources

You'll need the following resource for this try-it:

- The document from the previous topic or **L3\_T2\_try\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Encrypt the document using a password.
2. Mark the document as final.
3. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. To allow people to use only specific styles in a document:

*Indicate the correct sequence by adding the numbers 1–5 next to the following items.*

- a. Select **Settings**. \_\_\_\_\_
- b. Go to the **Review** tab. \_\_\_\_\_
- c. Select **Restrict Editing**. \_\_\_\_\_
- d. Select **Protect**. \_\_\_\_\_
- e. In the **1. Formatting restrictions** area ... \_\_\_\_\_

2. Word makes the following options available when editing is restricted.

*Select all that apply.*

- a. **Comments**
  - b. **Tracked changes**
  - c. **Mark as Final**
  - d. **Fill in Forms**
3. Use the \_\_\_\_\_ command to change the status of the document and set it as read-only.

*Fill in the blank space.*

# Lesson 4: Using Find and Replace

## Overview

In this lesson, you'll learn how to find and replace text by using wildcards, special characters, formatting, and styles. You'll participate in discussions and step-by-step demonstrations, and you'll have opportunities to put what you learn to practice.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. You would use the entries, **wh\***, **b?ll**, and **b[a-c]d** when:

*Select the correct option.*

- a. Finding all word forms
- b. Searching by using symbols
- c. Finding special characters
- d. Searching by using wildcards

2. The **Replace** formatting options include:

*Select all that apply.*

- a. **Font**
- b. **Bullets**
- c. **Tabs**
- d. **Language**

3. To begin using the advanced **Find** and **Replace** options:

*Indicate the correct sequence by adding the numbers 1–4 next to the following items.*

- a. In the **Editing** group ... \_\_\_\_\_
- b. Select **Replace**. \_\_\_\_\_
- c. Go to the **Home** tab. \_\_\_\_\_
- d. Select **More>>**. \_\_\_\_\_

# Topic 1: Find and replace text by using wildcards and special characters



Think about a time that you wrote a multiple-page word document and realized that you consistently misspelled a word. If you're working with a lot of text and need to replace a word, sentence, special character, or formatting choice, use the **Find and Replace** dialog box. But, what if you can't remember the exact spelling of the word you need to replace? This is when wildcards in **Find** and **Replace** prove especially helpful. *Wildcards* are special characters that stand in for unknown characters in text, and they're handy for finding multiple items that consist of similar but not identical data. To use wildcards to find text:

1. On the **Home** tab, select **Replace**. Alternatively, select Ctrl+H.
2. Select **More >>**.
3. Select the **Use wildcards** check box.
4. In the **Find what** box, enter the text you want.
5. In the **Replace with** box, enter the text you want.

The following screenshot depicts the **Find and Replace** dialog box.

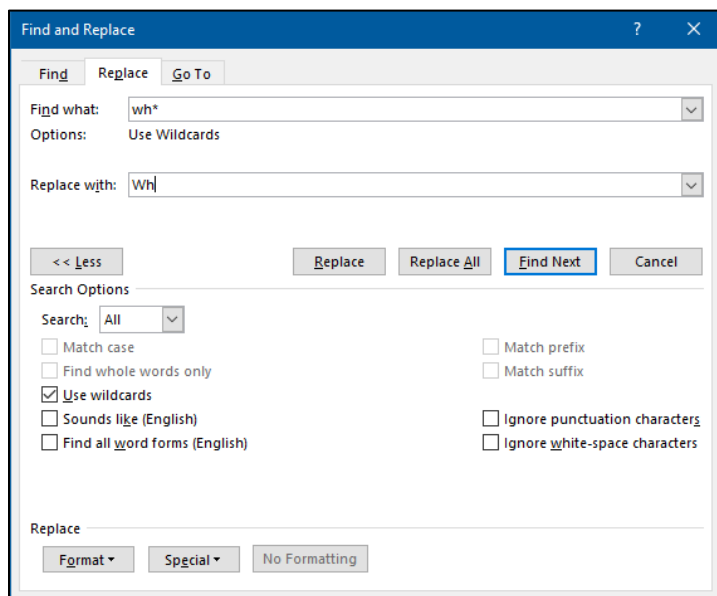
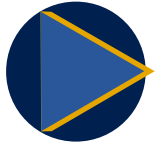


Figure 17: The **Use wildcards** check box



### Additional information

To review additional information, refer to: [Examples of wildcard characters](#)



### Video

To review a video, refer to: [Find and replace text](#)

The following table describes the different wildcard characters and includes examples of using them.

Character	Description	Examples
An asterisk (*)	Matches any number of characters. You can use the asterisk (*) anywhere in a character string.	<b>wh*</b> finds <b>what</b> , <b>white</b> , and <b>why</b> but not <b>awhile</b> or <b>watch</b> .
A question mark (?)	Matches a single character in a specific position.	<b>b?ll</b> finds <b>ball</b> , <b>bell</b> , and <b>bill</b> .
Brackets ( [ ] )	Matches characters inside the brackets.	<b>b[ae]ll</b> finds <b>ball</b> and <b>bell</b> but not <b>bill</b> .
An exclamation point (!)	Excludes characters inside the brackets.	<b>b[!ae]ll</b> finds <b>bill</b> and <b>bull</b> but not <b>ball</b> or <b>bell</b> . <b>[!a]*</b> finds all items that don't begin with the letter <b>a</b> .
A hyphen (-)	Matches a range of characters. Remember to specify the characters in ascending order (that is, A to Z and not Z to A).	<b>b[a-c]d</b> finds <b>bad</b> , <b>bbd</b> , and <b>bcd</b> .
A number sign (#)	Matches any single numeric character.	<b>1#3</b> finds <b>103</b> , <b>113</b> , and <b>123</b> .

Table 2: Descriptions and examples of wildcards

## Activity: Show and tell

In this activity, you'll follow a step-by-step demonstration on how to find and replace text by using wildcard and special characters.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrate using wildcards and special characters in **Find and Replace**.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Find and replace text by using wildcards and special characters



In this standalone try-it activity, you'll use wildcards and special characters in **Find and Replace**.

### Resources

You'll need the following resource for this try-it:

- **L4\_T1\_try\_grant\_info\_starter.docx** in this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Find each instance of **GR** and replace it with **gr**.
2. Replace every caret (^) with a blank space.
3. Find all the instances of **p** and **n** that have another letter between them (for example, **pen**).
4. Save the document and keep it open for the next topic.

## Topic 2: Find and replace formatting and styles



As you learned in the previous topic, you can find words by using wildcards and special characters. Similarly, you can find and replace specific formatting in a document.

1. On the **Home** tab, select **Replace**. Alternatively, select Ctrl+H.
2. Select **More**.
3. Select **Format**.
4. Select one of the following commands, as the following screenshot depicts:
  - **Font**
  - **Paragraph**
  - **Tabs**
  - **Language**
  - **Frame**
  - **Style**
  - **Highlight**

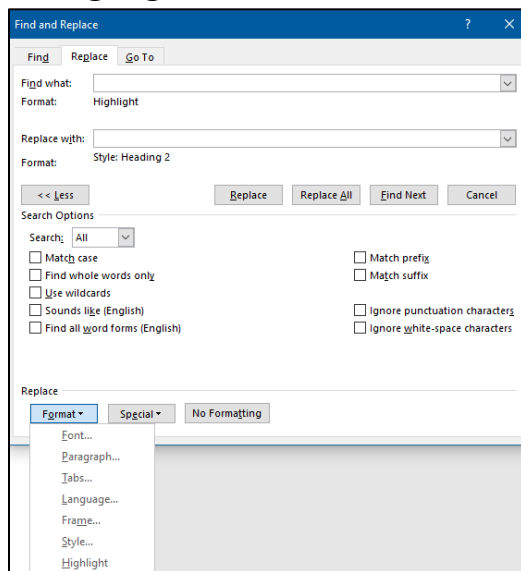


Figure 18: The **Format** menu

5. In the **Find and Replace** dialog box, select **No Formatting** to clear the formatting that applies to the text in the **Find what** and **Replace with** boxes.



### Video

To review a video, refer to: [Use a screen reader to find text with specific formatting in Word](#)

---

## Activity: Guess and tell

In this activity, you'll use your prior knowledge of the advanced **Find and Replace** options to hypothesize about how to find and replace formatting.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Review the **Find and Replace** dialog box, and hypothesize about the steps for finding formatting in the document.
2. Share your ideas with the class.
3. Participate in the discussion.

## Try-it: Find and replace formatting and styles



In this standalone try-it activity, you'll replace formatted text.

### Resources

You'll need the following resources for this try-it:

- Your document from the previous topic or **L4\_T2\_try\_grant\_info\_starter.docx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Replace highlighted text so it's not highlighted.
2. Replace text that has the **Strong** style applied so it has the **Heading 2** style.
3. Save and close the document.



# Wrap-up

Use these questions to check what you learned in this lesson:

1. A few of the advanced Search options include:

*Select all that apply.*

- a. **Match case**
- b. **Language**
- c. **Sounds like**
- d. **Style**

2. You can access the **Find and Replace** dialog box by going to \_\_\_\_\_  
or \_\_\_\_\_

*Fill in the blank spaces.*

3. Which of the following options in the **Find and Replace** dialog box can you use to search and replace by styles?

*Select the correct option.*

- a. **Find all word forms**
- b. **Format**
- c. **Match case**
- d. **Special**

# Glossary

<b>Authentication</b>	The process of validating information.
<b>Comments</b>	Extra information that you attach to specific parts of a document to make feedback clearer. Bubbles in the margin indicate where someone has left a comment.
<b>Encrypt</b>	What software does to convert information into a cipher or code to prevent unauthorized access.
<b>Formatting</b>	The way in which something is arranged or set out.
<b>Forms</b>	In Word, areas that others can fill out by using content controls. Content controls include things like check boxes, text boxes, and lists.
<b>Read-only</b>	A characteristic of a document meaning that others can read or copy the document but not modify it.
<b>Track Changes</b>	A tracking capability In Word. When you turn on Track Changes, Word marks deletions with strikethrough formatting and additions with underlines. Word also indicates different authors' changes by using different colors.

*Table 3: Glossary terms and definitions*

# Cornerstone

## Overview

In this Cornerstone, you'll create a proposal document for a state grant that will include reference tables—so that readers will be able to easily find photographs, objects, and other details of the proposal. After you finalize the document, you'll restrict editing by applying a password to that document.

## Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

<b>Help protect documents by limiting formatting and using passwords</b>	<ul style="list-style-type: none"> <li>• 1.2.1 Restrict editing</li> <li>• 1.2.2 Protect documents by using passwords</li> </ul>
<b>Use Find and Replace with wildcards, special characters, and formatting</b>	<ul style="list-style-type: none"> <li>• 2.1.1 Find and replace text by using wildcards and special characters</li> <li>• 2.1.2 Find and replace formatting and styles</li> </ul>
<b>Create and manage indexes</b>	<ul style="list-style-type: none"> <li>• 3.3.1 Mark index entries</li> <li>• 3.3.2 Create indexes</li> <li>• 3.3.3 Update indexes</li> </ul>
<b>Insert and configure table and caption properties</b>	<ul style="list-style-type: none"> <li>• 3.4.1 Insert figure and table captions</li> <li>• 3.4.2 Configure caption properties</li> <li>• 3.4.3 Insert and modify a Table of Figures</li> </ul>

*Table 4: Cornerstone objectives*

## Duration

50 minutes

# Instructions

1. Complete the tasks for the document.
2. When saving your document, add your name to the end of the file name—for example, use **Background\_Espino.docx**. Follow your teacher's directions for where to save your files.
3. When you're done with the Cornerstone, assess your completion and enter the points you think you earned in the task lists in the following section. You can ask your teacher for help if needed.

## Tasks

You'll work with one file in this Cornerstone. The following section has the tasks you need to do within the file.

### File 1: Cornerstone\_proposal\_starter.docx

#### Task: Create a Table of Figures (3 points)

1. Caption each graphic. (1 point) (Exam objective 3.4.1)
2. Insert a new page at the end of the document, and then insert the text **Table of Figures** formatted with the **Heading 2** style. (1 point) (No exam objective)
3. Insert a Table of Figures. (1 point) (Exam objective 3.4.1)

Points scored: \_\_\_\_\_ / 3

#### Task: Create an index (3 points)

1. Mark an index entry for all text formatted with the **Heading 2** style. (1 point) (Exam objective 3.3.1)
2. Insert a new page at the end of the document, and then insert the text **Index** formatted with the **Heading 2** style. (1 point) (No exam objective)
3. On the new page at the end of the document, insert an index. (1 point) (Exam objective 3.3.2)

Points scored: \_\_\_\_\_ / 3

### Task: Find and replace (2 points)

1. Find each instance of **Heading style 3** and replace it with **Heading style 4**. (1 point) (Exam objective 2.1.2)
2. Note that the document has numerous misspellings of the word "corn." Each misspelling has the second letter wrong (that is, it uses the letter "i"). Using a wildcard, find and replace each misspelling with the correct spelling. (1 point) (Exam objective 2.1.2)

Points scored: \_\_\_\_\_ / 2

### Task: Update an index (2 points)

1. Mark an index entry for **Community Supported Agriculture** on page 2 in the first bulleted item, which starts with **Our CSA (Community Supported Agriculture)** all text formatted as **Heading 2** style. (1 point) (Exam objective 3.3.1)
2. Update the index. (1 point) (No exam objective)

Points scored: \_\_\_\_\_ / 2

### Task: Update the Table of Figures (2 points)

1. Insert a caption for the table that appears above the table. (1 point) (Exam objectives 3.4.1 and 3.4.2)
2. Update the Table of Figures to include the table. (1 point) (Exam objective 3.4.3)

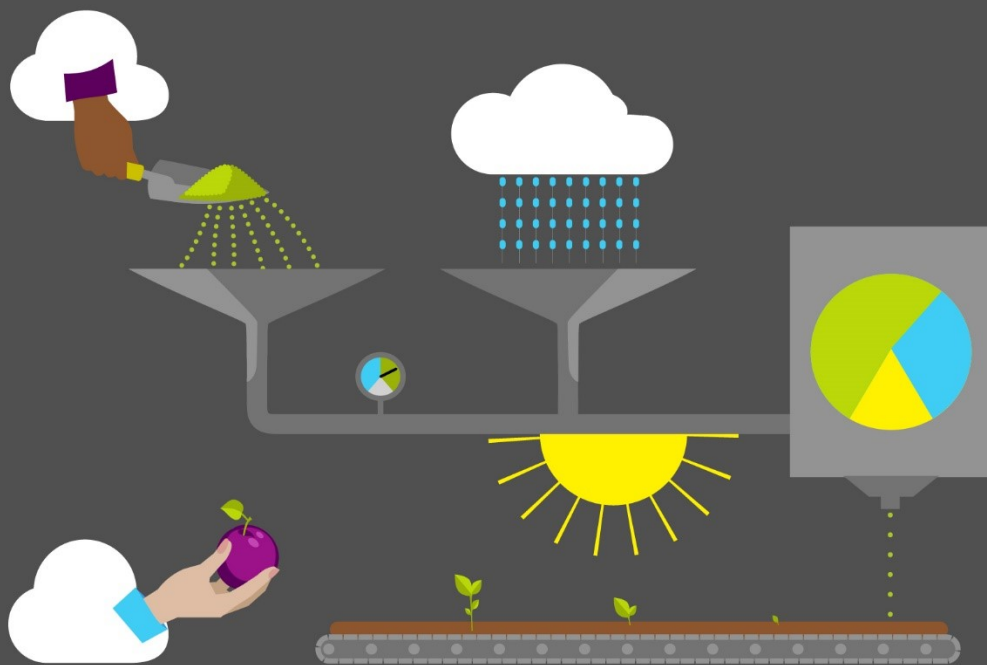
Points scored: \_\_\_\_\_ / 2

### Task: Help protect the document (2 points)

1. Restrict editing to allow only tracked changes, and enforce that with the password **1234**. (1 point) (Exam objective 1.2.1)
2. Mark the document as final. (1 point) (Exam objective 1.2.2)

Points scored: \_\_\_\_\_ / 2

Total score: \_\_\_\_\_ / 14



# Student Guide

40570A

Microsoft Word expert 2019

Module 5: Managing document content

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# Module overview

## Description

This module consists of three lessons that help you learn how to use some of the advanced features of Microsoft Word 2019. By the end of this module, you will be able to modify a form, create and insert custom fields, modify field properties, add a link to external document content, and insert and configure standard content controls. Then save the file as an HTML document to prepare for use on a website.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Inserting links and objects	Insert links and external content.	<ul style="list-style-type: none"> <li>• 1.1.4</li> </ul>
Working with fields	Insert and configure fields.	<ul style="list-style-type: none"> <li>• 4.1.1</li> <li>• 4.1.2</li> <li>• 4.1.3</li> <li>• 4.1.4</li> </ul>
Cornerstone: Creating a new form for a seed inventory	Add form controls such as check boxes, combo boxes and fields to forms.	<ul style="list-style-type: none"> <li>• 1.1.4</li> <li>• 4.1.1</li> <li>• 4.1.2</li> <li>• 4.1.3</li> <li>• 4.1.4</li> </ul>

*Table 1: Objectives by lesson*

## Scenario

Munson's Pickles and Preserves Farm would like to gather information from website visitors who are interested in receiving the community-supported agriculture (CSA) program newsletter. You have been asked to finalize the form that they will use to collect this information by adding form fields and content controls, and a link for visitors to find additional information.



# Cornerstone

Munson's Pickles and Preserves Farm currently tracks their seed inventory manually, on multiple pieces of paper. You want to showcase your new skills and create a form in Word that staff can use to quickly enter inventory data information.

# Lesson 1: Inserting links and objects

## Overview

In this lesson, you'll learn how to insert links and external content. You'll participate in a discussion about the benefits of inserting links and teach a classmate about inserting objects. You'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. To embed text from another file, navigate to the **Insert** tab, go to the **Text** group, and then select \_\_\_\_\_

*Fill in the blank space.*

2. You can link the following content:

*Select all that apply.*

- a. Websites
- b. Existing documents
- c. Bookmarks
- d. New documents

3. You can link any word or \_\_\_\_\_ in the document.

*Fill in the blank space.*

## Topic 1: Link to content



For the convenience of you and your readers, Word enables you to link to a variety of objects, such as webpages, existing or new files, email addresses, and specific locations in your document.

## Link to a file on your computer

1. Select the text or picture that you want to display as a link.
2. On the **Insert** tab, select **Link**.
3. In the **Insert Hyperlink** dialog box, and then under **Link to**, select **Existing File or Web Page**.
4. From the **Look in** drop-down menu, navigate to your file.
5. Select **OK**.

The following screenshot depicts the **Insert Hyperlink** dialog box:

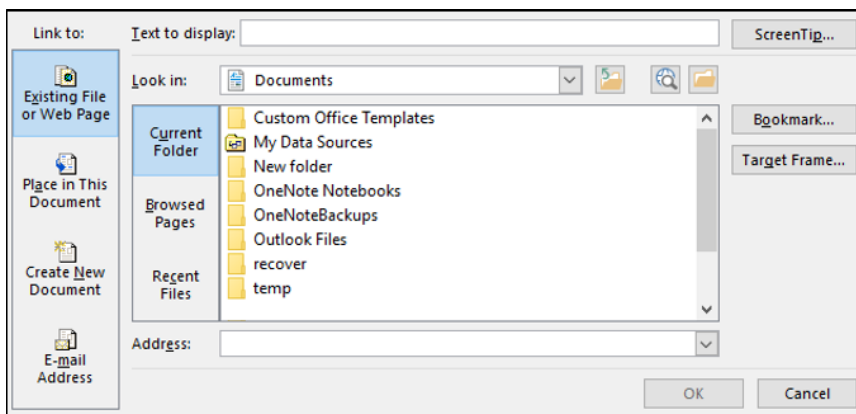


Figure 1: **Insert Hyperlink** dialog box

## Link to a new file on your computer

1. Select the text or picture that you want to display as a link.
2. On the **Insert** tab, select **Link**.
3. In the **Insert Hyperlink** dialog box, under **Link to**, select **Create New Document**.
4. Under **Link to**, enter a name for the new file, and either use the location displayed under **Full path** or browse to a different save location by selecting **Change**. You can also choose whether to **Edit the new document later** or open and **Edit the new document now**.

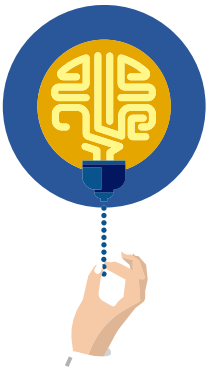
## Link to a new email message

1. Select the text or picture that you want to display as a link.
2. On the **Insert** tab, select **Link**.
3. In the **Insert Hyperlink** dialog box, under **Link to**, select **E-mail Address**.

4. Enter the email address that you want in the **E-mail Address** box or select an address in the **Recently used e-mail addresses** list.
5. In the **Subject** box, enter the subject of the message.

## Link to a location in the document

1. Select the text or picture that you want to display as a link.
2. On the **Insert** tab, select **Link**.
3. From the **Insert Hyperlink** dialog box, under **Link to**, select **Place in This Document**.
4. In the list, select the heading (current document only) or bookmark to link to your text or picture.



### Did you know?

You can add a **ScreenTip** that appears when you hover over the hyperlink, select **ScreenTip** in the top-right corner of the **Insert Hyperlink** dialog box and enter your text.



### Additional information

To review additional information on creating links, go to: [Create or edit a hyperlink](#)



### Additional information

To review additional information on bookmarks, go to: [Add or delete bookmarks in a Word document or Outlook message](#)

---

## Activity: Discuss and learn

Participate in a class discussion about the benefits of linking resources in a document. Then, with a partner, determine the steps to linking resources and share your ideas with the class.

## Resources required

You will need the following resources for this activity:

None

## Activity instructions

Participate in the activity by following these instructions:

1. Participate in the class discussion about the benefits of linking resources in a document.
2. You should partner with a classmate to explore the **Insert** tab and its functionality, including how to link resources and configure options for screen tips, bookmarks, and targets.
3. Share your ideas with the class.

## Try-it: Link to content



In this leveled try-it, you will link a document to additional resources.

## Try-it 1

In this try-it, you will insert a link to email and create a document.

## Resources

You will need the following resources for this try-it:

- Open **L1\_T1\_try1\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks to perform during this try-it:

1. At the end of the document add the following text:
  - **Submit your ideas.**
  - **Please submit your ideas for featured produce using this document.**
  - **Submit your ideas by email.**
2. Format **Submit your ideas** with the **Heading 1** style.
3. Insert link to the word **document** to create a new document named **Ideas** and save in the documents folder.

4. Insert a link to the word **email** to the email [someone@example.com](mailto:someone@example.com)
5. Save and keep the document open for the next topic.

## Try-it 2

In this try-it, you will insert a link to places in the current document and insert a link to create a new document.

## Resources

You will need the following resources for this try-it:

- Open **L1\_T1\_try2\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks to perform during this try-it:

1. At the end of the document add the following text:
  - **Submit your ideas.**
  - **Please submit your ideas for featured produce using this document.**
  - **Submit your ideas by email.**
2. Format **Submit your ideas** with the **Heading 1** style.
3. Insert a link to the word **document** to create a new document named **Ideas** and saved in the documents folder with a new window target frame.
4. Insert a link to the word **email** to the email [someone@example.com](mailto:someone@example.com) with the screen tip **email someone@example.com**.
5. In the first sentence beginning with **We are happy...** link concord grapes to the section heading, **Concord Grapes**. Do the same for pumpkins and romaine lettuce.
6. Save and keep the document open for the next topic.

## Topic 2: Insert objects



In the previous topic you learned how to link a variety of objects to make it easier for your readers to access documents, emails, and places in the document. While linking objects allows your readers easy access, inserting objects allows you make the resource a part of the Word file.

- In the **Object** dialog box, select the **Create New** tab, and then select an option from the **Object type** list. You can choose from a variety of object types, as the following screenshot depicts:

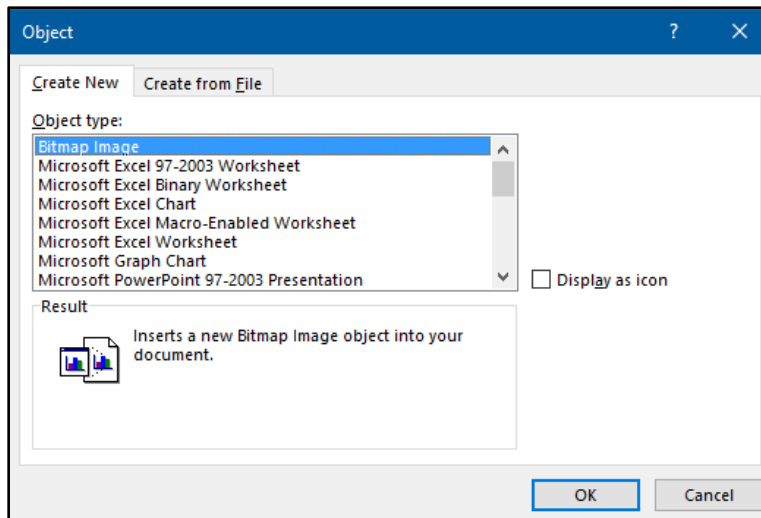
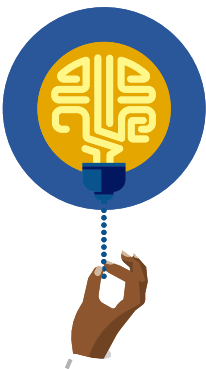


Figure 2: **Object** dialog box

## To link or embed an object that's already been created

In the **Object** dialog box, select the **Create from File** tab, and then select **Browse** to find the file you want to insert.



### Did you know?

If you want the file to appear as a selectable icon, rather than the first page of the file, select **Display as icon**. If you select this check box, you can choose a different icon by selecting **Change Icon**.



### Additional information

To review the video on inserting objects, go to: [Insert an object in Word or Outlook](#)

## Activity: Each one, teach one

Work with a classmate to learn how to insert an object and text.

### Resources required

You will need the following resources for this activity:

None

### Activity instructions

Participate in the activity by following these instructions:

1. Partner with a classmate.
2. One partner should choose to insert an object and the other should choose to insert text.
3. Use **Help** to research the steps to complete your subject.
4. Teach your partner how to complete the task you choose.

## Try-it: Insert objects



In this leveled try-it, you will insert text and objects.

### Try-it 1

In this try-it, you will insert text from a document.

### Resources

You will need the following resources for this try-it:

- Open **Uses.docx** in this lesson's Learning Activity Resources.
- Use the file from the previous topic or open **L1\_T2\_try1\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

### Instructions

The following are the general tasks to perform during this try-it:

1. Save the file, **Uses.docx** to your computer.
2. Place your cursor in the paragraph before the **Submit your ideas** text and insert the text from the **Uses.docx** file.



3. Place your cursor after the text you just entered and insert an object to create a new Excel chart. Keep the preset text.
4. Save and close the document.

## Try-it 2

In this try-it, you will insert an object and text into an existing file. Then you will create bookmarks and link them to text.

## Resources

You will need the following resources for this try-it:

- Open **Uses.docx** in this lesson's Learning Activity Resources.
- Use the file from the previous try-it or open **L1\_T2\_try2\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks to perform during this try-it:

1. Save the **Uses.docx** in this lesson's Learning Activity Resources to your computer.
2. Place your cursor in the paragraph before the **Submit your ideas** text and insert the text from the **Uses.docx** file.
3. Use the text that you just entered to create a bookmark for concord grapes, pumpkins, and romaine lettuce.
4. Add a sentence to each produce section (concord grapes, pumpkins, and romaine lettuce) directing the reader to reference the **Uses of produce** section of the report and link a word to the bookmark that you created.
5. Place your cursor after the text you just entered and insert an object to create a new Excel chart then keep the preset text.
6. Save and close the document.

# Wrap-up

1. You can **Link to: a Place in This Document** using text formatted as a \_\_\_\_\_ or \_\_\_\_\_

*Fill in the blank spaces.*

2. You can add descriptive text when you hover over a link by using the \_\_\_\_\_ option.

*Fill in the blank space.*

3. If you want your link to open in a whole page or new page use the following option:

*Select the correct option.*

- a. **ScreenTip**
- b. **Show as icon**
- c. **Target Frame**
- d. **Place in this document**

# Lesson 2: Working with fields

## Overview

In this lesson, you'll learn how to create custom forms. You'll participate in a demonstration on how to create custom form fields and determine the steps to modify the field properties. You'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. To edit a form, you must be in \_\_\_\_\_ mode.

*Fill in the blank space.*

2. A form field in Word is also known as:

*Select the correct option.*

- a. A merge field
- b. A macro
- c. A content control
- d. A module

3. From which of the following tabs can you enter form fields?

*Select the correct option.*

- a. **Home**
- b. **Insert**
- c. **Review**
- d. **Developer**

# Topic 1: Insert custom fields



Throughout this course you have used a variety of fields, such as **Date & Time** and **Page Number**. In Module 3, you worked with **Quick Parts** and **AutoText**. During this topic you will insert custom fields. Fields are useful as placeholders for data that might change in your document, and you can use them to automate certain aspects of your document. Field codes are automatically inserted when you use Word features like page numbers or a table of contents, but you can insert field codes manually for other tasks like performing calculations or filling in document content from a data source.

1. Place your cursor where you want to insert a field.
2. From the **Insert** tab, **Text** group, select **Quick Parts** then choose **Field**.
3. In the **Field name** list, select a field name. You are probably already familiar with the following fields:

Field	Purpose
<i>Bookmark</i>	Creates a bookmark
<i>Date</i>	Creates an automatically updating date code
<i>Hyperlink</i>	Inserts a hyperlink
<i>NoteRef</i>	Inserts a footnote number
<i>Page</i>	Inserts a page numbering code
<i>TOC</i>	Inserts a table of contents

A few other fields are:

Field	Purpose
<b>Author</b> field	Inserts the author's name specified on the <b>Summary</b> tab in the <b>Properties</b> dialog box.
<b>DocProperty</b> field	Inserts the indicated document information that's currently entered in the <b>Properties</b> dialog box.
<b>Comments</b> field	Inserts contents of the <b>Comments</b> box on the <b>Summary</b> tab in the <b>Properties</b> dialog box.

Field	Purpose
<b>Subject</b> field	Inserts the contents of the <b>Subject</b> box from the <b>Properties</b> dialog box.

The **Field** dialog box assists you in customizing the field.

- Categories allow you to filter results by a specific category.
- Field names are listed in alphabetic order.
- Once you choose a field name a description will appear.
- **Field properties** allows you to customize your field with options that are specific to the field that you choose.

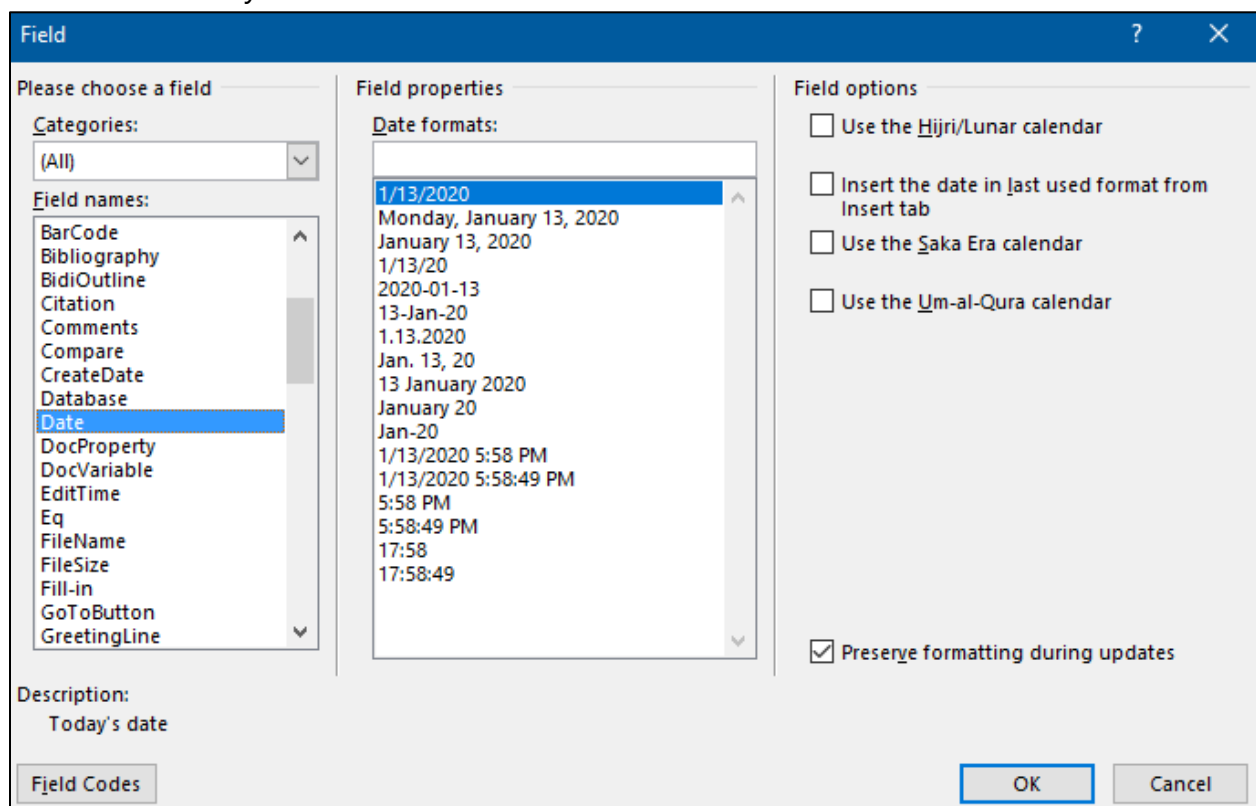


Figure 3: **Field** dialog box



### Additional information

To review additional information on inserting fields controls, go to: [Insert, edit, and view fields in Word](#)

For a comprehensive list of field codes go to: [List of field codes in Word](#)

## Activity: Show and tell

Participate in a class discussion and demonstration about inserting fields in a Word document.

### Resources required

You will need the following resources for this activity:

- Open **L2\_T1\_act\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the class discussion about inserting fields.
2. Participate in the teacher-led demonstration on inserting fields.
3. Ask clarifying questions.

## Try-it: Insert custom fields



In this standalone try-it, you will create a document with fields.

### Resources

You will need the following resources for this try-it:

- Use your file from the previous lesson or open **L2\_T1\_try\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

### Instructions

The following are the general tasks to perform during this try-it:

1. In the next paragraph after the **Report** subtitle, insert an **Author** field.
2. In the next paragraph after the **Author** field insert a **Date** field.
3. Save and keep the document open for the next topic.

## Topic 2: Insert content controls



In the previous lesson, you learned to create a convenience for you and your readers by inserting links and content into a document. Word allows you to conveniently collect information using a form. Word has form options like check boxes, text boxes, date pickers, and drop-down lists.

If the **Developer** tab isn't displayed in the ribbon, from the **File** tab, select **Options** then **Customize Ribbon**. Then select the **Developer** tab to display it.

Place your cursor where you want to insert the control.

- Select **Developer** tab, and from the **Controls** group, select one of the following options:
  - **Rich Text Content Control**. Users can format text as bold or italic and enter multiple paragraphs.
  - **Plain Text Content Control**. Limits text formatting options for users.
  - **Building Block Content Controls**. When you want users to choose a specific block of text.
  - **Combo Box Content Controls**. Users can select from a list of choices that you provide, or they can enter in their own information.
  - **Drop-Down List Content Controls**. Users can only select from the list of choices.
  - **Date Picker Content Controls**. Allows users to choose a specific date.
  - **Check Box Content Controls**. Allows users to check a box.



### Additional information

To review additional information on form content controls, go to:  
[Create forms that users complete or print in Word](#)

---

## Activity: Discuss and learn

Participate in a class discussion and demonstration about content controls in a Word document.

### Resources required

You will need the following resources for this activity:

None

## Activity instructions

Participate in the activity by following these instructions:

1. Participate in the class discussion about the options for content-control fields.
2. Participate in the teacher-led demonstration on inserting content controls.
3. Ask clarifying questions.

## Try-it: Insert content controls



In this standalone try-it, you will create a document with content controls.

## Resources

You will need the following resources for this try-it:

- Use your file from the previous topic or open **L2\_T2\_try\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks to perform during this try-it:

1. Insert a page at the end of your document, and then create a form for Munson's to collect information from customers interested in receiving the newsletter. You need to collect the following information.
  - Name
  - Address
  - Phone
  - Email
  - Birthdate
  - Indicate if they would like to receive the newsletter by mail or email
  - Comment area
2. Choose at least three styles of control boxes for your form.
3. Save and keep the form open for the next topic.



## Topic 3: Modify form field properties



While creating your form you can customize the content controls by changing the properties. Each content control has properties that can be set or changed.

1. Select the content control that you want to change.
2. On the **Developer** tab, select **Controls** group, and then select **Properties**.
3. Select the properties that you want to change.

The options available in the **Content Control Properties** dialog box depend on the control type. The following screenshot depicts the **Content Control Properties**:

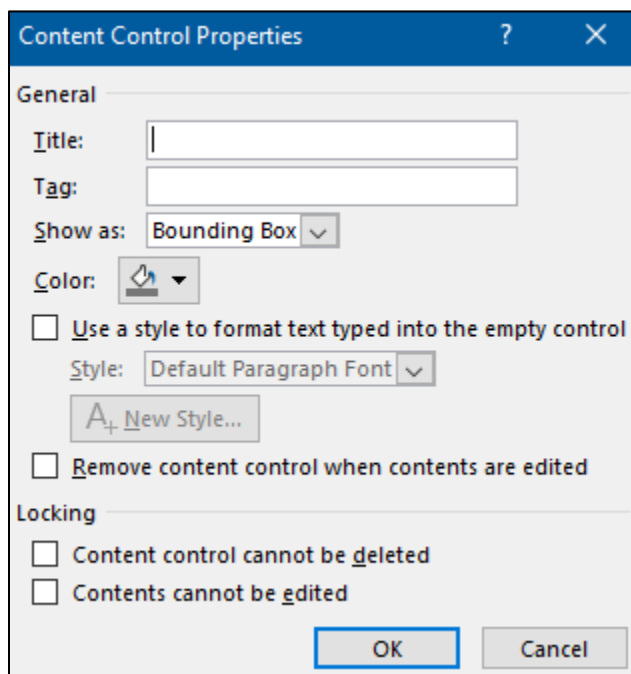


Figure 4: **Content Control Properties**

The following are available **Content Control Properties** settings, regardless of field types:

- **Title**: the text that appears in the title bar across the top of the control.
- **Tag**: important only if you are using content controls to create a document form. If you plan to use the document in conjunction with XML programs, then programs use tags like variable names to identify the control boxes. If you are not using XML, then you can duplicate the **Title** in the **Tag** field.
- **Show As**: how the field appears in the document.
- **Bounding Box**: a large box around the control.

- **Start/End Tag:** displays graphical brackets around the field.
- **None:** makes the field content display like regular text or graphics in the document.
- **Remove Content Control When Contents Are Edited:** deletes the field placeholder after the user enters content into it.
- **Content Control Cannot Be Deleted:** prevents the users from deleting the control.
- **Contents Cannot Be Edited:** prevents the users from changing what can be entered in the control.
- **Text:** the option **Allow Carriage Returns (Multiple Paragraphs)** allows users to begin a new paragraph in the field. This option is always available in **Rich Text Content Control**.

The following screenshot of the **Content Controls Properties** depicts text controls:

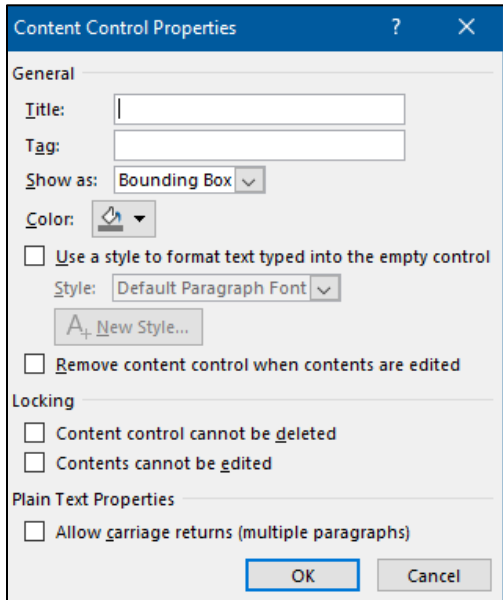


Figure 5: **Text Content Control Properties**

- **List and combo boxes:** the option **Drop-Down List Properties** allows you to set up the list that appears.
4. From the **Drop-Down List Properties** area, select **Add**.
  5. Enter the text that should appear on the screen in the **Display Name**.
  6. Enter the **Value**: If you have a database connected to the form, this is what is entered into the database.

The following screenshot of the **Content Control Properties** depicts list controls:

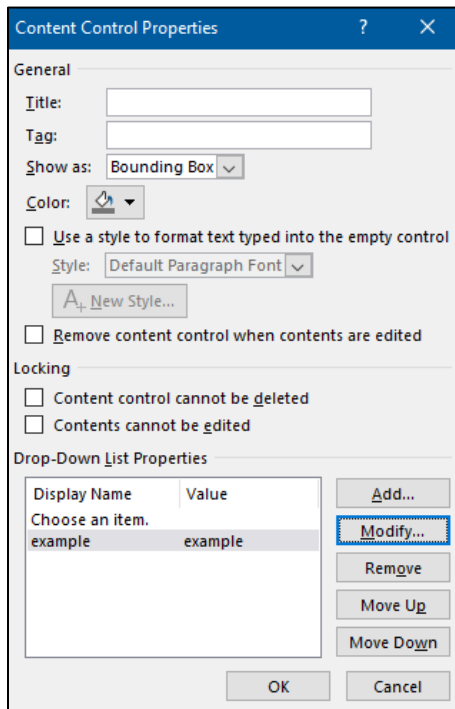


Figure 6: Drop-down **Content Control Properties**

- **Date.** Control the following date setting.
- **Display the Date Like This.** Set the formatting.
- **Locale.** Select a country or region and language.
- **Calendar Type.** Select a type based on the country or region.
- **Store XML Contents in the Following Format When Mapped.** Important only if you will be connecting to an XML data source.

The following screenshot of the **Content Controls Properties** depicts date controls:

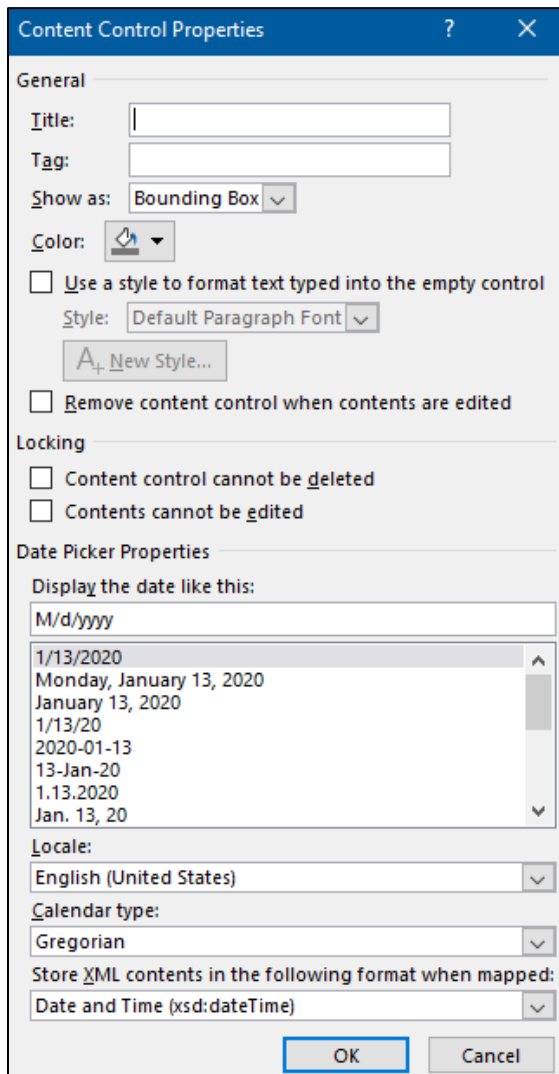


Figure 7: **Date Picker Content Control Properties**

- **Building Blocks.** Set to access any building block, such as **Quick Parts**, tables, and lists.
- 7. Under the **Document Building Block Properties** in the **Gallery** drop-down menu, select the building block.
- 8. In the **Category:** drop-down menu, select where the building block **building block** is stored.
- 9. Select **OK**.

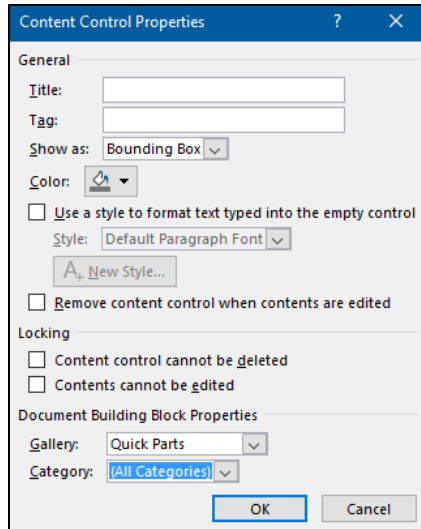


Figure 8: **Building Blocks Content Control Properties**



### Additional information

To review additional information on content controls, go to: [Create forms that users complete or print in Word](#)

## Activity: Think-pair-share

Work in a small group to discover how to modify **Content Control Properties**. Share what you have learned with your group members.

### Resources required

You will need the following resources for this activity:

None

### Activity instructions

Participate in the activity by following these instructions:

1. Form groups of four.
2. Each student will select one content control to research, such as: text, date picker, lists, and building blocks.
3. Use the **Help** feature to determine the steps to modify the form field properties.
4. Share what you have learned with your group.
5. Ask any clarifying questions.

## Try-it: Modify form field properties



In this standalone try-it, you will modify form field properties.

### Resources

You will need the following resources for this try-it:

- Use your file from the previous topic or open **L2\_T3\_try\_farm\_produce\_report\_starter.docx** in this lesson's Learning Activity Resources.

### Instructions

The following are the general tasks to perform during this try-it:

1. At the beginning of the document under the **Report** subtitle, modify your **Author** field to format the content as **First Capital**.
2. At the beginning of the document under the **Report** subtitle, modify your **Date** field to format the content as **day of the week, month, day, and year**.
3. At the end of the document, format each of your content controls by adding a title and color and modifying one other option.
4. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. Which of the following actions modifies a field's properties?  
*Select the correct option.*
  - a. Double-clicking the field
  - b. Right-clicking or accessing the context menu on the field and choosing **Edit Field**
  - c. Right-clicking or accessing the context menu on the field and choosing **Show Field Code**
  - d. Selecting **Modify** on the **Insert** tab

2. Which of the following instructions best describes how to insert a custom field in a document?

*Select the correct option.*

- a. From the **Insert** tab, select **Text** group, and then select **Quick Parts**.
- b. From the **Insert** tab, select **Text** group, and then select the **Text Box**.
- c. From the **Insert** tab, select the **Fields** gallery, and then select the custom field.
- d. From the **Properties** dialog box, on the **Custom** tab, select the field, and then select **Insert**.

3. A form field in Word is also known as which of the following?

*Select the correct option.*

- a. A merge field
- b. A macro
- c. A content control
- d. A module

# Glossary

<b>Content controls</b>	Data collection field in a form.
<b>Field</b>	A placeholder where Word inserts content in a document. Word automatically uses fields when specific commands are activated, such as those for inserting dates, page numbers, and a table of contents.
<b>Form</b>	A document that has one or more data collection fields (called content controls) inserted, which can contain data.
<b>Field codes</b>	Another name for field.

*Table 2: Glossary terms and definitions*



# Cornerstone

## Overview

In this Cornerstone you will create a document including text from another file, links to resources, fields, and content controls.

## Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

<b>Add a link to external document content</b>	<ul style="list-style-type: none"> <li>• OD 1.1.4: Link to external document content</li> </ul>
<b>Create custom fields</b>	<ul style="list-style-type: none"> <li>• OD 4.1.1: Add custom fields</li> </ul>
<b>Modify field properties</b>	<ul style="list-style-type: none"> <li>• OD 4.1.2: Modify field properties</li> </ul>
<b>Insert content controls</b>	<ul style="list-style-type: none"> <li>• OD 4.1.3: Insert standard content controls</li> </ul>
<b>Modify form field properties</b>	<ul style="list-style-type: none"> <li>• OD 4.1.4: Configure standard content controls</li> </ul>

*Table 3: Cornerstone objectives*

## Duration

50 minutes

## Instructions

1. Complete the following tasks for each file.
2. When saving your file, add your name to the end of the filename; for example, "Form\_Espino." Follow your teacher's directions for a location to save your files.
3. When you finish the Cornerstone, assess your completion and enter the points you think you earned within the following task lists. You can ask your teacher for help if needed.

# Tasks

In this Cornerstone, you will create a file that includes five tasks.

## File 1: None

### Task: Create a new document (3 points)

1. Create a **New Document**. (1 point) (Exam objective n/a)
2. Add the title **Munson's Seed Inventory**. (1 point) (Exam objective n/a)
3. Format the title **Munson's Seed Inventory** with the **Title** style centered on the page. (1 point) (Exam objective n/a)

Points scored: \_\_\_\_\_ / 3

### Task: Insert Document Properties fields (3 points)

1. Update your **Document Properties** so the author is **Munson's Pickles and Preserves Farm**. (0 points) (Exam objective n/a)
2. Update your **Document Properties** to include the comment: **Document the seed inventory**. (0 points) (Exam objective n/a)
3. In the paragraph after the title, insert an **Author** and **Comment** field. (1 point) (Exam objective 4.1.1)
4. Configure the **Author** field to **First capital**. (1 point) (Exam objective 4.1.2)
5. Update your **Document Properties** to include the comment: **Please use this form to document the seed inventory**. (0 points) (Exam objective n/a)
6. Update the **Comment** field in your document. (1 point) (Exam objective 4.1.2)

Points scored: \_\_\_\_\_ / 3

### Task: Add content controls (6 points)

1. Create a form to collect the following information: date, name, type, planting schedule, and comments. (0 points) (Exam objective n/a)
2. Format the text and layout with your own ideas. (1 point) (Exam objective n/a)
3. Add a **Date Picker Content Control** to collect the date. (1 point) (Exam objective 1.1.3)
4. Add a **Plain Text Content Control** to collect the name. (1 point) (Exam objective 1.1.3)

5. Add a **Check Box Content Control** to collect the type. (fruit or vegetable) (1 point) (Exam objective 1.1.3)
6. Add a **Drop-Down List Content Control** to collect the planting schedule. (1 point) (Exam objective 1.1.3)
7. Add a **Rich Text Content Control** to collect comments. (1 point) (Exam objective 1.1.3)

Points scored: \_\_\_\_\_ / 6

### Task: Configure content controls (13 points)

1. Configure the **Date Picker Content Control** with the title **Today's date** and the display date as **MMMM d, yyyy**. (2 points) (Exam objective 1.1.4)
2. Configure the **Plain Text Content Control** with the title **Seed name** and allow carriage returns. (2 points) (Exam objective 1.1.4)
3. Configure the fruit **Check Box Content Control** with the title **Fruit** and change the check symbol (2 points) (Exam objective 1.1.4)
4. Configure the vegetable **Check Box Content Control** with the title **Vegetable** and change the check symbol. (2 points) (Exam objective 1.1.4)
5. Configure the **Drop-Down List Content Control** with the title **Season** and the options **spring, summer, fall, and winter**. (2 points) (Exam objective 1.1.4)
6. Configure the **Rich Text Content Control** with the title **Comments**. Create a new style for the text. (3 points) (Exam objective 1.1.4)

Points scored: \_\_\_\_\_ / 13

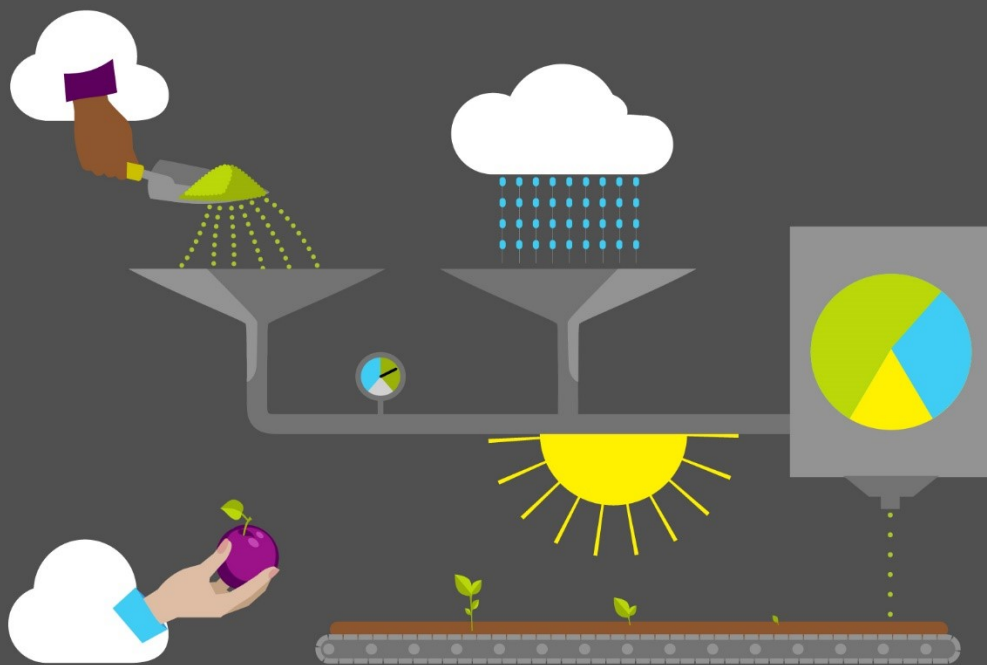
### Task: Insert links and objects (2 points)

1. In the paragraph after your drop-down content control, add the following text: **We have updated planting guidelines. Please refer to the following information:**. (0 points) (Exam objective n/a)
2. Insert the text from the **planting\_info.docx**. (1 point) (Exam objective 1.1.4)
3. In the paragraph after the inserted text ending in **...growth of the lettuce**, insert the text **Please direct any questions to the Munson's Pickles and Preserves Farms office team via email**. (0 points) (Exam objective n/a)

4. Insert an email link to the word **email** in the text you just entered, to email **someone@example.com** with the ScreenTip **someone@example.com**. (1 point)  
(Exam objective 1.1.4)

Points scored: \_\_\_\_\_ / 2

FILE 1 TOTAL POINTS: \_\_\_\_\_ / 27



# Student Guide

40570A

Microsoft Word expert 2019

Module 6: Creating and managing macros

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# Module overview

## Description

This module consists of two lessons designed to help you learn how to use some of the advanced features of Microsoft Word 2019. By the end of this module, you'll be able to run, record, edit, and copy macros.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objective(s)
Recording simple macros	Run and record simple macros.	<ul style="list-style-type: none"> <li>• 4.2.1</li> <li>• 4.2.2</li> </ul>
Editing and copying macros	Edit a simple macro and copy the macro to other documents and templates.	<ul style="list-style-type: none"> <li>• 4.2.3</li> <li>• 4.2.4</li> </ul>
Cornerstone: Mighty macro power	Create macros and edit macros in a document, add the new macros to a keyboard shortcut button, and then make them available from the <b>Quick Access Toolbar</b> and a custom ribbon group.	<ul style="list-style-type: none"> <li>• 4.2.1</li> <li>• 4.2.2</li> <li>• 4.2.3</li> <li>• 4.2.4</li> </ul>

*Table 1: Objectives by lesson*

## Scenario

Customers participating in Munson's Pickles and Preserves Farm Community Supported Agriculture (CSA) Program can submit recipes to the Annual Recipe Contest. Selected recipes are included in the Annual Munson's Pickles and Preserves Farm Cookbook. Entries are submitted on digital recipe cards and must be formatted prior to publication. You'll record a macro (a shortcut) to apply the correct formatting to the submitted recipes before adding them to the Cookbook template.

# Cornerstone

Munson's Pickles and Preserves Farm would like to be able to quickly create a letter document that includes their logo, the current date, and an address placeholder. You think that a macro would be great way to accomplish this task! You'll create a new macro that creates a new document, inserts the current date, and includes an address placeholder, so that your coworkers can quickly create a new document with these elements. You'll then make the new macro available in all new Word documents.



# Lesson 1: Recording simple macros

## Overview

In this lesson, you'll learn how to run and record simple macros. You'll participate in demonstrations and discussions, and you'll have opportunities to put into practice what you learn along the way.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Macros are used to:  
*Select the correct option.*
  - a. Lock a document.
  - b. Automatically recover documents.
  - c. Perform repetitive work.
  - d. Do work that is not performed daily.
2. If you create a document with a macro and you want to save the document to include the macro, you must save the document in which file format?  
*Select the correct option.*
  - a. .docx
  - b. .doct
  - c. .dotx
  - d. .docm

3. A macro that has been assigned a keyboard shortcut can be run in which of the following?

*Select all that apply.*

- a. A blank document
- b. An existing document
- c. A template
- d. A macro-enabled document

## Topic 1: Run existing simple macros



Think about repetitive tasks that you perform daily. This could be your morning routine, when you wake up, brush your teeth, and eat breakfast. Wouldn't it be nice to automate those tasks to speed up your morning? In Word, you can automate frequently performed tasks by creating and running macros. A macro is a series of commands and instructions that you group together as a single command to accomplish a task automatically.

To run a macro, select the button on the **Quick Access Toolbar**, use the keyboard shortcut, or run the macro from the **Macros** list.

1. From the **View** tab, **Macros** group, select **View Macros**, as depicted in the following screenshot.

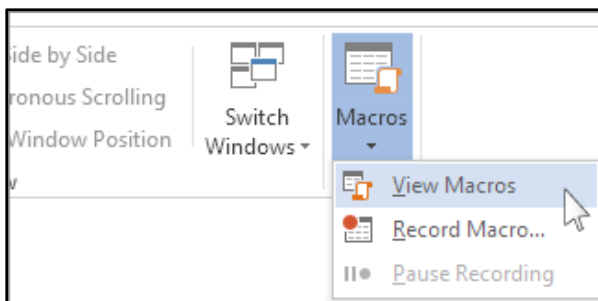


Figure 1: The **View Macros** option from the **View** tab

2. In the list under **Macro** name, select the macro, as depicted in the following screenshot.

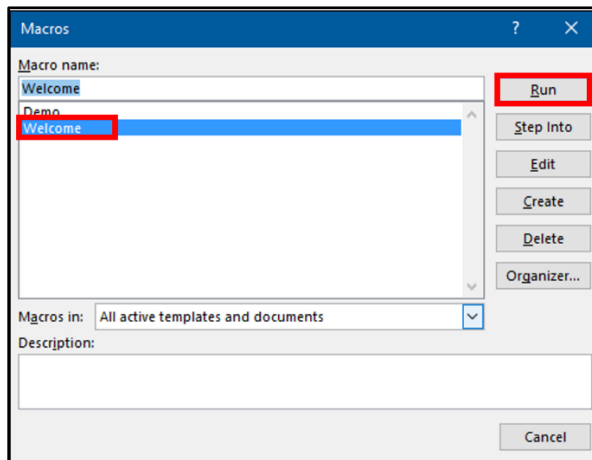


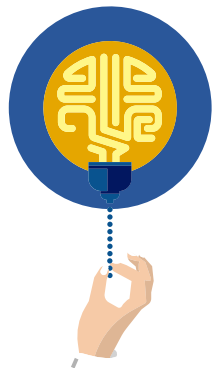
Figure 2: The **Macros** dialog box

3. Select **Run**.



#### Additional information

To review the information on running a macro, go to: [Create or run a macro](#)



#### Did you know?

You can access macro tools from the **Developer** tab, **Code** group.

## Activity: Show and tell

In this activity, follow along as your teacher demonstrates how to add an additional editing and display language.

## Resources required

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrating how to open a macro-enabled document and run existing macros.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Run existing simple macros



In this standalone try-it activity, you'll run macros from the **Macros** list.

## Resources

You'll need the following resources for this try-it:

- Open **L1\_T1\_try\_macro\_demo.docm** in this lesson's Learning Activity Resources.

## Instructions

The following are the general tasks that you must perform during this try-it:

1. When opening the file, enable the macros.
2. Use the **Macro** list to run the **Welcome** macro.
3. Use the **Macro** list to run the **Demo** macro.
4. In the next paragraph after the sentence ending in **...using macros**, enter and select the sentence **I love macros**, then run the Format\_Macro macro from the **Macro** list.
5. Discuss your observations with a classmate.

## Topic 2: Record a new simple macro



As you learned when creating the previous sample macro, you can use macros for a variety of tasks. You also can save time on tasks that you do often by bundling the steps into a macro.

## Record a macro

1. From the **View** tab, **Macros** group, select **Macros**, then choose **Record Macro...**, as depicted in the following screenshot.

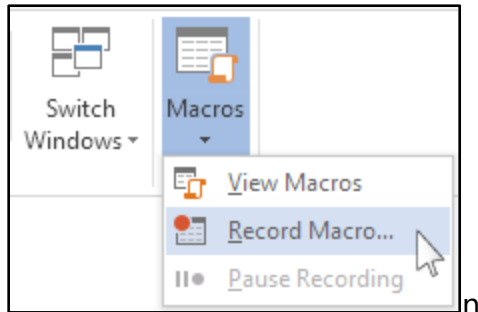


Figure 3: The **Record Macro** option

2. From the **Record Macro** dialog box in the **Macro name** box, enter a name for the macro, as depicted in the following screenshot.

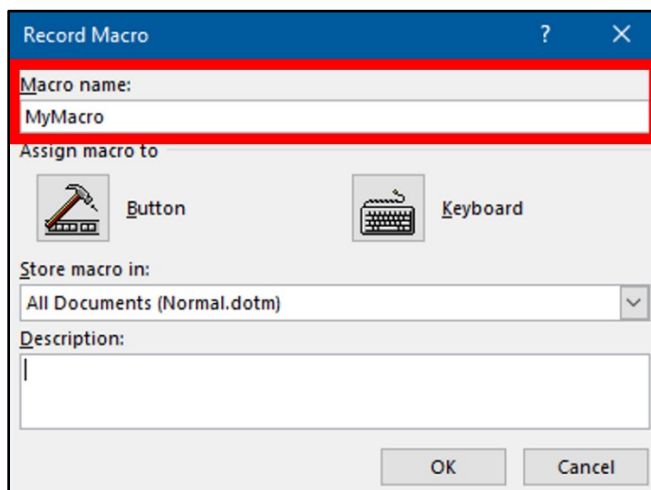


Figure 4: The **Macro name** option, in the **Record Macro** dialog box

3. To use this macro in any new document, in the Store macro in box, select **All Documents (Normal.dotm)**, as depicted in the following screenshot.

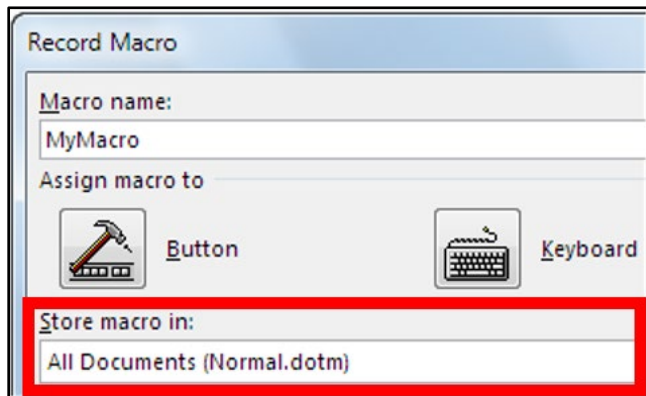


Figure 5: The **Record Macro** dialog box, with the **Store macro in** option

4. Select **OK** to begin recording your macro.
5. Record the steps in your macro by selecting the commands or entering the text for each step in the task. Word records your actions.
  - Use the keyboard to select text, by using the SHIFT+arrow keys, while you are recording your macros. Macros don't record selections made with a mouse or other pointing device.
6. When you have completed the steps in your macro, to stop recording, select the **View** tab, from the **Macros** group, select **Macros** then **Stop Recording**, as depicted in the following screenshot.

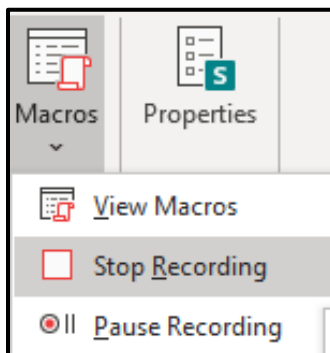


Figure 6: The **Stop Recording** option

7. Access the macro in the **Macros** list from the **View** tab, **Macros** group, then select **View Macros**. In the list under **Macro** name, select the macro.

## Record a macro with a button

1. From the **View** tab, **Macros** group, select **Macros**, then choose **Record Macro...**, as depicted in the following screenshot.

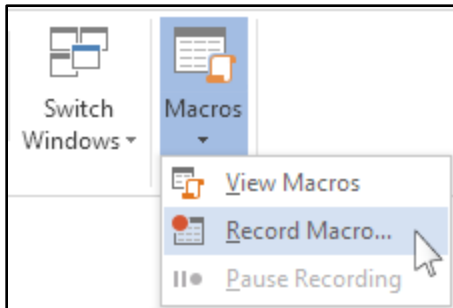


Figure 7: The **Record Macro** option

2. From the **Record Macro** dialog box, in the **Macro name** box, enter a name for the macro, as depicted in the following screenshot.

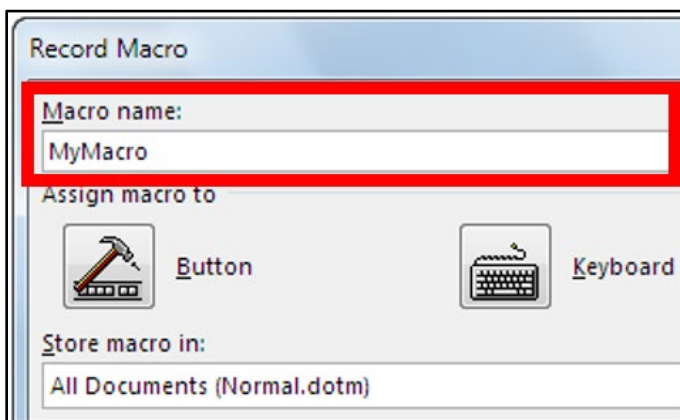


Figure 8: The **Macro** name box

3. To use this macro in any new document, in the Store macro in box, select **All Documents (Normal.dotm)**, as depicted in the following screenshot.

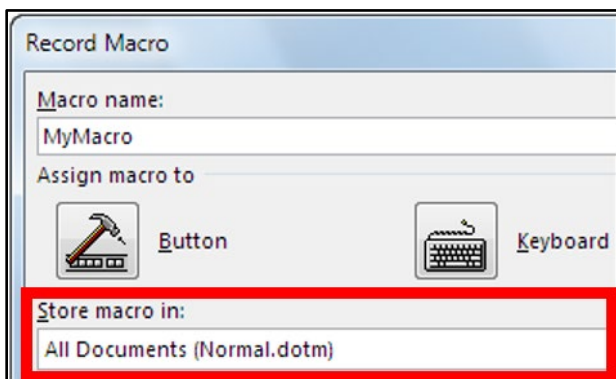


Figure 9: The **Store macro in:** box

4. In the **Assign macro to** area, select **Button**, as depicted in the following screenshot.



Figure 10: The **Button** icon

5. Select the new macro (example: **Normal.NewMacros.<your macro name>**), then select **Add**, as depicted in the following screenshot.

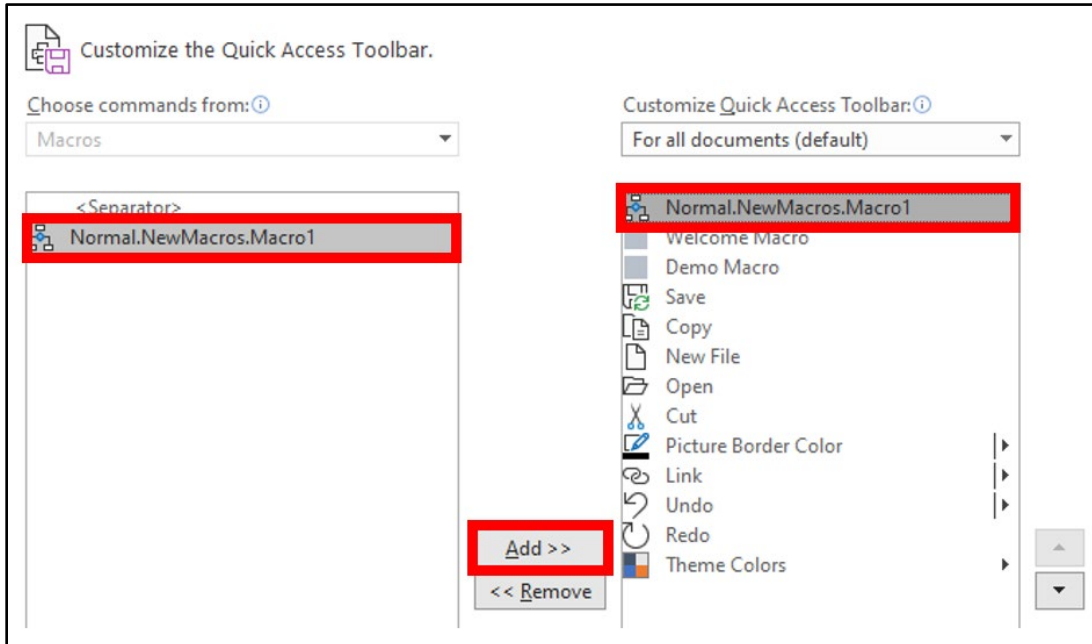


Figure 11: The **Customize the Quick Access Toolbar** options

6. Select **Modify**, as depicted in the following screenshot.

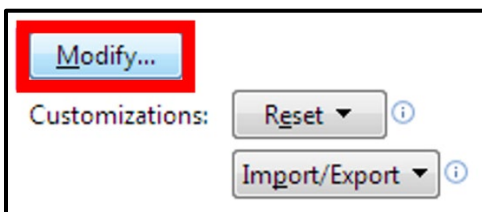


Figure 12: The **Modify** option on the **Quick Access Toolbar**

7. In the **Modify Button** dialog box, select a symbol.
8. In the **Display name** box, enter a name for your macro.
9. Select **OK**.



10. Select **OK** again to exit the **Customize the Quick Access Toolbar** window, as depicted in the following screenshot.

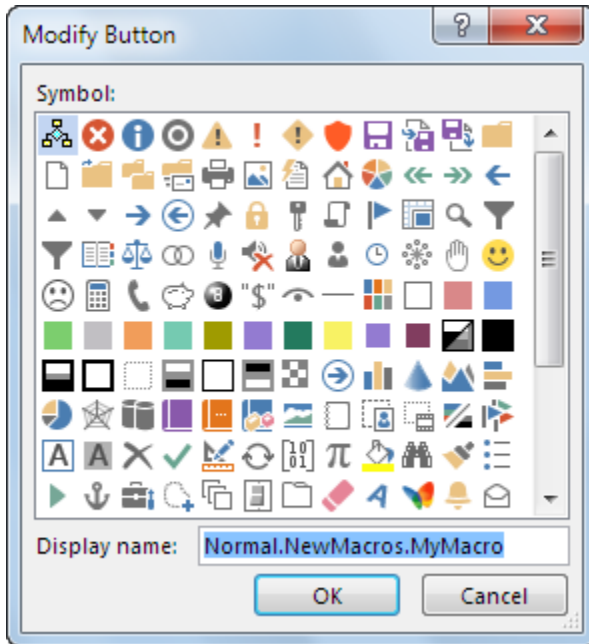


Figure 13: The **Modify Button** options

11. Record the steps in the macro by selecting the commands or entering the text for each step in the task. Word records your actions.
  - Use the keyboard to select text, by using the SHIFT+arrow keys, while recording macros. Macros don't record selections made with a mouse or other pointing device.
12. When the steps in the macro are complete, to stop recording, go to the **View** tab, **Macros** group, select **Macros** and then **Stop Recording**, as depicted in the following screenshot.

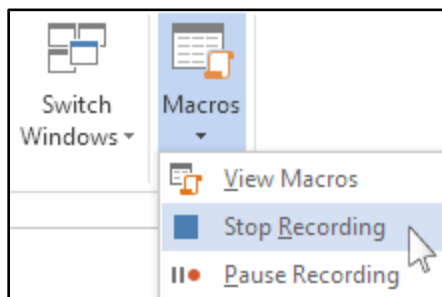


Figure 14: The **Stop Recording** option

13. The button for your macro appears on the **Quick Access Toolbar**.



Figure 15: The **Macro** button on the **Quick Access Toolbar**

14. To run the macro, select the button from the **Quick Access Toolbar**.

## Record a macro with a keyboard shortcut

1. From the **View** tab, in the **Macros** group, select **Record Macro**, as depicted in the following screenshot.

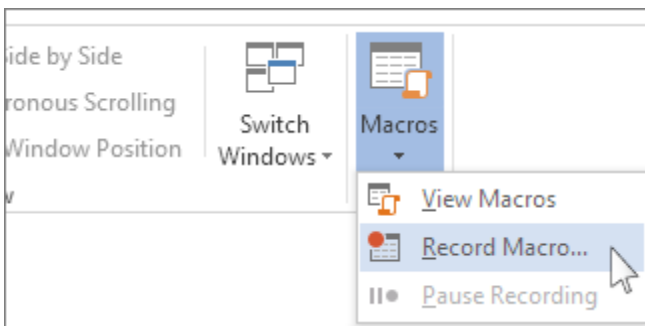


Figure 16: The **Record Macro** option

2. From the **Record Macro** dialog box in the **Macro name** box, enter a name for the macro, as depicted in the following screenshot.

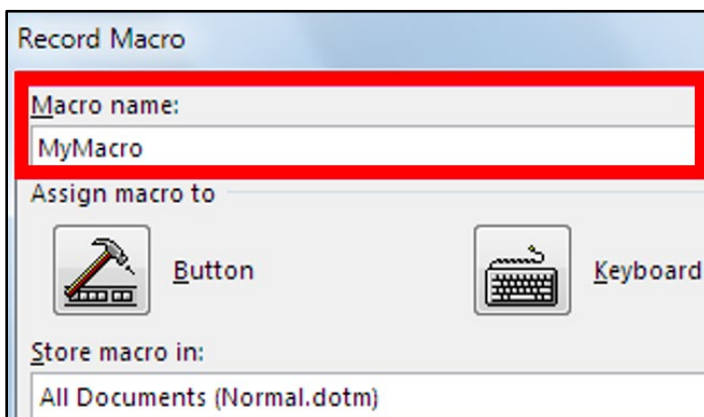


Figure 17: The **Macro name** box

3. To use this macro in any new document, in the **Store macro in** box, select **All Documents (Normal.dotm)**, as depicted in the following screenshot.

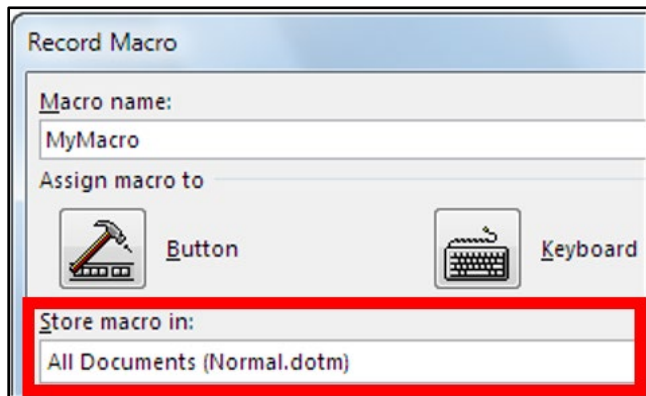


Figure 18: The **Store macro in** options

4. In the **Assign macro to** area, select **Keyboard**, as depicted in the following screenshot.

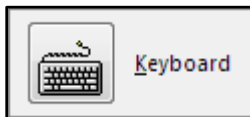


Figure 19: The **Keyboard** button

5. Select a combination of keys in the **Press new shortcut key** box, as depicted in the following screenshot.

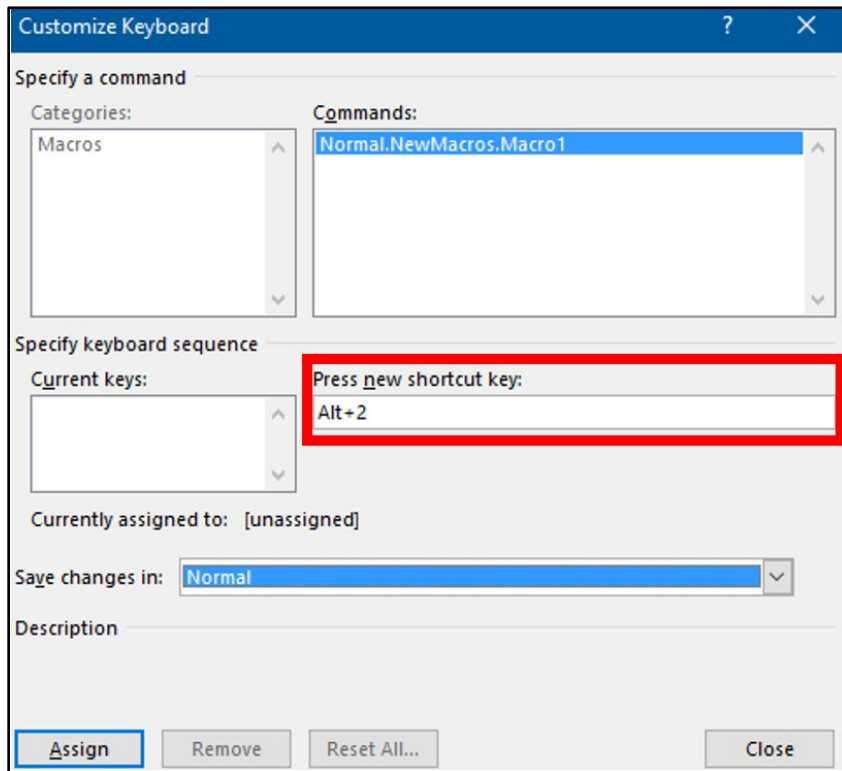


Figure 20: The **Customize Keyboard** dialog box

6. Check whether that combination is already assigned to something else. If it's assigned, try a different combination.
7. To use this keyboard shortcut in any new documents, be sure the **Save changes in** box displays **Normal.dotm**.
8. Select **Assign**.
9. Record the steps in the macro by selecting the commands or entering the text for each step in the task. Word records your actions.
  - Use the keyboard to select text, using SHIFT + arrow keys, while recording macros. Macros don't record selections made with a mouse or other pointing device.

10. When the macro steps are complete, to stop recording, go to the **View** tab, **Macros** group, and select **Macros** then **Stop Recording**, as depicted in the following screenshot.

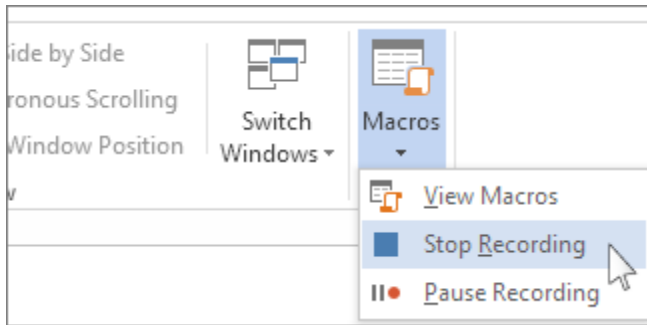


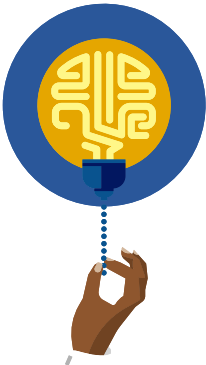
Figure 21: The **Stop Recording** option

11. To run the macro, use the keyboard shortcut keys.



#### Additional information

To review the additional information on running a macro, go to:  
[Create or run a macro](#)



#### Did you know?

You can create a macro to run from a custom ribbon group.

## Activity: Show me how

In this activity, follow the teacher demonstration of recording macros to run from the macros list, the keyboard, and the **Quick Access Toolbar**.

### Resources required

- None

## Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrating how to record macros.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Record a new simple macro



In this leveled try-it activity, you'll record and run macros.

### Try-it 1

In this try-it, you'll record macros: one to run from the macro list and one from a keyboard shortcut.

### Resources

You'll need the following resources for this try-it:

- None

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Record a macro to run from the macro list that will create a header with your name to the left, the class name in the center, and the date that updates automatically to the right, then close the **Header and Footer** toolbar.
3. Record a macro to run from a keyboard shortcut that will create a footer with the page numbers in the center, then close the **Header and Footer** toolbar.
4. Test your macros to ensure that they run properly.
5. Save the document and keep it open for the next topic.

### Try-it 2

In this try-it, you'll record macros: one to run from the macro list, one to run from a keyboard short cut, and one to run from a button.

## Resources

- None

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Record a macro to run from the macro list that will create a header with your name to the left, the class name in the center, and the date that updates automatically to the right, and then close the **Header and Footer** toolbar.
3. Record a macro to run from a keyboard shortcut that will create a footer with the page numbers in the center, and then close the **Header and Footer** toolbar.
4. Record a macro to run from a button on the **Quick Access Toolbar** that will select all the text entered in your document, and then format text to your liking.
5. Save the document and keep it open for the next topic.

## Try-it 3

In this try-it, you'll record macros: one to run from the macro list, one to run from a keyboard short cut, one to run from a button, and one to run from a custom ribbon group.

## Resources

- None

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Record a macro to run from the macro list that will create a header with your name to the left, the class name in the center, and the date that updates automatically to the right, and then close the **Header and Footer** toolbar.
3. Record a macro to run from a keyboard shortcut that will create a footer with the page numbers in the center, and then close the **Header and Footer** toolbar.
4. Record a macro to run from a button on the **Quick Access Toolbar** that will format text to your liking.

5. Record a macro to run from a button in a custom ribbon group that will insert a **Quick Part**.
6. Save the document and keep it open for the next topic.

## Topic 3: Save a macro-enabled document



From the beginning of this course, you've opened documents that contain macros. Anytime that you create a macro that you would like to share in the document, you must make sure to save the document with the macros enabled. After the recipient opens the document and enables the macros, they can use the macros created.

To save a macro-enabled macro, from the **File** tab, select **Save as**, and from the document type list, select **Word Document (\*.docm)**, as depicted in the following screenshot.

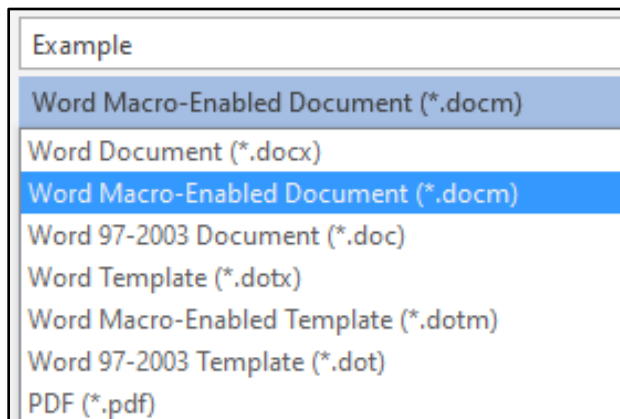


Figure 22: Options for saving a macro-enabled document

### Activity: Pose a challenge

In this activity, you'll determine the steps required to save a macro-enabled file.

#### Resources required

- None



## Activity instructions

Participate in the activity by following these instructions:

1. Think about when you opened a macro-enabled document and when you have saved documents in another file format.
2. Determine the steps required to save a macro-enabled document.
3. Share your ideas with a classmate.
4. Be prepared to share with the class.

## Try-it: Save a macro-enabled document



In this standalone try-it activity, you'll save a document as a macro-enabled document.

## Resources

- None

## Instructions

The following are the general tasks that you must perform during this try-it:

1. Open a blank document.
2. Save your document as a macro-enabled document.
3. Close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. Macros can be assigned to run from:  
*Select all that apply.*
  - a. The Macros list.
  - b. A keyboard shortcut.
  - c. A button on the **Quick Access Toolbar**.
  - d. A button on a custom ribbon group.

2. To record selecting text, you must select the text by using \_\_\_\_\_.

*Fill in the blank space.*

3. To record macros, you can use the \_\_\_\_\_ tab or the \_\_\_\_\_ tab.

*Fill in the blank spaces.*

# Lesson 2: Editing and copying macros

## Overview

In this lesson, you'll learn how to edit and copy a simple macro. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts that you learn.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. Macros are created by using which programming language?

*Select the correct option.*

- a. HTML
- b. CSS
- c. Visual Basic
- d. Java

2. You can access the macro security settings from which tabs?

*Select all that apply.*

- a. **File**
- b. **Insert**
- c. **View**
- d. **Developer**

3. You can open the **Visual Basic Editor** directly from which tab?

*Select all that apply.*

- a. **Insert**
- b. **Design**
- c. **Developer**
- d. **Review**

# Topic 1: Edit simple macros



What if you've created a macro that you use to format your documents by using your favorite text-formatting options, and then change your mind on the text size or color? Instead of recording a new macro, you can edit the macro.

1. From the **View** tab, **Macros** group, select **View Macros**, as depicted in the following screenshot.

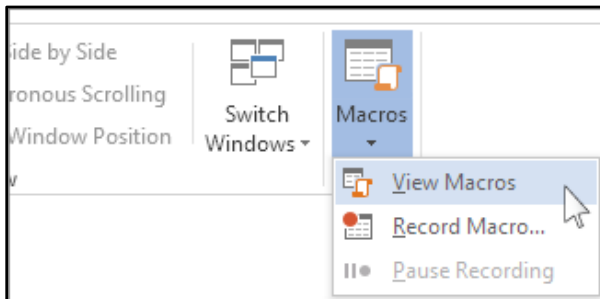


Figure 23: The **View Macros** option

2. From the **Macros** dialog box, select **Edit**, as depicted in the following screenshot.

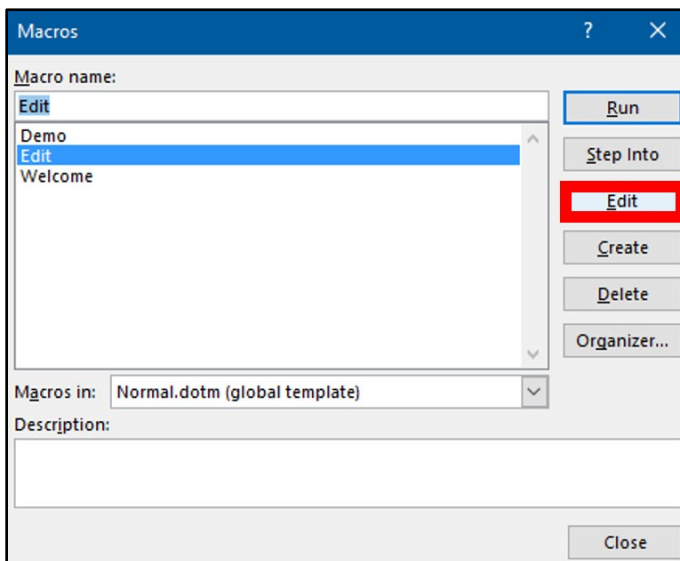


Figure 24: The **Edit macro** option

3. A **Microsoft Visual Basic for Applications** window will open. Locate the macro from the list by identifying the macro name next to the **Sub** command (example: **Sub Demo ( )**).
4. Review the code and make the changes that you wish.

You don't need to know **Visual Basics for Applications** to edit a simple macro. Read through each line then identify the steps to edit.

This is example code for setting the font to Arial Rounded MT Bold:

- **Selection.Font.Name = "Arial Rounded MT Bold"**

To change the font, change the name in the code, as in this example:

- **Selection.Font.Name = "Segoe UI"**



#### Additional information

To review additional information on **Visual Basics for Applications**, go to: [Getting started with VBA in Office](#)

---

## Activity: Show me how

In this activity, complete the step-by-step demonstration as your teacher describes how to edit a simple macro.

### Resources required

You'll need the following resources for this activity:

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Create a simple macro by following your teacher's demonstration.
2. Review the code in the **Microsoft Visual Basic for Applications** window.
3. Edit the lines of code by following your teacher's demonstration.
4. Close the **Microsoft Visual Basic for Applications** window.
5. Run the macro to check your changes.
6. Ask the teacher clarifying questions.
7. Participate in the discussion.

## Try-it: Edit simple macros



In this leveled try-it activity, you'll review and edit macro VBA code.

## Try-it 1

In this try-it, you'll record a simple macro, then edit it in VBA.

### Resources

- None

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Record a simple macro in the current document only.
2. Edit the code.
3. Run the macro to check your results.
4. Save as a macro-enabled document and keep the document open for the next topic.

## Try-it 2

In this try-it, you'll review an existing macro code to determine the outcome.

### Resources

You'll need the following resources for this try-it:

- Open **L2\_T1\_try2\_starter.docm** in this lesson's Learning Activity Resources.

### Instructions

The following are the general tasks that you must perform during this try-it:

1. Go through the macro code before running the macro.
2. Determine what you think will happen when you run the macro.
3. Share your thoughts with a classmate.
4. Run the macro.
5. Return to the macro code and make a few edits.
6. Run the macro to check your results.
7. Save the document and keep it open for the next topic.

## Topic 2: Copy macros to documents and templates



As you've learned so far, you can create a macro that is available in a specific document or in the normal template. What would you do if you have a macro that is available in one document but want to use it in another document or even in all documents that you create? Word provides a copy option for macros.

### Copy macros from the Organizer

1. From the **View** tab, **Macros** group, select **View Macros**, as depicted in the following screenshot.

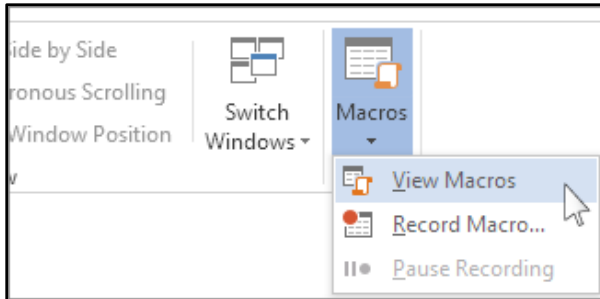


Figure 25: The **View Macros** option

2. From the **Macros** dialog box, select **Organizer**, as depicted in the following screenshot.

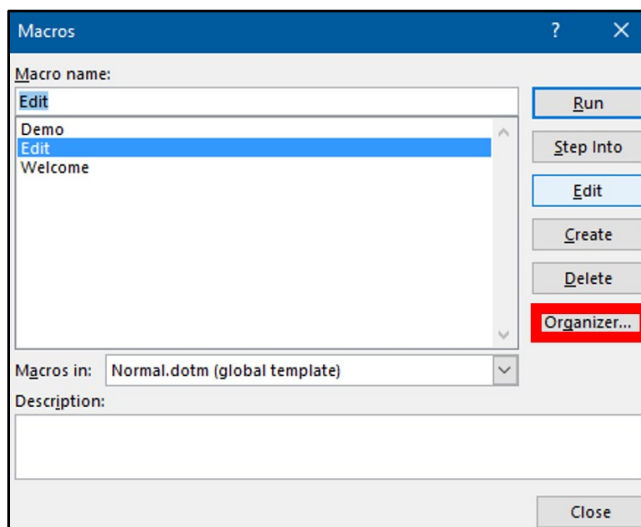


Figure 26: The **Organizer** option

3. From the **Organizer dialog** box, **Macro Project Items** tab, select the file that you want to copy the macro from by using the drop-down menu under the **Macro Project Items available in:**.
4. Then select the file you want to copy the macro to by using the drop-down menu under the second **Macro Project Items available in:**.
5. Select the **Macro Project item** from the first document, select **Copy**, then **Close**. The screenshot below depicts the Demo document copying the **NewMacros** to the Sample document, as depicted in the following screenshot.

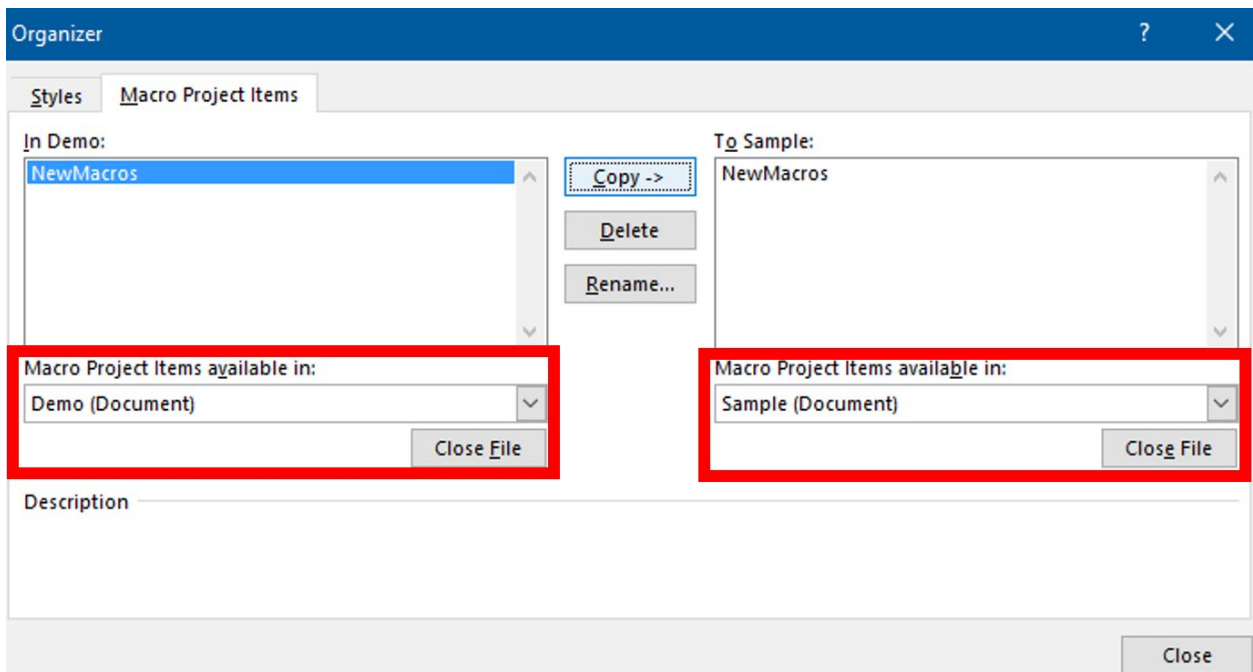


Figure 27: The **Copying Macros** dialog box

## Copy a module from Visual Basic Editor

1. On the **Developer** tab, select **Visual Basic** to open the **Visual Basic Editor**.
2. In the **Visual Basic Editor**, from the **View** menu, select **Project Explorer**.
3. In the **Project Explorer** pane, copy the module containing the macro that you want to the destination document or template, as depicted in the following screenshot.



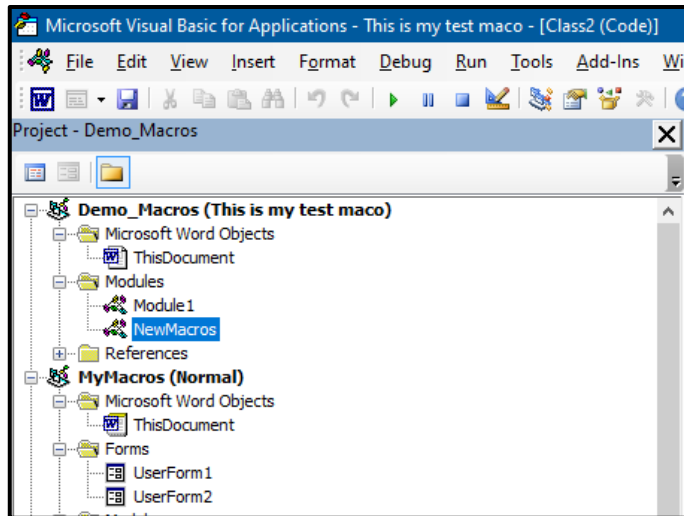


Figure 28: The **Project Explorer** pane

## Activity: One step back, two forward

In this activity, you'll work with a partner to determine the steps required to copy macros from one document to another by using the **Organizer**, and then observe your teacher demonstrate copying macros from the **Visual Basic Editor**.

### Resources required

- None

### Activity instructions

Participate in the activity by following these instructions:

1. Think back to when you copied styles from one document to another.
2. Explore the **Organizer** dialog box by going to the **View** tab, **Macros** group, and selecting **View Macros**.
3. Then determine the steps required to copy the macros from one document to another.
4. Be prepared to share your ideas with the class.
5. Observe as your teacher demonstrates how to copy macros from the **Visual Basic Editor**.
6. Ask the teacher clarifying questions.
7. Participate in the discussion.

## Try-it: Copy macros to documents and templates



In this leveled try-it activity, you will copy macros from one document to another.

### Try-it 1

In this try-it, you'll copy macros from one document to another by using the **Organizer**.

#### Resources

You'll need the following resources for this try-it:

- The file from the previous try-it or open the **L2\_T2\_try1\_starter.docm** in this lesson's Learning Activity Resources.

#### Instructions

The following are the general tasks that you must perform during this try-it:

1. Create a new document.
2. Copy the macros from your file to the new document by using the **Organizer**.
3. Save and close the documents.

### Try-it 2

In this try-it, you will copy macros from one document to another by using the **Visual Basic Editor**.

#### Resources

You'll need the following resources for this try-it:

- The file from the previous try-it or open the **L2\_T2\_try2\_starter.docm** in this lesson's Learning Activity Resources.

#### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a new document.
2. Copy the macros from your file to the new document by using the using the **Visual Basic Editor**.
3. Save and close the documents.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. You can copy a macro to:

*Select all that apply.*

- a. .docx
- b. .docm
- c. .txt
- d. .dotm

2. You can edit a macro from \_\_\_\_\_ or \_\_\_\_\_.

*Fill in the blank spaces.*

3. What is an example of VBA code? \_\_\_\_\_.

*Fill in the blank space.*

# Glossary

<b>Macro</b>	A series of commands and instructions that you group together as a single command to accomplish a task automatically.
<b>Visual Basic</b>	A Microsoft event-driven programming language.

*Table 2: Glossary terms and definitions*

# Cornerstone

## Overview

In this Cornerstone, you'll create and edit macros in a document, add the new macros to a keyboard shortcut button, and then make them available from the **Quick Access Toolbar** and a custom ribbon group.

## Objectives

The following table outlines the Cornerstone objectives and their corresponding MOS exam objectives.

Create macros in a new document	<ul style="list-style-type: none"> <li>• 4.2.1: Record simple macros</li> <li>• 4.2.2: Name simple macros</li> </ul>
Edit existing macros	<ul style="list-style-type: none"> <li>• 4.2.3: Edit simple macros</li> </ul>
Copy the macros to another document	<ul style="list-style-type: none"> <li>• 4.2.4: Copy macros to other documents or templates</li> </ul>

*Table 3: Cornerstone objectives*

## Duration

50 minutes

## Instructions

1. Complete the tasks for each file.
2. When saving your file, add your name to the end of the filename; for example, **Background\_Espino**. Follow your teacher's directions for where to save your files.
3. When you're done with the Cornerstone, assess your completion and enter the points you think you earned within the task lists below. You can ask your teacher for help if you need it.

# Tasks

In this Cornerstone, you'll work with one file with six tasks.

## File 1: Cornerstone\_recipe\_starter.docx

### Task: Record a button macro (6 points)

1. Record a button macro named **Cornerstone** in the normal template that includes each of the following tasks: (5 points) (Exam objective 4.2.1 and 4.2.2)
  - a. Create a new document.
  - b. Paste the text that you select from the **cornerstone\_recipe\_starter.doc** file.
  - c. Select all text and format it with **Arial font, 16pt, Bold**.
2. Run your macro. (1 point) (Exam objective n/a)

Points scored: \_\_\_\_\_ / 6

### Task: Edit a macro (3 points)

1. Edit the **Cornerstone** macro to change the font to size **14 pt**. (1 point) (Exam objective 4.2.3)
2. Edit the **Cornerstone** macro to add the code **Selection.Font.Color = RGB(20, 230, 0)**. (1 point) (Exam objective 4.2.3)
3. Run your macro. (1 point) (Exam objective n/a)

Points scored: \_\_\_\_\_ / 3

### Task: Add the macro button to the ribbon (3 points)

- Create a custom ribbon group and add your macro button. (3 points) (Exam objective n/a)

Points scored: \_\_\_\_\_ / 3

### Task: Record a macro (6 points)

1. Record a keyboard shortcut macro named **header** in the current document only that includes each of the following tasks: (5 points) (Exam objective 4.2.1 & 4.2.2)
  - a. Inserts the header with the text **Munson's Pickles and Preserves Farm**.
  - b. Inserts the current date in the footer.
2. Run your macro. (1 point) (Exam objective n/a)

Points scored: \_\_\_\_\_ / 6

### Task: Edit a macro (3 points)

1. Edit the **header** macro to change the text to **Munson's Pickles and Preserves Farm Featured Recipes**. (1 point) (Exam objective 4.2.3)
2. Edit the header macro to change the font, size, and color that you desire. (1 point) (Exam objective 4.2.3)
3. Run your macro. (1 point) (Exam objective n/a)

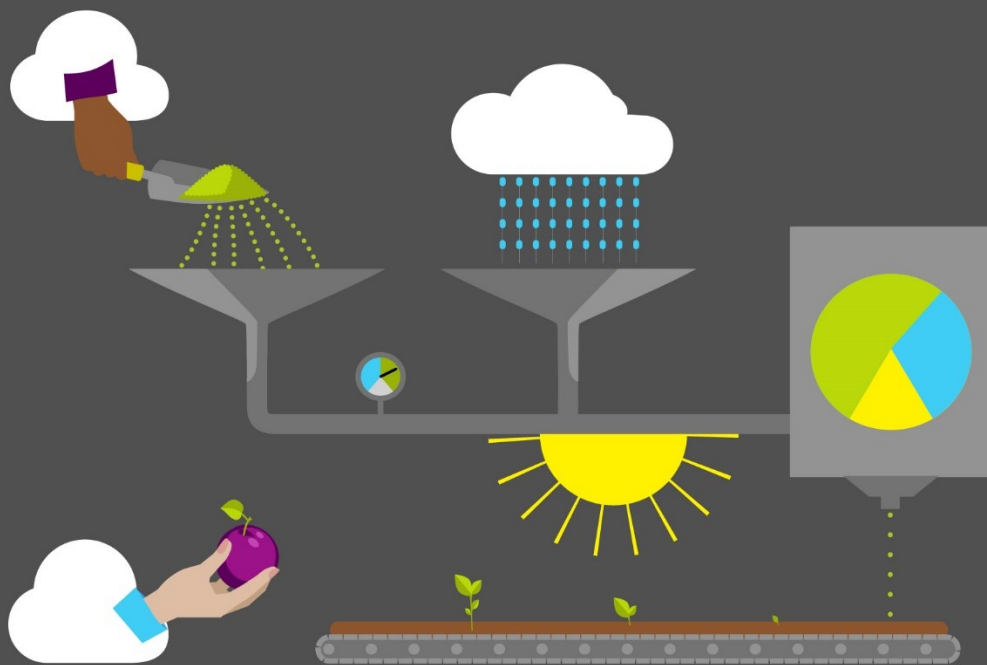
Points scored: \_\_\_\_\_ / 3

### Task: Copy a macro (3 points)

- Copy the **header** macro to the **Normal Template**. (3 points) (Exam objective 4.2.4)

Points scored: \_\_\_\_\_ / 3

FILE 1 TOTAL POINTS: \_\_\_\_\_ / 24



# Student Guide

40570A

Microsoft Word expert 2019

Module 7: Managing customer lists and creating mailings

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# Module overview

## Description

Now that you've learned about templates, styles, macros and other advanced formatting, you can use those skills to create an amazing main document to use in a mail merge. This module consists of three lessons that help you learn how to use an advanced feature of Microsoft Word called mail merge. By the end of this module, you'll be able to update a recipient list; insert merge fields; and create a merged letter, merged labels, and merged envelopes.

The following table outlines the lessons in this module and their corresponding learning objectives.

Lesson	Learning objective	Exam objectives
Creating a mail merge document	Merge new documents based on source documents	<ul style="list-style-type: none"> <li>• 4.3.2</li> <li>• 4.3.3</li> </ul>
Adding and editing source documents	Add information to an existing source document and edit it	<ul style="list-style-type: none"> <li>• 4.3.1</li> </ul>
Creating merged documents	Merge a mail document with a data source	<ul style="list-style-type: none"> <li>• 4.3.4</li> </ul>
Cornerstone: Printing mailing list labels and envelopes	Create a mail merge document for labels and envelopes by using merge fields and then preview the results	<ul style="list-style-type: none"> <li>• 4.3.1</li> <li>• 4.3.2</li> <li>• 4.3.3</li> <li>• 4.3.4</li> </ul>

*Table 1: Objectives by lesson*

## Scenario

Munson's Pickles and Preserves Farm has asked you to update a list of their community supported agriculture (CSA) program customers in a Microsoft Excel workbook. The farm plans to send a monthly newsletter to these customers. Many customers chose to receive the newsletter via email, whereas others chose to have a physical copy mailed to them.

You'll update the existing customer list by adding new customers, editing existing customer details, and filtering the information in preparation for the next newsletter mailing.

## Cornerstone

The newsletter is ready to go! For the customers who want to receive it by mail, you need to create mailing labels. You feel that creating a mail merge document by using the up-to-date customer list is the most efficient way to create the labels. The Marketing department has asked that you also create a mail merge document for printing envelopes so they can mail flyers to the customers.

# Lesson 1: Creating a mail merge document

## Overview

In this lesson, you'll learn how to use an existing main document and source document and then merge fields to create individual, personalized documents through a process called mail merge. You'll participate in discussions and step-by-step demonstrations, and you'll have opportunities to put into practice what you learn along the way.

**Note:** For all the try-its in this lesson, you can either use the starter files that are provided or save and use the same merged document that you created in the first topic.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. What's the document called that has the information to go in every letter or report?

*Select the correct option.*

- a. The source document
- b. The duplicate document
- c. The normal document
- d. The main document

2. What are the column titles for the information available in a source document called that become the merge fields?

*Select the correct option.*

- a. Titles
- b. Rows
- c. Names
- d. Headings

3. A \_\_\_\_\_ is a field that inserts personalized information from the source document.

*Fill in the blank space.*

## 4. What's a group of merge fields called?

Select the correct option.

- a. A merge field block
- b. A merge group
- c. A merge family
- d. A merge sequence

## Topic 1: Insert merge fields



Have you ever had to create individual invitations or thank you letters and address the envelopes? It can be a time-consuming task, indeed! In this topic, you'll learn the fundamentals of an advanced Word feature called mail merge. With mail merge, you can use a document and an Excel list, a database, or a set of Microsoft Outlook contacts to quickly create personalized documents with a professional appearance.

## Use mail merge for bulk email, letters, labels, and envelopes

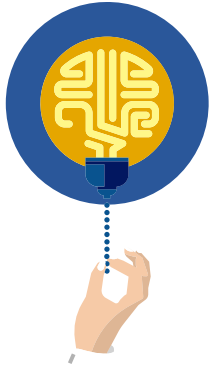
With mail merge, you can create a batch of documents that are personalized for each recipient. For example, you might want to personalize a form letter to address each recipient by name. To do so, you first need to understand some terms. A *data source* is a list, spreadsheet, or database associated with a main document. Placeholders in the main document, called *merge fields*, instruct Word to include information in the main document from the data source, as the following screenshot depicts.

	A	B	C
1	First Name	Last name	Address 1
2	Amal	Padilla	234 Main Street
3	Andree	Meilleur	789 Elm Street
4	Charline	Varieur	4567 Pine Avenue
5	Felipe	Bui	456 College Street

Amal Padilla  
234 Main Street

Figure 1: A data source

You work in the main document in Word and insert merge fields for the personalized content you want to include. When the mail merge is complete, the mail merge document generates a personalized version of the document with each name from the data source.



### Did you know?

You can also complete a mail merge by using the **Step-by-Step Mail Merge Wizard**, which you can find by going to the **Mailings** tab and then selecting **Start Mail Merge**.



### Additional information

For more information, refer to: [Create a directory of names, addresses, and other information](#) and [Use Outlook contacts as a data source for a mail merge](#)

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## Choose a data source

Your first step in setting up a mail merge is choosing the data source to use for the personalized information. People most commonly use Excel spreadsheets and Outlook contact lists as data sources, but you can use any database. If you don't have a data source, you can create it in Word as part of the mail merge process.

### Use an Excel spreadsheet as a data source

Here are five tips for preparing your Excel spreadsheet for a mail merge:

- Make sure the column names in your spreadsheet match the field names you want to insert into your main document. For example, to address readers by their first names in your document, you'll need separate columns for first and last names in your spreadsheet.
- Note that during the connection to the source document, Word will prompt you to select which sheet you want to pull information from.
- Make sure you've correctly formatted any data entries with percentages, currencies, and postal codes in the spreadsheet so that Word can properly read their values.

- Complete any changes or additions to your spreadsheet before Word connects it to your mail merge document.
- If you need to edit the source document, make sure to save and close it before opening the main document.

## Use the Mailings tab to do a mail merge

The **Mailings** tab has the commands for customizing and running your mail merge. The commands appear in the order you need to run them. If the commands are not available, you don't have a source document connected.

### Create a mail merge document with an existing source document

1. Open an existing Word document or a new blank one.
2. On the **Mailings** tab, select **Start Mail Merge**, and then select the type of document you want to create, as the following screenshot depicts.

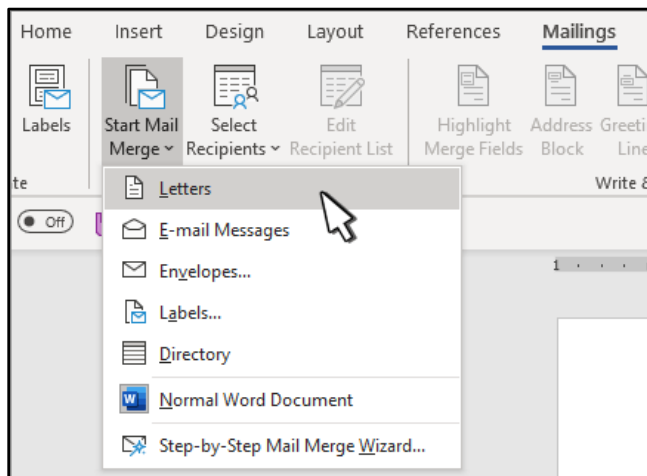


Figure 2: The **Start Mail Merge** menu

3. Select **Select Recipients > Use an Existing List** to connect to your source document, as the following screenshot depicts.

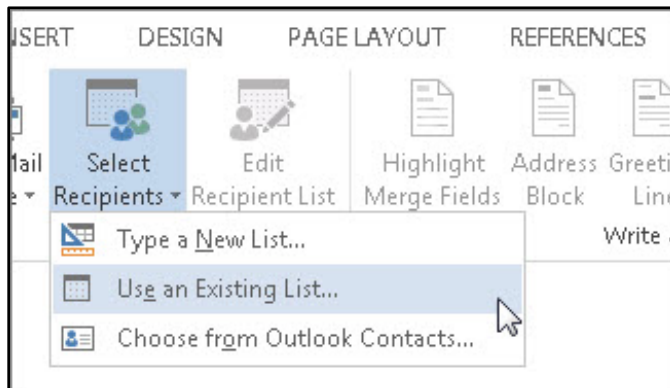


Figure 3: The **Select Recipients** menu

4. Navigate to the source document, select it, and then select **Open**.
5. Select which table you want to merge information from, and then select **OK**, as the following screenshot depicts.

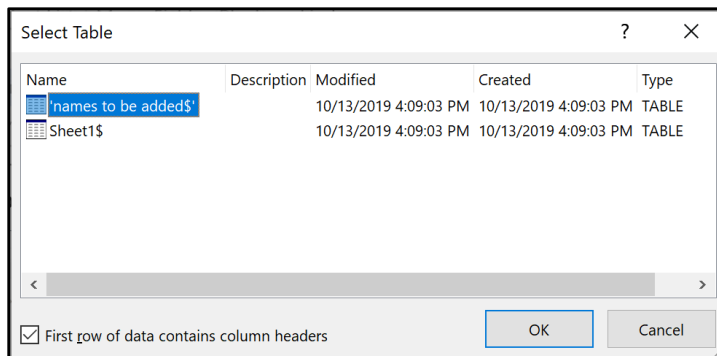
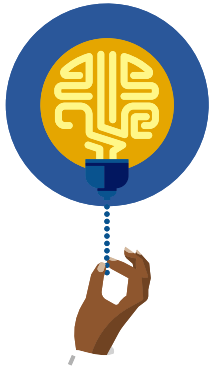


Figure 4: The **Select Table** dialog box

6. Note that all the commands are now available on the **Mailings** tab. The mail merge has connected the documents by using the headers, or column titles, in the source document to create merge fields to insert into the main document.





### Did you know?

If you don't have a source document, you can select **Select Recipients > Type a New List** to create a data source in Word.



### Additional information

For more information, refer to: [Data sources you can use for a mail merge](#)

---

## Add merge fields to a main document

1. Place the insertion point where you want to put the merge field in the main document.
2. Select **Insert Merge Field**, and then select the merge field you want, as the following screenshot depicts.

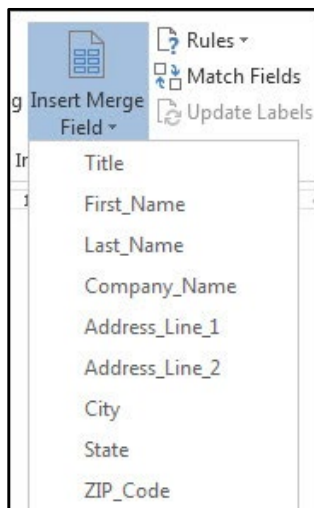


Figure 5: The **Insert Merge Field** menu

3. Remember that the merge fields match the column headers in the source document, and observe that Word inserts a merge field into the document.



### Additional information

For more information about merge field codes, refer to: [Insert, edit, and view fields in Word](#)

For more information about formatting your source document information prior to doing a mail merge, refer to: [Prepare your Excel data source for a Word mail merge](#)

For more information about how to set the rules for a mail merge, refer to: [Set the rules for a mail merge](#)

---

## Activity: Show and tell

In this activity, you'll learn how to use a mail merge and insert merge fields, and you'll discuss the benefits and uses of a mail merge.

### Resources

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher demonstrate how to use a mail merge.
2. Ask the teacher clarifying questions.
3. Participate in the discussion.

## Try-it: Insert merge fields



In this leveled try-it activity, you will use mail merge and insert merge fields and rules.

### Try-it 1

In this try-it, you'll create a mail merge document and insert three merge fields.

### Resources

You'll need the following resources for this try-it:

- **L1\_T1\_try1\_family\_day\_starter.docx** and **L1\_T1\_try1\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a mail merge by using **L1\_T1\_try1\_family\_day\_starter.docx** as the main document and **L1\_T1\_try1\_customers\_starter.xlsx** as the source document, and insert three appropriate merge fields.
2. Save and close the document.

## Try-it 2

In this try-it, you'll create a mail merge document and insert merge fields with rules.

## Resources

You'll need the following resources for this try-it:

- **L1\_T1\_try2\_family\_day\_starter.docx** and **L1\_T1\_try2\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a mail merge by using **L1\_T1\_try2\_family\_day\_starter.docx** as the main document and **L1\_T1\_try2\_customers\_starter.xlsx** as the source document, and insert five appropriate merge fields with at least one rule.
2. Save and close the document.

# Topic 2: Preview merge results



Did you notice that when you placed the merge fields in your document, Word displayed the field names as placeholders for your information? You should now preview the results so you can make any necessary changes to the document prior to the mail merge.

## Preview the results

In Word, you can preview the merge results:

1. On the **Mailings** tab, select **Preview Results**, as the following screenshot depicts.

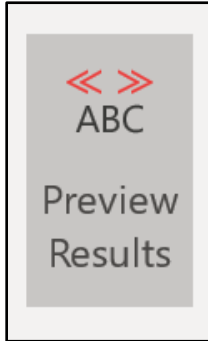


Figure 6: The **Preview Results** command

2. Note that the merge fields in your document display the personalized information from your source document. You can navigate through each personalized version by using the **Preview Results** navigation buttons, as the following screenshot depicts.

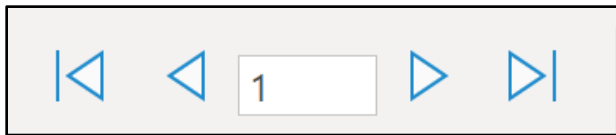


Figure 7: The **Preview Results** navigation buttons

3. Note that if you close your document with the **Preview Results** command selected, the next time you open the document, this command will still be selected. Sometimes, you might find it difficult to tell if your document is merged when **Preview Results** is selected. To know for sure, check if **Preview Results** is selected.

## Find a recipient

You use the **Find Recipient** command in the **Preview Results** group to search a large source document for a specified value in either all fields or a specified field. In the **Preview Results** group, select **Find Recipient**, as the following screenshot depicts.

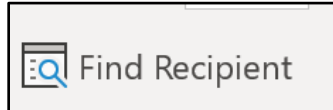


Figure 8: The **Find Recipient** command

1. In the **Find Entry** dialog box, enter your search criteria the in the Look in section choose your desired search field(s) as the following screenshot depicts.

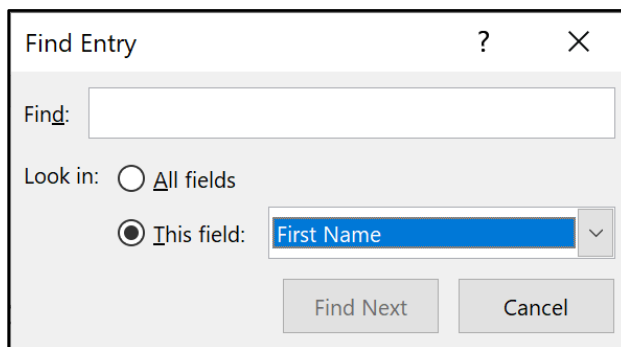


Figure 9: The **Find Entry** dialog box

## Use the Check for Errors command

With the **Check for Errors** command, you can search your document for simple code errors in your merge fields:

1. In the **Preview Results** group, select **Check for Errors**.
2. Select how you want Word to check for errors and report them, as the following screenshot depicts:

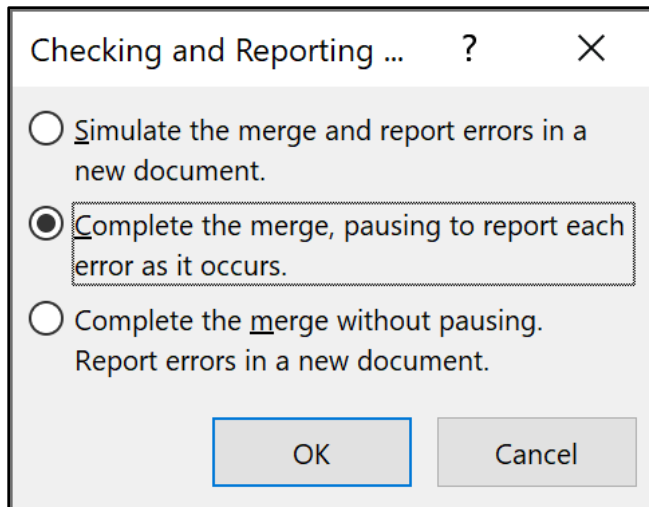


Figure 10: The **Checking and Reporting** dialog box

## Activity: Discuss and learn

In this activity, you'll learn how to preview your mail merge documents.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.

## Try-it: Preview merge results



In this standalone try-it activity, you'll preview your merge results to observe how the personalized information will appear in your document.

### Resources

You'll need the following resources for this try-it:

- **L1\_T2\_try\_family\_day\_starter.docx** and **L1\_T2\_try\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open the **L1\_T2\_try\_family\_day\_starter.docx merged document**.
2. Preview the mail merge, and then navigate through each recipient.
3. Turn off the preview results, and then change your document as needed.
4. Save and close the document.

## Topic 3: Insert merge field blocks



Now that you know how to do a mail merge and insert merge fields to personalize information, you can speed up the process by using merge field blocks—such as a greeting line or an address block. These predesigned blocks add multiple fields at once, saving you time from individually adding each field.

### Add a greeting line

1. Place your cursor where you want to add a greeting in your document.
2. On the **Mailings** tab, in the **Write & Insert Fields** group, select **Greeting Line**.
3. Choose the greeting line format you want to use then preview the results, as the following screenshot depicts.

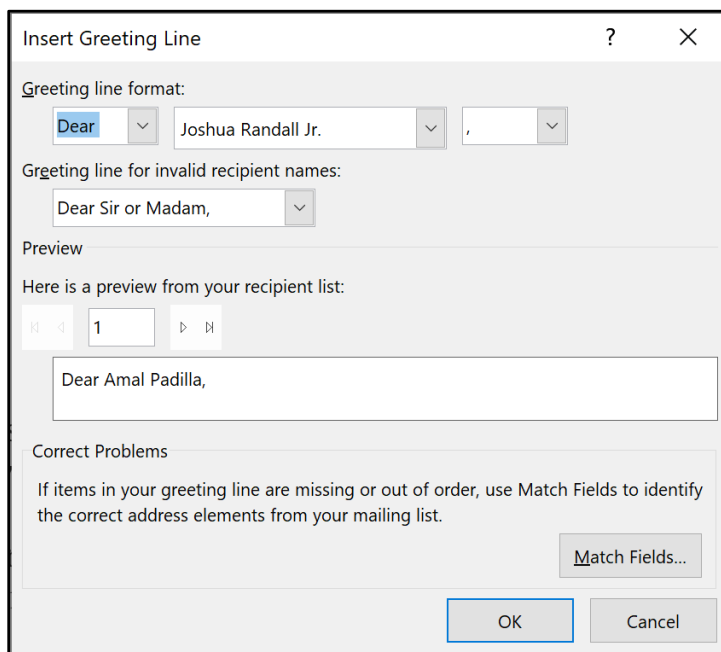


Figure 11: The **Insert Greeting Line** dialog box

## Add an address block

1. Place your cursor where you want to add an address block in your document.
2. On the **Mailings** tab, in the **Write & Insert Fields** group, select **Address Block**. Word gives you options for choosing the format of the recipient's name, as the following screenshot depicts.

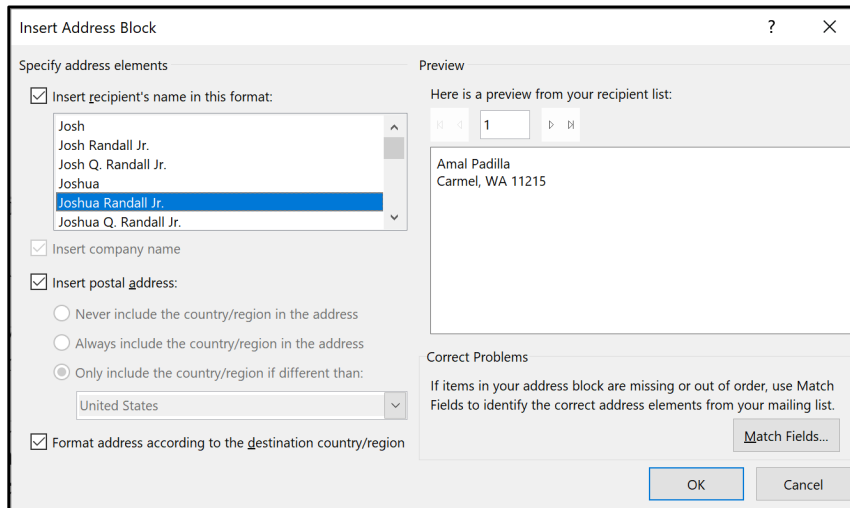


Figure 12: The **Insert Address Block** dialog box

## Correct unmatched merge fields

If you try to insert a merge field block and don't find the information you thought you would, unmatched or mismatched merge fields might exist.

Word automatically matches the headers in the source document with the merge field block as best it can. However, you might get a job title (such as **Manager**), for example, in the **Courtesy Title** field of the block, when a courtesy title (**Miss**, **Mrs.**, **Ms.**, or **Mr.**) is what you want.



To correct the merge field names from the source document so they match the merge fields in the address block:

1. In the **Insert Address Block** dialog box, select **Match Fields**. (Alternatively, on the ribbon, in the **Write & Insert Fields** group, select **Match Fields**.) The **Match Fields** dialog box displays, as the following screenshot depicts.

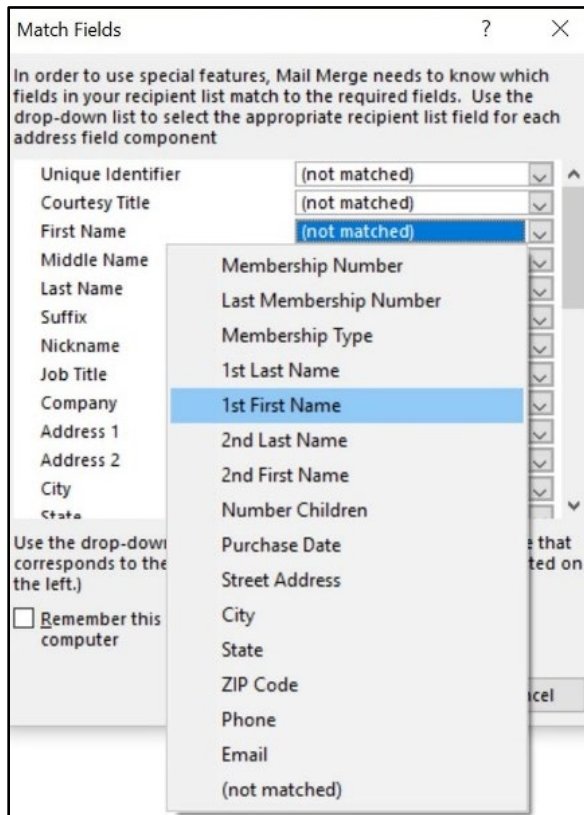
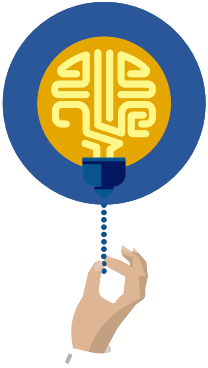


Figure 13: The **Match Fields** dialog box

2. Note that this dialog box lists the names of the address block fields. To match those that display a value of **(not matched)** with your field names, select each one's drop-down arrow, and then select the correct field name from the list that appears.
3. Select **OK**.

You can also use the **Match Fields** dialog box to remove unneeded fields. For example, if you don't want the address block to include a title, select its drop-down arrow, and then select **(not matched)**.



### Did you know?

Sending out invitations just got a whole lot easier! If your invitation fits in a printer, you can create a blank document in Word that duplicates your invitation with the areas you want to fill in from a mail merge.

---

## Activity: Pose a challenge

In this activity, you'll learn how to use merge field blocks and think about situations for which they'd be appropriate. Later, you can share your thoughts with your partner.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Think about how you inserted merge fields.
2. Explore how to insert merge field blocks, and describe when you'd use this technique.
3. Partner with a classmate, and share your ideas.

## Try-it: Insert merge field blocks



In this leveled try-it activity, you'll update your mail merge by inserting merge field blocks.

### Try-it 1

In this try-it, you'll create a merged document, insert various merge field block, and match the unmatched fields.

### Resources

You'll need the following resources for this try-it:

- **L1\_T3\_try1\_family\_day\_starter.docx** and **L1\_T3\_try1\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open the **L1\_T3\_try1\_family\_day\_starter.docx merged document**.
2. Delete the current merge fields, and then insert a greeting line.
3. Preview your results.
4. Save and close the document.

## Try-it 2

In this try-it, you'll create a merged document and insert a greeting line and an address block. You'll then match the unmatched fields in the merged document.

## Resources

You'll need the following resources for this try-it:

- **L1\_T3\_try2\_family\_day\_starter.docx** and **L1\_T3\_try2\_customers\_starter.xlsx** in this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open the **L1\_T3\_try2\_family\_day\_starter.docx** merged document.
2. Delete the current merge fields, and then insert a greeting line.
3. Add an address block, and make sure to match the **Address 1** field to the correct field from the recipient list.
4. Preview your results.
5. Save and close the document.

# Wrap-up

Use these questions to check what you learned in this lesson:

1. What is a field in a merge field block that incorrectly prints called?

*Select the correct option.*

- a. Missing
- b. Unmatched
- c. Failing
- d. Not something you can correct

2. The merge field blocks available in Word are:

*Select all that apply.*

- a. **City Block**
- b. **Greeting Line**
- c. **Address Block**
- d. **Mass Mailing Block**

3. Word maps the merge fields to the \_\_\_\_\_ in the source document.

*Fill in the blank space.*

4. When can you edit the source document?

*Select the correct option.*

- a. Only once when you create the document
- b. At any time
- c. Only when you preview the results
- d. Never

# Lesson 2: Adding and editing source documents

## Overview

In this lesson, you'll learn how to add information to an existing data source. You'll participate in discussions and collaborate with others, and you'll have opportunities to practice what you learn along the way.

**Note:** For all the try-its in this lesson, you can either use the starter files that are provided or continue using the merged document that you created in the first lesson.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. What does SQL stand for?

*Select the correct option.*

- a. Same Query Language
- b. Structured Query Language
- c. Super Quick Learning
- d. Standardized Query Language

2. You can't add recipients to the main document by:

*Select the correct option.*

- a. Selecting **Mail Merge > Edit Recipient**.
- b. Selecting **Start Mail Merge > Step-by-Step Mail Merge Wizard**.
- c. Editing an Excel spreadsheet.
- d. Using paragraph text in a Word document.

3. You can add headings to a source document by editing the \_\_\_\_\_

*Fill in the blank space.*

# Topic 1: Add information to a source document within Word



Often, when you do a mail merge, information in the source document needs to change. You need to add new people to the list, or people change their address, phone number, or position. In this lesson, you'll learn how to add recipients by using the **Edit Recipient List** command on the **Mailings** tab.

## Access the Mailings tab in Word

Many command groups on the **Mailings** tab are available only when the main document is connected to a source document. While you're opening a connected document, a dialog box appears that asks you to accept a SQL command, as the following screenshot depicts.

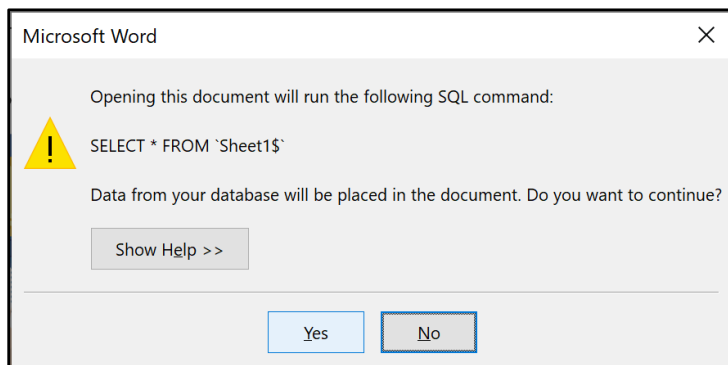
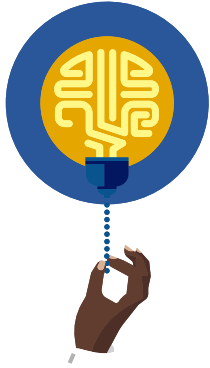


Figure 14: The dialog box asking you to accept a SQL command

This dialog box also names the sheet that your document is connected to.

The dialog box includes two buttons:

- **Yes.** Opens the main document and runs the SQL command, which reads the headers of the source document for insertion as merge fields.
- **No.** Opens the main document without running the SQL command, creating a document with no active merge fields. If someone has moved or deleted the source document, you need to reconnect to it by navigating to it. Word automatically searches in the **My Data Source** folder.



### Did you know?

SQL is an acronym that stands for Structured Query Language, and you pronounce as separate letters. SQL is a widely used query language for requesting information from a database.

---

## Add recipients to the recipient list by using the Mailings tab

1. In the **Start Mail Merge** group, select **Edit Recipient List**, as the following screenshot depicts.

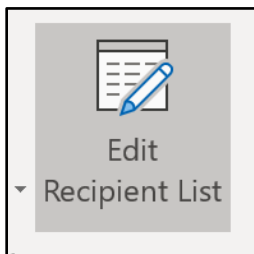


Figure 15: The **Edit Recipient List** command

2. In the **Mail Merge Recipients** dialog box, in the **Data Source** box, select your file, as the following screenshot depicts.

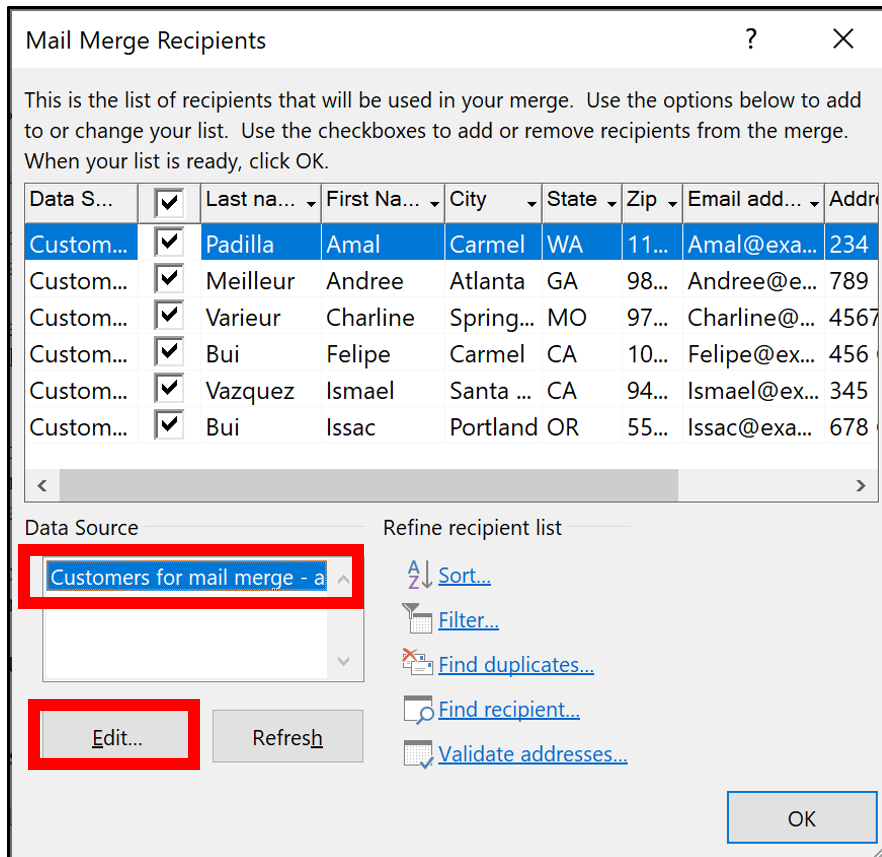


Figure 16: The **Mail Merge Recipients** dialog box

3. Select **Edit**. The **Edit Data Source** dialog box displays.
4. Select **New Entry**.
5. A new highlighted row displays for the data entry. Enter data for each field by selecting that field in the row, and navigate by using the Tab key, as the following screenshot depicts.



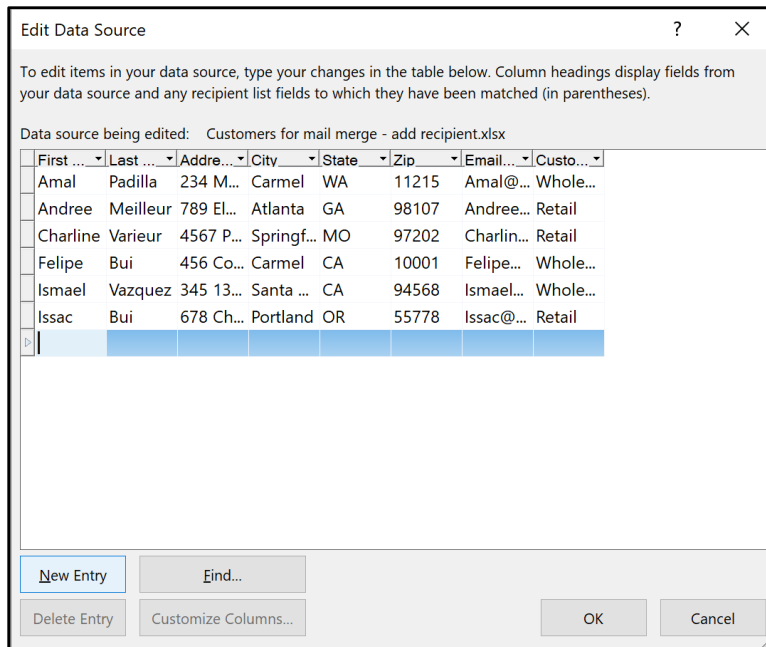
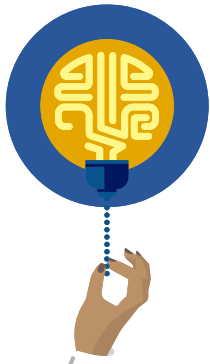


Figure 17: The **Edit Data Source** dialog box



## Did you know?

You can sort your recipient list by any header. With this capability, you can print your document in different orders, such as by last name and by ZIP code, depending on what your headers are. You can also filter the data source information.



## Additional information

For more information about sorting data for mail merge, refer to: [Query Options Sort dialog](#)

## Activity: Discuss and learn

In this activity, you'll discuss several types of source document information and learn how to edit the recipient list.

## Resources required

None

## Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.

## Try-it: Add information to a source document within Word



In this standalone try-it activity, you'll practice adding information to a connected source document.

## Resources

You'll need the following resources for this try-it:

- **L2\_T1\_try\_family\_day\_starter.docx** and **L2\_T1\_try\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

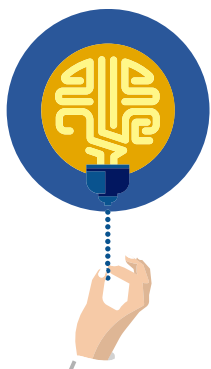
The following are the general tasks that you need to perform during this try-it:

1. Open the **L2\_T1\_try\_family\_day\_starter.docx** merged document.
2. Add three recipients of your choice to the source file by using the **Mailings** tab.
3. Save and close the document.

## Topic 2: Add information to an Excel source document



Editing the recipient list in Word isn't the only method for recipient management. You can use a spreadsheet or a .csv file (that is, a comma-separated values file) as a source document to merge the recipient information with the main document. Various apps, such as social media apps, provide spreadsheets. To add the information, you can also create any type of form and use it as a survey, or you can use a Microsoft Access database.



## Did you know?

With the **Text Import Wizard**, you can import information into your Excel spreadsheet from either a .csv file or a .txt file (that is, a text file). Most business programs have a way to export information in the .csv file format, which speeds up the process of source document creation.

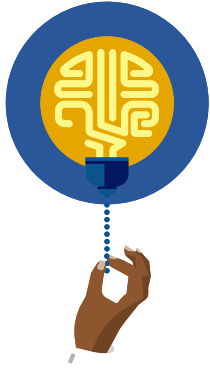
To add information to an Excel source document, perform the following steps:

1. With the main document closed, open the Excel source document, as the following screenshot depicts.

	A	B	C	D	E	F	G	H
1	First Name	Last name	Address 1	City	State	Zip	Email address	Customer type
2	Amal	Padilla	234 Main Street	Carmel	WA	11215	<a href="mailto:Amal@example.com">Amal@example.com</a>	Wholesale
3	Andree	Meilleur	789 Elm Street	Atlanta	GA	98107	<a href="mailto:Andree@example.com">Andree@example.com</a>	Retail
4	Charline	Varieur	4567 Pine Avenue	Springfield	MO	97202	<a href="mailto:Charline@example.com">Charline@example.com</a>	Retail
5	Felipe	Bui	456 College Street	Carmel	CA	10001	<a href="mailto:Felipe@example.com">Felipe@example.com</a>	Wholesale
6	Ismael	Vazquez	345 13th Street	Santa Cruz	CA	94568	<a href="mailto:Ismael@example.com">Ismael@example.com</a>	Wholesale
7	Issac	Bui	678 Cherry Street	Portland	OR	55778	<a href="mailto:Issac@example.com">Issac@example.com</a>	Retail
8	Stephanie	Deniger	456 Broadway Avenue	Jackson	MS	98204	<a href="mailto:Stephanie@example.com">Stephanie@example.com</a>	Retail
9	Stewart	Frizzell	3456 Park Boulevard	Mesa	AZ	56984	<a href="mailto:Stewart@example.com">Stewart@example.com</a>	Wholesale
10								
11								
12								
13								

Figure 18: An Excel source document

2. Add the information you want.
3. Save the source document—without changing its file name or location.
4. Close the document.
5. Open the main document, accept the SQL command in the dialog box, and then preview the results to review the new merged information (or access to the newly matched merge fields).



### Did you know?

You can store source information on multiple sheets in an Excel source document. When you select **Use an Existing List**, you can choose the sheet you want to match data from.

## Activity: One step backward, two forward

In this activity, you'll learn to update a source document.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Think about how you updated the source document within Word. Using that knowledge, answer the following questions:
  - a. What steps would you take to add information to your source document outside of Word?
  - b. What are the differences between updating your source document outside of Word and doing so within Word?
2. Share your ideas with a classmate.

## Try-it: Add information to an Excel source document



In this leveled try-it activity, you'll practice adding information to an Excel source document for a mail merge.

### Try-it 1

In this try-it, you'll update the source document in Excel by adding more recipients.

## Resources

You'll need the following resources for this try-it:

- **L2\_T2\_try1\_family\_day\_starter.docx** and **L2\_T2\_try1\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Add two new recipients of your choice to the Excel file.
2. Check that your mail merge document, **L2\_T2\_try1\_family\_day\_starter.docx**, updated by previewing your results.
3. Save and close the document.

## Try-it 2

In this try-it, you'll update the source document in Excel by adding more columns and rows.

## Resources

You'll need the following resources for this try-it:

- **L2\_T2\_try2\_family\_day\_starter.docx** and **L2\_T2\_try2\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Add a column to your Excel file, and then fill in the information. (For example, the column header might be **Favorite**, and the information might be **pickle** or **preserve**.)
2. Add two new recipients of your choice.
3. Open the **L2\_T2\_try2\_family\_day\_starter.docx** document.
4. Enter a new sentence, and then insert a merge field from the new column.
5. Check that your merge document updated by previewing the results.
6. Save and close the document.

## Try-it 3

In this try-it, you'll update the source file in Excel by adding more columns and rows. You'll then insert Munson's address by using a Quick Part and create a simple macro.

## Resources

You'll need the following resources for this try-it:

- **L2\_T2\_try3\_family\_day\_starter.docx** and **L2\_T2\_try3\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Add a column to your Excel file, and then fill in the information. (For example, the column header might be **Favorite**, and the information might be **pickle** or **preserve**.)
2. Add two new recipients of your choice.
3. Open the **L2\_T2\_try3\_family\_day\_starter.docx** document.
4. Enter a new sentence, and then insert a merge field from the new column.
5. Check that your merge document updated by previewing the results.
6. Using the **Quick Part** for the address block for Munson's Pickles and Preserve Farm, format the document as a letter. (If you don't have a Quick Part, create one by using Munson's address: **Munson's Pickles and Preserves Farm, 234 Bridge Street, Edison, WA 10215**).
7. Create a simple macro, and then save the document to embed the macro for other users.

## Topic 3: Filter a recipient list



When using the **Edit Recipient List** command to add or edit recipients, you might have noticed that the **Mail Merge Recipients** dialog box had a few more options, such as **Filter**. With **Filter**, you can select recipients based on the header information. You can use a filter to send letters only to recipients in a specific City/Burgh/Municipality or to employees in a specific department.

### Filter a recipient list by using the Mailings tab

1. On the **Mailings** tab, select **Edit Recipient List**.
2. Note that you have two options for filtering the recipients, which the following screenshot depicts:
  - The first and simpler way is to select and clear the check boxes in the upper part of the **Mail Merge Recipients** dialog box.

- The second, more powerful way is by using the Filter option.

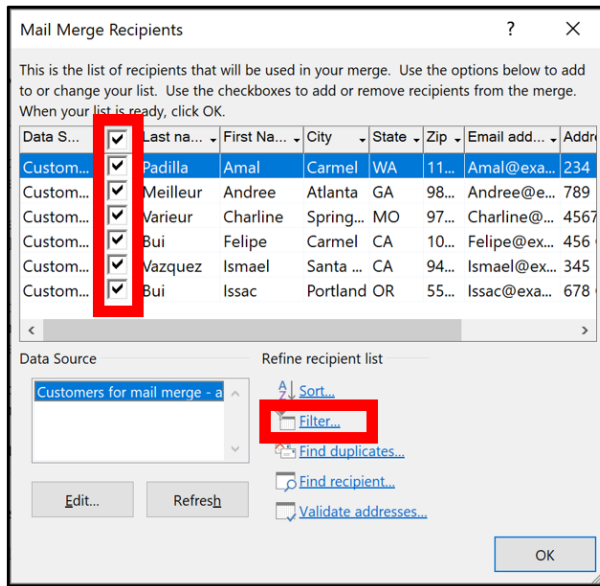


Figure 19: The **Mail Merge Recipients** dialog box

3. Select **Filter**. In the **Filter and Sort** dialog box that appears, select your filter criteria. You can select more than one criterion, and you can specify **AND** or **OR**. Note that filtering doesn't change the source data but only the filters that the mail merge will use, as the following screenshot depicts.

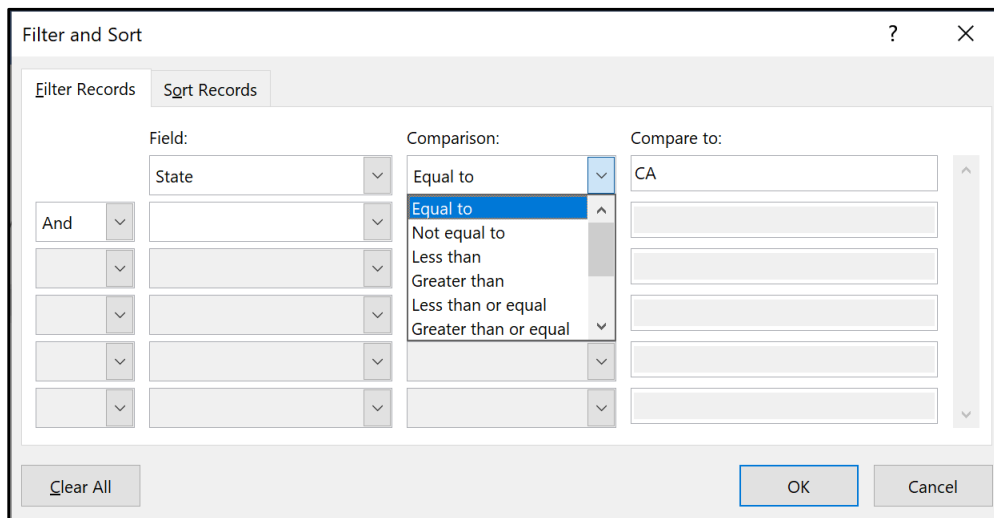


Figure 20: The **Filter and Sort** dialog box

4. Select **OK**.

## Find duplicates by using the Edit Recipient List command

1. On the **Mailings** tab, select **Edit Recipient List**, and then select **Find duplicates**, as the following screenshot depicts.

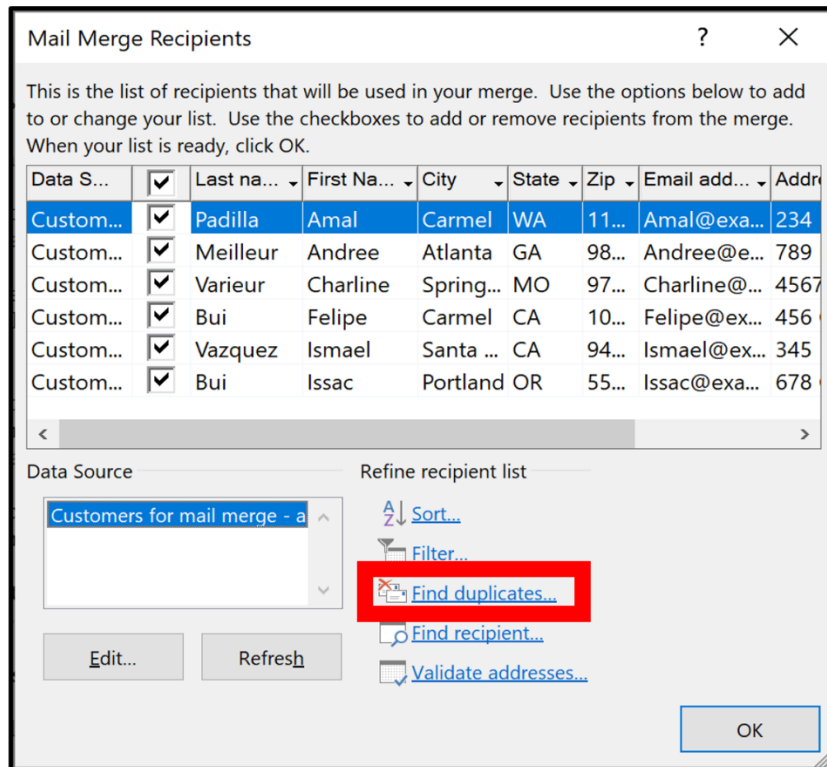


Figure 21: The **Mail Merge Recipients** dialog box



2. In the **Find Duplicates** dialog box that appears, select each entry you want to include in the mail merge, and then select **OK**, as the following screenshot depicts.

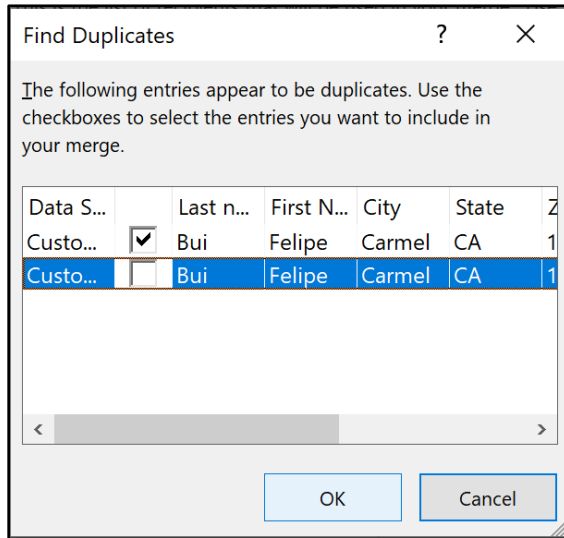


Figure 22: The **Find Duplicates** dialog box

## Activity: Show and tell

In this activity, you'll learn how to filter recipients from your source document.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the teacher's demonstration on how to filter recipients.
2. Participate in the discussion.
3. Ask the teacher clarifying questions.

## Try-it: Filter a recipient list



In this leveled try-it activity, you'll practice filtering a recipient list in two ways.

### Try-it 1

In this try-it, you'll select specific recipients in the list by name.

## Resources

You'll need the following resources for this try-it:

- **L2\_T3\_try1\_family\_day\_starter.docx** and **L2\_T3\_try1\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Select only Amal, Charline, and Felipe to receive flyers.
2. Preview your results.
3. Save and close the document.

## Try-it 2

In this try-it, you'll filter the recipient list by state.

## Resources

You'll need the following resources for this try-it:

- **L2\_T3\_try2\_family\_day\_starter.docx** and **L2\_T3\_try2\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Filter the recipients by the state of California.
2. Preview your results.
3. Save and close the document.

## Try-it 3

In this try-it, you'll filter the recipient list by category and then by state.

## Resources

You'll need the following resources for this try-it:

- **L2\_T3\_try3\_family\_day\_starter.docx** and **L2\_T3\_try3\_customers\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Filter the recipients by the **Wholesale** category and then by the state of California.
2. Preview your results.
3. Save and close the document.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. Which type of document can you use as a source document?

*Select all that apply.*

- a. A Template
  - b. An Outlook contacts list
  - c. An Access database
  - d. A directory
2. You can \_\_\_\_\_ and \_\_\_\_\_ information in the source document by any header.

*Fill in the blank spaces.*

3. You can merge personalized documents for what purposes?

*Select all that apply.*

- a. Only previewing
- b. Sending email messages
- c. Printing documents
- d. Editing individual documents

# Lesson 3: Creating merged documents

## Overview

In this lesson, you'll learn ways to create merged documents. The activities, discussions, and demonstrations in this lesson will give you an opportunity to practice the concepts you learn.

## Warm-up

Use these questions to find out what you already know about this lesson's topics:

1. After you merge \_\_\_\_\_, you can't undo the merge.  
*Fill in the blank space.*
2. You need to create \_\_\_\_\_ in their own blank document, or they'll erase all the information on the page.  
*Fill in the blank space.*
3. When does Word create mail merge document sections?  
*Select the correct option.*
  - a. When you manually insert a section break
  - b. When the document is previewed live
  - c. When you select **Finish & Merge > Edit Individual Documents**
  - d. When you cut the papers in half after printing them

## Topic 1: Finish and merge documents



Understanding the mail merge process, main documents, source documents, merge fields, headers, and merge field block is the formula to a powerful work skill that will expedite how you do business! You've studied how the pieces work together. Now, you'll learn how to merge results by editing individual documents to create the finished product.

## Edit individual documents

In Word, you can create individual, personalized documents based on each row or record in the source document:

1. Select **Finish & Merge**, and then select **Edit Individual Documents**, as the following screenshot depicts.

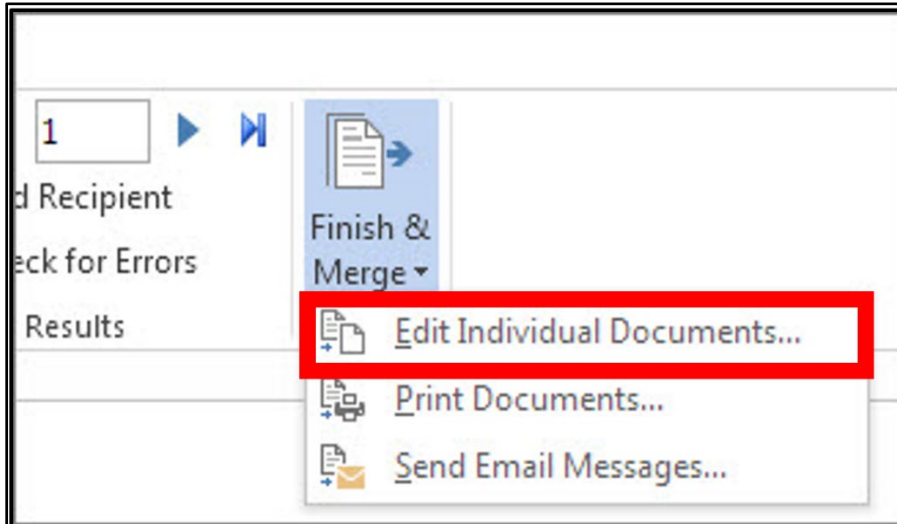


Figure 23: **Edit Individual Documents** on the **Finish & Merge** menu

2. In the **Merge to New Document** dialog box that appears, select which records to merge, as the following screenshot depicts, and then select **OK** to run the merge.

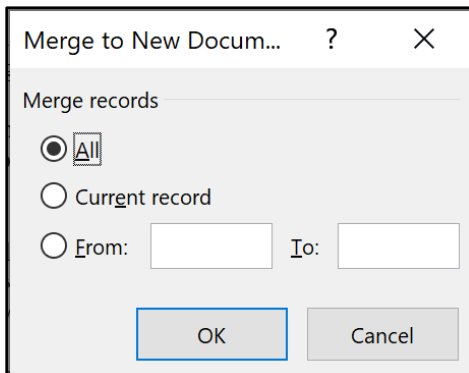


Figure 24: The **Merge to New Document** dialog box

3. Note that when the merge completes, Word opens the individual, personalized documents in a new window and names them **Letters - Filename**. If you don't feel happy with the merge, you can rerun it as many times as needed. Word will progressively change the **Letters** naming convention as you run new merges.

## Understand merged document pagination

When you create these new documents, pagination works differently than with regular documents. Each new document has one page containing multiple sections that Word has personalized. This affects printing. If you want to print pages 5, 8, and 9 or pages 1–10, for example, those are actually sections and not pages, and you enter **s5,s8,s9** or **s1-10** in the **Pages** box for **Custom Print** in the **Microsoft Office Backstage** view, as the following screenshot depicts.

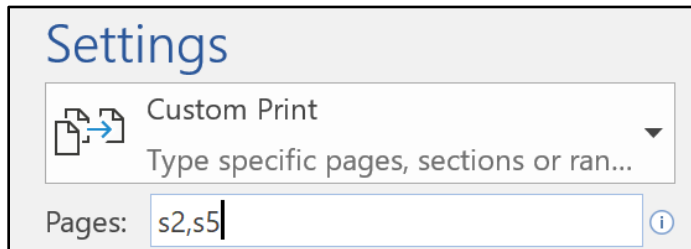


Figure 25: The **Pages** box

## Print documents

In Word, you can create individual, personalized documents based on each row or record in the source document; and send them directly to the printer:

1. Select **Finish & Merge**, and then select **Print Documents**, as the following screenshot depicts.

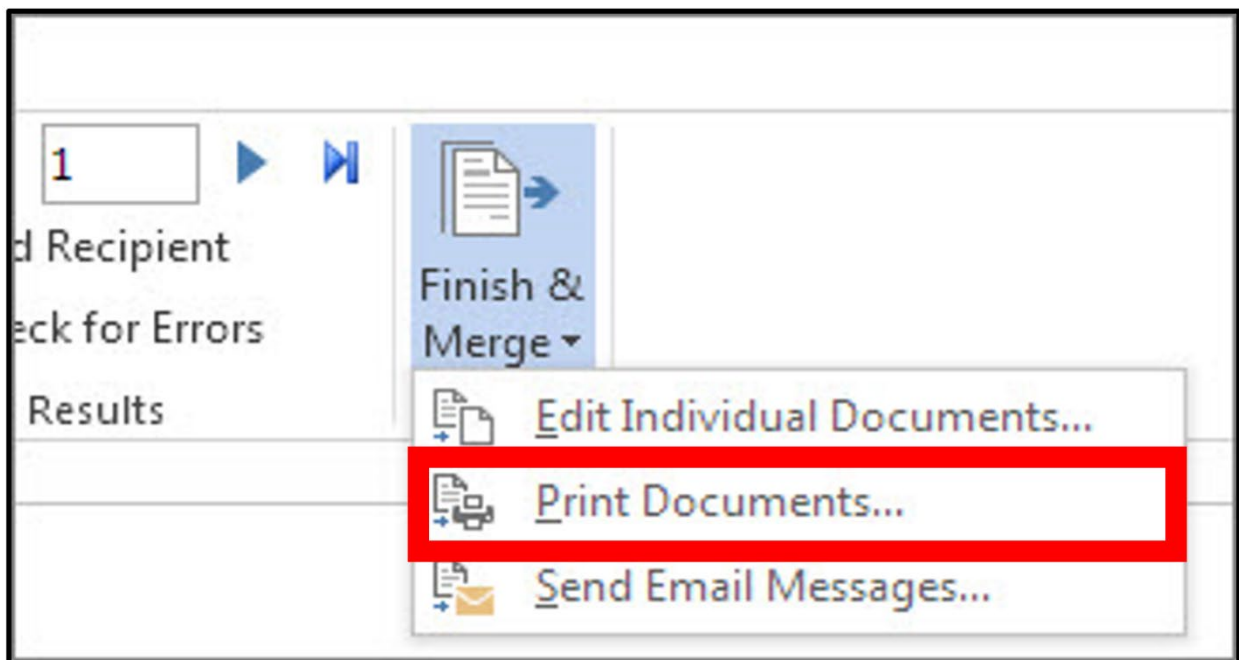


Figure 26: **Print Documents** on the **Finish & Merge** menu

2. In the **Merge to Printer** dialog box that appears, select which records to merge, and then select **OK** to run the merge directly to the printer.

**Caution:** After you select **OK**, Word sends the documents directly to the printer. We recommend avoiding this unless you've previously selected **Edit Individual Documents** and know that the documents are ready to print.

## Activity: Pose a challenge

In this activity, you'll learn how to finish and merge documents.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Use help to search for **Finish & Merge**.
2. Review the information.
3. Partner with a classmate and share your ideas.

## Try-it: Finish and merge documents



In this leveled try-it activity, you'll finish and merge documents.

### Try-it 1

In this try-it, you'll create a mail merge letter and a source document with merge fields and then finish and merge the document for individual review.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a mail merge letter with a small paragraph inviting your friends to a party.
2. Create a source document, and include information for few friends:
  - First name
  - Last name
  - Street address

- City/Burgh/Municipality
  - State/Province/Territory
  - ZIP code
3. Update your document with at least two merge fields.
  4. Finish and merge the document for individual review.
  5. Save and close the merged document.

## Try-it 2

In this try-it, you'll create a mail merge letter and a source document with merge field blocks and then finish and merge the document for individual review.

### Resources

None

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a mail merge letter with a small paragraph inviting your friends to a party.
2. Create a source document, and include information for few friends:
  - First name
  - Last name
  - Street address
  - City/Burgh/Municipality
  - State/Province/Territory
  - ZIP code
3. Include the address block.
4. Finish and merge the document for individual review.
5. Save and close the merged document.

## Try-it 3

In this try-it, you'll create a mail merge letter and a source document with merge field blocks and then finish and merge the document for individual review. You'll then format the document with styles and a theme.

### Resources

None



## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Create a mail merge letter with a small paragraph inviting your friends to a party.
2. Create a source document, and include information for few friends:
  - First name
  - Last name
  - Street address
  - City/Burgh/Municipality
  - State/Province/Territory
  - ZIP code
3. Include the address and greeting line blocks.
4. Apply a theme.
5. Apply styles (for example, **Heading 1** and **Strong**) to parts of your document.
6. Finish and merge the document for individual review.
7. Save and close the merged document.

## Topic 2: Finish and merge email messages



In the previous topic, you learned how to create personalized documents. You can also create personalized email messages in an analogous way.

In Word, you can create individual, personalized email messages based on each row or record in the source document.

### Choose the email account from which to send merged messages

If you're managing multiple email accounts in Outlook, the merged emails will be sent from the default account. You need to set both the email account and the data file as the default.

## Finish the merge to send the email messages

1. Select **Finish & Merge**, and then select **Send Email Messages**, as the following screenshot depicts.

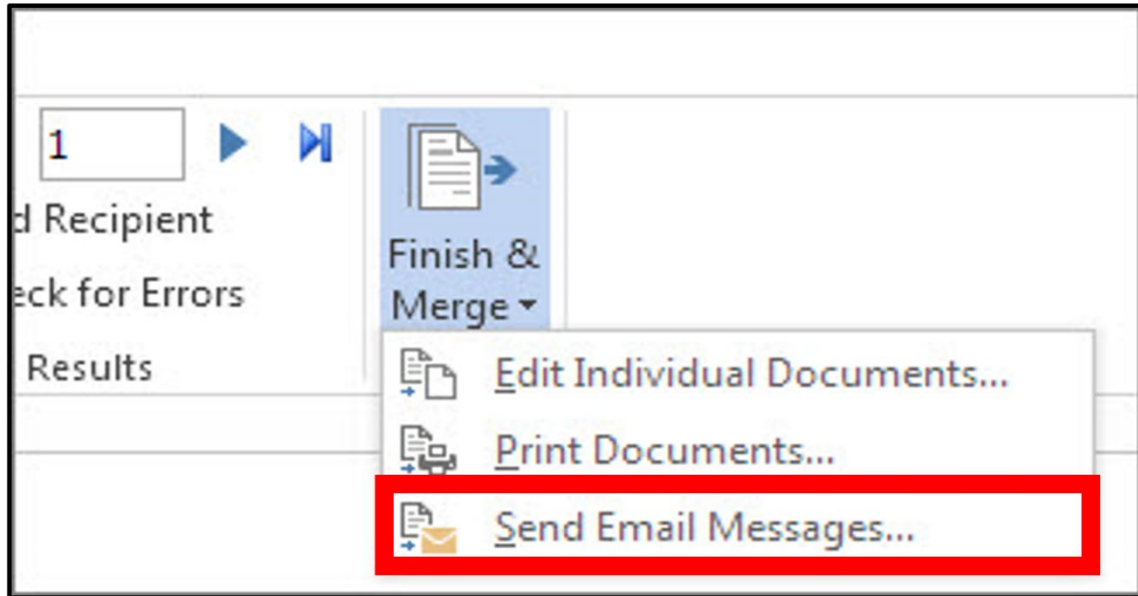


Figure 27: **Send Email Messages** on the **Finish & Merge** menu

2. In the **Merge to E-mail** dialog box that appears, configure the message options, making sure to enter an appropriate subject line, and then select which records to merge into an email, as the following screenshot depicts.

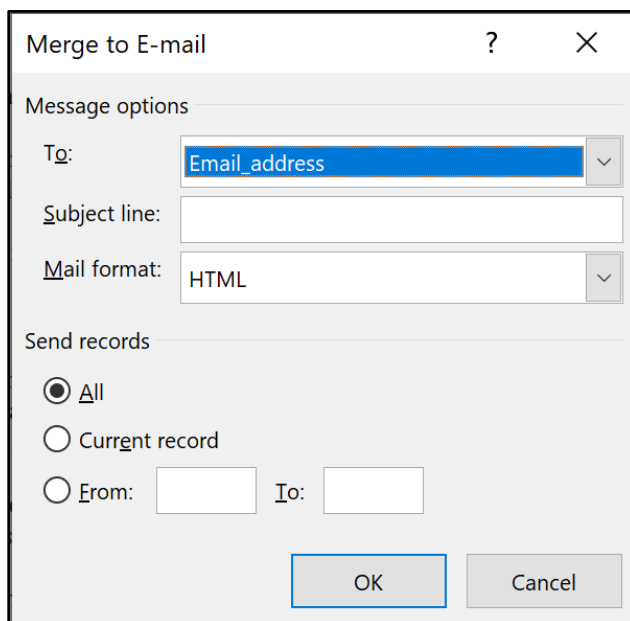


Figure 28: The **Merge to E-mail** dialog box

3. Select **OK** to run the merge and send the emails.

**Caution:** After you select **OK**, the merge will complete, and Outlook will send the emails. You won't be able to undo these actions.

## Activity: Discuss and learn

In this activity, you'll participate in a teacher-led group discussion on how to use **Finish & Merge** to send bulk emails.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Participate in the discussion.
2. Ask the teacher clarifying questions.

## Try-it: Finish and merge email messages



In this standalone try-it activity, you'll finish and merge email messages.

### Scenario

Now that you've created a simple invitation, you choose to send it by email instead of as a document.

### Resources

You'll need the following resources for this try-it:

- **L3\_T2\_try\_letter\_starter.docx** and **L3\_T2\_try\_friends\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Update your source document to include email addresses.
2. Use **Finish & Merge** to send the email invitations.
3. Save and close the documents.

## Topic 3: Create envelopes and labels



So far, you've learned how to create personalized documents and send them as emails. What if you want to mail the personalized documents? Wouldn't you also want to create a batch of envelopes or labels instead of handwriting each one? You can use **Finish & Merge** to do this, as well.

### Create and print a batch of envelopes

1. Just for envelopes, open a new blank document.
2. On the **Mailings** tab, select **Start Mail Merge**, and then select **Envelopes**.
3. Set your envelope options.
4. Set your printing options, as the following screenshot depicts.

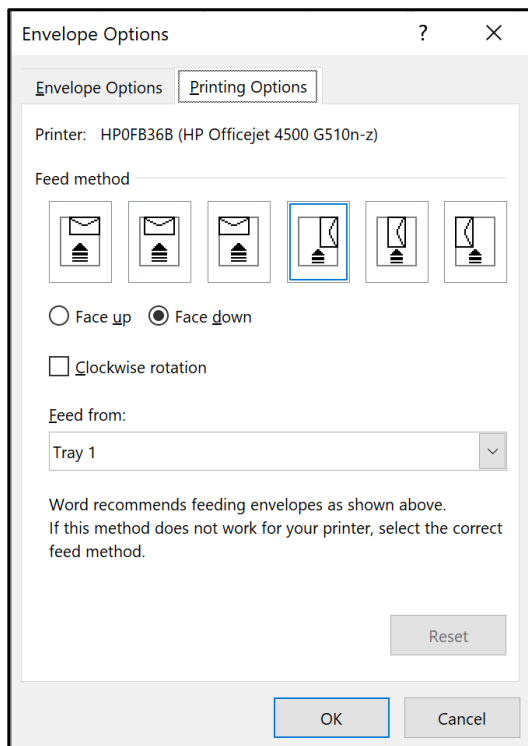


Figure 29: The **Printing Options** tab in the **Envelope Options** dialog box

5. Select **OK**. Word changes the envelope size for the document, and you can insert return address information and merge fields or an address block for the recipient.

## Create and print labels

1. On the **Mailings** tab, select **Start Mail Merge**, and then select **Labels**.
2. Set your labels options, as the following screenshot depicts, and note that you can find information about your labels on the label packaging.

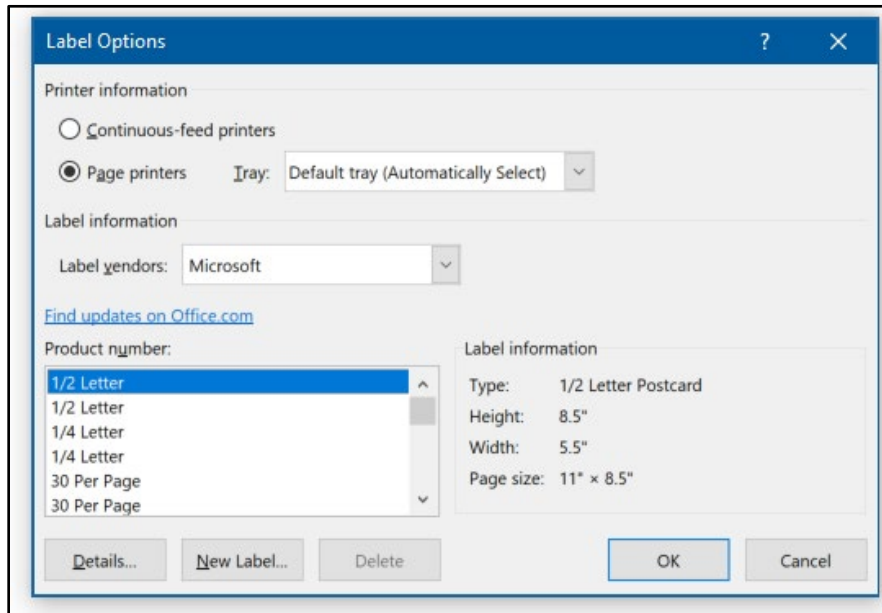


Figure 30: The **Label Options** dialog box

3. Select **New Label** to review the label layout and apply merge rules to the labels.
4. Set up the first label with your merge fields.
5. For the next label, in the **Write & Insert Fields** group, select **Rules > Next Record > Next Record Rule**.
6. Select **Update Labels**. The following screenshot depicts the labels you need to update.



Figure 31: The labels you need to update

## Activity: Show and tell

In this activity, you'll learn the steps for creating envelopes and labels.

### Resources required

None

### Activity instructions

Participate in the activity by following these instructions:

1. Observe the demonstration on how to create envelopes and labels.
2. Ask clarifying questions.
3. Participate in the discussion.

## Try-it: Create and print envelopes and labels



In this leveled try-it activity, you'll practice creating envelopes and labels.

### Try-it 1

In this try-it, you'll create a mail merge envelope with merge field blocks and then finish and merge the document for individual review.

### Scenario

Many of your guests brought a small gift to the party. To express your appreciation, you decide to send each of them a thank you note in the mail.

### Resources

You'll need the following resources for this try-it:

- **L3\_T3\_try1\_friends\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a new blank document to create a mail merge envelope that uses the recipients from the source document, **L3\_T3\_try1\_friends\_starter.xlsx**.
2. Update the envelope information to include the recipient name and address.

3. Use **Finish & Merge** to edit the individual documents.
4. Save and close the documents.

## Try-it 2

In this try-it, you'll create a mail merge label with merge field blocks and then finish and merge the document for individual review.

### Scenario

Many of your guests brought a small gift to the party. To express your appreciation, you decide to send each of them a thank you note in the mail.

### Resources

You'll need the following resources for this try-it:

- **L3\_T3\_try2\_friends\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

### Instructions

The following are the general tasks that you need to perform during this try-it:

1. Open a new blank document to create a mail merge letter that uses the recipients from the **L3\_T3\_try2\_friends\_starter.xlsx** file.
2. Create a short thank you note that uses merge fields.
3. Do a mail merge for labels that includes the recipient name and address.
4. Update the labels as needed.
5. Use **Finish & Merge** to edit the individual documents.
6. Save and close the documents.

## Try-it 3

In this try-it, you'll create a mail merge document and labels with merge fields and merge field blocks, update the data source, and then finish and merge the document for individual review.

### Scenario

Many of your guests brought a small gift to the party. To express your appreciation, you decide to send each of them a thank you note in the mail.

## Resources

You'll need the following resources for this try-it:

- **L3\_T3\_try3\_friends\_starter.xlsx** from this lesson's **Learning Activity Resources** folder

## Instructions

The following are the general tasks that you need to perform during this try-it:

1. Update the **L3\_T3\_try3\_friends\_starter.xlsx** file to include the gifts your friends brought.
2. Open a new blank document to create a mail merge letter that uses the recipients from the **L3\_T3\_try3\_friends\_starter.xlsx** file.
3. Create a short thank you note that uses merge fields and merge field blocks.
4. Do a mail merge for labels that includes the recipient name and address.
5. Update the labels as needed.
6. Use **Finish & Merge** to edit the individual documents.
7. Save and close both the letter and the labels.

## Wrap-up

Use these questions to check what you learned in this lesson:

1. If you want to create labels only for people that live in Virginia, which commands can you use?

*Select all that apply.*

- a. **Filter**
- b. **Rules**
- c. **Update Labels**
- d. **Match Fields**



2. You can create envelopes and labels from:

*Select all that apply.*

- a. The **Create** group
- b. The **Write & Insert Fields** group
- c. The **Start Mail Merge** group
- d. The **Finish** group

3. What sequence of steps should you follow to create labels?

*Indicate the correct sequence by adding the numbers 1–4 next to the following items.*

- a. Select **Rules** > **Next Record**. \_\_\_\_\_
- b. Insert merge fields. \_\_\_\_\_
- c. Update labels. \_\_\_\_\_
- d. Select **Start Mail Merge** > **Labels**. \_\_\_\_\_

# Glossary

<b>Access</b>	A relational database management system from Microsoft that combines the Jet engine with a graphical user interface and software development tools. It can also import or link directly to data that other applications and databases store.
<b>Column</b>	A vertical series of cells in a chart, table, or spreadsheet.
<b>Compatibility mode</b>	A software mechanism in which software either emulates an older version of software or mimics another operating system to allow older or incompatible software or files to remain compatible with the computer's newer hardware or software.
<b>CSA program</b>	A community supported agriculture (CSA) program, in which shareholders in the community support a farm operation by sharing both the benefits and the risks of food production.
<b>.csv file</b>	A comma-separated values file, which uses a simple file format to store tabular data, such as that in a spreadsheet or database. By nature, commas separate the text in the file, but the file can consistently use any separating value, such as a tab, a space, a slash (/), a hyphen (-), or a backslash (\).
<b>Header</b>	The name in the first cell of a column, which people often refer to as a title. It's the name that a mail merge maps to as a merge field for placement in the main document.
<b>Mail merge</b>	A process of combining information in a source document and a main document via mapped merge fields, thus creating individual, personalized documents for each row or record in the source document.

<b>Merge field</b>	A field you can put in a main document to incorporate values from a record. Word creates these fields based on the headers in the source document. For example, you can place a merge field in an email template so the greeting includes the recipient's name rather than a generic Hello.
<b>Placeholders</b>	Merge fields that you place in the main document until you connect it to the source document. The main document thus holds the structure of the document until real data is available.
<b>Recipient</b>	A person in a record that you'll use in a mail merge.
<b>Source document</b>	A document that stores data for personalization in a mail merge.
<b>Spreadsheet</b>	A spreadsheet program that has a column for each variable in the main document of a mail merge. When the mail merge process runs, the word processing system creates a personalized document for each row.
<b>SQL</b>	Structured Query Language (SQL), which you pronounce as sea-kwell or as individual letters and which is a widely used computer language for relational database management and data manipulation. You can use SQL to query, insert, update, and modify data.

*Table 2: Glossary*

# Cornerstone

## Overview

Use this Cornerstone activity to reinforce the skills you learned throughout this module and the Microsoft Certification exam objectives. Your goal is to complete each task as quickly as possible with 100 percent accuracy.

## Scenario

Munson's Pickles and Preserves Farm has asked you to update a list of their CSA program customers in an Excel workbook. The farm plans to send a monthly newsletter to these customers. Many customers chose to receive the newsletter via email, whereas others chose to have a physical copy mailed to them.

You'll update the existing customer list by adding new customers, editing existing customer details, and filtering the information in preparation for the next newsletter mailing.

## Objectives

Cornerstone objective	MOS exam objective
Manage recipient lists	4.3.1 Manage recipient lists
Insert merged fields	4.3.2 Insert merged fields
Preview merge results	4.3.3 Preview merge results
Create merged documents, labels, and envelopes	4.3.4 Create merged documents, labels, and envelopes

*Table 3: Cornerstone objectives mapped to Microsoft Office Specialist (MOS) exam objectives*

## Duration

50 minutes

# Instructions

1. Complete the tasks for each file.
2. When saving your file, add your name to the end of the file name—for example, use **Cornerstone\_Espino.docx**. Follow your teacher's directions for where to save your files.
3. When you complete the Cornerstone, assess your completion, and enter the points you think you earned in the tasks in the following section. You can get help from your teacher if needed.

## Tasks

In this Cornerstone, you'll work with two files: File 1 has 5 tasks, and File 2 has 7 tasks (for a total of 12 tasks). This is a leveled Cornerstone. File 1 focuses on Module 7 exam objectives, whereas File 2 incorporates exam objectives from various modules.

## Duration

50 minutes in class

# Instructions

## File 1: Cornerstone\_newsletter\_starter.docx

You'll also need the **Customers\_sample.xls** supporting source file.

### Task: Insert merge fields (3 points)

1. Using **Cornerstone\_newsletter\_starter.docx**, create a new mail merge letter. (1 point) (No exam objective)
2. Add **Customers\_sample.xls** for the recipients. (1 point) (No exam objective)
3. Add a short paragraph in the **Welcome** area that uses the customer information by inserting a merge field. (1 point) (Exam objective 4.3.2)

Points scored: \_\_\_\_\_ / 3

### **Task: Update the recipient list (2 points)**

1. Add the following customer to the source document by using Excel. (1 point) (Exam objective 4.3.1)

Kara Gates

1234 Main Avenue

Columbus, OH 23456

kara@example.com

Retail

2. Preview the results to ensure that the new customer appears. (1 point) (Exam objective 4.3.3)

Points scored: \_\_\_\_\_ / 2

### **Task: Edit the recipient list (3 points)**

1. Add the following customer by editing the recipient list in Word. (1 point) (Exam objective 4.3.1)

Molly Romero

456 Cypress Street

Fayetteville, NC 12345

molly@example.com

Retail

2. Sort the recipients by last name and then by first name. (1 point) (Exam objective 4.3.1)

3. Add a new column to the source file to track delivery preferences, and then update the recipients' records as the following table lists. (1 point) (Exam objective 4.3.1)

First name	Last name	Delivery preference
Amal	Padilla	Mail
Andree	Meilleur	Mail
Charline	Varieur	Email
Felipe	Bui	Mail
Ismael	Vazquez	Email
Issac	Bui	Email
Stephanie	Deniger	Email
Stewart	Frizzell	Mail
Kara	Gates	Email
Molly	Romero	Mail

*Table 4: Customer information*

Points scored: \_\_\_\_\_ / 3

### **Task: Send emails (2 points)**

1. Filter the recipients to include only the customers that prefer an emailed copy of the newsletter. (1 point) (Exam objective 4.3.1)
2. Send the newsletters by email. (1 point) (Exam objective 4.3.1)

Points scored: \_\_\_\_\_ / 2

### **Task: Create labels (5 points)**

1. Create new merge labels by using Microsoft, 30 per page, and a 1-inch height. (1 point) (Exam objective 4.3.4)
2. Filter the recipients to include only the customers that prefer a mailed copy of the newsletter. (1 point) (Exam objective 4.3.1)
3. Use the address block for your labels. (1 point) (Exam objective 4.3.1)
4. Review the results to observe the completed label sheet, and then fix any errors. (1 point) (Exam objective 4.3.3)
5. Save the file. (1 point) (Exam objective 4.3.4)

Points scored: \_\_\_\_\_ / 5

File 1 total points: \_\_\_\_\_ / 15

## File 2: Cornerstone\_format\_newsletter\_starter.docx

You'll also need the **Template\_sample.docx** supporting file.

### Task: Find and replace text (2 points)

1. Find all the word forms of **him**. (1 point) (Exam objective 2.1.1)
2. Find all text formatted as small caps, and change the formatting to use **Segoe UI** and **14 points**. (1 point) (Exam objective 2.1.1)

Points scored: \_\_\_\_\_ / 2

### Task: Copy styles (4 points)

1. Copy the styles from **Template\_sample.docx** to **Cornerstone\_format\_newsletter\_starter.docx**. (1 point) (Exam objective 2.3.3)
2. Modify and then apply the **Heading 1** style to **Welcome**. (1 point) (Exam objective 2.3.2)
3. Modify and then apply the **Heading 2** style to the featured employees' names. (1 point) (Exam objective 2.3.2)
4. Create a new paragraph style named **Newsletter Paragraph** with the font settings of your choice, and then apply it to paragraphs. (1 point) (Exam objective 2.3.1)

Points scored: \_\_\_\_\_ / 4



**Task: Do a mail merge (3 points)**

1. Start a new mail merge letter from **Cornerstone\_format\_newsletter\_starter\_docx**. (1 point) (Exam objective 4.3.4)
2. Enter a new list of recipients from the following table. (1 point) (Exam objective 4.3.1)

First name	Last name	Street	City	State	ZIP code	Email address	Customer type
Amal	Padilla	234 Main Street	Carmel	WA	11215	Amal@example.com	Wholesale
Andree	Meilleur	789 Elm Street	Atlanta	GA	98107	Andree@example.com	Retail
Charline	Varieur	4567 Pine Avenue	Springfield	MO	97202	Charline@example.com	Retail
Felipe	Bui	456 College Street	Carmel	CA	10001	Felipe@example.com	Wholesale
Ismael	Vazquez	345 13th Street	Santa Cruz	CA	94568	Ismael@example.com	Wholesale

*Table 5: Recipient information*

3. Add and delete columns as needed.
4. Insert a brief welcome paragraph that uses merge fields. (1 point) (Exam objective 4.3.2)
5. Preview your results.

Points scored: \_\_\_\_\_ / 3

## Task: Manage a recipient list (2 points)

1. Add a new column for the delivery preference, and use the information in the following table. (1 point) (Exam objective 4.3.1)

First name	Last name	Delivery preference
Amal	Padilla	mail
Andree	Meilleur	Mail
Charline	Varieur	Email
Felipe	Bui	Mail
Ismael	Vazquez	Email

*Table 6: Customers with their delivery preferences*

2. Use **Finish & Merge** to send an email only to the recipients that want their newsletter delivered by email. (1 point) (Exam objective 4.3.4)

Points scored: \_\_\_\_\_ / 2

## Task: Configure paragraph layout options (5 points)

1. Using **Cornerstone\_format\_newletter\_starter.docx** set the paragraph pagination so the employees' names use **Keep with next**. (1 point) (Exam objective 2.2.2)
2. Set the hyphenation options to automatically hyphenate the document but not hyphenate words in capitals, and then limit the number of consecutive hyphens to three. (3 points) (Exam objective 2.2.1)
3. Add line numbering to restart at each section. (1 point) (Exam objective 2.2.1)

Points scored: \_\_\_\_\_ / 5

## Task: Finish and merge envelopes (5 point)

1. Start a new mail merge for envelopes. (1 point) (Exam objective 4.3.4)
2. Insert your address as the return address. (1 point) (No exam objective)
3. Using the address block and rules, create an envelope for each recipient that wants the newsletter sent by mail. (2 points) (Exam objective 4.3.2)
4. Use **Finish & Merge** to edit the individual documents. (1 point) (Exam objective 4.3.3)

Points scored: \_\_\_\_\_ / 5

### Task: Prepare documents for collaboration (2 points)

1. Restrict editing to allow only tracked changes, and enforce this with the password **cornerstone**. (1 point) (Exam objective 1.2.1)
2. Password protect the document with the password **cornerstone**. (1 point) (Exam objective 1.2.2)

Points scored: \_\_\_\_\_ / 2

File 2 total points: \_\_\_\_\_ / 23