



# Microsoft Word 07

<b>The Basics.....</b>	<b>1</b>
The Keyboard .....	1
The Screen.....	1
Mouse Commands .....	1
Highlighting Text with Keys.....	2
Inserting and Removing Text .....	2
Keypad Moves.....	2
Control (command) key shortcuts .....	2
<b>File Management .....</b>	<b>3</b>
<b>Viewing Your Document.....</b>	<b>3</b>
<b>Moving Text .....</b>	<b>3</b>
<b>Formatting the Document .....</b>	<b>4</b>
Reveal Formatting.....	4
Section Breaks.....	4
<b>Using the Ruler .....</b>	<b>4</b>
Tabs.....	4
Tables .....	5
<b>Shortcuts.....</b>	<b>5</b>
AutoCorrect.....	5
Insert .....	5
Page Layout.....	5

References .....	6
Generating a Table of Authorities.....	6
<b>Advanced Formats .....</b>	<b>6</b>
Format painter ("Home").....	6
Bullets and numbering ("Home").....	6
Drop cap ("Insert").....	6
Headers and footers ("Insert").....	7
Columns ("Page Layout") .....	7
<b>Working with Styles .....</b>	<b>7</b>
Editing Styles and New Styles .....	7
Changing Your Default Format.....	8
<b>Graphics .....</b>	<b>8</b>
<b>SmartArt .....</b>	<b>8</b>
Manipulating smartart .....	8
Design.....	9
Format.....	9
<b>Templates .....</b>	<b>9</b>
<b>Envelopes and Labels .....</b>	<b>10</b>
<b>Mail Merge.....</b>	<b>10</b>
Merge to Envelopes and Labels .....	11

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## The Basics

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Word is a *page-oriented* word-processing program. This means the program automatically determines where a new page begins, and leaves room for the top, bottom, left, and right margins. The preset (“default”) settings are page size of 8½ by 11 inches, with top and bottom margins of 1 inch, and left and right margins of 1 inch. At the bottom of the screen is the **status line**, which shows your location in the document: page number, section, total page count, and cursor position (from top of the page, and line and column). As the cursor moves (either by typing, or using the arrow keys on the keyboard, or clicking with the mouse), the status line changes to reflect the position.

Once Word is on your screen, you are ready to type. No layout, format, or design instruction is necessary to begin. If you wish to change the settings, do so before you type, as you type, or after you type.

When working with any computer word processing program, you must *not* hit Enter (Return) at the end of every line. Word *wraps* text that doesn't fit on one line onto the next line. Only at the end of paragraphs and where blank lines are desired should returns be inserted. “Word wraps” automatically change whenever your text changes; hard returns must be manually removed using Delete or Backspace.

### The Keyboard

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Several keys on the keyboard have purposes specific to Word. The keyboard consists of four components: the alphanumeric keys (like a typewriter), the cursor movement keys (the arrows) and accompanying key functions, the numeric keypad (similar to a pocket calculator), and the function keys.

### The Screen

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At the bottom left of the screen is the status line showing your page, section, page count, word count, and more (right click to select your choices). Use your right clicker to expand the options. In the lower right corner are “View” buttons and zoom features.

At the right side of the screen is a vertical scroll bar for moving up and down. *Moving with the scroll bar does not move the cursor location.* The scroll bars can be used three different ways. You can click on

the arrows to move line by line, you can pull the box (“elevator”) on the bar to go to the top or bottom of the document, or you can click on the blank area to move screen-up or screen-down (or left or right).

At the bottom of the scroll bar are two double-arrows; these are “page up” and “page down” commands for moving an entire page at a time. In between is a circle which provides alternate “go-to” shortcuts.

The top of the screen is divided into two parts: the *quick access toolbar* and the *ribbon*. The top line, next to the round *Office Button*, shows you commonly used operations such as *save* and *open*.

Below the quick access toolbar is the **ribbon**, which is divided into “tabs” of choices. The tabs show you “buttons” for various commands, separated into “groups” (such as Font or Paragraph). In the corner of each group, you will usually see a little boxed arrow, which opens a dialog window with more options.

To use a feature, click it (once) with the mouse pointer. For example, to turn on bold, point the mouse arrow at it and click the center of the “B.” To turn it off, click the “B” again. Some buttons have “drop-downs” with choices, indicated by a downward pointing arrow; click the arrow for options.

Another important selection under “View” is the ruler bar. The ruler shows tabs, indents, and margins—and allows you to change them.

As you work, if you highlight (select) an area of text, you will see a faint shadow ribbon appear. Moving your mouse towards it makes it more “solid.” It is a shortcut toolbar for commonly used formats.

### Mouse Commands

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To select a particular area of text to format, use your mouse or your keyboard to highlight it. The basic mouse move to highlight is point, click, and drag the mouse. Don't let go of the mouse button until you get exactly what you want highlighted. Once you've released the mouse button, if the highlight is not correct, you have to restart. Click on any text to turn off the highlight. Quick highlights can be done with the following mouse commands:

- Click — Position cursor.

- Click, Hold, and Drag — Position cursor and highlight; drag down (not over) to move from line to line.
- Double click—Point at a word and click twice to highlight the entire word.
- Triple click—Point at any word and click three times to highlight the entire paragraph.

You can also highlight by pointing and clicking in the left margin. Clicking once in the margin highlights one line. Clicking twice in the margin highlights one paragraph. Clicking three times in the left margin highlights the entire document. You can highlight line-by-line by pointing in the left margin, clicking and holding, then pulling the mouse down or up. Other mouse commands include these:

- Click in Left Margin—Line highlight. (Be sure the mouse symbol is an arrow.)
- Double Click in Left Margin—Paragraph highlight.
- Triple Click in Left Margin—Document (global) highlight.
- Ctrl Click—Select sentence.
- Shift Click—“Range extend.” First, position your cursor at the beginning of what you wish to highlight. Then, point at the end of the desired highlight area, hold the shift key, and click. Everything from cursor to the point-position is highlighted.
- Alt+Shift Click—Create a block (useful for tabular columns).

## Highlighting Text with Keys

To highlight with the keyboard, hold the shift key and use your cursor arrows to move around. As you move with the arrows, the text is highlighted. To undo the highlight, let go of the shift key and move with the cursor arrow.

An alternative way to highlight with the mouse is to click to position your cursor, hold the shift key and click at a second area of the screen. Everything in between will be highlighted for you.

- Shift-Arrow — Highlight text
- Control-Shift-Arrow — Highlight text word by word
- Shift-Home — Highlight to beginning of line
- Shift-End — Highlight to end of line
- Ctrl-Shift-Home — Highlight to top of document from cursor
- Ctrl-Shift-End — Highlight to end of document from cursor

## Inserting and Removing Text

To type new text into text already typed, the most important rule is to position your cursor exactly at the point where the new text goes. *Remember: the mouse is not the cursor.*

There are three ways to remove text. **Delete** removes text following your cursor. **Backspace** removes text backwards from your cursor. If text is highlighted, pressing any key that types deletes what is highlighted.

## Keypad Moves

- Home — Move to beginning of line
- End — Move to end of line
- Control+Home — Move to beginning of document
- Control+End — Move to end of document
- Arrow Keys — Move character-by-character or line-by-line
- Control-Arrow — Move word-by-word (left, right) or paragraph (up, down)
- Insert — Turns on “typeover” mode to replace text already on screen
- Page Up/Down—Move screen by screen
- Paragraph Breaks — Enter
- Page Breaks — Ctrl-Enter
- Line Breaks (same paragraph)— Shift-Enter
- Hard Spaces — Ctrl-Spacebar (non-breaking spaces)

## Control (command) key shortcuts

a	Select (highlight) all
b	<b>Bold</b>
c	Copy
d	Fonts
e	Center
f	Find
g	Go to
h	Replace
i	<i>Italic</i>
j	Justified left to right
k	Insert hyperlink
l	Left align
m	Indent
n	New document
o	Open document
p	Print
q	Redo
r	Right align
s	Save
t	Hanging indent
u	<u>Continuous underline</u>
v	Paste
w	Close document
x	Cut
y	Repeat

- z Undo
- 1 Single space
- 2 Double space
- 5 1.5 space
- space Reset to normal
- + Superscript
- = Subscript
- Discretionary hyphen

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## File Management

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*“New” versus “Open”*—Open retrieves a document from a disk. New starts a document. If a document is currently in use, “New” does not clear it from the screen. The first document goes into a window (workspace), and the new document goes in a new window.

*“Save” versus “Save as”*—“Save” stores the current document in the “07” format, asking for a filename that can be up to 256 characters in size (automatically adding a 4-character extension, “.DOCX”). If the document has already been saved, pressing “save” simply resaves it with no questions asked. “Save as” allows you to save a document under a different name (change the name), creating a copy. It gives you an option to specify file format (such as “97-03” or “Rich Text Format”).

*“Close” versus “Exit”*—“Close” closes the window currently open. “Exit” closes all windows and quits Word. If document(s) have not been saved, both commands prompt you to save your work.

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## Viewing Your Document

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The “View” toolbar (lower right corner) gives you five different ways to look at your document:

- Print Layout—Recommended. What you see is what you get.
- Reading Layout—The *Reader’s Digest* approach, big print, small pages, to make the document easier to read (has no impact on printing).
- Web layout—Used to convert a Word document into an HTML web page.
- Outline—For typing outlines.
- Normal—Draft mode, which means you don’t see the page margins or breaks.

On the Quick Access toolbar (top left) is “print preview.”

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## Moving Text

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The basic way to move text around within your document involves a **cut-and-paste operation**, located under the “Edit” menu. To move text, first highlight it, then use Edit and chose the option called “Cut,” which will remove your text from the screen (sending it to the Windows clipboard); alternatively, use “Copy” to make a copy of the text for moving while leaving the original.

Then, move your cursor to where you would like to have the cut/copied text be placed. Use Edit to “Paste” the text back into your document. All following text will move down to leave room for it.

Only one section of cut text is active at any one time. When cut (or copied), it is stored in the Windows clipboard, viewable in the Task Pane at the side of the screen. Paste does *not* clear what is in the clipboard. This means you can paste the same text over and over.

You can also cut/copy and paste using the scissors, double-page, and clipboard buttons on your Home ribbon, or Ctrl+X (cut), C (copy), and V (paste) on your keyboard.

Cut and paste also works across documents, and across programs. However, if you use “Paste Special” (on the Edit menu), you will find all sorts of options about *how* you want to paste your item, including a command to “link” to the original, so that if the original changes, so does the copy you’ve pasted.

**Another way to move text is to highlight it, release the mouse, then click and drag the highlighted area. With the text highlighted, point your mouse at the middle of the highlighted area, click (don’t let go of the mouse button), and pull the text to the new spot where you want it relocated. This is called “drag and drop.”**

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## Formatting the Document

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Remember that Word is easier if you first use “View/Print Layout” and then go to “Word Options” on the Office Button to turn on “text boundaries” to see margins on the page. Remember the **key rule** in Microsoft Word: **formats are divided into four levels**.

Level	What It Affects	Available operations
1. Font	Cursor Position or Highlighted Area or Automatic Word Select	Bold, Italic, Underline Font, Size, Super/Subscript Cut and Paste
2. Paragraph	Enter (return)	Spacing Tabs Indents Bullets Numbers Borders, Styles
3. Section	Page Layout/Breaks/Section	(same as Document)
4. Document	Everything	Paper size Orientation (landscape, portrait) Margins (top, bottom, left, right) Page numbers, Headers/footers Columns

### Reveal Formatting

On the Ribbon’s pull-down for Styles is an option called “Styles Inspector.” There you’ll find an option called “Reveal Formatting.” This screen shows you the formats currently being used for whatever text you have clicked on. They are separated into the big three categories: font, paragraph, and section.

### Section Breaks

Remember that one of the secrets to Word formatting is to insert section breaks (usually either continuous or next page) whenever you work with margins, headers/footers, paper size and orientation, or columns.

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## Using the Ruler

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- **Right Paragraph Indent**

The right triangle controls the right margin of the selected paragraph.

- **Left Paragraph Indent**

The square box at the left will indent the entire paragraph. When you drag it, all parts of the left move.

- **Paragraph Indent**

Above the square box is a triangle (like the roof on a house), which indents the entire paragraph *except for the first line*.

- **First-Line Indent**

At the top of the ruler (above the left house shape) is a downward pointing arrow, which indents *only the first line of the paragraph* (including bullets and numbers, useful for setting up “hanging indents”).

- **Right Margin**

The right edge (where the white meets the gray on the ruler, above the house-shape) controls the right margin of the entire document (or section).

- **Left Margin**

When the pointer sits between the first-line indent and paragraph indent triangles, it becomes a double-arrow, which changes the margin of the *entire document or section*. Measure the margin by watching the number in the *gray* area, not the white area.

### Tabs

Tabs make text line up at specific positions on the page, such as for forms or for decimal alignment. To set tabs, first click on which kind of tab you would like: Left, Center, Right, or Decimal (the menu also includes “bar” or vertical bar lines). Then click on the ruler with your mouse to position the tab. If you don’t like where it is, pull it with your mouse to a different location. If you want to remove it, click and pull it off the ruler. Under the “Format/Tabs “ menu, is a dot leaders and underlines between tabs, as well as clear all.





- *Arrange*—Front to back, align, text wrap (for objects such as pictures).

## References

- *Cross-Reference—Table of Contents*—Label high-lighted text for inclusion in a table of contents, then generate the table, with page numbers.
- *Footnotes*—Insert footnotes or endnotes.
- *Citations and Bibliography*
- *Captions*—Cross-references (allows you to insert a link in your text to another page, heading, footnote, or table, so that if the target changes (for example, page 3 may be page 4 or 5 when you're done), the reference updates automatically).
- *Index*—Alphabetical list of key words.
- *Table of Authorities*—Legal cites.

If you do not like the format Word applies to the results, do not try to format manually. Since these "tables" and "indices" are automatically updated (i.e., page numbers change whenever your text changes), be sure to make format changes through "Style" using the appropriate styles.

## Generating a Table of Authorities

Marking citations for a table of authorities is comparable to manually marking headings for a table of contents. Word looks for cases, statutes, rules, treatises, and constitutional provisions to generate a table of authorities. You can also mark any additional authority you need included.

**Step 1:** Type your legal document, including all the cases, statutes, rulings, treatises, regulations, and Constitutional provisions that you will cite. You may either mark the citations as you type, or finish the paper and then go back through it, marking the citations at the end.

**Step 2:** Mark your citations. Highlight the citation that you wish to mark. In Word 03, choose "Insert" on the menu bar. Navigate down to "Reference" and click on "Index and Tables." (In Word 07, go straight to *References*.) Choose the "Table of Authorities" tab at the top of the dialog box. Click on the "Mark Citation" button. Choose the category of your citation from the drop-down list (e.g., case, ruling, regulation) and click "Mark" or "Mark All" (depending on whether you want to include all references to this particular citation in the table of authorities or just

one instance). The following dialog box will appear. Click Next Citation. Word searches the document for terms such as: in re, v., Id., Supra, Infra, Cong., Sess., and §.

**Step 3:** Click the "Next Citation" button at the top of the dialog box. Microsoft Word searches for common legalese such as "v." and dates in parentheses "(1950)." Mark each citation as appropriate. Click the "Close" button to return to your document. You may want to do a manual scan of the document to ensure Word correctly picked up all your legal citations.

**Step 4:** Move your cursor to the point in your document where you wish the table of authorities to appear. In Word 03, choose "Insert" on the menu bar, and navigate to "Reference" (go straight to *References* in Word 07) and click on "Index and Tables." Choose the "Table of Authorities" tab at the top of the dialog box (or "Insert ToFA" in 07). Make sure the Category type is set to "All" if you wish your table to include all types of legal citations. Press "OK." Word creates a table of authorities using all your marked citations, organized by citation type.

*A note about "passim":* If checked and a citation is referenced on more than 5 pages, Word will put the word "passim" in place of the page numbers. If unchecked, Word allows all referenced pages to be listed, no matter how many there are.

## Advanced Formats

### Format painter ("Home")

Copies a format from highlighted text, then pastes it to another highlighted area. To use the painter, first highlight the text whose format you want to copy; then click the painter button. Next, scroll to the area of text that you want to re-format in the new style, and highlight it. *This stops the painter* (it will only do one selected area at a time; you must re-click the painter to do a second area).

### Bullets and numbering ("Home")

Formats for how the bullets/numbers look, including custom bullets such as ☸ ☞ ☒ ☑ ☒.

### Drop cap ("Insert")

Enlarge the first letter of a paragraph and wrap text around it. Note that this function will not work with

tabs before the letter since it “frames” the first space on the line.

## Headers and footers (“Insert”)

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Headers go at the top of pages, and can contain text, date, page number, and rule line. Footers go at the bottom. Two page number tabs are already set for centering and flush right. (*Important: Remember that headers, footers, and page numbers are controlled by section breaks.*) The ribbon options for this function have the following choices:

1. Built-in (pre-set formats)
2. Edit header
3. Remove header
4. Save selection to header gallery

The “Insert/Page Numbers” dropdown allows you to choose a number location (top or bottom, margins, or cursor position), and left, right, center—and whether or not to show the number on the first page. Also in this window is a “Format” button, which allows you to tell Word to continue numbering a particular section consecutively from the previous section *or* to start re-numbering the current section from a particular number within the document (useful when you have a cover page, table of contents, *then* want the third page to be numbered page one).

## Columns (“Page Layout”)

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This button separates document into multiple, newspaper-style columns. The “Format” menu for columns includes options for margins and a line between columns. To put columns into part of a document, the document must be divided into “sections” with “continuous” breaks.

## Working with Styles

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Styles are saved formats that can be re-used. The important thing to know about styles is that Word uses them whether you do or not, and many functions in Word (such as Table of Contents) will not work without styles. Every feature of Word has an assigned style, such as page numbers, headers and footers, footnotes and endnotes, and envelopes and labels. When you start a new document, you are already using a style called “Normal.”

Styles can be edited. It is important to understand in Word that if you do not like what a style is doing to your text, don’t change the text—change the style!

On the Home ribbon, the button called “Styles” expands the styles screen into a drop down. Hover over any to get a description.

At the bottom of the Styles window are three commands. One creates new styles and adds them to the list. The second is the style inspector, which will let you modify your styles. The third is manage your styles, which lets you remove styles.

## Editing Styles and New Styles

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Since styles are ways to store your formats for re-use, you can either create new styles or edit (“modify”) existing styles (you can also highlight an area of text with a desired format, then click on the style box to get a menu to “redefine” the style on the highlighted text).

- **New Style**—Requires you to specify a name (which shows on the format toolbar); a style type (change the paragraph or just the highlighted area); based on (used other style as base format); and style following paragraph (the next style to switch to when you hit enter). Then you change the format.
  - **Modify Style**—Change an existing style. The format option gives you choices to change
    - **Font**—allows you to specify font, font size, color, position (super/subscript), characteristics (bold, italics, small caps, underline, etc.), and spacing (normal, expanded, or condensed).
    - **Paragraph**— *formats* specify paragraph alignment (left, center, right, justified), indents (left, right, first line), spacing (before or after, or between lines), based on style, border (box or bar), keep together, page break before, and line numbering
    - **Tabs**—tab settings for the style
    - **Borders**—sets borders and shades around the paragraph
    - **Language**—codes text so Word will use different language spell checkers
    - **Frame**—creates “cutouts”
    - **Numbering**—automatic numbers
    - **Shortcut key** (assign an keyboard combination to run the style, such as Ctrl+Sh+I)



Unless otherwise specified, styles are paragraph formats, and automatically affect the entire paragraph.

The automatic setting is that a style is available only in the document on which you are working. If you wish to make a style available in other documents, you must add it to a template; then you will have access to it any time you are working on a document based on that template.

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## Changing Your Default Format

To change your automatic (default) type format in Word, use “Styles” to redefine your “normal” style. Be sure to check “New Documents based on This Template” so it is saved.

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## Graphics

On the Insert tab of the Ribbon, Word gives you commands to insert

- Pictures—photographs, inserted from files, which can then be sized, and formatted in various ways.
- Clip Art—free artwork from Microsoft, including cartoon, animations, photographs, and sounds, most on-line (must be downloaded to use)
- Shapes—graphical shapes (such as stars and boxes) which can be used to hold text
- SmartArt—specially designed graphical displays for showing lists, processes, hierarchies (such as organization charts)
- Charts—graphs based on data, entered into an Excel spreadsheet, but embedded into Word.

Once you have inserted any form of graphic, you can then edit with tabs that appear for Design and Format.

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## SmartArt

SmartArt is a new way to present information in a visually appealing way (I hope), without resorting to bland bullets or boring lists. It works consistently across Word, Excel, and PowerPoint. You begin by using the Insert tab on the ribbon, where you find

SmartArt listed in the Illustrations group. Clicking it brings up a selection of SmartArt types, including List, Process, Cycle, Hierarchy, Relationship, Matrix, and Pyramid, each with a variety of formats. Select one to insert the SmartArt skeleton into your document. This automatically adds two new tabs to the ribbon: Design and Format.

At the left of the SmartArt is a text-typing area which can be closed (X in the corner) or opened (double-arrows on frame). Press enter to create a new level; press Tab to indent or create a sub-bullet. When formatting and designing, note that many of the selections can be “previewed” by pointing your mouse at the option (but don’t click).

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## Manipulating smartart

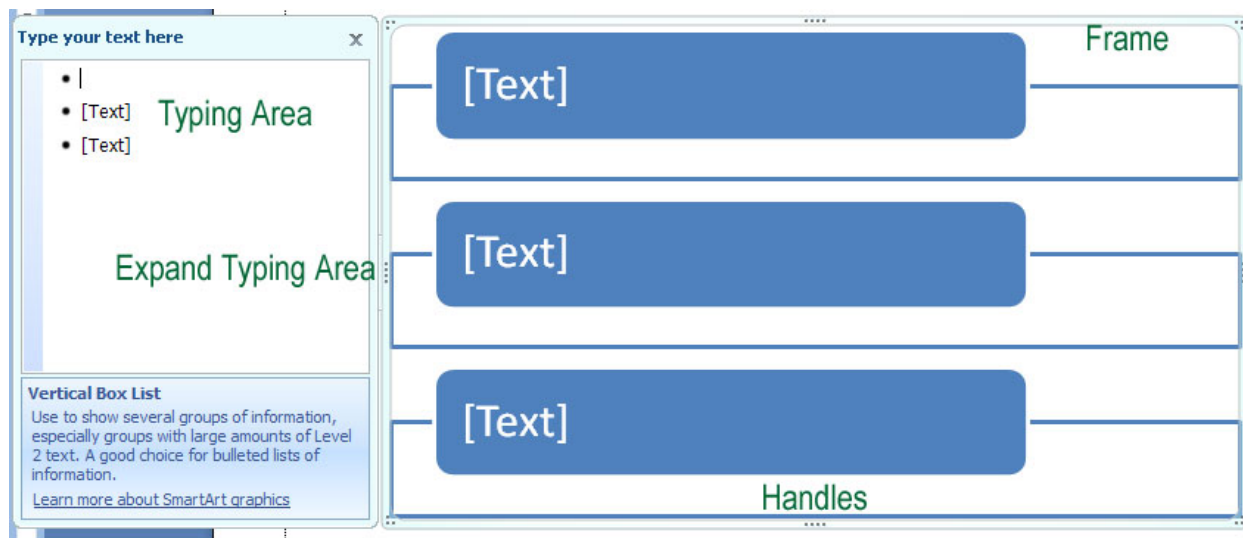
**Selecting:** To manipulate a SmartArt object, you first select or highlight it. To do this, simply place your pointer anywhere in the graphic and click once. Graphical “handles” should appear on the edges.

**Moving:** With the object active, point the mouse at the frame or border outlining the graphic, then click and drag, moving the mouse, and the chart moves with you.

**Resizing:** To enlarge, shrink or change the shape of the object, place the pointer on any of the “handles” on the frame until the pointer’s shape changes into double-arrows, then click and drag. The outline you draw will change the chart accordingly. Corner handles enlarge and shrink. Many of the components of a SmartArt object also have handles, which can be stretched and pulled to re-size that part of the graphic.

**Formatting:** Clicking once on a SmartArt object will allow you to move it or change its dimensions. But you may want to change other aspects as well. One option is to click once on any specific part of the chart, then right-click with your mouse to find “change” and “format” options. Alternatively, you can use the ribbon tabs, as explained below. Remember to click the Home tab for simple formats (font, size, center, color).

**Deselecting:** After completing your changes, simply “Click Away” – click any where in the document outside the object.



## Design

### Create Graphic

- **Add Shape** — Opens the dialog window that allows you to select the kind of chart you wish to have (column, line, pie, bar, area, XY, stock, surface, doughnut, bubble, radar). There are multiple designs for each chart type; for example, for column charts, there are side-by-side, stacked, percentile, and front-to-back.
- **Add Bullet** — Adds either another entry of the same level within the hierarchy, or a sublevel.
- **Right to Left** — Aligns content on the right instead of the left..
- **Layout** — Saves an edited chart as a template, so it can be re-used.
- **Promote/Demote** — Indents and unindents bullets and levels (same as Tab and Shift-Tab). Turns a main level entry into a subentry, or a subentry into a main entry.
- **Text Pane** — Activates the text-typing box.

### Layouts

This option allows you to switch from one SmartArt design into a different one, for example, from 3 horizontal boxes to 3 vertical boxes or to a pyramid.

### SmartArt Styles

- **Change Colors** — Select new color combinations (based on Theme colors) for the content.
- **Effects** — Various designs you can select to create 3-dimensional or shaded effects (note this is one of the features where you

can preview by pointing your mouse at an option without clicking).

### Reset

Cancels any formatting changes you have made and restores the SmartArt object to the original format.

### Format

#### Shapes

Impacts the shapes within a SmartArt object. You can change the shape (switch a box to an arrow), or make the shape larger or smaller.

#### Shape Styles

Predesigned or custom fills, outlines, and effects for the components of the graphic (such as fill colors or borders or shadows).

#### Word Art Styles

Predesigned or custom text formats (including text color, text border, and text effects such as glow).

#### Arrange

Bring to front or send to back (used when there are multiple objects embedded within a chart).

#### Size

The horizontal and vertical dimensions of your chart. This is an alternative way of sizing, as opposed to dragging handles.

## Templates

Just as there is never a time in Word when you are not in a style, the same is true of Templates. Tem-

plates are pre-formatted documents that can be re-used. They hold the paper size, margins, headers/footers/page numbers, columns, *and* styles. Any time you select a template, you automatically get a *new* document.

Word supplies a large variety of built-in templates. You activate them by using the “New” command on the Office Button. Choosing a template creates a new, unnamed copy of the original’s content on your screen (which many people erroneously try to do by using “Save as”).

To make your own templates, create a document as usual. Instead of saving it as a document, when you press Save, change the file type to read “Word template.”

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## Envelopes and Labels

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If you need to print an envelope or label as part of a letter, you do not have to highlight the address unless there is more than one. Go to “Mailings/Envelopes and Labels.”

Under Envelopes, you will have a dialogue box that should automatically show the mailing address from the letter. There is an optional return address that can be omitted by clicking the “omit” box. There is also an address book for storing and re-using addresses if Microsoft Outlook is installed on your system.

Under Envelope/Options, you can specify what size envelope to print, and what font and position to use for the addresses. Then you can decide whether to print the envelope straight to the printer, or add it to the letter to save it for future use.

The Label window is very similar. However, at the bottom of the window are two other options: print a full page of the same address (a sheet of labels to the same person), or print one label on the page (to re-use a partially used set of labels, which requires you to specify which column and row on the sheet to use). You can specify the label format through the Options button.

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## Mail Merge

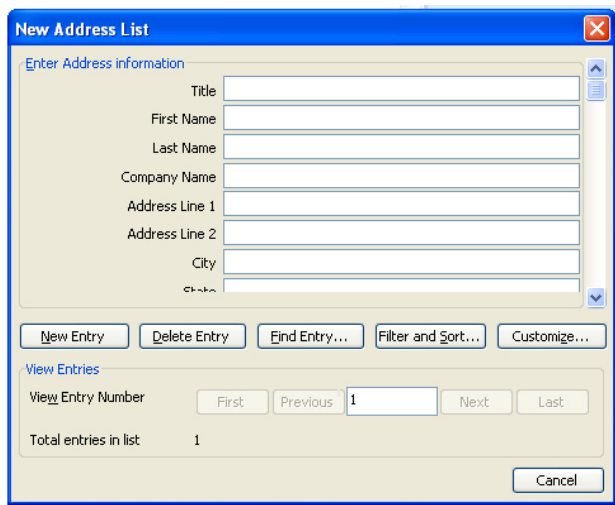
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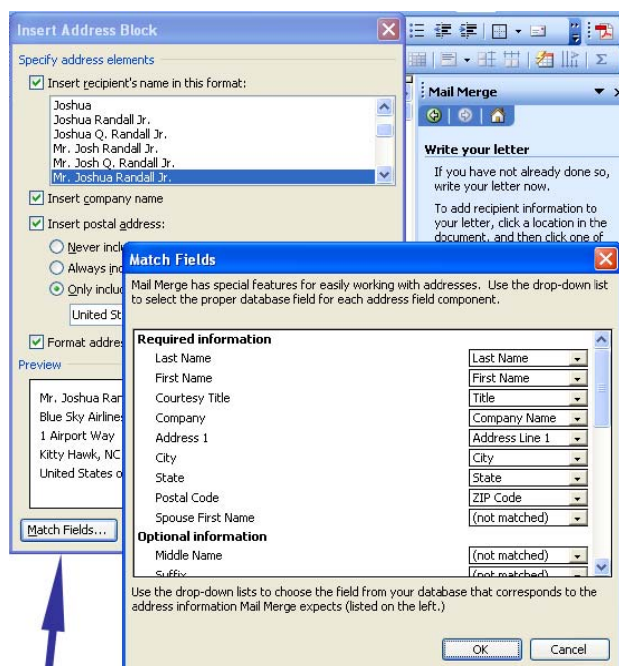
Mail merge is the ability to generate multiple letters, envelopes, labels, or emails, or to generate a “directory” from one list of data. To start a mail merge, go to the Mailing ribbon, and click on “Start Mail Merge.” The mail merge task pane will appear on the right side of your screen. There is also the “merge toolbar” across the top of your screen.

Mail merge is a “wizard”; there are 6 steps to complete the merge. Step 1 is to select the type of document you are trying to create: letters, email, envelopes, labels, directory (a directory used to be called “catalog” and compiles a formatted list from the data). Select the one you wish to do; you can only do one at a time (radio button). Then click at the bottom where the screen reads “Next: Starting document.”

Step 2 is “Select a document.” You can use the current document (whatever is currently on your screen), use a pre-existing template, or choose a different existing document (open a file). Select one, then click on “Next: Select recipients.”

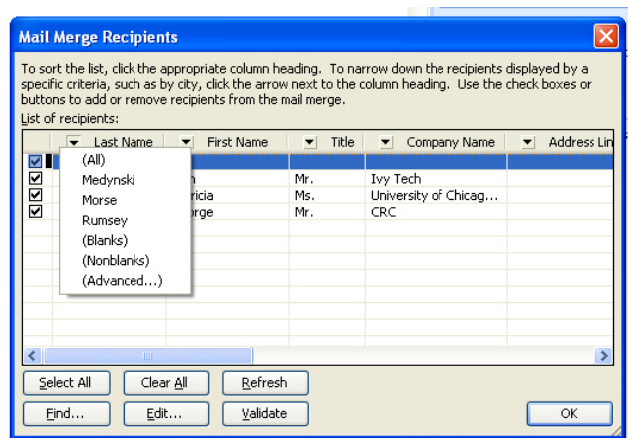
Step 3 is where you specify where your data are coming from. You can use an existing list (click on “Browse” to locate a preexisting list, as long as it is either a database .MDB file, an Excel .xls file, a Word .doc file, or a delimited .txt file), select from an Outlook address book (“Choose Contacts Folder”), or type a new list (“Create”). If you click “Create,” you will see a data entry screen where you can type your information; this screen is designed to match the other steps of the wizard; if you choose not to use





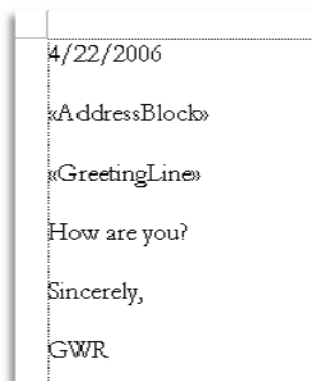
this form (you use “customize”) or if your data already exist from another source, you will need to do the “Match fields” in a later step.

Once your data are entered and saved, you are given an option to “select” recipients. The screen appears (it also appears when you click “Edit recipient list”), with check boxes next to each entry for selection. You can also click any column heading to sort (ascending or descending). You can also use the pull-down arrow next to each column heading to filter specific content or to go to “Advanced” querying or filter options and multiple level sort.



Step 4 is “Write your letter.” Even if your letter already exists, this step is where you place your fields onto the page for the actual merge. There are pre-designed recipient information fields ready to use,

based on the form screen: address block, greeting line, electronic postage, postal bar code, and more (individual fields). If your fields have not changed, you can simply select the position in your document, then click the appropriate field code to put that information in.



If your fields are different, then you need to re-define the list of items. If you click “Address block,” for example, you will see how it is created and what it contains. In the bottom corner is the button for “match fields,” which allows you to coordinate your own field names with the built-in fields.

Once you have designed your letter, you are then ready for Step 5, “Preview your letters.” Previewing gives you’re a navigation tool (<< or >>) for looking at various letters to see if you are satisfied; there is also a button to edit the recipient list and another to exclude a particular recipient.

The final step, Step 6, is to complete the merge. You can either send your merged output to the printer, or select the choice called “Edit individual letters.” This puts the letters on your screen so you can look them over, revise and customize, and then print.

## Merge to Envelopes and Labels

Merging to envelopes and labels follows essentially the same steps as for a letter. For an envelope, you have the optional step of designing your envelope (where do you want the address and return address to be, and what font and size should they be).

For labels, you have “Label options” where you can select which label size (including name tags and postcards) to print to. The only part that is different for labels is in Step 4, where you must do a step called “Replicate labels” (or “Propagate” on the toolbar). When you design one label with your fields, you need to take that same design information and place it on all the other labels for the page. This is accomplished by clicking “Update all labels.” If you forget to do this step, you will end up with only one label.