Advanced Microsoft Word 365 Training

with examples and
hands-on exercises

WEBUCATOR

Copyright © 2024 by Webucator. All rights reserved.

No part of this manual may be reproduced or used in any manner without written permission of the copyright owner.

Version: 1.0.1

The Authors

Dave Dunn

Dave Dunn was the CEO of Webucator for over 10 years and is now on Webucator's board. He initially joined Webucator in 2009 after serving as a CFO and COO for numerous small and medium-sized companies, including Summit Software Company, Insight Research Group, Avalon Consulting, and HealthcareOne. Dave received his Bachelor of Arts from Hamilton College and his MBA from Syracuse University. He has served as Chairman of the Board of the Montessori School of Syracuse since 2001.

Tracy Berry (Editor)

Since starting her training career in 1993, Tracy Berry has helped countless people learn new skills and develop professionally. She was an early adopter of virtual training and has delivered over 1,600 virtual classes for Webucator since 2007. She teaches hundreds of classes each year, covering all Microsoft Office products and versions, including SharePoint and Project, along with a wide range of soft skills courses, including time management, stress management, interpersonal communications, and decision support. Tracy is also the co-author of many of Webucator's Microsoft Office, SharePoint, and Adobe courses. Known for her vibrant teaching style, Tracy ensures her classes are engaging, interactive, and far from monotonous, encouraging students to participate actively. Testimonials from her students frequently commend her for making learning an enjoyable and enriching experience, highlighting her enthusiasm, subject matter expertise, and genuine love for teaching and her students. Tracy is a Certified Technical Trainer. Her average instructor evaluation is 9.6 out of 10.

In addition to her training, Tracy is a graphic designer/programmer and consultant and has developed hundreds of logos, marketing materials, websites, and multimedia solutions for customers worldwide. She has been involved in large corporate software rollouts and helped many organizations optimize and streamline data solutions.

Nat Dunn (Editor)

Nat Dunn is the founder of Webucator (www.webucator.com), a company that has provided training for tens of thousands of students from thousands of organizations. Nat started the company in 2003 to combine his passion for technical training with his business expertise, and to help companies benefit from both. His previous experience was in sales, business and technical training, and management. Nat has an MBA from Harvard Business School and a BA in International Relations from Pomona College.

Follow Nat on Twitter at @natdunn and Webucator at @webucator.

Margaux Judge (Editor)

Margaux Judge has worked as an e-learning editor and instructional designer for over ten years, writing and editing a wide variety of courses, from technical topics to soft skills. She has a Bachelor's degree

in English and Textual Studies from Syracuse University and a Master's degree in Television Writing from Boston University.

Class Files

Download the class files used in this manual at https://static.webucator.com/media/public/materials/classfiles/WRD365.3-1.0.1-advanced-microsoft-word-365-training.zip.

Errata

Corrections to errors in the manual can be found at https://www.webucator.com/books/errata/.

Table of Contents

LESSON 1. Working with Long Documents....1
Adding a Table of Contents....1
Updating the Table of Contents....3
Deleting the Table of Contents....4
Exercise 1: Insert and Update a Table of Contents....6
Cross References....7
Footnotes and Endnotes....9
Exercise 2: Working with Footnotes....13
Inserting Citations and a Bibliography....14
Exercise 3: Insert Citations and a Bibliography....18
Adding an Index....19
Exercise 4: Inserting an Index....23
Inserting a Table of Figures....23
Inserting and Updating a Table of Authorities....25
Using Bookmarks....26
Go To Feature....30
LESSON 2. Reviewing and Collaborating on Documents....33
Adding Comments....33
Exercise 5: Adding Comments to a Document....37
Tracking Changes....38
Exercise 6: Tracking Changes....41
Viewing Changes....42
Exercise 7: Viewing Markup....45
Accepting and Rejecting Changes....46
Exercise 8: Accepting and Rejecting Changes....48
Sharing....53
LESSON 3. Comparing and Combining Documents....57
Comparing Documents....57
Exercise 9: Comparing Documents....61
Combining Documents....61
Exercise 10: Combining Documents....64

LESSON 4. Forms....67
Showing the Developer Tab....67
Exercise 11: Date Picker Content Control....71
Exercise 12: Plain Text Content Control....74
Exercise 13: Drop-Down List Content Control....76
Exercise 14: Check Box Content Control....80
Exercise 15: Rich Text Content Control....82
Exercise 16: Restricting Editing to Form Fields....84
LESSON 5. Managing Mailings....87
Creating Envelopes and Labels....87
Exercise 17: Printing an Envelope....98
Using Mail Merge....98
Exercise 18: Using Mail Merge....111
LESSON 6. Protecting Documents....113
Marking Documents Final....113
Password Protect Word Documents....115
Removing Metadata from Files....117
Restrict Formatting and Editing....120
Exercise 19: Protecting a Document....126
Adding Watermarks....126
Exercise 20: Adding Custom Watermarks....130
LESSON 7. Macros....131
Using Macros....131
Exercise 21: Recording a Macro....138

LESSON 1
Working with Long Documents

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Table of contents.

☑ Footnotes and endnotes.

☑ Citations.

☑ Creating a bibliography.

☑ Marking entries.

☑ Inserting an index.

Introduction

In this lesson, you will learn to add a table of contents to a document, to update the table of contents, to add footnotes, endnotes, citations, and a bibliography to a document, to mark entries in a document, and to insert an index.

EVALUATION COPY: Not to be used in class.

1.1. Adding a Table of Contents

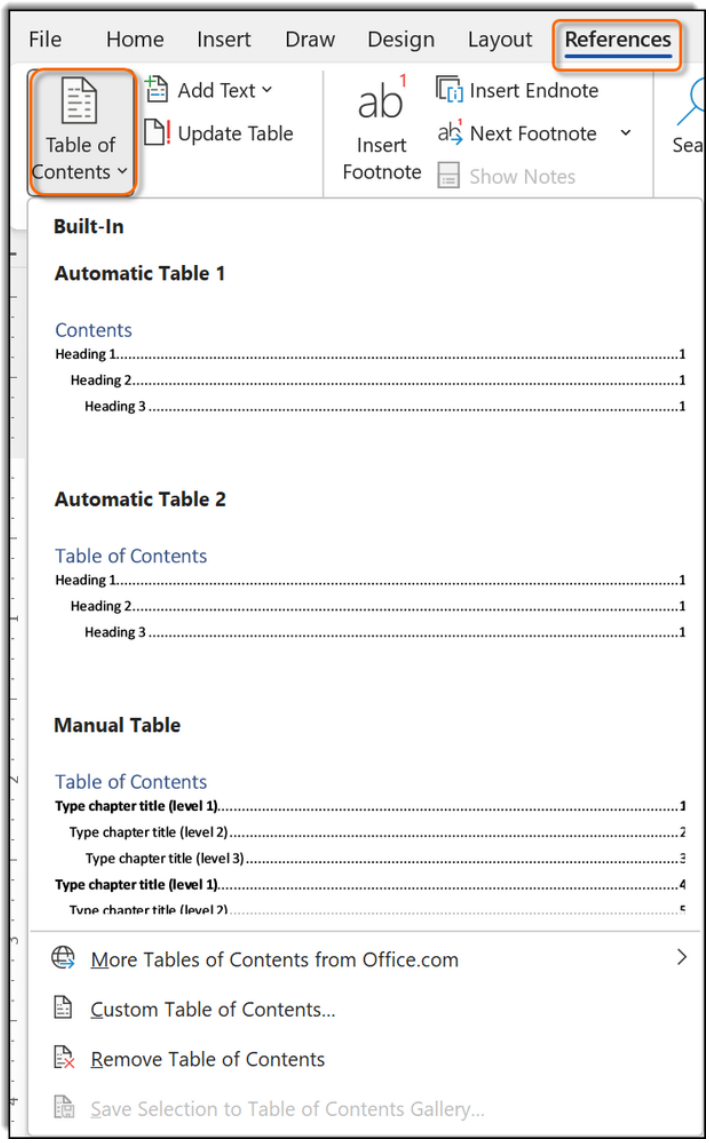
Table of contents entries are automatically marked when Heading Levels are applied within a document. Text with the *Heading 1* style applied to it automatically becomes a top-level entry within the table of contents. Text with the *Heading 2* style applied to it automatically becomes a second-level entry.

EVALUATION COPY: Not to be used in class.

You can add a table of contents even if you haven't applied heading levels in your document, but it's a little more work. You would have to manually enter the headings and page numbers, and the **Update Table** function, described below, is not available. This will be explained in more detail later in this lesson.

To add a table of contents to a Microsoft Word document:

1. Place your cursor in your document where you would like the table of contents to appear.
2. Click the **References** tab and from the **Table of Contents** group, click **Table of Contents** and select one of the options from the drop-down menu:



EVALUATION COPY: Not to be used in class.

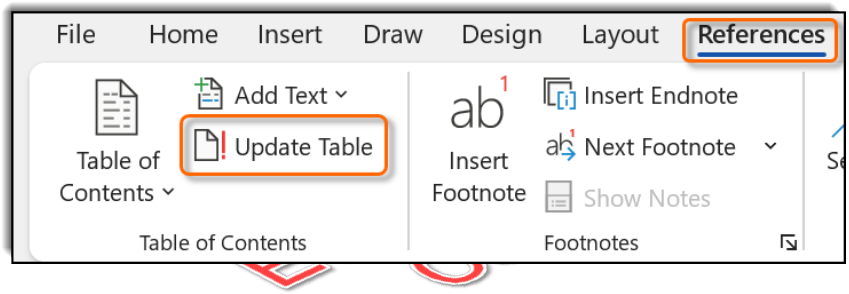
The table of contents will be inserted. Note that you can **Ctrl + Click** on the headings or page numbers in the table of contents to go to those sections of the document.

EVALUATION COPY: Not to be used in class.

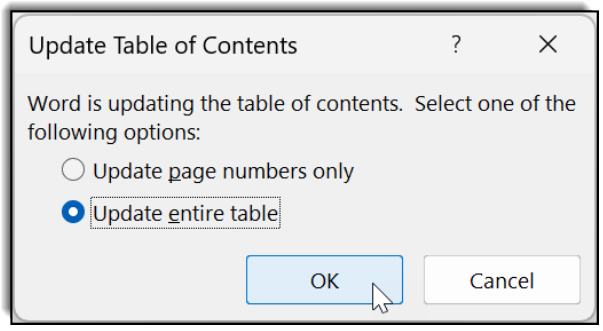
1.2. Updating the Table of Contents

The table of contents does not automatically update as you make changes in your document, but updating it is simple:

1. On the **References** tab in the **Table of Contents** group, click **Update Table**:



2. In the dialog box that appears, choose to update page numbers only or update the entire table and then click **OK**:



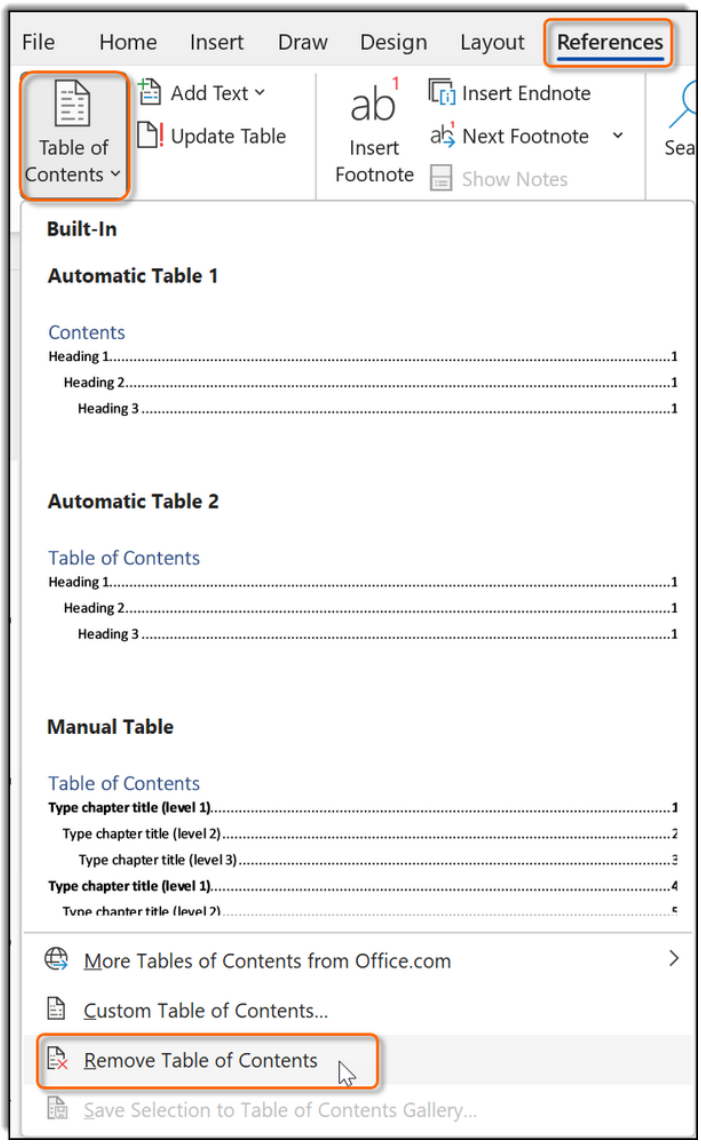
If you have added any headings to your document, you should update the entire table.

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

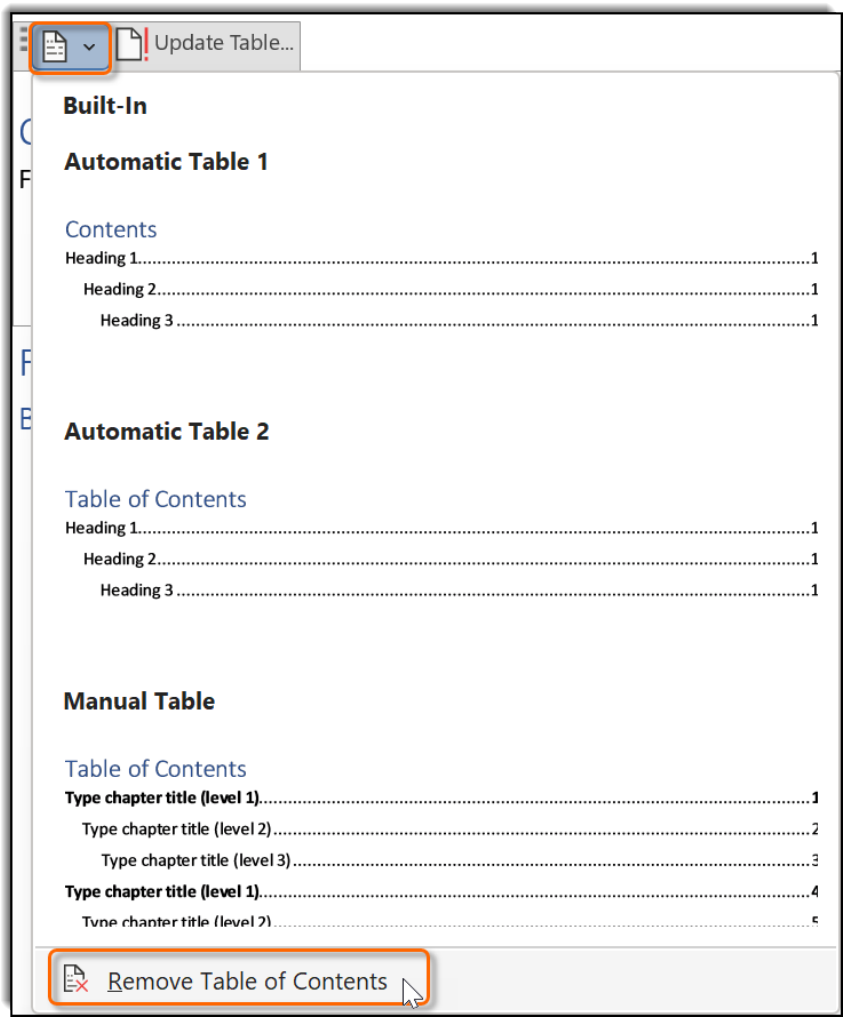
1.3. Deleting the Table of Contents

To delete a table of contents from a Microsoft Word document, click **Table of Contents** in the **Table of Contents** group on the **References** tab and select **Remove Table of Contents**:



You can also remove a table of contents by hovering over it, clicking the TOC icon in the upper left and selecting **Remove Table of Contents**:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

Exercise 1: Insert and Update a Table of Contents

5 to 15 minutes

In this exercise, you will insert a table of contents into a document, make a change to the document and then update the table of contents.

1. Navigate to the `word365-long-docs/Exercises` folder and open `PlantsInMyYard.docx`.
2. Add a **Automatic Table 2** table of contents on the page following the cover page.
3. Insert a page break between the table of contents and the first heading (**Trees**).

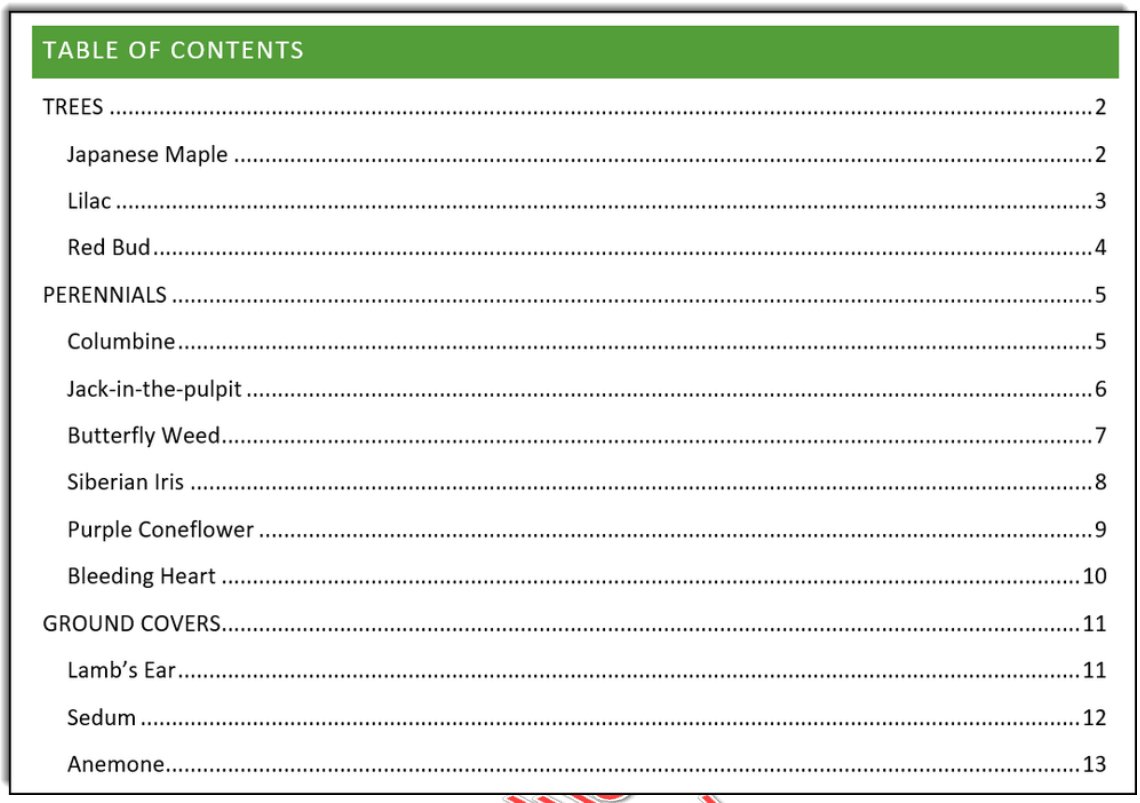
Evaluation Copy

Page Break Shortcut Key
A quick way to insert a page break is to place the cursor where you want the break and press **Ctrl + Enter**.

4. Update the table of contents to reflect the updated page numbers.

Your table of contents should look like this:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

1.4. Cross References

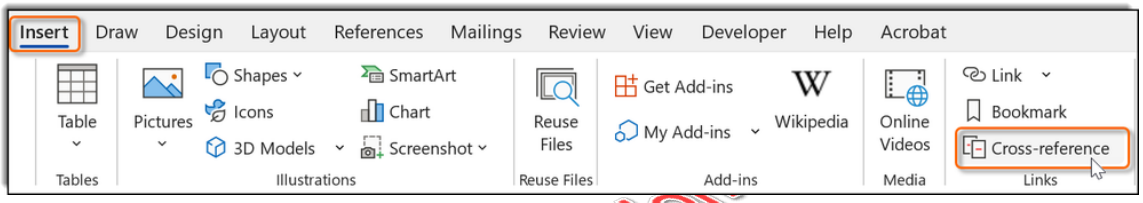
A cross-reference is a reference from one location of a document to another location. Among other things, you can use them to reference:

1. Numbered Items (usually a page number)
2. Headings
3. Bookmarks
4. EndNotes
5. Figures

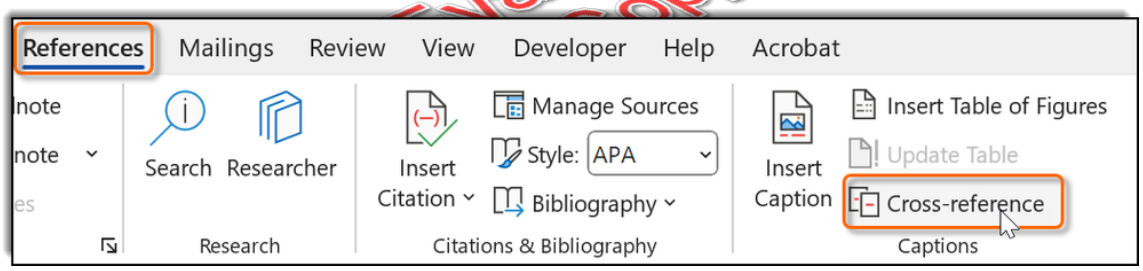
To create a cross-reference:

EVALUATION COPY: Not to be used in class.

1. Put your cursor where you want the cross-reference to appear.
2. On the **References** tab, in the **Captions** group, click **Cross-reference**:

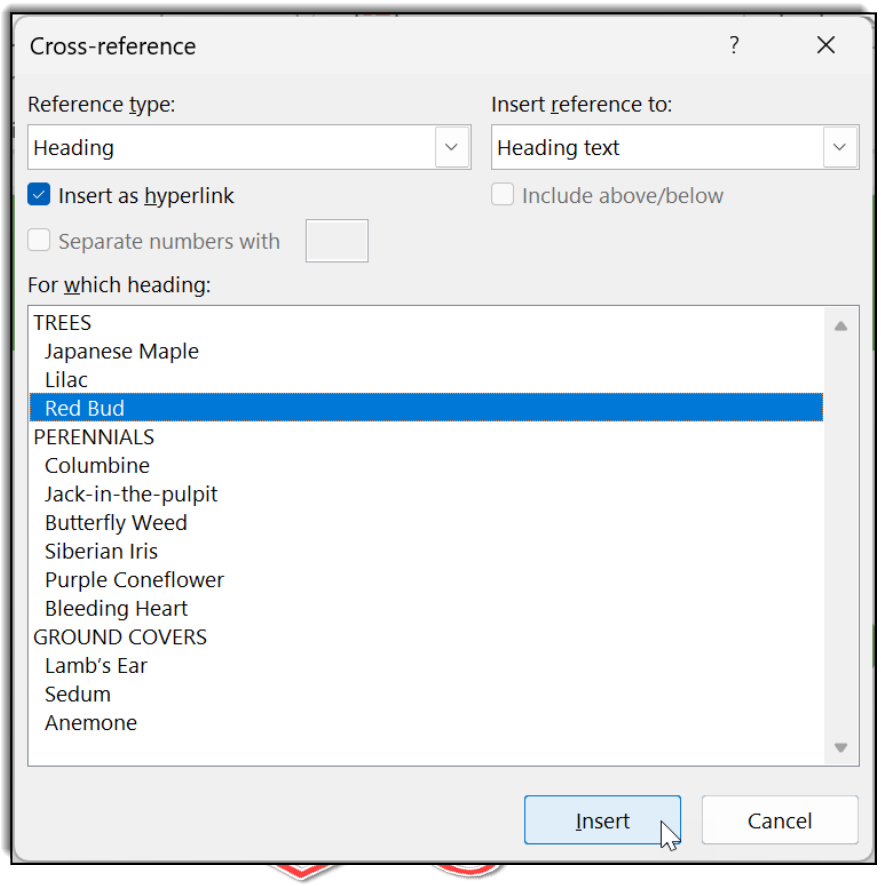


You can also open the **Cross-reference** dialog in the **Captions** group of the **References** tab:



3. In the **Cross-reference** dialog, select the reference type and other options:

EVALUATION COPY: Not to be used in class.



A. When you insert the reference, you can choose the type of text used from the **Insert reference to** field. For example, if your text reads "Unlike the Lilac…", you could make "Lilac" reference the "Lilac" heading by selecting "Heading Text". Alternatively, you could write "Unlike the Lilac (see page 3)…", where "3" is a reference to the page number that the "Lilac" heading appears on. In this case, you would select "Page Number" in the **Insert reference to** field.

B. In the **For which…** section, select the item you want to reference and click **Insert**.

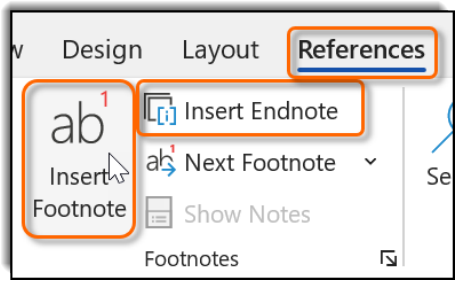
EVALUATION COPY: Not to be used in class.

1.5. Footnotes and Endnotes

To insert footnotes or endnotes into a Microsoft Word document:

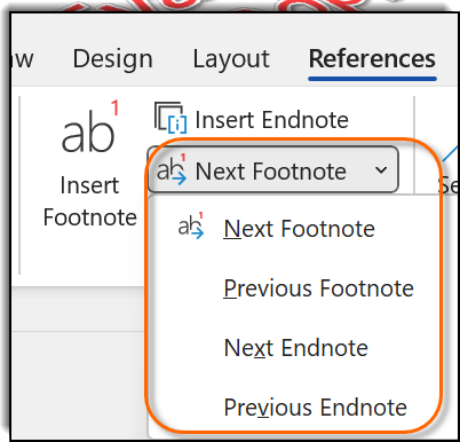
EVALUATION COPY: Not to be used in class.

1. Place your cursor in your document where you would like the symbol representing the footnote to appear.
2. On the **References** tab in the **Footnotes** group, click **Insert Footnote**:



3. A reference to the footnote/endnote will appear at the cursor location, and focus will move to the note location, so that you can enter the note.
    A. Footnotes are added in the footer of the page.
    B. Endnotes will be added at the end of the document.

Use the **Next Footnote** dropdown to navigate between footnotes and endnotes:



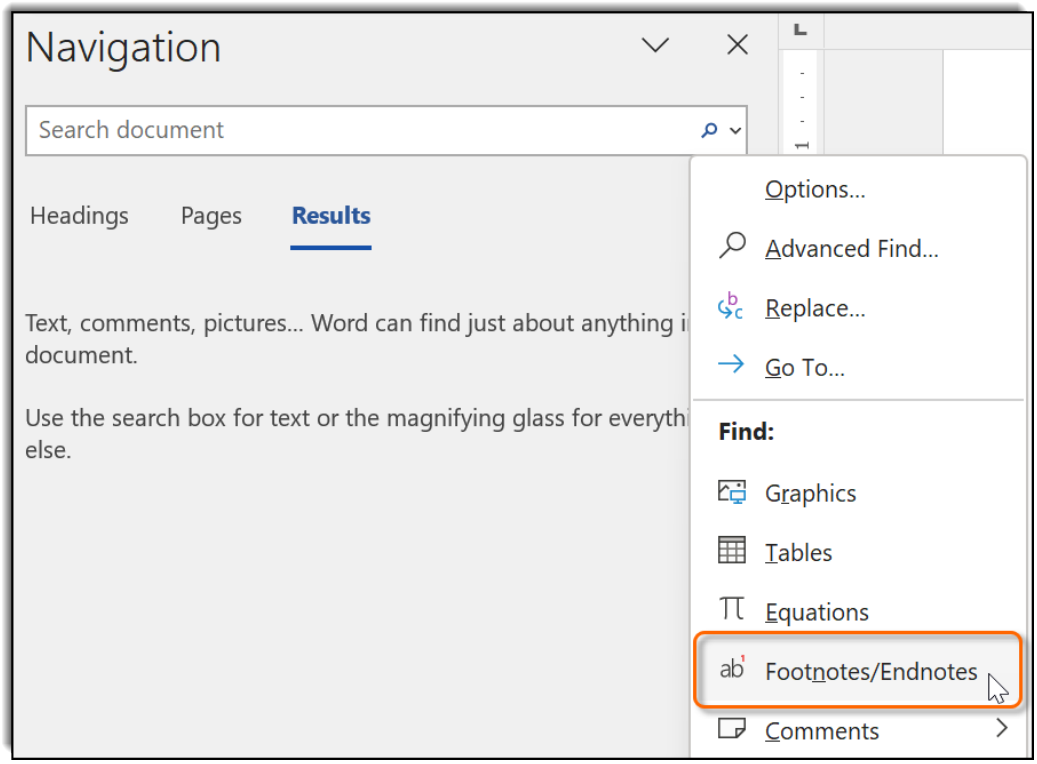
If you are in the body of the document, clicking these commands will take you to the next and previous markers. If you are in the notes themselves, clicking these commands will take you to the next and previous notes.

To jump from a footnote or endnote marker to the actual note, double-click the marker. To jump back to the body, double-click the number of the note.

EVALUATION COPY: Not to be used in class.

Footnotes, Endnotes, and the Navigation Pane

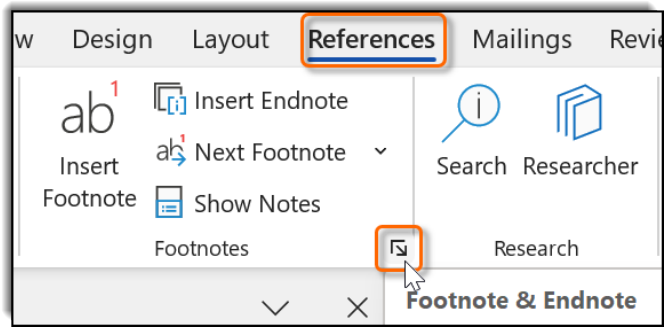
You can also move between and search footnotes and endnotes using the **Navigation** pane:



❖ 1.5.1. Customizing Footnotes and Endnotes

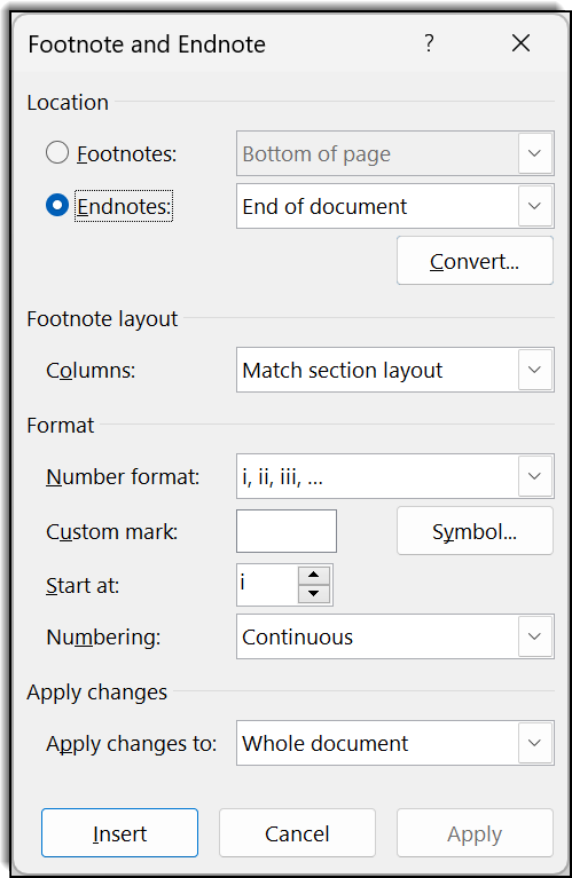
You can choose how and where footnotes and endnotes are located, how to format the numbers, and more. To do so:

1. Click the **Dialog Box Launcher** in the lower right corner of the **Footnotes** group.



EVALUATION COPY: Not to be used in class.

2. Choose the options you prefer in the **Footnote and Endnote** dialog box:



Take a Few Minutes

Take a few minutes to look at the options available in the **Footnote and Endnote** dialog box.

EVALUATION COPY: Not to be used in class.

Exercise 2: Working with Footnotes

10 to 20 minutes

In this exercise, you will add footnotes to a document and then move between the footnotes within the document.

Tip

During this exercise, use the Navigation Pane to navigate to the different sections.

1. If it's not still open, open `PlantsInMyYard.docx` from the `word365-long-docs/Exercises` folder.
2. Add the following footnotes to your document:
   A. **Japanese Maple**: in the *Special Features* section, after the words "Beautiful foliage" add a footnote stating "In the opinion of course author, Dave Dunn."
   B. **Red Bud**: in the *Special Features* section, after the words "Deer Resistant" add a footnote stating "Given the increasing deer population in New York State, even deer resistant plants are sometimes devoured by deer."
   C. **Butterfly Weed**: at the end of the Description, add a footnote stating "Butterfly weed is commonly found along roadways in New York State."
3. Use the Footnotes commands to move to:
   A. Footnote #1, within the document.
   B. Footnote #3, within the document.
   C. Footnote #2, within the footnote itself.
4. Save the document as we will continue to build on this document in future exercises.

Evaluation Copy

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

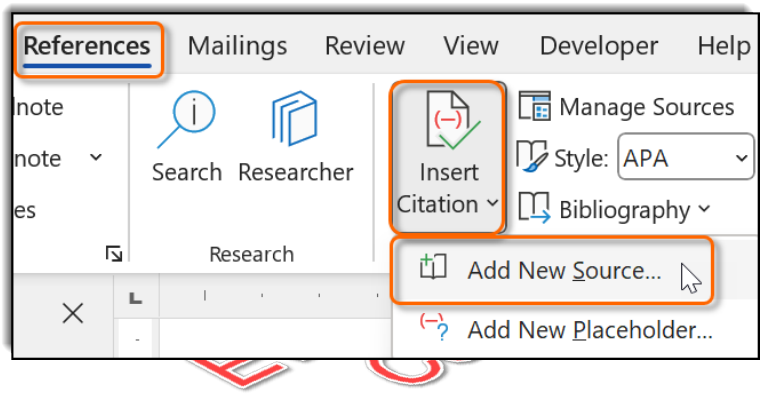
1.6. Inserting Citations and a Bibliography

Citations can be inserted into a document at any point and changed or updated at a later time, and sources entered in one document are available in other documents, so you don't have to re-enter them. Also, you can easily select or change the style you apply to your citations.

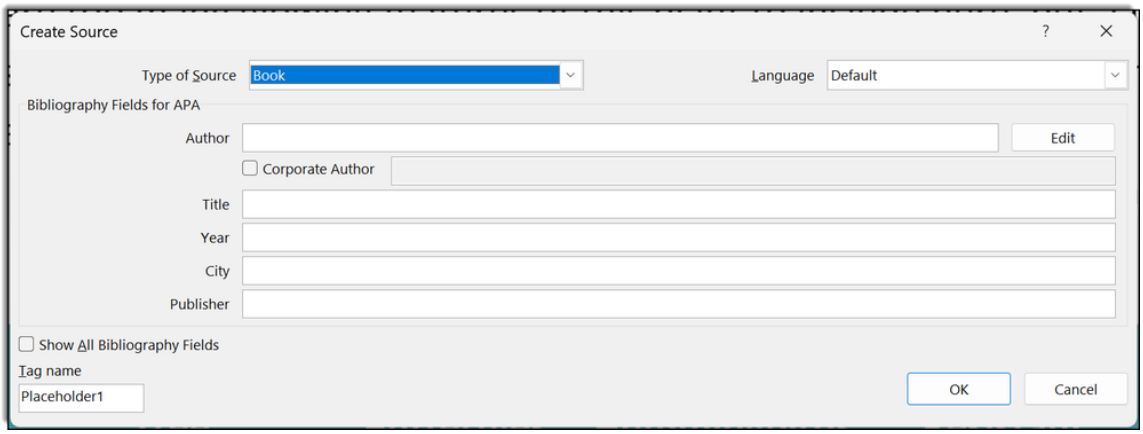
Inserting Citations

To insert citations into a Microsoft Word document:

1. On the **References** tab in the **Citations & Bibliography** group, click **Insert Citation** and select **Add New Source**:



2. Enter the information about the source into the **Create Source** dialog box:

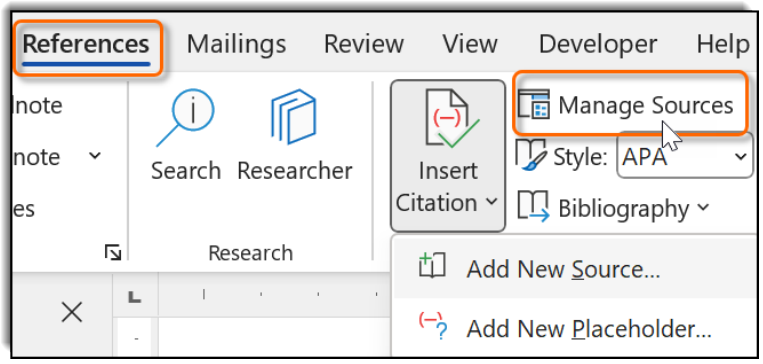


Managing Sources

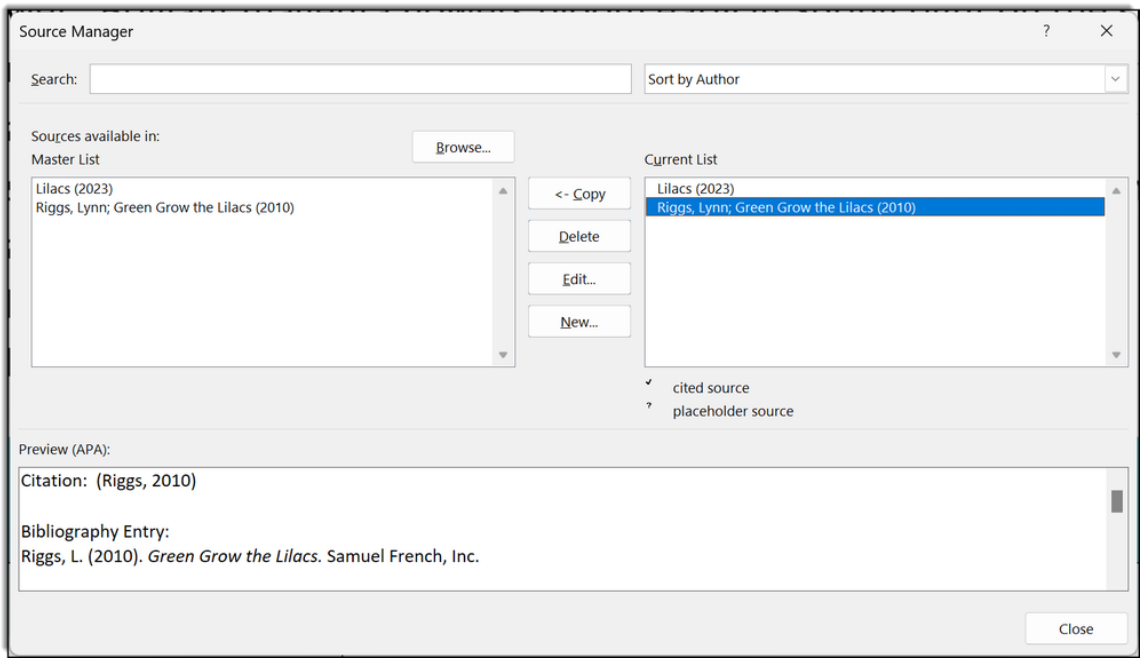
To manage sources within a Microsoft Word document:

EVALUATION COPY: Not to be used in class.

1. On the **References** tab in the **Citations & Bibliography** group, click **Manage Sources**:



2. In the **Source Manager** dialog box, you can copy sources into the current list (so they show up in the bibliography of the current document), delete sources, edit sources and add new sources:

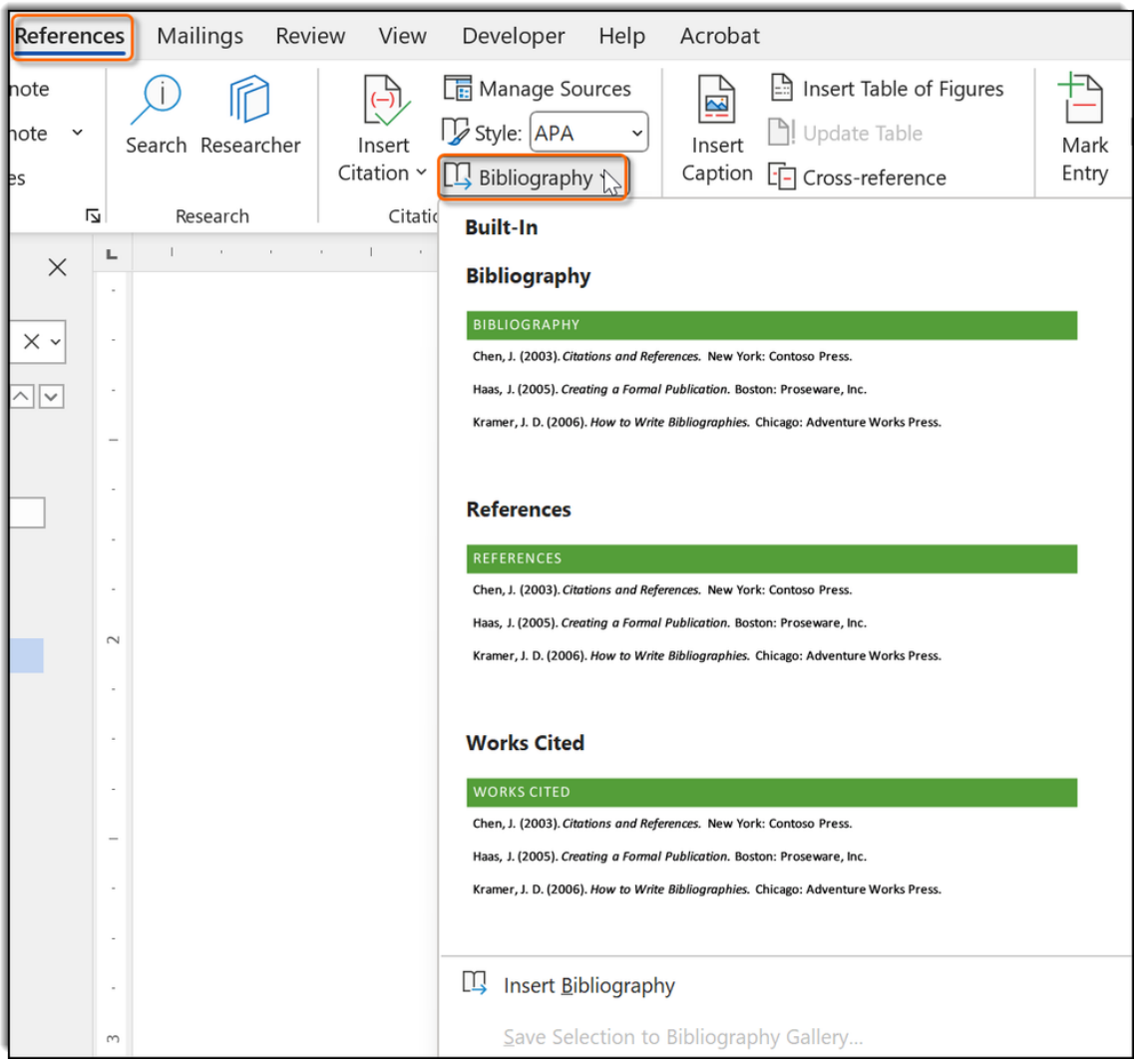


Inserting a Bibliography

To insert a bibliography into a Microsoft Word document:

1. Place your cursor in the document where you would like the bibliography to appear.
2. On the **References** tab in the **Citations & Bibliography** group, click **Bibliography** and select the bibliography of your choice:

EVALUATION COPY: Not to be used in class.

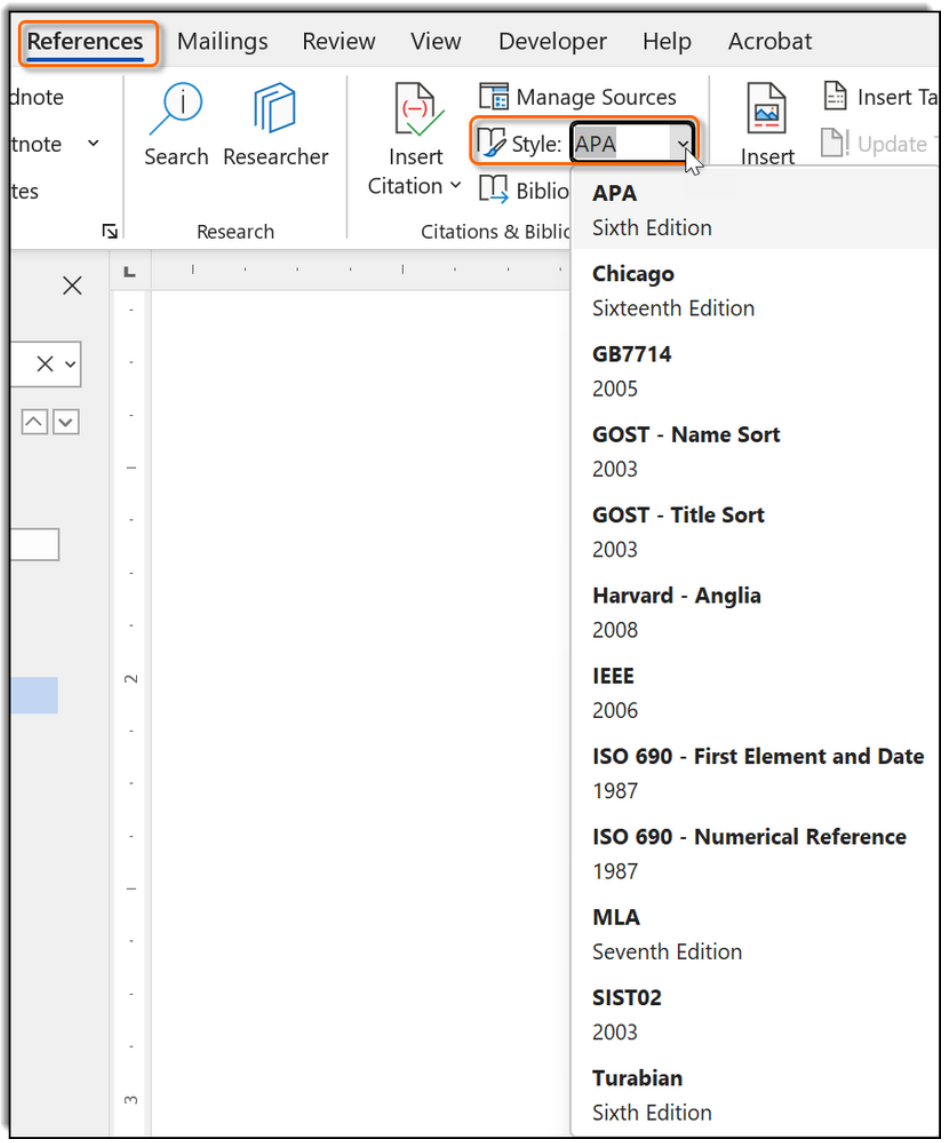


Selecting a Bibliography Style

To select or change the bibliography style within a Microsoft Word document:

1. On the **References** tab in the **Citations & Bibliography** group, click the drop-down arrow next to **Style** and select the bibliography style of your choice:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

Exercise 3: Insert Citations and a Bibliography

10 to 20 minutes

In this exercise, you will add citations to a document and then add a bibliography to the same document.

1. If it's not still open, open `PlantsInMyYard.docx` from the `word365-long-docs/Exercises` folder.
2. Add the following citations to your document:
    A. **Japanese Maple**: at the end of the *Description*, add a citation with the following data:
        - **Type of Source**: Website
        - **Name of Web Page**: Wikipedia - Acer Palmatum
        - **Name of Website**: Wikipedia
        - **Year**: 2023
        - **Month**: March
        - **Day**: 25
        - **URL**: https://en.wikipedia.org/wiki/Acer_palmatum
        - **Tag name**: Ace11

    B. **Jack-in-the-pulpit**: at the end of the *Special Features* section, add a citation with the following data:
        - **Type of Source**: Book
        - **Author**: Dunn, Dave
        - **Title**: All About Plants
        - **Year**: 2023
        - **City**: Syracuse, NY
        - **Publisher**: Ridiculous Publishing, Inc.
        - **Tag name**: Dun23

3. Insert a bibliography.

Evaluation Copy

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

1.7. Adding an Index

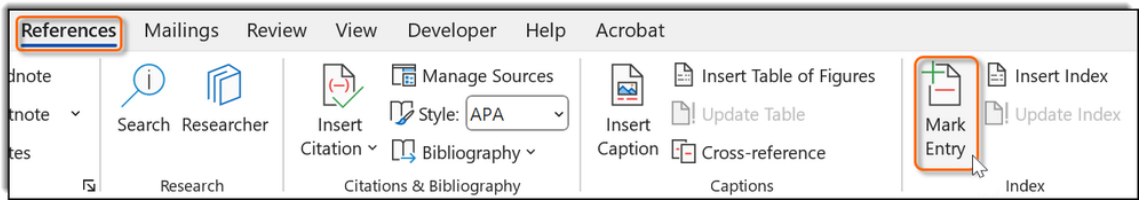
Adding an index to a long document makes it easy for readers to quickly locate information in the document. To create an index, first mark the entries you would like to have appear in the index and then insert the index. You can add additional entries later and update the index.

Marking Entries

Evaluation Copy

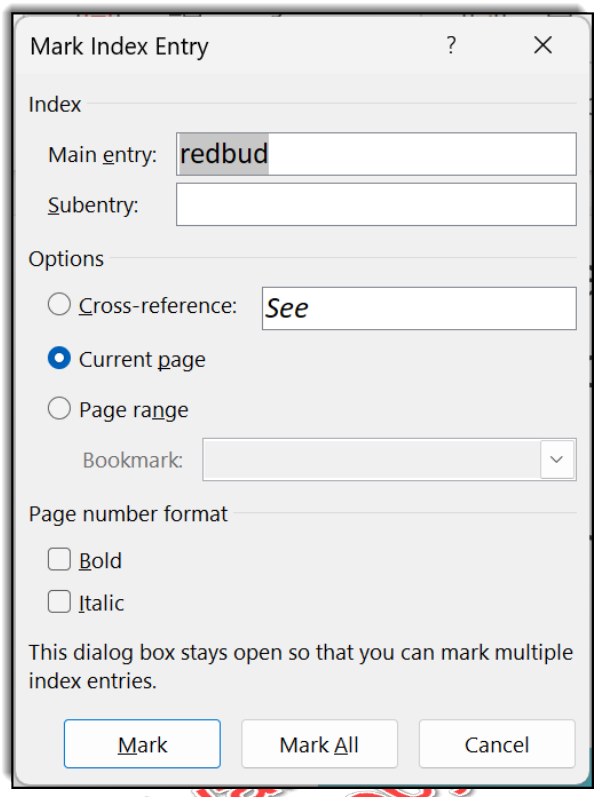
To mark entries in a Microsoft Word document:

1. Select the text you wish to mark.
2. On the **References** tab in the **Index** group, click **Mark Entry**:



3. In the **Mark Index Entry** dialog box, the selected text will appear as the **Main Entry**:

EVALUATION COPY: Not to be used in class.



4. Click **Mark** to mark only this instance of the entry for inclusion in the index. Click **Mark All** to select all instances of the entry for inclusion in the index.
5. Click **Close** when you are done.

Tip

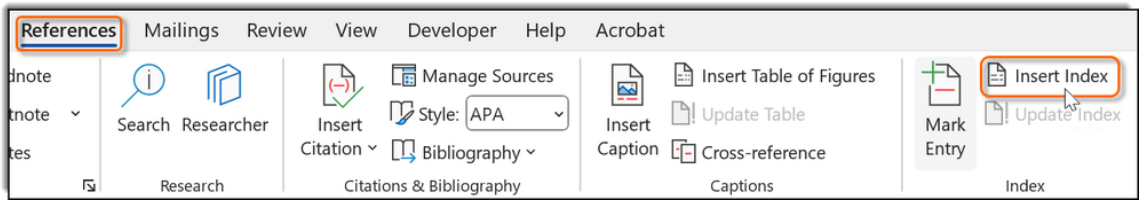
When marking multiple entries, you can keep the **Mark Index Entry** dialog box open and search your document in the background for the te next entry you want to mark.

Inserting an Index

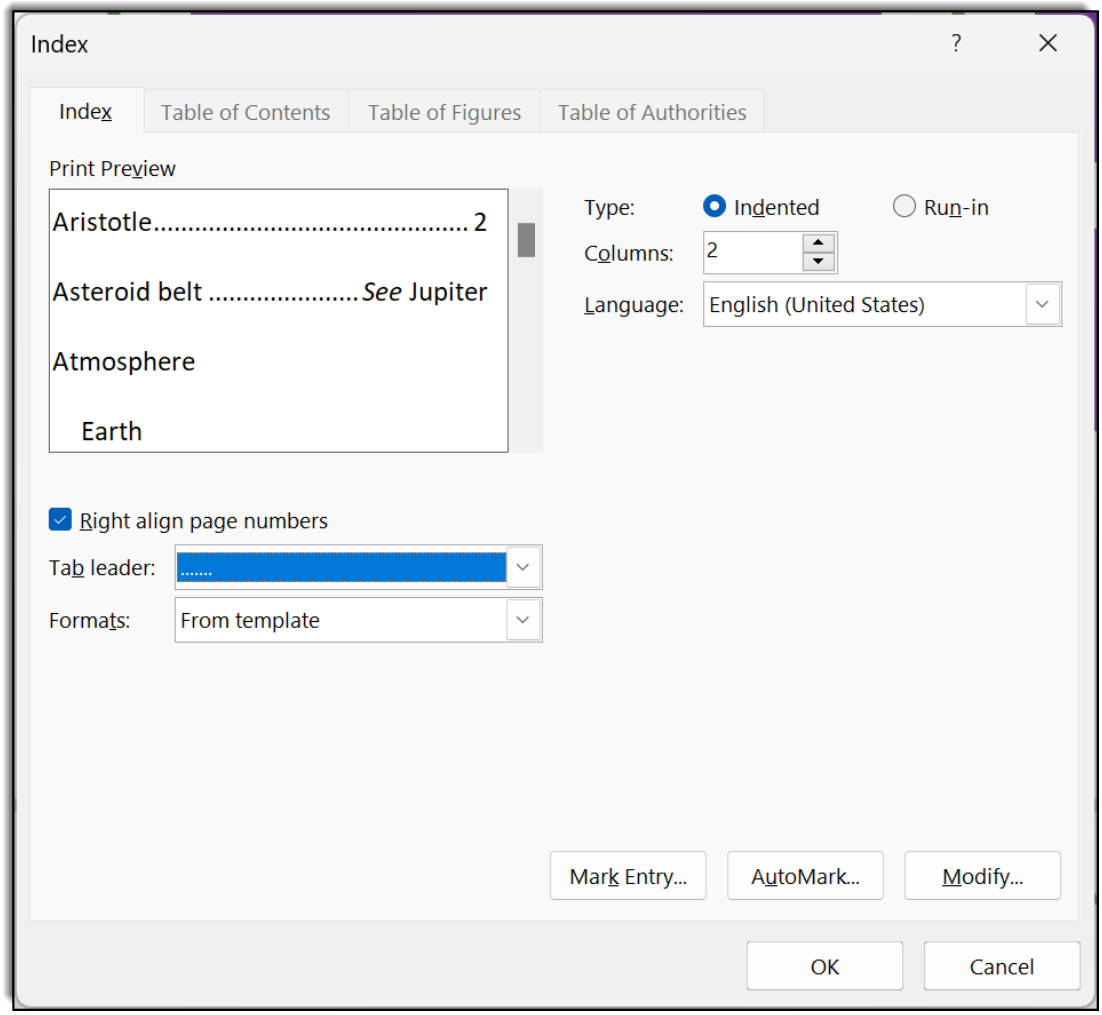
To insert an index into a Microsoft Word document:

1. Place your cursor in the document where you would like the index to appear (usually at or near the end of the document).
2. On the **References** tab in the **Index** group, click **Insert Index**:

EVALUATION COPY: Not to be used in class.

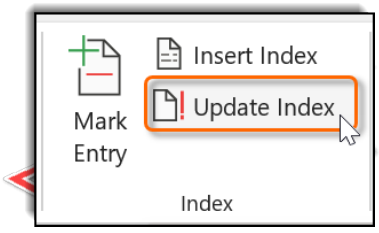


3. In the **Index** dialog box, choose the options you prefer and click **OK**:



If you need to update your index (e.g., after marking additional entries), click anywhere in the index and then click **Update Index** in the **Index** group on the **References** tab:

EVALUATION COPY: Not to be used in class.



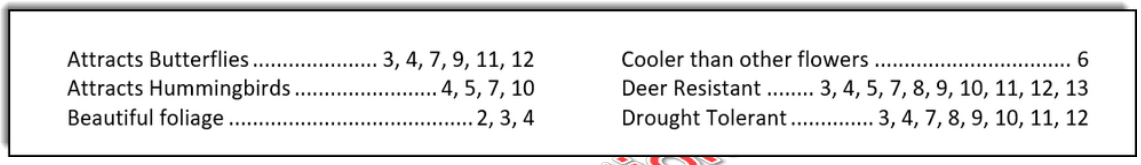
EVALUATION COPY: Not to be used in class.

Exercise 4: Inserting an Index

10 to 20 minutes

In this exercise, you will add an index to a document.

1. If it's not still open, open `PlantsInMyYard.docx` from the `word365-long-docs/Exercises` folder.
2. Insert a page break at the end of the document.
3. On the new page at the end, add an index that looks like the one below:



Hint

You will need to mark the entries before you can add the index.

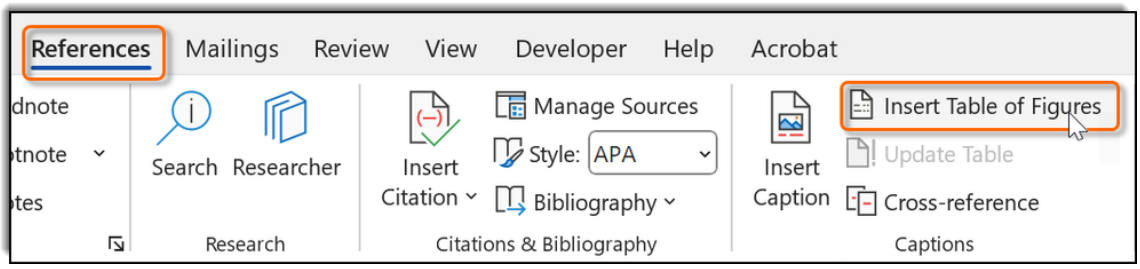
EVALUATION COPY: Not to be used in class.

1.8. Inserting a Table of Figures

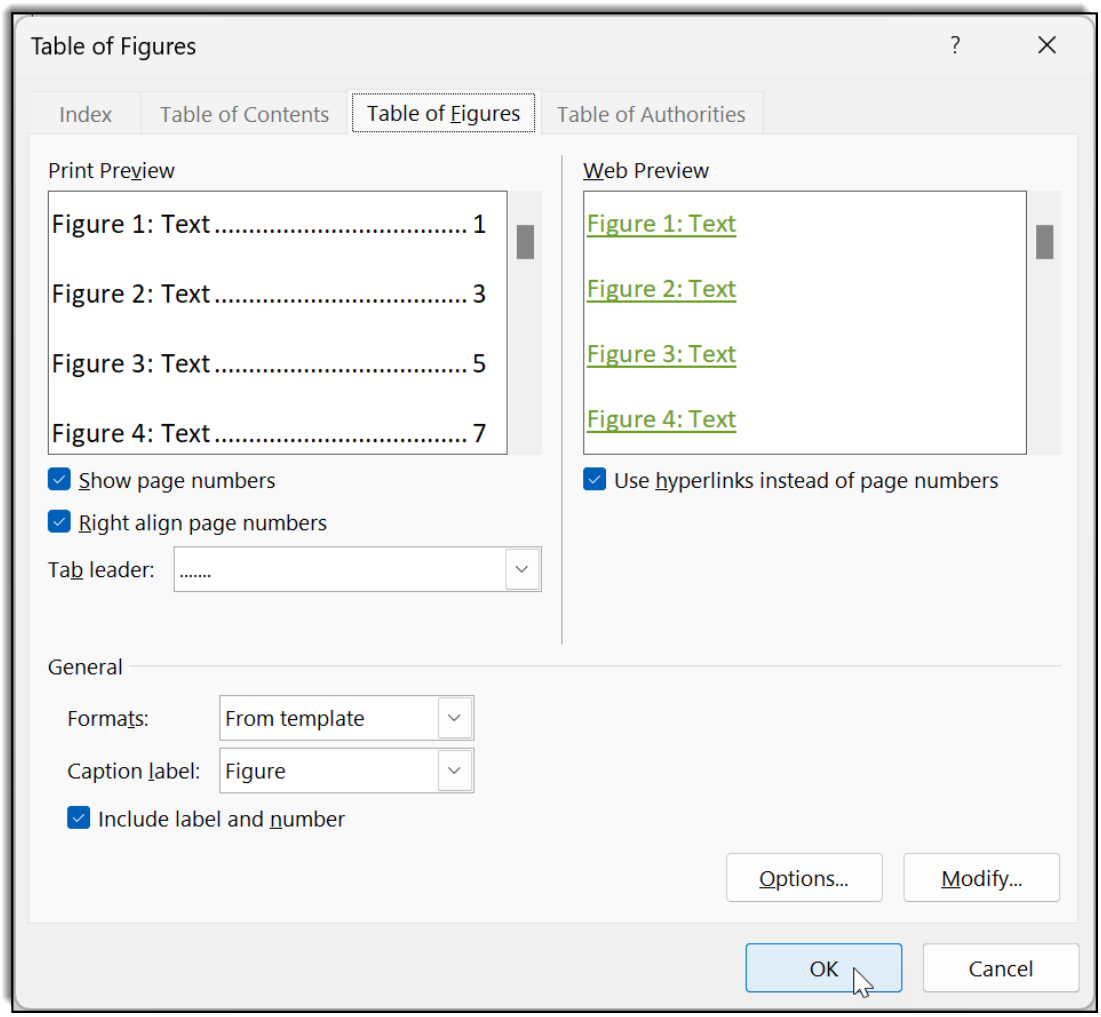
To insert a table of figures in a document:

1. On the **References** tab in the **Captions** group, select **Insert Table of Figures**:

EVALUATION COPY: Not to be used in class.



2. Select table of figure options and click **OK** to insert it:



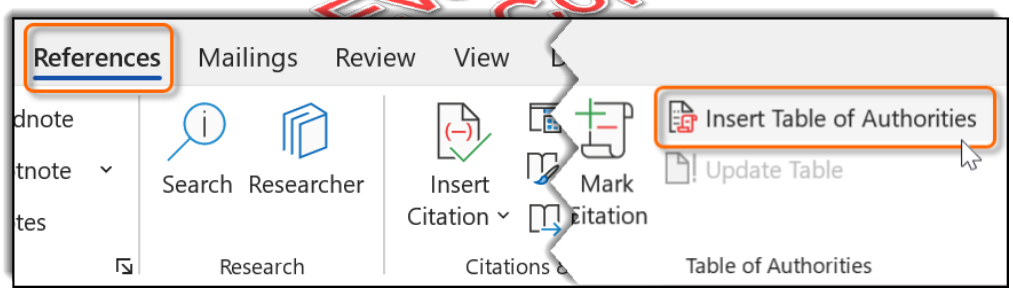
EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

1.9. Inserting and Updating a Table of Authorities

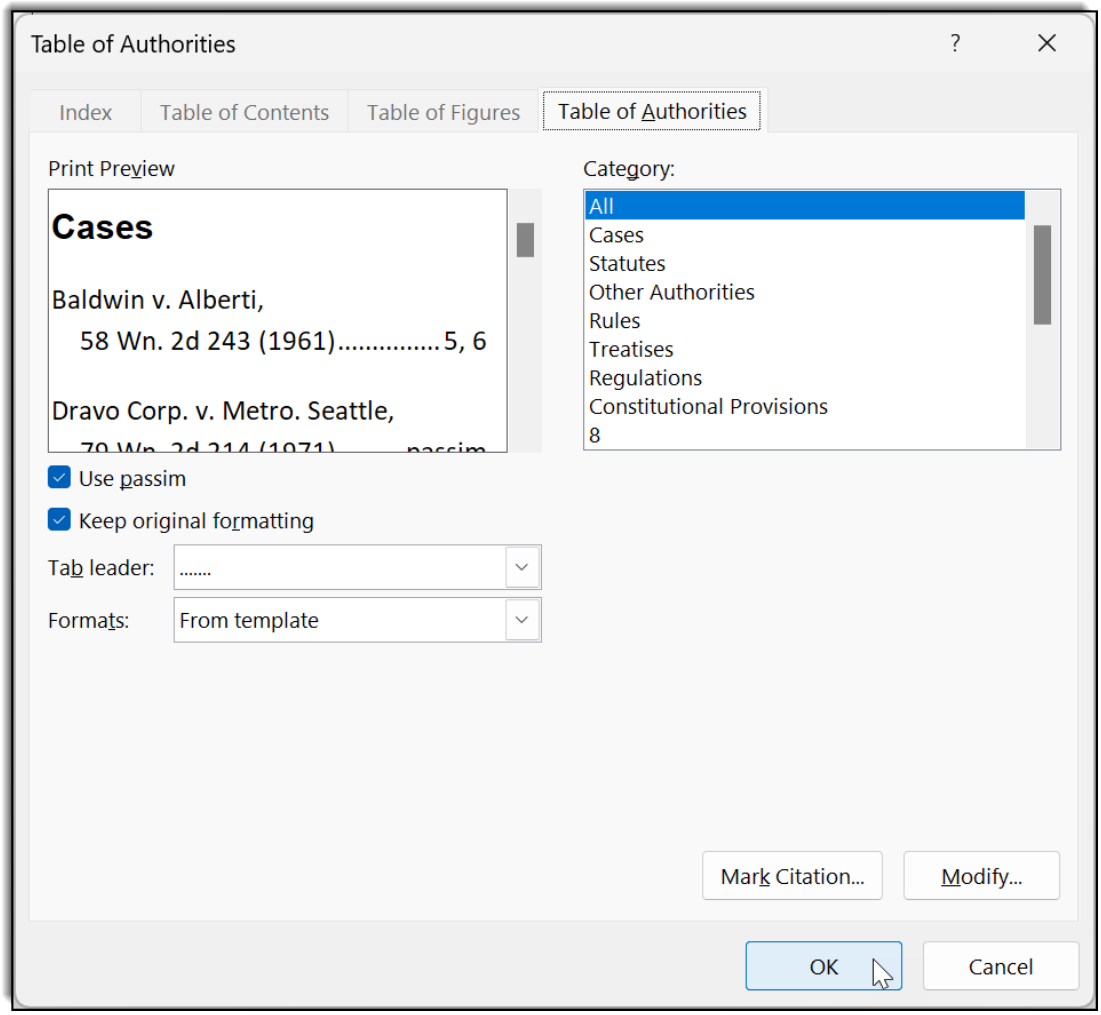
To insert and update a table of authorities that you have cited in your document:

1. On the **References** tab in the **Table of Authorities** group, select **Insert Table of Authorities**:



2. Set table options and click **OK** to insert it:

EVALUATION COPY: Not to be used in class.



3. To update the table of authorities, from the **Table of Authorities** group on the **References** tab, click **Update Table**.

EVALUATION COPY: Not to be used in class.

1.10. Using Bookmarks

Bookmarking spots in your documents makes it easy to quickly find and get back to these spots. You can even create hyperlinks to take you directly to the point you have bookmarked. Use bookmarks to:

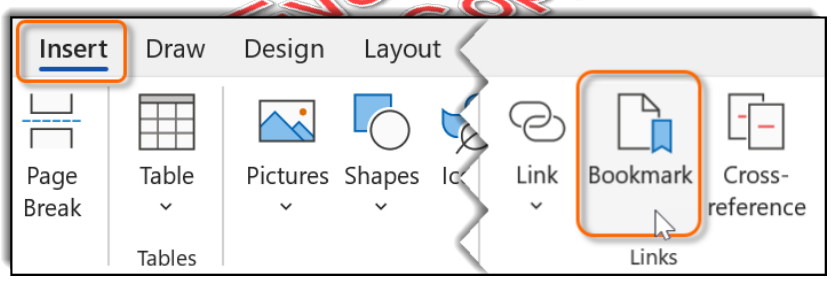
EVALUATION COPY: Not to be used in class.

1. Note sections of your document on which you wish to come back and work later.
2. Mark especially interesting sections of a document.
3. Mark sections to which you wish to link from elsewhere in your document.

Adding Bookmarks

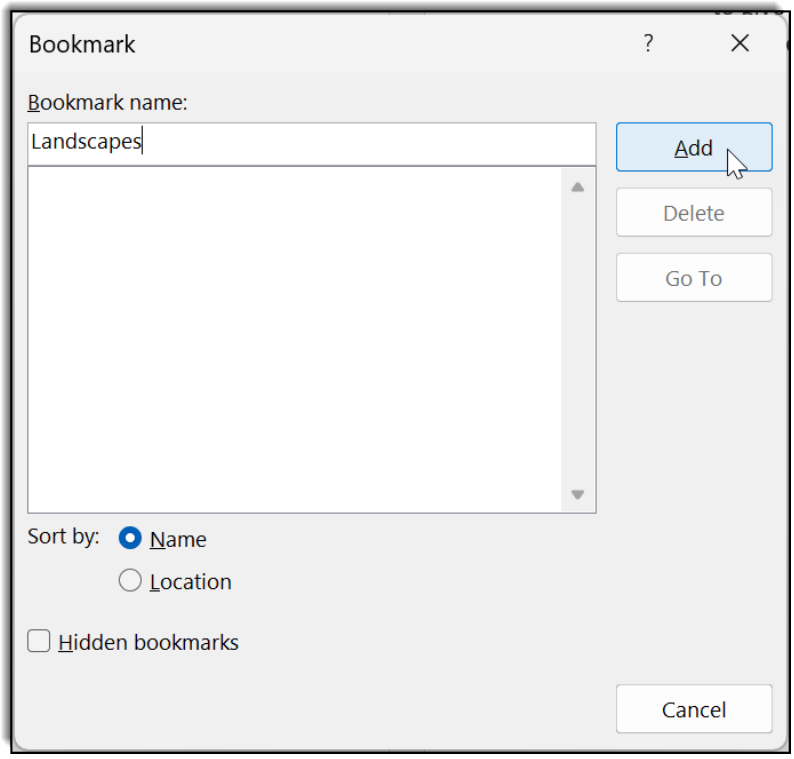
To add bookmarks to a document:

1. Select the location you wish to bookmark (can be selected text or just a place in the document).
2. On the **Insert** tab in the **Links** group, click **Bookmark**:



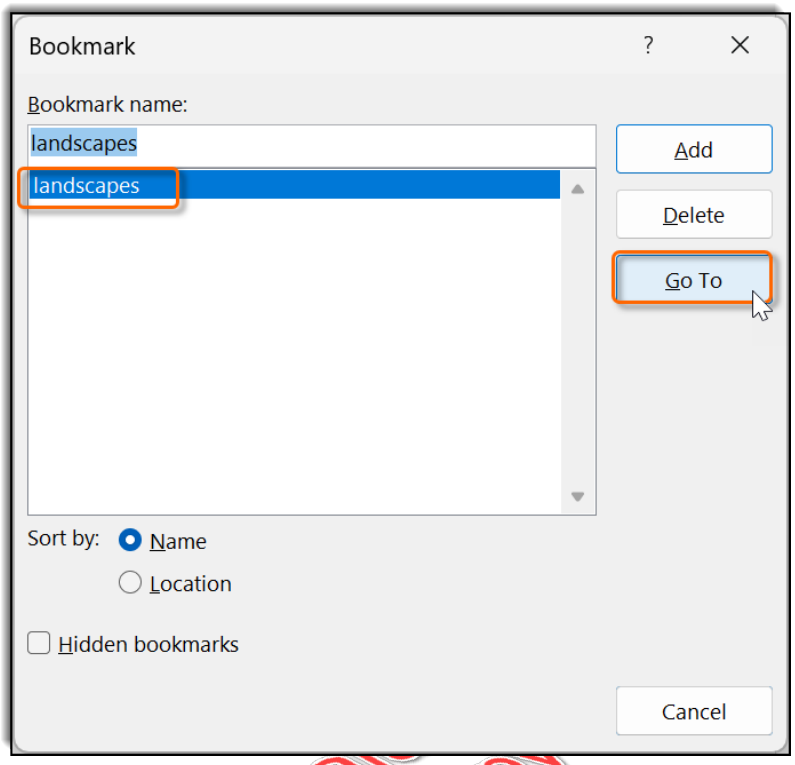
3. The **Bookmark** dialog will openName the bookmark (note: spaces are not allowed in bookmark names) and click **Add**:

EVALUATION COPY: Not to be used in class.



4. The new bookmark will be added, and the next time you open the **Bookmark** dialog, you will be able to select it and click **Go To** to navigate to it:

EVALUATION COPY: Not to be used in class.

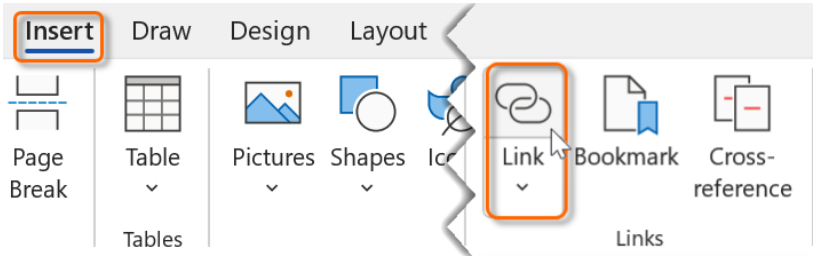


Evaluation Copy

Add a Hyperlink to a Bookmark

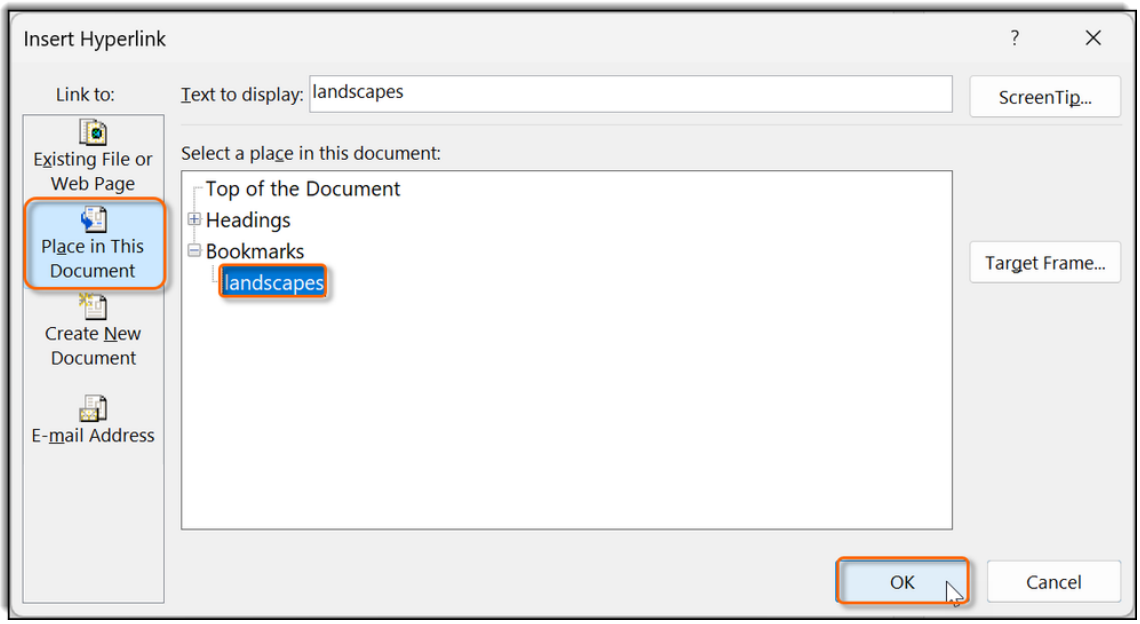
To add a hyperlink to a bookmark:

1. Select the text which will link to the bookmark.
2. On the **Insert** tab in the **Links** group, click **Link** (in earlier Word versions, this option is called **Hyperlink**):



3. Under **Link to**, select **Place in This Document** and then select the bookmark to which you wish to link and click **OK**:

EVALUATION COPY: Not to be used in class.



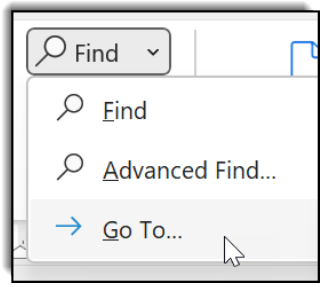
EVALUATION COPY: Not to be used in class.

1.11. Go To Feature

You can use Word's **Go To** feature to locate certain elements in your document.

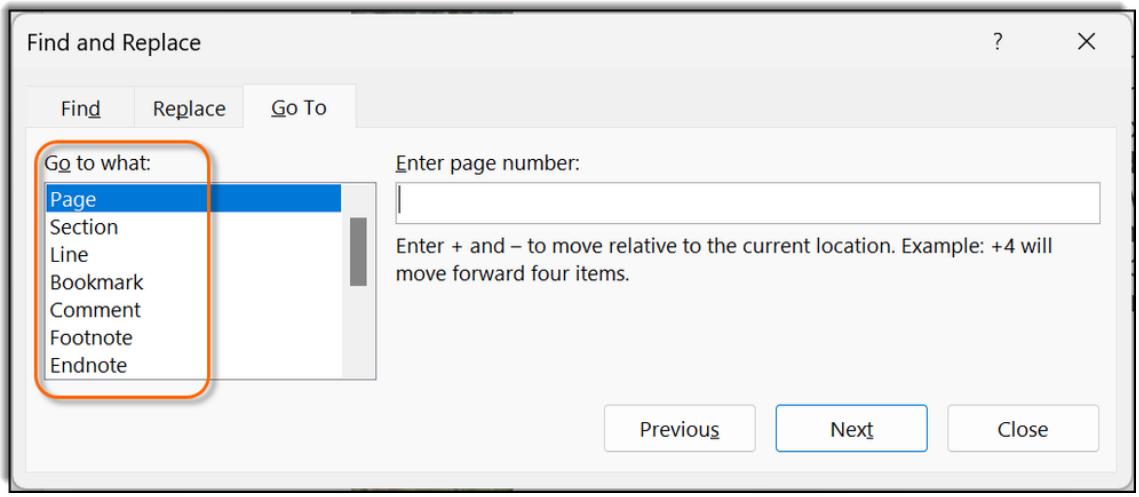
To use **Go To**:

1. From the **Home** tab, in the **Editing** group, select **Find** and then select **Go To**:

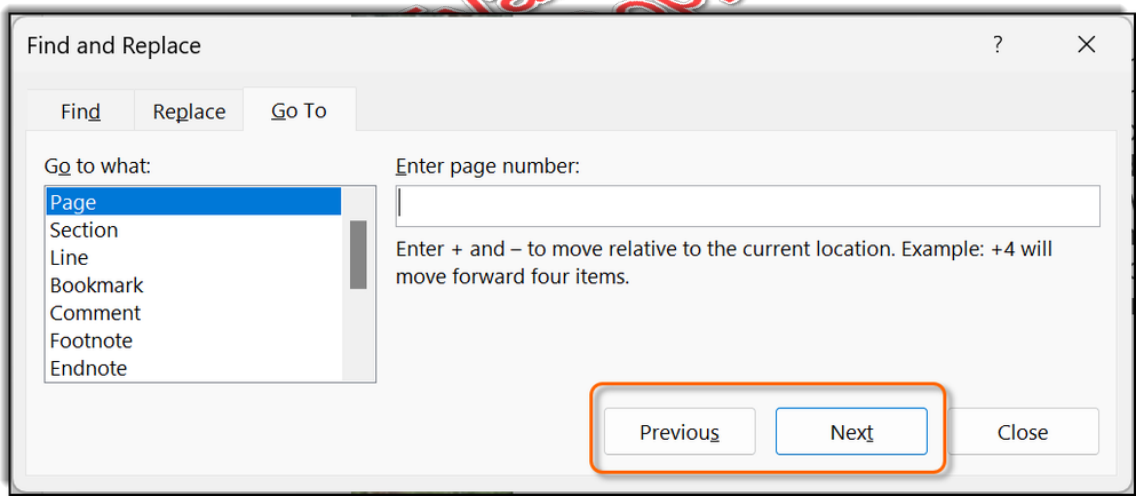


2. On the **Go To** tab of the **Find and Replace** dialog, use the options under **Go to what** to locate certain elements:

EVALUATION COPY: Not to be used in class.

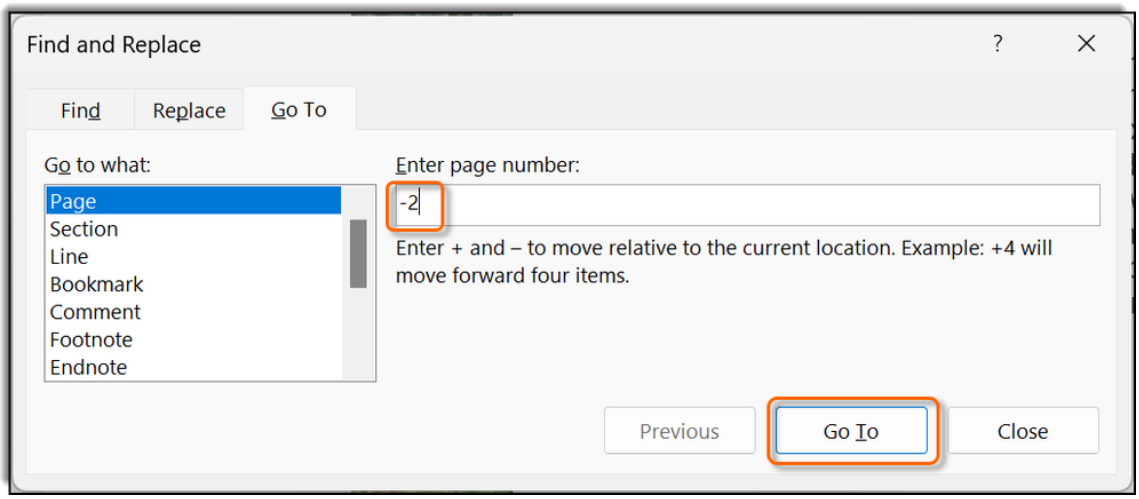


3. In the text box, enter a number to go to a specific element (e.g., page, section, etc.). Or use the **Previous** and **Next** buttons to navigate.



You can also enter plus (+) or minus (-) and a number to move element relative to the current position in the document:

EVALUATION COPY: Not to be used in class.



Conclusion

In this lesson, you learned to add and update a table of contents and to add footnotes and add endnotes. You also learned to insert citations, to create and update a bibliography, and to mark entries and insert an index into a document.

EVALUATION COPY: Not to be used in class.

LESSON 2

Reviewing and Collaborating on Documents

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Comments.

☑ Tracking changes.

☑ Viewing changes, additions, and comments.

☑ The **Reviewing** pane.

☑ Showing changes.

☑ Accepting and rejecting changes.

Evaluation Copy

Introduction

In this lesson, you will learn to add and work with comments, to track changes and set and change tracking options, to view changes, additions and comments, to use the **Reviewing** pane, to choose what changes to show, and to accept and reject changes.

EVALUATION COPY: Not to be used in class.

2.1. Adding Comments

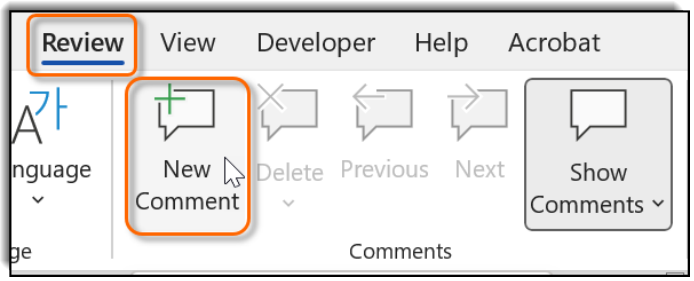
Comments are used to have threaded discussions with other people working on your document.

You can add comments to documents and manage them in Word using the **Comments** group on the **Review** tab of the Ribbon.

EVALUATION COPY: Not to be used in class.

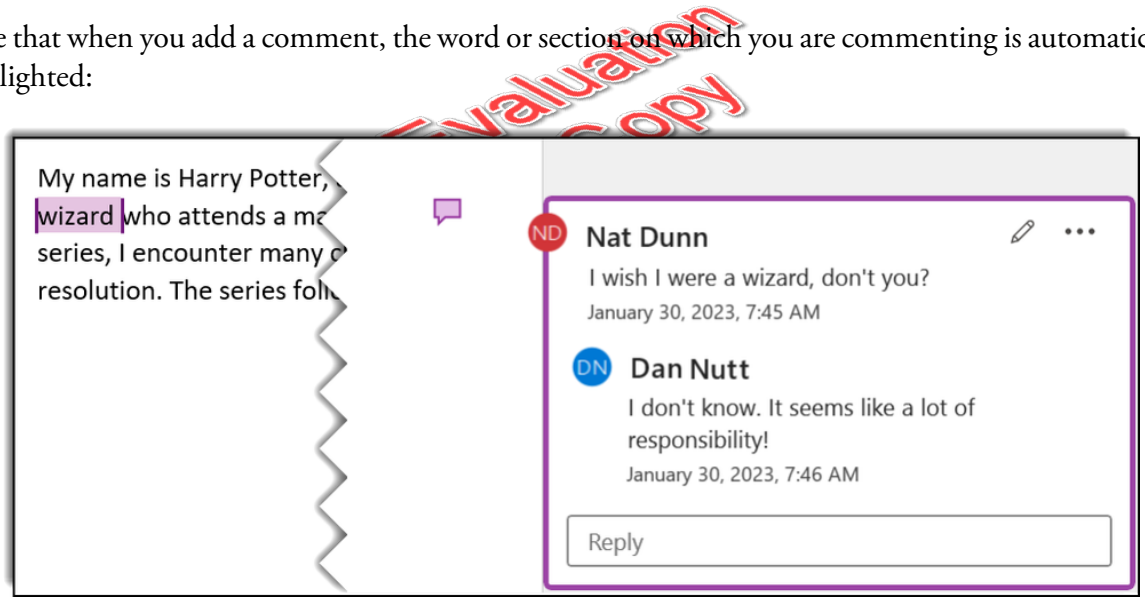
To add comments to a Microsoft Word document:

1. Place your cursor in or next to the word where you would like your comment to show up. To comment on a section of text, select the text.
2. On the **Review** tab in the **Comments** group, click **New Comment**:



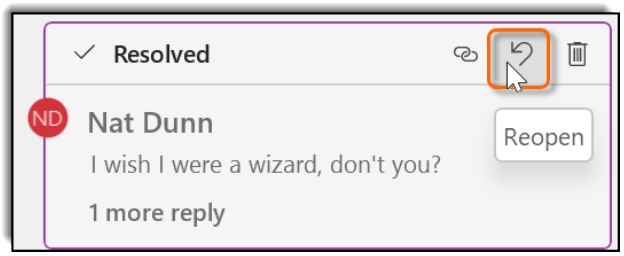
3. Enter your comment. People you are collaborating with will be able to reply to the comment.

Note that when you add a comment, the word or section on which you are commenting is automatically highlighted:



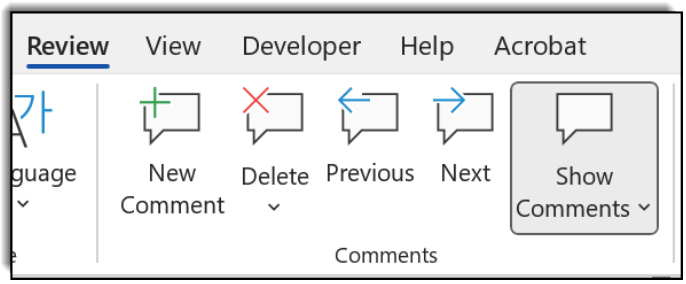
Notice how the replies show up in a thread. In the upper right of the comment box, you have a pencil icon for editing the comment (if its your comment), and an ellipsis button (three dots) that opens up other options, including one for deleting the thread and another for resolving it. A resolved thread can no longer be replied to, but can be reopened:

EVALUATION COPY: Not to be used in class.

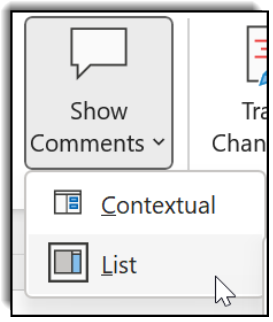


Comments Pane

You can delete and navigate through comments using the commands in the **Comments** group:

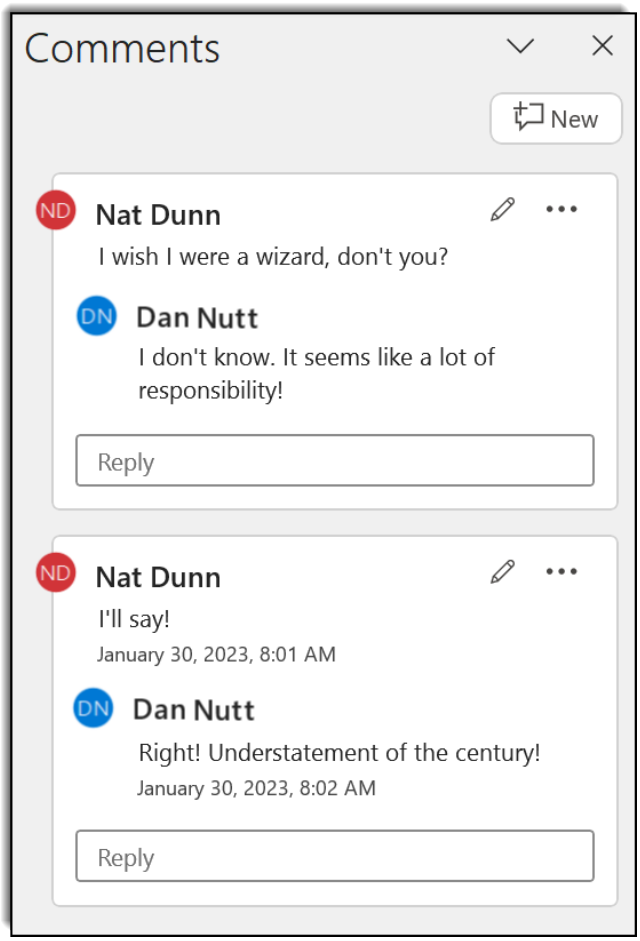


But it's generally easier to use the **Comments** pane, which you open and close with the **Show Comments** command:



Selecting a comment in this pane will take you to the location in the document where the comment was made:

EVALUATION COPY: Not to be used in class.



Older Versions of Office

Threaded comments are new in Office 365. In older versions of Word, comments were just notes. They were not threaded discussions as they are in 365.

EVALUATION COPY: Not to be used in class.

Exercise 5: Adding Comments to a Document

5 to 15 minutes

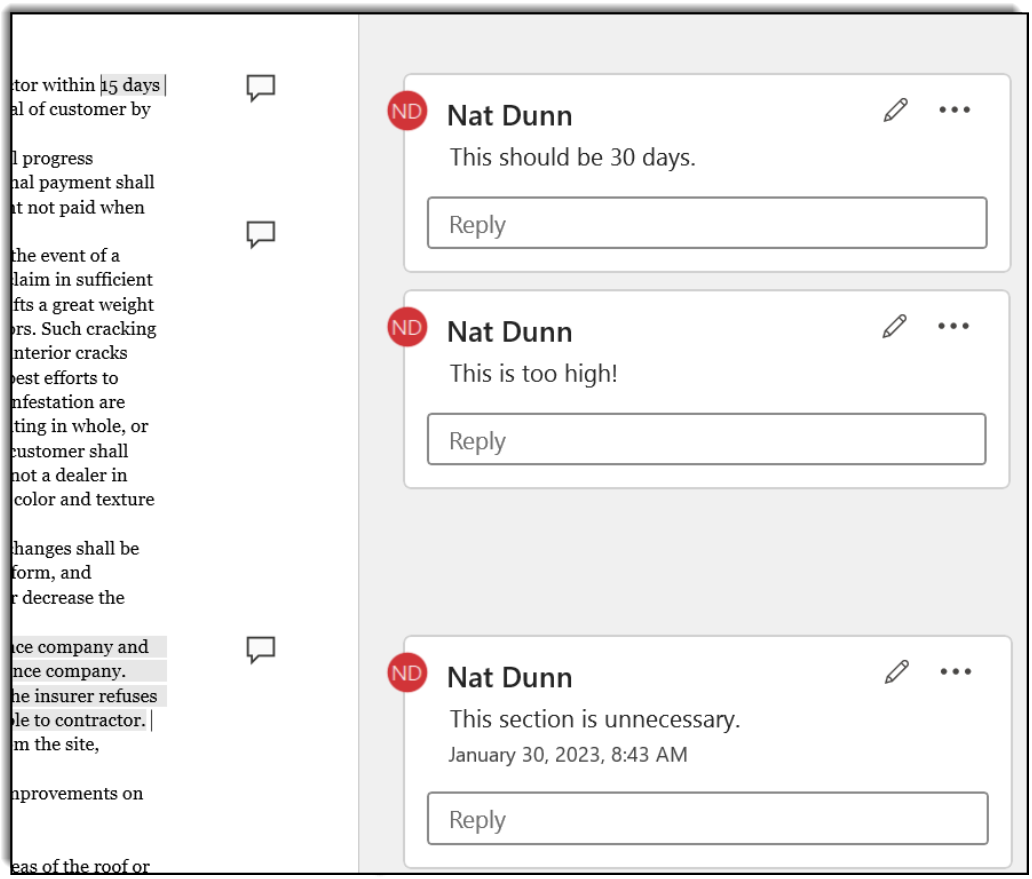
In this exercise, you will add comments to a document and will use the comments commands to select and delete a comment.

Evaluation Copy

1. Navigate to the `word365-reviewing-collaborating/Exercises` folder and open `GeneralTermsAndConditions.docx`.
2. Add the following comments to the document.
    A. Section 1 states that the contract must be signed and returned within 15 days. Add a comment stating that this should be 30 days.
    B. Section 2 states that interest on unpaid amounts shall accumulate at 18%. Add a comment stating that this is too high.
    C. Add a comment highlighting Section 5 and noting that it is unnecessary.

    Your comments should look something like this:

EVALUATION COPY: Not to be used in class.



3. Use the comments commands to move to the first comment and delete it.
4. Save the document.

EVALUATION COPY: Not to be used in class.

2.2. Tracking Changes

It is often useful for other people to be able to see exactly what you have changed in a document. When you select **Track Changes** in a Microsoft Word document, all changes are tracked, including:

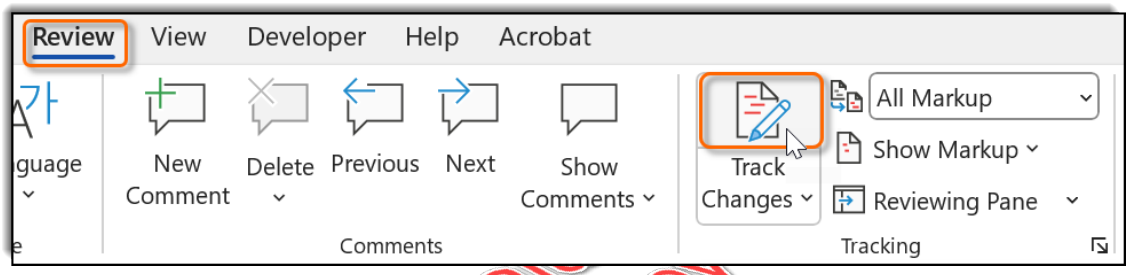
1. Insertions
2. Deletions

EVALUATION COPY: Not to be used in class.

3. Moved Text
4. Formatting Changes
5. Changes to Comments
6. Changes to Borders

To track changes in a Microsoft Word document:

1. On the **Review** tab in the **Tracking** group, click **Track Changes**:

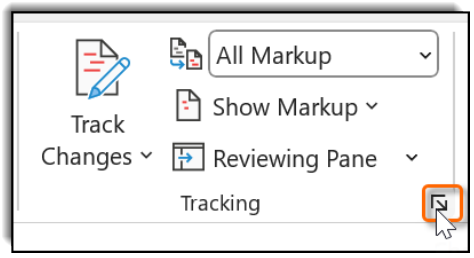


Evaluation Copy

2. To stop tracking changes, click **Track Changes** again.

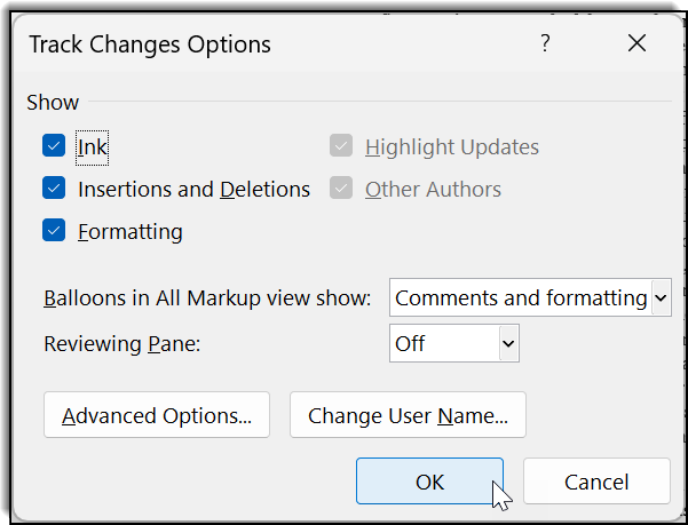
To change the way changes to your document are shown:

1. Click the **Tracking** group dialog box launcher:



2. Use the **Track Changes Options** dialog to choose how you would like various changes to appear:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

Exercise 6: Tracking Changes

5 to 10 minutes

In this exercise, you will track insertions, deletions, and formatting changes.

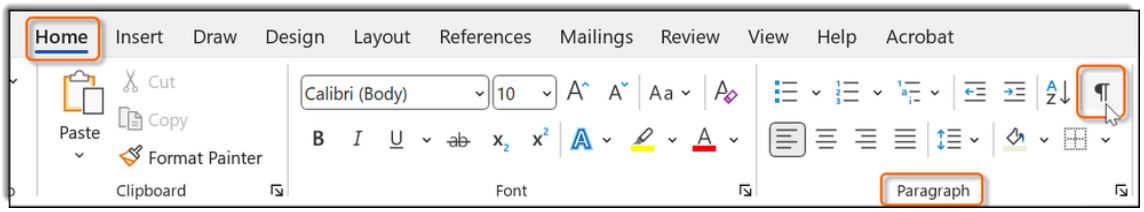
1. On the **Home** tab, in the **Paragraph** group, click the **Show/Hide Paragraph Mark** command.
2. If it's not still open, open `GeneralTermsAndConditions.docx` from the `word365-reviewing-collaborating/Exercises` folder.
3. Turn on Track Changes and make the following changes:
   A. In Section 13 (Assignment) add the following text at the end of the sentence: "without the prior written consent of both parties."
   B. Delete Section 10 (Excess Materials).
   C. In the body of the document (not the header), delete all the tabs in front of "General Terms and Conditions" and then change its style from **Normal** to **Heading 1**.
4. Save your changes as we will be using this document in future exercises.

Evaluation Copy

EVALUATION COPY: Not to be used in class.

Solution

1. On the **Home** tab, in the **Paragraph** group, click the **Show/Hide Paragraph Mark** command:



2. On the **Review** tab in the **Tracking** group, click **Track Changes**
3. Place your cursor in Section 13 at the end of the sentence, before the period, and type "without the prior written consent of both parties".
4. Select all text in Section 10 and press **Delete**.
5. Place the cursor before "General Terms and Conditions" (at the top of the body of the document, not in the header) and backspace over all the tabs. Then, on the **Home** tab in the **Styles** group, click the **Heading 1** style.
6. Save your changes.

Evaluation Copy

EVALUATION COPY: Not to be used in class.

2.3. Viewing Changes

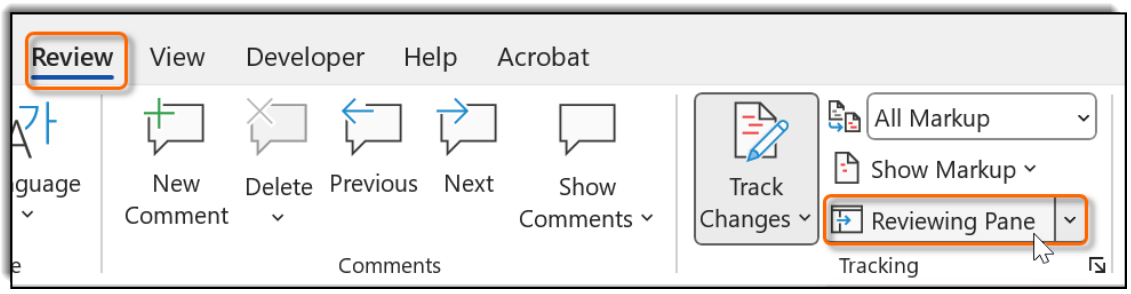
❖ 2.3.1. The Reviewing Pane

The **Reviewing** shows all insertions, deletions, formatting, and other changes, as well as all comments, in a separate window. You can move from one change to another in your document by selecting the change in the **Reviewing** pane.

To show or hide the **Reviewing** pane:

1. On **Review** tab in the **Tracking** group, click **Reviewing Pane**:

EVALUATION COPY: Not to be used in class.

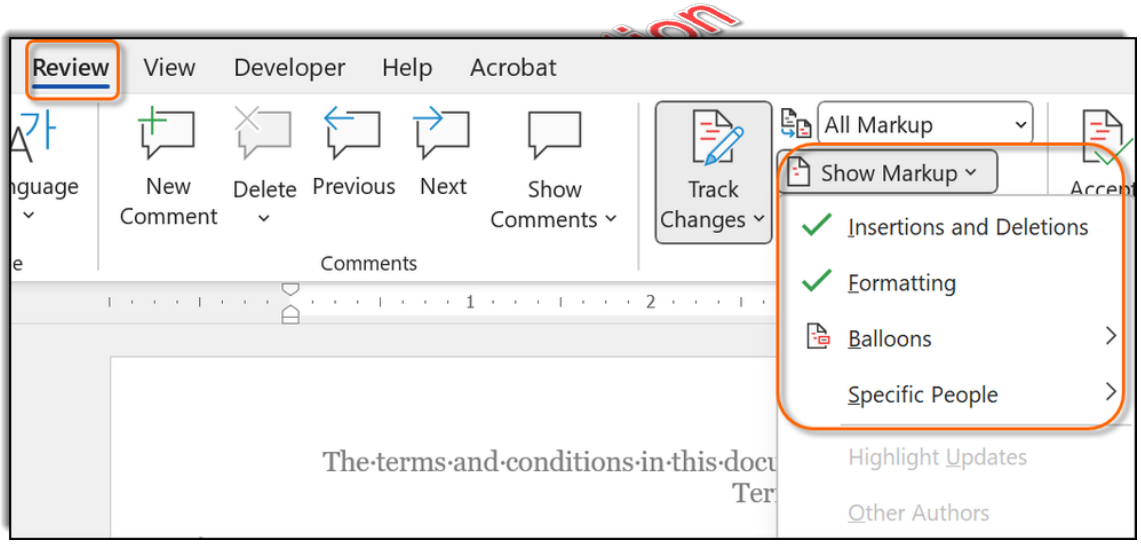


2. Click it again to toggle between showing and hiding it.

❖ 2.3.2. Choosing What Changes to Show

If a document is heavily marked up, it is often useful to focus exclusively on certain types of changes or markup. To choose what markup to show and how you want to see it:

1. On **Review** tab in the **Tracking** group, click **Show Markup** and select or deselect items by clicking them:



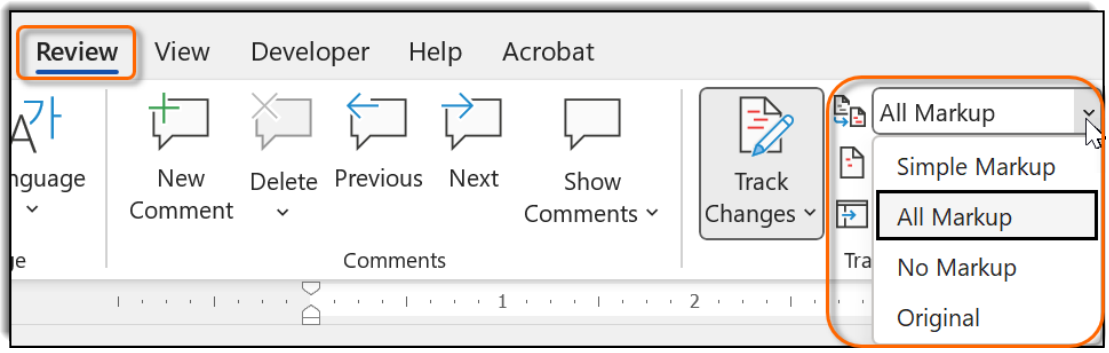
The **Show Markup** command also allows you to choose:

1. Where to see markup: inline or in balloons. Showing all revisions in balloons can give you a better look at the document will look if the revisions are accepted.
2. Whose changes to see. Select **All Reviewers** or only those reviewers whose markup you wish to review.

EVALUATION COPY: Not to be used in class.

❖ 2.3.3. Viewing Different Versions

You can easily switch back and forth between the original and final versions of a document, both with or without markup showing using this dropdown menu (called the **Display for Review** command) in the **Tracking** group on the **Review** tab:



1. **Simple Markup** – Cleaned up version of the document with changes indicated. To see the changes, click a red change indicator line on the left.
2. **All Markup** – The final document, with all proposed changes showing.
3. **No Markup** – The final document, without proposed changes showing.
4. **Original** – The original document, without proposed changes showing.

EVALUATION COPY: Not to be used in class.

Exercise 7: Viewing Markup

10 to 20 minutes

In this exercise, you will use the **Reviewing** pane to locate changes in a document, use the **Show Markup** command to show various changes, and use the **Display for Review** command to display the document before, after and with markup.

1. If it's not still open, open `GeneralTermsAndConditions.docx` from the `word365-reviewing-collaborating/Exercises` folder.
2. Show the **Revisions** pane. If it is already showing, hide it and then show it again.
3. Locate the place where text was inserted into the document by clicking it in the **Revisions** pane.
4. Use the **Show Markup** command to:
    A. Show only comments.
    B. Show only formatting changes.
    C. Show only insertions and deletions.
    D. Show revisions in balloons (if revisions are already showing in balloons, then switch to showing them inline).
5. Use the **Display for Review** command to:
    A. Display the original version of the document.
    B. Display the final version of the document with all markup showing.
        - **Hint**: markup which is not checked when clicking the **Show Markup** command will not show up in any of the **Display for Review** options.
    C. Display the final version of the document without markup showing.
6. Save your changes as we will be using this document in future exercises.

Evaluation Copy

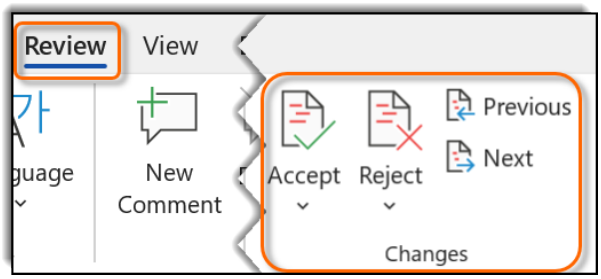
EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

2.4. Accepting and Rejecting Changes

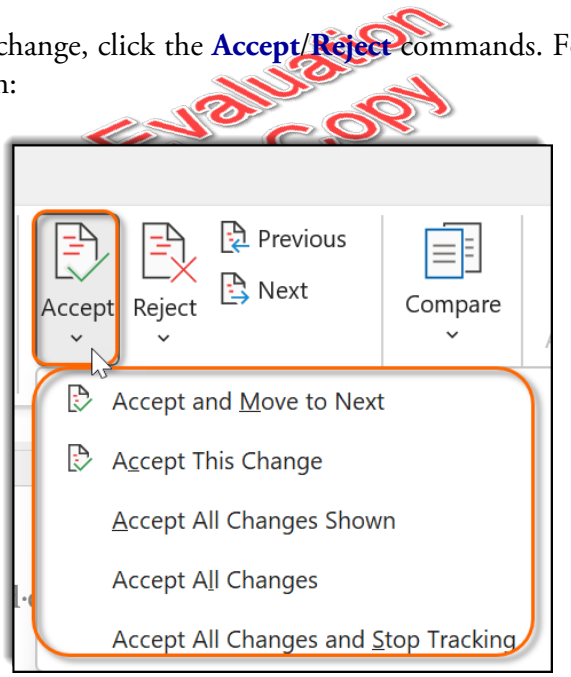
The ability to track changes in a document is very helpful when collaborating on documents. However, someone ultimately has to finalize the document, and in so doing they have to decide whether to accept or reject the changes that have been recommended and made.

You accept/reject changes on the **Review** tab in the **Changes** group:



Use the **Previous** and **Next** commands to navigate between changes without accepting or rejecting them.

To accept or reject a single change, click the **Accept**/**Reject** commands. For additional options click the down arrows below them:



Notice you have the following options:

1. **Accept and Move to Next** – Accept a change and jump to the next change in the document.
2. **Accept This Change** – Accept just one change.

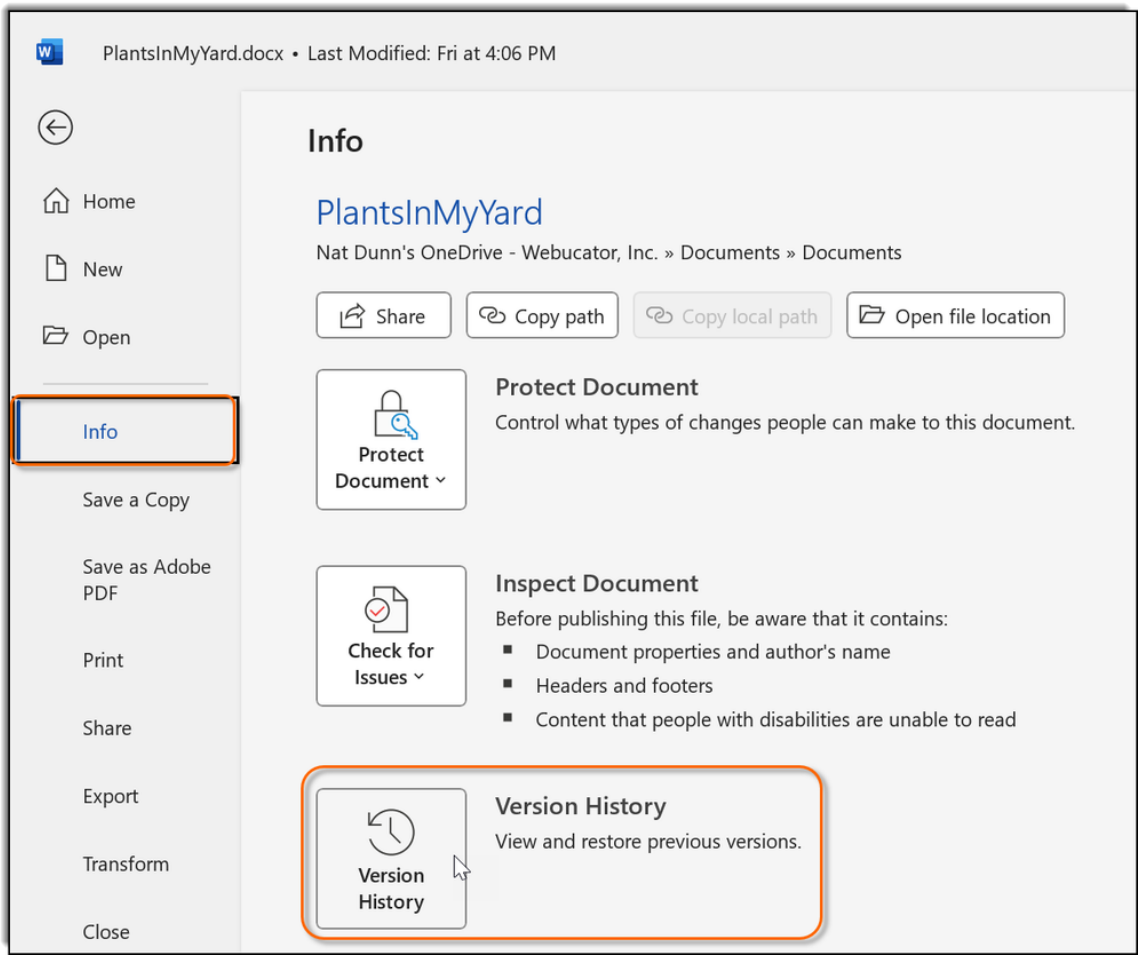
EVALUATION COPY: Not to be used in class.

3. **Accept All Changes Shown** – Accept changes in groups based on the type of change or based on the reviewer.
4. **Accept All Changes** – Accept all changes.
5. **Accept All Changes and Stop Tracking** – Accept all changes and stop tracking.

The options for rejecting changes are the same.

❖ 2.4.1. Version History

To view the changes that have been made to your document, you can select **Info > Version History** from the **File** menu (Backstage view), but only if the document is save in the cloud:



EVALUATION COPY: Not to be used in class.

Exercise 8: Accepting and Rejecting Changes

15 to 25 minutes

In this exercise, you will accept and reject changes by reviewer and type.

Evaluation Copy

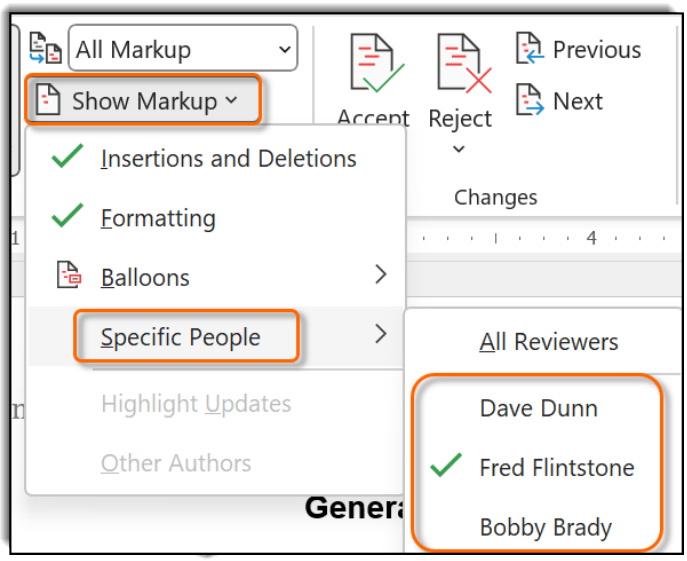
1. Navigate to the `word365-reviewing-collaborating/Exercises` folder and open `GeneralTermsAndConditions2.docx`.
2. Reject all changes made by Fred Flintstone.
3. Accept all formatting changes.
4. Accept all changes except the deletion of Section 10 (Excess Materials), which should be rejected.
5. Save the document.

EVALUATION COPY: Not to be used in class.

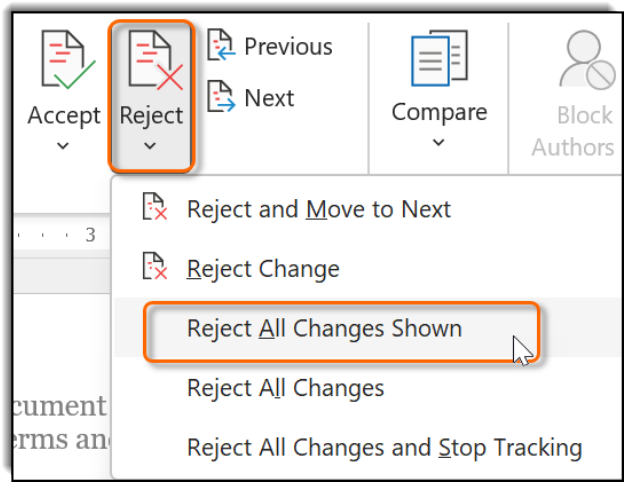
EVALUATION COPY: Not to be used in class.

Solution

1. Open the document.
2. To reject all changes made by Fred Flintstone:
   A. On the **Review** tab in the **Tracking** group, click **Show Markup** and deselect Dave Dunn and Bobby Brady by clicking their names (you will need to do one and then the other), so that only Fred Flintstone's changes will show:



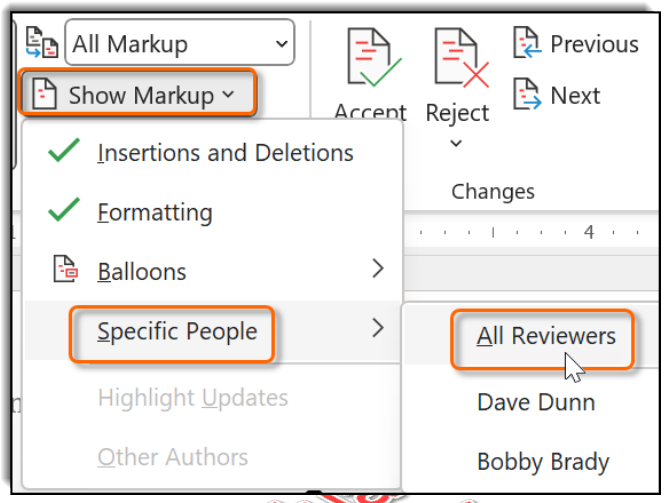
   B. In the **Changes** group, click the **Reject** drop-down and then **Reject All Changes Shown**:



3. To accept all formatting changes:

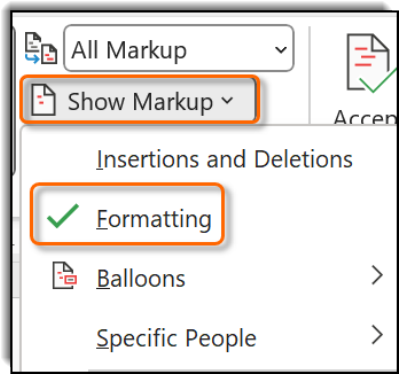
EVALUATION COPY: Not to be used in class.

A. On the **Review** tab in the **Tracking** group, click **Show Markup** and select **All Reviewers**:



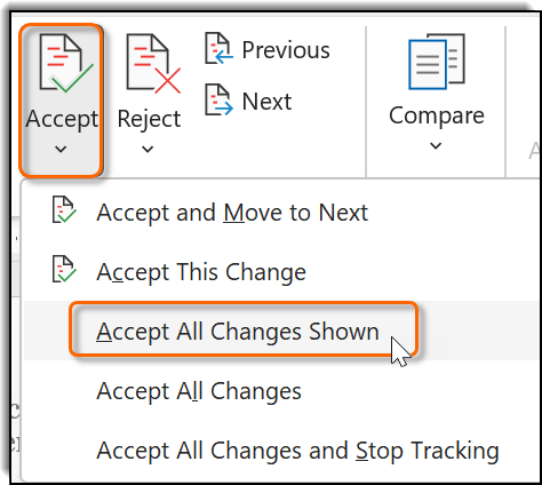
Evaluation Copy

B. On the **Review** tab in the **Tracking** group, click **Show Markup** and leave only **Formatting** selected:



C. In the **Changes** group, click the **Accept** drop-down and then **Accept All Changes Shown**:

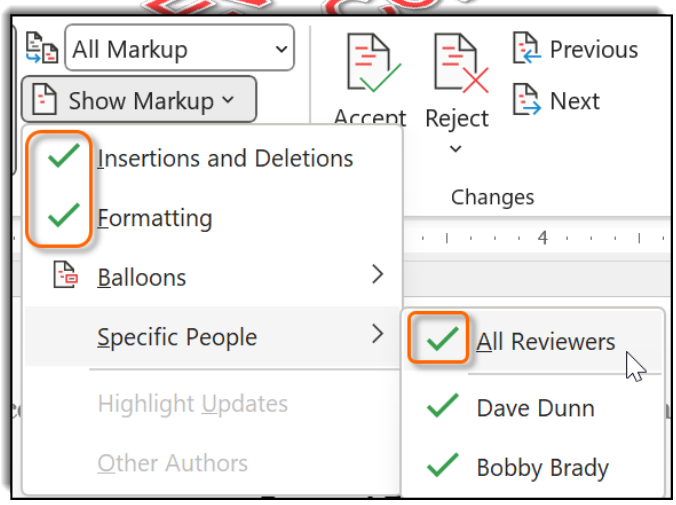
EVALUATION COPY: Not to be used in class.



4. To reject the change to Section 10 and accept all other changes:

   A. On the **Review** tab in the **Tracking** group, click **Show Markup** and show both **Insertions and Deletions** and **Formatting** and make sure **All Reviewers** is selected:

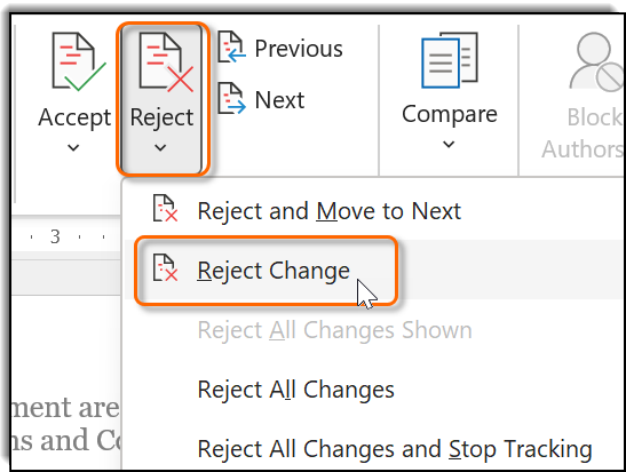
Evaluation Copy



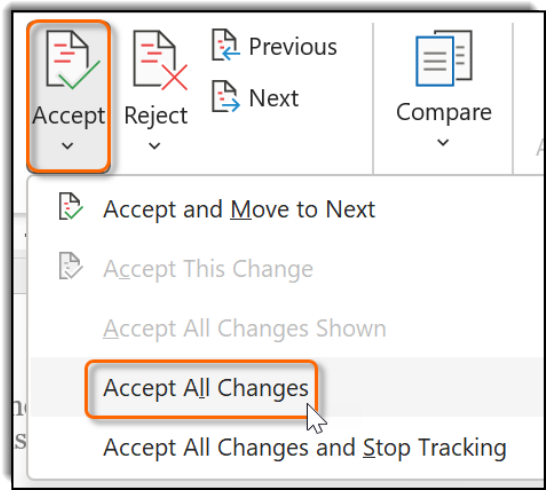
   B. Place your cursor in Section 10 (Excess Materials).

   C. In the **Changes** group, click the **Reject** drop-down and select **Reject Change**:

EVALUATION COPY: Not to be used in class.



D. In the **Changes** group, click the **Accept** drop-down and then **Accept All Changes**:



5. Save the document.

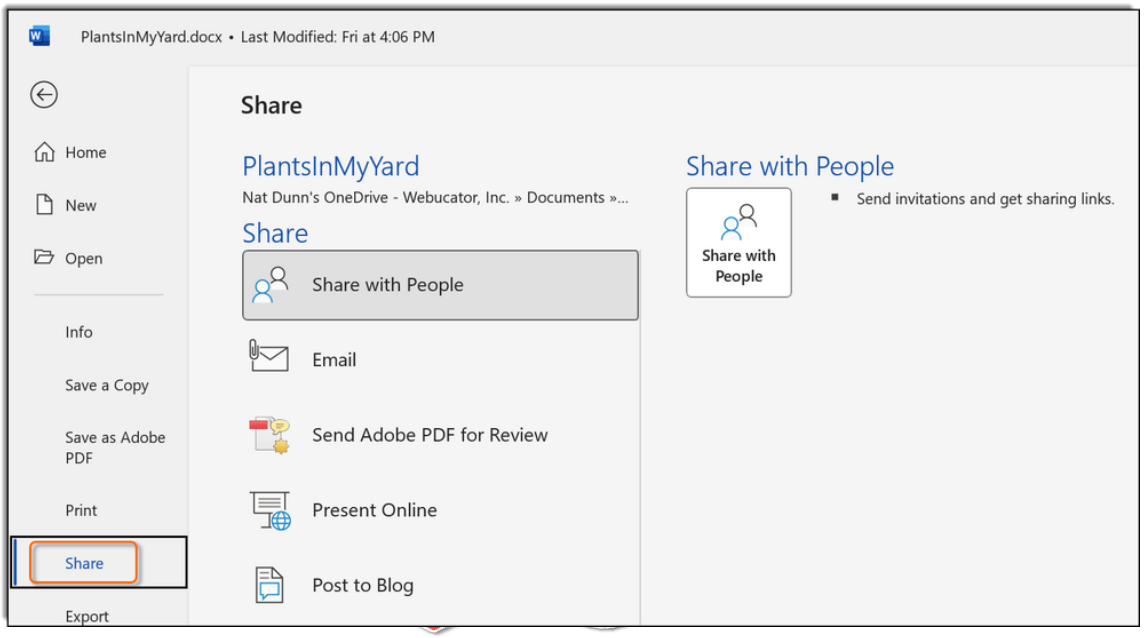
EVALUATION COPY: Not to be used in class.

2.5. Sharing

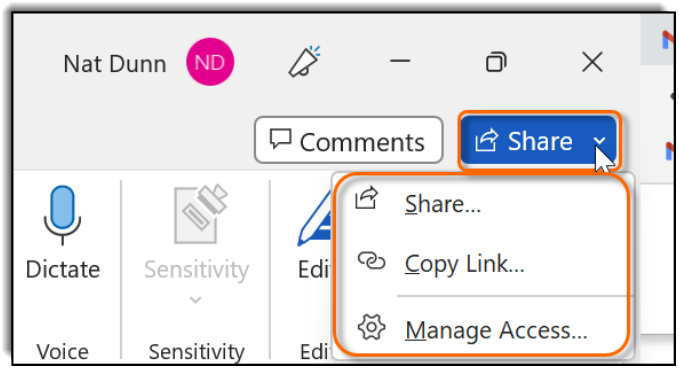
You can share your Word documents with others using the **Share** option on the **File** menu.

EVALUATION COPY: Not to be used in class.

First, you need to save the document to SharePoint or OneDrive. Then, select **File > Share** to see the many options you have for sharing:

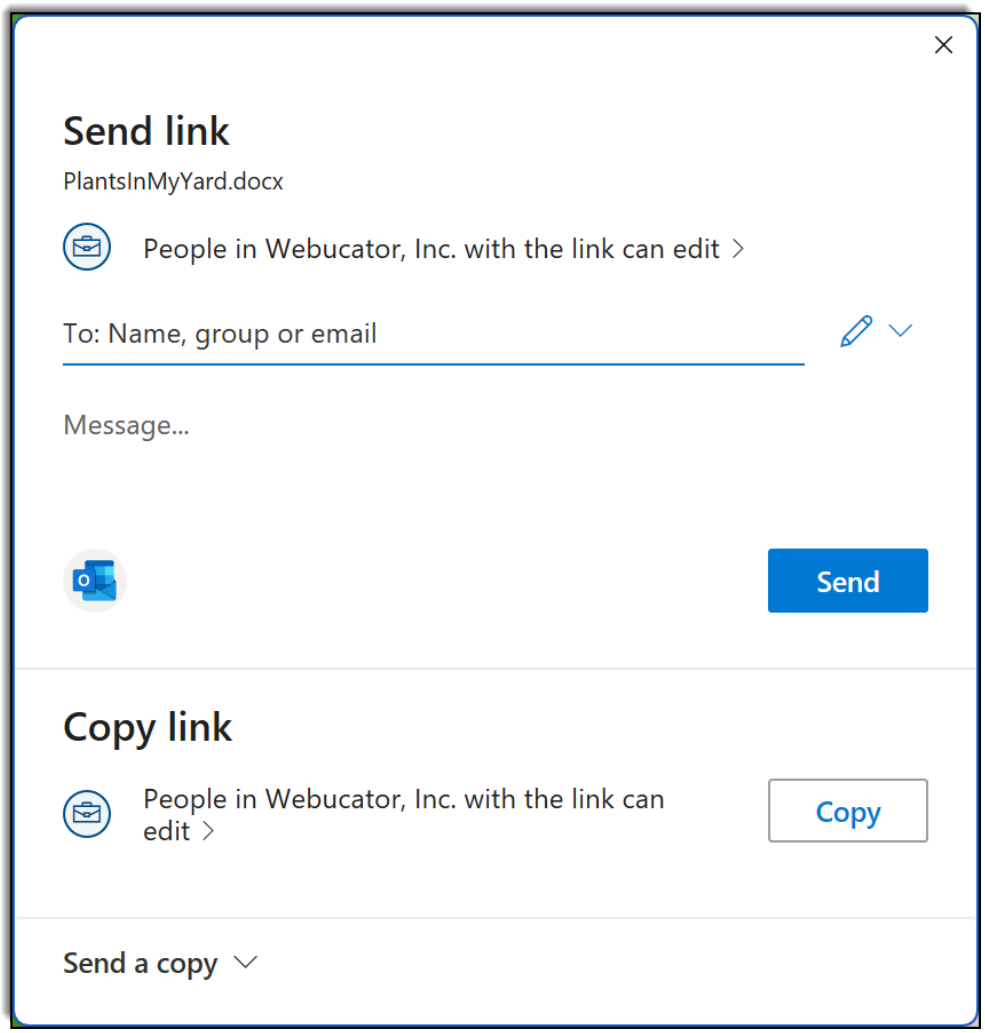


You can also click the **Share** button in the upper-right corner of the document to quickly access the Share options:



Clicking **Share** will bring up this dialog with more options:

EVALUATION COPY: Not to be used in class.



Conclusion

In this lesson, you learned to add and delete comments, to track changes and set and change tracking options, and to view changes, additions and comments. You also learned to use the **Reviewing** pane, to view markup, and to accept and reject changes.

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

LESSON 3
Comparing and Combining Documents

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Comparing document versions.

☑ Combining revisions made by various individuals into a single document.

Introduction

In this lesson, you will learn to compare document versions to see what has changed and to combine different revisions into a single Microsoft Word document.

EVALUATION COPY: Not to be used in class.

3.1. Comparing Documents

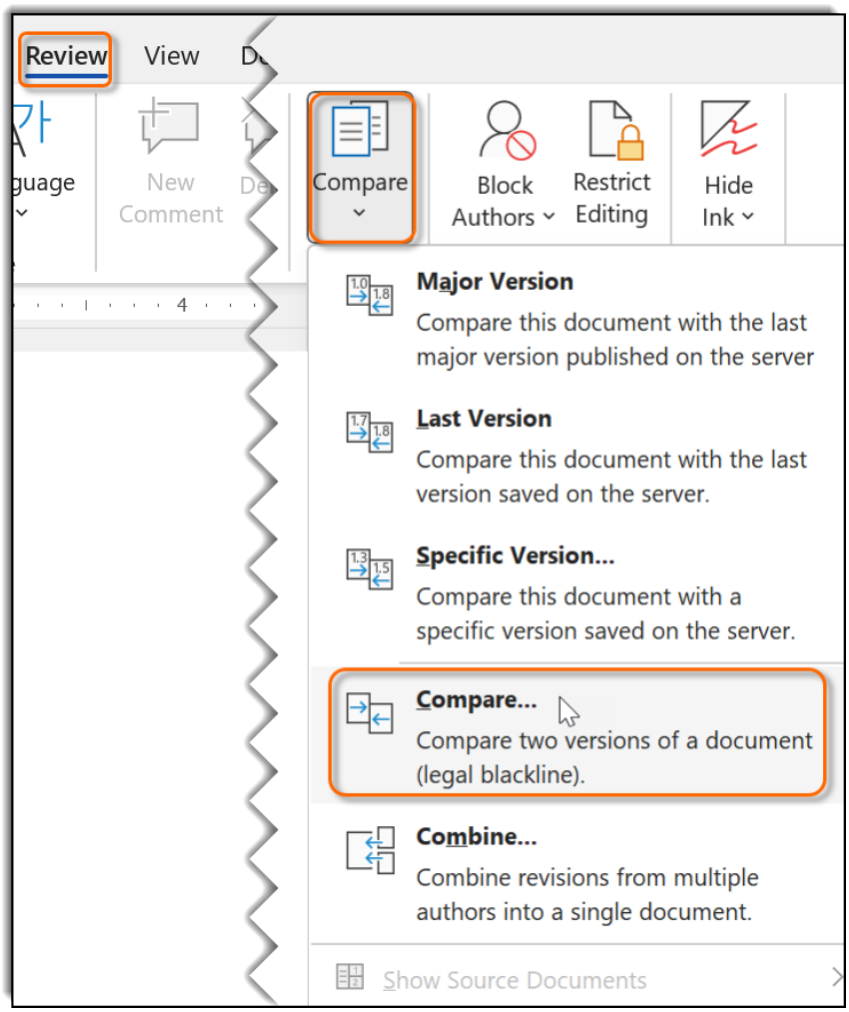
It can be helpful to compare one version of a document to another to see what has changed. For example:

1. An employee in the marketing department might create a document highlighting the benefits of a product and send it to a manager for review. The manager then makes a lot of changes, without tracking them, and returns it to the employee. To quickly find out what the manager changed, the employee can compare the original document with the version received back from the manager.
2. An individual sends a legal agreement to another person, who makes changes and returns it. To quickly find out what the person changed, the first individual can compare the original agreement with the version received back from the second person.

To compare two documents:

EVALUATION COPY: Not to be used in class.

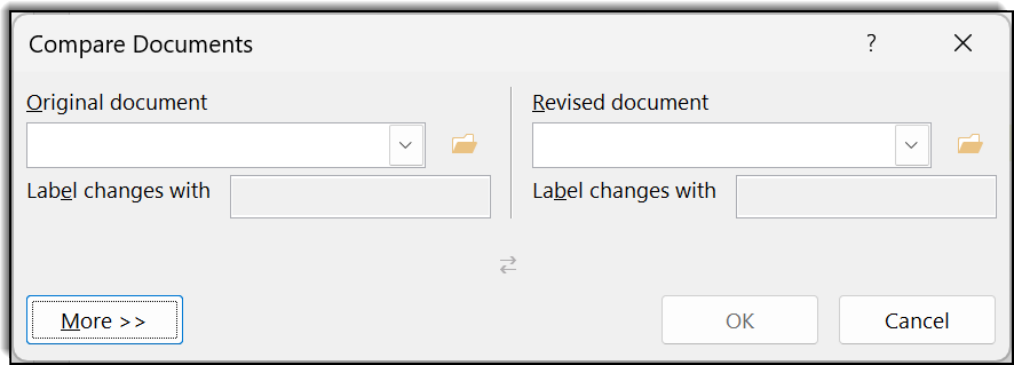
1. From within any Microsoft Word document (it does not have to be one of the ones you are comparing, but it can be), click the **Compare** command and select **Compare**:



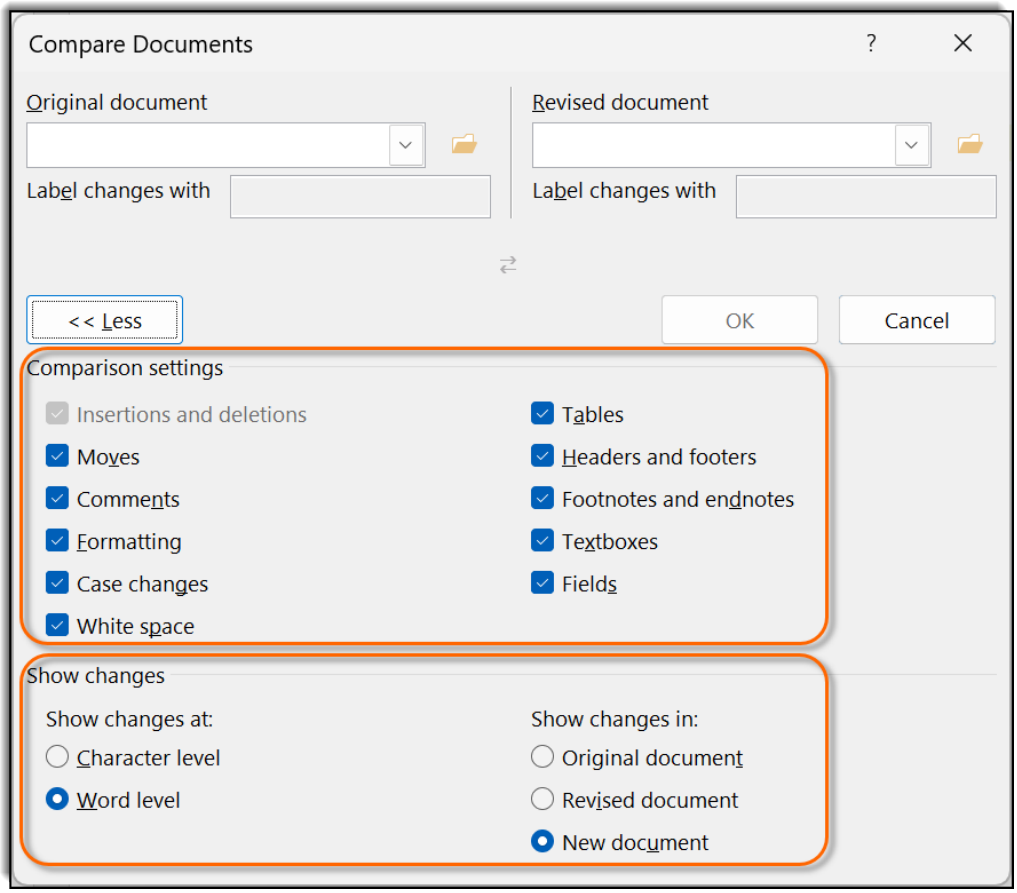
Note that the options for comparing the document to previous versions are only available if the document is stored in the cloud.

2. The **Compare Documents** dialog will open:

EVALUATION COPY: Not to be used in class.

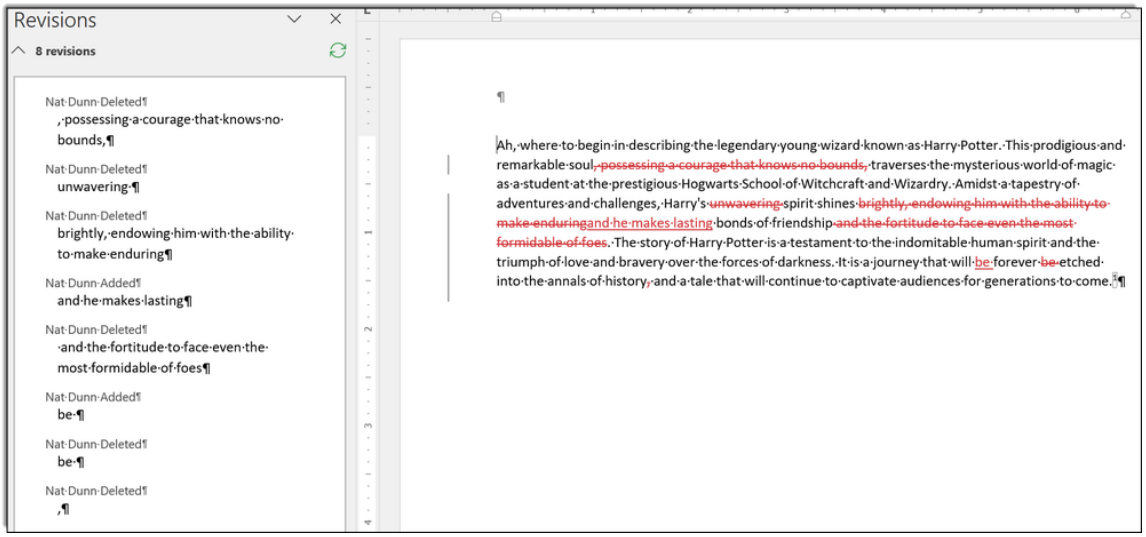


3. Choose the original and revised documents you wish to compare.
4. In the **Label unmarked changes with** boxes, Word will suggest who to attribute changes to. You can edit this if you want.
5. If necessary, click the **More>>** button to display the **Comparison settings** and **Show changes** sections:



EVALUATION COPY: Not to be used in class.

6. Under **Comparison settings**, select/deselect the types of comparisons you wish to check.
7. In the **Show changes** section, you can choose to show changes in the original document, the revised document or in a new document (the default).
8. Click **OK** to compare the documents. Differences will show up as tracked changes. The image below shows a comparison between `HarryPotter.docx` and `HarryPotter_Revised.docx`, both of which can be found in the `word365-comp-comb-docs/Demos` folder:



EVALUATION COPY: Not to be used in class.

Exercise 9: Comparing Documents

5 to 10 minutes

In this exercise, you will compare an original document with a revised version of the same document.

1. Open a blank Microsoft Word document or go to any Microsoft Word document you already have open.
2. Compare `GeneralTermsAndConditions.docx` with `GeneralTermsAndConditions_Revised.docx`, both of which are located in the `word365-comp-comb-docs/Exercises` folder.
3. Compare your results to the `GeneraTermsAndConditions_Compared.docx` file in the `word365-comp-comb-docs/Solutions` folder.
4. There is no need to save your file.

EVALUATION COPY: Not to be used in class.

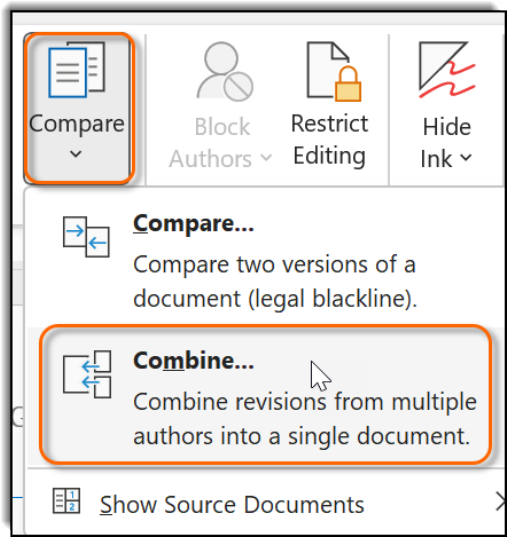
3.2. Combining Documents

It is often helpful to combine revisions of documents to view changes from multiple sources in a single document. For example, an employee in the marketing department might create a document highlighting the benefits of a product and send it to two different people at their company to review, both of whom make changes and return updated documents to the employee. To avoid going through each document individually, the employee can combine the documents. **IMPORTANT**: For this to work, the two people making revisions must be tracking changes.

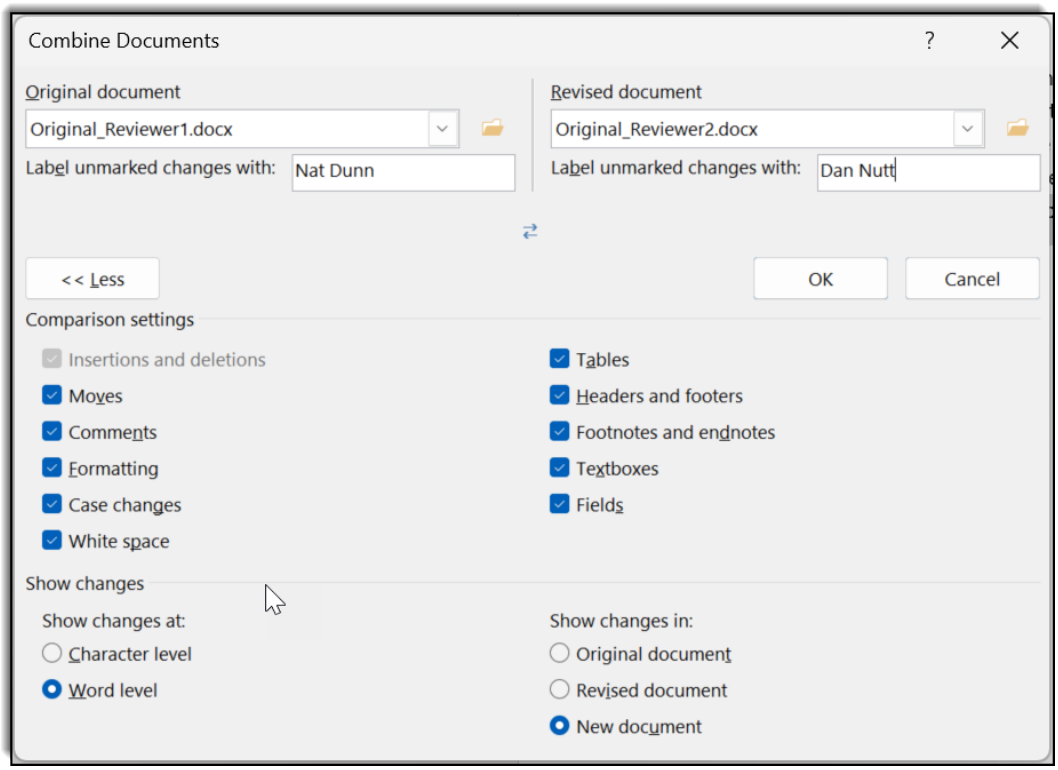
To combine two documents:

1. From within any Microsoft Word document (it does not have to be one of the ones you are comparing, but it can be), click the **Compare** command the **Review** tab and select **Combine**:

EVALUATION COPY: Not to be used in class.



2. In the **Combine Documents** dialog box:



A. Choose the original and revised documents you wish to combine.

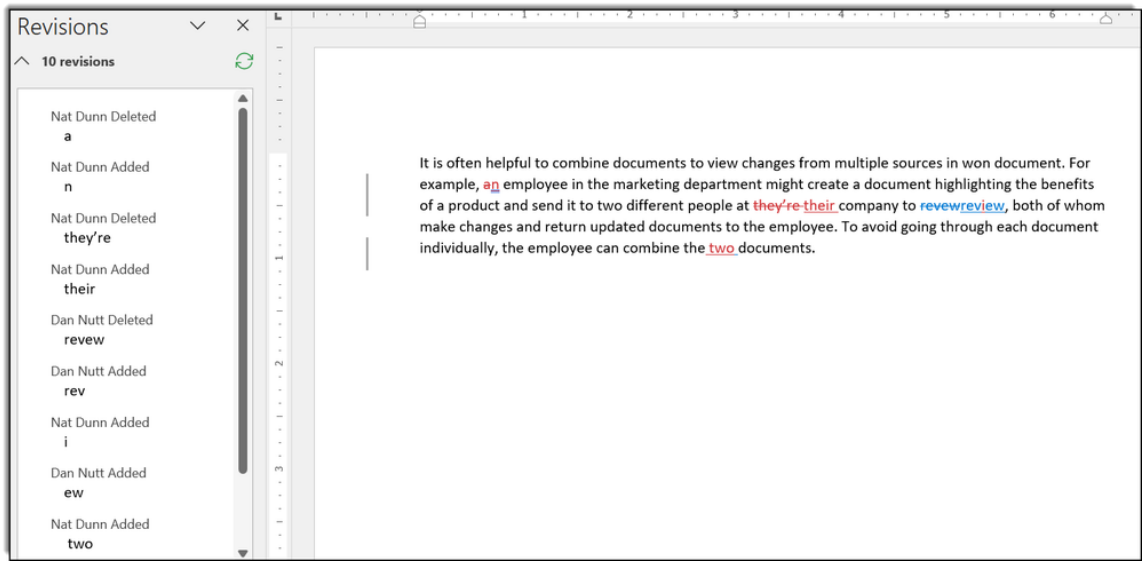
B. In the **Label unmarked changes with** boxes, Word will suggest who to attribute changes to. You can edit this if you want.

C. Under **Comparison settings**, select/deselect the types of things you wish to combine.

EVALUATION COPY: Not to be used in class.

D. In the **Show changes** section, you can choose to show changes in the original document, the revised document or in a new document (the default).

3. Click **OK** to combine the documents. Differences will show up as tracked changes.
4. If both documents contain formatting changes, Word will ask you to choose which formatting changes to keep. Select one of the documents and then press **Continue with Merge**.
5. The image below shows a comparison between `Original_Reviewer1.docx` and `Original_Reviewer2.docx`, both of which can be found in the `word365-comp-comb-docs/Demos` folder:



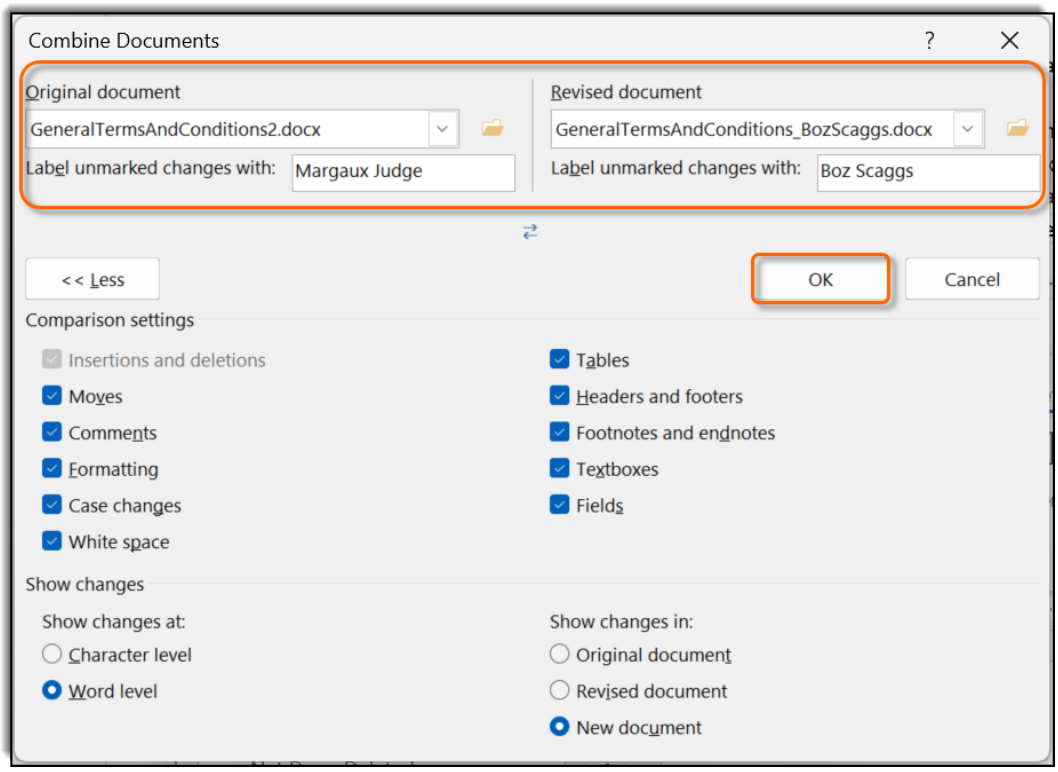
EVALUATION COPY: Not to be used in class.

Exercise 10: Combining Documents

5 to 10 minutes

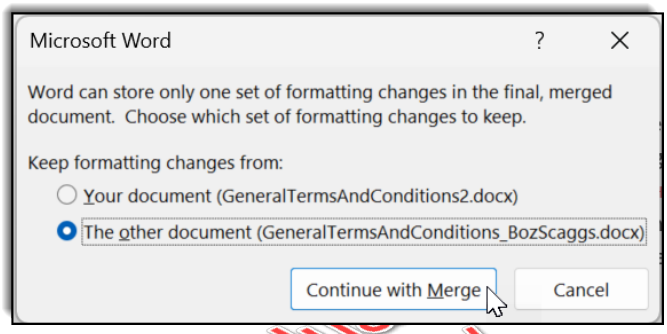
In this exercise, you will combine changes from two versions of a document.

1. Open a blank Microsoft Word document or go to any Word document you already have open.
2. Combine `GeneralTermsAndConditions2.docx` with `GeneralTermsAndConditions_BozScaggs.docx`, both of which are located in the `word365-comp-comb-docs/Exercises` folder:



3. Keep the formatting changes suggested by Boz Scaggs:

EVALUATION COPY: Not to be used in class.



4. Close the document without saving.

Evaluation Copy

Conclusion

In this lesson, you learned to compare documents to see what has changed between different versions of a document and to combine documents to see revisions made by various individuals in one document.

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

LESSON 4
Forms

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Showing the Developer tab.

☑ Forms.

☑ Date picker controls.

☑ Plain and rich text controls.

☑ Check boxes.

☑ Drop-down list controls.

☑ Restricting editing to form fields.

Evaluation Copy

Introduction

In this lesson, you will learn to create forms in Microsoft Word that users can fill out. Forms are made up of *content controls*, such as text boxes, check boxes, dropdown lists, and date pickers. You will learn how to add all of these to a Word document, and then to restrict editing so that other users can only fill out the form.

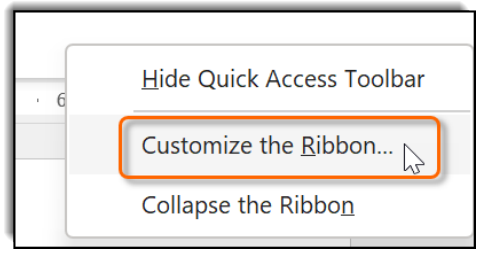
EVALUATION COPY: Not to be used in class.

4.1. Showing the Developer Tab

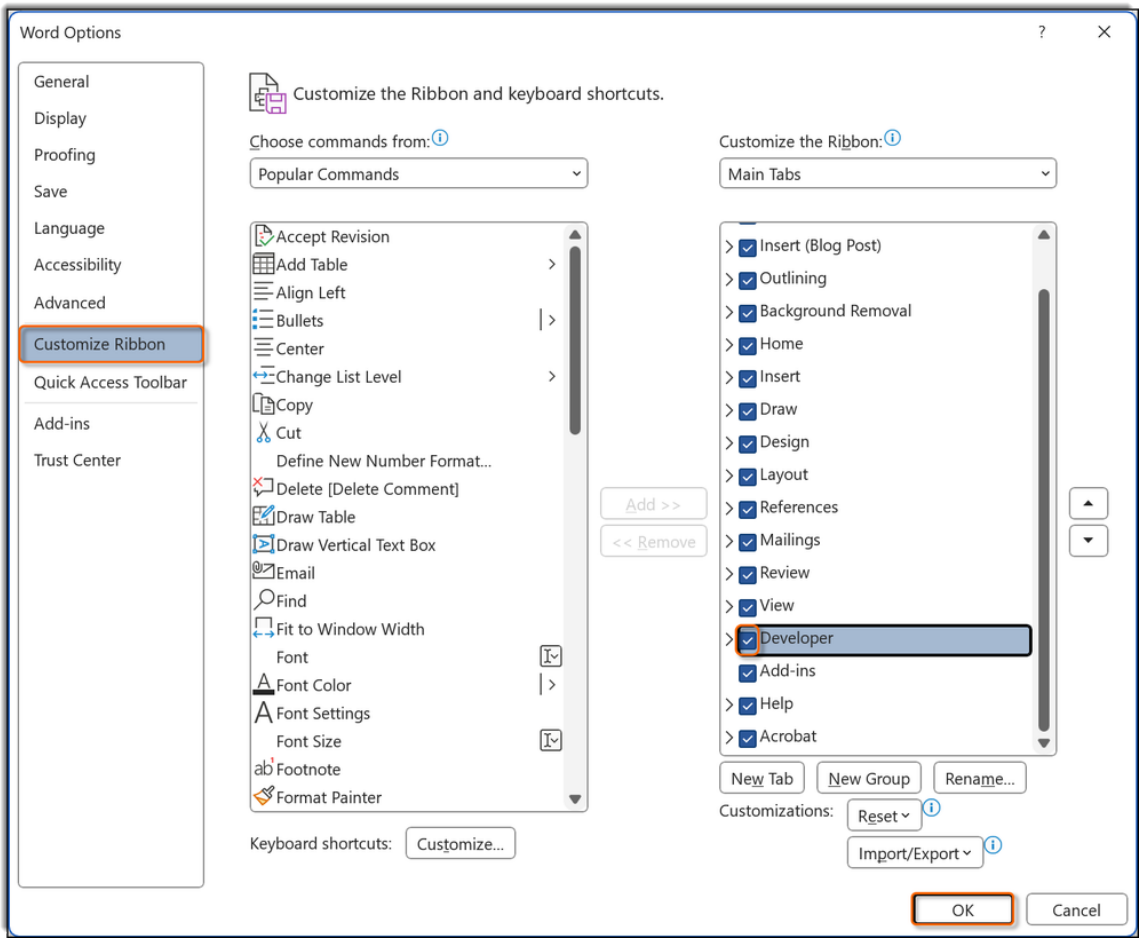
Before you can add content controls for your form, you must include the **Developer** tab on the Ribbon. To add it:

EVALUATION COPY: Not to be used in class.

1. Right-click the Ribbon and select **Customize the Ribbon…**:

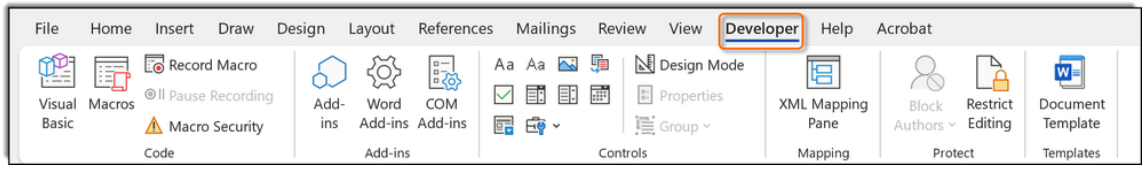


2. In the **Customize the Ribbon** section, check the **Developer** check box and then click **OK**:

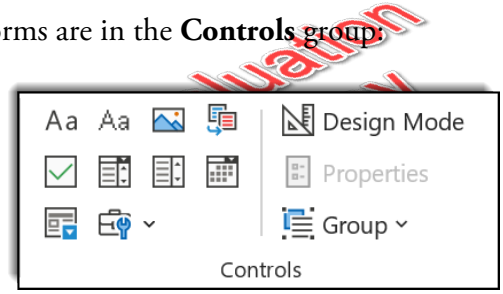


You should now see the **Developer** tab on the Ribbon:

EVALUATION COPY: Not to be used in class.



The commands for creating forms are in the **Controls** group:



In the rest of this lesson, we will walk you through the process of creating a form that looks like this:

EVALUATION COPY: Not to be used in class.

Ice Cream Order Form

Order Date:	Click or tap to enter a date.		
Contact Information			
First Name:	Click or tap here to enter text.	**Last Name:**	Click or tap here to enter text.
Email:	Click or tap here to enter text.	**Telephone:**	Click or tap here to enter text.
Order			
Cup or Cone:	Choose an item.		
Flavor:	Choose an item.		
Toppings	☐Sprinkles	☐Nuts	☐ Whipped Cream
Special Requests			
Click or tap here to enter text.			
☐I understand that I'm not really going to get any ice cream.			

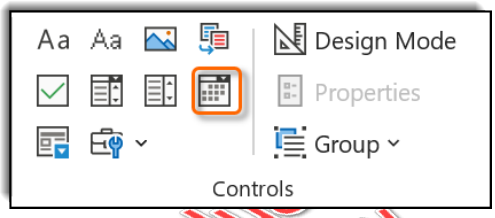
EVALUATION COPY: Not to be used in class.

Exercise 11: Date Picker Content Control

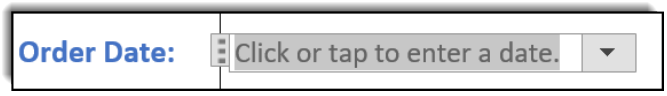
5 to 10 minutes

In this exercise, you will add a **Date Picker Content Control** to a document.

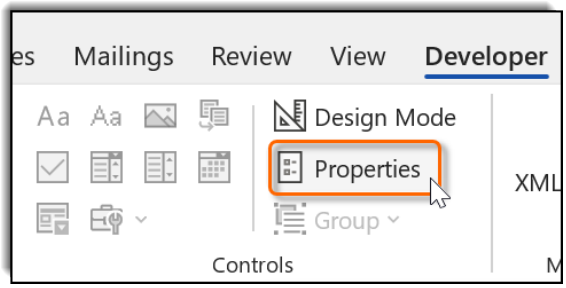
1. Open `IceCreamOrderForm.docx` from the `word365-forms/Exercises` folder. This document already has a table with form labels created. Throughout this and the following exercises, you will be adding the content controls.
2. Place the cursor in the table cell to the right of the **Order Date:** label.
3. In the **Controls** group of the **Developer** tab, click the **Date Picker Content Control** button:



A form control should get added at the cursor location:

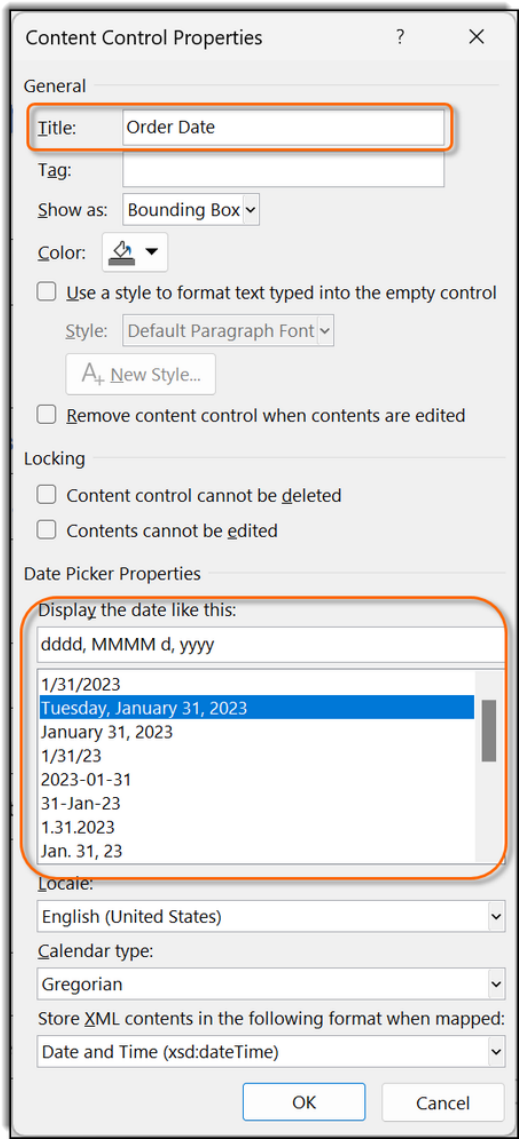


4. Each time you enter a new form control, you should immediately modify its properties. Do so by clicking the **Properties** command in the **Controls** group of the **Developer** tab:



5. In the **Content Control Properties** dialog, enter a **Title**, which usually corresponds to the form label, and choose a date format:

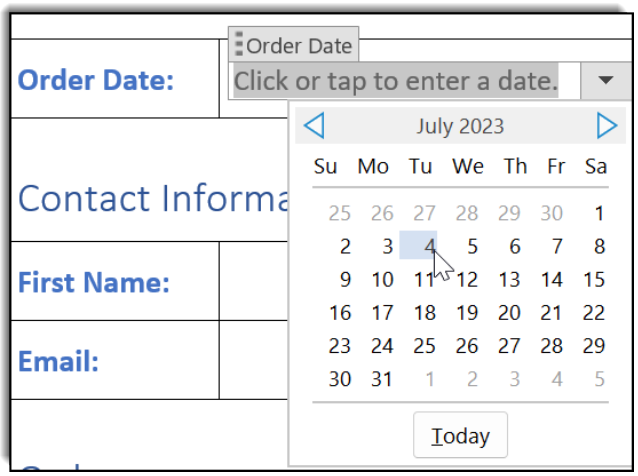
EVALUATION COPY: Not to be used in class.



Usually, that's all you need for the **Date Picker Content Control** properties, but feel free to explore the other options as well. When you're done, click **OK**.

You will now be able to select a date from the **Order Date** control:

EVALUATION COPY: Not to be used in class.



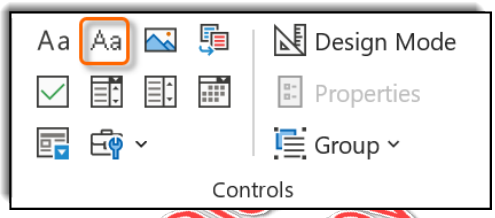
EVALUATION COPY: Not to be used in class.

Exercise 12: Plain Text Content Control

10 to 15 minutes

In this exercise, you will add several **Plain Text Content Controls** to a document.

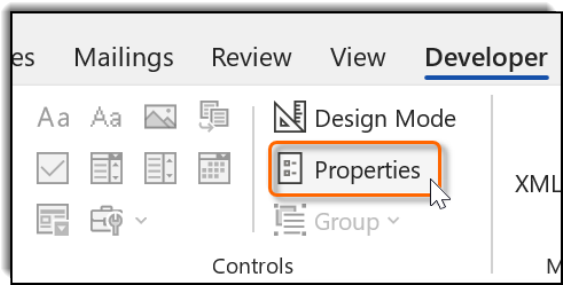
1. If it's not still open, open `IceCreamOrderForm.docx` from the `word365-forms/Exercises` folder.
2. Place the cursor in the table cell to the right of the **First Name:** label.
3. In the **Controls** group of the **Developer** tab, click the **Plain Text Content Control** button:



Evaluation Copy

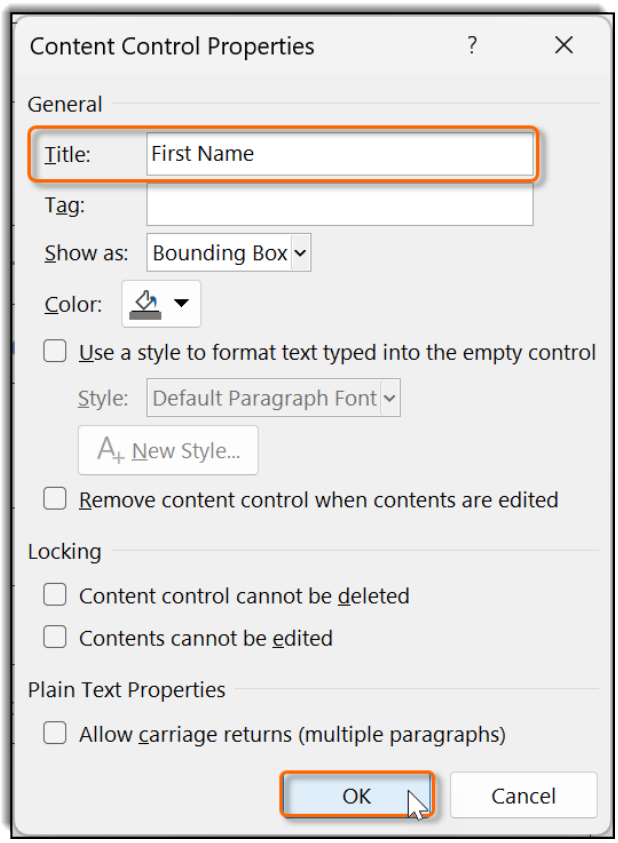
A form control should get added at the cursor location:

4. Click **Properties** command in the **Controls** group of the **Developer** tab:

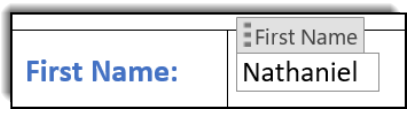


5. In the **Content Control Properties** dialog, enter a **Title** and click **OK**:

EVALUATION COPY: Not to be used in class.



You will now be able to add text in the **First Name** control:



Repeat the same steps to add **Plain Text Content Controls** for **Last Name**, **Email**, and **Telephone**.

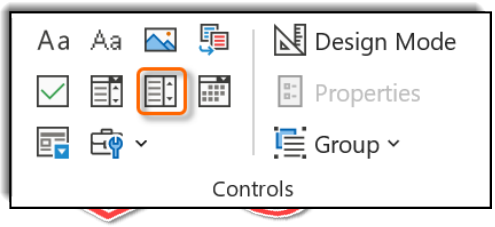
EVALUATION COPY: Not to be used in class.

Exercise 13: Drop-Down List Content Control

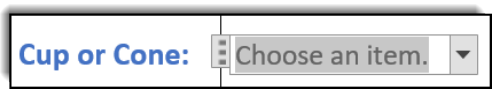
10 to 15 minutes

In this exercise, you will add a couple of **Drop-Down List Content Controls** to a document.

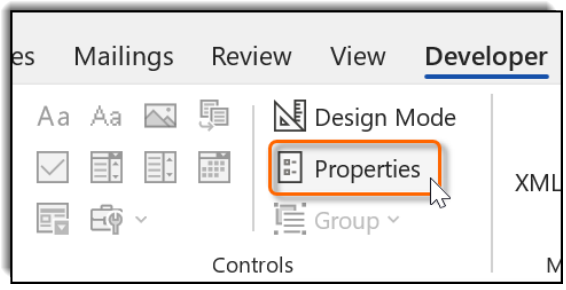
1. If it's not still open, open `IceCreamOrderForm.docx` from the `word365-forms/Exercises` folder.
2. Place the cursor in the table cell to the right of the **Cup or Cone:** label.
3. In the **Controls** group of the **Developer** tab, click the **Drop-Down List Content Control** button:



A form control should get added at the cursor location:

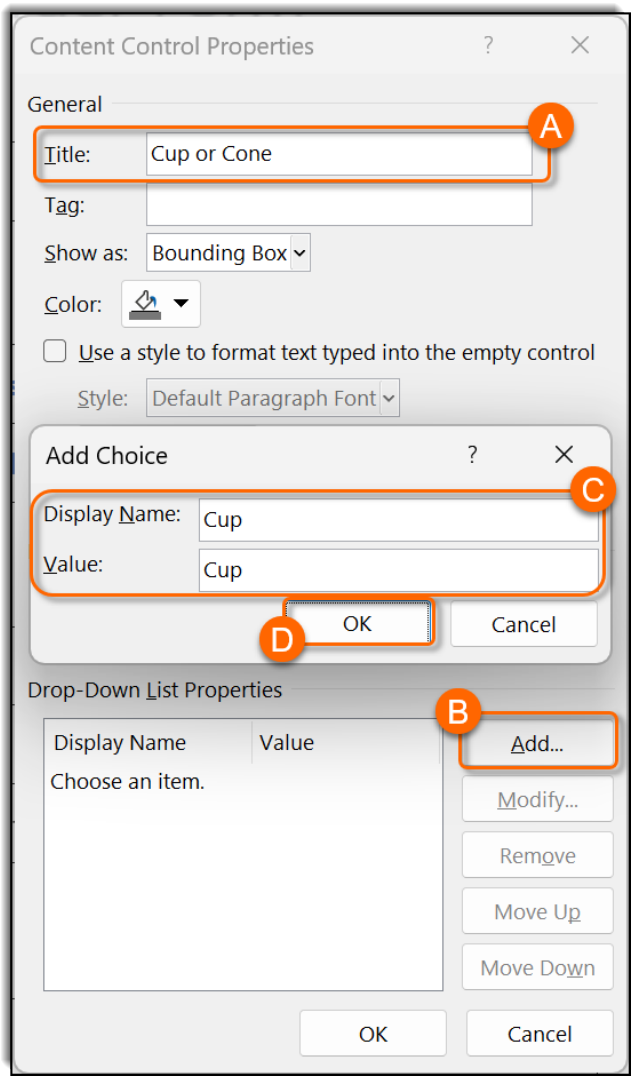


4. Click **Properties** command in the **Controls** group of the **Developer** tab:



5. In the **Content Control Properties** dialog:

EVALUATION COPY: Not to be used in class.



A. Enter a **Title**.

B. Under **Drop-Down List Properties**, click the **Add** button.

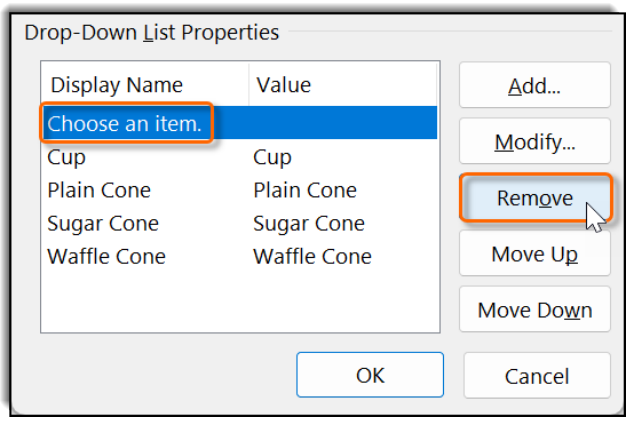
C. The **Add Choice** dialog will open up. Enter "Cup" for both the **Display Name** and the **Value**.

D. Click **OK**.

E. Click **Add** again and add three additional choices: "Plain Cone," "Sugar Cone," and "Waffle Cone."

F. Highlight the "Choose an item" option and click **Remove**:

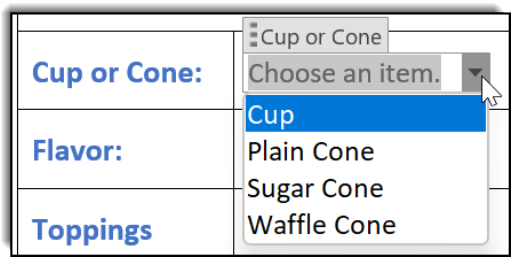
EVALUATION COPY: Not to be used in class.



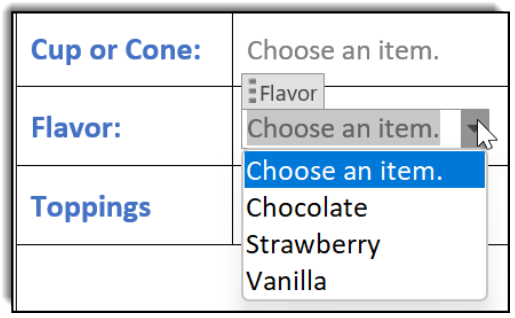
The drop-down control will still say "Choose an item" before it is clicked, but "Choose an item" will not be one of the options you can choose.

G. Click **OK** to close the **Content Control Properties** dialog.

You will now be able to pick an option from the **Cup or Cone** control:



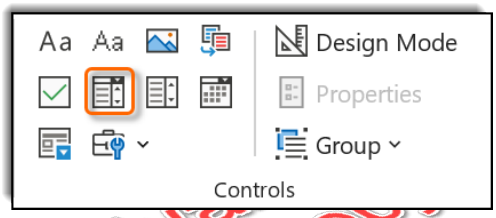
Repeat the same steps to add a **Drop-Down List Content Control** for **Flavor** with whatever flavors you want to offer, but this time, don't remove "Choose an item," so you can see the difference:



Combo Box Content Control

The **Combo Box Content Control** button is located to the immediate left of the **Drop-Down List Content Control** button:

EVALUATION COPY: Not to be used in class.



It works the same except that it allows users to type in a value as well as select from the available options.

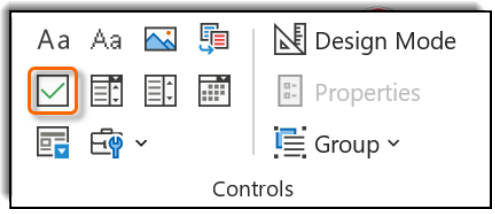
EVALUATION COPY: Not to be used in class.

Exercise 14: Check Box Content Control

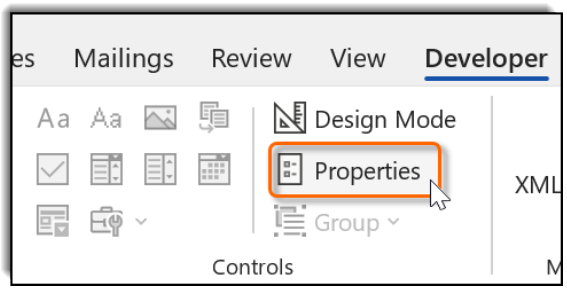
10 to 15 minutes

In this exercise, you will add several **Check Box Content Controls** to a document.

1. If it's not still open, open `IceCreamOrderForm.docx` from the `word365-forms/Exercises` folder.
2. Place the cursor immediately to the left of the word "Sprinkles" in the table cell to the right of the **Toppings:** label.
3. In the **Controls** group of the **Developer** tab, click the **Check Box Content Control** button:

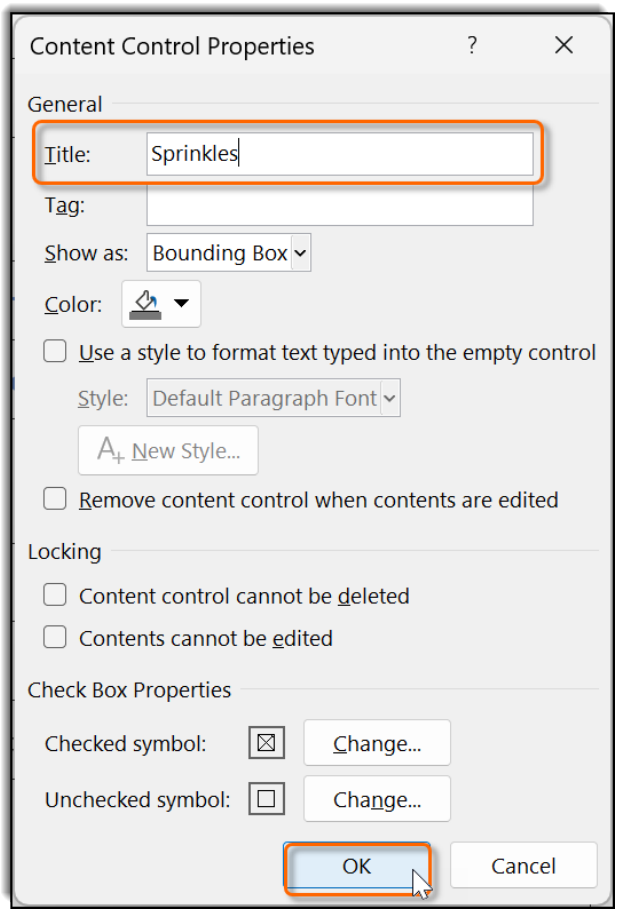


4. Click **Properties** command in the **Controls** group of the **Developer** tab:

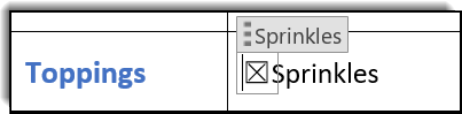


5. In the **Content Control Properties** dialog, enter a **Title** and click **OK**:

EVALUATION COPY: Not to be used in class.



You will now be able to check/uncheck the **Sprinkles** control:



Repeat the same steps to add **Check Box Content Controls** for **Nuts**, **Whipped Cream**, and **I understand that I'm not really going to get any ice cream.**

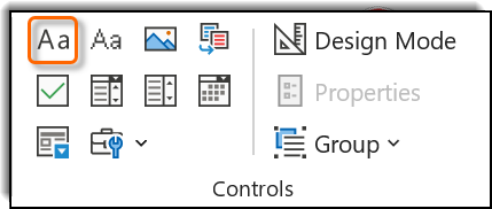
EVALUATION COPY: Not to be used in class.

Exercise 15: Rich Text Content Control

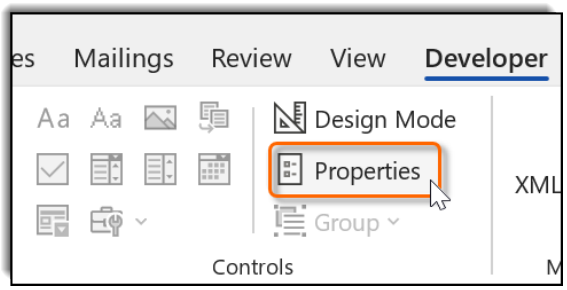
5 to 10 minutes

In this exercise, you will add a **Rich Text Content Control** to a document. Unlike a **Plain Text Content Control**, **Rich Text Content Control** allows users to add formatting in their response.

1. If it's not still open, open `IceCreamOrderForm.docx` from the `word365-forms/Exercises` folder.
2. Place the cursor in the table cell below the **Special Request:** heading.
3. In the **Controls** group of the **Developer** tab, click the **Rich Text Content Control** button:

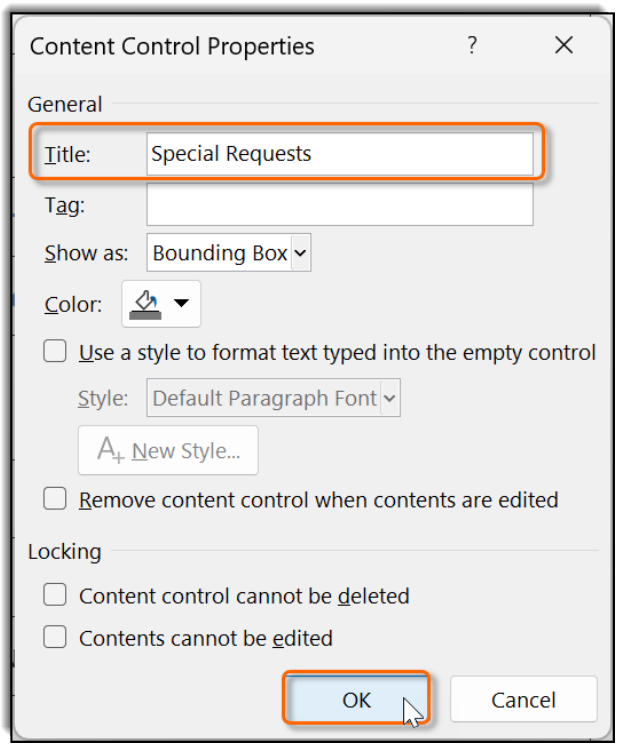


4. Click **Properties** command in the **Controls** group of the **Developer** tab:

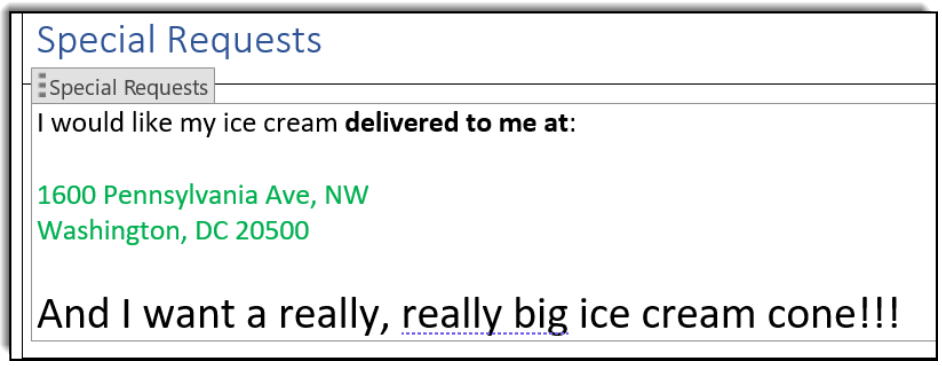


5. In the **Content Control Properties** dialog, enter a **Title** and click **OK**:

EVALUATION COPY: Not to be used in class.



You will now be able to add text in the **Special Request** control:



EVALUATION COPY: Not to be used in class.

Exercise 16: Restricting Editing to Form Fields

10 to 20 minutes

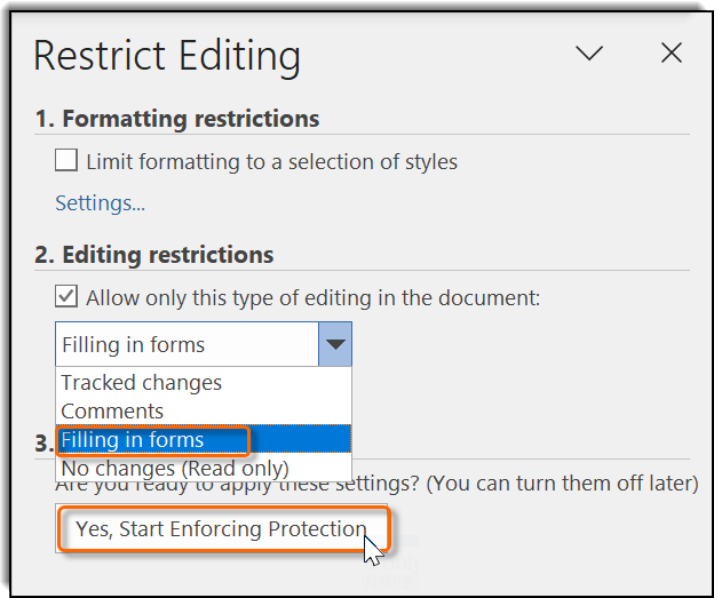
In this exercise, you will restrict editing of the document, so that users can only fill out the form. They won't be able to make other changes to the document.

1. On the **Review** tab in the **Protect** group, click **Restrict Editing**:

   This will bring up the **Restrict Editing** pane.

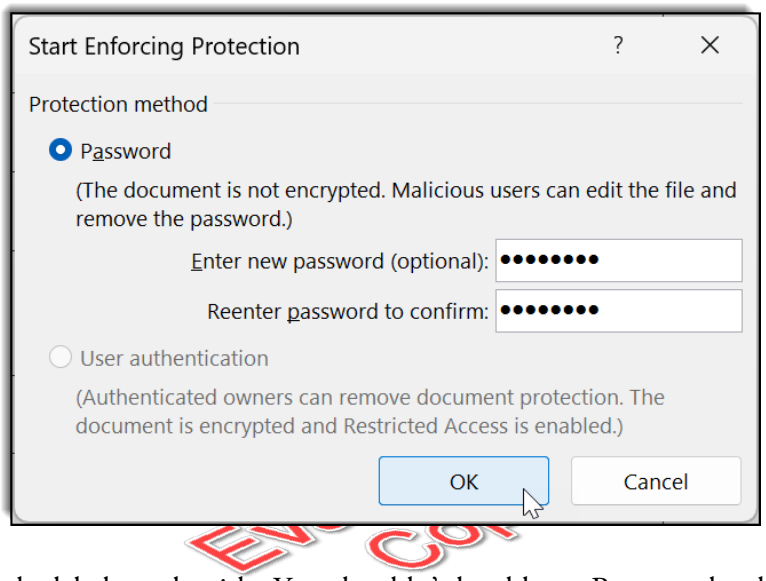
2. Under **2. Editing restrictions**, select "Filling in forms," and then under **3. Start enforcement**, click **Yes, Start Enforcing Protection**:

Evaluation Copy



3. In the **Start Enforcing Protection** dialog, enter and reenter a password (we just used "password" for this demo) and click **OK**:

EVALUATION COPY: Not to be used in class.



4. Try to edit the labels or the title. You shouldn't be able to. But you should still be able to fill out the form.

You can now share this form with others for them to fill out, save, and return to you.

Conclusion

In this lesson, you learned to create a form with many different types of controls and to restrict editing of the document to just filling out the form.

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

LESSON 5
Managing Mailings

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Envelopes.

☑ Labels.

☑ Mail merge.

Introduction

In this lesson, you will learn to create and print envelopes and labels in Microsoft Word, to use mail merge to print or email form letters to multiple recipients, and to select mail merge recipients from an existing list.

EVALUATION COPY: Not to be used in class.

5.1. Creating Envelopes and Labels

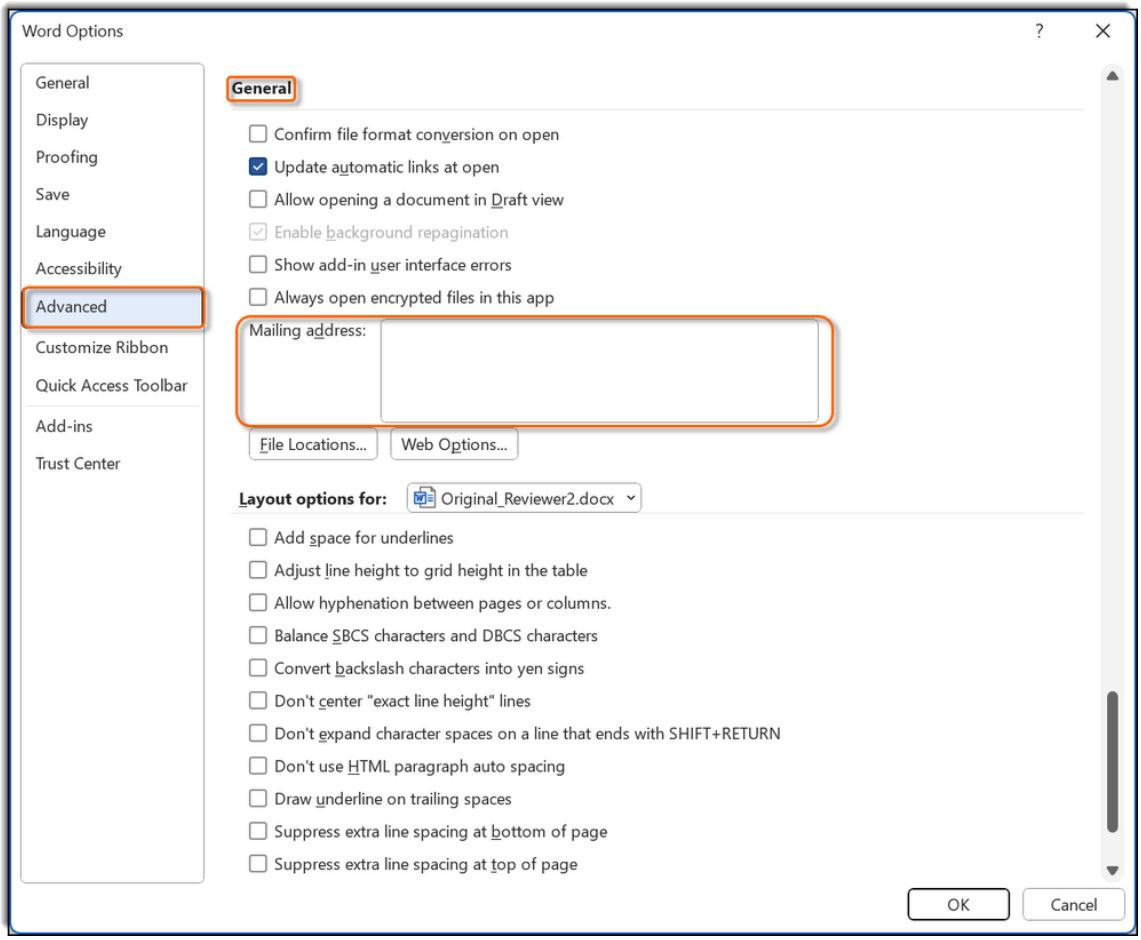
Printing individual envelopes and labels from Microsoft Word is easy. You can enter the delivery and return addresses or, if you use Microsoft Outlook, select them from your Outlook address book.

Some things to be aware of when creating envelopes and labels:

1. You need to have a document open in order to create an envelope or label.
2. If your document has the delivery address in it (e.g., a letter), Word will automatically insert that into the envelope or label. You can also select the address, then click **Envelopes** or **Labels** in the **Create** group of the **Mailings** tab.

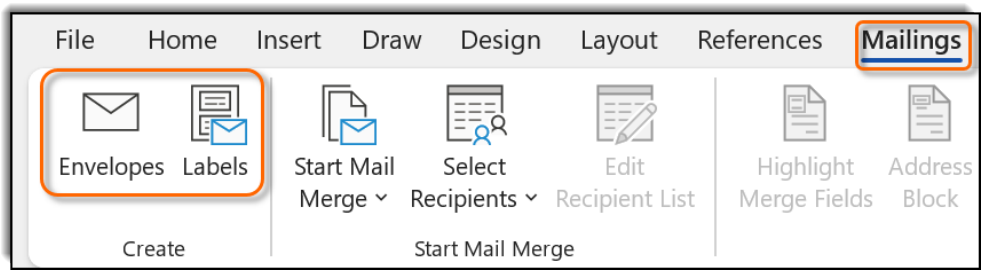
EVALUATION COPY: Not to be used in class.

3. You can specify a standard return address in the **Advanced** settings of the **Word Options** dialog. Scroll to the bottom of the settings and enter a **Mailing address** in the **General** group:



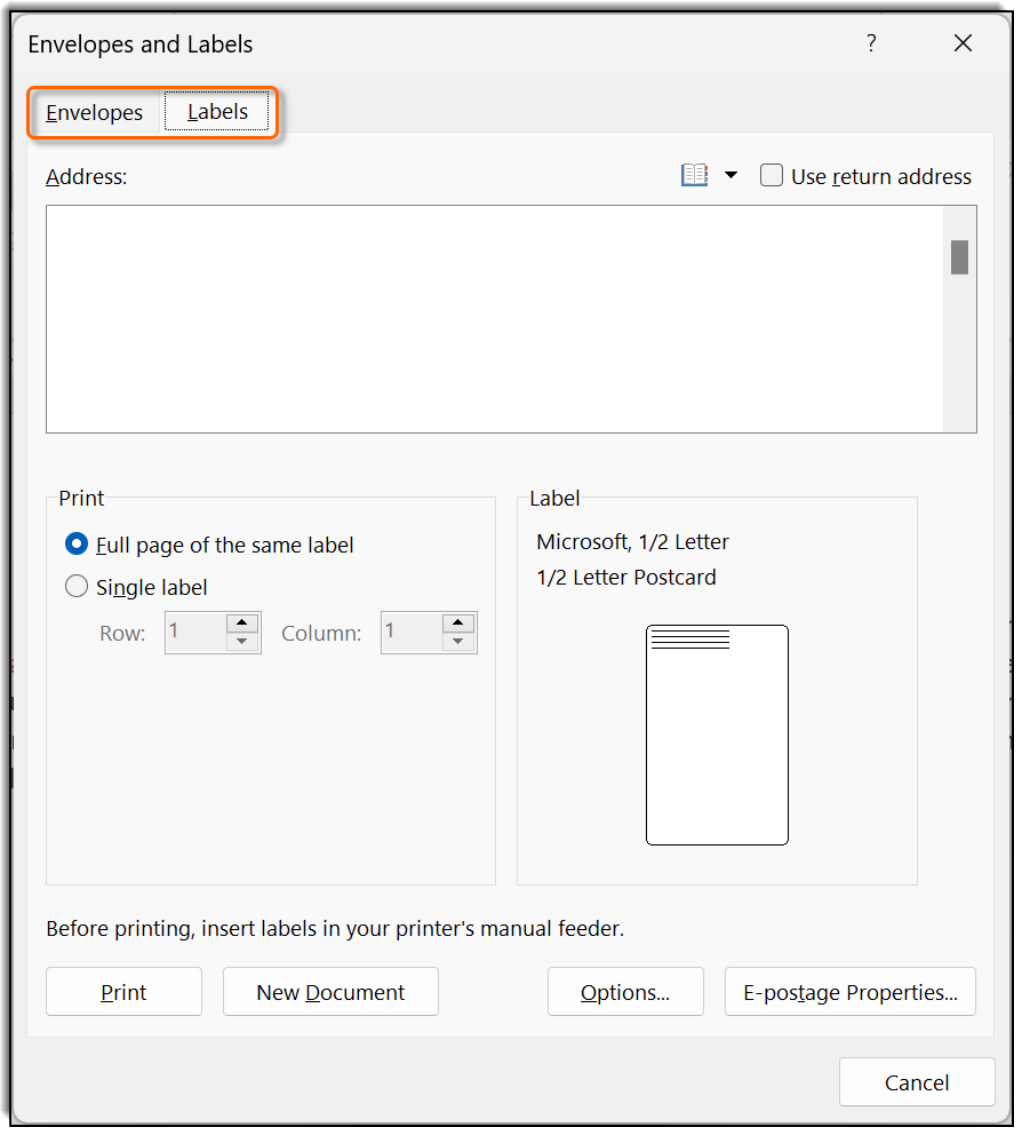
To create envelopes and labels in Microsoft Word:

1. On the **Mailings** tab in the **Create** group, click **Envelopes** or **Labels**, both of which open the **Envelopes and Labels** dialog box:



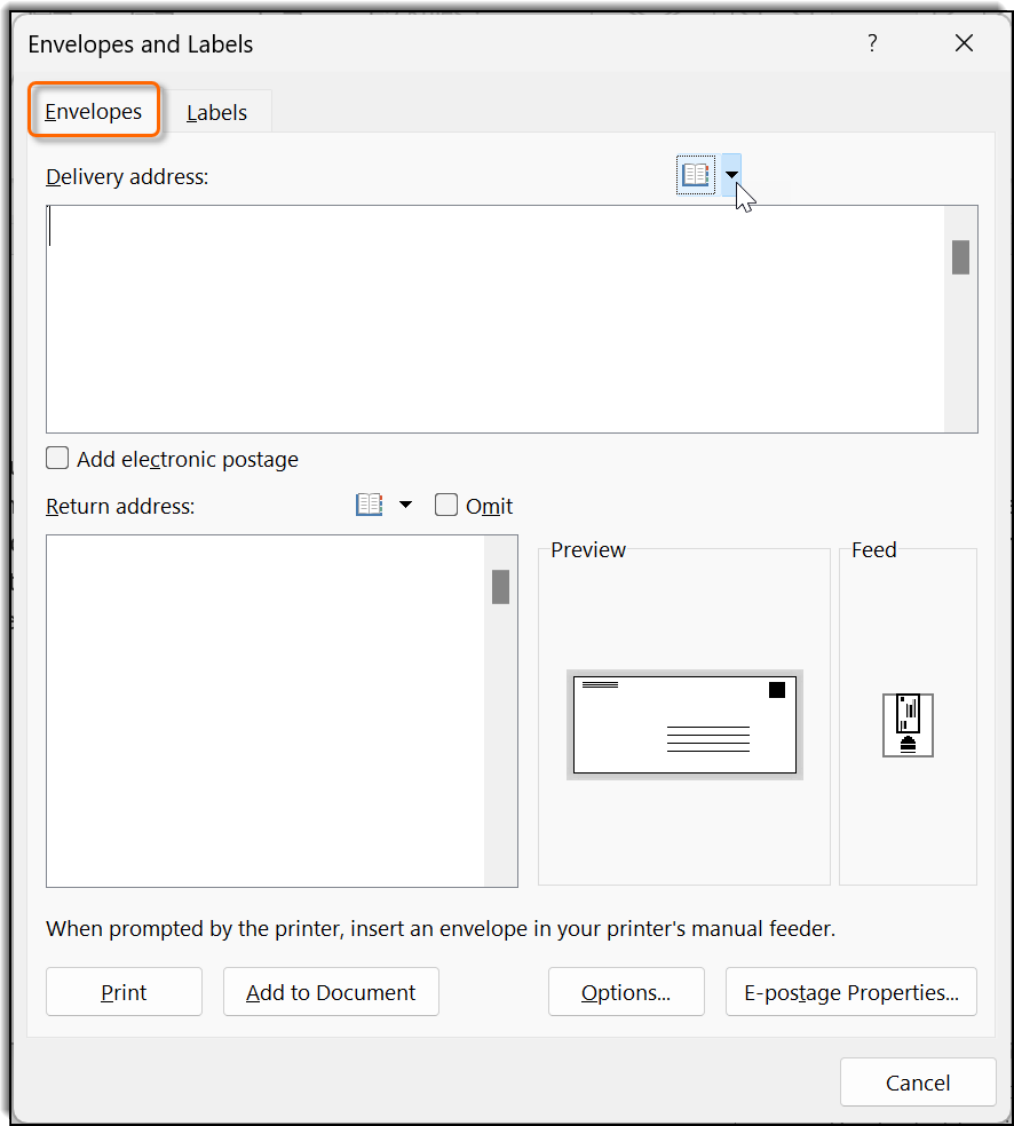
EVALUATION COPY: Not to be used in class.

2. In the **Envelopes and Labels** dialog box, choose **Envelopes** or **Labels**:



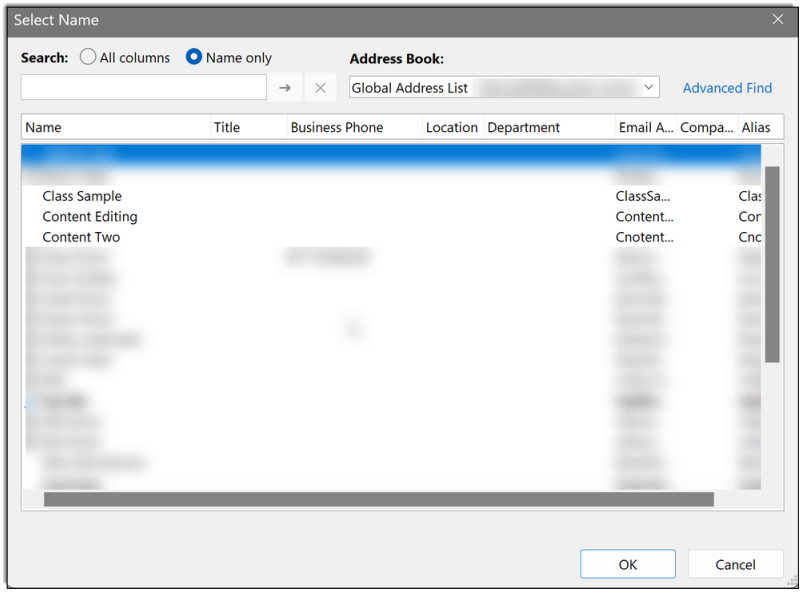
EVALUATION COPY: Not to be used in class.

❖ 5.1.1. Envelopes



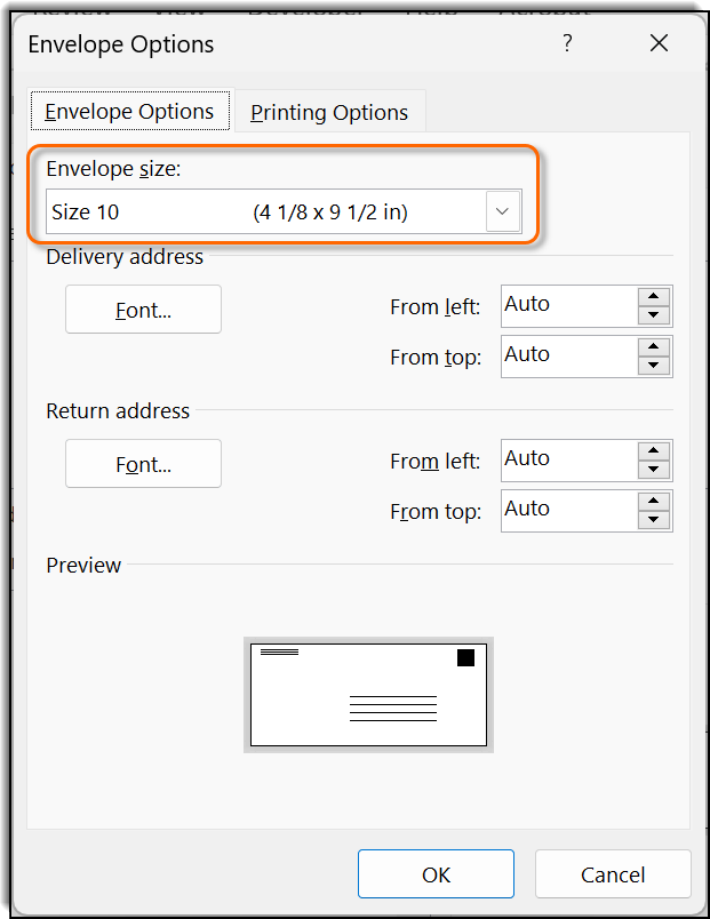
1. Enter the **Delivery address** or click the address book icon above the **Delivery address** field to select an address.
2. To use the address book icon, you must have Outlook set up on your computer. You can then select the address book and individual in the **Select Name** dialog box and click **OK**:

EVALUATION COPY: Not to be used in class.



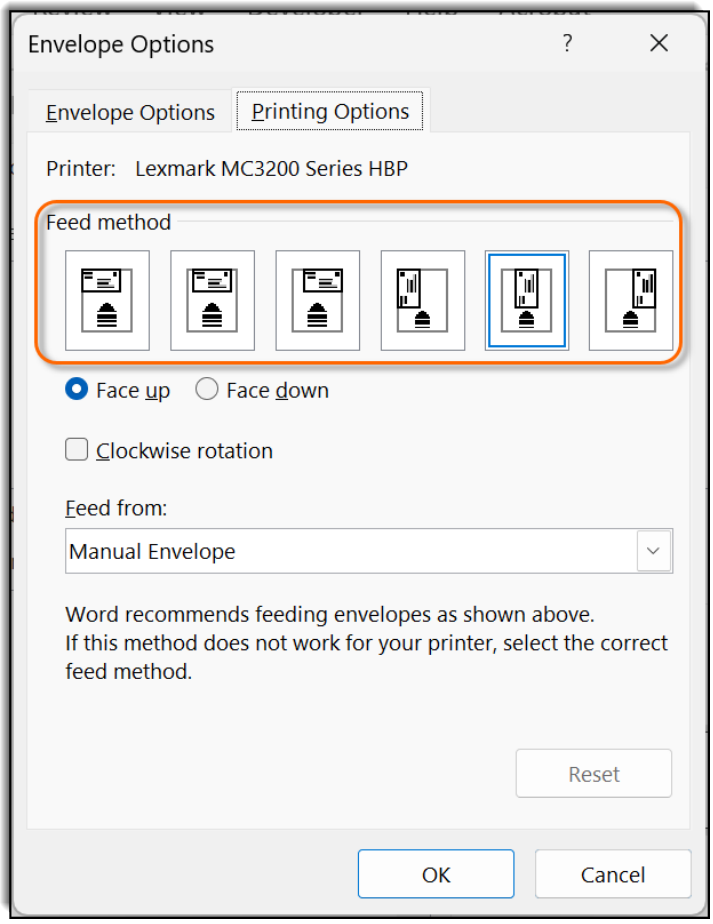
3. Enter the **Return address** or click the address book icon to select an address (again, you must have Outlook set up on your computer to use the address book icon).
4. Click **Options** at the bottom of the dialog to open the **Envelope Options** dialog:
    A. On the **Envelope Options** tab, select the size envelope you will print to:

EVALUATION COPY: Not to be used in class.



B. On the **Printing Options** tab of the **Envelope Options** dialog box, select the method via which you will feed the envelope into your printer:

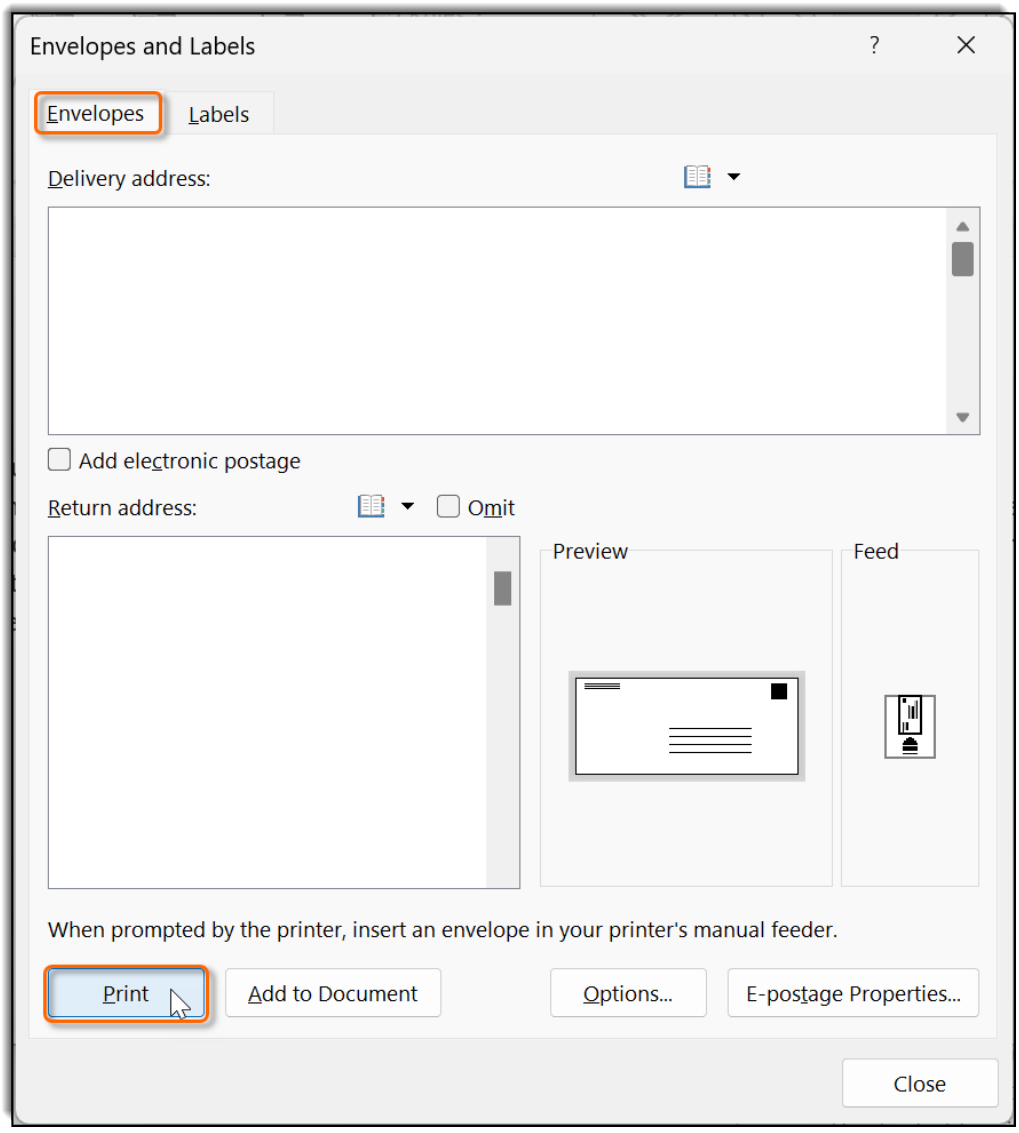
EVALUATION COPY: Not to be used in class.



C. Click **OK** to close the **Envelope Options** dialog.

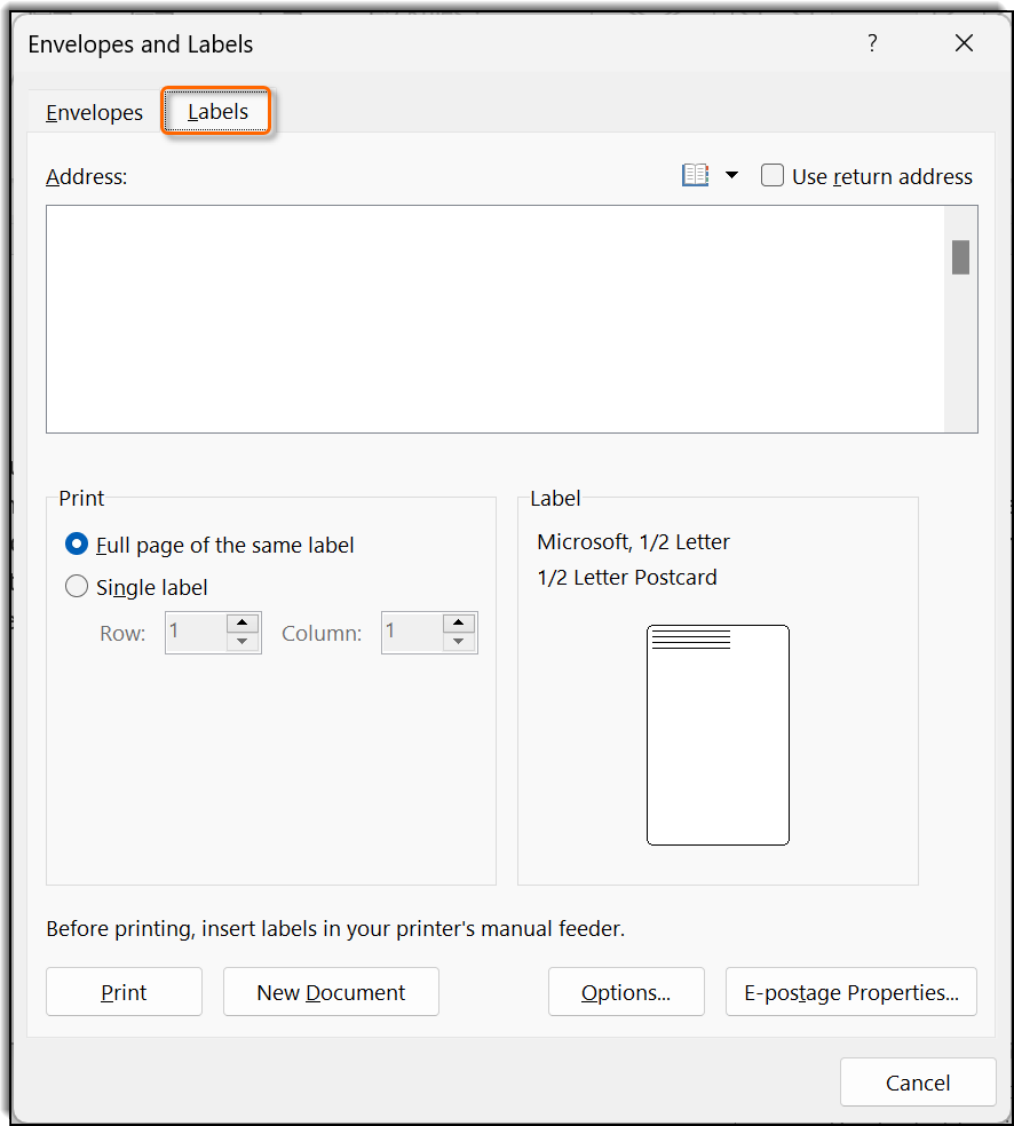
D. Click **Print** to print the envelope:

EVALUATION COPY: Not to be used in class.



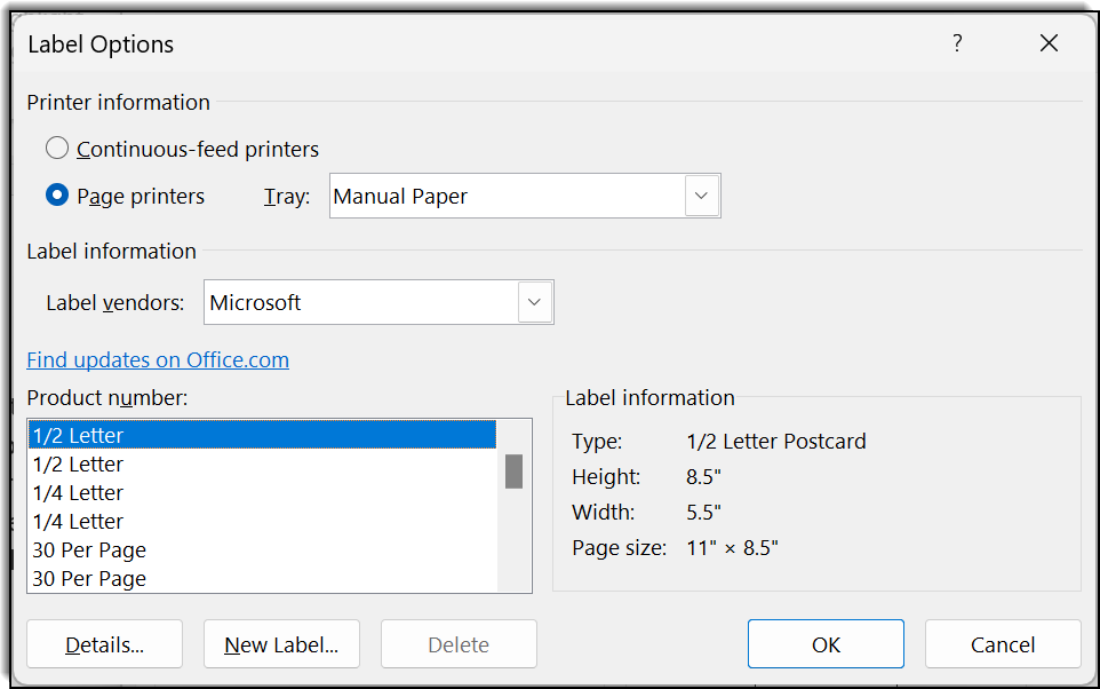
EVALUATION COPY: Not to be used in class.

❖ 5.1.2. Labels



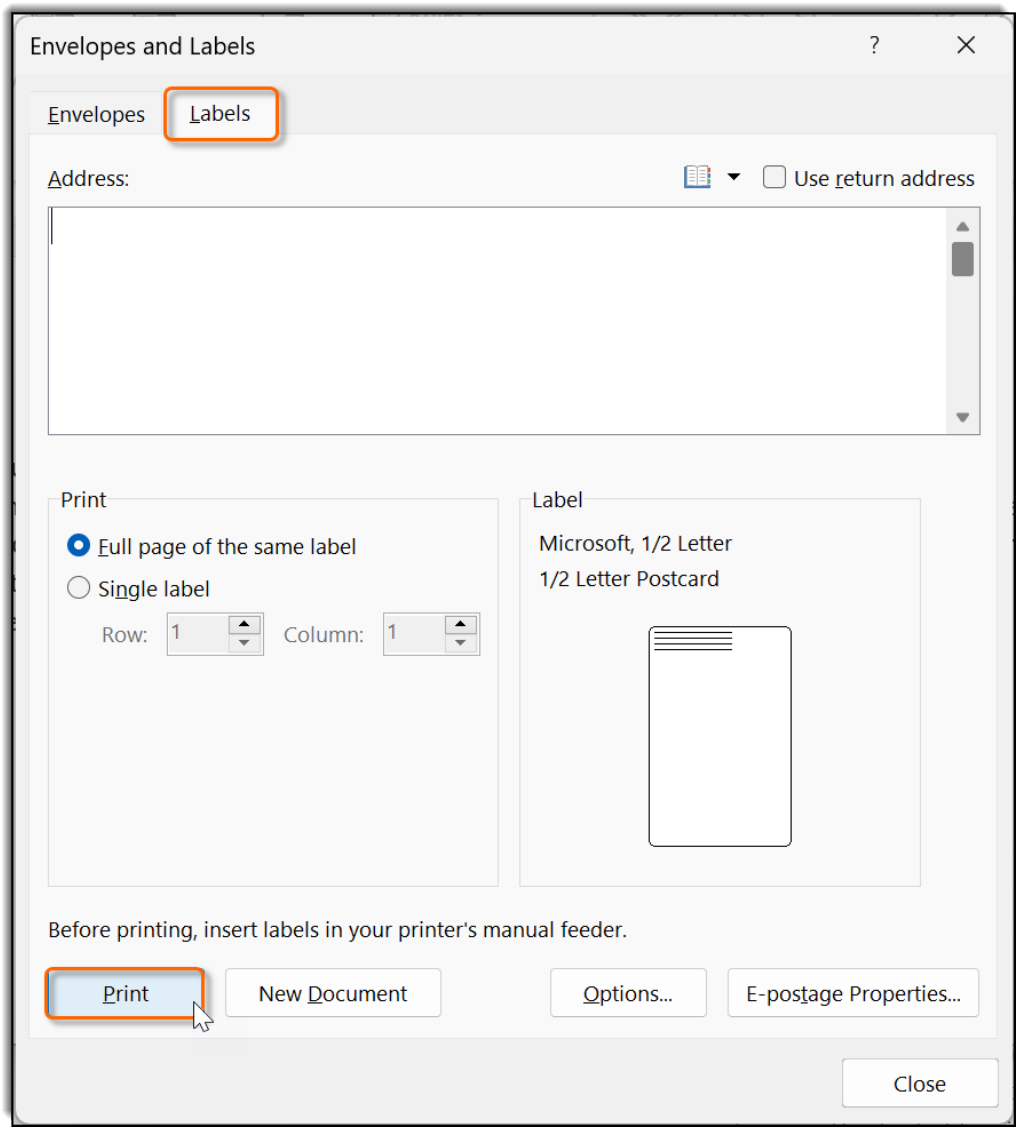
1. Enter the **Address** or click the address book icon to select an address (again, you must have Outlook set up on your computer to use the address book icon).
2. If you already entered addresses on the **Envelopes** tab, the delivery address will already be filled in. You can switch to the return address by checking **Use return address**.
3. Click **Options** to open the **Label Options** dialog and select the printer and label information and click **OK**:

EVALUATION COPY: Not to be used in class.



4. Click **Print** to print the label:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

Exercise 17: Printing an Envelope

5 to 10 minutes

In this exercise, you will print an envelope. The envelope should have both a delivery and return address. You can use whatever addresses you like or use the following:

❖ E17.1. Delivery Address

```
Thomas Jefferson
The White House
1600 Pennsylvania Avenue, N.W.
Washington, DC 20500
```

❖ E17.2. Return Address

```
John Adams
141 Franklin St
Quincy, MA 02169
```

EVALUATION COPY: Not to be used in class.

5.2. Using Mail Merge

Mail merge is most often used to print or email form letters to multiple recipients. Using mail merge, you can easily customize form letters for individual recipients. Mail merge is also used to create envelopes or labels in bulk.

There are two ways to create a Mail Merge:

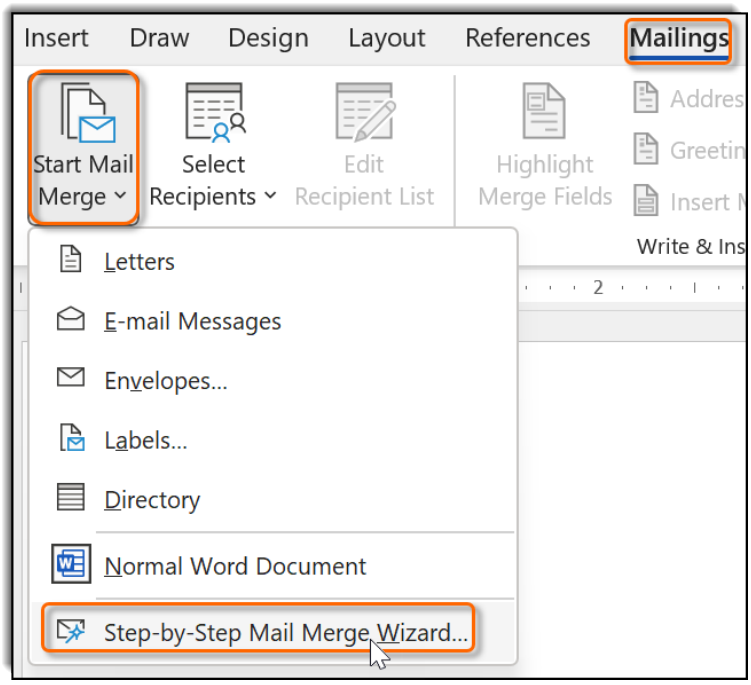
1. Use the **Mail Merge Wizard**.
2. Use the commands on the **Mailings** tab.

EVALUATION COPY: Not to be used in class.

The two ways are not mutually exclusive. You can start with the **Mail Merge Wizard** and then use commands to make additional changes. Below we will demonstrate in detail how to use the **Mail Merge Wizard** to create a mail merge.

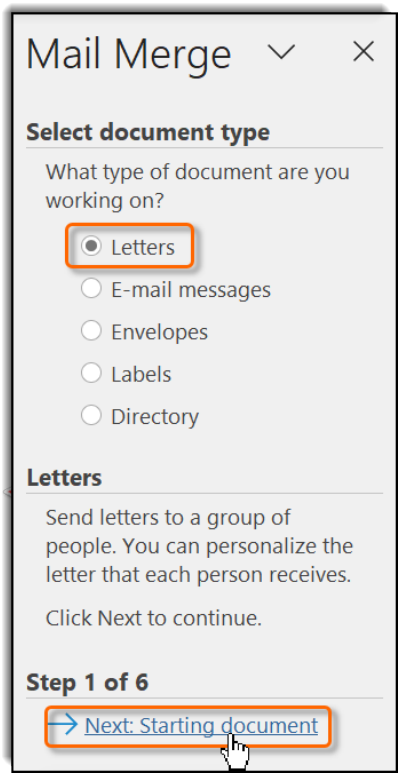
Using the Mail Merge Wizard

To get started using the **Mail Merge Wizard**, pen a new Microsoft Word document. Then, on the **Mailings** tab in the **Start Mail Merge** group, click **Start Mail Merge** and select **Step-by-Step Mail Merge Wizard**:



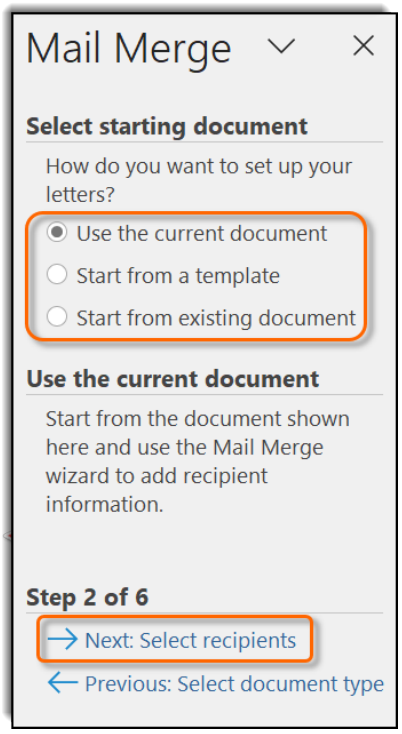
1. In step 1 of the Mail Merge Wizard, select your document type. In this demo we will select **Letters**. Click **Next: Starting document**:

EVALUATION COPY: Not to be used in class.



2. In step 2, select the starting document. In this demo we will use the current (blank) document. Select **Use the current document** and then click **Next: Select recipients**:

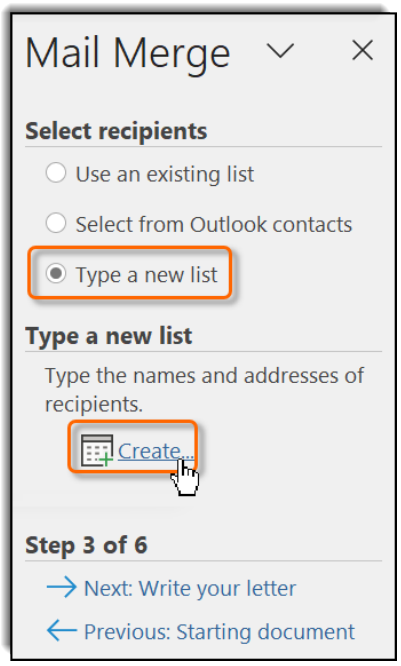
EVALUATION COPY: Not to be used in class.



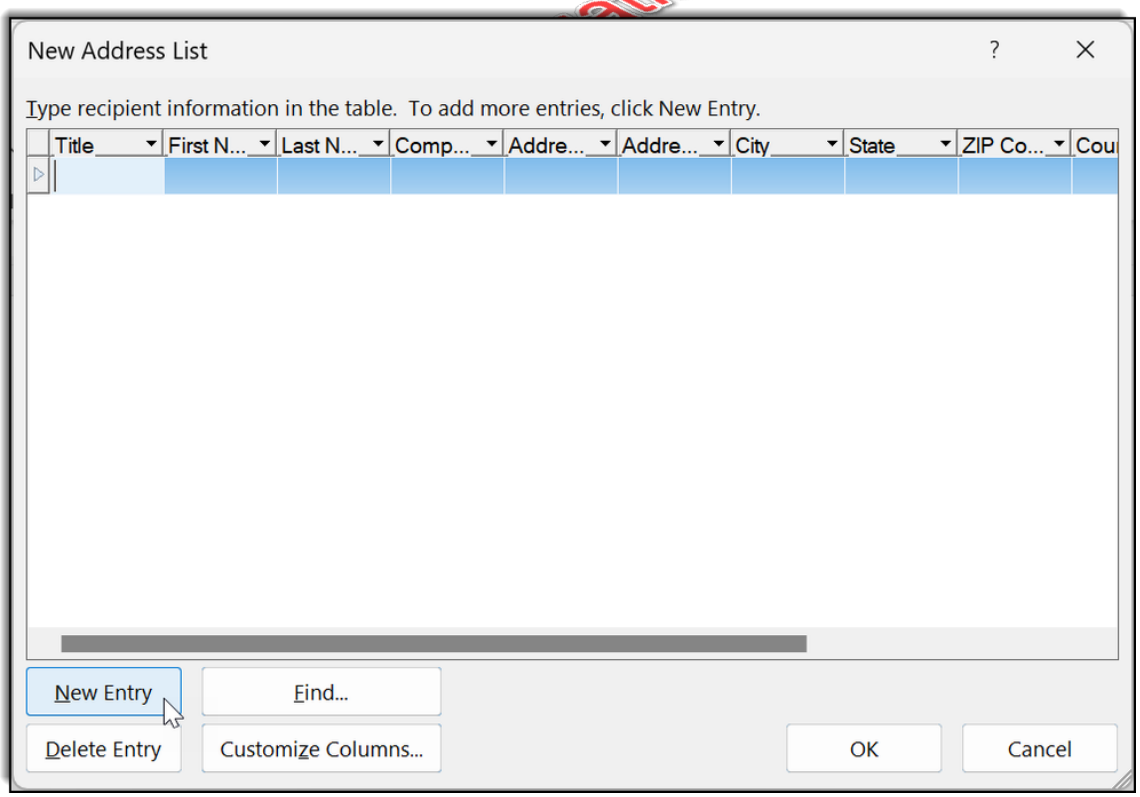
A. Note that selecting **Start from existing document** (which we are not doing in this demo) changes the view and gives you the option to choose your document. After you choose it, the **Mail Merge Wizard** reverts to **Use the current document**.

3. In step 3, select recipients. In this demo we will create a new list, so select **Type a new list** and then click **Create**:

EVALUATION COPY: Not to be used in class.

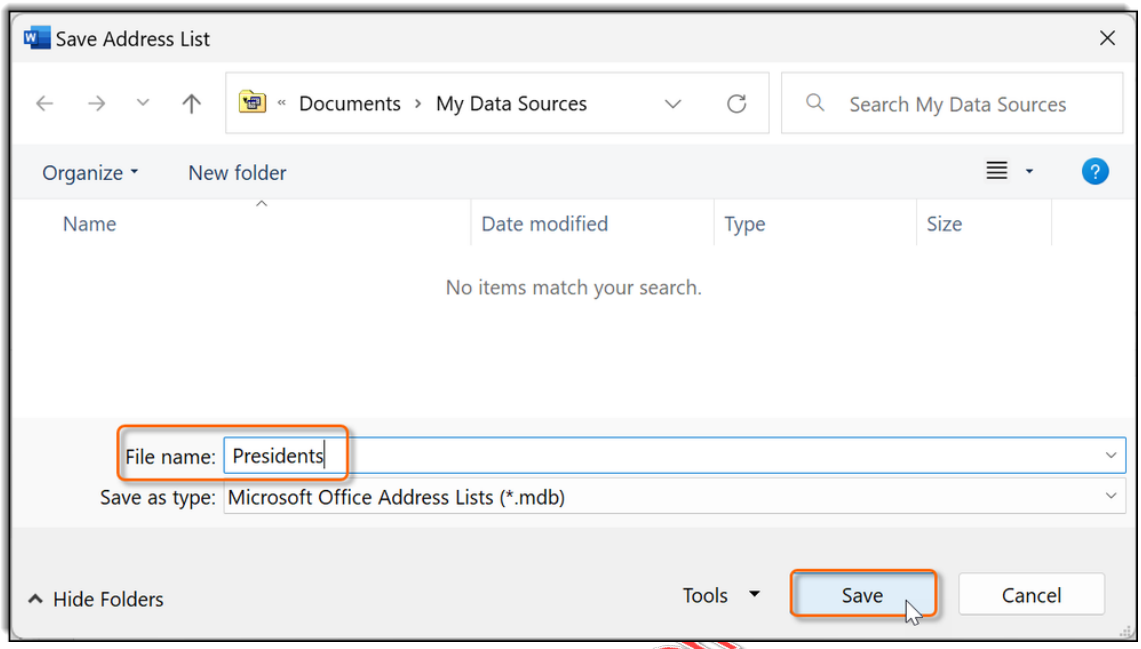


A. Create a list by adding data in the **New Address List** dialog and clicking **OK**:

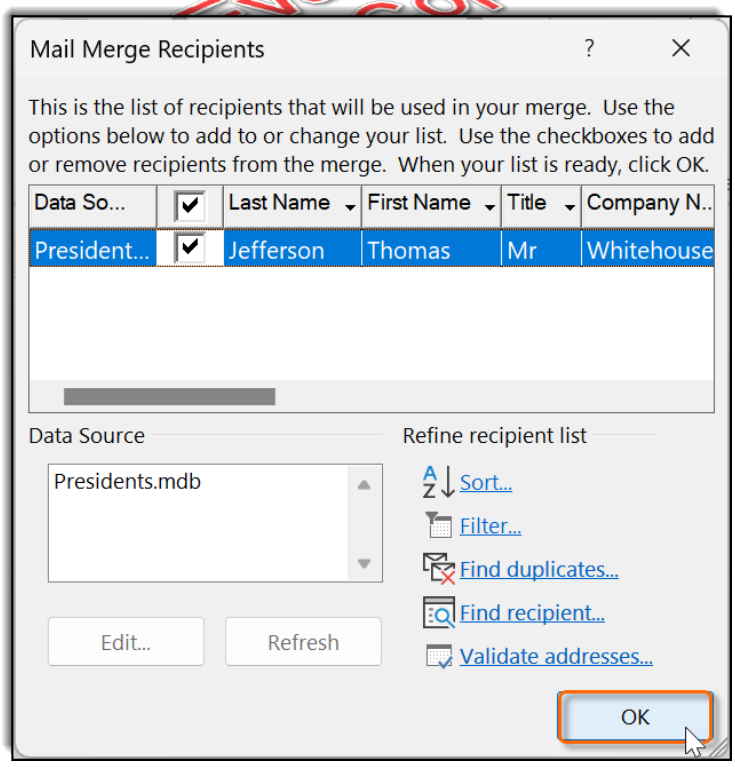


EVALUATION COPY: Not to be used in class.

B. Save the list by giving it a name, accepting the default location, then clicking **Save** in the **Save Address List** dialog:

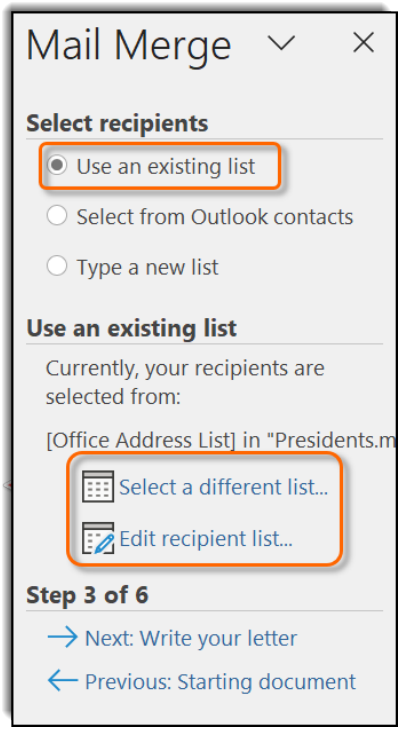


C. Click **OK** in the **Mail Merge Recipients** dialog:



EVALUATION COPY: Not to be used in class.

D. Note that now that we have created a list, the **Mail Merge Wizard** reverts to **Use an existing list** and we have the option to edit the recipient list or to select a different list:



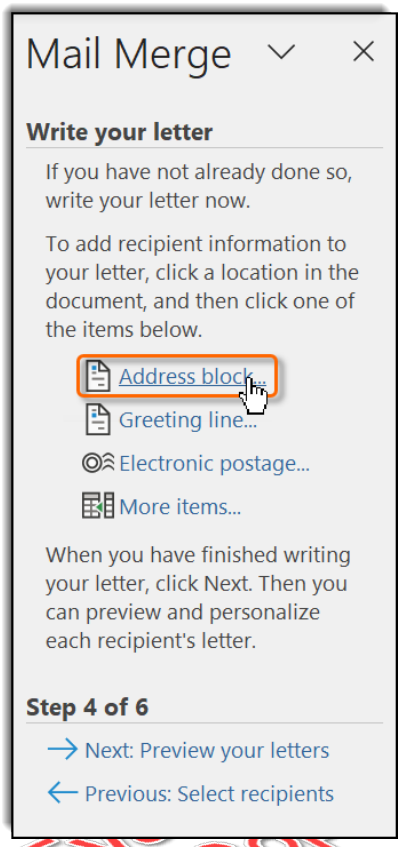
E. Selecting **Edit recipient list** opens up the **Mail Merge Recipients** dialog box, where we can edit the list and select or deselect records.

F. Click the **Next: Write your letter** link.

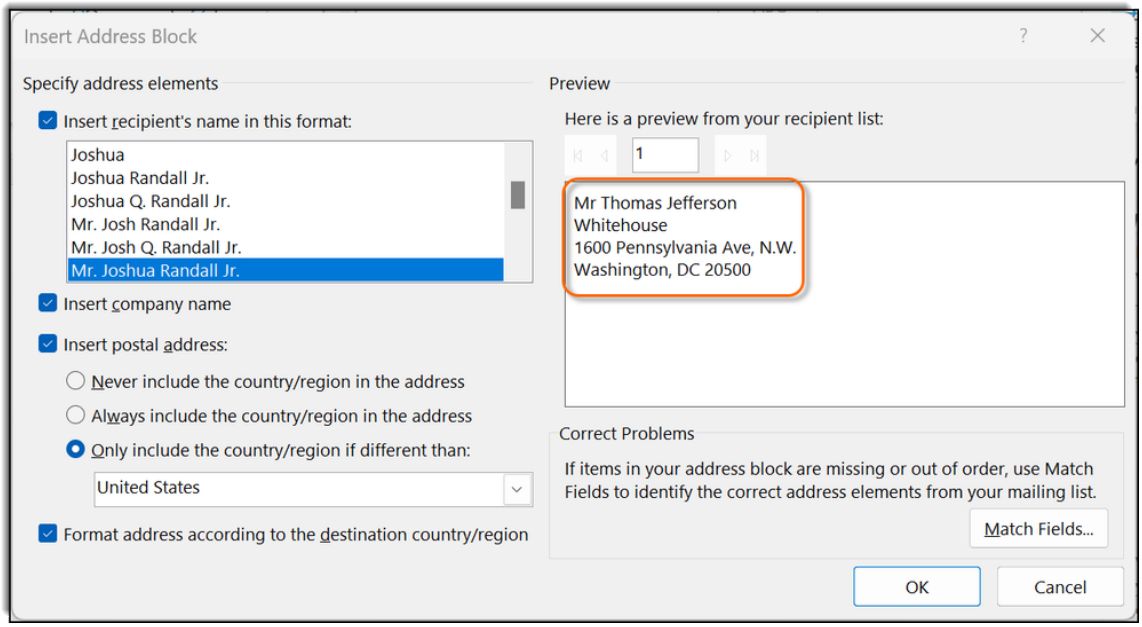
4. In step 4, we write the letter and add custom fields:

A. Click **Address block** to add the recipient's addresses at the top of the document:

EVALUATION COPY: Not to be used in class.

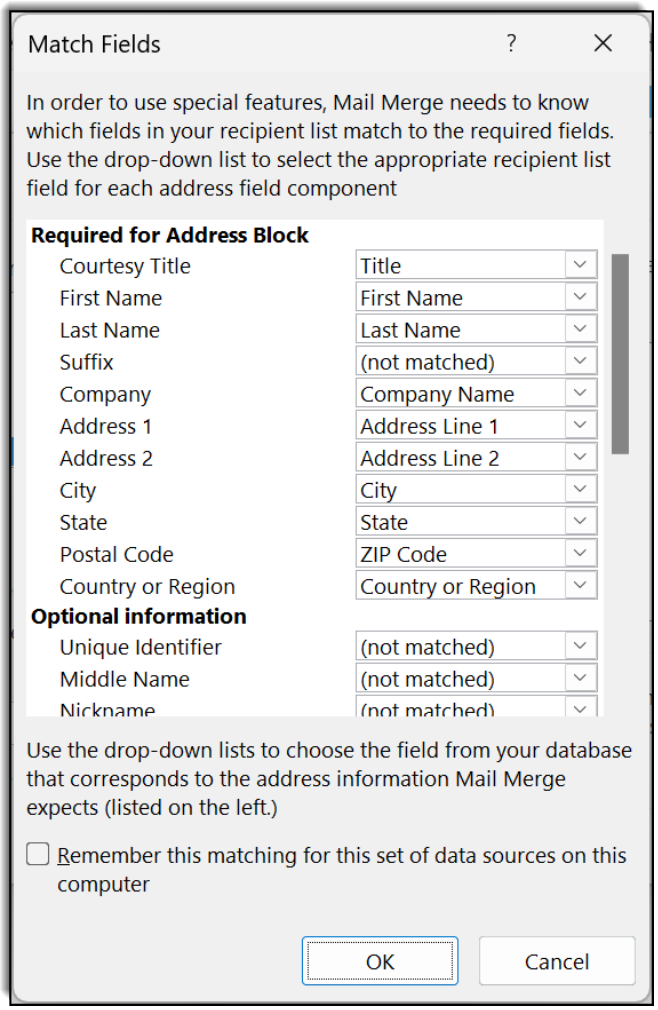


B. In the **Insert Address Block** dialog box, check or uncheck boxes and select options on the left until the address appears the way you want it to:



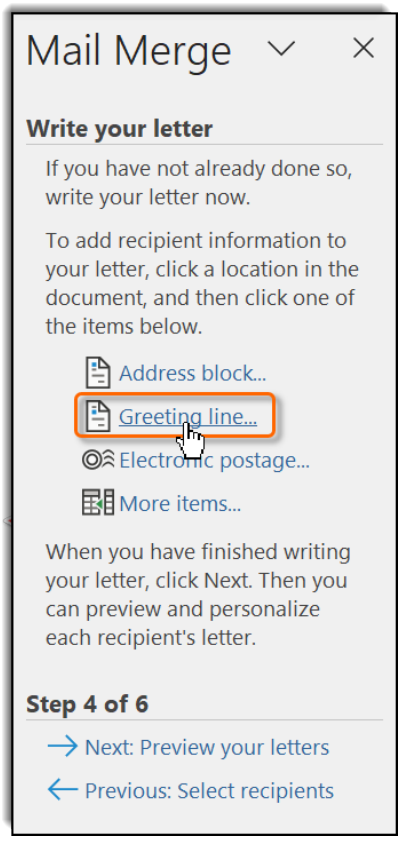
EVALUATION COPY: Not to be used in class.

i. Note that you can use **Match Fields** to correct any problems. Clicking **Match Fields** opens up the **Match Fields** dialog box, in which you can associate the fields from your list with the fields required by the wizard:



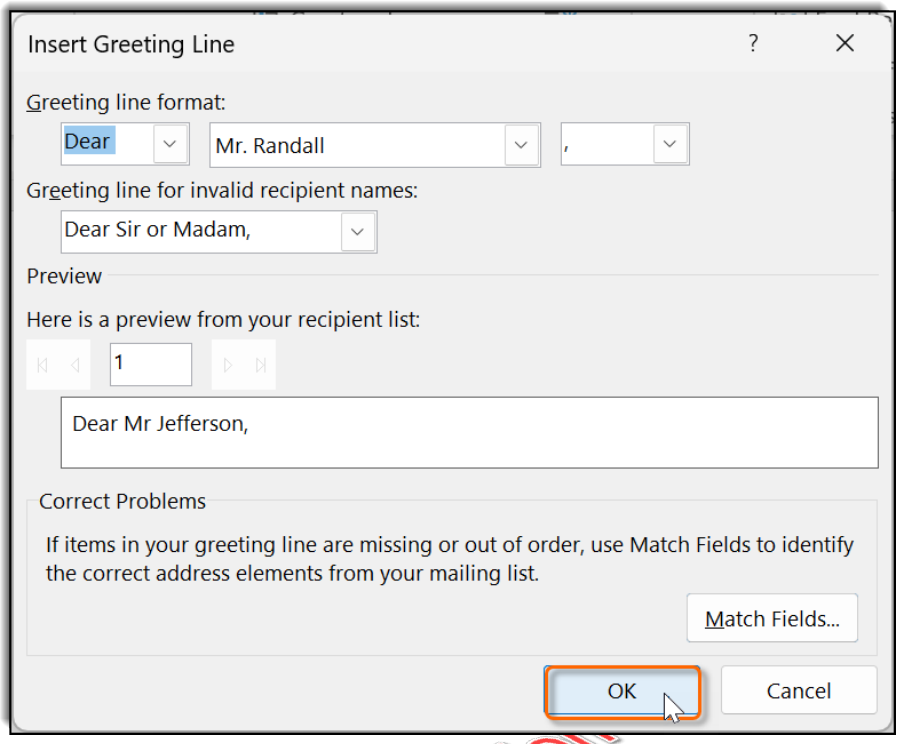
C. Press **Enter** on your keyboard and click **Greeting line…** to enter a greeting:

EVALUATION COPY: Not to be used in class.



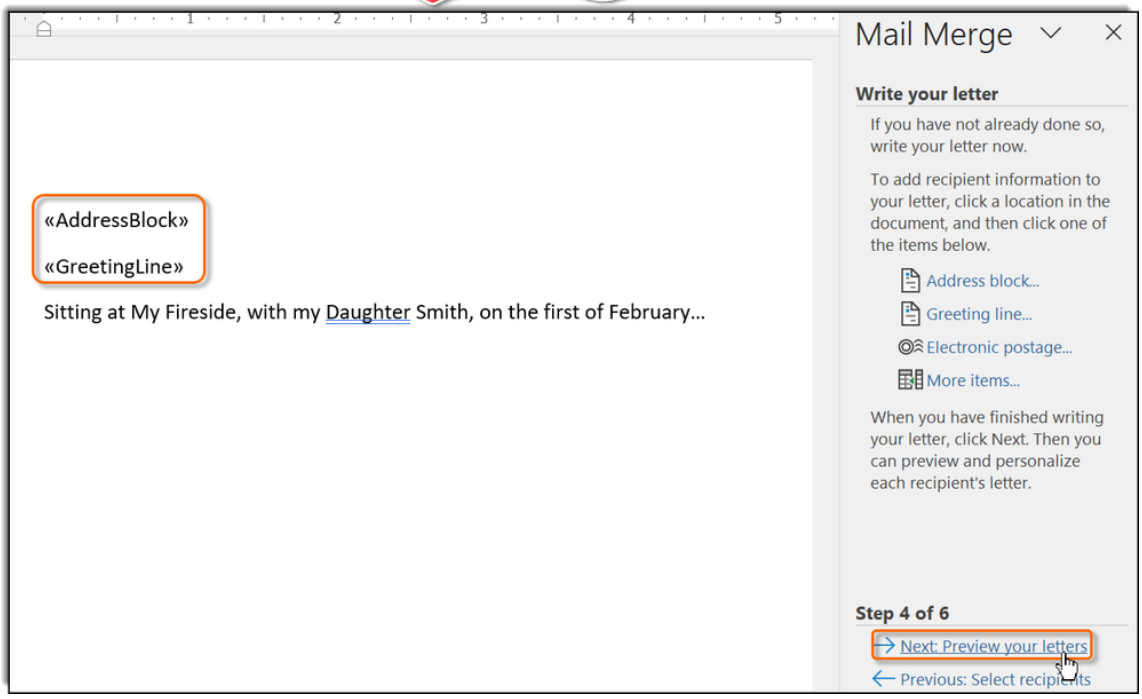
D. In the **Insert Greeting Line** dialog box, choose the greeting line format by clicking the drop-down arrows and selecting the options of your choice. Then, click **OK**:

EVALUATION COPY: Not to be used in class.



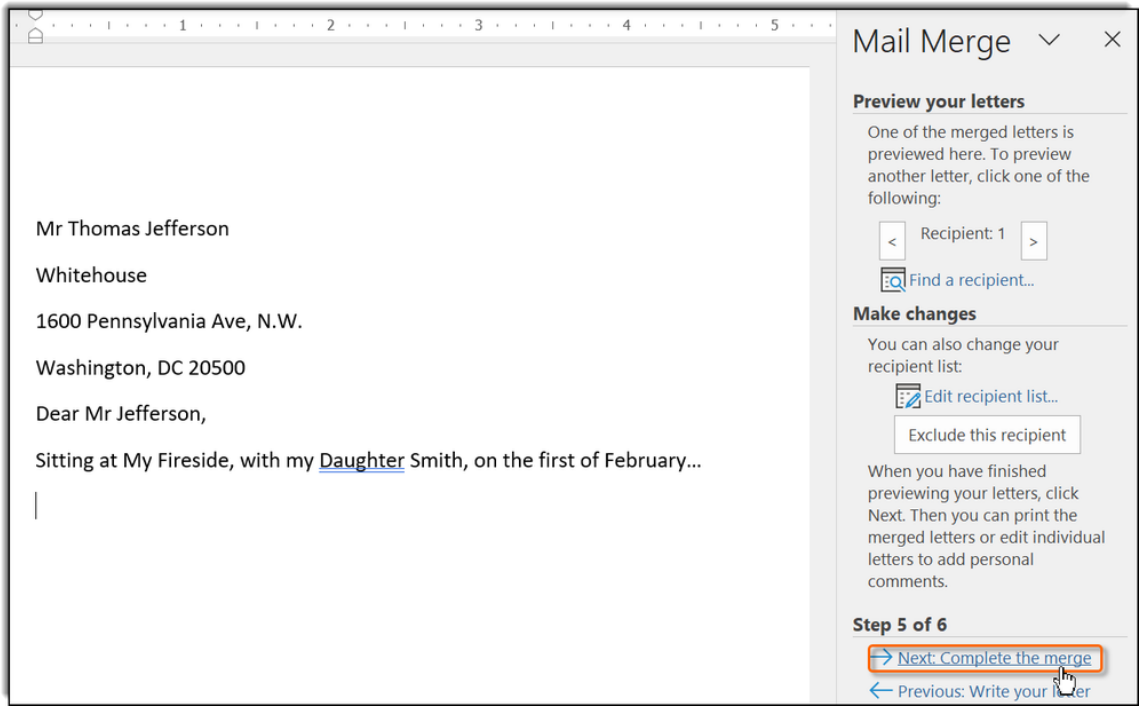
E. Note that the address block and greeting line are surrounded by chevrons. Write a short letter and click **Next: Preview your letters**:

Evaluation Copy



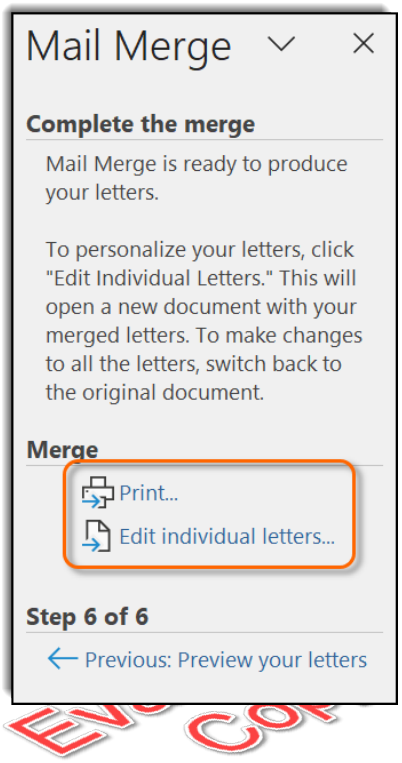
EVALUATION COPY: Not to be used in class.

5. In step 5, preview your letter and click **Next: Complete the merge**:



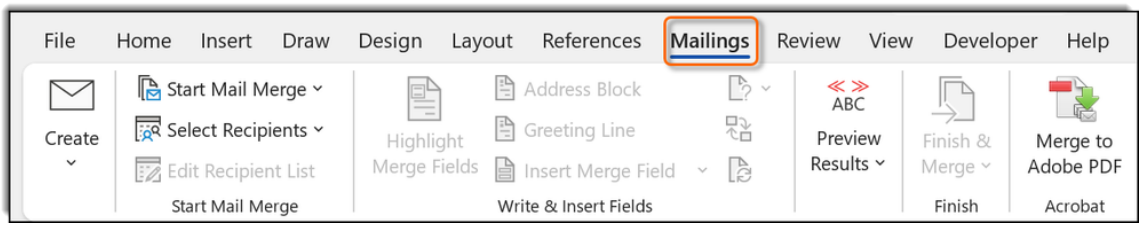
6. In step 6, click **Print** to print your letters or **Edit individual letters** to further personalize some or all of the letters:

EVALUATION COPY: Not to be used in class.



Using the Mail Merge Commands

Open a new blank document and click the **Mailings** tab and you will notice that most of the commands are greyed out:



This is because you cannot use them until after you have created or selected a set of recipients. After doing so, the commands become available. Go back to the document in which you created the mail merge and you will see that the commands are available.

EVALUATION COPY: Not to be used in class.

Exercise 18: Using Mail Merge

15 to 25 minutes

In this exercise, you will use the Mail Merge feature.

1. Navigate to the `word365-mailings/Exercises` folder and open `ArtistLetter.docx`.
2. Use the Mail Merge Wizard to create letters that look like the following:

```
Dave Dunn
1977 Rock Lane
Recordville, NY 12345

March 25, 2023

Bruce Springsteen
14 Main St.
Badlands, NJ 98765

Dear Bruce,

I have been listening to your albums for over 30 years and just wanted
to write a quick note to let you know how much I appreciate your music.
I especially like Greetings from Asbury Park. Anyway, thanks for all the
good times. Listening to your music has made my life more fun!

Sincerely,



Dave
```

Evaluation Copy

3. Things to note and hints:
    A. You will use an existing list named `Artists.xlsx` and located in the `word365-mailings/Exercises` folder.
    B. Three pieces of recipient information need to be added to the document in place of existing text:
        i. Replace "Artist Address" with an **Address Block**. You will need to click **Match Fields** to correct the address block.
        ii. Replace "Dear First Name," with a **Greeting Line**.

EVALUATION COPY: Not to be used in class.

iii. Replace "ALBUM" with **Favorite Album** (you will have to click **More items** to find **Favorite Album**).

Conclusion

Evaluation Copy

In this lesson, you have learned to create envelopes and labels in Microsoft Word and to use the **Mail Merge Wizard** and commands to create form letters customized for the individual recipients.

EVALUATION COPY: Not to be used in class.

LESSON 6
Protecting Documents

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Marking documents final and making them read only.

☑ Password protection.

☑ Restricting formatting options.

☑ Restricting editing options.

Introduction

Evaluation Copy

In this lesson, you will learn to mark documents as final and make them read only, to password protect Microsoft Word documents, and to restrict formatting and editing options before sharing a document with others.

EVALUATION COPY: Not to be used in class.

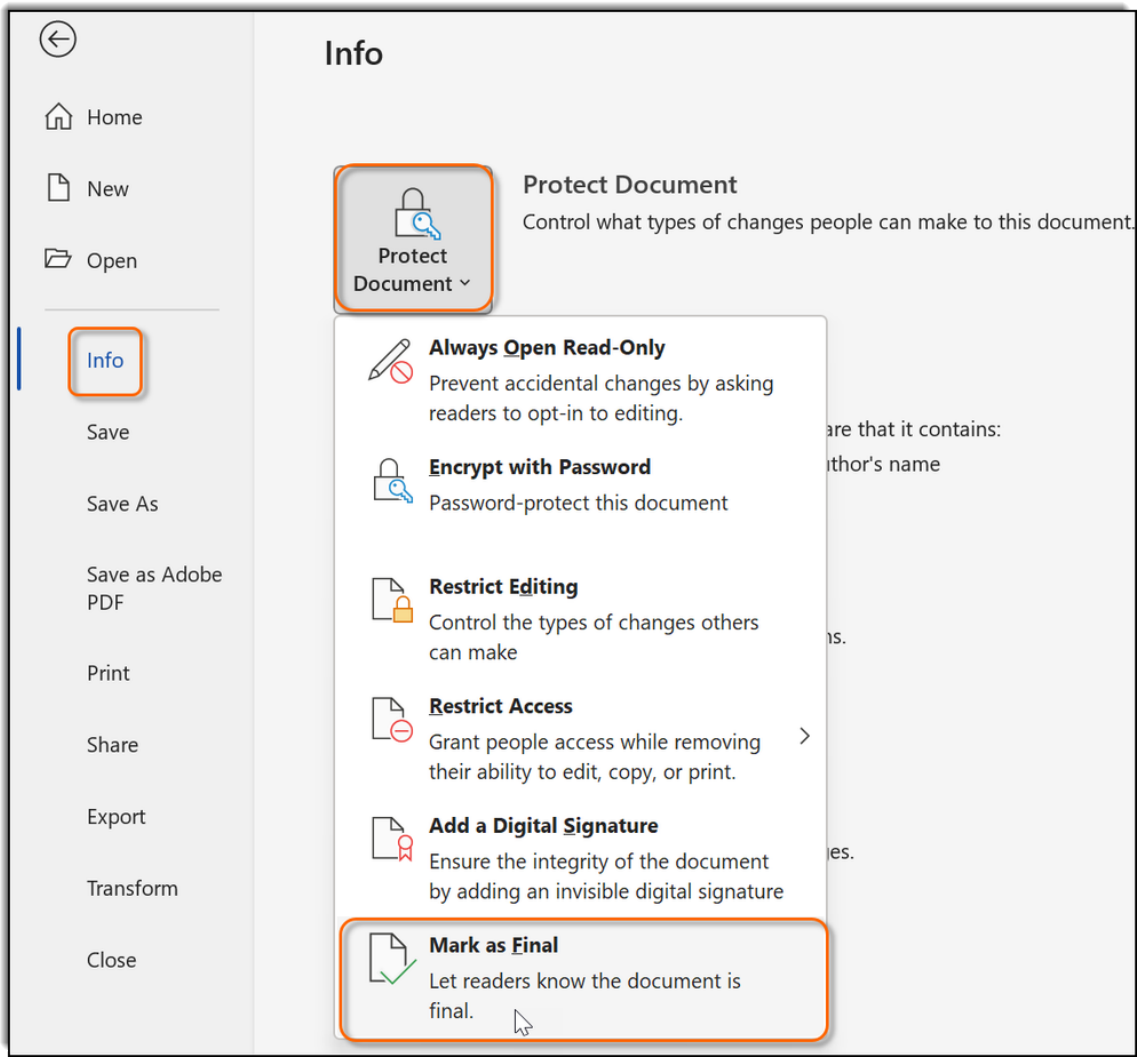
6.1. Marking Documents Final

It is sometimes desirable to let readers know a document is final so they won't edit the document. The simplest way to do this is to mark the document as final.

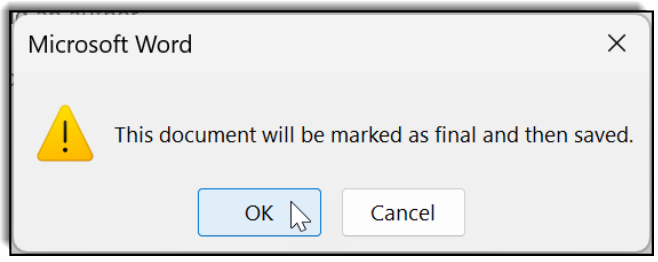
To mark a Microsoft Word document as final:

1. From the **Info** tab of Backstage view, click **Protect Document** and select **Mark as Final**:

EVALUATION COPY: Not to be used in class.

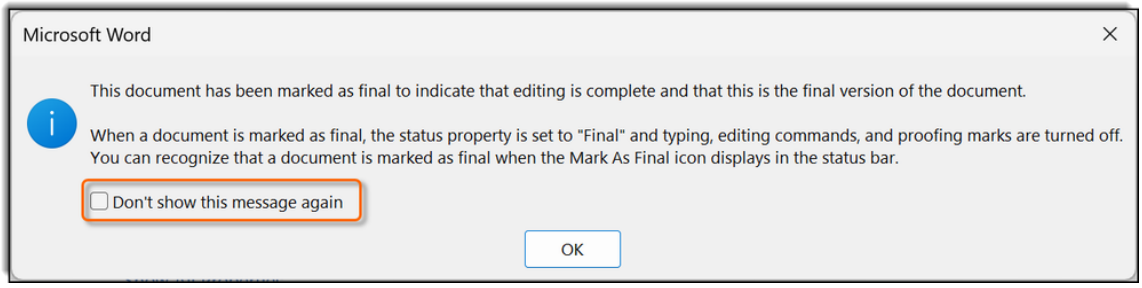


2. In the dialog box that appears, click **OK**:



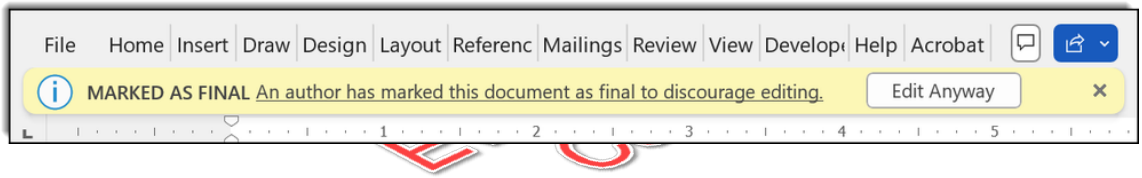
3. If a second dialog box appears, click **OK**:

EVALUATION COPY: Not to be used in class.



You can also check the **Don't show this message again** box if you do not want that dialog to come up every time you mark a document as final.

Note that the document is now clearly marked as final, but that readers may still edit the document by clicking **Edit Anyway**:



We will cover actually preventing readers from editing a document later in this lesson.

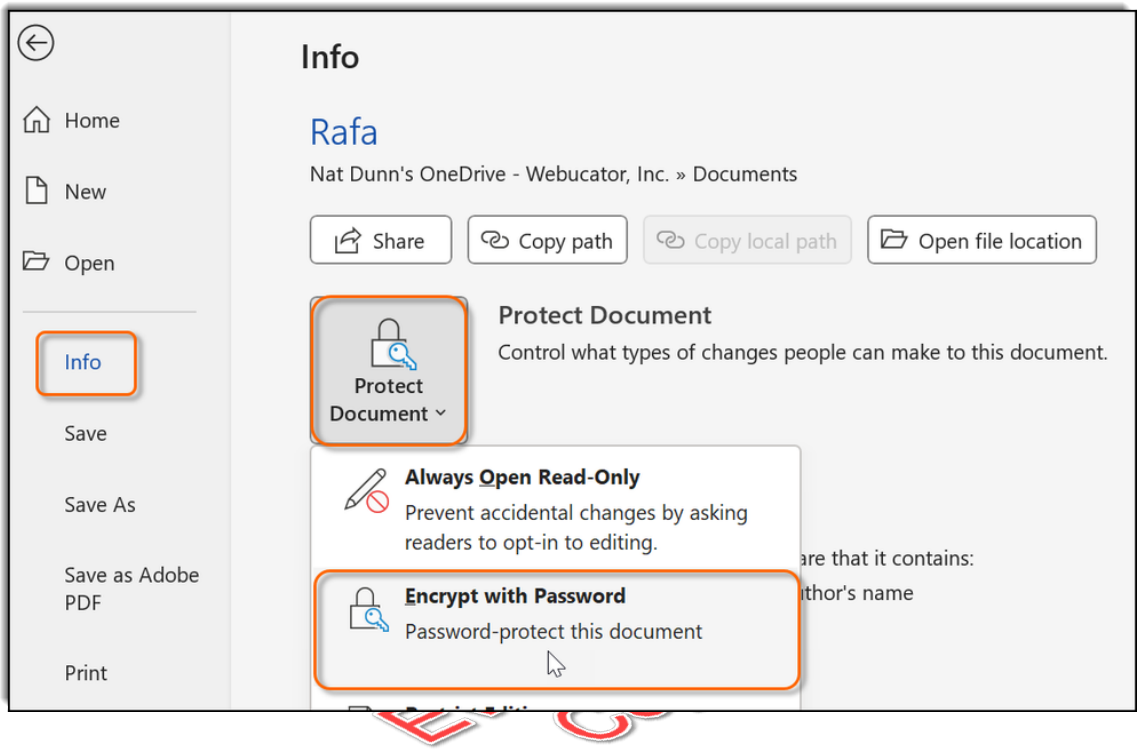
EVALUATION COPY: Not to be used in class.

6.2. Password Protect Word Documents

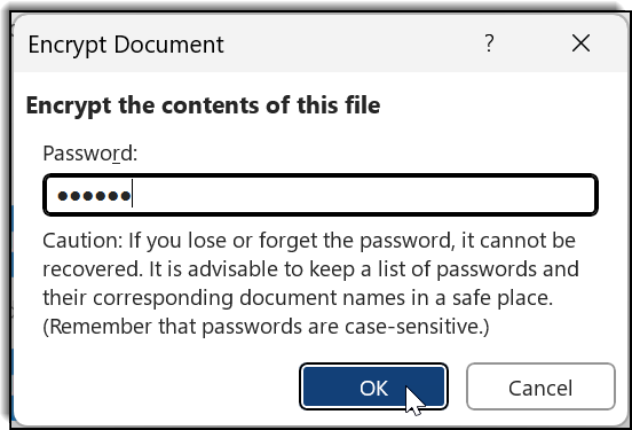
To password protect Microsoft Word documents to prevent others from opening them:

1. From the **Info** tab of Backstage view, click **Protect Document** and select **Encrypt with Password**:

EVALUATION COPY: Not to be used in class.

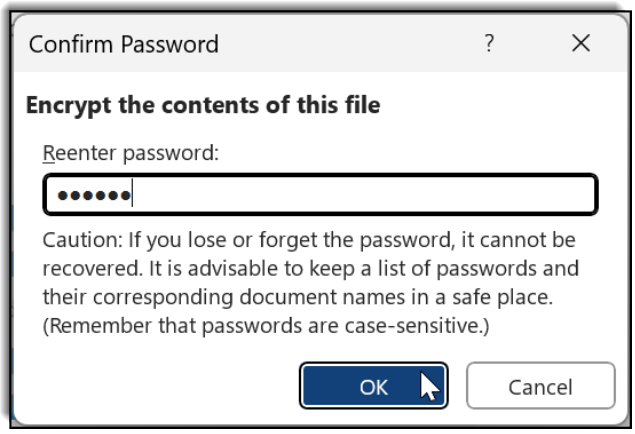


2. In the **Encrypt Document** dialog box, enter your password and click **OK**:



3. In the **Confirm Password** dialog box, reenter your password and click **OK**:

EVALUATION COPY: Not to be used in class.



4. Save your document.

To remove or change your password, simply follow the steps above and either remove your password or enter a new password.

Evaluation Copy

EVALUATION COPY: Not to be used in class.

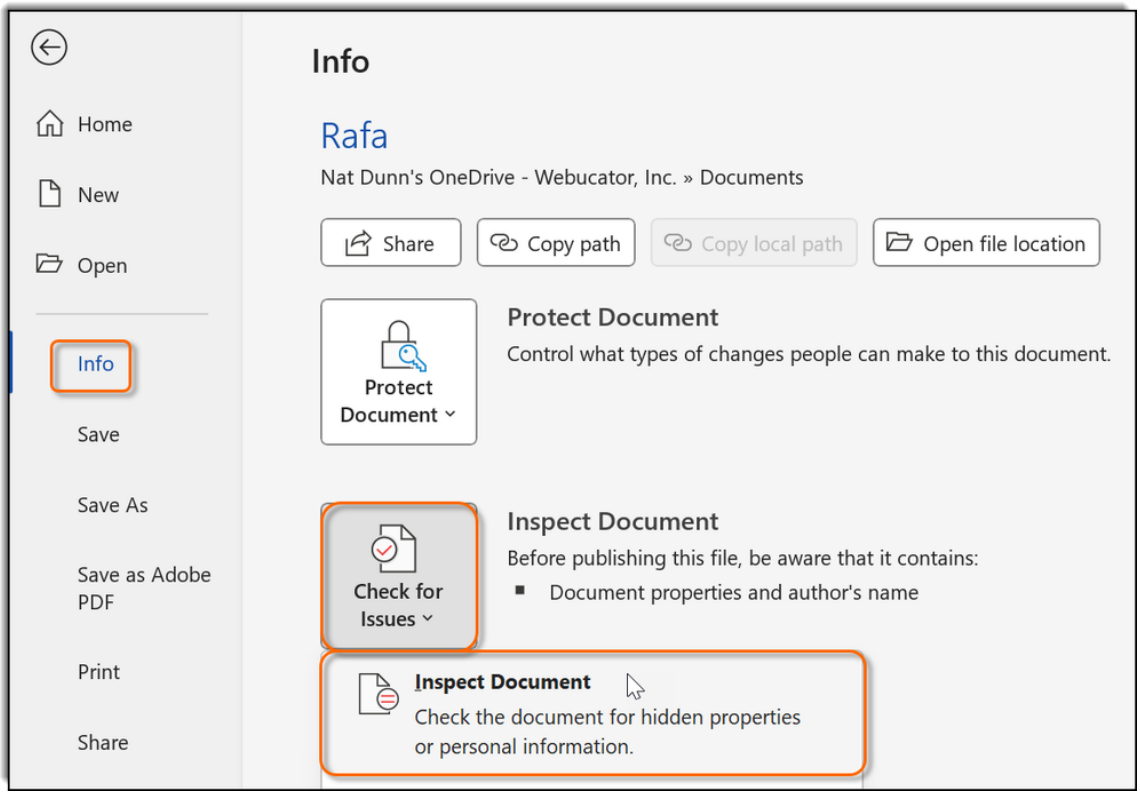
6.3. Removing Metadata from Files

When sharing documents, you may wish to remove document metadata, which may contain hidden or personal data.

To remove document metadata:

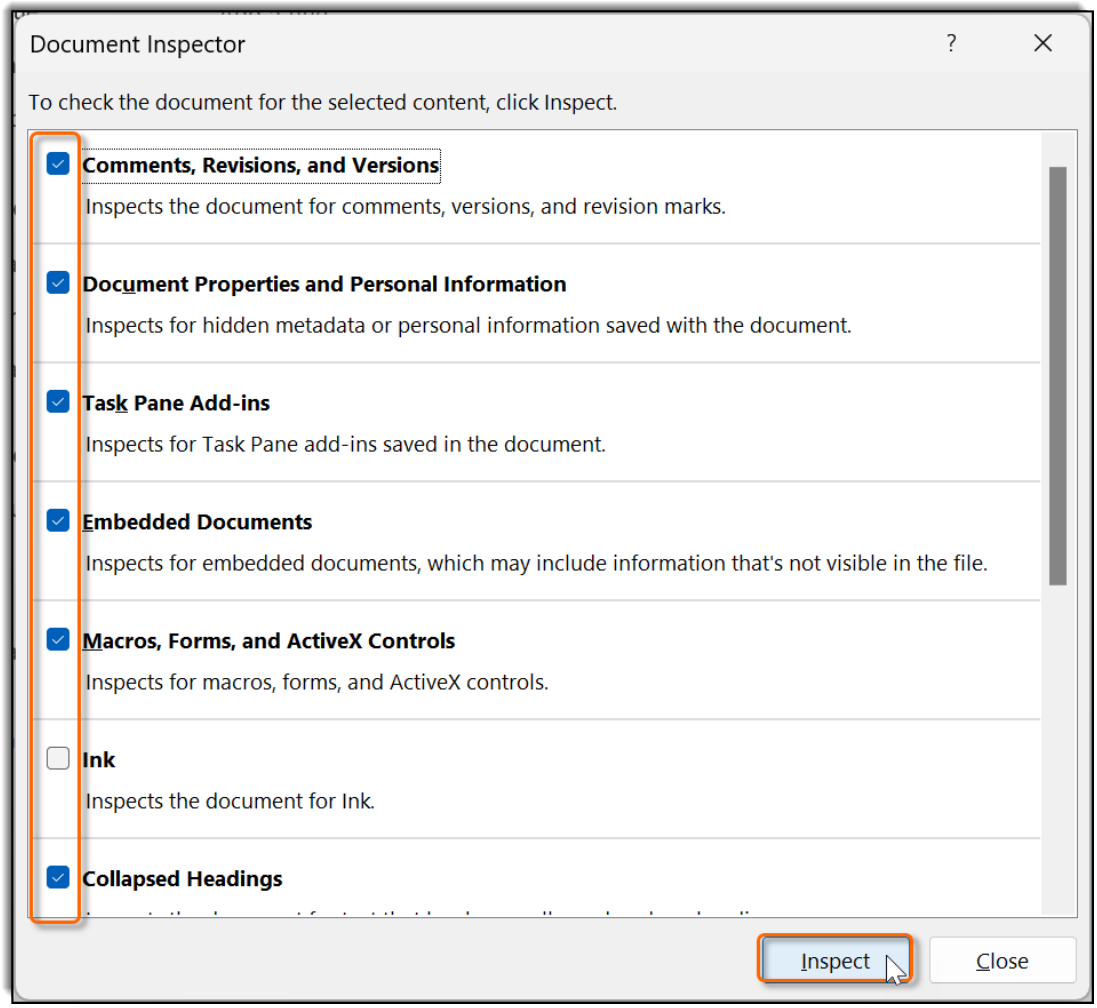
1. From the **Info** tab of Backstage view, click **Check for Issues** and select **Inspect Document**:

EVALUATION COPY: Not to be used in class.



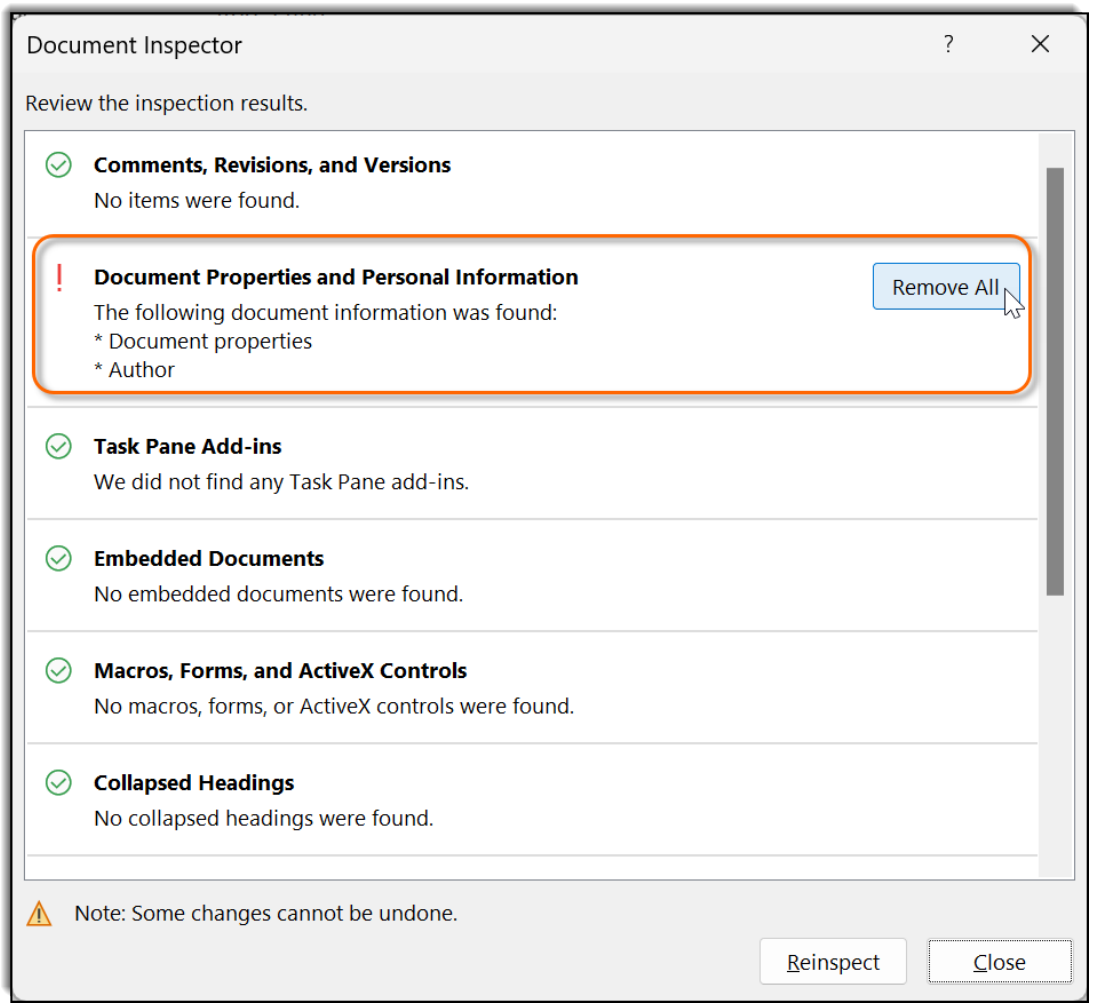
2. In the **Document Inspector** dialog box, check the boxes to inspect for certain data, and then click **Inspect**:

EVALUATION COPY: Not to be used in class.



3. In the results, select **Remove All** to remove any found data:

EVALUATION COPY: Not to be used in class.



EVALUATION COPY: Not to be used in class.

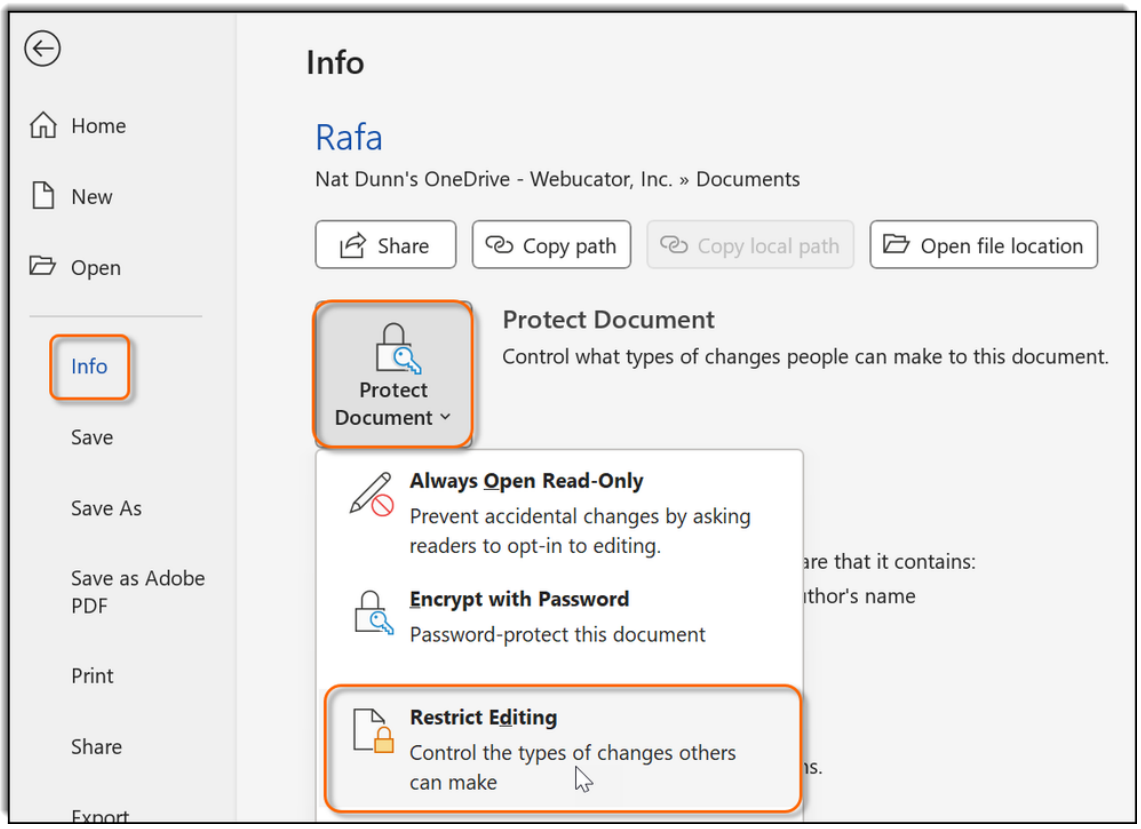
6.4. Restrict Formatting and Editing

Sometimes when collaborating on a document, you might wish to let people make certain types of changes, but not other types of changes. In this case, you can restrict the editing and formatting options before sharing the document with others.

To restrict formatting and editing options:

EVALUATION COPY: Not to be used in class.

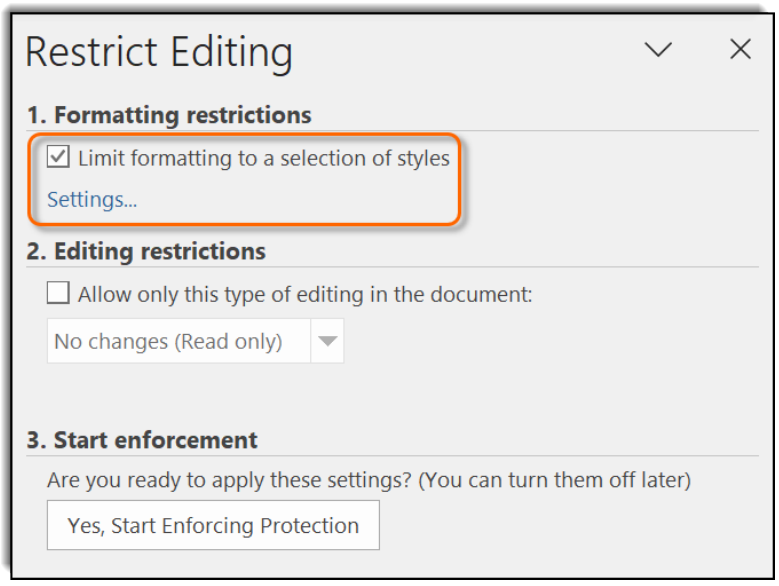
1. From the **Info** tab of Backstage view, click **Protect Document** and select **Restrict Editing** to open the **Restrict Editing** pane:



2. To set formatting restrictions:

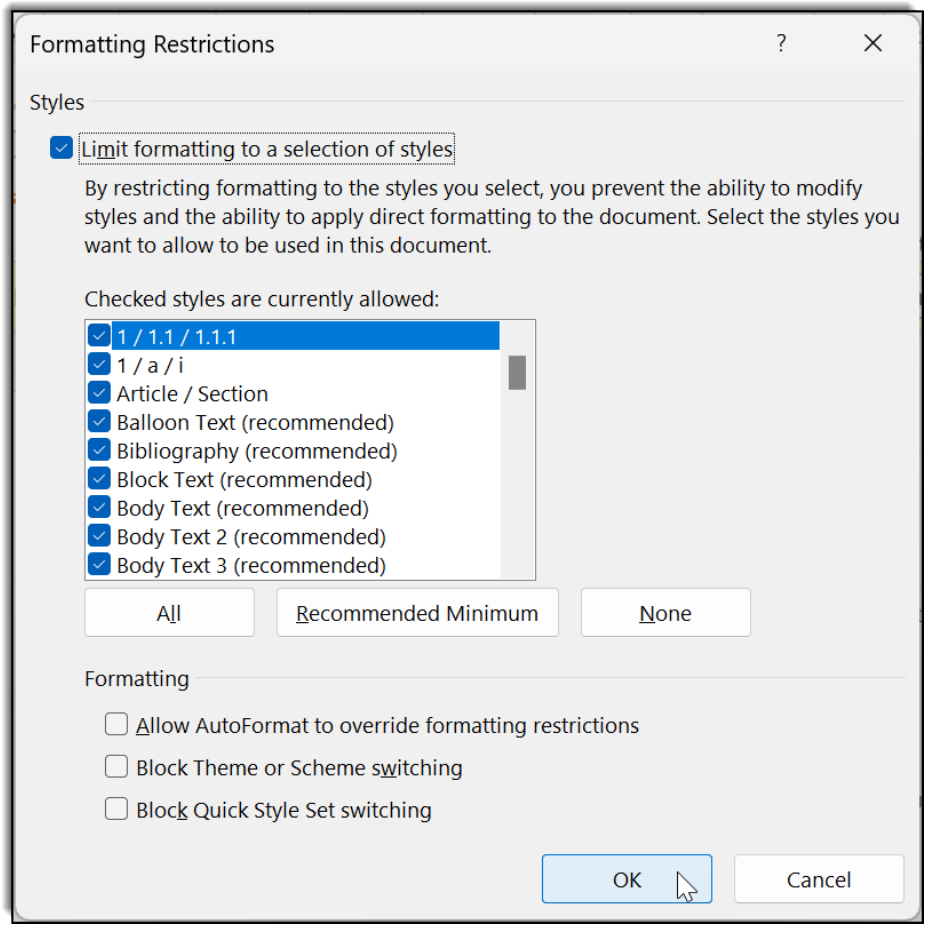
    A. In the **Restrict Editing** pane, check **Limit formatting to a selection of styles** and click **Settings**:

EVALUATION COPY: Not to be used in class.

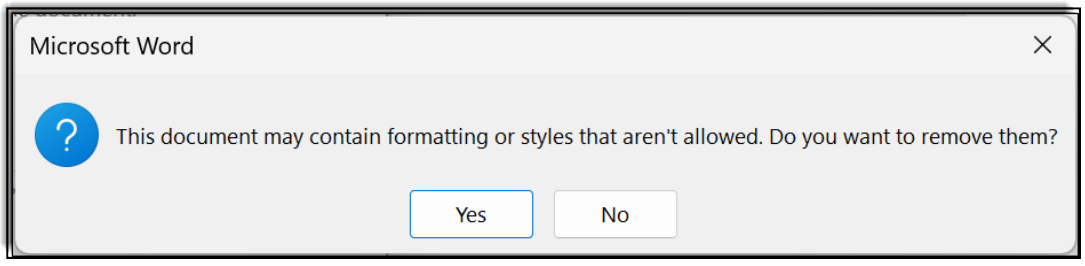


B. Select or deselect styles according to the restrictions you wish to place and click **OK**:

EVALUATION COPY: Not to be used in class.



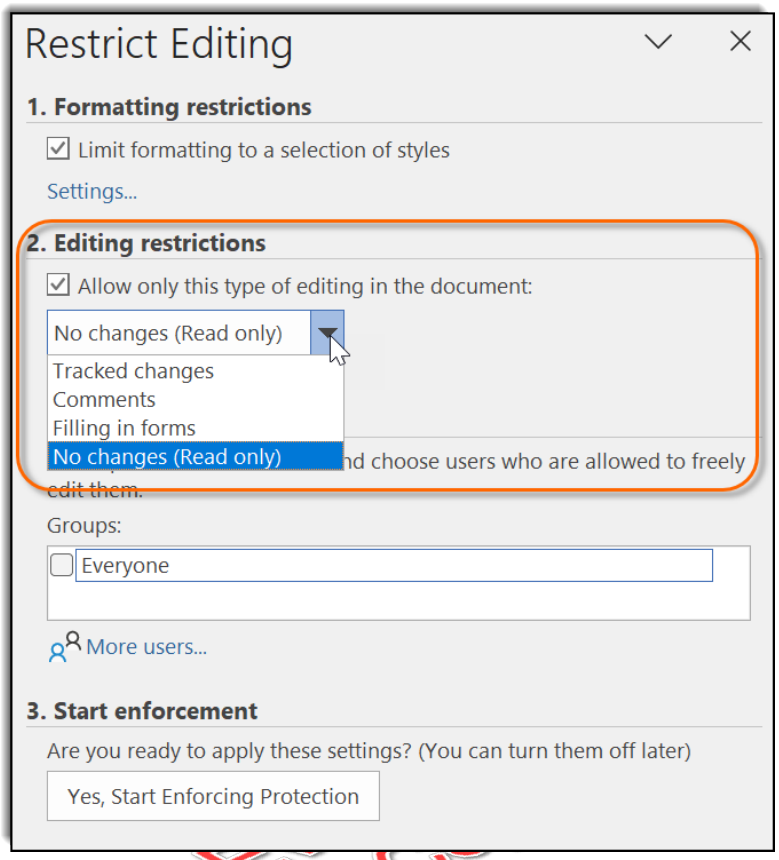
C. In the dialog box that appears, choose to keep or remove styles currently in the document which you are not allowing going forward:



3. To set editing restrictions:

A. Check **Allow only this type of editing in the document** and select the editing restrictions you wish to apply from the dropdown menu:

EVALUATION COPY: Not to be used in class.



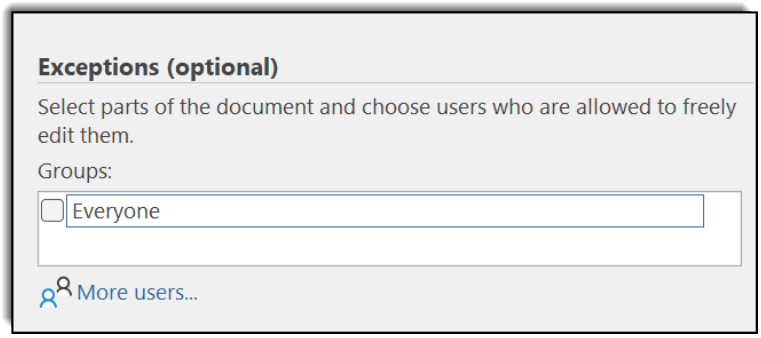
i. **No changes (read only)** – Prevent readers from making any changes to the document.

ii. **Tracked changes** – Allow changes, but require them to be tracked.

iii. **Comments** – Prevent changes but allow comments.

iv. **Filling in forms** – Allow readers to fill in forms, but not to make any other changes.

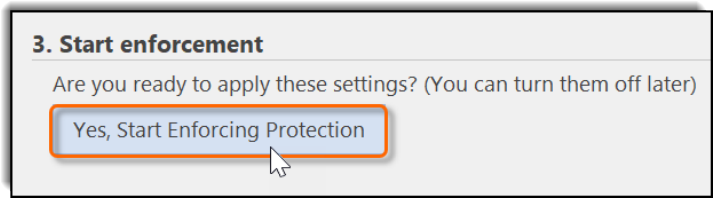
B. Note that you can make exceptions to whom the editing restrictions apply:



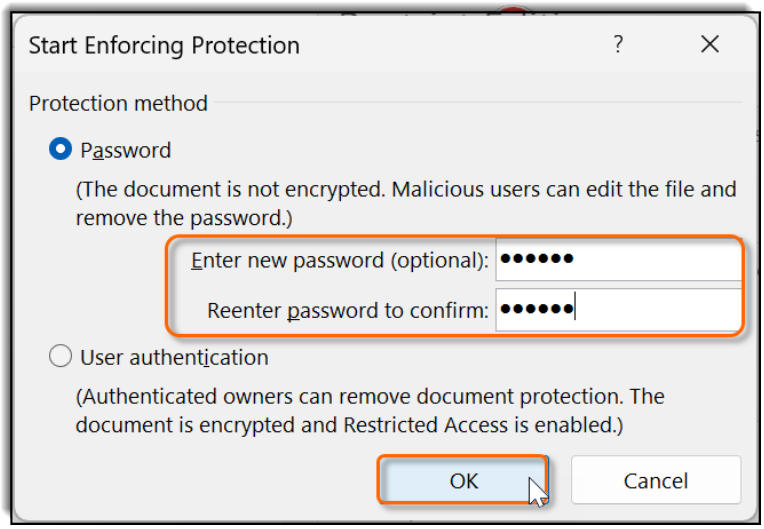
EVALUATION COPY: Not to be used in class.

4. To start enforcing the formatting and editing restrictions you have set:

   A. Click **Yes, Start Enforcing Protection**:



   B. In the dialog box that appears, enter and confirm your password and click **OK**:



EVALUATION COPY: Not to be used in class.

Exercise 19: Protecting a Document

10 to 20 minutes

In this exercise, you will mark a document as final to discourage others from editing it, password protect a document to prevent others from editing it except to leave comments, and then password protect a document to prevent others from opening it.

1. Navigate to the `word365-protecting/Exercises` folder and open `PlantsInMyYard.docx`.
2. Mark the document as final to discourage others from editing it.
3. Prevent, rather than discourage, others from editing the document by password protecting it with the password "password". Do allow reviewers to add comments.
4. Password protect the document to prevent others from opening it.
5. Remove the password and close the document.

EVALUATION COPY: Not to be used in class.

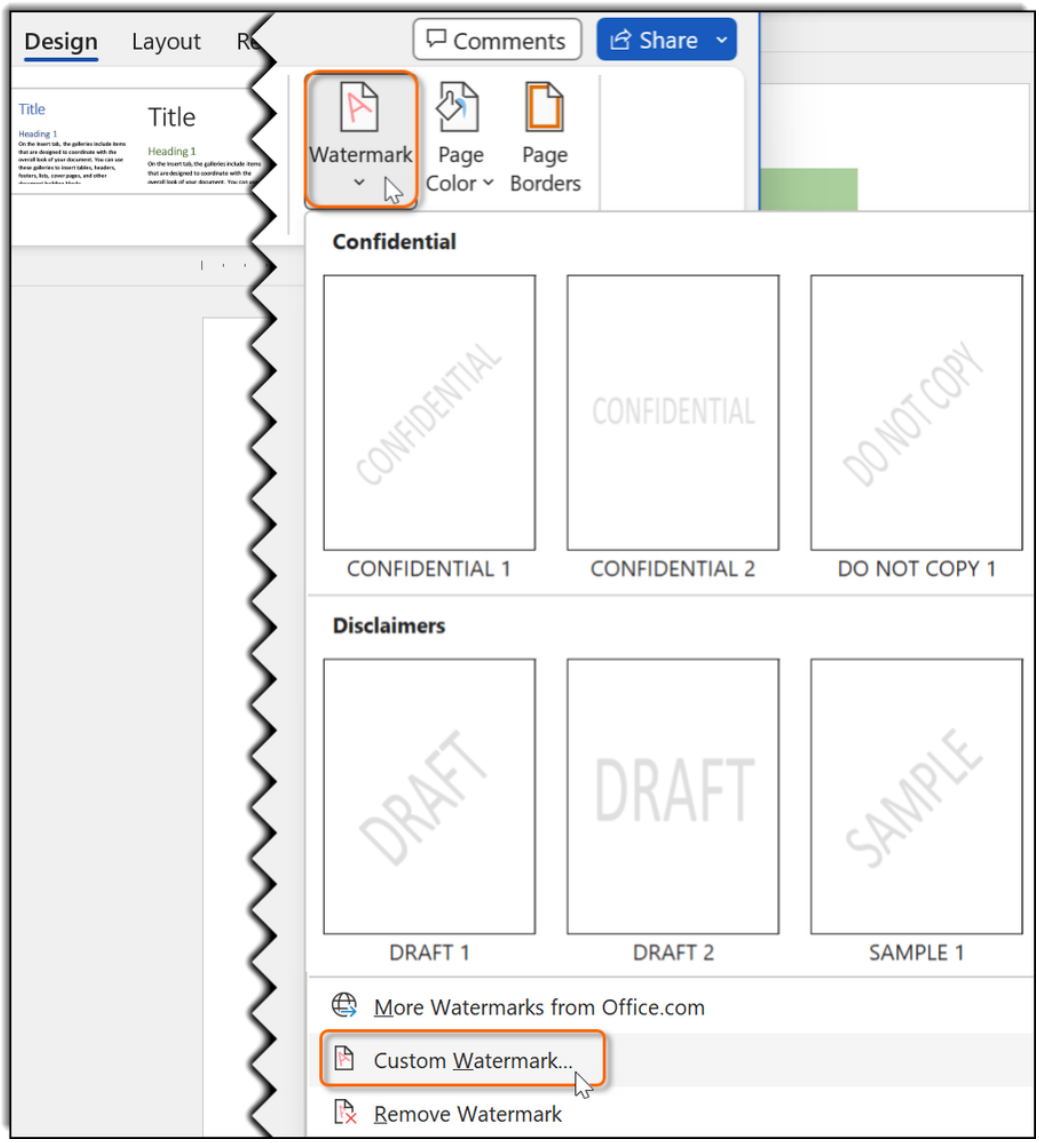
6.5. Adding Watermarks

Watermarks are greyed out text or images which show up in the background of a document. Common uses of watermarks are:

1. To mark documents as drafts.
2. To mark documents as confidential.
3. To insert a logo in the background of a document.

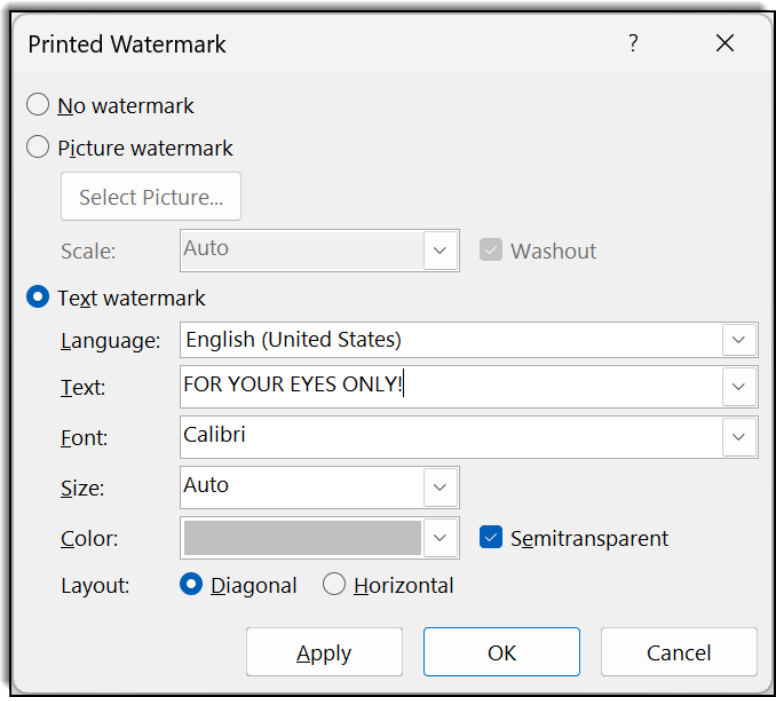
To add a standard watermark to a document: On the **Design** tab in the **Page Background** group, click **Watermark** and select a watermark:

EVALUATION COPY: Not to be used in class.



To add a custom watermark to a document, click **Custom Watermark** at the bottom of the **Watermark** dropdown. In the **Printed Watermark** dialog box, select either **Picture watermark** or **Text watermark**, and then select your picture or enter your text and click **OK**:

EVALUATION COPY: Not to be used in class.



The resulting watermark will looks something like this:

EVALUATION COPY: Not to be used in class.

EVALUATION COPY: Not to be used in class.

Exercise 20: Adding Custom Watermarks

5 to 10 minutes

In this exercise, you will add a custom watermark to a document.

1. Open a new document.
2. Add a text watermark with the words "VERY ROUGH DRAFT."
3. Change the watermark to a picture watermark using any picture you like. If you like, you can use the `mission-critical.jpg` file in `word365-protecting-docs/images` folder.

Evaluation Copy

Conclusion

In this lesson, you learned to mark documents as final thereby making them read only, to password protect Microsoft Word documents, and to restrict formatting and editing options before sharing a document with others.

EVALUATION COPY: Not to be used in class.

LESSON 7
Macros

EVALUATION COPY: Not to be used in class.

Topics Covered

☑ Macros.

Introduction

In this lesson, you will learn to use Macros in Microsoft Word.

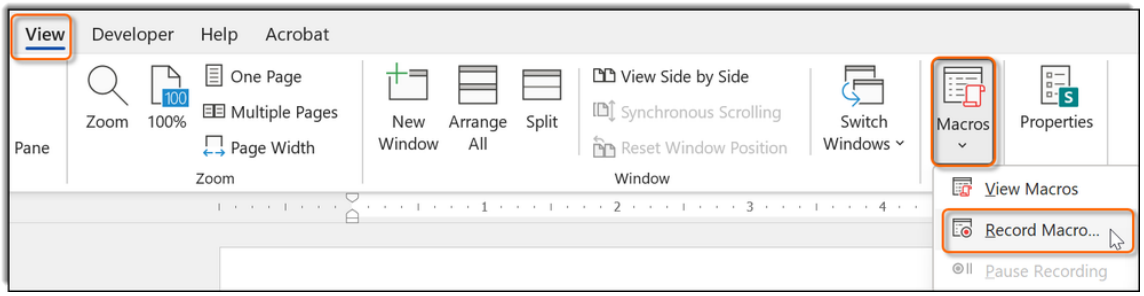
EVALUATION COPY: Not to be used in class.

7.1. Using Macros

You can create macros in Word to help streamline your work processes. Macros are a way to group a bunch of tasks and automate them.

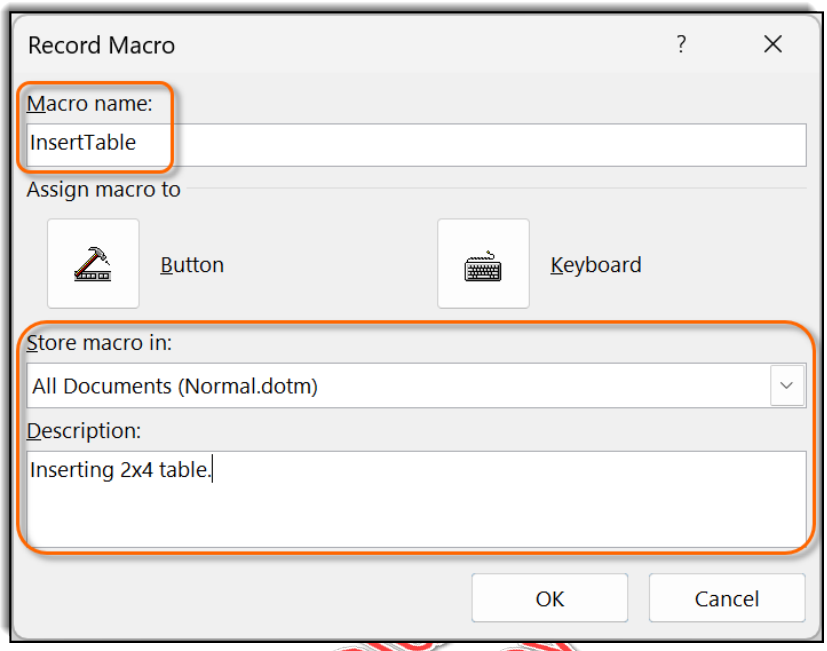
To record a simple macro with a keyboard shortcut:

1. From the **View** tab of the Ribbon, in the **Macros** group, click **Macros** and select **Record Macro**:



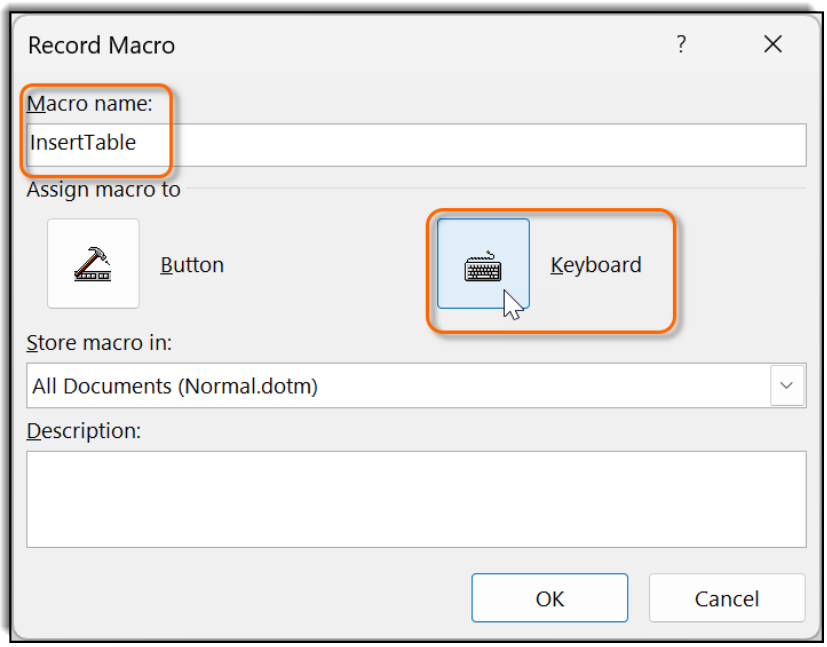
EVALUATION COPY: Not to be used in class.

2. In the **Record Macro** dialog box, enter a name for the macro, and, to have the macro available with each new document, make sure the **Store macro in** textbox displays **All Documents (Normal.dotm)**. You can also enter a **Description** if you like.



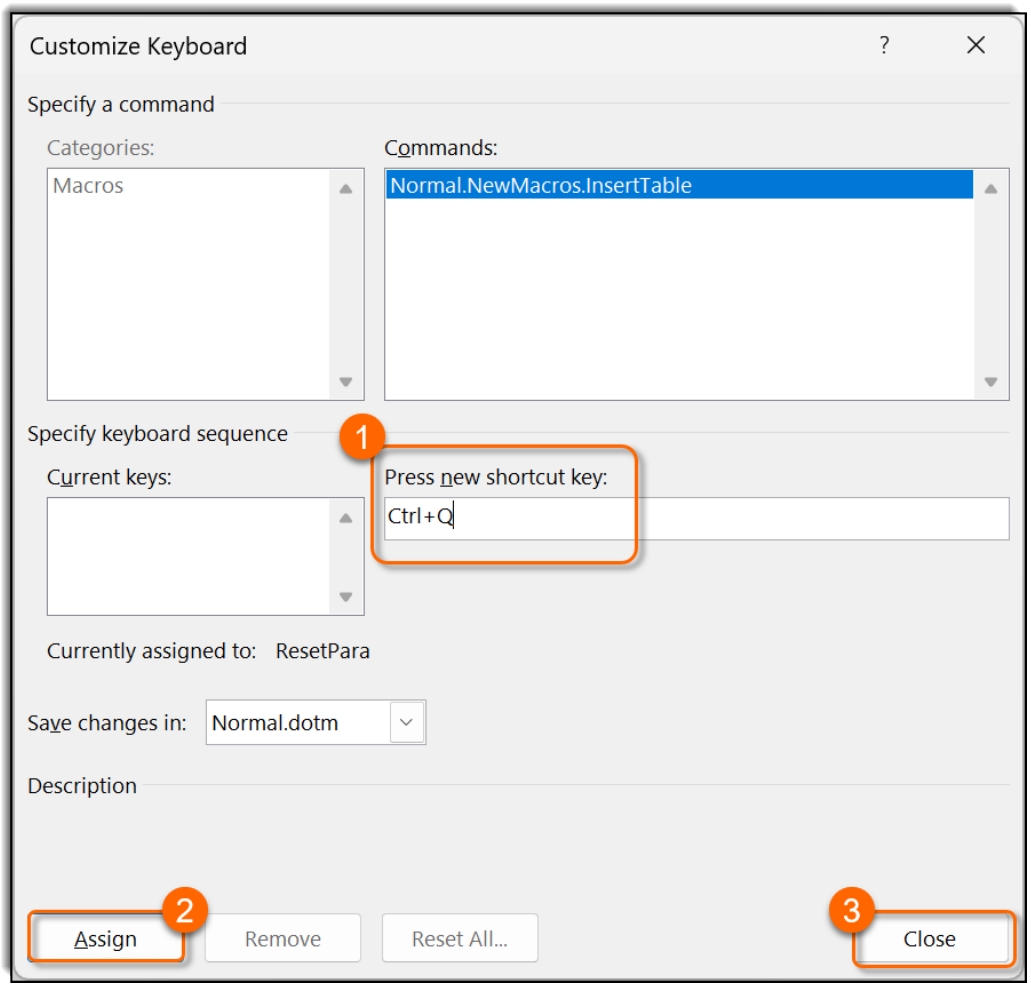
Evaluation Copy

3. In the **Record Macro** dialog box, enter a name for the macro and click **Keyboard**:



EVALUATION COPY: Not to be used in class.

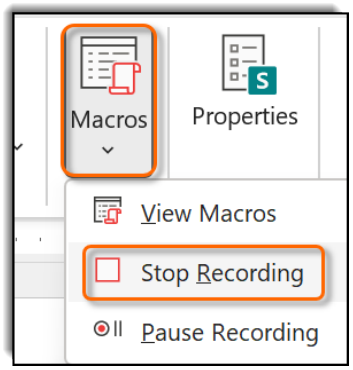
4. Assign the macro to a button or to a keyboard shortcut by clicking **Button** or **Keyboard**. We'll use the keyboard for our example. When you click **Keyboard**, the **Customize Keyboard** dialog box will open. Press the keyboard shortcut you want to use; it is displayed in the **Press new shortcut key** textbox. Click **Assign**, and then click **Close**:



5. Now perform the steps of the macro you are creating. Word displays a tape-recorder icon as it records:

6. When you are done, select the **Macros** command again and select **Stop Recording**:

EVALUATION COPY: Not to be used in class.



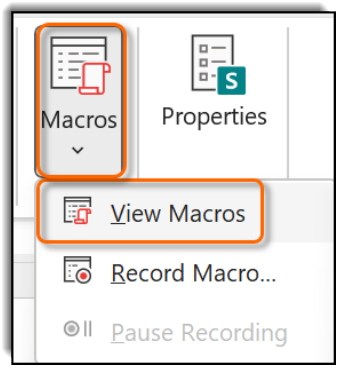
7. You can now use this keyboard shortcut to perform the action you specified.

❖ 7.1.1. Delete a Macro

Evaluation Copy

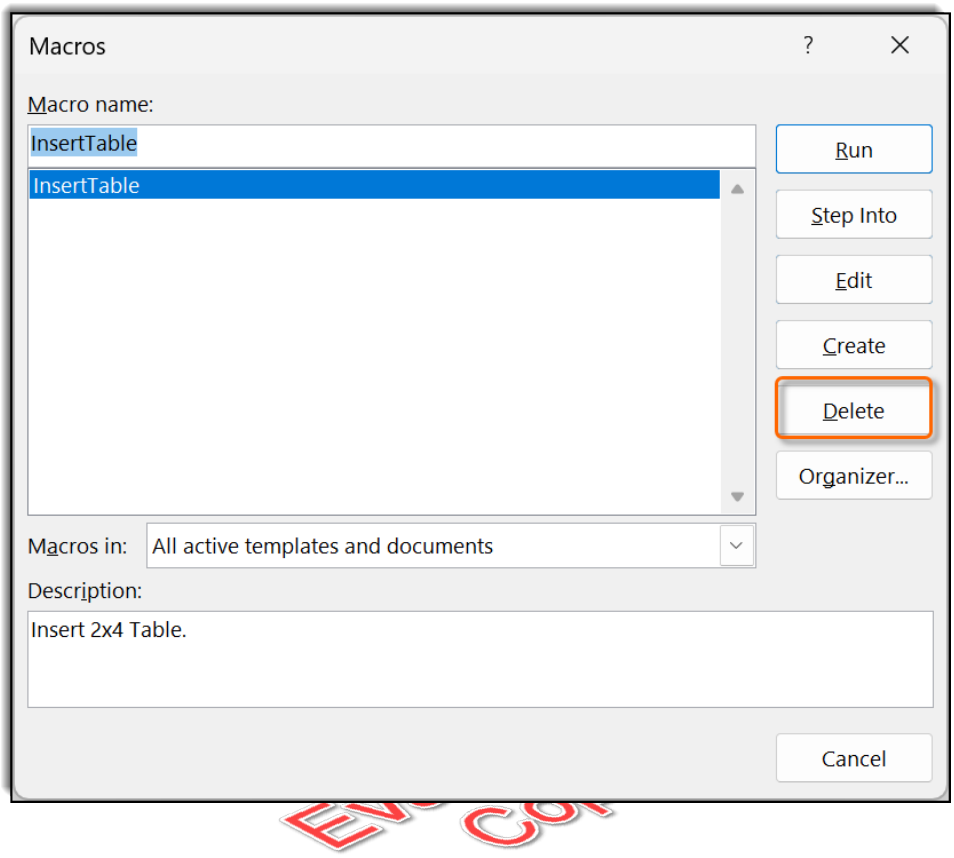
To delete a macro:

1. Select **View Macros** from the **Macros** dropdown:



2. In the **Macros** dialog, highlight the macro you want to delete and click **Delete**:

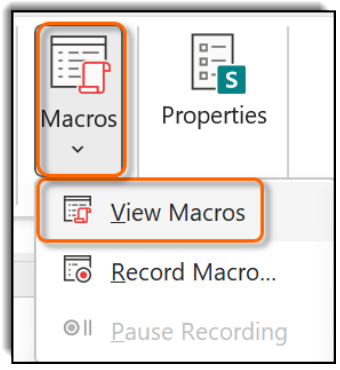
EVALUATION COPY: Not to be used in class.



❖ 7.1.2. Copy Macros from Document to Document

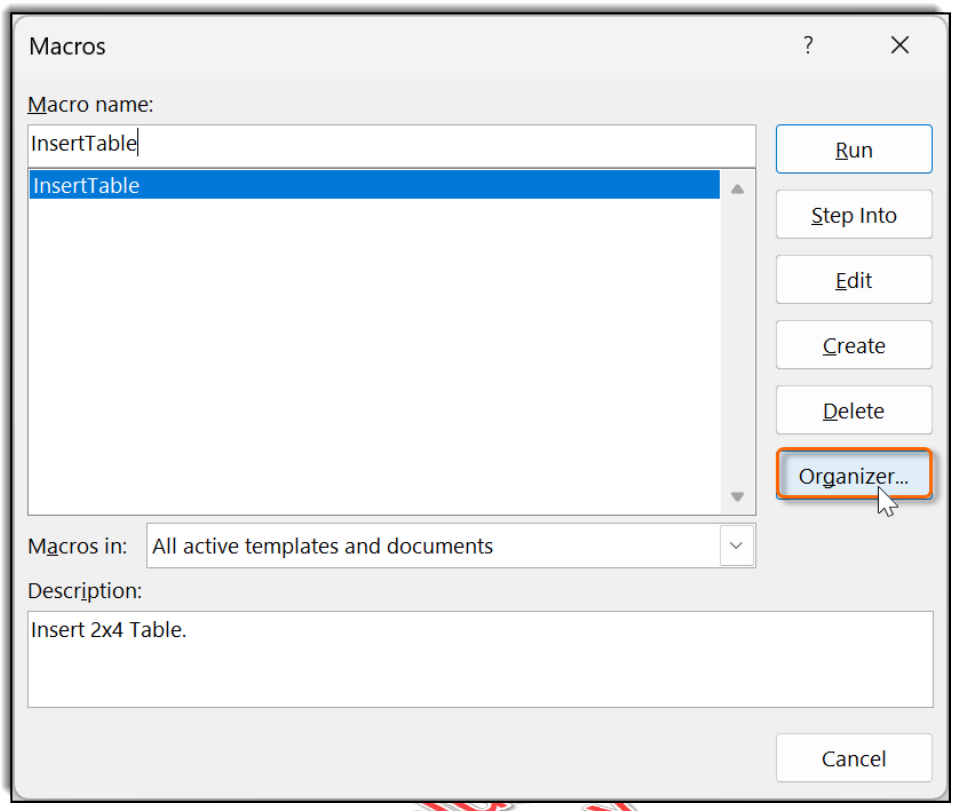
To copy macros from one document to another:

1. From the **View** tab of the Ribbon, in the **Macros** group, click **Macros** and select **View Macros**:



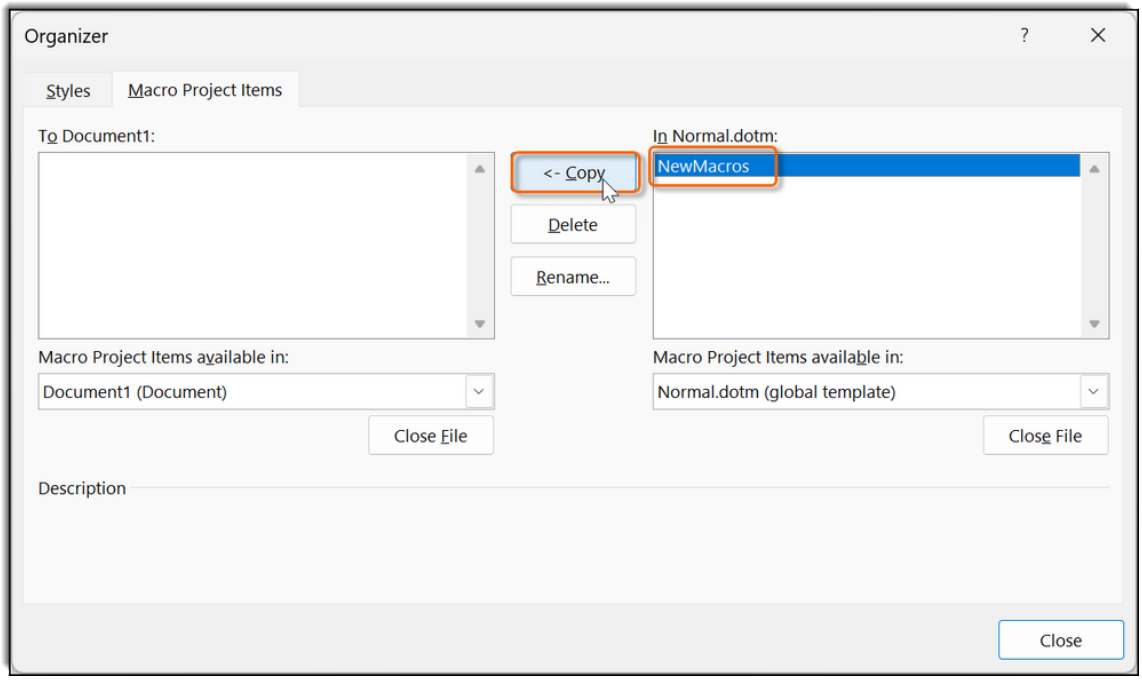
2. Select **Organizer** in the dialog box:

EVALUATION COPY: Not to be used in class.



Evaluation Copy

3. Use the Organizer to copy macros, and then click **Close**:

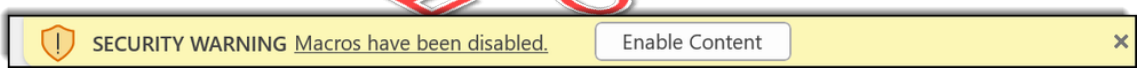


EVALUATION COPY: Not to be used in class.

❖ 7.1.3. Macro Security

Word documents with macros in them must be saved with a `dotm` file extension. When you open a file that contains macros, you will see a security warning in a yellow box at the top of the document. If the document is from a trusted source, select **Enable Content**:

Evaluation Copy



EVALUATION COPY: Not to be used in class.

Exercise 21: Recording a Macro

10 to 15 minutes

In this exercise, you will record a macro.

1. Open a blank Word document.
2. Create a macro called "MyMacro" that inserts a 5x8 table using the keyboard shortcut **Alt+M**.
3. Run the macro you just created to add a second table in the blank document

Evaluation Copy

Conclusion

In this lesson, you have learned to add a macro to a Word document.

EVALUATION COPY: Not to be used in class.