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Microsoft® Word® Introduction and Certification Study Guide

Microsoft® 365 Apps and Office® 2019



Daniel John Stine AIA, CSI, CDT



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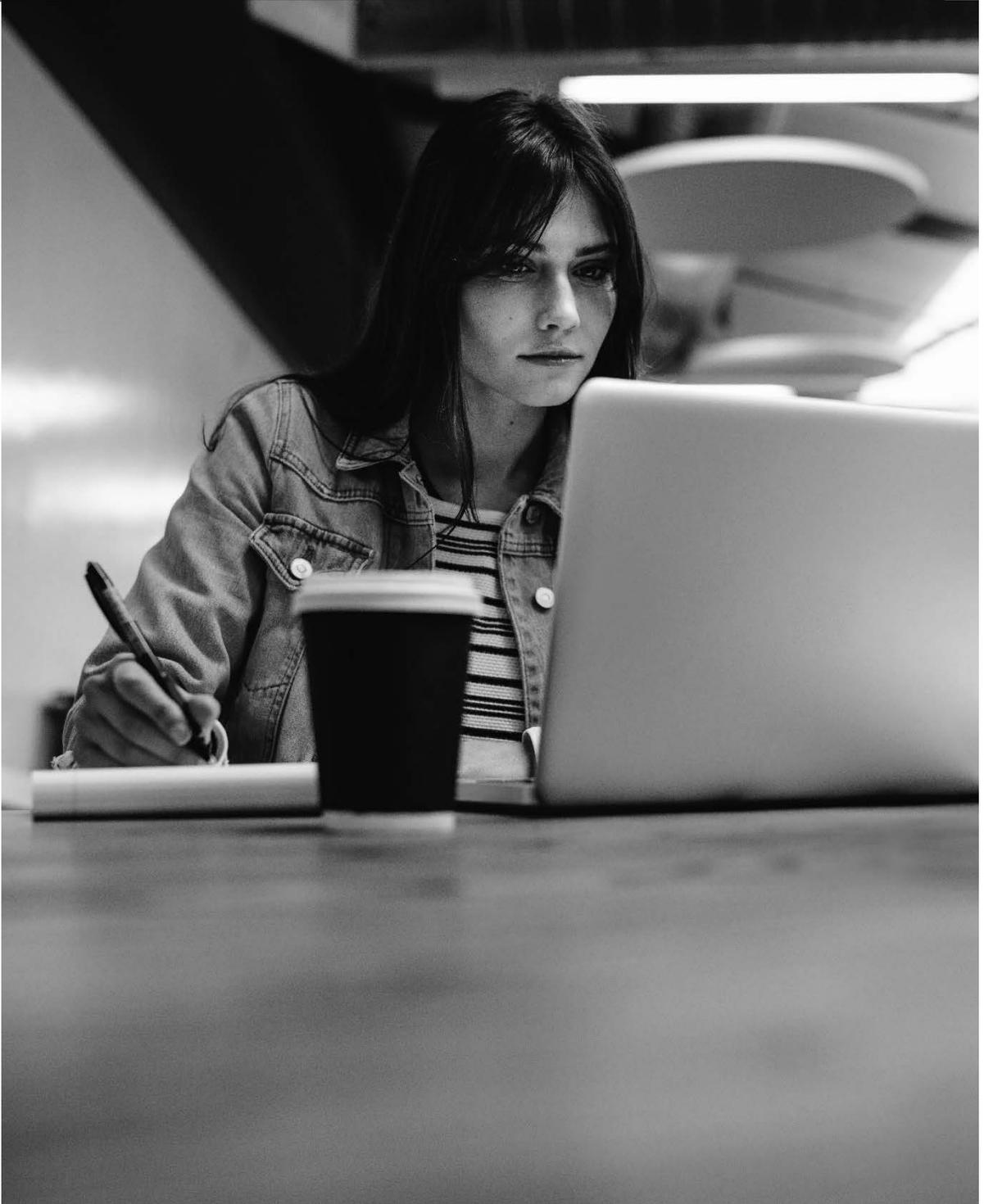


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1 Manage Documents



Introduction

Review essential aspects of Word: navigation, formatting, saving and inspecting documents.

1.0 Create documents

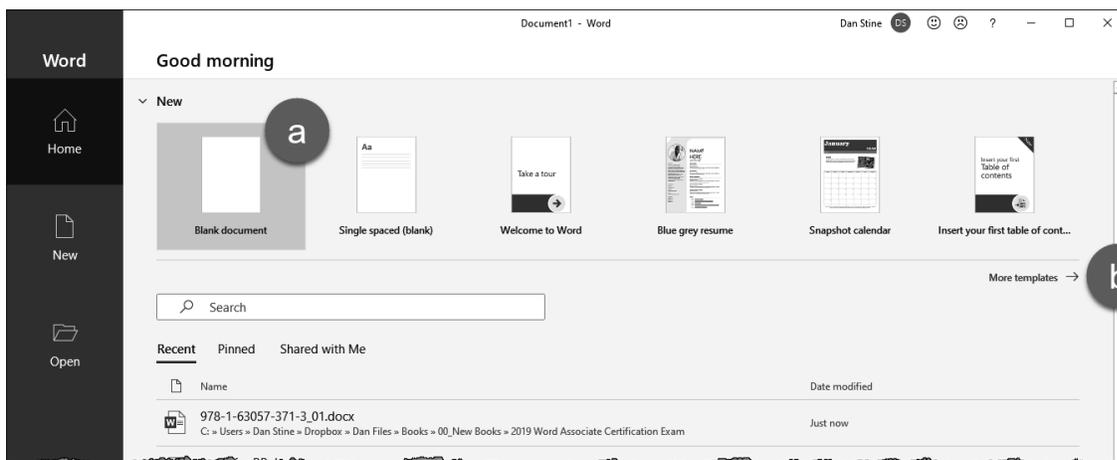
The process of learning how to use Microsoft Word starts with opening the application, which was covered in the previous chapter, and then creating a new document. This section covers the steps required to create a new document.

1.0.0 From templates

The most common way to start a new document is from a template. A template is a special version of a Word document with specific settings, such as margins, spacing, etc. It can also have text and graphics. For example, it might have a company name and logo for a letter template. The main thing to know about a template is that when opened, via the New command, a copy of the document is what is opened. This prevents the template from getting altered unintentionally.

Create a new document from a template:

1. Open Word (covered in the previous chapter)
2. Select a template by:
 - a. Click a template shown across the top, Blank document is most common
 - b. Or, Click More Templates to see more purpose-specific options
3. Save the new document
 - a. Provide a file location and name



Create new document from template

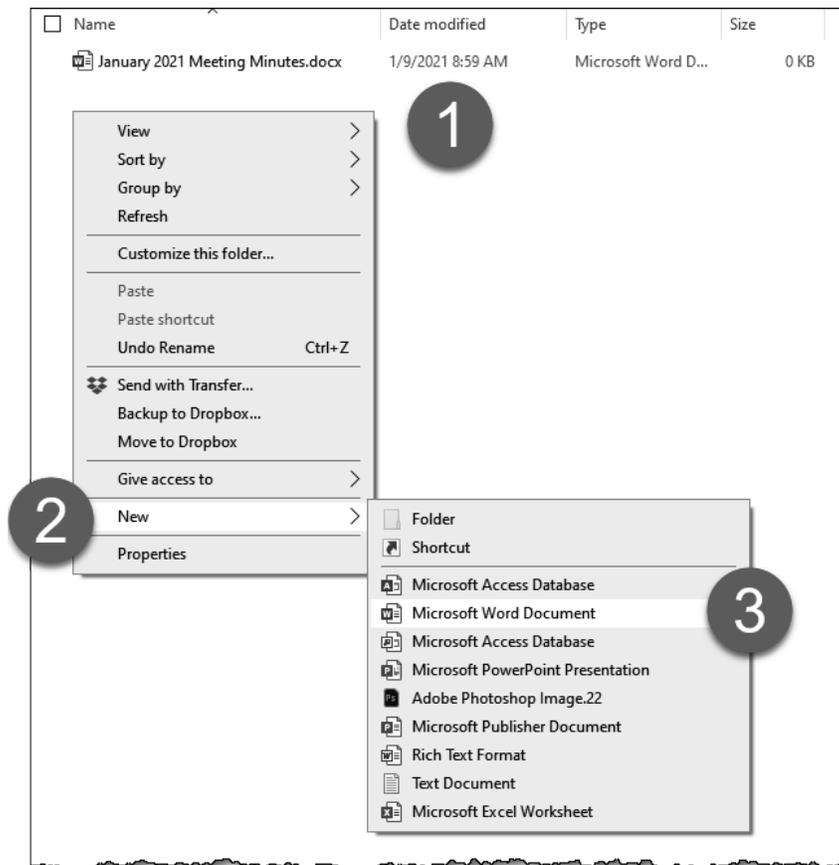
1.0.1 From right-click in File Explorer

It is possible to create a new document outside of Word, within File Explorer. This method uses the Blank document template.

Tip: An easy way to open Microsoft Windows **File Explorer** is by the following keystrokes on the keyboard: **Windows key + E** (just press the two keys at the same time).

Create a new document from right-clicking within File Explorer:

1. Within File Explorer, **right-click** in a blank area within a folder.
2. Click **New** in the menu.
3. Select **Microsoft Word Document**
 - a. Provide a file name



Create new document from right-click in File Explorer

File extensions:

When opening Word documents, looking at its files on your computer, or preparing to copy them, it is helpful to know what the two *main* file extensions are.

- Word document filename.**docx**
- Word template filename.**dotm**
- Legacy document filename.doc (*97 – 2003)
- Legacy template filename.dot (*97 – 2003)

Note: By default, file extensions may not be showing within **File Explorer**. If desired, they may be turned on within File Explorer via View (tab) → Options → Change folder and search options → View (tab in dialog) → (uncheck) Hide extensions for known file types.

1.1 Navigate within documents

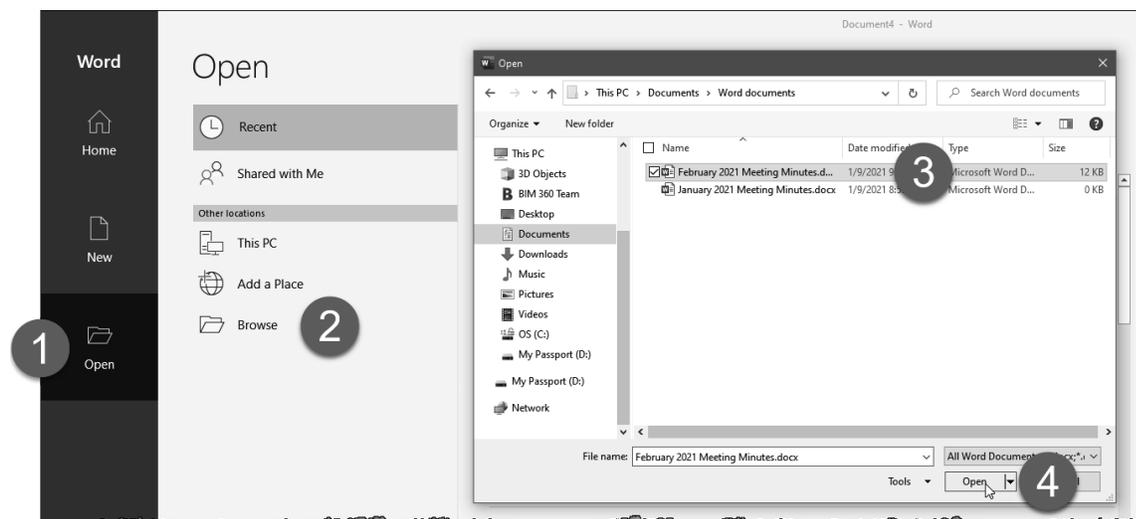
Knowing how to navigate within a document is important for efficiency and accuracy.

1.1.0 Open existing documents

Here are the steps to return to a previously created document.

Open an existing document:

1. Start Word, and then click **Open** on the left panel
2. Click **Browse**
3. In the Open dialog, browse to your document location, and **select it**
4. Click **Open**



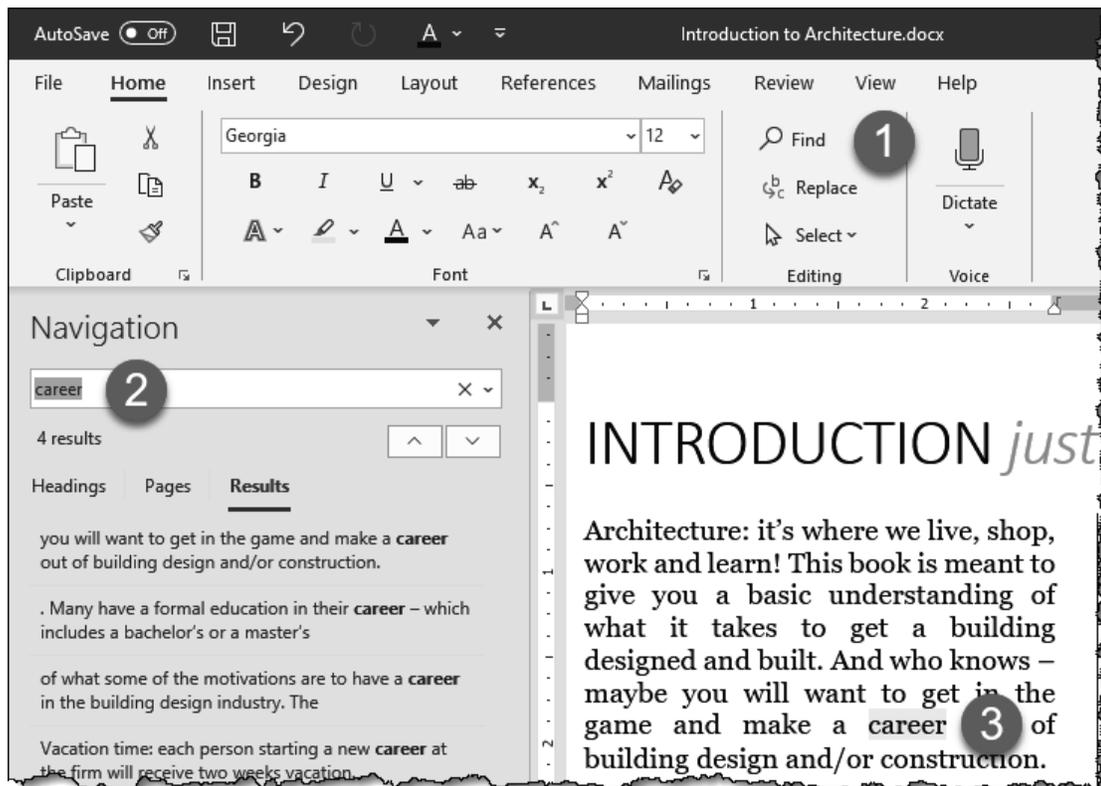
Open a previously created document

1.1.1 Search for text

Use the Find tool to search for text within the current document. The results, if any, are highlighted within the document and appear in context within the Navigation pane as shown in the image below. Clicking on one of the results listed will jump to that location.

Search for text using Find: 

5. **Home** → **Find** (or **Ctrl+F**)
6. Enter text to search for, e.g. “career,” and press Enter
7. The results are highlighted in the document



Search for text using Find

To search for text based on case, whole word and more, use Advanced Search.

Search for text using Advanced Find: 

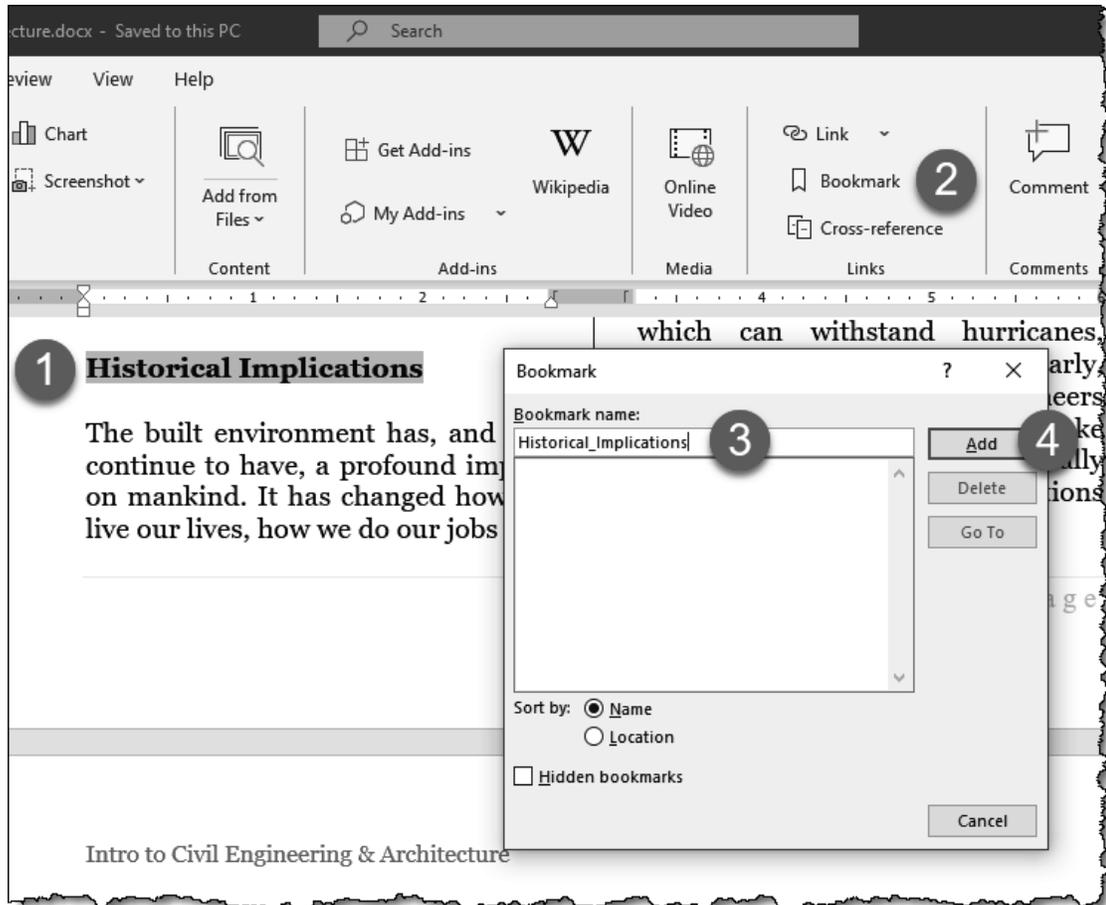
1. **Home** → **Find** → **Advanced Find...**
2. Enter text to search for, e.g. INTRODUCTION
3. Check desired options, e.g. Match case
4. Click the **Find Next** button: *each click advances to the next instance in the document*

1.1.2 Link to locations within documents

Use the link tools to create a bookmark and cross-reference within documents.

Insert a bookmark: 

1. Select text or click a location
2. **Insert** → **Bookmark**
3. Enter a name; *spaces are not allowed*
4. Click **Add**

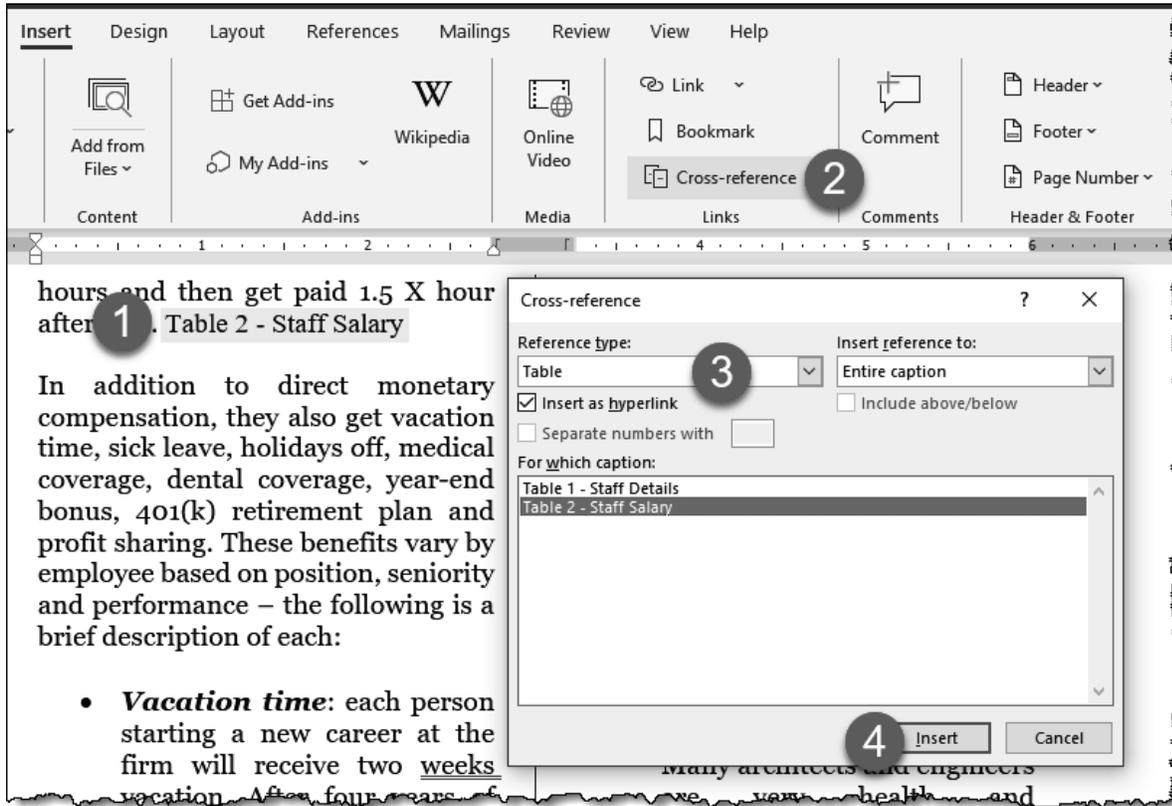


Add a bookmark

Insert a Cross-Reference: 

1. Click a location
2. **Insert** → **Cross-Reference**
3. Select
 - a. Reference type: *bookmark, table, etc.*
 - b. Caption: *captions must already exist in document*
4. Click **Insert**

Use Ctrl+Click to jump to referenced data. Right-click link and Update Field if caption changes.

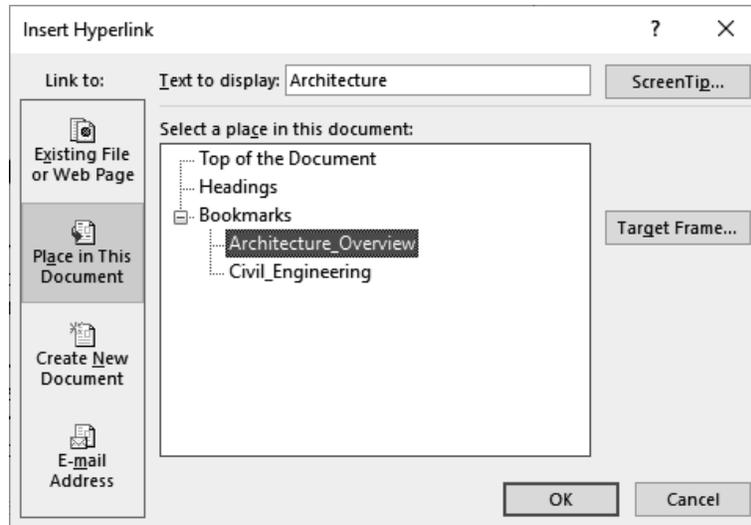


Add a cross-reference

Insert Hyperlink to a Place in This Document

It is also possible to use a hyperlink to link to another location within the same document.

1. Select text
2. Right-click
3. Select **Link...**
4. Click **Place in This Document**
5. Select an option: Headings or Bookmarks



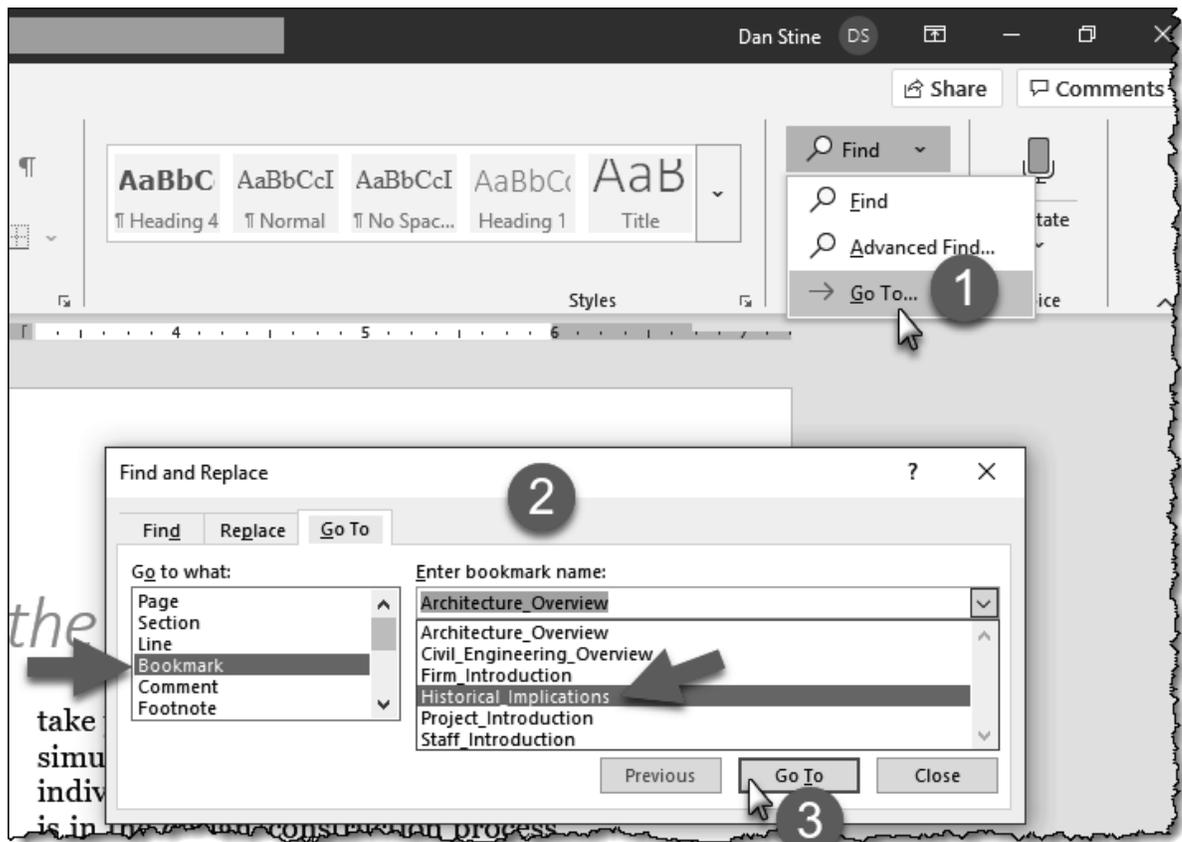
Link within document

1.1.3 Move to specific locations and objects in documents

Review the steps used to quickly jump to another location within the current document.

Use Go To: 

1. Home → Find (drop-down) → Go To... (or Ctrl+G)
2. In the Find and Replace dialog:
 - a. Reference type: *bookmark, table, etc.*
 - b. Reference name: *reference must already exist in document*
3. Click **Go To**



Jump to a bookmark location using Go To

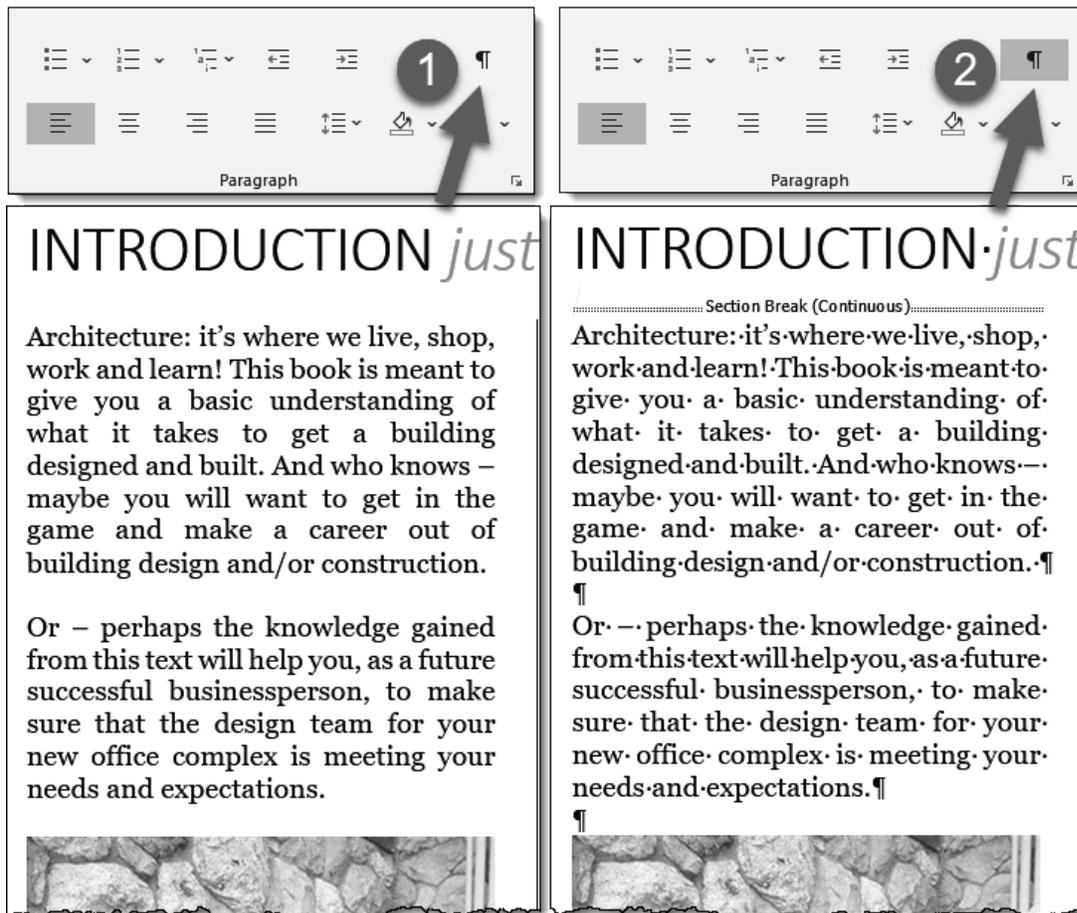
1.1.4 Show and hide formatting symbols and hidden text

Show paragraph marks and other hidden formatting symbols, which help with page layout.

Use Show Hide ¶: 

1. Home → ¶ (or Ctrl+*) to toggle on
2. Repeat step #1 to toggle off

█ The keyboard shortcut is actually **Ctrl + Shift + ***



Toggle paragraph and hidden formatting symbols on and off

█ In the context of Word, and the certification exam, each “paragraph symbol” defines a paragraph. For example, the exam may provide instruction on inserting something in the last paragraph. The last paragraph may not have any text associated with it, so be sure to toggle on the “paragraph symbol” visibility to make it easy to follow the instructions.

1.2 Format documents

Controlling formatting of a document is an important aspect of using Microsoft Word.

1.2.0 Moving the cursor around within document

In addition to moving to specific locations within a specific document, covered in the previous section, there are several efficient techniques to position the cursor within your immediate context. The current cursor location is where text is added then typing on the keyboard, as well as where symbols and graphics are inserted.

There are several ways to reposition the cursor from its current position:

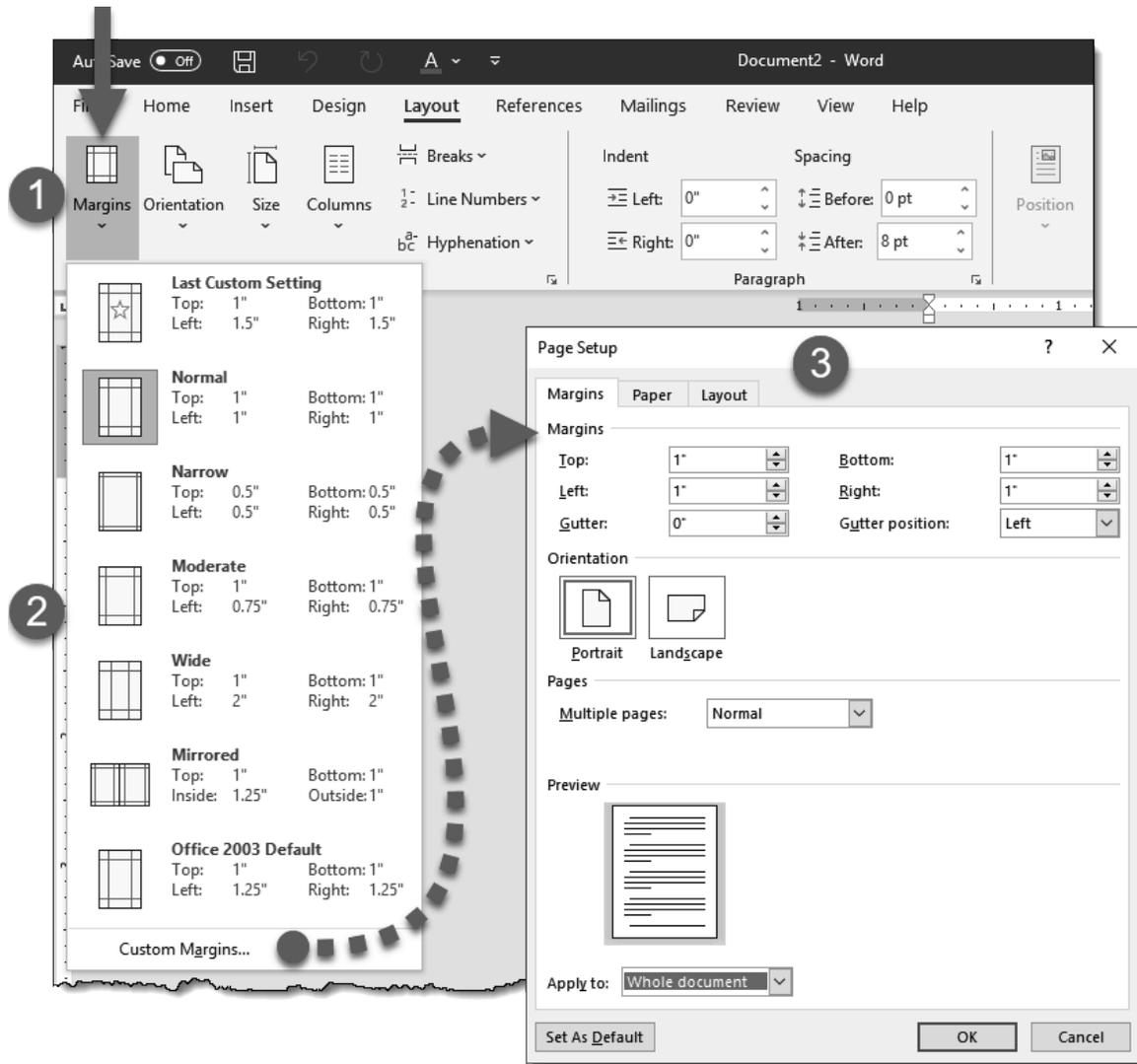
<i>Action</i>	<i>Cursor Result</i>
<i>Click mouse button</i>	Moved to that location
<i>Left Arrow</i>	Move one-character left
<i>Right Arrow</i>	Move one-character right
<i>Up Arrow</i>	Move one line Up
<i>Down Arrow</i>	Move one row down
<i>Ctrl + Left Arrow</i>	Move one word left
<i>Ctrl + Right Arrow</i>	Move one word right
<i>Ctrl + Up Arrow</i>	Move one paragraph up
<i>Ctrl + Down Arrow</i>	Move on paragraph down
<i>Home</i>	Move to beginning of line
<i>End</i>	Move to end of line
<i>Ctrl + Home</i>	Move to beginning of document
<i>Ctrl + End</i>	Move to end of document
<i>Page up</i>	Scroll up equal to height of visible page
<i>Page Down</i>	Scroll down equal to height of visible page
<i>Ctrl + Page Down</i>	Move to beginning of previous page
<i>Ctrl + Page Down</i>	Move to beginning of next page

1.2.1 Set up document pages

To define how a page looks, adjust the Margins, Orientation and Size. The Page Setup dialog has an array of options used to control how a page appears and prints to PDF or hardcopy.

Margins

Most printers cannot print to the edge of the page. Thus, margins are used to define the non-printable area at the perimeter of the page. To set margins: simply select from the predefined list on the **Layout** tab or click **Custom Margins...** to access the **Page Setup** dialog.

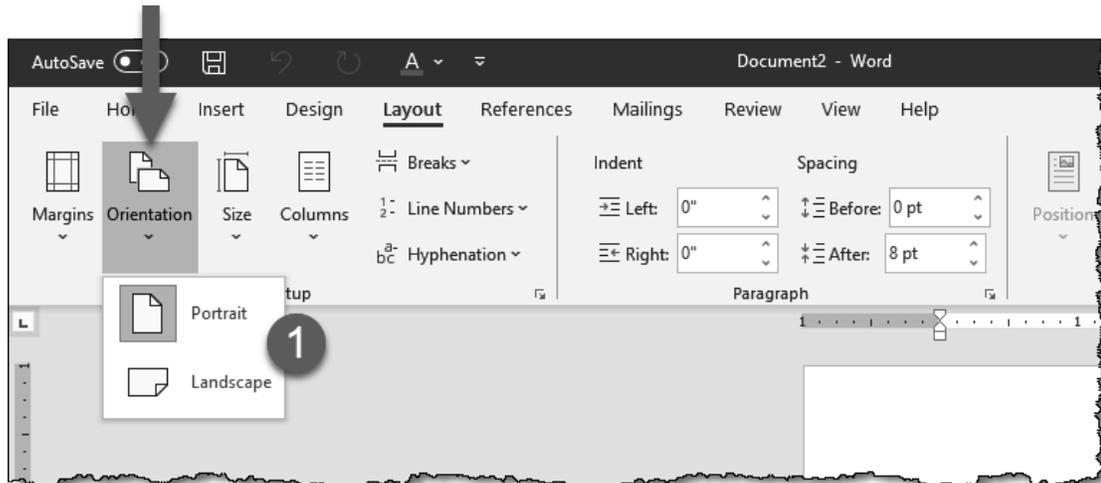


Setting margins for a page

Orientation

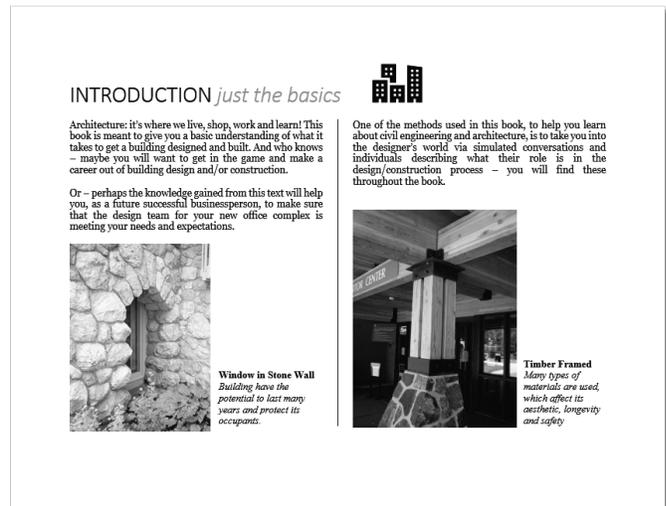
The orientation of a page can either be **Portrait** (vertical) or **Landscape** (horizontal) as shown below. Deciding which to use can be a personal preference, company standard or required based on the information (text and graphics) to be presented.

1. Layout → Orientation → Portrait *or* Landscape



Setting orientation for a page

Changing the orientation of a non-empty page may require some reformatting. In the example below, notice the image captions have moved and one page has more white space.

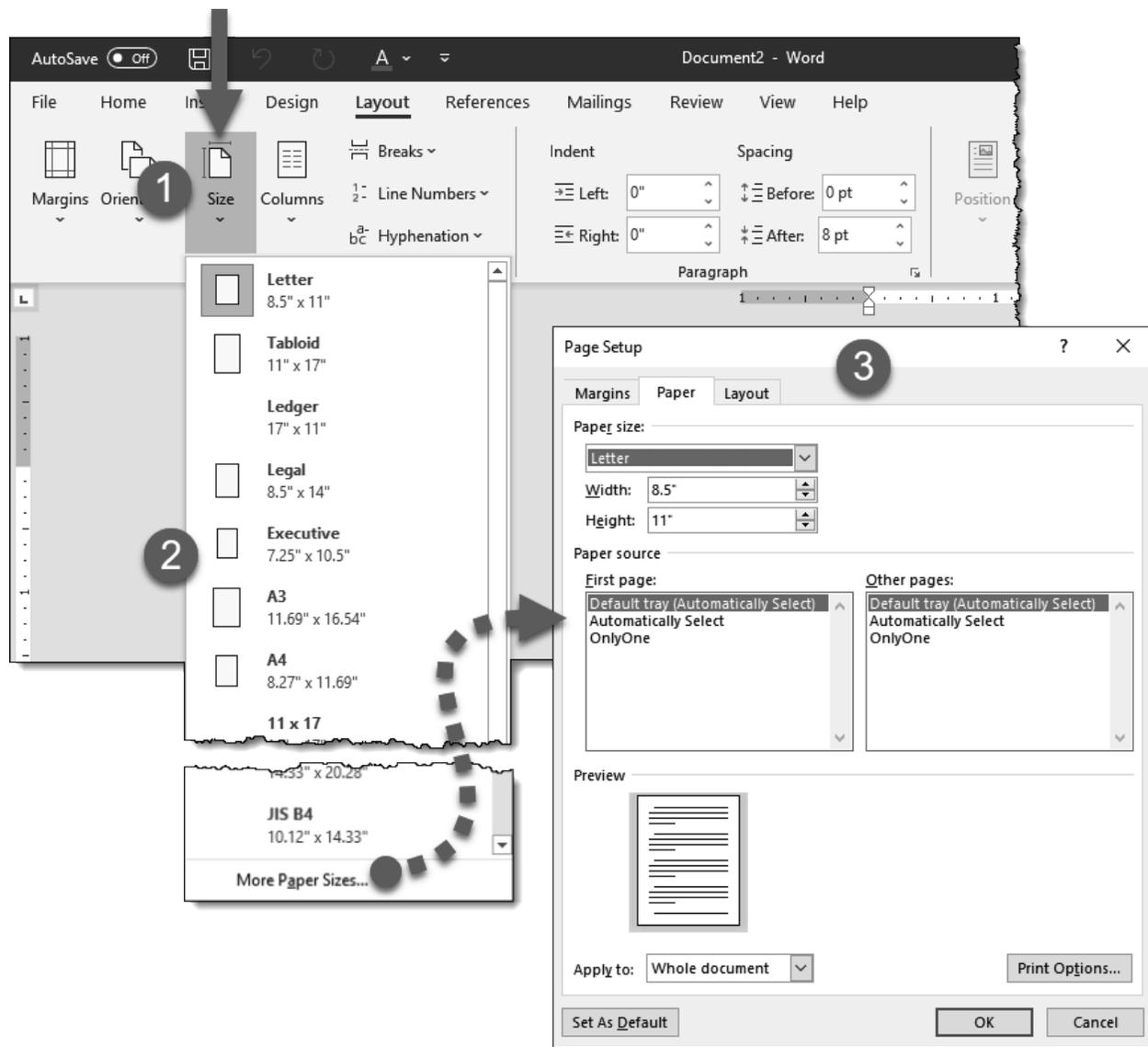


Comparing portrait (left) and landscape (right) page layouts

Size

The size of the page (aka paper) is set on the Layout tab.

1. **Layout** → **Size** (drop-down list)
2. Select an option:
 - a. Pick from predefined list of page sizes, *or*
 - b. Select **More Paper Sizes...** to open Page Setup dialog
3. Enter custom page size (optional)
 - a. Allowable range is **0.1” – 22”**, thus, 22” x 22” is the largest page possible

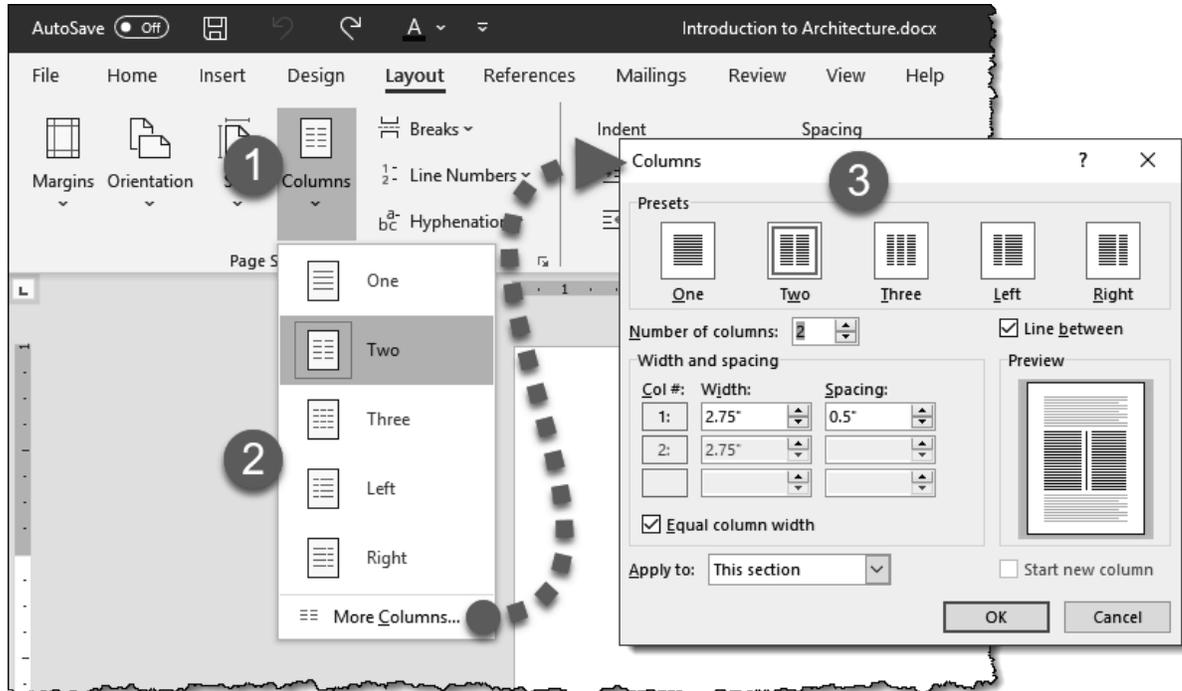


Setting paper size

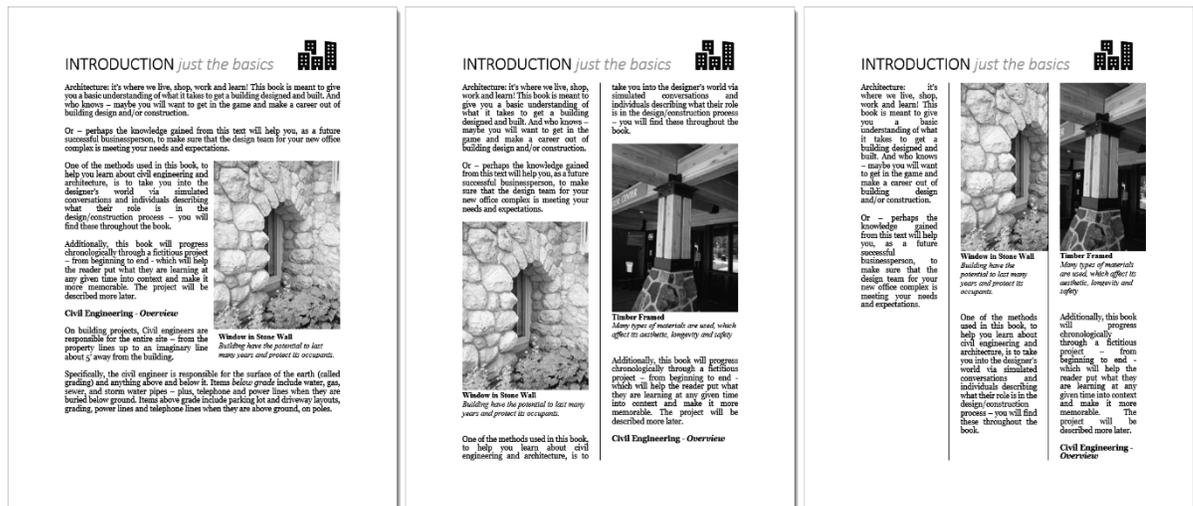
Columns

Define the number of columns from the Layout tab.

1. **Layout** → **Columns** (drop-down list)
2. Select an option:
 - a. Pick from predefined list, *or*
 - b. Select **More Columns...** to open Columns dialog
3. Specify Column options (optional)



Setting number of columns



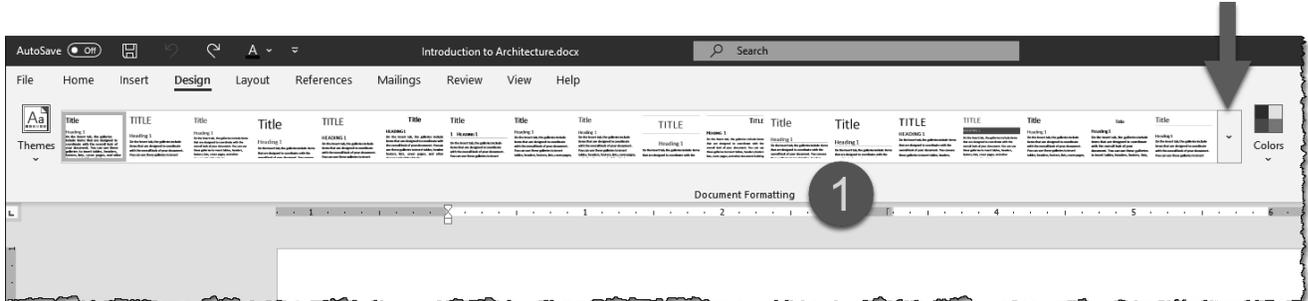
Comparing page layout for one, two and three columns

1.2.2 Apply style sets



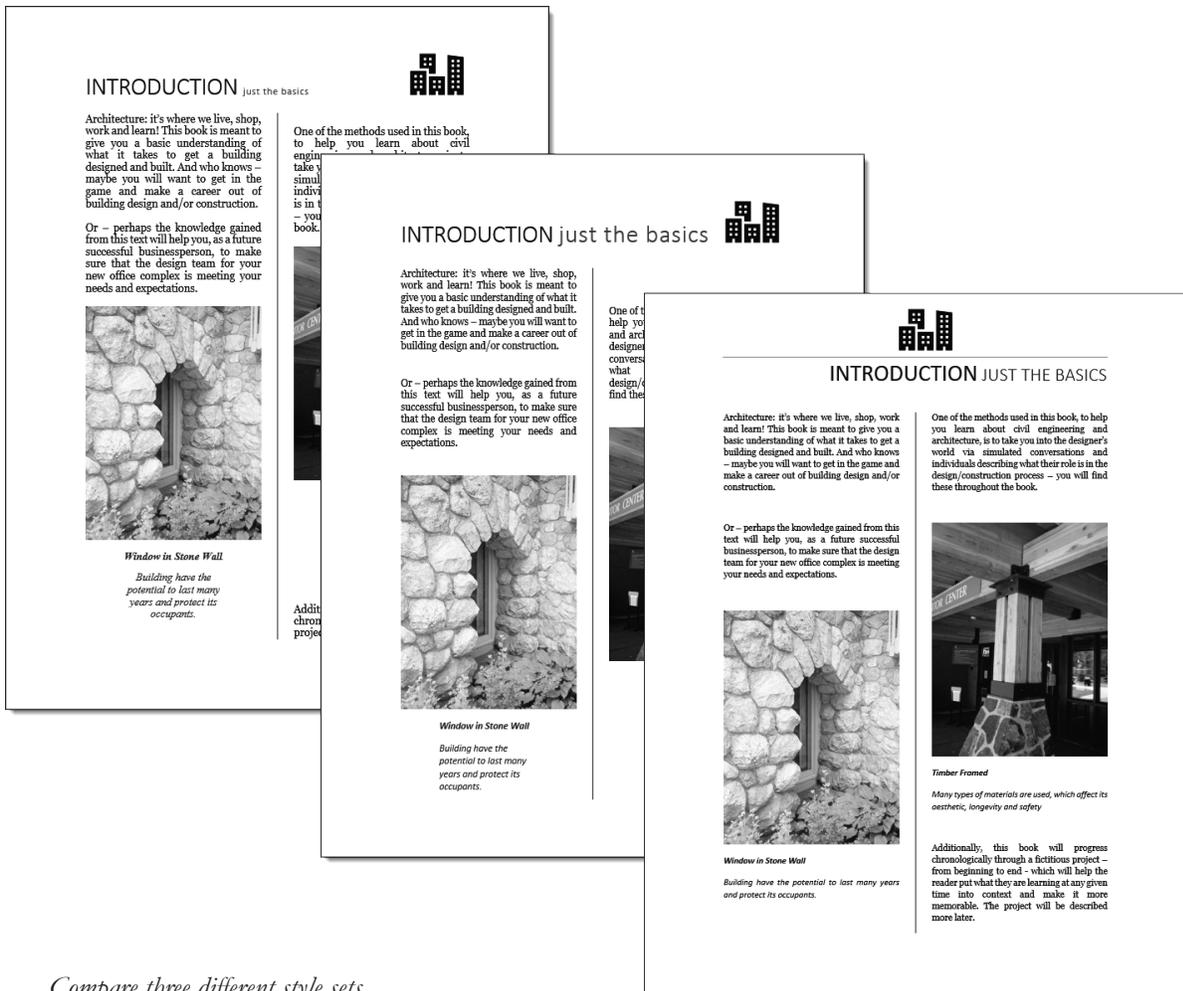
Applying a style set can quickly change the look of the entire document.

A. Design → Document Formatting gallery (click down-arrow to see full list)



Apply a style set

Three different style set examples are shown below, applied to the same document. Notice the heading, captions and even the main body text style and formatting change.

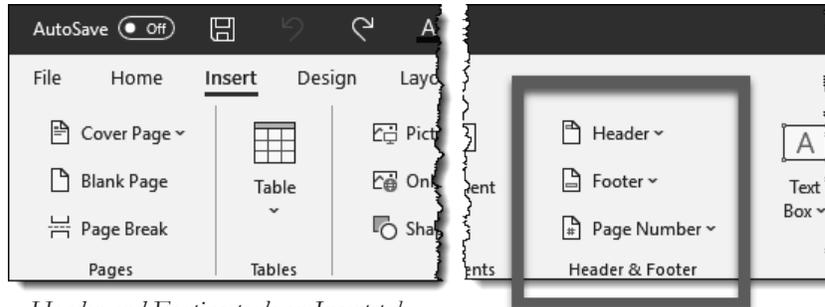


Compare three different style sets

1.2.3 Insert and modify headers and footers



Use headers and footers to display information to be repeated on each page, such as page number, chapter title and more. The related tools are found on the Insert tab.



Header and Footing tools on Insert tab

A) Insert Header

1. **Insert** → **Header** (list)
2. Select option:
 - **Built-in** option, *or*
 - Custom via **Edit Header**

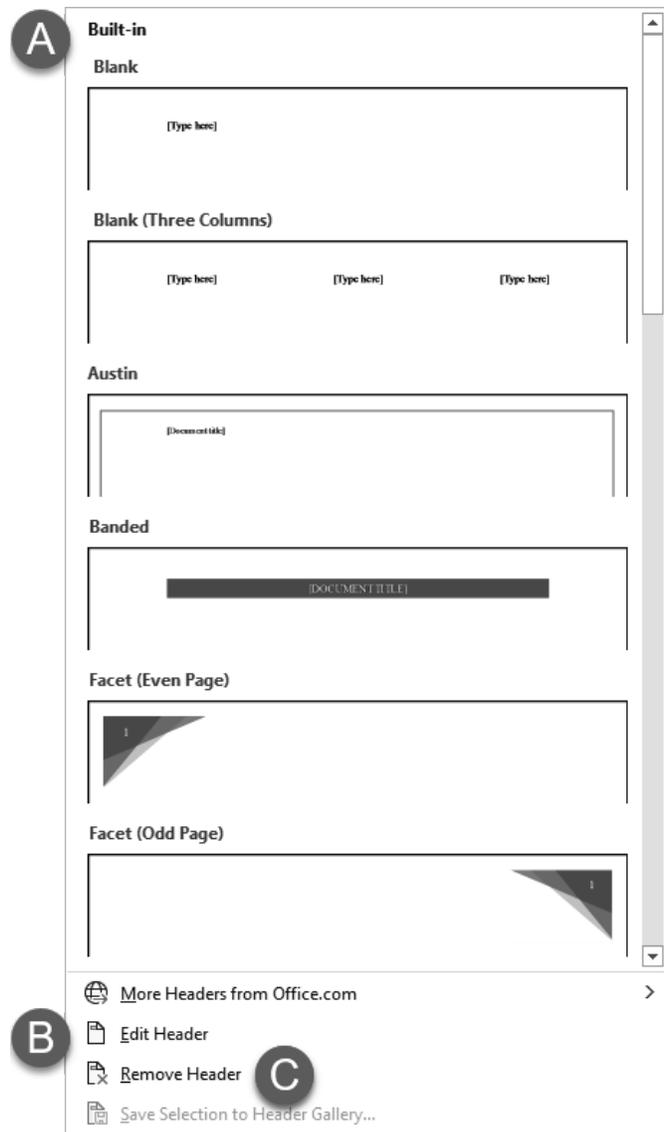
B) Modify Header

1. **Insert** → **Header** (list)
2. Edit Header

C) Delete Header

1. **Insert** → **Header** (list)
2. Remove Header

The previews, for the built-in options shown to the right, are how they will appear when applied to your document. Often, it is more efficient to select a built-in option and then edit it, rather than starting a new one from scratch.



Header tools

A) Insert Footer

1. **Insert → Footer** (list)
2. Select option:
 - **Built-in** option, *or*
 - Custom via **Edit Footer**

B) Modify Footer

1. **Insert → Footer** (list)
2. Edit Footer

C) Delete Footer

1. **Insert → Footer** (list)
2. Remove Footer

Ribbon Options

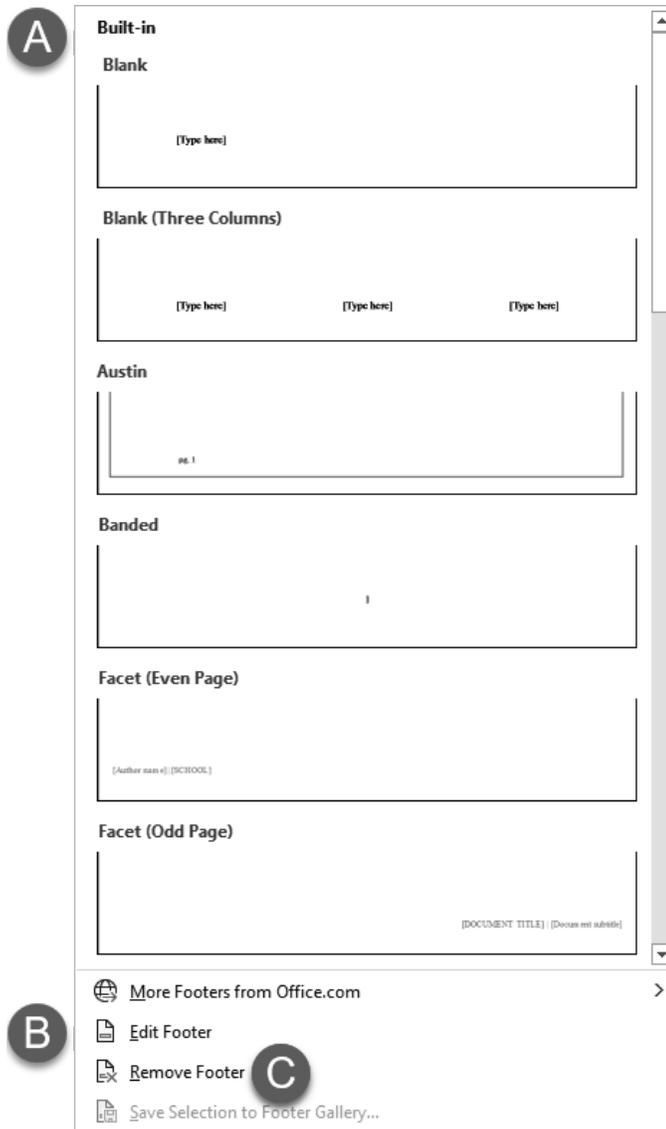
While in ‘edit mode’ for a header/footer, the Ribbon has some related options as shown below. These tools are also found in Page Setup.

- Different odd and even:

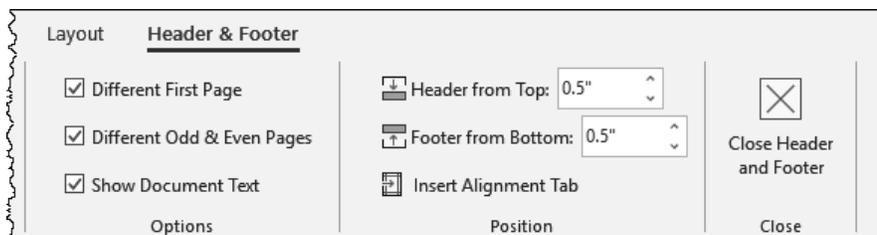
For example, chapter title on one page and the book title on the next.
- Different first page:

Unique first page, which could mean no header/footer at beginning of chapter.
- From Edge:

Moves header/footer relative to edge of page but does not affect the margins.



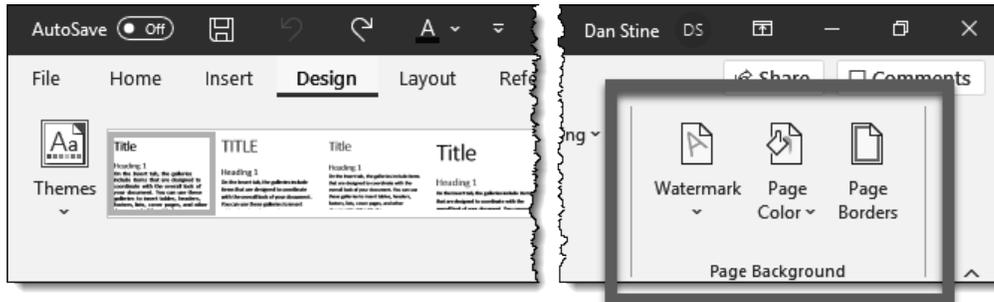
Footer tools



Ribbon tools while in header/footer edit mode

1.2.4 Configure page background elements

Review how to control the background color, text and page borders from the Design tab.



Page background tools on the design tab

Watermark

A watermark is text or an image that is transparent and is positioned behind the content in your document.

A) Insert Watermark

1. **Design** → **Watermark** (list)
2. Select option:
 - **Built-in** option, *or*
 - Custom via **Custom Watermark**

B) Custom Watermark

1. **Design** → **Watermark** (list)
2. Custom Watermark...
3. Printer watermark dialog (see next page)
 - Picture watermark: *browse for image*
 - Text watermark: *enter custom text*

C) Delete Watermark

1. **Design** → **Watermark** (list)
2. Remove Watermark



Watermark tools



Custom watermark settings

Page Color

Selecting a page color fills the entire page background with that color.

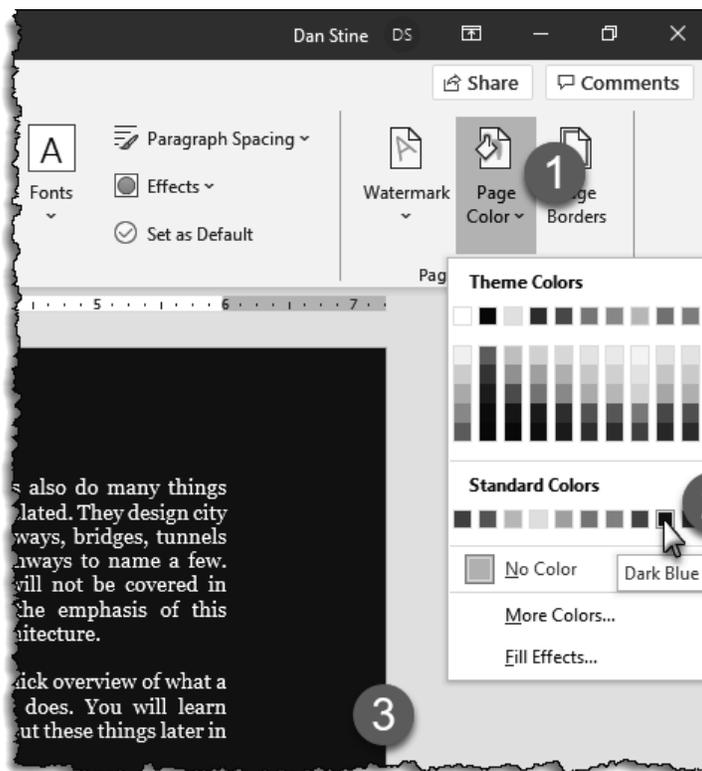
Set Page Color

1. **Design** → **Page Color** (list)
2. Select option:
 - **Select a color, or**
 - **More Colors**

Remove Background Color

1. **Design** → **Page Color** (list)
2. **No Color**

Note: By default, background colors/images do not print. This may be changed here: **Options** → **Display** → **Printing options**: *Toggle*, **Print background colors and images**.



Set Page Color

Page Borders

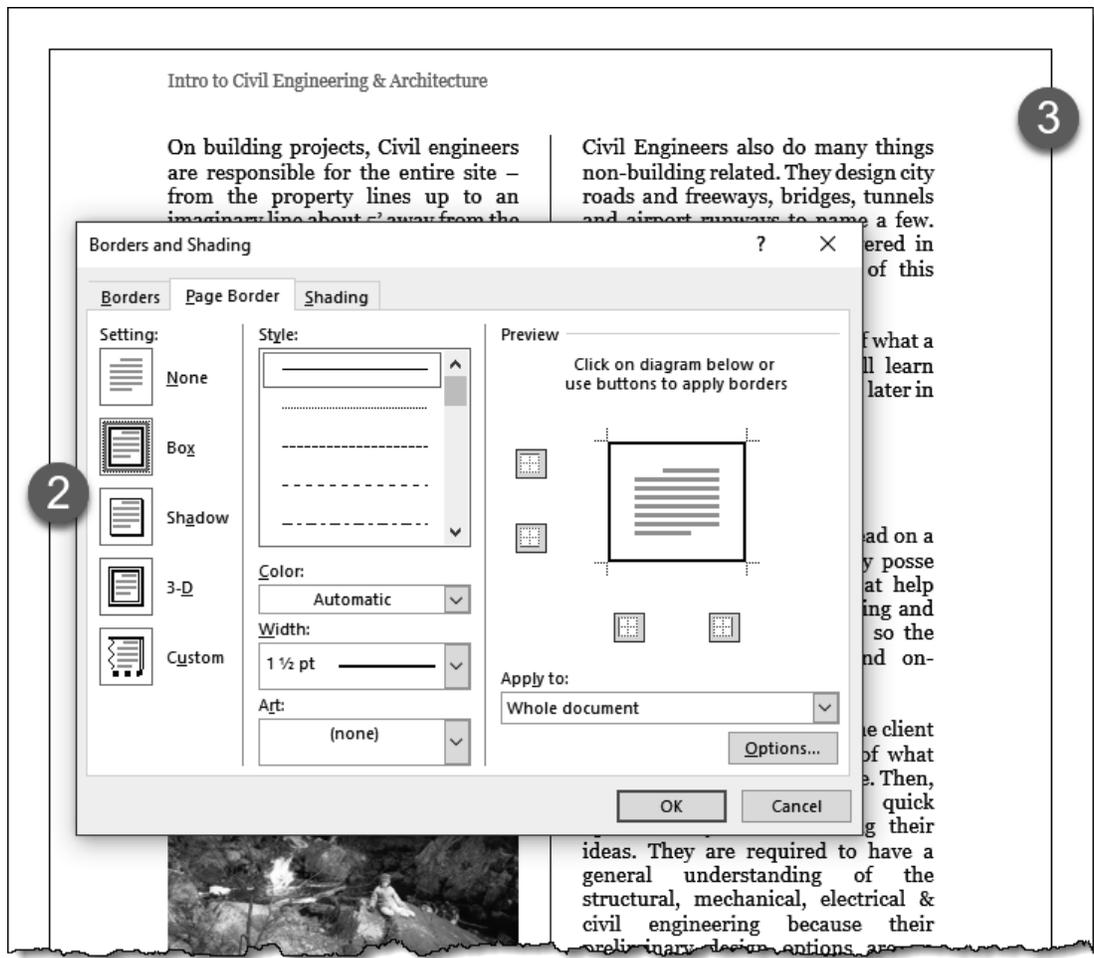
Add a border to frame a page. The border is added within the margins, so they print.

Define a Page Border

1. **Design** → **Page Borders**
2. Select option:
 - Select a **Setting**, e.g. None, Box, Shadow, 3-D
 - Pick a line Style, Color, Width and/or Art option.
 - Preview area: pick one or more edges to toggle the border on/off

Remove Page Border

1. **Design** → **Page Border**
2. Click **None** (setting) and then **OK**



Define a page border

1.3 Save and share documents

Word documents may be shared directly, by saving to an alternative format and/or printing. This section will cover these options.

1.3.0 Save and close documents

It is important to save document edits before closing it, to ensure work is not lost. Word will prompt to save if a document with unsaved changes is being closed.

Documents may be saved manually or in real-time via AutoSave.

AutoSave document

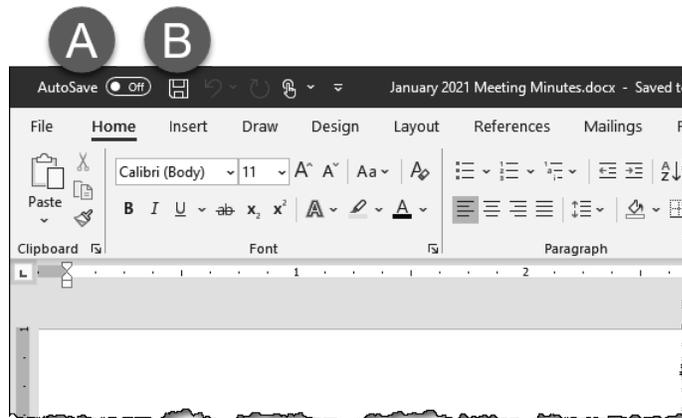
1. On the application titlebar, toggle **AutoSave** on

Tip: Use caution when opening a document with the intention of making a copy. Use Save-As right away to avoid editing the original document.

Save document

2. On the application titlebar, click the Save icon to commit changes to storage.

Tip: Use Ctrl + S as another efficient way to save the current document.



AutoSave and Save

Note: Documents opened from one of Microsoft’s cloud-storage locations, such as OneDrive or SharePoint, will default to AutoSave mode.

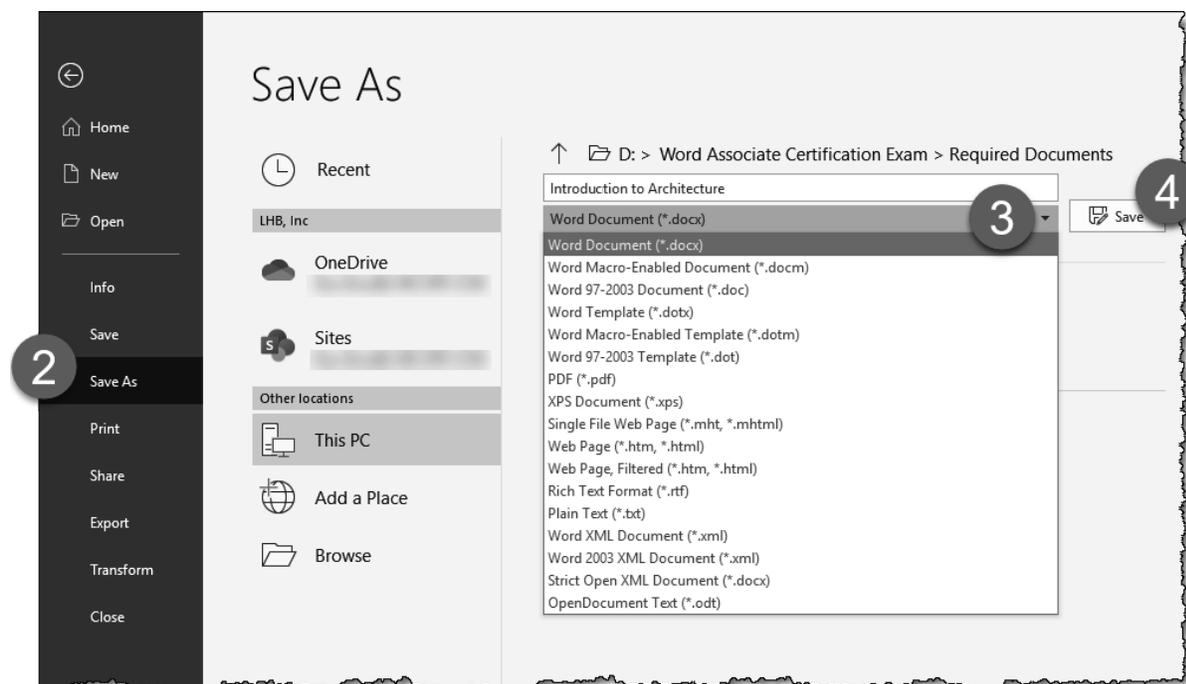
1.3.1 Save documents in alternative file formats

A Word document may be saved in several alternative formats, from legacy version of Word, for backwards compatibility, or a new Word template file for new documents (with or without macros enabled) to PDF and web page (html) formats to share with others who might not have word. Also, a PDF file preserves formatting and prevents editing.

Save document in alternate file format



1. Click the **File** tab on the Ribbon
2. Select **Save As**:
3. Select a file type from the drop-down list
4. Click the **Save** button



Save As options

The result of Save As is a new file, saved adjacent to the original file. To save to a different location, click the Browse button for step #3 and then specify a location, file type in the Save As dialog that opens.

1.3.2 Modify basic document properties

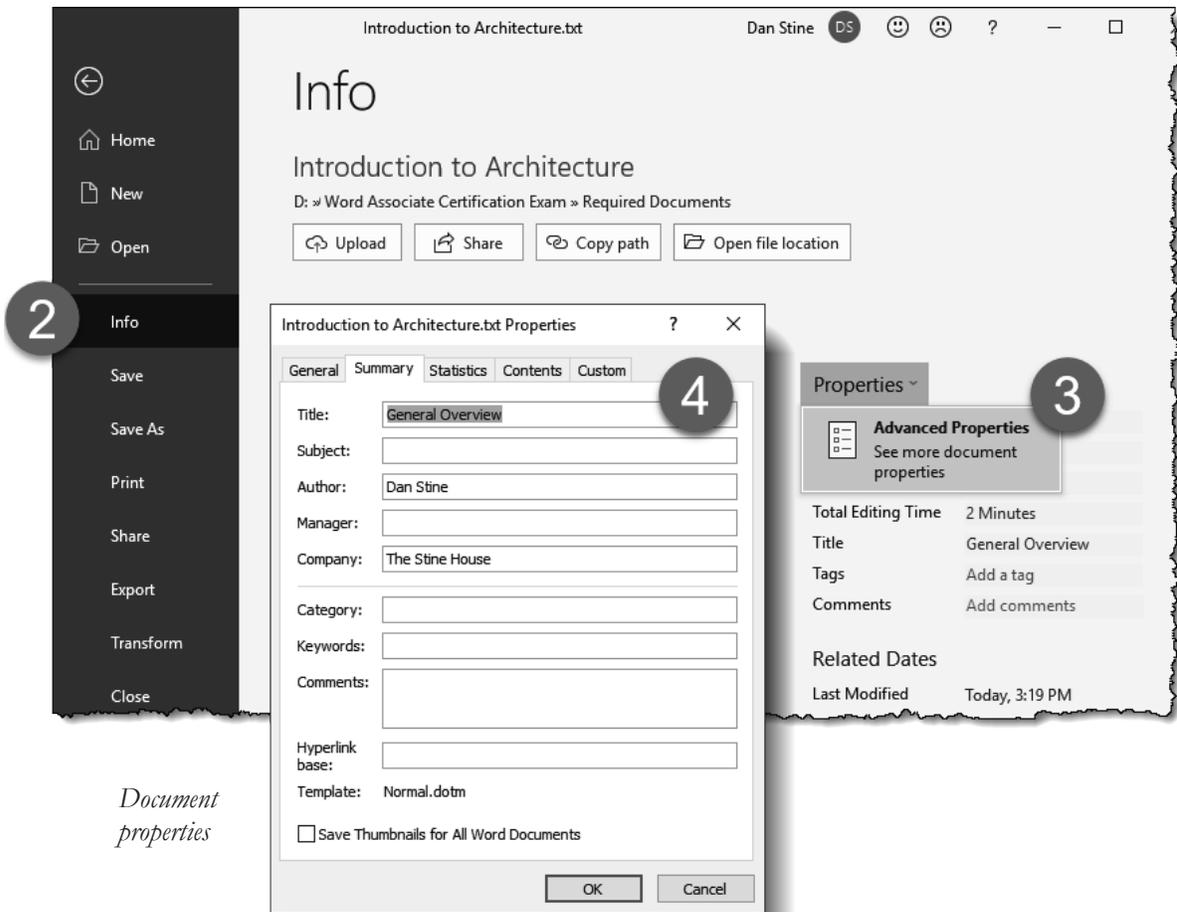
Each Word document has a place to enter unique properties used to track and identify it. These properties are also referred to as metadata and may be viewed without opening the file.



Modify document properties

1. Click the **File** tab on the Ribbon
2. Select **Info**
3. Select the **Properties** drop-down list and click **Advanced Properties**
4. Modify the document properties in the open dialog

When finished, to save the changes and return to the document, click the OK button and then the left-pointing arrow (in a circle) in the upper left



Document properties

This information can be made visible via Window’s **file explorer** as shown here for “Authors”.

Name	Date modified	Type	Size	Authors
Introduction to Architecture.docx	9/23/2019 11:04 AM	Microsoft Word Document	1,654 KB	Dan Stine
Introduction to Architecture.txt	10/27/2019 3:19 PM	Text Document	18 KB	

Column added to windows explorer to show author info from files listed

1.3.3 Modify print settings

Before sending a document to the printer, there are several settings which can be modified to change the layout and look of the printed page or PDF file.

Modify print settings

1. Click the **File** tab on the Ribbon
2. Select **Print**
3. Modify the print settings as desired

When finished, either click Print to send the document to the selected printer or click the left-pointing arrow, in the upper left, to return to the document.



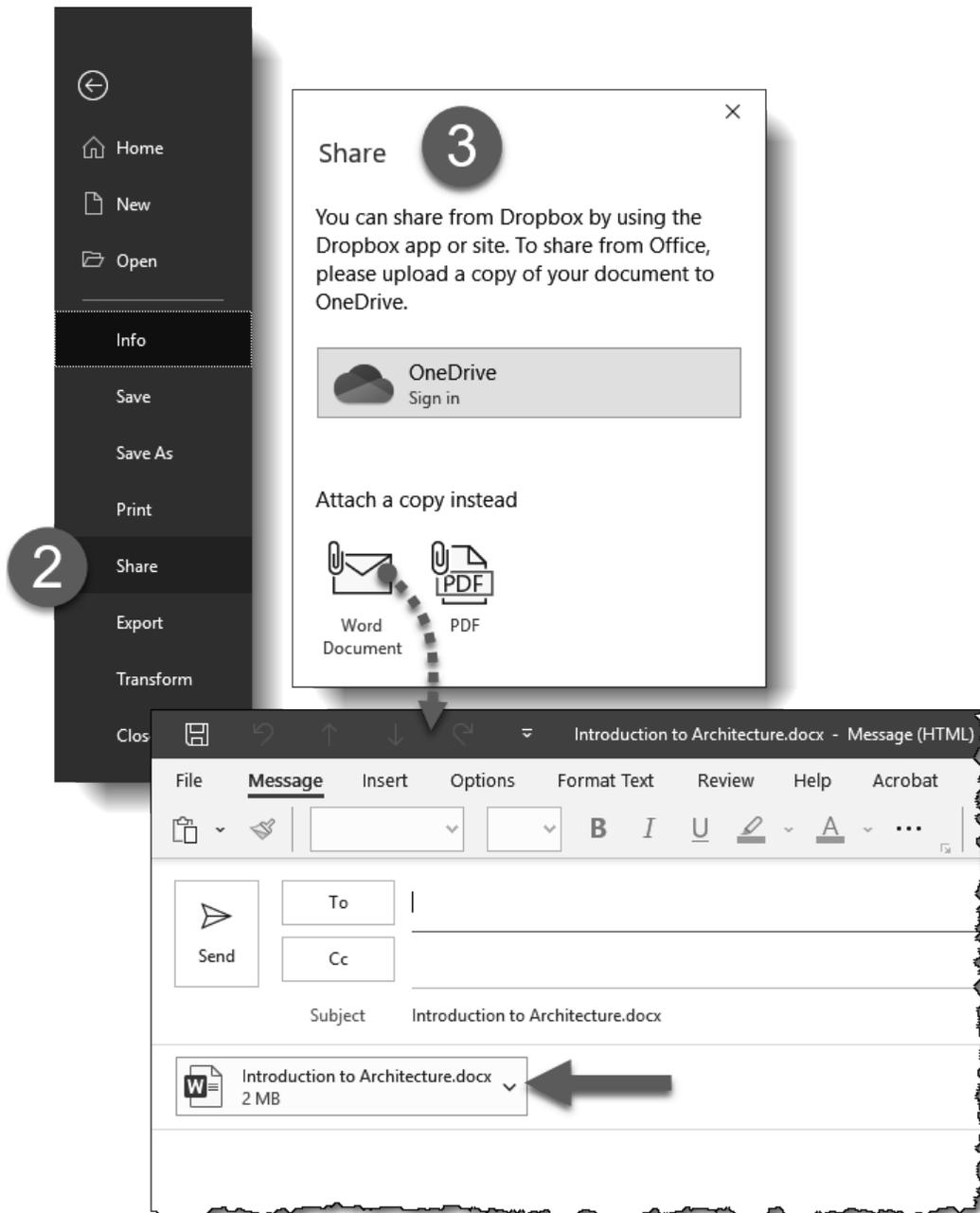
Modify print settings for current document

1.3.4 Share documents electronically

Files can be shared electronically via OneDrive (cloud storage) or as an email attachment.

Share document electronically

1. Click the **File** tab on the Ribbon
2. Select **Share**
3. Select an option:
 - a. OneDrive (cloud storage)
 - b. Email: Word Document
 - c. Email: PDF



Sharing a document electronically

1.4 Inspect documents for issues

Before publishing a document, check to see what personal information it might contain, if it may be difficult for a person with a disability to read, or if it contains any features not supported by older versions of Word.

1.4.0 Spelling and grammar corrections

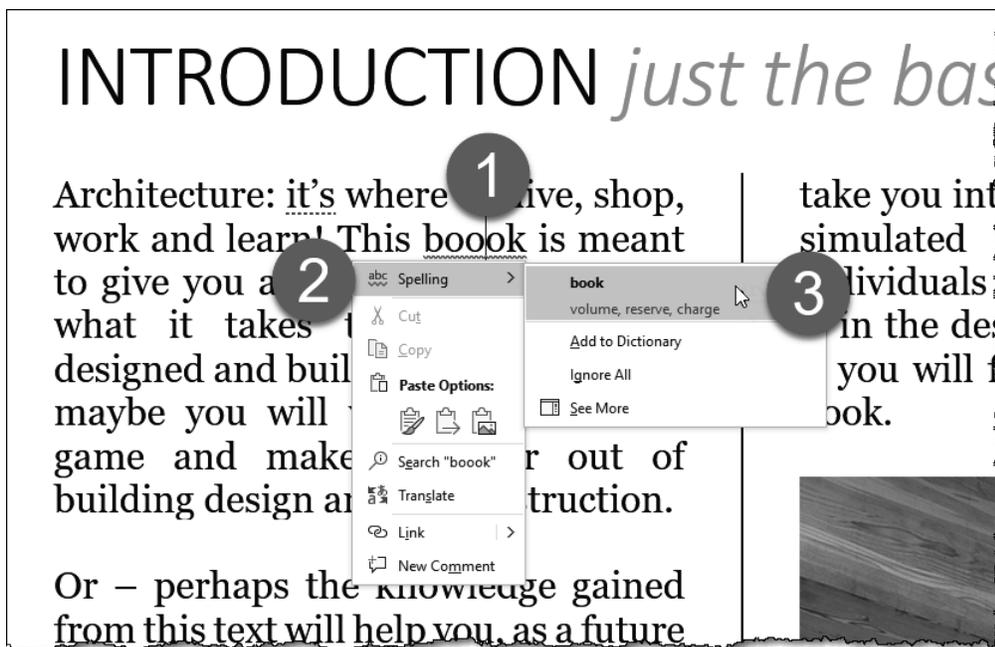
It is important that final documents are free of spelling and grammar errors to avoid confusing the reader. By default, these mistakes are highlighted automatically. They may be corrected as you go, or revisited all at once, later.

Correct spelling errors

Spelling errors are identified by a red wavy underline below the misspelt word.

1. **Right-click** on the misspelt word
2. Hover over **Spelling**, in the menu
3. **Select** the correct spelling for the word in question

Tip: Synonyms are listed below each suggested word.



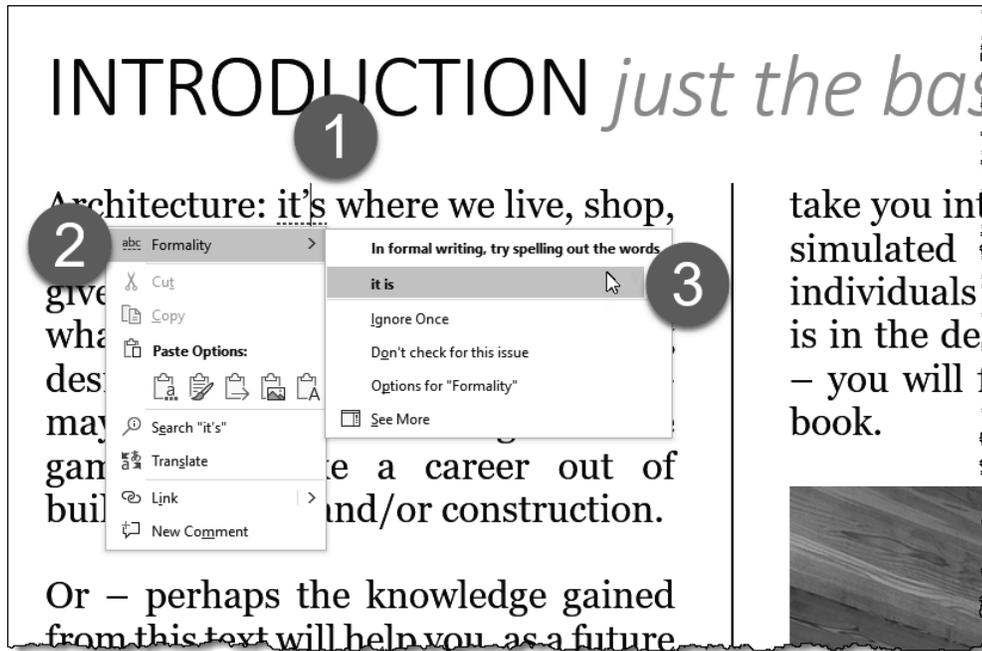
Correct spelling error

When technical, or industry specific, words (e.g. Autodesk, or DropBox) are used, they will be marked as misspelled. Use **Add to Dictionary**, shown above, to avoid this distraction while editing.

Correct grammar suggestions

Grammar issues are identified by a dashed purple line below the misspelt word. Keep in mind that all grammar suggestions are not necessarily errors, or wrong.

1. **Right-click** on the grammar suggestion
2. Hover over **Formality**, in the menu; *word changes depending on type of issue*
3. Select an option if desired; this will change the text under consideration



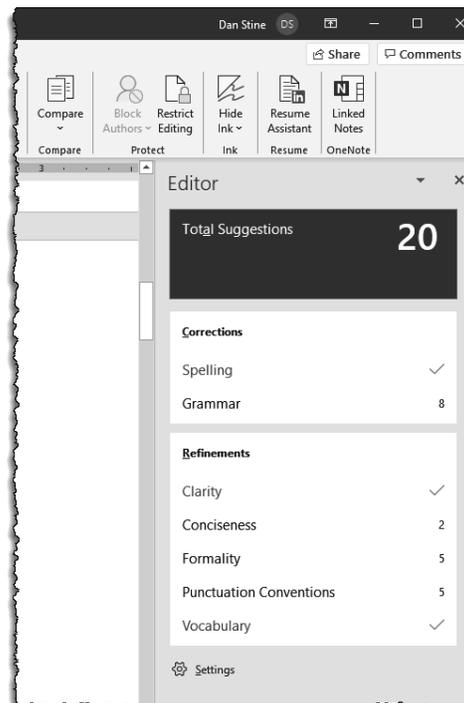
Consider grammar suggestion

Editor panel

The Editor panel is a way to look at all the spelling and grammar suggestions (see image to right). This panel is accessed from the **Editor** command on the **Review** tab.

Notice, the total number of suggestions listed at the top. In this example, there are no spelling errors: green checkmark. However, there are eight grammar issues to consider.

Clicking on the word Spelling or Grammar begins to step through the document to review each issue.



Editor panel – spelling and grammar

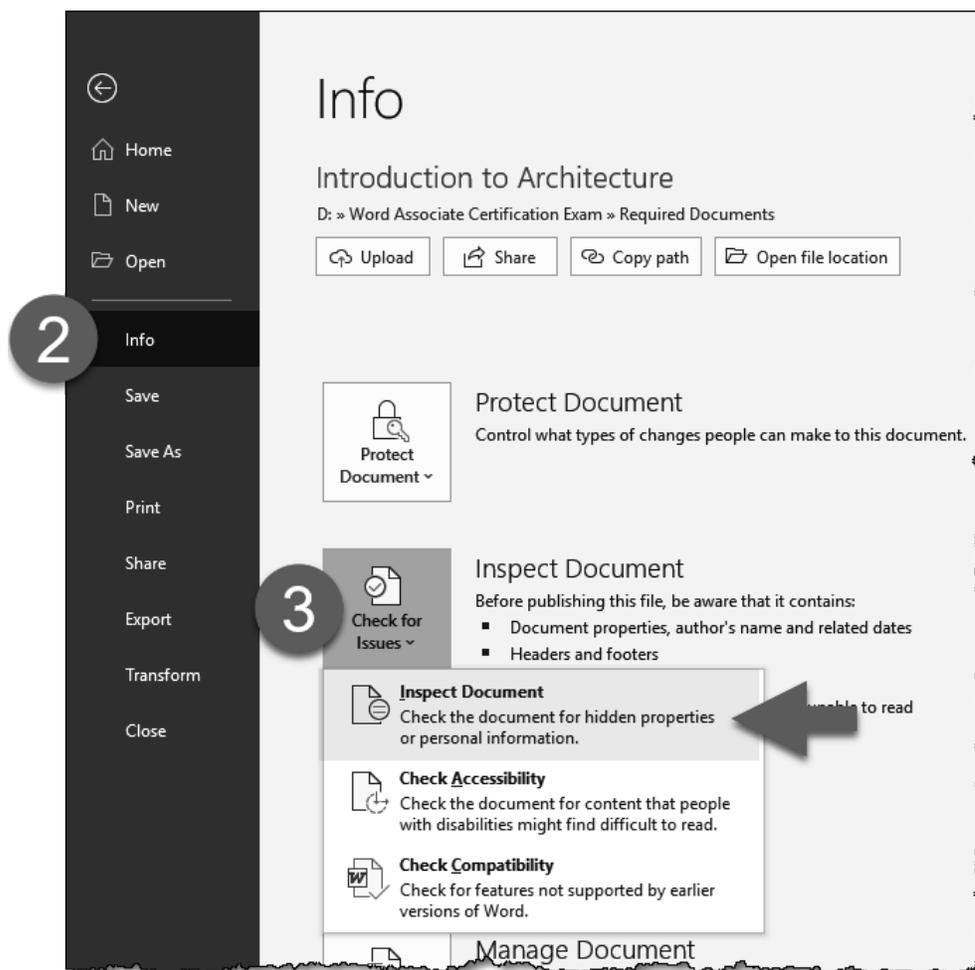
1.4.1 Locate and remove hidden properties and personal information

Check the document for hidden properties or personal information, with an option to 'Remove' for each section reported.

Check for hidden or personal information

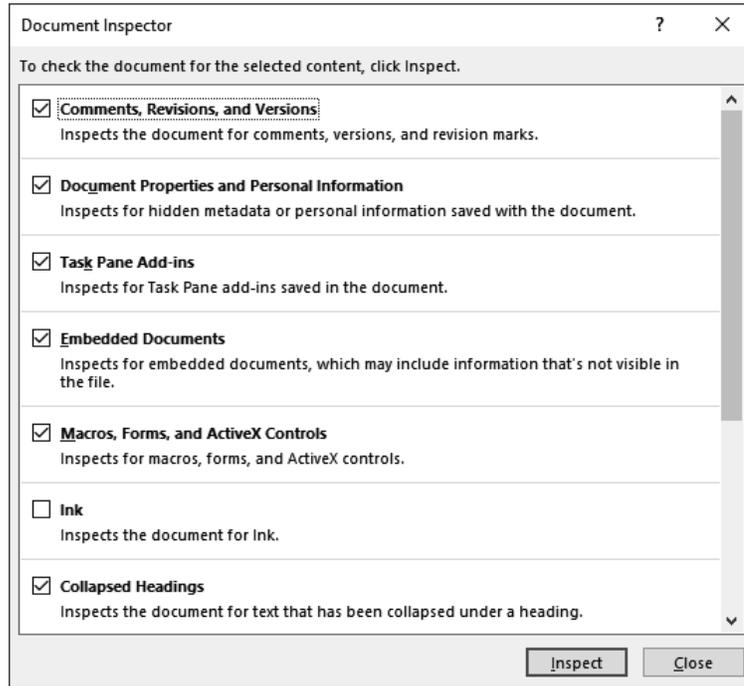


1. Select the **File** tab on the Ribbon
2. Click **Info** on the left
3. Expand the **Check for Issues** list
4. Select **Inspect Document**



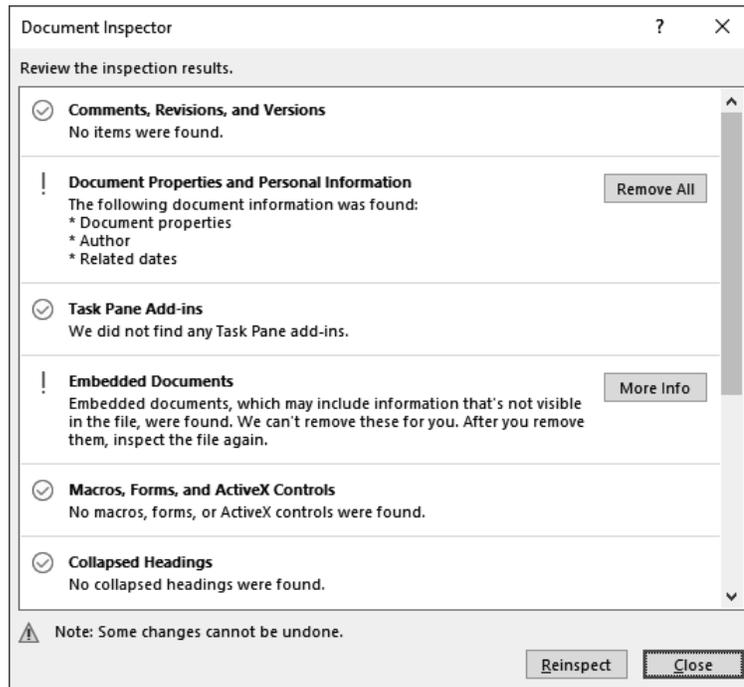
Check for hidden properties or personal information

After clicking Inspect Document, the following dialog is presented. Check the categories to inspect and then click the **Inspect** button.



Document categories to be inspected

A Remove All button appears in each category in which information exists. Click the Remove All button to delete the unwanted data from the document.



Results of inspecting a document's properties

1.4.2 Locate and correct accessibility issues

Check the document for content that people with disabilities might find difficult to read.

Check for accessibility issues



1. Select the **File** tab on the Ribbon
2. Click **Info** on the left
3. Expand the **Check for Issues** list
4. Select **Check Accessibility**
5. Review issues listed in the **Accessibility Checker** panel

The screenshot illustrates the process of checking for accessibility issues in a Word document. On the left, the 'File' tab is active, and the 'Info' option is highlighted with a circled '2'. In the main area, the 'Inspect Document' section is expanded, and the 'Check for Issues' dropdown is open, with 'Check Accessibility' selected, indicated by a circled '4'. To the right, the 'Accessibility Checker' pane is open, showing a list of issues: 'Missing alternative text (4)', 'Image or object not inline (4)', 'Hard-to-read text contrast (3)', and 'No headings in document (1)'. A circled '5' is placed near the bottom of this pane.

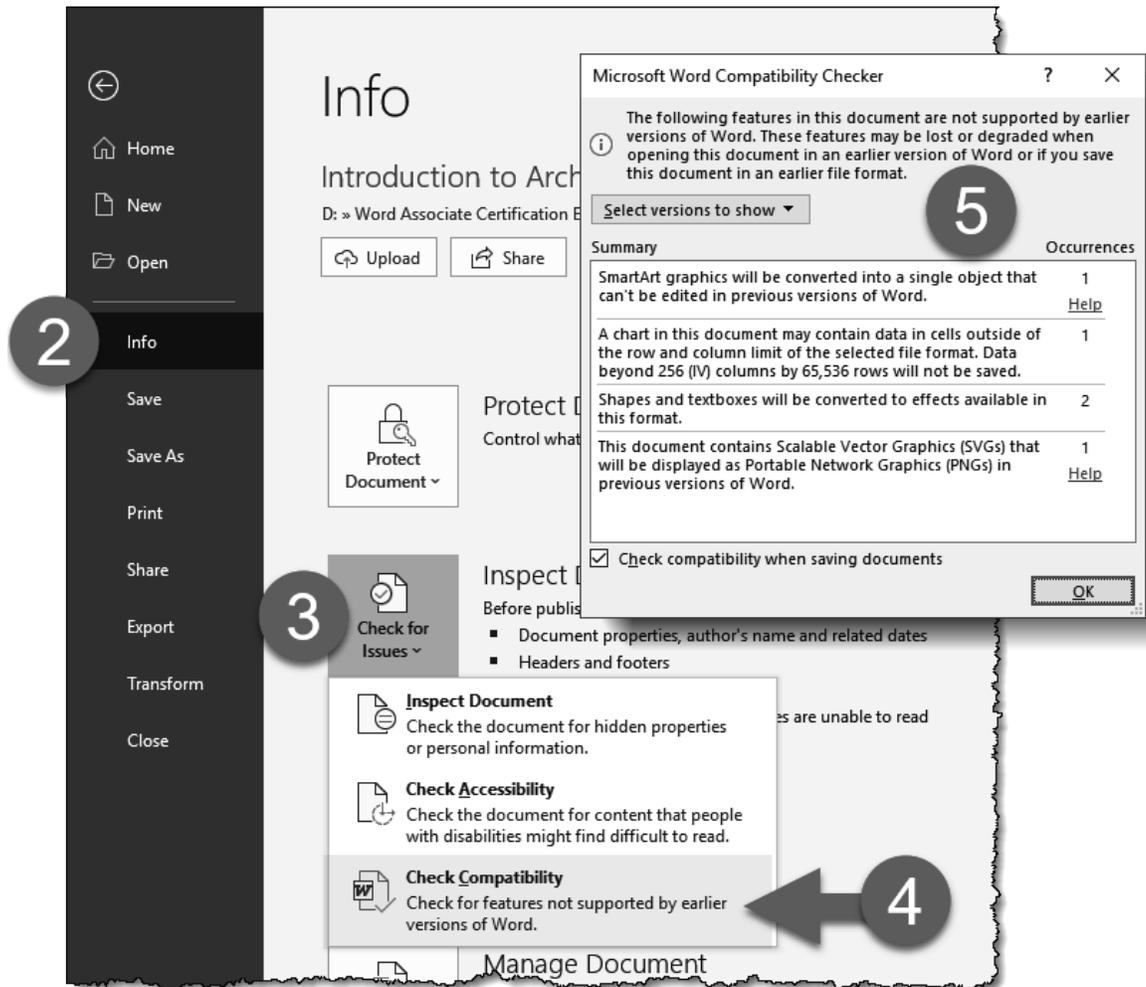
Check for accessibility issues

1.4.3 Locate and correct compatibility issues

Check for features not supported by earlier versions of Word.

Check for compatibility issues

1. Select the **File** tab on the Ribbon
2. Click **Info** on the left
3. Expand the **Check for Issues** list
4. Select **Check Compatibility**
5. Review results



Check for compatibility issues

1.5 Practice tasks

Try the topics covered in this chapter to make sure you understand the concepts. These tasks are sequential and should be completed in the same Word document unless noted otherwise. Saving the results is optional, unless assigned by an instructor.

First Step:

- ✓ Open provided document **Introduction to Architecture.docx**

Task 1.1:

- ✓ **Search** for the word “dental” to quickly locate all three instances of the word.

Task 1.2

- ✓ On page 8, in the list of benefits, add an **internal reference** from the item “Dental Coverage” to the related description on the next page.

Task 1.3

- ✓ Change the **page orientation** to Landscape in Page Setup. The first page will not change.

Task 1.4:

- ✓ Change the document **margins** to the predefined Narrow option.

Task 1.5:

- ✓ Save document in an **alternate file format**; save it as a PDF.

1.6 Self-exam & review questions

Self-Exam:

The following questions can be used to check your knowledge of this chapter. The answers can be found at the bottom of the next page.

1. Word documents are commonly started from templates. (T/F)
2. The file extension for a Word document is .docx. (T/F)
3. The keyboard shortcut to search is Ctrl + S. (T/F)
4. Where is the Go To command found? _____.
5. Three columns are the maximum allowed. (T/F)

Review Questions:

The following questions may be assigned by your instructor to assess your knowledge of this chapter. Your instructor has the answers to the review questions.

1. The command to insert a Bookmark is on the ribbon's View tab. (T/F)
2. Margins can be customized. (T/F)
3. Changing the orientation of a page may require some reformatting of content. (T/F)
4. The largest page possible is 36" x 36". (T/F)
5. The Remove Footer command can be accessed from the Insert tab. (T/F)
6. Word can start a new email with the current document attached. (T/F)
7. Where are the document properties found? _____.
8. Inspect Document helps make the document easier to read for people with disabilities. (T/F)
9. Background colors will always print by default. (T/F)
10. Page Border lines are positioned outside of the margins. (T/F)

SELF-EXAM ANSWERS:

1 – T, 2 – T, 3 – F, 4 – Home\Find\Go To, 5 – F

