
































**Course Manual:**







































# **Word Intermediate**



Technical support: [info@formationcad.ca](mailto:info@formationcad.ca) or (514) 316-6824

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# WORD INTERMEDIATE

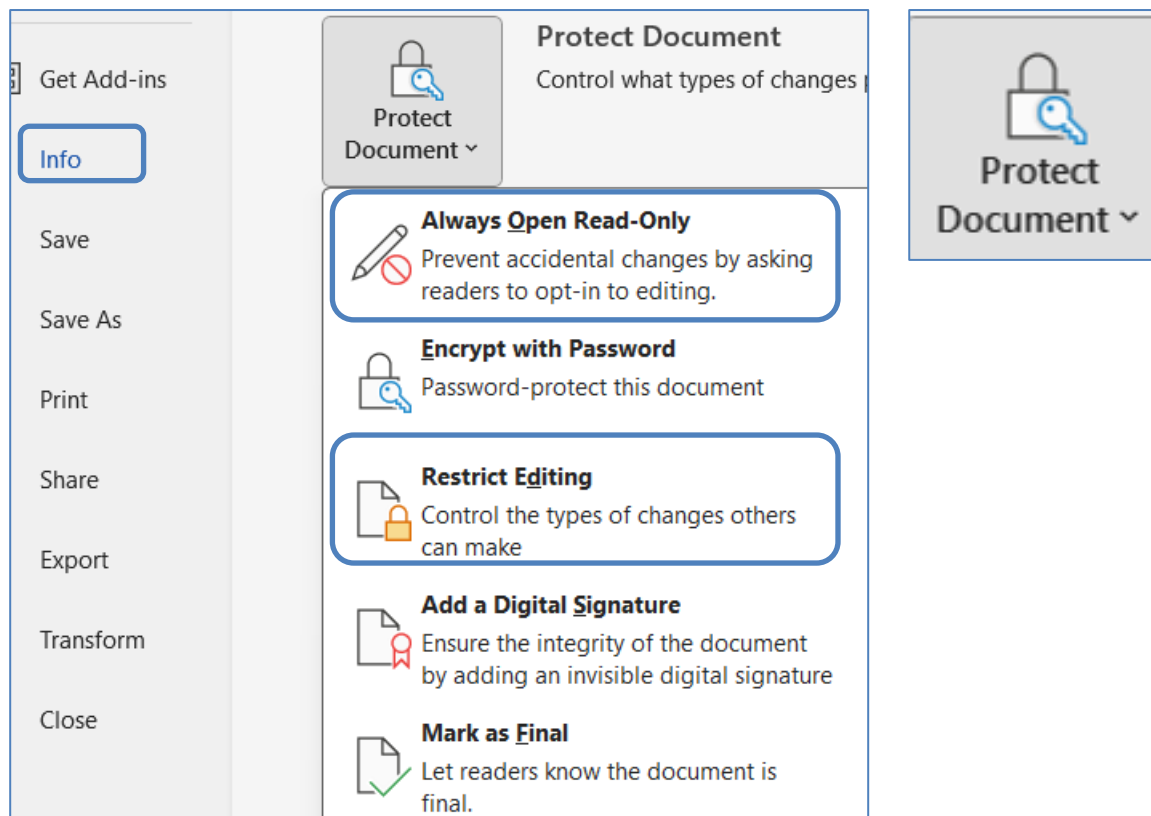
## File tab

In the **File** tab, we find the classic options of the file menu of previous versions such as: **open**, **close**, **save-as**, and **many more**.

## INFO

In **INFO**, we find two important options for our Intermediate Word course

**Here are some protection options**

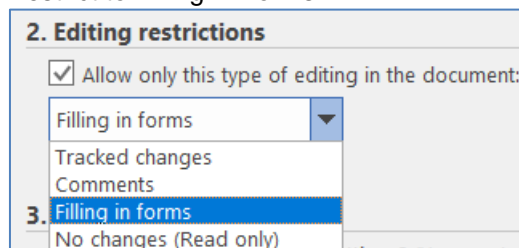


## Read only

Making your document a read-only file means that the document can be copied and not modified. If someone tries to make changes to a read-only file, the changes can be saved only by giving a new name or saved to a new location.

## Restrict Editing

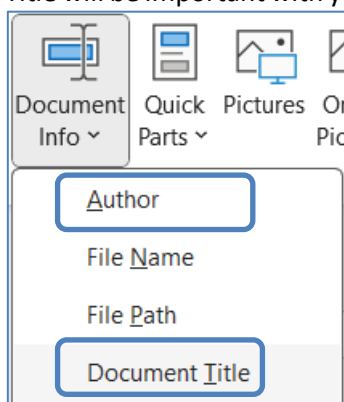
- ✖ Restrict for Review (Tracked changes – Comments)
- ✖ Restrict to Filling in Forms



## Properties

Do not forget Properties when you create a document

1. Title will be important with your Header or Footer



2. Related Dates

- ✖ Last Modified
- ✖ Created
- ✖ Last Printed

Related Dates	
Last Modified	Today, 14:25
Created	Yesterday, 17:05
Last Printed	Yesterday, 17:04

Properties ▼

Size	5,05MB
Pages	29
Words	6096
Total Editing Time	3380 Minutes
Title	Word Intermediate
Tags	Add a tag
Comments	Add comments

Related Dates

Last Modified	2024-01-17 14:43
Created	2021-10-25 09:27
Last Printed	2021-10-29 14:58

Related People

Author	MR Murielle Richard
	Add an author
Last Modified By	PL Pierre Levesque

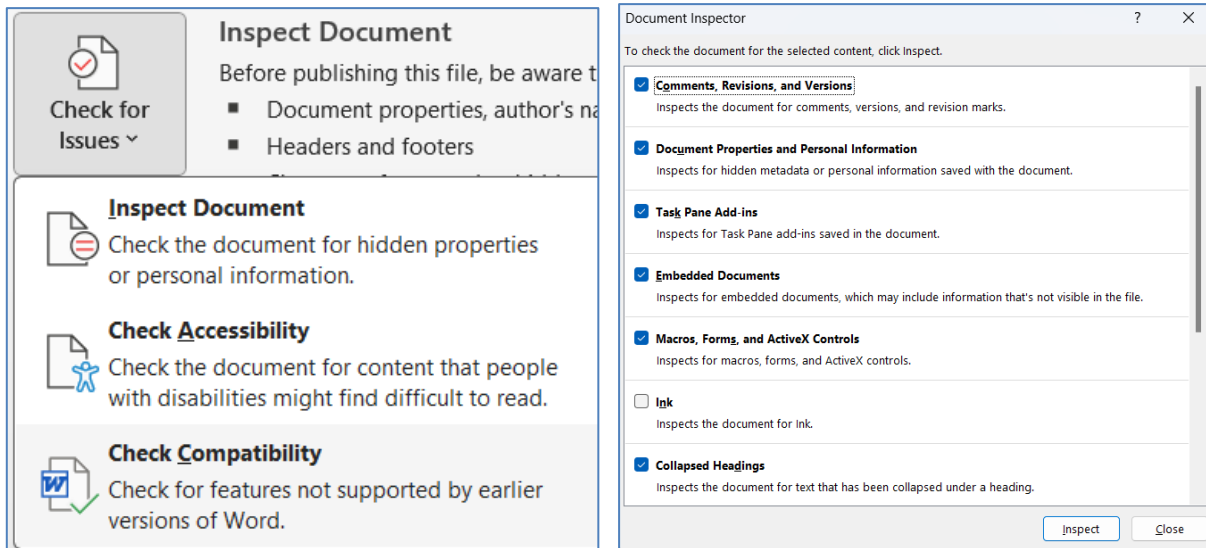
## Check for issues

Why use document inspection?

- ✖ To remove all headers, footers, and watermarks
- ✖ To eliminate all marks of revisions and the like...

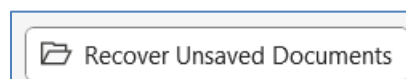
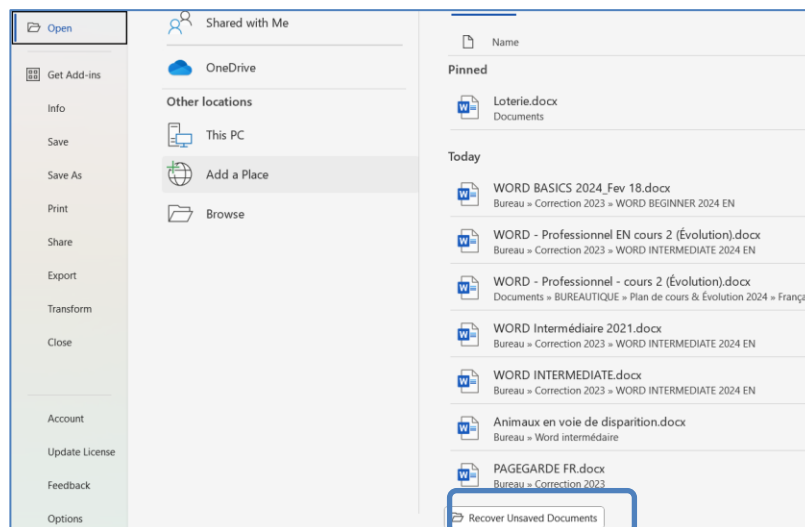
IF YOU CLICK ON "**INSPECT DOCUMENT**", IT WILL ASK YOU TO SAVE TO PROTECT YOURSELF.

Example: for revision marks, this one will assume that you accept all trademarks, so it is important to register under a different name.



## RECOVER AN UNSAVED DOCUMENT

An unsaved document can be recovered, to perform this action, click "**Open**"

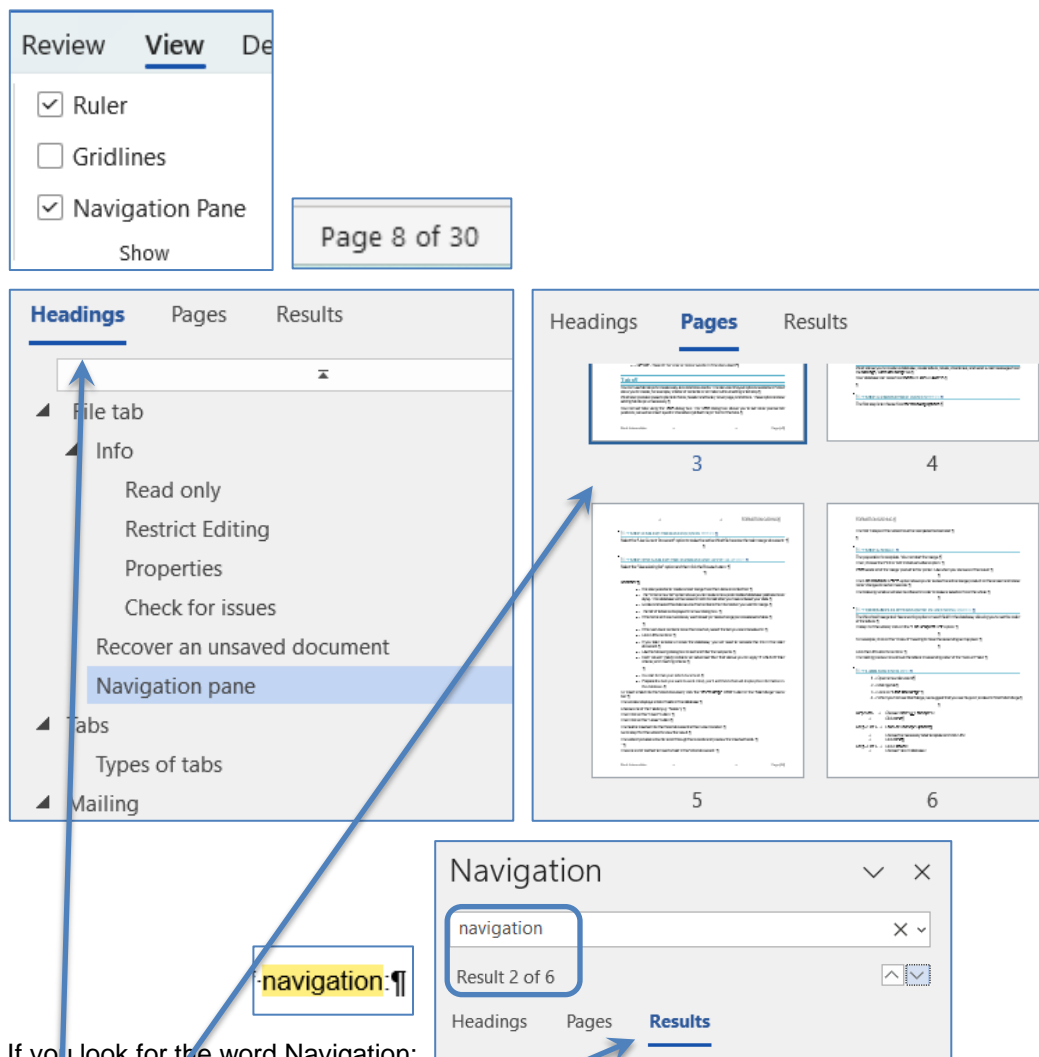


This action will be available for as long as your computer remains open.

## NAVIGATION PANE

To make it easier to navigate through a long document, the document explorer becomes the navigation pane.

- ✦ To open Navigation Pane, go to **View Tab, Group Show**, then **Navigation Pane**
- ✦ Also, if you double click on **Page x of xx** located in the status bar



If you look for the word Navigation:

This section offers us 3 types of navigation:

- ✦ **Headings** - Like a table of contents
- ✦ **Pages** - Like a thumbnail image, per page
- ✦ **Results** - Search for one or more words in the document

## W Tabs

You can use tab stops to create easy-to-format documents. The document layout options available in Word allow you to create, for example, a table of contents or an index without setting a tab stop.

Word also provides preset options for table, header and footer, cover page, and others. These options make adding tab stops unnecessary.

You can set tabs using the **Tabs** dialog box. The **Tabs** dialog box allows you to set more precise tab positions, as well as insert specific characters (dotted line) in front of the tabs.

Tabs are used to align information in columns. By default, **Word** has tab stops at 1.25 cm (0.49 in.) intervals, visible by small marks at the bottom of the ruler. However, you are free to add or remove stops as you see fit. In addition, dots ranging from text to tab can be added.

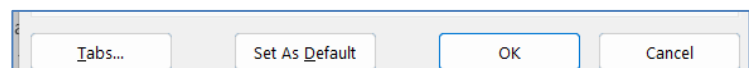
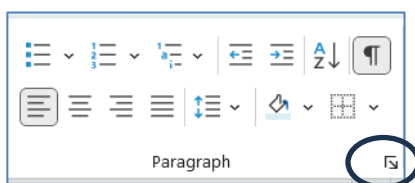


## TYPES OF TABS

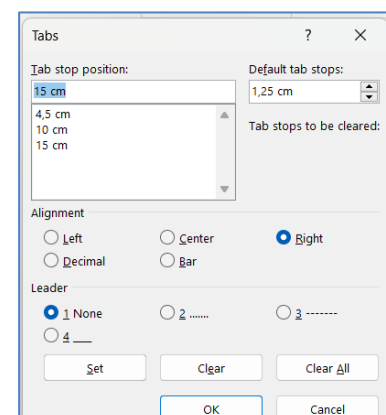
Word offers several types of tabs. Each type is identified by a symbol visible on the ruler.

Tab	Symbol	Function
Left Tab		Aligns the text to the right of the tab.
Centered Tab		Center the text on the tab.
Right Tab		Aligns the text to the left of the tab.
Decimal Tab		Aligns the decimal character to the tab.
Bar Tab		Inserts a vertical line into a paragraph.

1. On the **Home** tab, in the **Paragraph** group, click the **Paragraph** dialog box launcher, and then click **Tabs** at the bottom left of the Paragraph window



2. In the **Position** box, enter the position (measure) on the ruler that you want to set for the tab stop.
3. Under **Alignment**, choose **Left**, **Center**, **Right**, **Decimal**, or **Bar**.
4. Under **Leader**, choose **1 None**, **2 .....**, **3 -----**, or **4 \_** to define (in the case of options 2, 3, and 4) a series of characters that link, for example, a section title to a page number.



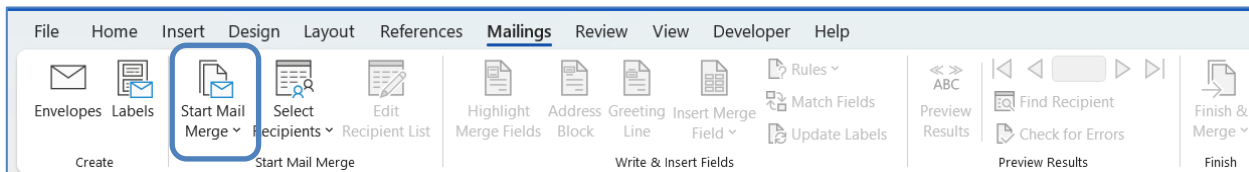
See EXERCISES: at the end of the document (p. 37-39)



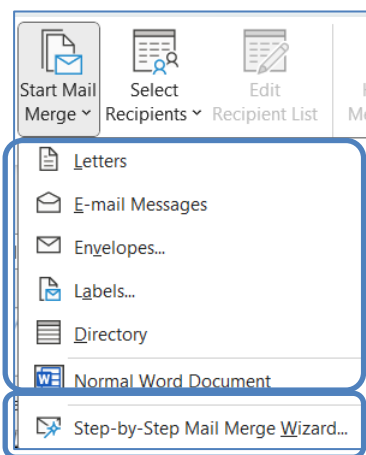
## Mailings

Word allows you to create a database, create letters, labels, directories, and send e-mail messages from the **Mailings**, **Start Mail Merge** tab.

Your database can come from **Word** or **Excel** or **Access**.

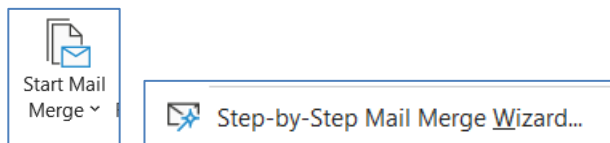


When you are a not comfortable using Mailings, we suggest you use **Step-by-Step Mail Merge Wizard...**



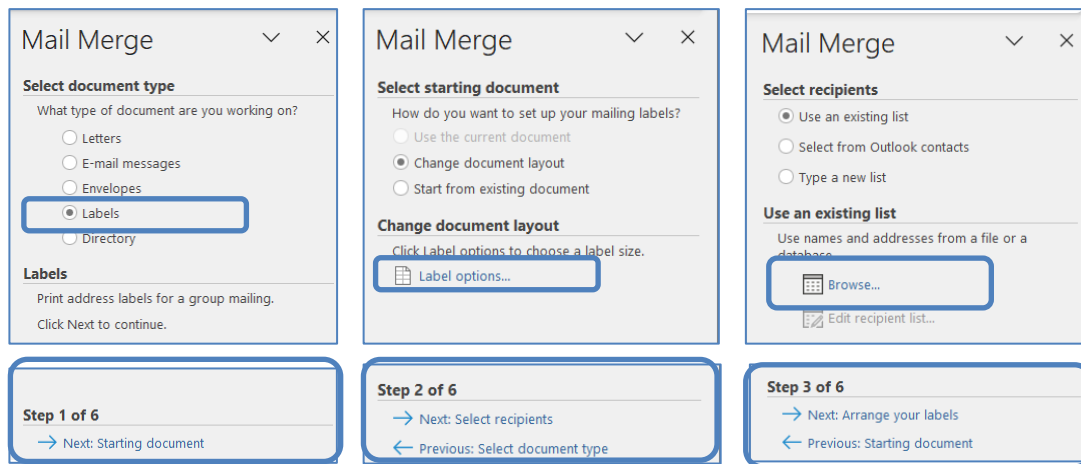
## LABELS OR ENVELOPES

- ✦ Open a new document
- ✦ Mailings tab
- ✦ Click on "Start Mail Merge"
- ✦ When you first use Mail Merge, we suggest that you use Support, located in **Start Mail Merge**, and choose **Step-by-step Mail Merge Wizard...**



**Step 1 of 6**

Choose **Labels** or **Envelopes**  
Click **Next**



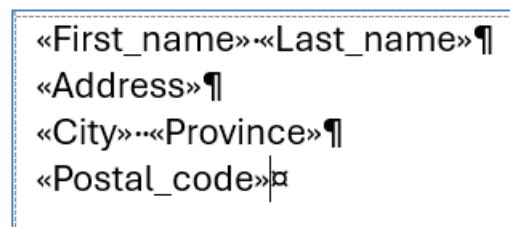
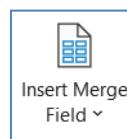
## Step 2 of 6

### Label or Envelope Options

Choose the necessary label template and click OK  
Click **Next**

## Step 3 of 6

Click **Browse**  
Choose File or Database  
**Insert Fields** in the label  
Click **Next**



## Step 4 of 6

Click on **Update All Labels**



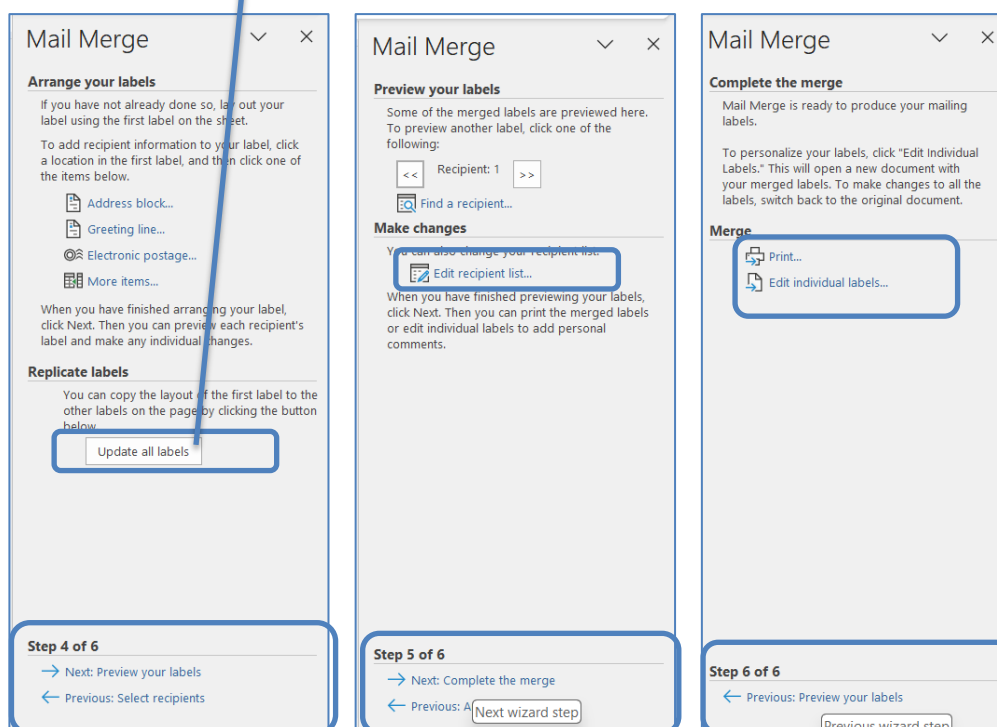
Click **Next**

## Step 5 of 6

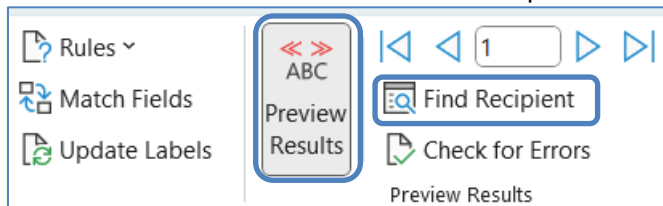
**Edit List** (If modification to be made)  
Click **Next** and **End of the Merge**

## Step 6 of 6

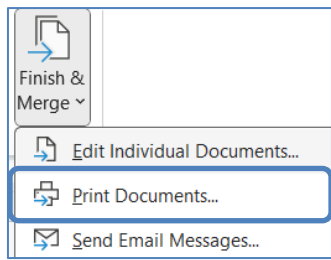
**Print or edit the document**



- ✦ Click on Results Preview and Look for a recipient.



- ✦ Click Edit Individual Labels



## STEP 1: CHOOSE THE DOCUMENT TYPE

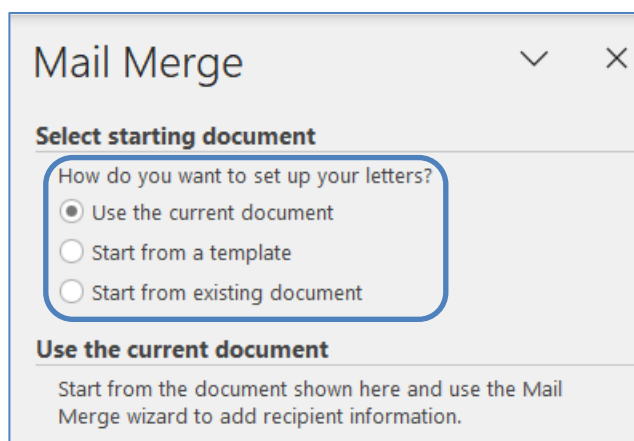
The first step is to choose from **the following options**:

- ✦ Letters
- ✦ E-mail Messages
- ✦ Envelopes...
- ✦ Labels...
- ✦ Directory



## STEP 2: SELECT STARTING DOCUMENT

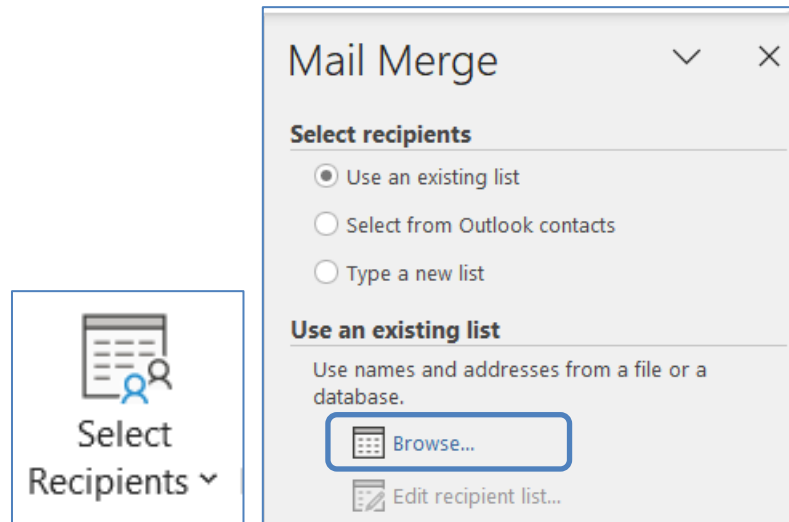
Select the "Use Current Document" option to make the active Word file become the main merge document.





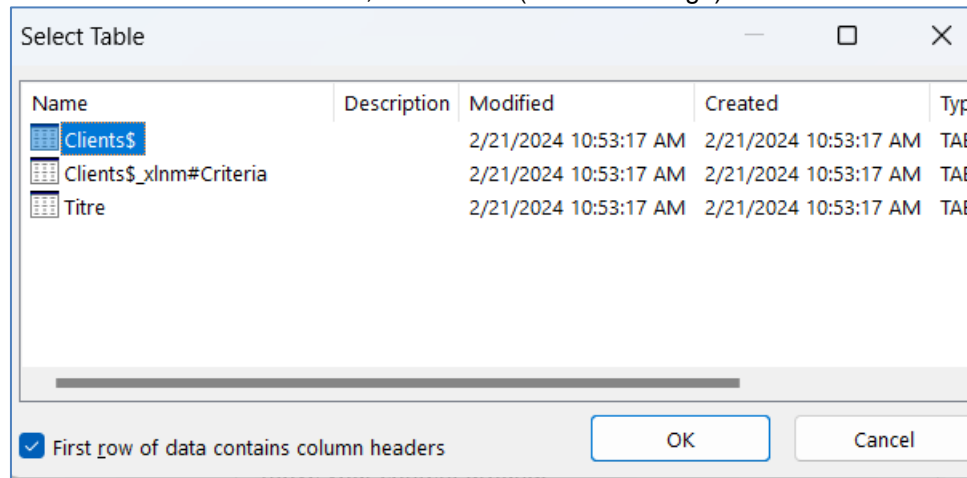
### STEP 3 TO 5: SELECT THE DATABASE AND APPLY A LAYOUT

Select the "Use existing list" option and then click the Browse button.



#### Remarks:

- ✖ It is also possible to create a mail merge from the Outlook contact list.
- ✖ The "Enter a new list" option allows you to create a new preformatted database (address book style). This database will be saved in mdb format after you have entered your data.
- ✖ Locate and select the data source that contains the information you want to merge.
- ✖ The list of tables is displayed in a new dialog box.
- ✖ If the list is an Excel workbook, each sheet (or named range) is considered a table.



- ✖ If the workbook contains more than one tab, select the tab in which you are interested.
- ✖ Click OK to confirm.
- ✖ If you later rename or move the database, you will need to recreate the link in the main document.
- ✖ Use the following dialog box to sort and filter the recipients.

- ✱ Each column (field) contains an advanced filter that allows you to apply 5 AND/OR filter criteria, and 3 sorting criteria.

Mail Merge Recipients

This is the list of recipients that will be used in your merge. Use the options below to add to or change your list. Use the checkboxes to add or remove recipients from the merge. When your list is ready, click OK.

Data Source	Last name	First name	Gender	Company	Address	City	Province
Restaurant cus...	Laguë	Anne-Marie	W	BISTRO DES BIÈRE...	7886, rue San Fran...	Boucherville	Quebec
Restaurant cus...	Roux	Guyline	W	BISTRO LE VIEUX ...	7676, boulevard C...	Boucherville	Quebec
Restaurant cus...	Langlois	Carole	W	BOSTON PIZZA	9534, rue Belleville	Boucherville	Quebec
Restaurant cus...	Pelletier	Catherine	W	BISTRO SIR WILFRI...	9400, rue Earle	Boucherville	Quebec
Restaurant cus...	Rouleau	Marc-André	M	ALEXANDRE	6848, rue Dufferin	Boucherville	Quebec
Restaurant cus...	Jalbert	Karine	W	QUEUE DE CHEVAL	4532, boulevard L...	Brossard	Quebec
Restaurant cus...	Mackay	Jean-François	M	RESTAURANT DU ...	5203, rue Durocher	Brossard	Quebec
Restaurant cus...	Lecours	Caroline	W	MODAVIE	7372, rue Forbes	Brossard	Quebec
Restaurant cus...	Valiquette	Lise	W	RAMPART	5800, 32e Avenue	Laval	Quebec
Restaurant cus...	Gagnon	Yves	M	AIX	8957, rue Strathm...	Laval	Quebec
Restaurant cus...	Chapdel	Diane	W	VERBEE	4475, rue Antoin...	Lac Beauport	Quebec

Data Source: Restaurant customers.xlsx

Refine recipient list

Sort...  
Filter...  
Find duplicates...  
Find recipient...  
Validate addresses...

Edit... Refresh OK

- ✱ You can format your Word document.
- ✱ Prepare the text you want to send. Next, you will add fields that will display the information in the database.

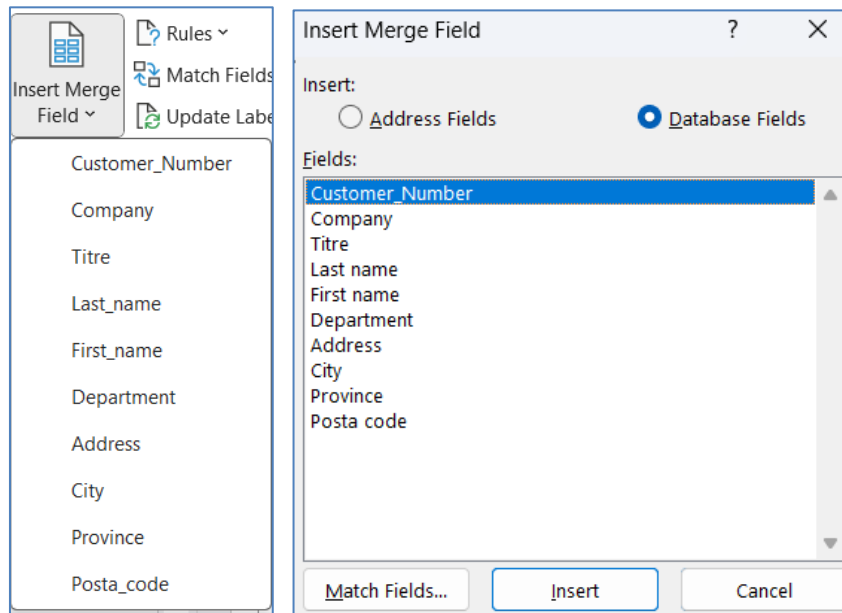


## INSERT FIELD

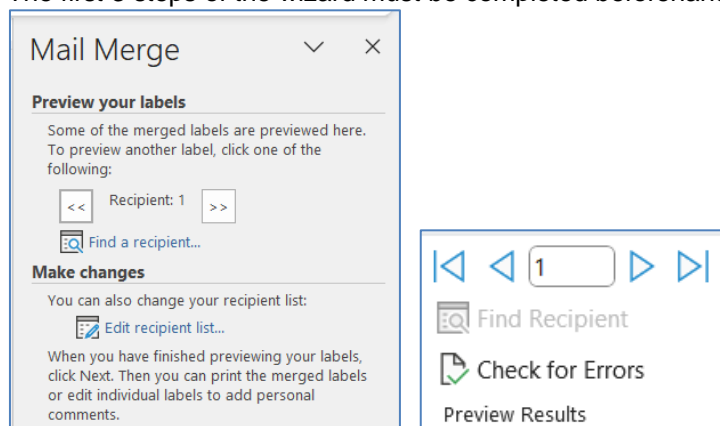
- ✱ To insert a field into the Word document, click the "Insert Merge Field" button in the "Mail Merge" menu bar.
- ✱ The window displays a list of fields in the database
- ✱ Choose one of the Fields (e.g. "Name").
- ✱ Then click on the "Insert" button.
- ✱ Then click on the "Close" button
- ✱ The field is inserted into the Word document at the cursor location.
- ✱ Go to step 5 of the wizard to view the result.
- ✱ The wizard provides a tool to scroll through the records and preview the inserted fields.

## Note

- ✖ There is a second method to insert a field in the Word document:



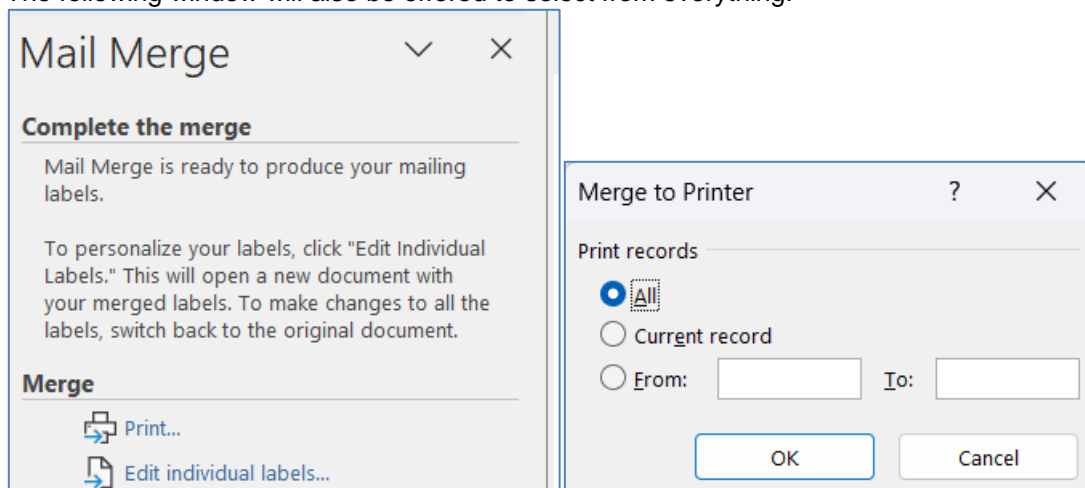
- ✖ The first 3 steps of the wizard must be completed beforehand



## STEP 6: MERGE

- ✖ The preparation is complete. You can start the merge.
- ✖ Then, choose the Print or Edit Individual Letters option.
- ✖ **Print** sends all the merge product to the printer. Use when you are sure of the result.
- ✖ The **Edit Individual Letters or Labels** option allows you to review the entire merge product on the screen and make minor changes to certain records.

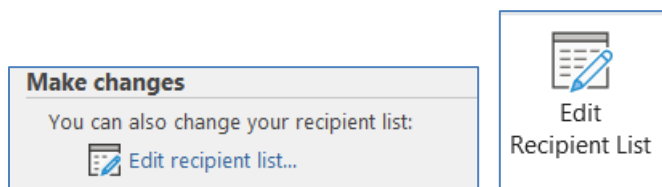
The following window will also be offered to select from everything.



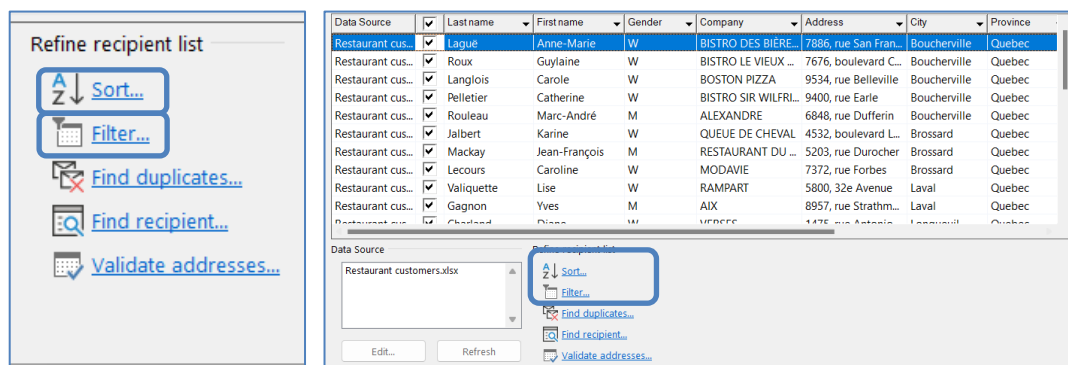
## VIEW FILTERED OR SORTED RECORDS

The Word mail merge tool has a sorting option on each field in the database, allowing you to set the order of the letters.

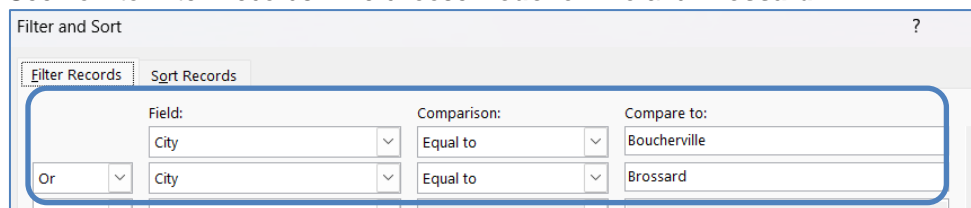
In step 3 of the wizard, click on the "Edit Recipient List" option.



- ✦ For example, click on the "City" heading to have the **Filter** applied.
- ✦ Click on Filter and choose Boucherville and Brossard



- ✦ See how to Filter Records if we choose **Boucherville** and **Brossard**



- ✖ More options with the **Filter Records**

- ✖ Then, we can **Sort Records**

- ✖ Click the OK button to confirm.
- ✖ The mailing preview now shows the letters or labels or directory with the city of **Boucherville** and **Brossard**.



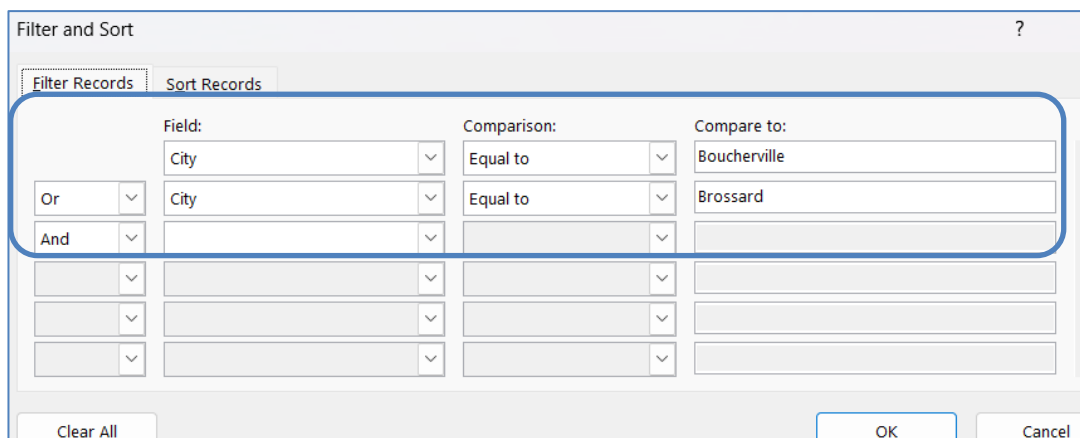
## CREATE A DIRECTORY



To create a directory and to **insert a table** to obtain data with a criterion (e.g. Boucherville or Brossard)

- ✖ Create a table: (one row and three columns)
- ✖ Start Mailings
- ✖ Database (**Table Word**) which is a Word document located in your Mailings folder.
- ✖ Insert the fields: first name, last name, and city
- ✖ Criteria: List of Boucherville and Brossard employees  
(Here is your criteria window below)





The 'Filter and Sort' dialog box has two tabs: 'Filter Records' and 'Sort Records'. The 'Filter Records' tab is active. It contains a table with three columns: 'Field:', 'Comparison:', and 'Compare to:'. There are three rows for filtering. The first row has 'City' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and 'Boucherville' in the 'Compare to:' column. The second row has 'City' in the 'Field:' column, 'Equal to' in the 'Comparison:' column, and 'Brossard' in the 'Compare to:' column. The third row is empty. There are also 'Or' and 'And' buttons to the left of the rows. At the bottom, there are 'Clear All', 'OK', and 'Cancel' buttons.

- ✱ Click on "Finish & Merge, then Edit Individual Documents..."

## Result of the "Directory"

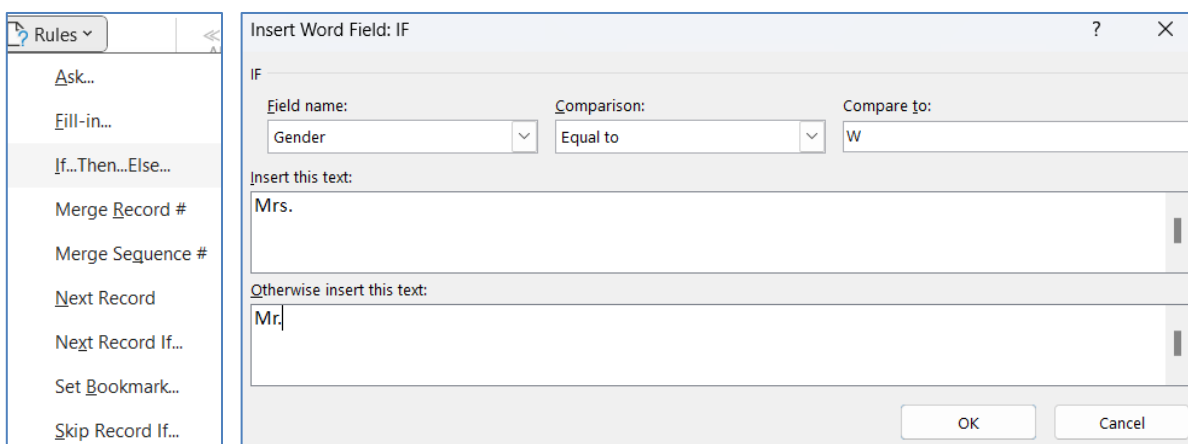
It is up to you to add a title line

First name	Last name	City
Anne-Marie	Laguë	Boucherville
Carole	Langlois	Boucherville
Karine	Jalbert	Brossard
Jean-François	Mackay	Brossard
Caroline	Lecours	Brossard



## RULES - IF... THEN... OTHERWISE...

This option allows us to insert conditional text based on the data contained in another field.



The 'Rules' dialog box is open, showing a list of rules on the left and the 'Insert Word Field: IF' rule selected. The 'IF' rule is configured with 'Gender' as the 'Field name:', 'Equal to' as the 'Comparison:', and 'W' as the 'Compare to:'. The 'Insert this text:' field contains 'Mrs.' and the 'Otherwise insert this text:' field contains 'Mr.'. At the bottom, there are 'OK' and 'Cancel' buttons.

For example, if you switch to field mode, you get:

{IF Gender is equal to "W" "Mrs."}

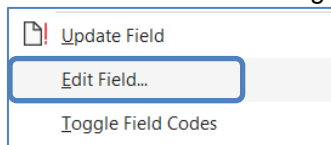
{Otherwise: is "Mr."}

Please respect upper or lower case.

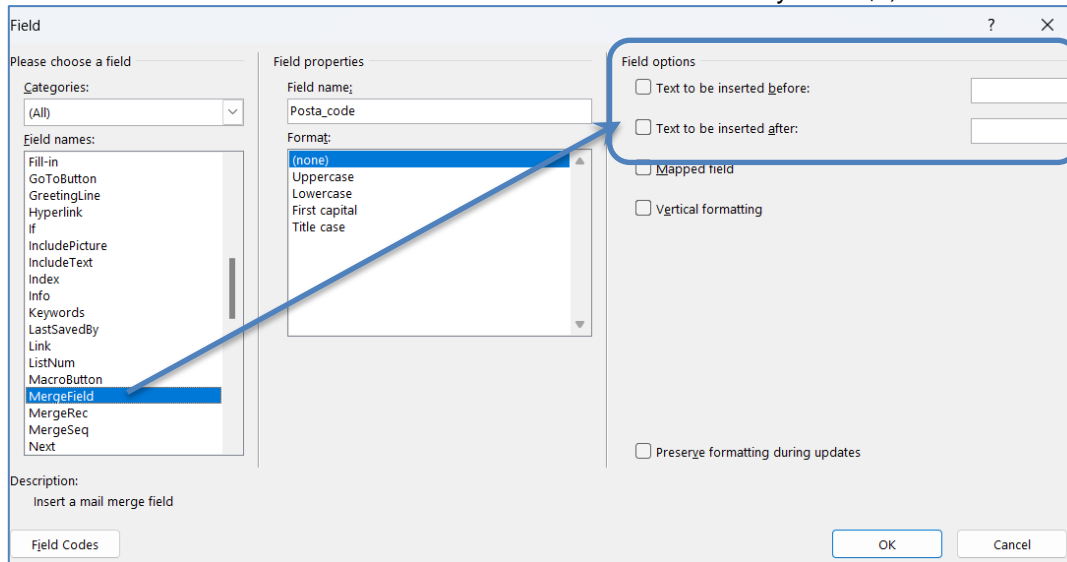


## MODIFICATION OF THE FIELD

- ✦ Right click in field, choose **Edith Field...**
- ✦ This results in the following screen:



Then use the text to be inserted afterwards and add the desired symbol "\$", "%" or other.



## "DATE" FIELD

Often when mailing from an Access or Excel table, the date format is in International English. Mon, June 3, 2024 will have the following format: 06/03/2024, although this date was entered in the format 2024-06-03.

The presentation of the dates can be changed by formatting the date field(s). To do this, after inserting all the merge fields,

- ✦ Select each field with a date
- ✦ Press Alt + F9 or SHIFT + F9, and you will see {MERGEFIELD}

### DATE\_Inscription}

- ✦ Position the cursor at the end of the field name, before the closing brace
- ✦ Add the \@ switches (backslash and arrobas) followed by a space and then the desired format constructed according to the table below. This format should include quotation marks at the beginning and end. Example " d MMMM yyyy"

Switch	Result
d	Day with a number (this will avoid 01, 02, but will give 10, 15, 31)

- ✦ **Dd** Day with two digits dddd      Day in full M      Month with a number

- ✖ **MM** Double-digit month **MMMM** Month in full yy Year in the double digits **yyyy** the year in four digits hh Time from 0 to 12 hours **HH** Time from 0 to 24 hours
- ✖ **mm** Minutes
- ✖ In bold, the most used formats.
- ✖ If we want to get 2024-06-03, we will add \@ " yyyy –MM-dd"

Date^: {·MERGEFIELD·DateRendezVous\@·"d·MMMM·yyyy"·}^

Heure^: {·MERGEFIELD·HeureRendezvous\@·"HH: mm"·}^

Pay attention to the mandatory space after the ":" in HH: mm



## CURRENCY TYPE FIELD

To get numbers with the currency symbol or to have decimals, you will also need to use a "\#" switch and the format

So #####.00 will allow a number such as \$222,240.50 to display correctly.

By omitting the 00s, the number will have no decimals

You can also use the "Edit Field" option obtained by the right clicking when positioned on the field to be modified.



## Screenshot



Even faster than screen printing and no need to trim

### Here is how to do it

- ✖ Open a new document
- ✖ Open a web page
- ✖ Choose an image
- ✖ Go back to your Word document and position yourself where you want the image
- ✖ From the **Insert** tab, group '**Illustrations**', select **Screenshot**, and choose **Screen Clipping** and take the latest one with the camera
- ✖ This will go back to your last display, which is the web page, then with the mouse, frame only the part of the image you want to keep.
- ✖ This image or text box can be saved as an "Image"

## Object

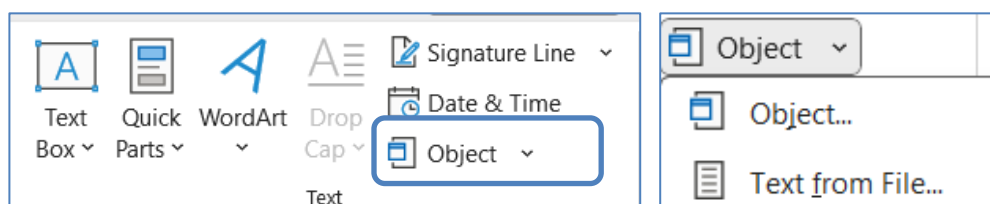
There are times when you need to insert in a Word report for example, pdf documents, an Excel spreadsheet, a PowerPoint presentation, or another Word file and other instead of a copy and paste.

You can even insert objects linked to the source files, in the case of external documents that are scheduled to be updated, so that they are automatically updated in the main document where they were inserted as soon as they are opened. This method simply uses insertion links to avoid storing all linked files.

Your files can therefore be inserted as text, object, or simply as an icon.

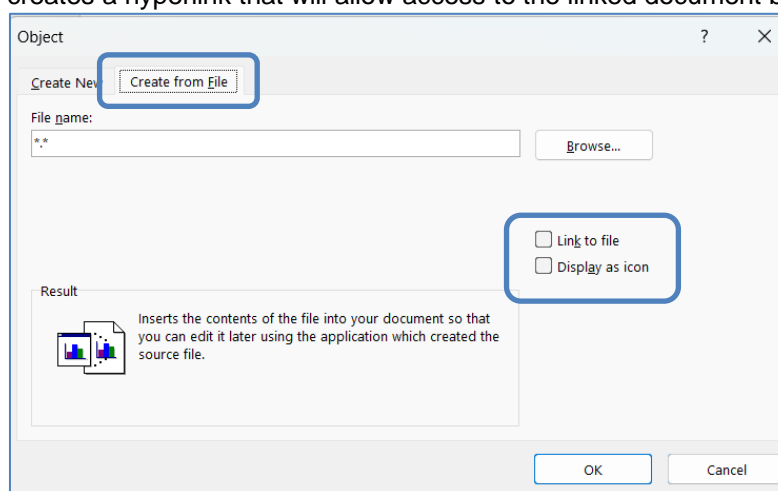
### Process:

From the Insert tab, go to the Text section and click the Object icon.



### What you can insert:

- ✖ To create a document **from a file**, click the tab of the same name, click **Browse**, choose document from your browser. If necessary, click **Link to File**. The **View as icon** choice creates a hyperlink that will allow access to the linked document by a simple double click.



## Note

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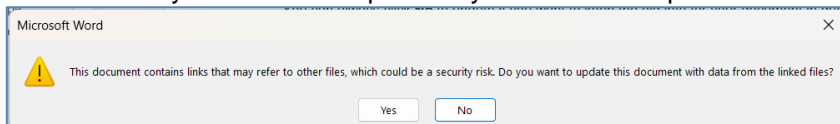
---



## LINK TO FILE

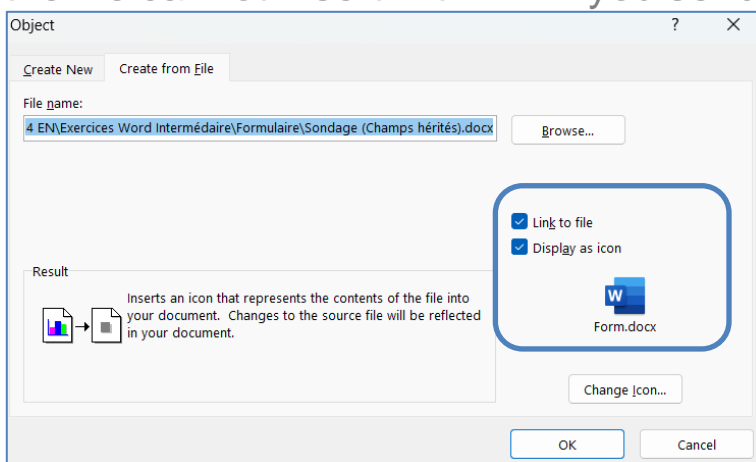
In case you have inserted objects with links, Microsoft Word will display a dialog box asking if you want to update these links each time you open them.

You can always click **No** to update if you want to keep the old info for your document in question.



## SHOW AS ICON

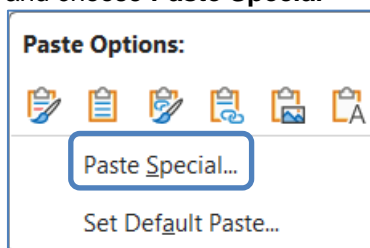
This option is very interesting, **insert a file into a file**, obviously, the file cannot insert with link if you send this document by email.



## COPY & PASTE WITH LINK

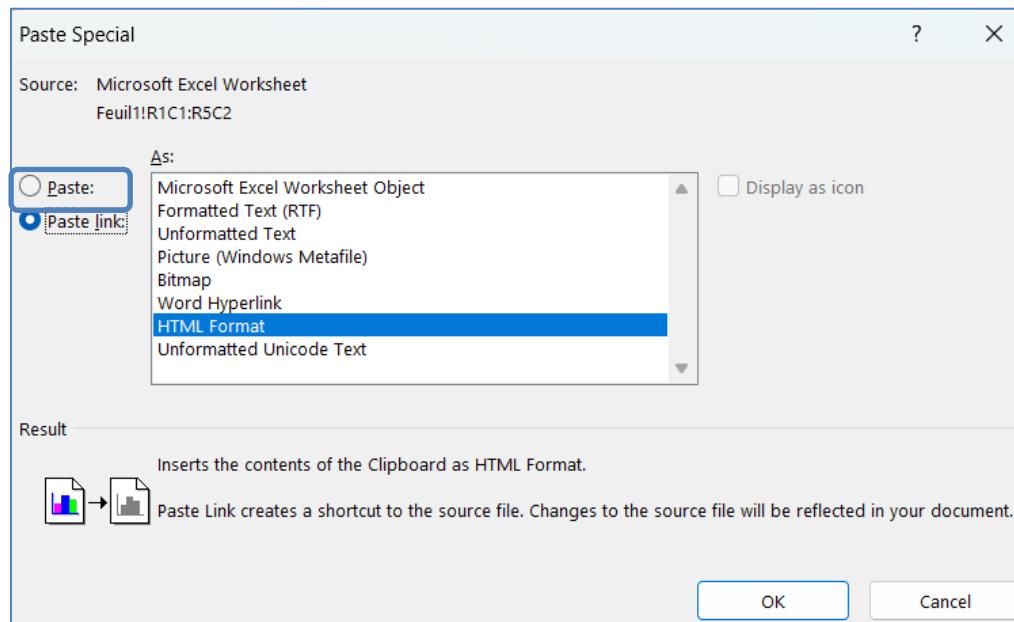
See how you can proceed with copy & paste with link.

- ✦ Open the document "Endangered Animals" and the Excel file "**Chart\_Data**"
- ✦ Copy the table from Excel
- ✦ Go to the end of the Word document, and choose **Paste Special**



- ✦ Make changes in Excel and see the result

- ✖ Repeat the copy and paste with link, but this time with the graph that you will drop after the table
- ✖ This method is the same for paste with link in PowerPoint.



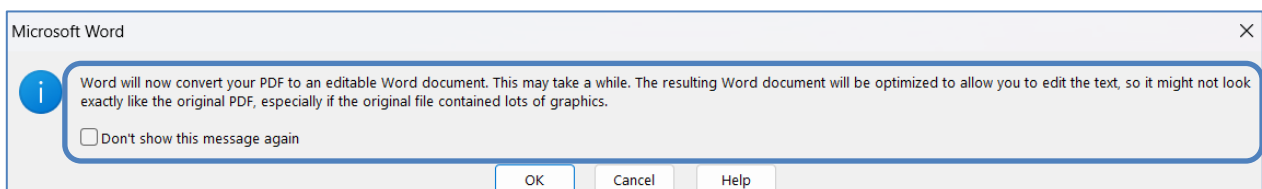
## Convert a PDF document to Word format

### WHY CONVERT A PDF TO WORD FORMAT?

Because we want to extract part of the document to avoid having to retype it all

#### How to do it?

- ✖ Open Word
- ✖ From “**Open** “, go to a PDF document you have or **Open "Bengal tiger.pdf" file**
- ✖ Observe the window below



- ✖ Obviously, if the PDF document is in image format (scanned document), this option will not be available.

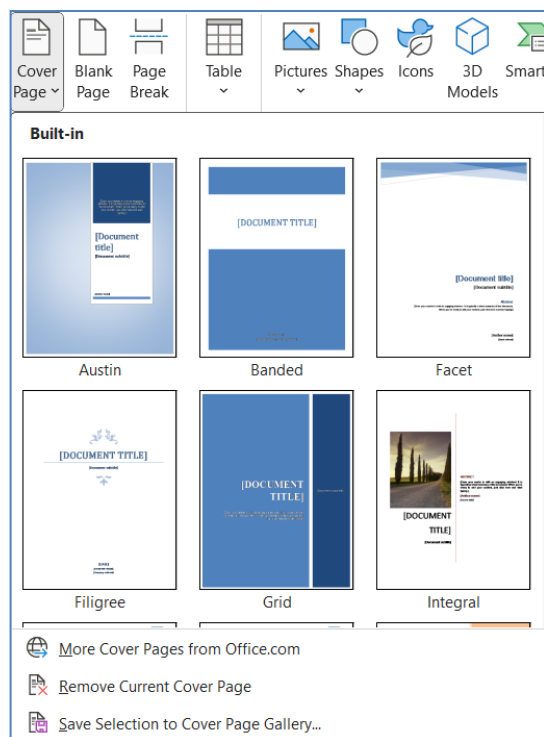
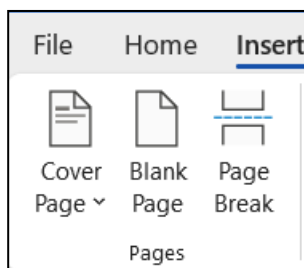
**Be careful, errors are possible, e.g. non-breaking space, displaced image**

## W Cover Page

A cover page is the first page of a document. We will be able to insert this cover page, from the "Insert" tab, of the "Pages" group.

We can easily add new **Cover Page** in our auto-inserts that can be found in the Tab **Insert** **Quick Parts**

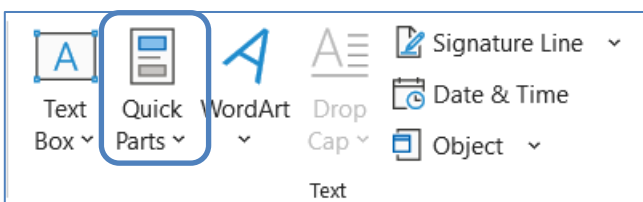
Or by selecting your page and adding it to: "Save Selection to Cover Page Gallery..."



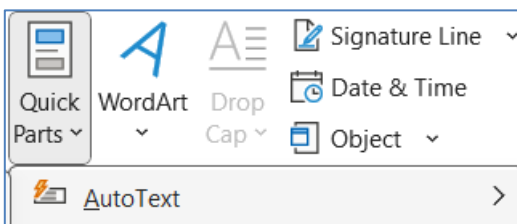
## W Quick Parts

You can use the **Quick Parts Component Gallery** to create, store, and reuse content items, including auto-Insert, document properties (for example, title and author), and fields. These reusable content blocks are also referred to as *building blocks*. **AutoText** is a common type of building blocks that contain text and graphics. You can use the **Building Block Organizer** to search for or edit a building block.

To open the Quick Parts Component Gallery, on the **Insert** tab, in the **text** group, click **Quick Parts Components**.



## 📄 AUTOTEXT IN QUICK PARTS





## INSERT YOUR SIGNATURE INTO AUTOTEXT

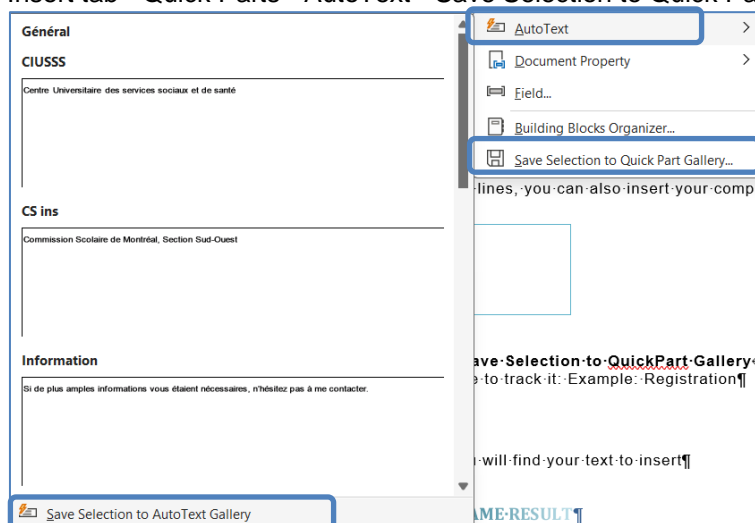
- ✦ Click where you want a field to be inserted
- ✦ Type your full name, as well as 2 or 3 lines, you can also insert your company logo

TYPE IN YOUR NAME

Phone: 555-555-5555

Email: prenom.nom@bell.net

- ✦ Select All
- ✦ Insert tab - Quick Parts - AutoText - Save Selection to Quick Part Gallery

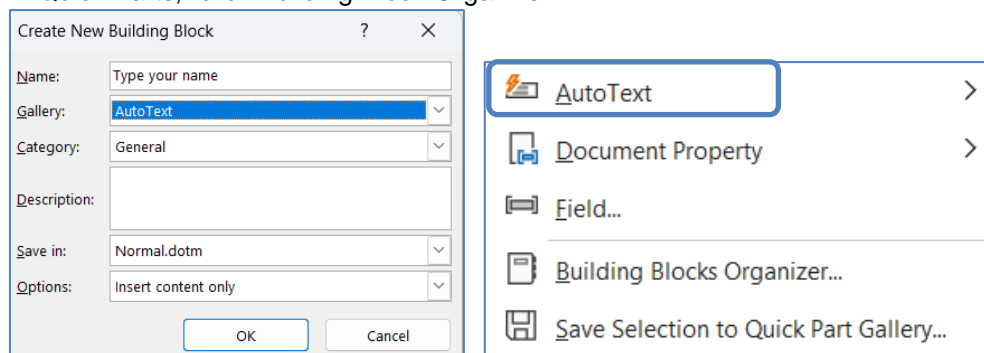


- ✦ Give your **AutoText** a name to be able to track it: Example: Registration
- ✦ Closes without saving
- ✦ Open a new document
- ✦ Insert tab – **Quick Parts** – **AutoText**, you will find your text to insert



## ANOTHER METHOD TO ACHIEVE THE SAME RESULT

- ✦ In Quick Parts, "click Building Block Organizer"



- ✦ In the Gallery area, click an AutoText
- ✦ Give it a **name**





## EXERCISE "HEADER" GALLERY

---

1. Type the text below
2. Select and Save to the **"Header" Gallery**

Formation CAD (CAD Academy)

400 St-Martin Blvd. West

Suite 200, Laval, Quebec H7V 3Y8



We just add a **Header** into the **Header Gallery**.

Now, you understand how to add a **Footer** in **Footer Gallery**



## EXERCISE - QUICK PARTS – AUTO TEXT

---

1. Type the text below
2. Insert a tab for the last 3 lines: 6.5cm, left stop
3. Select All (CTRL+A)
4. **Insert tab - Quick Parts – Auto Text - Save Selection to Quick Parts Gallery**
5. Give your **AutoText** a **name** to be able to track it: Example: Registration
6. Close without saving
7. Open a new document, insert your page header from previous exercise, located in the Gallery (**Header**)
8. Also insert this one (Registration). Insert tab - **Quick Parts – Auto Text**.

## REGISTRATION IN OFFICE AUTOMATION

FIRST AND LAST NAME:

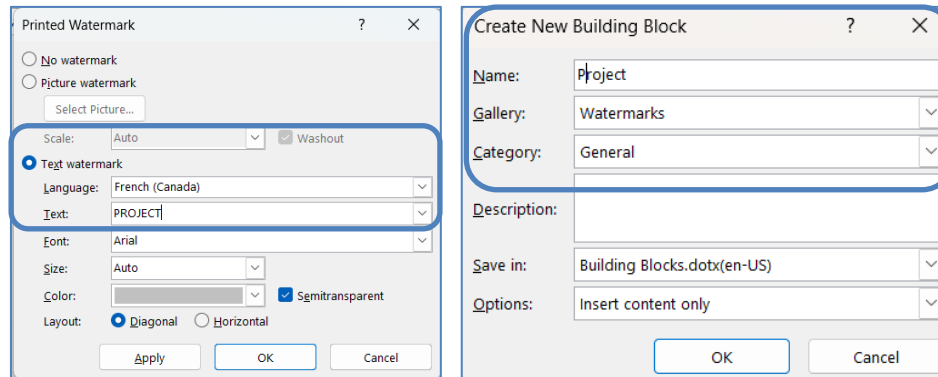
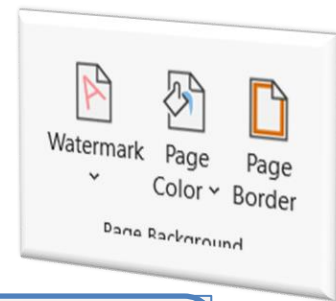
TRAINING DATES:

COURSE TITLE:

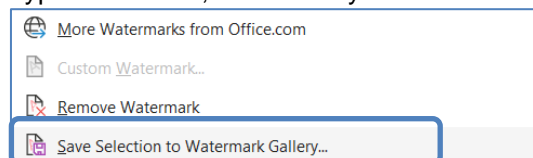


## ADD AN ITEM TO THE WATERMARK GALLERY

- ✦ Open a new document
- ✦ To insert the "**PROJECT**" Watermark, click **Design** (Layout in previous versions)
- ✦ Click **Watermark** in the **Page Background** group
- ✦ Click Custom Watermark...
- ✦ Click **Text Watermark**, type PROJECT  
Click OK



- ✦ To keep **PROJECT** in the gallery, double-click in a page header
- ✦ Click on the word **PROJECT**
- ✦ From **Watermark in Design**, click **Save Selection to Watermark Gallery...**
- ✦ Type **PROJECT**, make sure you are in the correct gallery, and click **OK**

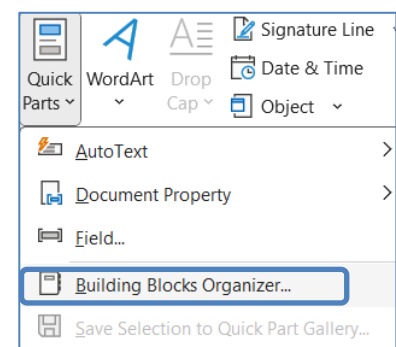


- ✦ Open an existing document and choose **PROJECT** from the list
- ✦ This new watermark belongs in your gallery now.

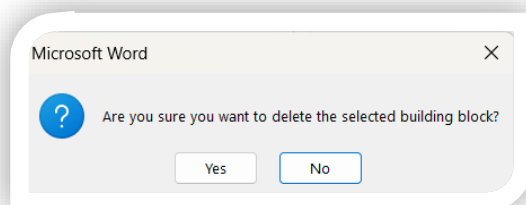
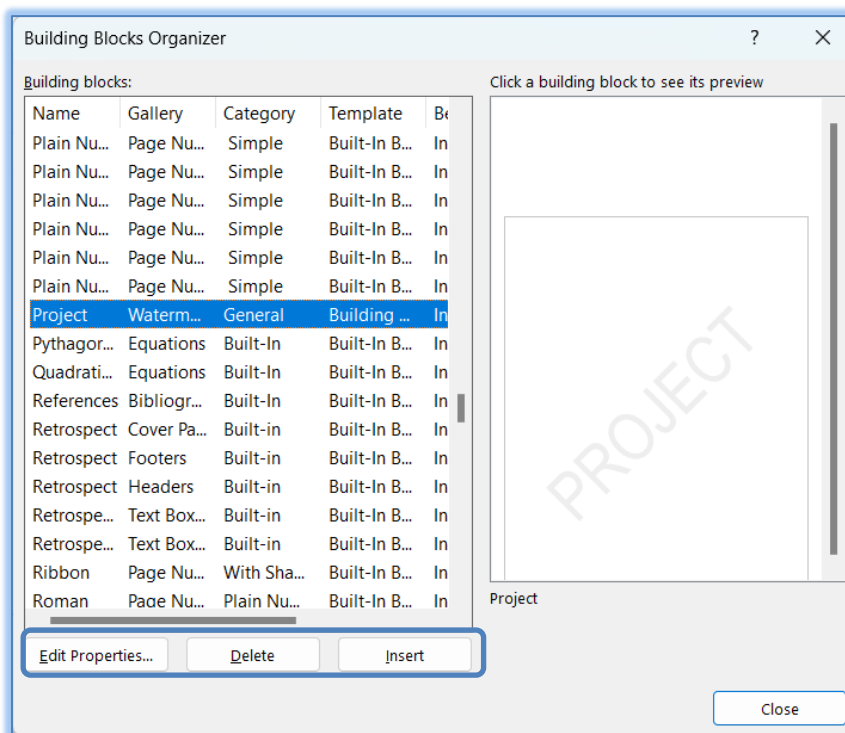


## DELETE A QUICK PARTS

- ✦ In **Quick Parts**, click "**Building Block Organizer**"
- ✦ You can sort by "Name or Gallery or Category" and then "Delete"
- ✦ To Edit an AutoText
- ✦ Insert it, repeat the steps to save to the Gallery under the same name



- ✱ A message will ask you to **Delete** or **Insert** or **Edit Properties...**, click " YES"



In the Forms documentation, we are going to experiment, **Save to Custom Gallery....** Because we can also use Quick Parts in a form.

## Templates & Forms

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1. Enable the “**Developer**” tab in the ribbon
  - ✦ File, Options, Customize Ribbon, check Developer



### USING A TEMPLATE

---

When creating a new document, Word is always based on a basic document called a "template". This can be either Normal.dotx or Normal.dotm. if it contains macros.

A template is not a document like any other, it differs from a standard document by:

- ✦ The extension of his name
- ✦ The way it opens
- ✦ The folder where it should be stored
- ✦ The automatic insertions and building blocks specific to this model
- ✦ Styles specially associated with this model
- ✦ The macro commands included in this model

**The default document template in Word is called NORMAL.DOTX or .DOTM. The blank document that opens automatically when Word is launched is based on this template:**

- ✦ File, New, Click Template Name
- ✦ Word gives you access to a copy of your template (e.g. Document1)
- ✦ Enter data
- ✦ Save and Word automatically prompts you for a new name for the file



### CREATING A TEMPLATE:

---

1. Create the document that will serve as a template for other documents
2. File, **Save As**, give the file a name
3. In File Types, Click **Template**
4. Word will automatically put the DOTX extension to your file (e.g. fax.dotx). If it must contain macros, use the DOTM extension



### EDIT A TEMPLATE:

---

1. Open Word, then open your template
2. Click on the name of the template
3. Make changes
4. Save and give the same name. Word will ask you if you want to replace the existing file.



## DEVELOPMENT OF THE FORM

First, establish the margins of the document, the sections if desired, the headers or footers of the entire document.

Then create a table or set up the tabs so that the fields are arranged in the right places.



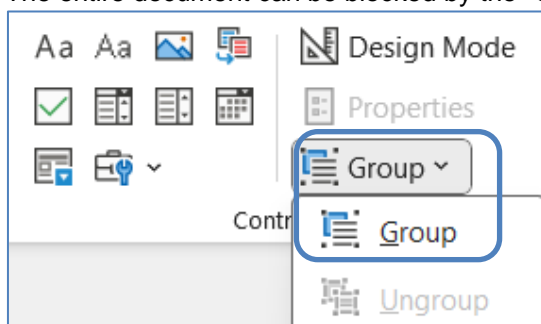
## DIFFERENTIATING BETWEEN CONTENT CONTROLS AND LEGACY FIELDS

Content controls to be used if all users have 2007 or newer.



## BENEFITS:

- ✖ More control types including rich text, images, and calendar for date selection
- ✖ The document does not have to be protected, so advantage for accessibility, spelling, etc.
- ✖ The entire document can be blocked by the "**Group**" button



- ✖ It can be programmed so that it is destroyed or unlinked after it has been filled
- ✖ Possible links to XML data source



## DISADVANTAGES:

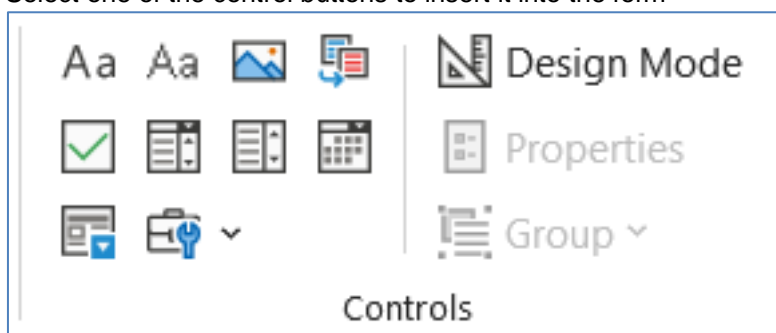
- ✖ Inability to save only data in a Word document
- ✖ You cannot easily link a macro to a control
- ✖ You cannot give a format to a control (\$)
- ✖ You cannot do calculation
- ✖ You cannot limit the length of an entry
- ✖ It cannot be used in the 2003 version
- ✖ Content controls and inherited fields can be combined

## Creating a form with new controls




- ✖ Most beautiful (Blue-Grey)
- ✖ Easy for users to use and understand
- ✖ Styles can be applied to them
- ✖ Their modification and deletion can be prevented

### INSERTING A CONTENT CONTROL

- ✖ Position the cursor where the control should be inserted
- ✖ Make sure "Developer" mode is enabled
- ✖ Select one of the control buttons to insert it into the form

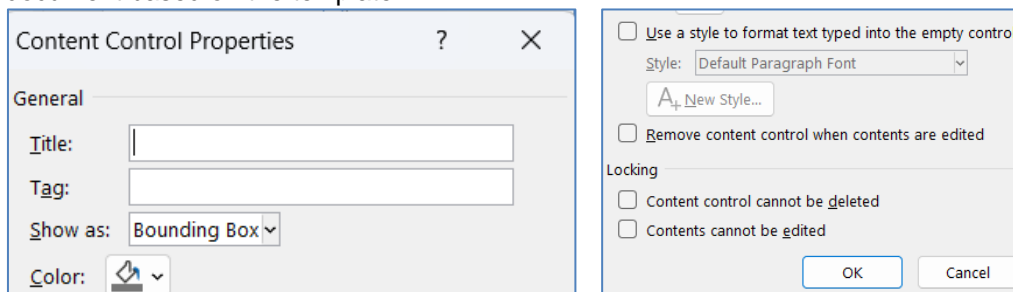


BUTTON	DESCRIPTION
Aa	Rich Text - Allows input of text that can be formatted (bold, italics, etc.)
Aa	Inserts a Text field for data entry. Text input without formatting
	Combo: Inserts a drop-down list field, allowing you to choose from a list. <b>Other values can be entered</b>
	Inserts a drop-down list field, allowing you to choose from a list. <b>No other values can be entered</b>
	Where a user will be able to choose a "Quick Parts" from the specified gallery
	Inserts an Image control
	Allows you to insert a date selection control
	Checkbox - Displays an "on/off" switch New in 2010
	Repetitive Content Control

BUTTON	DESCRIPTION
 Properties	A control is generic when inserted. The context must be given through the properties window
 Design Mode	We will utilise <b>Design Mode</b> to replace text inside the control
 Legacy Forms	Inserts another tool (version 2003) or Activex control

## VALUES COMMON TO ALL CONTROLS

- ✖ Title: The name given and displayed at the top of the control
- ✖ Select the Do not delete content control check box, which allows the content of the control to be edited but prevents the actual control from being deleted from the template or from a document based on the template.

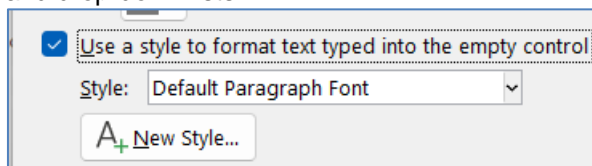


The image shows the 'Content Control Properties' dialog box. The 'General' tab is active, showing fields for 'Title', 'Tag', 'Show as' (set to 'Bounding Box'), and 'Color'. The 'Locking' tab is also visible, showing checkboxes for 'Use a style to format text typed into the empty control' (unchecked), 'Remove content control when contents are edited' (unchecked), 'Content control cannot be deleted' (unchecked), and 'Contents cannot be edited' (unchecked). The 'Style' dropdown is set to 'Default Paragraph Font'.

- ✖ Select the Do Not Edit Content check box, which allows you to delete the control, but not to edit the content of that control.

## STYLE OPTIONS

- ✖ By default, the field takes the formats of the paragraph to which it belongs. However, it is possible to apply a particular style to the field. A style can be applied to plain text, rich text, and drop-down lists.



The image shows the 'Content Control Properties' dialog box with the 'Style' options section highlighted. The checkbox 'Use a style to format text typed into the empty control' is checked. The 'Style' dropdown is set to 'Default Paragraph Font'. The 'New Style...' button is visible.



## MULTI-PARAGRAPH TEXT OPTIONS

- ✦ For plain text only, the "Enter" key can be used to have multiple paragraphs.

Plain Text Properties

☒ Allow carriage returns (multiple paragraphs)

OK Cancel



## OPTIONS TO REMOVE CONTENT CONTROL

- ✦ For plain and rich text, it is allowed to delete the title and its tab when a field is populated. This causes the text to appear to have been entered off-screen.



## LIST OPTIONS

- ✦ You have the choice between an editable or non-editable drop-down list

Drop-Down List Properties

Display Name	Value
Choose an item.	
Visa	Visa
Cash	Cash

Buttons: Add..., Modify..., Remove, Move Up, Move Down

OK Cancel



## DATE OPTIONS

- ✦ Select the format in which the date is displayed according to the location.

Date Picker Properties

Display the date like this:

yyyy-MM-dd

2024-02-24  
samedi, 24 février 2024  
24 février 2024  
24 02 24  
24-févr.-24  
2024/02/24  
24 févr. 24  
24/02/24

Locale: French (Canada)

Calendar type: Gregorian

Store XML contents in the following format when mapped: Date and Time (xsd:dateTime)

OK Cancel

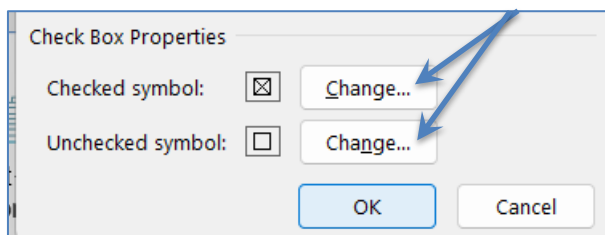




## CHECKBOX OPTIONS

It is possible to control the appearance of the checkbox whether it is checked or not. By default, a square is presented, but it is possible to modify this square with another symbol.

- ✦ Change the color
- ✦ Change the size

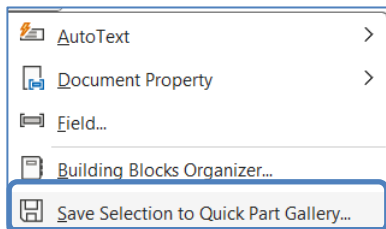
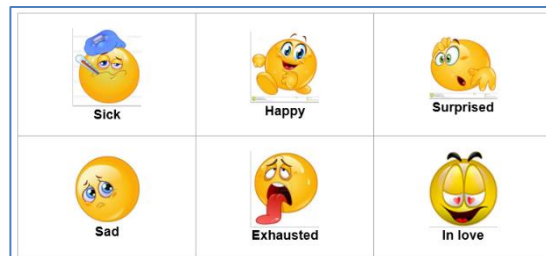


## HOW TO CREATE AND INSERT A BUILDING BLOCK

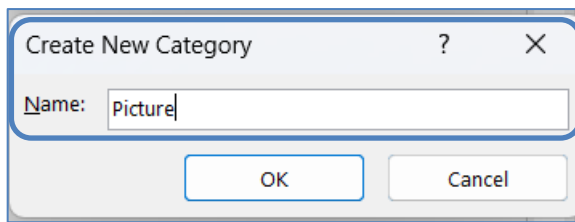
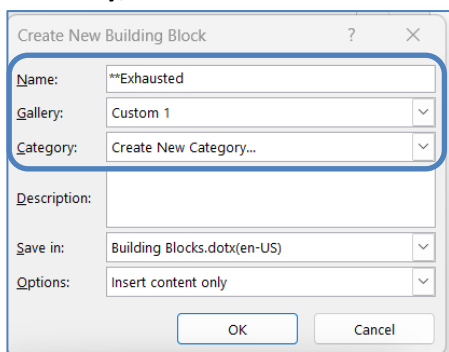
All auto-inserts, building blocks, and equations are available when using this field. You can choose a category from a gallery.

First, if your goal is to have a form filled out with a building block, you need to save your document as a **TEMPLATE**.

1. Open the **Building Block** file
2. Save as **Template** and keep the same name
3. Select an image
4. Click **Insert**, then **Save Selection to Quick Parts Gallery...**

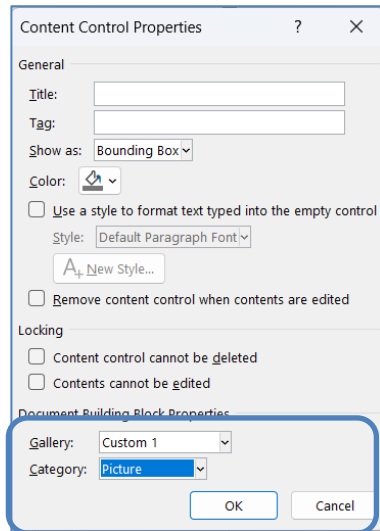


5. Give a new name if needed
6. In **Gallery**, choose **Custom 1**



7. In **Category**, create a **new category** called **Picture**
8. Repeat the same process to save at least 3 or 4 images in the same category

9. To insert your building block where you want it, click the button in the **Controls** group.



10. Click on **Properties** to choose your **gallery** and **category** and see the result.

## LEGACY FORMS



BUTTON	DESCRIPTION
	Inserts a text field
	Inserts a checkbox field.
	Drop-down list
	Inserts a frame.
	Displays field areas in gray (making them easier to spot).
	Resets the form.

## ADD PROTECTION TO THE FORM.

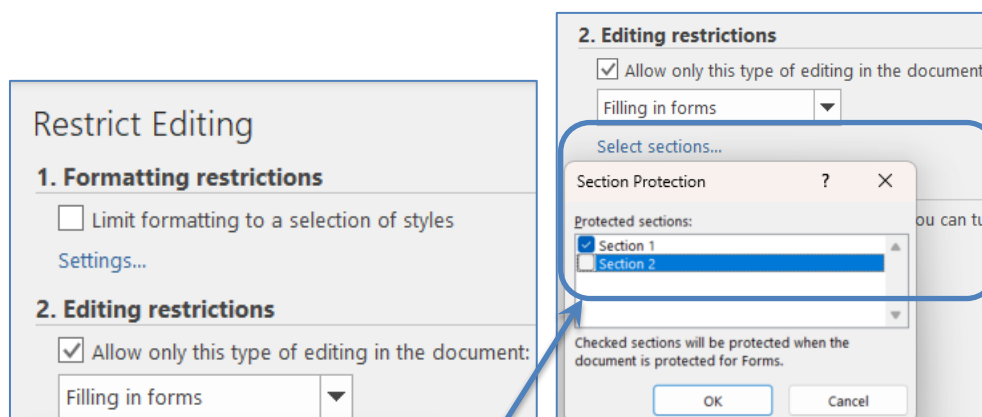
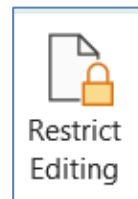
Once the **inherited** fields have been inserted into the form and the formatting and layout has been done, it must be locked to prevent some of the text from being erased and to make the fields operational.

You can protect each content control in a template to prevent someone from deleting or modifying a particular content control or group of controls, or you can password-protect all content in the template.



## PROTECT ALL CONTENT ON A FORM

- ✦ Open the form you want to protect.
- ✦ On the Developer tab, in the Protect group, click Protect Document, and then click Restrict Editing.
- ✦ In the Protect Document task pane, in **Restrict Editing**, select the Allow only this type of editing in the document check box.
- ✦ From the list of Editing restrictions, select Filling in forms.
- ✦ In Enable Protection, click Enable Protection.
- ✦ To assign a password to the document so that only reviewers who know it can remove the protection, type a password in the Type a new password (optional) box, and then confirm it.
- ✦ Important If you choose not to use a password, anyone can change your change restrictions.



## LOCKING SECTIONS

This type of lock makes it possible to make an area of the form accessible, previously formatted by a section. You can then unlock an entire section, for example to enter a large amount of text. It is preferable to choose a Continuous section break here if you want to get the data on the same page.

- ✦ Make sure there are at least two sections in your form. Move the cursor to the section you want to unlock.
- ✦ Click TOOLS – DOCUMENT PROTECTION.
- ✦ Choose Form, then...
- ✦ Specify the **sections** to be protected.

## Note

## Create or run a macro

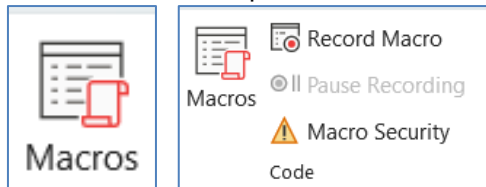
In Word, you can automate common tasks by creating and running macros. A macro is a series of commands and instructions that you group into a single command to automatically execute a task.

To save time on tasks you do often, group the steps into a macro. First, you record the macro. You can then run the macro by clicking a button in the quick access toolbar, or by pressing a key combination. It all depends on how you set them up.

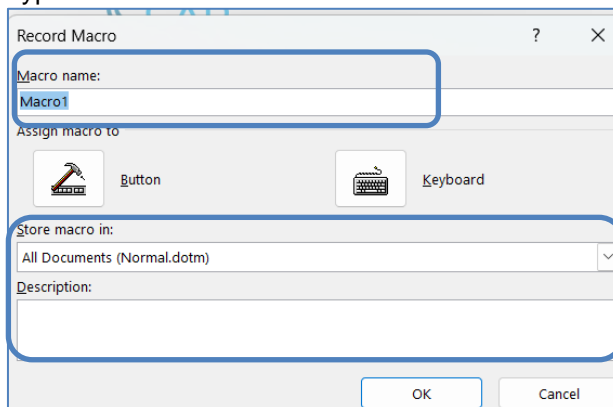


### CREATE A MACRO

- ✦ Click View or Developer - Macros - Record Macro.



- ✦ Type the name of the macro.



- ✦ To be able to use this macro in all your new documents, make sure that the Store macro in box contains All Documents (normal.dotm).
- ✦ Now it is time to record the steps. Click the controls or press the keys for each step of the task. Word records your clicks and keystrokes.

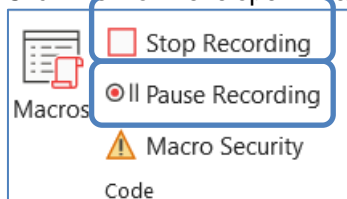
### EXAMPLE

1. **Orientation** in the layout (**Landscape**)
2. **Margin**: Top and bottom at 3cm, Left's 4cm and right at 2.5 cm
3. Create a page header with a logo and your company name
4. Create a footer
5. Insert the watermark of your choice
6. Create a page border, In this section, only the first page



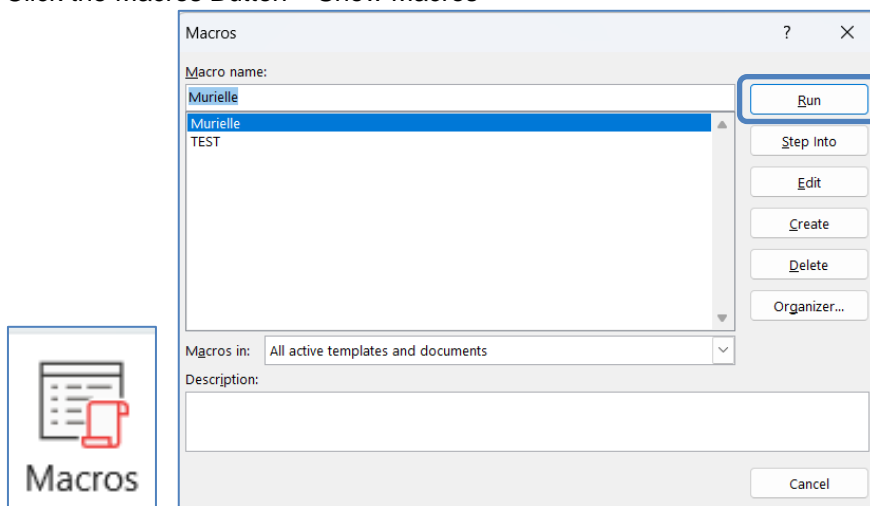
## TO STOP RECORDING,

- ✱ Click View or Developer - Macros - Pause Recording.



## TO RUN THE MACRO

- ✱ Click the Macros Button – Show Macros

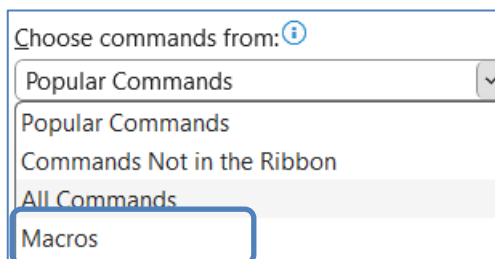
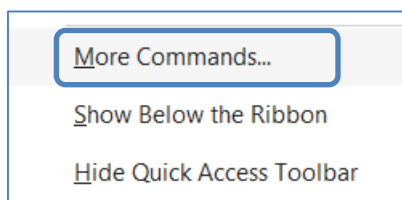


- ✱ Select your macro, and then select **Run**



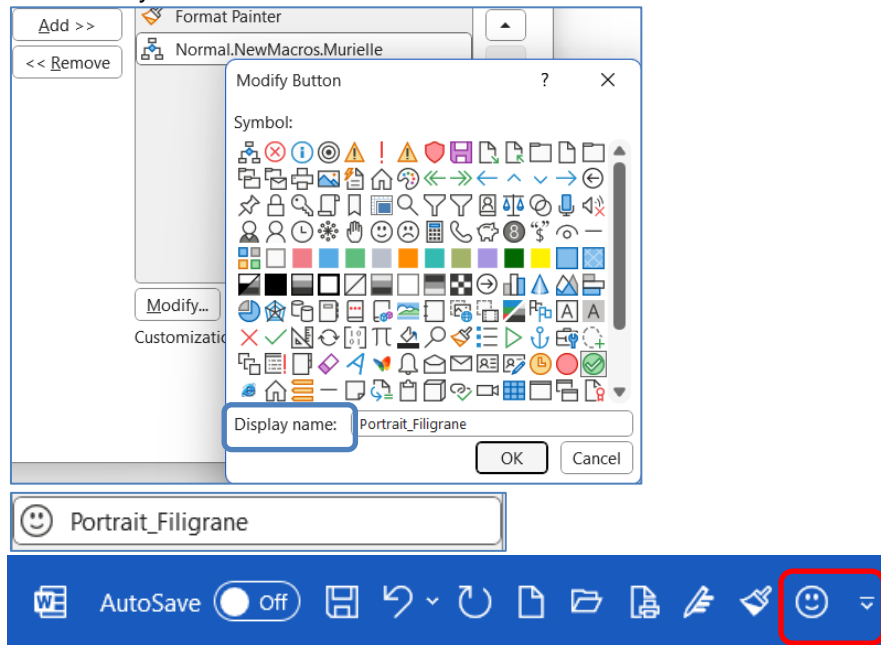
## ADD THE MACRO TO YOUR QUICK ACCESS TOOLBAR

- ✱ Click Customize Quick Access Toolbar
- ✱ Choose More Commands
- ✱ Click Popular commands from:



- ✱ Click **Macros**
- ✱ Click **Add**

- ✱ Click Modify

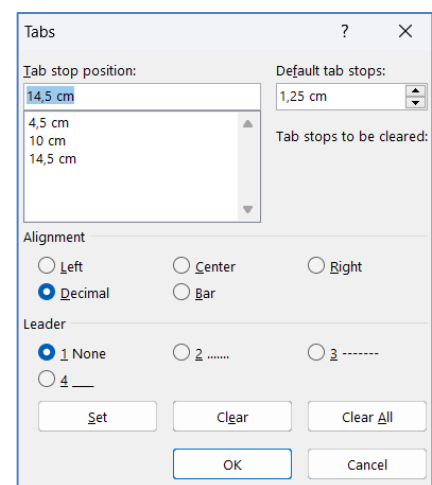


- ✱ Choose a **button image**, enter a **name of your choice**, and then click OK

## Additional Exercises

### EXERCISE 1 - TAB

- ✱ Open a new document
- ✱ Apply the following stops from the Tab dialog box
- ✱ Type 4.5 cm in the Position text box
- ✱ Make sure that the Left option in the Alignment group and the None option in Leader
- ✱ Click Set
- ✱ Type **10** in the Position **text box**, this measure replaces the previous entry
- ✱ Select the **Center** option in the **Alignment group**
- ✱ Click **Set**
- ✱ Type 14.5 in the Position text box
- ✱ Select the **Decimal** option in the **Alignment group**
- ✱ Click **Set**, then click **OK**
- ✱ **Observe the TABS on the ruler**



Type the text below

Product	Product Code	Quantity	Price
Cellular	CE1343	40	215.00
Radio	RA3459	30	87.50
CD player	LL3987	25	136.75
TV	RL9543	9	4 345.00

Modification to do:

- ✦ TAB 14,5 Decimal to be replaced by **Right** Alignment
- ✦ Move manually this TAB to the end of your paragraph
- ✦ Save as: "**Tab**"



## EXERCISE 2 - TAB

Reproduce the text below:

Insert Symbol ✂ (In Wingdings)  
Change the size and the color of your scissor

First name: \_\_\_\_\_ Last name: \_\_\_\_\_

Address: \_\_\_\_\_ City: \_\_\_\_\_

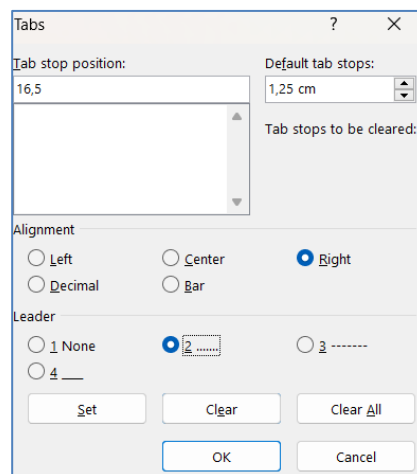
Province: \_\_\_\_\_ P.O. Box: \_\_\_\_\_ Date: \_\_\_\_\_

----- ✂ -----



## EXERCISE 3 - TAB

- ✦ Open the "**Resto Acropolis**" file
- ✦ Select the entire document (**CTRL A**)
- ✦ Open Paragraph, Tab
- ✦ Type 16.5 cm and select the **Right** option from the **Alignment** group
- ✦ Select option No. 2 in **Leader** and **set**
- ✦ Change **Layout**, **Vertical** Alignment:  
Take the time to see the difference between **Justified** and **center**



Margins Paper **Layout**

Section

Section start: New page ▼

☐ Suppress endnotes

Headers and footers

☐ Different odd and even

☐ Different first page

From edge: Header: 1,27 cm

Footer: 1,27 cm

Page

Vertical alignment: Justified ▼

Top

**Center**

Justified

Bottom

*Restaurant Acropolis*

*Menu of the day*

*Soups*

Poultry consommé.....	4.50
French Onion Soup.....	4.75
Tomato soup.....	3.25
Cream of leek.....	3.00

*Salads*

Caesar Salad.....	4.75
Chef's Salad.....	2.25
Spinach salad.....	3.25

*Fish*

Lobster and shrimp.....	18.25
Oysters in sabayon with white wine.....	18.75
Salmon marinated in green pepper.....	8.75
Rainbow trout.....	8.50

*Poultry*

Chicken supreme stuffed with herbs.....	9.75
Duck à l'orange.....	12.50
Mustard Marinated Chicken.....	11.25
Pheasant cooked in a casserole with Madeira.....	18.75

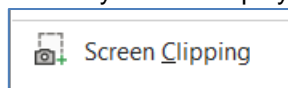
*Thank you and see you next time!*



## EXERCISE - PROTECTION/COVER PAGE/SCREENSHOT

### Objectif: Screenshot – Cover Page – Properties – Protection

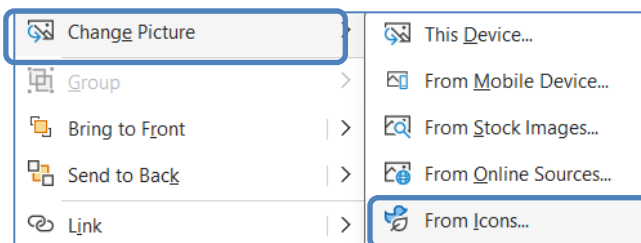
1. Open the **Endangered Animals** file and save it under the new name "Save the planet"
2. Open your Internet browser and look for an image of a tiger. Go back to Word without closing the browser and place the cursor between 2 paragraphs (where you want your picture).
3. From the Insert/Capture/Screen Clipping, the latest one with the camera. This will go back to your last display, which is the web page.



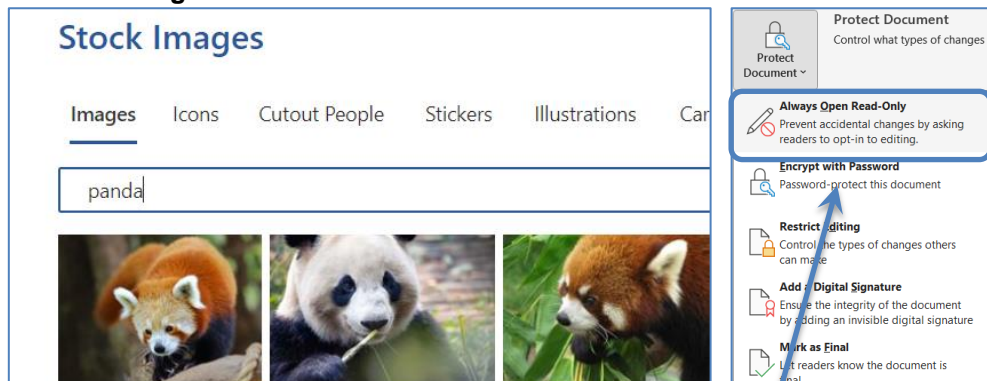
4. Then with the mouse, frame only the part of the image you want to keep
5. Repeat step 2-3-and 4 to get a picture of Great white shark
6. Insert one of the cover pages containing an image and a short summary – **Insert/Cover Pages**. Edit the photo with a photo of your choice that is related to the theme of the document.



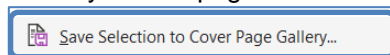
- Click on the image – Click on the "**Change Image**" button from the **Image Tools** tab.



- Type Panda or Tiger or White Shark
- Insert the **Image**



- Give a name to your document (File – Info – Title) **SAVE THE PLANET**
- Select your first page and Save in your Galley Cover Page

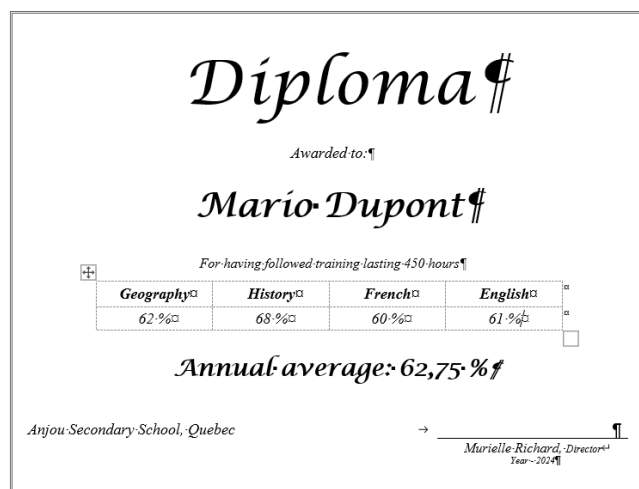
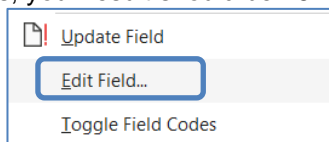


- Open a new document and verify if your Cover page is available.
- Protect your file as read-only to prevent your document from being altered.  
File/Info/Protect Document/Choose Always Open Read-Only



## EXERCISE – MAILINGS WITH LETTERS

- Open: **Diploma**
- Start Mailings
- Use the Excel database: **School result**
- Insert Fields: Name – note and average
- Criteria: THE AVERAGE MUST BE GREATER THAN OR EQUAL TO 60
- You want to see % at the end of each Field, choose **Edit Field** and add % after field
- Merge to a new document and check the number of pages, your result should be 26 pages to print.





## EXERCISE – FORM

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From the "Video Sheet.dotx" template, create a form according to the following instructions: (Remember, you need to open the TEMPLATE with WORD (File – Open)

1. Movie Title must contain a **plain text field**
  - ✦ Use a style to format content (**Heading 1**)
  - ✦ Check: Do not remove content control
2. Release Date must contain a Calendar check
  - ✦ Select the format "**d mmmm yyyy**"
3. Movie Description: Insert a **Rich Text Control**
  - ✦ Enable Delete Content When...
4. In the cell to the left of the "**With violence**" row, insert a building block
  - ✦ Select blocks from the Custom **1 gallery** and "**Movie**" **category**
5. Under the Violent text, insert a "**Checkbox**" content control
  - ✦ Increase size to 16 points
  - ✦ Change the symbol to another of your choice.
6. For "Duration" and "Featured" texts, insert "**Plain Text**" controls
7. After the text Collation, insert a non-editable drop-down list control
  - ✦ Enter the following 4 choices: General, 13+, 16+, 18+
8. After the "Company" text, insert a Drop-down list (editable) control
  - ✦ Enter the following choices: Astral, Universal Pictures, Walt Disney
9. In the cell to the left of the "**Movie Description**" text, insert an image control
10. Save your template and close it
11. Create a new document from your template and enter data for the last movie you saw.