

## CHAPTER 1

## InFocus

WPL\_W873

# SETTING WORD OPTIONS

All of Microsoft Word's settings are located in the **Word Options** dialog box. The Word Options control the behaviour and appearance of Word, enabling you to adjust the operation of Word to suit the way you work.

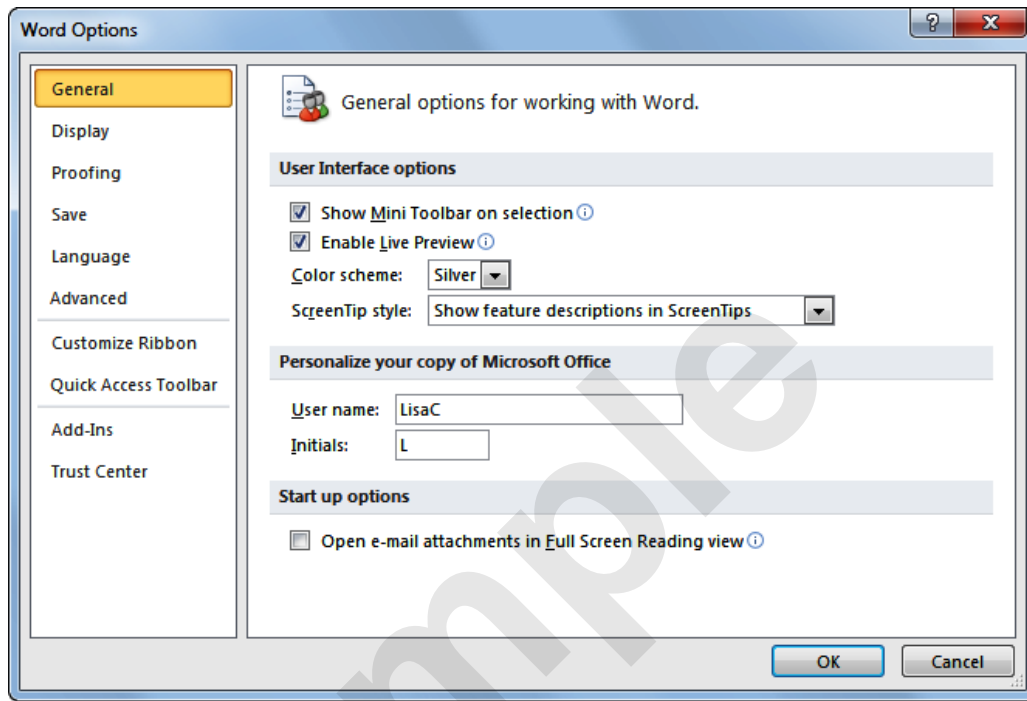
**In this session you will:**

- ✓ gain an understanding of **Word Options**
- ✓ learn how to personalise **Word**
- ✓ learn how to set the display options
- ✓ gain an understanding of file locations
- ✓ learn how to set file locations
- ✓ gain an understanding of **Save** options
- ✓ learn how to set save options.

# UNDERSTANDING WORD OPTIONS

Microsoft Word's settings are accessible via the **Word Options** dialog box. You can open this dialog box by clicking on **Options** in the **Backstage view**. Because there are so many

settings available, they are grouped into several categories which are listed in the pane on the left. As you click on a category, the settings grouped in that category will display in the pane on the right.



Category	Description
<b>General</b>	These settings control some of the most popular options, including the display and enabling of the Mini toolbar and Live Preview, as well as options for personalising Microsoft Office. The settings in this category affect all applications in Microsoft Office.
<b>Display</b>	The Display options allow you to control the display of documents and the information that appears when the document is printed.
<b>Proofing</b>	Proofing options control the autocorrect, spelling and grammar settings.
<b>Save</b>	The location and format used when documents are saved is controlled by the Save settings, as well as the way documents are shared.
<b>Language</b>	These settings control the languages that are used in Help and when you edit your documents.
<b>Advanced</b>	The Advanced settings control a wide range of options, such as editing, cut and paste, display, print and save.
<b>Customise Ribbon</b>	These settings control the content of the <b>Ribbon</b> and its tabs. For example, you can use these settings to add commands to the ribbon that are not included by default.
<b>Quick Access Toolbar</b>	These settings control the content of the <b>Quick Access Toolbar</b> .
<b>Add-Ins</b>	Add-ins are special programs that bring additional functionality to Microsoft Word.
<b>Trust Centre</b>	The settings that protect your documents are stored in the Trust Centre.

# PERSONALISING WORD

Every time you work in a Microsoft Office application, user information is added to the file behind the scenes. Some of this information is found on the **General** tab of the **Word Options**

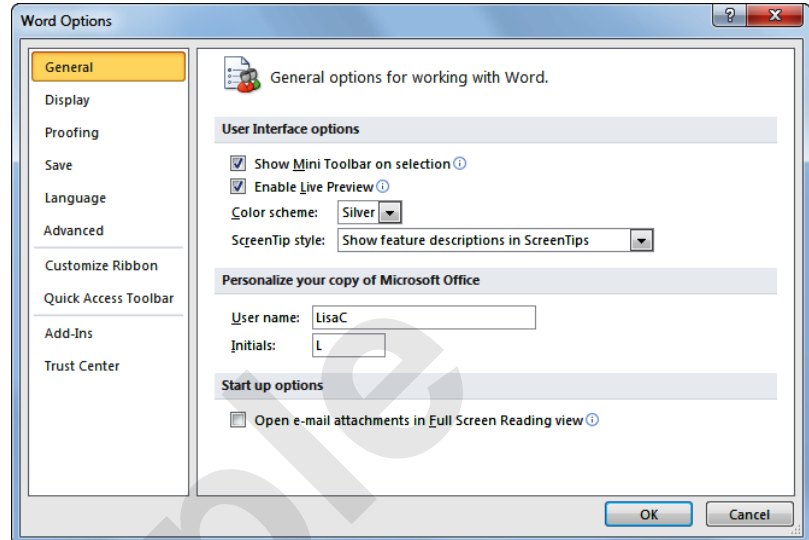
dialog box. The entries in these fields are used in various functions in Word such as cover pages, tracking changes and comments. **User name** is also used as the **Author** in **Document Properties**.

## Try This Yourself:

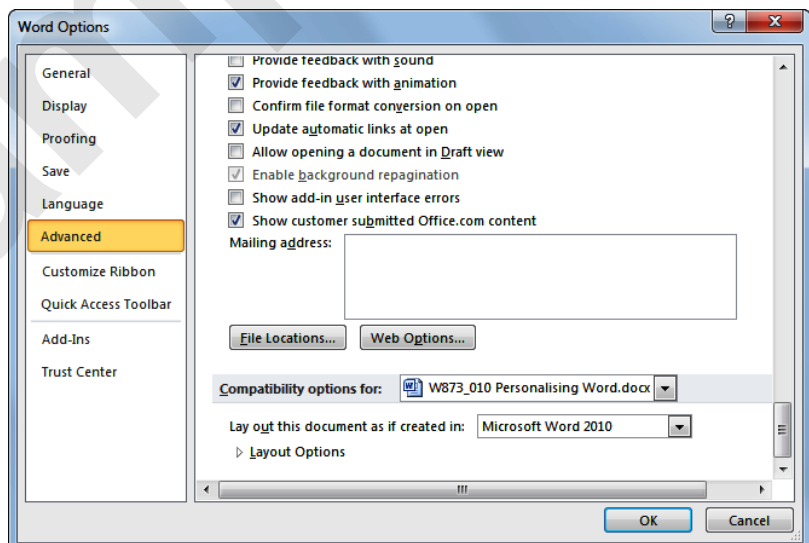
**Open File**

*Before starting this exercise you MUST ensure that Word has started and that a blank document is open...*

- 1 Click on the **File** tab and click on **Options** to open the **Word Options** dialog box
- 2 Click in **User name** and type your name  
*If text already appears in the field, triple-click in the field to select it, then type your name...*
- 3 Press **Tab** to move to **Initials** then type your initials
- 4 Click on the **Advanced** category then scroll down to the bottom of the settings
- 5 Click in **Mailing address** and type a fictional address
- 6 Click on **[OK]** to save the settings



1



4

## For Your Reference...

To **personalise Word**:

1. Click on the **File** tab
2. Click on **Options**
3. Enter relevant details in **User name, Initials** (General) and **Mailing address** (Advanced)

## Handy to Know...

- The information that you enter in the **Mailing address** field will be used by Microsoft Word as the default return address in the **Envelopes** and **Labels** feature.

# SETTING DISPLAY OPTIONS

The **Display** options found in the **Word Options** dialog box control the appearance and behaviour of documents when they are displayed and printed. For example, if you prefer to work with

the formatting marks displayed, you can turn some or all of them on. You can also choose to print document features that are normally not printed, such as the document properties.

## Try This Yourself:

**Open File**

Before starting this exercise you **MUST** ensure that a blank document is open...

1 Type **The quick brown fox jumps over the lazy dog.**

2 Press **Enter**, **Tab** and then **F4** to repeat the key strokes

Your text should look like that shown in the sample...

3 Click on the **File** tab then click on **Options**

4 Click on **Display** to see the display settings

5 Click on the checkbox for **Show all formatting marks** until it appears with a tick then click on **[OK]**

The spaces, paragraph markers and tabs will now be visible in the text....

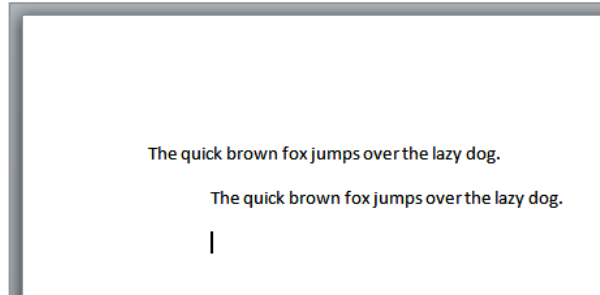
6 Click on the **File** tab then click on **Options**

7 Click on **Display** then click on the checkbox for **Show all formatting marks** to remove the tick

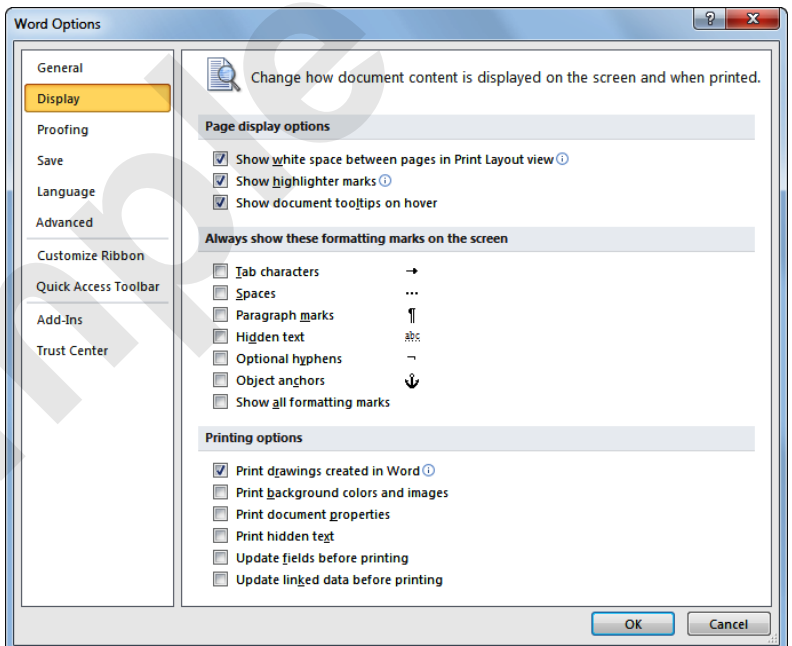
8 Click on **[OK]**

The formatting marks will be hidden again

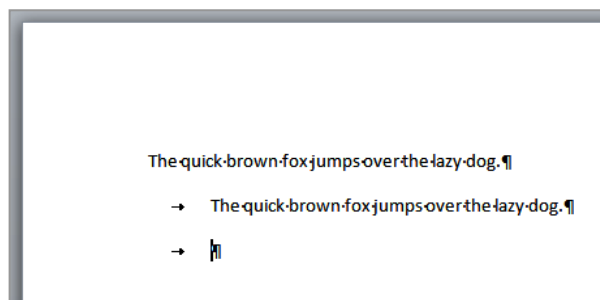
2



4



5



## For Your Reference...

To **set** the **display options**:

1. Click on the **File** tab
2. Click on **Options**
3. Click on **Display**
4. Make the required changes then click on **[OK]**

## Handy to Know...

- Any page background colour that you apply to the document will not print unless you select **Print background colours and images** under **Printing options** in the **Display** settings.

# UNDERSTANDING FILE LOCATIONS

Different types of files that you might need to access in Microsoft Word are stored in various locations either on your computer or on a server. The **File Locations** dialog box records the

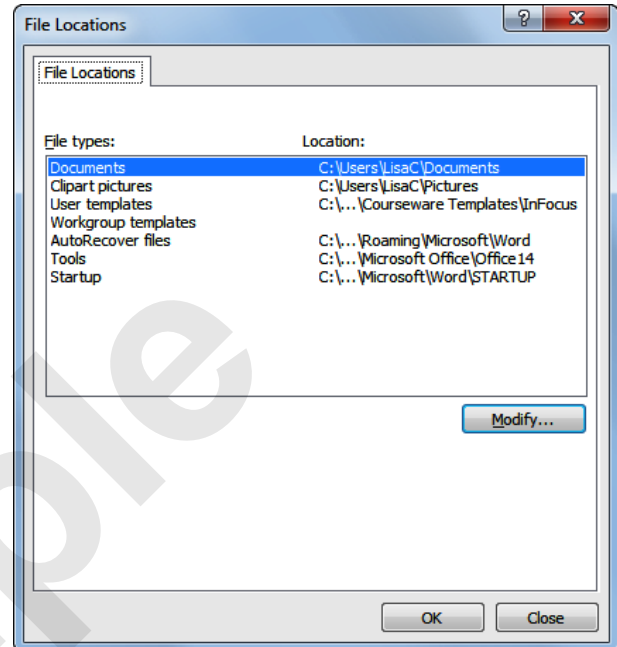
default storage locations for documents, templates, clip art and other types of files. This can be accessed via the **Advanced** settings in the **Word Options** dialog box.

The **locations** of different **file types** are recorded in the **File Locations** dialog box (as shown below). The role of each file type is discussed here.

## Documents

The documents are the files that you create in Word. The folder specified under **Location** determines where Word will save your documents and where it will look when you click on the **File** tab and click on **Open**.

By default, the folder location of **Documents** is the **Documents** folder for the user who is currently logged on. However, if you prefer to save your documents in another location, you can save time by changing the **Location** for **Documents** to your preferred folder.



## Clipart Pictures

If you insert pictures and other graphics regularly into your documents, you can save time by storing the images in a specific folder and setting this folder as the **Location** for **Clipart pictures**. When you are ready to insert an image and you click on **Picture** in the **Insert** tab, Word will display the **Insert Picture** dialog box with this folder open, except for the first time in a Word session – in which case Word will open the **My Pictures** folder.

## User Templates

If you create your own Word templates, you probably want to be able to access them via the **My Templates** page in the **New** dialog box. Normally, templates are automatically saved in the correct folder, but if you want to be able to copy other templates into the right location, you can find the folder under **User templates** in the **File Location** dialog box. Click on **User templates** and then click on **[Modify]** to access the entire path name. Click on **[Cancel]** to close the dialog box without making any changes.

## Workgroup Templates

If you share workgroup templates on a network, or prefer to keep your own templates in a folder other than the **User Templates**, this location can be specified under **Workgroup templates**.

## AutoRecover Files

This option specifies the location in which files are stored when they are saved to enable autorecovery.

## Tools

This is the location of alternative proofing tools such as your custom dictionary.

## Startup

The **Startup** folder is a secure folder which is initially empty. If you have a macro that you want to run automatically whenever you start Microsoft Word, place the file containing the macro in this folder.

# SETTING FILE LOCATIONS

By default, Microsoft Word will set up some of the file locations for the different file types during installation. However, you can change these at any time. For example, if you keep all of your

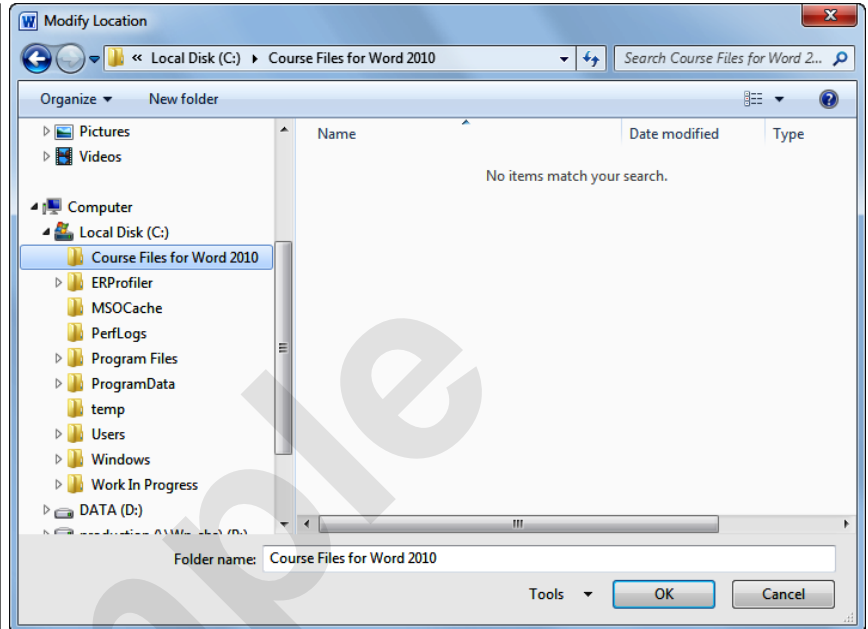
documents for a specific client in an appropriately named folder, you can specify this folder in **File Locations**. This way, Word will automatically look there when you open or save files.

## Try This Yourself:

**Open File**

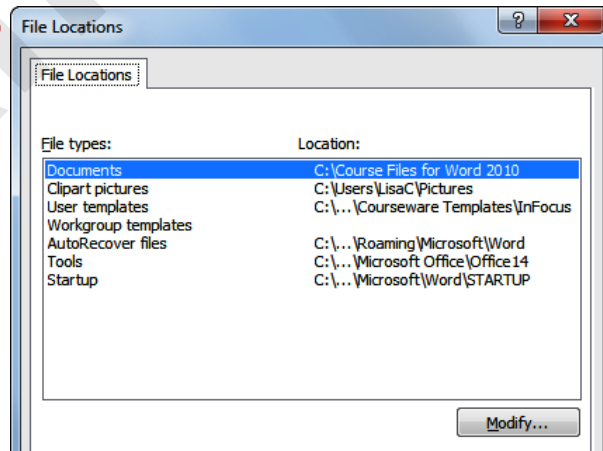
*Before starting this exercise you MUST ensure Word has started...*

- 1 Click on the **File** tab
- 2 Click on **Options** then click on **Advanced**
- 3 Scroll to the bottom of the box and click on **[File Locations]** to open the **File Locations** dialog box
- 4 Ensure **Documents** is selected under **File types**, then click on **[Modify]** to open the **Modify Location** dialog box
- 5 Navigate to and click on the **Course Files for Word 2010** folder
- 6 Click on **[OK]** to apply the changes
- 7 Click on **[OK]** to close the **File Locations** dialog box
- 8 Click on **[OK]** to close the **Word Options** dialog box
- 9 Click on the **File** tab and click on **Open** to display the **Open** dialog box – the course files folder will open – then click on **[Cancel]**



5

6



## For Your Reference...

To **set file locations**:


1. Click on the **File** tab and click on **Advanced**
2. Scroll down to and click on **[File Locations]**
3. Click on the **File type** and click on **[Modify]**
4. Locate the folder then click on **[OK]** three times

## Handy to Know...

- When you set the **Clipart pictures** location, this folder will not be opened the first time you display the **Insert Pictures** dialog box – the **My Pictures** folder will be. Navigate to the correct folder, insert an image and then this folder should open automatically next time (during the current Word session).



# UNDERSTANDING SAVE OPTIONS

If you thought that saving a document was as simple as clicking on the **Save** tool  or pressing **Ctrl** + **S**, you'd be right – from your perspective. From Word's perspective, however,

there is a whole lot more that goes on when you save a document. The operation is controlled by the many save settings that appear in the **Word Options** dialog box.

## Save Settings

The **Save** settings appear in two categories in the **Word Options** dialog box – **Save** and **Advanced**. The **Save** category of settings includes the following options:

<b>Save files in this format</b>	Word allows you to save your documents in a wide range of formats. Whatever you select here will be the format that Word uses automatically to save the file unless you specify a different format when you save.
<b>Save AutoRecover information every x minutes</b>	Word automatically creates a document recovery file at the interval you specify in <b>minutes</b> . You can specify a time from 1 to 120 minutes. If Word crashes for any reason (after initially saving the file), you can open the file you were working on and restore the latest AutoRecovery file which will be labelled <b>when I closed without saving</b> under <b>Versions</b> in the <b>Info</b> window of the <b>Backstage</b> . Opening this file will not only restore any data that you had changed, but it will also restore any state changes that you had made such as window zooming, opening task panes and the like.
<b>Keep the last autosaved version if I close without saving it</b>	If you close a document without saving it, enabling this option will ensure a version of your file will be created and kept temporarily (for up to four days). You can recover the unsaved version of a document by clicking on <b>Recover Unsaved Documents</b> at the bottom of the <b>Recent</b> window in the <b>Backstage</b> as long as you have also enabled <b>AutoRecover</b> by ticking <b>Save AutoRecover information every x minutes</b> (see above).
<b>AutoRecover file location</b>	This is the folder in which the AutoRecover files are stored.
<b>Default file location</b>	This is the folder in which documents are automatically stored. It is also the folder that is opened when you click on the <b>File</b> tab and click on <b>Open</b> . This is the same folder as that shown in <b>File Locations</b> .
<b>Save checked-out files to</b>	This specifies whether or not to save checked-out files to your computer or to the server. It is used for document sharing.
<b>Server drafts location</b>	This specifies the local server drafts location that is used if your checked-out files are stored locally.
<b>Embed fonts in the file</b>	This embeds the fonts in the document so that if the file is opened on a computer that doesn't have the fonts, they can be accessed from the document. This preserves the appearance of your document.

## Advanced Save Settings

There are a series of save settings located under **Save** and **Preserve fidelity when sharing this document** in the **Advanced** category of **Word Options**. These are:

<b>Prompt before saving Normal template</b>	The <b>Normal</b> template is used to create blank documents. If you leave this checkbox clear, any changes to the Normal template will be saved automatically. Otherwise, Word will prompt you to confirm the changes.
<b>Always create backup copy</b>	This creates a backup copy of a document each time you save it. The backup copy is stored in the same folder as the document.
<b>Copy remotely stored files onto your computer, and update the remote file when saving</b>	This option temporarily stores locally a copy of a file that you usually store on a network or removable drive. When you save the local copy, Word saves your changes to the original copy. If the original file is not available, Word prompts you to save the file in another location to avoid losing data.
<b>Allow background saves</b>	This forces Word to save the document as you are working.
<b>Save form data as delimited text file</b>	This allows you to save form data in a comma-delimited format in a text file. You can then use the text file to import the form values into a database program.
<b>Embed linguistic data</b>	This saves speech and handwritten data.

# SETTING SAVE OPTIONS

The **Save** settings in Word reside in the **Word Options** dialog box. They can be used to modify the way Word saves documents, enabling you to create backup copies automatically or specify a

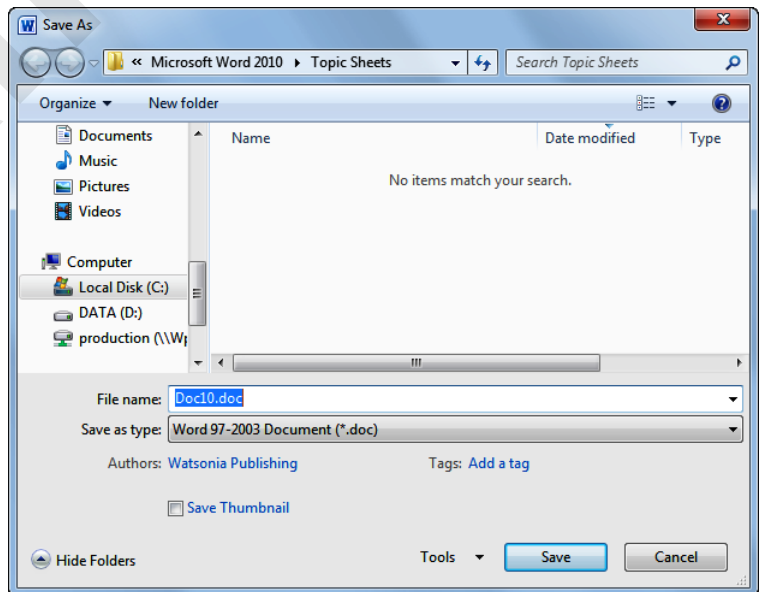
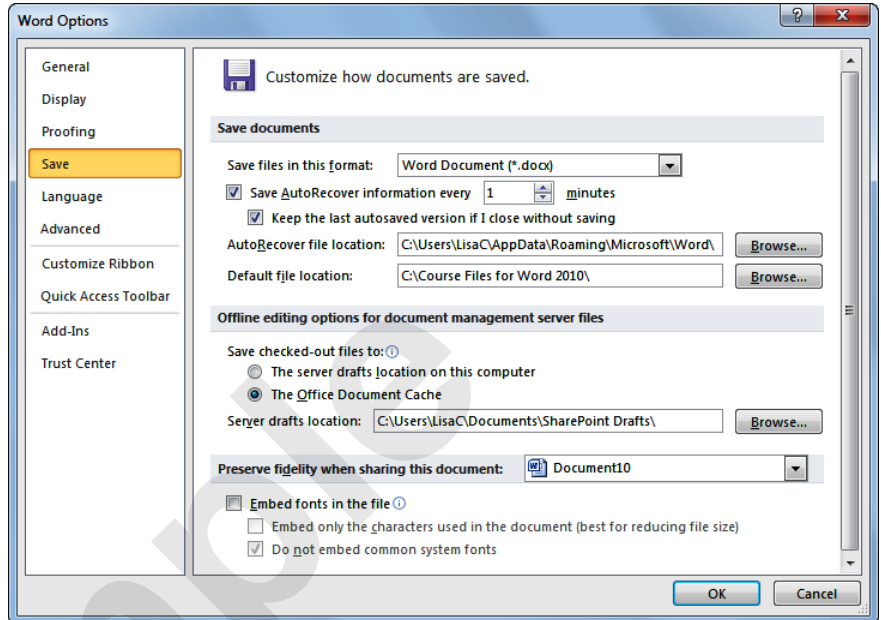
different default save format. This is great, for instance, if you need to save all of your documents in **Word 97-2003 Document** format for compatibility reasons.

## Try This Yourself:

**Open File**

*Before starting this exercise you MUST ensure Word has started...*

- 1 Click on the **File** tab and click on **Options** to open the **Word Options** dialog box
- 2 Click on the **Save** category to display the save settings
- 3 Click on the drop arrow ▼ for **Save files in this format** and select **Word 97-2003 Document (\*.doc)**
- 4 Click on [OK] to save the changes
- 5 Click on the **File** tab and click on **Save**  
*Notice that the Save as type is automatically Word 97-2003 Document (\*.doc)...*
- 6 Click on [Cancel]
- 7 Repeat steps 1 to 4 and change **Save files in this format** back to **Word Document (\*.docx)**



## For Your Reference...

To **set save options**:

1. Click on the **File** tab
2. Click on **Options**
3. Click on **Save** or **Advanced**
4. Change the setting as required and click on [OK]

## Handy to Know...

- The **Save as type** setting can be changed at the time you save a file but by making the change in **Word Options**, the format you need will appear automatically saving you time and reducing the likelihood that you'll use the wrong format.



## CHAPTER 2

## NAVIGATION PANE

InFocus

WPL\_W813

As its name implies, you can use the **Navigation pane** to navigate a document. You can either navigate to a specific page or heading within the document.

But that's not all it can do.

As long as you have applied Word's **Heading** styles to the headings in a document, you can use the **Navigation pane** to get a clear understanding of the logical flow of a document's content. And then if you think anything is missing or in the wrong location, you can use the **Navigation pane** to quickly edit the document including inserting and deleting headings and moving headings and their content to a new location.

**In this session you will:**

- ✓ learn how to navigate a document using the **Navigation** pane
- ✓ learn how to review the heading levels in a document using the **Navigation** pane
- ✓ learn how to edit headings using the **Navigation** pane
- ✓ learn how to add headings and subheadings using the **Navigation** pane
- ✓ learn how to move headings using the **Navigation** pane.

# NAVIGATING DOCUMENTS



When you open a document, the **Navigation pane** will display by default (unless you've turned off this feature). This handy pane lets you quickly navigate documents by clicking on a heading in

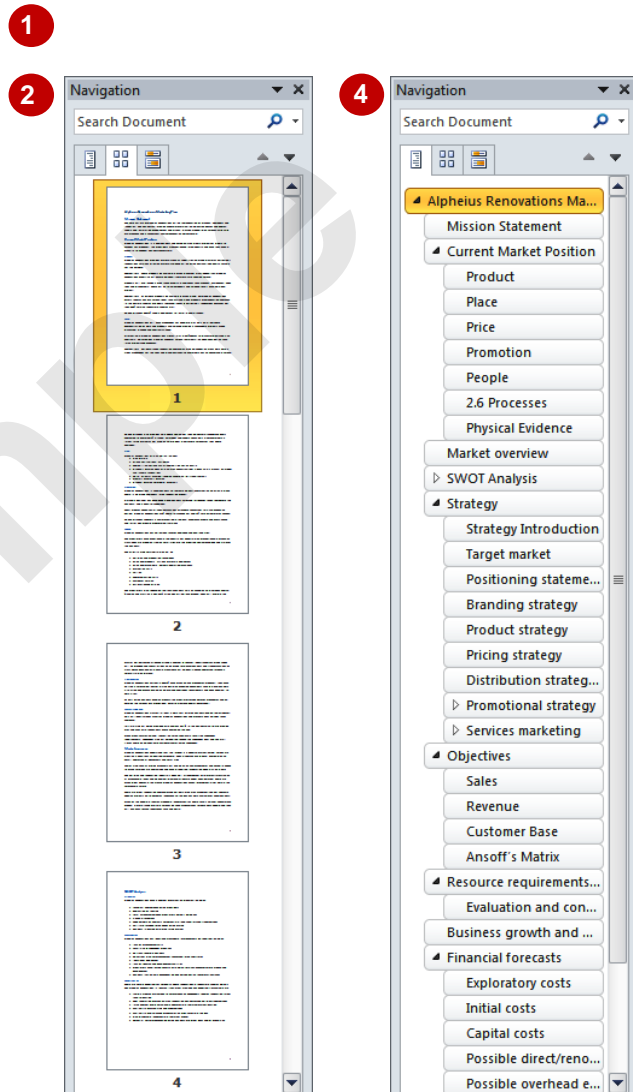
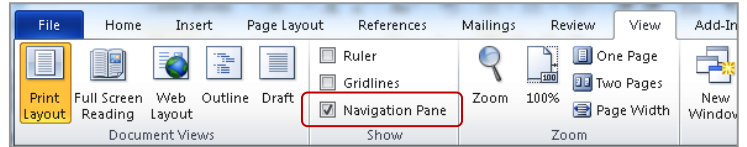
the outline to move to that heading or by clicking on a page thumbnail to move to that page. The **Navigation pane** is ideal to use particularly when you are working with long documents.

## Try This Yourself:

**Open File**

Before starting this exercise you **MUST** open the file W813 Navigation Pane\_1.docx...

- 1 If the **Navigation pane** is not displayed to the left of the document window, click on the **View** tab of the ribbon and tick **Navigation Pane** in the **Show** group as shown
- 2 Click on the **Browse the pages in your document** tab  near the top of the **Navigation pane**  
*Browsing the page thumbnails gives you a bird's eye view of a document – this document has 16 pages as shown by the 16 thumbnails...*
- 3 Scroll down to and click on thumbnail **14** to display page **14**
- 4 Click on the **Browse the headings in your document** tab   
*The document's headings and subheadings will display in a clear top to bottom arrangement. They are indented based on their heading level which range in this case from Heading 1 (top-level heading) to Heading 4. You can quickly navigate to the desired section in a document...*
- 5 Click on **Alpheius Renovations Marketing Plan** (at the top of the **Navigation pane**) to move to the first heading in the document




## For Your Reference...

To **navigate** with the **Navigation pane**:

- Click on a heading in the **Browse the headings in your document** tab to move to that heading in the document
- Click on a thumbnail in the **Browse the pages in your document** tab to move to that page in the document

## Handy to Know...

- You can close the **Navigation pane** by clicking on **close** .
- You must apply Word's heading styles (eg, **Heading 1**, **Heading 2** and so on in the **Styles** gallery on the **Home** tab) to each heading for them to display with the correct indentation in the **Navigation pane**.

# VIEWING HEADINGS

You can use the **Navigation pane** to quickly check that you have applied the appropriate heading style to each heading in a longer document, such as a business plan. You can do

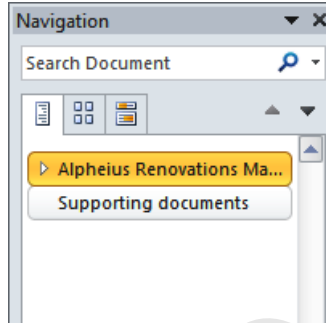
this by collapsing all headings and then progressively showing the various heading levels. If a heading is indented incorrectly, simply promote or demote it as desired and Word will do the rest.

## Try This Yourself:

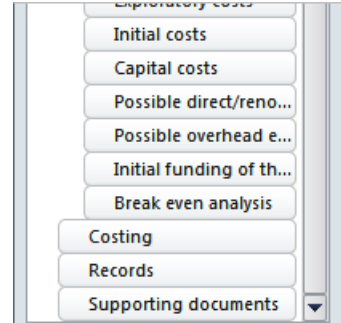
**Same File**

Continue using the previous file with this exercise, or open the file W813 Navigation Pane\_1.docx...

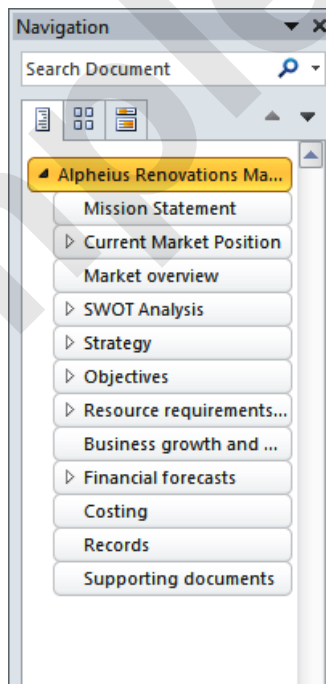
- 1 Ensure the **Navigation pane** is displayed
- 2 Right-click on any heading in the **Navigation pane** and select **Collapse All**  
*All Heading 2 and lower headings will collapse. Only the document title should be listed but as you can see, the Supporting Documents heading is also displayed – you can fix easily this ...*
- 3 Right-click on **Supporting documents**, select **Demote** then scroll down to the bottom of the **Navigation pane** and check that the heading has been indented from a level 1 to level 2 heading  
*Let's check the heading levels of the various headings now – this makes it easy to ensure the correct style has been applied to each heading...*
- 4 Repeat step 2 to collapse all headings and then right-click on the top-level heading and select **Show Heading Levels > Show Heading 2**
- 5 Repeat step 4 to show all **Heading 3** headings
- 6 Right-click on a heading and select **Expand All**



2

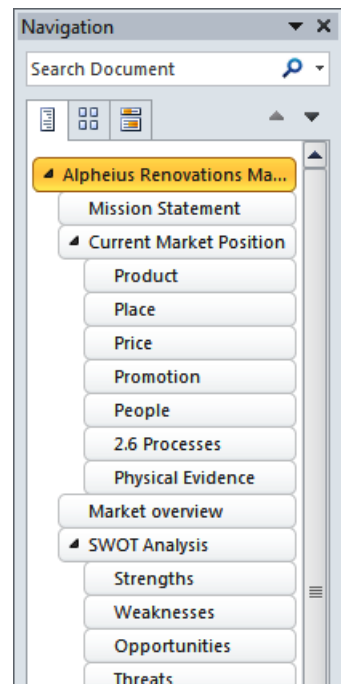


3



4

Both Heading 1 and Heading 2 level headings will be displayed when you show Heading 2 headings



5

And consequently, Heading 1, Heading 2 and Heading 3 level headings will be displayed when you show Heading 3 headings

## For Your Reference...

To view heading levels:

1. Right-click on any heading in the **Navigation pane** and select **Collapse All**
2. Right-click on the top-level heading and select **Show Heading Levels > Show Heading #**

## Handy to Know...

- When you **promote** (outdent) or **demote** (indent) a heading in the **Navigation pane**, Word will also automatically apply the appropriate heading style such as **Heading 1**, **Heading 2** and so on to the headings in the document.

# EDITING HEADINGS

If your document has lots of headings, chances are that they will not be named consistently throughout the document. For instance, you may have used plurals for some headings (**Editing**

**Headings** vs. **Editing A Heading**), used different cases (**Editing Headings** vs. **Editing headings**) and more. The **Navigation pane** provides a clear list in which you can check (and edit) headings.

## Try This Yourself:

**Same File**

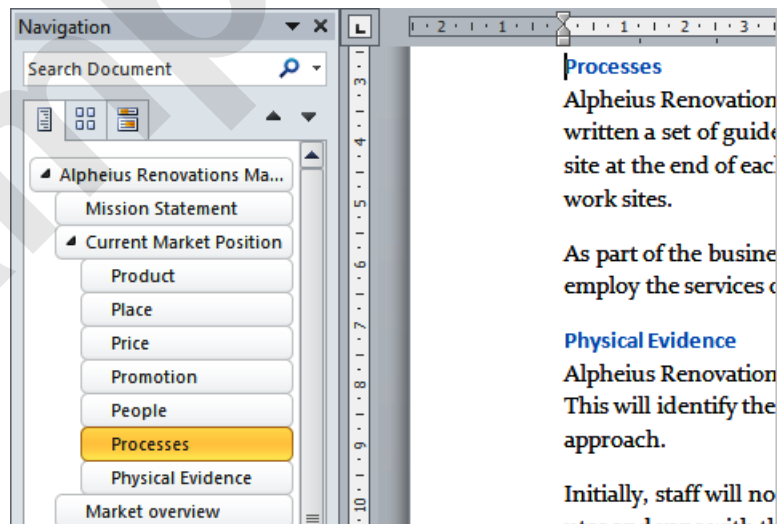
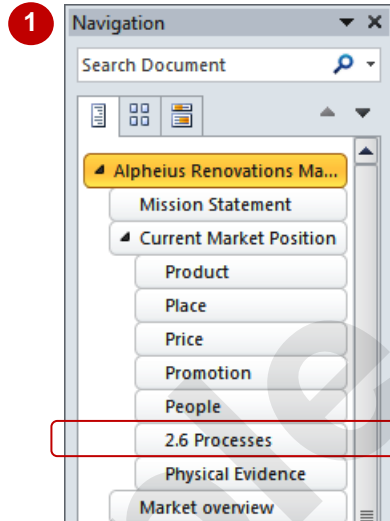
Continue using the previous file with this exercise, or open the file *W813 Navigation Pane\_2.docx...*

- 1 Ensure all headings are displayed in the **Navigation pane**

Originally when we created this document, all headings were numbered. If you look at the Level 3 headings beneath *Current Market Position* near the top of the **Navigation pane**, you'll see that we missed removing the numbers from the *Processes* heading...

- 2 Click on **2.6 Processes** to move to that heading in the document, then press **Del** four times to delete **2.6** and the space from the left of the heading

The heading in the **Navigation pane** will update as you edit the heading in the document



2

## For Your Reference...

To edit a heading using the **Navigation pane**:

1. Click on the heading in the **Navigation pane**
2. Edit the text in the document as desired

## Handy to Know...

- You can delete a heading and its content (including any subheadings under the heading) using the **Navigation pane**. To do this, right-click on the desired heading and select **Delete**. You cannot delete the last heading in a document using this method.