



Word 2013: Advanced Design

## Who Done It?

### Advanced Word Objectives

In this lesson you will how to:

1. Merge cells in a table.
2. Show Developer Toolbar.
3. Add a Text Control Form Field, a Date Picker Control, and a Combo Box Control.
4. Protect a document.
5. Apply, Create and Modify Themes.
6. Insert and edit a Cover Page.
7. Link a form to a database.

The screenshot shows the Microsoft Word 2013 interface with the 'Bug Report' form. The form is titled 'Bug Report' in green. It contains several form fields: 'Name: Click here to enter text.', 'Location:', 'Computer Name:', 'Date: Click here to enter a date.', 'Operating System: Choose an item.', 'Applications open at the time of the incident:', 'Severity of the Problem: Choose an item.', and 'Pending Issues:'. A date picker is open for the 'Date' field, showing the month of April 2013. The ribbon at the top shows the 'DEVELOPER' tab, which is used for creating and managing form fields.



COMPUTERS ARE US  
PREPARED FOR OUR CLIENT: «FIRST\_NAME» «LAST\_NAME»  
«USER\_NAME» «PASSWORD»



## Lesson 5: Who Done It?

### 1. Readings

Read Lesson 5 in the Advanced Word Guide, page 179-220.

### Project

Create an interactive form using the Developers Tools. This form will include a Cover Page, Smart Art and a Screen Shot.

### Downloads

Files used in the lesson:

[Bug Report 2013.docx](#)

[Bug Report 2013 with Mail Merge.docx](#)

[Charlottes Employees 2013.mdb](#)

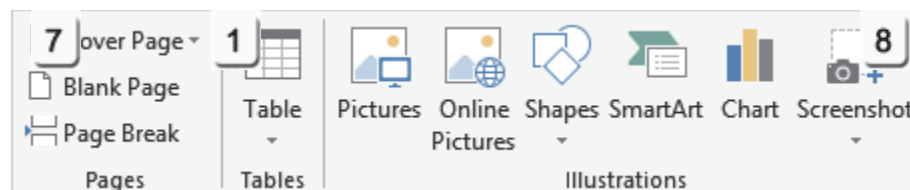
### 2. Practice

Complete the Practice Activity, page 221.

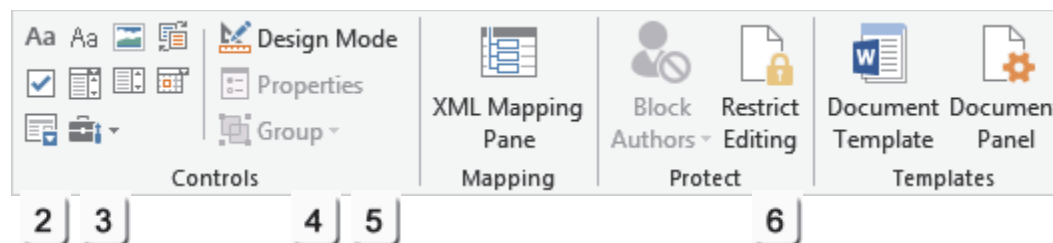
### 3. Assessment

Review the Test questions, page 222.

#### Insert



#### Developer



#### Menu Maps

This lesson shows options on the **Insert** and **Developer** Ribbons.

1. [Insert-> Table](#), page 182
2. [Developer-> Controls-> Rich Text Control](#), page 186
3. [Developer-> Controls-> Date Picker](#), page 187
4. [Developer-> Controls-> Combo Box](#), page 188
5. [Developer-> Controls-> Properties](#), page 189
6. [Developer-> Protect-> Restrict Editing](#), page 190
7. [Insert->Cover Page](#), page 201
8. [Insert-> Illustrations-> Screen Shot](#), page 208

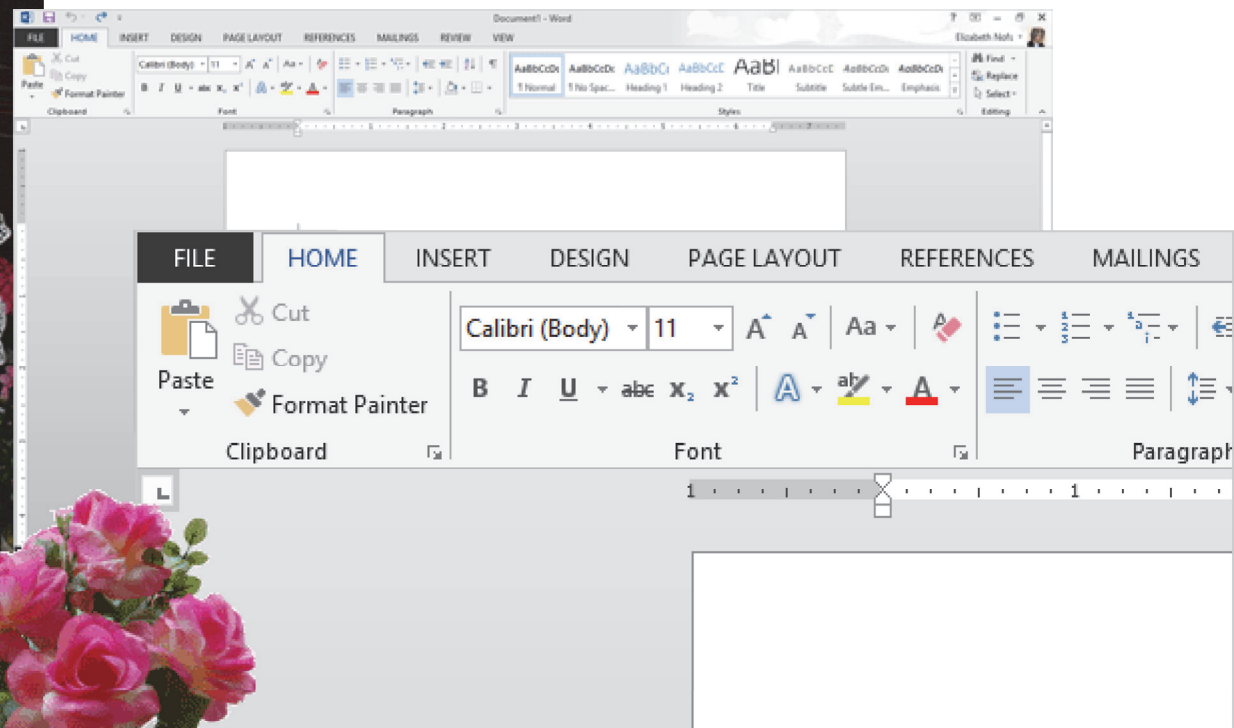




## Creating Forms in Word 2013

Every office—big or small—needs to generate forms. We use a form to gather data and to insure that the information is complete. Today we're going to use Microsoft Word to create a form that we can answer on-line. Our form is going to be a status report for when a computer or application fails.

So, please Start Microsoft Word and open a new, blank document.





## Use a Table for Form Design

You can use the columns and rows in a Table to make a professional form and simplify the form design. The Table controls the placement of the Form Fields like a shadow box.

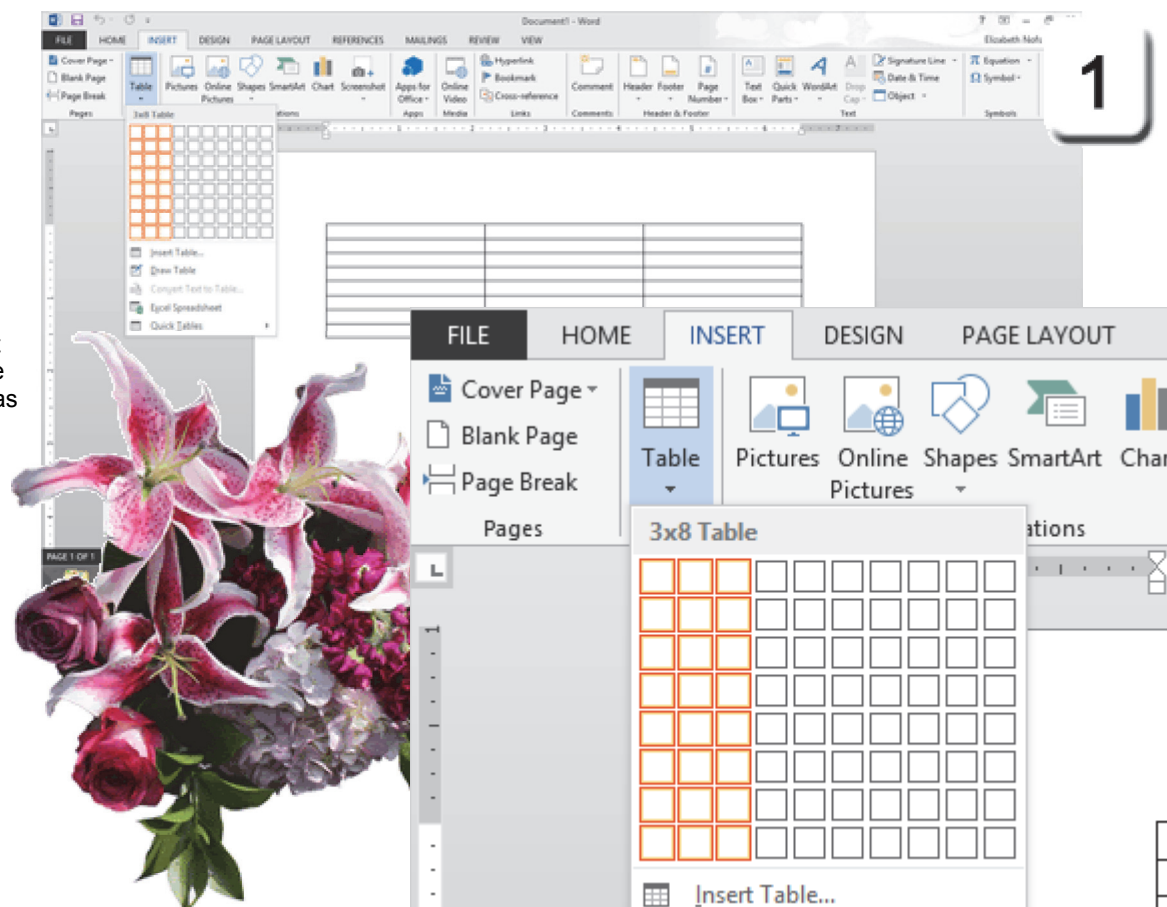
### 1. Try This: Insert a Table

Go to **Insert -> Tables -> Table**.  
Now, highlight a 3x8 table.

**What Do You See?** You should see a Table that is three Columns wide and eight Rows deep. The upper left corner square is called Cell A1, same as the first Cell in an Excel spreadsheet.

Keep going...

Insert -> Tables -> Table



Exam 77-418 Microsoft Word 2013  
3.0 Create Tables and Lists  
3.1 Create A Table





## Enter the Labels

### 2. Try This: Type the Labels

Click in the first Cell, A1, and type: Name:

Tab to the third Cell, C1, and type: Location:

When you tab again your cursor will go to the Cell A2 in the second row.

**Row 2:** Go to Row 2.

Click in Cell A2 and type: Computer Name

Tab to the third Cell, C2 and type: Date:

**Row 3:** Go to Row 3

Click in Cell A3 and type: Operating System:

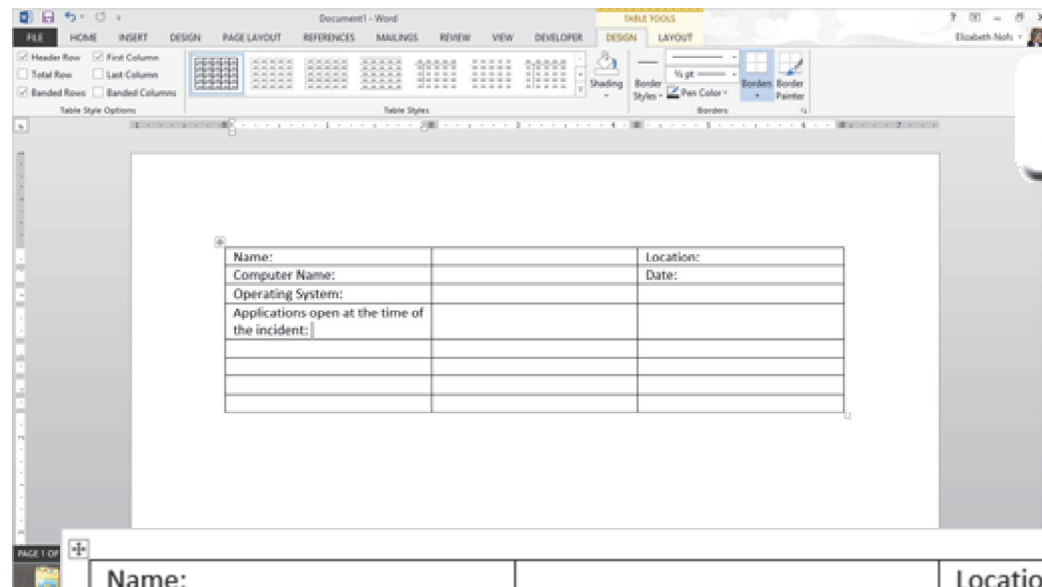
**Row 4:** Go to Row 4

Click in Cell A4 and type: Applications Open at the Time of the Incident:

Keep going, please...



### Insert ->Table



Name:		Location:
Computer Name:		Date:
Operating System:		
Applications open at the time of the incident:		



## Merge Cells

### 3. Try This: Merge the Table Cells

You can **Merge**, or combine, cells together to create different sizes.

**Select** Cell A1 and Cell B1, the one with the label "Name" and the next one.

Go to the **Table Tools**.

Go to **Layout-> Merge**.

Click on **Merge Cells**.

**Select** Cells A2 and B2.

Go to **Table Tools->Layout -> Merge**.

Click on **Merge Cells**.

**Select** Cells A4, B4 and C4.

Go to **Table Tools->Layout -> Merge**.

Click on **Merge Cells**.

Type in Cell A6: Severity of the Problem:

Type in Cell A7: Presenting Issue:

### Do This, Too: Save Your Work

Go to **File->Save**.

Enter the Name: Bug Report 2013 EAN,  
where EAN is your initials.

### Table Tools -> Layout -> Merge-> Merge Cells

The screenshot shows the Microsoft Word 2013 interface with the Table Tools Layout tab selected. The 'Merge Cells' button is highlighted in the ribbon. In the background, a table is visible with the following structure:

Name:	Location:
Computer Name:	Date:
Operating System:	
Applications open at the time of the incident:	
Severity of the Problem:	
Presenting Issue:	

A callout box shows the 'Merge Cells' button being clicked, with a '3' in a box next to it.

Exam 77-418 Microsoft Word 2013  
3.0 Create Tables and Lists  
3.2 Modify a Table: Merge Cells



## Show the Developer Toolbar

Does your Form work? Try to enter your name. Did you notice that it was not easy to get from the Name field to the Location field?

Forms need to be more “user friendly.” People should be able to start in the Name box and TAB to go to the next form control. Yes, there is a way to do it. You need to create a **Form**.

Start by showing the **Developer's Toolbar**.

### 4. Try This: Customize the Ribbons

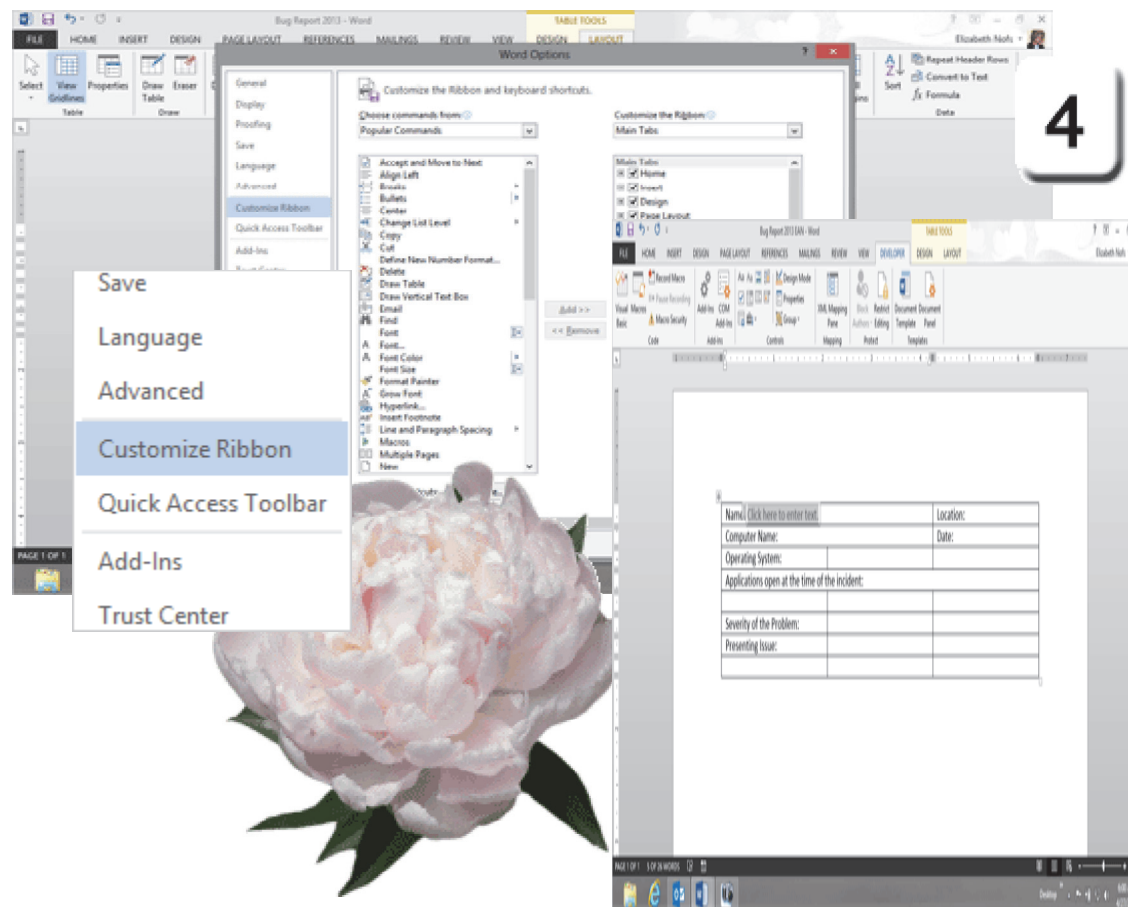
Go to **File->Options**.  
Go to **Customize Ribbon**.

**What Do You See?** The first Column has the Ribbons that are currently available. The second Column has a few more that you can display.

### Do This: Add the Developer Ribbon

Check **Developer**.  
Click **OK**. Keep going...

## File -> Options -> Customize Ribbons



Exam 77-418 Microsoft Word 2013  
1.0 Create and Manage Documents  
1.4 Customize Options and Views For Documents: Customize the Ribbon



## Rich Text Control

**What Do You See?** There should be a new **Developer** tab. There are two **Text Controls**. One is for **Plain text**, the other is for **Rich text**-big, bold, blue. The Rich text button (Aa) looks bold.

### 5. Try This: Create a Text Control

Place your cursor to the right of the "Name" label.

Go to the **Developer** tab.  
Find the **Controls** group.  
Click the **Rich Text Form Field (Aa)**.

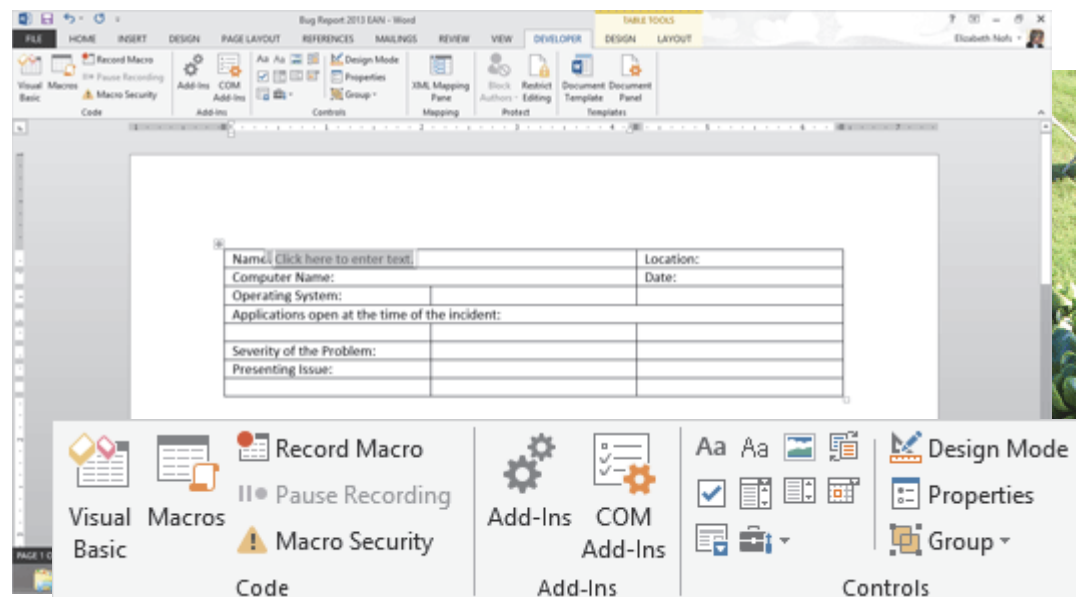
**What Do You See?** You should see a new **Control** that instructs the user: **Click here to enter text...**

### How Do You Remove a Form Field?

Say you added too many Text Fields.  
Click on the Field to select it.  
Press DELETE on your keyboard to remove the Field from this Form.

Keep going...

### Developer -> Controls -> Rich Text Control



Name:	Click here to enter text.
Computer Name:	
Operating System:	
Applications open at the time of the incident:	

Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage Forms, Fields, and Mail Merge Operations: Add Field Controls



## Date Picker Control

### 6. Try This, Too: Add the Date Picker

Click to the right of the "Date" label.

Go to **Developer->Controls**.

Select the **Date Picker** Control.

(The Date Picker Control is in the bottom row of the Controls group. It looks like a little calendar.)

**What Do You See?** The **Date Picker** lets you page through the months with the arrows on the top of the calendar.

**The Computer Mama Sez:** Tell me isn't that the coolest thing you've done in a while.



## Developer -> Controls -> Date Picker

The screenshot shows the Microsoft Word 2013 interface with the **Developer** tab selected. The **Controls** group is open, and the **Date Picker** control is being added to a form. The form contains fields for Name, Computer Name, Operating System, Applications open at the time of the incident, Severity of the Problem, and Presenting Issue. The Date Picker control is shown as a calendar for April 2013, with the date 27 selected. A callout box labeled '6' points to the Date Picker control.

April 2013						
Su	Mo	Tu	We	Th	Fr	Sa
	31	1	2	3	4	5
	7	8	9	10	11	12
	14	15	16	17	18	19
	21	22	23	24	25	26
	28	29	30	1	2	3
	5	6	7	8	9	10

Today



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage Forms, Fields, and Mail Merge Operations: Add Custom Field Controls





## Combo Box Control

Selecting answers from a list means the data will be consistent and it will take less time to fill out the form. There are only so many Operating Systems, so that would be a good place for a **Combo Box Control**.

### 7. Try This: Add a Combo Box Control

Place your cursor in Cell B3.

Go to **Developer->Controls**.

Select **Combo Box** from the Control group.

You should see a new Control that prompts you to **Choose an item**.

### Change the Combo Box Properties

If you try to use the Combo Box right now, there is nothing on the list to choose. You can add items by editing the Properties.

### Try This, Too: Edit the Properties

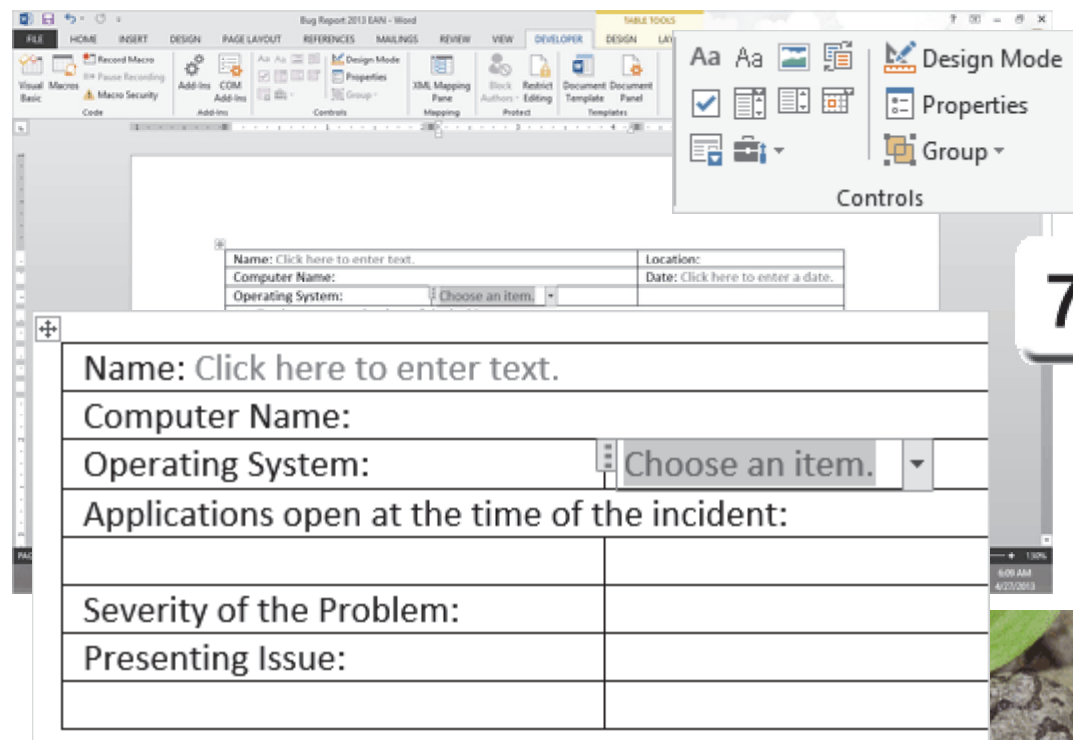
Select the Combo Box.

Go to **Developer->Controls**.

Select **Properties**.

Keep going...

## Developer -> Controls -> Combo Box



Exam 77-425 Microsoft Word 2013 Expert

3.0 Create Advanced References

3.3 Manage Forms, Fields, and Mail Merge Operations: Add Custom Field Controls



## Combo Properties

### 8. Try This: Edit the Combo Properties

Enter a **Title**: Operating System .  
Do NOT check Contents cannot be edited.  
Here are the steps to Add something to List:  
Click **Add**. Type a **Display Name** and **Value**.  
Add the following items to the list.

Display Name: Windows 8  
Value: Win8

Display Name: Windows 7  
Value: Win7

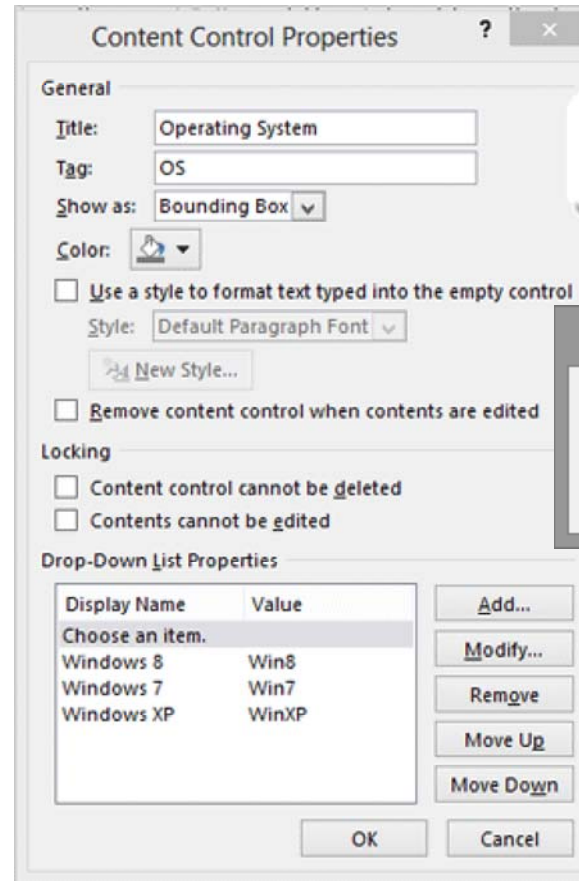
Display Name: Windows XP  
Value: WinXP

The **Display Name** is what you will see in the list when you click on the Combo Box. The Value is the information stored when you choose an item from the list.

You can arrange the items in the list by selecting it and using the Move Up or Move Down buttons.

Click **OK**. Keep going.

Developer -> Controls -> Properties



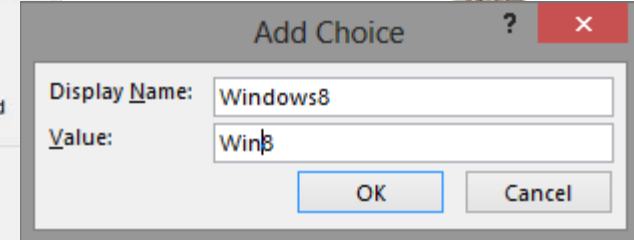
The 'Content Control Properties' dialog box is shown. The 'General' tab is active. The 'Title' is 'Operating System' and the 'Tag' is 'OS'. The 'Show as' is 'Bounding Box'. The 'Color' is set to a blue icon. The 'Use a style to format text typed into the empty control' checkbox is unchecked. The 'Style' is 'Default Paragraph Font'. The 'Remove content control when contents are edited' checkbox is unchecked. The 'Locking' section has two unchecked checkboxes: 'Content control cannot be deleted' and 'Contents cannot be edited'. The 'Drop-Down List Properties' section shows a table with 'Display Name' and 'Value' columns. The table contains the following items:

Display Name	Value
Choose an item.	
Windows 8	Win8
Windows 7	Win7
Windows XP	WinXP

Buttons for 'Add...', 'Modify...', 'Remove', 'Move Up', and 'Move Down' are to the right of the table. 'OK' and 'Cancel' buttons are at the bottom.



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The 'Add Choice' dialog box is shown. The 'Display Name' is 'Windows8' and the 'Value' is 'Win8'. 'OK' and 'Cancel' buttons are at the bottom.

**Memo to Self:** Previous versions of Microsoft Word had a button to **Add Help Text**. The **Help Text** was shown in the Status Bar at the bottom of the form.

By default, the **Display Name** In Word 2013 says: Choose an item. You can **Modify** the **Display Name** to give your users more information or directions if you wish.

Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage Forms, Fields, and Mail Merge Operations: Modify Field Control Properties



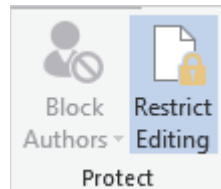
## Protect the Document

One more step. A Form will not work properly until you **Protect the Document**. Protecting a document places the Form in User mode and turns off the editing. Protecting a document also activates the Form Controls.

### 9. Try This: Protect the Document

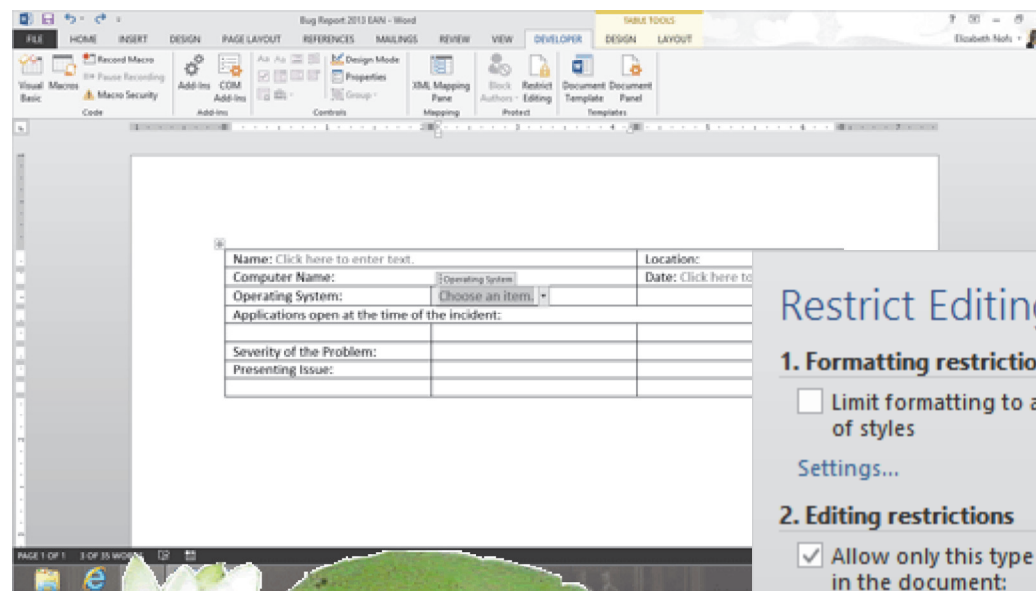
Go to **Developer -> Protect**.

Select: **Restrict Editing**.



**What Do You See?** You should have a new Task bar on the right side of your document. You can edit the restrictions for Formatting and Editing. Keeeep going...

### Developer -> Protect -> Restrict Editing



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Exam 77-425 Microsoft Word 2013 Expert  
1.0 Manage and Share Documents  
1.2 Prepare Documents for Review: Restrict Editing



## Test the Form

Forms have to be **Protected**, then they can work. When the document is locked, a user will be able to fill in the blanks. Users shouldn't edit the labels or change the Controls.

### Try This: Edit the Restrictions

Check **Allow only this type of editing in this document**.

Select: **Filling in Forms**. Click: **Yes, Start Enforcing Protection**.

**What Do You See?** You will be prompted for a Password when you click Yes. You can add a password if you wish. This is not real security, but it will stop most curious users from altering your form.

**Try it: Does it work?** Where are you allowed to edit the Form?

## Developer -> Protect Document

The screenshot shows the Microsoft Word 2013 interface with the 'Developer' tab selected. A form titled 'Bug Report 2013 EAM' is open, containing fields for 'Name', 'Computer Name', 'Operating System', 'Applications open at the time of the incident', 'Severity of the Problem', and 'Presenting Issue'. The 'Operating System' field is a dropdown menu with a list of operating systems: Windows 8, Windows 7, and Windows XP. The 'Start Enforcing Protection' dialog box is open, showing the 'Protection method' section. The 'Password' option is selected, and the 'User authentication' option is also visible. The dialog box prompts the user to enter a new password and reenter it to confirm. The 'OK' and 'Cancel' buttons are at the bottom right of the dialog box.

**Start Enforcing Protection**

Protection method

☒ Password

(The document is not encrypted. Malicious users can edit the file and remove the password.)

Enter new password (optional):

Reenter password to confirm:

☐ User authentication

(Authenticated owners can remove document protection. The document is encrypted and Restricted Access is enabled.)

OK Cancel

**Name:** Click here to enter text.

**Computer Name:**

**Operating System:** Choose an item.

**Applications open at the time of the incident:** Choose an item.

**Severity of the Problem:**

**Presenting Issue:**

Windows 8  
Windows 7  
Windows XP

Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage Forms, Fields, and Mail Merge Operations: Protect a Form



## Add More Combo Boxes

In order to continue editing, you need to unprotect the document. Go back to **Developer->Restrict Editing** and **Stop Protection** the document so that you can add some more Combo Box Controls.

### Try it: Make a Combo in Cell A5

Place your cursor in Cell A5

Go to **Developer->Controls->Combo Box Control**.

Go to the **Properties**

**Title:** Applications

**Combo Control Properties:**

Word

Excel

Outlook

PowerPoint

Access

**Copy** the Combo Box.

**Paste** it into Cells B5 and C5.

### And Try This: Make a Combo in Cell B6

**Title:** Severity

**Combo Control Properties:**

Can't Boot

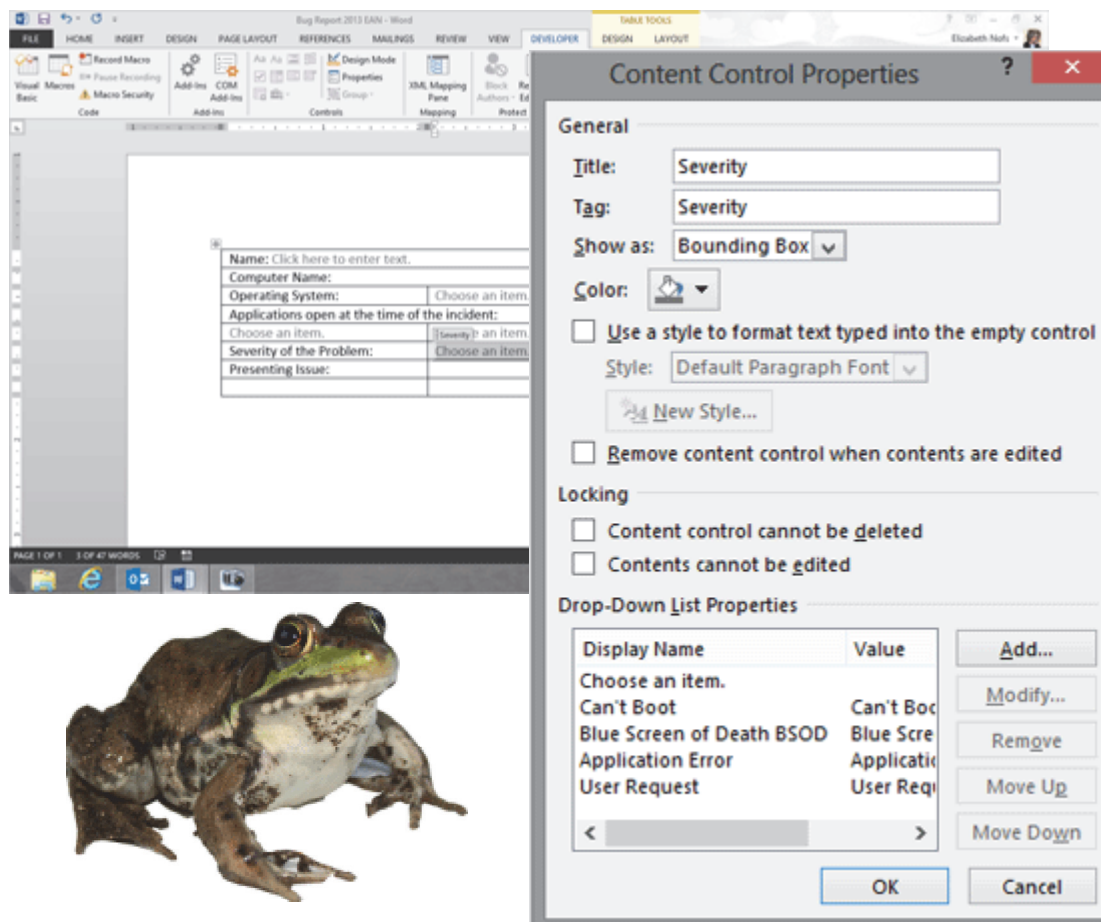
Blue Screen of Death (BSOD)

Application Error

User Request

Click **OK**.

## Developer -> Controls-> Combo Box Control



Exam 77-425 Microsoft Word 2013 Expert

3.0 Create Advanced References

3.3 Manage Forms, Fields, and Mail Merge Operations: Add Custom Field Controls





## Insert WordArt

Microsoft Office has an option for creating banners with 3Dimensional letters and vibrant color gradients.

**Before You Begin:** Select the table and drag it down one or two lines.

### 1. Try it: Convert Text to WordArt

Place your cursor above the Table.

Type: Bug Report.

Select the text: Bug Report.

Go to **Insert->Text->WordArt**.

Select a **Style**.

**What Do You See?** The text will be converted into WordArt. By default, the text is 36 pt. You can edit the text formatting if you wish with the Home Ribbon.

**Memo to Self:** Sometimes it is difficult to place anything above the Table. If the WordArt ends up **BEHIND** the table, go to **UNDO** and try this. Place your cursor in Cell A1 in the table. Hit the Enter key on your keyboard to create a blank line. Try to move the WordArt, now.

## Insert -> Text-> WordArt

The screenshot shows the Microsoft Word 2013 interface. The 'Insert' tab is active, and the 'WordArt' button is highlighted. A dropdown menu shows various WordArt styles. The main document area displays a table with the following content:

Name: Click here to enter text.		Location:
Computer Name:		Date: Click here to enter a date.
Operating System: Choose an item.		
Applications open at the time of the incident:		
Choose an item.	Choose an item.	Choose an item.
Severity of the Problem:		Choose an item.
Presenting Issue:		

The WordArt text 'Bug Report' is positioned above the table, rendered in a large, blue, 3D-style font.

Exam 77-418 Microsoft Word 2013  
2.0 Format Text, Paragraphs, and Sections  
2.2 Format Text and Paragraphs: Change Text to WordArt



## Position the WordArt

When you select the WordArt, you will see the new **Layout Options**. You can use these options to position the Word Art and edit the Text Wrapping if you wish.

### 2. Try This: Format the Text Wrapping

Move the WordArt above the Table.

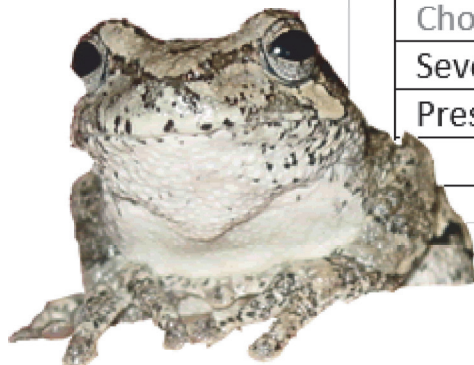
Go to **Layout Options->With Text Wrapping**. Select **Square**.

### Do This, Too: Anchor the WordArt

Select: **Fix position on page**.

This will lock, or anchor, the WordArt shape to a specific place in the document.

Keep going...



## Layout Options-> With Text Wrapping-> WordArt

The screenshot shows a Microsoft Word document with a WordArt titled "Bug Report" in blue, bold, sans-serif font. Below the WordArt is a table with the following rows:

Name: Click here to enter text.	
Computer Name:	
Operating System:	Choose an i
Applications open at the time of the incident:	
Choose an item.	Choose an i
Severity of the Problem:	Choose an i
Presenting Issue:	

The "Layout Options" task pane is open on the right, showing the "With Text Wrapping" section. The "Square" wrapping option is selected. Below the wrapping options, the "Fix position on page" radio button is selected. A large number "2" is overlaid on the bottom right of the screenshot.

Exam 77-418 Microsoft Word 2013

5.0 Insert and Format Objects

5.2 Insert and Format Shapes and SmartArt: Wrap Text around Shapes



## Format for Printing

We have been designing a form that can be completed on the computer.

What should you change if this form will be printed and filled out by hand?

Your form has to have enough space for people to print the information. If you increase the size of the text, then there will be more space between the lines. 14 pt is the minimal size for folks to write in. You can also increase the **Line Spacing**.

**Before You Begin: Select the Table**  
Click on the Table.  
Go to **Table Tools->Layout ->Table**.  
Click on **Select->Select Table**.

**3. Try This: Format the Line Spacing**  
Go to **Home ->Paragraph**.  
Go to **Line Spacing**.  
Select: 2.5.

Keep going...

Home -> Paragraph ->Line Spacing

The screenshot shows the Microsoft Word 2013 interface. The 'Bug Report' form is the main content. The 'Paragraph' task pane is open on the right, and the 'Line Spacing' dropdown menu is open, showing '2.5' selected. The form includes fields for Name, Location, Computer Name, Date, and Operating System.

Name: Click here to enter text.	Location:
Computer Name:	Date: Click here to enter a date.

# Bug Report

Name: Click here to enter text.	
Computer Name:	
Operating System:	Choose an item.

3

Exam 77-418 Microsoft Word 2013  
3.0 Create Tables and Lists  
3.3 Create and Modify a List: Modify Line Spacing



## Finish the Form

Time to take off the training wheels, lock the Form, and hand it out. The Form was developed with a Table. Finish the Form by formatting the Borders and Shading.

**Table Styles** offer Quick Style formatting the Borders and Shading in this Form.

### 4. Try it: Format the Table

Click once on the Table to select it.

Go to the **Table Tools**.

Find the **Design** tab.

There are two sets of options you can choose to make your information easy to read: Use the **Table Style Options** to format the Header Row, Banded Rows, and First Column.

Keep going...

### What is the purpose of a Bug Report?

Where the Computer Mama works the saying goes: If it ain't written down, it didn't happen."

## Table Tools -> Design -> Table Style

**Bug Report**

Name: Click here to enter text.		Location:
Computer Name:		Date: Click here to enter a date.
Operating System:	Choose an item.	
Applications open at the time of the incident:		
Choose an item.	Choose an item.	Choose an item.
Severity of the Problem:	Choose an item.	
Presenting Issue:		

4



<input type="checkbox"/> Header Row	<input checked="" type="checkbox"/> First Column	
<input type="checkbox"/> Total Row	<input type="checkbox"/> Last Column	
<input checked="" type="checkbox"/> Banded Rows	<input type="checkbox"/> Banded Columns	
Table Style Options		
		Table Styles

Exam 77-418 Microsoft Word 2013  
3.0 Create Tables and Lists  
3.2 Create a Table: Apply Styles to a Table



## Apply Themes

The Quick Style table formatting in the Table Design Tools identified special aspects of this table: Header Row, First Column, etc. Microsoft Office 2013 has another set of tools on the **Design** Ribbon: **Themes**.

**Themes** are applied to the entire Word document, all of the pages. The Themes include **Color** palettes, **Font** libraries, and graphic **Effects** templates.

### 5. Try it: Apply Themes

Go to **Design->Document Formatting->Themes**.

Select **Themes: Built In**.

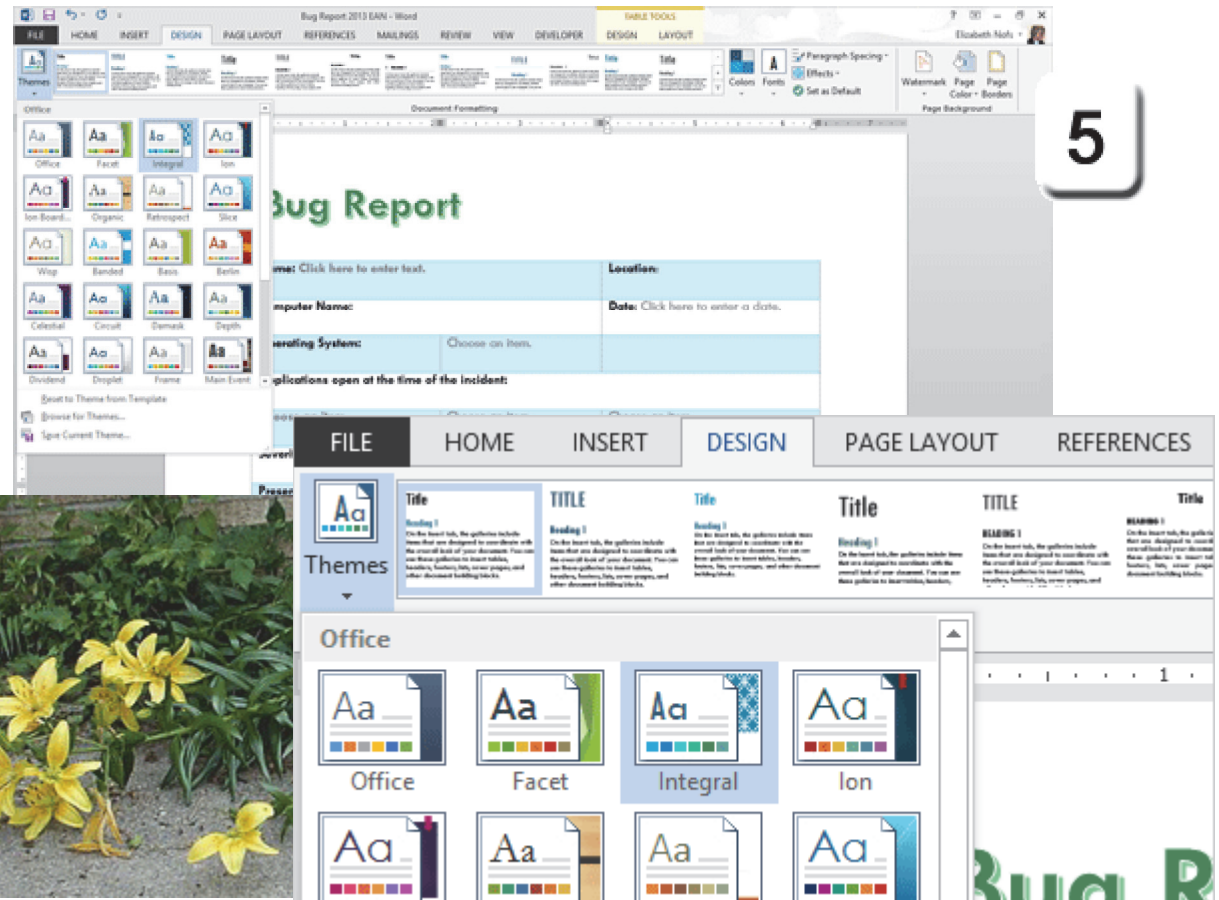
Choose a **Theme** from the library.

Keep going...

*Someone turned the gravity up...  
(keep going)*



## Design-> Document Formatting -> Themes



Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Create Custom Color themes





## Apply Theme Colors

There are a couple of dozen Built In color Themes. The color chips, from left to right, format the Font, Background, and Accents.

### 6. Try it: Apply Theme Colors

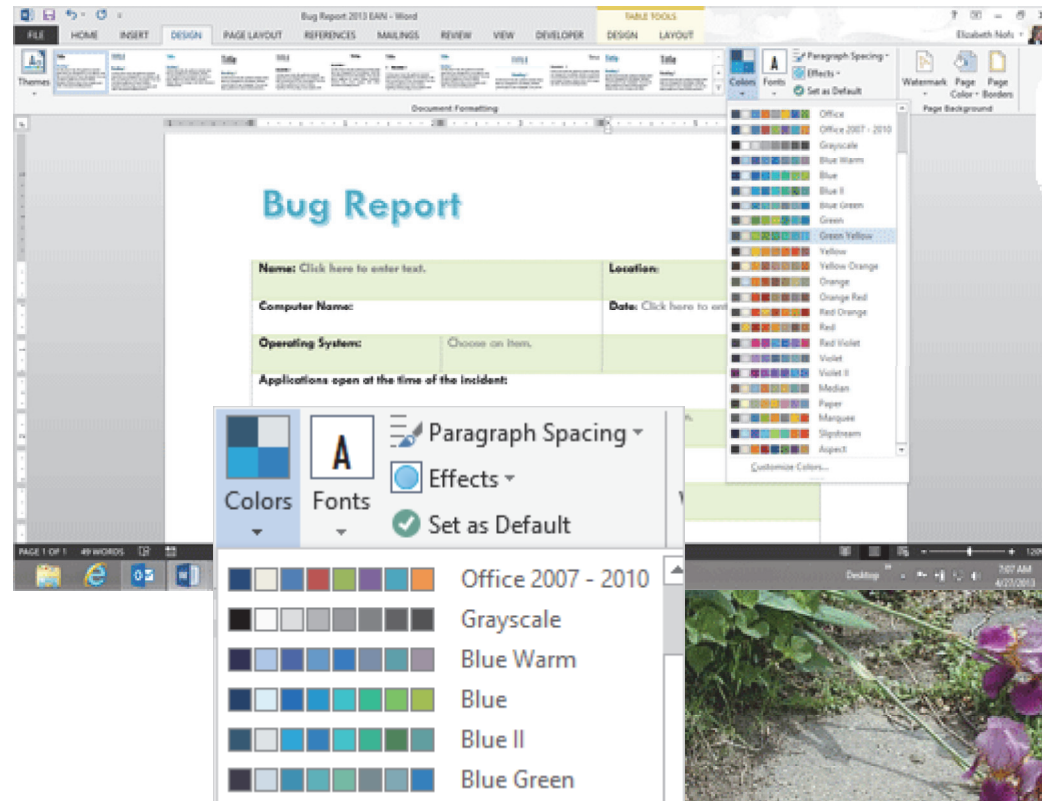
Go to **Design -> Document Formatting**. Click on **Colors**.

**What Do You See?** At the bottom of the Built In Colors is the option to **Customize Colors**.

[Customize Colors...](#)

Click **Customize Colors...** Keep going.

## Design-> Document Formatting -> Colors



....That explains why its hard to get out of bed.

Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Create Custom Color themes



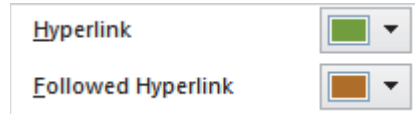
## Modify the Theme Color

### 7. Try it: Create New Theme Colors

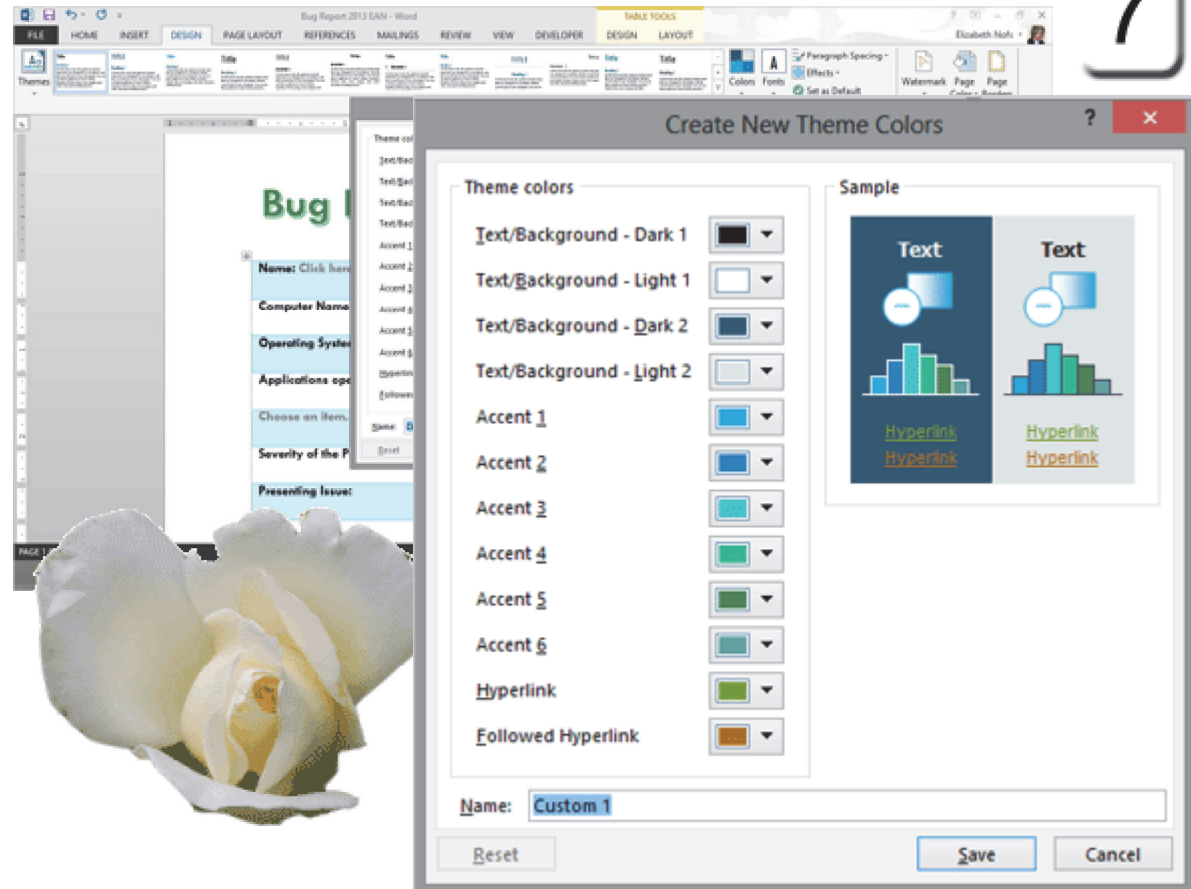
The **Theme** colors are applied to the Text and Background in your document. The **Accent** colors are applied to all of the Shapes, SmartArt and Charts.

**Save** your changes. Keep going...

**Memo to Self:** Hyperlinks change color depending on if you have not seen the link (blue) or if you have already followed that link (purple.) You may want to leave the hyperlinks in the default colors. It's what people are expecting.



Design-> Document Formatting -> Colors



Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Create Custom Color themes



## Modify Theme Fonts

The Font libraries use different type faces for the headlines and body type. Keep in mind that headlines can be fanciful and creative. Body text should be Sans Serif and easy to read.

### 8. Try it: Create New Theme Fonts

Go to **Design -> Document Formatting**.  
Go to **Fonts-> Customize Fonts**.

[Customize Fonts...](#)

You will be prompted to fill in the blanks.

**Heading Font:** Comic Sans MS.

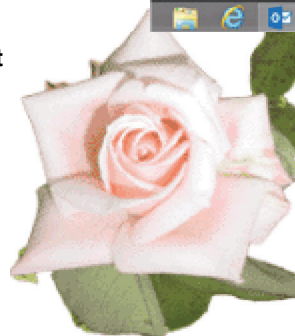
**Body Font:** Comic Sans MS.

**Name:** Comic Theme.

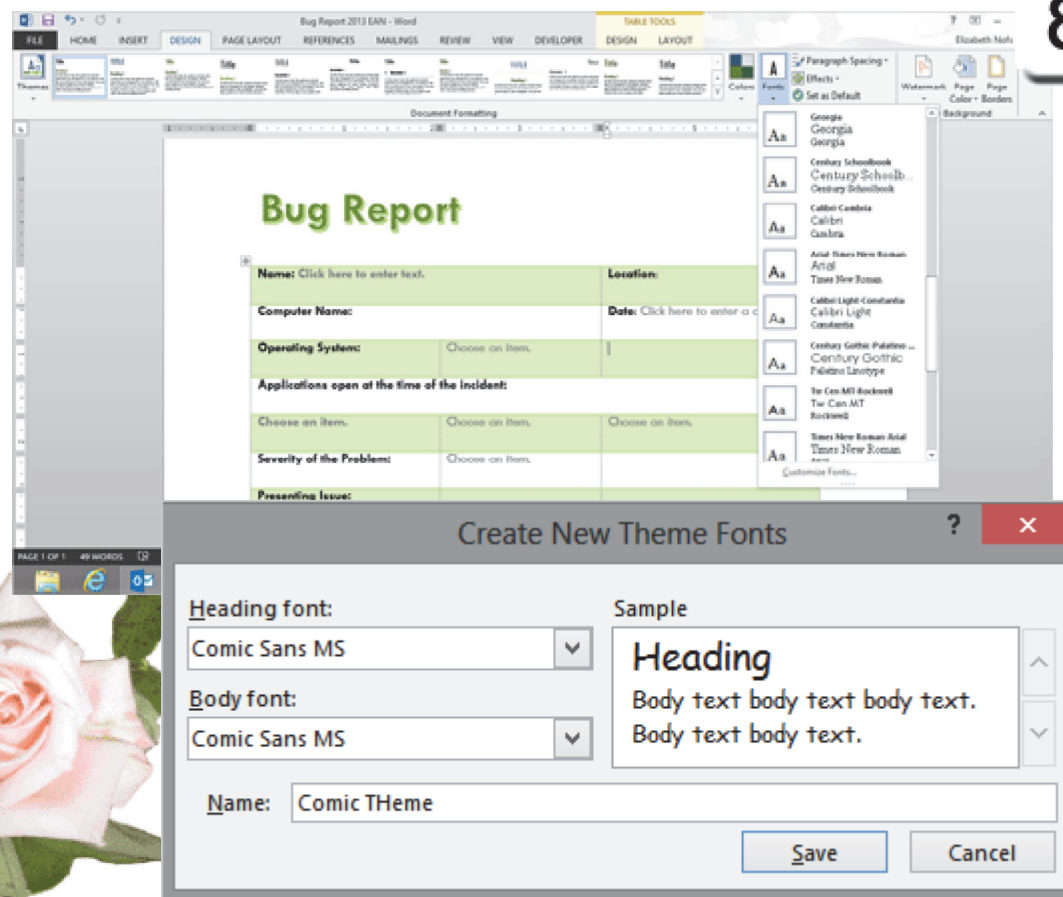
Please **Save** the Theme Fonts.

**And Do This: Save Where We Are At**

Go to **File->Save**.



Design-> Document Formatting -> Fonts



8

Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Create Custom Font Themes



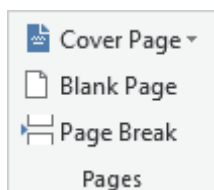
## Add a Cover Page

Professional documents, such as a Request for Proposal or Quarterly Report generally have a **Cover Page**.

### 1. Try This: Insert a Cover Page

Place your cursor at the top of the first page in your sample document.

Go to **Insert-> Pages-> Cover Page**.

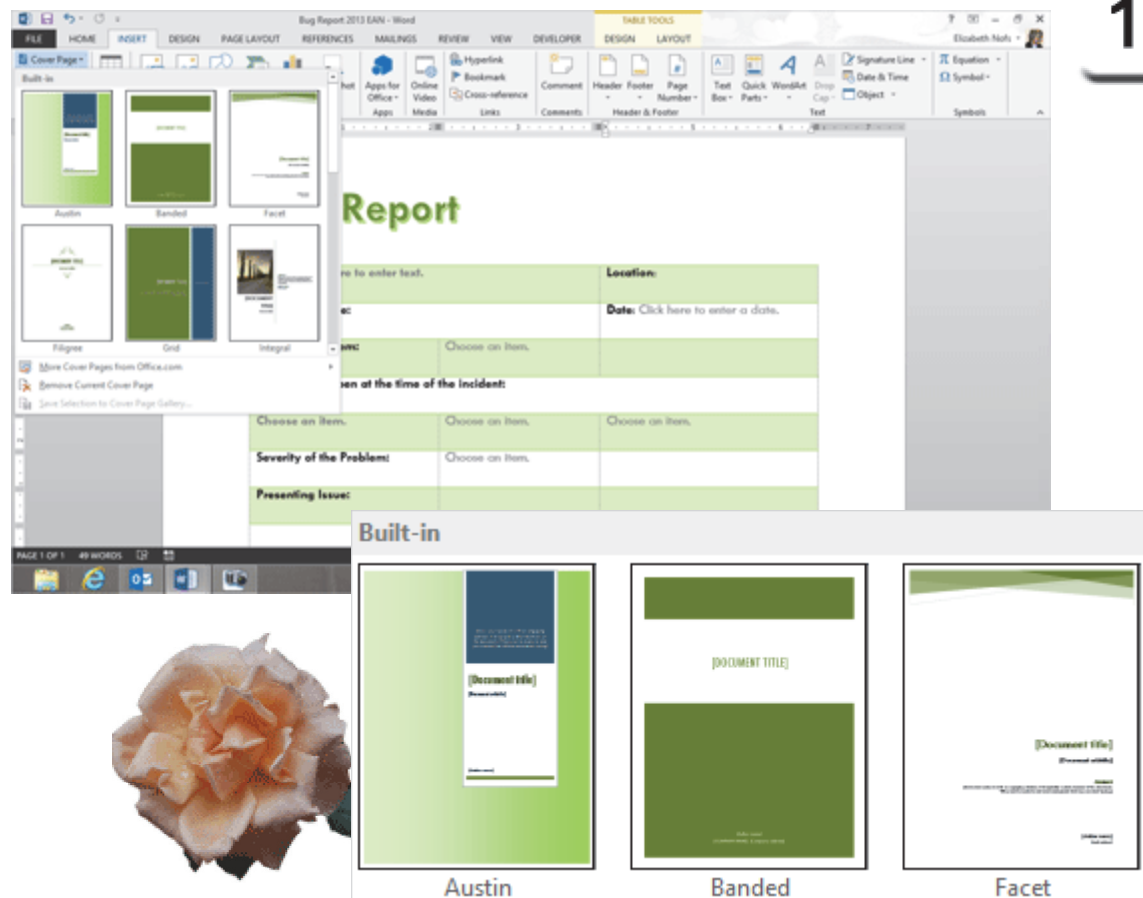


**What Do You See?** Word 2013 has a gallery of Cover Page templates. These templates have interesting Quick Parts. You can also use your own custom Quick Parts.

Choose: **Retrospect**. Keep going...



## Insert-> Pages -> Cover Page



1

Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Create a Cover Page



## Edit the Cover Page

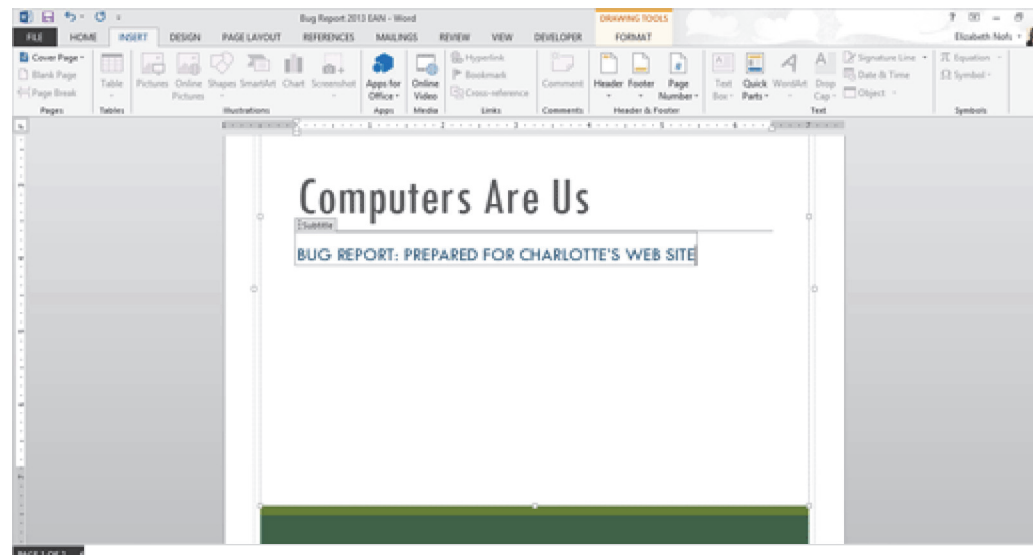
**What Do You See?** The new Cover Page includes several Quick Part placeholders.

### 2. Try it: Edit the Cover Page

Document Title: Computers Are Us  
Subtitle: Bug Report: Prepared for Charlotte's Website.

Keep going...

Insert -> Pages-> Cover Page



2



# Computers Are Us

Subtitle

BUG REPORT: PREPARED FOR CHARLOTTE'S WEB SITE

Exam 77-425 Microsoft Word 2013 Expert  
4.0 Create Custom Word Elements  
4.1 Create and Modify Building Blocks: Edit the Cover Page

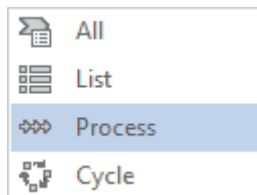




## Insert SmartArt

This document will use SmartArt to illustrate the Bug Report process.

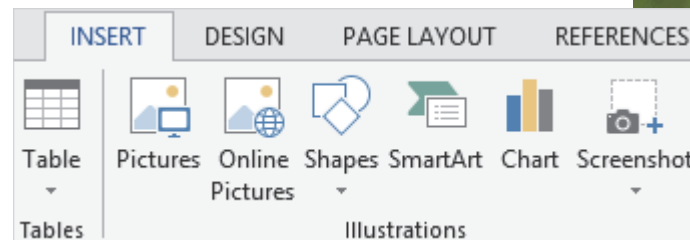
**3. Try This: Insert SmartArt**  
Go to **Insert -> Illustrations**.  
Go to **SmartArt-> Process**.



**Choose:** Continuous Block Process.

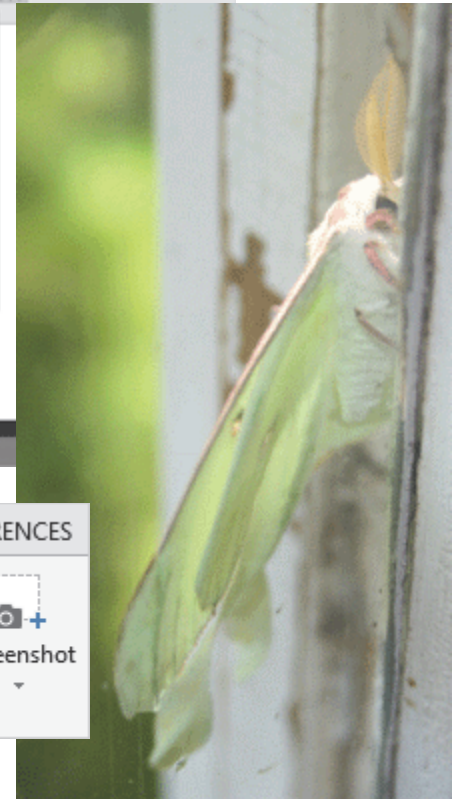
Keep going...

**Insert -> Illustrations-> SmartArt ->Process**



Exam 77-418 Microsoft Word 2013  
5.0 Insert and Format Objects  
5.2 Insert and Format Shapes and SmartArt: Insert SmartArt

3





## Modify the SmartArt

### 4. Try This, Too: Modify the SmartArt

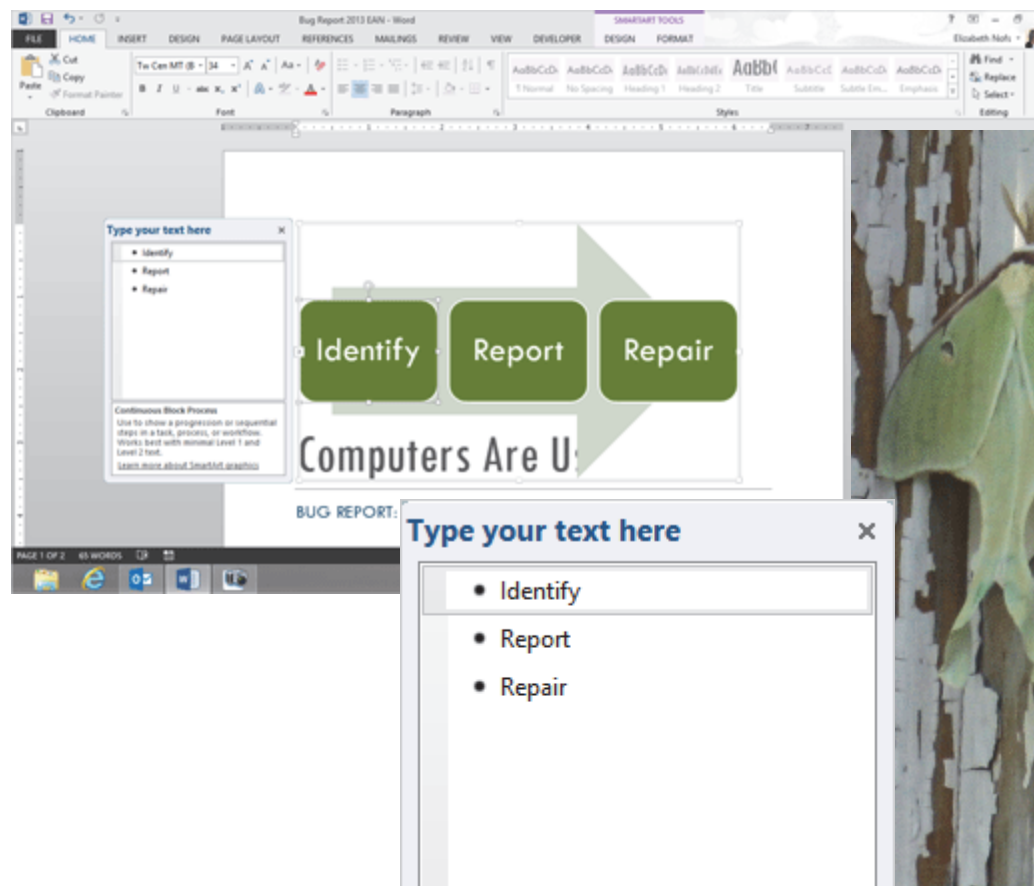
Enter the following type:

Identify  
Report  
Repair

**What Do You See?** The SmartArt will update in real-time as you edit the text. Keep going...

**Memo to Self:** You can type ENTER on the keyboard to add a new bullet.

Insert -> Illustrations-> SmartArt ->Process



4

Exam 77-418 Microsoft Word 2013  
5.0 Insert and Format Objects  
5.2 Insert and Format Shapes and SmartArt: Modify the SmartArt



## Format the SmartArt

**SmartArt Styles** and **Theme Effects** can dramatically improve the appearance.

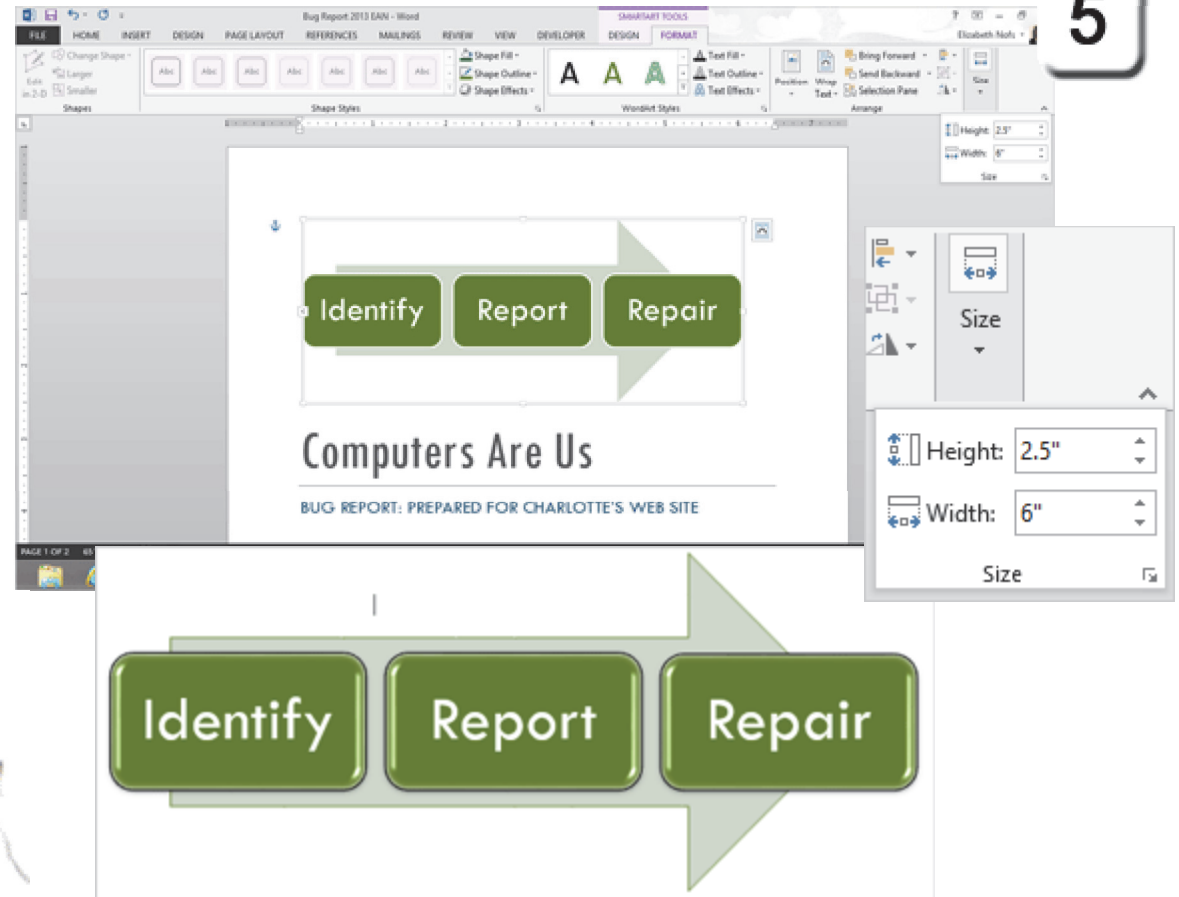
**5. Try This: Use the SmartArt Tool**  
Go to **SmartArt Tools->Format->Size**.  
Edit the **Height: 2.5"**  
Edit the **Width: 6"**

**Try This, Too: Apply a Theme Effect**  
Go to **Design -> Document Formatting**.  
Apply a **Theme**.

Keep going...



Design -> Document Formatting -> Theme



Exam 77-418 Microsoft Word 2013  
5.0 Insert and Format Objects  
5.2 Insert and Format Shapes and SmartArt: Modify the SmartArt



## Set Theme as Default

Say you spent some time designing your a Theme: Color palette, Fonts and Effects. You can save your Theme as the **Default** theme. This is the Theme that can be used with each new document that you create.

### 6. Try it: Set Theme as Default

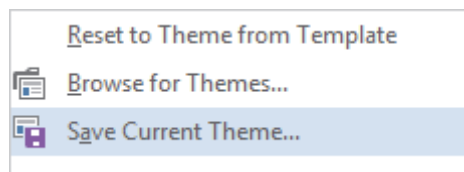
Go to **Design->Document Formatting**.

Go to **Theme**.

Select **Save Current Themes**.

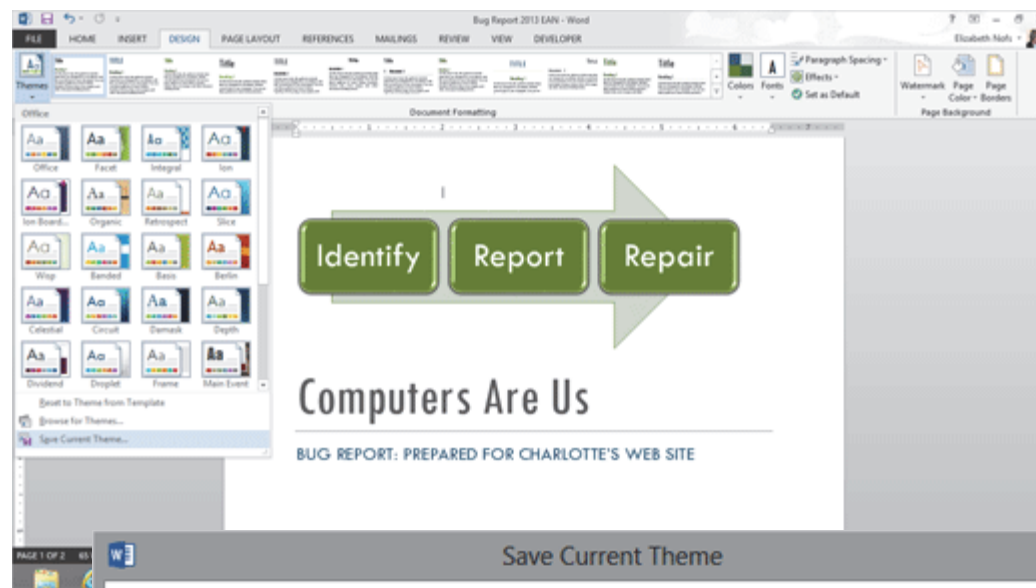
You will be prompted to enter a name for your new Office theme (\*.thmx).

OK. That will do.

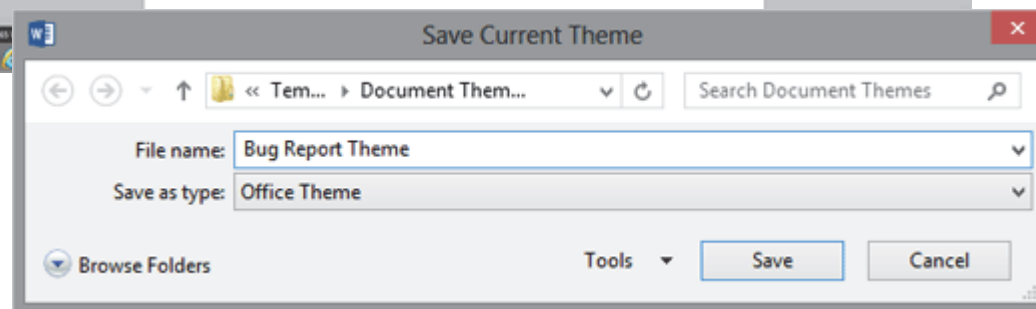


**Memo to Self:** You can also use this menu to Restore the Theme to one of the built in templates.

Design -> Document Formatting->Themes ->Save Current Theme...



6



Exam 77-425 Microsoft Word 2013 Expert

4.0 Create Custom Word Elements

4.1 Create and Modify Building Blocks: Create Custom Style Sets and Templates

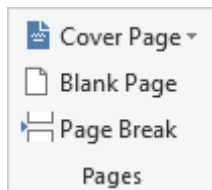


## Insert a Blank Page

There is a new option in Microsoft Word: **Screenshots**. A **Screenshot** captures an image of what you see on your computer. This would be useful in a Bug Report.

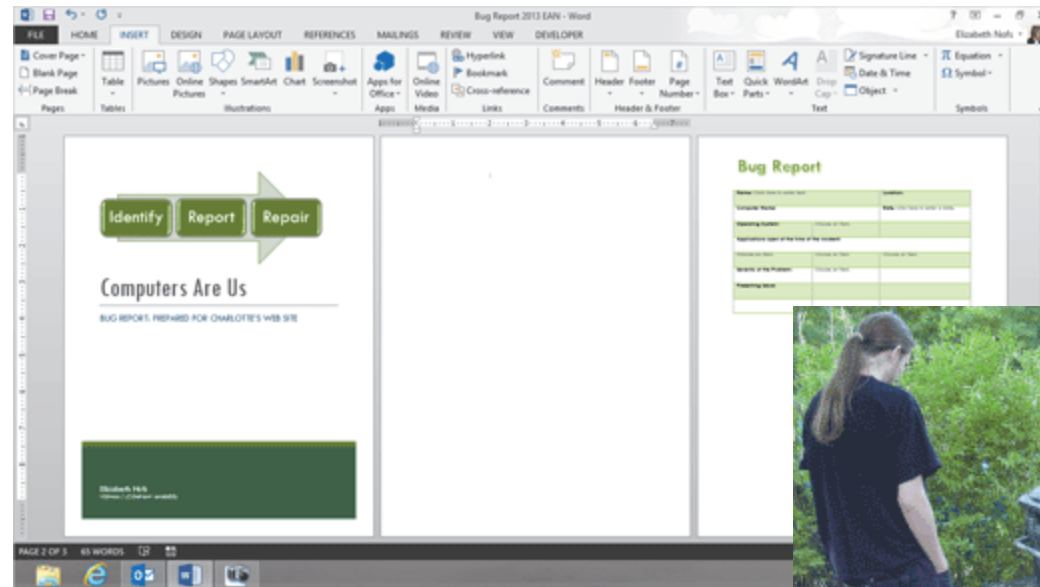
**Before You Begin:** Place your cursor at the bottom of page 1 after the Table.

**Try it: Insert a Blank Page**  
Go to **Insert -> Pages -> Blank Page**.



Keep going...

## Insert->Pages-> Blank Page



*This is the document showing all the three pages:  
View->Zoom->Multiple Pages*



*The garbage sounded funny...  
(keep going)*

Exam 77-418 Microsoft Word 2013  
2.0 Format Text, Paragraphs, and Sections  
2.3 Order and Group Text and Paragraphs: Insert Blank Pages





## Insert a Screenshot

A **Screenshot** captures a picture of any Window that you have open. Say you have a few programs open on your computer: music, E-mail, Word and Excel.

### 1. Try it: Insert a Screenshot

Go to **Insert -> Illustrations**.  
Click on **Screenshot**.

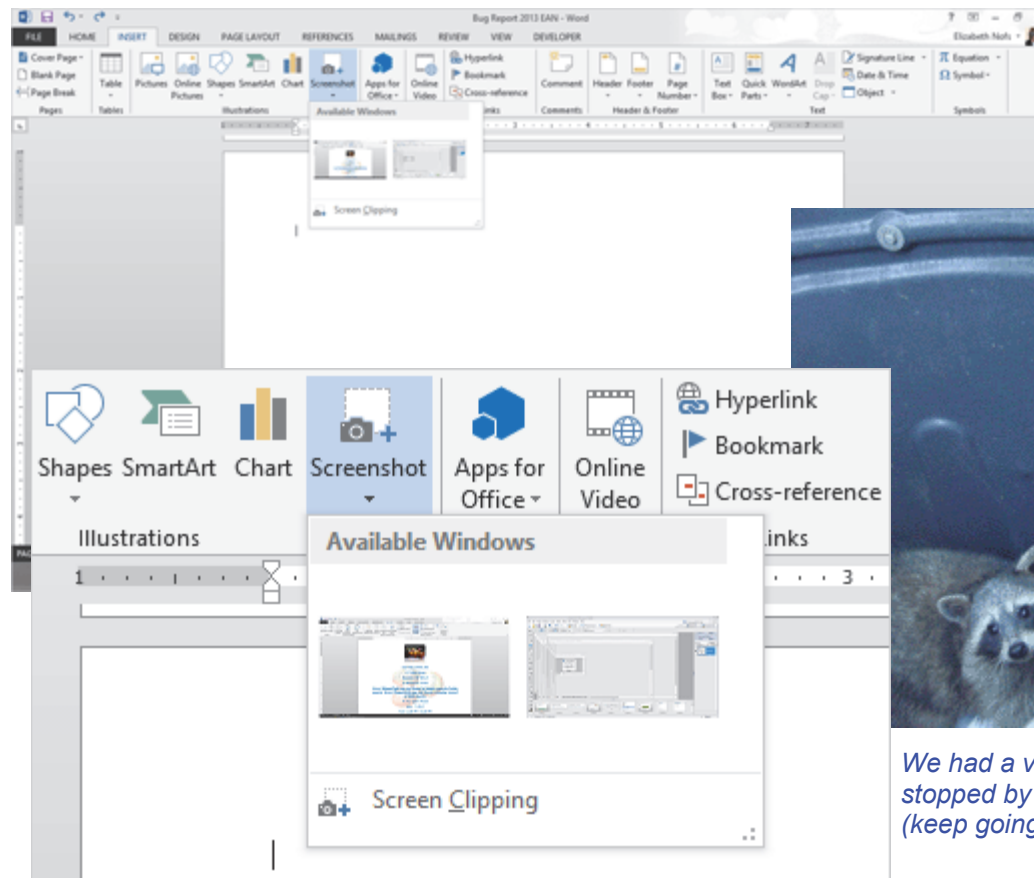
**What Do You See?** There should be a list of the Windows that you have open.

In the example on this page, there is a Word document that has an error: a mismatch between the Mail Merge Fields and the fields in the Recipients list.

Keep going...

**Memo to Self:** Any document will work. You do not have to MATCH the images here.

Insert -> Illustrations ->Screenshot



*We had a visitor who stopped by for lunch... (keep going)*

Exam 77-418 Microsoft Word 2013  
5.0 Insert and Format Objects  
5.3 Insert and Format Images: Insert Screen Captures



## Format the Screenshot

A **Screenshot** is an image. When you select the Screenshot, the Picture Tools should be available.

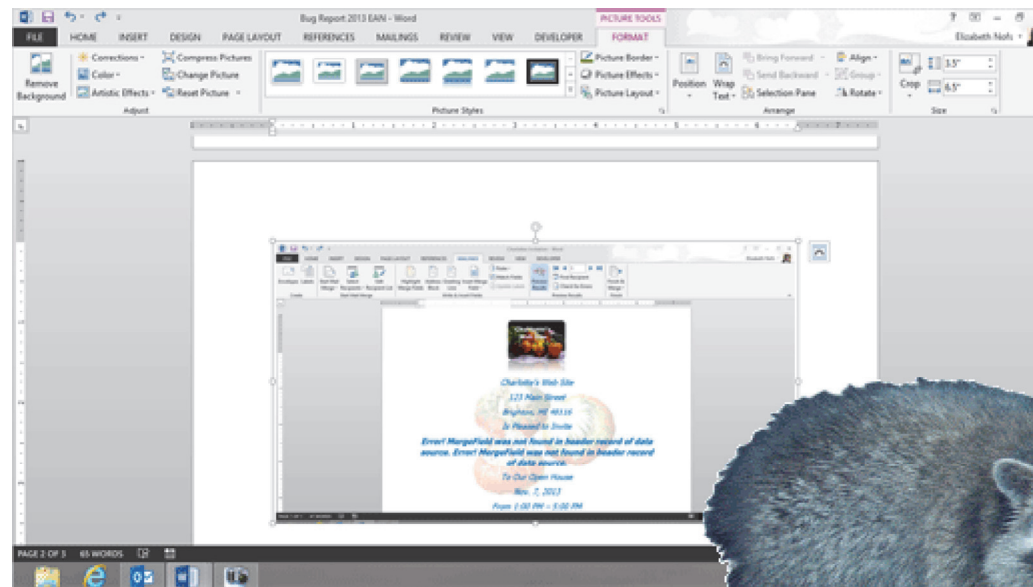
### 2. Try it: Format the Screenshot

Go to **Picture Tools -> Format**.

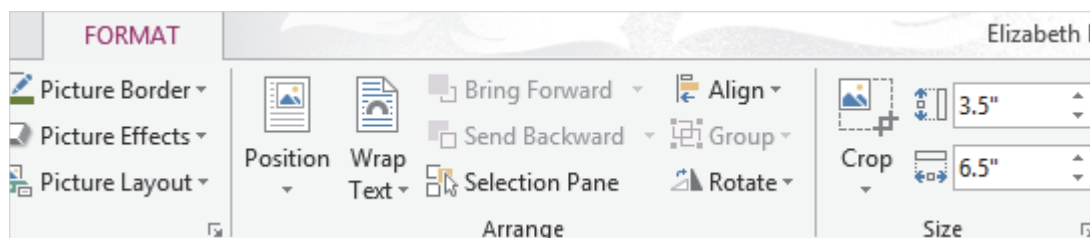
You can format the Styles, arrange the Position and Text Wrapping. You can also change the Size if you wish.

Save this document.

### Picture Tools -> Format -> Size



2



*Bon Appetite!*

Exam 77-418 Microsoft Word 2013  
5.0 Insert and Format Objects  
5.3 Insert and Format Images: Format the Screen Captures



## Link the Form to Data

The Form can be linked to a Table in Word, Excel, Outlook or an **Access database**. Each time you open the Form, the merge can automatically look up the name, address, and phone as well as custom Fields.

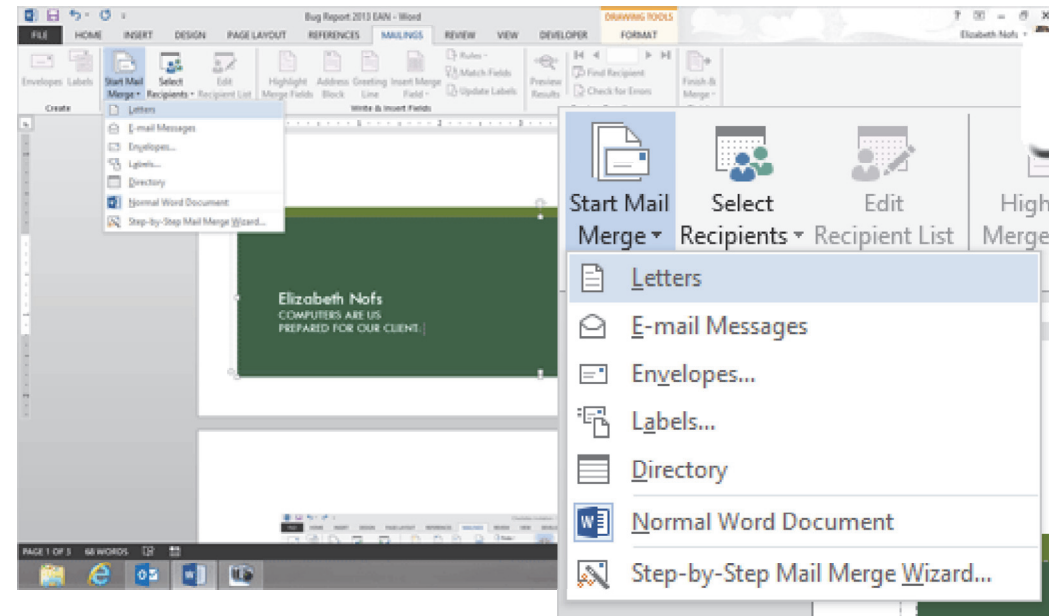
**Before You Begin:** There are two parts to a Mail Merge: the Main document, or Form, and the Data. In this example, the Bug Report Form is the Main document. The Data will be a Recipients database with custom fields that we will create in the following pages.

### 1. Try it: Create a Mail Merge

Go to **Mailings -> Start Mail Merge**.  
Go to **Start Mail Merge->Letters**.  
Keep going...

**Where Have You Seen This, Before?** A Mail Merge looks up data in a Table, too.

**Mailings -> Start Mail Merge->Start Mail Merge->Letters**



Exam 77-426 Microsoft Word 2013 Expert  
1.0 Manage and Share Documents  
1.1 Manage Multiple Documents: Link to External Data



## Enter the Data

2. Try it: Type New List

Go to **Mailings\_> Start Mail Merge.**

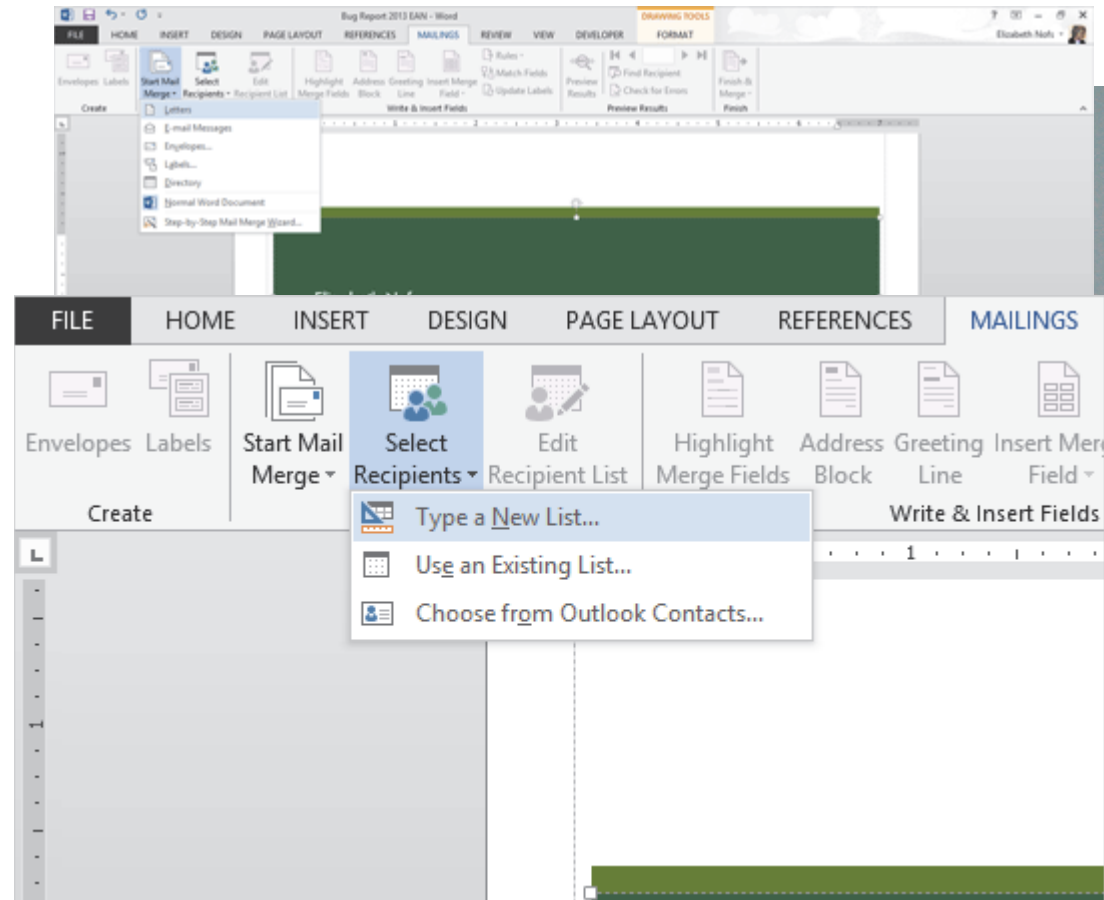
Go to **Select Recipients.**

Click on **Type New List.**

Keep going...



Mailings -> Start Mail Merge->Select Recipients ->Type New List



Exam 77-425 Microsoft Word 2013 Expert

3.0 Create Advanced References

3.3 Manage forms, Fields, and Mail Merge Operations: Manage Recipient Lists



## Customize Columns

**What Do You See?** You will be prompted to Type the recipients names into the **New Address List**.

The Address list includes the First Name, Last Name, Company, Address and Phone. You can add your own fields if you wish. In this example, the Bug Report will include the User Name and Password.

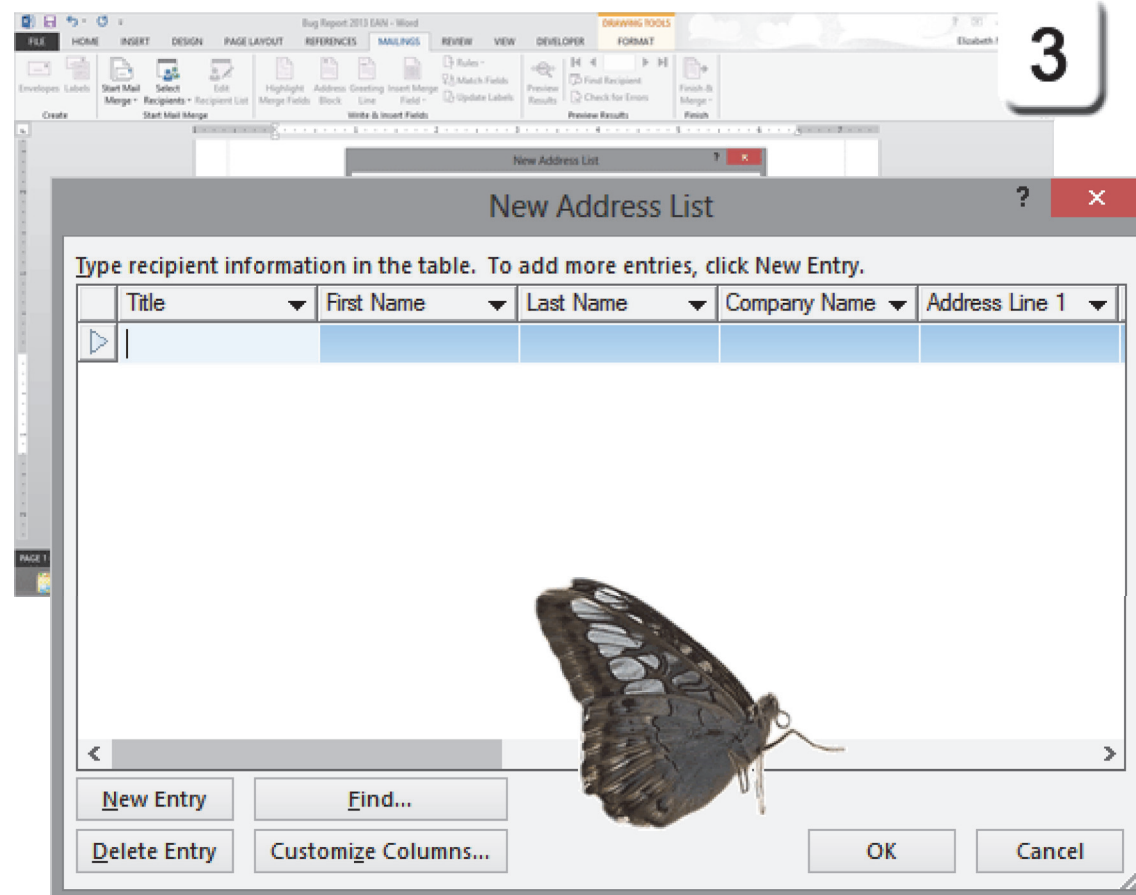
Here are the steps.

**3. Try it: Customize the Columns**  
Click on **Customize Columns**.

Keep going...

**Memo to Self:** When you add new Fields to the New Address List, you are adding them to a Table in Microsoft Access.

Mailings -> Start Mail Merge->Select Recipients ->Type New List



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Add Custom Fields





## Add Fields to the Address List

**What Do You See?** When you click on Customize Columns, you should see a **Customize Address List** that shows all of the Field Names in your table. Here are the steps you can take to edit the list.

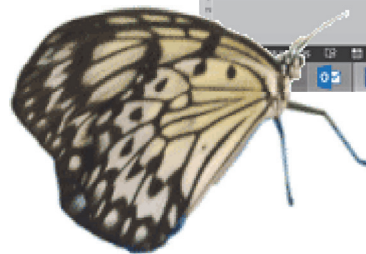
### 4. Try This: Add New Fields

Go to **Add**. The **Add Field** window will open.

**Type a name:** User Name.

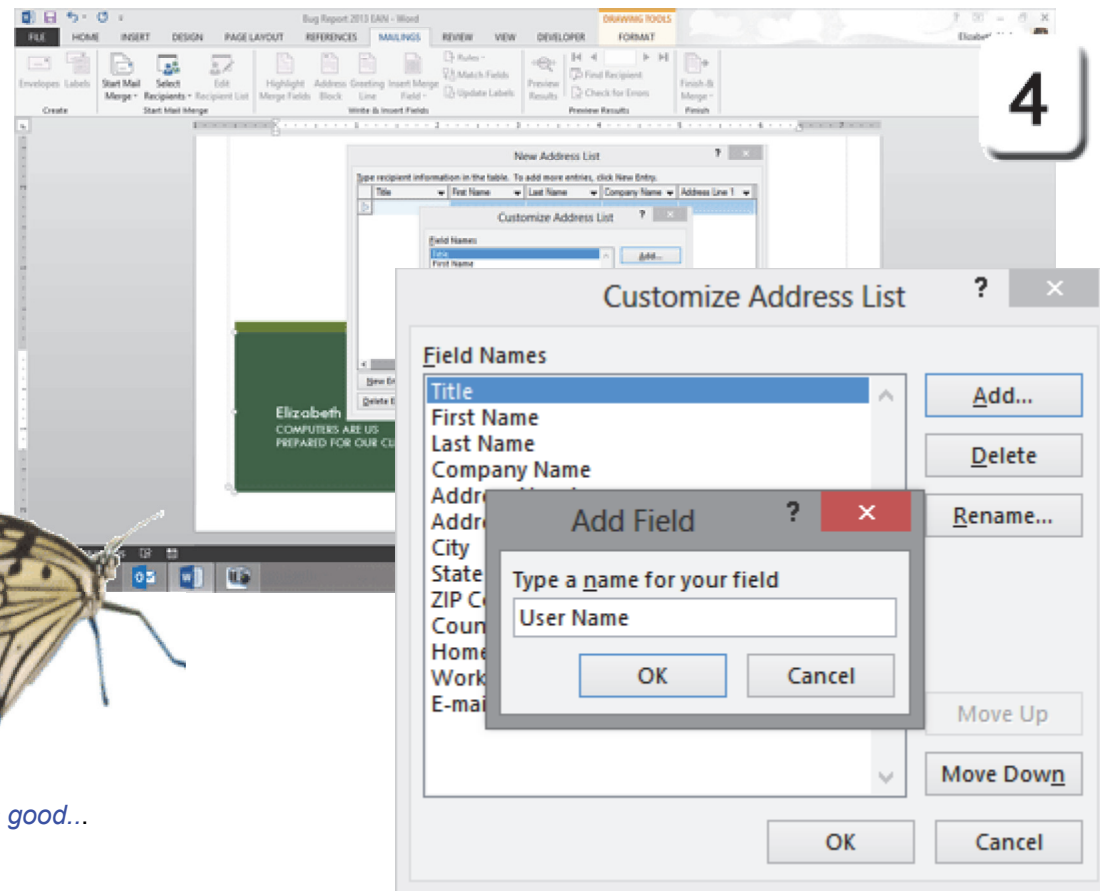
**Add another name:** Password.

Click **OK**. Keep going...



*Yes, that looks good...*

Mailings -> Start Mail Merge->Select Recipients ->Type New List ->Customize Columns



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Add Custom Fields



## Add Some Sample Names

**What Do You See?** You should return to the New Address List. In addition to the default fields, you should see the two new fields: User Name and Password.

### 5. Try This: Add Some Names

Please add three sample names to this New Address List. You can type the names that you see in this screenshot or create your own if you wish.

When you are done editing the list, click on **OK to Save** your data.

Keep going...



Mailings -> Start Mail Merge-> Select Recipients ->Type New List

5

**New Address List**

Type recipient information in the table. To add more entries, click New Entry.

First Name	Last Name	User Name	Password	Company Name
Deeter	Poohbah	DeeterP	aok123	Charlotte's We...
Mary	Contrary	MaryC	CrazyC	Charlotte's We...
Bonny	Bondie	BonnyB	Aloha	Charlotte's We...

New Entry Find... Delete Entry Customize Columns... OK Cancel

Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Manage Recipients List



## Save the Database

### 6. Try This: Save the Data

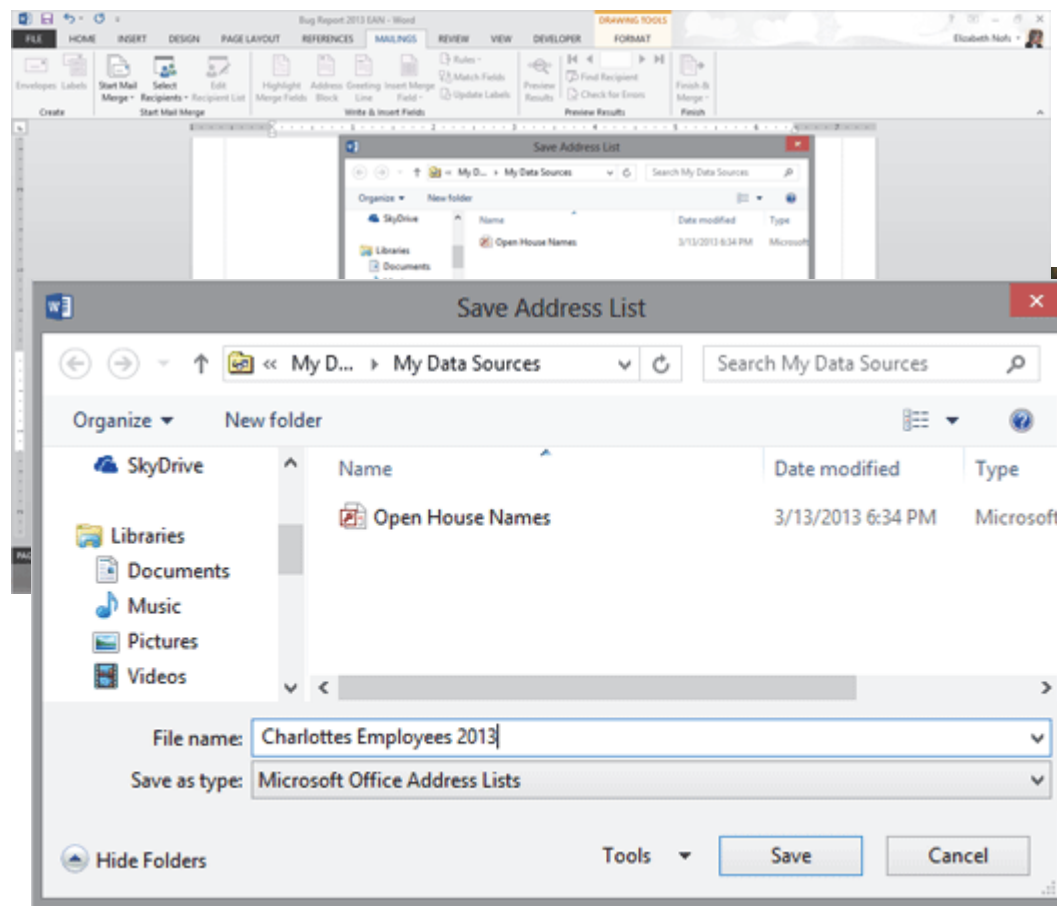
**Where Are You Saving It?** By default, Microsoft Word 2013 saves the Office Address List in your Documents in a folder called My Data Sources.

**File Name:** Charlottes Employees 2013.

**Save as Type:** An Office Address List is a Microsoft Access database. There is a lot that you can do with a database.

Keep going...

Mailings -> Start Mail Merge->Select Recipients ->Type New List



6



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Manage Recipients List



## Add the Merge Fields

The Form is linked to a database. All of the Merge Fields will be available when you go to **Insert Merge Field**,

**Before You Begin:** This lesson begins on the cover page.

### 7. Try it: Insert Merge Fields

Go to **Mailings -> Write and Insert Fields**.

Click on: **Insert Merge Fields**.

Add the following fields to the Form:

First\_Name

Last\_Name

User\_Name

Password

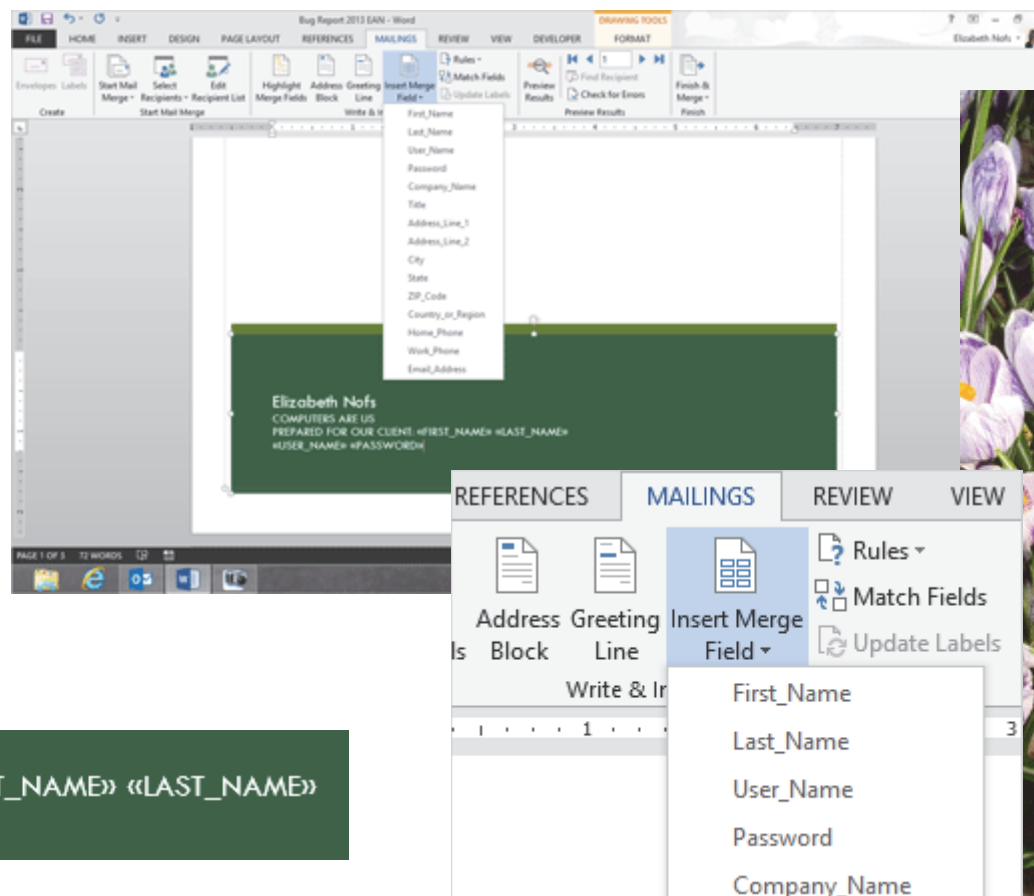
Company Name

**Save** your Form.

Keep going...

COMPUTERS ARE US  
PREPARED FOR OUR CLIENT: «FIRST\_NAME» «LAST\_NAME»  
«USER\_NAME» «PASSWORD»

## Mailings -> Write & Insert Fields-> Insert Merge Fields



7

Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Insert Merge Fields



## Preview the Mail Merge

8. Try it: Preview the Mail Merge  
Go to **Mailings -> Preview Results**.  
Click on **Preview Results**.

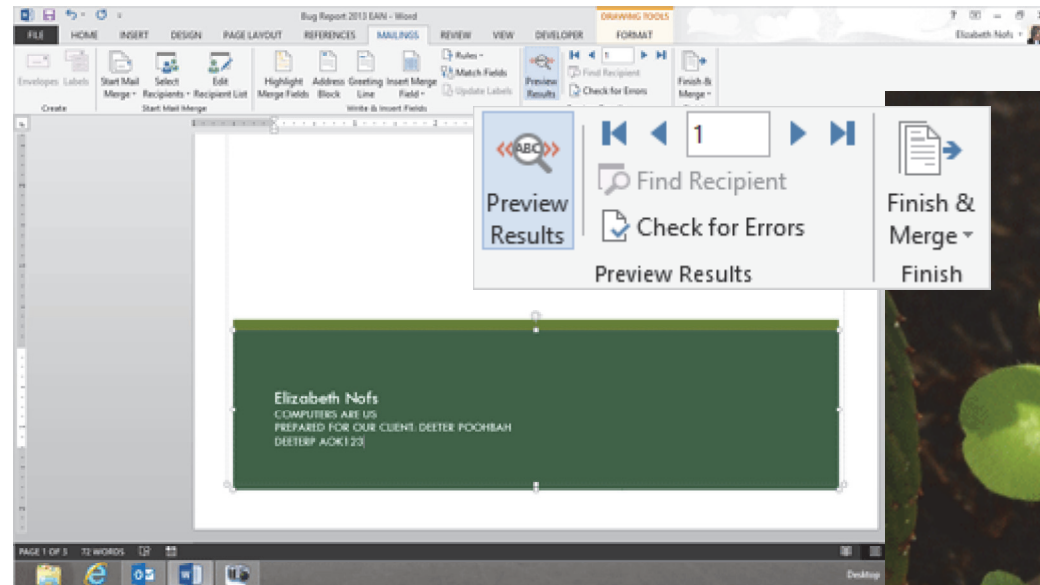
**What Do You See?** The Mail Merge Preview should include the data from the **Office Address List**.

OK, that looks good. We used a Mail Merge to look up the client's name as well as our custom Fields.

One more question and answer.  
Turn the page...

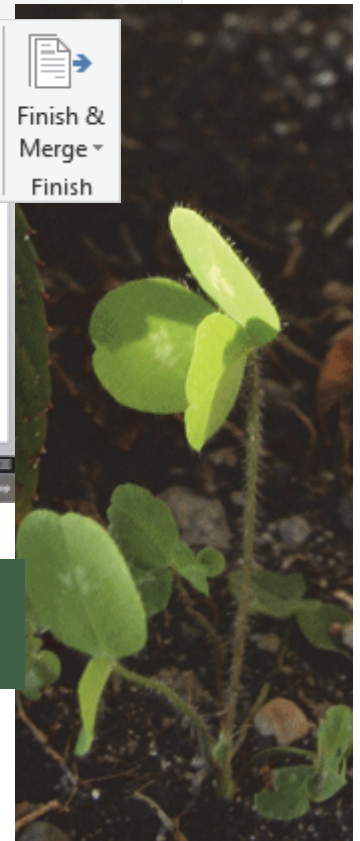


Mailings ->Preview Results->Preview Results



8

COMPUTERS ARE US  
PREPARED FOR OUR CLIENT: DEETER POOHBAH  
DEETERP AOK123



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations: Preview the Mail Merge





## Open the Form

What does it look like when you open a Form that is linked to a database or spreadsheet?

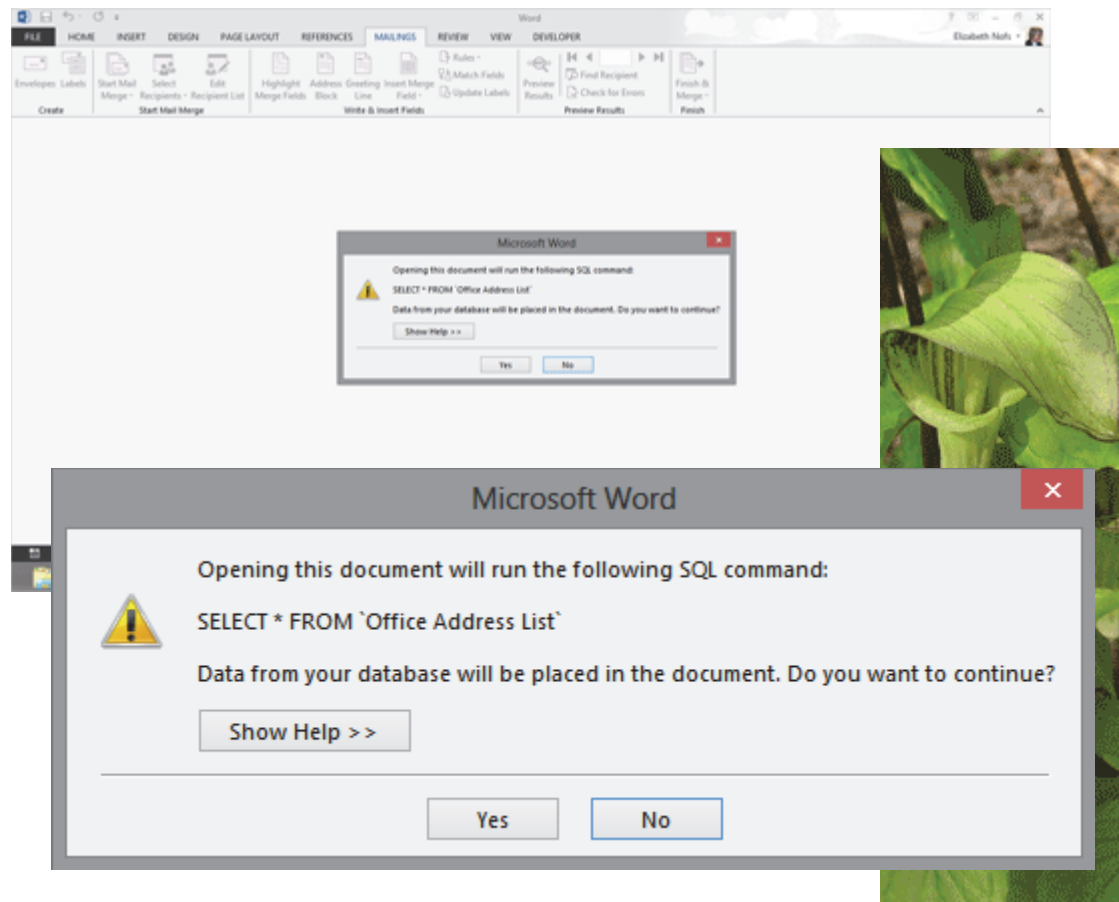
### Try It: Open the Form

Please Close your Form and Open it again.

**What Do You See?** When you open a document that is linked to a data source, you will be prompted that data from your database will be placed in your document. If you say yes, Microsoft Word will look for your database and select all of the records in the **Office Address List**.

**Memo to Self:** The asterisk ( \*) is a wildcard that means select everything.

### File -> Open



Exam 77-425 Microsoft Word 2013 Expert  
3.0 Create Advanced References  
3.3 Manage forms, Fields, and Mail Merge Operations



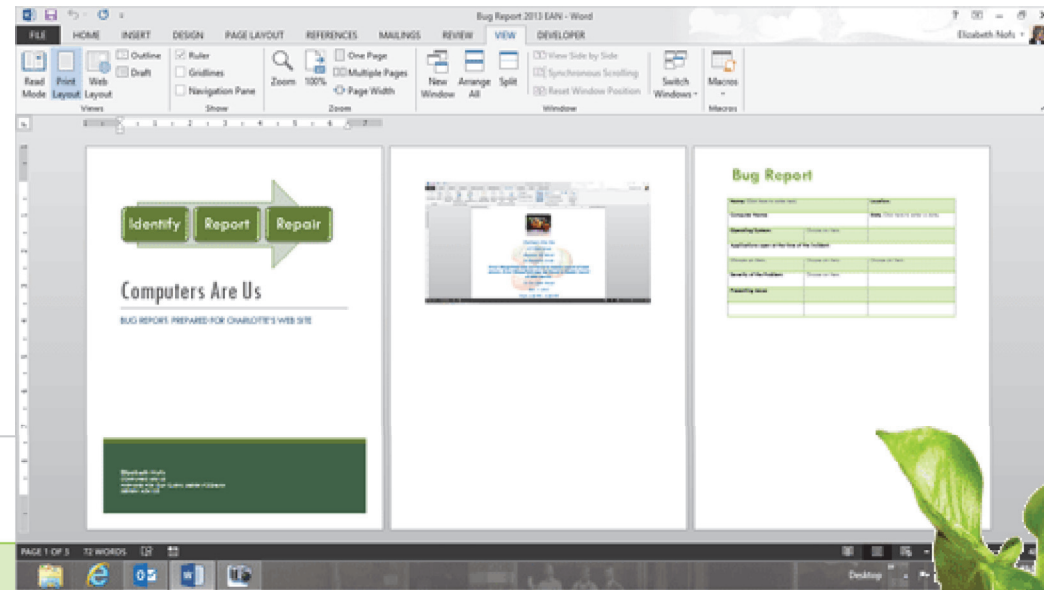
## Basic Form Design

This lesson introduced basic Form design with the tools available on the **Developers Toolbar**. We began by formatting a Table to set up the Form layout. This Form has several controls: Text, Date Picker and Combo Boxes.

In addition to the controls, this Form is linked to a Microsoft Access database: an Office Address List.

Date	Click here to enter a date.																																																	
Choose an i	<div><div>April 2013</div><table border="1"><thead><tr><th>Su</th><th>Mo</th><th>Tu</th><th>We</th><th>Th</th><th>Fr</th><th>Sa</th></tr></thead><tbody><tr><td>31</td><td>1</td><td>2</td><td>3</td><td>4</td><td>5</td><td>6</td></tr><tr><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td><td>12</td><td>13</td></tr><tr><td>14</td><td>15</td><td>16</td><td>17</td><td>18</td><td>19</td><td>20</td></tr><tr><td>21</td><td>22</td><td>23</td><td>24</td><td>25</td><td>26</td><td>27</td></tr><tr><td>28</td><td>29</td><td>30</td><td>1</td><td>2</td><td>3</td><td>4</td></tr><tr><td>5</td><td>6</td><td>7</td><td>8</td><td>9</td><td>10</td><td>11</td></tr></tbody></table><div>Today</div></div>	Su	Mo	Tu	We	Th	Fr	Sa	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20	21	22	23	24	25	26	27	28	29	30	1	2	3	4	5	6	7	8	9	10	11
Su	Mo	Tu	We	Th	Fr	Sa																																												
31	1	2	3	4	5	6																																												
7	8	9	10	11	12	13																																												
14	15	16	17	18	19	20																																												
21	22	23	24	25	26	27																																												
28	29	30	1	2	3	4																																												
5	6	7	8	9	10	11																																												

## View -> Zoom->Multiple Page



COMPUTERS ARE US  
PREPARED FOR OUR CLIENT: DEETER POOHBAH  
DEETERP AOK123





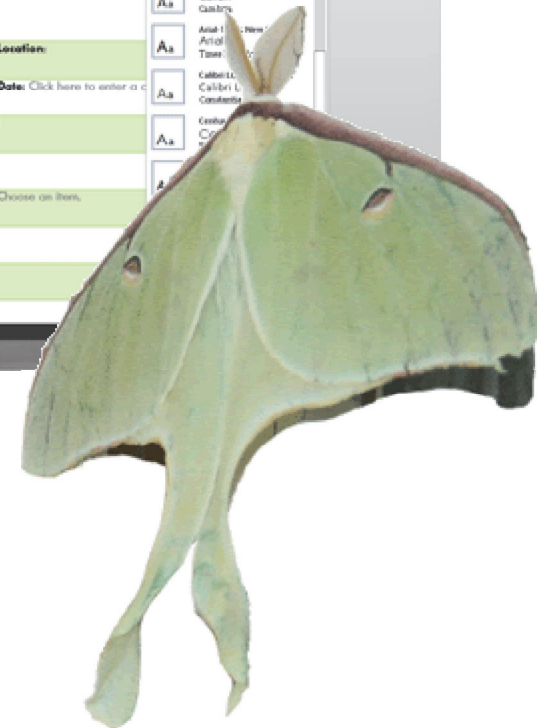
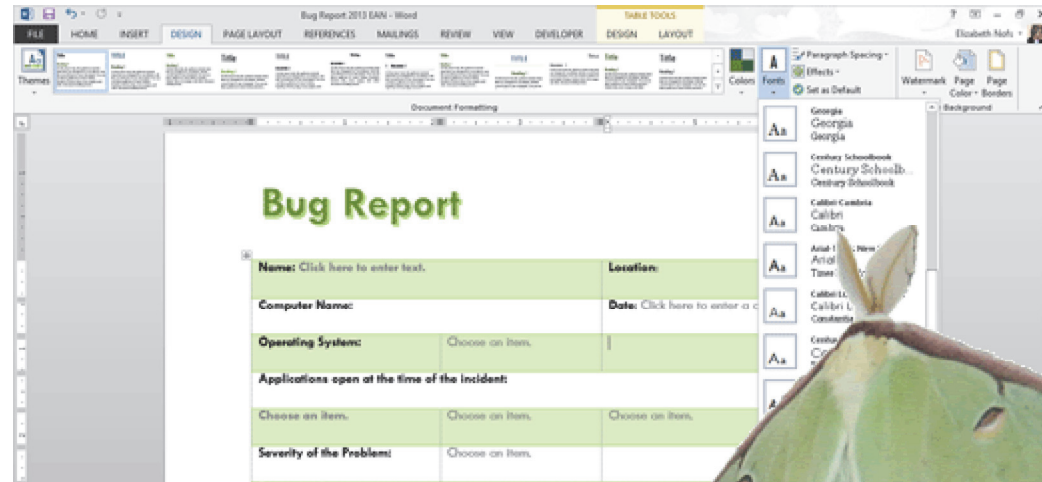
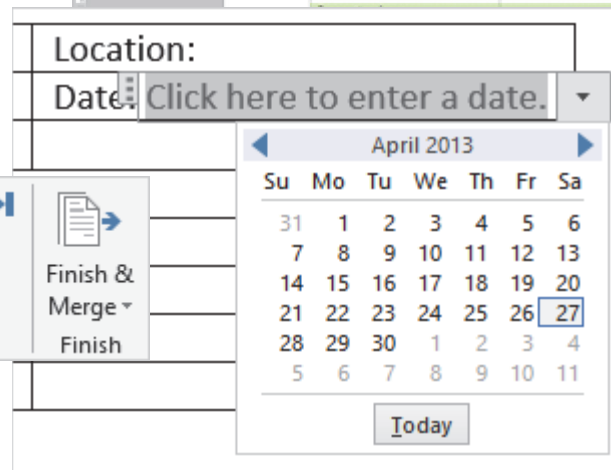
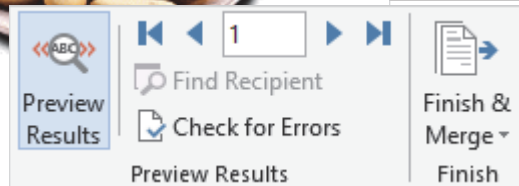
## Summary

This is a good start, but it is just a beginning.  
Microsoft Office 2013 is programmable.

You can automate many functions with Macros  
and Visual Basic for Applications (VBA.).

The best is yet to come!

But for now, go get a cookie.  
You done good!





# Practice Activity

## Who Done It?

**Before You Begin:** Start Microsoft Word 2013. You should see a new, blank document.

### Try This: Do the following steps

1. Open a New Word document.
2. Insert a table with three columns and two rows.
3. Insert the following controls in the locations indicated:

Name (Text Form Control)	Date (Date Picker)	Department (Drop Box)
Location (Drop Box)		Attending (Drop Box)

#### List of Departments:

Human Resources  
Engineering  
Marketing  
Sales  
Customer Relations

#### List of Locations:

Brighton  
Ann Arbor  
Detroit  
Traverse City  
(Sort the locations in alphabetical order)

#### Attending box:

Yes  
No  
No Response

4. Apply the **Metro** Theme to your document.
5. Save your work as Advanced Form Practice Activity.





## Test Yourself



1. Which of the following is the correct command to turn on the Developer Ribbon?

- a. Go to Tools-> Options->Ribbons-> Developer Ribbon
- b. Go to View-> Ribbons-> Customize Ribbon->Developer Ribbon
- c. Go to File-> Options-> Customize Ribbons

Tip: Advanced Word, page 185

2. Which of the following is an available form control on the Developer Ribbon? (select all correct answers)

- a. Text Form Control (plain text)
- b. Text Form Control (rich text)
- c. Date Picker
- d. Combo Box
- e. Drop Down List

Tip: Advanced Word, page 186, 187, 188

3. Restrict Editing is one way to protect a document. Which Ribbon has this command?

- a. Home
- b. Review
- c. File
- d. Share
- e. Developer

Tip: Advanced Word, page 190

4. Which of the following is true about Themes? (select all correct answers)

- a. Cannot be customized
- b. Theme colors are applied to Text and Backgrounds
- c. Accent colors are applied to shapes, SmartArt and Graphics
- d. Apply to everything in the document

Tip: Advanced Word, page 197, 199

5. Which of the following commands are in the Insert-> Pages group? (select all correct answers)

- a. Cover Page
- b. Blank Page
- c. Page Break
- d. New Page

Tip: Advanced Word, page 201

6. A screenshot is a picture (snapshot) of a current window open on the computer.

- a. True
- b. False

Tip: Advanced Word, page 208

7. What is the default file format for Microsoft Office Address List?

- a. Excel File
- b. Word Document
- c. Outlook Contacts File
- d. Access Database

Tip: Advanced Word, page 210, 215

8. What does Microsoft Office do when opening a file that is linked to a data source?

- a. Ask if it is okay to put the data into the document
- b. Give an error message
- c. Open the file normally

Tip: Advanced Word, page 217, 218

