



University Information
Technology Services

Microsoft Word 2010

Level 3

University Information Technology Services

Outreach, Training, Learning Technologies &
Video Production

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Introduction

This booklet is the companion document to the Word 2010 Level 3 workshop. The content assumes knowledge of the Microsoft Office 2010 interface, and builds on the content contained in the Word 2010 Level 2 booklet.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Add footnotes and endnotes to a document
- Add citations and a bibliography to a document
- Create a table of contents
- Create macros
- Create interactive forms
- Perform a mail merge
- Track and merge changes to a document

Footnotes and Endnotes

Footnotes and endnotes provide referencing information for specific text in a document. Footnotes appear at the bottom of the page on which the reference mark appears; endnotes appear at the end of a section or document.

Inserting a Footnote

The following explains how to insert a footnote on a page.

1. Click in the document at the location where you want the footnote reference mark to appear.
2. Click the **References** tab.
3. In the **Footnotes** group, click **Insert Footnote**.

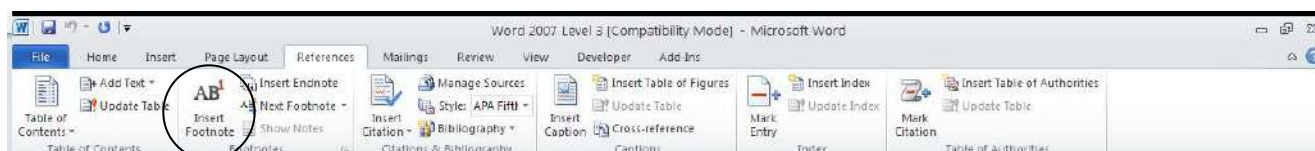


Figure 1—Insert Footnote

4. Type in the footnote entry.
5. If there are changes that you want to make in the location or appearance of the footnotes, click the **Footnote and Endnote dialog box launcher** (this is the arrow on the Ribbon located to the right of *Footnotes*).
6. Make the changes, and then click **Apply**.



Figure 2—Footnote and Endnote Dialog Box

Inserting a Reference to a Footnote (Cross-reference)

The following explains how to insert a reference to a footnote.

1. In the document, type the text that begins the cross-reference (e.g. “For more information, see…”).
2. In the **Captions** group, click **Cross-reference**.

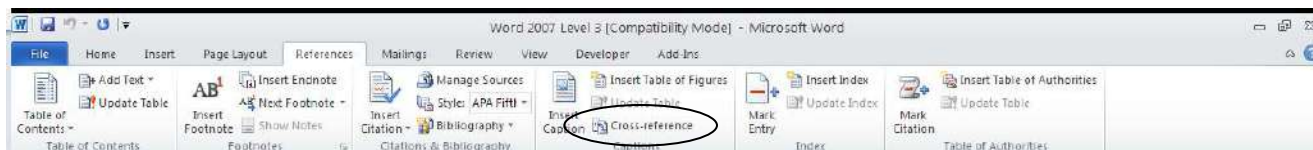


Figure 3—Captions Group

3. Click the arrow in the **Cross-reference** drop-down box.
4. Select **Footnote**, and then select **Footnote Number** from the **Insert Reference to** drop-down box.
5. Select the footnote from the list.
6. Click **Insert**.
7. Click **Close**. A reference mark will appear.

Citations and Bibliography

A citation is information about a source referenced in the document. A bibliography is a collection of these citations. When you add a new source it is saved on your computer so that you can find and use it. The sources can also be used to compile a bibliography.

Adding a Citation

The following explains how to add a citation.

1. Click to select the location in the document where the citation will be placed.
2. Click the **References** tab.
3. Click the **Style** drop-down list and select the citation style that you want to use (APA, MLA, etc.).
4. In the **Citations and Bibliography** group, click **Insert Citation**.

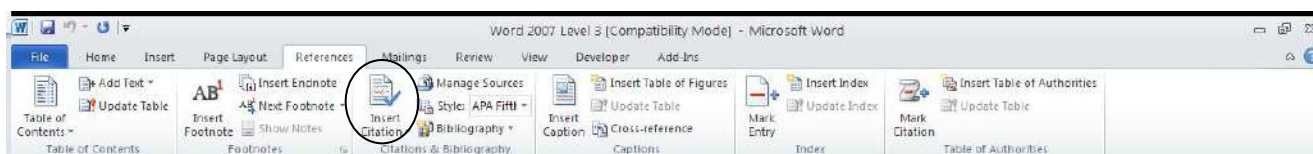


Figure 4—Insert Citation

5. Click **Add New Source**.
 6. In the **Create Source** dialog box, enter the source information.
- Note:** To add additional author names, click the **Edit** button (see Figure 5).

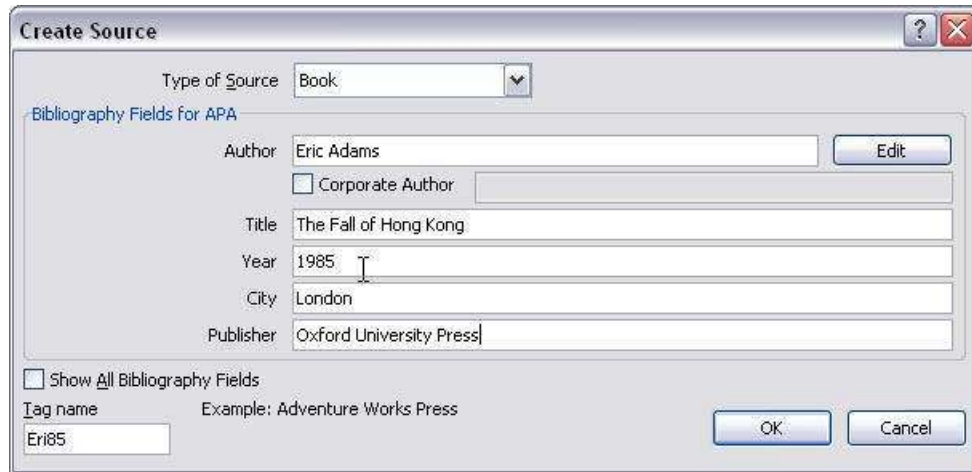


Figure 5—Create Source

7. Click **OK**. The citation appears in the text.

Managing Sources

The following explains how to manage sources:

1. In the **Citations and Bibliography** group, click **Manage Sources**.
2. You can use the **Source Manager** to search for, sort, copy, delete, edit, and add sources.
3. The **Master List** contains sources from every document; the **Current List** contains sources from the active document. The Current List is used to create the bibliography.

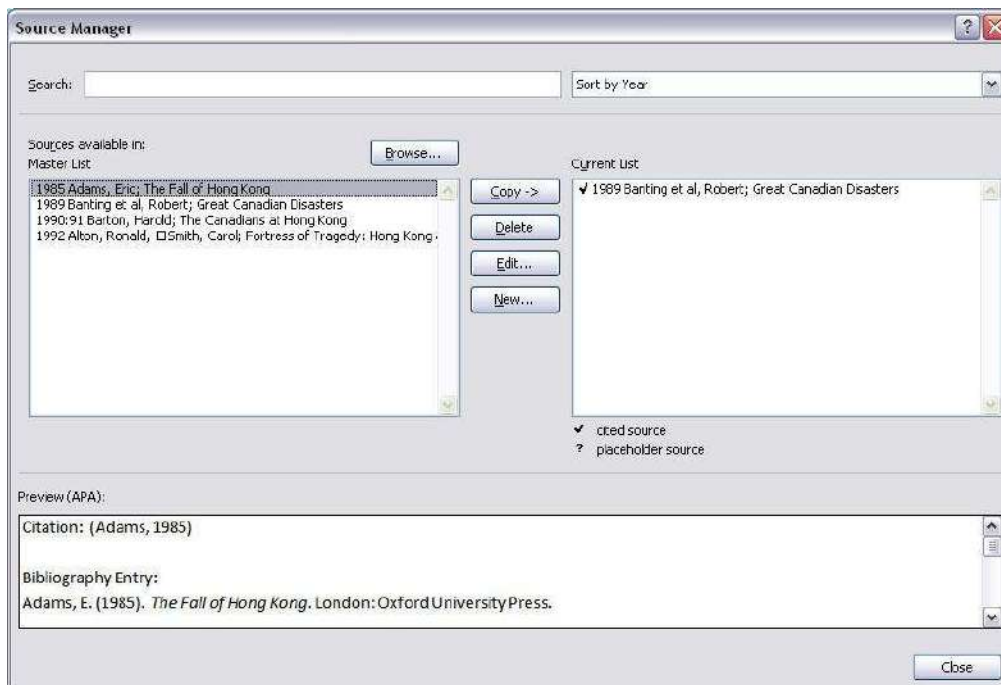


Figure 6—Source Manager

Creating a Bibliography

The following explains how to create a bibliography.

1. Click to place your cursor where you want to insert the bibliography (usually at the end of the document).
2. In the Citations and Bibliography group, click **Bibliography**.
3. Click one of the predesigned bibliography formats, or, click **Insert Bibliography**.



Figure 7—Insert Bibliography

Creating a Table of Contents

You can create a table of contents from text that has been formatted with heading styles, or, by manually marking text that you want included in the table of contents.

1. Click to place your cursor in the document where you want to place the table of contents.
2. Click the **References** tab.
3. In the **Table of Contents** group, click **Table of Contents**.

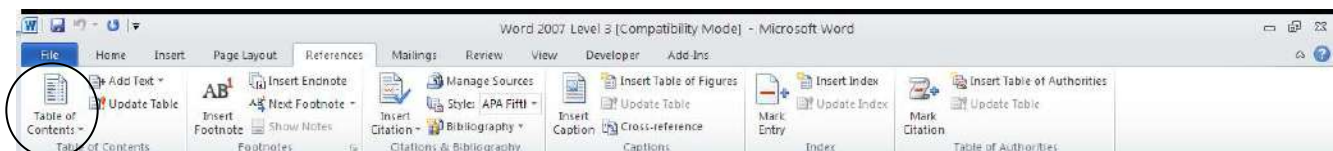


Figure 8—Table of Contents

4. Click **Insert Table of Contents**.

5. To specify the headings to be included in the Table of Contents, click the **Options** button to open the **Table of Contents Options** dialog box.

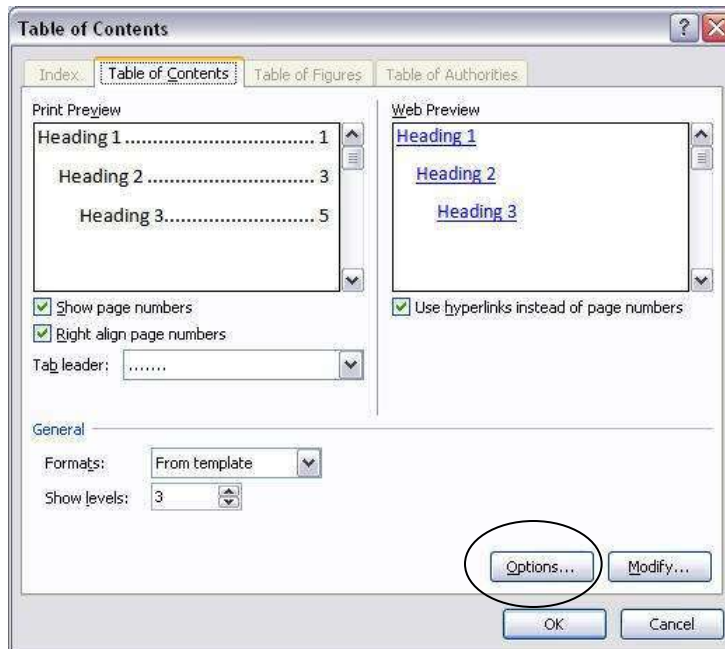


Figure 9—Table of Contents

6. Make sure the **Styles** checkbox is checked, and the **Table entry fields** checkbox is unchecked.

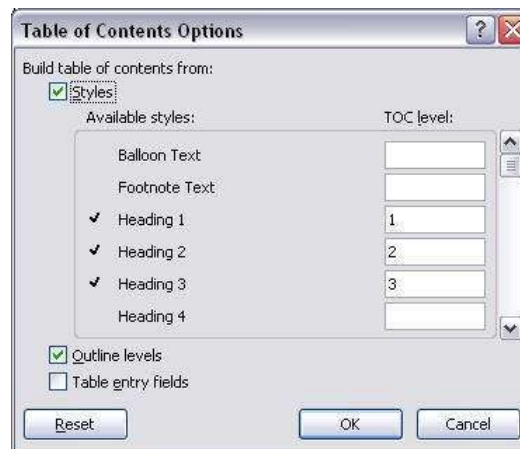


Figure 10—Table of Contents

7. Delete the number from the **TOC level** field of any style that you are not using.
8. Assign the Table of Contents levels by entering a number in the **TOC level** field for each heading style that you want to include from the **Available styles** list.
9. Click **OK**.
10. In the Table of Contents dialog box, select the options you want and click **OK**.

Important Note: If you make changes to the document after you have added the table of contents, click **Update Table** in the Table of Contents group and select the appropriate option from the **Update Table of Contents** dialog box.

Macros

To automate tasks that you perform frequently you can create a *macro*. A macro is a series of commands and instructions that you group together as a single command.

Recording a Macro

1. Click the **Developer** tab.
2. In the **Code** group, click **Record Macro**.

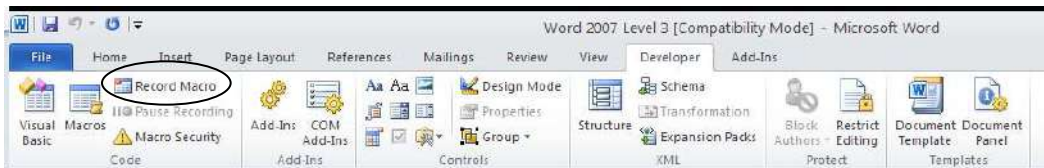


Figure 11—Record Macro

3. In the **Macro name** field, type a name for your macro (spaces between words are not allowed).



Figure 12—Record Macro

4. In the **Description** field, enter a brief description of the macro.
5. Specify where you want the macro stored by clicking on the arrow next to the **Store macro in** field. The *All Documents* selection makes the macro available for all documents that use the “normal.dotm” template.
6. Click the **Keyboard** button to assign your macro to a set of keystrokes. The **Customize Keyboard** dialog box is now opened with the cursor in the Press New Shortcut Key Box; enter the keystroke combination (CTRL + !, ALT + ?, etc.).
Note: You can assign any keystroke combination to the macro. However, if a combination has been assigned to an action, that action will be displayed in the “**Currently assigned to**” section in the dialog box.
7. Click the **Assign** button in the Customize Keyboard dialog box to assign the keyboard shortcut to the macro.

Running a Macro

To run a macro, you can use the keyboard shortcut that was assigned to the macro. Additionally, the following steps are another way to run the macro.

1. Click the **Developer** tab.
2. In the **Code** group, click **Macros**.
3. In the **Macros** dialog box, click the macro and then click **Run**.

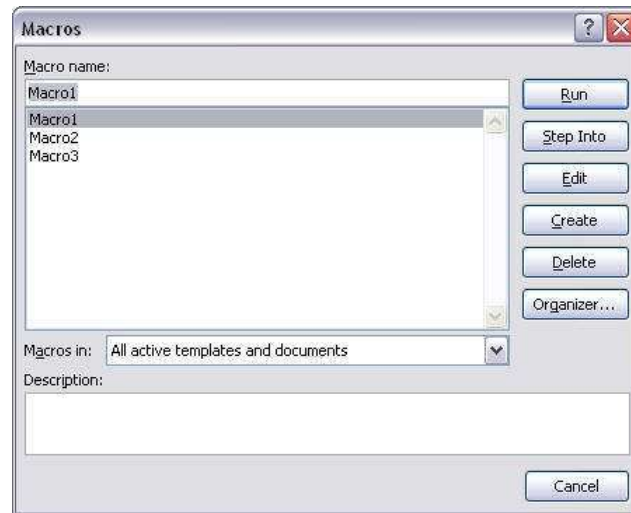


Figure 13—Macros

Note: The Macros dialog box contains an Edit button that will allow you to edit a macro. However, a macro is actually a series of Visual Basic code statements, and you may need to know something about Visual Basic in order to use the edit feature. You may find it easier to just delete the macro and re-record it.

Creating Forms

The most useful forms are based on templates, so that the user fills in a copy and the original does not change. After creating a new blank document template, you can use a table to establish the structure of your form. The cells are ideal for inserting labels and data fields. When you've added whatever text, borders, shading, and other modifications to the table, you can begin to add the form fields.

Name	Phone
Address	Birth Date
City	Major
State	Graduate
Zip	Currently Employed

Figure 14—Table For A Form

Inserting Form Field Controls

1. Click to place your cursor on the form where you want to insert the form field.
2. Click the **Developer** tab.
3. In the **Controls** group, click the type of form field (*control*) that you want to insert.



Figure 15—Form Controls

1. To insert a **Check Box** field, click **Legacy Tools**. 



Figure 16—Legacy Tools

Replacing Instructional Text

All controls contain “instructional” text that indicates what the end user is to do with the control. If you want to change the instructional text that appears in the control, click **Design Mode** in the **Controls** group, select the control, and enter the new text.

The Text and Rich Text Controls

The difference between Text and Rich Text controls is that text that is typed into a Rich Text field can be formatted, and the formatting saved with the form. A Text field is limited to content that cannot contain any formatting, only plain text.

For both Text and Rich Text controls, when the user enters text into the field, the instructional text is replaced.

The Combo Box Control

The Combo Box provides the end user with a list of choices to select from, as well as allowing the end user to enter text into the field.

The Drop-down List Control

The Drop-down list, like the Combo Box, provides a list of choices. However, the end user is restricted to making a selection from the list, and cannot enter text into the field.

The Date Picker Control

The Date Picker contains a calendar that allows the end user to select a date.

The Check Box Form Field

The Check Box field gives the end user a check box that can be clicked to check or un-check the box.

Setting Form Field Properties

After you insert a form field control, you may need to set certain properties for that control. If the control is not already selected, click it, and then click **Properties** in the **Controls** group.

Text and Rich Text Properties

The Title and/or Tag fields allow you to enter a label that displays on the control (until the form is protected for distribution).



Figure 17—Content Control Properties

Clicking the *Use a style to format contents* checkbox allows you to select a Style from the drop-down list that will be used to format the text which the user enters into the field.

Clicking the *Content control cannot be deleted* checkbox prevents the Text control from being deleted while the form is being created or edited. *Controls cannot be deleted by the end user once the form is protected.*

Clicking the *Contents cannot be edited* checkbox prevents the instructional text in the Text control from being changed while the form is being created or edited. **Caution: make sure this checkbox is not checked when it is distributed to end users; otherwise, they will not be able to enter text into the field.**

Clicking the *Remove content control when contents are edited* check box makes the Rich Text control disappear once the user has entered text, leaving just the text.

Combo Box and Drop-down List Properties

General and **Locking** properties are the same as those for Text and Rich Text.



Figure 18—Content Control Properties

To add entries to the combo box drop-down list:

1. Click the **Add** button.
2. Enter the name of each list item.
3. Use the Move Up and Move Down buttons to arrange the items in the list.



Figure 19—Content Control Properties

Date Picker Properties

General and Locking properties are the same as those for Text and Rich Text.

In the **Date Picker Properties** section, select the option for how you would like the date to display in the field.



Figure 20—Content Control Properties

Other options can be left as they are.

Check Box Properties

The following is an example of the Check Box Form Field Options dialog box:



Figure 21—Check Box Form Field Options

Mail Merge

The mail merge feature enables you to take a data source that contains a list of names and addresses, such as an Excel spreadsheet or an Access database, and merge this list with a form letter, mailing labels, or envelopes. You can perform a mail merge by using the **Mail Merge Wizard**, or, by using the commands on the **Mailings** tab.

Using the Mail Merge Wizard

The following example shows the steps for merging a letter with names and addresses in an Excel spreadsheet.

1. Click the **Mailings** tab.
2. In the **Start Mail Merge** group, click **Start Mail Merge**.
3. Select **Step by Step Mail Merge Wizard** from the drop-down list. The **Mail Merge Task Pane** opens.
4. Click the radio button for the type of mailing you are creating.

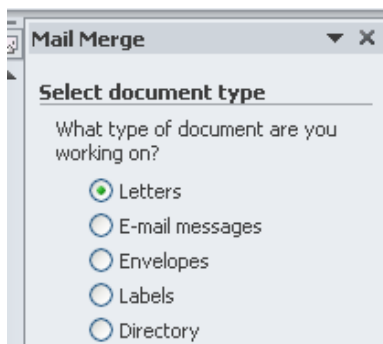


Figure 22—Mail Merge

5. Click **Next** at the bottom of the Task Pane.

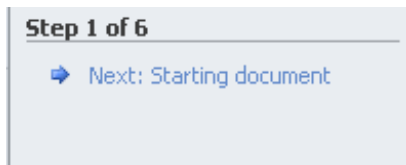


Figure 23—Step 1

6. Click the appropriate radio button from the following list:
 - Use the current document
 - Start from a template
 - Start from existing document

7. Click **Next: Select recipients.**

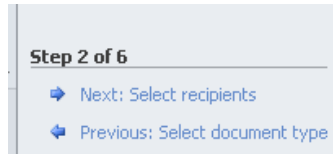


Figure 24—Step 2

8. Click **Browse.**

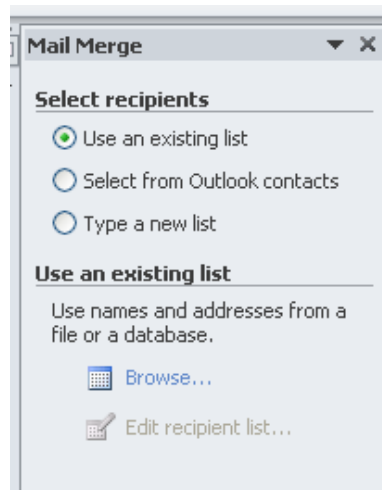


Figure 25—Browse

9. Navigate to your address list file and select it. Then, click OK so that the Mail Merge Recipients list opens.

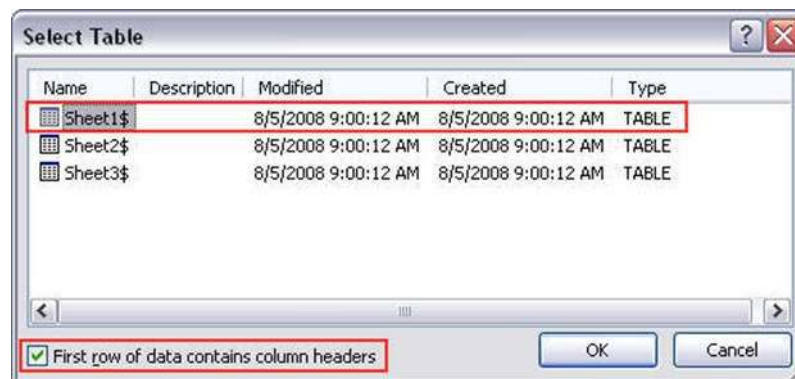


Figure 26—Select Table

10. To merge the entire list of recipients, click **OK**. If you don't want to include every recipient, you can uncheck the records you want to omit (See Figures 27-30 to see other options available).

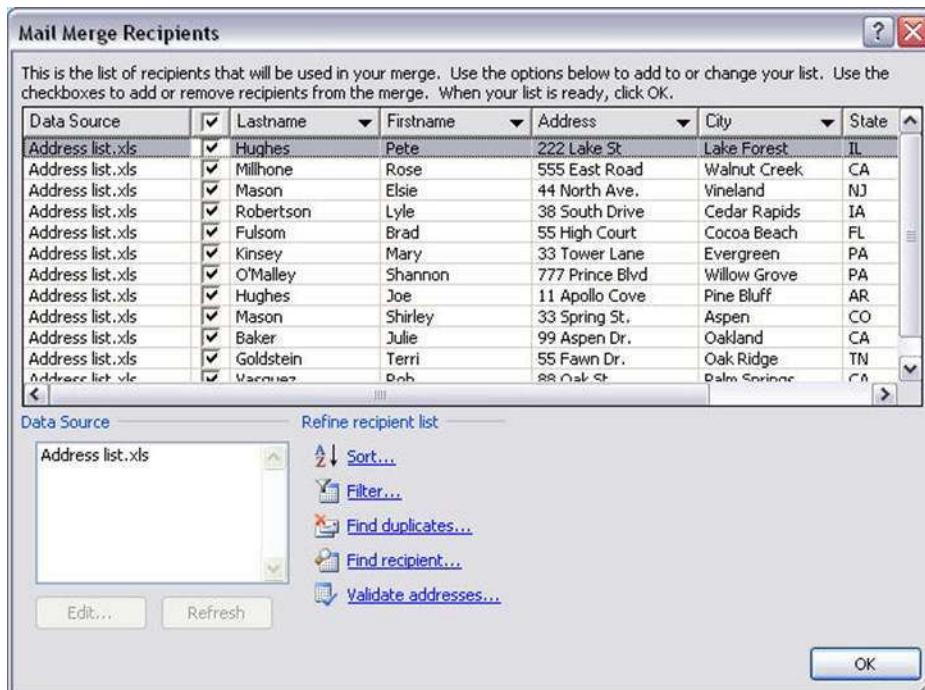


Figure 27—Mail Merge Recipients

A. Sort

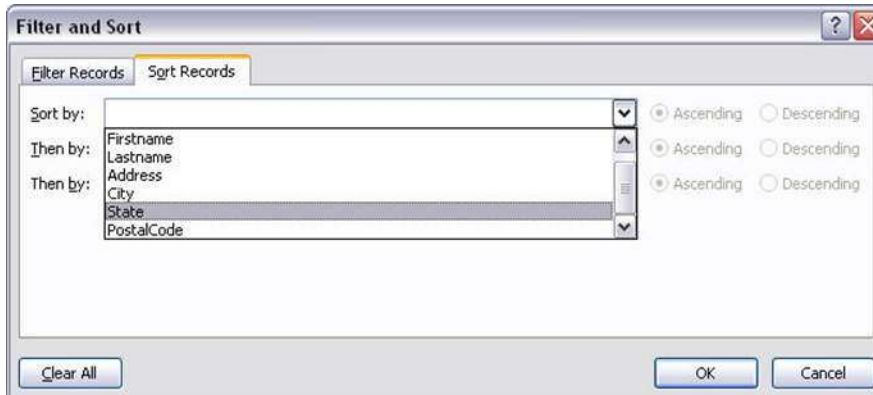


Figure 28—Sort

B. Filter

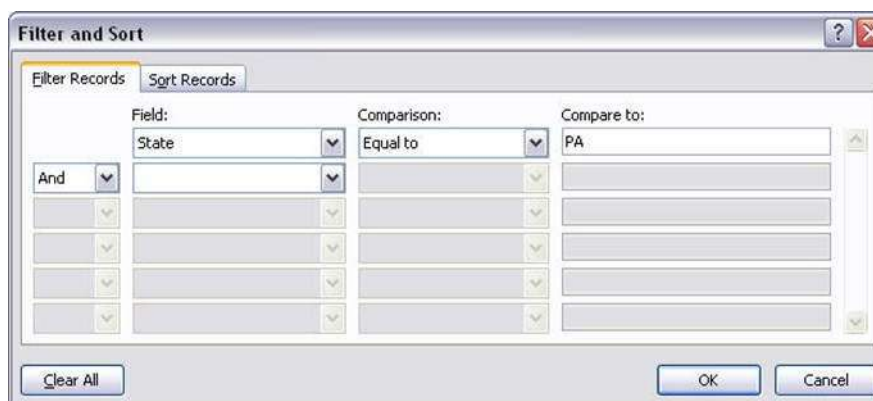


Figure 29—Filter

C. Find Duplicates

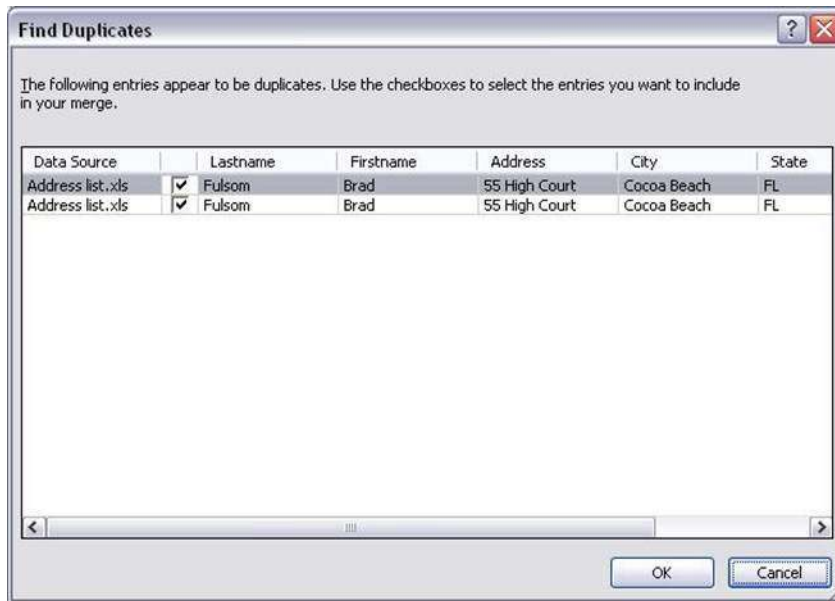


Figure 30—Duplicates

D. Find Entry



Figure 31—Find Entry

11. Click **Next: Write your letter**.

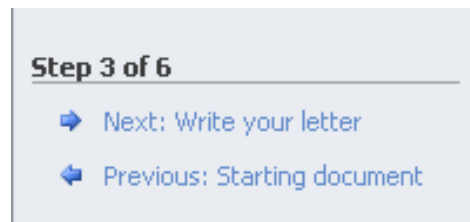


Figure 32—Step 3

12. Place your cursor where you want the Address Block to appear. Then, select **Address Block**. The address block inserts the name and address information for each recipient.

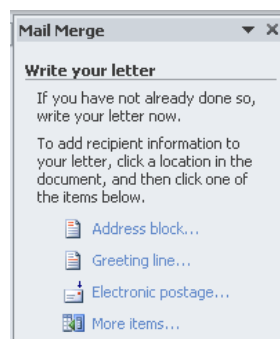


Figure 33—Address Block

13. The address block inserts all of the name and address information for each recipient.

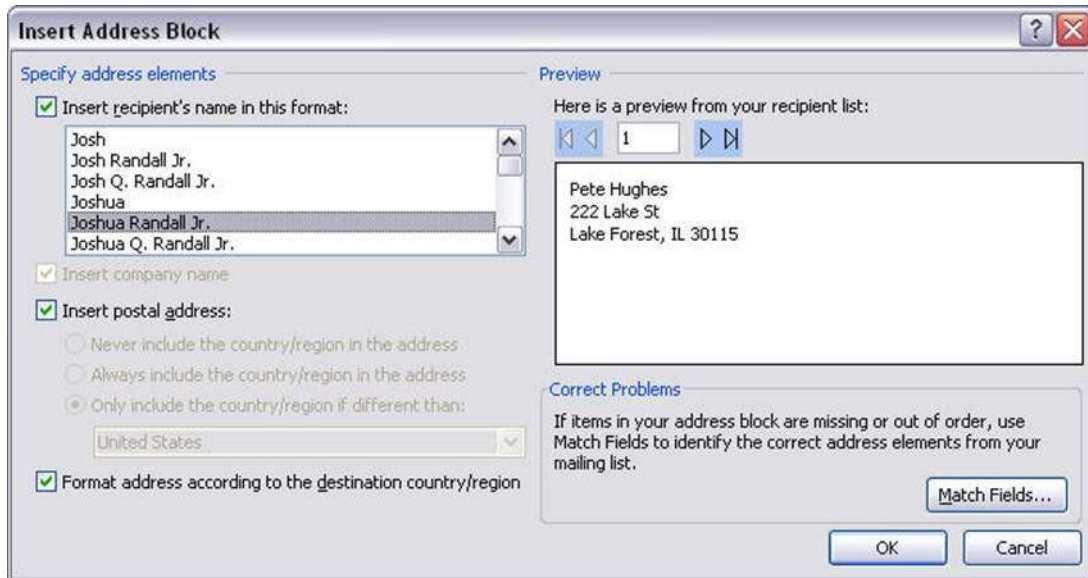


Figure 34—Insert Address Block

- Select the format that you would like for the recipient's name.
- Some options may be "grayed out" if your recipient list does not contain certain information.
- If some of the information in your recipient list is missing, click **Match Fields** to match the fields in the recipient list with the appropriate fields in the address block.

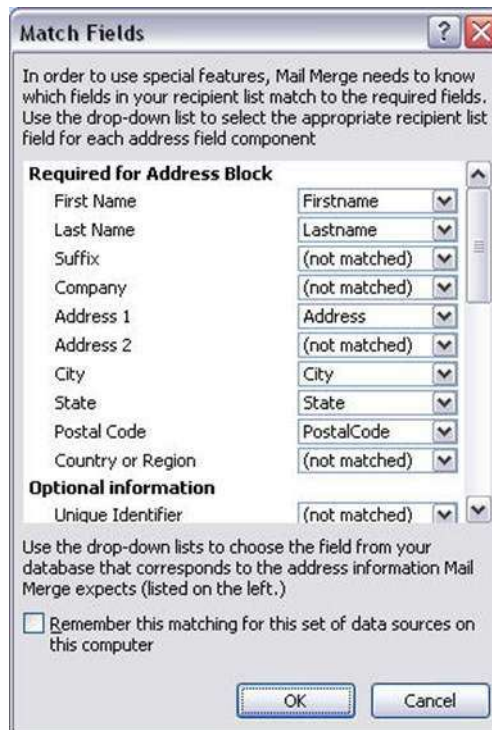


Figure 35—Match Fields

14. Click **OK** to close the *Insert Address block* window.

15. Place your cursor where you want the greeting to appear. Then, select **Greeting line**.

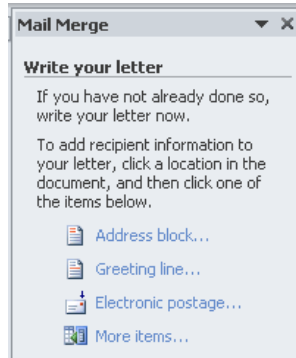


Figure 36—Greeting Line

16. Select the format for your greeting line and then click **OK**.



Figure 37—Insert Greeting Line

17. Type the remainder of your letter.

18. Click **Next** at the bottom of the Task Pane. Your letter and recipient list will be merged, and you will see the first record in the list displayed in the address block and greeting line of the letter.

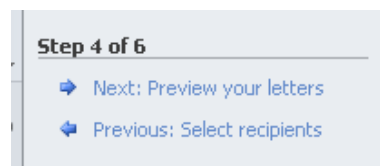


Figure 38—Task Pane

19. Preview your letters and make any necessary changes.

20. Click **Next: Complete the merge**.

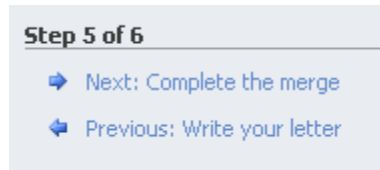


Figure 39—Step 5

21. Click **Print** to merge the letters directly to the printer, or, click **Edit individual letters** to merge the letters to a new document before printing.

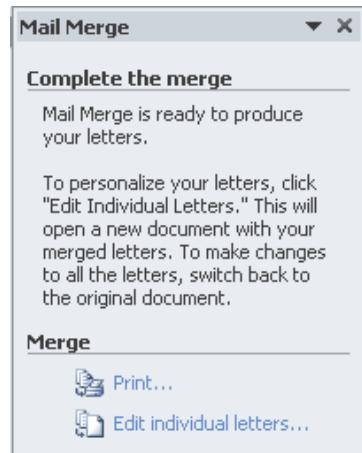


Figure 40—Mail Merge

Collaborating on Documents

Word contains features that make it easy for several people to work on a document together. Rather than passing a hard copy of the document containing manual changes back and forth, you can have Word automatically track the changes, and then you can pass the document electronically.

The collaboration process consists of the following steps:

- Modifying user information
- Tracking changes
- Sending the document for review by others
- Reviewing tracked changes
- Merging document changes

Modify User Information

Each person who will edit the document should make sure that his/her copy of Word is personalized. The “user name” identifies which user has made which changes.

The following explains how to modify user information.

1. Click the **Review** tab.
2. In the **Tracking** group, click **Track Changes**.

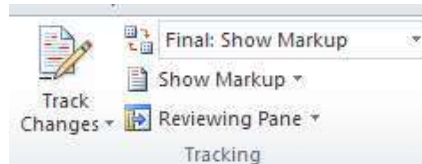


Figure 41—Track Changes

3. In the menu that appears, click **Change User Name**.
4. The **Word Options** window will open. Enter your name and initials in the Personalize section.

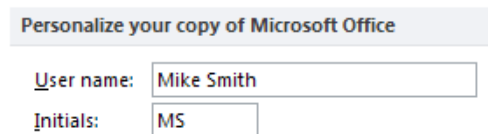


Figure 42—Personalize

5. Click **OK**.

Track Changes

Before you and the others who will collaborate on the document begin tracking changes, you should agree upon the tracking options that you want to use, so that everyone’s markings will be consistent.

1. In the **Tracking** group, click **Track Changes**.
2. Click **Change Tracking Options**.
3. In the **Track Changes Options** dialog box, set the options that you want.
4. Click **OK**.
5. Click **Track Changes**.
6. Click **Track Changes**. Change tracking is now turned on.

Note: You have the option of allowing edit marks to appear within the document either in the text of the document, or in “balloons” in the right margin of the document. To change this setting, click **Show Markup, Balloons**, and then click the option of your choice.

View Changes

You can view the tracked changes in one of two ways:

1. Set the **Display for Review** list for either “Original: Show Markup” or “Final: Show Markup”.

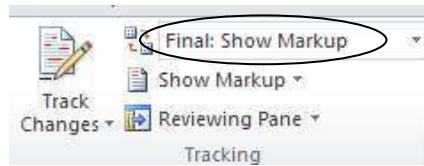


Figure 43—Display for Review

2. Open the **Reviewing Pane** by clicking and selecting the location that you want.

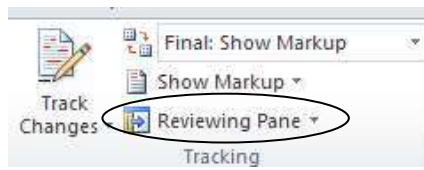


Figure 44—Reviewing Pane

Send Document for Review

You can make the document available to your collaborators by either storing the document on a shared network drive, or, by attaching it to an email. Word enables you to email the document directly from Word, if you like, by doing the following:

1. Click the **File** tab.
2. Click **Save & Send**.
3. Click **Send as Attachment**. Your email program will open, with the document attached.

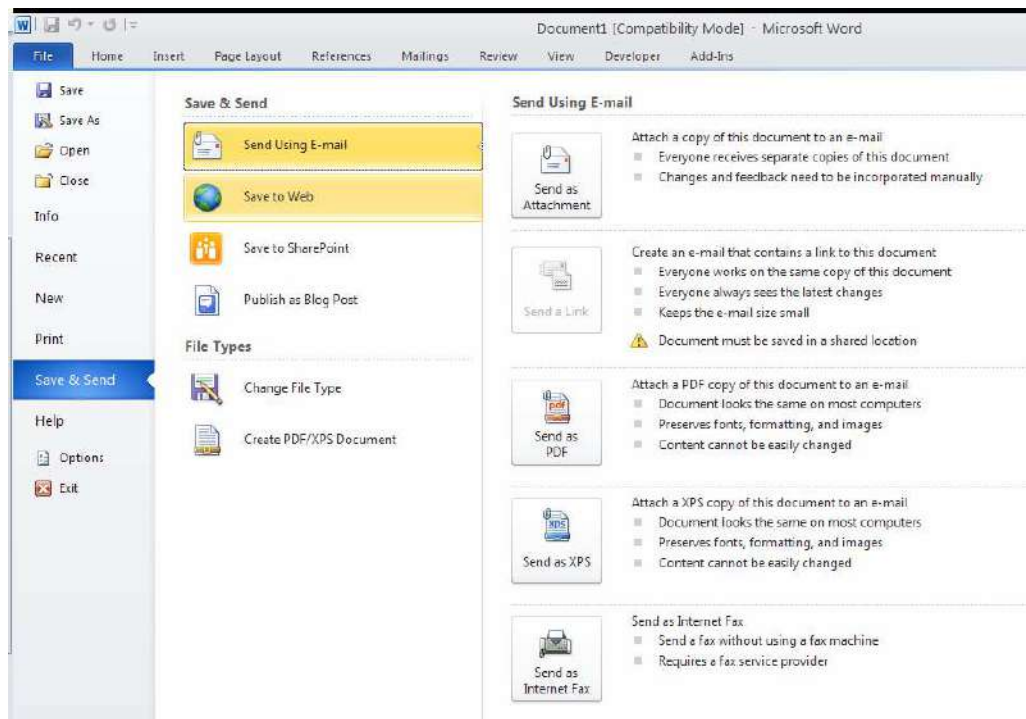


Figure 45—Sending a Document for Review

Merge Document Changes

If you send a document for review to several reviewers, and each reviewer returns the document, you can combine the documents two at a time, and see the changes in a third “combined” document.

Compare Changes

1. On the **Review** tab, in the **Compare** group, click **Compare**.

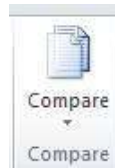


Figure 46—Compare

2. Click **Combine**.
3. Select the original and revised documents from the drop-down lists. If you don't see the documents in the list, click **Browse** and locate the documents.

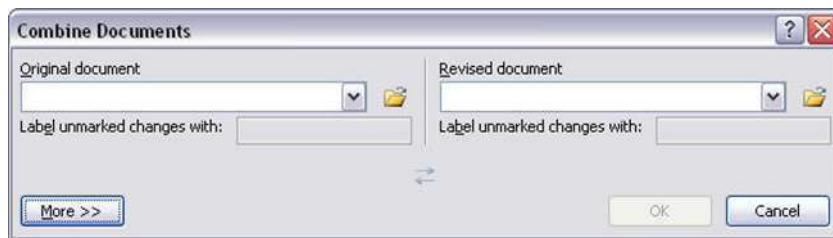


Figure 47—Combine

4. Click the **More >>** button.
5. Select/de-select the options of your choice in the **Comparison settings** and **Show changes** sections.

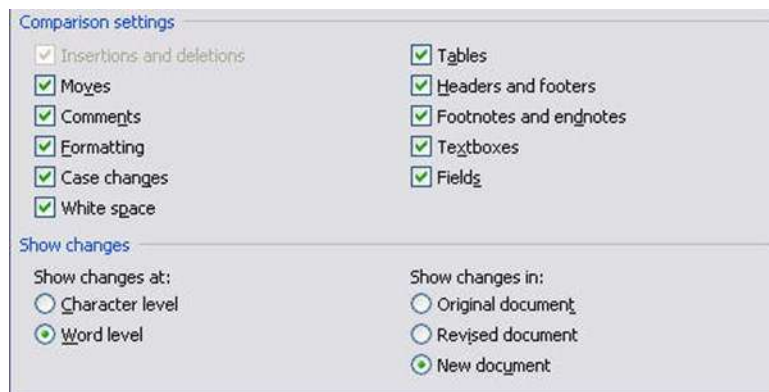


Figure 48—Options

6. Click **OK**.

7. Click **Yes** in the message window that appears.



Figure 49—Message Window

8. A screen will appear that shows three documents (if you chose this option in the **Show changes** section in step # 5): *the Original document, the Revised document, and the New document.*

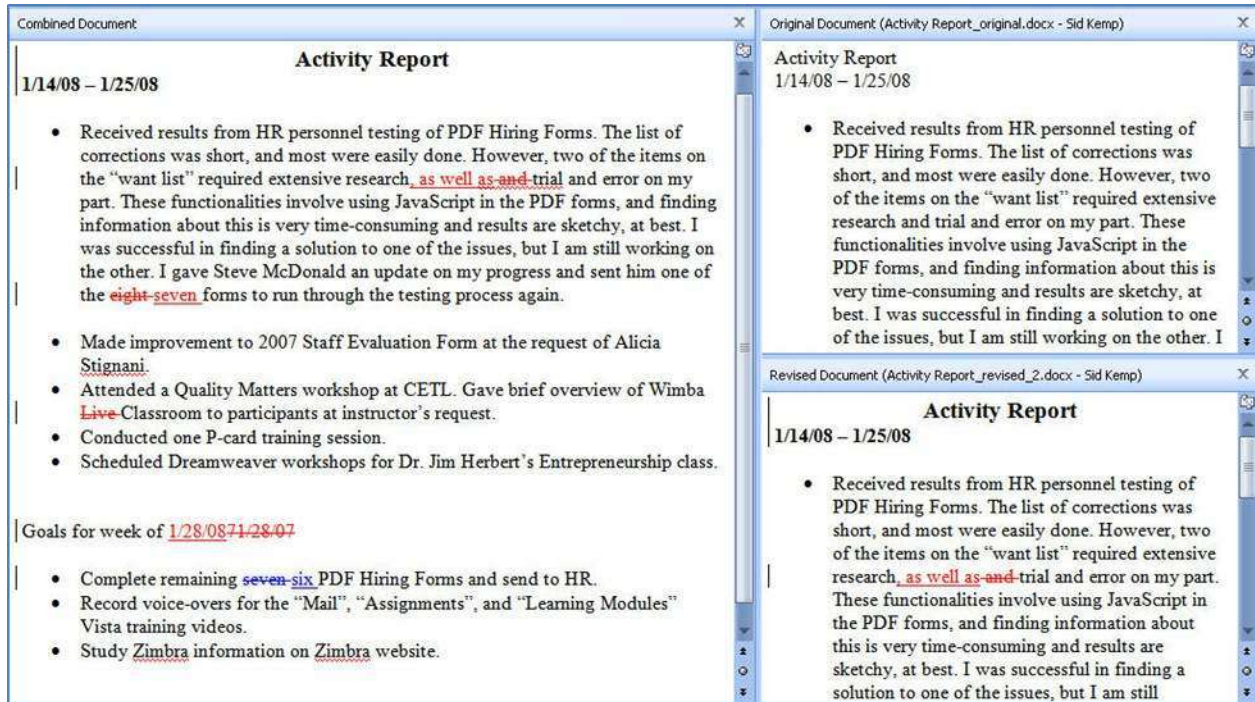


Figure 50—Combined Document

9. The combined document shows all changes that have been made by all reviewers. Hovering the mouse pointer over a change will display a pop-up showing the name of the person who made the change and the date the change was made (see *Figure 51*).

Note: Another way to view changes is by opening the Reviewing Pane (click **Reviewing Pane** in the **Tracking** group).

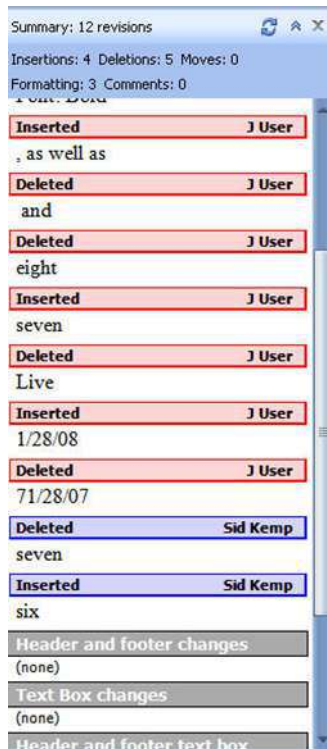


Figure 51—Revisions

Accept/Reject Changes

The following explains how to accept/reject changes:

1. Click to place your cursor at the beginning of the document in the **Combined Document** panel.
2. In the **Changes** group, click **Accept** or **Reject**, and move to the next change.



Figure 52—Accept/Reject Changes

3. Continue this process until you have moved through the entire document.

Combine Changes

Once all changes have been accepted or rejected, the “combined” document can be saved as a separate document. The other documents will remain as they are.