

Word Processing Using Word

- Common and useful features: inserting things into a document, formatting text through text styles and the format painter, finding text in a document, tables and formulas
- References: table of contents, bibliographies, citations, captions, footnotes and endnotes
- Mail merge
- Collaboration tools

Help with MS-Office products: <https://support.office.com/>

What You Already Know (Some Features Of Word)

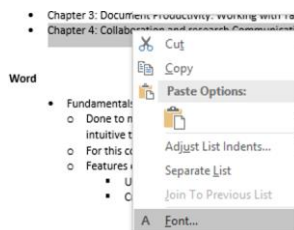
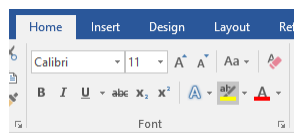
- Starting Word / Quitting Word
- Creating a new document
- Entering, deleting text along with simple edits
- Copy/cut pasting of text
- Saving a document
- Spell checking a document
- Printing documents
- Etc.
- For more information for catching up see the notes:
 - “Assumed student knowledge of Word” (Jan 9 – 15 of lecture schedule)

Additional Resources For MS-Word

- Basics (also includes some more advanced features)
 - <https://support.office.com/en-us/article/create-a-document-in-word-2016-aafc163a-3a06-45a9-b451-cb7250dcbaa1>
- Research, edit, and design (e.g. styles and themes)
 - <https://support.office.com/en-us/article/research-edit-and-design-in-word-2016-bc819ecd-9887-4a15-8eda-d90cbc58f8fb>
- Collaborating using Word
 - <https://support.office.com/en-us/article/collaborate-in-word-2016-b3d7f2af-c6e9-46e7-96a7-dabda4423dd7>
- Training videos
 - <https://support.office.com/en-us/article/word-for-windows-training-7bcd85e6-2c3d-4c3c-a2a5-5ed8847eae73?ui=en-US&rs=en-US&ad=US>
- MAC help (recall though this is not a MAC-specific course but we provide what help we can)
 - <https://support.office.com/en-us/article/word-2016-for-mac-help-c3292414-89c0-46e5-82a7-d55a1720f3bd>

MS-Office

- There's different ways of completing the same task
 - Alternatives make things easier for the user (different people may find one way more intuitive than another) e.g. fonts and font effects
 - Example: choosing fonts and font effects



- For this course and in “real life” one way isn't better than another (just learn *a* way that works)

Exam Questions

- Assignments will require you to invoke different features of Word
 - So you will learn how/where to run those features
- Exams: because they will be on paper and not in front of the computer
 - The focus will be on how different features of Word work over “where you have to click” in order to run those features.
 - Sample exam question (relatively easy): Refer to the line of text “The cat in the cat”. The entire line is selected and the bold toggle feature is run (e.g. selecting the feature in the ribbon or by right clicking on the text etc.). What is the result?
 - a) ‘Cat’ is bolded
 - b) ‘Cat’ is unbolded
 - c) The entire line is bolded
 - d) The entire line is unbolded

Inserting Page Breaks

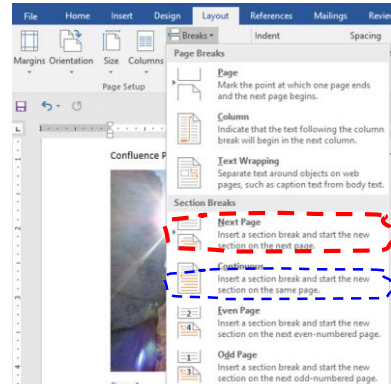
- Insert ->Page Break
- Moves text after the page break to the top of the next page
- This is not the same as a hard return (hitting the ‘enter’) key

Inserting A Section Break

- Sections in a document can have different formatting applied or have it's own sequence of page numbering
- Sections can be on different pages or reside on the same page.
- (Section breaks are actually not 'inserted' into a Word document).
 - Change layout
- **Section on different page**
 - Layout->Breaks->Next page
- **Section on same page**
 - Layout->Breaks->Continuous

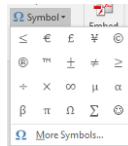
Left formatted text

Column 1	Column 2
Asdflkjasdfh.	Asdflkjasdfhkasdfkja.
Asdflkjasdfhkasd.	Asdflkjasdfhkasdfkja.
lkasdfhkasdfhkasdfh.	lkasdfh.
Asdflkjasdfhkasdfh.	kljaskdfhkasdfhkasdfh.
Asdflkjasdfh.	kljaskdfhkasdfh.

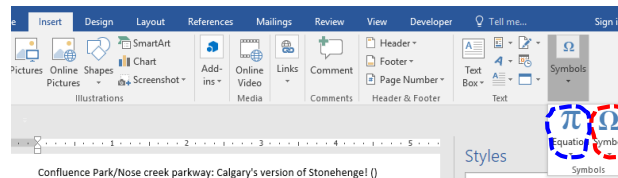


5. Insertions: Symbols & Equations

- A useful time saver:
 - **Symbols**



- Insert->(Symbols group: Symbols)

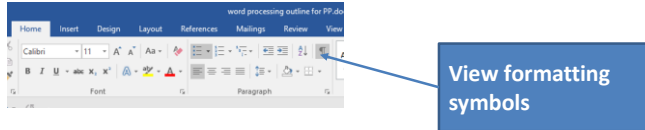


- **Equations**

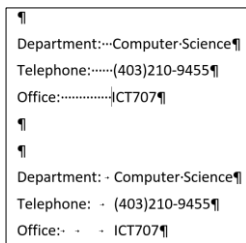
- Insert->(Symbols group: Equations)

Show/Hide Formatting Symbols

- Some characters (e.g. formatting) affect formatting but have no visible appearance (e.g. space, tab etc.)



- Formatting symbols (tabs vs. spaces)



Sometimes Seeing Formatting Symbols Can Be Useful

- Why can't Row 2 resize

Cell 1	Cell 2
Cell 3	Cell 4
Cell 5	Cell 6

Cell·1␣	Cell·2␣	␣
Cell·3¶	Cell·4␣	␣
␣		
Cell·5␣	Cell·6␣	␣

¶

Text Styles

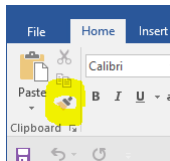
- Home->(‘Styles’ group)



- Styles have pre-defined fonts, font sizes and font effects which can be applied with a single click.
- Word comes with pre-defined styles that can be applied to text.
- New styles can also be pre-defined
- Some documents may be formatted (e.g. margins, spacing, fonts, font effects etc.) to conform to common writing styles:
 - APA template:
 - <https://templates.office.com/en-US/APA-style-report-6th-edition-TM03982351>

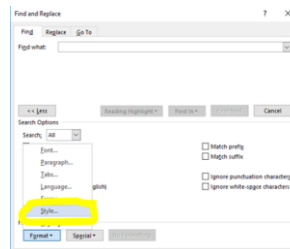
The Format Painter

- A shortcut to using styles is the format painter (copy-paste formatting)
 - Home->Clipboard group: Format painter



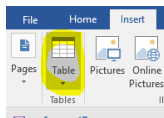
Finding Text In A Document

- This is one of the major advantage for having an electronic instead of a paper copy.
 - Example: “Where in this *giant* section of notes did Tam talk about ‘inserting’ things into Word”
- Shortcut:
 - <Ctrl>-<f> Press both keys (same time or one after another without releasing the first)
 - Home->Editing group: Find (or Replace)
 - Styles can even be ‘found’ and replaced



Working With Tables (Basics Are Assumed Knowledge)

- *Creating a new table*
 - *Insert->Table*



- *Tables in Word allow for simple (simple as compared to a spreadsheet such as Excel) calculations to be performed*
 - *Layout (new tab on far right)->(Data group: formula)*

Table Formulas To Know For The Exam

- Average(<direction>)
 - Max(<direction>)
 - Min(<direction>)
 - Sum(<direction>)
- Directions: above, below, left, right
 - Example (created via: Layout->(Data group: Formula) & inserting into Row 4, Column 1):

1	1	1	
2	2	2	
3	3	3	

Inserted formula
=sum(left)

Inserted formula
=average(above)

Note: Inserting Formulas Via Running a Feature In The Ribbon Vs. Typing

- With the previous example and the data in the first three rows:

1
2
3

- Selecting the 4th row and directly typing in there '=sum(above)' will have the result be treated as text and yield:

1
3
5
=sum(above)

Sub-Section: References

- Table of contents
- Bibliography
- Citations
- Captions
- Foot/end notes

Table Of Contents (What You Need Before Inserting One)

- **The 'Heading' styles must be used** (or a new style created that is derived from either Heading 1, Heading 2 or Heading 3).
- That is because the headings (and sub headings) in the document will be used to form the table of contents.

Table of Contents	
Heading1	1
Subheading 1A.....	1
Subheading 1B.....	1
Heading2	1

[Heading1](#)
[Subheading 1A](#)
Text: blah blah blah
[Subheading 1B](#)
[Heading2](#)

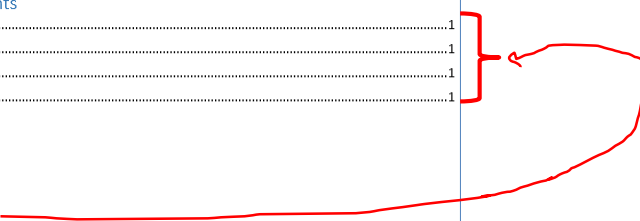


Table Of Contents

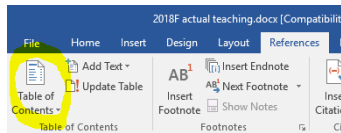
Places of Interest: Calgary

Table of Contents

Spruce Meadows.....	2
“Cool” running bridge.....	4
Split rock.....	5
Bibliography.....	6

- In Word

- References->Table of Contents->(Select the type of table: For A1 it's “Automatic Table 2”)

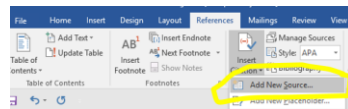


Citation

- **Step 1: Create the citation** (enter information regarding the source or 'citation')

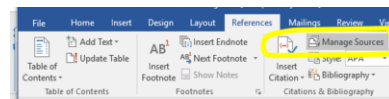
- Creating citation in Word:

- References->Insert Citation->Add New Source



- (If you need to change the citation later):

- References->Insert Citation->Manage Sources->Select the citation->Edit



Step 1: Create the citation (2)

- **Step 1: Create the citation (continued)**

- Entering the information for the (source of the) citation e.g. “Film”

Citation (2)

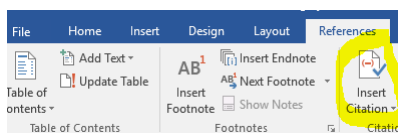
- **Step 2: Using or referring to the citation**

“Cool” running bridge

This old bridge might not look like much but Disney filmed part of the movie "[Cool Runnings](#)" here (the place where the Jamaican bobsled team pelts [John Candy](#) with snowballs).

“One dream. Four Jamaicans. Twenty below zero.” (Turteltaub, 1993)

- Navigate to the location in Word where the citation will be located
- Insert the citation at that location:
 - References -> Insert Citation -> (Select the citation source from the list)

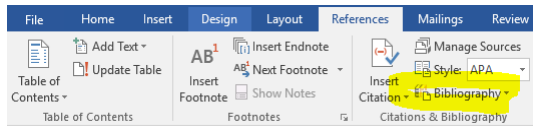


Bibliography

Bibliography

Turteltaub, J. (Director). (1993). *One dream. Four Jamaicans. Twenty below zero*. [Motion Picture].

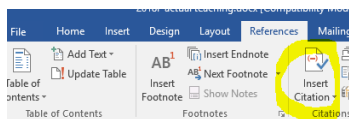
- The above bibliography was created from the previous citation.
- In Word
 - For A1: References->Bibliography->(Select Bibliography)



(Image) Captions

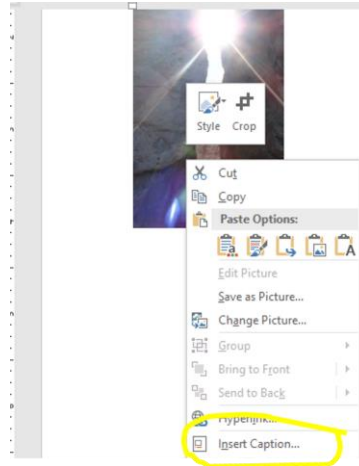


- Via the Word Ribbon:
 - References->Insertion Caption



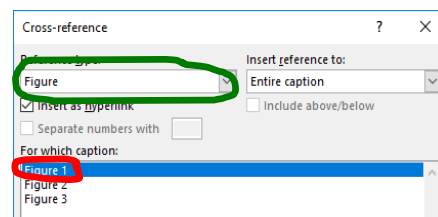
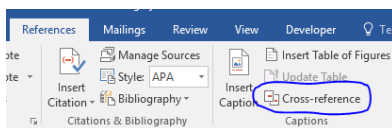
(Image) Captions (2)

- Via Right-click in Word
 - Select image
 - Right click
 - Select “Insertion caption”



Cross References

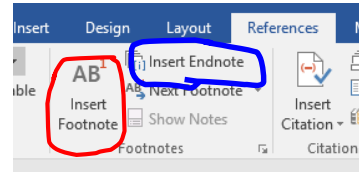
- Text that refers to items in the document such as figures and tables.
 - Don't just “type in” this text. (Why not?)
- **Step 1:** Caption the image (previous slide)
- **Step 2:** Insert the caption that refers to the image
 - References -> **Cross Reference** -> (Select the type of reference: **Figure**) -> (Select the figure being referenced)



Footnotes And Endnotes

- **Footnote**

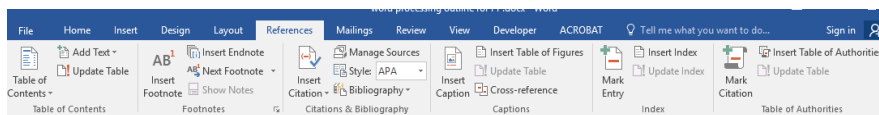
- Appear at the **end of the page**
- **Step 1:** Navigate to the location where the footnote will appear
- **Step 2:** References->Insert Footnote
- **Step 3:** Enter the information for the footnote (appears at bottom of page)



- **Endnote**

- Appear at the **end of the document**
- **Step 2:** References->Insert Endnote
- All other steps are the same

Automatically Generating References & Captions (Word)



- Q: Why not just type them in manually?
- **No credit will be earned for the assignment if you manually type in information such as a table of contents or figure captions.**

Recap Of This Section: Things You Should Now Know

- **How to run** (although **not for the exam**) the following features of Word as well as **how they work** (know for the exam)
 - Inserting a table of contents
 - Creating new citations, inserting citations
 - Creating a bibliography from citations
 - Inserting image captions, creating cross references
 - Inserting footnotes and endnotes

Sub-Section: Mail Merge

Mail Merge: How It Works

- Combines information from a main document (a Word document sometimes referred to as the 'starting document') with a data source (e.g. Excel spreadsheet, Access database sometimes referred to as the 'recipients' list).
- The information specified in the main document stays the same (e.g. a form letter) whereas the data source provides the customized information.
- Example customizations (non-exhaustive list):
 - Letters & emails
 - Envelopes
 - Labels

Mail Merge

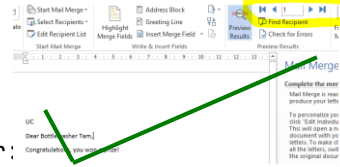
- MAC users caution: It appears that the mail merge feature is implemented in a different fashion.

Mail Merge:

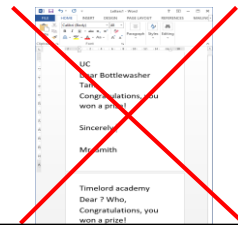
- **Example:**

- Folder name: mail_merge_example
- Starting files in the folder:
 - starting_recipient_list (Excel file)
 - starting_letter (Word document)
- Products of the merge in the folder:
 - merged_letter (you can “click through” (preview) the merged letters, this is how you should do it for the assignment in order to be awarded credit).
 - step6_completed_merged_letters (you can see the results of the mail merge in a single printable Word document but because these results could have created with out a mail merge you won’t be awarded credit if you submit this for the assignment).

merged_letter



step6_completed_merged_letters



Example Mail Merge Process

Main document

```
<< Address >>
Dear <<Name>>,

Congratulations, you won a prize!

Sincerely,
Mr. Smith
```

Merged document (don't submit this for the assignment)

```
U of C
Dear Bottlewasher Tam,

Congratulations you won a prize!

Sincerely,
Mr. Smith

-----
Galifrey
Dear ? Who,

Congratulations you won a prize!

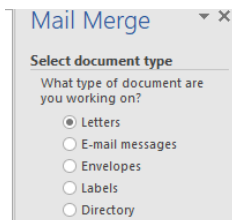
Sincerely,
Mr. Smith
```

Data source

Title	Last name	Last name	Address
Bottlewasher	James	Tam	U of C
?	Dr.	Who	Galifrey
...

Mail Merge: Step 1 (Document Type)

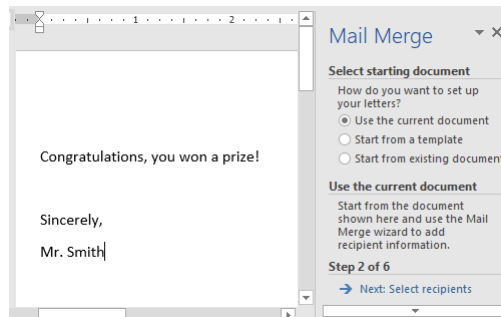
- Determine the type of main document needed (A1 = 'letter')
- The easiest approach when first learning how to do it is to use the Mail merge wizard
 - Mailings->Start Mail Merge->Step-By-Step Mail Merge Wizard
 - (In the right hand side of the Window select the type of document):



- Click 'next' to create or select the main document

Mail Merge: Step 2 (Creating Document)

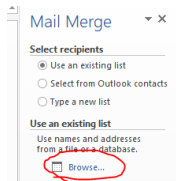
- Select or enter the information for your main document.



- The parts of the letter that are always the same (appears in each letter) is entered in the left part of the window.
- Click 'next' to select the recipients

Mail Merge: Step 3 (Recipients)

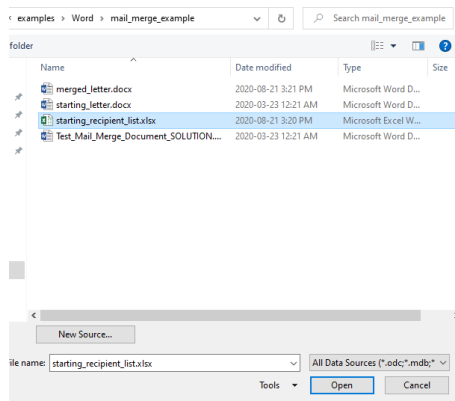
- What's done prior to this step: Mailings->Start Mail Merge->Step-By-Step Mail Merge Wizard
- Do for this step: Use an existing list->Browse



- For this exercise select the spreadsheet: starting_recipient_list
- For A1 select an existing list: "clients.xlsx"
- Other options when specifying contacts:
 - Select from Outlook contacts
 - Type in a new list (creates an Access database)
- *Click 'next' to customize or create the letter*

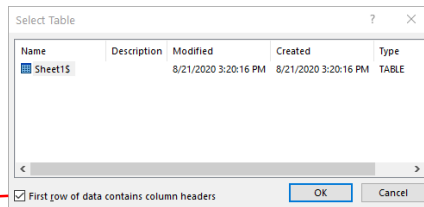
Step 3A

- Navigate to the location where the spreadsheet is located:
 - Click on the spreadsheet.
 - Click on the 'Open' button.



Step 3B

- Specify if the first row of the spreadsheet should or should not be treated as containing client information (headers are labels)
 - Exclude the first row, use the default “First row of data contains column headers”: click ‘OK’

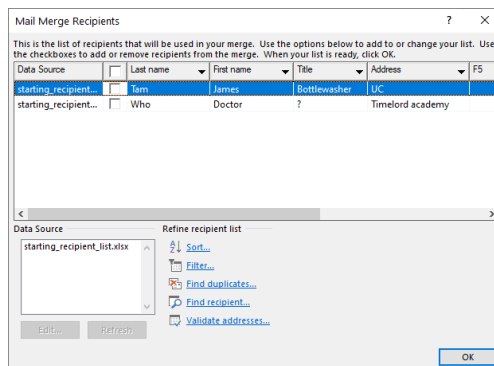


- FYI: in this case the first row of the spreadsheet doesn't contain client information.

	A	B	C	D
1	Title	First name	Last name	Address
2	Bottlewas	James	Tam	UC
3	?	Doctor	Who	Timelord academy

Step 3C

- Options for organizing and filtering the data from the spreadsheet.
 - For this exercise it's not necessary so just click ‘OK’



Mail Merge: Step 4 (Write)

- In Word it's labeled as 'write' the letter but for this exercise the letter has partially been written (the parts of the letter that appear the same for each client have already been typed in).
 - So for this exercise you can customize the letter: address & greet the person by name.
 - (However if you didn't anything for the letter previously then you can do so now).

Selecting the customized fields

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block... (marked with a red X)
- Greeting line... (marked with a red checkmark)
- Electronic postage...
- More items...

Letter

«AddressBlock»

«GreetingLine»

Congratulations, you won a prize!

Sincerely,

Mr. Smith

Fixed part of letter (no angled brackets)

Mail Merge: Step 4 (Alternate Write)

- Add the line that says "Congratulations, you won a prize!" put each of the following on it's own line.
 - Step 4A: Selecting the "address block" directly can be problematic so it's best to manually select the appropriate column 'address' from the spreadsheet.

Mail Merge

Write your letter

If you have not already done so, write your letter now.

To add recipient information to your letter, click a location in the document, and then click one of the items below.

- Address block... (circled in blue)
- Greeting line...
- Electronic postage...
- More items...

Insert Merge Field

Insert

Address Fields Database Fields

Fields:

Title

First name

Last name

Address

P5

P6

P7

P8

P9

P10

P11

Match Fields... Insert Close

Clients spreadsheet

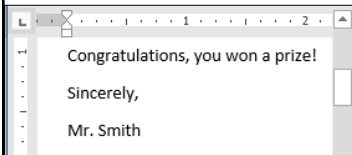
	A	B	C	D
1	Title	First name	Last name	Address

- Step 4B: Click "Greeting line" and then 'OK'. Word will customize the greeting with the client's name e.g. Dear Bottlewasher Tam
- Click 'next' to preview the letters

Mail Merge: Step 5 (Preview)

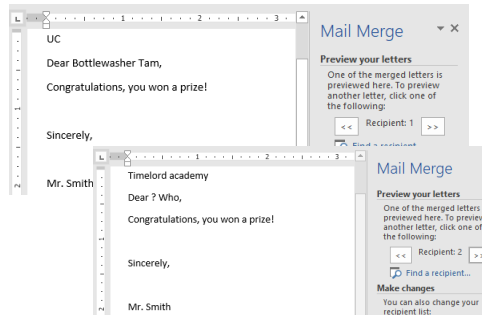
INPUTS

Original main document (text that is always the same) 'starting_letter'



OUTPUT

Merged letters (customized form letters): 'merged_letter'

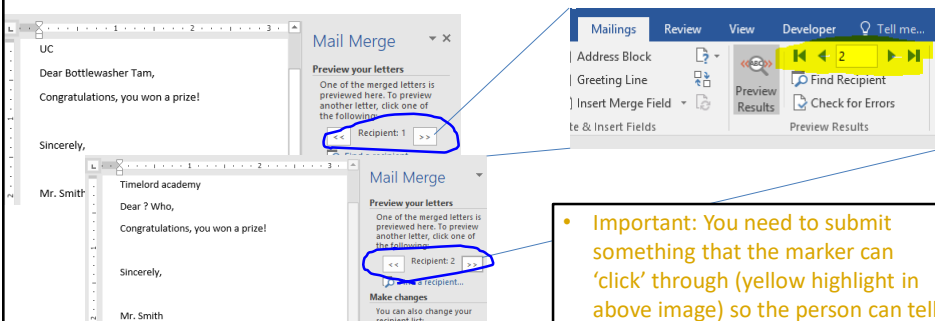


Data source (custom fields): 'starting_recipient_list'

	A	B	C	D
1	Title	First name	Last name	Address
2	Bottleswasher	James	Tam	UC
3	?	Doctor	Who	Timelord academy

Previewing Results: "Click Through" The Letters

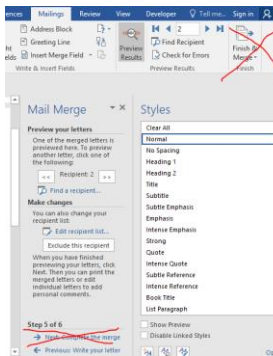
- Use the 'forward' and 'backward' controls



- Important: You need to submit something that the marker can 'click' through (yellow highlight in above image) so the person can tell the merge was correctly done.
- Don't expect credit for handing in something that looks like it could have been manually typed in ("finish and merge")

Mail Merge: Step 6 (Don't Submit The Product Of This Step For The Assignment)

- No need to complete this step for assignments.
- In “real life” it will produce an additional Word document that contains the output of the merge that can be printed or otherwise distributed.



Do not complete this step and hand in the resulting document for the assignment!

Step 6: End Product Of Completing The Merge

- You can see the document to view the end results:
“step6_completed_merged_letters”
 - (Image enlarges the fonts to make it easier to recognize the letters)
 - (The merge fields cannot be identified because it cannot be “clicked through” nor can they be edited) = “hard coded”
- Submitting this final ‘hard coded’ result (produced from Step 6: Finish and Merge) will result in **no credit**.
 - The results could have produced by manually typing the letters without using the mail merge feature.



Sample Exam Question: Mail Merge

- Given some main document and the details of a data source what will be the result of the mail merge.
- Example of how questions can focus on “how things work” over “where to click”

Mail Merge: Rules For Filtering The Merge

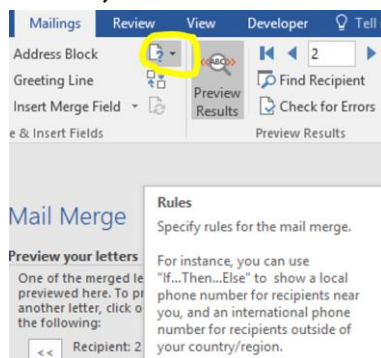
- **Example:**
 - Folder name: `merge_filter_rule`
 - Files in the folder:
 - `students` (Excel file),
 - `example_mail_merge_filter` (Word document)

Mail Merge: Rules For Filtering The Merge (2)

- The rules can produce different results in the merge document according to the data source.
- Two filter rules for this example:
 - Bcomm graduates see the extra message “Business graduates get a special offer.”
 - Rule based on age:
 - 65 and over: “You get a seniors discount.”
 - Under 65: “No seniors discount.”

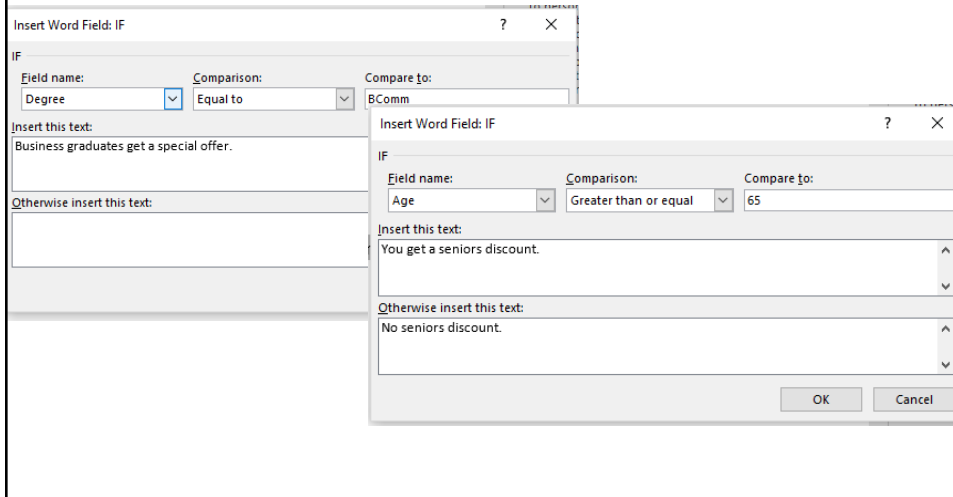
Mail Merge: Rules For Filtering The Merge (3)

- Mailings->(Write & Insert Fields group: Rules)->IF...THEN...ELSE



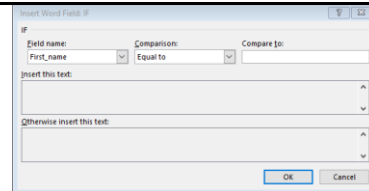
Mail Merge: Rules For Filtering The Merge (4)

- Specifying the rules for the mail merge filter



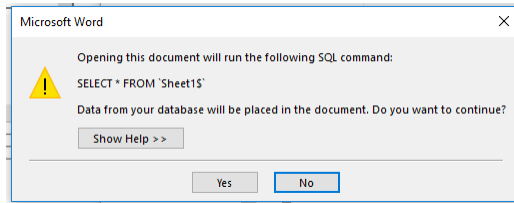
Sample Exam Question: Mail Merge Rules

- Writing rules.
 - Enter the information in the fields for the IF-Rule to produce a certain result.
- Tracing rules.
 - Given a data source and some pre-written rules what will be the resulting merge document.



Scary Message

- When you open the merged document again you will see a scary looking popup.



- Normally you should be cautious when encountering such warnings but you can largely ignore it for merge documents that you have created yourself which haven't been edited by others.
- After selecting 'Yes' you will then need to locate the spreadsheet and click on it.

Recap Of This Section: Things You Should Now Know

- **How to run** (although **not for the exam**) the following features of Word as well as **how they work** (**know for the exam**)
 - How to use mail merge to create a customized form letter.
 - Why use mail merge
 - Filtering merge results using IF-rules (writing and tracing rules)

Subsection: Collaboration Tools

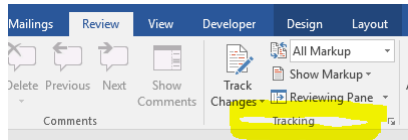
- Sharing documents
- Tracking the work of others
- Commenting on documents

Sharing Documents

- The focus for this course will be on the format of the document formats over cloud-based storage and sharing tools such as Dropbox or OneDrive.
 - Some file formats (e.g. .wmv, .bmp, .xpf) aren't commonly used so it reduces the ability to share.
- Both PDF and XPF documents have a fixed layout format retaining the original look and feel of electronic documents
 - Sometimes Word documents appear different on different printers
 - PDF: universal (viewable across multiple operating systems)
 - XPF: Microsoft specific

Tracking Work

- In Word it consists of tracking changes that have been made to a document over time.
- Visual annotations can be added in order to specify: what parts have changed and how they have changed.
- Access in Word
 - Review->(Tracking group)



Turn On Tracking

- Review->Track Changes->(Select “Track Changes”)

No changes here

Mary ~~had~~have a little lambs



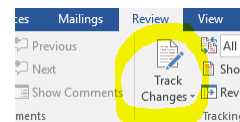
Nothing changed here, nothing to see

Before

No changes here

Mary have little lambs

Nothing changed here, nothing to see



After

No changes here

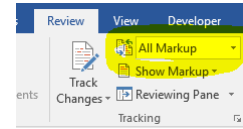
Mary had a little lamb



Nothing changed here, nothing to see

Levels Of Annotations

- Review->(Tracking Group)
- Level of detail via 3 levels of markup



No Markup



Simple Markup

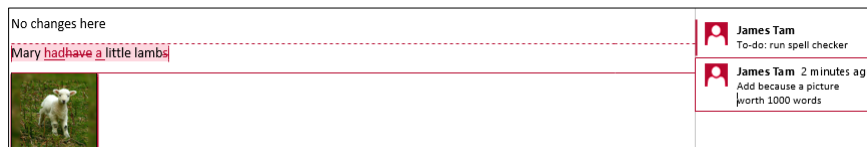
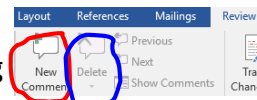


All Markup



Commenting On Documents

- Think of it as the electronic equivalent of “sticky notes” attached to document providing explanations to other authors or even for yourself



– Adding comments

- Review->New Comment

– Removing comments (select a comment and then complete the following):

- Review->Delete

Recap Of This Section: Things You Should Now Know

- The difference between PDF and XPS documents and benefit of these types of documents
- **How to run** (although **not for the exam**) the following features of Word as well as **how they work** (know for the exam)
 - Tracking changes:
 - Setting different levels of viewing detail (markup)
 - Commenting on documents

Summary: Prior Skills

- Starting Word
- Using pre-created Word templates
- Creating blank documents
- Entering text into Word
- Navigating a Word document
- Various ways of copy pasting
- Accessing features of Word via the ribbon and through right clicking
- Formatting text
- Paragraph effects: alignment, lists
- Spell checking a document
- Save vs Save as

Summary: Prior Skills (2)

- Tagging documents
- Creating PDF documents
- Printing a document
- Quitting Word
- Converting between versions of Word
- Changing margins
- Using/setting tabs
- Paragraph formatting effects
- Moving text to the next line: word wrap, hard return, soft return

Summary: Skills Covered In The Word Section

- Inserting page & section breaks as well as symbols and equations
- Showing/hiding formatting symbols and the benefit of seeing formatting symbols
- How to use, create and apply text styles
- Using the format painter to copy-paste formatting effects
- Finding/replacing text (and styles) in a document
- 4 common table formulas

Summary: Skills Covered In The Word Section (2)

- Inserting a table of contents
- Creating new citations, inserting citations
- Creating a bibliography from existing citations
- How to use mail merge to create a customized form letter.
- Why you should use mail merge
- Filtering merge results using IF-rules (writing and tracing rules)

Summary: Skills Covered In The Word Section (3)

- Inserting image captions, creating cross references
- Inserting footnotes and endnotes
- The difference between PDF and XPS documents and benefit of these types of documents
- Tracking changes:
 - Setting different levels of viewing detail (markup)
- Commenting on documents

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