- **Pattern.** The Pattern pop-up menu offers a long list of choices, from Clear (no pattern), to a series of percentages of *halftone* shading (like newspaper photographs), to line patterns such as diagonal stripes. Most of the time, you're probably best off leaving this pop-up menu alone; use the "Fill color" control instead for a professional, even tint.

Tip: If you choose "Solid (100%)" from this pop-up menu, you get solid black behind your text. Ordinarily, your text would therefore disappear completely, but Word thoughtfully makes the text white, producing an effect called *reversed type*, like this.

- **Pattern Color.** If you decide to choose a pattern, the "Pattern color" pop-up menu becomes active. The color you choose here becomes the "black" color of the pattern you chose from the Pattern pop-up menu.
- **Fill** is the color behind text. You can choose from 40 colors and 24 grayscale shades. The color appears behind the selected text or current paragraph and under any pattern you've chosen.

Note: There's a difference between choosing No Fill and White fill color. No Fill is transparent; when you layer a picture beneath text with no fill, you can see the picture. When you layer something beneath text with white fill, on the other hand, the fill blocks out whatever's below.

You can combine these options in fascinating and grisly ways. For example, any pattern you choose overlies the fill color of your paragraph, even if that's No Fill, in which case all you see beneath the pattern is the color of the paper. When you choose one of the percentage shadings from the Pattern pop-up menu, you're choosing a percentage of black or color to overlie the fill color.

Extra features in the Borders and Shading dialog box

A few extra features are only available in the Format→Borders and Shading dialog box. For example:

- You can control how far the fill extends beyond the text. For example, after choosing a fill color, choose Format→Borders and Shading→Borders tab. You'll notice that the None border setting is chosen. However, you can now click the Options button and adjust the "From text" settings as described on page 151. The settings will apply to the boundary of the fill, as if it were an invisible border.
- Also in the Borders and Shading dialog box, the Horizontal Line button opens a "Choose a Picture" dialog box showing the decorative horizontal lines in Word's clip-art gallery. Select one and click Insert to place the line across the text at the insertion point. (You can't make borders with these lines, just horizontals.)

Document Formatting

When you start with a blank document, Word gives you a one-inch margin at the top and bottom of the page, and a stately one-and-a-quarter inch margin at each side.

Most people never change these settings; in its own, almost accidental way, Microsoft has dictated the standard margin formatting for the world's business correspondence. But if you learn how to work with margins—as well as paragraphs and indentation—you can give your document a distinctive look and fit much more writing on a page.

Margins

You can adjust the margins of a Word document in either of two ways: by entering exact measurements (in the Formatting Palette or the Document dialog box), or by dragging the margins directly on the ruler.

To use the numeric option, choose Format→Document→Margins tab, or click the triangle next to Document on the Formatting Palette. There you'll find individual boxes that let you specify, in inches, the size of the left, right, top, and bottom margins.

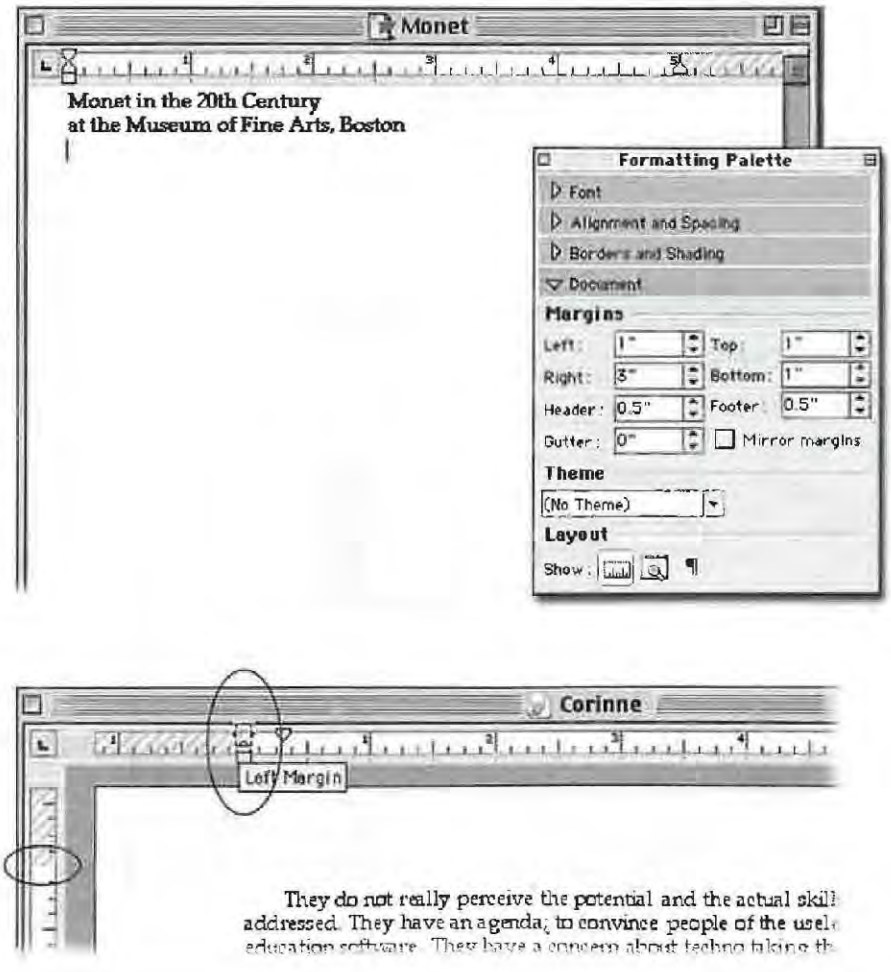


Figure 3-13:
Top: The house-shaped controls set indents (see page 114). If you forget what they're for, point to them without clicking to get the pop-up tooltip labels. The line where the color of the ruler changes from white to striped indicates the margin limits.

On the Formatting Palette: The margin settings that resulted in the ruler shown.

Bottom: You can drag the gray/white boundaries (circled) to adjust the top, bottom, or side margins.

To set your margins by dragging, which gratifies you with immediate visible feedback, you must be in Page Layout view. (Choose View→Page Layout.)

- **Left, Right, Top, Bottom.** To set margins by dragging, point to the line where the ruler changes from white to striped, without clicking; the striped area is *outside* the limits of the margin. When the cursor changes to a box with double arrows, you can drag the margin line to any point on the ruler you wish (see Figure 3-13). You can change margins on both the horizontal and vertical rulers in this way.

Tip: You may find it extremely hard to adjust the left margin, because the trio of *indent* markers (Figure 3-7) lie directly on top of the gray/white boundary. Let the cursor hover until the Left Margin tooltip appears and the cursor shape changes as shown in Figure 3-13. You may even find it worth moving the first-line indent handle out of the way while you adjust the margin.

- **Header and Footer.** Headers and footers (see page 179) appear *within* the normal margins. For instance, if you've set the bottom margin for 1", you can have the page number (footer) appear a half-inch from the edge of the paper—half an inch below the bottom of the text. To do so, set the Footer margin for 0.5", as shown in Figure 3-13.

Tip: When you've got your margins just the way you want them, you can make that the default for all new documents you open; just choose Format→Document and click the Default button at the lower left of the Document dialog box.

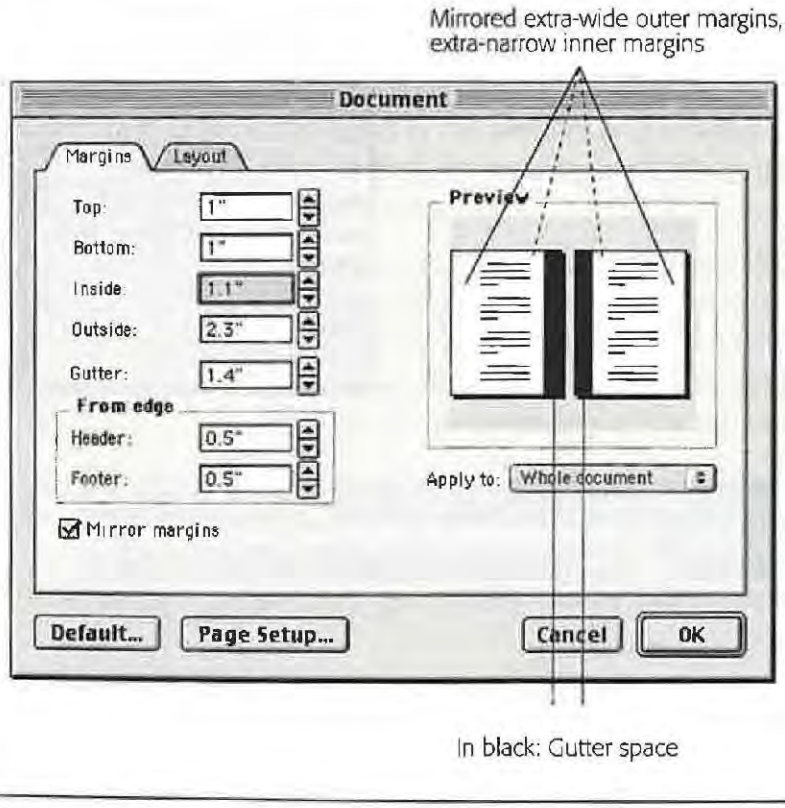


Figure 3-14:
A quick way to open this dialog box is to double-click anywhere on the ruler along the top and left side of the page. The gutter is extra area for binding; the Mirror Margins feature is handy when you want the outer and inner margins to be uneven.

Gutters and Mirrors

Word's *gutter* and *mirror* margin features make margins work when your document is destined to be bound like a book.

In an open book, the *gutter* is the inner margins where the pages attach to the spine. Usually, the gutters have to be wider than the outer margins to allow room for the binding and the spine. (You may want to talk your publisher—the fine people at Kinko's, for example—to find out about the margin requirements.) Word can add this extra space automatically. For instance, if you set a gutter space of 0.25", Word will *add* a quarter-inch to the gutter margin on each page.

Another useful tool for book margins is the *mirror margin* feature, which is designed to let you set up margins that are uneven on each *page,* but reflected on each two-page *spread* (see Figure 3-14).

Section Formatting

The Formatting Palette doesn't say anything about Section formatting; in fact, most people have never even heard of it.

Still, section formatting is important in a few special circumstances:

- Sections allow you to divide a document into chapters, each with its own headers or footers.
- Sections let you change from, say, a one-column format for your opening paragraph to a three-column format for the body of the article, or to insert a landscape-orientation page or two into a paper that's primarily in portrait orientation.
- Sections give you flexibility in printing; you can print your title page on colored paper from a different paper tray on your printer, for example.
- You can give each section of your document different margins; you might capitalize on this feature when, for example, your training manual contains multiple-choice quizzes for which you could really use narrower page margins.

The bottom line: A section is a set of pages in your document that can have its own independent settings for page numbering, lines, footnotes, and endnotes. It can have its own layout features such as page borders, margins, columns, alignment, text orientation, and even page size. Finally, it can have its own printer settings such as orientation and paper source.

Inserting and Removing Section Breaks

To start a new section, choose Insert→Break, and choose one of the Section Break *types,* depending upon where you want the new section to begin, relative to the current page. For instance, to change the number of columns in the middle of a page, choose Section Break (Continuous); to start the next chapter on a new page, choose Section Break (Next Page). If you're self-publishing a novel, remember that new chapters usually begin on a right-hand page; choose Section Break (Odd Page).

You'll see the change reflected right away; in Normal view, a section break shows up as two finely dotted lines labeled "Section Break (Next Page)" or whatever kind you inserted (see Figure 3-15). In Page Layout view, you see only the *effect* of the page break—if you chose the "Next Page" type, your text abruptly stops in the middle of one page and picks up again on the next. But if you click the Show/Hide (¶) button on the Standard toolbar, you'll see the breaks as double dotted lines, just as in Normal view.

Choosing a section type may sound like a big commitment, but don't fret: you can always go back and change it. To do so, click anywhere in the section that you want to *change*—that is, just after the section break itself—and then choose Format→Document→Layout tab. Choose a new section type from the "Section start" menu. (This menu gives you an additional choice of section break: New column, which is useful solely if you're designing your document with multiple columns, as described on page 140. To make an existing column start at the top of the page, click it and choose "New column.")

To remove a section break, just click its double dotted line and press Delete.



Figure 3-15:
Top: Create a section break by choosing from the Insert menu (there's no dialog box for it).

Bottom: An example of a "Next page" section break, shown here separating the table of contents from the text, and a "Continuous" section break to separate one-column and two-column parts of a page.

Caution: When you delete a section break, or the last paragraph marker in a section (click ¶ to see it), you also delete its formatting. The section *before* the break will take on the formatting of the section *after* it. The sudden appearance of, for example, 24 pages of a two-column layout can be disconcerting, to the say the least, if you're not prepared for it.

Formatting within Sections

To change formatting or other settings within a section, such as page numbering or headers and footers, just click in the section and use the commands in Word's dialog boxes and toolbars. Settings like margins, alignment, columns, and page orientation, plus any feature involving numbering, such as page and line numbering, headers and footers, and so on, operate independently of the other sections in the document.

Page numbering across sections

When you use a header or footer and page numbers in your document, you can either restart numbering at the beginning of each section—or number the document continuously from beginning to end. For example, suppose you've written a term paper with an introduction in its own section, which you want to number with roman numerals. (You want regular Arabic numerals for the body of the paper.) Here's how you'd set things up:

1. **Click at the end of the introduction and choose Insert→Break→Section Break (Next Page).**

   The double dotted lines appear, if you're in Normal view.

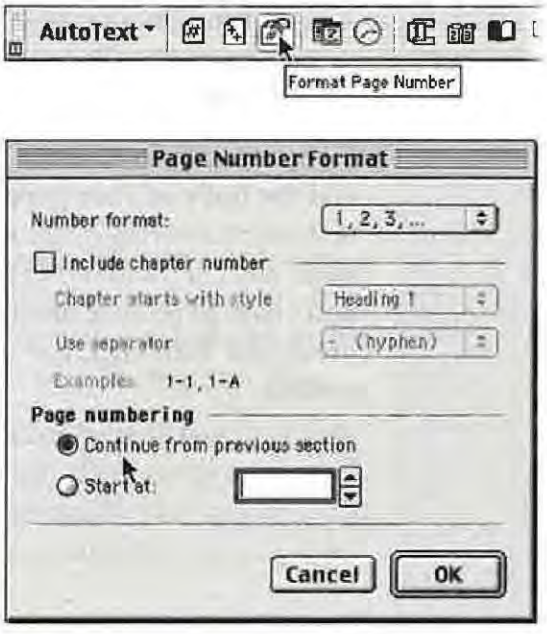


Figure 3-16:
Top: The Header and Footer toolbar.

Bottom: Clicking the "Continue from previous section" radio button carries over the page numbering from the section before. You can start a section at any page number you choose by clicking "Start at" and entering a number in the box.

2. **Click anywhere in the introduction (*above* the section break) and choose View→Header and Footer.**

   The header and footer areas of your page appear, as described on page 179. The Headers and Footers toolbar opens, too.

3. **Scroll down to the footer on one of the pages in the introduction.**

   The footer is labeled "Footer – Section 1."

4. **On the Headers and Footers toolbar, click Insert Page Number (the # icon), then click the Format Page Number icon (shown in Figure 3-16).**

   The Page Number Format dialog box opens, also as shown in Figure 3-16.

5. **Choose "i, ii, iii..." from the "Number format" pop-up menu; click the "Start at" radio button. Click OK.**

   The number i appears in the box, which is right where you want the numbering for the introduction to begin.

6. **Click in one of the footers in the second section (*after* the section break). Click the "Same as Previous" icon on the Headers and Footers toolbar, so that it is no longer highlighted.**

   This button is about halfway across the toolbar; use the tooltip balloons to find it (point to each icon without clicking).

7. **Again on the toolbar, click Insert Page Number, then click Format Page Number.**

   Again, the Page Number Format dialog box appears.

8. **This time, choose the Arabic numerals (1, 2, 3, ...) from the "Number format" pop-up menu. Click the "Start at" radio button; make sure 1 appears in the box. Click OK.**

Now, no matter how you add material to, or remove material from, the introduction and the body of your paper, the introduction will be numbered started on page i, and the numbering of the main body will start over with 1. Should you change your mind and decide to number your paper consecutively from the intro to the end, you don't have to remove the section break. Just click one of the footers *after* the section break and then click the "Same as Previous" button on the Headers and Footers toolbar.

CHAPTER
4

Styles, Page Layout, and Tables

Once you've polished the *content* of your document, it's time to work on the packaging. Word can take you well into the realm of page design and layout.

For example, an endless block of text running across the page is fine, but columns are sometimes easier to read—and they look more professional. Or perhaps you'd like to add some well-placed borders, but you've never been sure how to work with them.

This chapter builds upon the formatting concepts in Chapter 3 and describes how to add the finishing touches that give your document polish and flair.

Styles

When you create Word documents, you usually use a small assortment of formatting styles. And you'll use them over and over again throughout the document. In a short piece, reformatting your chapter titles (for example) is no big deal; just highlight each and then use the Formatting Palette to make it look the way you like.

But what about long documents? What if your document contains 49 chapter headings, plus 294 sidebar boxes, captions, long quotations, and other heavily formatted elements? In such documents—this book, for example—manually reformatting each heading, subhead, sidebar, and caption would drive you to distraction. Word's *styles* feature can alleviate the pain.

A style is a prepackaged collection of formatting attributes that you can apply and reapply with a click of the mouse. You can create as many styles as you need: chapter

headings, sidebar styles, whatever. You end up with a collection of custom-tailored styles for each of the repeating elements of your document. Figure 4-1 should make all of this clearer.

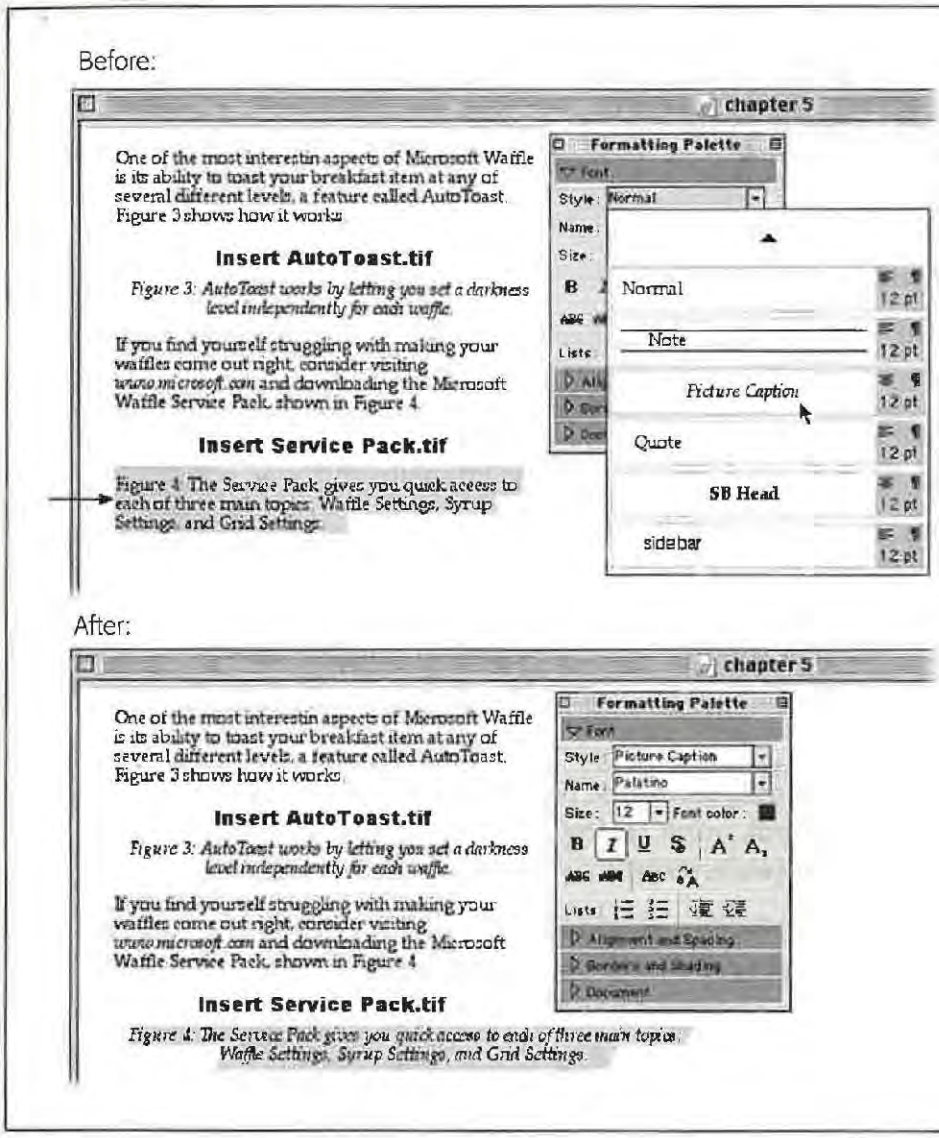


Figure 4-1:
Top: As you prepare to format this caption (shown by the arrow), you don't have to try to remember how you formatted a picture caption the last time you used one. Instead, choose Picture Caption (or whatever you named the appropriate style) from the Style pop-up menu.

Bottom: Word does the remembering, and the formatting, for you.

Once you've created your styles, you can apply them as you need them; they'll be consistent throughout the document. During the editing process, if you notice you accidentally styled, say, a *headline* using the *Subhead* style, you can fix the problem by simply reapplying the correct style.

You'll appreciate styles even more when it comes time to *change* the formatting of a particular style. If you change a style's description, Word offers to change *every occurrence* of that style in your document.

Styles aren't one of Microsoft's masterpieces when it comes to ease of understanding. But grasping how they work, where they're stored, and when they change helps to explain many of Word's idiosyncrasies, and pays off handsomely in the long run.

Where Styles are Stored

Every document has a collection of ready-to-use, built-in styles, whether you're aware of it or not. (To be more precise, every document is based on a *template* that stores a canned set of styles, as described on page 188.) Word opens each new blank document with the *Normal* paragraph style preselected.

The styles in your document are listed in several places: in the Font panel of the Formatting Palette, the Formatting toolbar, the Ruler toolbar, and the Format→Style dialog box (see Figure 4-2).

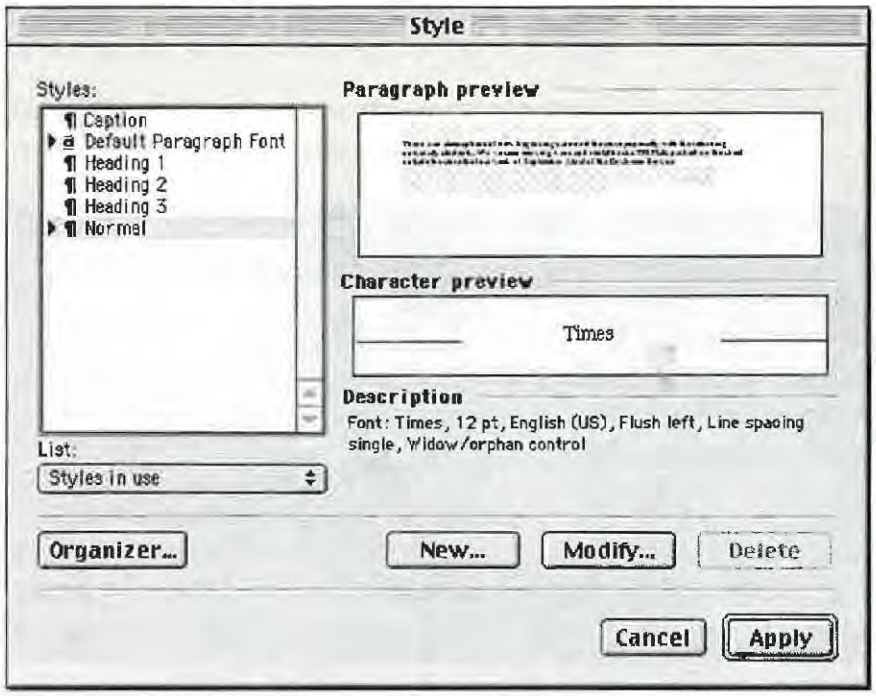


Figure 4-2: *Choose Format→Style to see the styles available in your document. Every document comes with a few heading styles, such as the Normal style and Heading 1, because the Normal* template *has these starter styles built right in. (See page 188 for more on templates.) Starting from a different template might give you a different set of starter styles.*

Applying Styles

To apply a canned style to some text you've already typed, highlight the text. For example, drag through some text, or click once inside a paragraph to select it. (You can also choose a style for a new paragraph *before* you begin typing it.)

Now choose a style from one of Word's style boxes, using one of the following methods (listed in ascending order of speed):

- Press ⌘-Shift-S to highlight the Style list in the Formatting Palette. Use the up and down arrow keys to step through the styles in the list until the one you're looking for is highlighted. Press Return to apply the style.

Tip: You can save time by typing the first few letters of the style before using the down arrow key; you'll jump directly to the appropriate spot in the alphabetical list.

For this very reason, some people use very short style names when they format a style. For instance, if you name a style CX, you have only to press ⌘-Shift-S, type *gx* and Return to apply the style, never having touched the mouse. Better yet, give the style *two* names, separated by a comma—one in English for your own reference in using the Style menus, the other its "keystroke name." For example, your Sidebar style might be called *Sidebar, sb.*

- Click the arrow button next to the Style list in the Formatting Palette, then drag the mouse to highlight the desired style (see Figure 4-1). Click the style name to apply it.
- Choose Format→Style; double-click one of the style names in the Styles list box (see Figure 4-2)—or click the style name once, then click Apply.

GEM IN THE ROUGH

WYSIWYG Styles

As you may have noticed, the Formatting Palette's Style pop-up menu shows the names of the styles in their actual fonts, sizes, and colors; even paragraph borders show up around the relevant style names.

You can open the Style list faster if you *don't* use this WYSIWYG feature. To turn it off, choose Edit→Preferences→General tab and turn off "WYSIWYG font and style menus," then click OK; now all of the styles listed in the Formatting Palette appear in a demure 9-point Geneva.

Of course, this also turns off the WYSIWYG *font* menus; you can't turn them off independently. (You can still summon a WYSIWYG font display on a case-by-case basis by pressing Shift before you open the menu, but that trick doesn't work for the Style menu.)

Creating Styles by Example

There are two ways to go about creating your own styles. You can use the Styles dialog box to build one from scratch. Or you can "create by example"—that is, you can format the text in the document the way you want it, and then tell Word to memorize that formatting. The second method is usually easier.

For example, suppose you want to create a style for illustration captions. Start by typing out the caption, ending with Return to create a paragraph.

1. **Select the paragraph (by clicking inside it, for example).**

   Now use the formatting controls to make it look exactly like you want it:

2. **Using the Formatting Palette or Format menu, choose the Palatino font, at 10-point size, italic, centered, indented on both sides.**

   Chapter 3 offers details on using these controls.

3. Click in the Style box on the Formatting Palette (or press ⌘-Shift-S) to highlight it. Type the new style name (*Picture Caption*, for example), and press Return.

   To make it quicker to apply this style in the future, consider giving it two names separated by a comma—the second one can be an abbreviation (see the Tip above).

That's it; your style is ready for use.

Creating Styles in the Dialog Box

For more control over what Word associates with a style, you can use the Styles dialog box, shown in Figure 4-2. To use it, choose Format→Style; click New (or press ⌘-N). The New Style dialog box opens, as shown in Figure 4-3.

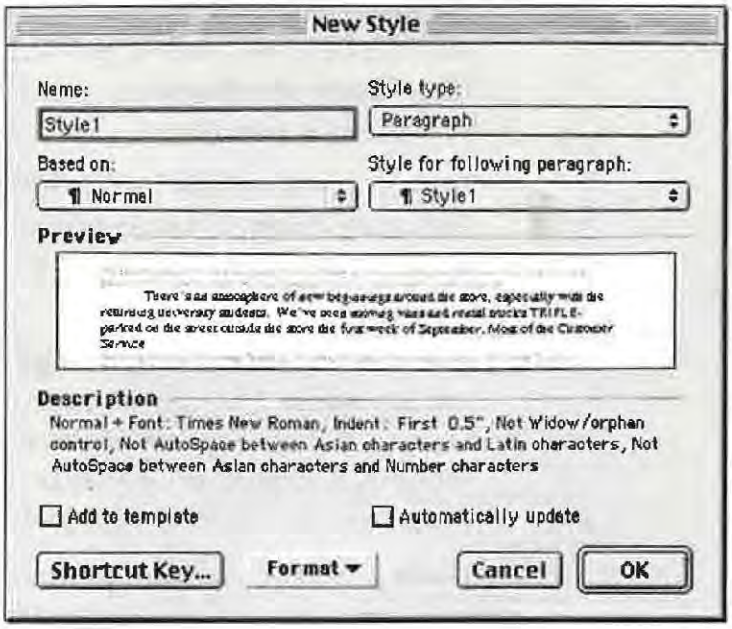


Figure 4-3:
As you develop your new style, the Description in the middle of the New Style dialog box will change to show a written definition of the style.

Use the various controls here to define this new style:

- **Name.** Give your style a name that pertains to how you're planning to use it: Headline, Sidebar, and so on.
- **Based on.** Choose Normal or whatever existing style is closest to what you have in mind for the new style. Basing your new style on an existing one has two payoffs: First, you save time, because some of the formatting is already in place. Second, when you modify the underlying style (such as Normal), all styles *based* upon it change as well, which keeps your document design coordinated. For example, if you base a heading on the Normal style, and then change the Normal font to Palatino, the heading style's font changes to Palatino as well.

- **Style for following paragraph** is a big time-saver. Let's say the new style you're creating is a heading, and after each heading, you always go back to typing in Normal style. Instead of having to manually change the font back to Normal after each use of the Heading style, you can choose Normal here. Now, whenever you press Return after using the heading style, the font automatically returns to Normal.
- If you chose *Paragraph* in the **Style type** menu at upper right, the style will include the current settings for indents, tabs, and other aspects of paragraph formatting (as described in Chapter 3). If you choose *Character* formatting, then Word memorizes only the font and other type characteristics of your new style. You can apply a character-formatting style in a paragraph independently of the paragraph style.
- Turning on **Add to template** stores your new style to the *template* on which your document is based (see page 188). All new documents based on this template will offer this style, too, ready to go. (To find out which template you're using, choose File→Properties→Summary tab. The name of the template is shown near the bottom of the dialog box.)
- Turn on **Automatically update** with caution. If this box is turned on, then any formatting change you make to any *one* occurrence of text in this style will change the style's definition—and with it, *every* occurrence of the style in your document.
- **Shortcut Key** opens the Customize Keyboard dialog box (see page 581), where you can assign a keyboard shortcut to this style. For example, you can assign Control-⌘-Z to your favorite heading style and apply it with a quick tap of the left hand. If you frequently change styles as you type along, or if you have trouble using a mouse, this feature is a godsend.

By clicking the **Format** pop-up menu (or pressing ⌘-O), you gain access to the dialog boxes where you do the actual formatting of the style you're building:

- **Font** opens the Font dialog box, described on page 99.
- **Paragraph** opens the Paragraph dialog box, described on page 109.
- **Tabs** opens the Tabs dialog box, described on page 115.
- **Border** opens the Borders tab of the Borders and Shading dialog box (page 119).
- **Language** lets you associate a foreign language with your style, for the benefit of the spelling checker and other proofing tools (page 77).
- Placing a **Frame** around a paragraph gives it some of the qualities of text boxes. See "Workaround Workshop" on page 152 for more detail on the differences between text frames and text boxes.
- **Numbering** opens the Bullets and Numbering dialog box, which is described on page 106. The menu option's name, "Numbering," is only half accurate, because you use it for bulleted lists as well as numbered ones.

When you click OK after making changes in any of these formatting dialog boxes, you return to the New Style dialog box, where the Description information lets you know what characteristics you've assigned to this style.

When you click OK again to return to your document, the newly created style's name appears along with all the others in the Formatting Palette; it's ready to apply.

Changing, Deleting, or Copying Styles

There are several ways to change an existing style, listed here in order of speed:

- Select some text in your document and make the desired changes to it. Then choose the style's name in the Formatting Palette and press Return.

  The Modify Style dialog box opens, as shown in Figure 4-4; click OK to update the style, and with it every occurrence of text in that style. (Use the Reapply option if you've made a mess of a certain paragraph, and you want to restore it to its virginal, true-to-its-style condition.)

- Choose Format→Style, click the style's name in the Styles box, click Modify (or press ⌘-M), and use the Format menu to make changes as described above to the font, paragraph, and so on, just as if creating a new style.

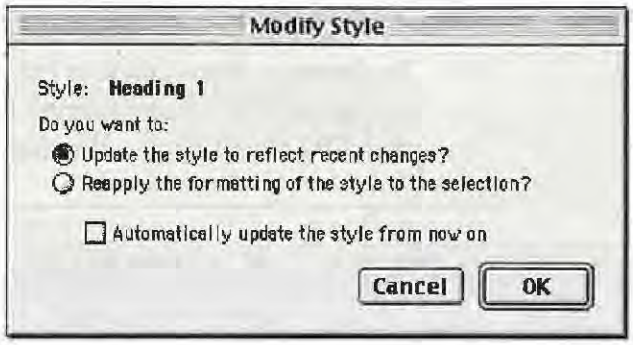


Figure 4-4:
Turning on "Automatically update the style from now on" has the same effect as the "Automatically update" box in the Style dialog box (see the facing page). It also means that you can change the style in the future without seeing this message again.

Deleting styles

To delete superfluous styles, choose Format→Style, then click the style in the Styles list box and click Delete.

Note: Word won't let you delete the Normal style or Word's built-in heading styles (Heading 1, 2, and 3). If you click one of these styles, the Delete button is grayed out.

To delete many styles at once, choose Format→Style and click Organizer (or press ⌘-O). The Organizer opens, as shown on page 192. In the list box for the current document, ⌘-click the styles you want to delete, then click Delete. (If the list of styles you wish to delete are consecutive, click the first one, then Shift-click the last style name; click Delete.)

Transferring styles

Once you've cultivated a crop of magnificent styles, you may well wish you could spread their sunshine to other documents. You can do so in the Organizer dialog box, described in the previous paragraph and on page 192, but that's a lot of trouble.

The sneaky, much faster way is to *copy* some paragraphs (formatted with the styles you want to transfer) and paste them into another document. Word automatically adds the pasted styles to the second document's list of styles. (If the document already contains a style of the same name, it ignores the new one you've pasted.)

Tip: If you ever get confused about which styles you've applied where, try this: Choose Edit→Preferences→View tab. Set the "Style area width" to about one inch, then click OK. Now Word opens a new strip at the left side of your document window that identifies the style of every paragraph!

Themes

As Chapter 3 makes clear, you could spend all day tinkering with fonts, colors, borders, and bullets. You may not have that kind of time. Or you may not yet have much confidence in your graphic design ability. If this sounds like you, then Word's built-in *themes* are worth a look; they're predefined sets of character and heading styles, colors, lines, backgrounds, bullet styles, and so on.

To choose a theme, choose Format→Theme. The Theme box at the upper left lists 66 themes (No Theme doesn't count). If you're really in a hurry, select a theme and click OK; Word applies the theme immediately to the current document.

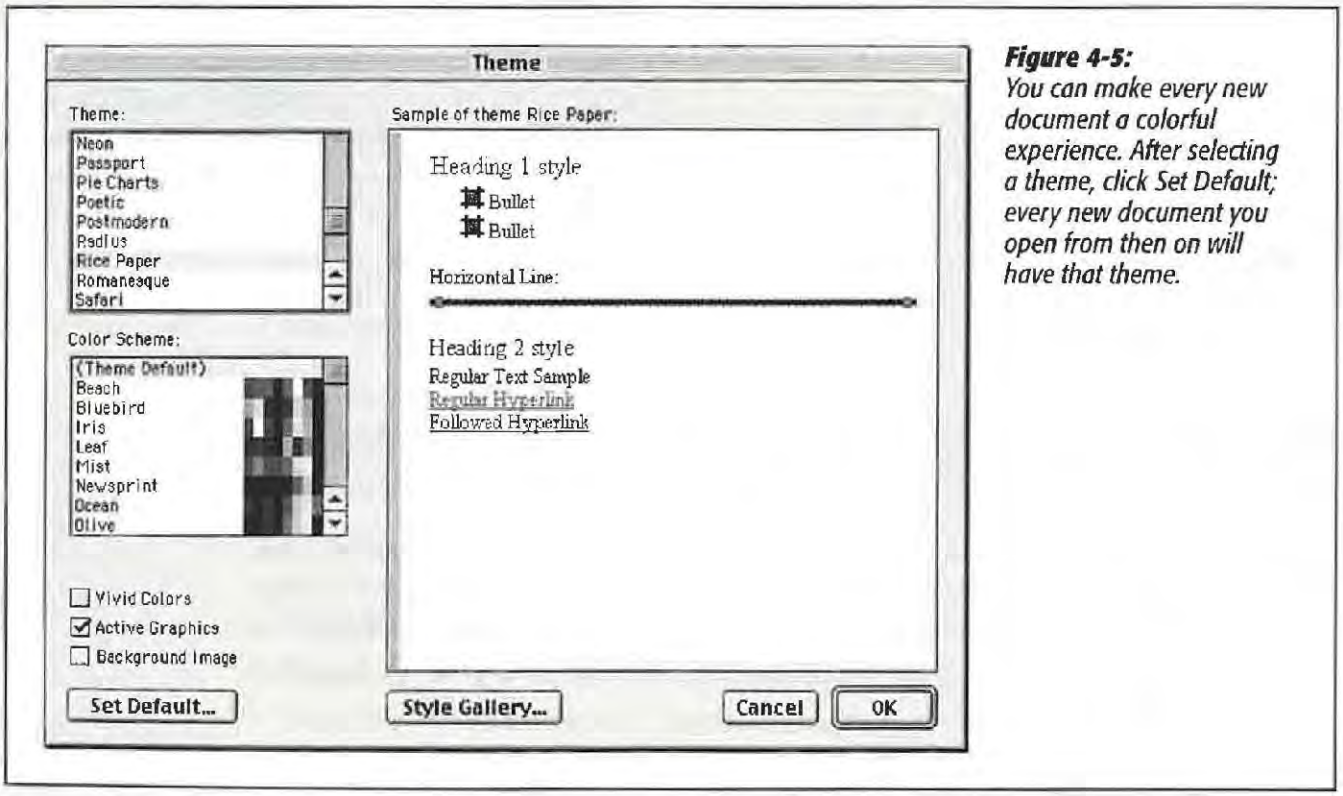


Figure 4-5: *You can make every new document a colorful experience. After selecting a theme, click Set Default; every new document you open from then on will have that theme.*

When you have more time, here are more things you can do with themes:

- Choose a different color scheme. Each theme has a default scheme, but you can substitute any of the 21 other color groupings listed in the **Color Scheme** box. Watch what happens in the Sample box (see Figure 4-5) until you find the colors that grab you.
- Once you've chosen a theme, check the **Vivid Colors** box and watch what happens to the colors. This is a good option to consider if you're creating a Web page (see Chapter 7); the background in particular changes to a brighter color. On the other hand, if your Web page contains lots of text, bear in mind that a dark or bright background can make it hard to read.
- Turning on **Active Graphics** *animates* the bullets and borders on the screen. Animated graphics blink, alternate between two different colors, or otherwise scream for your reader's attention. To get the full effect, choose File→Web Page Preview; your Web browser opens automatically and displays your document as though it's a Web page. (If you're not planning to use your document on the Web, keep this box checked anyway; it gives the graphics their proper look on the page.)
- The **Background Image** checkbox turns on (or off) the default background pattern for each theme. These backgrounds are intended for when a document will be turned into a Web page (see page 277). If you find it detracts from your text, or prefer a plain background, turn it off.
- Finally, after you apply the theme and return to your document, you can tailor it to your liking. Just use the Formatting Palette and Word's other tools to change the background color, border style, and so on.

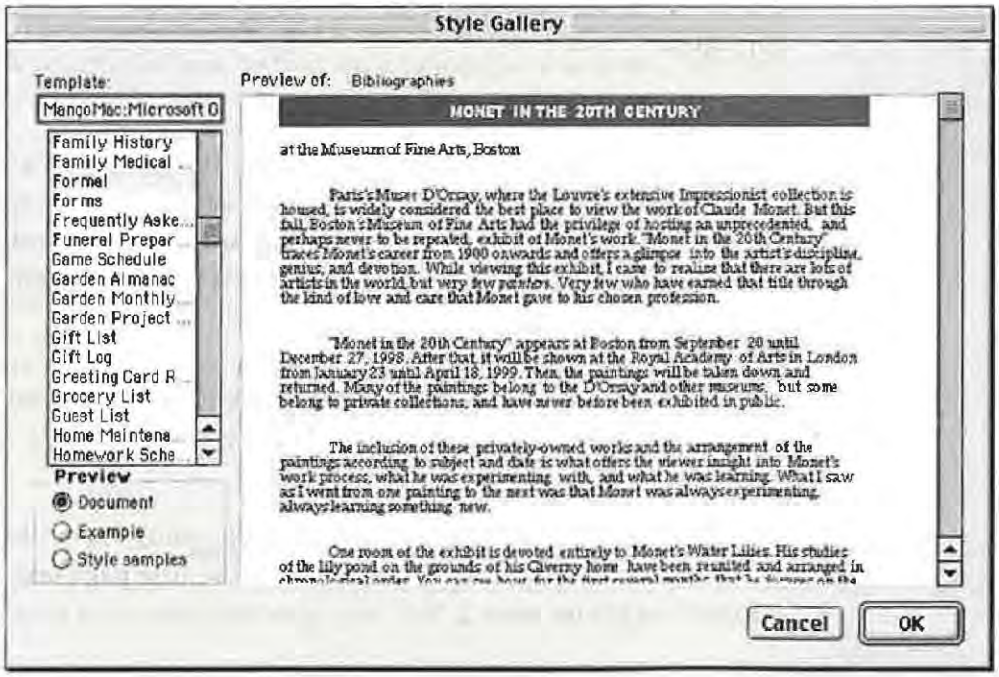


Figure 4-6: *The list at the left shows all Word's preinstalled templates as well as any you've created yourself and stored in the Microsoft Office 2001→ Templates folder. If you've stored templates somewhere else, you can enter the path in the box at upper left.*

Style Gallery

The Style Gallery button in the Theme dialog box (see Figure 4-6) opens a window that offers another look at the templates listed in the Project Gallery (see page 14).

As shown in Figure 4-6, the preview window (eventually) shows how your document will look in the selected template. (You might not notice much difference unless you've used styles, especially Word's built-in Heading styles, in the document.) It's a good thing, too, because not all the templates work very well with all documents. For instance, if your document has lots of text, the Comic Sans font and pastel-colored headings of the Corners theme may make your words hard to read.

If you find one you like, click OK. As always, you can adjust the formatting once you've returned to your document.

Page Layout

Word automatically flows text from line to line and page to page. However, an important part of document design is being able place text right where you want it, break it up, and in other ways control the flow.

Inserting Breaks

A *break* is an invisible barrier that makes your text stop, only to start again on a new line, column, or page.

Paragraph break

In Word, pressing Return (or Enter) creates a paragraph break; although you may not have been aware of the term, this is what you've been creating day in and day out every time you end a paragraph. Unless you've chosen a different "following paragraph" style (see page 134), the new paragraph takes on the same formatting as the one above.

Line break

Pressing Shift-Return inserts a *line break.* It's similar to a paragraph break except that the text on the new line remains part of the original paragraph, and retains its style and paragraph formatting. No matter how you edit the surrounding text, the line break will remain where you inserted it until you remove it.

Page break

Choose Insert→Break→Page Break (or press Shift-*Enter)* to force a *hard* page break. No matter how much text you add above the break, the text *after* the break will always appear at the top of a new page.

You'd use a page break when, for example, your report has a separate title page. Inserting a hard page break at the end of the title page text forces the body of your paper to begin on page 2. You may also want to start a new page for each topic in a

document, if you're writing a manual on chores for the kids, for example. You could start a new page for the cleaning instructions for each room in the house.

Tip: In Page Layout view, page breaks are generally invisible. The text just ends in the middle of a page and won't go any further, which can be disconcerting if you've forgotten about having added a page break.

Choose View→Normal, or click the Show/Hide ¶ button on the Standard toolbar or Formatting Palette, to see the dotted lines that represent a page break.

Column break

To make text at a certain spot jump to the top of a new *column* (in multicolumn layouts like those described in the next section), choose Insert→Break→Column Break. Word ends the current column and, when you start typing again, begins at the top of the next column at the top of the page.

If you choose this option when you're not using multiple columns (see page 140), it behaves like a hard page break. (On the other hand, if you later switch to a two- or three-column format, the column break behaves like a normal column break. If you plan to make two different versions of your document, one with columns and one without, you may therefore want to use column breaks instead of page breaks.) *Keyboard shortcut:* ⌘-Shift-Return.

Section break

A *section* is like a chapter—a part of a document that can have formatting independent of the other parts. For instance, you can give each section different margins, page numbering, pagination, headers and footers, even paper size for printing. See page 125 for more detail on sections.

To begin a new section, insert a section break by choosing Insert→Break→Section Break. You can choose to begin the new section on a new page or in place (see page 125).

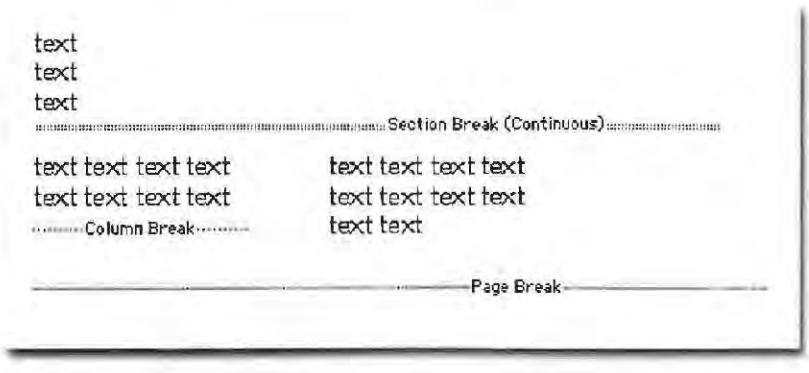


Figure 4-7:
Click the ¶ (Show/Hide) on the Standard Toolbar to see what kind of breaks are where in your document. This is the sure-fire way to get rid of breaks you want to remove; now that you can see them, you can delete or backspace over them.

Caution: When you delete a break as shown in Figure 4-7, bear in mind that the usually invisible ¶ marker at the end of a paragraph "contains" the formatting for the paragraph that comes before it. If you join two paragraphs or sections together by backspacing until there's no break between them, they blend into one and take on the formatting of the *second* section or paragraph.

Working with Columns

If you're putting together, say, a newsletter or some classified ads, you can often make your outfit's publications look more professional by pouring it into multiple parallel *columns* (see Figure 4-8). Newspapers and magazines, for example, use columns in their layouts because the shorter lines are easier to read.

Tip: You can see multiple columns only in Page Layout view (View→Page Layout). Only one column per page appears in Normal view, much to the confusion of anyone creating columns for the first time.

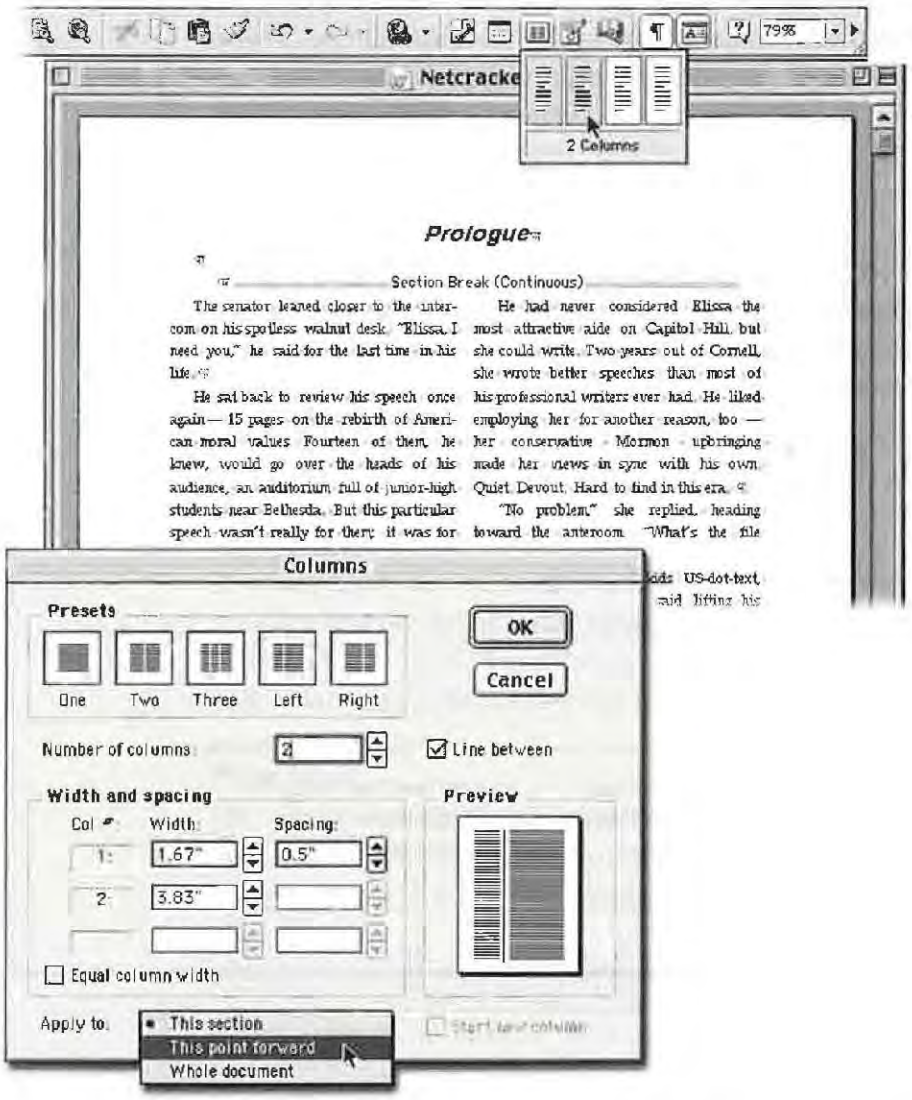


Figure 4-8:
Top: You can use the Standard toolbar's Columns pop-up button to convert a document into multiple-column format immediately. Bottom: For more control, choose Format→Columns. Here, you see two-column format, with a narrower left column and a line between them. The menu at the bottom of the box lets you choose whether to begin the columns from the insertion point or from the beginning of the document.

Adding columns using the Standard toolbar

The quickest way to create columns is to use the Columns button on the Standard toolbar, as shown in Figure 4-8. If you want your entire document in columns, make sure nothing is selected; if you want columns for only part of the document, select that text.

Then click the Columns pop-up button on the Standard Toolbar; drag downward and across to highlight the number of columns you'd like to use, as shown in Figure 4-8. If you need more than four columns, drag beyond their borders to expand the choices to five or six.

When you release the mouse, Word divides your text into columns of equal width. (If you highlighted only part of the document, Word automatically creates invisible *section breaks* above and below the selected portion; see page 139.)

Adding columns using the Columns dialog box

Although the Columns pop-up button on the toolbar is quick and easy, Word, as usual, offers far more control if you're willing to visit a dialog box. To use this option, select text or click in your document and proceed as follows:

1. **Choose Format→Columns.**

   When the Columns dialog box opens (see Figure 4-8), the number of columns is preset to One, meaning that your text takes up the entire width of the page.

2. **Choose one of the icons at the top of the dialog box, or enter a number in the "Number of columns" box.**

   The buttons labeled Two and Three create two or three columns of equal width. Left and Right mean, "Give me the number of columns I've specified in the 'Number of columns' box, but make the first column half as wide, or twice as wide, respectively, as the other columns, for some visual spice."

3. **Click the arrow buttons next to the Width box for each column or the spacing boxes.**

   You'll find Width boxes available for the number of columns you've requested. The Preview box shows the results of your choices. To create columns of equal width at any point, check the "Equal column width" box.

4. **If you so desire, turn on "Line between" to draw a thin vertical line between columns. Click OK.**

You return to the document, where the fancy columns are now in place.

How columns look and flow

As you type down to the bottom of a column on the page, the text automatically flows to the top of the next column. If you want to end one column and move on to the next, choose Insert→Break→Column Break.

Columns start out left-aligned, with an uneven right margin. Fully justified columns give the tidiest, most professional look. To justify columns, select all the text in your columns (⌘-A if that's your entire document), and then click Alignment and Spacing→Justification on the Formatting Palette. (Consider turning on automatic hyphenation, too, for better word spacing, as described in the following section.)

Adjusting column widths

You can resize columns by dragging the column margin markers on the ruler, as shown in Figure 4-9.

Using the Format→Columns dialog box to resize columns gives you better control over the measurements, and gives you access to the "Equal column width" feature (see Figure 4-10). If you turn on this box, the columns remain the same width no matter what; if you resize one of them using the arrow buttons, the others automatically grow or shrink to match.

If you don't turn on "Equal column width," then you can resize each column individually; the other columns grow or shrink to fill the page width. You can also adjust the spacing with the arrow buttons (or by entering numbers in the boxes) and letting the columns' sizes follow. Keep an eye on the Preview pane to see the effect of your changes. The total width of the columns and spacing always equals the full text width on the page: the width between the left and right indents.

Tip: If you're having trouble getting your column lengths to come out even at the bottom of the page, check the Paragraph Spacing (under Alignment and Spacing in the Formatting Palette). Leaving just a small amount of space before and after each paragraph makes it easier for Word to balance the columns.

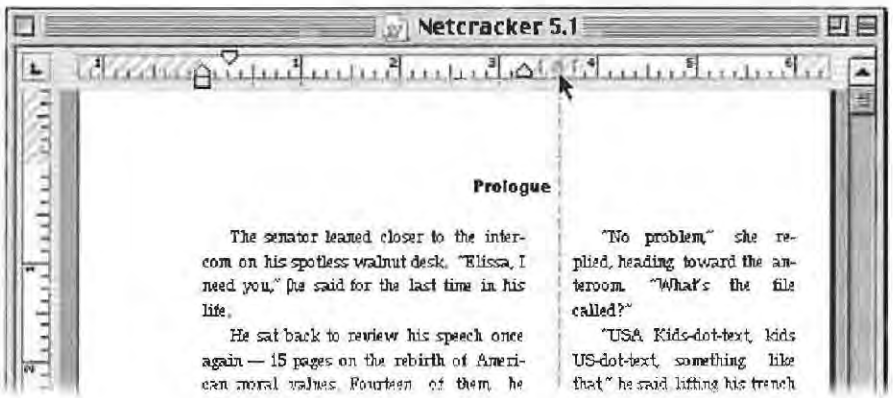


Figure 4-9:
The quickest way to adjust column widths is by eye. First choose View→Page Layout. Then place the cursor over the ruler at the top of the page near the column boundary you'd like to adjust. When the cursor turns into a double-arrow box, drag to move the column margin.

Automatic Hyphenation

When you're using columns, hyphenation (a feature that automatically breaks longer words, with hyphens, at the right margin) gives you a straighter, more even right margin (see Figure 4-10). It also grants you more regular spacing within each line in *justified* text (see page 110).

Word's factory setting is not to insert hyphens until you type them—or until you turn on the automatic hyphenation feature. To do so, choose Tools→Hyphenation; turn on "Automatically hyphenate document." When you click OK, Word goes through the document and hyphenates words where necessary, using its built-in dictionary as a guide to "legal" syllable breaks. Word will continue hyphenating automatically as you edit and add on to your document.

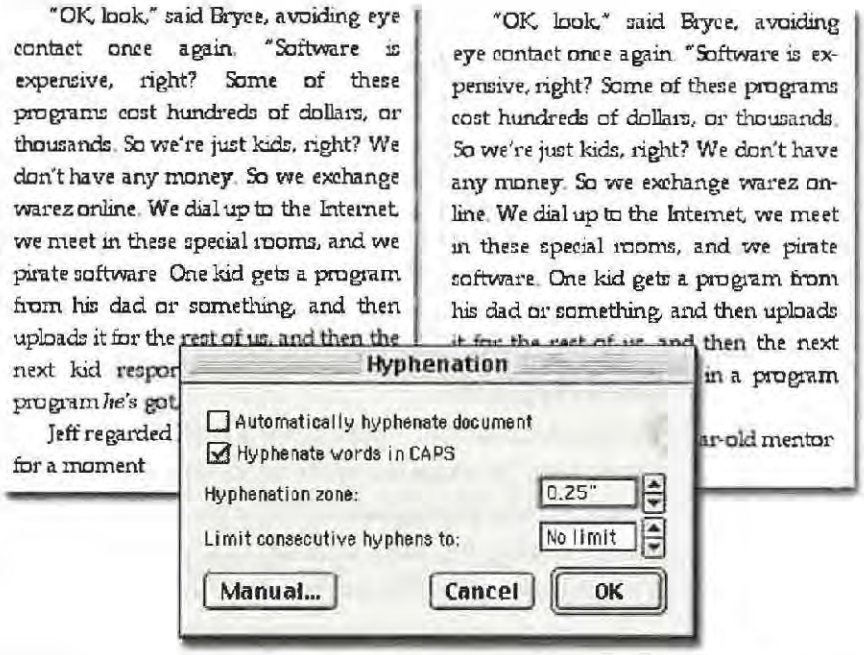


Figure 4-10:
Top left: By default, hyphenation is turned off, so that if a word is too long, Word moves it down to a new line. The result can be ugly gaps between words.

Bottom: Turning on "Automatically hyphenate document" can produce much better-looking spacing (top right).

Hyphenation Settings

But before you click OK, take a look at the following hyphenation settings:

- If you turn off "Hyphenate words in CAPS," Word leaves your acronyms whole; that's probably what you want it to do.
- The "Hyphenation zone" is the amount of space Word will allow at the end of a line before it resorts to using a hyphen. The larger you set this number, the fewer hyphens you'll end up with in your document. The smaller the number, the more even the right margin will be—and the more hyphens you'll have.
- Set "Limit consecutive hyphens" to 2 or 3. More than that, and all the consecutive hyphens at the end of consecutive lines start to look like a little ladder climbing up the page (a big no-no in professional publishing).

Undoing hyphenation is easy: just choose Tools→Hyphenation and turn off the "Automatically hyphenate document" box. Word returns your document to its pristine, prehyphenated condition.

Manual Hyphenation

The automatic hyphenation feature is an all-or-nothing deal; it applies to the entire document, or not at all. If you'd like more say in what Word hyphenates, you can use manual hyphenation. This method gives you the chance to say Yea or Nay to each word that Word wants to break up.

To do so, choose Tools→Hyphenation and click Manual. Word goes through your document and stops at each word it wants to hyphenate, just as in a spelling check. In the Manual Hyphenation dialog box that appears, you can click No (don't hyphenate), Yes (hyphenate at the blinking hyphen), or use the arrow keys to move to the point where you want Word to put the hyphen and *then* click Yes. Clicking Cancel both dismisses the dialog box and ends manual hyphenation.

If you expect to do any major editing after hyphenating manually, consider doing another hyphenation pass. Unlike automatic hyphenation, manual hyphenation doesn't add or remove hyphens automatically as your text reflows during editing. (You can also rehyphenate only parts of the document by selecting the text before doing a manual hyphenation.)

Hard Hyphens

For the true control freak, Word offers two ways to place hyphens right where you want them. You can use these keyboard shortcuts whether or not you use the manual or automatic hyphenation features. For example, you can inspect your document one last time after your manual hyphenation pass and change a hyphenated word to a nonbreaking hyphen, if you find there are too many hyphens in a row.

- **Optional hyphen.** If you click inside a word and then press ⌘-Hyphen, you tell Word where to place a hyphen *if* the word needs to be hyphenated. As you edit the document, if the word moves away from the end of a line, the optional hyphen disappears, only to come back if the word needs to be divided again.
- **Nonbreaking hyphen.** Click inside a word and then press ⌘-Shift-hyphen. You've just told Word that you *do not* want to hyphenate this word, ever.

To delete optional hyphens and the oxymoronic nonbreaking hyphens, click the Show/Hide (¶) button on the Standard toolbar or the Formatting Palette. The invisible hyphens become visible (they look like an L-shaped bar and an = sign, respectively) and ready for you to delete.

Note: If Hyphenation is grayed out on the Tools menu, you may be in Outline or Master Document view, in which hyphenation is unavailable. If, after switching to one of the other views, hyphenation is *still* grayed out, you probably need to install the Hyphenation software module. See Appendix A for more detail.

Text Boxes

Putting text in a box of its own, sitting there independently on the page, gives you a quantum leap in text-flow management (see Figure 4-11). You can format and color

a text box independently from everything else on the page, and use drawing tools on it. In other words, text boxes let you think outside the box.

Text boxes also emulate the way desktop publishing programs such as Quark XPress and PageMaker handle text. If you've never used professional desktop publishing software, consider this your first training ground.

Note: Text boxes *completely disappear* in Normal view. To work with text boxes, make sure you're using Page Layout view (View→Page Layout)–or be prepared for some surprises when you see the printout for the first time.

Creating Text Boxes

To start a text box in your document, choose Insert→Text Box. (Another avenue: If the Drawing toolbar is open [page 593], click the Text Box button, which looks like a capital A with an I-bar next to it.)

Move the mouse to where you'd like the box to appear, and drag diagonally; Word shows you the rectangular outline of the box you're creating. The box is complete when you let go of the mouse; you can always resize or move it later. To put text inside your new text box, click inside it and type or paste. You can also paste into it.

Tip: If you have existing text that you'd like to enclose in a text box, first select the text, then choose Insert→Text Box or click the Text Box button. Your text appears in a small text box, which you can then resize.

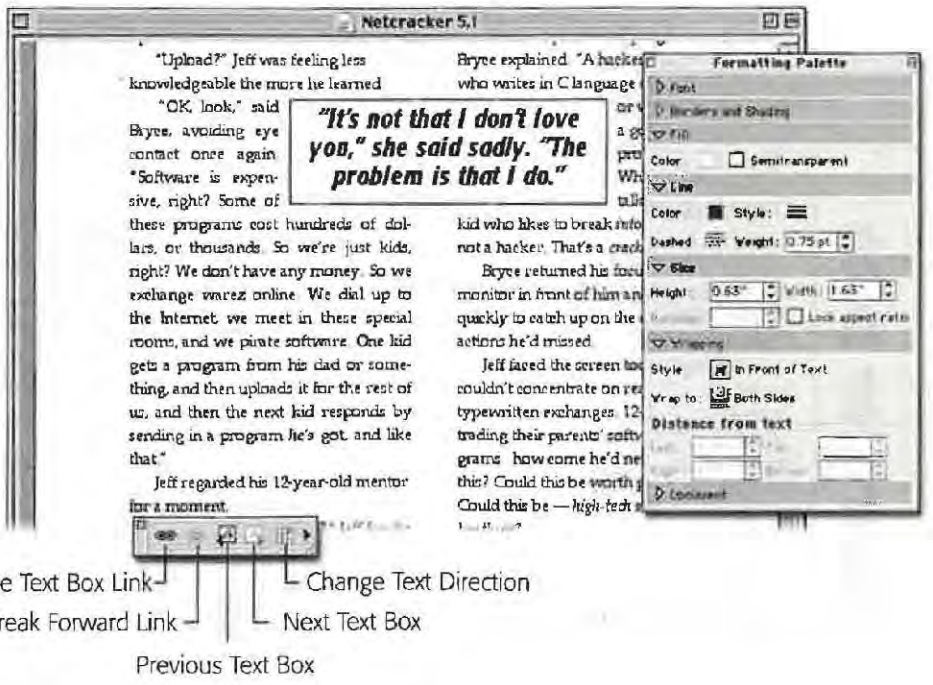


Figure 4-11:
Top: A text box is ideal for pull quotes, *like the one shown here–quotations designed to catch the eye of a reader.*

Left: The Text Box toolbar is a fickle thing. Sometimes it goes away all by itself. (To get it back, click a text box, then choose View→ Toolbars→Text Box.)

Right: When a text box is selected, the Formatting Palette changes to reflect the tools you need.

The Text Box Toolbar

The diminutive Text Box toolbar appears when you first create a text box, as shown in Figure 4-11. Its buttons let you:

- **Link and unlink text boxes.** *Linking* text boxes sets up an automatic text flow from one to another, exactly as in PageMaker, QuarkXPress, or any newspaper on earth that makes you "Continue on page 13A." As you add text to the first text box, overflow text falls into the second one, even if it's many pages away. Most people never suspect that Word is even capable of this page-layout feature, perhaps because it's buried in this shy toolbar.

  To link two text boxes, click the first box, and then click the Create Text Box Link button (see Figure 4-11); the cursor turns into a pitcher, as if to pour text into the next box. Then click the second box. Excess text flows automatically from the first box into the second. (Press Esc or ⌘-. to back out of the process.)

Tip: There's nothing to stop you from repeating this process, linking three, four, or many text boxes together into a continuously linked chain. You may drive your readers crazy, but you can do it.

  To break a link between two boxes, click anywhere in the first of the two boxes and click the Break Forward Link button. The text from the second box now flows back into the first one, leaving the second box (and any subsequent boxes in the chain) empty.

- **Navigate from one text box to another.** The next two buttons on the Text Box toolbar (see Figure 4-11) come in handy if you have lots of text boxes distributed far and wide in your document. They step you forward and back through the text boxes, skipping over everything in between.

- **Change text direction.** Clicking this button rotates the text within the box (and all others linked to it), as shown in Figure 4-12.



Figure 4-12:
Clicking Change text direction on the Text Box toolbar (or choosing Format→Text Direction, allows you to create eye-catching mastheads like this one. You can make text read top to bottom, bottom to top, or back to normal. (You can't turn text upside down.) Use this trick for creative layout effects for newsletter mastheads or letterheads.

Formatting within Text Boxes

You can use any of Word's formatting features on text within text boxes; just select the text first. The tools on the Standard toolbar and the Formatting Palette pertain to the text within a box while the insertion point is in that box.

Tip: When you choose Edit→Select All or press ⌘-A while the insertion point is in a text box, you select all the text in that box *and* any boxes that are linked to it.

To adjust the margins within a text box, choose Format→Text Box. (This choice only shows up when the insertion point is within a text box.) Click the Text Box tab, as shown in Figure 4-13. The settings you make in these boxes control the distance between the borders of the text box and the text itself.

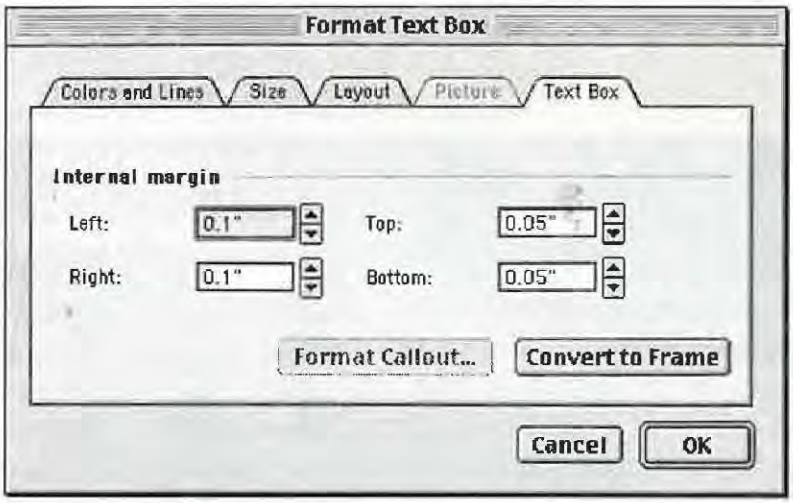


Figure 4-13:
Even if text boxes are linked, the internal margin settings here apply only to the text box containing the insertion point.

Changing the background color or border style

When a text box is selected, the Formatting Palette changes to offer specialized controls for formatting its line thickness, line color, and background ("Fill") color or pattern. In fact, because a Word text box is a kind of cross between a text block and a *drawing object* (see Chapter 18), many of the icons on the Drawing toolbar affect text boxes. For example, the Drawing toolbar offers 3-D and shadow effects, which look great on text boxes.

Tip: To use the drawing tools on a text box, make sure to select the box itself, not the text inside it. To do so, position the cursor on the box's outline until the cursor turns into a hand, and then click. (When you click *inside* the box, the tools on the Formatting Palette turn back to text tools.)

Sizing text boxes

If you can't see all the text in a box, you can either link it to another text box or just make this one bigger. To do so, select the box by clicking it, and then drag any of the

tiny white resize handles at its corners. Or, for numerical precision, use the boxes on the Size section on the Formatting Palette; the relevant portion of the Formatting Palette is shown in Figure 4-11.

Working with Linked Text Boxes

Microsoft's name for a group of linked text boxes is a *story*. There's no limit to the number of text boxes you can link together: just keep creating new ones and linking them, as described on page 146, until there's room for all your text.

Copying linked text boxes

You can copy or cut an entire story (or part of one) to paste into another document. To do so, select the text *box* (not the text) of the first box in the story and Shift-click any additional text boxes you want to copy. Once they're selected, you can now copy or cut and paste the chain of boxes using any of the copy/paste methods described in Chapter 2. Use this method if, for example, you want to copy a series of text boxes and then change the text inside of them, to save the work of creating and sizing new text boxes.

POWER USERS' CLINIC

Character Spacing

When working with text flow, you're usually concerned with the big picture, such as where the text goes and whether a word is divided. But in times of page-layout stress, your control in Word can get much finer than that; you can actually adjust the letter spacing between individual letters—an especially useful control in text boxes.

Select the text that you'd like to work on. (You'll probably want to adjust the character spacing of only a single line or a few words at a time.) Then choose Format→Font→ Character Spacing tab.

As you use the Spacing (horizontal) and Position (vertical) settings, keep an eye on the Preview window, which shows you the results of what you're doing. The Scale percentage controls the magnification of the Preview window, in case you need to look *really* closely.

- **Spacing.** Choose Expanded or Condensed from the pop-up menu, then click the arrows to choose the amount of space that Word puts between each character in your selected text. (One point is 1/72nd of an inch.)
- **Position.** Choose Raised or Lowered from the pop-up menu, then click the arrows to tell Word how much higher or lower to position the selected text. Thus, if you're concerned with the amount of space between two lines, select one or the other of the two lines and move it higher or lower until you get the results you want.

Note that *character spacing* isn't quite the same thing as what professional typesetters called *kerning*. Kerning refers to the space between certain specific pairs of letters, such as capital T and lowercase o. Especially in larger type sizes, the word "To" can look odd, for example, because there's too much space between the T and o. Kerning moves the o closer so that it's slightly *under*, rather than coming after, the top arm of the T.

In Word, kerning is a feature that you can set to kick in automatically according to your text's size. (Kerning is usually unnecessary in body text; it's more critical in headings and other large point size text.) If your headings are in 14-point type, for example, set the "Kerning for fonts" box to 14 points and above. That's all you have to do; Word makes sure that the kerning pairs are shifted automatically, based on information embedded in the font itself. (Word offers no manual kerning controls.)

Note: Word can't link text boxes across documents, keeping the text flowing "live" from one to the next.

To cut or copy the *text only* from a story, click in any box in the chain and choose Edit→Select All (or press ⌘-A). Now when you use the cut or copy and paste commands, you'll be pasting just the text, not the boxes.

Deleting one text box in a chain

If you delete one box in a story, the text remains intact, flowing from beginning to end through the remaining text boxes in the chain. Select the box that you want to delete by holding the cursor over the box's boundary until it changes into a hand icon; click the box edge. Then choose Edit→Clear (or press Delete). If necessary, make the remaining linked text boxes larger to show all the story text.

Grouping text boxes

You can *group* text boxes just as you would group any graphic objects (see page 594); the only trick is selecting them. As noted above, the trick is to click their *borders;* Shift-click to select the additional boxes that you want to group. Once they're selected, choose Group from the Draw pop-up button (the top button on the Drawing toolbar). (If you change your mind, the Ungroup and Regroup commands are on this same menu.)

When you drag a grouped text box, they all move together. When you drag the sizing handles, they all grow or shrink by the same amount. When you use the color and fill commands, they act upon all boxes in the group.

Text Wrapping and Layering

Whether you're making a Web site or a printed document, one of the most fun parts is putting in a few images—photos, clip art, or drawings. But too often, the text and graphics don't share the space as harmoniously as they should. Many people find topics like *text wrapping* too intimidating to bother learning.

Don't be one of them. Word's layout features are more intuitive than ever, especially for you, the wise and discriminating Mac user.

Wrapping text around things

The "things" around which you can wrap text can be clip art from Word's own collection (see "Adding Insertions" in the next section); drawings you've done in programs like Word, AppleWorks, or Illustrator; AutoShapes from the Drawing toolbar; or text boxes. (See Chapter 18 for a review of the various graphic objects you can place into a Word document.)

To get started, select the graphic or text box you want to wrap your text around. Ignore the text for now; just worry about getting the picture where you want it on the page. Then consult the Wrapping section of the Formatting Palette, as shown in Figure 4-14; it offers a pair of pop-up buttons that specify how you want the text to wrap.

Advanced text wrapping

As always in Word, the Formatting Palette is the quickest way to achieve a result (text wrapping, in this case), but more control awaits in a dialog box. Here's how to get there:

1. **Click to select the graphic or text box, then choose Format→whatever.**

   In other words, choose Format→Picture, Format→Object, Format→AutoShape, or Format→Text Box; the wording of the bottommost choice on the Format menu depends on what kind of item you've selected. In any event, the appropriate Format dialog box now appears (shown at left in Figure 4-14).

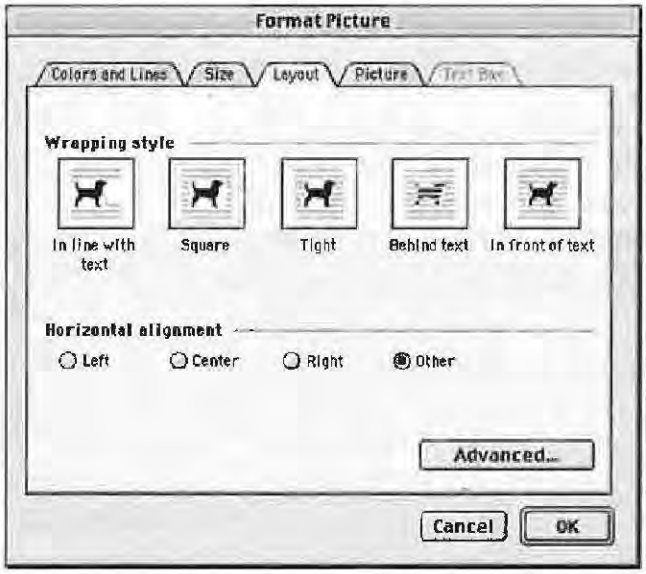


Figure 4-14: *The text-wrapping controls in the Format dialog box (left) mostly correspond to the Style and "Wrap to" buttons in the Formatting Palette (right). Your text can leave a square hole for the graphic (Square), hug its irregular sides (Tight), sit superimposed on it (Behind Text), be covered up by it (In Front of Text), or treat it as just another typed character (In Line With Text).*

2. **Click the Layout tab. Choose one of the text wrap styles by clicking its icon.**

   These wrapping controls correspond to those on the Formatting Palette. For example, choose Tight if you'd like the text to hug the outlines of an irregularly shaped object. Choose Behind Text to create a watermark, or Square for a neat, businesslike look.

3. **To keep the object right where you placed it on the page, click Other under "Horizontal Alignment."**

   The other buttons move the object to line up with the left margin, center line, and right margin, respectively.

4. **Click Advanced.**

   A new dialog box appears (see Figure 4-15).

5. **Make the changes you want, as shown in Figure 4-15; then click OK twice.**

Layering text with graphics

Most of the time, you'll want to wrap text *around* objects. But sometimes, for effect, you'll put text right *over* an object, or vice versa. You pull this off using the "Behind text" or " In front of text" options shown in Figures 4-14 or 4-15.

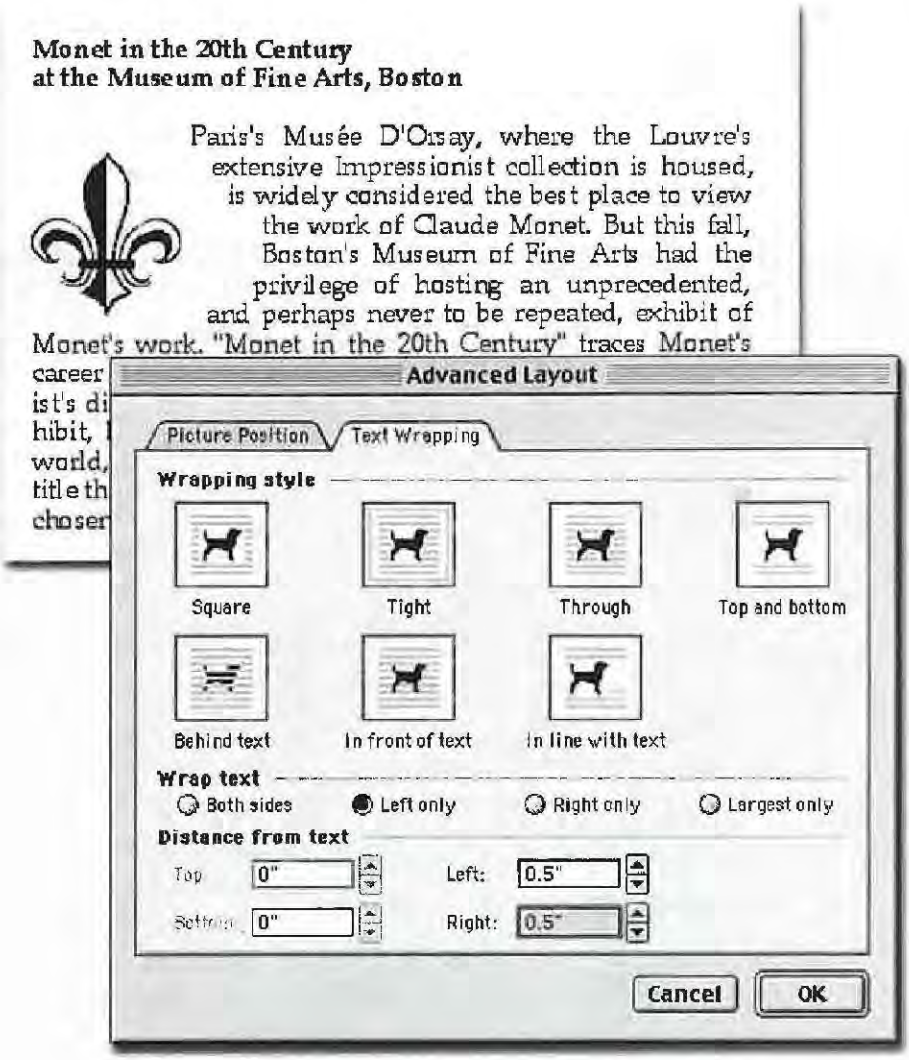


Figure 4-15:
Top: A Word clip art inserted into a document; left alignment, tight wrapping, one side only, 0.5" from text.

Bottom: The Advanced Layout tab contains additional options. For example, you can ***Wrap text*** *on one side only instead of both sides. One of these may be a better choice if the text wrapping is down one side of a column. "Largest only" wraps text only on one side–the side that has the most room, even if that changes in the middle of the object. This is a good choice for irregularly shaped objects.* ***Distance from text*** *lets you choose how close you want the text to snuggle up to the object it wraps, in hundredths of an inch.*

If the text is hard to read because of being superimposed, you have a few options: lighten the object beneath the text, or, if the text has a fill, change it to a clear or semitransparent fill.

- To lighten an object, select it. If it's a picture, click the Image Control button on the Picture toolbar (which opens automatically) and select Watermark. (If your picture is clip art, this is your only lightening option.) Another way to lighten a picture is to click Color Adjustment on the Formatting Palette and choose the Saturation radio button. Then use the Setting slider to lighten the image as much as you need to.

- If the object is a drawing or AutoShape, choose Format from the Draw pop-up button on the Drawing toolbar. You can now choose lighter colors for the lines and fill, or click the Semitransparent box on the Colors and Lines tab. Semitransparent color allows you to see through the fill to an object behind the text. When the object is behind text, semitransparent makes the object light enough for the text to be clearly readable over it.

Tip: You can even layer text with text—a great trick when you want to use your company's name as a watermark behind a letter on your letterhead, for example. To do so, make a text box containing the logo, apply a light color or light shade of gray to it in the Formatting Palette, and choose "Behind text" from the Style pop-up button in Formatting Palette's Wrapping section. Drag the logo into place.

WORKAROUND WORKSHOP

Text Boxes and Text Frames

Before Word 98, all text boxes were called text *frames*, and they had fewer features than they have now.

When you open a document from an earlier version of Word that contains frames, they remain intact. You can continue to work with the text frames by selecting them and using the Format→Frame dialog box.

But frames are far more limited than today's text boxes. You can't link or group them, rotate the text inside them, or format them using the Borders and Shading dialog box or the Drawing toolbar as described in this section.

If you'd like to convert old text frames *into* text boxes, there's only one way to do it, and it's a workaround. Create a new text box (see page 144), and then cut and paste the text from the frame. Finally, select and delete the orphaned text frame.

Or, to remove a text frame *without* putting its text into a text box, choose Format→Style. At the bottom of the Modify Style dialog box, choose Format→Frame, and then click Remove Frame.

On the other hand, frames aren't dinosaurs altogether. Some Word features work in text frames but *not* in text boxes, including footnotes and endnotes (see page 183), comments (page 167), field codes for tables and indexes, and AUTONUM fields.

To create a text frame around a paragraph, choose Format→Style and click Modify. At the bottom of the Modify Style dialog box, choose Format→Frame; use the settings in the Frame dialog box to adjust the text wrapping and other attributes. You can resize and move text frames in your document just like text boxes, but you can also enter exact position settings here. To reopen the Frame dialog box at any time, click inside the frame and then choose Format→Frame.

Finally, there's an even quicker way to create a text frame: Create a text box as usual (page 144), and then, with the text box selected, choose Format→Text Box→Text Box tab. Click Convert to Frame.

Pictures and Drawings

Word comes with enough graphics features to make AppleWorks quake in its boots; at this point, "Microsoft Word and Picture 2001" might have been a better name for the program. More and more, the skilled use of pictures, drawings, and other embellishments is necessary to the creation of a comprehensive, readable document.

The Insert menu offers a long list of graphic objects that you can pop onto a Word page: clip art, scans from a digital camera or scanner, drawing objects called AutoShapes, and so on. Because this Insert menu is available in most of the Office programs, its graphic commands are described in Chapter 18.

Using graphics in Word entails only a few special pieces of knowledge. First, you can specify how the existing word processor text interacts with each graphic—whether it wraps around or passes over or under the image. That's the purpose of the Text Wrap commands described earlier in this chapter.

Inline vs. Page Graphics

Second, it's important to understand that you can paste a graphic in either of two ways:

- As an **inline graphic**, one that sits right in the text. If you delete or insert text in preceding sentences, the graphic gets shoved backward or forward as though it's just another typed character.
- As a **page graphic**, one that's married to a particular spot on the *page*. If you add or delete text, nothing happens to the graphic; it sits right where you inserted or pasted it.

Note: *Page graphics don't show up* in Normal view, Outline view, or Master Document view. To see them, you have to switch into Page Layout view, Online Layout view, or the print preview.

The distinction between inline and page graphics has been a source of confusion since Word 1, and Microsoft continues to fiddle with the design of the controls that let you specify which is which.

In Word 2001, the scheme is simple, as long as you understand the technical difference between the two kinds of graphics that Word handles:

- **Drawing objects** always begin life as *page graphics*, floating on the page with no relationship to your text. (Drawing objects are graphics that *you make yourself*, right in Word, using the tools on the Drawing toolbar. They include AutoShapes, text boxes, arrows, rectangles, freehand lines, and so on.)
- **Pictures** always begin life as *inline graphics*, embedded right in a line of text. (*Pictures* are images you import from other sources; they include Word's own clip-art gallery, scans and other digital photos, Photoshop files, and the like.)

Tip: See Chapter 18 for more detail on the distinction Word makes between drawing objects and pictures.

Converting Inline Graphics ↔ Page Graphics

Just because drawings start out floating on the page and pictures start out hooked into your text doesn't mean they have to stay that way. It's easy enough to convert an inline graphic into a page graphic or vice versa, like this:

1. **Double-click the graphic.**

   (You have to be in Normal or Page Layout view to double-click a picture, or Page Layout/Online Layout to double-click a drawing.) The appropriate Format dialog box appears.

2. **Click the Layout tab.**

   The dialog box shown in Figure 4-14 appears.

3. **To convert a page graphic to an inline graphic, click "In line with text"; to convert an inline graphic to a page graphic, click any of the remaining Text Wrap icons. Click OK.**

   Word automatically switches views, if necessary, so that it can show you the graphic in its new environment: Your former inline graphic is now floating on the page in Page Layout view, or your former page graphic is now just another typed character in Normal view.

Charts, Spreadsheets, and Equations

Using Word's Insert→Object command, you can embed a variety of data from other Office programs right into a Word document: charts, equations, graphics, and other Office documents.

Role	Show	Where Performed
Tevye	*Fiddler on the Roof*	Mill Mountain Playhouse, 1996
Rumpleteaser	*Cats*	College Light Opera Company, 1995
Director	*A Chorus Line*	Cleveland Playhouse Youtheatre, 1994
Jesus	*Godspell*	Dayton Young Players, 1993
Nathan	*Guys and Dolls*	Dayton Young Players, 1992

Role	Show	Where Performed
Tevye	*Fiddler on the Roof*	Mill Mountain Playhouse, 1996
Rumpleteaser (Understudy) 1995	*Cats*	College Light Opera Company,
Director	*A Chorus Line*	Cleveland Playhouse Youtheatre, 1994
Jesus	*Godspell*	Dayton Young Players, 1993
Nathan	*Guys and Dolls*	Dayton Young Players, 1992

Role	Show	Where Performed
Tevye	*Fiddler on the Roof*	Mill Mountain Playhouse, 1996
Rumpleteaser (Understudy)	*Cats*	College Light Opera Company, 1995
Director	*A Chorus Line*	Cleveland Playhouse Youtheatre, 1994
Jesus	*Godspell*	Dayton Young Players, 1993
Nathan	*Guys and Dolls*	Dayton Young Players, 1992

Figure 4-16:
Top: If you use tabs to set up a table, things may look good at first—as long as every line fits within its space and you never plan to insert any additional text.

Middle: Here's what's wrong with the tab approach. When you insert the word Understudy *into one of the columns, it pushes too far to the right, causing an ugly ripple effect that will take you a long time to straighten out.*

Bottom: If you use a table, you never have this kind of problem. You can type as much text as you like into a "cell"; that row of the table simply expands to contain it. (The light gray gridlines don't print unless you want them to.)

You'll find a complete description of this feature, whose technical name is Object Linking and Embedding technology (abbreviated OLE and pronounced "oh-LAY") on page 547.

Tables

How do you use Word to create a résumé, agenda, program booklet, list, multiple-choice test, Web page, or other document where numbers, words, and phrases must be aligned across the page? In the bad old days, people did it by pressing the Tab key to line up columns. As Figure 4-16 illustrates, this method is a recipe for disaster. (Unfortunately, thousands of people *still* use this method—or, worse, they still try to line up columns by pressing the Space bar a lot.)

Using Word's *table* feature is light-years easier and more flexible. As illustrated in Figure 4-16, each row of a table expands infinitely to contain whatever you put into it; everything else on its row remains aligned. Tables also have a few simple spreadsheet features.

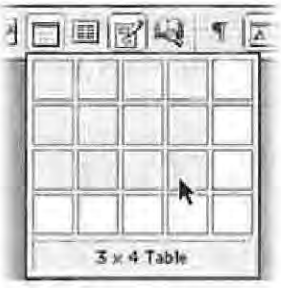
Creating Tables

There are two ways to insert a table: you can let Word build the table to your specifications, or you can draw it more or less freehand.

Inserting a table

The quickest way to insert a table is to use the Insert Table pop-up button on the Standard toolbar (see Figure 4-17).

If the toolbar isn't visible, choose Table→Insert→Table. The Insert Table dialog box opens, also shown in Figure 4-17.



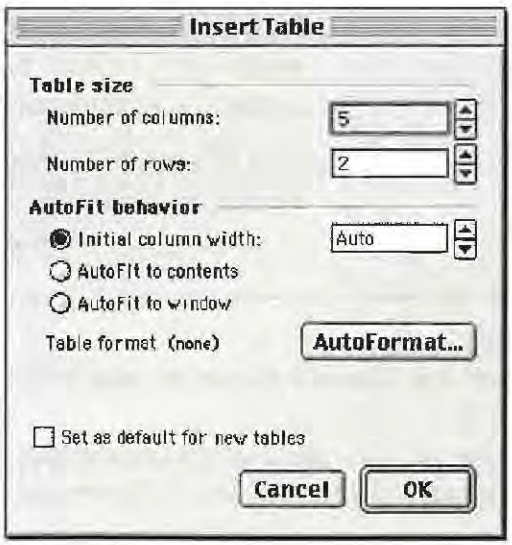


Figure 4-17:
Left: The Insert Table button on the Standard Toolbar is a quick way to make a small table. As you drag through the grid, you're specifying the table size you want. (You can drag beyond the boundaries shown here, by the way, to specify—for example—a 9 x 9 table; the pop-up grid grows as necessary.)

Right: If you often use the same kind of table, you can turn on "Set as default for new tables" to make your favorite settings the new defaults. They will appear in this dialog box each time you choose Table→Insert→Table.

After you choose the number of rows and columns you wish to start with (you can always add more later), click an AutoFit radio button to tell Word how to size the columns across your table. If you know how wide in inches you'd like each column to be, click "Initial column width" and set a measurement in the size box. "AutoFit to contents" creates skinny columns that expand as you type into them, and "AutoFit to window" spaces the selected number of columns evenly across the page. The table appears in your document at the insertion point when you click OK. Figure 4-18 shows a small 3-by-3 table.

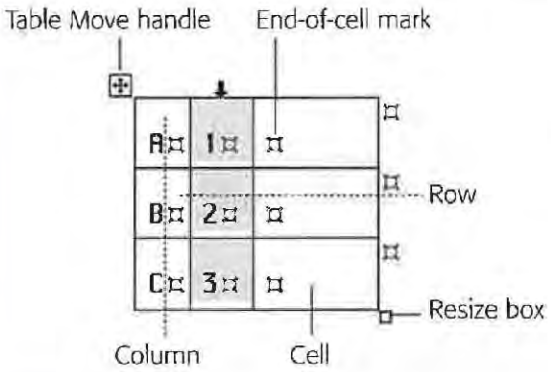


Figure 4-18:
The light gray markings shown here appear when you click the Show ¶ button on the Standard toolbar or Formatting Palette. To select an entire column, click near the top of it–the cursor turns into a tiny arrow. To resize a row or column, drag the horizontal or vertical lines when the cursor turns into a double arrow. The resize box at lower right keeps all rows and columns in proportion as it expands or shrinks the entire table.

Drawing a table

Word's Draw Table tool gives you free rein to form the table of your dreams—the trick is learning to control it.

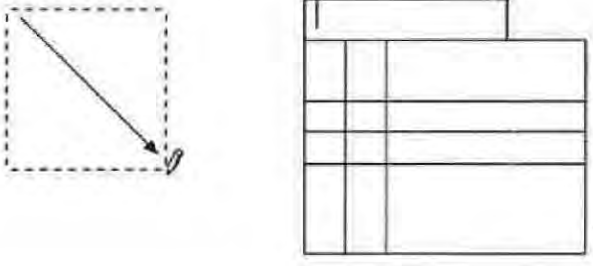
To summon this toolbar, click the Tables and Borders button on the Standard toolbar, choose View→Toolbar→Tables and Borders, or choose Table→Draw Table. The Tables and Borders toolbar opens and the cursor turns into a pencil.

When you drag the pencil horizontally or vertically, it draws lines; when you drag diagonally, it draws boxes. Using these techniques, you can design even the most eccentric, asymmetrical table on earth.

The tidiest way to begin drawing a table is to drag diagonally to create the outer boundary, as shown at the left in Figure 4-19, then drag horizontal and vertical lines to create the rows and columns. Drawing your own table is the best option when

Figure 4-19:
Left: Drag diagonally to create the outer border of your table.

Right: The Draw Table tool lets you create rows and columns of any size and shape just by drawing them.



you want a variety of widths in your rows and columns, as shown in Figure 4-19, rather than evenly spaced ones.

To remove a cell or line you've just drawn, hold down the Shift key (or click the eraser tool on the Tables and Borders toolbar) and drag it across a line. The line promptly disappears.

When you're done designing your table's framework, dismiss the Tables and Borders toolbar (by clicking its tiny close box, for example). The insertion point is now blinking in your new table, ready to begin typing.

Typing into tables

To type into a table cell, click in that cell. You can use the up or down arrow keys to change rows; press Tab and Shift-Tab to jump forward or backward through the cells. (There's not much call for tabs within cells—after all, you've *already* lined up text the way you like it. But if you need a Tab character, press Option-Tab.)

Note: Pressing Return or Enter *doesn't* take you to the next cell; it puts a line break in the *current* cell. Get in the habit of pressing Tab to move on to the next cell.

You can also navigate like this:

To move to:	**Press these keys:**
First cell in the row	Control-Home
Last cell in the row	Control-End
Top cell in the column	Control-Page Up
Bottom cell in the column	Control-Page Down
Highlight whole table	Option-Clear

As you type, text wraps within the cell, forcing the row to grow taller as necessary. To make the cell get wider as you type, choose Table→AutoFit→AutoFit to Contents. (Even then, the cell will get wider only until the table reaches the edge of the page—then the text will start to wrap down.)

Of course, this automatic wrapping is the principal charm of tables. But if you find yourself wishing Word would *not* wrap text in this way, select the cells in which you want wrapping turned off, and then choose Table→Table Properties→Cell tab. Click Options and uncheck the Wrap Text box. You can still enter as much text in a cell as you like, but the cell won't expand downwards to show it—it will just disappear beyond the cell boundary.

Selecting cells

To cut, copy, or drag material from cells in a table, you must first select it, as with any other Word text. Because it's a table, however, you have a variety of options:

- Drag with the mouse, down, across, or diagonally over the cells you want.
- Click at the top of a column—the cursor changes into a downward-pointing

arrow—to select an entire column. Likewise, click at the left of a row—the cursor changes into a right-slanting arrow—to select an entire row, or the thin, invisible *selection bar* at the left edge of a cell to highlight that cell. (Double-click this selection bar to highlight a whole row.)

- Click, press Shift, and click with the mouse to extend the selection one cell, row, or column at a time.
- Option-click anywhere in a column to select the entire column.
- Triple-click the cursor at the beginning of any row to select the entire table.
- Use the Shift key with any of the navigation keystrokes described on page 157.

Sizing rows and columns

You can make a row taller or shorter, or a column wider or narrower, much the way you adjust Word's text boxes or margins; point to any line or boundary of a table without clicking; when the cursor turns into a double-sided arrow, drag.

You can also rely on Word's own automatic table features to help you design the table:

- **Balanced columns.** If you want symmetrical, balanced look, select the rows and columns that you want to balance, then choose Table→AutoFit→Distribute Rows Evenly or Distribute Columns Evenly.
- **Automatic sizing.** Often, you want the columns to stretch and shrink depending on what you type into them. Or maybe you just don't know in advance what size you want or need the columns to be. In such cases, choose Table→AutoFit→AutoFit to Contents. As you work, the columns will stretch to just the width necessary to show the contents. For maximum room, Table→AutoFit→AutoFit to Window stretches your columns, however many of them there are, to fill the page from margin to margin.

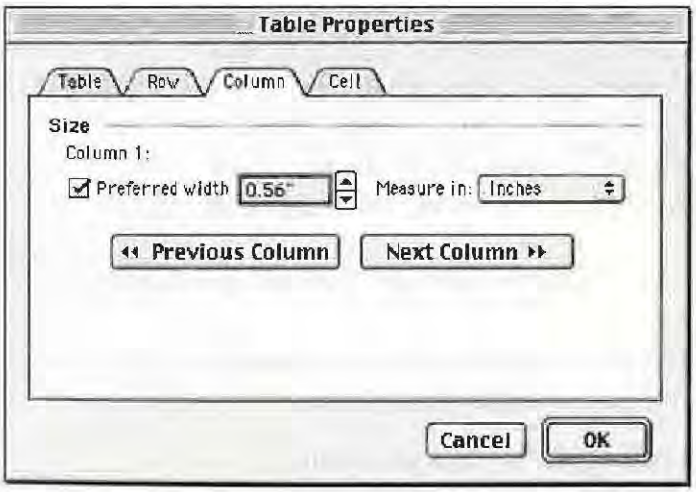


Figure 4-20:
When using the Table Properties dialog box, you can select a group of rows and columns and size them all at once, or you can use the Previous and Next buttons to work on each row or column one at a time.

At any time, you can resize the table using the mouse; you'll override and cancel the previous AutoFit setting. When you have the column widths right where you want them, choose AutoFit→Fixed Column Width.

- **Numeric precision.** To set row and column sizes using exact measurements, select the rows or columns in question and then choose Table→Table Properties. The resulting dialog box (see Figure 4-20) contains size boxes where you can enter exact measurements.

  For columns, you can also specify a percentage of the table width instead of a measurement in inches. For rows, you have the option of setting an exact measurement, or an "At least" measurement. When "At least" is chosen, the cells in that row will stretch downwards to wrap text as you type—even if you've turned off "Wrap Text" on the Cell tab as described on page 157.

- **The whole table.** To resize the table as a whole, drag the lower-right corner. The rows and columns remain evenly spaced or in the proportions you've chosen.

Adding rows and columns

If you run out of room and need more rows at the *bottom* of your table, it's easy to add more: click the lower-right cell and press Tab. A new row appears.

To add a new row or column *anywhere* in your table, click in the table and then use the Table→Insert submenu. Choose one of the options from the menu that appears: "Insert Columns to the Left," for example. (These commands are also available in the Insert Table pop-up button on the Tables and Borders toolbar.)

Adding multiple rows or columns at either end of your table, or anywhere within it, is a two-step process: First, highlight the *same number* of rows or columns as the ones you want to insert; to add two rows, select two existing rows.

Next, choose Table→Insert, and one of the submenu options (Insert→Rows Below, for example). Word instantly creates the requested number of new, empty rows or columns.

Inserting individual cells works much the same way. You can insert one cell at a time by choosing Table→Insert→Cells, or by using the Insert Table menu on the Tables and Borders toolbar. To insert multiple cells, select the equivalent number of *existing* cells at the desired location in your table before choosing from the menu.

Of course, you may find it more fun simply to click the Draw Table tool on the Tables and Borders toolbar and *draw* the extra columns and rows onto your table.

Deleting table parts

It's easy to dismantle a table in various ways:

- **Deleting cells.** You can get rid of one or more cells by selecting them and choosing Table→Delete→Cells. Word asks if you want to move the remaining cells up or leftward to fill the void; choose one and click OK (or press Return).

- **Deleting rows and columns.** Select them (as shown in Figure 4-18) and choose Table→Delete→Rows (or Columns). You may find it faster to click anywhere in the row or column and choose Table→Delete→Cells, then choose a radio button to delete the *entire* row or column. Click OK to confirm the deletion.
- **Deleting the whole table.** Click in the table and choose Table→Delete→Table.

Formatting Tables

When you click inside a table, the ever-responsive Formatting Palette sprouts a new set of formatting tools—a section called Table Cells. In conjunction with the existing Borders and Shading section, you have all the formatting controls you need.

To use them, begin by highlighting the cells, rows, or columns that you want to work on. Then you're all set to format any of these table elements:

- **Table border or gridlines.** The Borders tools let you choose a line style (solid, dashed, and so on), color, and weight (thickness in points). Clicking the Type button gives you a menu where you can choose which sides of the table you want borders to appear on. For instance, you may want only vertical lines inside the table and no outside border. Or you may want a heavier top border on the top row of cells only.

Tip: You can also eliminate certain table lines entirely. Just click the eraser tool on the top row of the Tables and Borders toolbar and drag along each line you want to disappear from the table.

- **Background shading in cells.** Shading in a table is similar to a *fill* (see page 121), except that you don't use the Fill palette; you use the Shading palette in the Formatting Palette (or Tables and Border toolbar).

AutoFormatting tables

With creative combinations of borders, lines, and shading, you can make a table look right for anything from Citibank annual reports to Sesame Street; but when you're in a hurry, you can choose a Table AutoFormat for instant good looks.

FREQUENTLY ASKED QUESTION

The Thin Gray Lines

I like the concept of a table, but I don't want thick black lines in my résumé (or Web page). How do I get rid of them?

One of the quickest ways to get rid of the borders and gridlines is to click inside the table and then choose Format→Borders and Shading; in the resulting dialog box, click None, then click OK.

Even then, however, you may still see thin *gray* lines. These don't print; they're just on the screen to help you understand the "tableness" of your table. You can hide even these lines, if you like, by choosing Table→Gridlines so that the checkmark disappears.

At this point, you might want to consider clicking the Show/Hide (¶) icon on the Standard toolbar. The end-of-row and end-of-cell marks become visible, defining the bounds of your table.

Click anywhere in your table and choose Table→Table AutoFormat. There's a long list of potential formats in the list box at the left of the Table AutoFormat dialog box. Click on each to see a preview. If you want to use *some* of the features in the format but not others (font, color, and so on), then just turn on the boxes for the ones you wish to use.

Tip: Turning on AutoFit is a good idea: it will ensure that the new format will exactly fit the existing information in your table, instead of vice versa.

Many of the formats have a different typeface or shading applied to the top (heading) row, first column, last column, and so on. The checkboxes in the "Apply special formats to" section control whether you take those features along with the rest of the format. For instance, if you're not using the last row of your table for totals, don't turn on the "Last row" box.

Table headings

For the purposes of AutoFormatting, Word considers the first row of a table to be a heading. But what if your table is longer than a page? Wouldn't it be nice if Word could *repeat* the column titles at the top of each page? It can, thanks to the Heading Rows Repeat feature.

Select the top row of your table (and any additional rows that you'll want to repeat). Then choose Table→Heading Rows Repeat; that's all there is to it. When your table flows onto a new page (page breaks you insert yourself don't count), the heading will appear at the top of each new page of your table.

Cell margins and spacing

To make your text look good in a table, you can adjust gap between the characters and the borderlines. You can also put a little space around the outside of each cell—an especially attractive effect on Web pages (see Chapter 7).

Just select one or more cells and choose Table→Table Properties→Cell tab. Click Options, and set measurements in the size boxes for the distance between the text and the top, bottom, left, and right edges of the cell. The "Same as the whole table" box changes the margins of the selected cell to match the default cell margins for the table. To set the default margins for all cells in the table at once, choose Table→Table Properties→Table tab; click Options and enter measurements in the "Default cell margins" boxes.

To put more spacing around the *outside* of cells, click anywhere in the table and choose Table→Table Properties→Table tab. Click Options and turn on "Allow spacing between cells"; enter a setting in the size box. When you click OK, that amount of white space will surround each cell, simulating the effect of thicker cell walls. Usually, .1" or less looks good. More space than that creates a waffle-like effect, as shown in Figure 4-21.

Text formatting within cells

Like text anywhere in Word, you can change the direction and alignment of selected text in a table using the Format→Text Direction command—a great effect for row or column labels, as shown in Figure 4-21 at right. In the resulting dialog box, choose the text orientation—horizontal, vertical, or bottom-to-top—and click OK.

You can also make the text in selected cells hug the left or right side of its cell, or center it right in the middle. To do that, choose Table→Table Properties→Cell tab, and choose the icon for right, center, or left. (To use the same alignment for the entire table, choose the alignment using the buttons on the Table tab instead.)

Table layout on the page

When you created your table, you probably dragged where you wanted it, or built it starting from the insertion point. To get it exactly where it looks best on the page

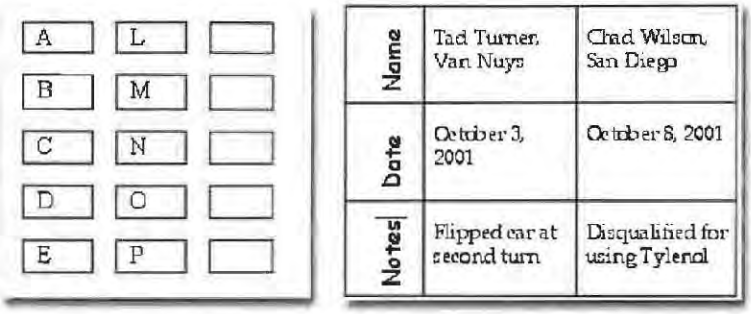


Figure 4-21:
Left: You can create some unusual table looks using, for example, .15" spacing between cells.

Right: Rotated text.

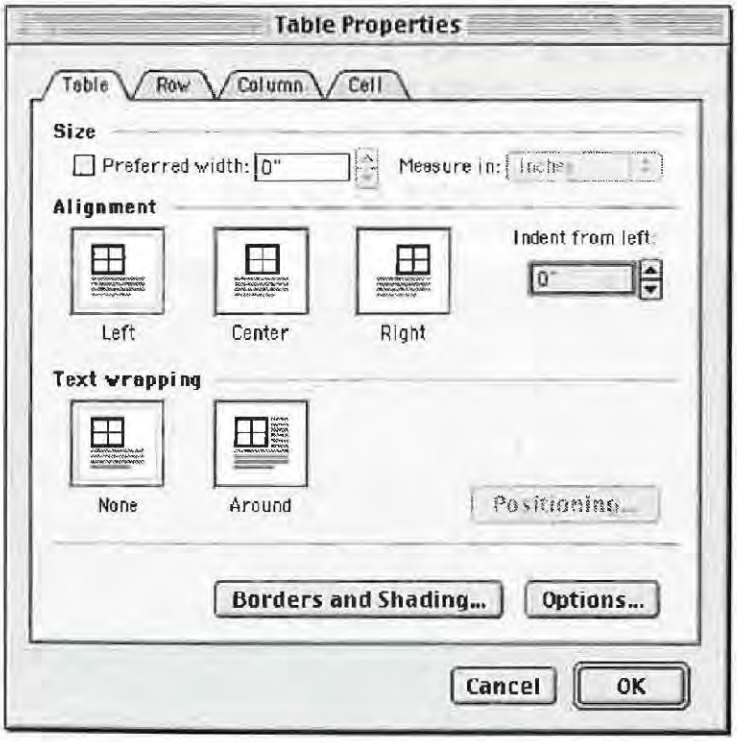


Figure 4-22:
Clicking the Borders and Shading button opens a dialog box where you can choose lines and fills for the table, as well as page borders.

and apply advanced features like text wrapping, use the tools in the Table→Table Properties→Table tab, shown in Figure 4-22.

- **Size.** Use this box to set a width for the entire table. (It says "*Preferred* width" because it may change if you use the AutoFit feature, as described on page 158.)
- **Alignment.** Choose left, centered, or right alignment. "Indent from left" tells Word where to start aligning from, measured from the edge of the page. (If your table already spans the page, margin to margin, you won't see any difference.)
- **Text Wrapping.** For large tables, you'll usually choose None. If you choose Around, the Positioning button becomes activated; clicking opens a dialog box where you can use advanced layout features like those described on page 150.

Nested tables

A *nested table* is a table-within-a-table, or, more specifically, a table within a *cell* of another table. This feature, new to Word 2001, is a big deal when you use Word as a Web-design tool; you can make a table with four large cells taking up your entire page, for example, and put a smaller table in each one.

To create a nested table, click in the cell where you want the table to start, then click the Insert Table button on the Tables and Borders toolbar. Choose the number of rows and columns for your nested table as described on page 155. Now you can click in one of the nested cells and start typing. (Because the nested table must remain within one cell, either resize the cell to hold the nested table, or choose Table→AutoFit→AutoFit to Contents to allow the holding cell to expand.)

Merging and splitting cells

Merging and splitting are nothing more than ways of subtracting or adding columns en masse. Merging cells (or rows or columns) turns two into one, and pours their contents together. Splitting cells (or rows or columns) divides them, forcing their contents into the cell above or to the left of the split.

Start by highlighting the cells, rows, or columns you want to merge. Then choose Table→Merge Cells, or click the Merge Cells button on the Tables and Borders tool-

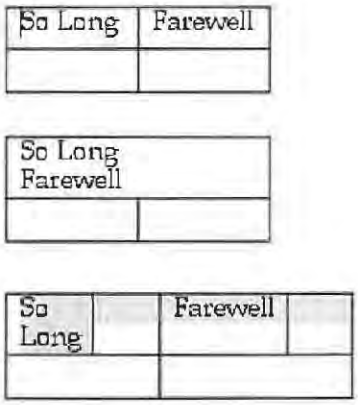


Figure 4-23:
Top: A 2 x 2 table. Middle: The same table after merging the top two cells.

Bottom: After splitting top two cells in two. If the "Merge cells before split" box had been checked in the Split Cells dialog box, Farewell *would immediately follow* So Long *in the upper right cell.*

bar; the selected cells instantly merge. Another way to proceed: Use the eraser tool to remove the line dividing two cells, columns, or rows; this way you can see directly how merging cells works.

The quickest and by far the most satisfying way to split cells is to draw new lines right smack across existing cells, using the Draw Table tool on the Tables and Borders toolbar.

If you need computer-aided precision, however, you can split cells, rows, or columns perfectly evenly by selecting them and then choosing Table→Split Cells (or click the Split Cells button on the Tables and Borders toolbar). In the Split Cells dialog box, choose the number of rows and columns you want *each* cell to be divided into.

Tip: You can also split a *table*, creating a blank line between its top and bottom portions—a great trick when you need to insert some regular text into the middle of it. Just click where you want the split and then choose Table→Split Table.

Converting text to a table

Sometimes you want to create a table from information that's already in Word, such as a table that some less-informed Word person (perhaps even a younger you) created using by trying to line up text with the Tab key. At other times, you've got a table and want to extract its information *without* maintaining its tableness (before importing into a page-layout program, for example, because page-layout programs don't understand Word tables). Word is happy to be your obedient servant.

The key to turning highlighted text into a table is the Table→Convert→Convert Text to Table command. Presumably, the text is a list, a number of words separated by tabs, or some other vaguely table-like blob of text. In the Convert Text to Table dialog box, start with the "Separate text at" settings. Choose the most logical place to divide your selected text into cells. If that's not a paragraph, comma, or tab, then click Other and press the key that represents your choice—Space bar, Return, period, and so on.

Word automatically suggests the number of columns you'll need to hold all the text; you can also specify the number of rows and columns you want to end up with. You also have the chance to use AutoFit (see page 158) and AutoFormat (page 160) features now—or you can save them for later. Click OK to begin the conversion.

If the table doesn't look quite as you had hoped, examine it and learn how Word interpreted your choices in the Convert Text to Table dialog box. Then press ⌘-Z to undo the conversion and try again with different selections. Or just reformat your table using the tools described in this section.

Converting a table into text

Converting a table to text is easier still. Click the table and choose Table→Convert→Convert Table to Text.

The only decision you have to make is how to divide the contents of one cell from the next—you don't want them all to run together, of course. You have a choice of paragraph marks (each cell's contents will become a new Word paragraph), tabs, commas, or any other character you enter in the Other box by pressing its key. If you choose tabs, the result is what you've heard described as *tab delimited text;* one tab separating each word or phrase that formerly occupied a cell on a single row, with a Return character at the end of each line.

Formulas in tables

Word is no Excel, but Microsoft is at least aware that you may want to do simple math from time to time. Fortunately, a table can carry out many of the most common spreadsheet tasks with the help of functions and operators. You can add up a column of numbers, for example, or have Word average them.

To add a column of figures, click in the bottom cell of the column (making sure that it's blank, of course) and click the AutoSum (Σ) button in the Tables and Borders toolbar. (See Figure 4-24, middle.) Your answer appears immediately, against a gray background (which doesn't print). This gray box tells you that you're dealing with a non-editable *field* (see page 213).

Note: This kind of field doesn't update automatically. If your table numbers change, you have to repeat the click on the AutoSum button (or click the field and then press F9).

For more complex formulas, click the cell where you want to place the results of your calculations and choose Table→Formula. Word's guess at what formula you're looking for already appears in the Formula window. If that's not right, press Delete, type an = sign to begin your formula, and build it with the following elements (see Figure 4-24):

- **Cell references.** Cells in Word tables are named the same way as in Excel spreadsheets, except that you can't see the row letters and column numbers. The upper-leftmost cell is A1.

  To refer to the entire column above the formula cell, use the expression *(ABOVE);* to refer to the entire row, use *(LEFT)*. For a *range* of cells (a block of them), use a colon to separate diagonal corners, such as A1:B2 to name a four-cell range.

- **Operators.** *Operators* are symbols like + for addition, – for subtraction, * for multiplication, / for division, and > for greater than. To see a list of all of them, type *Mathematical and relational operators* into the search box of Word's Help system. Using them in combination, you can set up a table cell to add, for example, sales tax (** 1.06*) to a subtotal column.

- **Functions.** Choose formulas from the "Paste function" list in the Table→Formula dialog box. These are the same as the Excel formulas described in Chapter 12.

- Click the arrow next to the **Number format** box to tell Word what you want the results to look like—AutoFormatted with a dollar sign, with commas, and so on.

Click OK to place the formula in the current cell; see Chapter 12 for much more on using formulas in Office 2001.

Sorting tables

If your table contains names, dates, or other listed items, you may want to put them in numerical or alphabetical order. To do so, click the table and choose Table→Sort.

In the "Sort by" box, Word helpfully suggests that you start with "Column 1," the first column on the left. All the columns in the current table are listed in a menu; click the arrows to choose one. For instance, if you want to sort in chronological order, choose the column that contains your dates. You can sort by Text (alphabetically), Number, or Date; choose the one that matches your data.

You can choose second and third sort columns as well. For example, after the first column sorts by date, you may want to sort names by alphabetical order *within* each date. Use the "Then by" boxes to set up these second and third internal sorts.

Click OK to begin the sort. (Note that you can't sort columns—only rows.)

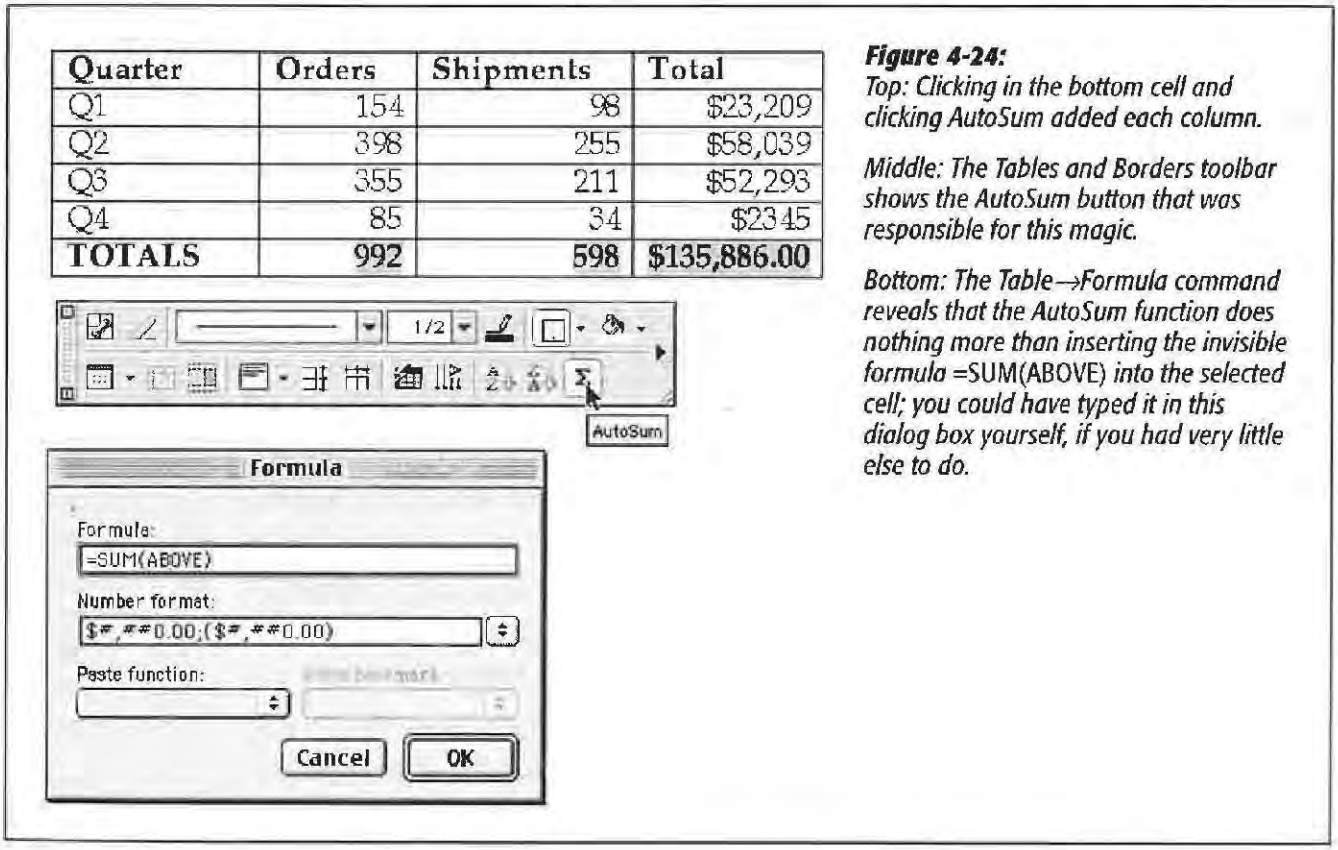


Figure 4-24:
Top: Clicking in the bottom cell and clicking AutoSum added each column.

Middle: The Tables and Borders toolbar shows the AutoSum button that was responsible for this magic.

Bottom: The Table→Formula command reveals that the AutoSum function does nothing more than inserting the invisible formula =SUM(ABOVE) *into the selected cell; you could have typed it in this dialog box yourself, if you had very little else to do.*

CHAPTER
5

Comments, Change Tracking, and Versions

Most of the time, the point of your work in Office is to create documents you'll eventually send or show to *other people*. (The exception: Keeping a diary in Word. You know who you are.)

In the modern working world, more and more people find it valuable to be able to mark up and revise such distributed documents. Thanks to the features described in this chapter, you, the original author, can look over other people's edits, incorporate them if you agree, or delete them if you don't. Whether you're working with one partner or an entire team of co-workers, Word's collaboration features make it easy to keep track of the various revisions and versions of the electronically transmitted documents that you'll inevitably create.

Comments

Often when reviewing someone else's document, you'll want to add comments without making them a part of the text itself. You'll have a query for the author, an idea, a suggestion, or a joke—the kind of thing that you'd write in the margin or on a sticky note if you were working on paper. Fortunately, the days of typing some boldfaced or bracketed comments directly into the text are over.

Adding Comments

To add just a single comment in Word, select the text that you're commenting on and then choose Insert→Comment—or press ⌘-Option-A. The comments pane opens at the bottom of the document window, as shown in Figure 5-1, with an insertion point at the beginning of a newly numbered comment marked with your initials. The text you originally selected now appears marked with a yellow high-

lighting pen. Type your comment; press F6, or click, to return to the main (upper) pane of the document window.

If you plan to make more than a few comments, however, you may find it more convenient to open the *Reviewing toolbar*, which lets you add a comment with a single click. After highlighting the text you'd like to praise, criticize, or deconstruct, proceed as follows:

1. **Choose View→Toolbars→Reviewing.**

   The Reviewing toolbar opens.

2. **Click the Insert Comment button on the Reviewing toolbar (see Figure 5-1).**

   Word splits your window, showing the Comments pane at the bottom.

3. **Type your comment; click back in the upper pane of the document window to return to it.**

   You can also press F6 to toggle between the two panes.

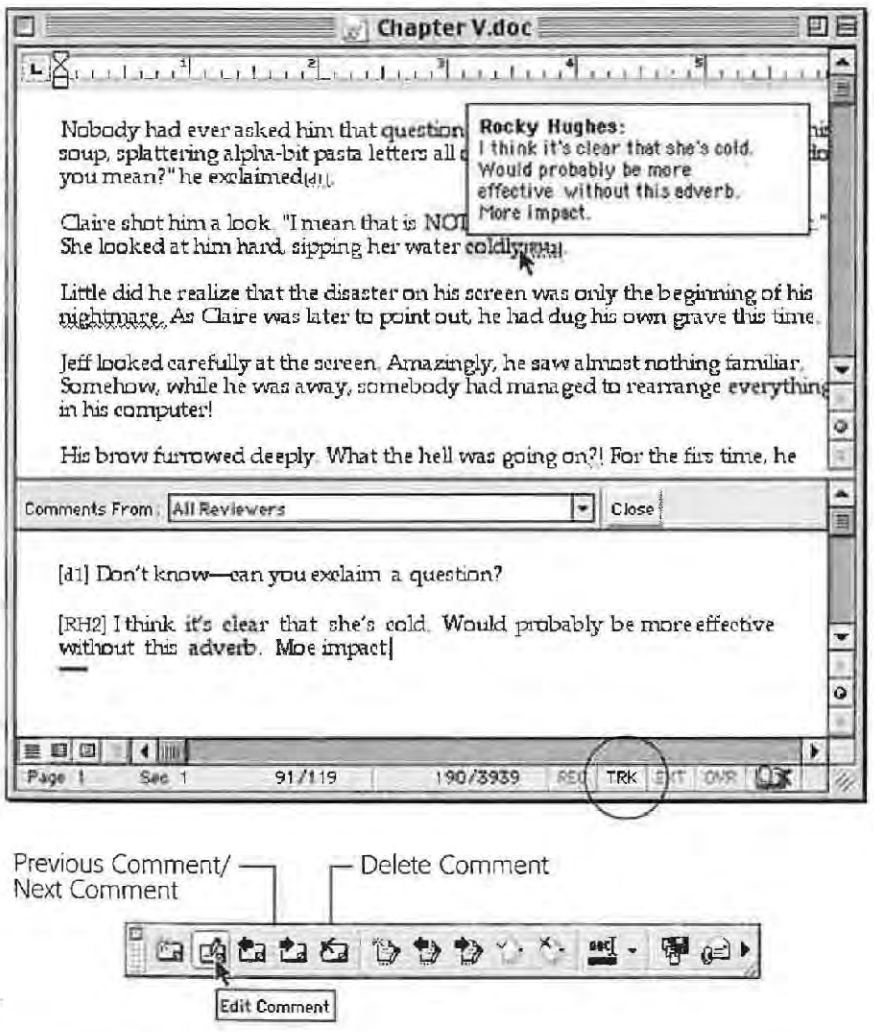


Figure 5-1:
Top: A document showing the highlighting that designates comments, as well as the split-window Comments pane. When you point to a highlighted phrase, the comment appears at your cursor tip in a balloon.

Circled at bottom: the TRK indicator on the window's status bar; double-clicking it represents the quickest way to turn change tracking on and off.

Bottom: The Reviewing toolbar. Among its charms is the Highlight tool (third from right), which superimposes electronic "highlighting marker" ink of a color you choose from the pop-up button.

4. When you're finished adding comments, close the Comments pane by clicking its Close button or by pressing Control-Shift-C.

Reviewing Comments

When you open a document with comments, the Comments pane doesn't automatically open. Instead, you see only the yellow highlighting that denotes a comment. Point to each without clicking to view the comment (Figure 5-1).

Note: In long and complex documents, these comment balloons can take a long time to appear, and sometimes never appear. Clicking in the window and then pointing the cursor again sometimes helps, as does turning off "Check spelling as you type" and "Check grammar as you type" (in the Edit→Preferences→Spelling tab). If you're getting nowhere making these balloons appear, just open the Comments pane, as described next.

If you like, you can open (or close) the Comments pane, where all the document's comments are listed sequentially. To do that, click the Edit Comment button on the Reviewing toolbar, shown in Figure 5-1, or choose View→Comments—or just double-click the bracketed initials of the person who made the comment the *comment mark*. Among other things, opening the Comments pane makes it easy to incorporate your editors' comments into the document itself, either by copying and pasting the text from the Comments pane or by drag-and-dropping it.

Tip: To delete a comment once you've read it, Control-click its yellow highlighting and choose Delete Comment from the contextual menu.

Navigating Comments

The main document pane and the Comments pane have independent vertical scrollbars. You can move around in each one using any of Word's usual navigation tools (see page 58). You can also use the Previous Comment and Next Comment buttons on the Reviewing toolbar (Figure 5-1), or the Object Browser described on page 22, to hop from one comment in the document to the next. (The main document window scrolls automatically to keep up.)

If the comments pane isn't visible, choose View→Comments, or double-click a comment mark, such as *[NB3]*. Now you can edit comments, yours or anyone else's, or click Delete Comment (on the Reviewing toolbar) to delete a comment completely.

Change Tracking

When it's time to mark up a document for revision, many people who otherwise use their Mac for everything still turn to paper, pencil, and highlighter. After all, marking up a printout lets you see both the original and your handwritten edits at a glance. And when you collaborate with others on a paper or project, you can use different colored ink to make it clear who wrote what.

The problem with the paper method is that you eventually have to retype the document, with all the edits, changes, and the results of the handwritten comments, into Word.

To avoid all that hassle, edit on screen in Word instead. Word lets you highlight with different colors and see at a glance who made what changes. Even better than paper, Word can automate the process of comparing and merging edited documents.

Getting Ready for Change Tracking

In order for Word's change tracking tools to work properly, you have to tell Word how you want your name to appear (when it's used to "sign" comments and changes) and how to display the changes.

Identify yourself

Especially if you're working with others, Word needs to know who you are so that your name can be attached to your version and your changes. To make sure that Word knows you correctly, choose Edit→Preferences→User Information tab and proceed as shown in Figure 5-2.

Setting Word to track changes: Method 1

Suppose you get a document from a colleague who's asked you to help clean up the prose. If you just dive right in, editing away, she'll have no way of spotting the changes

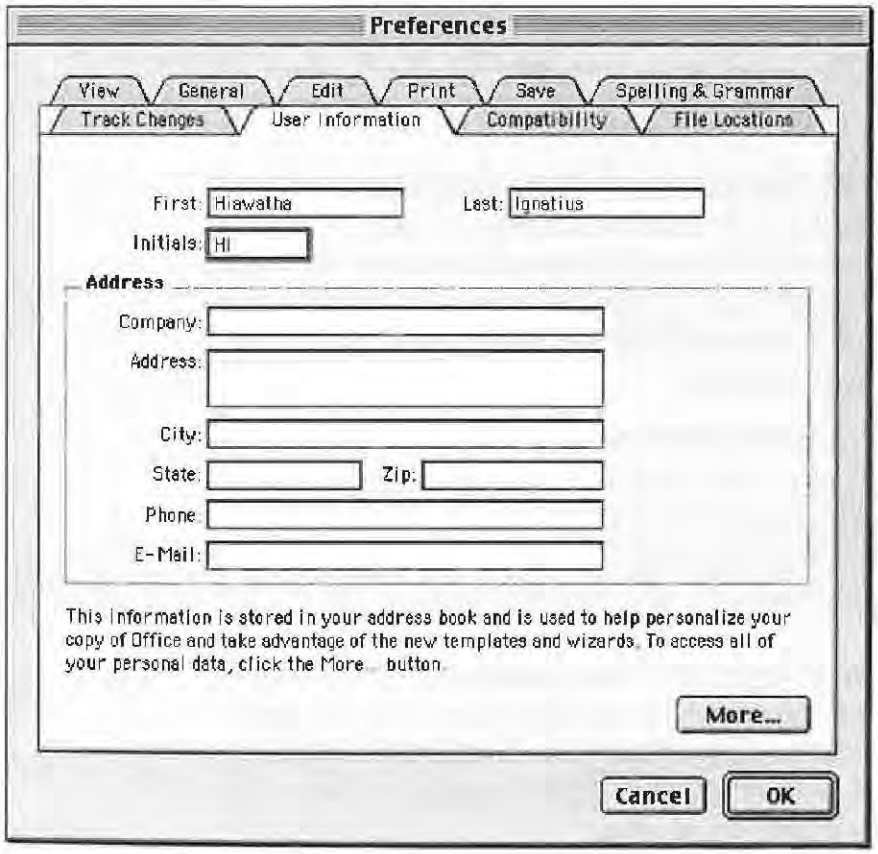


Figure 5-2: *Every time you annotate a document, yours or somebody else's, Word "signs" the comment, insertion, or deletion with your own name, as it should appear here in the Author box. Note, by the way, that this dialog box and your own address-book "card" in Entourage are linked; that is, when you change User Information, you also change your Entourage "this is me" card, and vice versa. (You tell Entourage which set of contact information is yours by opening the card with your info and choosing Contact→This Is Me.)*

None of this has anything to do, by the way, with the Author name that appears in the File→Properties→Summary tab, which Word pretty much ignores.

you made. When you intend to review a document, whether it's your own draft or a Word document given to you by someone else, you must ask Word to track your changes *before* making them.

By far the easiest way to turn on change tracking is to double-click the tiny TRK button at the bottom edge of your document window (Figure 5-1). The letters TRK turn black. From now on, Word will record any changes you make, as described in the next section.

Setting Word to track changes: Method 2

If you prefer the long way, however, you can turn on change tracking and gain some additional options:

1. **Choose Tools→Track Changes→Highlight Changes.**

   The Highlight Changes dialog box opens, as shown at bottom in Figure 5-3.

2. **Turn on "Track changes while editing."**

   You also have the option to turn "Highlight changes on screen" on or off. If it's *off*, you won't see any special markings as you edit the document; the usual color-

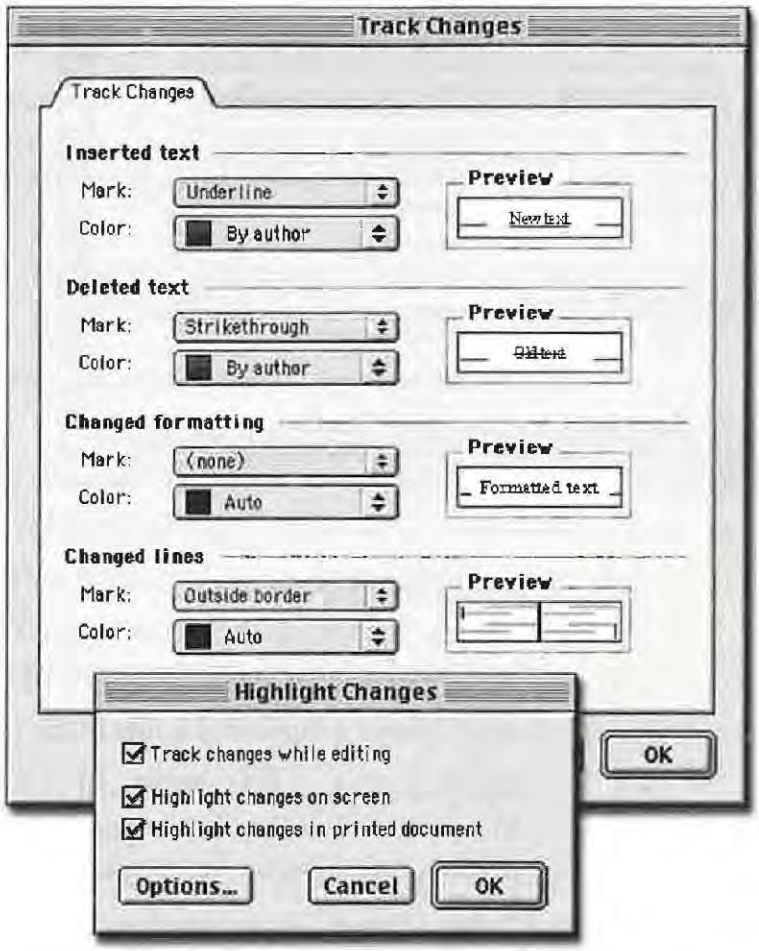


Figure 5-3:
Top: Using these pop-up menus, you could choose, for example, "none" for "Deleted text" so that it will disappear instead of being struck through, and choose bold instead of underlining for "Inserted text" for a less cluttered look. The pop-up menus offer different marks for each context.

Although you can also choose different colors for inserted and deleted text (instead of "By author"), unless everyone in your work group can agree on a different color scheme, it's probably best to stick with Word's color choices. Having different editors in the same document can get confusing, and Word does a great job of keeping track of the colors.

Bottom: Turn off "Highlight changes in printed document" dialog box to hide all your changes during printing. That way, you can have a hard copy of the document in its original state even after you've made changes.

ing and strikethrough annotations (Figure 5-4) won't appear. You'll feel as though you're editing a Word file *without* change tracking turned on.

Behind the scenes, though, Word will indeed record every change you make; at any time, you or a collaborator can choose Tools→Track Changes→Highlight Changes and turn "Highlight changes on screen" *on* again to see the changes.

Now proceed as described in the following paragraphs.

Making Changes

After turning on change tracking as described above, now you can edit the Word document as usual. You can use any of the tools described in Chapter 2, including inserting text, formatting it, and deleting large blocks of text or even entire pages. Word keeps track of it all, as shown in Figure 5-4.

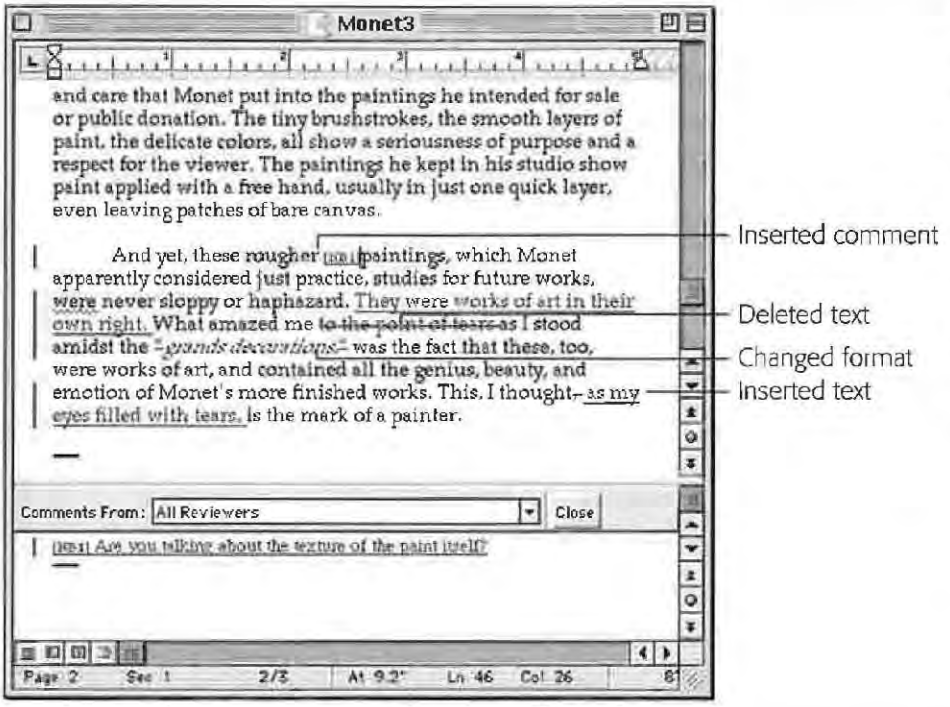


Figure 5-4: *If your work comes back to you appearing heavily marked up by your editors, don't feel too depressed; remember that every proposed replacement text results in two colorful blotches on the screen–one passage with a line through it, the other appearing as an insertion.*

Changing tracking options

The Track Changes dialog box in Figure 5-3 and the sample document in Figure 5-4 show Word's default settings for showing on-screen changes:

- Word places a thin vertical line in the margin next to *any* kind of change.
- Text you've inserted is underlined and color-coded by author. Text typed by the first person to review the document appears in red; the second in blue, the third in pink, and so on, for up to eight authors. Then Word starts over again with red.
- Deleted text displays strikethrough style, ~~like this~~, *and* is color-coded by author.

- Formatting changes (to boldface or italic, for instance), don't leave any visual trace except for the thin margin line. (You can change this setting, however, as described next. In Figure 5-4, for example, this setting was adjusted so that reformatted text would show up in a different color.)

You can change these options by choosing Tools→Track Changes→Highlight Changes, and then clicking Options, as described in Figure 5-3.

Reviewing Changes One by One

When a Word document comes back to you, after having been edited using the tracking feature, it's very easy for you to review the changes one by one, accepting or rejecting each proposed revision, until you wind up with a normal, unmarked-up document. (If there have been multiple authors or editors, see "Merging Tracked Changes" below before proceeding.)

To get started, open the document or merged document.

Reviewing changes: Light edits

If there's only light editing, the easiest way to approve or reject each change is simply to Control-click the changed text; from the contextual menu, choose Accept Change or Reject Change (see Figure 5-5). When you accept a change, Word removes the color and marking and turns the change into normal text. When you *reject* a change, Word removes the marked or colored text and restores the original.

Reviewing changes: Heavier edits

If you see a lot of changes to be approved, you may as well pull out the heavy artillery—the Reviewing toolbar:

1. **Choose View→Toolbars→Reviewing.**

   The Reviewing toolbar appears.

2. **Click at the beginning of the document; click the Next Change icon on the Reviewing toolbar.**

   Word scrolls to the first change and highlights it. Look over the suggestion; decide whether, in your estimation, it's an improvement or not.

3. **Click the Accept Change icon (with the checkmark) or the Reject Change icon (with the X) on the Reviewing toolbar.**

   Again, when you accept a change, Word turns the change into normal text. When you reject one, Word restores the original.

   If you reconsider after accepting or rejecting a change, press ⌘-Z for Undo.

4. **Click the Next Change icon and continue the process.**

   If change tracking is turned on, any new editing you do will be highlighted on the screen with your author color. To eliminate this during your last pass, click

the Track Changes button on the Reviewing toolbar to turn it off, or double-click the TRK indicator at the bottom of the document.

5. **When you get to the end of the document, and have missed reviewing some changes, Word will ask if you want to go back to the beginning. Click OK.**

Accepting or Rejecting All Changes

If you trust your editors completely, you can accept or reject *all* changes in a document, all at once. You don't even have to look at them first (although you should, unless you're sure your editors are *much* smarter than you are). Word also makes it possible to view the document as a whole with or without all changes.

1. **Choose Tools→Track Changes→Accept or Reject changes.**

   The dialog box shown at bottom in Figure 5-5 opens.

2. **Choose a way to view the document.**

   The dialog box now on your screen is small for a reason: It's designed to be moved aside, so that you can survey the document before making the radical move of accepting or rejecting all of the edits that have been made to it.

   To help you with this pursuit, you're offered three radio buttons. They let you see the document with all changes highlighted (as shown in Figure 5-4); as if all changes were accepted ("Changes without highlighting"), or in its original state before any changes were made. These humble-looking radio buttons are one of the most powerful aspects of the change tracking feature.

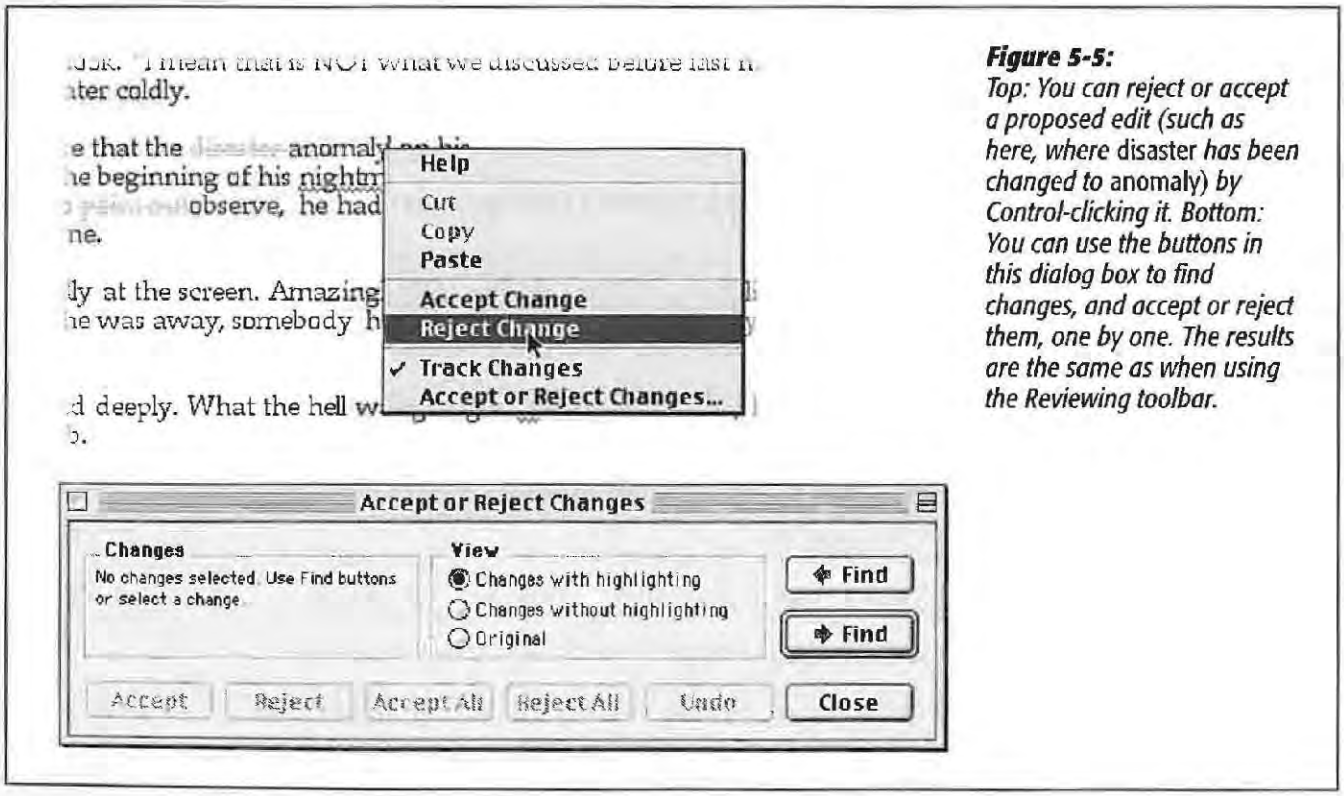


Figure 5-5:
Top: You can reject or accept a proposed edit (such as here, where disaster *has been changed to* anomaly*) by Control-clicking it. Bottom: You can use the buttons in this dialog box to find changes, and accept or reject them, one by one. The results are the same as when using the Reviewing toolbar.*

3. **If you want to go ahead and make all proposed changes, click Accept All. To return the document to its original condition, click Reject All.**

   Word asks if you're sure before proceeding. Even so, after you accept all or reject all, you can change your mind by clicking Undo.

4. Click Close.

Merging Tracked Changes

One of the most common scenarios for using change tracking is to email or otherwise transfer the same original document out to several reviewers, each of whom peppers it with edits and comments. If they all came back on paper, it would be quite a challenge to sort through and incorporate all the good ideas.

In Word, it's easy to merge the edited documents together, one by one. To do so, open the original file—or any one of the edited documents—and proceed as follows:

1. **Choose Tools→Merge Documents.**

   Word opens the Choose a File dialog box, where you'll choose the first file to merge into the currently open document. If you're not sure where the document is saved, but have an idea of the file name or some words found in it, click Find File to have Word search for it.

2. **When you find the file, double-click it.**

   Word begins the merging process. When it's over, the original document contains both its own tracked changes *and* those merged in from the second document. The changes from different authors appear in different colors.

3. **If you have more files to incorporate, repeat steps 1 and 2.**

   When all the documents are merged in, place your insertion point at the beginning of the document and review the changes as described on the preceding pages.

Comparing Documents

The merging process described earlier in this chapter works well if *all* documents have been edited using Word's change-tracking feature. But often enough, you wind up with two drafts of a document, one of which has been edited (by you or somebody else). Word's Compare Documents feature can help you see where edits have been made—a feature that has saved the bacon of more than one lawyer in back-and-forth contract-document negotiations.

To use it, round up both the edited version and your original or master copy and proceed as follows:

1. **Open the changed copy of the document. Choose Tools→Track Changes→Compare Documents.**

Word opens the Choose a File dialog box. Here's where you select the *original* document, the one to which you want to compare the edited version. The original could be the one that's never been edited, or one that's been edited with change tracking or even merged. Just make sure that you've reviewed it and accepted or rejected all tracked changes in it before you begin the comparing process.

2. **When you locate the original version of the document, double-click it.**

   Word compares the two documents and shows the differences as tracked changes, in the first document you opened. In other words, text that's in the edited version but *not* in your original appears in color and underlined; text that somebody deleted from the edited version appears with strikethrough lettering.

If there were already any tracked changes in either of the documents, Word ignores them and gives priority to the actual, unmarked text. If either of the documents has tracked changes, Word asks before proceeding with the comparing process.

UP TO SPEED

Preparing to Send a Reviewed Document

If someone *else* will be merging the reviewed documents, there are a few things you can do to make his job easier when you send your edited copy:

Make changes visible. Choose Tools→Track Changes→Highlight Changes, or click Highlight Changes in the Reviewing toolbar, before you send your document off. That way, the recipient can see immediately that it's been edited.

Change the name. Add your initials to the file's name in the Finder, for example, so that it won't be confused with the original during the merging process.

Send the most recent version. As you edit the document, you can freeze it in time by using Word's *versioning* feature (described later in this chapter). When you're ready to return your final edits, choose File→Versions and open the version that you want to submit. Choose File→Save As and save it as a separate document under a new filename before you send it off. You still have a record of all versions you created, but your recipient only gets the one you intended to send out. (What's more, using the Save As command produces a much smaller file.)

Versioning

The File→Versions command performs a kind of temporary Save: it creates a snapshot of your document at a moment in time, without actually creating a new document. All versions of a document are stored in the same file on your hard drive with the same file name; even though it may contain eleven different drafts, you still see only a single icon in the Finder.

When you save versions, in other words, you create listings in the Versions dialog box, not separate document files. Thus, you can save as many versions as you like without losing them or creating a mass of documents on your hard drive.

Saving a Version

Suppose you open your first draft of a document. You're about to do some heavy editing, but you're not sure you're going to like your own new direction. By saving the current draft as a version, you'll always be able to return to the document the way it used to be.

To save a version of the document you're working in:

1. **Choose File→Versions.**

   The Versions dialog box opens, as shown in Figure 5-6.

2. **Click Save Now.**

   The Save Version dialog box opens. Type some comments that will help you remember what the version is all about (such as *Halloween XXV: Romantic comedy approach*) then click OK.

You have just saved a version.

You can now forget all about the Versioning feature. To save, choose File→Save (⌘-S) as usual. When you open a document that has versions, Word always shows you the latest draft.



Figure 5-6:
Top: You can see the first few words of your comments in the Versions dialog box. Double-click one of the drafts listed to go back in time to that previous version.

Bottom: To see the full comment, click View Comments.

Opening a Version

To return to a particular version, first open the document. Then choose File→Versions. Double-click the name of a version in the list. To help you keep straight what's going on, Word opens the selected draft in a separate window. Both the latest document and your selected earlier version are now visible, their windows tiled one above the other; the date and time stamp in the window name helps you identify the earlier version.

Spinning Off a Version

The beauty of saving lots of versions is that you can open any one of them and save it as a separate document any time. To do so, open a version as described above. Click the version's window and choose File→Save or Save As (or, if you've turned off the Mac's own F-key feature described on page 60, press F12). The Versions dialog box closes and a standard Save dialog box opens, where you can choose a name and location for the new document.

Deleting a Version

If you find you have too many confusing versions in the Versions dialog box, you can delete some of them. To delete a version, select it and click Delete. Word asks if you're sure (you can't undo this deletion). Continue selecting and deleting as many versions as you wish.

Click OK to exit the Versions dialog box.

GEM IN THE ROUGH

Automatic Version Saving

You don't have to remember to save a version every time you cultivate a new draft of your document; Word can do so automatically.

Just choose File→Versions, and then turn on "Automatically save a version on close" in the Versions dialog box (Figure 5-6). Click OK. From now on, Word saves a new version every time you close the file—a logical place to do so, preserving each session's editing efforts as a separate draft. (You don't have the opportunity to name each such automatic draft; Word calls each one "Automatic version," although it does date-stamp each one in the Versions dialog box.)

CHAPTER 6

Advanced Word Processing

A Word document, like a book, is only as good as the sum of its parts. Chapters and a table of contents, an index, footnotes, and cross-references all work together to help orient your audience in the material. No matter how important the information or how brilliant the fiction, if the words are presented as pages and pages of plain text, your reader is going to get lost and maybe even give up. You need to break it up into parts, and the parts need to work together. It's all about the packaging.

This chapter takes you deep into the woods of Word's power-user features, well off the beaten path trod by millions of everyday, casual users. The material you'll find here is at your disposal when you need to write a dissertation, full-length book, or another complex, structured document.

Headers and Footers

A header or footer is a special strip that can show the page number—as well as your book title, chapter title, name, date, and other information—at the top or the bottom of every printed page in your document (or one section of it).

Creating Headers and Footers

Word treats the header and footer as a special box at the top or bottom of the page. To view these special text areas, choose View→Header and Footer; dotted lines appear around the header and footer areas of your document, and the Header and Footer toolbar appears, as shown in Figure 6-1; the rest of your document fades to gray. (If you find even that faded representation of your body text distracting, hide it by clicking the Show/Hide Document Text icon on the Header and Footer toolbar.)

Tip: If you're working in Page Layout view, you don't have to bother with the View→Header and Footer command. Just move the cursor to the top or bottom of the page; when it takes on this shape, double-click. The header/footer dotted lines appear.

Fill your header or footer by typing in it and clicking icons in the Header and Footer toolbar. For your convenience, Word places a centered tab stop in the middle of the typing area, and a right-aligned tab stop at the right. You can choose View→Ruler and adjust these tab stops, of course (see page 115); but they're especially handy when you want to produce a header like the one shown in Figure 6-1:

1. **Press Delete.**

   You just backspaced over the tab that puts your insertion point, by default, in the middle of the header area, aligned with the center tab. By pressing Delete, you've "backed up" to the left margin.

2. **Type the chapter title.**

   After typing *Chapter 1: The Beginning,* you can highlight it and format it; for example, you may italicize it by pressing ⌘-I.

3. **Press Tab.**

   The cursor jumps back to the middle of the header or footer.

4. **Insert the date.**

   You might do so by clicking the Insert Date icon on the toolbar, as shown in Figure 6-1. (Word inserts the date as a *field,* which is continuously updated; whenever you print or send this document, the date will be current.)

5. **Press Tab.**

   Now your cursor is aligned at the right margin.

6. **Type *Page,* and a space; insert the page number by clicking the Insert Page Number icon on the toolbar (Figure 6-1); type *of;* insert the total number of pages by clicking the Insert Number of Pages icon.**

   (If you need help identifying an icon on this toolbar, point to it without clicking; as usual in Office 2001, a yellow tooltip balloon appears to identify it.)

   Word inserts placeholder fields (indicated by a nonprinting, gray background) into your header or footer, so that it says *Page 3 of 15,* for example. When you print or scroll through your document, you'll see that each page is correctly labeled in this way. (Of course, most people don't use the "Page X of Y" notation; if you want just the page number to appear, just click the Insert Page Number icon and be done with it.)

Tip: If, at this point, you want more control over the page numbering, click the Format Page Number button on the Header and Footer toolbar, as shown in Figure 6-1. In the dialog box that appears, you can specify how you'd like the page numbers to appear (*a, b, c,* or in Roman numerals, or with chapter number included). You can also indicate that you'd like them to begin with some number other than 1, which is great when your document is the *continuation* of some document you've already printed.

7. **Double-click the dimmed body portion of your document (or click the Close button on the toolbar) to exit the header/footer editing area.**

Tip: Headers and footers don't appear or print when you save your Word files as Web pages. But leave them in—they will appear and print if you go back to using the same file as a Word document.

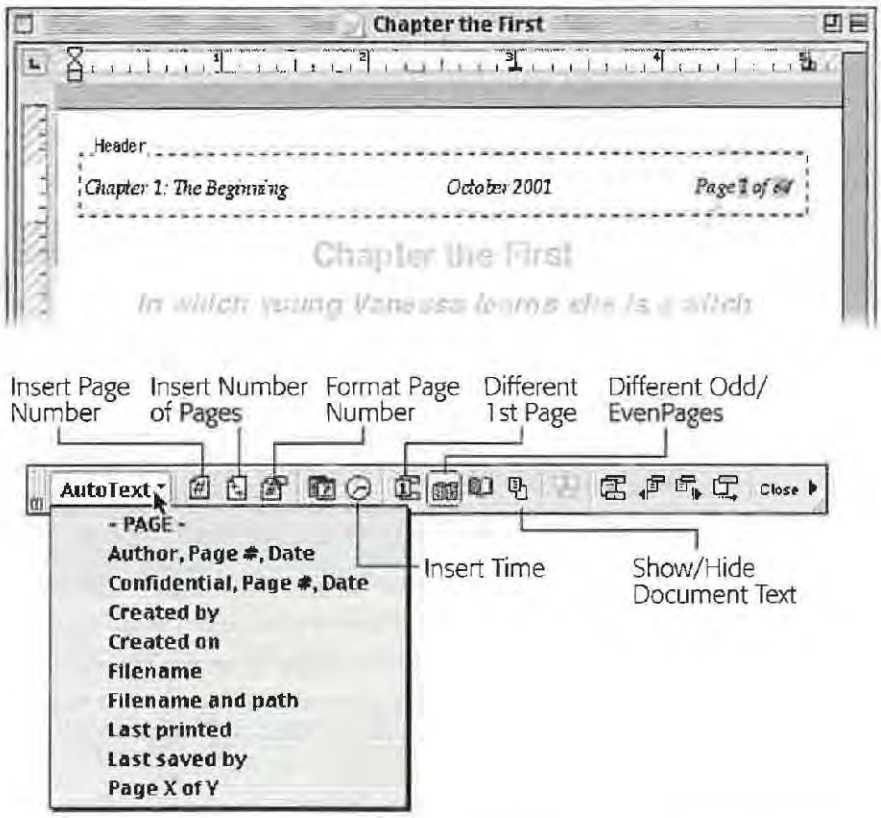


Figure 6-1:
Top: When you're editing your header or footer, the main part of your document appears in gray, and a dotted line appears around the header or footer area.

Bottom: The most useful buttons on the Header and Footer toolbar are shown here. To insert AutoText items into a header or footer, choose them from the AutoText menu on this toolbar; Word will keep them automatically updated. To return your document to its normal condition, choose View→Header and Footer again, or click Close on the Header and Footer toolbar.

Positioning headers and footers

By default, headers and footers extend from the right margin to the left margin. To make them wider than the text and extend them into the margins, give the header or footer a *negative indent* (see page 114).

To move a header or footer higher or lower on the page, click in it and choose Format→Document Layout→Margins tab; adjust the numbers in the "From edge" boxes. (Higher numbers move the header or footer text closer to the middle of the

page.) Alternatively, you can adjust it visually by clicking in the header or footer and then dragging its margin up or down in the vertical ruler at the left side of the page; this adjusts the distance between the header or footer and the body of the text.

Title pages

If your term paper has a title page (featuring the name of the paper centered on an otherwise blank page), it would look a little silly if the paper's title appeared a second time at the bottom.

Fortunately, you can give your first page a different header or footer—or none. To do so, go to the first page of your document. Choose Format→Document→Layout tab, click "Different first page," and click OK. (Alternatively, click the Different First Page button on the Header and Footer toolbar.)

Tip: The "first page" setting applies only to the *section* that contains your cursor (see page 125). In other words, you can control the header/footer's appearance independently for each section in your document.

Now you can edit and format the unique header and footer for your first page, or just leave them blank. (You can also apply this technique to the first page of each *section* of your document; see page 125 for more detail on sections.) If you haven't done the header and footer for the rest of the document, click the Show Next button on the Header and Footer toolbar; Word takes you to the second page, where you create the headers and footers for the rest of the pages.

Bound-book pages

If your document is going to be bound like a book, you'll probably want different headers and footers on odd and even pages, exactly like those on these book pages (book name on left-side pages, chapter name on right-side pages).

To create these mirror-image headers and footers, choose Format→Document→Layout tab, click "Different odd and even," and click OK. (Alternatively, click the Different Odd and Even Pages icon on the Header and Footer toolbar.) Then edit the headers and footers for the odd and even pages in your document; when you do so on *any* odd or even page, Word applies your changes to *all* of them.

Different headers (and footers) for different sections

If you've divided your document into sections (page 125), you can have different headers and footers for each section—a very common technique when you want to break your document into chapters.

By default, all headers and footers in a document are the same, even when you insert section breaks, so the trick is to *sever* the connection between the header and footer in consecutive sections. For instance, if you want a different header in each of your document's three sections, go to a page in the *second* section and choose View→Header and Footer. Click in the header and click the Same as Previous icon on the Header and Footer toolbar. (This button breaks or rejoins the header/footer

connection between each section and the one before it. You can use it to restore the header and footer connections if you change your mind, and once again make them uniform throughout the document.)

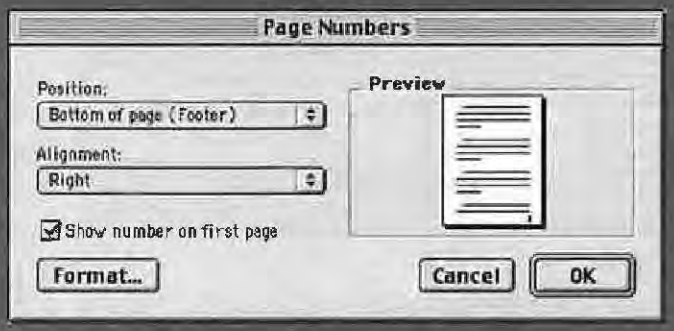
Repeat the process for the third section, and so on.

UP TO SPEED

Page Numbers: The Other Method

Page numbers are the most popular use of headers and footers. That's why Word gives you buttons for adding and formatting them right on the Header and Footer toolbar (see Figure 6-1).

But there's an even easier way to number your pages in Word: just choose Insert→Page Numbers. The Page Numbers dialog box opens, as shown here. Watch the Preview window change as you set up the controls you find here, such as Alignment (which includes Inside or Outside, for use when you're setting up bound-book pages); "Show number on first page" (turn it off if your document has a title page); and the Format button, where you can specify what kind of numbering you want (1, 2, 3; i, ii, iii; a, b, c; and so on).



When you turn on "Include chapter number," Word includes the chapter number along with the page number, in a "Chapter 1, Page 1" scheme. In the "Chapter starts with style" menu, you choose the heading *style* that you used for the chapter number (you have to use one of Word's built-in headings—or a style based upon one of them—to make this numbering feature work). Then, choose a separator (a hyphen, dash, or whatever).

On the "Page numbering" panel, choose "Continue from previous section" if you've divided your document into sections (see page 125), and want all the pages numbered successively. Otherwise, use the "Start at" box to tell Word what number the first page starts with.

Footnotes and Endnotes

Footnotes, as any research scholar can tell you, are explanations or citations located at the bottom of each page, referred to by a small superscript number or symbol in the main text. *Endnotes* are similar, except that they're listed together in a clump at the end of the document, instead of on each page. Word can handle each kind of annotation gracefully. Here's how to go about inserting a footnote or endnote into your document.

1. **Click at the exact point in your document where you want it to appear; choose Insert→Footnote.**

   The Footnote and Endnote dialog box appears, proposing a footnote. (Just press ⌘-E, or click Endnote, if you want an endnote instead.)

   If left to its own devices, Word will number your footnotes sequentially (1, 2, 3...); if you'd rather use a symbol (such as an asterisk), click "Custom mark" and

type the desired symbol, or click the Symbol button and choose one from the palettes.

2. **If you want nonstandard numbering, click Options.**

   If you're some kind of radical, you may prefer Roman numerals, letters, symbols, or something else. In the resulting dialog box (see Figure 6-2), you can also choose where to place footnotes and endnotes: at the bottom of the page or immediately after the text, for instance. Click OK to close the box.

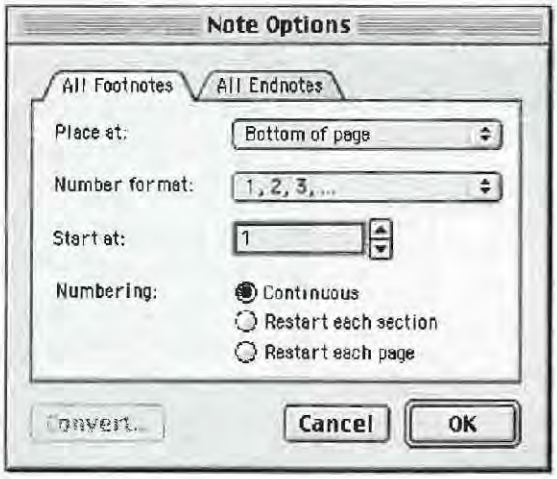


Figure 6-2:
The radio buttons on the All Footnotes and All Endnotes tabs let you choose where to start and restart the numbering. For instance, if you choose "Restart each page," the first footnote on each page will be marked "1."

3. **Click OK to close the Footnote and Endnote dialog box.**

   Word opens up a pane at the bottom of the document window where you can type the actual text of the note (Figure 6-3). (To toggle between displaying and hiding the note pane in Normal view, choose View→Footnotes; in Page Layout view, no such shenanigans are necessary—the notes simply appear at the bottom of the page. You can edit them directly.)

   Word usually draws a horizontal line, a third of the way across the page, above your footnotes. If you'd like to edit this line to say, for example, "NOTES:" instead, choose Footnote Separator or Endnote Separator from the Footnotes pop-up menu (in the bar at the top of the note pane). Edit the text (or line) that you find there; you could even make the line a different color, for example, or delete it entirely by clicking it and pressing Delete.

4. **Type your footnote.**

   A footnote is often a *citation*—a reference to a specific book or article that provided your information. One standard format for citations is called MLA (Modern Language Association) style, and it looks like this:

   Onoto Watanna, *A Japanese Nightingale* (New York: Harper & Brothers, 1901) 41.

The definitive guide to correct MLA-style footnotes is the *MLA Handbook for Writers of Research Papers* (for high school and undergraduate students) or the *MLA Style Manual and Guide to Scholarly Publishing* (for graduate students, scholars, and professional writers); more information is at *www.mla.org*.

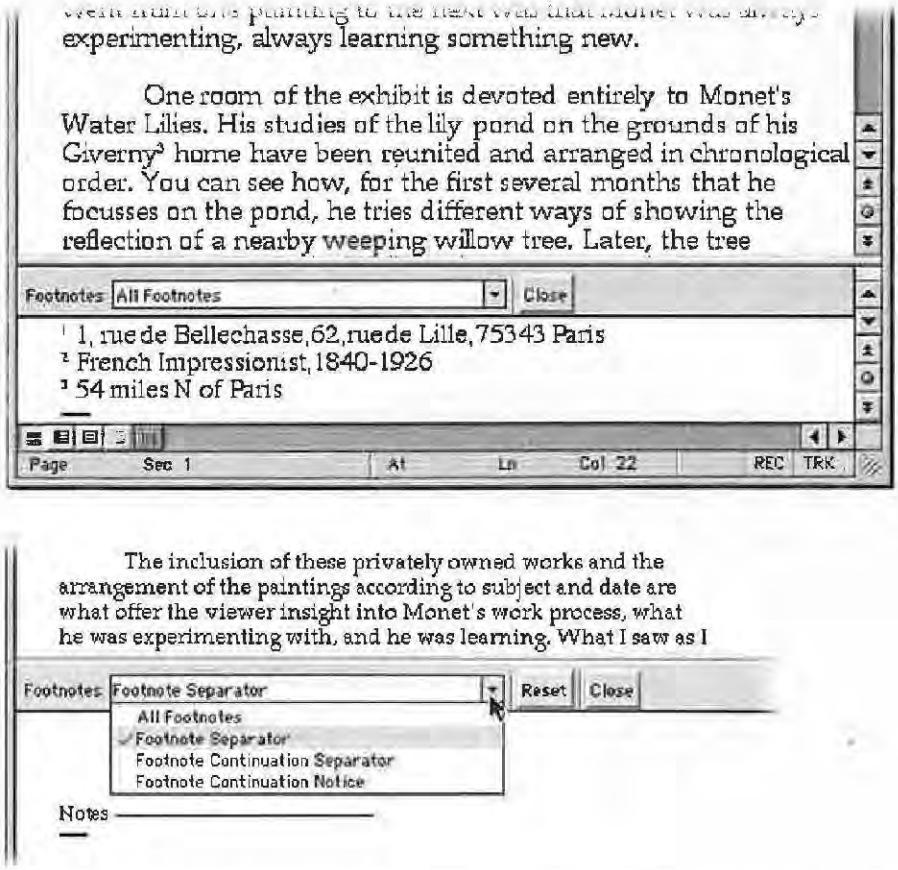


Figure 6-3:
Top: In Normal view, you can edit your footnotes or endnotes by choosing View→Footnotes; feel free to drag the gray divider bar up or down. (In Page Layout view, the footnotes and endnotes are readily visible; you can edit them directly on the page.)

Bottom: The gray divider bar contains a pop-up menu that lets you specify what you want to see and edit: the separator line, the separator text itself, footnotes, or endnotes.

5. **Repeat from step 1 to add more footnotes, or click Close to get the Footnotes pane out of your way.**

   Each footnote is marked in your text by a small number or symbol, as you specified it. At any time, you can jump back and forth between the footnote symbol (in the main window) and the Footnotes pane by pressing F6.

Tip: You can combine footnotes and endnotes in a single document. For example, footnotes might contain explanations and elaborations of text, while endnotes might contain citations.

Deleting Footnotes and Endnotes

To remove a footnote or endnote, select the superscript number or symbol in your text (not in the Footnote pane; you'll just get an error message) and press the Delete key. Word asks if you want to delete the entire note or just reformat it. Click Delete.

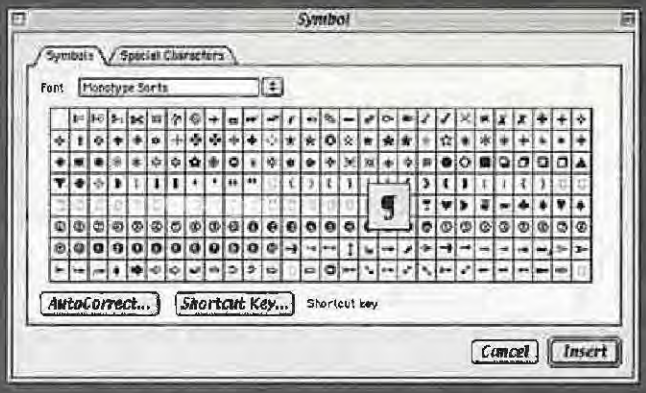
Tip: You can convert footnotes to endnotes, or vice versa—a blessing for the indecisive. Choose View→Footnotes, choose All Footnotes or All Endnotes from the pop-up menu in the gray divider bar, select the notes you want to convert, and Control-click the selection. Choose Convert to Endnotes or Convert to Footnotes from the contextual menu.

Need Sidebar Type

Inserting Symbols

You can use hundreds of different symbols in Word. The following terms, for example, all depend upon symbols for correctness and clarity: 98.6°, Oscar™, ¿Que pasa?, and so on. Larger symbols called dingbats let you do cool things like putting a ☎ next to your phone number. High-tech dingbats, like those in Microsoft's Webdings font, come in handy on Web pages, such as ✉ to indicate an email link.

To enter the wonderful world of symbols, choose Insert→Symbol. The Symbol dialog box appears, offering a palette of symbols in the Symbol font. Drag your cursor across them as a magnifying glass for a closer look.



If you don't see the symbol you're looking for, choose another symbol font from the Font menu. If you want a standard typographical symbol, such as © or ®, choose "Normal font" from this pop-up menu (or just click the Characters tab, where you'll find a cheat sheet of such common symbols and the keystrokes that produce them).

When you've finally highlighted the doohickey you're seeking, click Insert (or press Return) to place it into your document at the insertion point.

If there's a symbol you wind up using frequently—you're a Valentine's-day consultant, for example, and you use the ❤ symbol about 20 times a day—you can set it up for easier subsequent access in either of two ways.

First, you can assign a keyboard shortcut to it. To do so, click the ❤ while in the Symbol dialog box, and then click Shortcut Key. In the resulting dialog box, press the keys you'll want to trigger this symbol (Control-H, for example). If you chose a key combination that's already assigned to another Word function—which is fairly likely—you'll just get an alert sound. Keep trying until you stumble onto an unassigned combination. (The keystroke will become part of the Normal template [see page 188], and so it'll work in all documents based upon it.)

But you may find it easier to use a word or a letter combination to insert a symbol. For instance, if you want to appear every time you type *Apple*, or a code like *qqqq* to type your favorite dingbat, say ❦, click the symbol and then click AutoCorrect. The AutoCorrect dialog box opens (see page 84), showing your chosen symbol in the Replace With box; type the word or code you'll want to trigger the appearance of the symbol (four letters or longer) and then press Return twice.

Controlling Footnote Flow

If your footnotes are too long to fit on their "home" page, they flow into the footnote section of the next page. (Endnotes flow to the *top* of the following page.) To be thoughtful of your reader, you may want to add something to the separator line—

"Continued on next page," for example. Word, equally thoughtful, lets you do exactly that.

Open the note pane as shown in Figure 6-3 and choose Footnote (or Endnote) Continuation Notice from the Footnotes menu. Type your thoughtful text, ("See next page," or what have you), and click Close.

Tip: Word puts endnotes immediately after the document or section's text, according to your specification. To put them on a separate page for printing, click in front of the first endnote and choose Insert→Break→Page Break. If you have a lot of endnotes, you may want them to start on a new page to make it easier to check them against your paper.

Line Numbers

If you're a lawyer, Bible scholar, or aspiring Hollywood scriptwriter, you're already familiar with *line numbering:* tiny numbers in the left margin every five or ten lines (see Figure 6-4). But even in everyday business, they're occasionally useful; you could email a press release to your boss and ask, "Let me know if I come on too strong in lines 5–8," for instance.

Line numbers show up only in Page Layout view (choose View→Page Layout). To add them to your document, select the text whose lines you want numbered. If it's a single section (see page 125), for example, click anywhere in that section; if it's the whole document, choose Edit→Select All or press ⌘-A. If you're at the start of a new document and want to start numbering immediately, read on.

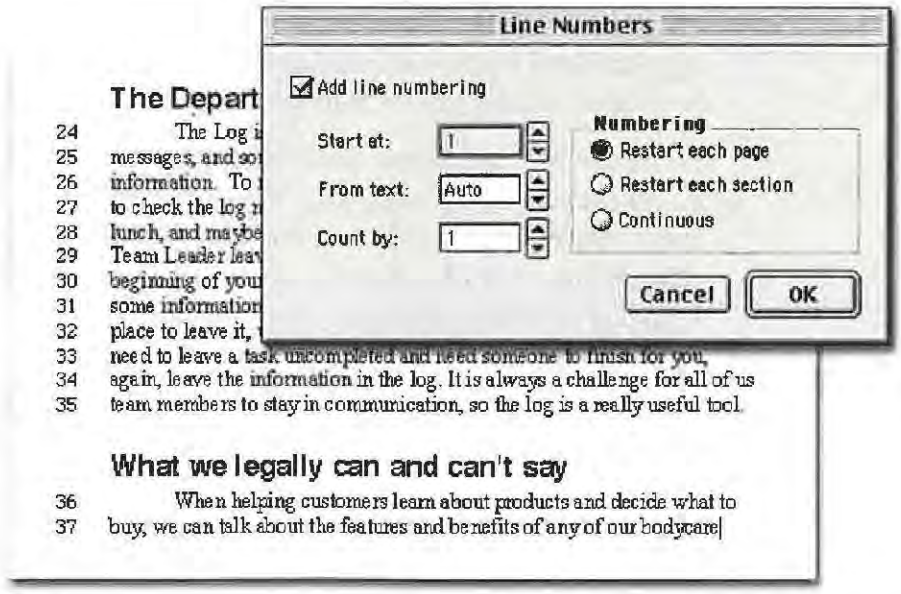


Figure 6-4:
Top right: The Line Numbering dialog box.

Lower left: You can tell Word not to number specific paragraphs by highlighting them, choosing Format→Paragraph→Line and Page Breaks tab, and turning on "Suppress line numbers." Here, for example, that option was turned on for the Heading style, so that headings don't get numbered automatically.

Tip: By choosing Format→Paragraph→Line and Page Breaks tab and turning on "Suppress line numbers," you make Word skip over the selected paragraphs in its numbering. Keep this checkbox in mind when defining a style, too; you can use it to ensure that your captions, for example, are *never* numbered.

Choose Format→Document→Layout tab. If you've selected text as described above, choose "Selected text" from the "Apply to" menu at the right; click Line Numbers. Turn on "Add line numbering" and set the following:

- **Start at** tells Word what line to start counting with. Select 2, for instance, if you want Word *not* to include the heading at the top of the page.
- **From text** is the distance from the left margin of the text. **Auto** is a good start unless a certain distance has been specified.
- **Count by** tells Word: "Show numbers only on every ___th line." The most common settings are 5, 10, and 20.
- **Numbering.** *Continuous* numbering begins at the first line and goes all the way to the end of the document. You can also tell Word to start over on each page, or after each section break.

To get rid of line numbers, just select the text again, choose Format→Document→Layout tab, and turn off "Add line numbering."

Templates

This chapter may cover the most advanced features of Microsoft Word, but nothing you've read so far can touch the complexity of *templates*, the system of special files that Word uses to store your keystrokes, AutoText entries, styles, and dozens of other preference settings. There are two kinds of templates—global and document—and you can load more than one at once, causing them to interact in complex ways, sometimes making all of your text switch to radically different formatting.

If you use Word as a basic word processor, you can safely ignore templates. Millions of people use Word every day, in fact, unaware that lurking behind the scenes of every single document is one critical global template called Normal; every setting they change, every keystroke they redefine, every style they apply, get stored in this template file. Most people, in other words, never need step into the piranha-infested Template River.

Learning about templates, however, is useful for anyone who is more ambitious. For example:

- If you collaborate with other people, you can send them a template you've created that contains an officially sanctioned set of styles so that all your documents will have a consistent look.
- Similarly, your boss or network administrator may give *you* a template file, filled with styles, so that your corporate correspondence will resemble everyone else's.

- Or maybe you plan to use your laptop and want to ensure that all of the custom keystrokes, auto text entries, and styles that you've carefully worked up on your desktop Mac are in place on the laptop.

The following pages take you through this insanely challenging topic with as few migraines as possible.

Document Templates

In any normal program, a template is simply a stationery pad, a locked icon in the Finder that, when opened, automatically generates a blank, untitled copy of the original. If you frequently (or even occasionally) need to create documents that incorporate certain standard elements, such as your letterhead at the top or boilerplate text, document templates can save you a lot of time.

Word offers something like this kind of template, too. You see dozens of these templates, called document templates, whenever you choose File→Project Gallery. These are regular Word documents—brochures, labels, newsletters, and so on—that have been saved in a special, self-duplicating format. You can read more about the Project Gallery at the beginning of Chapter 1.

Creating a document template

It's very easy to create your own document templates. Just prepare a Word document. Dress it up with graphics, font selections, dummy text, tables, forms, whatever you like. It's very important to understand that you can also customize this document with Word's more advanced features, such as:

- Styles
- AutoText entries
- Macros
- Margins and tab settings
- Customized menus and toolbars
- Page layout (columns, for example)
- Headers and footers

Then choose File→Save As. You can, if you wish, choose Document Template from the Format pop-up menu, but it's not technically necessary; *any* Word document, even a normal one, that you save into Microsoft Office 2001→Templates folder behaves like a template. The primary advantage of choosing Format→Document Template is that Word jumps to that folder (or, rather, the Microsoft Office 2001→Templates→My Templates folder) for you automatically.

Name the file and then click Save.

Using a document template

From now on, whenever you'd like to peel off a copy of that template, choose File→Project Gallery, click My Templates (or whatever folder you selected inside the Templates folder), and double-click the name of the corresponding template. It's just like opening a regular Word document, except that instead of appearing as a blank, stripped-down document, it comes complete with a number of predefined elements. The keystrokes you defined in the template, the styles you set up, the AutoText entries, dummy text, and so on will all be ready to use. You have but to save the new, untitled document and give it a name of its own.

If you send a copy of this document template to other people or other machines, all of these preference settings will similarly be ready to use any time they open it. (If a Windows person might be the recipient, remember to add *.dot* to the end of the file's name; otherwise, Word for Windows won't recognize it.)

The settings, keystrokes, macros, toolbars, and so on will not, however, be available in any other Word document—only new ones that have been "peeled off" from the document template. You or your colleague may wind up longing for a method of making these customizations available universally, to any Word document, including existing ones. That's perfectly possible—and it's the purpose of *global* templates.

Global Templates

Every Word document, even a new blank one that you've just opened, is based on a template; that's why you see a list of styles available in the Formatting Palette of even a brand-new file. Behind the scenes, every Word document is based, at the minimum, upon a template called Normal.

Normal is what Word calls a *global* template, meaning that it's available to all documents, all the time (unless you intentionally *unload* it, as described on page 196). Exactly as with document templates, a global template determines what styles (see page 129), macros, toolbars, page layout elements, AutoText entries, and other features are available when you use the document—but you don't have to go through the Project Gallery to open one, as you would with a document template.

Note: There's no technical difference between a document template and a global template–the same template file can serve as either one. The only difference is how you *load* it; if you use the Project Gallery, the template affects only a single document. If you use the Templates and Add-Ins command as described on page 195, the template affects all documents.

Modifying a Template

No matter how hard you try to get a template the way you want it, the time comes when you have to go back and change it. You want to make your heading sizes smaller, or you have a new logo, and so on.

In a nutshell, you make such changes by opening the template file (choose File→Open, navigate to the Microsoft Office 2001→Templates folder, and open the

template you want to modify). Make whatever changes you want to the document—adjust the styles, margins, zoom level, default font, whatever—and then choose File→Save (see Figure 6-5). All new documents you spin off from that template will reflect your changes.

Tip: When you modify a template, the changes don't automatically ripple through all *existing* documents you peeled off from it before the change. You can open each of those older files, however, and force them to update their styles, macros, keystrokes, and so on, to reflect the changed template. To do so, choose Tools→Templates and Add-ins. Turn on "Automatically update document styles." Click OK.

Attaching a Document Template

It happens sometimes that 20 minutes into working on a new document, you realize that there's a template that would be just perfect for it. Fortunately, Word lets you *attach* a new template to a document, even if it began life as the offspring of a different document template. For instance, you begin a letter and decide that the Normal template looks a little too plain. You can look through the Project Gallery, find a letter template whose styles appeal to you, and attach it.

Here's how to attach a new document template:

1. **Choose Tools→Templates and Add-Ins.**

   The Templates and Add-Ins dialog box appears.

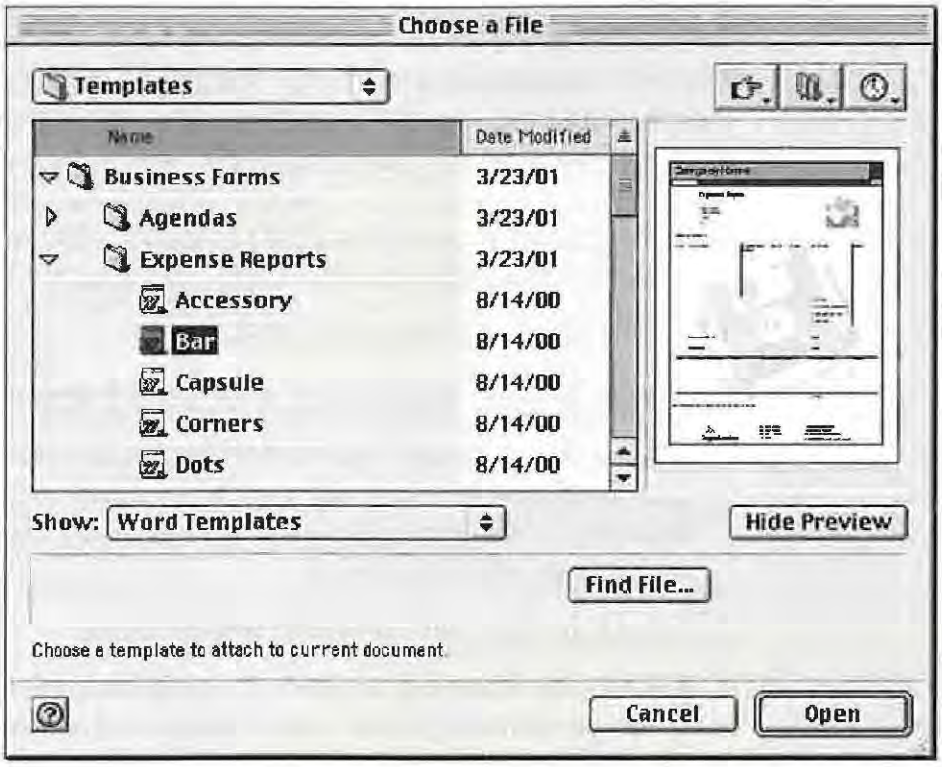


Figure 6-5: *The templates that come with Office 2001 are stored in the Microsoft Office 2001→Templates folder, but you can use this dialog box to navigate to a template anywhere on your Mac. Remember that any document, template or not, in your Templates folder (or a folder in your Templates folder) is automatically treated as a template, and shows up in your Project Gallery.*

2. **Click Attach. In the Choose a File box, navigate to, and open, the template you'd like to attach, as shown in Figure 6-5.**

   The file name of the newly attached template appears in the "Document template" box of the Templates and Add-Ins dialog box (see Figure 6-5).

3. **Click "Automatically update document styles"; click OK.**

   The Normal *style* in your document (which, confusingly, is unrelated to the Normal *template)*, along with other built-in styles (Heading 1, Heading 2, and so on) change to match those in the template you just attached. Moreover, your document now uses any macros, AutoText entries, custom toolbars, shortcut keys, and custom menus that were stored in the attached template. (If you want to use the macros and customizations without changing styles, do *not* click "Automatically update document styles" in step 3.)

Note: Boilerplate text and graphics from the newly attached template don't suddenly appear in your document. Styles from the template don't appear, either, unless the current document has styles whose names match. If you still want the new template's styles imported to your document, you must copy them into your document using the Organizer, as described on page 192, or use the Format→Style dialog box.

Word only lets you have one document template attached at a time. When you attach a new one, the old one goes away. This is one of the ways that document templates are different from global templates, which can be uses more than one at a time (see page 195).

The Organizer

Any style, AutoText entry, custom toolbar, or macro that you create and save to a document becomes part of a template (either the Normal template or a document template). Because of a little-known but very timesaving Word feature called the Organizer, you never have to create one of those custom items more than once. The Organizer, the great-great-grandchild of Apple's 1984 Font/DA Mover program, lets you transfer these items from file to file (see Figure 6-6).

To use the Organizer, proceed like this:

1. **Choose Tools→Templates and Add-Ins; click Organizer.**

   You can also get to the Organizer by choosing Format→Styles and clicking Organizer, by choosing Tools→Macros and then clicking Organizer, and probably by tunneling underneath your kitchen floor. In any case, the Organizer dialog box opens, as shown in Figure 6-6.

2. **Inspect the file names above the two list boxes.**

   The left box always represents the current document or document template if there is one; the right box represents the current global template. However, it doesn't matter which is which. You can move a style, AutoText entry, toolbar, or macro from any document or template to any other, in either direction.

3. **Set up the two lists so that the files you want to copy to and from are visible.**

   If you don't see the document or template that has what you want, click Close File below one of the boxes. When the button changes to Open File, click it again. The Choose a File dialog box opens; use it to navigate to, and open, the template or document that has the features you want to copy.

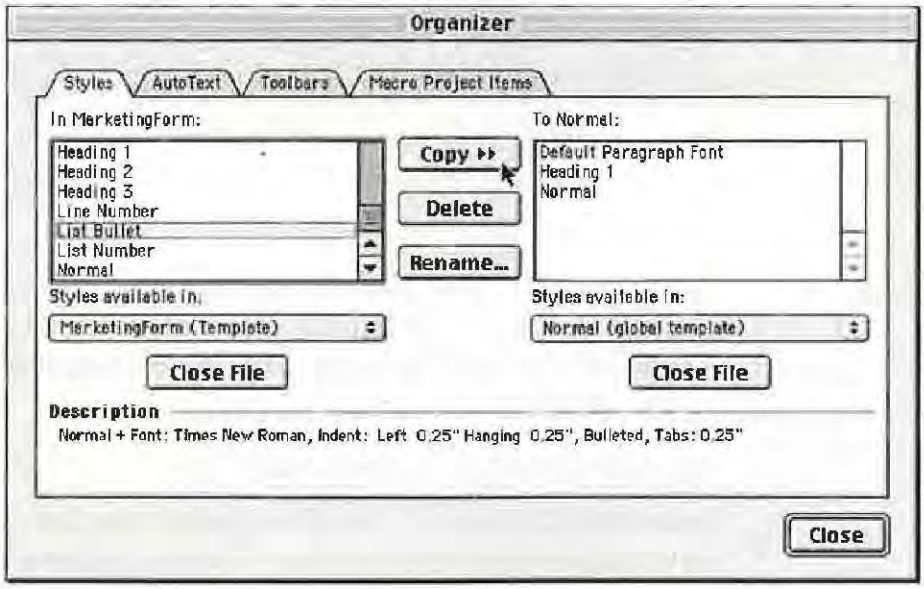


Figure 6-6: *When you click an item in either list box, the direction of the arrows on the Copy button change accordingly. You can Shift-click to select a number of consecutive list items, or ⌘-click to select (or deselect) items that aren't consecutive in the list.*

Tip: To save frustration, note well that the Show pop-up menu at the bottom of the Choose a File dialog box always defaults to *Word Templates*. In other words, if you're looking for a standard Word file that contains styles you like, you won't see it in the Choose a File dialog box until you choose Show→All Word Documents.

If you began this exercise with the destination, or target, document open on the screen, it should already be listed on the left side of the Organizer. If not, however, it's easy enough to click its Close File/Open File button so that the correct destination file is also listed.

4. **Click the appropriate tab at the top of the Organizer dialog box, depending on the kind of items you want to copy.**

   For example, suppose you created some terrific AutoText entries while working on a different Mac. You want to use them on your home-based Mac now. So, you cleverly emailed yourself the file, bringing those AutoText entries along for the ride.

   Now you've opened the Organizer; on the left side, you've opened the document that contains the AutoText entries. On the right side, you've opened the Normal template, so that Word will autocomplete those entries all the time on *your* Mac. Click the AutoText tab to see all the AutoText entries contained in the files on both sides.

5. **When you find an item you want to copy from one document or template to another, click it and then click Copy.**

   See Figure 6-6 for advice on selecting more than one entry. In any case, after you click Copy (or press ⌘-C), the selected items now appear in both lists. (If there's already an item of the same name in the target file, Word asks you to confirm that you want to replace it.) You can copy in both directions, as much as you like.

Tip: You can also use the Organizer to *rename* template items, such as styles and macros. Just click one and then click Rename. Enter the new name in the small dialog box that appears and click OK.

If you ever want to *delete* items—AutoText entries that pop up too often, or macros that you no longer need, for example—the Organizer is the place to do that, too. Select the item in one of the list boxes and click Delete.

---

6. **Click Close.**

   You return to your document, where the changes you made in the Organizer are now in effect.

Normal and Global Templates

Every Word document is based on a global template. As noted earlier, 99 percent of all Word documents are based on the Normal global template, usually unbeknownst to their authors. In fact, the very first time you launch Word and click the icon for a blank document, you're using the Normal template.

The Normal template

That's why the very first Word document you ever created (and probably most of them since that time) came set up to use certain default settings: the Normal font style (Times, 12 point), three heading styles, one-inch page margins, and so on. Whenever you create new styles (as described on page 129), they wind up being saved as part of the Normal template, so that they'll appear in the Formatting Palette Style list of any other Word document you open.

But what if you want to change the default page margins, or change the Normal font to something a little less, well, normal?

The easiest way is simply to choose File→Open, navigate to the Microsoft Office 2001→Templates folder, and double-click the Normal template. Make whatever changes you want—to the Normal font style (choose Format→Style), to the paragraph containing the blinking insertion point, which all subsequent paragraphs will inherit (Format→Paragraph), to the document margins (Format→Document), and so on. Save and close the document. Your modified Normal template will now determine the specs of any subsequent documents you create.

Tip: The default setting that most of the world's Word users want to change is the *font;* experienced Word veterans don't care if they never see Times 12 again. For this reason, Microsoft provides a shortcut to modifying the default font in the Normal template–a method that protects the novice from even having to know about templates.

It's the Default button. Choose Format→Font, choose a typeface, and then click Default; click Yes to confirm. Any new documents you create using the File→New command automatically reflect your changes.

This useful Default button also shows up when you're modifying your margins (Format→Document), page setup (File→Page Setup), and proofing language (Tools→Language)–all of which represent the most popular default formatting changes.

Loading a template as global

Suppose someone has sent you a Word template containing macros, AutoText entries, custom toolbars, shortcut keys, and custom menus that you'd like to use frequently. Instead of having to recreate them, you can turn that person's document into a global template and use those settings at will. To do so, open the document and then:

1. **Choose File→Save As. Navigate to the Microsoft Office 2001→Templates→My Templates folder. Click Save.**

   Word saves the document as a template.

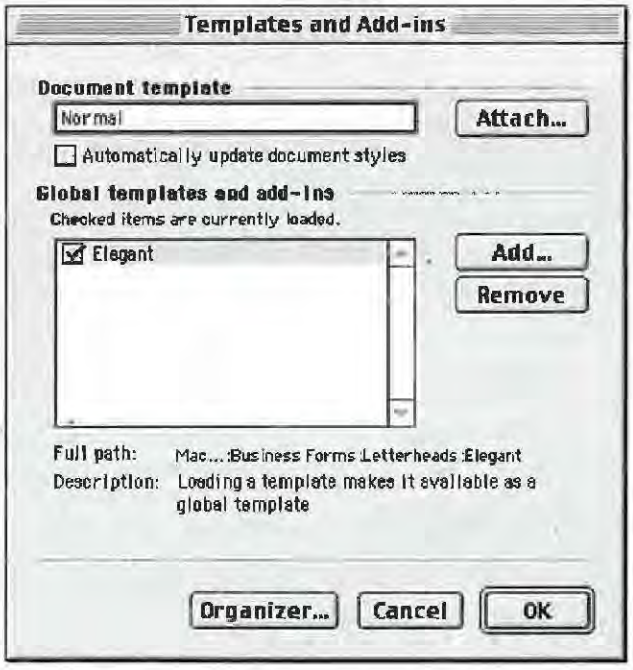


Figure 6-7:
You can make the styles in any Word template available in every Word document by loading the template as a global template, as shown here.

Tip: To save time, don't bother choosing "Document Template" from the Format pop-up menu. Whenever you save a document—even a regular Word file—into the My Templates folder (or any other folder in the Templates folder), Word understands that you want to use it as a template.

2. **Open a new blank document. Choose Tools→Templates and Add-Ins.**

   The Templates and Add-Ins dialog box opens, as shown in Figure 6-7.

3. **Click Add. Navigate to the My Templates folder; open the template you just saved.**

   The template now appears in the list box, checked, as shown in Figure 6-7.

4. **Click OK.**

Loading a new global template has a similar effect to attaching a new document template (macros, AutoText, custom menus, and shortcut keys are transferred to your document), but because it's a *global* template, these items are available in all documents, until you either unload the template or quit Word.

Note: You don't get a global template's *styles* when you attach it in this way. The only way to transfer them into your document is to use the Organizer as described on page 192.

Unloading a global template

Having several global templates open uses up memory and can slow your Mac down. To unload a global template you no longer need, choose Tools→Templates and Add-ins and uncheck it in the list, or click Remove.

POWER USERS' CLINIC

Using a template as a startup item

Word automatically unloads any global templates you load (other than the Normal template) when you quit Word. When you open Word again, the Normal template is, by default, the only global template loaded.

If you want to make available the styles, macros, and other attributes of another global template all the time, you can pursue one of two avenues:

- Copy them into the Normal template using the Organizer, as described on page 192.
- Turn the additional global template into a *startup item*.

To do the latter, navigate to the template on your Mac's hard drive; it's probably in the Microsoft Office 2001→Templates folder. Click the template's document icon to select it and choose File→Duplicate. Drag the copied file to the Microsoft Office 2001→Office→Start up→Word folder.

From now on, this startup template is automatically loaded to every document you open, every time you start Word. In other words, this global template is *not* automatically unloaded when you quit Word.

The Outliner

Your teachers were right: the more time you spend on the outline, the less work you'll have to do when it comes time to writing your actual paper, story, article, or book. Word's outline maker is an underutilized tool that can revolutionize the way you work and even think. It frees you from the drudgery of keeping track of all the letters and numbers in an outline, while encouraging you to categorize and prioritize your ideas.

Building an Outline

To start outlining your document from the beginning, open a blank document and choose View→Outline, or click the fourth tiny icon at the lower-left corner of your document window. (You can also apply Outline view to an existing document, which is described later in this section.)

Whenever you switch to Outline view, the Outline toolbar appears (see Figure 6-8). When you first start typing, your words are formatted as Heading 1—the highest level in the outline hierarchy. (Outline headings correspond to Word's built-in heading styles, as described on page 131.)

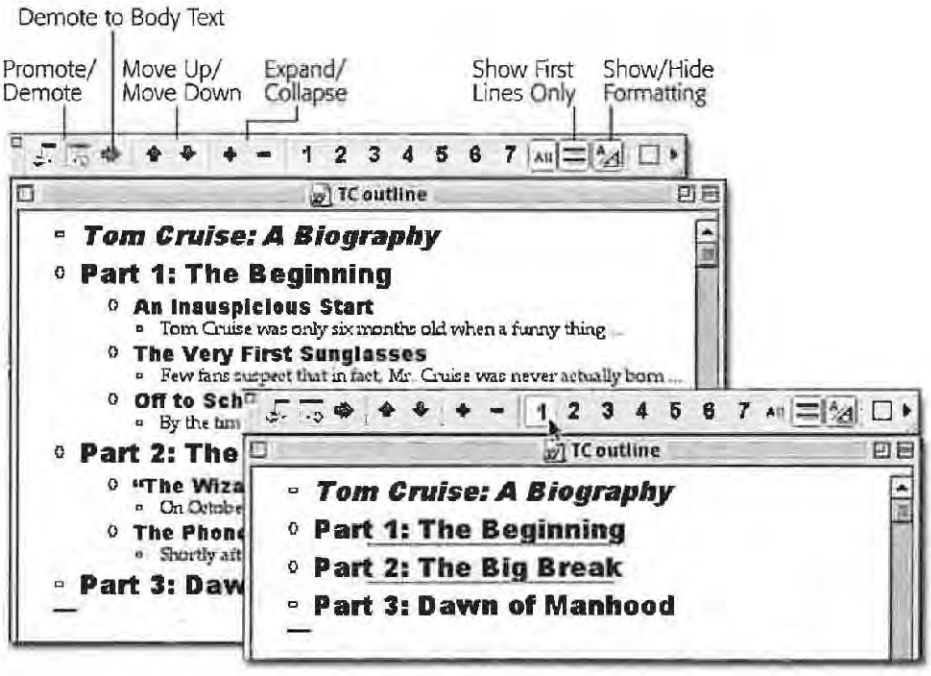


Figure 6-8:
Top: A full-fledged outline in progress. The most important buttons on the toolbar are identified here.

Bottom: By clicking the big 1 on the toolbar, you hide all but the primary Level 1 headings, which gives you an easy overview of your document. You can drag topics around using the + signs as handles.

Now you're ready to build your outline. Press Return after each heading. Along the way, you can create the subheadings using either the mouse or the keyboard, as described next.

- **Promoting and demoting.** Moving topics out toward the margin (toward Heading 1, making them more important) or inward (less important) is called *promoting* or *demoting* them.

To promote or demote a heading, click within it and then press Tab (to demote) or Shift-Tab (to promote). Keep pressing until you reach the desired level. (You can also press Tab or Shift-Tab *before* typing a heading.)

Or, if you're a mouse-driven kind of person, click the Promote and Demote buttons at the left of the Outline toolbar (see Figure 6-8), or just drag the + or – symbol as shown in Figure 6-9. *Keyboard Shortcuts:* Control-Shift-left arrow to promote; Control-Shift-right arrow to demote.

Tip: You can promote or demote an entire batch of headings at once. Drag through an outline to select certain headings, or neatly select a heading and all of its subheadings by clicking the + symbol. (To eliminate subtopics from the selection, first click the + sign, then press Shift-click where you want the selection to end.)

- **Inserting body text.** You wouldn't impress many people if everything you wrote were a headline; fortunately, you can flesh out your headings with regular body text by clicking the double-arrow icon on the Outline toolbar. (It stands for "De-

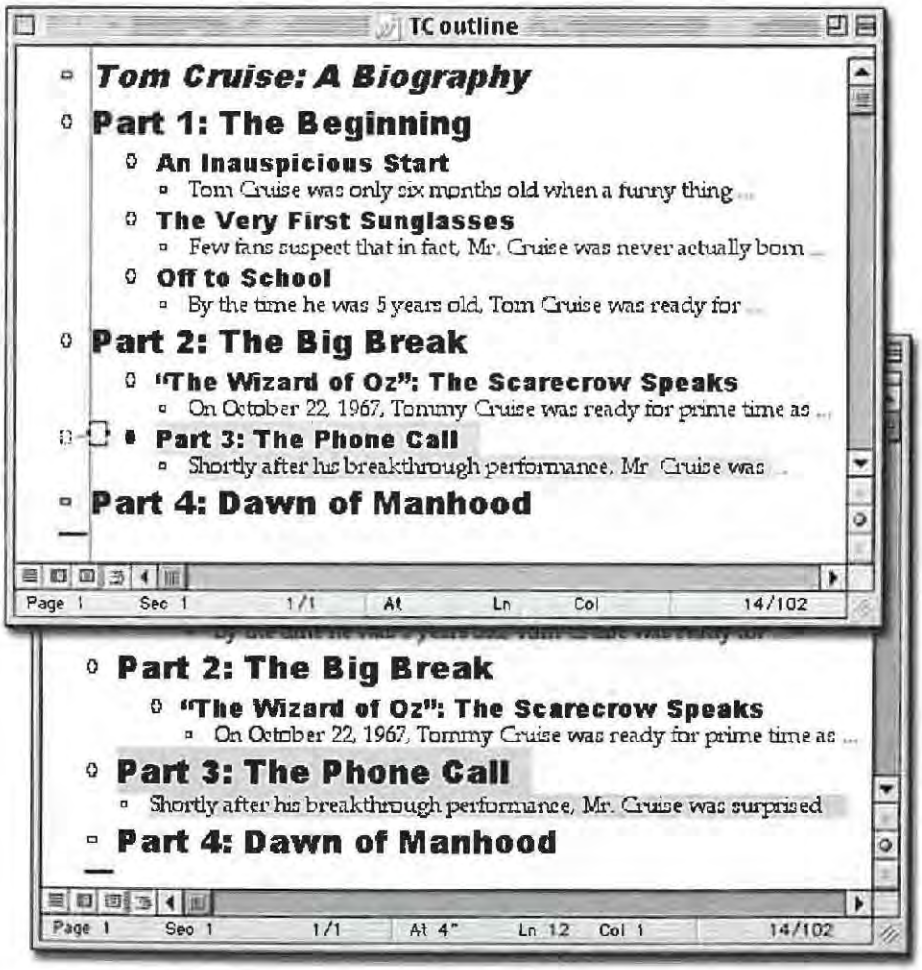


Figure 6-9:
You can promote a heading just by dragging it. As you drag the icon next to a paragraph, the cursor turns into a four-sided arrow. Drag the margin line out to the desired level.

Bottom: When you release the mouse, you've just promoted the heading–to Level 1, in this case. You can turn a paragraph of body text into a heading using the same technique.

mote to Body Text.") Use this style, denoted by a tiny white square in Figure 6-8, for the actual, longer-than-one-line paragraphs and thoughts that constitute the main body of your writing. *Keyboard shortcut:* ⌘-Shift-N.

- **Rearranging headings.** To move topics up and down on the page without promoting or demoting them, just drag them by the + and – handles (see Figure 6-9). Alternatively, you can select the topic or topics and click the Move Up and Move Down arrows on the Outline toolbar. *Keyboard shortcuts:* Control-Shift-up or -down arrow.
- **Breaking up headings.** You'll probably come across instances, especially when "outline-ifying" an existing piece of writing (see below), where you need to separate one sentence from the previous one and make it a new topic. Just click before the first letter of the sentence and then press Return to put it on a new line.

Collapsing and expanding an outline

The whole point of doing an outline is to organize the topics you're presenting, to make sure all the major points are there and to arrange them in some sort of logical order. Therefore, it's good to be able to see just your main points at a glance, unencumbered by the minor details. Here are some ways you can control how much or how little of your outline you see:

- **To show only Level 1 headings:** To get a quick "big-picture" view of your outline, click the large numeral 1 on the Outline toolbar, or press Control-Shift-1; now Word shows *only* your Level 1 headings, the real main points of your document. Everything else is temporarily hidden.

  Similarly, clicking 2 (or pressing Control-Shift-2) shows heading Levels 1 *and* 2, so you can check how your subtopics are looking, and so on (see Figure 6-8).

- **To collapse only one section of an outline:** Double-click the puffy + sign next to it. All subtopics of that heading disappear, leaving just a gray bar behind as evidence that something's been hidden. To expand it again, double-click the + again. (Double-clicking a minus sign doesn't do anything; there's nothing to collapse.) This trick is helpful when you're closely examining a small portion of a long outline and just want to get some minor details temporarily out of your way.
- **To view first lines only:** Click the Show First Line Only button on the Outline toolbar, or press Control-Shift-L, to make Word hide everything but the first line of every paragraph, be it a heading or body text. (This button is shown performing its magic in Figure 6-7, which is why every body paragraph there ends with an ellipsis, like this ...)
- **To hide all body text:** You can collapse all the material that you've relegated to body text, so that only headings are visible, by clicking the All button on the Outline toolbar (or pressing Control-Shift-A).
- **To expand everything:** In an outline where you've collapsed any headings anywhere, the All button takes on a different role: clicking it expands any headings

or body text that have been collapsed. Click All or press Control-Shift-A to get everything out in the open and get back to work. (If you click All again at this point, it will hide all body text and return to its role as body-text toggle.)

Tip: If the heavy boldface type and dark fonts make your outline hard to read, click the Show Formatting button on the toolbar. It makes all headings show up in plain, unformatted type.

Outlining an Existing Document

Say you've been typing away on your latest essay or annual report, and you're stuck. You've run out of ideas, and the ones you did have no longer look so clear now that you see them on screen. It's not too late to apply the organizational power of an outline. Just choose View→Outline; Word displays your document in outline format, using your own line breaks, indents, and headings as a guide. Now you can use the navigational tools described above to reprioritize and clarify your thoughts.

Numbering an Outline

If what you remember about outlining came from high school English class, you may be wondering about the I's and a's and funny little iii's that you were taught to

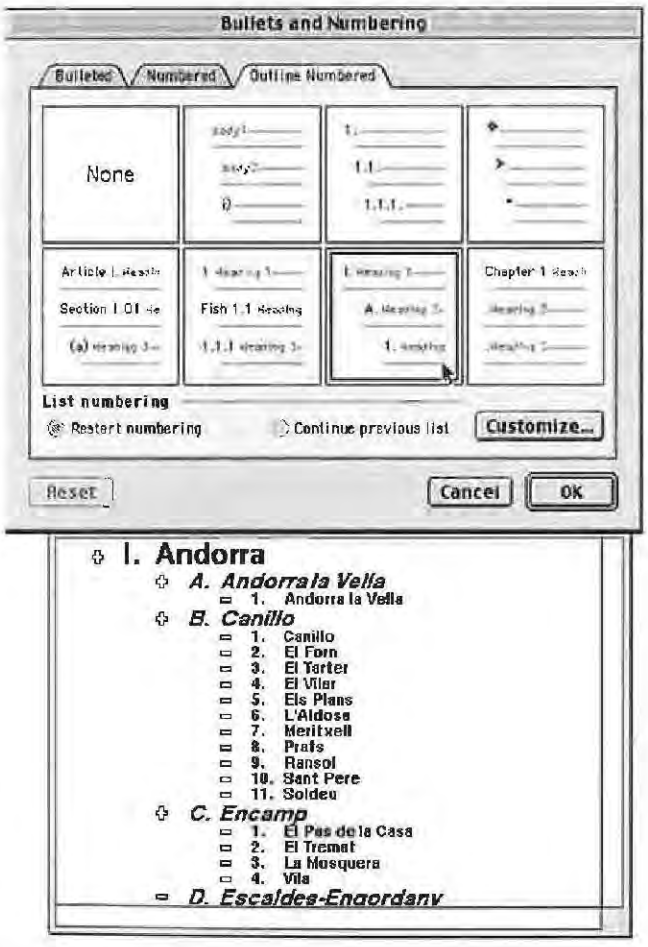


Figure 6-10:
Top: When this dialog box appears, choose one of the seven outline styles; the ones on the bottom row add numbering and apply heading styles to the text on each level. There's also an option for automatically adding the "Article" and "Section" labels used in legal documents (Article 1, Article 2...), and another for using Outline format for chapter headings. If one of the illustrated numbering styles fits your needs, click it and click OK. If not, see "Customizing an Outline" in the next section. Click OK when you're set. Bottom: The resulting outline is numbered automatically, according to the style you've selected.

use as outline numbers. Not only can Word number your headings and subheadings automatically, but it can automatically renumber the outline as you move topics around.

To add numbering to an outline, choose Format→Bullets and Numbering→Outline Numbered tab. Then proceed as shown in Figure 6-10.

Now continue working as usual with your outline; even if you drag topics around or insert new ones, Word automatically updates the numbering.

Renumbering a numbered outline

You can't edit these numbers in your document; when you click them, nothing happens at all.

But what if you're starting a new section with a completely different outline in it, and want the numbers to start all over again? Click in the heading whose number you wish to change. Then choose Format→Bullets and Numbering→Outline Numbering tab, and click Customize. To change the number of the current heading, you need to change the number in the "Start at" box, as shown in Figure 6-11. Any numbered headings that come after this one will be numbered in order after this new starting number.

Customizing an Outline

The seven built-in numbering formats cover most purposes, especially if you're doing the outline for your own benefit. But if you've been asked to turn in a document in outline format, or if you're using Word to create a legal document, you can achieve a more consistent result by customizing the outline's AutoFormatting yourself.

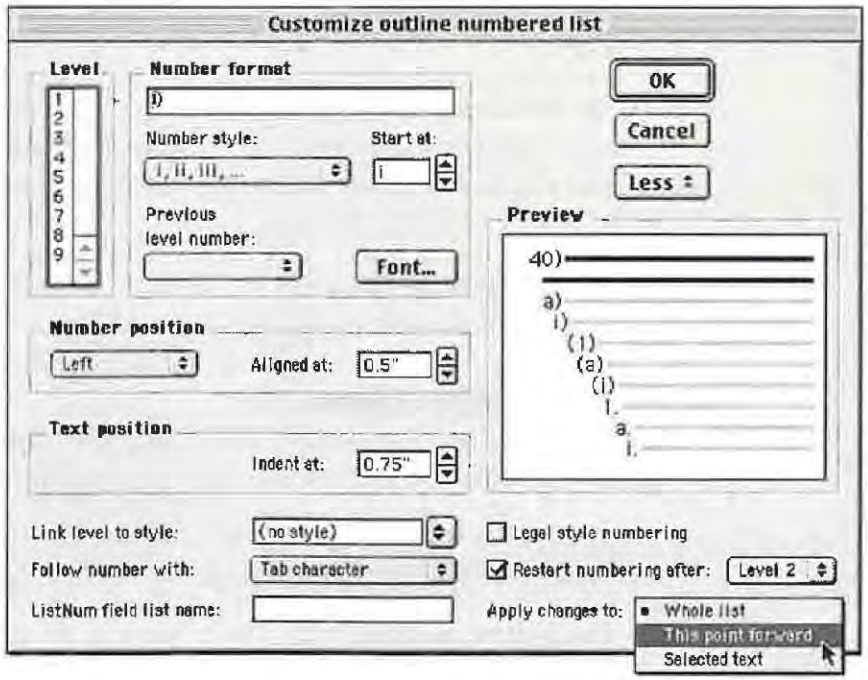


Figure 6-11: *The "Apply changes to" menu lets you make only part of a document into an outline. If it is grayed out, try selecting some text before opening the Bullets and Numbering dialog box and the Customize box.*

Using the Custom Outline dialog box

To set up some unusual numbering style for your outline, choose Format→Bullets and Numbering→Outline Numbered tab, and click Customize.

When the Custom Outline dialog box first opens, as shown in Figure 6-11, the settings you see pertain to the numbering style you've chosen in the Bullets and Numbering dialog box and to the current heading level at the insertion point.

In the Level box at the left, choose the outline level you want to tailor. For instance, you may accept Word's built-in typeface for chapter titles, but want your secondary headings to look different. In that case, leave Level 1 alone and click the 2 in the Level box. The Preview box shows you an example of how the current numbering goes; it changes as you make changes in the Custom Outline dialog box.

- The **Number Format** panel shows the numbering style—letter, Roman numeral, and so on—for the current level.
- Word generally begins counting headings with the number 1. But if you want to print out an outline that's supposed to be a continuation of another document, you may want its numbering to start with, say, 17. That's the number you type into the **Start at** box.
- Choose from the **Previous level number** menu when you want to display level numbers together. Ordinarily, the title might be numbered 1, and the three subheadings a, b, and c. But if you want the subheads numbered 1a, 1b, and 1c instead, choose Level 1 from this menu. This tactic is useful when your outline has long paragraphs; numbering them this way will help keep you from getting lost in the levels.
- The **Font** button lets you choose a font and typeface for the outline *number* only. (To change the font for the heading *text*, use "Link level to style" as described below.)
- The **Number position** panel is where you can choose left, centered, or right alignment, relative to the distance between the text (see below) and the left margin. The **Aligned at** box is where you set the left indent. Watch what happens in the Preview box as you click the arrows.
- The **Text position** box sets the distance of the text from the left margin. It operates independently of the number position.

Advanced outline customization

If you click the More button, the dialog box expands, sprouting a handy foldout panel that offers even more intimidating-looking options.

- In the **Link level to style** menu, you can choose to apply any of the styles in the current document template (see page 188) to the level that you're formatting.
- The **Follow number with** menu lets you insert a tab, a space, or nothing at all between the number and the text. (You do it here because you can't directly format outline numbers in your document, not even in Outline view.)

- The **ListNum field list name** box lets you insert a *second* number into an outline numbered item.
- You can use the **Legal style numbering** box to apply legal style (no capital letters, no capital Roman numerals) to any numbering style. This box grays out the "Number style" menu and gives Legal style numbering complete control.
- When you choose a new level in the Level box, the **Restart numbering after** box is checked by default. That's because each subtopic is numbered from the beginning under the main topic that contains it (1a, 1b; 2a, 2b)—you wouldn't want your headings labeled 1a, 1b, 2c, 2d. Thus, under subheading (a), sub-subhead numbers start again with i, ii, iii, and so on, as shown in Figure 6-11.

Click OK (or press Return) to close the Customize box and apply your selections from the Bullets and Numbering dialog box. If you plan to use the outline always in Outline view, you're done; otherwise, consider switching into Normal or Page Layout view for further refinement. You'll discover that the nice, even indenting you saw for your various headings in Outline view may not exist in Normal or Page Layout view; you may have to adjust the indentation of your various heading styles (see page 129) to make the indenting levels correspond in the other views.

The Document Map

The Document Map doesn't actually look like a map; it looks more like a portable table of contents that's open beside you as you read. It's identical to the left-side table-of-contents list you might find in an Adobe Acrobat (PDF) document, if you've

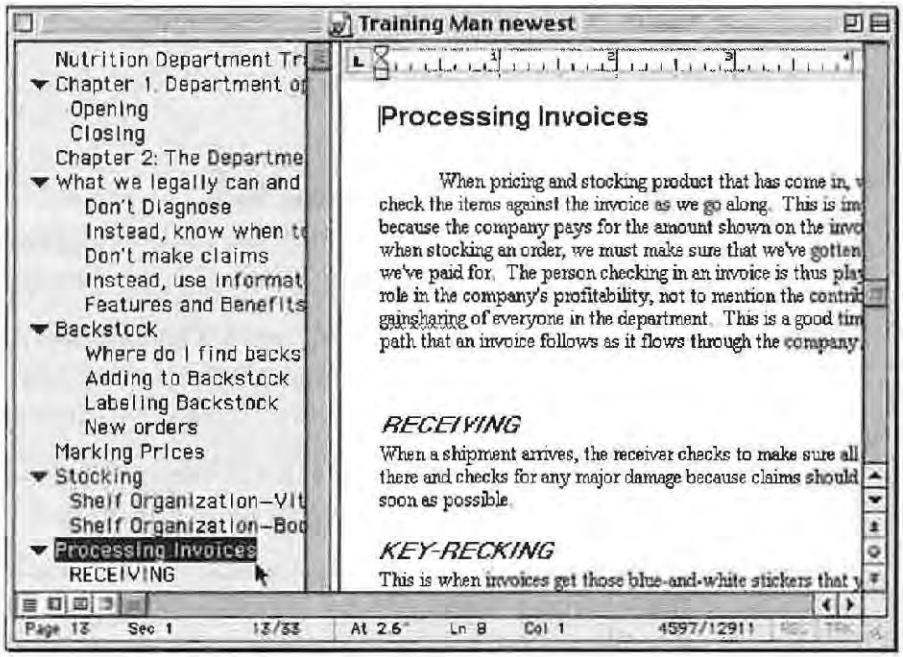


Figure 6-12:
When you click a heading in the Document Map in the left pane, you automatically jump to that point in your document in the right pane. There's no quicker way to get from one place to another in a long document. Plus, when you click the mouse somewhere in your document, that topic is highlighted in the Document Map. It's kind of fun to watch the blue highlight bar jump around as you click, and new words appear when you type.

ever used one of those. No flipping pages—not even much scrolling. Figure 6-12 shows the idea.

What's in the Document Map

In essence, the Document Map is a navigating pane showing just the headings in a document—any text in one of Word's built-in heading styles, a style you've *based on* one of the built-in heading styles, or to which you've applied an *outline level.*

Viewing and Navigating the Document Map

To see the Document Map, choose View→Document Map. A simple gray panel opens down the left side of your document window, with its own vertical scroll bar.

The Document Map doesn't have a horizontal scroll bar at the bottom; if you can't read the full text across the Document Map pane, drag the narrow gray bar—the resize bar—to widen its pane. Actually, you can read the full text of any topic in the Document Map without resizing anything: point the cursor at any line in the Document Map; a yellow, tooltippish label appears, revealing the full heading text.

The flippy triangles in the Document Map work just like those in a Finder window: click one to reveal or conceal all its subtopics. If you're a contextual-menu fan, you can also Control-click a heading in the Document Map and choose Expand or Collapse.

Because the items shown in the Document Map have levels, like headings and outline topics, you can collapse or expand the entire "outline" so that only, for example, the Level 1 and Level 2 headings show up, exactly as you can in Outline view. To do so, Control-click an item in the Document Map and choose a heading level from the contextual menu. If you choose Show Heading 4, for instance, the Document Map will display only Levels 1 through 4, hiding everything else.

To dismiss the Document Map, choose View→Document Map again, or just double-click the resize bar.

Customizing the Document Map

By default, the Document Map shows up with black Geneva text with blue highlight. (Microsoft isn't exactly known for its aesthetic prowess.)

To jazz up the Document Map font (or just make it less ugly), choose Format→Style and choose Document Map in the Styles list box. Click Modify to bring up the Modify Style box.

Now choose Font from the Format menu. Whatever font, color, size, case, or text effect you specify now will apply to all text in the Document Map.

Tip: At this point, you can even change the highlight color, which appears when you click a heading in the Map. Click OK; then, from the Format pop-up menu, choose Borders; click the Shading tab in the resulting dialog box. Choose a color as described on page 599.

Click OK, OK, and Close when you're satisfied. (Clicking Apply will change the current paragraph in your main document to the Document Map style; that's probably not what you want to do.) If you have a change of heart at this point, press ⌘-Z to restore the Document Map to its original, bland condition.

Master Documents

In the beginning, there was Word 5.1. It had fonts, sizes, styles, tables, and graphics.

But the people weren't satisfied. They wanted to bind together many different chapter documents into a single, unified book. They wanted to knit together files written by multiple authors who had edited their respective sections simultaneously on the network. They wanted to print, spell-check, or search-and-replace across dozens of different Word files at once, or generate tables of contents, indexes, and cross-references for all of the component Word files at once.

On the sixth day, Microsoft created the Master Document.

A Master Document looks much like an outline. However, each heading in the Master Document can refer to a section or an entirely different *Word file*. As in the Document Map, you can click these headings in Master Document view to travel directly from one part of the document to another.

In essence, a Master Document is like a binder holding all the individual Word files that make it up (which Microsoft calls *subdocuments*). Each subdocument can be formatted independently, moved or removed, split up or combined with another subdocument, all while remaining safely under the umbrella of the Master Document. The Master Document concept is slightly alien, difficult to understand, and sometimes a bit flaky; but if you're putting a book together, Master Documents may be the only way to go.

Creating a New Master Document

To start building a Master Document, open a new document and choose View→Master Document. The Master Document toolbar appears, and your document is set up for outlining (see Figure 6-13).

Setting up your über-document is exactly like creating an outline (see page 197); you use all the same techniques. Each heading, however, will eventually become the name of a separate file on your hard drive. Because a Master Document will wind up as a herd of individual files, you'd be wise to save it on your hard drive into a folder of its own; the subdocuments will wind up there, too.

Spinning off a document

Once you decide to spin out a particular heading as a subdocument, click it and then click the Create Subdocument button on the Master Document toolbar (see Figure 6-13). (You can also highlight several headings at once—make sure the first one is at the level you'll want represented as subdocuments—before clicking the Create Subdocument button.)

On screen, you see a light gray box that defines the boundaries of the document; you can type or paste into it. Behind the scenes, you've just created a new, linked file icon in your Master Document's folder (Figure 6-13, middle). You or your network comrades can edit these individual files independently; whenever you open up the Master document, you'll see the changes reflected.

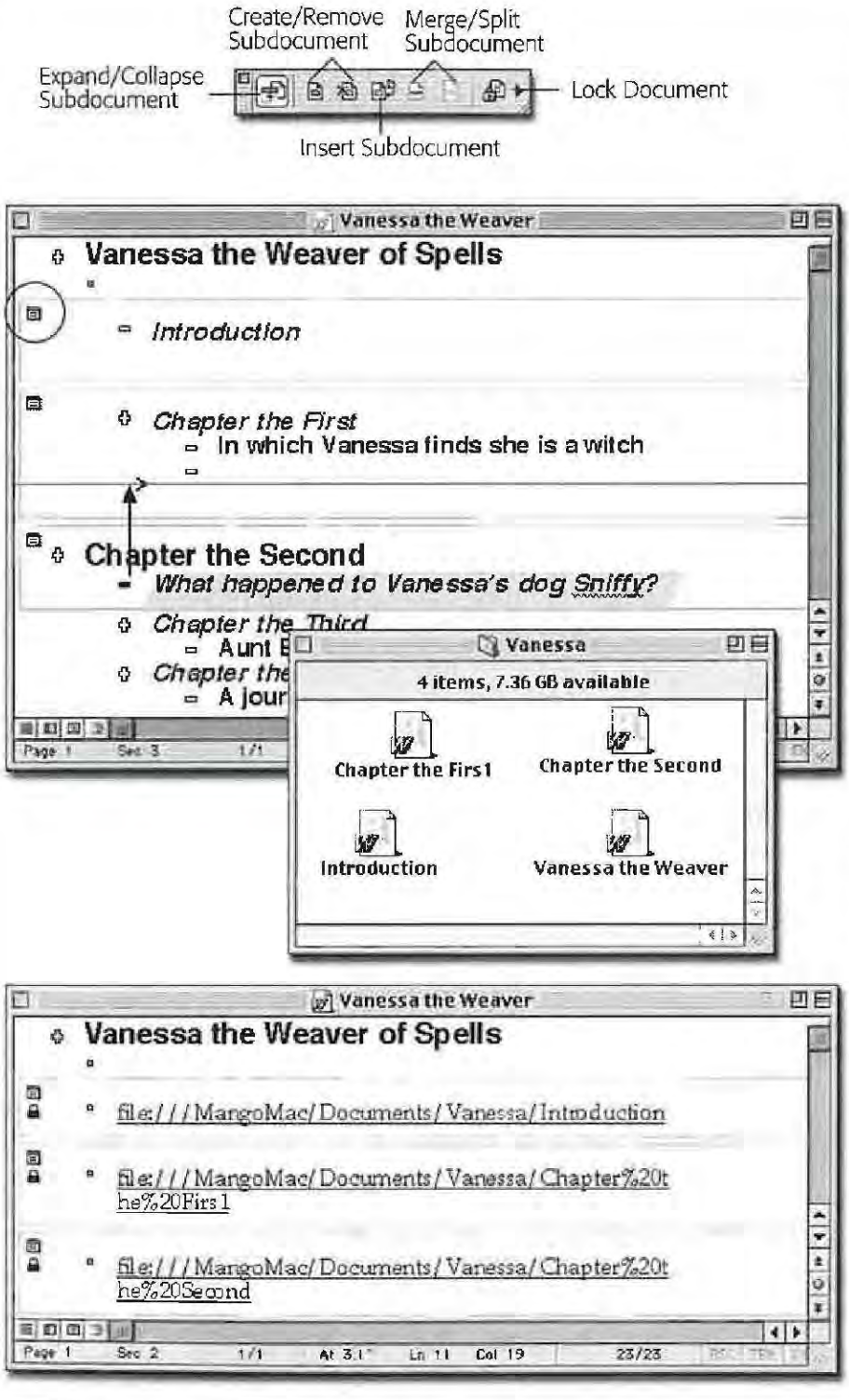


Figure 6-13:
Top: The Master Document toolbar and a Master Document, showing three subdocuments. A subdocument icon, like the one circled, represents each document. In Master Document view, you can drag text from one subdocument to another. Here the heading "What happened to Vanessa's dog Sniffy?" is being dragged from the Master Document outline into the subdocument "Chapter the First."

Middle: Behind the scenes, each master document is represented on your hard drive by individual Word documents.

Bottom: If you click the Collapse Subdocuments icon on the toolbar, the nature of your subdocuments becomes all too real–you see only hyperlinks to their locations on your hard drive, spelled out as file paths.

Note: Subdocument files are stored in the same folder as the Master Document and behave like perfectly normal Word files. But don't drag their icons to another folder, rename them by clicking the icon's name, and so on. If you do, the Master Document will not be able to find them. Instead, move and rename subdocuments using the techniques described later in this section.

To copy a Master Document and all its subdocuments to another location, the safest way is to select them all and move them all at once (or just move the folder that contains them).

Incorporating a document

You can turn an existing Word document on your hard drive into a new subdocument, too: Just click the Insert Subdocument icon on the Master Document toolbar. The Insert Subdocument dialog box opens. When you navigate to and select a file and click Open, the contents of the document appear in your Master Document as a subdocument, just like all the others.

Tip: You may find that your outline headings have lost their sense of identity—this is where Master Document building gets iffy—but you can usually regain your composure by adding a new heading inside the gray boundaries of the imported document.

Viewing Master Documents

Master Documents look and act vastly different in each of Word's views. If you can remember to switch into the correct view for what you're trying to do, you've won more than half of the Master Document battle.

- **In Normal view**, subdocuments become *sections* (see page 125), with a section break separating each. Use Normal view to type and edit your document. Be careful not to remove the section breaks; you'll inadvertently combine the Word documents that make up your Master.

  If, in Normal view, your document looks like a series of hyperlinks, with no other text, you have two choices: click on a hyperlink to open that subdocument in a new window, or choose View→Master Document and click the Expand Subdocuments button. Now when you return to Normal view, the text in your Master Document will flow continuously, with a section break between subdocuments.

- **Online and Page Layout views** function just as they normally do; your document appears to be a seamless whole, with no visible breaks between subdocuments.

- **Outline view** turns the Master Document into one big outline; here too, if you see hyperlinks instead of text, expand the subdocuments as described above. This view is useful for organizing your document at any stage of the process because it's so easy to drag-and-drop. In Outline view, subdocuments are represented by continuous section breaks.

Working with Master Documents

In Master Document view, you can see all your subdocuments and open them, arrange and organize them, and control access to them.

Collapsing and expanding subdocuments

When you click the Collapse Subdocuments button (first on the Master Document toolbar), something very odd happens: each subdocument is listed as a blue, underlined hyperlink, and you see only its heading (Figure 6-13, bottom). The rest is collapsed, exactly as in an outline. The text of the hyperlinks may look unfamiliar to you; that's because they are the *folder path and file name* of the subdocument. Clicking a link opens the subdocument in its own window.

You also see a padlock icon next to each heading. It's a bug; that document is not, in fact, locked in any way. If you double-click it (to open the file into its own window) or expand it, you'll find that it's easily editable.

Tip: You *can* lock a subdocument so that it's protected from errant mouse clicks in Master Document view; just click in the heading and click the padlock icon on the toolbar. Even so, double-clicking that heading opens it into its own window, which is easily editable. In other words, the Lock function doesn't offer what you'd call government-level security.

Once you've collapsed your subdocuments, you can drag their little document icons up or down to rearrange them (or press Delete to remove them).

When you then click the Expand Subdocuments button on the Master Document toolbar (the very first icon) again, the subdocuments open within the Master Document window. A light gray box outlines the contents of the subdocument in outline form.

Moving and renaming subdocuments

Don't rename or move a subdocument in the Finder; if you do, the Master Document will no longer be able to find it. If you really want to rename or move one of these documents, do so from within the Master document like this:

1. **Open the subdocument into its own window.**

   You can do so by double-clicking its subdocument icon (circled in Figure 6-13).

2. **Choose File→Save As. Type a new name for the subdocument and, if desired, choose a new location for it. Click Save or press Return.**

With these two steps, you've updated the Master Document's *link* to the subdocument. The next time you open the subdocument from within the Master Document, the one with the new name and location will open. (The subdocument with the old name and location is still there, sitting on your hard drive as an independent Word document. You can delete it, unless you have some further use for it.)

Splitting and combining subdocuments

Suppose you decide that a chapter is getting too long, and you want to chop it into two shorter ones. Or perhaps two people who were collaborating on a report have had a big fight, requiring you to solve the problem by giving them individual assignments. Fortunately, the process of dividing a subdocument in two, which Word calls *splitting*, is comparatively painless.

To do so, expand the subdocuments in Master Document view. Click where you want your split-off document to begin, and then click the Split Subdocument button on the Master Document toolbar.

At other times, you may want your subdocuments to meld together. For instance, you want to combine two short chapters into one longer one, without restarting the pagination. You could cut and paste text from one subdocument into another, but there's a more elegant way, which Word calls *merging*.

To do it, move the subdocuments that you intend to merge so that they're next to each other in your outline. Highlight them, then click the Merge Subdocument button on the Master Document toolbar.

The new, merged subdocument carries the name of the *first* subdocument that you combined. The original, unmerged versions of the second (and other) subdocument files remain in their original folder locations on your hard drive, but they're no longer connected to the Master Document. If you're not going to use them again, you can delete them to save disk space.

"Removing" a subdocument

The Remove Subdocument button on the Master Document toolbar doesn't actually delete it (for that, see below). Instead, this function brings the document's contents into the Master Document itself, so that it's no longer linked to an external file on your hard drive. You might use it when, for example, for formatting reasons, you want to make your introduction part of the Master Document instead of giving it a subdocument of its own.

To do so, expand the subdocuments. Click the subdocument icon, then click Remove Subdocument on the Master Document toolbar. The contents of that subdocument now appear in the Master Document. (You may delete the old subdocument file, which is now orphaned on your hard drive, unless you want to keep it as backup.)

Deleting subdocuments

Deleting a subdocument from a Master Document is easy: with the subdocument expanded and unlocked (see the facing page), click the subdocument icon to select it and then press Delete. (When you delete a subdocument, you only remove it from the Master Document; you don't actually delete its file. The original subdocument file is still in the same folder where you left it, where it will stay until you Trash it.)

Master Documents and Formatting

Like all Word documents, every Master Documents is based on a template (see page 188). Not surprisingly, all subdocuments have the same template as the Master Document.

What is surprising, and potentially confusing, is the fact that a subdocument can have its *own* template, independent of the Master Document—and yet it can still take on the Master Document template when you want it to.

In Master Document view, all subdocuments share the same Master Document template—its styles, headers, footers, and so on. When you print *from this view,* all subdocuments print in the styles of the master template, resulting in a very consistent look. But when you open a subdocument *in its own window,* the subdocument's own independent template applies—with its own typestyles, headers, footers, and so on. All the template features listed on page 189 can operate independently in the Master Document and its subdocuments.

Master Document Security

Master documents were designed for sharing. The fact that two people can be working on subdocuments of the same Master Document at the same time makes collaboration easy. When the individual subdocuments are done, you can review and print the finished product in Master Document view, ensuring that the formatting is consistent throughout. An added challenge, however, is keeping people from messing with subdocuments that they shouldn't, whether or not they're doing it maliciously.

Locking and unlocking subdocuments

The simplest (and most easily foiled) way of keeping someone from tampering with a subdocument is to lock it, as described on page 208. When a subdocument is locked, you can open and read it, but you can't edit or change it.

Fortunately, anytime someone is working on a subdocument, the document gets locked automatically when viewed by anyone else on the network. The subdocument remains locked until its editor finishes and closes it.

Assigning passwords

Locking a subdocument by using the Lock Subdocuments button is a good way to prevent anyone from making accidental changes to a subdocument, but it doesn't actually lock out anyone who knows about the Lock Document button.

For true security, Master Documents and subdocuments must be password-protected just like any other. As always, you can password-protect either the Master Document or (if you've opened one into its own window) a subdocument; either way, the instructions on page 20 apply.

Sharing a Master Document on a Network

One of the most popular uses for Master Documents is file sharing. For instance, members of a communication department at work can each work on a separate section of their company's annual report. The report is a Master Document, and each section is a subdocument.

Here are some tips for successful Master Document file sharing:

- Choose one person to be team leader: to format the Master Document, hold the passwords, and oversee the final proofreading and distribution of the completed document.
- To prevent accidental or mischievous tampering with the subdocuments, assign a password to each one, as described on page 20. And make sure the team leader keeps a record of them in a safe place.
- Make sure all Macs involved are networked and set up for file sharing. If any team members are not familiar with file sharing, a consultation with the network administrator is in order. To learn more about setting up file sharing yourself, choose Help→Mac Help in the Finder and search for *file sharing*, or consult *Mac OS 9: The Missing Manual.*

AutoSummarize

Imagine you have a deadline: five minutes to get to the professor's office, and you remember that she wanted you to include an abstract (a summary) at the beginning of your thesis. Or you proudly plunk your report on your boss's desk and he says, "I'm not reading all this. Give me the fifteen-minute version." Word's AutoSummarize feature comes to the rescue in just this kind of situation.

Unfortunately, Word doesn't actually read your document and then write a well-crafted summary. (Maybe in Word 2021.) What Word does is scan the document for frequently used words; it then strings together what it believes to be the key sentences (those that include such words) together into a summary.

In other words, you're best off setting fairly low expectations for this feature. Think of AutoSummarize as a glitzy feature for demos at trade shows, or perhaps as something that *helps* you come up with a summary; you can (and should) edit the summary later.

Creating an AutoSummary

Open the document you wish to summarize; choose Tools→AutoSummarize. Word immediately gets to work, compiling a list of key words in your document and flagging the sentences that contain them. It may take some time, especially in a long document; go watch TV. If nothing's on, you can press ⌘-period to cancel the process.

When Word's behind-the-scenes work is done, it presents you with a dialog box like the one in Figure 6-14.

Type of summary

The icons under the "Type of summary" heading let you choose how you want Word to display the summary it has come up with:

- Click **Highlight key points** if you'd like to scroll through your document and see which sentences Word flagged as being key points for inclusion in the summary. This is a good way to see how Word has interpreted your document.

  When you click OK, your document appears with yellow highlighting on certain sentences. You also get a tiny toolbar containing a button for toggling between your original document and the highlighted version, as well as a slider for adjusting the length of summary percentage, as described below. Click Close on this toolbar to return to your document in its original condition.

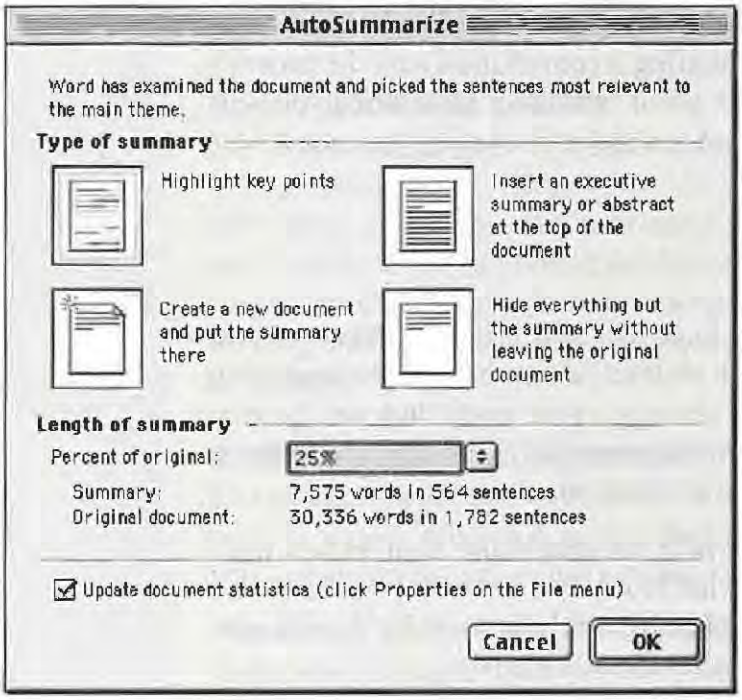


Figure 6-14:
If you have filled in the Keywords and Comments boxes on the File→Properties→ Summary tab, turn off the "Update document statistics" box here. Otherwise, Word will replace your keywords and comments with its own keywords and summary.

- **Insert an executive summary** copies the sentences Word has chosen as representative and displays them at the *beginning* of the document. If the summary is either too exhaustively long or too sketchy, press ⌘-Z to undo the AutoSummary and see "Length of summary" below.
- **Create a new document** opens a blank Word document and puts the summary there (instead of at the top of the document).
- **Hide everything** is the choice for those who can't commit. When you click OK, it shows you the summary, hiding the balance of the document without actually closing it. A small toolbar also opens, in which you can adjust the length of the summary (see below) and toggle between the summary and the full document.

- Under **Length of summary** at the bottom of the dialog box, Word shows you the length of the summary relative to the full document. The default is 25%, which means that the summary is exactly one-quarter the length of the document as a whole. When you change the percentage and then click OK, the AutoSummarize dialog box goes away, and Word redoes the summary according to your whims.

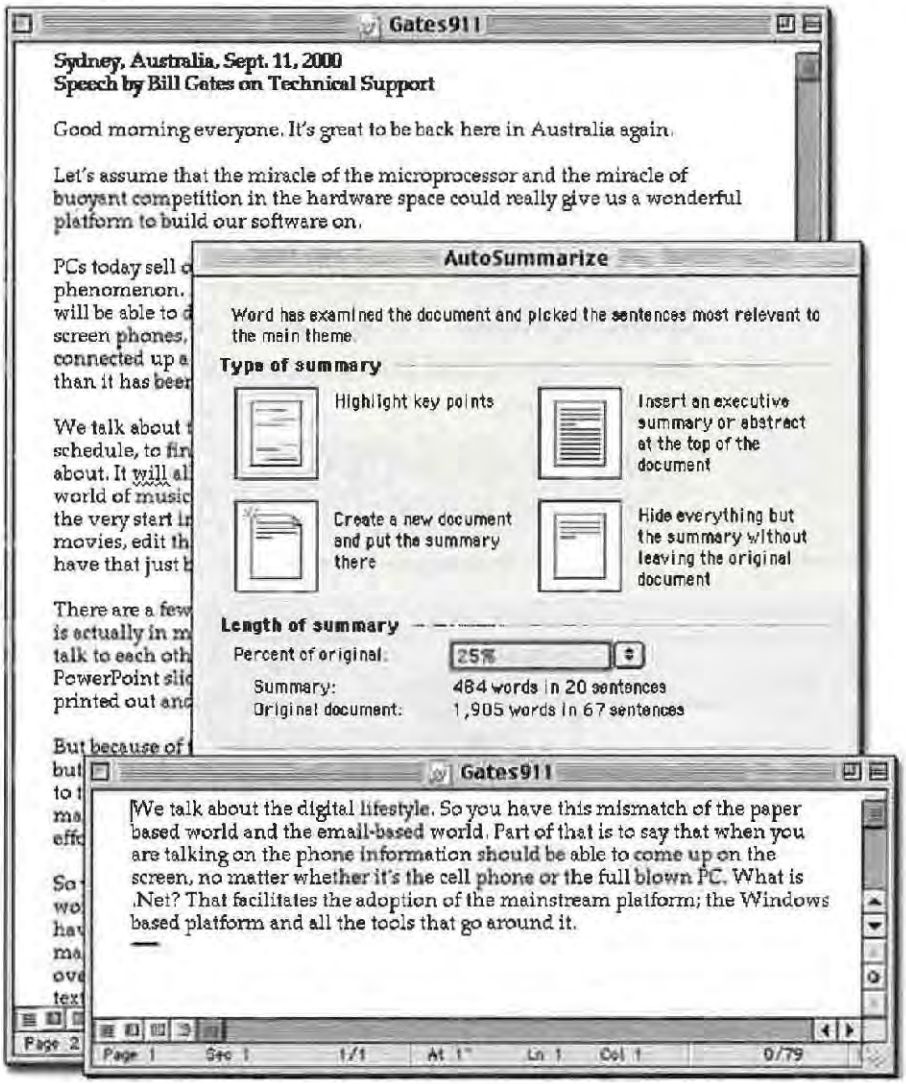


Figure 6-15:
Top: Bill Gates rambled on for quite some time in a 2000 speech to a Sydney, Australia audience.

Bottom: The ten-sentence summary of the speech really tells you everything you need to know.

Working with Fields

The concept of *temporary placeholders* is one of mankind's greatest inventions. When you change a tire, the jack acts as a stand-in for the tire, supporting the car until the new tire is in place. When technicians set up the lighting for a particular Hollywood movie scene, a low-paid extra stands there patiently as a model, so that the highly paid star doesn't have to stand there for hours while the technicians fiddle with shadows. When a magazine designer doesn't yet have the photo that will go on page

3, he'll simply place a box there in the correct size and label it FPO (for position only), with the intention of replacing it with the finished photograph when it's ready.

In Word, *fields* are temporary placeholders that can stand in for information that may change or may come from another location on your hard drive—the current date, a page number, a place you've bookmarked, the name of a Word file, and so on. Fields, in fact, are the basis of some of Word's most powerful features. They let you:

- Create form letters and address labels and merge them with your contact information (see page 239).
- Create indexes (page 232) and tables of contents (page 227).
- Create invoices that calculate their own totals (page 165).
- Create cross-references (page 224) and captions (page 221).

Inserting Fields

You can't *type* a field into a document. You must ask Word to create it in one of the following ways:

- Choose a command that creates a field. These are usually found on the Insert menu, such as Insert→Date and Time.

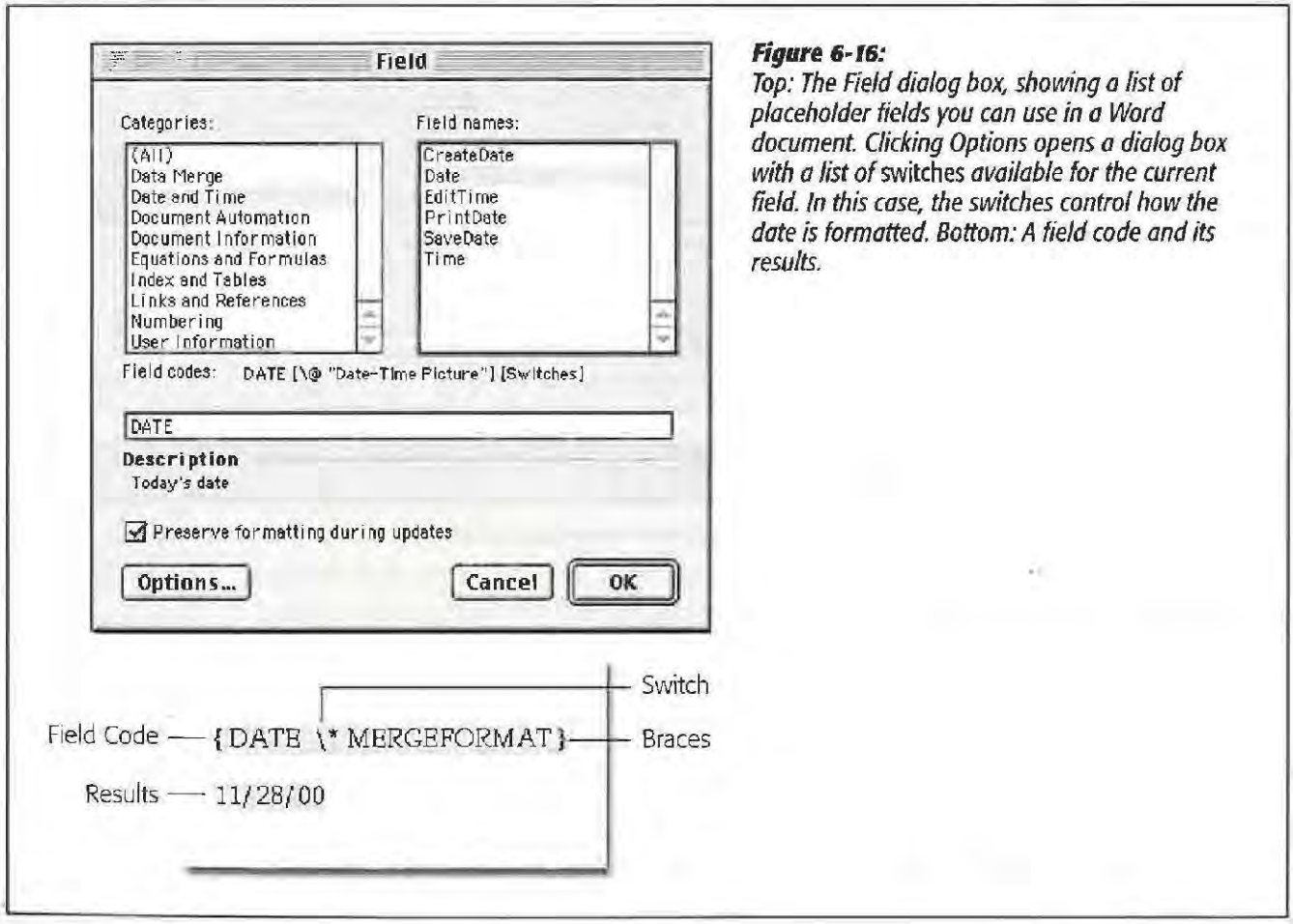


Figure 6-16:
Top: The Field dialog box, showing a list of placeholder fields you can use in a Word document. Clicking Options opens a dialog box with a list of switches available for the current field. In this case, the switches control how the date is formatted. Bottom: A field code and its results.

- Choose Insert→Field and choose one of the available field types from the Field dialog box (see Figure 6-16).
- Press ⌘-F9 and type the field *code*, if you know it. (The field code is a short piece of programmery code, enclosed in braces {like this}, that tells Word what kind of information will go there.)

You may never have to create a field manually. Most of the time, fields are built right into a Word feature or another command. For instance, when you choose Insert→Date and Time, Cross-reference, Bookmark, Footnote, or Caption (all of which are described in the following sections of this chapter), Word uses a field to define the location and content of these features. When you choose any of the items on the Insert→AutoText→Header/Footer submenu, Word uses fields to insert these pieces of document information.

However, there are hundreds more fields at your disposal in Word, and inserting them is as easy as choosing them from a list in the Field dialog box.

Building fields in the Field dialog box

To place a field at the location of the insertion point, choose Insert→Field to open the Field dialog box as shown in Figure 6-16. Because there are so many fields in Word, the program displays them in category groups. When you click a category in the left box, the list of fields in that category appears in the right box.

When you click a field name on the right side, the field code appears in the "Field code" box below (DATE in the example in Figure 6-16). A more complete description appears in the Description panel near the bottom of the dialog box. You can learn a lot about fields just by clicking and reading the descriptions.

Modifying Fields with Switches

The Field dialog box has an Options button that lets you specify in more detail how you want a field to look and act. When you click it, the Field Options dialog box shows you any applicable *switches* (software options), as shown in Figure 6-17. Like the Field dialog box, the Field Options dialog box has a Description panel below the "Field code" box; as you click each option, its description appears. In fact, if you turn on balloons (choose Help→Show Balloons), you can point to various elements of this box to learn more about what they do. (This feature only works when the Help system window is *not* open.) You can read more about switches in the following tutorial.

As you build a field by adding switches or other options, you see the field code grow in the "Field code" box at the bottom of the Field dialog box. (Field veterans can type directly into this box, using the syntax shown above the box as a guide.)

Tip: If you know a thing or two about field codes, you can also edit them directly in the document. Just click in the field code (press Shift-F9 to display the field code instead of the results) and edit away. You can use any Word editing tools *except* Overtype mode (see page 26).

When you've selected any options or switches, click OK (or press Return) to dismiss the Field and Field Options dialog boxes. Word returns you to your document with the newly placed field highlighted in dusky gray. The highlighting alerts you to the fact that you're looking at a field rather than normal Word text. (The highlighting doesn't show up when you print.)

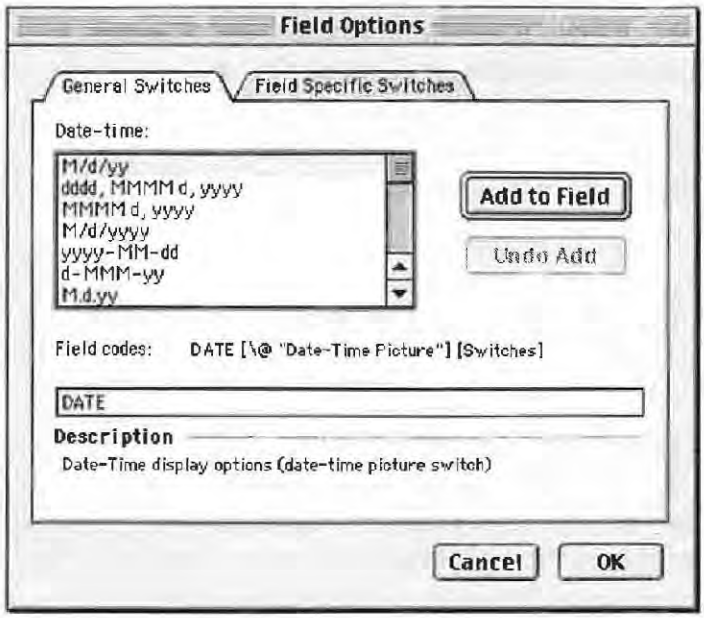


Figure 6-17:
Depending on the field you're modifying, the Field Options dialog box may show one Options tab, or two Switches tabs, as shown here. A switch *is an instruction that modifies the field results; in this case, Date-time switches tell Word how to display the current date and time.*

Tip: If highlighted fields are just too obvious for you, you can take the gray away. Choose Edit→Preferences→View tab. Choose When Selected or Never from the "Field shading" menu. ***Caution:*** If you choose Never, it will be much harder to tell where fields are. Since you can't edit field text as ordinary Word text, confusion may ensue.

What a Field Does

A field is a bit of computer code that, in one way or another, processes information. For instance, a Caption field remembers what number a caption is supposed to be and displays that information (see page 221). The field code contains all the computerish instructions that tell Word how to figure out the Caption number and format it. In another example, a Merge Field code (see page 239) tells Word what piece of information to grab from a database. Finally, a Date field retrieves the date from your Mac's Date & Time Control Panel and places it in your document.

For example, suppose you're creating a fax cover sheet. You figure you'll be using it almost every day. You also have a habit of forgetting to date your faxes, so you want to create a document with a Date field in it, so that when you fax your daily dispatch, it's automatically dated:

1. **Open a blank Word document and begin typing your fax cover sheet. Click wherever you want to place the date. Choose Insert→Field.**

   The Field dialog box opens, as shown in Figure 6-16.

2. **Click "Date and Time" in the Categories box (left) and Date in the "Field names" box.**

   You actually have two options here. *CreateDate* inserts today's date, and that's what you'll always see. *Date* updates automatically; it inserts the current date each time the document is printed. In this case, you obviously want the current date each time.

3. **Click Options. Choose your favorite Month/Day/Year combination from the list box, as shown in Figure 6-17.**

   The date codes are not exactly in common English, but there is a logic to them. In general, a single letter in one of these codes (m) stands for a number (*1* for January, and so on), and a repeated letter (MMMM) stands for a full version (*January* spelled out).

4. **Click Add to Field, then click OK twice.**

   The date appears in your document. When you click it, it appears highlighted in gray to show that it's a field, not a typed-in date.

5. **Save your document.**

   You could also save this document as a template. The Date field works either way.

Working with Fields in a Document

To change the text formatting for a field, select the entire field by dragging across it (either the field results or the field code, whatever is showing at the moment), and use any of Word's formatting commands: press ⌘-I for italics, choose a font or font color from the Formatting Palette, and so on.

Tip: If you format fields this way, make sure that the "Preserve formatting during updates" box is turned on in the Field dialog box (see Figure 6-16). Otherwise, the field will revert to its original formatting whenever you *update* it (see below).

Displaying fields

When you look at a field in your document, you may see one of two things: the field code (which looks like intimidating gobbledygook) or the result of the field code. For example, when you insert the DATE field into a document, it might show up either as *{CREATEDDATE\@"m/D/YY"*MERGEFORMAT}* (the field code) or simply *11/2/01* (the result).

If you're seeing one of these but you'd rather see the other, Control-click the field; choose Toggle Field Codes from the contextual menu (or click inside the field and then press Shift-F9).

Or, to switch *all* fields in your document between showing field codes and results, press Option-F9.

Updating fields

Because fields are just placeholders, the information that eventually fills them will change from time to time. The date changes, for example, or you may change your user information (which affects AUTHOR fields).

Word doesn't update fields *while a document is open.* In other words, if you choose ⌘→Control Panels→Date & Time and change your Mac's date, any date fields in your open documents don't reflect the change. However, if you change your Mac's date and then *open* a document with date fields, Word does automatically update them upon opening.

Tip: If you like, Word can update your fields automatically each time you print. The secret is to choose Edit→Preferences→Print tab and turn on the "Update fields" box.

Locking, unlocking, and unlinking fields

There will be times, especially when you send someone else a copy of your document, when you really don't want anyone to change your carefully planned field codes. To protect a field from changes, click in it and press ⌘-F11. This *locks* the field, meaning that you can't update the field or edit its code. You can still format the field results. (To lock all fields in the document at once, press ⌘-A, then ⌘-F11.)

To unlock a field and enable updating and editing again, select the field and then press ⌘-Shift-F11.

If you *really* want closure on a field, you can freeze it in time forever with its current results. To do so, click in the field and press ⌘-Shift-F9. Unlinked from its code, the field is now ordinary Word text. It's no longer a field and will never be automatically updated.

Field printing options

Normally, you'll want to print your document with the field results; you want people to see a date, not { DATE MMMMd, yyyy * MERGEFORMAT }. However, it is possible to print out a copy that shows the field codes, so that a technical-type person can look them over, for instance. To do so, choose Edit→Preferences→Print tab and turn on the "Field codes" box (under Show).

Bookmarks

Bookmarks in Word are the digital equivalent of folding down the page or underlining a paragraph that you want to refer to later. You can use bookmarks in long documents as you write them, perhaps to mark places that need more work later, or in Word documents you get from others, to mark places that you have questions about

or pages that you're going to use most often. Because you give each digital bookmark a *name*, it's easy to jump to specific spots in a long (or even short) document.

Adding Bookmarks

Select the word, phrase, or paragraph that you want to bookmark, or just click in the text at the appropriate spot. Choose Insert→Bookmark (or press ⌘-Shift-F5), and give your bookmark a name in the "Bookmark name" box (see Figure 6-18). Be descriptive and specific. And use underlines instead of spaces; Word, in its ornery way, doesn't permit spaces in bookmark names. Furthermore, you can use numbers in a bookmark name, but not as the first character, and there's a maximum length of 40 characters.

Click Add or press Return when you're done.

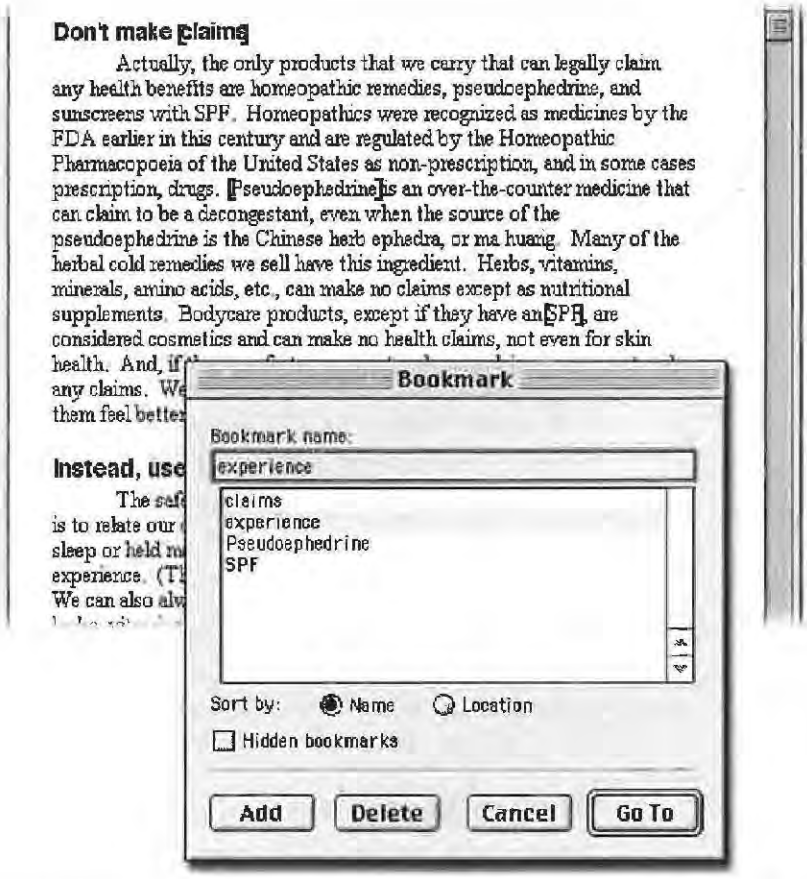


Figure 6-18:
Top: Bookmarks in a document are shown by heavy brackets.

Bottom: All bookmarks you've inserted appear in the Insert→Bookmark dialog box, which is also where you name new bookmarks. (If the Add button is grayed out, you've typed an invalid name; backspace and try again.)

Deleting Bookmarks

To delete one or more bookmarks, press ⌘-Shift-F5 or choose Insert→Bookmark, click the name of the bookmark you want to discard, and click Delete. Of course, your other option is to delete the text or graphic object (if any) that the bookmark is attached to. When the text or image goes away, the bookmark goes with it.

Navigating by Bookmark

After you've scattered bookmarks throughout your document, you're ready for the fun part: leapfrogging from one bookmark to another, skipping all the extraneous stuff in between. Your choices are to take Word's word for it that you're at a bookmark, or make all bookmarks visible as described below.

Note: What happens when you leap to a bookmark depends on what was selected when you created it. If you had highlighted text or graphics before choosing Insert→Bookmark, that text or object is selected when you jump to it. If you had only clicked in some text *without* highlighting anything, you get a blinking insertion point at the bookmark when you jump to it—that's all.

- **Use the Bookmarks dialog box.** To go directly to a bookmarked location, press ⌘-Shift-F5 or choose Insert→Bookmark; the Bookmark dialog box lists all the bookmarks you've created. Double-click the name of a bookmark. The insertion point moves to the selected bookmark; the Bookmark dialog box remains open so that you can repeat the process. Press Return or click Close to dismiss it.
- **Use the Go To command.** Another way to travel to a particular bookmark is to press F5, ⌘-G, or choose Edit→Go To. Any of these actions opens the Go To tab of the Find and Replace dialog box (see page 64). In the "Go to what" list box at left, click Bookmark and choose a bookmark name from the menu at right.
- **Use the Navigator buttons.** By this time, you're probably wishing there were a Next button on the Go To tab of the Find and Replace dialog box described above. There isn't. But you *can* step through your bookmarks in order.

  Start by using the Go To procedure described above to jump to the first bookmark. Now you can use the Navigator Buttons (see page 22) to go forward and back through your bookmarks, or press the keyboard shortcuts Shift-Page Down and Shift-Page Up instead.

Tip: When using the Bookmark dialog box, checking the Hidden Bookmarks box adds cross-references (see page 224) and bookmark fields (see page 218) to the bookmark list. Now you can use the Bookmark dialog box and the Go To feature to browse, for example, your cross-references.

Viewing Bookmarks

Bookmarks are invisible; even the Show/Hide (¶) button on the Standard Toolbar or Formatting Palette doesn't uncover them. If you really want to see where they lie on your document, choose Edit→Preferences→View tab; turn on the Show→Bookmarks checkbox. (To hide them again, just uncheck the box.)

When visible, text bookmarks are surrounded by thick brackets; location bookmarks appear as big, fat I-bars.

Captions

Captions are labels that identify illustrations, tables, equations created by Microsoft Equation Editor, and other objects by number (see Figure 6-19).

Most people type in captions manually, but Word's captioning feature has huge advantages over the manual method: it can number, renumber, and even insert captions automatically. Letting Word handle the captions not only saves you time, but could potentially save you from repeating a caption number, for instance, or leaving out a caption entirely.

Inserting Captions

To caption an item—table, picture, text box, or some other object—first select it, then choose Insert→Caption. Instead of typing a caption, you *build* it using the Caption dialog box, as shown in Figure 6-19.

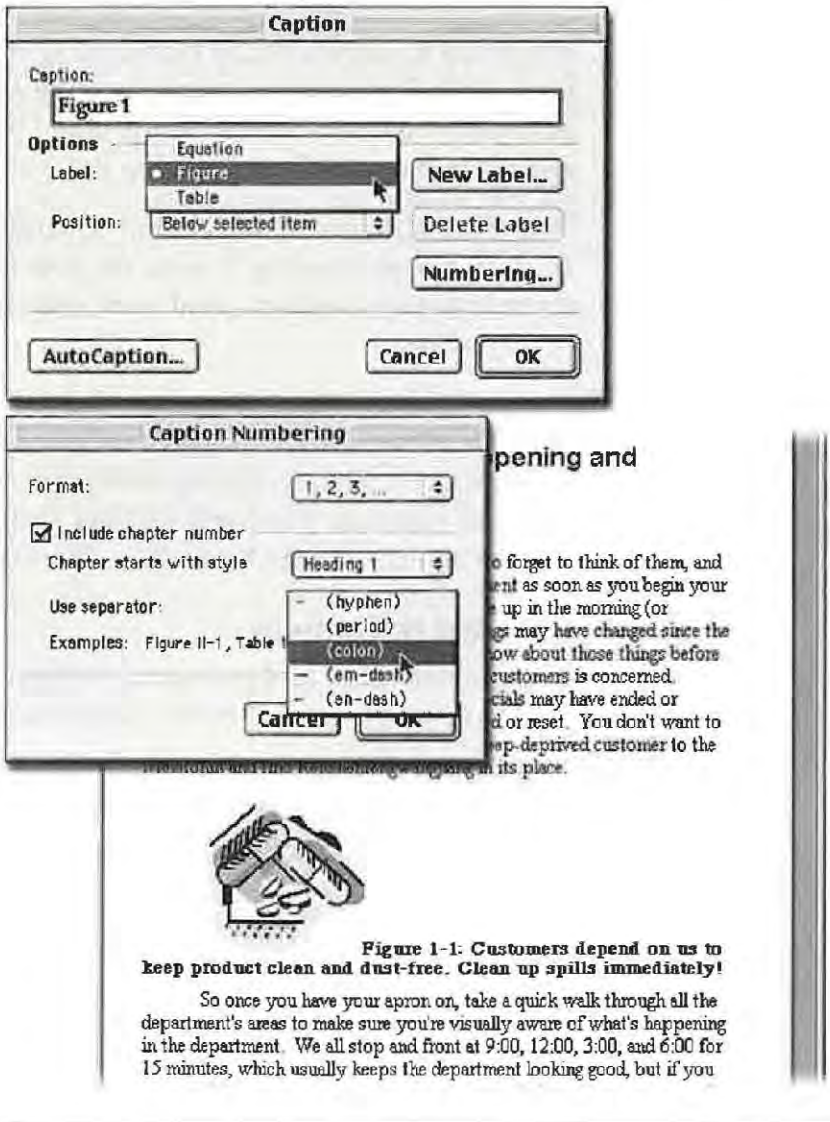


Figure 6-19:
Top: Labels you add using the New Label button appear on the pop-up menu with the three preinstalled labels.

Middle: If hyphens don't do anything for you, you can choose a different separator such as a period, colon, or dash. Because the chapter headings in this document use one of Word's built-in heading styles, figures are automatically numbered 1-1, 1-2, 1-3, and so on.

Bottom: A caption in place. Note that if you're planning to import your Word document into a desktop publishing program, you'll probably lose your captions. The text of the captions may appear, but the numbering will be lost.

- **Caption, Label.** You can't directly edit the words in the Caption box (such as "Figure"), which is how the caption will appear in the document. Instead, this box reflects whatever you select from the Label pop-up menu. If none of the three labels provided (Figure, Equation, Table) strikes your fancy, click New Label and type your own—*Illustration* or *Chart*, for instance—and hit Return.
- **Position.** This pop-up menu lets you choose one of the two most popular places for the location of your caption: above or below the captioned item.
- **Numbering.** Word numbers your captions automatically; that feature, after all, is the whole point of this exercise. Use the Numbering dialog box, as shown in Figure 6-19, to choose a number format (Roman numerals or whatever).

  If you choose to include the chapter number in the captions (perhaps before the hyphen—"Figure 6-20," as in this book, for example), you need to tell Word how to *find* the chapter numbers. A few conditions apply: the chapters must all be within the same document, and you must use one of Word's built-in chapter-heading *styles* (see page 129) for the chapter headings.

  For instance, suppose you've formatted all your chapter headings using the Heading 1 style. Furthermore, suppose you've autonumbered them as described on page 106; you chose Format→Bullets and Numbering→Outline Numbered tab, and selected one of the numbering styles with Heading 1, Heading 2, and so on.

  Now, when you turn on the "Include chapter number" box, as shown in Figure 6-19, and choose Heading 1 from the pop-up menu, your captions include the correct chapter number. (And your chapter headings are automatically numbered, to boot.)

When you finish creating the caption, click OK. The caption (numbered 1) appears in a small text box above or below the selected object. (Unless the selected item was just some text; in that case, the caption appears on a new line below the text.) As you insert more captions, Word will number them in order. (*Deleting* or rearranging captions is another matter, however, as described in a moment.)

Adding Text to Captions

If the caption for your bird picture reads "Figure 1," you can simply click after the 1 and type a description, such as *Blue-footed Booby.*

If you accidentally type over or delete the label or caption number, hit ⌘-Z (or choose Edit→Undo Typing) to restore order. If it's too late to Undo, then your only alternative is to delete and reinsert the caption. The document's captions may then need to be updated (see page 223).

Tip: A neat way to add supplementary text to captions is to click the caption and choose Insert→Caption; you can then type the extra text in the Caption window itself. This technique produces a caption that you can't edit in the document itself.

Deleting and Editing Captions

To delete a caption, select it (or the box around it) and press Delete. To change a single caption—for example, to change Figure 1 to Table 1 (and leave all the other Figure captions untouched—you must delete the caption and insert a new one as described above.

Word's captioning feature makes it exceptionally easy to change *all* captions of the same label at once. For example, if your document has a series of captions labeled Figure 1, Figure 2, and so on, you can easily change them to the more descriptive Photo 1.1, Photo 1.2, and so on. Just select the word Figure in any of the captions and choose Insert→Caption to open the Caption dialog box. Now you can choose a different label, create a new label, pick a different numbering system, and so on. Any changes you make will apply to *all* captions that originally had the Figure label.

Tip: Technically, captions are *fields*, which are described in full on page 213. So if you've used captions in your document, you may start to see strange-looking codes like {SEQ FIGURE *ROMAN} instead of the caption. Don't be alarmed—and don't delete them!

What you're seeing is Word's *field code*—its own, internal geek instructions for creating the caption. You need to tell Word to display the field *results*—the caption itself—instead. To do that, Control-click the field code and choose Toggle Field Codes from the contextual menu.

Or, to return *all* caption field codes back to normal, press ⌘-A (or choose Edit→Select All), Control-click any one field code, and *then* choose Toggle Field Codes. (Be sure to press Control *before* clicking, or you'll undo the Select All.)

Updating Captions

When it comes to automatic caption numbering, Word's fairly good at counting—but not infallible. When you delete a caption or drag one out of sequence, the others don't get renumbered automatically. If you want your figures numbered sequentially, you must *update* the captions after making such a change.

To update a single caption, select it by clicking its box or selecting all of its text; then press F9. (Alternatively, Control-click the caption and choose Update Field from the contextual menu.) Updating all captions in a document at once couldn't be easier: press ⌘-A (Select All), then press F9.

AutoCaptioning

Inserting captions is easy enough, but you can make it downright effortless. Word's AutoCaptioning feature can automatically add a caption to any clip art, picture, or table whenever you add one to your document. Here's how it's done:

1. **Choose Insert→Caption; in the dialog box, click AutoCaption.**

   In the AutoCaption dialog box, you're presented with a list of checkboxes for the kinds of objects Word can automatically create captions for: a picture, a Microsoft Office 2001 Chart, and so on.

Note: AutoShapes are *not* on the list. Captions for AutoShapes and other drawing objects must be inserted manually; fortunately, Word still numbers them correctly along with all the automatically created ones.

2. **Turn on the boxes—as many as you wish—for the kinds of graphics you want captioned.**

   You can have more than one kind of label in your document, and you can choose different object types for each one. For example, you can use "Table A" for tables and "Figure 1" for pictures and charts. To do so, turn on the "Microsoft Word Table" box and go on to step 3; choose "Table" for the labels. Then repeat the procedure, turning on the boxes for the items to which you want to apply the "Figure" label. You can have as many kinds of labels AutoCaptioned at once as you like, provided you can keep them all straight in your head!

3. **Using the pop-up menus, choose a label and a position for the captions.**

   When you check a box as described in step 2, you may notice that the Label menu changes. Word is suggesting a label for that type of object. You can override it by making a different choice from the Label menu.

   The label and position choices here work as described on page 222; as before, you can create new labels now by clicking the New Label button.

4. **Choose a numbering style for the AutoCaptions.**

   If you're using more than one type of caption label, each can have a different numbering style.

5. Click OK.

Now you can insert the pictures or tables in your document. The captions will appear automatically.

Turning AutoCaptions Off

To turn AutoCaptioning off, choose Insert→Caption, click AutoCaption, and uncheck the boxes for the captioned objects. All existing captions stay as they are, but no new ones will be added automatically.

Cross-references

In long, technical, or scholarly documents, you frequently find phrases like "see Chapter 12" or "see Figure 8 on page 313." These are *cross-references*—words that refer the reader to another place in the document. Of course, you can always type your own cross-references—but what a mess you'll have when you decide to cut a few pages from the first chapter, and all 1,424 of your cross-refs now point to the wrong page numbers!

Word stands ready to create smarter cross-references that update themselves no matter how you edit your document. What starts out saying "See page 24" will change automatically to say "See page 34" after you insert a ten-page Introduction.

Remember these two principles as you start on the road to becoming a master cross-referencer:

- Word thinks of cross-references as pointing to *objects* in your document, not places.

  In other words, a cross-reference must be connected to a figure, bookmark, or a heading.

- Cross-references can only refer to something within the same document.

  If you're creating a document with multiple chapters, you must combine them into one Master Document (see page 205) before working with cross-references.

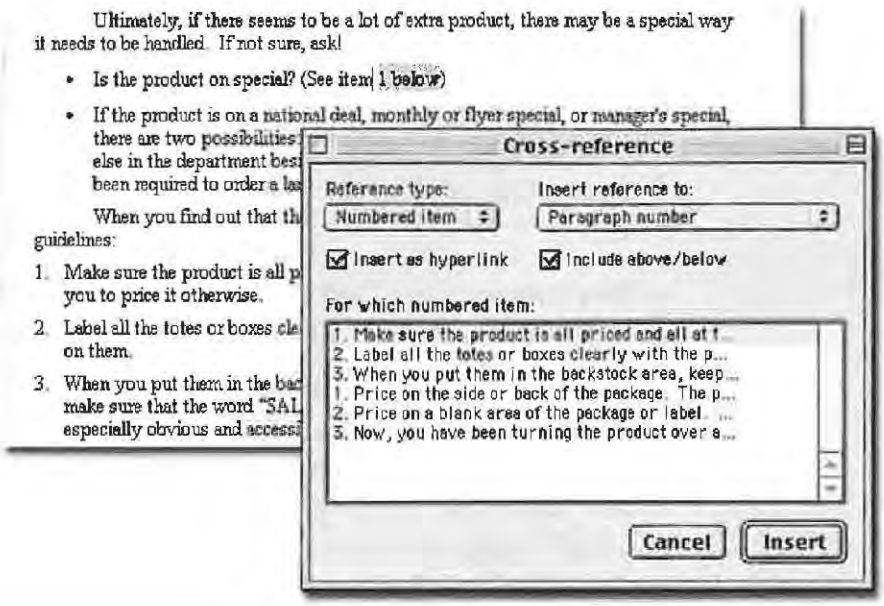


Figure 6-20:
Top: A clickable cross-reference in place. When you click the gray shaded phrase "1 below," your document scrolls automatically to the corresponding paragraph.

Bottom: This dialog box shows all the bookmarks, figures, or other landmarks in your document. Clicking the "Insert as hyperlink" box turns the text of the cross-reference into a clickable link.

Inserting Cross-references

When creating a cross-reference, start by typing appropriate lead-in text into your document: *See, Turn to, As shown in,* or whatever you like. Then it's time to get Word involved.

Here, for example, is how you might build a cross-reference that reads, "See Figure 1 below" (see Figure 6-20).

1. Type *See Figure;* then choose Insert→Cross-reference.

   The Cross-reference dialog box appears.

2. **Make a selection from the "Reference type" pop-up menu.**

   The list contains only the things that Word can recognize as a cross-reference: a figure (anything with a *caption*, as described in the previous section); a Word table; any text that's formatted with one of Word's built-in headings or numbered lists; an equation created with Microsoft Equation Editor; or a footnote, endnote, or bookmark.

Tip: If you don't use any of the above items in your document, but just want to refer to some text, you can always bookmark it (see page 218). For instance, if you want a cross-reference to read "See the discussion of komodo dragons on page 30," first go to page 30 and bookmark the paragraph where you talk about komodo dragons. Name the bookmark "komodo dragons." Now go to where you want to put in the cross-reference, choose Bookmark in the "Reference type" menu, and continue as described below.

---

3. **Choose the specific item you're cross-referencing in the "For which" list box.**

   In Figure 6-20, "Numbered item" is the chosen reference type; the "For which" box lists all the numbered items in the document, which happens to be an employee training manual. If you had chosen "Bookmark," all the bookmarks you'd created would be listed, and so on. From this list, choose the correct destination for this particular cross-reference.

4. **In the "Insert reference to" menu, specify what you want the reference to point to.**

   You have a choice of the actual text (of the caption or paragraph), the number (of the page, list item, or outline paragraph), or simply "above" or "below."

   In other words, here's where you finally get to tell Word what you want the cross-reference to *say*. In Figure 6-20, the choice "Paragraph number" places the number "1" in the cross-reference after the typed word "See." If you were to go back and renumber the list in the training manual, the number in the cross-reference would change automatically.

Note to attorneys: Select the "Numbered item" reference type to cross-reference numbered paragraphs in legal documents. The "Paragraph number (no context)" and "Paragraph number (full context)" options in the "Insert reference to" menu were created just for you. "Full context" names a cross-referenced paragraph by the entire string of outline numbers: 1. (a) (i), and so on. Use "no context" to refer the same paragraph simply as (i).

   If **above/below** is not one of the choices on the "Insert reference to" menu, turning on the "Include above/below box" adds "above" or "below" to the end of the cross-reference, as shown in Figure 6-20.

   Thereafter, no matter where you move the referenced item within the same document, Word will change "above" to "below," or vice versa, as necessary.

5. **Click Insert or press Return when you're done creating the cross-reference.**

Modifying, Deleting, and Cross-references

To change a cross-reference, in case you've changed a figure or divided your document into two shorter ones, just select it, choose Insert→Cross-reference, and modify the settings. In this way, you can change a cross-reference to Figure 2 instead of Figure 1, for example.

To delete a cross-reference, select it and press Delete. (When selecting a cross-reference, drag over only the shaded part, as shown in Figure 6-20; do not include any additional text you've typed.)

Note: You can't create a cross-reference to a caption (see page 221) inside a *text box* (see page 144). If you need to keep the text and caption inside a box, you can change the text box into a *frame*. See page 152 for more detail on working with frames.

Like captions, cross-references are a type of *field* (see page 213); like captions, cross-references can sometimes spontaneously combust. You fix them as you would broken captions. For example, if you run across a string of cryptic characters like {REF_Ref372221765\r\p } instead of the cross-reference you were expecting, Control-click the shaded part of the cross-reference and select Toggle Field Codes from the contextual menu.

Again like captions, although Word updates cross-references automatically when you move text in your document, it sometimes misses a few. Therefore, as part of putting the finishing touches on any document in which you've used cross-references, press ⌘-A and then press F9. You've just signaled Word to update all cross-references (and captions, for that matter).

Creating a Table of Contents

Word's Table of Contents (TOC) feature shines in its versatility. Once you've built a table of contents in Word, you can use it to navigate your document (just as you might with the Document Map); you can custom format it to get just the look you want; you can save yourself the task of updating page numbers if you add or delete text from your document (which can be a major pain); and you can use it as a Web site map (because in Online view, a Word Table of Contents is automatically hyperlinked).

TOC the Easiest Way: Using Built-in Headings

If you have a well-organized document and have used Word's outliner or one of its built-in heading styles (Heading 1, Heading 2, and so on) to introduce each new topic, Word's Table of Contents feature was made for you. See step 1 below.

If you wrote your document without headings, though, insert them before creating the table. (Use heading styles, as shown on page 131.) Be descriptive when you type the headings; instead of just "Chapter 10" or "Advanced Techniques," use "Chapter 10: Underwater Architecture" or "Advanced Card-Counting."

Creating a Table of Contents

When you're ready to smack a table of contents on the first page of your masterwork, proceed as follows:

1. **Click where you want the TOC to begin.**

   To put the TOC on the first page, click at the very beginning of the document. But you can also insert it after a title page or introduction, for example.

2. **Choose Insert→Index and Tables→Table of Contents tab.**

   You should now be staring at the Index and Table dialog box (Figure 6-21).

3. **Choose a style in the Formats box, as described in Figure 6-21.**

   If none of the format styles thrills you, choose "From template" and see "Custom Formatting" below.

4. **Decide how many levels you want to show, using the "Show levels" control.**

   For example, you may want your table of contents to show only chapter titles; in that case, choose 1 in the "Show levels" box. If you have divided your document into many levels of detail, each with its own heading level, you may want to show only the first two or three levels to keep the table from getting too long. (The

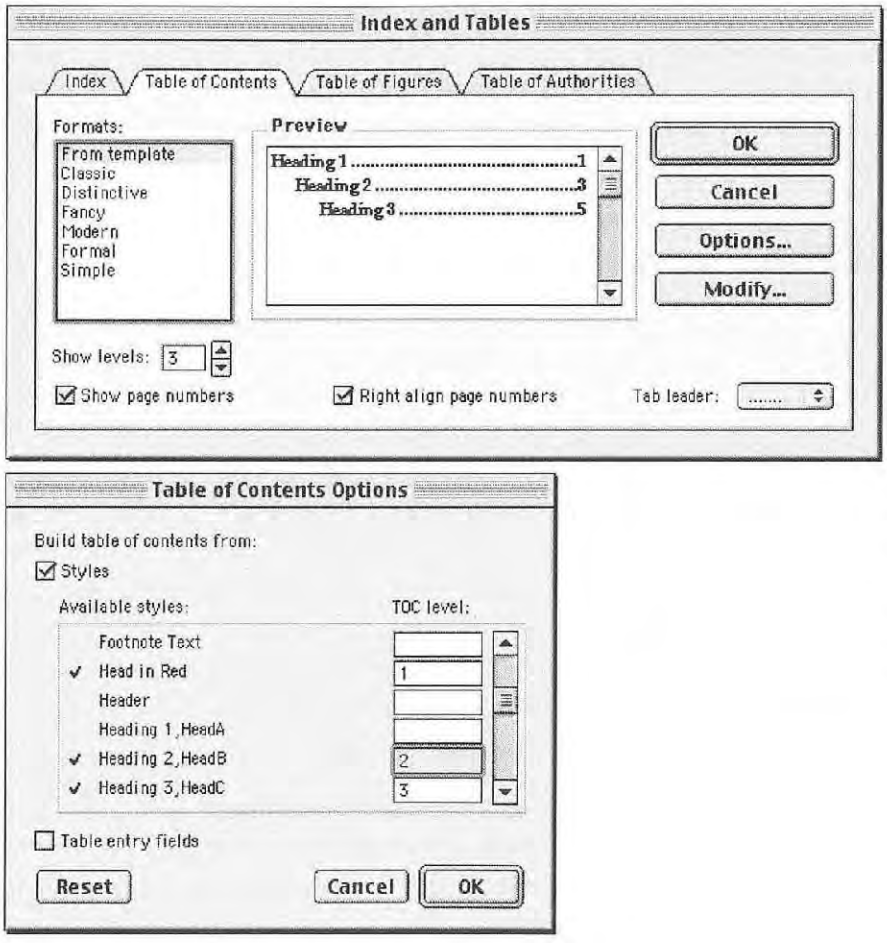


Figure 6-21:
Top: The "From template" format uses the styles in the current document template and results in a consistent appearance with the rest of your document. (See page 129 for more on styles.) Click on each one and look in the Preview window; choose the one that makes the best impression.

Bottom: The Options dialog box lets you build your table of contents from styles you've used in your document other than Heading 1, Heading 2, and so on. Here, a style called Head in Red is being turned into the primary "chapter" style (the Level 1 style) for the table of contents.

table of contents in this book, for example, shows chapter titles and the first-level subject headings.)

5. **Format the page numbers.**

   Most printed tables of contents include page numbers, of course, but if you're preparing a document for the Web where page numbering is irrelevant, you can turn off "Show page numbers."

   If you elect to use page numbering, you can also indicate whether you want the page numbers to be right aligned (as in the Preview window in Figure 6-21) and what style of Tab leader you want (the dots, spaces, or lines that connect each title with its page number). (The Preview window in Figure 6-21 shows a dotted line, but the "Tab leader" menu offers several other choices.)

6. Click OK.

   You return to your document. If you switch into Page Layout view (View→Page Layout), you'll see the table of contents (see Figure 6-22).

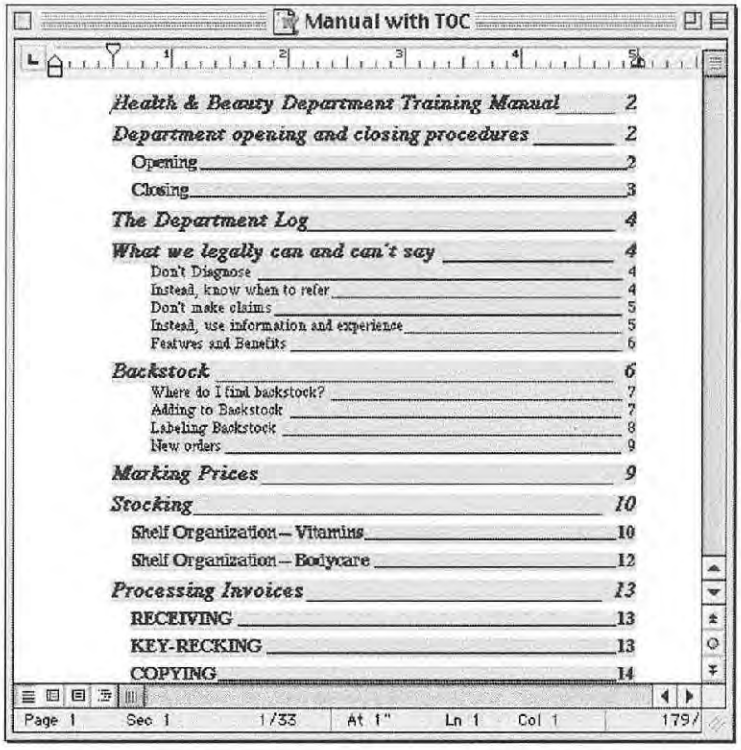


Figure 6-22:
A Table of Contents created from the headings in an actual Word document using the "Distinctive" format. The gray doesn't print; it simply tells you, the editor: "These are fields, and I, Microsoft Word, will be responsible for maintaining and updating them. Don't try editing anything here yourself."

TOC the Harder Way: Using Other Styles

Life is easiest if you use Word's built-in heading styles (Heading 1, Heading 2...) when preparing your manuscript—but that's not your only option. If your document is delineated by other styles, whether built-in or ones you've created (see page 129), you can use those as the basis for your Table of Contents headings instead.

To do so, chose Insert→Index and Tables→Table of Contents tab. Follow steps 1 through 5 above, and then click Options.

In the Table of Contents Options dialog box, you see a scrolling list of all styles in your document (see Figure 6-21). If you scroll down, you'll see that Heading 1, 2, and 3 have been assigned to corresponding TOC levels. This is your opportunity: Delete the numbers from these Heading styles and type new TOC level numbers (1, 2, and so on) into the boxes next to your own styles, exactly as shown in Figure 6-21.

Tip: You can even type each level number next to more than one style. For instance, if you want your captions to be listed in the table of contents under each main topic, the way your Level 3 headings are, just type 3 in the box next to Caption (in the dialog box pictured in Figure 6-21.)

In fact, you don't even have to use different levels: if you make *every* heading style Level 1, every item in your table of contents will have equal weight—no indents or typeface changes.

Click OK and go back to the Preview box to check your work.

Updating or Deleting a Table of Contents

Like many Word features, TOCs rely on self-updating, noneditable blocks of gray-background text called *fields*, as described earlier in this chapter. As you may recall, Word updates the results of its field calculations only when you *open* the document. If, during an evening of sleepless self-doubt, you decide to rewrite the names of the different sections in your thesis, it may come as something of a shock to discover that your table of contents still shows the original section names. And if you cut out that 31-page digression into the mating habits of the Venezuelan beaver, you may be surprised to discover that the table of contents page numbers haven't been updated to reflect the new, shorter status of your paper.

The solution is simple: After editing your document and before printing or sending it, update the table of contents by *updating* its fields. To do so, click at the left side of the first line of the TOC, and then press F9.

Tip: The field-editing process *wipes out* any formatting or editing you've done to the text in your table of contents—which is an excellent argument for formatting your TOC using the dialog boxes as described on page 228 instead of formatting them by hand.

POWER USERS' CLINIC

Custom Formatting the Table of Contents

You can change the typographical look of your TOC headings just as you would any style (see page 129 for more on styles). Just choose Format→Styles, click the TOC1 style name, click Modify, and proceed as described on page 133. Click OK to return to the Style dialog box. Click the next TOC heading level, click Modify again, and repeat until you've designed a table of contents to call your very own.

To dispense with a TOC, click at the very beginning of the first line of the table of contents. Press Shift-F9 to display the TOC field code against its gray background ({TOC\o"1-3"}, for example). Select the entire field code, brackets and all, and press Delete. You've just vaporized all remnants of the Table of Contents.

Table of Figures and Table of Authorities

Creating a table of figures or table of authorities is very much like creating a table of contents. Word takes captions (for the table of figures) or citations (for the table of authorities) and compiles them into a table. You can custom design type styles just as in a TOC, and you can update and delete these tables exactly as described above. There are only a few differences.

Table of Figures

If you've inserted captions for pictures, tables, graphs, or equations in your document (see page 221), Word can list them in a table, along with their page numbers and tab leaders, just as in a table of contents. The steps for creating one are precisely the same as creating a table of contents (page 227), except that you click the Table of Figures tab in step 2 instead of Table of Contents.

Table of Authorities

Lawyers, legal secretaries, and paralegals: this section is for you. In fact, nobody else is likely to know what a table of authorities *is*.

A table of authorities doesn't use existing document styles like headings or captions. You have to mark each citation (case, statute, or document) that you want the TOA to use. To create a table of authorities in Word, follow these steps:

1. **In your document, select a citation.**

   For example, highlight "Title 37, Code of Federal Regulations, Section 1.56(a)."

2. **Choose Insert→Index and Tables→Table of Authorities tab. In the dialog box, click Mark Citation.**

   The keyboard shortcut, for the nimble-fingered, is ⌘-Option-Shift-I.

3. **Select the current citation type in the Category menu.**

   If you want to use a category that's not shown, click one of the numbers (8 through 16) in the menu. Type the new category in the "Replace with" box; click Replace.

4. **Edit the text of the citation in the "Selected text" box.**

   Do this only if you want the citation to appear differently in the table of authorities. Add boldface or underscores, for example.

5. **Type an abbreviated version of the citation in the "Short citation" box.**

   In the next step, Word is going to search for the next occurrence or occurrences of this citation. If you used a specific abbreviation in your document, use that here as well—"Title 37," for instance.

6. **Click Mark or Mark All.**

   If you want to go through your document and find citations individually, click Mark and then click Next Citation. To let Word find, and automatically mark, all long and short versions of the current citation, click Mark All. Word marks citations with TA *field codes* (see page 213).

7. **After marking all your citations, click Close.**

   The Mark Citation box goes away.

When you're done marking the citations, it's time to create the table itself.

1. **Click where you want the table of authorities to begin. Choose InsertÆIndex and Tables→Table of Authorities tab. Choose from the category menu.**

   You can make a table of authorities for All citations, or do one category at a time. If you formatted citations in the "Selected text" box (step 3 above), be sure to check the "Keep original formatting" box.

2. **Choose a design in the Formats box and continue formatting your table.**

   See page 228 for more detail on formatting.

3. **Click OK.**

If you add a new citation after completing the table of authorities, it's easy to add it in. Just select the new citation, press ⌘-Option-Shift-I and follow steps 3 through 7 in the first set of instructions above.

To update a table of authorities, click at the very beginning of the table and press F9. The rules in "Updating or Deleting a Table of Contents" (on page 230) apply.

Indexing

Although Microsoft may hate to admit it, few people actually use Word to publish books. Most "real" books may be *written* in Word, but they're usually then poured into a proper page-layout program like PageMaker, QuarkXPress, or In Design for the rest of the process.

That doesn't stop Microsoft from wishing its word processor were up to the challenge, though. As evidence, here's Microsoft's indexing feature, which can spew forth a professional-looking index for a document, complete with page numbers, subentries, and the works. (The operative word, however, is *can;* indexing involves considerable patience and tolerance on your part. As you'll soon find out, indexing often involves your descending into Word's sub-basement of field codes, a pseudoprogramming language that's not intended for casual experimentation.)

Phase 1: Create Index Entries

As smart as Word 2001 is, it can't read your document and ascertain what the important topics are; you have to tell it which concepts you want indexed.

You do so by reading over each page of your document. Each time you come to an important point that you want included in the index, do the following:

1. **Select the word or phrase that you want to index.**

   For instance, in a book about birds, you might want to create an index entry for *eggs*. So you'd highlight the word *eggs* in the manuscript.

2. **Press ⌘-Option-Shift-X.**

   You could also choose Insert→Index and Tables→Index tab and then, in the dialog box, click Mark Entry, but life's too short.

   ⌘-Option-Shift-X is a keystroke well worth learning (or redefining to something easier—see page 581), because you'll be using it a lot. It opens the Mark Index Entry dialog box, shown in Figure 6-23.

3. **Choose Bold or Italic for the page number, if you like.**

   You can use this feature to make the principal mention of the indexed term boldface or italic to make it stand out from the rest of the page numbers for the same term—to indicate a page where an illustration appears, for example (eggs, 9, 11–13, 34, 51–52).

4. **Specify a subentry, if applicable.**

   For instance, if the material on the current page is mainly about yellow-bellied nuthatch eggs, you may want the index to show "yellow-bellied nuthatch" as a subentry under "eggs" (see Figure 6-23). Type *yellow-bellied nuthatch* in the Subentry box. Word assumes that you want this particular phrase indexed as a subentry under "eggs" (or whatever your main entry was in step 1).

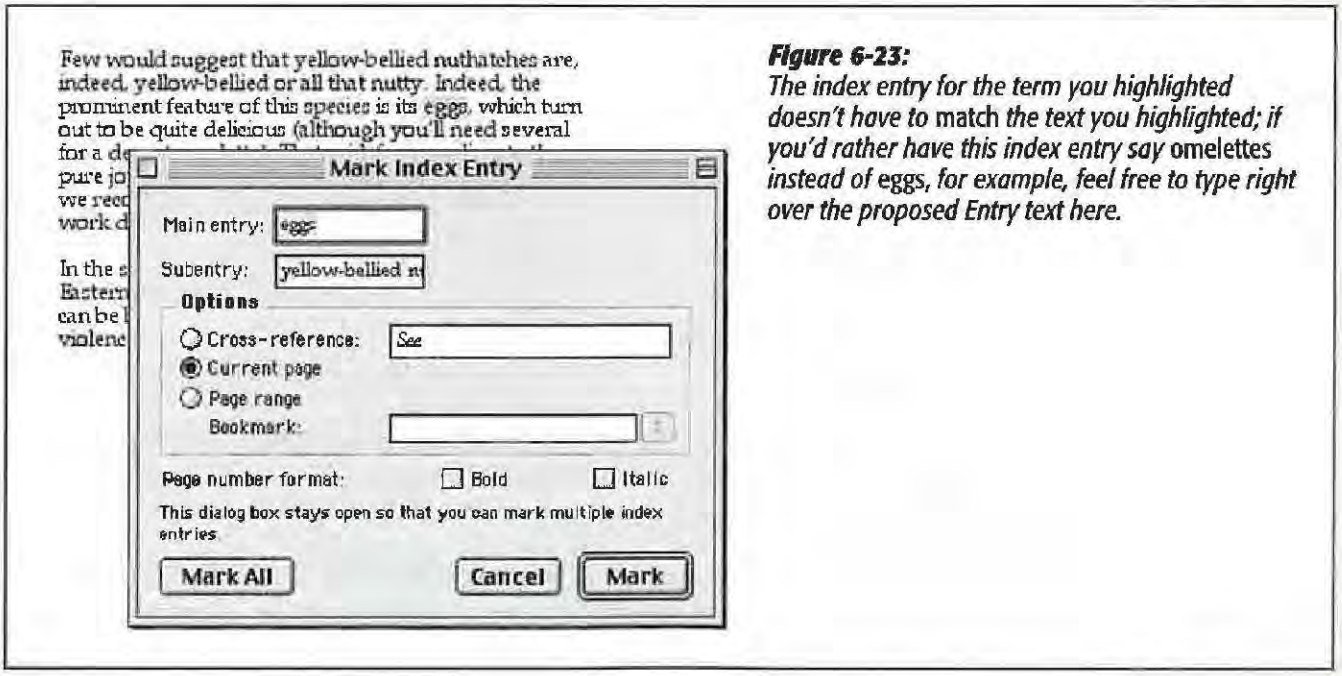


Figure 6-23:
The index entry for the term you highlighted doesn't have to match *the text you highlighted; if you'd rather have this index entry say* omelettes *instead of* eggs, *for example, feel free to type right over the proposed Entry text here.*

5. **Click Mark to create an index entry for your selected word or phrase.**

   If you click Mark All instead, Word creates an index entry for *every* occurrence in the document of the word or phrase you selected in step 1. (It flags only the *first* occurrence in each paragraph—after all, the purpose of the index is to direct the reader to the correct paragraph or page; to index *every* occurrence would make for an overlong, cumbersome index.)

Note: Mark All is case-sensitive. In other words, Mark All will create entries for each occurrence of *eggs*, but not *Eggs*.

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6. **Highlight the next entry in your document.**

   The dialog box remains open even after you click Mark or Mark All. However, to move on to the next entry, you have to select another word or phrase and press ⌘-Option-Shift-X again.

7. **Proceed through your entire document, marking each entry you want in the index by highlighting it and then pressing ⌘-Option-Shift-X.**

   A *field code* (see page 213) appears in your document after each term you've indexed. Because these fields are hidden text, Word turns *on* the Show/Hide ¶ button on the Standard toolbar (see page 27); that's why you see line breaks, paragraph breaks, and any other hidden text in addition to the Index field codes.

8. **Click Close.**

   Now you're ready to build the index as described on page 236.

Cross-references

A cross-reference in an index looks like this: "eggs, *See reproduction.*" It tells your reader: "*You* may be looking under Eggs, but actually I've listed all of these entries under Reproduction." (Of course, if you create a cross-reference for "reproduction," you have to actually create index entries for that topic!)

To create a cross-reference, follow the steps above; but before clicking Mark Entry in step 3, type the cross-referenced term into the "Cross-reference" box. The word "See" already appears in the "Cross-reference" box; you can just type text after it (or over it). For instance, you can change it to "See also" or just "also."

Page range entries

Occasionally, the information related to your index entry spans several pages, like this: "eggs, 9–19." Unfortunately, Word requires that you *bookmark* the range of pages before creating the index entry. To do so:

1. **Select the entire block of text that you want indexed, even if it's many pages long. Choose Insert→Bookmark; name the bookmark in the "Bookmark name" box, then click Add.**

You can name the bookmark anything, because this name doesn't affect the index entry name. If this is the first mention of eggs in the document, for example, you could call it Eggs1. (See page 218 for more on bookmarking.)

2. **Back in your document, click at the end of the selected bookmark text.**

   This tells Word where to mark the index entry field.

3. **Press ⌘-Option-Shift-X.**

   The Mark Index Entry dialog box appears.

4. **Type the index entry as described on page 233, but then click "Page range" and, from the pop-up menu, choose the name of the bookmark you just created.**

   This menu contains all the bookmarks you've created so far in the document you're indexing.

5. **Click Mark and continue creating index entries, if you wish.**

When you later create the index, the range of pages you bookmarked will appear next to the index entry.

Phase 2: Editing Index Field Codes (Optional)

Like many Word features, Word's indexing feature relies on *fields* (invisible placeholders, as described on page 213). Because index entry fields are marked as hidden text, you can only see them when the Show/Hide (¶) button, on the Standard toolbar or Formatting Palette, is on. At that point, the indexing codes show up, looking something like this: { XE "eggs" \r "eggs1" }.

In other words, if you'd like to see the field codes—so that you can delete them, edit them, or just see where they are—click ¶ on the Standard toolbar or the Document section of the Formatting Palette.

POWER USERS' CLINIC

Indexing On a Deadline

If time doesn't allow reading your entire document for the topics you'd like to index, there's a quicker way. As long as you can find any one occurrence of a topic you want to index, Word can find and mark the rest.

Skim the document. Each time you spot an important topic, select it and press ⌘-Option-Shift-X. When the Mark Index Entry dialog box opens, click Mark All. Word marks all occurrences of that word as index entries.

The neat thing is that the word you select doesn't have to be the first occurrence in your book. Mark All works in both directions, back to the beginning and out to the end of the document.

Finally, click Close and proceed as described under "Building the Index" on page 236. You can always redo or expand the index later, when time allows. Just select any word or phrase you want to add to the emergency index, and proceed as described on page 235.

Even if you don't have time to mark both singular and plural, capital and lowercase versions of each topic, you will end up with a legitimate index of major topics.

Once you've made your field codes visible, you can edit or delete them. To delete an index entry, select it by dragging over its field code, including the brackets, and then press Delete.

Unless you want to fool around with editing field codes, deleting an entry is also the easiest way to *edit* an entry; after deleting the faulty field codes, simply create a new, replacement entry, as described on page 232.

If you're unafraid to edit field codes directly, however, here's how to edit the four kinds of index field codes:

- **Single page entry** (eggs, 234). The field code looks like this: { XE "eggs"\b }. If you misspelled the main entry, want to change the capitalization, or whatever, you can edit the word between the quotation marks. But be careful not to disturb any other part of the code, including the spaces. Also in this example, the *b* after the backslash indicates boldface; an *i* here stands for italic. To change a boldface page number to plain text, for example, delete both the letter and the backslash.
- **Cross-reference entry** (eggs, *see* reproduction). The field code looks like { XE "eggs" \t "*see* reproduction" }. In addition to editing the main entry, you can also change the cross-reference (reproduction), or the additional text (*See*). Again, be careful not to disturb any other part of the code.
- **Page range entry** (eggs, 234-236). The field code looks like { XE "eggs" \r "Eggs1" }. This one's tricky to edit, because in order to change the range bookmark name (see "Page range entries" above), you have to type in the *exact* name of the bookmark. However, you can change this into a single-page entry by deleting the bookmark name with its quotes, the backslash, and the *r*. And of course, you can edit the main entry name.
- **Subentries** (eggs, robins', 21). The field code looks like { XE "eggs:robins'" }. The main entry is before the colon, the subentry is after. You can edit either one, and also create additional layers of subentries just by adding another colon followed by another subentry, and so on.

Phase 3: Building the Index

Once you've marked index entries in the document you're indexing, you can generate the index itself:

1. **If the field codes in your document are showing, turn off Show/Hide by clicking ¶ on the Standard toolbar to hide them.**

   This step ensures that your document is paginated correctly; when field codes are showing, they take up room just like words and throw off the page numbers.

   Most of the time, you'll want to insert a page break or section break just before the index, so that the index will begin at the top of a new page. Then:

2. **Click in your document where you want the index to begin. Choose Insert→Index and Tables→Index tab.**

The Index and Tables dialog box opens, as shown in Figure 6-24.

3. **Choose a Type radio button to specify the layout of your subentries.**

   If you click Indented, each subentry appears indented under the main entry. If you click Run-in, all entries in the index are flush left, as shown by the Preview.

4. **Choose a Format from the Formats list.**

   If you choose "From template," Word uses the *styles* (page 129) in your current template. To see what the other canned index designs look like (Classic, Modern, and so on), click each and view the results in the Preview window.

5. **Choose a number of columns in the Columns box by clicking the arrows or entering a number.**

   You can choose one, two, three, or four columns per page. To save space, most indexes use a multiple-column format. If your document already *has* columns, choose Auto to make your index match the same number of columns.

POWER USERS' CLINIC

AutoMarking Long Documents

If your document is very long, going through it to find each item to mark can be an exercise in tedium. Although the Mark All button helps (see page 235), Word's AutoMark feature can speed up the process even further. However, this feature is only worth using on very long documents, maybe 100 pages or more, because there's an extra step that offers its own brand of tedium: creating a *concordance file.*



egg	eggs
eggs	eggs
laying	eggs
reproduction	eggs
Egg	eggs
Eggs	eggs
robin's eggs	eggs:robin's
hen's eggs	eggs:chicken's
chicken's eggs	eggs:chicken's
Chicken's eggs	eggs:chicken's
Henhouse	eggs:chicken's
henhouse	eggs:chicken's

A concordance file is a Word document with a two-column table that you create yourself (see page 155) from a blank document. In the first (left) column, you type the text that you want Word to look for and mark in your document. In the right column, you type the index entry itself, which may not necessarily be the same term. (Using this technique, you can index, under *printing* five pages of discussion about *dot-matrix printers, laser printers, fonts,* and *ink cartridges;* the actual word *printing* may never appear in the text.)

Another example: You could type *egg, eggs, Egg, laying, reproduction* in the left column (each in its own cell), and *eggs* directly across from each in the right cell (as shown here). (To create a subentry, use a colon, also as shown in the illustration.) At the end of this exercise, Word will find each word in the left column and index it under the term you've specified in the right column—all of the sample terms shown here, for example, will be indexed under "eggs."

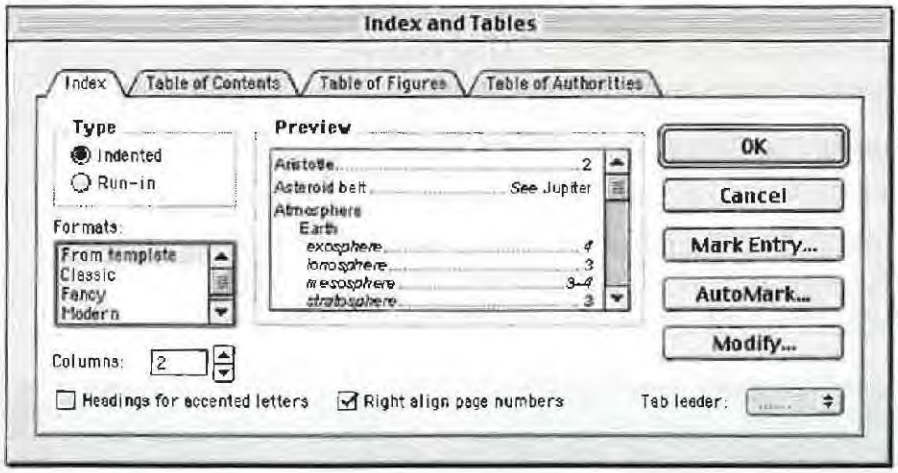
After logging each important term in your document this way, save and close the concordance file. Then open the manuscript document. Click at the end of the document, and then choose Insert→Index and Tables→Index tab.

In the resulting dialog box, click AutoMark. Navigate to, and open, your concordance file. Now Word automatically places index entry fields in the document; you can see them highlighted as you scroll through it. If you missed any major topics, you can create another concordance file and repeat the process.

Now build your index as described on page 236.

6. **Turn on "Right align page numbers" to move the page number out to the right margin of the page or column.**

   When you turn this on, you have the option of using a *tab leader* (dots or dashes between the entry and its page number, as shown in Figure 6-24, which you choose from the small pop-up menu at the lower right.



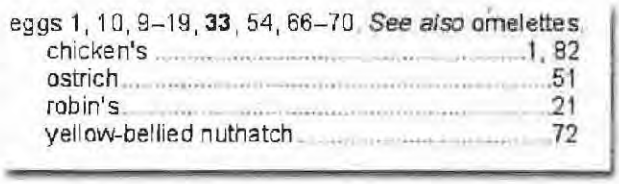


Figure 6-24:
Top: The Index and Tables dialog box shows you a preview of the index you're about to create. If the Preview in your copy of Word–or, indeed, the final index itself–shows text that's crowded and unreadable, it's because you haven't clicked the Modify button and changed the Index1, Index2, and Index3 predefined styles to use the fonts and paragraph spacing you prefer.

Bottom: A sample index entry, with the "Right aligned" and "Tab leader" options turned on.

7. **Click OK.**

   Word creates an index, as shown in Figure 6-24. This will take a few minutes, especially if your document is long. You can stare at the watch icon or go get a snack.

Phase 4: Cleaning Up the index

Once Word has finished building the index, you can edit it as you would any text. You can also revisit it in any of these ways:

- **Reformat the index.** Click the index and choose Insert→Index and Tables; in the resulting dialog box, you can change any of the options on the Index tab, as described above. (Because you clicked the index first, any changes you make will apply to it, even though this dialog box normally creates a *new* index.)
- **Update the index (F9).** If, after sleepless nights of soul-searching, you decide to edit your document by inserting or deleting text, Word doesn't automatically update your index; all of its page numbering is now off. Similarly, if you decide to add, delete, or edit some index entries themselves, they won't be reflected in the index you've already generated.

The solution, either way, is to click in your index and press F9. Word updates the index; as when you created the index, this will take some time.

- **Deleting an index.** To remove an index from your document, click it and press Shift-F9 to see it represented as a field code. Select and delete the entire field code to delete the index.

Tip: Deleting the index doesn't delete the index *entries* you've marked in your document. Usually, you do no harm by leaving them in place, because they're marked as hidden text and generally don't print or show up on the screen. But if you need a genuinely clean document, use the Replace command described on page 65. Using the Special pop-up menu, choose Field–and replace it with nothing. Word will neatly excise them from your file.

Data Merges

If the term *data merge* is new to you, perhaps it's because "data merge" is a kinder, gentler euphemism for its result: *form letters.* A data merge grabs information from a database, automatically filling in the blanks in a Word file ("Dear <<name>>, As a fellow <<city>> resident, I thought you might be interested in contributing <<income>> to our fundraiser") to churn out what seem to be personal, individually written letters. Merging data can also create labels, envelopes, or a catalog.

Having Office 2001 on your Mac puts you at a definite advantage: you get to use all the document-beautifying features of Word (see Chapter 3) to write the placeholder letter, and you have your choice of programs to organize the data. You can use an existing Excel file, your Entourage Address Book, a FileMaker Pro database, or a Word table to supply the data that will get plugged into the generic letter.

The placeholders Word uses when you write the letter are *fields* (see page 213). Because fields can process information like computer code, Word data merge documents are very powerful. You can set them up to prompt you for information before proceeding with the merge ("What amount to ask for?"), for example.

To make these interactive functions easier to use, Office 2001 offers the Data Merge Manager. Just as the Formatting Palette consolidates dozens of different formatting features, so the Data Merge Manager also automates the features you need for four of the most popular merges: form letters, labels, envelopes, and catalogs.

Preparing Data Sources

Before you begin your mail-merge experience, figure out what computer document will contain the *source data*—the names and addresses for your form letters and envelopes, for example, or the items and prices in your inventory database that you'd like to merge into an attractive catalog.

The most common data source is a database of names, addresses, and other personal information. Office 2001 can grab data from Word tables, tab-delimited text files (such as ASCII), Excel files, the Entourage address book, or FileMaker Pro databases.

As you delve into merges, you'll need familiarity with two pieces of database terminology: *records* and *fields*. A *field* is a single scrap of information: the phone number or the shoe size. (This *database* field isn't quite the same thing as *Word* fields described earlier in this chapter—although the *database* kind of field will be represented by a *Word* field in your form letter.) A *record* is the complete set of fields for one form letter, mailing label, or envelope—the name, address, phone, and so on.

Tip: Whether you create a new database for your merge or use an existing one, make sure that each record is done the same way. If you're using a database where the first and last names are in separate fields in some cases and together in one field in others, you're going to have trouble getting the merge to work properly.

Creating a New Data Source

Let's say you don't have the database in electronic format yet; all you have is a bunch of application slips filled out by kids signing up for your hockey lessons. You want to write each student a welcome letter.

The easiest way to start a data source file is to launch Word and choose Tools→Data Merge Manager. You'll see something like Figure 6-25.

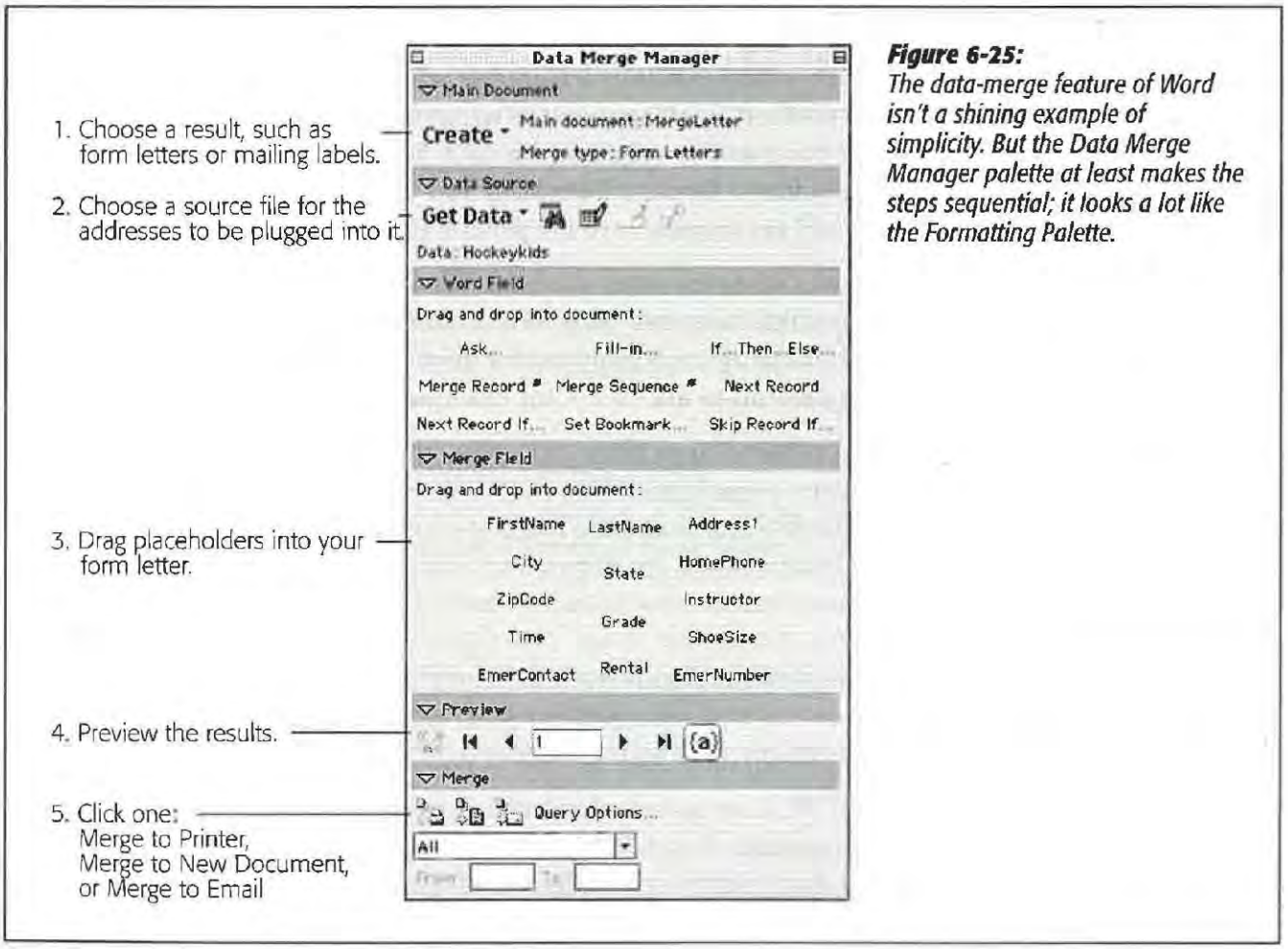


Figure 6-25:
The data-merge feature of Word isn't a shining example of simplicity. But the Data Merge Manager palette at least makes the steps sequential; it looks a lot like the Formatting Palette.

The list of database fields you'll need depends on what you plan to say in the form letter. In the example in Figure 6-26, the coach realized she'd need date, first and last name, address, shoe size, school grade, the instructor name, and the entrance and seating section where the student's hockey class would gather for their first meeting. A few fields already in the database for other purposes—phone number, for example—won't be used in this letter; that's OK.

To create a data source for your project, proceed as follows:

1. **Open the *main document*.**

   "Main document" means the file that will contain the letter itself—the text that won't change from one printout to the next. Choose Tools→Data Merge Manager, if the palette shown in Figure 6-25 isn't already open.

2. **On the Data Merge Manager, choose Create→Form Letters.**

   The file name and type of the main document appear in the Data Merge Manager; it's called MergeLetter in Figure 6-25. As you can see from the pop-up button, Word comes ready to access information from your Office (Entourage) Address Book or a FileMaker database—or to create a new list of data from scratch. That's what you'll be doing in this example.

3. **On the Data Merge Manager's Data Source section, choose Get Data→New Data Source.**

   The Create Data Source dialog box appears; it has a list of suggested fields for form letters. Edit the list of fields, as shown in Figure 6-26.

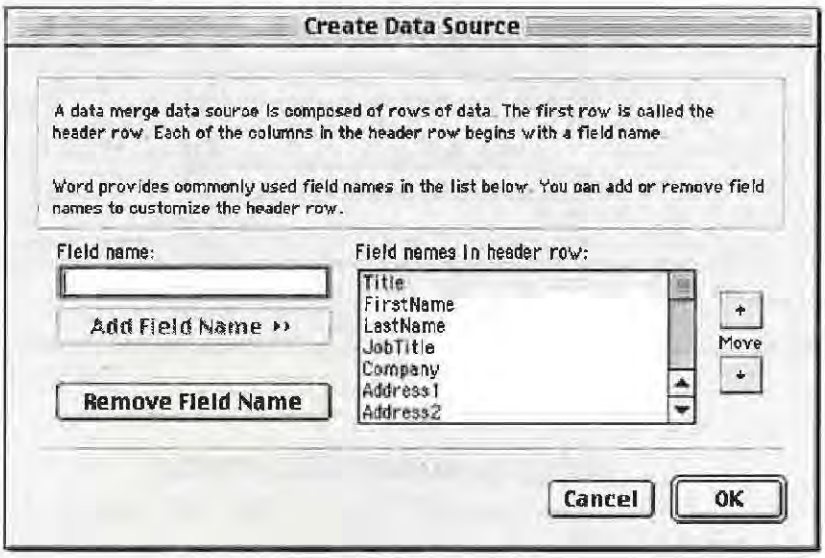


Figure 6-26: *Scroll through the "Field names in header row" box and click "Remove Field Name" for any you don't plan to use. To add fields you will need for your hockey letter (ShoeSize, for instance), type them in the "Field name" box and click Add Field Name. Note that Word permits no spaces in the names of your fields.*

4. **Click OK. Name the database (*Hockey Kids*, for instance) and click Save.**

   You've just created a Word document with a table that will hold all your data.

Now you're confronted with a Data Form window like the one shown in Figure 6-27. It's time to play fill-in-the-blanks; you'll use this dialog box to type in the information for each kid in your class.

5. **Enter the first kid's name, address, and other bits of information, pressing Tab or Return to jump from blank to blank. Click Add New to save the first record and clear the form for the next set of data.**

   Click Delete to "backspace" over the record you just entered; click Restore to bring it back. The counter at the bottom shows you where you are; use the navigation buttons to move backward and forward through the records.

6. **When you're finished typing in the data, click OK.**

   A list of your fields you've created appears on the Data Merge Manager (Figure 6-25).

   To add more records to your data source at a later time, you have two alternatives. You can choose File→Open, open your Hockey Kids document, and add rows to the Word table you'll find there (see page 155 for full detail on working with tables). You can also choose Get Data→Open Data Source on the Data Merge Manager palette, and click the Edit Data Source button to pull up the Data Form shown in Figure 6-27.

You're ready to perform the merge; skip ahead to page 245.

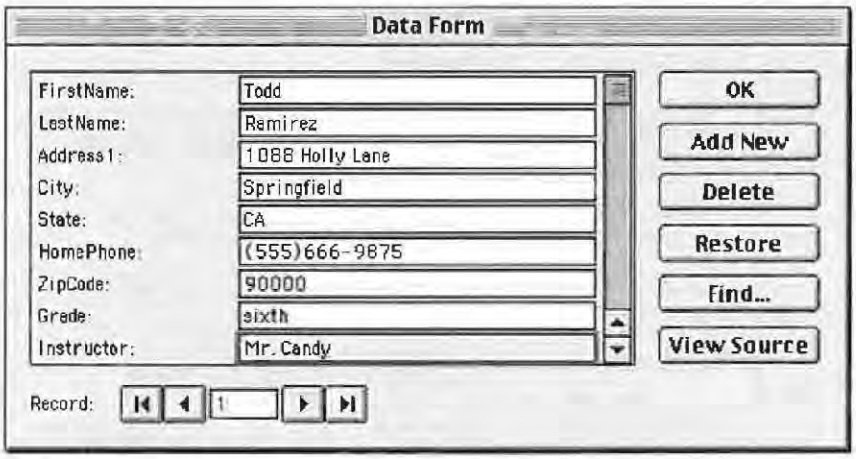


Figure 6-27:
The Find button lets you search the records you've entered. Of course, you can always click View Source and see all your data in table form. The data source is a Word document that you can see anytime by choosing File→Open.

Using an existing data source

If you want to merge an existing database into a form letter or envelopes, say in FileMaker Pro or Excel for Windows, first save the file. Then follow the steps below:

1. **Open your form letter (or create a new blank document).**

   If the Data Merge Manager palette isn't already open, choose Tools→Data Merge Manager.

2. **On the Data Merge Manager palette, choose Create→Form Letters (or Labels, or whatever you want to create).**

   If you've already produced a main document with fields, then add to your existing database a first record (a *header row)* whose names match the fields in your main document. That is, the first row of fields in your database should say *Name, Address, Home Phone,* and so on, instead of *Smith, 208 Ocean Lane, (212) 848-3445.*

3. **On the Data Merge Manager, choose Get Data→Open Data Source.**

   If the existing database is in FileMaker Pro, Excel, or your Office Address Book in Entourage, choose the appropriate command from this pop-up button instead. (You have to have a copy of FileMaker on your Mac for this to work.)

4. **Navigate to the file on your Mac and click Open.**

You're ready to proceed. If you haven't written your form letter yet, go to the next section. When both your form letter and data source are ready, go to page 245.

Creating the Main Document

When you're ready to write the actual form letter, you, like thousands of Publishers' Clearinghouse Sweepstakes form-letter writers before you, have a choice. You can either use an existing Word file as the body of the letter, or start from scratch.

To showcase the power of fields in a data merge document, here are the steps used to create the letter shown in Figure 6-28. In the Data Merge Manager, make sure the flippy triangle next to Merge Field is pointing downward, so that you can see the fields available in your data source. (If you haven't selected or created a data source,

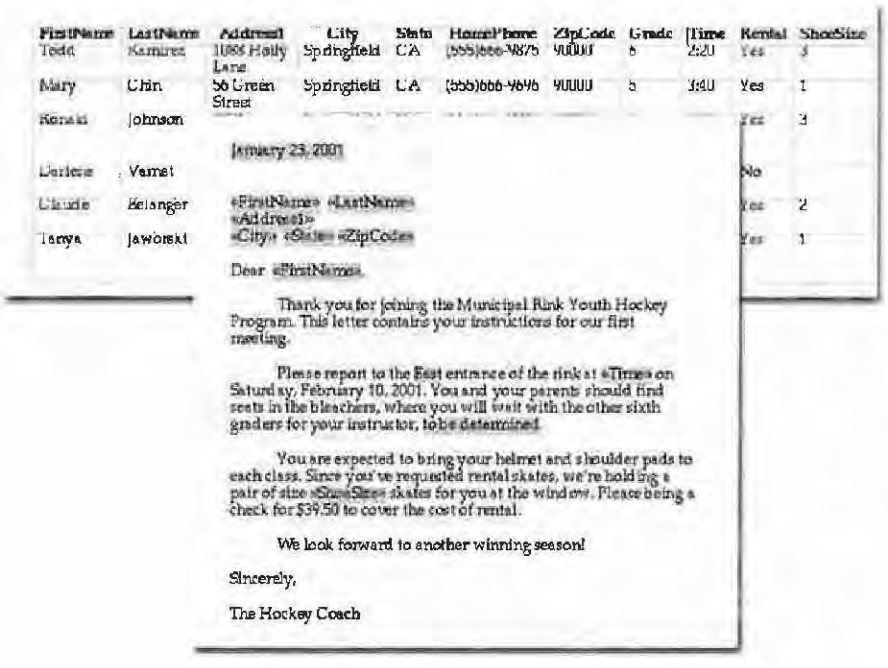


Figure 6-28: *This form letter and data source were created in Word. If you want to abandon the main document and start again, choose Create→ Restore to Normal Word Document on the Data Merge Manager. To add a field to a data source, select a column and click the Insert Columns icon on the Standard Toolbar.*

see "Creating a new data source" on page 240 or "Using an existing data source" on page 242.)

1. **Open a new Word document. Type the date, if you like, and then press Return two or three times.**

   You're about to insert the first addressee's mailing address, as is customary in a standard business letter. But you don't want to have to *type* that information—oh, no; that's *so* 1985. You want Word to fill it in for you, not just on this letter, but on every one of the 44 letters you're about to write and print.

2. **Drag-and-drop merge fields from the Data Merge Manager palette to place the mailing address into the letter, as shown in Figure 6-29.**

3. **Type *Dear* and a space, and then drag-and-drop the FirstName field.**

   Word represents the field (which, when you print, will be replaced by somebody's *actual* first name) using brackets. You should now see, in other words, *Dear <<FirstName>>*.

4. **Continue writing the letter, dragging and dropping merge fields as appropriate (see Figure 6-29).**

5. **Insert a Fill-in field to collect instructor's names for the letter.**

   Our hapless hockey coach *still* doesn't know who the instructor will be. In fact, she won't know until it's almost time for the letters to go out. She will fill in the instructor's name during the merge itself.

   This is where the *Fill-in field* comes in. On the Word Field section of the Data Merge Manager palette, drag "Fill-in" to the point in the letter where the instructor's name should go. A dialog box appears; type *What's the instructor*

POWER USERS' CLINIC

Delimiting Numerous Fields

A Word table used for a data source can contain a maximum of 63 columns or fields. If you need more than that—if you're creating a catalog, for instance—you must turn the document into a *tab-delimited text file* before using it as a data source.

A tab-delimited text file is a plain text document in which the information for each record (each person's mailing information, for example) appears on its own line, with a tab between each field (between Name and Address, for example).

You can create a tab-delimited text file in any database program, although the commands to do so vary slightly. In Excel, for instance, choose File→Save As; choose Text (tab delimited) from the Format pop-up menu. In AppleWorks, choose File→Save As and choose ASCII text from the File Type pop-up menu. And if you've built your data source as a Word table, turn the whole table into tab-delimited plain text using the instructions on page 164.

Before you use your tab-delimited file as a data source, inspect it in Word (choose File→Open to open it). Make sure that its very first row identifies the *names* of the columns (Name, Address, Phone, and so on).

name? or something else that will help you (or whoever's filling in the forms) remember what was supposed to go here.

This dialog box also gives you a chance to specify a fallback entry, some default text that will appear in the letter in case you don't get the instructor list on time: "name to be determined," or words to that effect. If you turn on the "Ask once" box, Word will ask you once for the missing information, then merge it into *all* the letters.

Tip: You may be tempted to use the Fill-in field with abandon so Word will ask you, in the process of printing out the form letters, to fill in the information for each record. But you can't see the records *during* the merge, so you won't have any way of knowing which information to fill in for each person's letter.

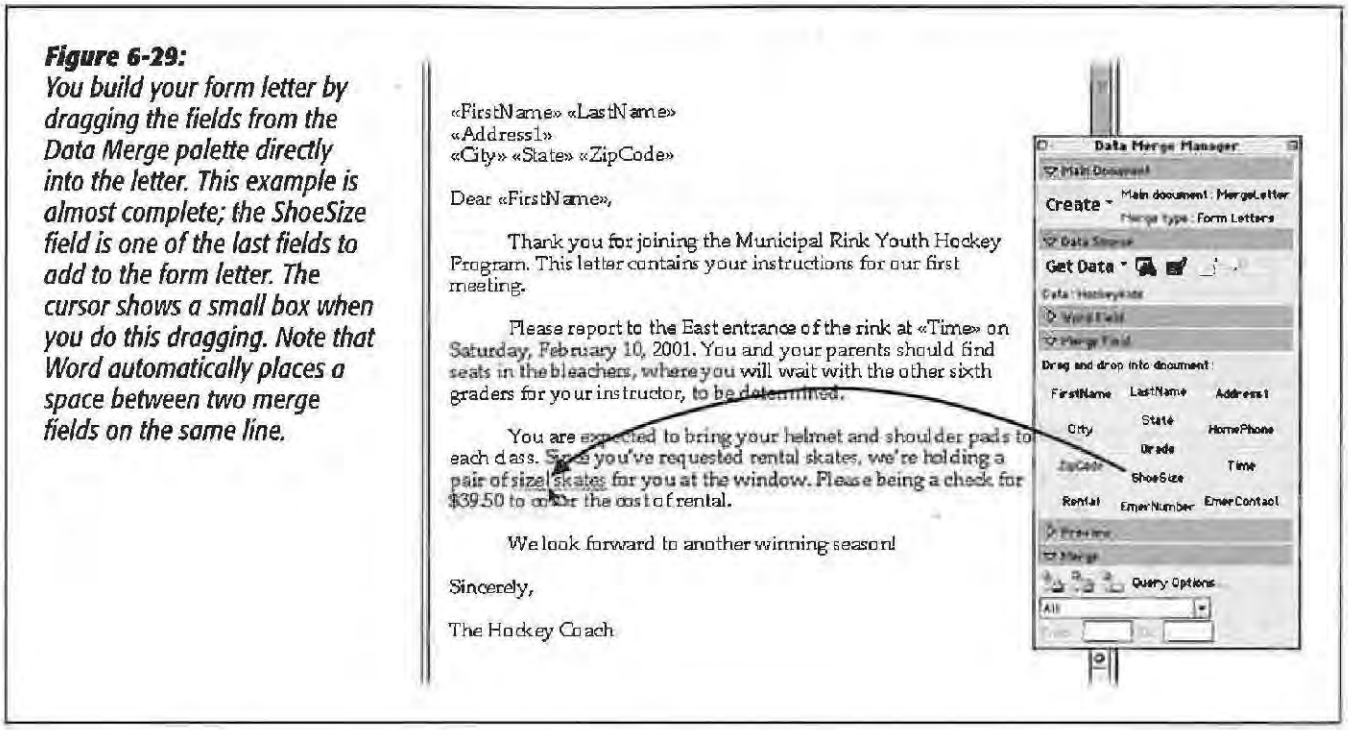


Figure 6-29: *You build your form letter by dragging the fields from the Data Merge palette directly into the letter. This example is almost complete; the ShoeSize field is one of the last fields to add to the form letter. The cursor shows a small box when you do this dragging. Note that Word automatically places a space between two merge fields on the same line.*

6. **Finish typing the letter and save the document as usual.**

   Word has inserted field codes for all the merge fields you've just dragged-and-dropped. To see them, choose Preview→View Field Codes ({a}) on the Data Merge Manager.

Previewing, Formatting, Preparing to Merge

After you've prepared a main document and inserted merge fields, you can see how the document will look with the actual data.

On the Preview section of the Data Merge Manager palette, click the View Merged Data button (identified as step 4 in Figure 6-25). Word shows you the first finished form letter, complete with *Dear Garfinkle* (or whatever the FirstName is in the first

record from your data source). Click the arrows in the box on the Preview panel of the Data Merge Manager to browse the other merged records.

In Preview mode, you can make formatting changes to the main document as well as to the merge fields. Just select text or fields in the usual way and use the Formatting Palette to add bold, italic, or other formatting. (When you reformat a field, the change applies to that *entire* field, in *all* documents in the merge.)

Once you've filled and prepared a data source, designed a main document, and outfitted it with merge fields, you're ready to merge. Check the Main Document and Data Source panels of your Data Merge Manager to make sure that the file names of your main and database documents appear correctly. Use the Preview feature as described above. Especially if you have lots of records in your database, proofread your main document carefully—you don't want a tiny mistake copied many times over!

When everything looks good, Word stands ready to merge your data and your form letter in any of three ways: sending it directly to the printer, merging into a new Word document, or merging into outgoing email messages.

Merging Straight to the Printer

If you've previewed your merge and are ready to go, simply click the Print button (on the Standard Toolbar) or Merge to Printer (an icon on the Data Merge Manager, shown in Figure 6-25). Specify the number of copies you need in the print dialog box and hit Return. Word prints the merged documents on your labels or paper.

Customizing merge printing

By default, the pop-up menu just below the Merge to Printer icon reads All, meaning that Word prints a merged document for *all* records in your chosen data source. The other choices are Current Record (to print just the record you're currently previewing in the document window) and Custom.

When you click Custom, you can use the From and To boxes below it to specify a range of records to merge. For example, if you have sticky laser labels that come 30 on a sheet, and you just want to print the first page of labels, enter *1* and *30*; Word will print only the first 30 records (that is, one page of labels). For the second page, enter *31* and *60*, and so on.

Query Options

If you want to print only some of your records, but they're not consecutive, you can use the Data Merge Manager's Query Options. This feature lets you *filter* your records before merging (choose only the records that meet certain criteria) or sort them.

With your main and data source documents chosen in the Data Merge Manager, click Query Options. The dialog box shown in Figure 6-30 appears. Let's say you want to send a special letter to clients in Denver, letting them know that you're going to be visiting their city next month. Your data source contains *all* your clients, and you obviously have no need to send the same letter to clients in San Francisco.

Since you're filtering by city, choose the City field on the Query Options→Filter tab and type *Denver* in the "Compare to" box. As you can see in Figure 6-30, there are lots of filtering options; you can apply more than one.

For instance, you can filter out only the people who have a work phone number *and* who live in your state. You can filter out people who were born after a certain date *and* who are women. Click OK when you're done; now you can print the merged documents as described above.

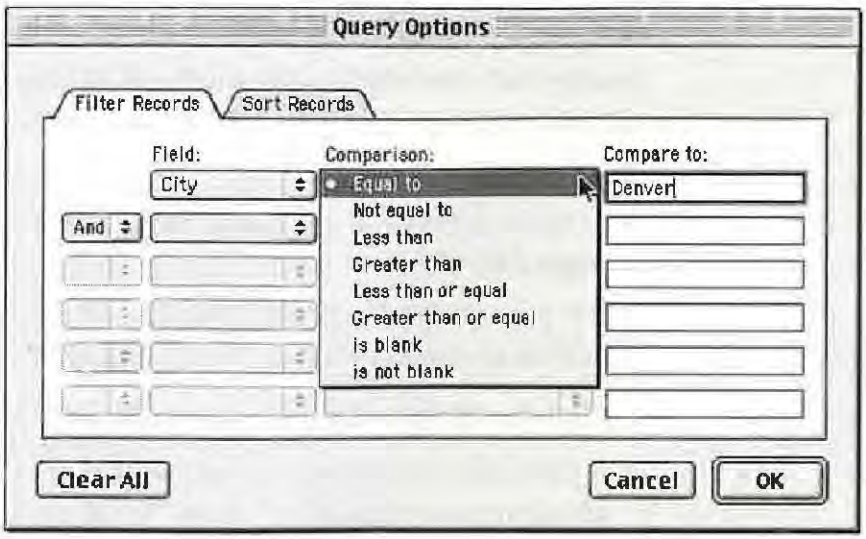


Figure 6-30:
Clicking the Sort Records tab lets you sort your data records as any Word table. (See page 155 for more detail on tables.) You can com-bine filtering and sorting. For instance, once you filter for just the people in Denver, you can print their addresses in Zip code order.

Merging to a New Document

Instead of sending your form letters (or mailing labels) to a printer, it's often more useful to have Word generate a new Word document, looking exactly as though a tireless secretary had painstakingly typed up a copy of each form letter with the correct addresses inserted. This is the only way to go if, for example, you want to

WORKAROUND WORKSHOP

When a Query isn't a Query

The querying features described on page 246 only work for Word tables, Excel spreadsheets, and Word tables created with the Data Merge–but not, oddly enough, when your data source is the Office Address Book.

When you choose the Office Address Book as your data source (see Chapter 10), Word uses *every* name and address in it. You can't sort the address book or use only *some* of the names there. If you'd like to sort or filter your little black book before merging, in other words, you'll have to export your Entourage contacts as a tab-delimited text file (see page 367). Then open the resulting file in Excel (choose Data→Get External Data→From Text File). Once it's in Excel, you can sort the addresses, find only those in New York, or whatever. Finally, save the worksheet in Excel, and use *it* as a data source as described on page 243.

You can't use the querying feature for FileMaker and tab-delimited text files, either. To sort or filter these files, you can import them into Excel as described above.

slightly tweak the body of each outgoing letter independently. You can always print the thing *after* looking it over and editing it.

Creating a new mass form-letter document is easy; after setting up your main document and data source, click the Merge to New Document icon on the Data Merge Manager palette. Word churns for a moment and then produces the document (with a page break automatically inserted after each copy of the letter).

Save the merge document to your hard drive; edit, print, or duplicate just as you would any Word document.

Merging to Email

You *know* it's the Internet age when your word processor comes with a feature that lets you send out form letters by email. Here's how this new Office 2001 feature works:

1. **Create a form letter main document and a source document, as described on pages 240–244.**

   For best results, don't use complex formatting, because some email users can only view email as plain text (see Chapter 8).

2. **Click the Merge to E-Mail icon on the Data Merge Manager palette.**

   If the button is dimmed, it could be that Entourage isn't selected as your default email program. Quit Word, choose ➔→Control Panels→Internet, click the Email tab, and choose Microsoft Entourage from the pop-up menu at the bottom of the window. Start again from step 1.

   If all is well, however, the Mail Recipient dialog box opens (see Figure 6-31).

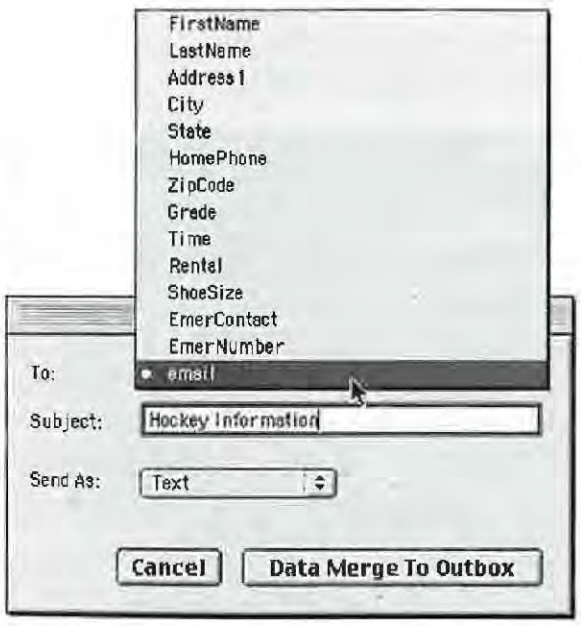


Figure 6-31:
If you choose to attach the letter as a file attachment, the name of your attachment will be the same as the file name of your main document. You may want to rename it for the benefit of your recipients, especially if you have a tendency to name documents things like LettertoStupid.

3. **Using the To pop-up menu, choose the field that contains the email addresses. Complete the email message as you would any other.**

   For example, type a Subject line in the box.

4. **Using the bottom pop-up menu, specify whether to send the letter as text (in the body of the email), or as an attachment. Click Data Merge to Outbox.**

   The data merge proceeds as usual; Word asks you to type Fill-in fields, and so on. Entourage opens automatically, and you can watch the boldface digits next to its Outbox skyrocket as Word crams newly generated messages into it. There they wait until you click Send (or until a scheduled Send runs). There's no preview, but you can open any of the merged emails in the Outbox and look at them.

Labels and Envelopes

Two of the most common Word data merges are automated for you: address labels and envelopes. Either way, this is an extremely powerful feature that lets you combine the database flexibility of your Entourage Address Book with the formatting smarts of Word. Whether you're the local Scout-troop master or an avid Christmas-card meister, letting Word prepare your mass mailings beats addressing envelopes by hand any day.

To prepare for one of these data merges, do the following:

- Prepare a data source, as described on page 240.
- Know what size labels or envelopes you're going to use. Have some on hand as you begin the process. (You can buy sheets of self-adhesive labels at Staples or any other office-supply store; Avery is one of the best-known names. These labels come in every conceivable size and shape; the 30-per-page version is the most popular.)
- Set aside some time for trial and error.

Merging onto labels

Make sure that the labels you buy will fit into your printer and feed smoothly—buy inkjet or laser labels, for example, to match the kind of printer you have.

To create labels, open a new blank Word document and proceed as follows:

1. **Choose Tools→Data Merge Manager.**

   The Data Merge Manager palette appears.

2. **On the Data Merge Manager, choose Create→Labels.**

   The Label Options dialog box appears (see Figure 6-32, top). Unless you're that rare eccentric who uses a dot-matrix (impact) printer, leave "laser and inkjet" selected.

3. **From the "Label products" pop-up menu, select the brand of labels you have.**

   Word lists every kind of label you've ever heard of, and many that you haven't.

Tip: If you've bought some oddball, no-name label brand not listed in Word's list, click New Label. Word gives you a dialog box, complete with a preview window, for specifying your own label dimensions.

4. **Inspect your label package to find out what label model number you have; select the matching product in the "Product number" list box. Click OK.**

   The main document becomes an empty sheet of labels. It's time to start dragging field names from your source document.

5. **On the Data Merge Manager, use the Get Data pop-up button to select the database or file that contains your addresses.**

   For example, to use your Entourage Address Book, choose Office Address Book from this menu. If your addresses are stored in an Excel spreadsheet or a tab-delimited text file, choose Open Data Source instead (then navigate to your database or data source file and open it).

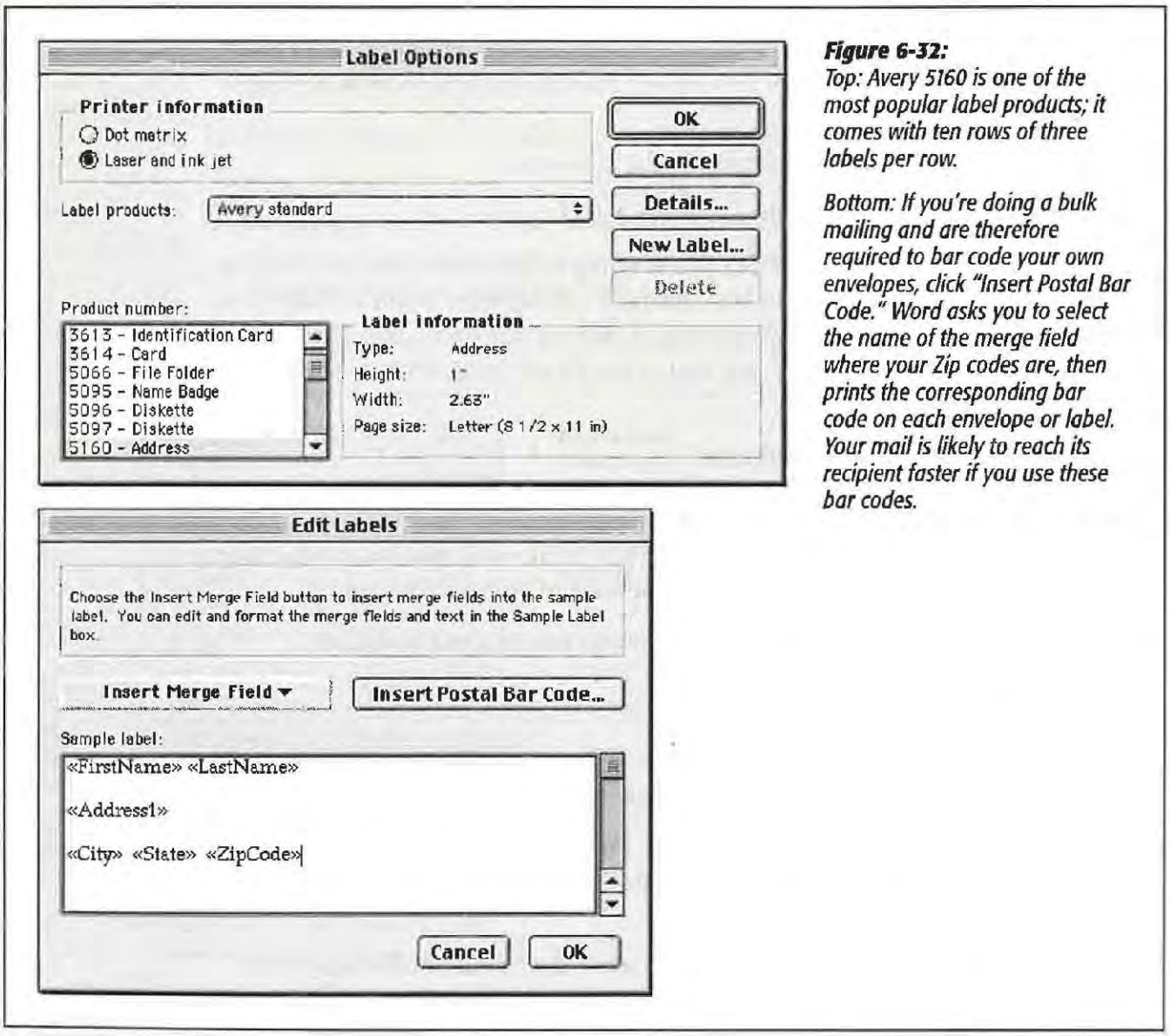


Figure 6-32:
Top: Avery 5160 is one of the most popular label products; it comes with ten rows of three labels per row.

Bottom: If you're doing a bulk mailing and are therefore required to bar code your own envelopes, click "Insert Postal Bar Code." Word asks you to select the name of the merge field where your Zip codes are, then prints the corresponding bar code on each envelope or label. Your mail is likely to reach its recipient faster if you use these bar codes.

If you haven't set up your database yet, choose New Data Source and follow the steps on page 240.

6. **In the Edit Labels dialog box that appears, choose field names from the "Insert Merge Field" pop-up menu to build your address.**

   As shown at bottom in Figure 6-32, use the Space bar and Return key as you go. For example, choose First_Name, then insert a space, then choose Last_Name, then press Return to start a new line. Choose City, type a comma if you like, and then choose State; add two spaces before choosing Zip code.

7. **Click OK.**

   You return to your main document window, where placeholders for your labels now appear. (Click the <<abc>> icon on the Data Merge Manager's Preview panel to preview the actual names and addresses as they'll be printed.)

   Now you can format the text using (for example) the Formatting Palette; you can change the font or size, add bold, italic, or color, and so on. Just select the text or the field placeholders to format them.

8. **Click Merge→Merge to Printer (see page 246) and print out one page of labels on a blank piece of paper.**

   This way, you can check to see if the labels are properly aligned without wasting an expensive sheet of labels. Hold the paper printout over a label sheet and line them up in front of a window or light.

9. **If you find you need to do some realigning, choose Create→Labels on the Data Merge Manager and click Details.**

   A dialog box pops up, showing the dimensions and specifications of your currently chosen label model, along with boxes and arrows for adjusting them. You can move the label text up, down, and side-to-side in order to better fit on the labels.

10. **When everything's working properly, load the labels into your printer, and click Merge→Merge to Printer. Click Print.**

    Take advantage of the Merge→Custom box (see page 246) if you have a long mailing list. Some printers tend to jam if you try to print too many pages of labels at once.

Editing labels

You can edit a label document by opening it, just like any main document, but Word gives you a couple of special tools for the unique problems involved in changing a sheet of labels. To make changes to an existing label document:

1. **Open the label document.**

   Word opens the document and the Data Merge Manager. (If not, choose Tools→Data Merge Manager.)

2. **Click the Edit Labels for Data Merge button.**

   It's the third icon in the Data Source section of the Data Merge Manager palette. The Edit Labels dialog box opens, as shown in Figure 6-32.

3. **Make changes to the label format.**

   Add or remove merge fields, for instance, or change text formatting, by selecting the text or merge fields and using the Formatting Palette.

4. **Click OK and proceed with the merge.**

Propagating labels

You can also edit labels right in the main document, which you may find easier than using the Edit Labels dialog box. The secret is in the Propagate Labels button on the Data Merge Manager (the rightmost icon in the Data Source section of the Data Merge Manager palette). To use this method of label editing:

1. **Open the label document; click the *first* label on the page.**

   Word opens the document and the Data Merge Manager.

2. **Edit the label document.**

   For instance, you can drag merge fields from the Data Merge Manager, type additional text, and format the text or field placeholders (font, color, and so on). Remember, you're doing this only in the first label.

3. **Click the Propagate Label Document button on the Data Merge Manager.**

   Word changes all labels on the sheet so that they match the changes you just made in the first label.

When you're done propagating, merge and print the labels as described earlier.

Merging onto envelopes

Printing envelopes on computer printers has always been an iffy proposition; in essence, you're trying to ram two or three layers of paper through a machine designed to print only one paper thickness.

You'll have an easier time if your printer is envelope-friendly. If your printer has guides for feeding envelopes, so much the better. You may find that some brands of envelope fit your printer better than others.

When you're ready to begin, open a new blank document and follow these steps:

1. **Choose Tools→Data Merge Manager, then choose Create→Envelopes.**

   The Envelope dialog box opens, as shown in Figure 6-33. If you don't care for Helvetica, click Font to call up a Font dialog box. You can use any of Word's fonts and effects.

2. **Click Position. In the Address Position window, click the arrows to move the return and delivery addresses around on the envelope, if necessary.**

   For example, if the return address is too close to the envelope edges, or the delivery address is too low, now's your chance to fix it. Click OK when you're finished.

3. **Click Page Setup.**

   Word opens your printer's usual Page Setup dialog box. Choose the envelope size from the pop-up menu and click OK. (If you don't see the correct size, click Cancel; under Printing Options, click the "Use custom settings" button, then click Custom. In the Custom Page Options dialog box, choose an envelope size and tell Word how you plan to feed it into the printer.)



Figure 6-33: *If your return address does not automatically appear in the Return Address window, type in the address you want to use in the "Return address" box. Check the "Use my address" box to pull up the name and address you entered when you set up Office 2001. Checking Omit will print the envelopes with no return address at all.*

4. **Click OK, then OK again to dismiss the Envelope dialog box.**

   Your chosen envelope format appears in the main document; it's time to "type in" in addresses you want to print.

5. **If you want to print just one address from your Entourage Address Book, click the Address Book icon at the upper right of the Delivery Address window, and proceed as shown in Figure 6-34.**

   If you want to do an actual mass printing of envelopes, however, do this:

6. **On the Data Merge Manager, choose Data Source→Get Data→Open Data Source; select and open your database.**

   Again, Excel spreadsheets, FileMaker databases, and tab-delimited text files are fair game. If you haven't set up your database yet, choose New Data Source and follow the steps on page 240.

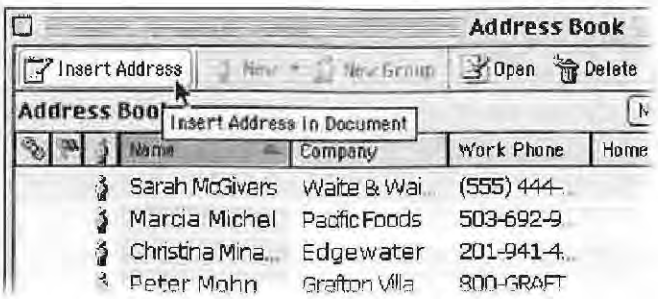


Figure 6-34:
Choose the name and address you'd like to send to in your Entourage address book, then click Insert Address, as shown. Close the Address Book to return to the Envelope dialog box, where you can format the envelope.

7. **Drag field names from the Merge Field panel of the Data Merge Manager into the address box of the envelope in the main document.**

   Add spaces and line breaks in the usual way, as shown in Figure 6-32.

8. **Prepare your printer's feed for envelopes; click Merge→Merge to Printer. Click Print.**

   If the envelope gods are smiling, your printer now begins to print the envelopes perfectly. (If they're not, then you may discover that you'll have to rotate the envelopes in the paper slot, for example.) Depending on your printer model, you may have to print one envelope at a time—choose Current Record from the drop-down menu at the bottom of the Data Merge Manager.

Working with Macros

A *macro* is like a script: a step-by-step series of commands that Word performs, rapid-fire, each time the macro is run. Although they definitely qualify as a power-user feature, you should consider this feature any time you find yourself facing some repetitive, tedious editing task. For example:

- Changing three different character names in one pass (which you have to do for each chapter of the novel you just finished).
- Drawing a table with the months of the year automatically listed down the first column and the names of all salespeople across the top. (All you have to do to complete the daily sales report is fill in the figures.)
- Saving the table document above as a Word document in your Sales folder and saving an additional copy as a Web page (which you can now upload to the company intranet).