CREATING OUTLINES

If you remember high school or college, you probably remember *outlines* (lists of key points organized into headings and subheadings), too. To demonstrate that you had a thorough plan, teachers may have required you to create an outline before starting a paper or report.

Even after you've left school, you may find that writing an outline is an excellent way to get organized. Whether you're about to write an important report, preparing to give a presentation or lecture, or planning a complicated home renovation, you can create an outline to ensure that you've hit the important points or steps in the proper order. Although dedicated outlining applications may be easier to use or have more features, many users will find Word's Outline view sufficient for handling basic outlining tasks.

✔ Tip

Outline view isn't only for outlines. Because it has some unique tools, such as the ability to collapse sections and easily reorganize paragraphs, it's sometimes helpful to use Outline view to polish a normal document.

About Outline View

As far as Word is concerned, a document is a document. Nothing distinguishes an outline from any other Word document. Outline is merely a *view* you can work in—just like Print Layout view. The only real difference is that Outline view provides special tools for working with outlines.

Figure 6.1 Click the Outline icon to switch to Outline view.

To enter or exit Outline view:

1. Click the View tab on the Ribbon.

2. Click the Outline icon in the Document Views group (**Figure 6.1**).

   The current document is displayed in Outline view (**Figure 6.2**, below). The Outlining tab appears and is automatically selected.

3. To exit from Outline view, click the Close Outline View icon on the Outlining tab (Figure 6.2).

Outline

Figure 6.3 Or click the Outline icon at the bottom of the document window.

✔ Tips

- You can also switch to Outline view by clicking the Outline icon at the bottom of the document window (**Figure 6.3**, above).

- While working in Outline view, you can freely switch tabs to apply formatting, insert objects, and the like.
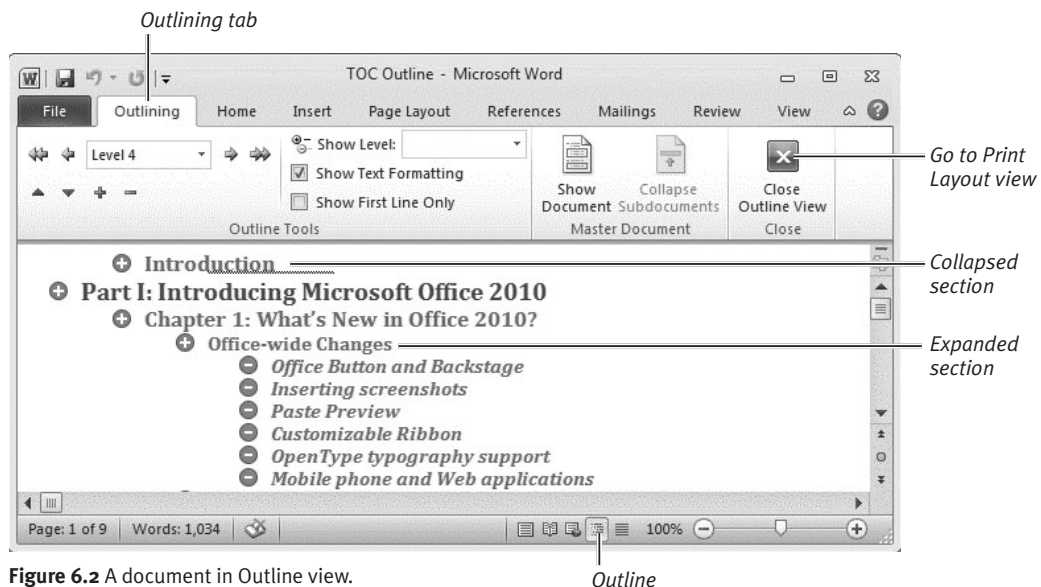
Outlining tab

Figure 6.2 A document in Outline view.

Outline

Level 1 point   *Level 2 point*

Figure 6.4 The level of each point is indicated by its indentation and (typically) its formatting. Each paragraph is considered a separate point.

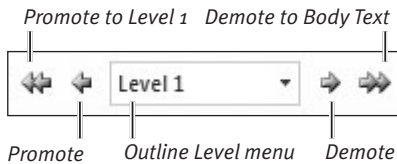*Promote to Level 1*   *Demote to Body Text*

Level 1

Promote   *Outline Level menu*   *Demote*

Figure 6.5 To set or change a point's level, you can use these tools.
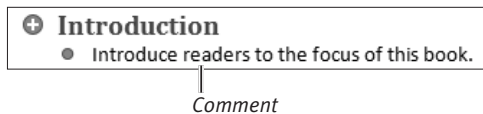
Figure 6.6 A comment is preceded by a solid bullet symbol, rather than a plus (+) or minus (−).

Comment

Starting an Outline

A Word outline consists of outline points and, optionally, comments. Each point is assigned a *level* (**Figure 6.4**); the higher the level, the more important the point. For example, the outline for this book consists of parts, chapters, main headings, and secondary headings, assigned Levels 1, 2, 3, and 4, respectively.

To create an outline:

1. In a new document, click the View tab. Click the Outline icon in the Document Views group (see Figure 6.1).

A minus (−) symbol appears, ready for you to enter the first point.

2. Type the first point and press Enter. The cursor moves to a new line.

3. *Do one of the following:*

▲ To treat the new point as Level 1, enter the text for the point and press Enter.

▲ Use the tools in the Outline Tools group (**Figure 6.5**) to demote this to a Level 2 point by choosing Level 2 from the Outline Level menu, clicking the Demote icon, or pressing Alt Shift →.

▲ To treat the new text as a *comment* (**Figure 6.6**) rather than a point, choose Body Text from the Outline Level menu or click the Demote to Body Text icon.

4. Continue entering outline points. By default, when you press Enter to create a new point, the level of the point matches that of the one immediately above it.

✔ Tip

■ You can *promote* a selected point by choosing a higher level from the Outline Level menu, clicking Promote to Level 1, or clicking Promote (or pressing Alt Shift ←) to raise the level by one.

Point Symbols

A point that has one or more subordinate points is preceded by a plus (+) symbol. A point that has no subordinate points is preceded by a minus (−) symbol.

STARTING AN OUTLINE

Reorganizing an Outline

Creating an outline generally involves a certain amount of reorganizing: changing point levels, adding and deleting points, and moving points and sections to new spots. The first step in reorganizing is to select the point or points that you want to manipulate.

To select outline points:

◆ *Do one of the following:*

▲ **Single point or comment.** Click to the left of the point or comment.

▲ **Point and its subordinate points.** Double-click to the left of the main point (**Figure 6.7**).

▲ **Contiguous series of points.** Click to the left of the first point and drag down.

▲ **Noncontiguous series of points.** Ctrl-click to the left of each point.

✔ **Tip**

■ Selecting a collapsed point also selects its subordinate points.

To insert a new point:

1. Click at the end of the point immediately before where you want to insert the new point and then press Enter.

A line for the new point appears (**Figure 6.8**), set to the same level as the point above it.

2. *Optional:* You can change the new point's level by using a tool in the Outline Tools group (see Figure 6.5).

To delete one or more points:

◆ Select the point or points, and press Del, Delete, or Backspace.

✔ **Tip**

■ Deleting a collapsed point also deletes its subordinate points.
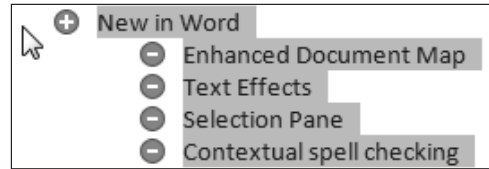

Figure 6.7 Double-click to the left of a point to select the point and its subordinate points, if any.

Figure 6.8 To make room for a new point, I clicked to the right of Template and pressed Enter.

Level Formatting

If you don't care for the fonts, color, or other aspects of the default level formatting applied to your outline, you're free to change it.

◆ *To change the formatting of selected words or entire points,* use normal formatting techniques. You can set options on the Home tab, use the Mini toolbar, or select text and then right-click it.

◆ *To change the formatting for a level throughout the outline,* format a single point for that level, right-click it, and then choose Styles > Update Heading *number* to Match Selection. (The style names for Levels 1–6 are Heading 1–6; comments use the Normal style.)
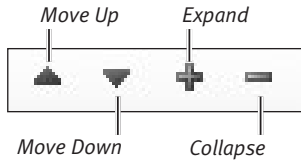
Figure 6.9 Click a Move icon to move the selected point(s) one line at a time.
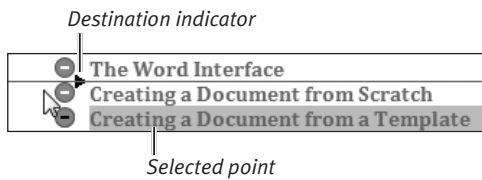

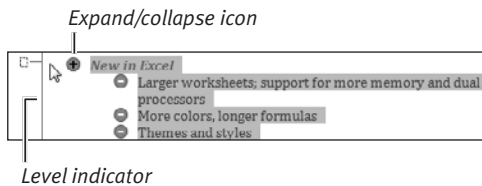**Figure 6.10** You can drag selected points up or down in the outline.

Figure 6.11 You can promote or demote selected points by dragging to the left or right.

To move points up or down:

◆ *Do one of the following:*

▲ Click the Move Up or Move Down icon in the Outline Tools group (**Figure 6.9**). Each click moves the selected point(s) up or down one line in the outline.

▲ Cut the selected point(s) by pressing Ctrl X, click to set the text insertion mark where you want to insert the point(s), and then paste by pressing Ctrl V.

▲ Click the symbol that precedes the point or group of points you want to move, and then drag up or down to the destination (**Figure 6.10**). When you release the mouse button, the dragged point(s) are moved to the new location.

To promote or demote points:

◆ To change the level of points, *do one of the following:*

▲ Use the tools in the Outline Tools group (see Figure 6.5) to demote (Alt Shift →) or promote (Alt Shift ←) the selected point(s).

▲ Drag the symbol that precedes a point (and its subordinates, if any) to the left or right (**Figure 6.11**). Release the mouse button to set the new level.

✔ Tip

■ When moving, promoting, or demoting points, mistakes are commonplace. To correct a move that goes awry, click the Undo icon in the Quick Access Toolbar or press Ctrl Z. To undo *multiple* actions, click the down arrow beside the Undo icon and choose the last action you want to correct. The selected action and all the actions above it in the drop-down list will be undone.

REORGANIZING AN OUTLINE

Changing Display Settings

Word provides viewing features and tools (**Figure 6.12**) to make it easier to work with outlines. You can collapse sections to focus on the rest of the outline; hide lower-level, less significant levels so only important details are visible; or remove level formatting to make it simpler to read the outline.

To change display settings:

◆ *Do any of the following:*

▲ **Collapse sections.** To collapse a section, double-click the + symbol that precedes the section's main point. Or with the section's main point selected, click the Collapse icon in the Outline Tools group (see Figure 6.9) or press Alt Shift −. The section and all its subordinate sections and points collapse (**Figure 6.13**).

▲ **Expand sections.** To expand a collapsed section, double-click the + symbol that precedes the section's main point. Or with the section's main point selected, click the Expand icon in the Outline Tools group (see Figure 6.9) or press Alt Shift +. The section and its subordinate sections expand.

▲ **Show Level.** To focus on higher-level points, you can choose a level number from the Show Level drop-down menu (**Figure 6.14**). Only points at that level or higher are then displayed; lower-level points are collapsed. To view the full outline again, choose All Levels from the drop-down menu.

▲ **Hide formatting.** Remove the check mark from Show Text Formatting to display the entire outline in a single default font, size, and style.

▲ **Show First Line Only.** Click this check box to hide additional lines of text beyond the first for each outline point.
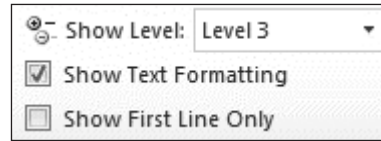

Figure 6.12 View options are set in this section of the Outline Tools group.

Figure 6.13 Collapsed sections are denoted by a squiggly underline. To expand collapsed points, double-click the symbol beside their section heading.
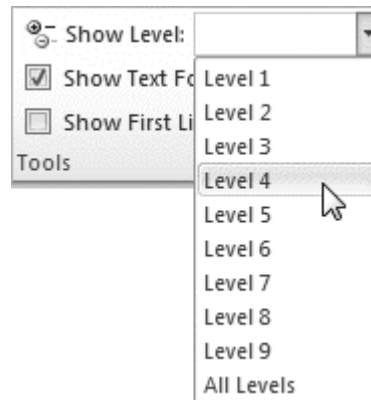

Figure 6.14 Choose the lowest level to display from this drop-down menu.

✔ Tip

■ To print an outline, click the File tab. In the Backstage, click Print and then click the Print button. Note that collapsed points will not print. If Show Text Formatting isn't checked (Figure 6.12), the printout will be in a single default font.

7

SHARING WORD DOCUMENTS

Some Word documents are destined never to leave your hard disk. You might mail a print-out of selected documents as letters, but the actual *files* are meant for your use only.

Other Word documents, however, are meant to make the rounds. You may intend to email them to a friend, share them on the company network, put them out for review by members of a workgroup, or post them on the Web. In this chapter, you'll learn about tools for sharing such documents.

✔ Tips

- See Chapter 2 for information on protecting documents by marking them as final or password-protecting them.

- See Chapter 22 for information on sharing Word, PowerPoint, and Excel documents via the new Office Web Apps.

Choosing a File Format

The most straightforward way to share Word documents is to provide the file—on disk, by email, or via a download link on your Web site. However, the decision concerning which *file format* to use (**Figure 7.1**) depends on the recipient's software and whether the document needs to be editable. The most commonly used Save As formats include:

◆ **Word Document (.docx)**. These native Word 2007/2010 files can be read and edited only by owners of Word 2007 or Word 2010, or by people who have installed the converter software for Office 2000, XP, or 2003.

◆ **Word 97–2003 Document (.doc)**. This binary file format is the one used by Word 97–2003 documents. Recipients with Word 97 or higher (including Word 2007 and 2010) can read and edit .doc files.

◆ **Rich Text Format (.rtf) and Plain Text (.txt)**. Rich Text Format is a good choice for files that must retain their formatting and be readable by other word-processing applications. Plain Text files can be read and edited by *all* word-processing programs and text editors, but character and paragraph formatting are removed.

◆ **PDF (.pdf)**. This is the most common format for the Web distribution of read-only documents that remain true to their original formatting. These Adobe Acrobat files can be opened with Adobe Reader, Apple's Preview, and similar utilities.

✔ Tip

■ Users of Office XP, 2000, or 2003 can download the free Microsoft Office Compatibility Pack from microsoft.com to enable their version of Office to read native Word, Excel, and PowerPoint 2007–2010 documents.
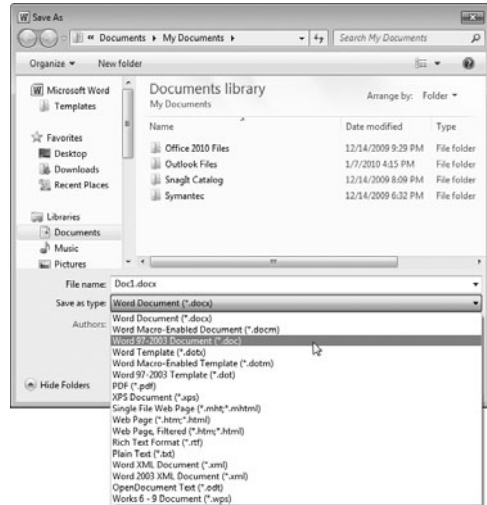

Figure 7.1 To save a copy of a Word document in a different format, click the File tab, click Save As, select a format from the Save as type drop-down list, name the file, and click Save.

Emailing a Document as the Message Body

In addition to emailing documents as attachments, you can send them as the *body* of a message. To do so, you must add a command to the Quick Access Toolbar:

1. Click the File tab, followed by Options.

2. Select the Quick Access Toolbar category in the Word Options dialog box.

3. Select All Commands from the Choose commands from drop-down list.

4. Select Sent to Mail Recipient, click the Add button, and then click OK.

To email any active Word document as the message body, click the new Send to Mail Recipient icon, enter recipients, and click the Send a Copy toolbar icon.

Send Using E-Mail   *Send options*

Figure 7.2 To email a document from within Word, click the File tab, select Share, and choose an option from the Send Using E-mail commands.
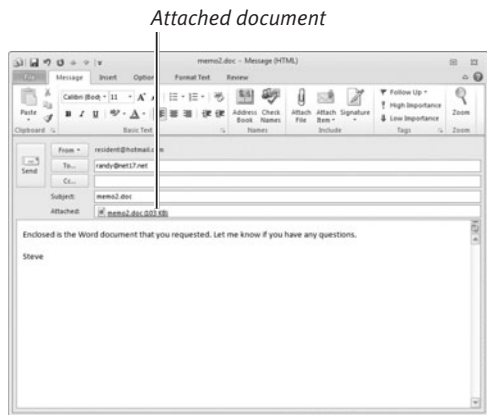
Attached document

Figure 7.3 You can easily enclose the current document in an email message without leaving Word.

✔ Tip

■ Like many file types, XPS files can be opened only by certain programs such as Internet Explorer 7/8 and XPS Viewer.

Emailing Word Documents

As explained in Chapter 19, *any* kind of document (including Word files) can be sent as an attachment to an email message. In addition to attaching the file within Outlook or another email client, you can attach Word documents to messages from within Word.

To send a Word document as a message attachment:

1. In Word, open the document you want to send via email. Ensure that any recent changes have been saved.

2. *Optional:* To send the document as Word 97–2003, Rich Text Format, or Plain Text format, click the File tab, choose Save As, and save a copy of the document in the desired format.

   The document in the new format becomes the active document.

3. Click the File tab, select Share, and then select Send Using E-mail. Click one of the following command icons (**Figure 7.2**):

   ▲ **Send as Attachment.** A message window opens with the current document attached as a Word file (**Figure 7.3**). Enter recipients, type the message text, and click Send.

   ▲ **Send as PDF, Send as XPS.** A message window opens with the current document attached as an Adobe Acrobat (PDF) or XML Paper Specification (XPS) file. Enter recipients, type the message text, and click Send.

   ▲ **Send as Internet Fax.** The document is transmitted as a fax using an Internet Fax service. If you don't have a fax service provider, you can enroll with one after choosing this option.

   The document is transmitted.

Change Tracking

When multiple people will be working on, reviewing, or commenting on a document, you can use Word's *change tracking* features to simplify and coordinate the process. When change tracking is enabled, you can see every modification made to a document: deletions, insertions, and formatting changes. If multiple people are editing the document, each person's changes are differentiated from everyone else's. During the writing and editing or at the end of the process, the document's author can finalize the document, accepting or rejecting each suggested change.

To enable/disable change tracking:

◆ *Do either of the following:*

   ▲ Click the Review tab, click the Track Changes icon in the Tracking group, and choose Track Changes.

   ▲ Press Ctrl Shift E.

When enabled, the Track Changes icon turns orange (**Figure 7.4**).

To set tracking options:

1. Click the Review tab, click the Track Changes icon in the Tracking group, and choose Change Tracking Options.

The Track Changes Options dialog box appears (**Figure 7.5**).

2. Make any desired changes and click OK.

To set the view for change tracking:

1. On the Review tab, choose an option from the Display for Review drop-down menu (**Figure 7.6**).

Original refers to the original document, prior to any edits. *Final* displays the document as if all changes have been accepted.

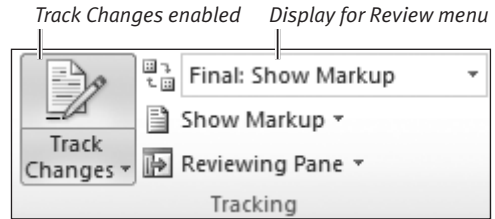**2.** Click the Show Markup icon and choose Balloons, followed by a method for displaying revisions.

Track Changes enabled   *Display for Review menu*

Figure 7.4 Change tracking and its options are set in the Tracking group on the Review tab.
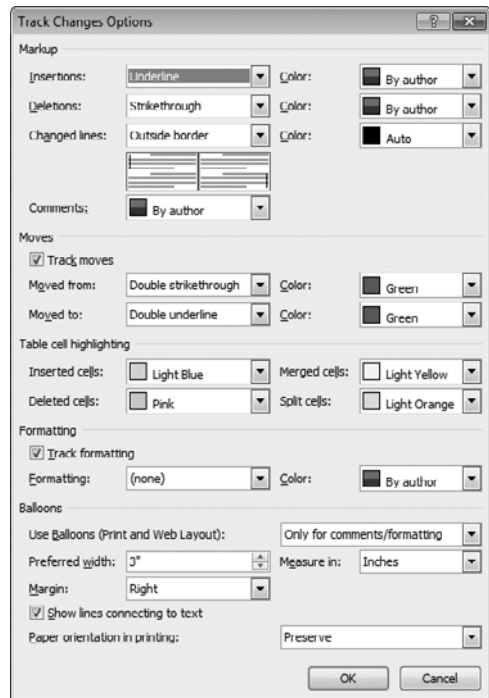

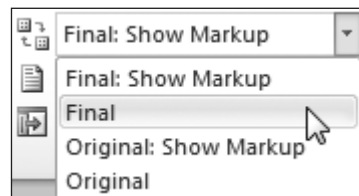**Figure 7.5** You can set the color and formatting of various edits in the Track Changes Options dialog box.

Figure 7.6 Choose a display option for the document from this menu.

Figure 7.7 The Reviewing Pane presents all edits in a scrolling list. Double-click any entry to scroll the document directly to that edit.
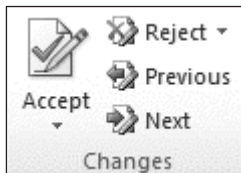

Figure 7.8 Process revisions by clicking these Changes icons.

■ To accept or reject *all* edits, choose Accept All Changes in Document or Reject All Changes in Document from the Accept or Reject icon's menu.

■ If you mistakenly accept or reject an edit, you can reverse your action by immediately clicking the Undo icon in the Quick Access Toolbar or by pressing Ctrl Z.

■ Excel has change tracking, too. When it's enabled (in the Changes group on the Review tab), users can hover the cursor over any changed cell to see the change details. PowerPoint, on the other hand, only allows you to add comments.

To process document revisions:

1. *Optional:* Open the Reviewing Pane (**Figure 7.7**) by clicking the Reviewing Pane icon and choosing a display option: Vertical or Horizontal.

2. Click in the document at the point where you want to start and, using the icons in the Changes group (**Figure 7.8**), *do the following for each revision:*

   ▲ To accept the current revision, click the Accept icon or choose an option from the icon's drop-down menu. (Accepting a revision incorporates the edit into the text.)

   ▲ To reject the current revision, click the Reject icon or choose an option from the icon's drop-down menu. (Rejecting a revision removes the edit.)

   ▲ Temporarily ignore a revision by clicking the Next or Previous icon.

✔ **Tips**

■ You don't have to share a document to use change tracking. You can use it to track and manage your own edits, too.

■ Another way to view the content of edits and comments is to move the cursor over them in the body of the document. A pop-up box will appear.

■ You can close the Reviewing Pane by clicking its icon or the pane's close box.

■ Any reviewer can insert comments into the text. Comments can be used for any purpose, such as explaining the reason for an edit or pointing out material that needs to be rewritten. To insert a comment, set the insertion mark or select the text to which the comment refers, click the New Comment icon in the Comments group, and type the comment. Comments are identified by the reviewer's initials, followed by a number, such as [SS3].

CHANGE TRACKING

Comparing Documents

Whether you're working alone on an important document or with others, it can be helpful to compare two versions to see what's been changed. (This assumes, of course, that you've saved multiple versions of the document or, at least, an original and a current version.)

To compare two versions of a document:

1. On the Review tab, click the Compare icon in the Compare group and choose Compare from the drop-down menu.

   The Compare Documents dialog box appears (**Figure 7.9**).

2. Select the original and revised documents from the drop-down lists.

   If a document isn't listed, click its Browse icon to locate the document on disk.

3. If the bottom half of the dialog box is hidden, click the More button to reveal the document-comparison options.

4. Review and set options, and then click OK.

   The comparison document is created and displayed (**Figure 7.10**).

✔ Tips

- You can compare *any* two versions of the same document—not just the first and last or the previous and current versions.

- Each pane in the comparison document has its own close box.

- If a document has undergone multiple revisions, you'll find it more manageable to compare the last two versions than to compare the original and final.

- Compare Documents can also be used to compare the last saved version with an autosaved version. See Chapter 2 for more details on using Compare Documents.
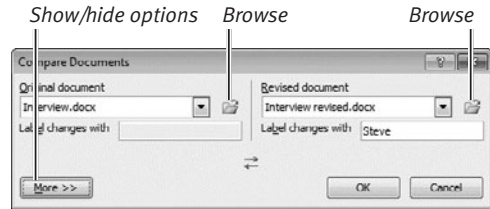
Show/hide options   Browse   Browse

Figure 7.9 Select the original and revised documents, set options, and click OK.

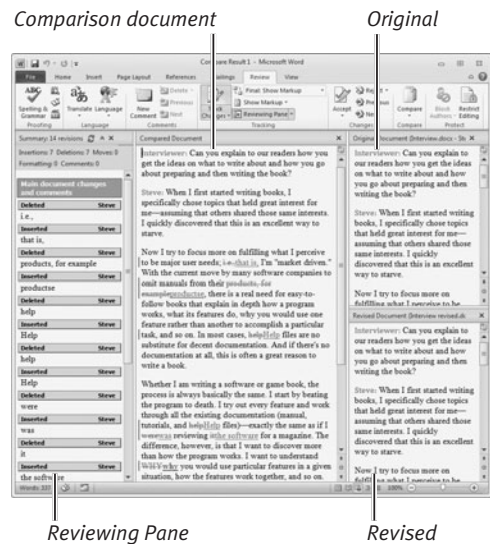Comparison document   Original

Reviewing Pane   Revised

Figure 7.10 You can customize the display by choosing commands from icon menus, such as Show Markup, Reviewing Pane, and Show Source Documents.

Other Office Sharing Tools

If you need to share your Office 2010 documents with users of earlier versions, the Document Inspector and Compatibility Checker are two very helpful utilities. Both can be found in the Info section of the Backstage, as described in Chapter 2.

In addition, the Share section of the Backstage contains a Change File Type command that you may find easier to use than choosing Save As file formats.
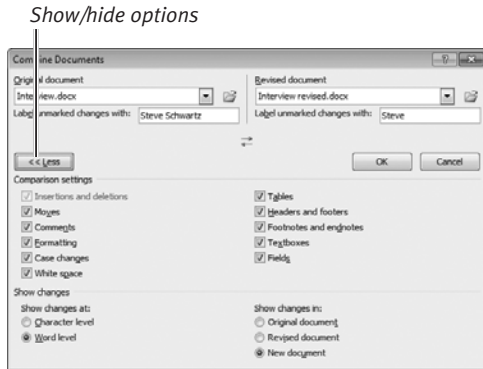
Show/hide options

Figure 7.11 Select the two documents, set options, and click OK.
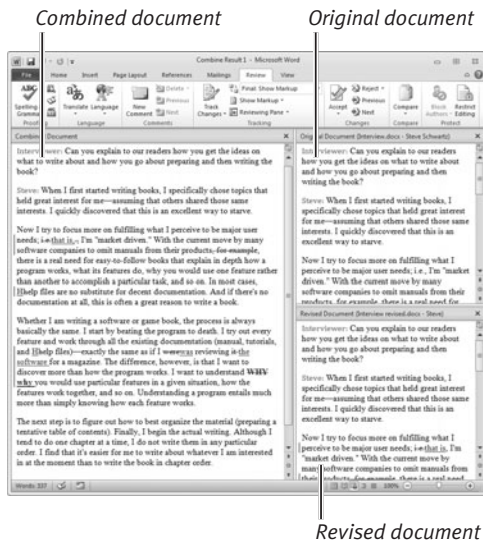
Combined document   *Original document*

Figure 7.12 The combined document appears in a new window. You can open the Reviewing Pane to process the revisions.

Revised document

✔ Tip

■ Creating a combined document does *not* save it to disk. If you'd like a permanent copy of the combined document, remember to save!

Combining Documents

If multiple reviewers are independently reviewing the same document, you can use the Combine command to merge their edits and comments (two documents at a time) into a single master document. Then the author or group leader can process the revisions, as explained previously in "Change Tracking."

To merge two documents:

1. On the Review tab, click the Compare icon in the Compare group and choose Combine from the drop-down menu.
   The Combine Documents dialog box appears (**Figure 7.11**).

2. Select the two documents from the drop-down lists.
   If a document isn't listed, click its Browse icon to locate the document.

3. If the bottom half of the dialog box is hidden, click the More button to reveal the procedure options.

4. At the bottom of the dialog box, select Show changes in: New document. Review the other options and then click OK.
   The combined document is created and displayed (**Figure 7.12**).

5. Save the combined document by clicking the File tab to go to the Backstage and then clicking Save As.

6. If more documents need to be merged with the new, combined document, repeat Steps 1–5, but specify the combined document saved in Step 5 as one of the documents.

7. *Optional:* To process the revisions, open the Reviewing Pane (see Figures 7.7 and 7.10) by clicking the Reviewing Pane icon and choosing a display option: Vertical or Horizontal.

COMBINING DOCUMENTS

Publishing Blog Entries

Another way to share written information is to publish it to a Web log (*blog*). Blog journals can be viewed in any browser. To create your own blog, you must register with a blog service provider, such as Windows Live Spaces (`http://spaces.msn.com`) or Blogger (`www.blogger.com`). Many providers host blogs without charge.

To configure Word for blog work:

1. If you haven't registered with a blog service, do so before proceeding.

2. The first time you issue a blog-related command in Word, the Register a Blog Account dialog box appears. Click Register Now.

3. In the New Blog Account dialog box (**Figure 7.13**), select your blog service from the drop-down list, and click Next.

4. In the New *service* Account dialog box (**Figure 7.14**), enter the user name and password for your blog account. Click the Remember Password check box.

5. Click the Picture Options button.
   The Picture Options dialog box appears (**Figure 7.15**).

6. Select your blog service from the Picture provider drop-down list and click OK.
   If your blog service isn't listed or your blog posts won't contain images, select None - Don't upload pictures.

7. Click OK to close the New *service* Account dialog box.

✔ Tip

■ If the Picture Options dialog box doesn't list your service, you may still be able to upload pictures to your blog. For instructions, see the blog service's Help pages.
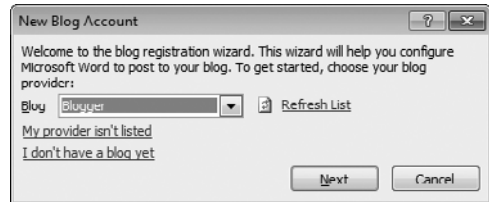

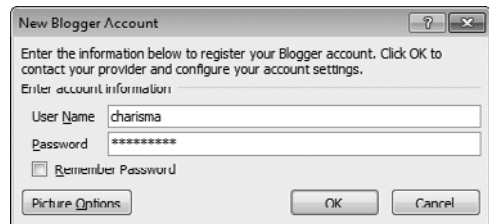**Figure 7.13** Select your blog service. Click Next.

Figure 7.14 To enable Word to transmit blog posts to your account, enter your user name and password.

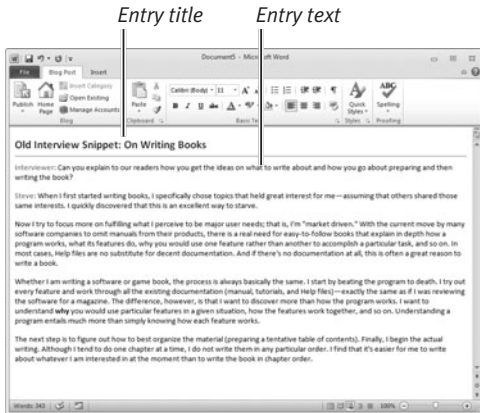**Figure 7.15** Select the blog's picture-hosting service from the drop-down list.

Entry title   Entry text

Figure 7.16 Enter a title for the entry and write the text.

Figure 7.17 Here's how the blog entry looks when viewed in a browser.
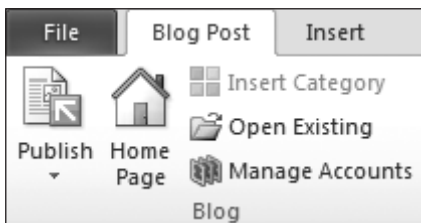

Figure 7.18 Tools for publishing posts, editing previous posts, and managing blog accounts can be found in the Blog group.

To create and publish a blog entry:

1. Click the File tab to go to the Backstage, and select New.

2. Select the Blog post icon in the Available Templates list, and then click Create.

   A blog post template appears. The Ribbon tabs and icons provide the tools to write, format, and post your blog entry.

3. Create the new blog entry by typing the entry text and replacing the title place-holder with a title (**Figure 7.16**).

4. When you're satisfied with the entry, click the Publish icon and choose Publish from the drop-down menu that appears.

   The new entry is posted to your blog (**Figure 7.17**).

5. To view your blog, click the Home Page icon in the Blog group.

✔ Tips

- You can also publish an existing Word document as a blog entry rather than starting from the template. Click the File tab, select Share, select Publish as Blog Post, and click the Publish as Blog Post button. Replace the title placeholder with a title and make any desired edits to the content. When you're satisfied with the entry, click the Publish icon and choose Publish from the drop-down menu.

- To edit a previously published blog entry, click Open Existing in the Blog group (**Figure 7.18**). In the Open Existing Post dialog box, select the entry you want to edit and click OK. Make the changes, and then publish it as you did before.

- To delete a blog post, use the tools provided by the blog service.

- To add, change, or delete blog accounts, click the Manage Accounts icon.

Publishing Blog Entries