

# 5

# FORMATTING DOCUMENTS

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Writing text is only part of what you'll do with Word. (If your main interest is in generating a lot of text with as few interruptions as possible, you can probably do it faster using a simple text editor, such as Notepad.) In order to create documents that are attractive and pleasant to read, you must add *formatting*.

Word supports three kinds of formatting:

- ◆ *Document formatting* affects the entire document and is primarily related to page settings, such as paper size, margins, orientation, sections, and columns. Other document formatting commands enable you to insert page, section, and column breaks; insert blank and cover pages; and add headers and footers.
- ◆ *Paragraph formatting* applies to entire paragraphs and is used to set alignment, indents, and line spacing. You can also create numbered or bulleted lists.
- ◆ *Character formatting* can be applied to selected words, sentences, or paragraphs and includes attributes such as font, size, color, and style.

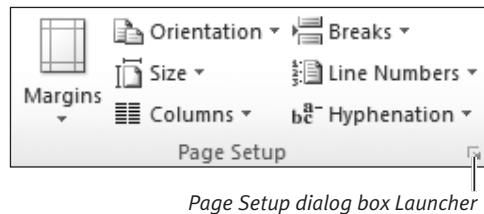
To simplify the process of consistently applying paragraph and character formatting to material in a document, you can define *styles*.

## Specifying Page Settings

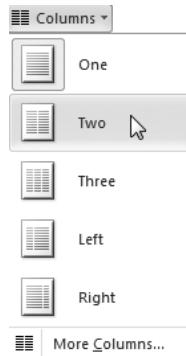
To set basic document formatting, you choose options from the icon menus in the Page Setup group on the Page Layout tab (**Figure 5.1**). These settings normally affect the entire document.

### To set paper size and orientation:

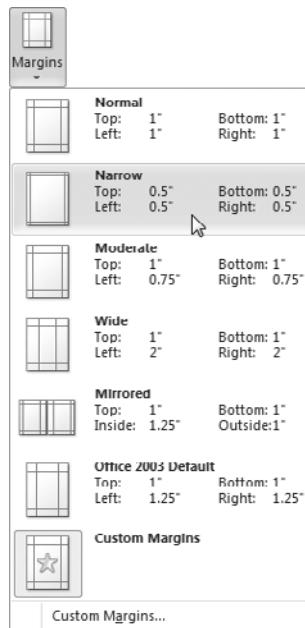
- ◆ **Paper size.** Click the Size icon and choose a standard paper size from the drop-down menu. If you want to use a special paper size, choose More Paper Sizes. On the Paper tab of the Page Setup dialog box, select Custom size from the Paper size drop-down list, specify the paper's width and height, and click OK.
- ◆ **Orientation.** Pages can be laid out and printed in normal fashion (*portrait*) or sideways (*landscape*). Choose Portrait or Landscape from the Orientation menu.
- ◆ **Columns.** Certain types of documents look better and are easier to read when arranged in multiple columns. To format a new document or reformat an existing one in this manner, choose the number of columns or a two-column layout (Left or Right) from the Columns drop-down menu (**Figure 5.2**).
- ◆ **Margins.** Set margins for the document by choosing an option from the Margins drop-down menu (**Figure 5.3**). To set margins that differ from the ones listed, choose Custom Margins and enter the desired settings on the Margins tab of the Page Setup dialog box.



**Figure 5.1** Specify page settings by choosing options from the Page Setup group on the Page Layout tab.



**Figure 5.2** Choose a number or type of column.



**Figure 5.3** Choose margins from the Margins drop-down menu.



**Figure 5.4** On the ruler, drag a column's right margin to change its width.



**Figure 5.5** You can also specify page settings on the tabs of the Page Setup dialog box.

## ✓ Tips

- To change a column's width, drag the right margin of the column in the horizontal ruler (**Figure 5.4**).

If the ruler isn't visible, switch to the View tab and click the Ruler check box in the Show group. Or you can click the View Ruler icon (found beneath the right side of the Ribbon).

- To restore a multi-column document to a single column, choose One from the Columns menu (see Figure 5.2).
- Although it's uncommon, you can change page settings in mid-document (switching from portrait to landscape mode or setting new margins, for instance). Click the Page Setup dialog box launcher (see Figure 5.1). On the appropriate tab of the Page Setup dialog box (**Figure 5.5**), set new options, choose This point forward from the Apply to drop-down menu, and click OK.
- You can also use the Page Setup dialog box to apply new settings to the *entire* document. Choose Whole document from the Apply to drop-down menu.
- Although you may be tempted, it's usually inappropriate to set left or right margins of zero (0). First, many printers can't print from edge to edge. For instance, laser printers often have a *no-print zone* of 0.2–0.25" on each margin. Second, documents with tiny margins are often difficult to read because the lines are so long.
- You can specify page settings at any time: before you begin writing, after you've finished, or at any point in between.

## Modifying the Background

You can choose options from the Page Background group (**Figure 5.6**) on the Page Layout tab to add color, a watermark/rubber stamp, or a border to every document page.

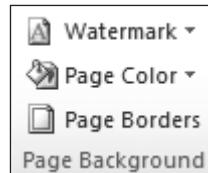
In general, you should apply background settings sparingly and only to special documents. Color and borders, for example, are best reserved for party invitations, ads, and flyers. On the other hand, a watermark can be extremely useful when applied to certain business documents, marking them as drafts or confidential, for example.

### To add a background color to each page:

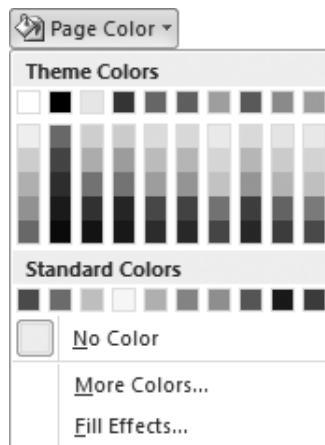
- ◆ Click the Page Color icon, and *do one of the following:*
  - ▲ Select a color from the Theme Colors or Standard Colors palette (**Figure 5.7**).
  - ▲ To choose among all possible colors, choose More Colors. Select a color in the Colors dialog box and click OK.
  - ▲ To apply a color gradient, texture, pattern, or picture to the background, choose Fill Effects. Select options from the tabs of the Fill Effects dialog box (**Figure 5.8**) and click OK.
  - ▲ To remove a previously applied color, choose No Color.

### ✓ Tip

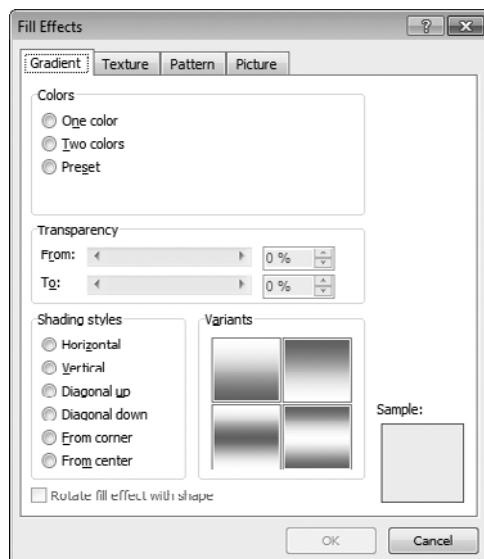
- Document text may be easier to read on certain color, gradient, texture, pattern, and picture backgrounds than on others. For instance, if you choose a dark color, you may need to change the text color to one that contrasts better with the new background.



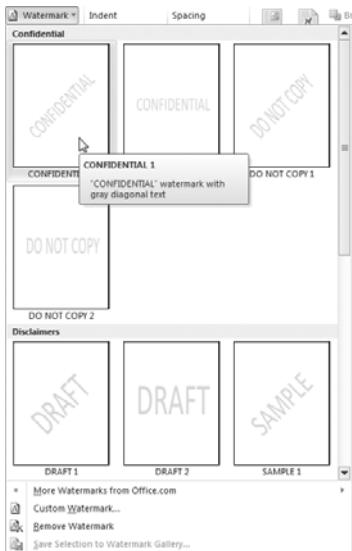
**Figure 5.6** Change the page background by choosing options from this group.



**Figure 5.7** The selected color will be applied to every document page.



**Figure 5.8** The Fill Effects dialog box.



**Figure 5.9** Common text watermarks can be chosen from the gallery.



**Figure 5.10** To create a custom watermark or customize one of the gallery choices, set options in the Printed Watermark dialog box.

## To apply a preset watermark:

- ◆ Click the Watermark icon and choose one of the preset watermarks from the gallery (Figure 5.9).

The watermark is applied to all pages.

## To apply a custom watermark:

1. Click the Watermark icon and choose Custom Watermark from the gallery (Figure 5.9).

The Printed Watermark dialog box appears (Figure 5.10).

2. *Do one of the following:*

- ▲ To use a text string as the watermark, select Text watermark; choose or type a text string; and choose settings for the language, font, size, color, and layout. For a fainter watermark, ensure that Semitransparent is checked.
- ▲ To use an image as the watermark, select Picture watermark. Click the Select Picture button to select an image file from your hard disk. You can choose a magnification for the image from the Scale drop-down menu or leave it set to Auto for the optimal size that will fit on the document page without cropping. Click the Washout check box for a fainter image.
- ▲ To remove an existing watermark from the document, select No watermark.
- 3. Click Apply to add the watermark to the document pages. If you don't like its appearance, you can change the settings and click Apply again.
- 4. When you're satisfied with the watermark, click OK to close the dialog box.

### ✓ Tips

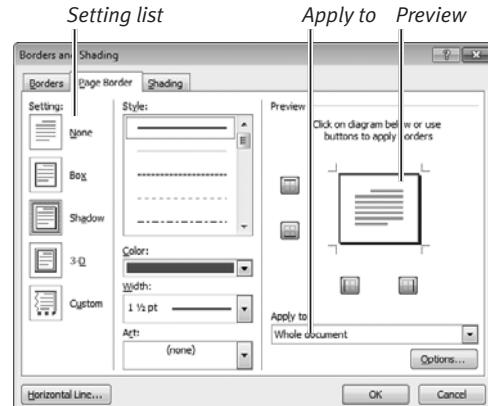
- You can also remove a watermark by choosing Remove Watermark from the Watermark gallery menu (see Figure 5.9).
- You can apply a text watermark or a picture watermark—not both. If you switch types, the current watermark is replaced.
- Check the watermark's appearance with and without Semitransparent or Washout.

### To add borders around each page:

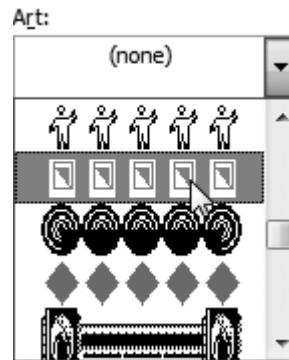
1. Click the Page Borders icon. The Borders and Shading dialog box appears (Figure 5.11). Select the Page Border tab.
2. Click an icon in the Setting list to specify the type of border you want to create.
3. Set line properties by choosing options from the Style, Color, Width, and Art drop-down menus. Your choices are reflected in the Preview area of the dialog box.
4. From the Apply to drop-down menu, indicate the document pages to which the border will be applied.
5. Click OK.

### ✓ Tips

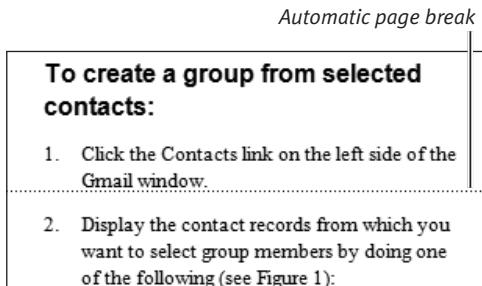
- To remove an existing page border or to begin designing one from scratch, select None in the Setting list.
- To remove individual lines from the border or to add a line, click that side of the box or the matching icon in the Preview area.
- Rather than create a line border, you can use artwork (such as pencils, scrollwork, or trees) as the border by choosing an image from the Art drop-down menu (Figure 5.12).



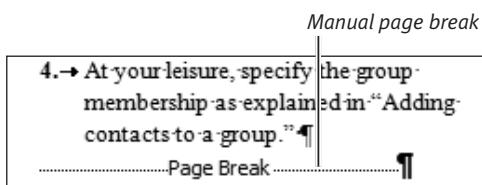
**Figure 5.11** Select border settings on the Page Border tab of the Borders and Shading dialog box.



**Figure 5.12** Use artwork to add a festive or eye-catching border to a flyer or party invitation.



**Figure 5.13** In Draft view, automatic page breaks are shown as dotted lines.



**Figure 5.14** When invisible characters are made visible, manual page breaks are clearly marked.

## Inserting Breaks

Word adds an *automatic page break* wherever it's needed, based on the margins and the style setting of the paragraph that will be broken or moved to the next page. As you add or delete text, the automatic breaks are adjusted as needed; that is, Word *repaginates* as you type. In Print Layout and Full Screen Reading views, breaks are shown as new physical pages. In Draft view, they're indicated by dotted lines (Figure 5.13).

Occasionally, breaks appear in spots where you'd prefer they not occur. For example, a key quote may be split between two pages. You can prevent this by inserting a *manual break* wherever it's needed. In addition to inserting manual page breaks, you can insert column and section breaks.

### To insert a manual page break:

1. Set the text insertion mark at the start of the line on which you want to start the new page.
2. *Do one of the following:*
  - ▲ On the Insert tab, click the Page Break icon in the Pages group.
  - ▲ On the Page Layout tab, click the Breaks icon in the Page Setup group and choose Page.
  - ▲ Press **Ctrl+Enter**.

A page break is created at the text insertion mark.

### ✓ Tips

- The safest time to insert page breaks is after you've finished writing and editing.
- To remove a manual page break, select it and press **Backspace**, **Delete**, or **Del**. It's easiest to do when the breaks are visible (Figure 5.14). To display normally invisible characters, click the Show/Hide ¶ icon in the Home tab's Paragraph group.

## Avoiding Widows and Orphans

In word processing, a single line at the end of a page is referred to as a *widow*; a single line at the beginning of a page (normally, the final line of a paragraph that began on the previous page) is called an *orphan*. Layout rules suggest that both look amateurish and should be avoided.

If you carefully define and use *paragraph styles* (see “Working with Styles” in this chapter), you can automatically avoid widows and orphans. For example, when specifying the style for a header, you can enable a combination of Widow/Orphan control, Keep with next, and Keep lines together. For body text paragraphs, Widow/Orphan control will suffice.

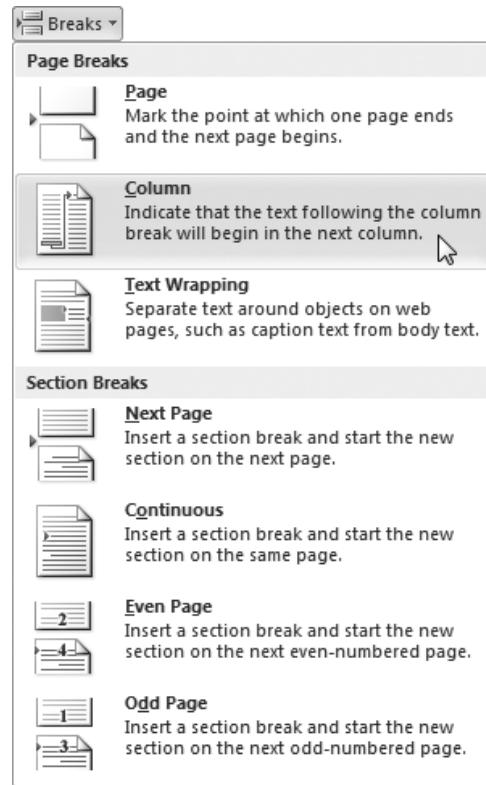
**To insert other types of manual breaks:**

1. Set the text insertion mark at the start of the line where you want to insert the break.
2. On the Page Layout tab, click the Breaks icon in the Page Setup group. From the drop-down menu (**Figure 5.15**), do one of the following:
  - ▲ Choose Column to break the current column in a multi-column layout. The text following the text insertion mark will begin in the next column.
  - ▲ Choose a command from the Section Breaks part of the menu to create or indicate the start of a new section.

The column or section break is inserted.

**✓ Tip**

- Unless you're writing a lengthy or complex report, you're unlikely to divide a document into sections. (I suspect that most Word users don't even know this feature exists.) Use sections when you want to use chapter-relative page numbering or dramatically change formatting in the middle of a document (switching between a single- and multi-column layout, for example).



**Figure 5.15** You can insert manual breaks for new pages, columns, or sections by choosing a command from the Breaks drop-down menu.



**Figure 5.16** Choose a cover page from the gallery.



**Figure 5.17** To complete the cover page, replace the placeholder text.

## Adding a Cover Page or Blank Page

You can add a preformatted *cover page* (or *title page*) to some documents. A cover page is especially useful for reports. The cover page is automatically placed at the beginning of the document and contains placeholders for important text elements such as the title, author, and date. Only one cover page is allowed per document. If you add another, it replaces the current one.

When writing a report or book that will be bound on the left edge, it's traditional to start each new section or chapter on a right-hand page. As such, if there's no material for the facing page (on the left), the page must be blank. You can insert blank pages anywhere you wish.

### To add a cover page:

1. On the Insert tab, click the Cover Page icon in the Pages group and choose a cover page from the gallery (**Figure 5.16**).  
The cover page is added as the first page.
2. Replace the placeholder text with your own text (**Figure 5.17**).

### ✓ Tips

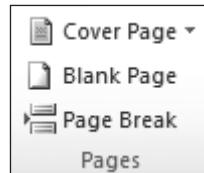
- To view additional cover pages, move the cursor over the More Cover Pages from Office.com submenu and wait for the page thumbnails to download.
- When you replace one cover page with another, filled placeholders remain filled.
- To remove a cover page, choose Remove Current Cover Page from the Cover Page drop-down menu.

**To insert a blank page:**

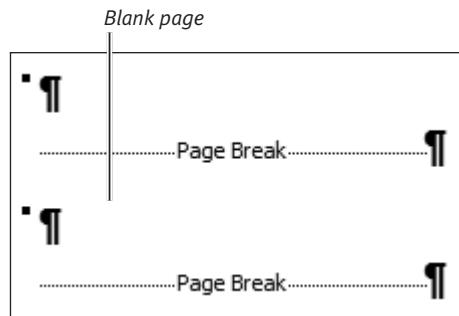
1. Set the text insertion mark where you want to add a blank page.
2. On the Insert tab, click the Blank Page icon in the Pages group (**Figure 5.18**).  
A blank page is added at the text insertion mark by inserting two page breaks (**Figure 5.19**). As necessary, text is reflowed around—but not into—the blank page.

**✓ Tips**

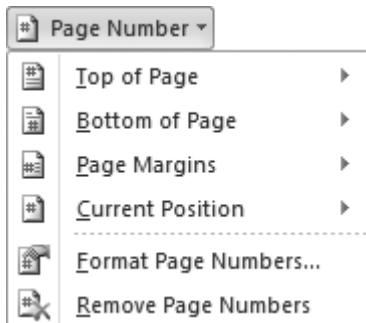
- You can leave an inserted blank page blank or type text on it.
- To remove a blank page, delete the two manual page breaks and the blank paragraphs that were inserted. It's easiest to select and delete these items if you've enabled Show/Hide ¶ in the Paragraph group on the Home tab.



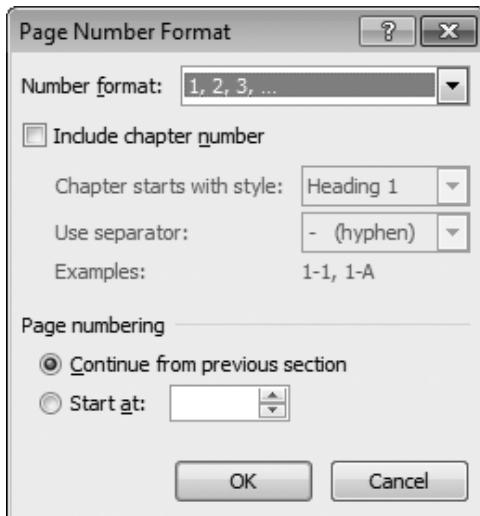
**Figure 5.18** Click Blank Page to add a blank page at the text insertion mark.



**Figure 5.19** To create a blank page, Word inserts a new paragraph surrounded by a pair of manual page breaks.



**Figure 5.20** To insert only a page number into a header, footer, or margin, choose an option from the Page Number drop-down menu.



**Figure 5.21** To start numbering with a number other than 1, select a different number format, or apply chapter-relative numbering, set options in the Page Number Format dialog box.



**Figure 5.22** Click this icon when you're ready to resume editing the document.

## Adding Headers or Footers

Headers and footers are reserved areas at the top and bottom of each page, respectively, in which you can display important text, such as a page number, date, filename, or text string (*Confidential*, for instance). Header and footer styles can be chosen from a gallery or created from scratch.

### To add a header or footer that contains only a page number:

1. On the Insert tab, click the Page Number icon in the Header and Footer group (**Figure 5.20**). Choose a number style from the appropriate position gallery: Top of Page (header), Bottom of Page (footer), or Page Margins (left or right margin).
2. *Optional:* To specify a numbering format (such as chapter-relative numbering) or a starting number, choose Format Page Numbers from the Page Number menu. Make any desired changes in the Page Number Format dialog box (**Figure 5.21**) and click OK.
3. To return to the body of the document, click Close Header and Footer in the Close group of the Design tab (**Figure 5.22**) or double-click anywhere in the body.

### ✓ Tips

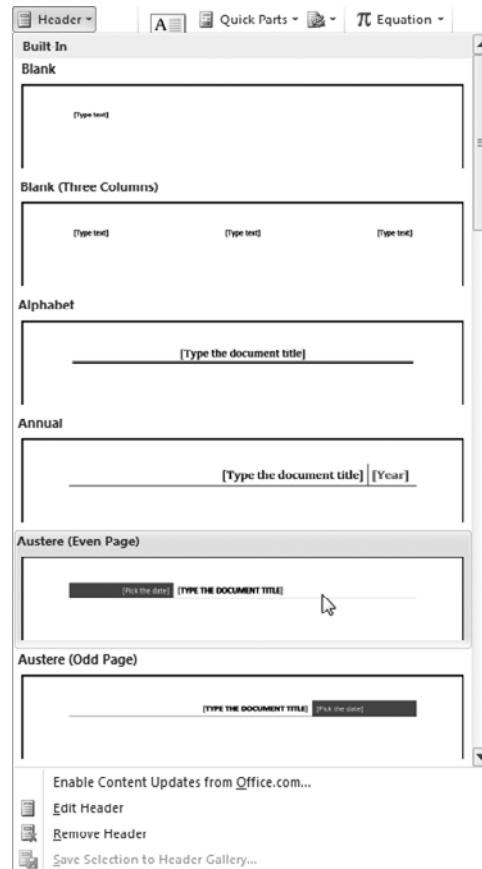
- To remove all inserted page numbers, click the Page Number icon and choose Remove Page Numbers (Figure 5.20).
- Although the intent of the Page Number command is to add page numbering as the *sole* element in a header, footer, or margin, you can add other elements by following the instructions in “To add a preformatted header or footer” and “To create a custom header or footer.”

## To add a preformatted header or footer:

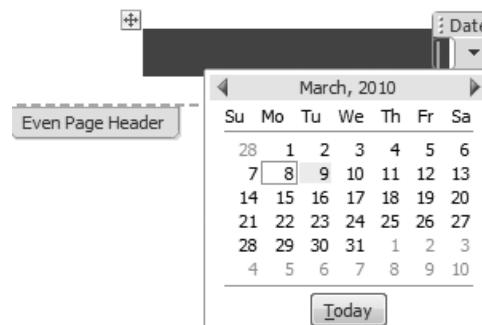
- On the Insert tab, click the Header or the Footer icon in the Header & Footer group. Choose a style from the drop-down gallery (Figure 5.23).

If you intend to show different header or footer text for odd and even pages, be sure to choose the correct one for the currently displayed page. If the same information will be shown on odd and even pages, it doesn't matter whether you choose an odd or an even page style. The chosen style will be displayed on *every* page.

- Make any necessary edits to the header or footer elements. For example, you can:
  - Delete unwanted elements.
  - Replace placeholder text by typing.
  - Select an option, such as a date, from a placeholder's drop-down menu (Figure 5.24).
  - Replace one element with another by deleting the original element, clicking the Quick Parts icon in the Insert group, and choosing Field. Common fields can also be chosen from the Quick Parts > Document Property submenu.
  - Insert and position a new element. Add a text alignment tab for the new element by choosing Insert Alignment Tab from the Position group on the Design tab.
- If you want the header or footer to be different on odd and even pages, click the Different Odd & Even Pages check box in the Options group of the Design tab. Then repeat Steps 1–2 for the opposite page—that is, odd or even.
- To return to the body of the document, click Close Header and Footer in the Close group of the Design tab or double-click anywhere in the body.



**Figure 5.23** One of the most expedient ways to create a header or footer is to pick a style from the gallery.



**Figure 5.24** Some header/footer fields have a menu from which you can choose a setting or option.

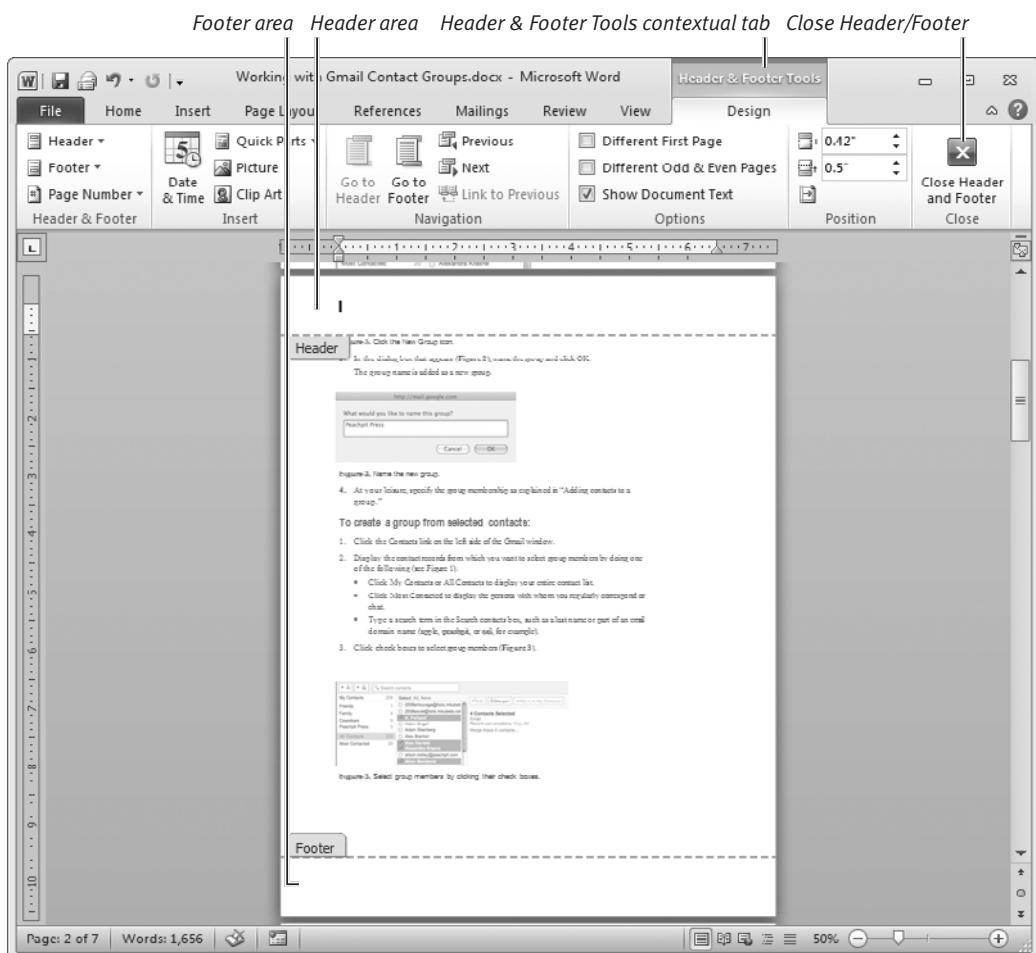
## To create a custom header or footer:

### 1. Do either of the following:

- ▲ In the Header & Footer group on the Insert tab, click the Header or Footer icon and choose Edit Header or Edit Footer from the drop-down menu.
- ▲ In Print Layout view, double-click in the header or footer area.

The text insertion mark appears in the header or footer (**Figure 5.25**).

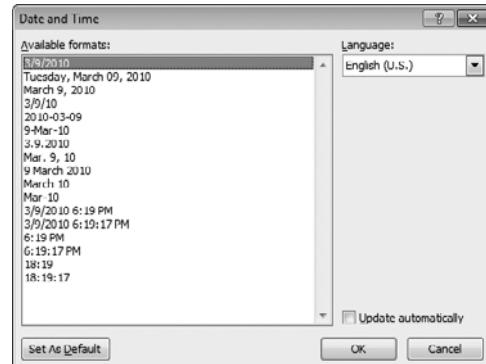
*continues on next page*



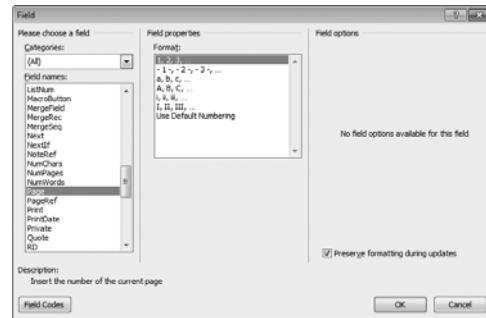
**Figure 5.25** Creating or editing a header or footer is done in Print Layout view.

## Chapter 5

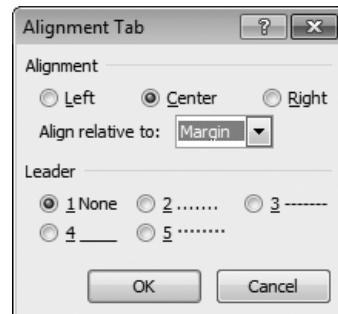
2. To insert header or footer elements, do *any of the following:*
    - ▲ Type a text string, such as the author's name, filename, or document title.
    - ▲ To insert the current date, time, or both, click the Date & Time icon in the Insert group of the Design tab. Select a format from the Date and Time dialog box (**Figure 5.26**). To show the current date and time each time you open the document, click Update automatically. Otherwise, the date/time entered at this moment will be treated as static text. Click OK.
    - ▲ To insert a page number, click the Quick Parts icon in the Insert group and choose Field. In the Field dialog box (**Figure 5.27**), select Page from the field list, select a number format from the Format list, and click OK.
  3. To insert another element, click the Insert Alignment Tab icon in the Position group. In the Alignment Tab dialog box (**Figure 5.28**), select a position in the header or footer for the new element (Left, Center, or Right) and click OK. Repeat for a third element, if desired.
- By default, an element on the left side of the page is left-aligned with the left margin, a center element is center-aligned between the two margins, and a right element is right-aligned with the right margin.
4. When you're done entering and editing elements in the header or footer area, do either of the following:
    - ▲ Edit the other area by clicking in it.
    - ▲ Click Close Header and Footer in the Close group (see Figure 5.22 or 5.25).



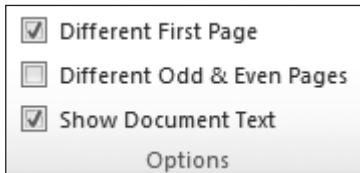
**Figure 5.26** Insert the date, time, or both by selecting a format from the Date and Time dialog box.



**Figure 5.27** To insert page numbers, select the Page field name and specify a display format.



**Figure 5.28** Set an alignment for the new element and click OK.



**Figure 5.29** The Options group.



**Figure 5.30** You can change the distance of the header or footer from the top or bottom of the page, respectively.

- You can reposition the header or footer by entering new settings in the Header from Top or Footer from Bottom boxes in the Position group (**Figure 5.30**).
- To *edit* a header or footer (whether it's gallery-based or one that you created from scratch), follow these same steps. Any element can be deleted or replaced.

## ✓ Tips

- If you find the body text distracting, you can temporarily hide it by removing the check mark from Show Document Text in the Options group (**Figure 5.29**). When you finish working with the header and footer, the body text will reappear.
- If you base a document on a template, you should note that the template may contain a gallery from which you can choose other header and footer styles.
- You can also add graphics to a header or footer, such as a logo or horizontal rule. To insert a graphic element, click the Picture or Clip Art icon in the Insert group.
- Text in a header or footer can be formatted as you like. Select a header or footer element or the entire header or footer. Choose formatting commands from the Mini toolbar or from the Font group on the Home tab.
- A Page field can be preceded by text, such as the word **Page**. Position the text insertion mark before the page number in the header or footer, and then type **Page** and a space.
- Page 1 of certain documents (such as a report with a title or cover page) often has no header/footer or it may need to contain special text. Click the Different First Page check box in the Options group (**Figure 5.29**). You can then leave the page 1 header and footer blank or create a *different* page 1 header and/or footer.
- To create different headers and footers on even/left and odd/right pages (as is often done for books and other publications with facing-page spreads), click the Different Odd & Even Pages check box (**Figure 5.29**).

## Paragraph Formatting

In Word, a *paragraph* (**Figure 5.31**) is any amount of text (a word, line, sentence, or multiple sentences) that ends with a paragraph mark (¶). You finish a paragraph and begin a new one by pressing [Enter]. This action inserts a paragraph mark.

Generally, the new paragraph will have the same formatting as the previous one. The exception is when the *style* assigned to the current paragraph is designed to be followed by a paragraph of a different style. For instance, a heading style is typically followed by a body text style.

Paragraph formatting, such as alignment or indents, can be applied to a selected paragraph by choosing options from the Paragraph group on the Home tab (**Figure 5.32**), the Mini toolbar, or the Paragraph dialog box. You can also apply formatting by choosing a *paragraph style* (discussed later in this chapter).

Paragraph formatting has nothing to do with font, size, style, or color. It is concerned solely with alignment, spacing between lines, indents from one or both margins, and so on.

### ✓ Tips

- Normally, paragraph marks are invisible, but you can show them by clicking the Show/Hide ¶ icon ([Ctrl][\*)] in the Paragraph group on the Home tab. Other normally hidden characters, such as tabs, spaces, and line breaks, also become visible.
- You can force certain characters (such as paragraph marks) to *always* display. Click the File tab to go to the Backstage and then click Options. In the Word Options dialog box, select the Display category, click the check boxes of the items you always want to show (**Figure 5.33**), and click OK.

**Interviewer:** Can you explain to our readers how you get the ideas on what to write about and how you go about preparing and then writing the book?¶

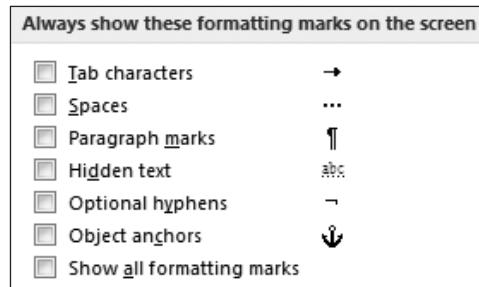
**Steve:** When I first started writing books, I specifically chose topics that held great interest for me—assuming that others shared those same interests. I quickly discovered that this is an excellent way to starve. Now, I try to focus more on fulfilling what I perceive to be major user needs; i.e., I’m “market driven.” With the current move by many software companies to omit manuals from their products, for example, there is a real need for easy-to-follow books that explain in depth how a program works, what its features do, why you would use one feature rather than another to accomplish a particular task, and so on. In most cases, help files are no substitute for decent documentation. And if there’s no documentation at all, this is often a great reason to write a book.¶

**Figure 5.31** Here are three paragraphs, each ending with a paragraph mark. The middle one is a blank paragraph.

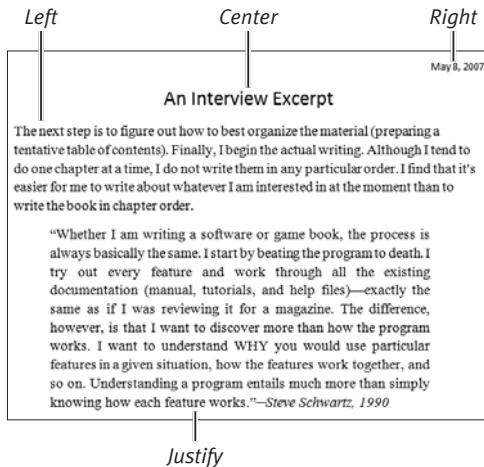


*Paragraph dialog box launcher*

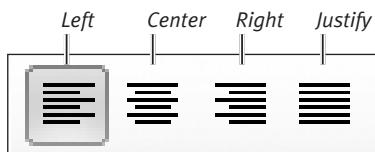
**Figure 5.32** The Paragraph group contains icons for common paragraph-formatting commands.



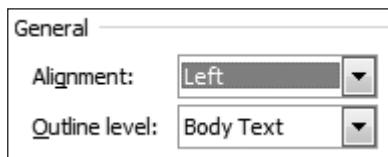
**Figure 5.33** Check the items that will always be shown, regardless of the status of Show/Hide ¶.



**Figure 5.34** No matter how short or long, every paragraph has an alignment.



**Figure 5.35** Click an alignment icon in the Paragraph group.



**Figure 5.36** In the Paragraph dialog box, choose an option from the Alignment drop-down menu.

## Setting Alignment

A paragraph's *alignment* determines its position in relation to the margins. Every paragraph must have one of the following alignments (**Figure 5.34**):

- ◆ **Left.** The left edge of the paragraph is flush with the left margin and the right edge is ragged. Body text of most documents is left-aligned.
- ◆ **Right.** The right edge of the paragraph is flush with the right margin and the left edge is ragged.
- ◆ **Center.** Each line of the paragraph is automatically centered between the two margins. Center alignment is sometimes applied to titles and other headings.
- ◆ **Justify.** Both edges of the paragraph are flush with a margin. As necessary, Word adjusts the spacing between words to enable each line to be flush with the margins. Magazine copy and block quotations are often justified.

### To set paragraph alignment:

1. Select one or more paragraphs.  
To select a single paragraph, it's sufficient to set the text insertion mark in it. To select multiple paragraphs, drag a selection through at least part of each one.
2. *Do one of the following:*
  - ▲ On the Home tab, click an alignment icon in the Paragraph group (**Figure 5.35**).
  - ▲ Press an alignment keyboard shortcut: Left **[Ctrl][L]**, Center **[Ctrl][E]**, Right **[Ctrl][R]**, or Justify **[Ctrl][J]**.
  - ▲ In the Paragraph dialog box, click the Indents and Spacing tab, choose an alignment (**Figure 5.36**), and click OK.
  - ▲ Click the Center alignment icon on the Mini toolbar.

## Setting Indents

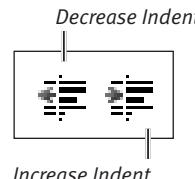
Every paragraph has three indents that you can set to specify the distance between the text and the left/right margins:

- ◆ **Left.** Distance from the left margin.
- ◆ **Right.** Distance from the right margin.
- ◆ **First line.** Distance from the left margin that applies only to the paragraph's first line of text.

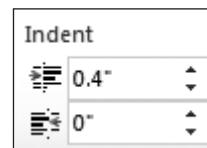
Indents are automatically set for bulleted and numbered lists (*hanging indents*). You can set equal left and right indents of 0.5" or 1" to format a block quote. Indents can be set on the horizontal ruler or in the Paragraph dialog box. Any or all indents can be set to 0.

### To set indents:

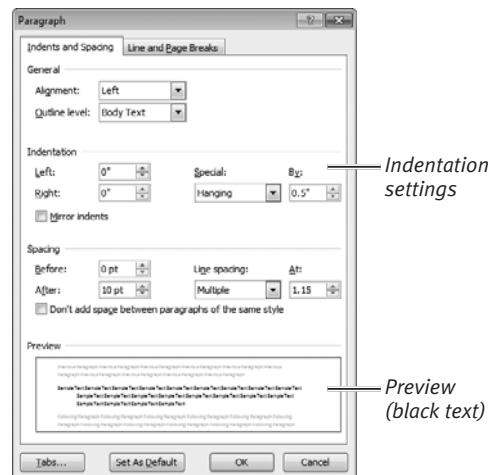
- ◆ Select one or more paragraphs, and then *do any of the following*:
- ▲ **Paragraph group (Home tab).** To increase or decrease the left indent in increments of 0.5", click the Increase Indent or Decrease Indent icon in the Paragraph group (Figure 5.37) or on the Mini toolbar.
- ▲ **Paragraph group (Page Layout tab).** Enter numbers (in inches) in the Left and/or Right box (Figure 5.38).
- ▲ **Paragraph dialog box.** You can also set exact indents on the Indents and Spacing tab (Figure 5.39). To create a first line indent (similar to starting each paragraph by pressing [Tab]), choose First line from the Special drop-down menu and set the indent. To create a hanging indent for a bulleted or numbered list, choose Hanging from the Special drop-down menu.
- ▲ **Horizontal ruler.** You can manually set indents by dragging markers on the horizontal ruler (Figure 5.40).



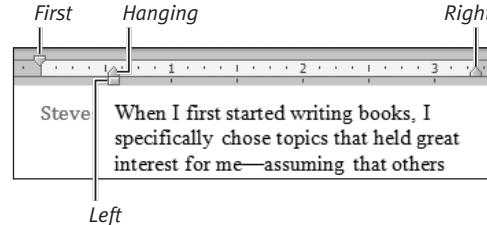
**Figure 5.37** Click an icon to decrease or increase the left indent by half an inch.



**Figure 5.38** You can set precise left and right indents.



**Figure 5.39** You can create any kind of indent in the Paragraph dialog box.



**Figure 5.40** To create this outdent, I dragged the first line indent marker to the left.

## ✓ Tips

- You can use the Paragraph dialog box to create an *outdent* (extending to the left of the left margin) by entering a negative number for the left indent (see Figure 5.40).
- When setting indents on the ruler, you'll note the following behaviors:
  - ▲ The first line and right indent markers move independently of other markers.
  - ▲ The left and hanging indent markers move as a pair.
  - ▲ When you drag the left indent marker, it and the hanging indent marker maintain their current distance from the first line indent marker.
  - ▲ Drag the hanging indent marker to change its distance (and that of the left indent marker) from the first line indent marker.

## Working with Tabs

The ability to set indents and create tables in Word has virtually eliminated the need to use tabs in most documents. However, if you *do* need them to create a column of numbers aligned on the decimal point, for example, here's what you should know:

- ◆ By default, you can press [Tab] at the start of or within a paragraph to space to the next 0.5" increment on the ruler.
- ◆ To set a left tab for selected paragraphs, click the desired spot on the horizontal ruler.
- ◆ To create other types of tab stops (right, center, decimal, or bar), modify existing tab stops, or specify a *leader character* (such as a string of periods), double-click a tab marker on the ruler. Make the necessary changes in the Tabs dialog box.
- ◆ Change a tab stop position by dragging its marker or by entering a new position in the Tabs dialog box.
- ◆ You can remove a tab stop by dragging its marker from the ruler onto the document page.

## Creating Lists

*Bulleted and numbered lists* are special kinds of hanging indent paragraphs. The hanging portion is either a bullet character (such as a filled or empty circle, diamond, or check mark) or a sequential number. You can create such lists *automatically* (depending on settings in Word Options) or *manually* (by applying a bullet or number format to a set of paragraphs).

You can also create lists with multiple levels of indents. These *multilevel lists* can contain sublists beneath any list item.

### To enable automatic bulleted and numbered lists:

1. Open the Word Options dialog box by clicking the File tab, followed by the Options button.
2. Select the Proofing category.
3. Click the AutoCorrect Options button near the top of the dialog box.
4. In the AutoCorrect dialog box, select the AutoFormat As You Type tab.
5. In the Apply as you type section of the dialog box (**Figure 5.41**), enable Automatic bulleted lists and Automatic numbered lists.
6. Click OK to close the AutoCorrect dialog box.
7. Click OK to close the Word Options dialog box.

#### ✓ Tip

- This is a one-time procedure. You'll have to revisit it only if you want to stop automatically creating one or both list types.

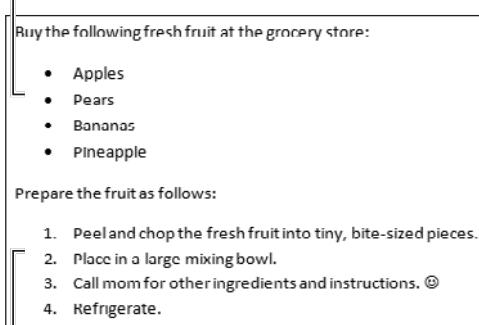


**Figure 5.41** Enable the automatic creation of bulleted and numbered lists by clicking these check boxes.

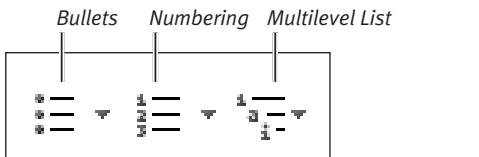
### Before, During, or After?

It's important to understand that paragraph and character formatting can be applied at *any* time: before you begin typing a paragraph or text block, as you type it, or after you've written and edited it.

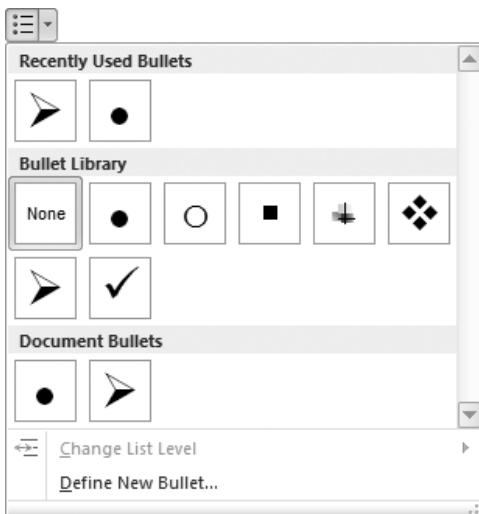
And there's no single best approach—it depends on your writing style. For example, if you're making a numbered list, you can start a new paragraph, apply the number format, and then type the first item. For each additional paragraph you create, the numbering increments. On the other hand, it can be just as easy to write the entire list, select it, and *then* apply the numbered paragraph format.

**Bulleted list****Numbered list**

**Figure 5.42** Examples of an automatic bulleted list and a numbered list.



**Figure 5.43** You can create a list by clicking an icon or by choosing a style from a drop-down gallery.



**Figure 5.44** The Bullet gallery.

**To automatically create a list:**

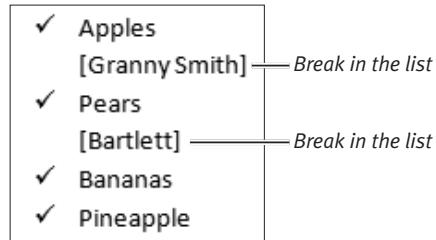
- At the beginning of a new paragraph, do one of the following:
  - **Bulleted list.** To create the first item, type an asterisk (\*) and a space. The asterisk is converted to a bullet.
  - **Numbered list.** To create the first item, type 1. and a space. This item becomes the first in a numbered list.
- Finish the item paragraph and press [Enter]. Additional consecutive paragraphs you create by pressing [Enter] will continue the bullets or numbering.
- To complete the final list item (**Figure 5.42**), press [Enter] twice.

**To manually create a list:**

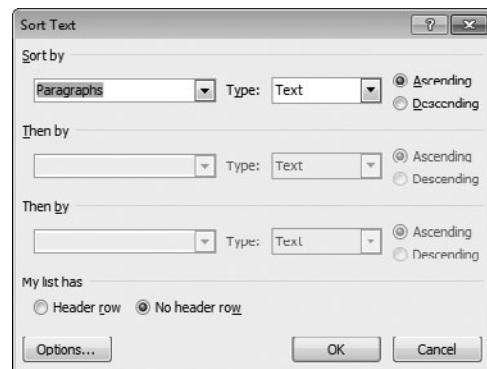
- Do either of the following:
  - To create a bulleted or numbered list using the most recently applied bullet or number style, click the Bullets or Numbering icon in the Paragraph group of the Home tab (**Figure 5.43**) or on the Mini toolbar.
  - Select a specific bullet or numbering style from the Bullets or Numbering icon's gallery (**Figure 5.44**).
- Finish the item paragraph and press [Enter]. Additional consecutive paragraphs that you create by pressing [Enter] will continue the bullets or numbering.
- To complete the final list item, press [Enter] twice.

## ✓ Tips

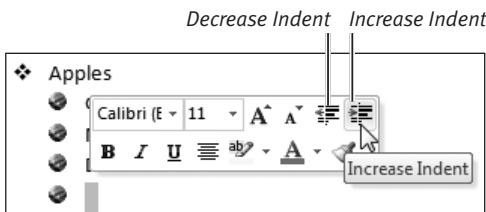
- You can also end a bullet or numbered list by clicking the Bullets or Numbering icon in the Paragraph group (see Figure 5.43).
- There are other characters you can type (followed by a period and a space) to automatically start a numbered list with a different numbering format, such as a., A., i., and I.
- To type additional text directly beneath a bulleted or numbered point without interrupting the bullets or numbering (Figure 5.45), end the previous line by pressing **Shift+Enter** to create a *line break*. Type the additional text on the new line. When you press **Enter** to end the line or paragraph, the bullets or numbering will resume.
- You can change the bullet or numbering style for an existing list. Select all bulleted or numbered points, and then select a style from the Bullet or Numbering gallery (see Figure 5.44). A live preview appears as you rest the cursor on a style.
- To change a list from bullets to numbers or vice versa, click the other icon in the Paragraph group of the Home tab (see Figure 5.43) or on the Mini toolbar.
- You can sort a bulleted list alphabetically, numerically, or in date order. Select the items, click the Sort icon in the Paragraph group on the Home tab, and set options in the Sort Text dialog box (Figure 5.46).
- You can change the formatting of all bullets and numbers in a list. Click one to select them all. Apply character formatting (such as a new font, boldface, or a color) by choosing options from the Font group on the Home tab or from the Mini toolbar.



**Figure 5.45** You can interrupt a list without ending it.



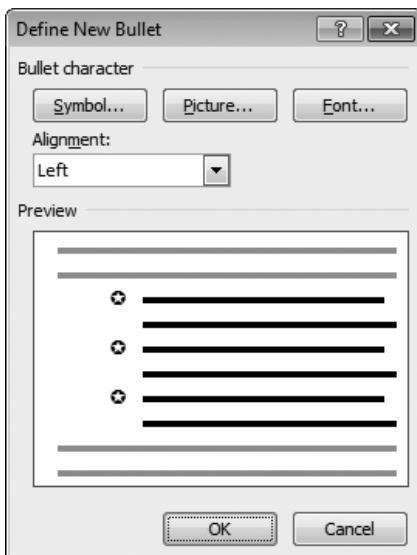
**Figure 5.46** These settings can be used to sort a bulleted list alphabetically.



**Figure 5.47** To set or change an item's level, click the Decrease Indent or Increase Indent icon.



**Figure 5.48** A multilevel bulleted list.



**Figure 5.49** You can create new bullets by choosing a symbol character or an image.

## To create a multilevel list:

1. Begin an automatic or manual list by following the previous task instructions.
2. To enter an item at a new level, click the Increase Indent icon in the Paragraph group of the Home tab (see Figure 5.37) or on the Mini toolbar (Figure 5.47). Additional items created at the same indent level by pressing **Enter** will have the same bullet or number style.
3. To convert an item to a higher level, click the Decrease Indent icon in the Paragraph group of the Home tab (see Figure 5.37) or on the Mini toolbar (Figure 5.47).
4. To specify the bullet or number format to be applied to each level, click the Multilevel List icon in the Paragraph group of the Home tab and select a style from the gallery. Your list is reformatted to match the gallery selection (Figure 5.48).

## ✓ Tips

- To select all items at a particular level in a bulleted or numbered list, click the bullet or number for any item at that level.
- You can substitute other bullets for the ones in the gallery. Click the down arrow beside the Bullets icon in the Paragraph group of the Home tab and choose Define New Bullet (see Figure 5.44). Or right-click any selected bullet and choose Bullets > Define New Bullet from the context menu. In the Define New Bullet dialog box (Figure 5.49), click Symbol or Picture to select a character from an installed font (such as Symbol, Wingdings, or Webdings) or to use an image file, respectively.
- You can also change levels by pressing **Tab** (increase) or **Shift Tab** (decrease).

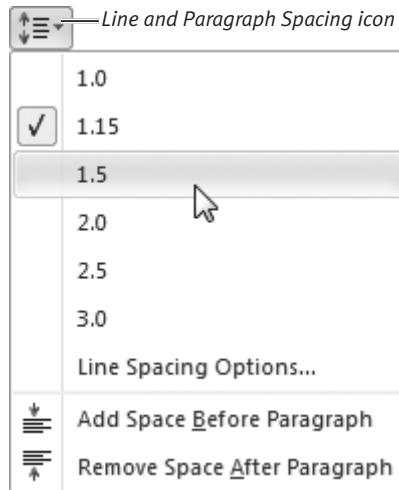
## Changing Paragraph and Line Spacing

Paragraph attributes also include the space between lines, as well as the space before and after a paragraph. Although line spacing and between-paragraph spacing are defined as part of every paragraph style, there are times when you'll want to change these settings. For instance, if a document is a few lines too long, you can make it fit in fewer pages by reducing the line spacing. Similarly, if an instructor insists on *double-spaced text* (a typewriter term), you can approximate it on a computer by increasing the line spacing of all paragraphs.

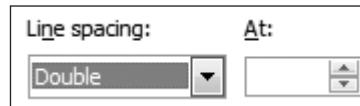
### To change line spacing for paragraphs:

1. Select the paragraph(s) that will be affected by the new setting.
2. Click the Line and Paragraph Spacing icon in the Paragraph group of the Home tab, and choose one of the following from the drop-down menu (**Figure 5.50**):
  - ▲ Choose a number, representing the space between each pair of lines. (Double spacing is **2.0**, for example.)
  - ▲ Choose Line Spacing Options. The Paragraph dialog box opens. On the Indents and Spacing tab, set the Line spacing (**Figure 5.51**), and click OK.

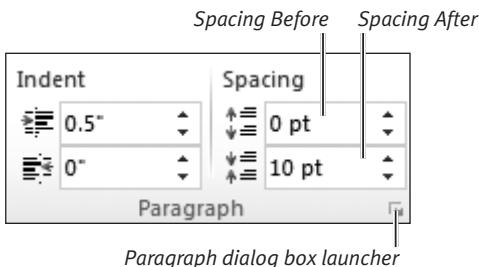
The selected paragraphs are reformatted.



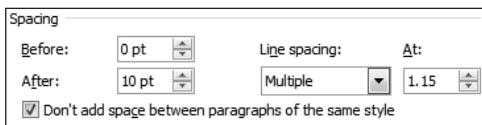
**Figure 5.50** The Line and Paragraph Spacing drop-down menu.



**Figure 5.51** You can select a line spacing option from this drop-down list.



**Figure 5.52** Enter numbers in these boxes to set the before and after spacing.



**Figure 5.53** Set the before and after spacing (in points), and then click OK.

## To change the before or after spacing for selected paragraphs:

1. Select the paragraph or paragraphs that will be affected by the new settings.
2. *Do one of the following:*
  - ▲ In the Paragraph group on the Page Layout tab (**Figure 5.52**), enter numbers (in points) in the Spacing Before and/or Spacing After boxes.
  - ▲ At the bottom of the Paragraph group on the Home or Page Layout tab, click the Paragraph dialog box launcher (Figure 5.52). On the Indents and Spacing tab of the Paragraph dialog box, enter numbers (in points) in the Before and/or After boxes (**Figure 5.53**). Click OK to close the dialog box.
  - ▲ In the Paragraph group of the Home tab, click the Line and Paragraph Spacing icon. Choose Add (Remove) Space Before Paragraph or Add (Remove) Space After Paragraph (see Figure 5.50) to add a 12-point space or remove the current space.

The new before/after spacing is applied to the selected paragraphs.

### ✓ Tips

- In general, it's best to avoid applying new spacing settings directly to paragraphs. Unless you're consistent, you may end up with a very ugly document. Instead, modify the document's paragraph *styles*. Doing so will ensure consistency because all paragraphs to which you've assigned a particular style will automatically update to reflect the new settings. Styles are discussed later in this chapter.
- To set line spacing in *points* (72 per inch), choose Exactly from the Line spacing drop-down menu (Figure 5.53).
- New line spacing and before/after settings affect only the currently selected paragraphs. To apply these settings to an entire document, set the text insertion mark and press **Ctrl A**. Or click the Select icon in the Editing group of the Home tab and choose Select All.
- If a paragraph or paragraph style is set for no (0) space before and after, it may be difficult to distinguish from surrounding paragraphs.

## Character Formatting

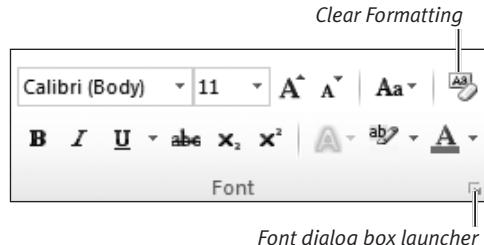
*Character formatting* is formatting that you selectively apply to words, phrases, lines, sentences, or paragraphs. To make a phrase stand out in its sentence, you might format it as italic, boldface, blue, or underlined. If the sentence containing the phrase was formatted with the Arial font, you might apply a variation of the font, such as Arial Narrow or Arial Black.

If you're applying a character format as you type (rather than by selecting existing text), you can think of the formatting as an on/off sequence. You turn the formatting feature on, type the new text, and then turn the feature off when you want to return to the original formatting.

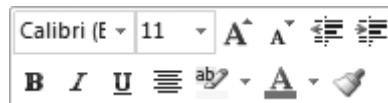
If you want to easily reapply complex character formatting to other text in the document, you can use the Format Painter.

### To apply formatting as you type:

1. To switch to a different character formatting, *do one of the following*:
  - ▲ Choose character-formatting options from the Font group on the Home tab (**Figure 5.54**).
  - ▲ Choose character-formatting options from the Mini toolbar (**Figure 5.55**).
  - ▲ Click the Font dialog box launcher (Figure 5.54) or press **Ctrl D**. Choose new settings in the Font dialog box (**Figure 5.56**) and click OK.
2. Type the text that you want to format with the chosen attribute(s).
3. Disable the attributes chosen in Step 1 by clicking their icons again. If you changed fonts, you can revert to the original font by choosing its name from any Font menu or scrolling list.



**Figure 5.54** Common character-formatting attributes can be chosen from the Font group on the Home tab.



**Figure 5.55** The Mini toolbar provides only basic character-formatting options.



**Figure 5.56** Every supported character-formatting attribute can be selected in the Font dialog box.

**To apply formatting to existing text:**

1. Select the text to which you want to apply a different character formatting.
2. *Do any of the following:*
  - ▲ Choose character-formatting options from the Font group on the Home tab (see Figure 5.54). Rest the cursor over any icon to see a ToolTip description of its function.
  - ▲ Choose character-formatting options from the Mini toolbar (see Figure 5.55).
  - ▲ Click the Font Dialog Box Launcher (see Figure 5.54). Choose settings in the Font dialog box (see Figure 5.56) and click OK.

**To remove character formatting:**

1. Select the text from which you want to remove character formatting.
2. *Do any of the following:*
  - ▲ To remove *all* character formatting (leaving only plain text), click the Clear Formatting icon in the Font group of the Home tab (see Figure 5.54).
  - ▲ To selectively remove formatting (when you've applied multiple attributes to the selected text), click icons of the formats you want to remove in the Font group or Mini toolbar.
  - ▲ Click the Font Dialog Box Launcher (see Figure 5.54). Choose new settings in the Font dialog box (see Figure 5.56) and click OK.

## Changing the Default Font

Whenever you create a new, blank Word document and begin typing, the font used is the *default font*. You can easily change the default font, if you like.

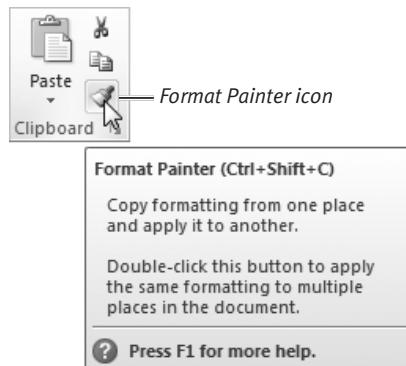
1. Open the Font dialog box. The font, style, size, and other attributes of the currently selected text are shown.
2. To specify attributes other than those of the selected text, select a font and other attributes from the drop-down lists and check boxes.
3. Click the Set as Default button. In the dialog box that appears, select All documents based on the Normal.dotm template. Click OK.
4. Click OK to close the Font dialog box.

## To use the Format Painter to duplicate formatting:

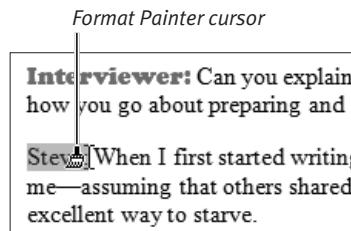
1. Select the text whose formatting you want to duplicate or position the text insertion mark within that text.
2. Click the Format Painter icon in the Clipboard group of the Home tab (**Figure 5.57**) or press **Ctrl****Shift****C**. The Format Painter cursor appears.
3. Drag to select the target text (**Figure 5.58**). The copied character formatting is applied to the target text.

### ✓ Tips

- You also can open the Font dialog box by pressing **Ctrl****D**.
- Many character-formatting commands have keyboard shortcuts. You can apply or remove their formatting by pressing the keys listed in **Table 5.1**.
- You can use the Format Painter to duplicate character *and* paragraph formatting. Select the entire paragraph before clicking the Format Painter icon.
- You can apply copied character attributes to *multiple* selections by double-clicking the Format Painter icon. One by one, drag-select each destination text string. When you're finished, click the Format Painter icon again.
- You can easily apply new attributes to multiple text strings that currently share the same formatting. Select any one of the text strings and switch to the Home tab. Click the Select drop-down menu in the Editing group and choose Select Text with Similar Formatting. As you choose new character formatting, it'll be applied to *all* the text selections.



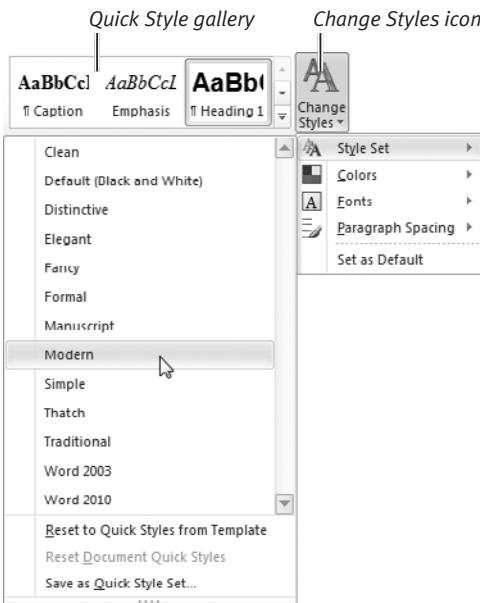
**Figure 5.57** The Format Painter tool.



**Figure 5.58** Using the Format Painter, it's easy to duplicate text formatting.

**Table 5.1**

Character-Formatting Keyboard Shortcuts	
<b>KEYPRESS</b>	<b>DEFINITION</b>
<b>Ctrl</b> <b>B</b>	Boldface
<b>Ctrl</b> <b>I</b>	Italic
<b>Ctrl</b> <b>U</b>	Underline (single)
<b>Ctrl</b> <b>Shift</b> <b>D</b>	Underline (double)
<b>Ctrl</b> <b>Shift</b> <b>W</b>	Underline words but not spaces
<b>Ctrl</b> <b>Shift</b> <b>K</b>	Small capital letters (caps)
<b>Ctrl</b> <b>=</b>	Subscript
<b>Ctrl</b> <b>+</b>	Superscript
<b>Ctrl</b> <b>&lt;</b>	Decrease font size
<b>Ctrl</b> <b>&gt;</b>	Increase font size
<b>Shift</b> <b>F3</b>	Change letter case
<b>Ctrl</b> <b>Spacebar</b>	Remove manual character formatting



**Figure 5.59** Choose a new Quick Style set from the Style Set submenu.

## Working with Styles

A *style* is a set of formatting instructions you can apply to selected paragraphs or text. By applying styles rather than manually formatting a document, you can ensure that the formatting is consistent throughout—resulting in a document with a professional appearance.

The *Quick Style gallery* (found in the Styles group on the Home tab) contains a subset of all defined styles for the current document. Designed to help you easily apply the most common paragraph and character styles to selected text, Quick Styles encourage users who have previously ignored styles to start using them.

If you create a document from scratch, there are several Quick Style sets available to you, each designed to convey a certain style and tone. If you create a document from a template, a Quick Style set may be included with the template. You can customize the active Quick Style set by adding new styles and removing unwanted ones.

### To switch Quick Style sets:

1. Click the Change Styles icon in the Styles group of the Home tab.
2. From the Style Set submenu, choose a new style set (**Figure 5.59**). As you drag the cursor over each set name, a live preview of the resulting style changes is applied to all visible text.

The current Quick Style set is replaced by the chosen set.

## WordArt and Text Effects

In Chapter 3, you learned how to create *WordArt*, a decorative text object. In Word, you can use the Text Effects command to apply the same decorative effects without changing the selected text into an object.

1. Select the text (such as a heading) that you want to format.
2. On the Home tab, click the Text Effects icon in the Font group and choose an effect from the gallery. Each effect provides a live preview.

You can modify other characteristics of the text (such as its font, size, or color) without losing the applied text effect.

## To apply a style:

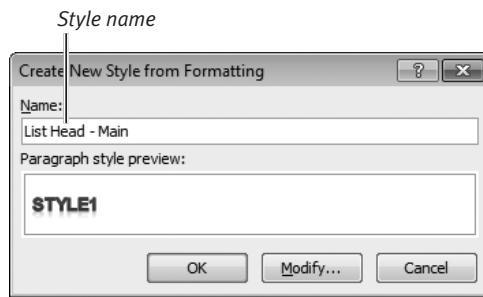
- Select a text string or paragraph to which you want to apply a style.
- Open the Quick Style gallery. Move the cursor over a style icon (Figure 5.60). A preview of the style is displayed on the text.
- If this is the correct style, click its icon to apply it to the text.

## To add a new style to the current set:

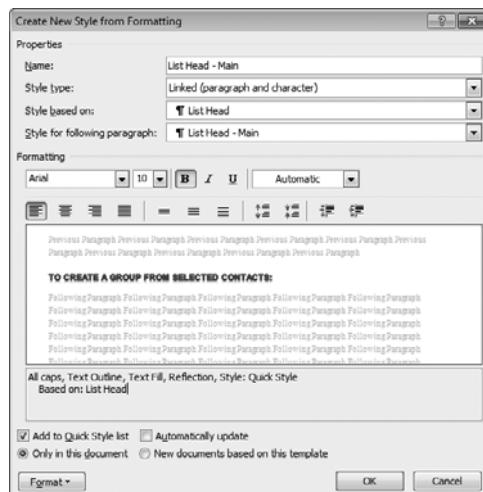
- You can create new Quick Styles from formatted text or paragraphs in the current document. Begin by applying the desired character formatting to some text or by applying paragraph formatting to a paragraph.
  - Select the formatted word, text string, or paragraph.
  - Choose Save Selection as a New Quick Style from the Quick Style gallery menu (Figure 5.60). The Create New Style from Formatting dialog box appears (Figure 5.61).
  - Name the new style and click Modify. A new dialog box appears (Figure 5.62).
  - Make any additional formatting changes that are required. Ensure that the setting for Style type matches the kind of style you want to create: Character, Paragraph, or Linked (paragraph and character). Click the Format button to view other options. Click OK to return to the previous dialog box.
  - Click OK.
- An icon for the style appears in the Quick Style gallery. The style definition is added to the document's style list.



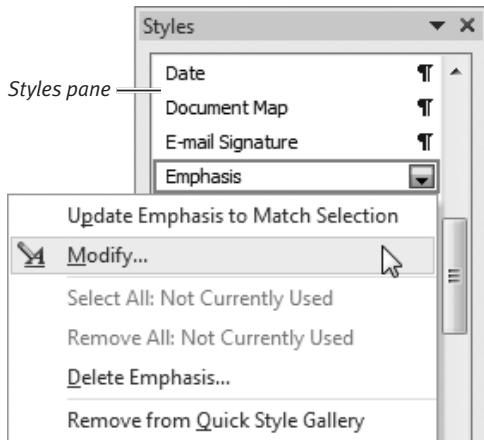
**Figure 5.60** The gallery for a Quick Style set.



**Figure 5.61** Name the new style.



**Figure 5.62** Make any necessary changes and click OK.



**Figure 5.63** The Styles pane lists *all* defined styles for the document. To open the pane, click the Styles dialog box launcher at the bottom of the Styles group.

### To modify a style by example:

1. Make the desired changes to a text string or paragraph that is formatted with the style you want to modify.
2. Select the modified text or paragraph, right-click the selection, and choose Styles > Update *style name* to Match Selection. This command can also be chosen from the context menu that appears when you right-click the style's icon in the Quick Style gallery.

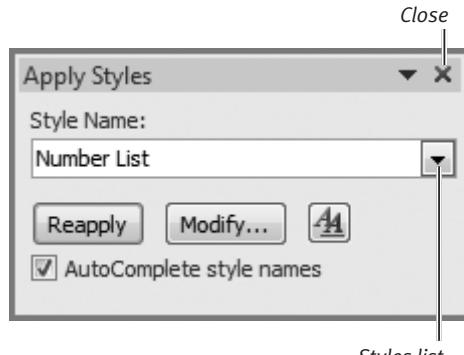
### To modify a style using a dialog box:

1. *Do either of the following:*
  - ▲ Right-click the style icon in the Quick Style gallery and choose Modify.
  - ▲ In the Styles pane (**Figure 5.63**), click the down-arrow beside the style name and choose Modify.

A Modify Style dialog box appears, identical to the one shown in Figure 5.62.
2. Make any desired changes. (Additional options can be chosen by clicking the Format button.) Click OK.  
The modified style definition is stored. Text or paragraphs formatted with the style automatically update to conform to the new definition.

## ✓ Tips

- To add a previously defined (but unlisted) style to the current Quick Style set, click the style's down-arrow in the Styles pane. Choose Add to Quick Style Gallery.
- To remove a style from the current set, right-click its icon in the gallery and choose Remove from Quick Style Gallery. (Note that this only removes the style from the gallery. It does *not* delete the style from the document's style definitions.)
- To *delete* a style (permanently removing it from a document's style list), click the down-arrow beside the style name in the Styles pane and choose Delete *style name* (see Figure 5.63). Text or paragraphs that are presently formatted with the style revert to the default formatting.
- To remove all formatting applied by choosing a particular style, click the down-arrow beside the style's name in the Styles pane and choose Clear Formatting.
- To apply a different style to all text/paragraphs previously assigned a given style, click the down-arrow beside the style in the Styles pane and choose Select All x Instance(s). Reformat the selected material by clicking a new style or by choosing formatting options from the Home tab.
- Another way to open or close the Styles pane is to press **Alt** **Ctrl** **Shift** **S**.
- As an alternative to the Styles pane, you can open a floating window from which you can choose styles to format selected text (**Figure 5.64**). Choose Apply Styles from the bottom of the Quick Style gallery.

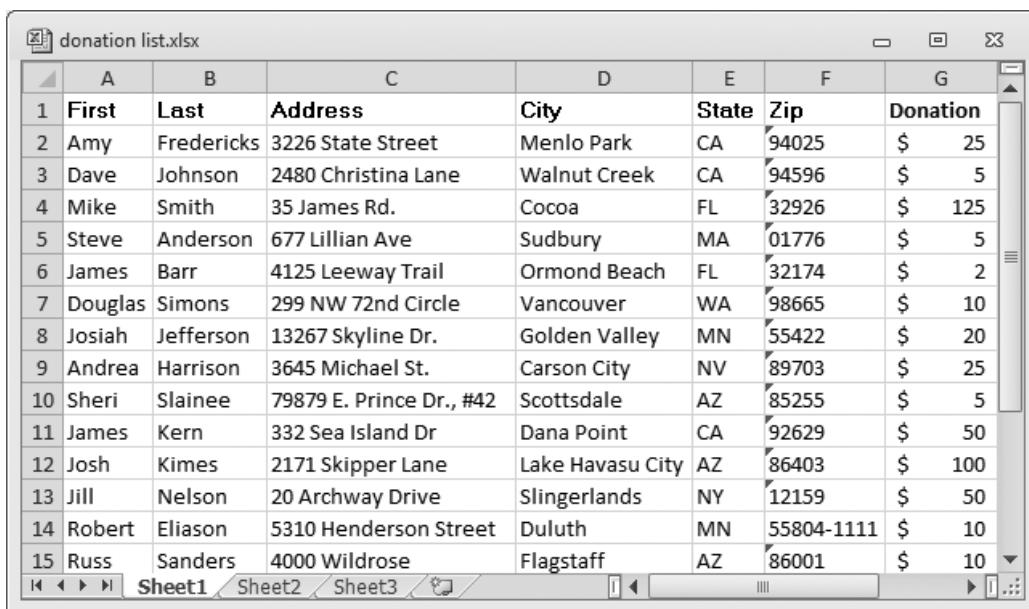


**Figure 5.64** Like the Styles pane, the Apply Styles window contains the complete list of defined styles for the current document. Select a style from the list or type its name.

## Merge Formatting

By adding specially formatted placeholder text called *merge fields* to a document and combining it with data from a second document created in Word, Excel, Outlook, or another application, you can *merge* the two documents—creating a separate, customized version of the Word document for each data record. For example, by inserting name and address placeholders in the main document, you could create a mail merge. A personalized letter containing their address and using their first name in the greeting line could be generated for each person.

The easiest way to learn how to perform a merge is to use the Mail Merge Wizard to walk you through the process. As an example, you'll generate a series of personalized letters. To follow along, create an Excel worksheet similar to the one in **Figure 5.65**. Each row is a data record. Be sure to create at least three or four records.



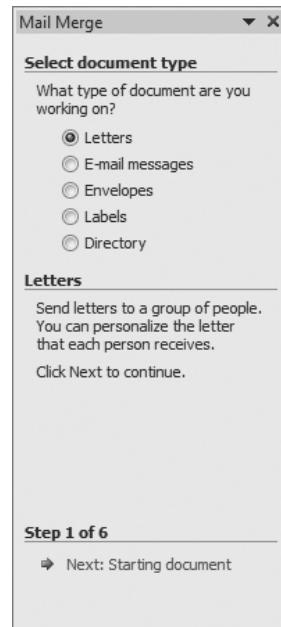
	A	B	C	D	E	F	G
1	First	Last	Address	City	State	Zip	Donation
2	Amy	Fredericks	3226 State Street	Menlo Park	CA	94025	\$ 25
3	Dave	Johnson	2480 Christina Lane	Walnut Creek	CA	94596	\$ 5
4	Mike	Smith	35 James Rd.	Cocoa	FL	32926	\$ 125
5	Steve	Anderson	677 Lillian Ave	Sudbury	MA	01776	\$ 5
6	James	Barr	4125 Leeway Trail	Ormond Beach	FL	32174	\$ 2
7	Douglas	Simons	299 NW 72nd Circle	Vancouver	WA	98665	\$ 10
8	Josiah	Jefferson	13267 Skyline Dr.	Golden Valley	MN	55422	\$ 20
9	Andrea	Harrison	3645 Michael St.	Carson City	NV	89703	\$ 25
10	Sheri	Slainee	79879 E. Prince Dr., #42	Scottsdale	AZ	85255	\$ 5
11	James	Kern	332 Sea Island Dr	Dana Point	CA	92629	\$ 50
12	Josh	Kimes	2171 Skipper Lane	Lake Havasu City	AZ	86403	\$ 100
13	Jill	Nelson	20 Archway Drive	Slingerlands	NY	12159	\$ 50
14	Robert	Eliason	5310 Henderson Street	Duluth	MN	55804-1111	\$ 10
15	Russ	Sanders	4000 Wildrose	Flagstaff	AZ	86001	\$ 10

**Figure 5.65** Data in this worksheet will be merged with a Word form letter.

## To perform a merge using the Mail Merge Wizard:

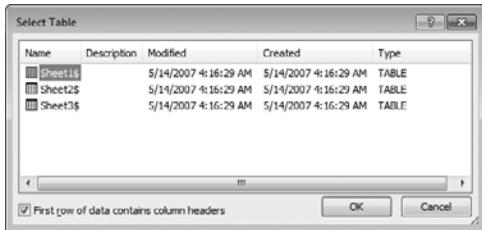
1. In Word, create a document similar to the one shown in **Figure 5.66** (below). Leave space for the mail merge fields.
  2. Open the Mail Merge task pane by selecting the Mailings tab, clicking the Start Mail Merge icon in the Start Mail Merge group, and choosing Step by Step Mail Merge Wizard.
- The Mail Merge task pane appears on the right side of the window (**Figure 5.67**).

Salutation	Donor address	Donation amount
		<p style="text-align: right;">Hamilton Animal Shelter 1867 Jones Drive Hamilton, MA 01886</p> <p>Thank you for your recent contribution of to our shelter. Donations of money, goods, and time by caring people such as yourself help us ensure that homeless pets in our community are properly fed, receive inexpensive shots, participate in our spay/neuter program, and are ultimately placed in loving homes.</p> <p>Thank you again.</p> <p>Sincerely,</p> <p>Steven Schwartz President</p>

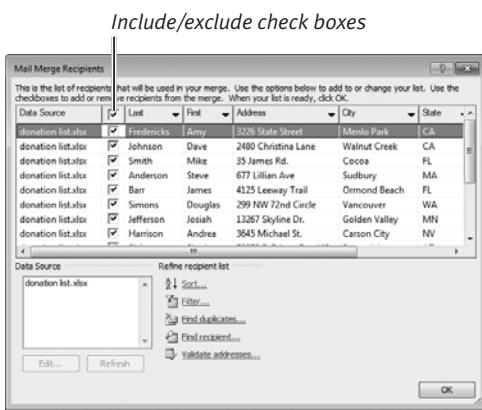


**Figure 5.67** The Mail Merge Wizard: Step 1.

**Figure 5.66** The merge letter can be based on an existing document like this one or created from a template.



**Figure 5.68** Select the first sheet in the workbook. Because the first row of the sheet contains the merge field names, ensure that the check box is checked.



**Figure 5.69** Review the data, ensure that it looks correct, and specify the records to include.

3. Click the Letters radio button and then click Next: Starting document (at the bottom of the task pane).

Step 2 of 6 appears in the task pane.

4. *Select one of the following:*

- ▲ **Use the current document.** If the merge document is open and onscreen, select this option.
- ▲ **Start from template.** If you haven't created the document, select this option. Click the Select template text that appears and then pick a template, such as the Origin Letter.
- ▲ **Start from existing document.** If you've already created the document but it isn't open, select this option, select the document from the list that appears, and click the Open button.

5. At the bottom of the task pane, click Next: Select recipients.

Step 3 of 6 appears in the task pane.

6. Select Use an existing list and then click Browse.

The Select Data Source dialog box appears.

7. Navigate to the drive and folder in which you saved the Excel data file, select the file, and click Open.

The Select Table dialog box appears (**Figure 5.68**).

8. Select the first sheet (Sheet1\$), ensure that First row of data contains column headers is checked, and click OK.

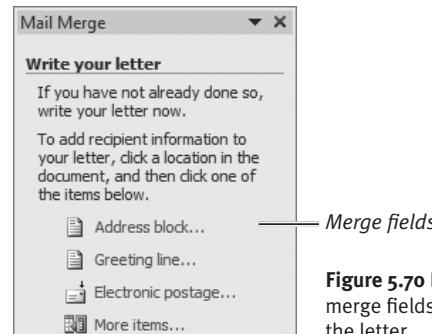
The Mail Merge Recipients dialog box appears (**Figure 5.69**).

9. *Optional:* You can omit a recipient by removing the check mark before his or her last name. Click OK when you're ready to continue.

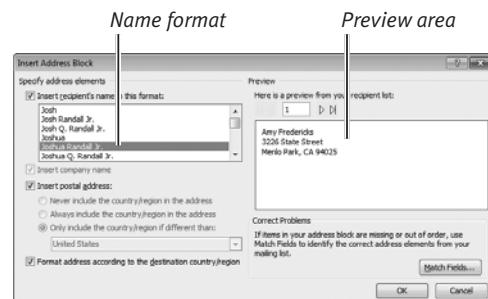
*continues on next page*

## Chapter 5

10. At the bottom of the task pane, click Next: Write your letter.  
Step 4 of 6 (Figure 5.70) appears.
11. To select the spot for the recipient's address in the form letter, set the text insertion mark at the beginning of the line beneath the return address. Click the Address block... text in the task pane. The Insert Address Block dialog box appears (Figure 5.71).
12. Select a format for displaying each person's name. Click the arrows above the preview area to ensure that the names and addresses are displayed correctly. Click OK.
13. Set the text insertion mark where the greeting line ("Dear ...") will appear: two lines below the Address Block field. Click the Greeting line... text in the task pane. The Insert Greeting Line dialog box appears (Figure 5.73).
14. Select options from the drop-down lists to format the greeting line. Click the arrows above the preview area to see how the greeting line looks when filled with your data. Click OK to continue.



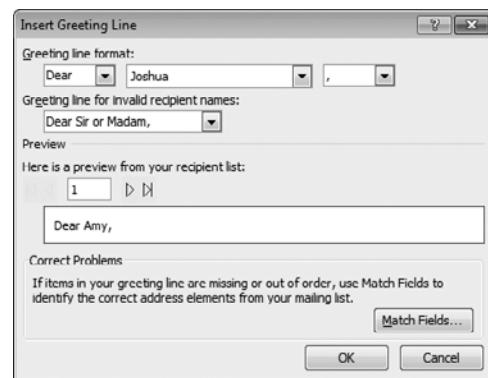
**Figure 5.70** Insert merge fields into the letter.



**Figure 5.71** Select a format for the recipient's name to specify how it will be displayed in the address block.



**Figure 5.72** Each merge field is surrounded by « » characters.



**Figure 5.73** The Insert Greeting Line dialog box.



**Figure 5.74** Select a merge field to add at the text insertion mark.

*Donation merge field*

contribution of \$«Donation» to our shelter.

**Figure 5.75** Add a \$ immediately before the Donation merge field.

- Now you'll add a placeholder for the donation amount. In the first line of the letter, set the text insertion mark after "...contribution of..." Then click More items... in the task pane.

The Insert Merge field dialog box appears (**Figure 5.74**).

- Select the Donation field and click Insert. The Donation merge field is inserted into the letter.
- Close the dialog box by clicking Close.

- The Donation merge field must be preceded by and followed by a space. If either space is missing, insert it now.

- Type a dollar sign (\$) immediately to the left of the merge field (**Figure 5.75**). When the merge procedure extracts the Excel data, the dollar sign will be ignored. But you can add it to the letter.

- At the bottom of the task pane, click Next: Preview your letters. Step 5 of 6 appears, displaying a merge letter (**Figure 5.76**).

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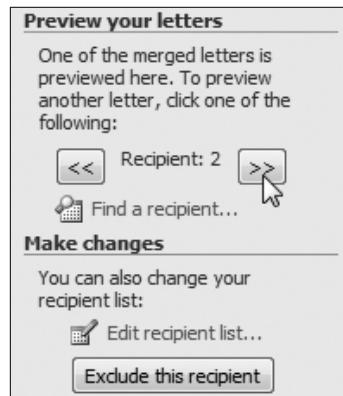
	Hamilton Animal Shelter 1867 Jones Drive Hamilton, MA 01886
Amy Fredericks 3226 State Street Menlo Park, CA 94025	<i>Address block</i>
Dear Amy,	<i>Donation amount</i>
Thank you for your recent contribution of \$25 to our shelter. Donations of money, goods, and time by caring people such as yourself help us ensure that homeless pets in our community are properly fed, receive inexpensive shots, participate in our spay/neuter program, and are ultimately placed in loving homes.	
Thank you again.	
Sincerely,	
<hr/> Steven Schwartz President	

**Figure 5.76** The form letter now displays data from the Excel file.

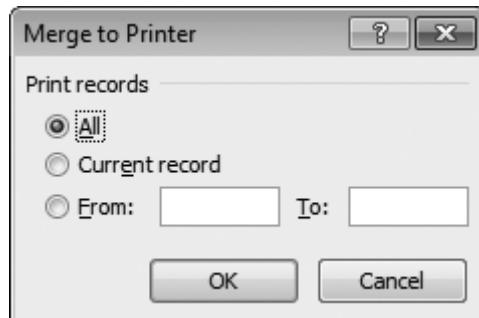
21. Click buttons to examine the recipient letters (**Figure 5.77**). If you see a person whom you don't want to include in the merge, click Exclude this recipient. Navigation buttons are also available in the Preview Results group in the Ribbon.
22. At the bottom of the task pane, click Next: Complete the merge.
23. In Step 6 of 6, *do one of the following:*
  - ▲ Click Print... to merge directly to a connected printer. A separate letter will be printed for each recipient.
  - ▲ Click Edit individual letters... to generate a new Word document as the merge output.
A Merge to Printer or Merge to New Document dialog box appears (**Figure 5.78**).
24. Specify the records to use in the merge and click OK.

### ✓ Tips

- You can format merge fields. Be sure to select the entire field, including the surrounding bracket characters.
- In the final task pane, the option to Edit individual letters serves several important functions. First, it allows you to edit—or delete—individual letters. Second, because this option generates an ordinary Word document, you can save it on disk as documentation of the mailing. Finally, after you proof the letters and make any necessary edits, printing this document is the same as choosing the Print option. A letter is produced for each recipient.
- In the final step, you can further control the output by clicking icons on the Mailings tab. In particular, if you click Auto Check for Errors in the Preview Results group, additional options appear (**Figure 5.79**).



**Figure 5.77** Examine the letters and, if desired, exclude certain recipients.



**Figure 5.78** Specify which records to include in the printout or the Word output document.



**Figure 5.79** You can specify how Word will handle errors discovered during the merge.