Using Microsoft Office 2007
Advanced Word Handout

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Contents

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Advanced Microsoft Word 2007

Microsoft Word 2007 is one of the more popular programs in the Microsoft Office Suite. Microsoft has made some major changes from previous versions of the program. Word 2007 offers the tools to easily create professional documents using advanced features.

Basic and intermediate-level functions of the application were discussed in the Introduction to Microsoft Word 2007 and Intermediate Microsoft Word 2007 documents. This handout will guide readers through some of the advanced functions that Word 2007 provides, such as *Customizing Word*, *Mail Merge*, and *Tracking Changes*. Refer to the Contents page for a general overview of the topics discussed in this document.

Customizing Word 2007

As users become more experienced with Word, they will look for ways to speed up routine tasks, saving time that can be used for more productive work. They discover features that they use frequently and others rarely. They will develop preferences for what should be seen in the menus, toolbars and keyboard shortcuts. This handout explains how to customize these aspects of Word.

VIEWING FORMATTING MARKS

This allows users to view special characters known as formatting marks in a document that are normally not visible. This can be useful when the user wants to view characters such as tabs, spaces, or paragraph marks.

To view formatting marks in a document:

1. Click the **Office Button**.
2. Select Word Options in the lower right corner. The *Word Options* dialog box opens.
3. Click the **Display** button in the left column.
4. Select the formatting marks that should be visible (see Figure 1) ► **OK** button.

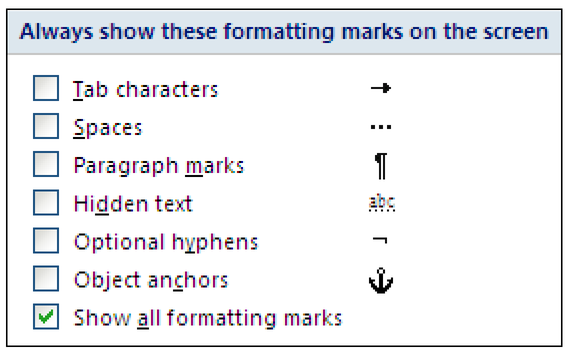


Figure 1 - Formatting Marks Options

SETTING SAVE OPTIONS

Word 2007 offers users several different options that are applied when a document is saved (see Figure 2) designate how items are saved. One feature of the save options automatically saves recovery information to help prevent data loss.

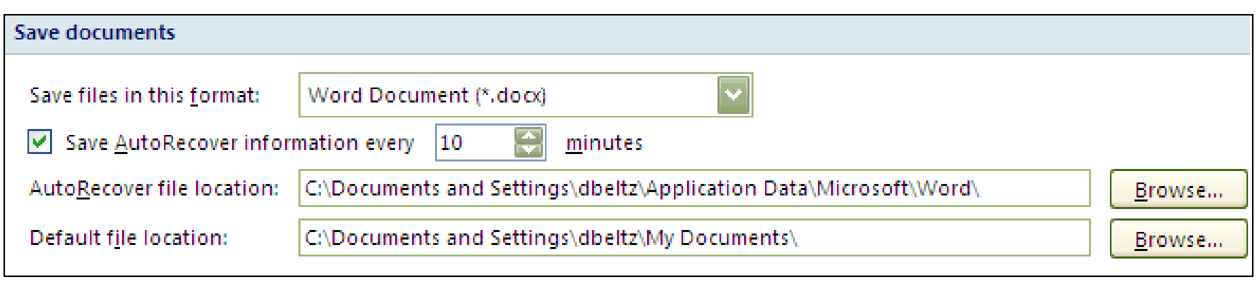


Figure 2 - Document Saving Options

Save options are accessed by opening the *Word Options* dialog box as described in the previous section and clicking the Save button in the left column.

When working on a document, it is best to save it frequently to minimize work lost in the event of a system error. A feature built into Word 2007 tells the program to automatically save work at a designated time interval (10 minutes by default). To change the time interval, use the ***Save AutoRecover info every:*** spin box. (Make sure the ***Save AutoRecover info every:*** check box is checked). The interval can be anywhere from 0 to 120 minutes. When Word 2007 reopens after a system error, the recovered file appears in the **File Recovery Task Pane**. The recovered file may contain information that would otherwise be lost.

Additionally, in this section users can designate the format that documents are automatically saved (see Figure 3 for the list of available formats). Users can also specify the location where the AutoRecover file is stored and the default location where all files are saved (see Figure 2

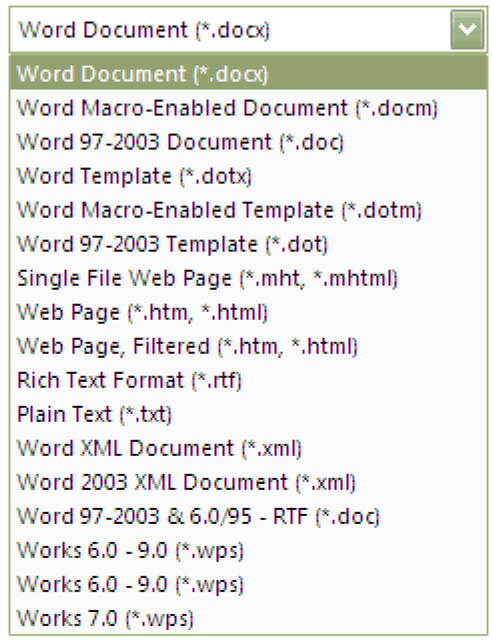


Figure 3 - Available Document Formats

NOTE: AutoRecover does not replace the need to save work periodically!

Creating Keyboard Shortcuts

Users may sometimes prefer working with the keyboard instead of choosing commands with the mouse. It is possible to add shortcuts to existing buttons, and include symbols and special characters.

NOTE: All shortcut keys begin with **[Alt]**, **[Ctrl]** or a function key **[F1, F2, F3…]**.

To assign keyboard shortcuts to existing buttons and commands:

1. Click the **Office Button** ► Word Options button. The *Word Options* dialog box opens.
2. Click the **Customize** button in the left column.
3. Click the Keyboard shortcut: Customize... button. The *Customize Keyboard* dialog box opens (see Figure 4).
4. Navigate to the category and command to which a keyboard shortcut will be assigned.
5. Click inside the ***Press new shortcut key: textbox***.
6. Press the sequence of keys that will define the new shortcut. The sequence will appear in the textbox.
7. Click the Assign button ► Close button.

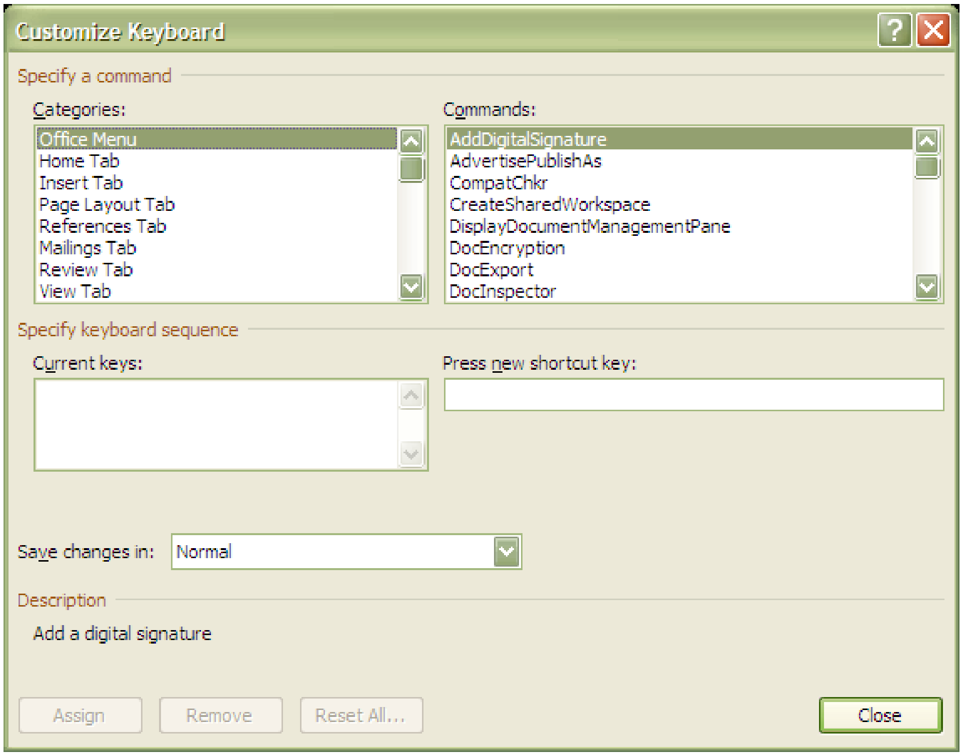


Figure 4- Customize Keyboard Dialog

Using Mail Merge

The ***Mail Merge*** function provided by Word 2007 enables the user to create letters, faxes, e-mail messages, envelopes, labels and directories once and use them many times with the data saved in a mailing list database or an address list in the ***Microsoft Outlook Contacts List***. With this feature, the user can create and send projects like a direct mail campaign to many people or organizations. It can also be used to make mailing labels to affix to catalogs or an address listing of all clients in various databases.

Using the Mail Merge Wizard

The ***Mail Merge Wizard*** provides all the basic steps to create, open and modify both the main document and the data source. Some of the terms used in the ***Mail Merge Wizard*** are described in Table 1. The **Mail Merge** task pane provides instructions for each step in the process. In addition, it is possible to go back to any previous step to review or modify the mail merge.

Table 1 – Terms about Using Mail Merge Wizard

Terms	Description
Main document	Contains the information common to all merged documents. It can be a letter, email, envelope, or label into which the data will be merged. It can conclude text, images, borders, colors, shades, tables and more.
Source file	The file from which the merge data is taken. It contains the variable information that will be inserted into the merge fields in the main document.
Merge fields	Identifiers inserted in the text that indicate to Word the position and type of data to be inserted at that point in the document.
Address block	Includes name and address information.
Greeting line	Adds the opening salutation, along with the name of the recipient selected.

To use the Mail Merge Wizard:

1. Select the *Mailings* tab on the **Ribbon**.
2. Click the ***Start Mail Merge*** drop down arrow in the ***Start Mail Merge*** group.
3. Click the **Step by Step Mail Merge Wizard** option in the drop-down menu (see Figure 5). The **Mail Merge** task pane opens (see Figure 6).
4. Select the type of document in the **Select document type** section.
5. Click the [Next: Starting document] link to advance to step 2 (see Figure 7).

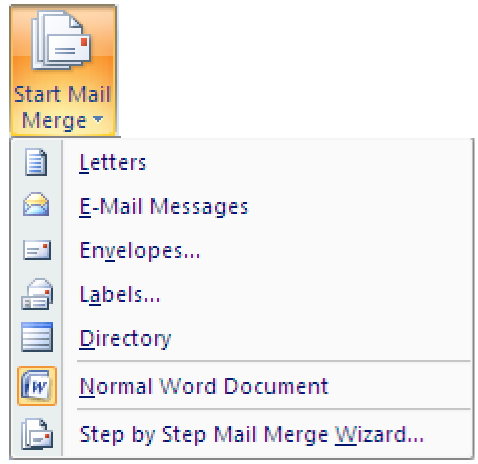


Figure 5 - Start Mail Merge Drop-Down Menu

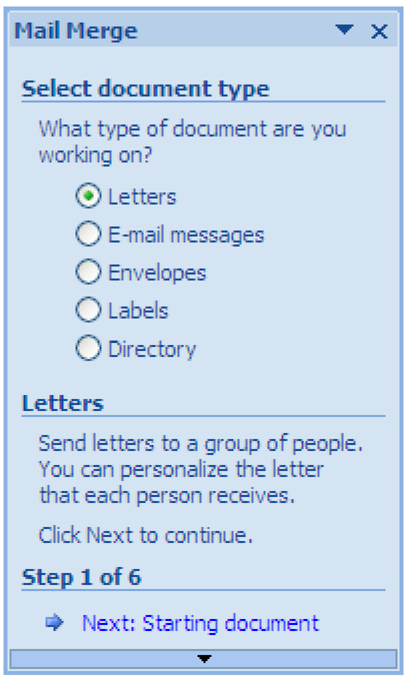


Figure 6 - Mail Merge Wizard Step 1

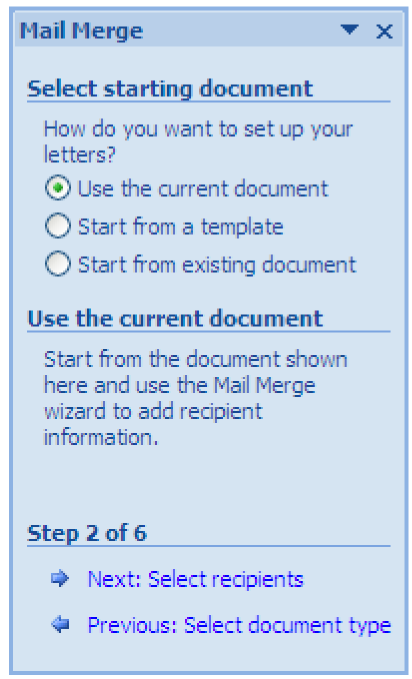


Figure 7 - Mail Merge Wizard Step 2

6. Choose the appropriate option in the **Select starting document** section (see Figure 7).
7. Click the **Next: Select recipients** link (see Figure 8). The third step of the Mail Merge process opens (see Figure 8).Word 2007 provides three options to select the recipients; two of the methods are detailed in the following sections of this handout.

Typing a New List

The ***Type a new list*** option allows users to create a new list of Mail Merge recipients.

To type a new list:

1. Click the ***Type a new list*** option button in the **Select Recipients** section of the **Mail Merge** task pane.
2. Click the [Create...] link to open the *New Address List* dialog box (see Figure 9).
3. Enter the information for the person or company.
4. After completing the record, click the **New Entry** button to add a record.

NOTE: Clicking the **Customize Columns…** button allows the user to add, delete, rename and reorder fields (see Figure 9).

5. When finished adding to the new list, click the **OK** button to close the dialog box. The *Save Address List* dialog box opens.
6. Enter a name for the file and click the **Save** button. The *Mail Merge Recipients* dialog box opens (see Figure 10). The information is displayed in the *Mail Merge Recipients* dialog box allows users to sort, rearrange and select or deselect recipients.

   NOTE: Users can edit the list by selecting the list in the *Data Source* section and clicking the **Edit** button. The *Edit Data Source* dialog box will open (it looks and functions exactly the same as the *New Address List* dialog box).

7. When finished selecting recipients, click the **OK** button.

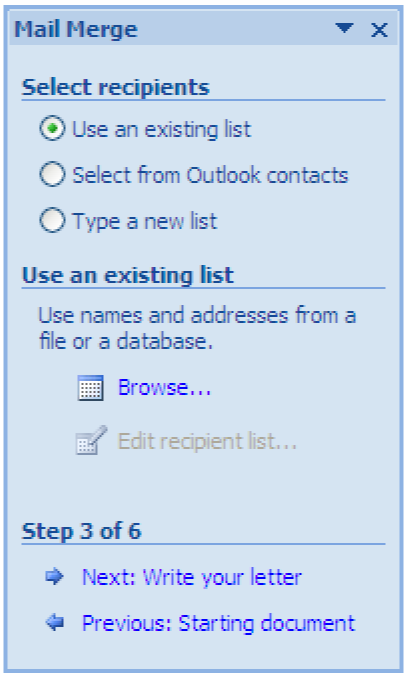


Figure 8 - Mail Merge Wizard Step 3

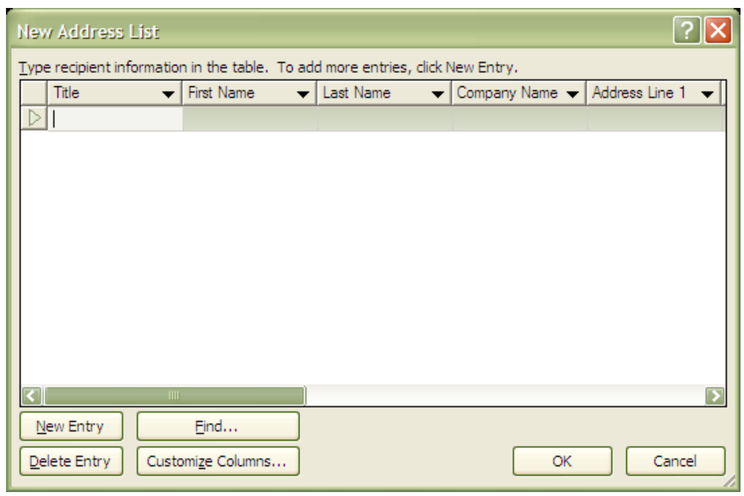


Figure 9 - New Address List Dialog Box

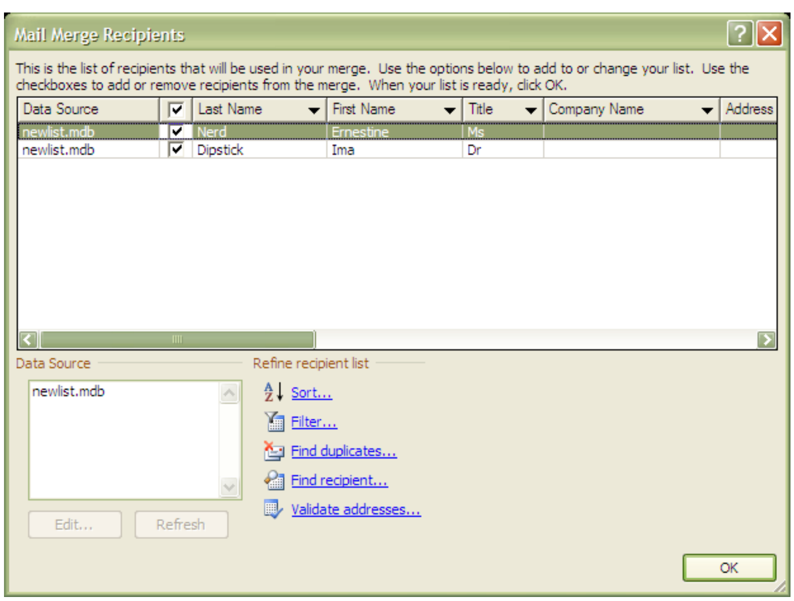


Figure 10 - Mail Merge Recipients Dialog Box

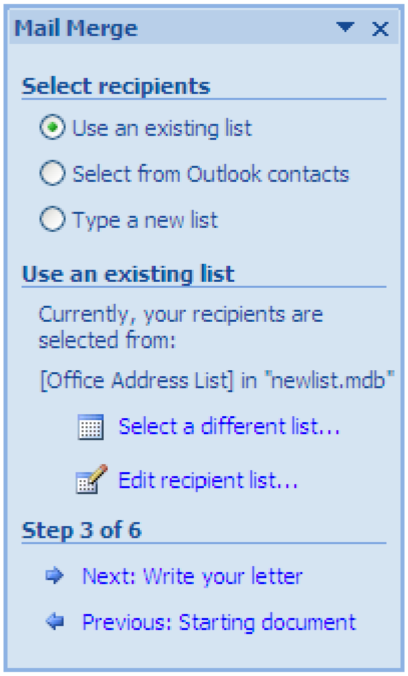


Figure 11 - Mail Merge Task Pane after Recipient List is selected

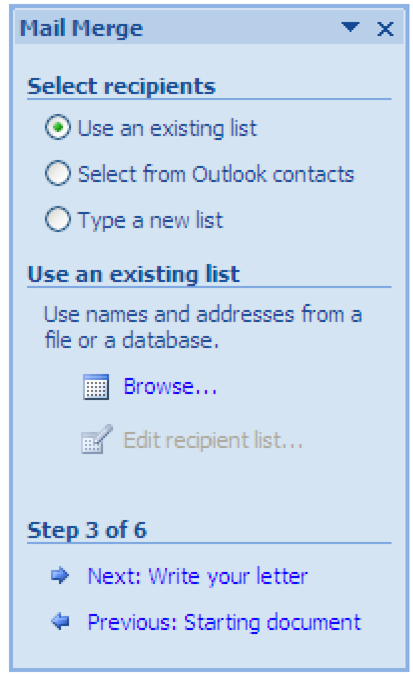


Figure 12 - Using an Existing List

Using an Existing List

Using an existing list allows the users to use an existing file as data source that contains the information to be merged into a document, for example, a Microsoft Excel worksheet or a Microsoft Access database.

To use an existing list:

1. Select the ***Use an existing list*** option button in the **Select recipients** section of the task pane (see Figure 12). Select the Browse... link on the task pane. The *Select Data Source* dialog box opens.
2. Navigate to where the list is stored, select the data list and open the file. The *Mail Merge Recipients* dialog box opens (see Figure 10).

NOTE: If a data source is opened that contains multiple tables (such as a database file), the *Select Table* dialog box will open first. After selecting a table, the *Mail Merge Recipients* dialog box will open.

3. Select the recipients by checking the check box next to their name. When finished, click the **OK** button.

INSERTING MERGE FIELDS INTO A DOCUMENT

Once the document and the recipients have been selected, the next step involves adding the placeholders in the document where the data will be inserted for individual recipients.

To add Merge Fields:

1. Click the Next: Write your letter link to
2. Position the insertion point to the desired location of the first merge field in the document.
3. In the **Write your letter** section of the task pane (see Figure 13), click the necessary link to complete the letter.

Table 2 describes the different types of fields that can be inserted into a document.

Table 2 - Merge Fields that can be inserted in the document (Wizard step 4)

Fields	Description
Address Block	Displays the *Insert Address Block* dialog box so that the user can add name, address and city, state and ZIP code at the insertion point.
Greeting Line	Displays the *Greeting Line* dialog box that allows the user to select the salutation to be used as well as the format for the recipient name.
Electronic Postage	Enables the user to work with electronic postage if that feature is installed.
More Items	Displays the *Insert Merge Field* dialog box, giving the user the option of adding additional fields to the main document.

<u>NOTE</u>: Clicking the link for an item will open its corresponding dialog box (see Figure 14, Figure 15, and Figure 16), from which the desired formats and options can be selected.

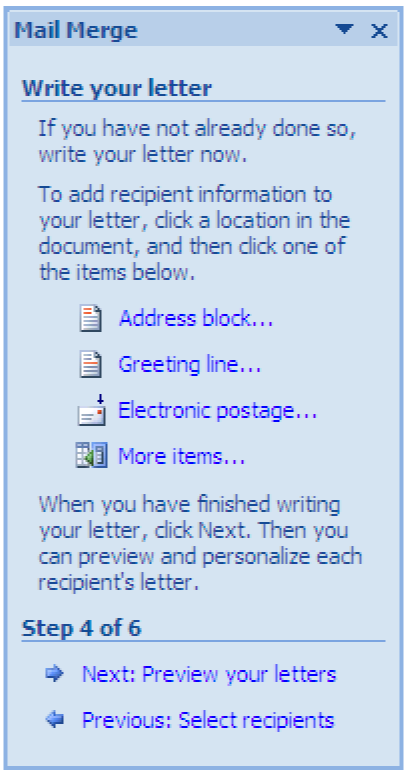


Figure 13 - Mail Merge Wizard Step 4

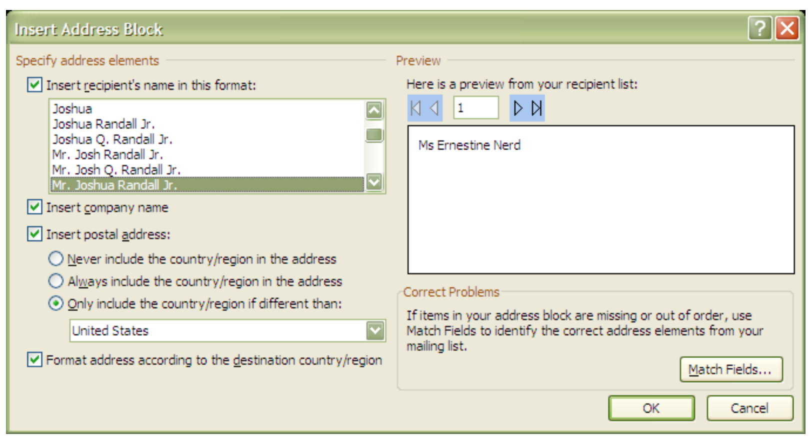


Figure 14 – Insert Address Block Dialog Box

4. If the common items do not meet the needs of the user, click the **More items...** link. The *Insert Merge Field* dialog box opens (see Figure 16) and all the fields in the list will be available for use.
5. Select the field(s) to insert and click the **Insert** button ► **Close** button.

<u>NOTE</u>: Users can also open the dialog boxes by clicking the appropriate button in the ***Write & Insert Fields*** group on the *Mailings* tab of the **Ribbon**. When inserted, a merge field is enclosed in chevrons (e.g., «First_Name» «Last_Name»).

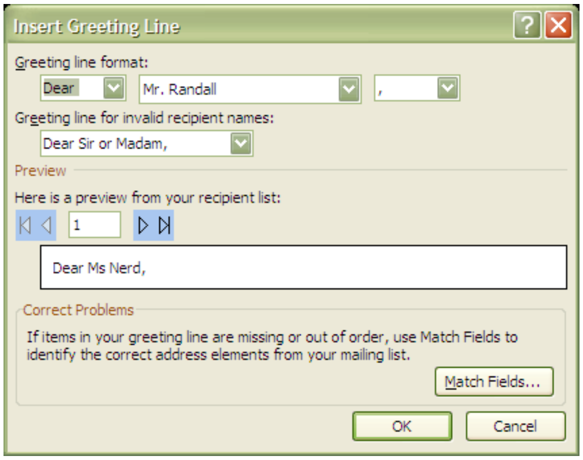


Figure 15 - Insert Greeting Line Dialog Box

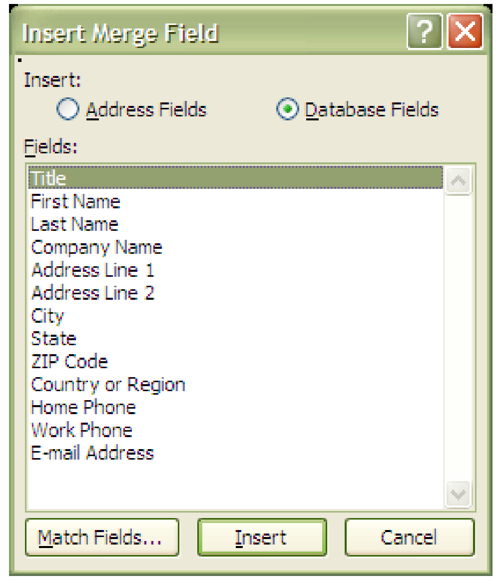


Figure 16 - Insert Merge Field Dialog Box

PREVIEWING MERGED DATA

Before actually performing the mail merge, preview the merged document and check for formatting and spelling errors. If an error is found in the main document, correct it. Also, correct it in the data source if there will be another merge.

Once the letter is formatted to the desired specifications, click the Next: Preview your letters link at the bottom of the task pane to go to the Step 5 of ***Mail Merge Wizard*** (see Figure 17).

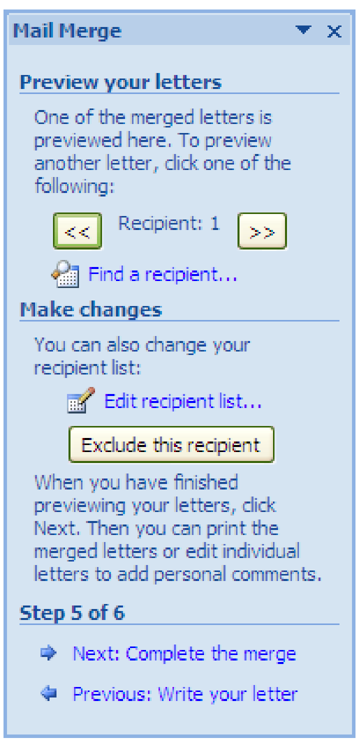


Figure 17 - Mail Merge Wizard Step 5

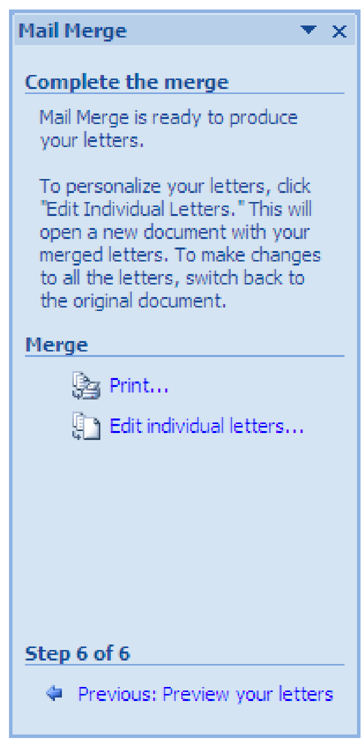


Figure 18 - Mail Merge Wizard Step 6

To preview merged data using the controls in the task pane:

1. Click the F**orward** arrow >> to preview the next merged records.
2. Click the **Back** arrow << to preview the previous records.

NOTE: Once the merge has been completed, the user can navigate through all of the recipients to view their copy of the document. Use the **Next Record** ▶ or **Previous Record** ◀ buttons on the **Mail Merge** toolbar to preview merged records.

To locate a particular recipient in a list click the Find a recipient... link on the ***Mail Merge*** Wizard. Click Exclude this recipient button in the **Make changes** section of the task pane to remove a recipient from the current merge operation.

The merge can be evaluated for errors by clicking the Auto Check for Errors button in the ***Preview Results*** group on the *Mailings* tab of the **Ribbon**. The *Checking and Reporting Errors* dialog box will open (see Figure 19) and the user should select the necessary option button ► **OK** button.

NOTE: The second option, which is the default, performs the merge but alerts the user immediately whenever an error is found. This is the recommended option for first-time users.

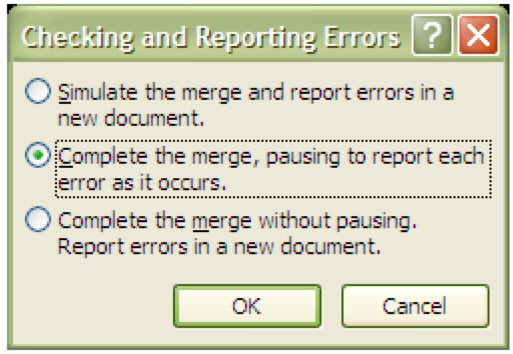


Figure 19 - Checking and Reporting Errors Dialog Box

MERGING TO A NEW DOCUMENT

The final step in the mail merge process involves printing, sending or saving the document with the merge data intact. Click the Next: Complete the merge link in the task pane to advance to the final step of the merge (see Figure 18). Users can also click the ***Finish & Merge*** drop-down arrow in the ***Finish*** group on the *Mailings* tab of the **Ribbon** (see Figure 20).

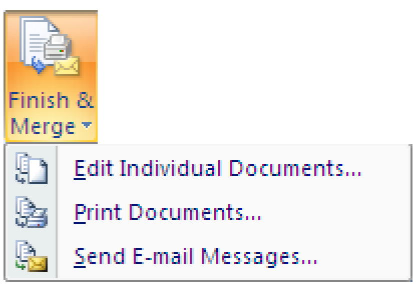


Figure 20 - Finish & Merge Drop-Down Menu

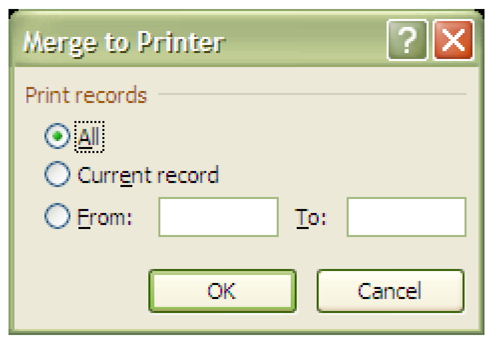


Figure 21 - Merge to Printer Dialog Box

NOTE: Selecting the Edit individual letters... link in the **Mail Merge** task pane automatically sends the merged letters to a new document so that changes can be made to individual letters. Changes made to individual letters in the merged document will not be saved back to the main document or to the data source. Once the changes have been made, save the merged document or send the letters to the printer.

To select merge print options:

1. Click Print... link on the **Mail Merge** task pane or select Print Documents... from the ***Finish & Merge*** drop-down menu. The *Merge to Printer* dialog box opens (see Figure 21).
2. In the *Print records* section, select a desired option. The ***All*** option will print all records in the current document, the ***Current Record*** option will print only the displayed record, and the ***From:*** and ***To:*** option will specify a page range in the document ► **OK** button.

To merge to a new document select the Edit individual letters... link. The *Merge to New Document* dialog box opens (see Figure 22). In the *Merge to New Document* dialog box (see Figure 22), select the records to merge then click the **OK** button.

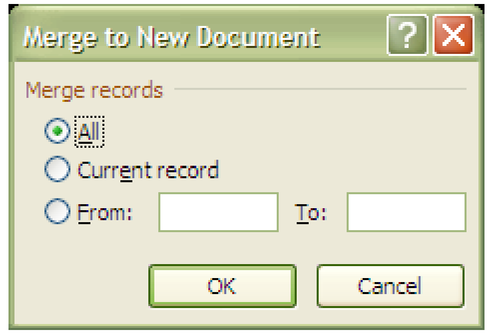


Figure 22 - Merge to New Document Dialog Box

To merge to E-mail:

1. Select the Send E-mail Messages... from the ***Finish & Merge*** drop-down arrow in the ***Finish*** group on the *Mailings* tab of the **Ribbon** (see Figure 20). The *Merge to E-mail* dialog box opens (see Figure 23). This type of merge process involves putting the source data together with the main document in e-mail messages.
2. Click the ***To:*** down arrow to display the choices for the field containing the e-mail address to which the messages will be sent.

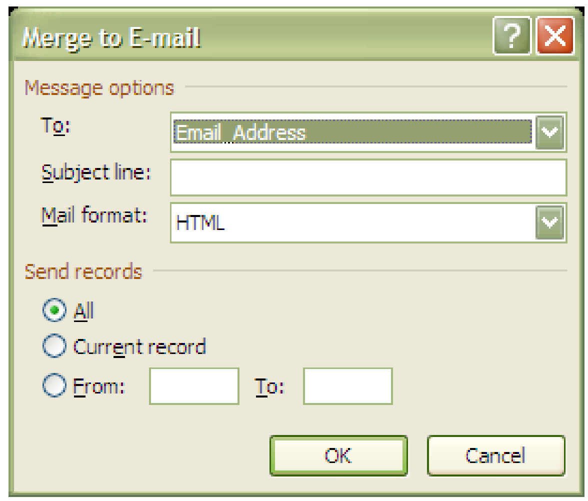


Figure 23 - Merge to E-mail Dialog Box

3. Enter a subject in the ***Subject line:*** textbox to tell recipients something about the incoming message.
4. In the ***Mail format:*** drop-down list, select the ***Attachment***, ***HTML*** or ***Plain Text*** option to control the format of the e-mail messages.
5. In the *Send records* section, select the records to send ► **OK** button.

Tracking Changes

Many finished documents reflect the ideas, contributions and alterations from not only a single person, but instead, a group of people. A single document may be composed by one writer, modified by an editor, commented on by a technical reviewer and inspected and approved by a project manager. In Word 2007, numerous people can review the same document and incorporate their changes and comments with the changes and comments from other people. This section will demonstrate some of the markup features and reviewing options in Word 2007 that will assist collaboration efforts when working with others on documents.

MARKUP TOOLS

The track changes feature records editing changes made to a document including deletions, added text, and formatting. Word 2007 can monitor changes from multiple reviewers and the changes can later be evaluated, accepted or rejected on a case-by-case or global basis. Most of the main collaboration features can be accessed from the groups on ***Review*** tab of the **Ribbon** (see Figure 24). Table 3 describes some of the buttons found on the ***Review*** tab.

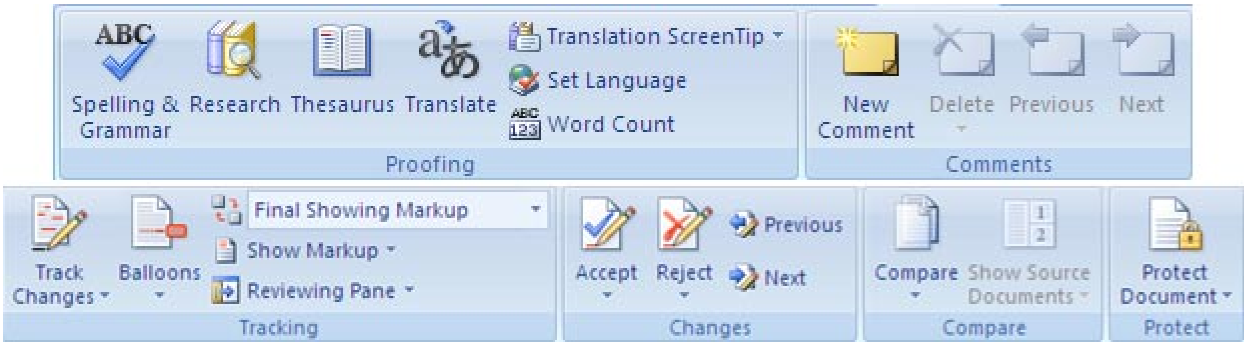
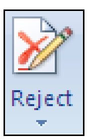
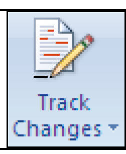


Figure 24 - Groups in the Reviewing Tab on the Ribbon

Table 3 – Description of Select Tools on the Review tab of the Ribbon

Button	**Name**	**Description**
	Display for Review	Controls how Word displays changes and comments in the current document.
	Show	Accesses a drop-down menu that enables the user to configure the display and option settings for comments, reviewers and tracked changes.
	Previous	Jumps to the previous tracked change or comment in the current document relative to the insertion point.
	Next	Jumps to the next tracked change or comment in the current document relative to the insertion point.
	Accept	Accepts a selected tracked change in the current document or enables all changes to be accepted at once.
	Reject	Rejects a selected change, deletes a selected comment and returns the text to its original state or enables the reader to reject all changes or delete all comments at once.
	New Comment	Inserts a new comment. Clicking the down arrow allows editions to be made, delete comments, or record a voice comment. It is shown in the reviewing pane or in a margin balloon.
	Track Changes	Controls whether the Track Changes feature is turned off or on.
	Reviewing Pane	Shows or hides the reviewing pane, which displays the complete text of tracked changes and comments.

Managing Comments

The use of comments enables reviewers to annotate a document with suggestions and queries without changing the document. Comments will display differently depending on the display mode the document is in. The display mode is changed by using the ***Display for Review*** drop-down list (see Table 3). If the ***Display for Review*** drop-down list is set to ***Original*** or ***Final***, then comments will be displayed in the **Reviewing Pane**. If the ***Display for Review*** drop-down list is set to ***Original Showing Markup*** or ***Final Showing Markup***, then comments will be displayed in an expanded right margin of the document.

Configuring User Names for Reviewing

When working in a group, each person collaborating on the document must properly configure their user name so that the reviewers will know who made each comment. Before inserting comments, the user needs to tell Word 2007 how to identify the created comments.

To set user name information:

1. Click the **Office Button** and open the *Word Options* dialog box.
2. Make sure the Popular options are selected.
3. Change the name and initials in the Personalize your copy of Microsoft Office section (see Figure 25).

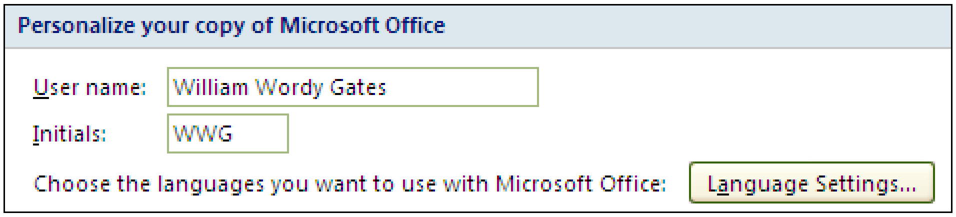


Figure 25 – Word Options Dialog Box (User Information)

NOTE: If using someone else's computer to review a document, it is possible to change the name on the *Word Options* dialog box before beginning work without affecting existing documents. When finished, reconfigure the user information to the original information.

Managing Reviewers in a Document

By default, Word 2007 automatically uses a different color to identify the comments of each reviewer and tracked changes in a document. If viewing a document that is color-coded for a number of reviewers, the user can quickly see which colors are currently assigned to which reviewers.

To view reviewer color codes:

1. Click the Show Markup drop-down arrow on the ***Tracking*** group ► Reviewers. The list of reviewer names and their associated colors check will be displayed (see Figure 26).
2. Select or deselect the check boxes next to the name of a reviewer to specify whether comments and tracked changes are from that reviewer are displayed in the current document.

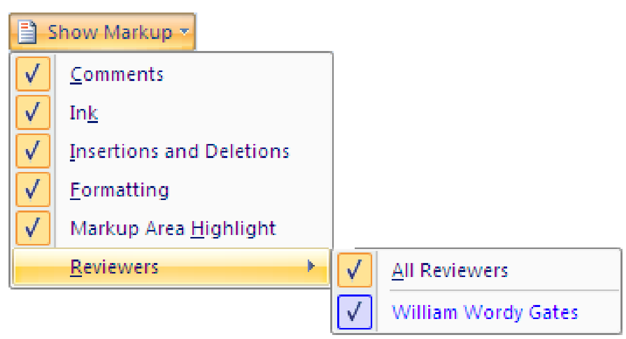


Figure 26 – Submenu of Reviewers

Inserting Standard Comments

Comments can be inserted into the document as text comments, voice comments, and handwritten comments.

To insert a comment:

1. Position the insertion point for the comment.
2. Select the *Review* tab on the **Ribbon**.
3. Click the **New Comment** button in the ***Comments*** group (see Figure 24). A new comment will open in ***Markup Area*** (an expanded right margin) of the document and the specific location of the comment in the line will be highlighted (see Figure 27).

Figure 27 - New Comment Balloon

4. Type the comment text in the comment balloon, and then click outside of the balloon or reviewing pane to complete the comment.

<u>NOTE</u>: It is possible to change a comment after creating it, by clicking inside the comment balloon and editing the text.

Showing and Hiding Balloons

If the user prefers to work with the reviewing pane instead of the balloons, the balloons can be turned off.

To turn the balloons off:

1. Select the *Reviewing* tab on the **Ribbon**.
2. Click the ***Track Changes*** drop-down arrow in the ***Tracking*** group (see Figure 24).
3. Select the Change Tracking Options... from the drop-down menu (see Figure 28). The ***Track Changes Options*** dialog box will open.
4. Click the Use Balloons (Print and Web Layout): drop-down arrow in the *Balloons* section.
5. Select the "***Never***" option ► **OK** button.

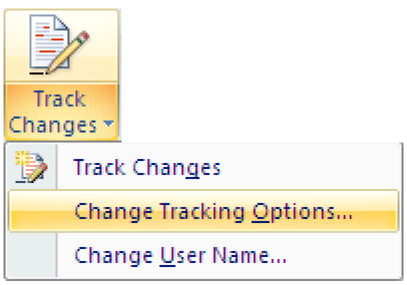


Figure 28 - Track Changes Drop-Down Menu

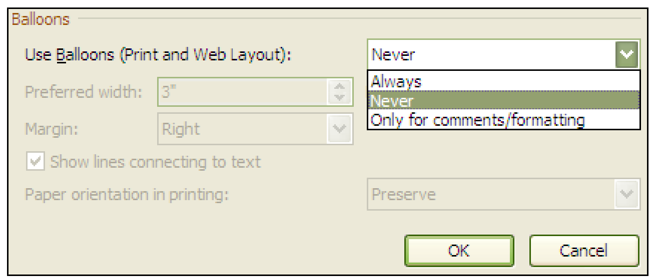


Figure 29 - Balloons Section of Track Changes Options Dialog Box

<u>NOTE</u>: If the balloons are hidden, the comment marker will show up in the text where the comment was inserted (see Figure 30). The full content of a comment can be displayed as a ***ScreenTip*** when the mouse is positioned over the comment marker and (see Figure 30 and Figure 31).

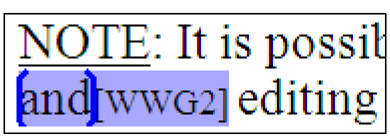


Figure 30 - Comment Marker When Balloons are Turned Off

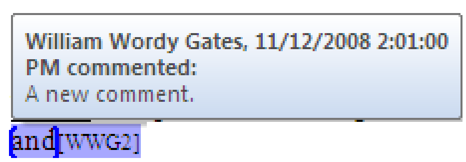


Figure 31 - ScreenTip Displaying a Comment When Balloons are Turned Off

Reviewing Comments

When reviewing comments that have been inserted into the document, it is possible to review the comments only, without displaying tracked changes.

To display comments only:

1. Select the *Review* tab on the **Ribbon**.
2. In the ***Tracking*** group, make sure that either ***Final Showing Markup*** or ***Original Showing Markup*** is selected in the ***Display for Review*** drop-down list box.

3. Click the Show Markup drop down arrow in the ***Tracking*** group and make sure that the Comments option is the only item selected in the drop-down menu.

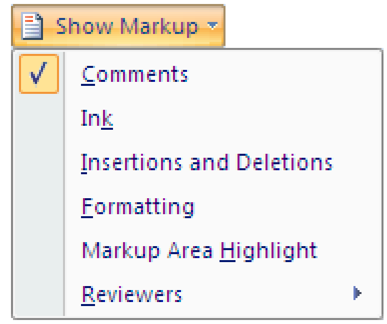


Figure 32 - Show Markup Drop-Down Menu

Deleting Comments

When reviewing a document, some comments may need to be deleted. Comments can be deleted all at the same time, or individually reviewer.

To delete a single comment:

1. Right click a comment balloon.
2. Select the Delete Comment command.

Or

1. Select a comment balloon.
2. Click the Delete button in the ***Comments*** group

To delete all comments in the document:

1. Select a comment balloon.
2. Click the Delete drop-down arrow in the ***Comments*** group.
3. Select the Delete All Comments in Document option.

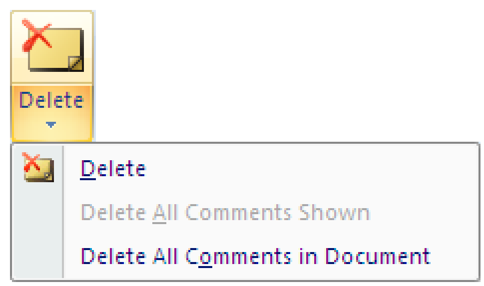


Figure 33 - Comment Delete Drop-Down Arrow

Inserting Voice Comments

Besides adding standard comments, users can include voice comments within documents. To create voice comments, the computer must have a sound card and a microphone. Likewise, others who review the document and listen to voice comments must be using a computer equipped with a sound card and speakers or headphones. Before voice comments can be used, the **Quick Access Toolbar** must be customized as described in the *Intermediate Word Handout*.

NOTE: The **Voice Comment** button that is placed on the **Quick Access Toolbar** can be found in the Commands Not in the Ribbon list that is accessed from the Choose commands from: drop-down menu in the *Word Options* dialog box.

To create a voice comment:

1. Select the insertion point where the comment will be placed
2. Click the **Insert Sound Object** button on the **Quick Access Toolbar**. The *Sound Object in Advance…* dialog box opens (see Figure 34).
3. Click the red **Record** button and then speak into the microphone to record comments.
4. Click the **Stop** button when finished and close the sound recorder.

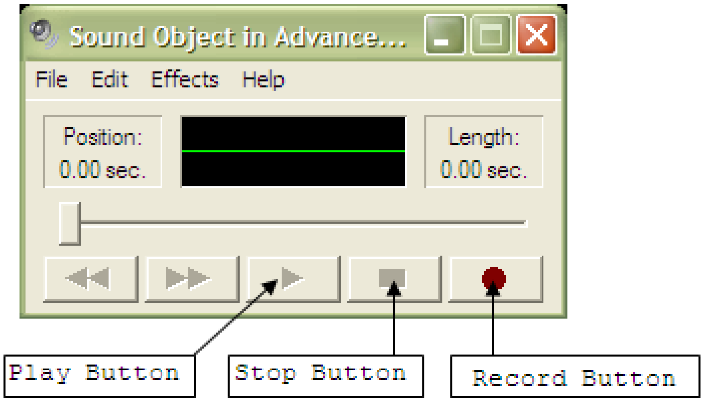


Figure 34 - Sound Object in Advance Dialog Box

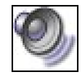


Figure 35 - Voice Comment Icon

A ***Voice Comment*** icon (see Figure 35) will be placed at the insertion point. To play the voice comment, right-click the icon and select Sound Recorder Document Object ▶ Play.

TRACKING CHANGES

When the ***Track Changes*** feature is turned on, Word 2007 records the deletions, insertions and formatting changes made by each reviewer who modifies the document. Track changes can be enabled or disabled by

- Right-click the **Word Status Bar** and make sure the Track Changes option is checked, and then click the Track Changes: Off button on the **Word Status Bar** (see Figure 36).

Or

- Press the **[Ctrl + Shift + E]** key combination.

Or

- By clicking the **Track Changes** button on the *Review* tab of the **Ribbon**.

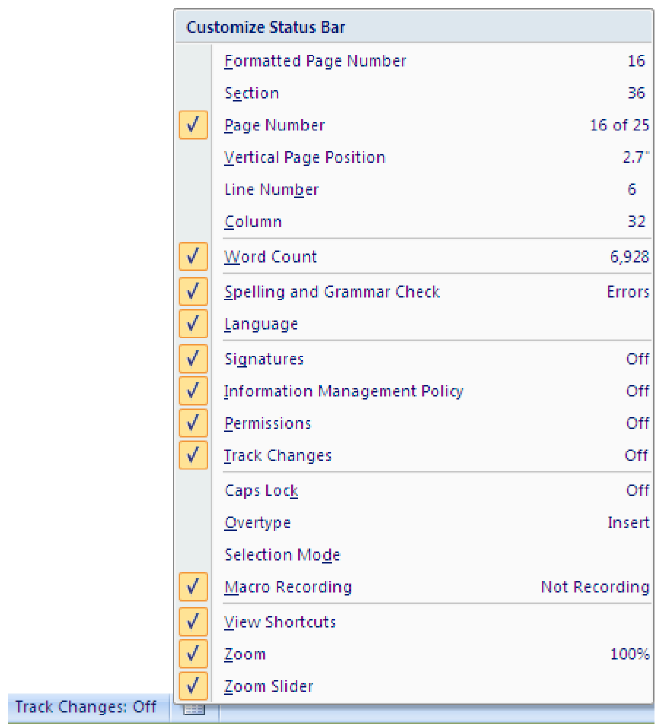


Figure 36 - Customize Status Bar Menu

Word 2007 marks tracked changes in a document as described in Table 4.

Table 4 – Tracked Changes Description

Tracked Changes	Description
Added text	Appears in the reviewer’s color with underlining.
Deleted text	Remains visible, but is displayed in the reviewer’s color with a strikethrough line indicating the deletion.
Text added and then deleted by the reviewer	Is displayed as if the text was never added.

When working with a document that has been modified by a reviewer(s), use the ***Display for Review*** drop-down list on the ***Review*** tab of the **Ribbon** to display the changed document in four views (see Table 5).

Table 5 – Views Description

Views	Description
Final Showing Markup	Shows deleted text in the balloons and displays inserted text and formatting changes in the line.
Final	Shows how the document would appear if you accepted all changes.
Original Showing Markup	Shows the inserted text and formatting changes in balloons and shows deleted text in line with strikethrough lines.
Original	Shows the original, unchanged document so that you can see how the document would look if you rejected all the changes.

Comparing and Combining Documents

The user can compare different versions of the same document and then decide which changes need to be kept. If several drafts of the same document have been created, the user may want to compare the differences. It is also possible to compare changes made to the same document by different people.

Combining incorporates all changes made to the various versions or copies of the original document into one document so that all the changes can be reviewed in one place. The user can select one of three options when combining documents: the changes can be shown in the original document, they can be shown in the revised document, or a new document can be created that will show the changes. These options are selected in the Show changes in: section of the *Combine Documents* dialog box (see Figure 37).

The *Compare Documents* and *Combine Documents* are the same (see Figure 37) except for the functions they perform. To access them, click the Compare drop-down arrow on the *Review* tab of the **Ribbon** and select either Compare... or Combine.... The different comparison options can be set in the Comparison settings section of each dialog box.

NOTE: If the documents all have the same file name, they must be stored in different locations so that none of them will be overwritten.

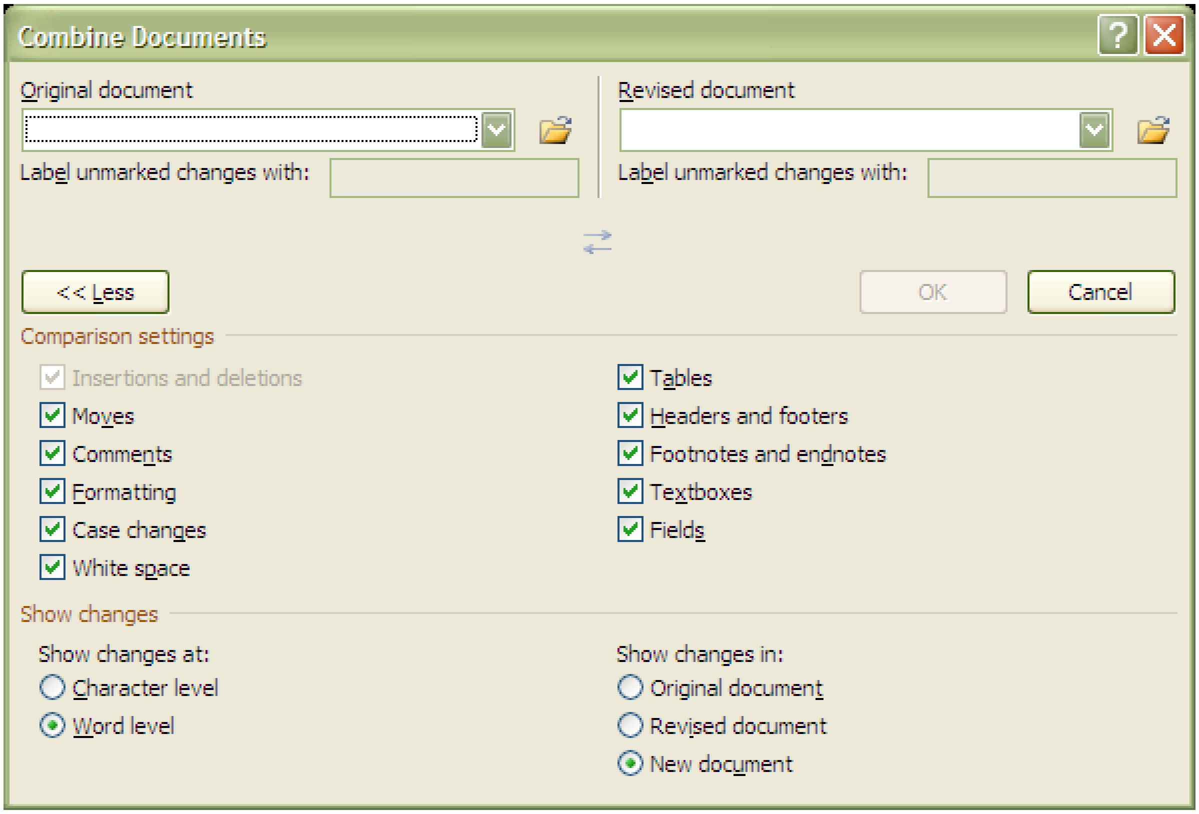


Figure 37 - Combine Documents Dialog Box

Accepting and Rejecting Proposed Edits

After a document containing tracked changes has been reviewed, the user can incorporate the edits by accepting or rejecting the changes. When incorporating edits, the user can address each edit on a case-by-case basis or accept multiple changes at one time.

<u>NOTE</u>: Before starting to accept and reject tracked changes and comments, consider saving a version of the document with all the tracked changes and comments intact. If users want to return to the originally marked-up version of the document there will be a back-up copy.

Addressing Tracked Changes One at a Time

After the changes to work with are displayed, the user can move from tracked change to tracked change using the Next and Previous buttons (see Table 3) on the *Reviewing* tab of the **Ribbon**. It is possible to jump from comment to comment as well.

A tracked change can be managed in either of the following ways:

- Right-click on a change (in the document body, in the reviewing pane, or in a balloon) and accept or reject the change.
- Click on a change and click the **Accept** or **Reject** button (see Table 3) in the *Reviewing* tab of the **Ribbon**.

After a change is accepted or rejected, Word 2007 displays the revised text as standard text.

Accepting and Rejecting All Tracked Changes at Once

At times, the user might want to accept or reject all changes in a document by executing a single command.

To accept or reject tracked changes:

1. Click either the **Accept** or **Reject** drop-down arrow on the *Reviewing* tab of the **Ribbon**.
2. Select the appropriate command from the drop-down menu (see Figure 38 and Figure 39).

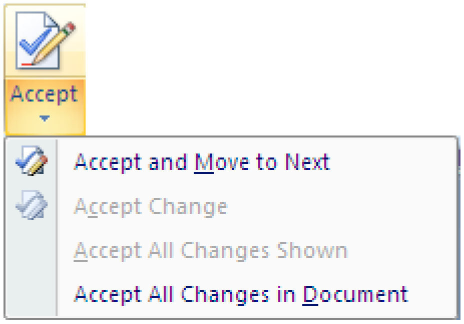


Figure 38 - Accept Change Drop-Down Menu

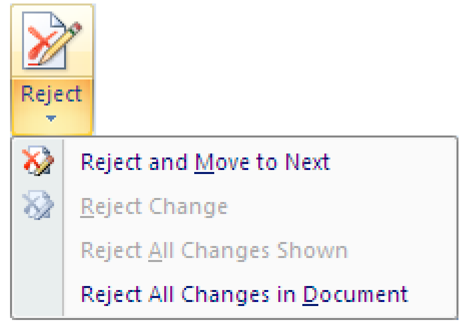


Figure 39 – Reject Change Drop-Down Menu

3. Select the **Accept All Changes in Document** or **Reject All Changes in Document** option.

Creating and Working with Macros

A macro automatically executes a series of previously recorded and saved commands. Users can create macros for repetitious tasks that are performed frequently using the same sequence of key strokes. Since a macro can be played with relatively few steps, macros can save time, especially when the task involves a large number of steps. When macros have to perform a series of repetitive steps, users can be assured that the task is performed in exactly the same way each time. Macros ensure consistency and accuracy.

Macros are typically created to perform the following tasks:

- Automate a complex series of steps.
- Combine multiple commands (such as formatting and inserting tables with a single command).
- Accessing menu commands and submenu commands quicker.
- Speed up editing.
- Formatting procedures.

Recording a Macro

The macro recorder in Word 2007 acts like a tape recorder. When a macro is recorded, it is possible to use the mouse to click commands and options, but not to select text. The user must use the keyboard to record those actions. For example, the user can use **[F8]** to select the beginning of the text to select, and then press **[End]** to move the cursor to the end of the line.

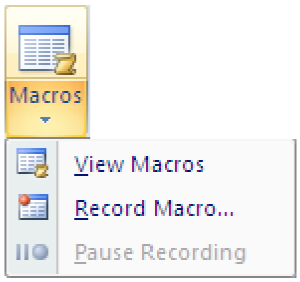


Figure 40 - Macros Drop-Down Menu

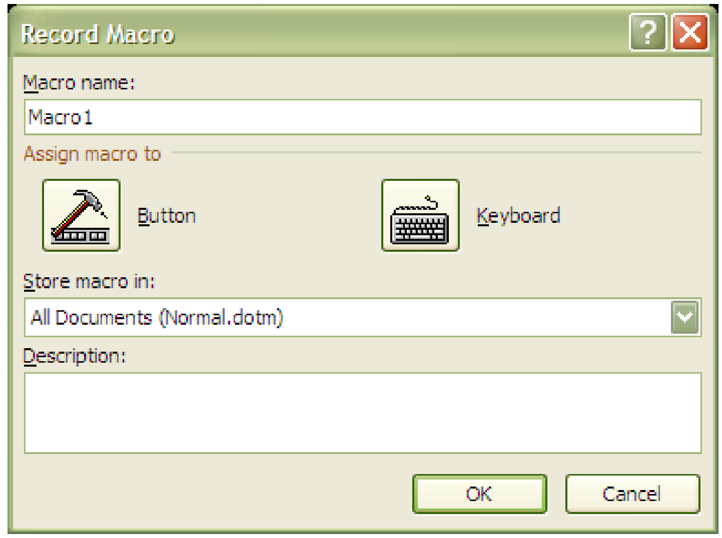


Figure 41 - Record Macro Dialog Box

Before recording a macro, plan the steps and commands for the macro to perform. If the user makes a mistake when recording the macro, corrections made will also be recorded. The user can edit the macro later to remove unnecessary steps that were recorded.

To record a macro:

1. Select the *View* tab on the **Ribbon**.
2. Click the ***Macros*** drop-down arrow in the ***Macros*** group (see Figure 40).
3. Select the Record Macro... option. The *Record Macro* dialog box opens (see Figure 41).

NOTE: The macro name must begin with a letter; it can contain numbers; it can contain up to 80 letters and numbers. The macro name cannot contain spaces or symbols. Use of Underscore "_" character to separate words is permitted.

4. In the ***Store macro in:*** list, make sure that the drop-down list displays the template or document in which to create the macro, e.g. ***All Documents (Normal.dotm)***.
5. Review the text in the ***Description:*** textbox. By default, Word 2007 provides the date and author of a macro in the ***Description:*** box.
6. Click the **OK** button. The *Record Macro* dialog box closes and the cursor shape changes.

NOTE: The macro is available only when the document or template in which it is stored is open. Macros are normally stored in the Normal template, which means that the macros can be run at any time. The locations macros can be stored at are listed in Table 6.

Table 6 – Locations for Storing Macros

Location	**Description**
Active document	If the macro is to be used in a single document, the macro can be stored directly in the document. When this option is selected, the macro will run only when the document is the active document.
All documents (Normal.dotm)	A macro can be stored in the "***Normal***" template, thereby making the macro available to all open files. By default, Word stores macros created in the "***Normal***" template.
Template	A macro can be stored in a template other than the "***Normal***" template if a template is attached to the current document or opened when the macro is created. When this is done, the macro is available only when the template is opened or attached to the active document.

7. Perform the sequence of steps.

NOTE: If the user needs to perform steps that should not be included in the macro, recording can be paused by clicking the Macros drop-down arrow and selecting the Pause Recording option (see Figure 42).

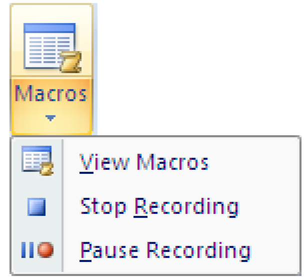


Figure 42 - Macros Drop-Down Menu (while Recording)

8. When the sequence of steps has been recorded, click the ***Macros*** drop-down menu and select the Stop Recording option (see Figure 42).

Running a Macro

When a macro is run, it executes each of the recorded steps in the order that they were recorded. Regardless of the document that was open when the macro was created, the macro can run in any document, as long as it is stored in the Normal template.

To run a macro:

1. Select the *View* tab on the **Ribbon**.
2. Click the ***Macros*** drop-down arrow.
3. Select the View Macros option. The *Macros* dialog box opens (see Figure 43).
4. Select the macro in the Macro name: list box.
5. Click the **Run** button. The macro will run and the *Macros* dialog box will close.

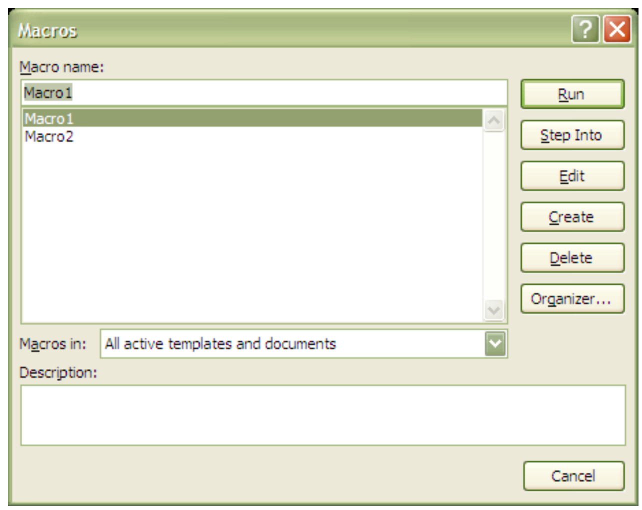


Figure 43 - Macros Dialog Box

Editing a Macro

The user can edit a macro, either to correct a mistake or to change a procedure in it. To make extensive modifications to procedures, however, the user must be skilled in using Visual Basic programming language. Macros can be edited by performing the same steps to run the macro (as described in the previous section) but instead of clicking the **Run** button, click the **Edit** button. The macro will open in the Visual Basic editing window.

Adding the Macro Drop-Down Menu to the Quick Access Toolbar

The **Macros** drop-down menu can be placed on the **Quick Access Toolbar** for quicker user access. The **Quick Access Toolbar** must be customized as described in the *Intermediate Word Handout*.

NOTE: The ***Macros*** drop-down menu that is placed on the **Quick Access Toolbar** can be found in the View Tab list that is accessed from the Choose commands from: drop-down menu in the *Word Options* dialog box.

DELETING A MACRO

A macro can be deleted if it is no longer in use. Deleting a macro removes it from the Macro name: list box in the *Macros* dialog box. Macros are deleted by performing the same sequence of steps in the `Running a Macro` section of this document, but instead of clicking the **Run** button, click the **Delete** button and then click the **Yes** button on the warning message box.

Managing Document Properties

Document properties are the information attached to a workbook to summarize its purpose or to help users locate it. Usually this information can be found in the *Properties* dialog box or the **Document Information Panel**, which contains fixed and modifiable information. Fixed information includes statistics such as the size of the document, the date the document was created, modified, date last accessed and the name of the last person who saved the document.

Document properties can be viewed and modified by opening the **Document Information Panel** (see Figure 44) beneath the **Ribbon** and, if necessary, the *Properties* dialog box (see Figure 45). Partial properties can also be displayed using the ***Properties*** view in the *Open* dialog box of a closed document (see Figure 46).

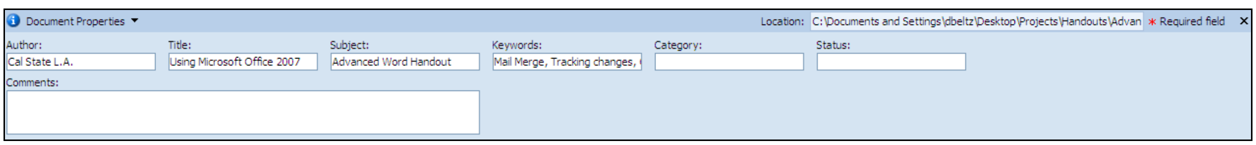


Figure 44 - Document Information Panel

To view the Document Information Panel:

1. Click the **Office Button**.
2. Select the **Prepare** option.
3. Select the Properties option.

To open the Properties dialog box:

1. With the **Document Information Panel** open, click the Document Properties drop-down arrow.
2. Click the Advanced Properties... option

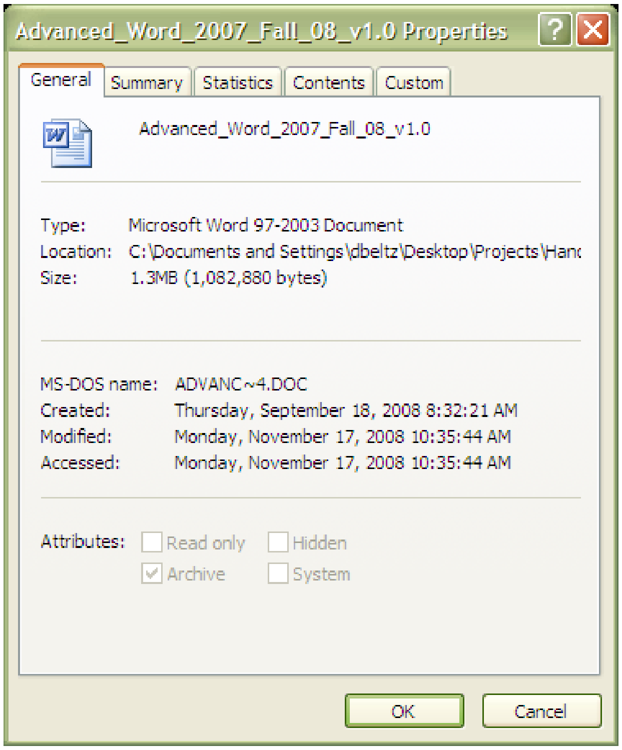


Figure 45 - Properties Dialog Box

Figure 46 - Properties View in the Open Dialog Box

To view partial properties from the Open dialog box:

1. Click the **Office Button**.
2. Select the Open option. The *Open* dialog box will appear.
3. Click the ***Views*** drop-down arrow (see Figure 47).
4. Select Properties from the drop-down list.
5. If necessary, navigate to the drive and folder where the file is located.
6. Single-click the file to activate the partial properties panel (see Figure 46).

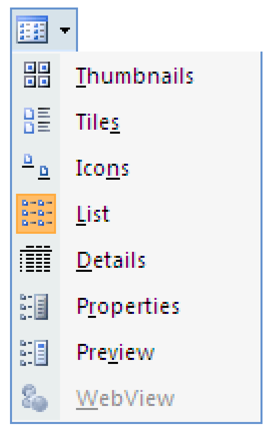


Figure 47 - Views Drop-Down List

NOTE: If the computer is set to open files using a single click, step 6 above will open the file without displaying the partial list of properties. It is also possible to view a brief properties description (size, type, date modified) of the document by selecting ***Details*** from the ***Views*** drop-down list of the *Open* dialog box.

Editing Document Properties

The complete document properties can be found in the *Properties* dialog box (see Figure 45) in the *Summary* or *Custom* tabs. In the *Summary* tab there are preset fields where a user can insert new information or modify existing information. The user can also enter the title and subject text, enter or change the name of the author, assign categories or keywords or include comments. In addition to the existing fields, there are options in the *Custom* tab to create new fields and field information.

Using SmartArt

SmartArt is a new feature in Word 2007. ***SmartArt*** is a visual representation of information and ideas that combines text and graphics so that information can be shown in a more visually enhancing manner. Figure 48 is an example of ***SmartArt***. When the ***SmartArt*** graphic is placed in a document, text can be automatically entered. The advantage to using ***SmartArt*** is that the user does not have to draw any of the graphic shapes. They are automatically created when the graphic is selected. The SmartArt graphic can be formatted if a different appearance is desired.

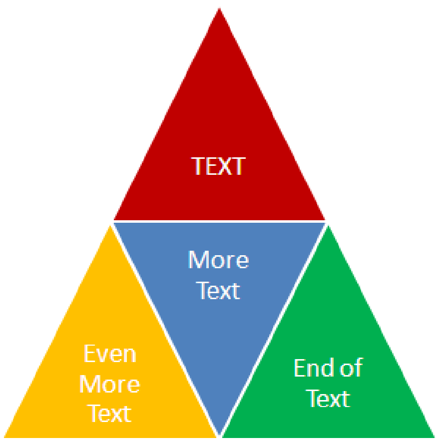


Figure 48 - Example of SmartArt

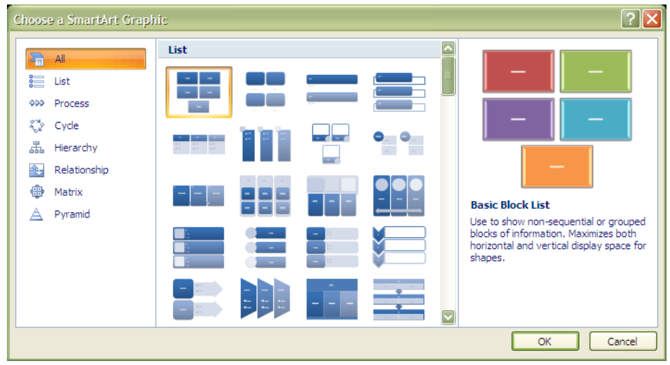


Figure 49 - Choose a SmartArt Graphic Dialog Box

To incorporate a SmartArt graphic onto a document:

1. Select the *Insert* tab on the **Ribbon**.
2. Click the **SmartArt** button in the ***Illustrations*** group. The *Choose a SmartArt Graphic* dialog box opens (see Figure 49).
3. Select the category in the left column of the dialog box; select the graphic in the *List* section of the dialog box. A description is provided in the preview pane on the right side of the dialog box (see Figure 49).
4. After the graphic is selected, click the **OK** button. Text can then be entered by clicking in any part of the graphic where "***[Text]***" appears

NOTE: Text can also be entered by clicking the **Expand/Collapse** button  on the left edge of the graphic and opening the *Type your text here* dialog box (see Figure 51). Click the **Close** button  when finished and the text will automatically appear in the graphic.

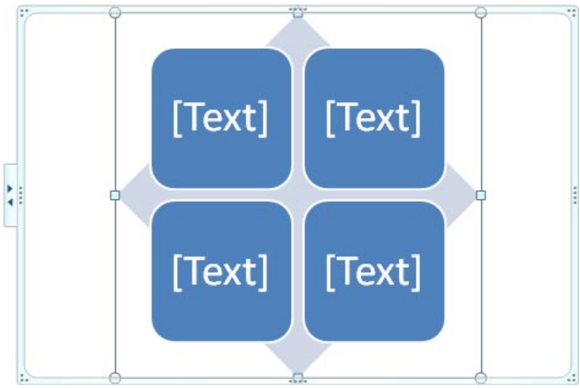


Figure 50 - Sample Blank SmartArt Graphic

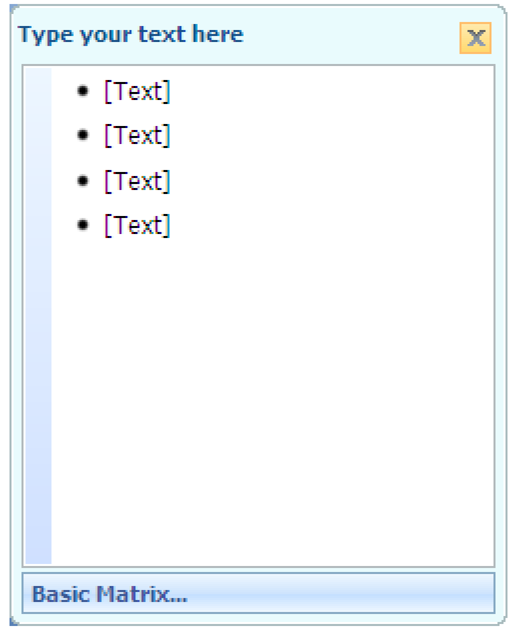


Figure 51 - Type Your Text Here Dialog Box

To format the graphic:

1. Select the object so that the sizing handles are visible as in Figure 50.
2. Right-click anywhere inside the object and select the Format Shape... option. The *Format Shape* dialog box opens (see Figure 52).
3. Choose the appropriate options until the desired formatting effects are displayed by the graphic.
4. When finished formatting the graphic, click the **Close** button.

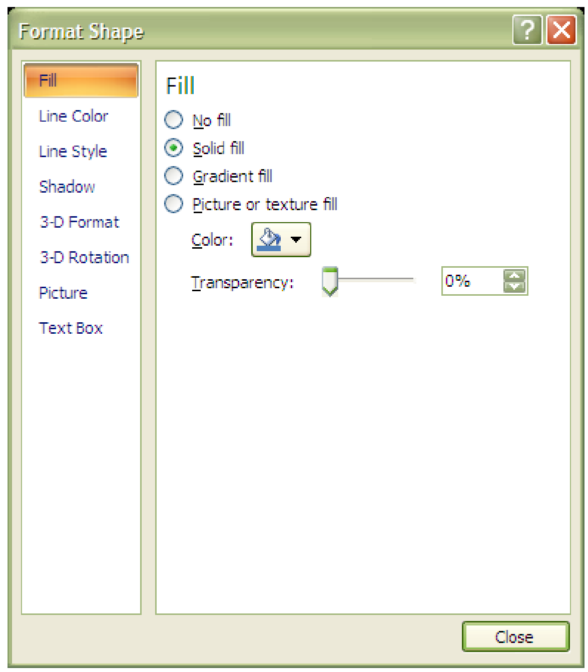


Figure 52 - Format Shape Dialog Box

Using the Version Compatibility Checker

A new feature in several of the Microsoft Office 2007 applications is the ***Compatibility Checker***. The ***Compatibility Checker*** will inspect documents created in Word 2007 to see if the worksheets contain objects such as ***SmartArt*** that are incompatible with earlier versions of Word.

To run the Compatibility Checker:

1. Click the **Office Button**.
2. Select the Prepare option.
3. Select the **Run Compatibility Checker** option. The *Microsoft Office Word Compatibility Checker* dialog box opens (see Figure 53). Any incompatible items will be identified in the dialog box.
4. Click the **OK** button to close the dialog box.

NOTE: If no incompatible items are identified in the workbook, the dialog box will still open and indicate that no incompatible items were found.

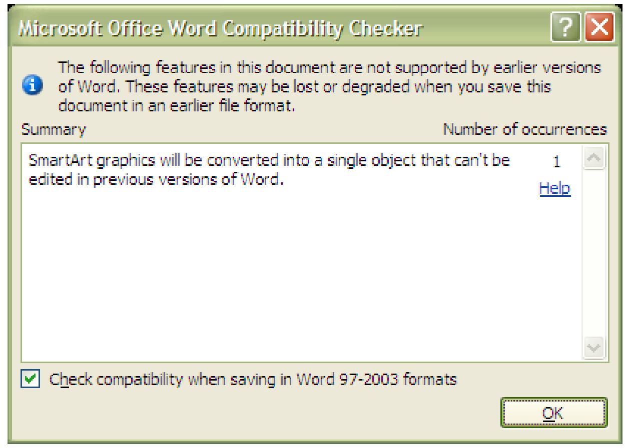


Figure 53 - Microsoft Office Excel Compatibility Checker Dialog Box

By default, Word will check the backward compatibility of any presentation when it is saved in the Word 97-2003 Document format. If no incompatible items are found, the *Microsoft Office Word Compatibility Checker* dialog box will not open. If an incompatible item is identified and the user proceeds to save the document, the incompatible item will be degraded so that the document will open in an earlier version of Word. For example, ***SmartArt*** objects will be converted to non-editable images that will open in the earlier version.

Using the Document Inspector

Another new feature in Microsoft Office 2007 applications is the ***Document Inspector*** feature. Documents may sometimes contain hidden or personal information that a user may be unaware of, or does not want to share with others if copies of the document will be distributed. Personal information can also become embedded in the form of metadata when document properties are set. The ***Document Inspector*** will identify any potential information that a user may want removed before distributing a document and give the user the option to remove it.

To use the Document Inspector:

1. Click the **Office Button**.
2. Select the Prepare option.
3. Select the Inspect Document option. The *Document Inspector* dialog box opens (see Figure 54).
4. Users are presented with six categories of information that the ***Document Inspector*** will search for. Each of the categories can be either selected or deselected by the user with the associated check boxes.
5. When the categories have been selected, click the **Inspect** button.

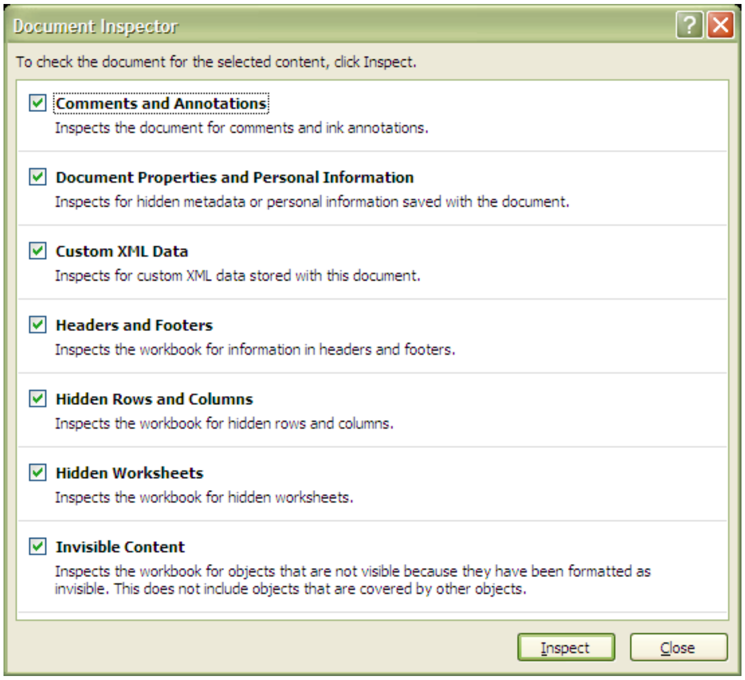


Figure 54 - Document Inspector Dialog Box

6. When the ***Document Inspector*** completes its search, the *Document Inspector Results* dialog box will open (see Figure 55).
7. If any potential personal information is found within the document, the user can choose to ignore it or eliminate it by clicking the **Remove All** button.
8. The user can re-inspect the document by clicking the **Reinspect** button, or, if no further actions are needed, click the **Close** button.

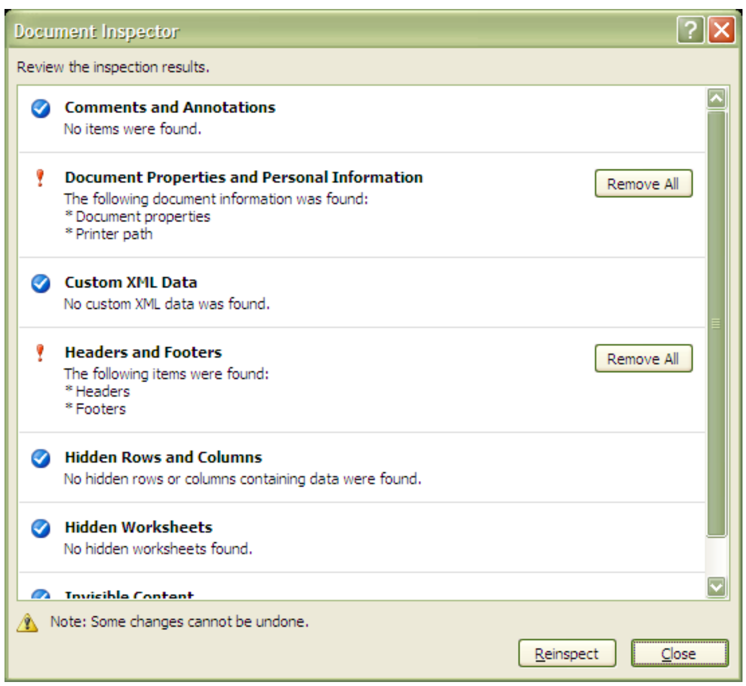


Figure 55 - Document Inspector Results Dialog Box