
Microsoft Word: Advanced

For Lifelong Learners



Cochise College
Center for Lifelong Learning

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Expectations

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

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Microsoft Word: Advanced

Introduction

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

ACTIVITY 1: START WORD

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

Cross-references

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

ACTIVITY 2: INSERT A CROSS REFERENCE

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

8. Test the new link by pressing **CTRL** and clicking on **NEWSPAPER ARTICLES**.

Integrate Word and Excel

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

ACTIVITY 3: LINK EXCEL TO WORD

1. Click anywhere in the table on *Line 40*.
2. Click **TABLE LAYOUT → ROWS & COLUMNS → DELETE → DELETE TABLE**.
3. Click *Line 40* and tap **END**.
4. Tap **ENTER** twice to create two blank lines.
5. Click *Line 41*.
6. Open *Charleston-Table.xlsx* in the *Student Files* folder.
7. Complete these steps to link the *Excel* sheet to the *Word* document.
 - a. In the *Excel* spreadsheet, select cells **A1** through **B8**.
 - b. Click **HOME → CLIPBOARD → COPY**.
 - c. Return to the *Word* document.
 - d. Click **HOME → PASTE → LINK & USE DESTINATION STYLES**.
8. Click anywhere in the newly created table.
9. Select **TABLE DESIGN → TABLE STYLES → GRID TABLE 4 ACCENT 3**.
10. Click **DATE** in the first column.
11. Click **TABLE LAYOUT** and adjust the width to **1.5"**.
12. Click **EVENT** in the second column and set its width to **4.0"**.
13. Click anywhere in the table.
14. Click **TABLE LAYOUT → TABLE → SELECT → SELECT TABLE**.
15. Click **HOME → CENTER ALIGN**.
16. Click **HOME → PARAGRAPH → LINE AND PARAGRAPH SPACING → 1.0**.
17. Click **HOME → PARAGRAPH → LINE AND PARAGRAPH SPACING → REMOVE SPACE AFTER PARAGRAPH**.
18. Save *Charleston-Advanced.docx*.

ACTIVITY 4: UPDATE THE EXCEL TABLE

1. Open *Charleston-Table.xlsx* if it's not already open.
2. Click cell **B7**.
3. In the edit bar at the top of the screen, change *a few* to ***several***, transforming the cell into: *An earthquake jarred Charleston, and several buildings sustained damage*.
4. Tap **ENTER**.
5. Open the *Word* document.
6. Right-click on the table.
7. Select **UPDATE LINK**. Notice that the changed line is updated in *Word*.
8. Click *Line 43* and tap **DELETE**.
9. Save and close both *Charleston-Table.xlsx* and *Charleston-Advanced.docx*.

Document Operations

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

ACTIVITY 5: TRACK CHANGES

1. In *Word*, click **FILE → OPEN**.
2. Click **BROWSE**.
3. Navigate to the *Student Files* folder and open *Jumping Frog.docx*.
4. Click **FILE → SAVE AS**.
5. Enter *My Jumping Frog* as the new file name.
6. Click **SAVE**.
7. Click **REVIEW → TRACKING → TRACK CHANGES**.
8. Click **REVIEW → TRACKING → ALL MARKUP**.
9. Triple-click the first paragraph, starting with *IN ENGLISH...*
10. Tap **DELETE**.
11. The paragraph isn't immediately erased but marked for deletion.
12. Place the cursor at the start of the second paragraph, starting with *Even a criminal...*
13. Insert *In this country,* (include the space after the comma).
14. Change the capital **E** to a lowercase **e** in *Even*.
15. Click **REVIEW → TRACKING → REVIEWING PANE → REVIEWING PANE VERTICAL**.
16. Click the first marked-for-deletion paragraph and click **REVIEW → CHANGES → ACCEPT THIS CHANGE**.
17. To accept all changes, click **REVIEW → CHANGES → ACCEPT ALL CHANGES**.
18. Close the *Revisions* pane by clicking the **X** in its top right corner.
19. Click **REVIEW → TRACKING → TRACK CHANGES** to turn off tracking.

ACTIVITY 6: CREATE COMMENTS

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

ACTIVITY 7: ADD A WATERMARK

1. Click **DESIGN → PAGE BACKGROUND → WATERMARK**.
2. Choose **Do Not Copy 1**.
3. Click **DESIGN → PAGE BACKGROUND → WATERMARK → REMOVE WATERMARK**.

Text Operations

ACTIVITY 8: ADD A SPECIAL SYMBOL

1. Click in the second paragraph, it reads "Mark Twain"

2. Tap **END**.
3. Click **INSERT → SYMBOLS → SYMBOL → MORE SYMBOLS**.
4. Click the **SPECIAL CHARACTERS** tab.
5. Click the **COPYRIGHT** symbol.
6. Click **INSERT**.
7. Click **CLOSE**.

ACTIVITY 9: INSERT AN EQUATION

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

ACTIVITY 10: CREATE AN EQUATION

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

$$a^2 + b^2 = c^2$$

ACTIVITY 11: INSERT A HYPERLINK

1. Click in the first line of the second paragraph, it starts with *This gentleman's article...*
2. Tap **HOME**.
3. Type <https://georgeteaches.com> into the document. As a space is added after the URL, Word identifies it as a hyperlink and formats it properly.
4. Select [HTTPS://GEORGETEACHES.COM](https://georgeteaches.com) and tap **DELETE**.
5. Enter Click Here.
6. Select **CLICK HERE**.

7. Click **INSERT → LINKS → LINK**.
8. Enter <https://georgeteaches.com> into the address box.
9. Click **OK**.
10. Test the hyperlink by holding **CTRL** while clicking the link.
11. Select **CLICK HERE** and tap **DELETE**.

ACTIVITY 12: USING QUICK PARTS

1. Click in the first line of the second paragraph, it starts with *This gentleman's article...*
2. Tap **HOME**.
3. Type *Reviewed by George Self.*
4. Select **REVIEWED BY GEORGE SELF**.
5. Click **INSERT → QUICK PARTS → SAVE SELECTION TO QUICK PARTS GALLERY...**
6. Accept all the dialog box defaults and click **OK**.
7. Select **REVIEWED BY GEORGE SELF**.
8. Tap **DELETE**.
9. Click in the first line of the second paragraph, it starts with *This gentleman's article...*
10. Tap **HOME**.
11. Click **INSERT → QUICK PARTS → REVIEWED BY**.

ACTIVITY 13: INSERT AN ICON

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

ACTIVITY 14: APPLY TEXT EFFECTS

1. Triple-click the document title.
2. Click **HOME → FONT → TEXT EFFECTS AND TYPOGRAPHY**.
3. Hover the mouse over each effect and notice the change to the title.
4. Click the desired effect to change the title.
5. Save and close *My Jumping Frog.docx*.

Advanced Operations

Using A Template

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

ACTIVITY 15: SELECT A TEMPLATE

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

ACTIVITY 16: MODIFY A TEMPLATE

1. Click **FILE → OPTIONS → CUSTOMIZE RIBBON**.
2. Activate the *Developer* ribbon item by checking that box.
3. Click **OK**.
4. Click the document title, **MEMO**, and change it to **Memo Subject**.
5. Transform the words *Memo Subject* into a text field by triple-clicking and then click **DEVELOPER → CONTROLS → PLAIN TEXT CONTENT CONTROL**.
6. Click the paragraph that starts *Some of the sample text*, then tap **DELETE** two times.
7. Click the paragraph that reads *View and edit*, and type **Memo body**.
8. Triple-click **MEMO BODY**.
9. Click **DEVELOPER → CONTROLS → PLAIN TEXT CONTENT CONTROL**.
10. Save the document.
11. Double-click the *Contoso* logo in the document's header. If the logo is not selected (if the "drag handles" are not present), click it one more time.
12. Right-click the *Contoso* logo and click **CHANGE PICTURE → THIS DEVICE**. (Note, this option is named *From File* on Office 2019.)
13. Select **WEBWORX.PNG** from the *Student Files* folder.
14. The logo needs resizing, so click **PICTURE FORMAT → SIZE** and adjust its height to **0.75"**.
15. Click **HEADER & FOOTER → NAVIGATION → GO TO FOOTER**.
16. Enter **123 Main Street, Sierra Vista, AZ 85635**. Also, enter **(520) 123-4567** and **webworx.com**.
17. Click **HEADER & FOOTER → CLOSE → CLOSE HEADER AND FOOTER**.
18. Save and close the document.

ACTIVITY 17: USE A TEMPLATE

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

Save As PDF**ACTIVITY 18: SAVE A PDF VERSION**

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

Mail Merge

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

ACTIVITY 19: CREATE A MAIL MERGE DOCUMENT

1. Click **FILE** and **OPEN**.
2. In the *Student Files* folder, find **APPRECIATION.DOCX**.
3. Click **OPEN**.
4. Click **FILE** and **SAVE AS**.
5. Navigate to the *Student Files* folder.
6. Name the document *MyFax* and click **SAVE**.
7. Click **MAILINGS → START MAIL MERGE → STEP-BY-STEP MAIL MERGE WIZARD**.
 - a. In the first step, select **LETTERS**, then click **NEXT**.
 - b. In the second step, click **USE THE CURRENT DOCUMENT**, then click **NEXT**.
 - c. In the third step, select **USE AN EXISTING LIST**.
 - d. Click **BROWSE**.
 - e. Navigate to the *Student Files* folder and click **APPRECIATIONDB**.
 - f. Click **OPEN**.
 - g. In the *Select Table* dialog box, choose **FAX DATA** and **OK**.
 - h. Make certain all names are checked.
 - i. Click **OK**.
8. Click **NEXT**.
9. Double-click **NAME** beside the *To* line.
10. Click **MORE ITEMS** in the Wizard.
11. Highlight the word *Name* and click **INSERT**.
12. Click **CLOSE**.
13. Double-click **PHONE** beside the *Phone* line.

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

Summary

Congratulations on completing the Advanced Word Skills Class! You've now mastered a wide array of sophisticated features that will greatly enhance your document creation and management abilities. From skillfully integrating Word with Excel to expertly tracking changes and creating mail merges, your newfound skills open a world of possibilities for effective and efficient document handling. The use of advanced formatting options like text effects, watermarks, and icons will add a professional flair to your work. Remember, these tools are not just for learning; they are practical skills you can apply in your everyday tasks, whether for personal projects, professional reports, or creative endeavors. Keep exploring and applying these advanced features to make your documents stand out and your workflow more seamless. Your journey with Word doesn't end here—it's just the beginning of a more skilled and confident you in document creation and management!



Appendix: Advanced Table Formatting

This appendix introduces a few advanced table formatting techniques that will create professional and visually appealing tables in Word documents.

- 1) Merging and Splitting Cells
 - a) To merge cells horizontally, select the cells you want to merge, click **TABLE TOOLS → LAYOUT → MERGE CELLS**.
 - b) To merge cells vertically, select the cells, right-click, and choose **MERGE CELLS**.
 - c) To split merged cell, select the cell, click **TABLE TOOLS → LAYOUT → SPLIT CELLS**.
- 2) Applying Table Styles
 - a) Select the cell(s) you want to format, click **TABLE TOOLS → DESIGN → TABLE STYLES**.
- 3) Sorting Table Data
 - a) Select the table or the range of cells you want to sort.
 - b) Click **LAYOUT → DATA → SORT**.
 - c) To sort by multiple columns, specify additional sorting criteria in the “Then by” section.
- 4) Performing Calculations in Tables
 - a) To perform calculations in a table, place the cursor in a cell where you want the result.
 - b) Click **LAYOUT → DATA → FORMULA**.
 - c) In the "Formula" dialog box, clear the “Formula” box.
 - d) Enter “=” in the Formula box.
 - e) Select the desired function in the Paste box.
 - f) Enter “above” in the parenthesis of the formula box.
 - g) Select the number format desired for the result.
 - h) Click **OK** to insert the formula result into the cell.
- 5) Formatting Table Borders and Shading
 - a) Select the specific cells you want to format.
 - b) Click **DESIGN → TABLE STYLES → BORDERS → SHADING** and apply the desired shading to the cell.
 - c) For more control, click the **BORDERS AND SHADING** dialog box launcher in the *Borders* group.

By mastering these advanced table formatting techniques, you'll be able to create tables that effectively present and organize your data. Experiment with different styles, calculations, and chart types to enhance the visual appeal and functionality of your Word documents.