

THE EXPERT'S VOICE® IN OFFICE

Beginning Microsoft Word 2010

*All you need to get started
with Microsoft Word 2010*

Ty Anderson and Guy Hart-Davis

Apress®

Beginning Microsoft Word 2010



**Ty Anderson
Guy Hart-Davis**

Apress®

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About the Authors



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Introduction

Do you need to get your work done with Microsoft Word—smoothly, easily, and quickly? If so, you’ve picked up the right book.

Who Is This Book For?

This book is designed to help beginning and intermediate users get up to speed quickly with Word 2010 and immediately become productive with it.

If you need to learn to use Word to accomplish everyday tasks, at work or at home, you’ll benefit from this book’s focused approach and detailed advice. You can either start from the beginning of the book and work through it, or use the Table of Contents or the Index to find the topic you need immediately, and then jump right in there.

What Does This Book Cover?

Here’s what this book covers:

- **Chapter 1**, “The Word 2010 Primer,” shows you how to work with Word’s Fluent User Interface, using the Ribbon, the Quick Access Toolbar, and the new Backstage view to control Word. You’ll also learn how to create and save documents, plus how to view a document’s structure.
- **Chapter 2**, “Creating and Editing Documents,” explains how to write text, how to edit text, and how to correct errors in it. You’ll also learn how to use Word’s powerful Outline view, how to paste content in the format you need by using the Paste Options feature, and how to find and replace text.
- **Chapter 3**, “Adding Style to Documents,” covers the use of Word’s most important types of formatting. You’ll learn to format documents swiftly and efficiently by using styles, and how to add headers and footers to identify pages and make their content clear.
- **Chapter 4**, “Reusing Content,” shows you how to make the most of Word’s many features for reusing content you’ve already created. You’ll get the hang of building documents from Quick Parts, create AutoCorrect entries to save you time and effort, and tame the helpful but volatile AutoFormat As You Type feature.
- **Chapter 5**, “Making Your Documents Display Information Effectively,” teaches you how to present information clearly by using bulleted, numbered, and multilevel lists; how to create tables to lay out information precisely; and how to apply co-ordinated formatting easily by using Word’s themes and their components.

- **Chapter 6**, “Completing a Document,” first walks you through the process of adding a cover page and a table of contents to a document. You then learn how to customize a document’s page layout and margins, how to finalize and secure a document, and how to print either a whole document or only those parts of it you need.
- **Chapter 7**, “Editing Pictures Within Word,” shows you the easy way of making your pictures look good in your documents—by using Word’s features for editing pictures. You’ll gain the skills of inserting pictures, resizing them, and cropping them as needed; you’ll also learn to correct the color balance in a picture or even remove its background.
- **Chapter 8**, “Using Media with Word,” explains how to ginger up your documents by adding graphical objects to them. You can use Word’s extensive collection of clip art, insert your own pictures, or create exactly the shapes and SmartArt illustrations you need. If your documents require them, you can also insert computer screenshots, audio files, or video files.
- **Chapter 9**, “Working with Others,” teaches you to use Word’s powerful features for working with other people on documents. You’ll learn to mark revisions with the Track Changes feature, add comments to a document, and merge either marked or unmarked changes from two versions of a document. You’ll also find out how to restrict edit rights on a document and how to take linked notes using OneNote.
- **Chapter 10**, “Taking Your Use of Word to the Next Level,” shows you how to customize Word so that you can work faster and more easily in it. You’ll use the Word Options dialog window to set essential options the way you prefer; customize the Ribbon, the Quick Access Toolbar, and the status bar; and even record time-saving macros to automate repetitive tasks. You’ll also learn to save time by editing a document simultaneously with your colleagues and by creating documents with the Mail Merge feature.

Conventions Used in This Book

This book uses several conventions to make its meaning clear without wasting words:

- **Ribbon commands.** The > shows the sequence for choosing an item from the Ribbon. For example, “choose Insert > Illustrations > Clip Art” means that you click the Insert tab of the Ribbon (displaying the tab’s contents), go to the Illustrations group, and then click the Clip Art button.
- **Special paragraphs.** Special paragraphs present information that you may want to pay extra attention to. Note paragraphs contain information you may want to know; Tip paragraphs present techniques you may benefit from using; and Caution paragraphs warn you of potential problems.
- **Check boxes.** Word many check boxes—the square boxes that can either have a check mark in them (indicate that the option is turned on) or not (indicating that the option is turned off). This book tells you to “select” a check box when you need to put a check mark in the check box, and to “clear” a check box when you need to remove the check mark from it. If the check box is already selected or cleared, you don’t need to change it.
- **Keyboard shortcuts.** In Word, you can often save time and effort by using a keyboard shortcut rather than a Ribbon command. This book uses + signs to represent keyboard shortcuts. For example, “press Ctrl+S” means that you hold down the Ctrl key, press the S key, and then release the Ctrl key. “Press Ctrl+Alt+T” means that you hold down the Ctrl key and the Alt key, press the T key, and then release the Ctrl key and the Alt key.

Visit the *Beginning Microsoft Office 2010* Blog!

Word is a powerful program with many capabilities, and a book this size can cover only some of them.

For further information on Word 2010 and the other Office 2010 programs, please visit the *Beginning Microsoft Office 2010 Blog* at <http://www.ghdbooks.com>. Here you'll find tips, resources, and a form for asking questions you'd like to see covered on the site.



The Word 2010 Primer

It's time to open Word 2010 and gain some understanding of how the good people at Microsoft built it. Believe it or not, they didn't build in to torture you as you try to write you term paper, thesis, management report, or novel. Microsoft invests millions of dollars researching and speaking with people to make Word a better product. These investments have produced some startling innovations in the last two releases of Microsoft Word.

Microsoft dramatically revamped the Word's user interface in Word 2007 by adding the Office Fluent User Interface (a.k.a. the ribbon) to replace the outdated Office toolbars. Microsoft made a big bet that the Ribbon would make life incredibly easier for users to create documents using Word (and other Microsoft Office applications that utilize the ribbon). My experience as a consultant as well the experience of many of my peers and clients prove that the ribbon is a success.

In Word 2010, Microsoft has released another dramatic user interface innovation known as the Backstage. This user interface (UI) element is now the location of all activities that are not part of actual document authoring or creation. Tasks like opening, saving, closing, sharing, and printing documents are now backstage and not found on the Ribbon.

Dramatic changes like the Ribbon and Backstage require some adjustment on your part, particularly if you have lots of experience with previous version of Word. If you are new to Word, you are starting with a clean slate and will not have to learn new methods of accomplishing tasks.

The goal of this chapter is to give you a solid overview of the Word's basic mechanics. We start by covering the basics of working with documents and end with a discussion of the UI elements within Word.

At the end of this chapter, you will know the basics of navigating Word 2010, including the following:

- Navigate the Ribbon and know the purpose of its different tabs
- Use the Backstage view
- Open, close, and save documents

Before we take a look at the UI elements, I believe it is best to start by performing a few basic tasks in Word to get your feet wet. These tasks will give you a bit of a primer to working with Word and will possibly generate some questions about Word's user interface that I will explain in the latter half of the chapter.

Learning the Word 2010 User Interface

Learning any new application can be a frustrating experience, especially if time is tight and you need to be productive now. The learning process isn't unlike learning a new sport, for example swimming, which I recently decided to learn how to do for exercise. With sports, understanding technique and investing time to master it can make all the difference. To be a good swimmer, I had to spend some time going slow while focusing on my stroke and breathing. Doing so eventually meant I could go faster, much faster than if I hadn't focused on technique.

The same principle applies to learning software. The technique in this case is learning how the software works and how you should interact with it. You need to invest some time in understanding how the product team designed the program, and you need to learn what the manufacturer has to say about the best practices for using the software. To do otherwise can result in a serious amount of frustration and leave you flailing in a pool of expletives.

The first step in learning proper Word technique is understanding Word's user interface so that you know where to go to execute the actions you want. The purpose of this section is for you to become familiar with Word's main user interface elements like the Ribbon and the Backstage view. As a bonus, you will learn how to perform some basic customizations so that you can have easier access to the commands you use most.

Understanding Word's Fluent User Interface

Microsoft introduced the Fluent User Interface (Fluent UI) in the Office 2007 suite of applications, of which Word is a part. The goal of the Fluent UI was to simplify Word's complex menu and toolbar structure and build a system that presented, or made available, the relevant Word commands when you need them.

The result is a major improvement over previous versions. That isn't to say that everyone loves the Ribbon, because not everyone does. People who have been Word users since the '80s especially don't like it. But since this book is for beginners, you most likely aren't carrying any baggage and just need to understand how the different command elements are laid out within the user interface.

Figure 1–1 illustrates some the major components of the Fluent UI.

The Ribbon (item 1 in Figure 1–1) is the component of the Fluent UI that receives most of the press, good and bad. But it is only one part of the entire UI system. The system includes other elements like task panes, galleries, the File button, and more. In the following sections, I provide you with a description of each element to satisfy your curiosity for now, and you'll learn more as we move through this chapter's exercises:

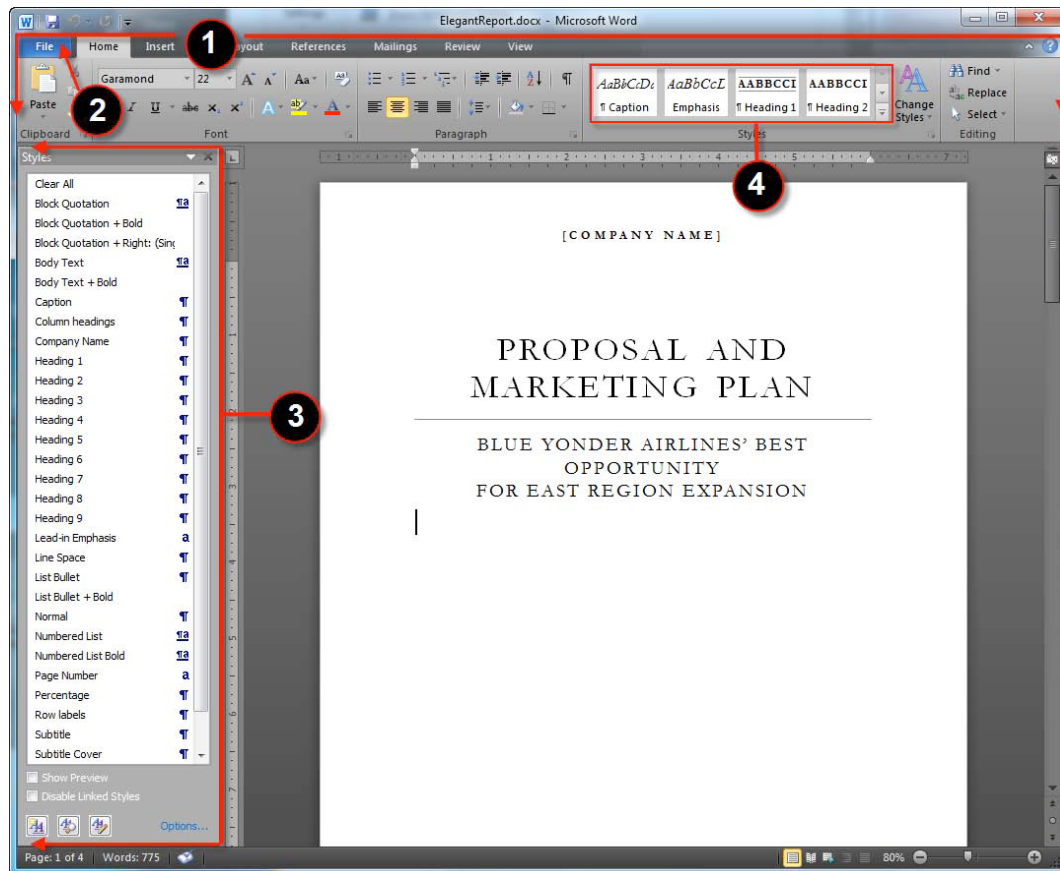


Figure 1-1. Word displaying some elements of the Fluent User Interface

The Ribbon

The Ribbon is the user interface element that replaced the traditional Word menus and toolbars. It is a collection of tabs organized by task type. The Home tab contains the most common types of commands for activities like the following:

- Cutting, copying, and pasting
- Formatting text (e.g., changing fonts, applying bold formatting, and changing text colors)
- Changing text alignment
- Working with styles

Other tabs in the Ribbon are more specialized just as their name implies. For example, the Insert tab contains commands for inserting objects like cover pages and images into your document. The Page Layout tab is where the options for fine-tuning how each page in your document will display and print. The References tab has the commands for—you guessed it—annotating your document. We'll work more with each tab in subsequent chapters.

The File Button and Backstage View

The name for the File button user interface element is confusing and is the result of its implementation in Word 2007. The File button has been updated for Word 2010 to be a tab within the Ribbon. In Word 2007, it was a circular button displaying the Office logo and was slightly elevated above the Ribbon. In Word 2010, the File button is the blue tab labeled File. It might make more sense to simply call it the File tab but that isn't the case; according to Microsoft, its proper name is the File button. To keep things simple and because it looks like a tab, I will refer to it as the File tab. Now that you know that somewhat needless bit of trivia, let me tell you what it does.

The File tab displays the Backstage view (see Figure 1-2), which is itself a new feature to Word 2010. The Backstage view is intended to provide a central location for all commands that work *with* the document instead of *on* the document.

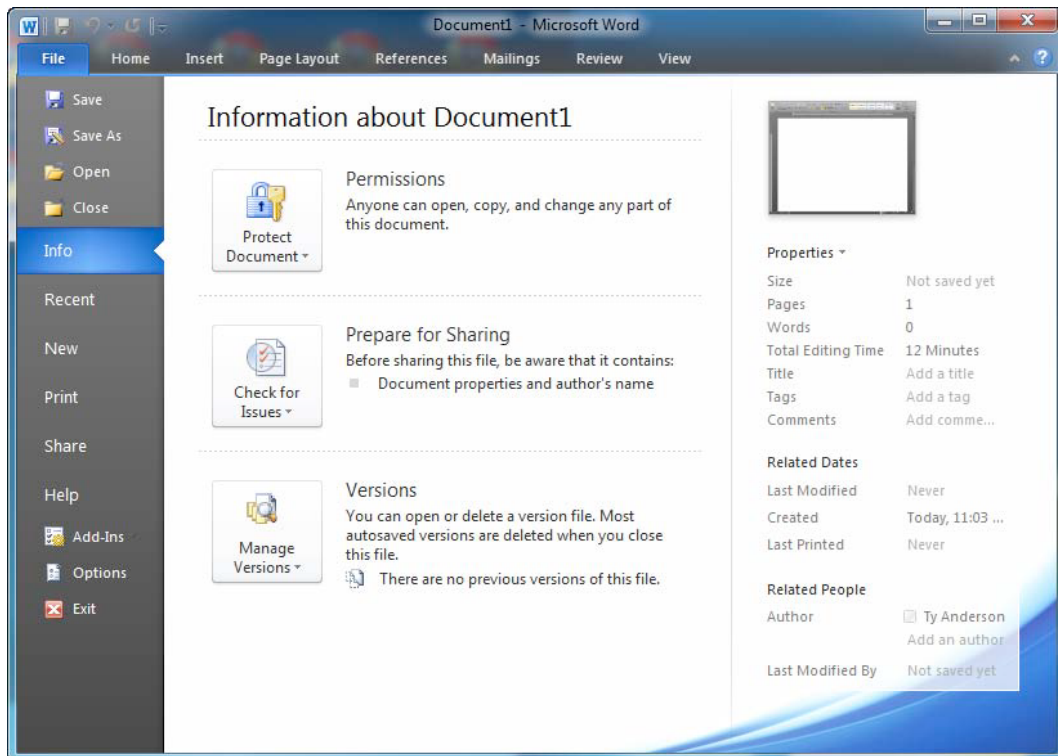


Figure 1-2. The File button activated to display the Backstage view

For example, activities like printing, sharing, opening, saving, and editing Word's option settings are not part of the actual writing of a document and thus are found in the Backstage view. In contrast, activities like formatting, editing the page layout, and inserting images are part of document creation and are found on the ribbon.

Task Panes

Task panes are vertical windows that dock on either side of the Word window. Task panes exist to help you complete a specific task by providing quick access to relevant commands within the pane and are only visible when requested. They don't automatically appear when you first open Word. An example is the Styles task pane that displays all the styles available for formatting the current document. Other panes available in Word 2010 include the Navigation pane, the Research pane, and the Reviewing pane.

Galleries

Galleries provide a set of results for you to choose from when working with your document. Figure 1–1 shows the Styles gallery residing on the Ribbon's Home tab. Each gallery control displays a result that you can choose to apply to text in your document.

These are the obvious components of the Fluent UI, but there are many more, including the Quick Access Toolbar, the Mini toolbar, and contextual tabs. I leave them out here only because I think they are easier to understand by completing a few exercises.

Learning to Use and Navigate the Ribbon

The Word 2010 ribbon contains eight tabs by default: File, Home, Insert, Page Layout, References, Mailings, Review, and View (see Figure 1–3). Each tab contains related commands that correspond to the name of the tab where they reside. Microsoft isn't trying to confuse anyone with the Ribbon; the idea is to make it simple for you to find the command you want when you want it.

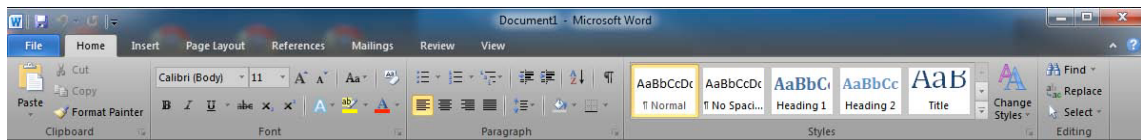


Figure 1–3. The Word 2010 Ribbon displaying the Home tab

For this first exercise, I'll ask you to open Word, and click around the different tabs just to become familiar with what's there. In some places, I'll suggest that you click one of the available commands to see the different types of controls on the Ribbon and how they work. The focus in this section is less on what these commands do to the current document than on learning to work with the Ribbon.

Now then, go ahead and open Word 2010 if you haven't opened it already, and let's get started with the first exercise.

1. Click the Home tab to activate it as the current tab.
2. Scan each of the groups available on the tab. You should see groups labeled Clipboard, Font, Paragraph, Styles, and Editing. Commands are not only located on Ribbon with related commands but they are also further grouped within each tab. This grouping really helps you find a desired command and understand what a set of commands does. Want to copy some text to the clipboard? It's a good bet you'll find what you are looking for in the Clipboard group.
3. Still in the Home tab, find the Styles groups, and click the More button—the down-pointing arrow located just to the right of the available styles (see Figure 1–4). This control is a good example of a gallery control. In this case, the control lists styles available for formatting your document's text.

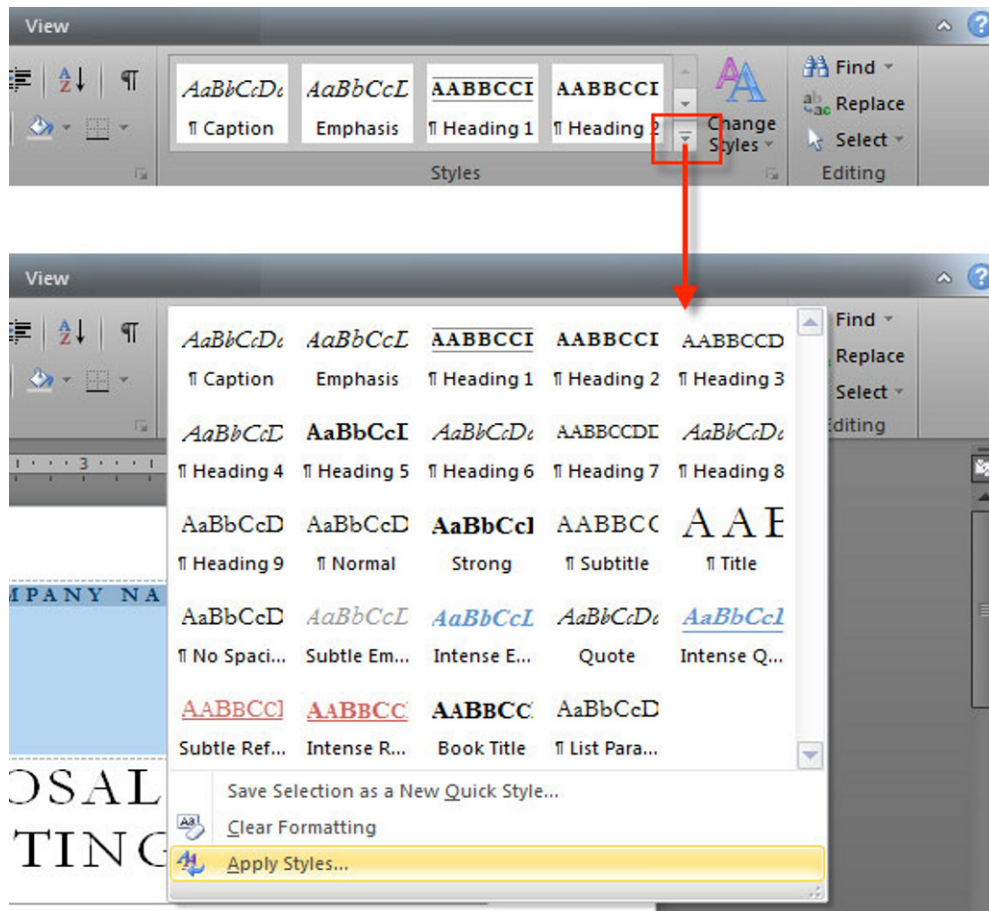


Figure 1–4. The Styles gallery available in the Ribbon's Home tab

4. Each control in the gallery provides a preview of how text will display when given that style. If you have text in your document, Word will provide you a feature called Live Preview to show you how the style looks when applied to your text. As you hover over different styles, the text changes too. Only when you click a style does Word actually apply it to the text in your document. Without clicking any of the styles, click the arrow again to hide the gallery.
5. Look in the Font group, and notice the several controls that display a downward-facing arrow next to their pictures (see Figure 1–5). When a control has an arrow like this, it typically offers additional options that you may choose. For example, in the Font control, clicking the arrow displays a full listing of fonts available on your system.

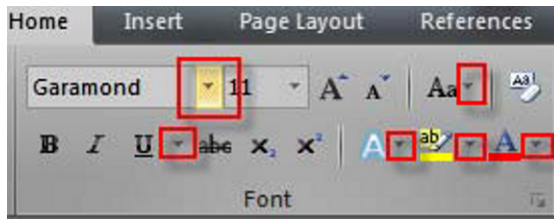


Figure 1–5. The Font group contains several control arrows that offer different options

6. Take a moment to click each of the arrows in the Font group to see what they offer. When you're finished, look for other controls with related downward-facing arrows. Click them to see what they allow you to do.

Tip The Ribbon groups are not all-inclusive, and some commands are indeed hidden. Something that isn't obvious is that several groups within the various tabs have a hidden Options dialog window. These highly detailed dialog windows provide all the options related to that group in a single location. Keep in mind that the Ribbon's purpose is to place the most common commands at your fingertips. An arrow in the bottom right-hand corner of a group signifies the existence of an Options dialog window for that group. Click the arrow to display the Options window and discover even more commands.

The Ribbon actually contains more than eight tabs. These additional tabs are known as contextual tabs and they become available only in certain circumstances.

Using Contextual Tabs

Contextual tabs are just like Word's eight main ribbon tabs except they display only when you perform certain tasks, like working with images or tables. When you edit an object type that has an associated contextual tab, the tab becomes available and provides options that only apply to that object type. A good example of this is the Picture Tools Format tab. Anytime you have an image as the active object in

your document, this tab becomes visible (see Figure 1–6) and provides tools specifically for formatting the selected image.

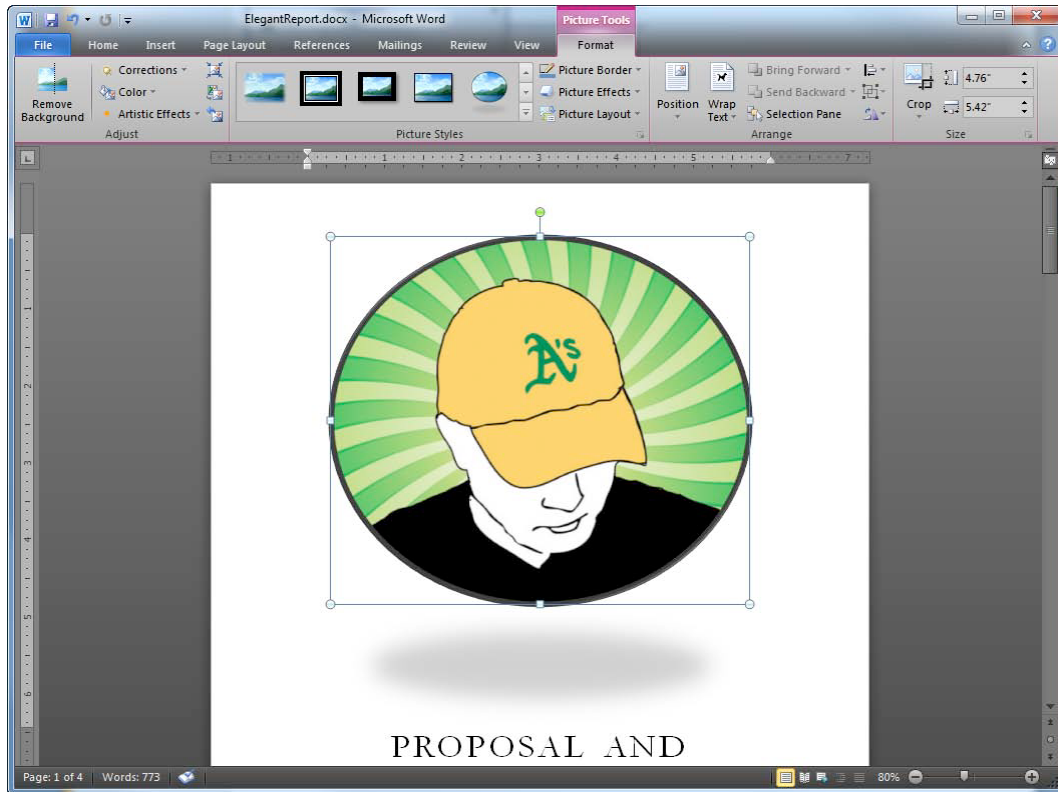


Figure 1–6. Word displaying the Picture Tools Format contextual tab

■ **Tip** Microsoft isn't afraid to try new ways to help people learn its products, like building a game to help you become familiar with the ribbon. For Office 2010, Microsoft released *Office Ribbon Hero*, a game that will help you increase your skills quickly by playing a game that is both cheesy and fun. You can download the game from the Microsoft Office Labs web site at <http://www.officelabs.com/Lists/Posts/Post.aspx?ID=88>.

In the following steps, I will show two different contextual tabs and point out some of the commands available within them:

1. With Word open, click the Insert tab available on the Ribbon.
2. Click the Picture button to display the Insert Picture Dialog window. This window allows you to locate an image on your hard drive, select it, and insert that image into the current document by clicking the Insert button. Go ahead and locate a picture, and insert it into your document.
3. After Word inserts your selected image, Word selects the images and keeps it as the active object within the document. Since the image is the active object, the Picture Tools Format tab is now visible.
4. In the Picture Tools Format tab, find the Adjust group, and click the Artistic Effects button. You should see a list of effects you can apply to the image. Hover over each result with your mouse to view a live preview of the effect on your image without actually applying it. Apply one by clicking it.
5. Locate the Picture Styles group, and click the down-facing arrow attached the Picture Styles gallery. Hover over each style with your mouse, and view how each applies to your image. Apply your desired style by clicking it.

There are more features for editing images but this is enough for now. Next, let's look at another contextual tab that allows you to format tables.

1. Delete the image in your document by clicking it with your mouse and pressing the Delete key on your keyboard.
2. Click the Insert tab available on the Ribbon.
3. Find the Tables group in the Insert tab, and click the Table button to display the Insert Tables gallery (see Figure 1-7).
4. The top section of the Tables gallery is a series of squares, ten columns wide and eight rows deep. The idea behind this section is for you to quickly define a table with your mouse and then insert the new table into your document with a single mouse click. Give this a try by hovering your mouse to define a table four columns wide and six rows deep. Once you are satisfied with the dimensions, left-click to insert the new table.
5. After Word inserts the new table, you have two new table tools contextual tabs named Design and Layout.
6. Click the Table Tools Design tab, and locate the Table Styles groups. Click the down-facing arrow of this group to display the Table Styles gallery. Choose a style that suits your fancy, and click it to apply the style to your table.
7. Click the Table Tools layout tab, and locate the Rows & Columns group.
8. Click the Insert Above button to insert a new row above the currently active row in your table (the row that contains the cursor is the active row).
9. Click the Insert Right button to insert a new column to the right of the currently active column.

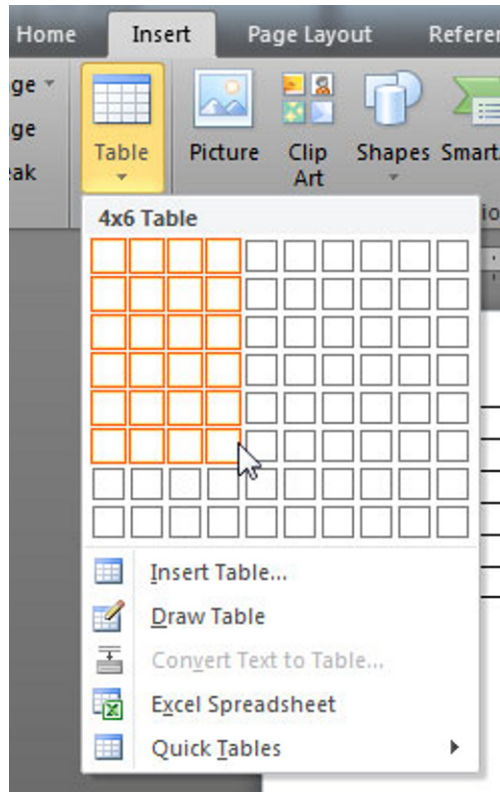


Figure 1–7. Inserting a table in Word using the Tables gallery

Each of these contextual tabs contains many more features that I will leave to you to play around with to discover what they do. The idea here is to expose you to the Ribbon and provide an overview of how it is organized and how you work with its controls to affect your document. As you move through the remaining chapters, you will learn more about the available ribbon commands of each tab.

Using the Quick Access Toolbar

The Quick Access Toolbar (see Figure 1–8) resides in the upper left-hand corner of the Word window. It exists to provide you with quick access to the commands you use most and is always on display, no matter which Ribbon tab is active. This makes the Quick Access Toolbar the ideal location to place the commands you love and use most often. It is intended for you to customize it by adding your favorite commands available within the different Ribbon tabs.

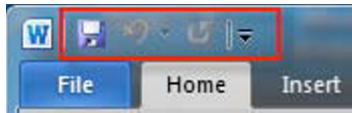


Figure 1-8. The Quick Access Toolbar as it looks without any customizations

Adding a Button to the Quick Access Toolbar

You can add a command to the Quick Access Toolbar (QAT) with just a few clicks. In fact, it is so simple you will be tempted to add a plethora of commands right off the bat just in case you can't find them later. Go for it, because I will show you how to remove commands as well. Here is how to add a command:

1. Navigate to the Home tab, and find the Copy button. If you need a hint, the Copy button resides in the Clipboard groups.
2. Right-click the Copy button with your mouse to display a context menu that provides additional commands related to the button.
3. Click "Add to Quick Access Toolbar" as shown in Figure 1-9.

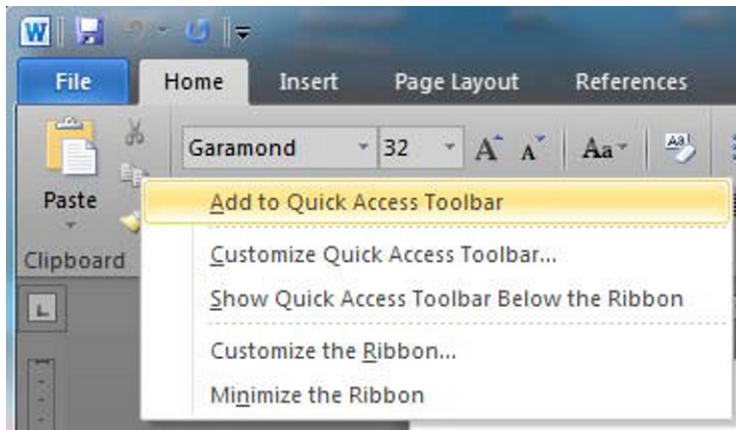


Figure 1-9. Selecting Add to the Quick Access Toolbar

4. Review the QAT to see the newly added Copy button.
5. Add some text to your document, and select it. Then, click the Copy button residing on the QAT to test that it works.
6. To verify the new Copy button does indeed work, now click the Paste button residing on the Home ribbon tab. You should see the copied text pasted into your document.

The process of adding QAT buttons is quick and easy and allows you to place a command you are using frequently, either temporarily or everyday, in a convenient location. Now, what if you placed a button on the QAT but now want to remove it? That's next.

Removing a Button from the Quick Access Toolbar

Removing a button is just as easy as adding one; it follows a similar sequence. Let's remove the Copy button added in the previous exercise by completing these steps:

1. Right-click the Copy button in the QAT to display its context menu.
2. Click "Remove from Quick Access Toolbar" to remove the button.
3. Review the QAT, and verify the removal of the Copy button.

The ease with which you can customize the QAT means that you can add and remove frequently used buttons as you wish. If buttons drop out of favor and you find you don't use them enough to make them QAT-worthy, you can quickly remove them.

The Mini Toolbar

The Home Ribbon tab contains the majority of styling and formatting commands. It is well organized and makes it easy to find these types of commands for use in your document. But what do you do when you have a different tab, for example the Insert tab, as the active tab but want access to formatting and styling commands? You could customize the QAT by adding slew of additional buttons but that will quickly congest the QAT.

Fortunately, there is an additional toolbar called the Mini toolbar (see Figure 1-10). This toolbar is a type of context menu that becomes visible when you select text in your document and move the cursor away from the selection.

Causing the Mini toolbar to display can be tricky, but it's all in the wrist, as you can see by performing the following actions:

1. Open Word (if it isn't open already), and add some text to a document.
2. Use your mouse to highlight the text, making it the selected text.
3. Slowly move your mouse above the selected text to display the Mini toolbar.
4. When the Mini toolbar displays, click the Bold and the Italics buttons to edit the selected text's format.
5. Move your mouse away from the Mini toolbar to hide it again.

The Mini toolbar is a nice time-saver, because it allows you to format your text without moving your mouse to the top of the Word application window. It does require a bit of practice however, as it sometimes likes to pop up when you are not expecting it.