ADVANCED WORD, AND INTEGRATED MS OFFICE

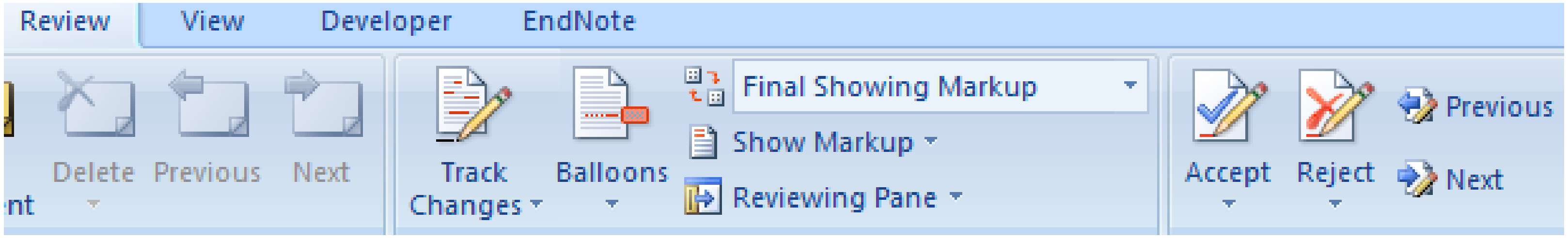
SPRING 2011

TRACKING AND MANAGING DOCUMENT CHANGES

- When two or more people collaborate on a document, one person usually creates and owns the document and the others review it.
- Reviewers can turn on the **Track Changes** feature so that the revisions they make to the document are recorded without the original text being lost.
- Changed text shows in a different color and underlined.
- Deleted text shows up in a comment balloon at the margin of the document and displays a vertical line in the margin to the left of any changed text to help you locate changes in the document.

TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

- Follow these steps:
  1. Click the **View** tab, click the **<u>Track Changes</u>** button (Tracking section).
     - Any changes that you make will now be tracked.

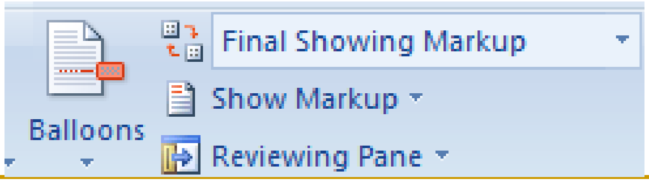


PRACTICE #1

1. Run MS-Word
2. Open the file named **OriginalExcelLP** located in the teacher's course wiki space.
3. Activate the **Track Changes** feature. button.

TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

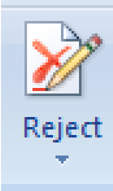
- If the revision marks are distracting, you can track changes without showing them on the screen.
  - To hide revision marks:
    - Click the down arrow to the right of the **Balloons** button and then click **Final**.
  - To show the revision marks again:
    - Click the down arrow to the right of the **Balloons** button and then click **Final Showing Markup**.



TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)

- **Accept Changes**
  - You can use this feature to incorporate a change into the document.
  - A change can be accepted individually by right-clicking on the changed text and then clicking **Accept Insertion**.
  - However, if all changes need to be accepted at once, then click the arrow to the right of the **Accept Changes** button and click **Accept All Changes in Document**.

TRACKING AND MANAGING DOCUMENT CHANGES (CONT.)



- **Reject Changes**
  - You can use this feature to refuse a change in the document.
  - A change can be rejected individually by right-clicking on the changed text and then clicking **<u>Reject Insertion</u>**.
  - However, if all changes need to be accepted at once, then click the arrow to the right of the **Reject Changes** button and click **<u>Reject All Changes in Document</u>**.

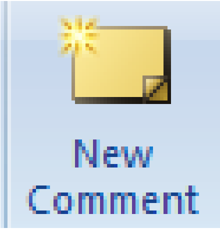
PRACTICE #2

1. Under the **MATERIALS** section add **Practice files.**
2. Replace the word **OBJECTIVE** with **GOAL**.
3. Accept the practice files changes.
4. Reject any other changes.

ADDING COMMENTS

- Allows to insert notes or comments, to ask questions or explain suggested edits.
- To insert a comment:

1. Select the text to comment on.
2. Click the **Insert Comment** button on the Review tab and type your comment**.**



PROTECTING A DOCUMENT WITH A PASSWORD

- Allows certain people to be able to open a document.
- Follow these steps:

1. Click the **Office** button, point to **Prepare**, and click **Encrypt Document**.
2. In the **Encrypt Document** dialog box, in the **Password** box, type a password, and then click **OK**.
3. In the **Confirm Password** dialog box, in the **Reenter password** box, type the password again, and then click **OK**.
4. To save the password, save the file.

PRACTICE #3

1. In the **Vocabulary** section, add a comment indicating some of the terms that will be discussed need to be included here.
2. Add a Password to open the document called **TeacherLP**.
3. Save the document as **PasswordTeacherLP.**

COMPARING AND MERGING DOCUMENTS

- Allows to compare several versions of the same document.
- Word shows the differences as tracked changes.
- If several reviewers return their changes and comments in separate documents, these changes can all be merged into a single document for easier review.
- When you compare versions of a document, you see the reviewer's changes in revision marks even if the reviewers did not track their changes as they edited.

COMPARING AND MERGING DOCUMENTS (CONT.)

- Follow these steps:

1. Open the original document that was sent for review.
2. In the **Review** tab, click **Compare** button, and then click **Combine**. The Combine Documents dialog box appears.
3. Under **Original document**, click the name of the document into which you want to combine the changes from multiple sources. If you don't see the document in the list, click **Browse for Original**
4. Under **Revised document**, browse for the document that contains the changes by one of the reviewers.

COMPARING AND MERGING DOCUMENTS (CONT.)

5. Click **More**.
6. Under **Show changes**, select the options for what you want to compare in the documents. You should generally leave this at the word level.
7. Under **Show changes in**,
   - Click **Original document** if you want to have the original document as the combination of both documents.
   - Click **Revised document** if you want to have the revised document as the combination of both documents.
   - Click **New document** if you want to have a new document as the combination of both documents.
8. Click **OK**.

PRACTICE #4

1. Use the files **JoeRevisionLP** and **MariaRevisionLP** to merge their changes with your document.
2. Accept all the changes.
3. Save your document as **[document name]MergedRevisions**, where [document name is the name that you used to save the original document to be revised.

CONTROL A DOCUMENT’S DESIGN WITH A TEMPLATE

- A template is a file that stores text, character and paragraph styles, page formatting, and macros for use as a pattern in creating other documents.
- MS-Word provides with a list of different templates to use for different occasions.
- In addition, MS-Word allows users to customize existing templates.

CONTROL A DOCUMENT'S DESIGN WITH A TEMPLATE (CONT.)

- **Using an existing template**:
  1. Click the **File** tab and click **New**. The New document dialog box appears on the left side of the screen.
  2. On the Available Templates group, click **Sample templates**. A list of existing Microsoft templates will appear on the right pane.
  3. Browse through different templates until you find a template that suits you and select it.
  4. Click **OK**. A new document is created from the template
  5. Provide the necessary information.

PRACTICE #5

1. Use the **Oriel Letter** template to send a letter to a peer educator that you want to invite as a speaker for one of your classes.
2. Fill out the necessary information (you can use fictitious names if desired).
3. Save your document as **SpeakerLetterSP2010.**

CONTROL A DOCUMENT'S DESIGN WITH A TEMPLATE (CONT.)

- **Saving Existing Template as a Different Template**:
  1. Do steps 1-5 under **Using an Existing Template**.
  2. Click the **Office** button, point to **Save As** and click **Word Template**. The Save As window appears.
  3. In the **Save as type** box, select **Document Template (*.dotx)**. Browse until you find the location where you want to save it.
  4. Type a name for your template.
  5. Click **Save**.

PRACTICE #6

1. Open the Template called **Urban Report**
2. Change the font of the title section to **Century Gothic**.
3. Change the date to italics.
4. Save this file as a Template under the name of **MyUrbanReport.**

CREATING A BIBLIOGRAPHY

- A bibliography is a list of sources, usually placed at the end of a document, that you consulted or cited in creating the document.
- In Microsoft Office Word, you can automatically generate a bibliography based on the source information that you provide for the document.
- Each time that you create a new source, the source information is saved on your computer, so that you can find and use any source you have created.

CREATING A BIBLIOGRAPHY

- When creating a bibliography you must:
  - Add new sources and citations to your document.
  - Edit the Citation Placeholder
  - Generate the Bibliography

ADDING NEW SOURCES/CITATIONS

- When you add a new citation to a document, you also create a new source that will appear in the bibliography.
- Follow these steps:

1. On the **References** tab, in the **Citations & Bibliography** group, click the arrow next to **Style**.
2. Click the style that you want to use for the citation and source.
   - For example, social sciences documents usually use the MLA or APA styles for citations and sources.

ADDING NEW SOURCES/CITATIONS

3. Click at the end of the sentence or phrase that you want to cite.

4. On the **References** tab, in the **Citations & Bibliography** group, click **Insert Citation**.

5. Do one of the following:
   - To add the source information, click **Add New Source**.
   - To add a placeholder, so that you can create a citation and fill in the source information later, click **Add new placeholder**. A question mark appears next to placeholder sources in Source Manager.

ADDING NEW SOURCES/CITATIONS

6. Begin to fill in the source information by clicking the arrow next to **Type of source**. For example, your source might be a book, a report, or a Web site.
7. Fill in the bibliography information for the source. To add more information about a source, click the **Show All Bibliography Fields** check box.

GENERATING BIBLIOGRAPHY

- Once you have all your sources, then you can create a bibliography
  - The cursor needs to be at the very end of the document before doing it.
  - On the References tab, click **<u>Bibliography</u>**.
  - Click on which style of bibliography you would like to use.

PRACTICE #6.5

1. In a new document, create new sources from the sources that you would recommend your students.
2. Type one paragraph about your own topic. Insert citations from your sources as you see fit.
3. Generate a bibliography at the end of the document.

MAIL MERGE

- You use mail merge when you want to create a set of documents that are essentially the same but where each document contains unique elements.
  - For example, in a letter that announces a new product…
  - your company logo and the text about the product will appear in each letter…
  - …and the address and greeting line will be different in each letter.

MAIL MERGE

- There are five main steps in the mail merge process:

1. Setup the main document
2. Connect the document to a data source.
3. Refine the list of recipients or items
4. Add placeholders (mail merge fields) to the document.
5. Preview and complete the merge.

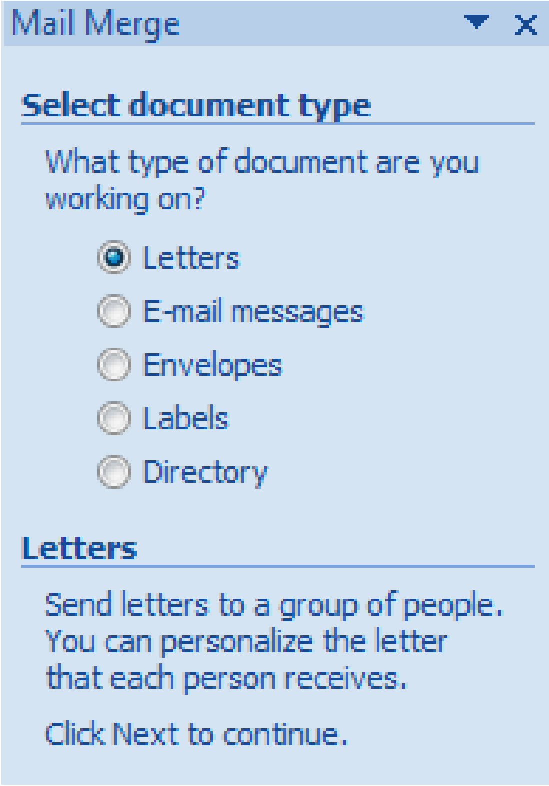
MAIL MERGE – START THE MM PROCESS

- Follow these steps (make sure you have a blank document):
  - In the **Start Mail Merge** group on the **Mailings** tab, click **Start Mail Merge**
  - Click **Step by Step Mail Merge Wizard**. The Mail Merge task pane opens.
    - By using hyperlinks in the task pane, you navigate through the mail-merge process.

MAIL MERGE – SETUP THE MAIN DOC

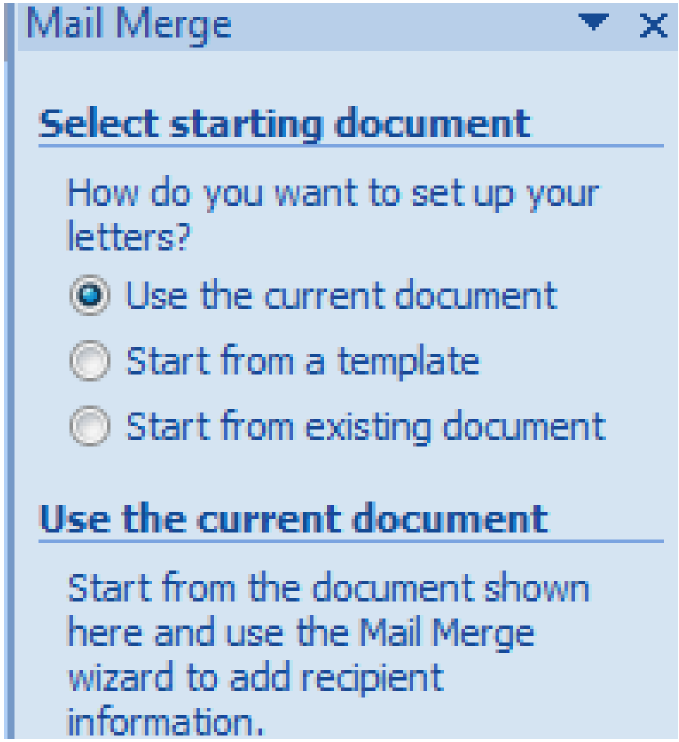
- The main document is the document that you start with. It's the model for all of the merged documents that you eventually create.

1. Choose the type of document that you want to merge information into (e-mail, letters, envelopes, directory, or labels).
2. Click **Next**.



MAIL MERGE – SETUP THE MAIN DOC

- If your main document (called the **starting document** in the task pane) is already open, or you are starting with a blank document, you can click **Use the current document**.
- Otherwise, click **Start from a template** or **Start from existing document**, and then locate the template or document that you want to use.
- Click **Next**

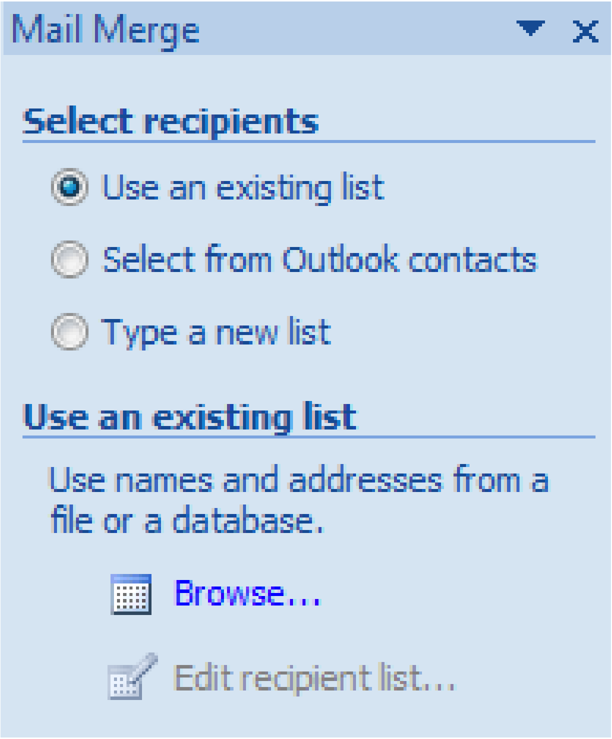


MAIL MERGE – CONNECT THE DOC TO A DATA SOURCE

- To merge unique information into your main document, you must connect to (or create and connect to) the data file where the unique information is stored.
- If you don't want to use all the data in the file in your merge, you can choose the records that you want to use.
- In this step in the mail-merge process, you connect to the data file where the unique information that you want to merge into your documents is stored.

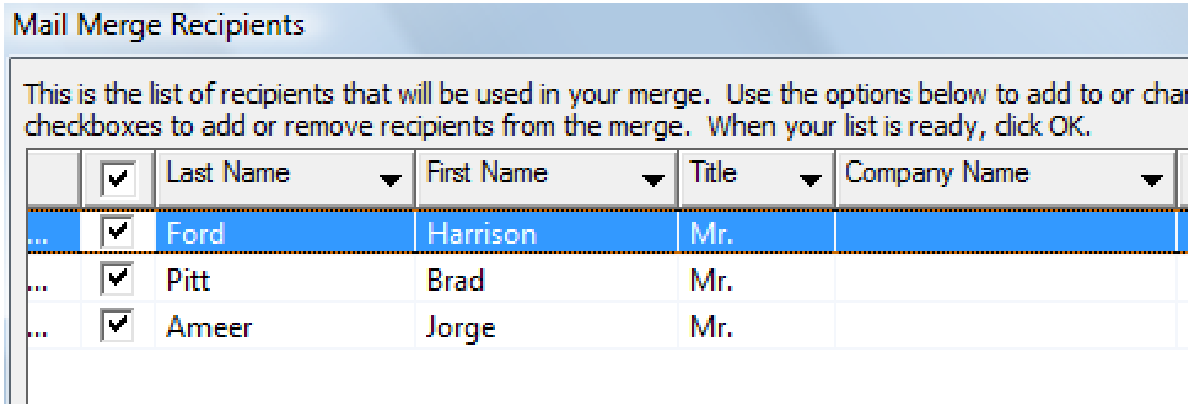
MAIL MERGE – CONNECT THE DOC TO A DATA SOURCE

- Existing lists for contacts could be located in Excel spreadsheets or Access databases and may be selected by choosing **Use an existing list**.
- If you have a contact list from Outlook, it can be imported for the mail merge process by typing **Select from Outlook Contacts**.
- If no contact list exists, you may create a new list by selecting **Type a new list**



MAIL MERGE – CONNECT THE DOC TO A DATA SOURCE

- Just because you connect to a certain data file doesn't mean that you have to merge information from all the records (rows) in that data file into your main document.
- After you connect to the data file that you want to use or create a new date file, the **Mail Merge Recipients** dialog box opens.
- You can select a subset of records for your mail merge by sorting or filtering the list



PRACTICE #7

1. Use Word Mail merge feature and either use **Median Merge Letter** template.
2. Create a new contact list, with five names (real or fictional) with city, state, zip, and phone numbers.
3. Save the contact list as **<u>MyContacts</u>** in your flash drive (you may also attempt to bring your outlook contacts if any).

MAIL MERGE – REFINE THE LIST OF RECIPIENTS OR ITEMS

- Click **Edit Recipient List** (either from the Mailing Ribbon or from the Wizard task pane). The Mail Merge Recipients dialog box will appear. Click **Next** when done.
- Some of the available options include:
  - **Sort records** Click the column heading of the item that you want to sort by.
  - **Filter records** This is useful if the list contains records that you know you don't want to see or include in the merge.

MAIL MERGE – ADDING MAIL MERGE FIELDS TO THE DOC

- After you connect your main document to a data file, you are ready to type the text of the document and add placeholders that indicate where the unique information will appear in each copy of the document.
- To make sure that Word can find a column in your data file that corresponds to every address or greeting element, you may need to map the mail merge fields in Word to the columns in your data file.

MAIL MERGE – ADDING MAIL MERGE FIELDS TO THE DOC

- To map the fields: click **Match Fields** in the **Write & Insert Fields** group of the **Mailings tab**.
  - The elements of an address and greeting are listed on the left. Column headings from your data file are listed on the right.
  - Word searches for the column that matches each element.

MAIL MERGE – ADDING MAIL MERGE FIELDS TO THE DOC

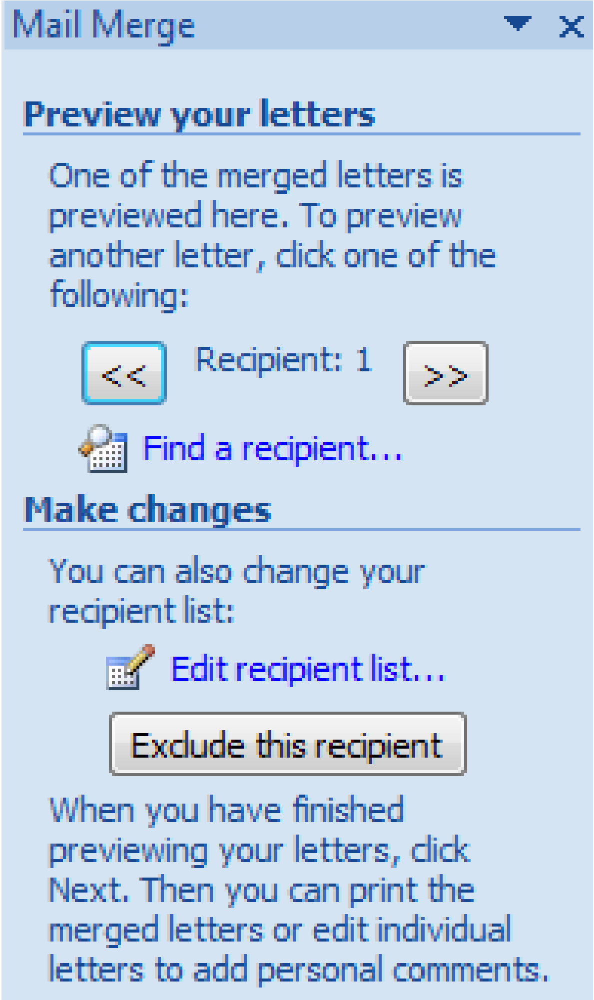
- In the list on the right, you can select the column from your data file that matches the element on the left.
- Your mail merge document doesn't need to use every field.
- If you add a field that does not contain data from your data file, it will appear in the merged document as an empty placeholder — usually a blank line or a hidden field.

MAIL MERGE – ADDING MAIL MERGE FIELDS TO THE DOC

- MM Fields are placeholders that you insert into the main document at locations where you want unique information to appear.
  - For example, you can click the **Greeting line** link in the task pane to add fields near the top of a new product letter, so that each recipient's letter contains a personalized greeting.
  - Fields appear in your document within chevrons, for example, **«AddressBlock»**.
- If your main document is still blank, type the information that will appear in each copy. Then, add fields by clicking the hyperlinks in the task pane. Click **<u>Next</u>** when finished adding all the fields.

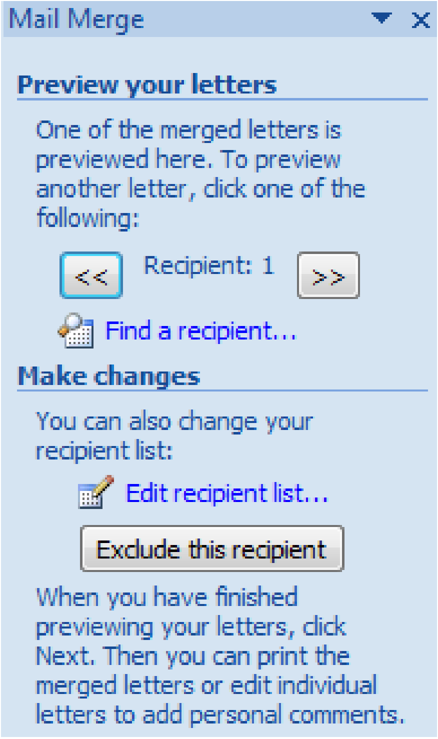
MAIL MERGE – PREVIEW AND MERGE

- To preview, do any of the following:
  1. Page through each merged document by using the next and previous buttons in the task pane.
  2. Preview a specific document by clicking **Find a recipient**.
  3. Click **Exclude this recipient** if you realize you don't want to include the record that you are looking at.



MAIL MERGE – PREVIEW AND MERGE

4. Click **Edit recipient list** to open the **Mail Merge Recipients** dialog box, where you can filter the list if you see records that you don't want to include.
5. Click **Previous** at the bottom of the task pane to go back a step or two if you need to make other changes.
6. When you are satisfied with the merge results, click **Next** at the bottom of the task pane.
7. What you do now depends on what type of document you're creating. If you are merging letters, you can print the letters or modify them individually. If you choose to modify the letters, Word saves them all to a single file, with one letter per page.



PRACTICE #8

1. Preview your merge
2. Click **Edit individual letters…** to proceed with the merge without printing them right away. Another document is created with each letter.
3. Edit and save your work as necessary.

MACROS

- You can automate tasks with a macro for those tasks you perform repeatedly in Microsoft Word.
- A macro is a series of commands that is stored in a Microsoft Visual Basic module and can be run whenever you need to perform the task.

RECORDING A MACRO

- Follow these steps:

1. On the **Developer tab**, click **Record Macro**.
2. In the **Macro name** box, enter a name for the macro.
   - **Note:**
     - The first character of the macro name must be a letter.
     - Other characters can be letters, numbers, or underscore characters.
     - Spaces are not allowed in a macro name; an underscore character works well as a word separator.
3. In the **Store macro in** box, click the location where you want to store the macro (all the documents based on the Normal template, or just the current document).

RECORDING A MACRO

4. If you want to include a description of the macro, type it in the **Description** box.
5. Optionally, you may assign the macro to a key stroke.
6. Click **OK**.
7. Record the actions you want for the macro, and then click **Stop Recording** button on the status bar.

RUNNING A MACRO

- Follow these steps:

1. Open the presentation that contains the macro you want to run.
2. On the **Developer tab**, in the **Code** group, click **<u>Macros</u>**.
3. In the **Macro name** box, click the name of the macro that you want to run, and then do one of the following:
   - If you want to run a macro in a presentation, click **Run**.
   - If you want to run a macro from a <u>Microsoft Visual Basic module</u>, click **Edit**, and then in <u>Microsoft Visual Basic Editor</u>, click **Run Sub/UserForm** on the <u>toolbar</u>.

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PRACTICE #9

1. Open **OriginalExcelLP**.
2. Record a Macro called **TeacherChangeAllFont**. The following actions should be recorded.
   - Highlight the entire document.
   - Change the font to **Garamond**
   - Change the font size of the title
   - Run Print preview
3. Go to the beginning of the document and run the macro.

SECURITY WITH MACROS

- Because macros can contain viruses, be careful about running them.
- Take the following precautions:
  - run up-to-date antivirus software on your computer
  - set your macro security level properly
  - use digital signatures
  - maintain a list of trusted publishers.

SECURITY WITH MACROS

- Follow these steps:

1. On the **Developer** tab, click **Macro Security**.
2. Under **Macro Settings**, decide how you want to handle Excel files that contain macros.
    - **Disable All Macros without Notification:** You can’t run macros, period.
    - **Disable All Macros with Notification:** When you open a file with macros, you see a security alert panel. It notifies you that macros have been disabled, but gives you the opportunity to enable them (Click the Enable Content button).
    - **Disable All Macros Except Digitally Signed Macros:** Only macros that have been certified with a digital signature can be run.
    - **Enable All Macros:** You can run any macros, period (very risky).
3. Click **OK** twice.

INTEGRATING MS-OFFICE

- **Opening and Displaying Multiple Software Simultaneously**

1. Open the **first** program.
2. **Minimize** the first program.
3. Open the **second** program.
4. **Maximize** the first program.
5. **Right-click** on the taskbar away from the minimized versions of the first and second program. A pop-up menu appears.
6. Click **Tile Windows Vertically** on the pop-up menu. You should now see the two programs displayed on screen side by side.

INTEGRATING MS-OFFICE

- ***Embedding vs. Dynamic Linking***
  - The advantage of **embedding** in this case is that your Excel data will be *physically* stored in your Word document.
  - Thus, you can use that document in a computer that doesn't have Excel installed.
  - However, it takes more disk space, since it has to save the spreadsheet data within the Word document.

INTEGRATING MS-OFFICE

- ***Embedding vs. Dynamic Linking***
  - On the other hand, the advantage of a **dynamic link** in this case is that when you change your data in Microsoft Excel, it will automatically change the Excel data in your Word document.
  - Your Word document only possesses a link to the data; this data physically resides in an Excel spreadsheet file.
  - Therefore, your Word document will take less disk space as opposed to using the embedding technique.
  - The downside is that if you want to use the document in another computer, that computer MUST have Microsoft Excel.

INTEGRATING MS-OFFICE

- ***Embedding a Chart from Excel into Word***
  1. In MS Excel, move your mouse pointer over the chart until you see the words **Chart Area** displayed on a small box.
  2. Click the mouse on that spot.
  3. In Excel's **Home** tab, click <u>**Copy**</u>.
  4. Switch to Microsoft Word and select the insertion point where you want to paste the chart.
  5. In Word's **Home** tab, click <u>**Paste**</u> and then click <u>**Paste Special**</u>.
  6. Select **Microsoft Office 2007 Excel Chart Object**.
  7. Select **Paste**.
  8. Click <u>**OK**</u>.

PRACTICE #10

1. Use the column chart located in **NJIT Practice 1** and embed the chart after discussing the point about teaching students about creating and enhancing charts.
2. Save your document as **UsingEmbeddedChart**.

INTEGRATING MS-OFFICE

- ***Creating a Dynamic Link between Excel and Word***

1. In Microsoft Excel, move your mouse pointer over the chart until you see the words **Chart Area** displayed on a small box.
2. Click the mouse on that spot.
3. In Excel's **Home** tab, click **<u>Copy</u>**.
4. Switch to Microsoft Word and select the insertion point, where you want to paste the chart.
5. In Word's **Home** tab, click **<u>Paste</u>** and then click **<u>Paste Special</u>**.
6. Select **<u>Microsoft Office Excel 2007 Chart Object</u>**.
7. Select **<u>Paste Link</u>**.
8. Click **<u>OK</u>**.

PRACTICE #11

1. Use the line chart located in **NJIT Practice 1** and dynamically the chart after discussing the point about embedding and linking charts.
2. Save your document as **UsingDLinkedChart**.

INTEGRATING MS-OFFICE

- **Using Spreadsheets In PowerPoint**
  - This allows you to display spreadsheets created in MS-Excel in your PowerPoint slides and edit them during your presentation.

1. Do the steps for dynamic linking. However, you will be linking this time an Excel worksheet with PowerPoint.
2. After the worksheet has been pasted to the slide in PowerPoint, select it.
3. Right-click on the worksheet.
4. In PowerPoint's **Insert** tab (**Links** group) click <u>**Action**</u>.
5. Under Mouse-Click tab, select <u>**Object Action**</u>.
6. Select <u>**Edit**</u> from the drop down list.
7. Click <u>**OK**</u>.

PRACTICE #12

1. Open the PowerPoint presentation called **NJIT Presentation 1**.
2. Add a new slide with the **Title and Text** layout. Its title should be **Excel Tips**
3. Use the Worksheet from **NJIT Practice 1** and put it in the new slide.
4. Run the presentation and click on the worksheet and see what happens.