

WORD ADVANCED

FOR LIFELONG LEARNERS



Cochise College
Center for Lifelong Learning

Spring, 2024

Expectations

This class teaches higher-level Word 365/2019 skills. It includes hands-on activities and step-by-step instructions that show how to apply advanced document techniques. By the end of the class, students will feel comfortable using skills like using templates, applying text effects, inserting watermarks and icons, using citations, and linking other Microsoft Office documents. Note: this class covers Microsoft Word 2016, students using Word 365 will notice slight differences.

George R Self
George Self
george@gself.com

INTRODUCTION

Welcome to the Advanced Word Skills Class! This course is designed for those ready to explore the deeper functionalities of Microsoft Word and use them to create professional, polished documents. We'll start with fundamental operations like opening and saving files and quickly advance to more sophisticated features. You'll learn how to insert cross-references¹ for dynamic document navigation, link Excel data to Word for seamless integration, and master document tracking and commenting for collaborative work. Moreover, we'll delve into the creative side of Word, exploring text effects², watermarks³, special symbols, and equation tools⁴. We'll also cover the practical application of templates⁵, hyperlinks⁶, and icons⁷ to enhance your documents. Finally, you'll gain hands-on experience with mail merge⁸, a powerful tool for personalized mass communication. This class aims to not only expand your Word skills but also to inspire you to leverage these tools in your everyday tasks. Let's embark on this journey to mastering advanced Word functionalities together!

FIRST STEPS

ACTIVITY 1: START WORD

1. Enter Word in the search box at the bottom left of the screen.

- 1 **Cross-References:** Elements in a document that refer to other parts of the same document, like figures or chapters, and can be clicked to navigate to the referred item.
- 2 **Text Effects:** Formatting options in Word that add visual flair to text, like shadows, reflections, or glow effects.
- 3 **Watermarks:** Semi-transparent text or images that appear in the background of a document, often used to indicate confidentiality or ownership.
- 4 **Equation Tools:** Features in Word used to insert and edit mathematical equations and symbols.
- 5 **Templates:** Pre-designed document layouts in Word, used to create new documents with a consistent format and design.
- 6 **Hyperlinks:** Elements in a document that link to other documents or web pages, which can be clicked for direct access.
- 7 **Icons:** Small graphical symbols or images used in a document to represent concepts or instructions.
- 8 **Mail Merge:** A feature in Word used to create multiple documents at once, such as letters or labels, where each document contains personalized information from a data source.

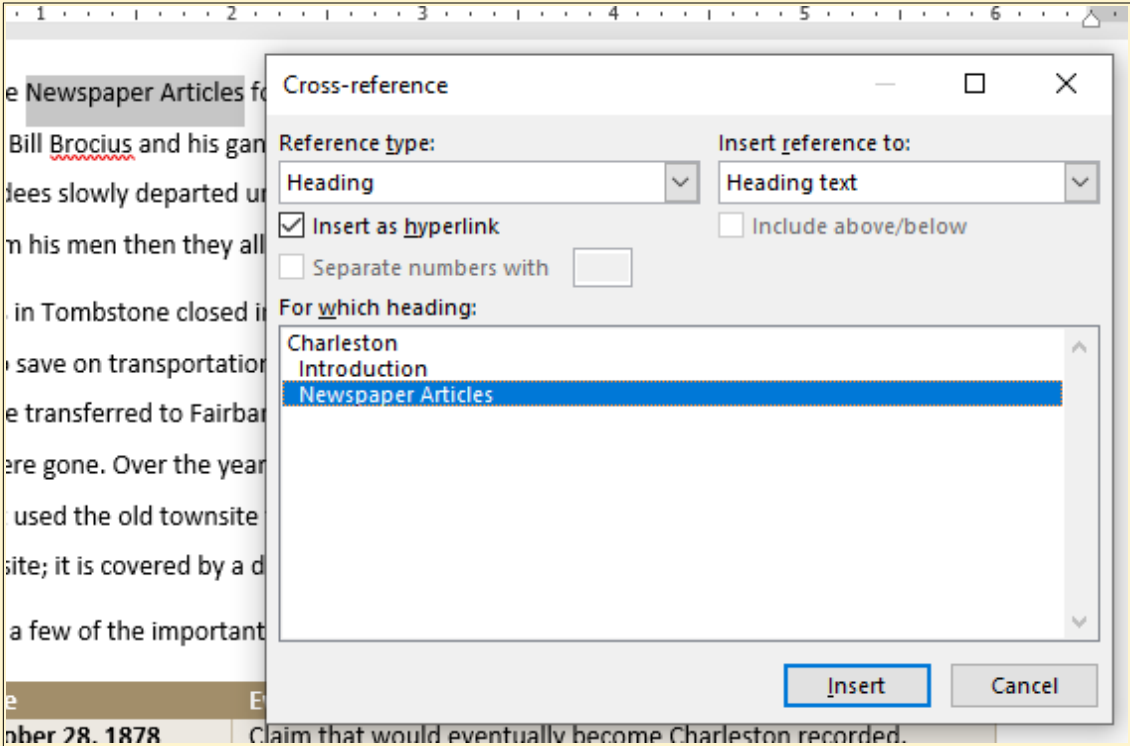
2. After *Word* starts, click **OPEN** on the left-side menu.
3. Click **BROWSE** and navigate to the *Student Files* folder.
4. Click **CHARLESTON03**.
5. Click **OPEN**.
6. Before making changes, save the document with a different name.
 1. Click **FILE** in the top menu.
 2. Click **SAVE AS** from the left-side menu.
 3. Navigate to the *Student Files* folder.
 4. Change the file name to *Charleston-Advanced*.
 5. Click **SAVE**.
7. If line numbers are not already on, complete these steps.
 1. Click **LAYOUT → PAGE SETUP → LINE NUMBERS**.
 2. Choose **CONTINUOUS** to have line numbers on every line.
8. Now, you're all set to explore the advanced features of *Microsoft Word*.

CROSS-REFERENCES

Inserting cross-references in a document is like setting up signposts in a large shopping mall. They guide the reader to the exact store (section) they need without getting lost in the myriad of options.

ACTIVITY 2: INSERT A CROSS REFERENCE

1. Click after the period following the word *there* on *Line 30*.
2. Enter a space, then: *(See the Newspaper Articles for more information.)*
3. Select the words **NEWSPAPER ARTICLES**.
4. Click **REFERENCES → CAPTIONS → INSERT CROSS-REFERENCE**.
5. Select **HEADING → HEADING TEXT → NEWSPAPER ARTICLES**.



6. Click **INSERT**.

7. Click **CLOSE**.

8. Test the new link by pressing **CTRL** and clicking on *Newspaper Articles*.

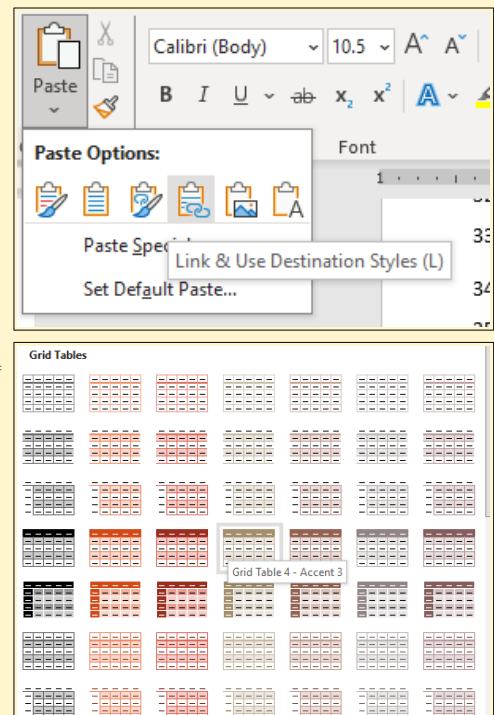
INTEGRATE WORD AND EXCEL

Linking data from Excel to Word is like having a live news feed on your TV. Any updates in the news (Excel data) automatically reflect on your screen (Word document), keeping the information current.

ACTIVITY 3: LINK EXCEL TO WORD

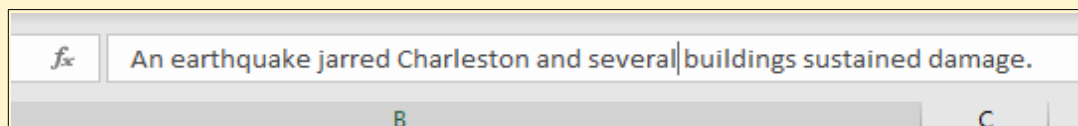
1. Click anywhere in the table on *Line 40*.
2. Click **TABLE LAYOUT → ROWS & COLUMNS → DELETE → DELETE TABLE**.
3. Click in *Line 40* and tap **END**.
4. Tap **ENTER** twice to create two blank lines.
5. Click in *Line 41*.
6. Open *Charleston-Table.xlsx* in the Student Files folder.
7. Complete these steps to link the Excel sheet to the Word document.

- A) In the Excel spreadsheet, select cells **A1** through **B8**.
 - B) Click **HOME → CLIPBOARD → COPY**.
 - C) Return to the Word document.
 - D) Click **HOME → PASTE → LINK & USE DESTINATION STYLES**.
8. Click anywhere in the newly created table.
 9. Select **TABLE DESIGN → TABLE STYLES → GRID TABLE 4 ACCENT 3**.
 10. Click **DATE** in the first column
 11. Click **TABLE LAYOUT** and adjust the width to **1.5"**.
 12. Click **EVENT** in the second column, and set its width to **4.0"**.
 13. Click anywhere in the table
 14. Click **TABLE LAYOUT → TABLE → SELECT → SELECT TABLE**.
 15. Click **HOME → CENTER ALIGN**.
 16. Click **HOME → PARAGRAPH → LINE AND PARAGRAPH SPACING → 1.0**.
 17. Click **HOME → PARAGRAPH → LINE AND PARAGRAPH SPACING → REMOVE SPACE AFTER PARAGRAPH**.
 18. Save *Charleston-Advanced.docx*.



ACTIVITY 4: UPDATE THE EXCEL TABLE

1. Open *Charleston-Table.xlsx* if it's not already open.
2. Click in cell **B7**.
3. In the edit bar at the top of the screen, change *a few* to *several*, transforming the cell into: *An earthquake jarred Charleston, and several buildings sustained damage.*



4. Tap **ENTER**.
5. Open the Word document.
6. Right-click on the table.

7. Select **UPDATE LINK**. Notice that the changed line was updated in Word.
8. Click *Line 43* and tap **DELETE**.
9. Save and close both *Charleston-Table.xlsx* and *Charleston-Advanced.docx*.

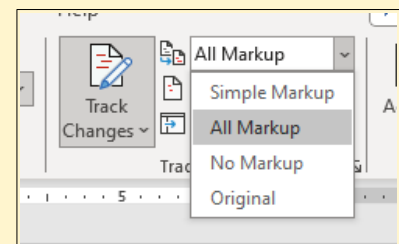
DOCUMENT OPERATIONS

Using Track Changes in Word is like having a surveillance camera in a museum. It records all the changes (edits), providing a history of who did what and when.

ACTIVITY 5: TRACK CHANGES

1. In Word, click **FILE → OPEN**.
2. Click **BROWSE**.
3. Navigate to the Student Files folder and open *Jumping Frog.docx*.
4. click **FILE → SAVE AS**.
5. Enter *My Jumping Frog* as the new file name.
6. Click **SAVE**.
7. Click **REVIEW → TRACKING → TRACK CHANGES⁹**.
8. Click **REVIEW → TRACKING → ALL MARKUP**.
9. Triple-click the first paragraph, starting with *IN ENGLISH...* Tap **DELETE**.
10. The paragraph isn't immediately erased, but marked for deletion.
11. Place the cursor at the start of the second paragraph, starting with *Even a criminal...*
12. Insert *In this country,* (include the space after the comma).
13. Change the capital **E** to a lowercase **e** in *Even*.

Track Changes in Word is like a history teacher – it never lets you forget your past mistakes!



mark twain

~~IN ENGLISH. THEN IN FRENCH. THEN CLAWED BACK INTO A CIVILIZED LANGUAGE ONCE MORE BY PATIENT, UNREMUNERATED TOIL.~~

In this country, ~~E~~ven a criminal is entitled to fair play; and certainly when a man who has done no harm has been unjustly treated, he is privileged to do his best to right himself. My attention has just been

14. Click **REVIEW → TRACKING → REVIEWING PANE → REVIEWING PANE VERTICAL**.
15. Click the first marked-for-deletion paragraph and click **REVIEW → CHANGES → ACCEPT THIS CHANGE**.

- 9 **Track Changes:** A feature in Word that records edits made to a document, allowing users to review, accept, or reject each change.

16. To accept all changes, click **REVIEW → CHANGES → ACCEPT ALL CHANGES**.
17. Close the *Revisions* pane by clicking the **X** in its top right corner.
18. Click **REVIEW → TRACKING → TRACK CHANGES** to turn off tracking.

ACTIVITY 6: CREATE COMMENTS

1. Click anywhere on the second line, which reads *Mark Twain*, and tap **HOME**.
2. Click **REVIEW → COMMENTS → NEW COMMENT**.
3. Enter this in the comment box: *This was written by Mark Twain in 1865*.
4. Tap **CTRL** + **ENTER**.

ACTIVITY 7: ADD A WATERMARK

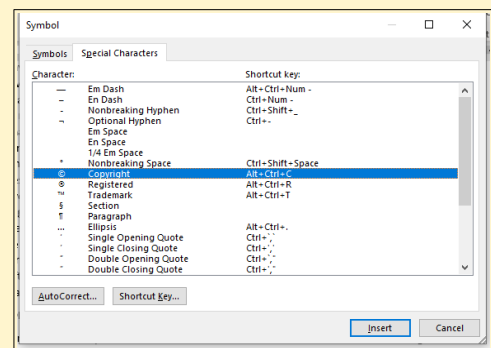
1. Click **DESIGN → PAGE BACKGROUND → WATERMARK**.
2. Choose **DO NOT COPY 1**.
3. Click **DESIGN → PAGE BACKGROUND → WATERMARK → REMOVE WATERMARK**.

Watermarks in a document are like ghosts – slightly scary and mostly transparent!

TEXT OPERATIONS

ACTIVITY 8: ADD A SPECIAL SYMBOL

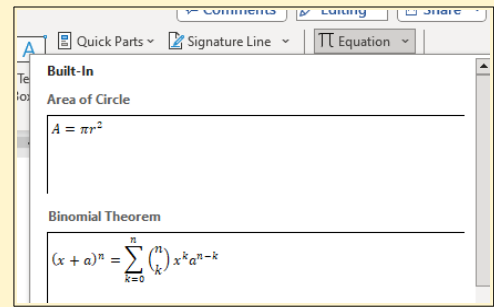
1. Click in the third paragraph, it starts with "THE NOTORIOUS JUMPING..."
2. Tap **END**.
3. Click **INSERT → SYMBOLS → SYMBOL → MORE SYMBOLS**.
4. Click the **SPECIAL CHARACTERS** tab.
5. Click the **COPYRIGHT** symbol.
6. Click **INSERT**.
7. Click **CLOSE**.



ACTIVITY 9: INSERT AN EQUATION

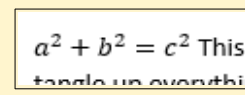
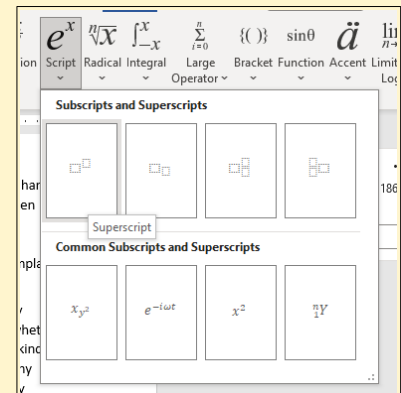
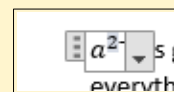
1. Click in the first line of the second paragraph, it starts with "This gentleman's article..."

2. Tap **HOME**.
3. Click **INSERT → SYMBOLS → EQUATION DROPDOWN ARROW → AREA OF CIRCLE**.
4. Click off of the equation, then click just before the word *This* and tap **SPACE**.
5. Click in the equation, then the click the down arrow and **CHANGE TO DISPLAY**.
6. Click on the equation to activate it.
7. Click the three-dot menu on the left of the equation box.
8. Tap **DELETE**.
9. Remove the extra blank line before the paragraph.



ACTIVITY 10: CREATE AN EQUATION

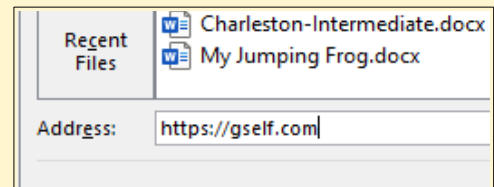
1. Click in the first line of the second paragraph, it starts with "This gentleman's article..."
2. Tap **HOME**.
3. Click **INSERT → SYMBOLS → EQUATION DROPDOWN ARROW → INSERT NEW EQUATION**.
4. Click **EQUATION → STRUCTURES → SCRIPT → SUPERSCRIPT**.
5. Enter a^2 into the two text boxes.
6. Tap **RIGHT ARROW**.
7. Tap the plus key (+).
8. Insert b^2 in the equation, using the same process used to enter a^2 .
9. Tap **RIGHT ARROW**.
10. Tap the equal key (=).
11. Finish entering the equation as illustrated on the right.
12. Click off of the equation, then click the equation again to activate it.
13. Click the three-dot menu on the left of the equation box.
14. Tap **DELETE**.



ACTIVITY 11: INSERT A HYPERLINK

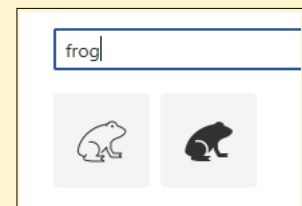
1. Click in the first line of the second paragraph, it starts with "This gentleman's article..."

2. Tap **HOME**.
3. Type <https://gself.com> into the document. As a space is added after the URL, Word identifies it as a hyperlink and formats it properly.
4. Select [HTTPS://GSELF.COM](https://gself.com) and tap **DELETE**.
5. Rewrite the URL as gself.com without the `https://` prefix, and leave a space afterward.
6. Select [GSELF.COM](https://gself.com).
7. Click **INSERT → LINKS → LINK**.
8. Enter <https://gself.com> into the address box.
9. Click **OK**.
10. Test the hyperlink by holding **CTRL** while you click the link.
11. Select the hyperlink and tap **DELETE**.



ACTIVITY 12: INSERT AN ICON

1. Click in the first line of the first paragraph, it starts with "In this country..."
2. Tap **HOME**, as if you're setting the stage for a tale of artistry.
3. Click **INSERT → ILLUSTRATIONS → ICONS**.
4. In the Icon selection box, search for *frog*.
5. Click either frog icon.
6. Click **INSERT**.
7. Using the *Graphics Format* tab, resize, color, and modify the icon as desired.
8. Click the icon to activate the drag handles.
9. Click the **LAYOUT OPTIONS** button at the top right corner of the icon.
10. Choose the first *Text Wrapping* option: **SQUARE**.
11. Click anywhere away from the *Layout Options* box to close it.



ACTIVITY 13: APPLY TEXT EFFECTS

1. Triple-click the document title.
2. Click **HOME → FONT → TEXT EFFECTS AND TYPOGRAPHY**.
3. Hover the mouse over each effect and notice the change to the title.

Using Text Effects
is how words dress
to impress!

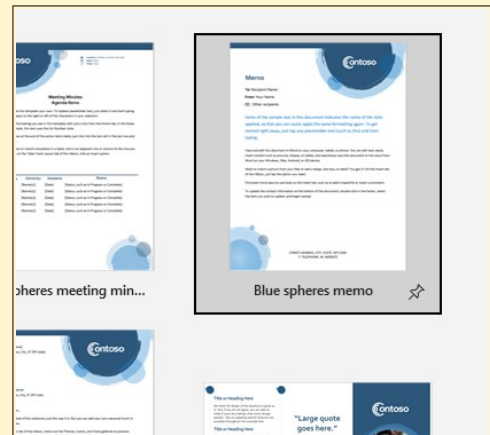
4. Click the desired effect to change the title.
5. Save and close *My Jumping Frog.docx*.

ADVANCED OPERATIONS

Choosing a template in Word is like picking a pre-built house in a housing development. Just as the house has rooms and fixtures already in place, the template provides a structured layout and design, allowing you to move in and personalize it with your content.

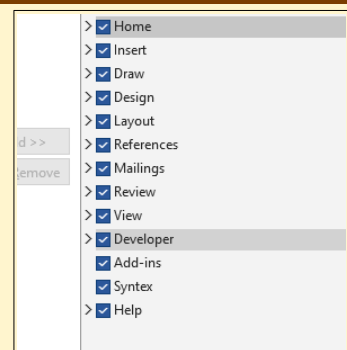
ACTIVITY 14: SELECT A TEMPLATE

1. Click **FILE → NEW**.
2. Enter *Blue spheres* in the *Search for online templates* box.
3. Click **BLUE SPHERES MEMO**.
4. Click **CREATE**.
5. With *Memo.docx* open, click **FILE**.
6. Click **SAVE AS**.
7. Click **BROWSE** and choose the **STUDENT FILES** folder.
8. Save the file with a *File Type* of a Word Template (*.dotx). A caution message pops up, but ignore it and ensure the template's destination is the *Student Files* folder.
9. Enter the name *Memo.docx* for the new file.



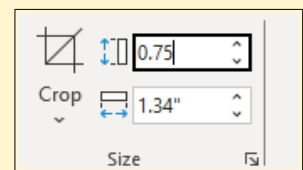
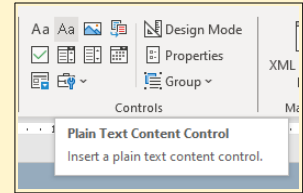
ACTIVITY 15: MODIFY A TEMPLATE

1. **FILE → OPTIONS → CUSTOMIZE RIBBON**
2. Activate the *Developer* ribbon¹⁰ item by checking that box.
3. Click **OK**.
4. Click the document title, **MEMO**, and change it to *Memo Subject*.
5. Transform the words *Memo Subject* into a text field by triple-clicking and then click **DEVELOPER → CONTROLS → PLAIN TEXT CONTENT CONTROL**.



10 Developer Ribbon: A tab in Word that contains advanced tools for document customization.

6. Click the paragraph that starts *Some of the sample text*, then tap **DEL** two times.
7. Click the paragraph that reads *View and edit*, and type *Memo body*.
8. Click **MEMO BODY → DEVELOPER → CONTROLS → PLAIN TEXT CONTENT CONTROL**.
9. Save the document.
10. Double-click the *Contoso* logo in the document's header.
11. Right-click the *Contoso* logo and click **CHANGE PICTURE → THIS DEVICE**.
12. Select **WEBWORX.PNG** from the *Student Files* folder.
13. The logo needs resizing, so click **PICTURE FORMAT → SIZE** and adjust its height to *0.75"*.
14. Click **HEADER & FOOTER → NAVIGATION → GO TO FOOTER**.
15. Enter *123 Main Street, Sierra Vista, AZ 85635*. Also, enter *(520) 123-4567* and *webworx.com*.
16. Click **HEADER & FOOTER → CLOSE → CLOSE HEADER AND FOOTER**.
17. Save and close the document.



ACTIVITY 16: USE A TEMPLATE

1. Open the *File Explorer*.
2. Navigate to the *Student Files* folder and double-click *memo.dotx*.
3. Click **MEMO SUBJECT** and rename it to *Company Picnic*.
4. Click **MEMO BODY** and enter: *Don't forget the picnic this week!*
5. Click **FILE** and **SAVE AS**.
6. Navigate to the *Student Files* folder and save it as a Word document named *Picnic.docx*.

Company Picnic

To: Recipient Name

From: Your Name

CC: Other recipients

Don't forget the picnic this week!

SAVE AS PDF¹¹

ACTIVITY 17: SAVE A PDF VERSION

1. Click **FILE** and **SAVE A COPY**.
2. Keep the name *Picnic* but select **PDF** as the document type.
3. Click **SAVE**.
4. Close both *Picnic.pdf* and *Picnic.docx*.

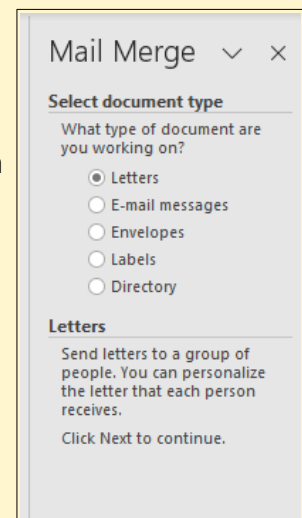
MAIL MERGE

Using Mail Merge in Word is like being a chef who prepares a large banquet. Each dish (document) is tailored to the guest's (recipient's) taste, but you cook (create) them all at once, saving time and effort.

ACTIVITY 18: CREATE A MAIL MERGE DOCUMENT

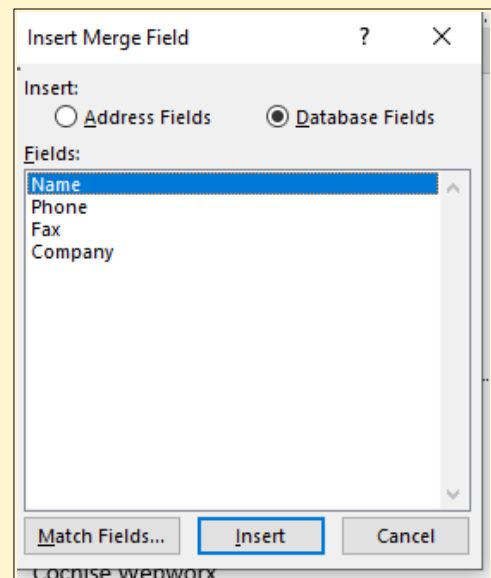
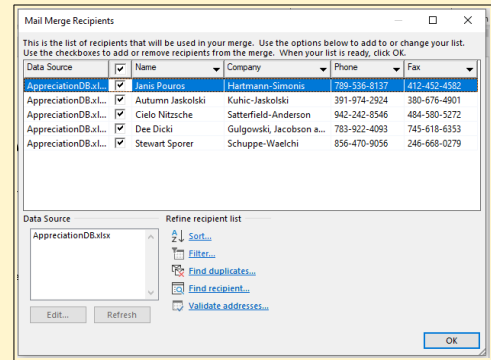
1. Click **FILE** and **OPEN**.
2. In the *Student Files* folder, find *Appreciation.docx*.
3. Click **OPEN**.
4. Click **FILE** and **SAVE AS**.
5. Navigate to the *Student Files* folder.
6. Name the document *MyFax* and click **SAVE**.
7. Click **MAILINGS** → **START MAIL MERGE** → **STEP-BY-STEP MAIL MERGE WIZARD**.
 - A) In the first step, select **LETTERS**, then click **NEXT**.
 - B) In the second step, click **USE THE CURRENT DOCUMENT**, then click **NEXT**.
 - C) In the third step, select **USE AN EXISTING LIST**.
 - D) Click **BROWSE** and navigate to the *Student Files* folder to find **APPRECIATIONDB**.
 - E) Click it and **OPEN**.
 - F) In the *Select Table* dialog box, choose **FAX DATA** and **OK**.
 - G) Make certain all the names in the table are checked.

Why don't we trust Mail Merge with secrets? Because it always spreads the word!



¹¹ **PDF (Portable Document Format):** A file format used to present documents independently of software, hardware, or operating systems.

- H) Click **OK**.
8. Click **NEXT**.
 9. Double-click **NAME** beside the *To* line.
 10. Click **MORE ITEMS** in the Wizard.
 11. Highlight the word **NAME** and click **INSERT**.
 12. Click **CLOSE**.
 13. Double-click **PHONE** beside the *Phone* line.
 14. Click **MORE ITEMS** in the Wizard.
 15. Highlight the word **PHONE** and click **INSERT**.
 16. Click **CLOSE**.
 17. Double-click **FAX** beside the *Fax* line.
 18. Click **MORE ITEMS** in the Wizard.
 19. Highlight the word **FAX** and click **INSERT**.
 20. Click **CLOSE**.
 21. Double-click **COMPANY** beside the *Company Name* line.
 22. Click **MORE ITEMS** in the Wizard.
 23. Highlighting the word **COMPANY** and click **INSERT**.
 24. Click **CLOSE**.
 25. Click **NEXT**.
 26. Click the arrows beside **RECIPIENT: 1** and scroll through the five recipients.
 27. This particular activity doesn't require printing, so click the **X** in the top-right corner of the Wizard to close it.
 28. Save and close *My Fax*.



SUMMARY

Congratulations on completing the Advanced Word Skills Class! You've now mastered a wide array of sophisticated features that will greatly enhance your document creation and management abilities. From skillfully integrating Word with Excel to expertly tracking changes and creating comments, your newfound skills open up a world of possibilities for effective and efficient document handling. The use of advanced formatting options like text effects, watermarks, and icons will add a professional flair to your work. Remember, these tools are

not just for learning; they are practical skills you can apply in your everyday tasks, whether for personal projects, professional reports, or creative endeavors. Keep exploring and applying these advanced features to make your documents stand out and your workflow more seamless. Your journey with Word doesn't end here—it's just the beginning of a more skilled and confident you in the realm of document creation and management!

