



# Microsoft Word 2007

## Module 2

<http://pds.hccfl.edu/pds>



# Microsoft Word 2007: Module 2

July, 2007

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# Objectives

Training participants have the option of completing the topics of choice. Upon completion of this entire module, participants will be able to:

1. Use the basic functions of Microsoft Word 2007 (Home Tab, Insert Tab, Page Layout Tab) to create and use documents;
2. Create a form template;
3. Add form functions and protection to a form template;
4. Set-up a mail merge using a letter document and an Excel data source;
5. Use the tools introduced in this training module to create new and modify existing documents.





## **Review of Microsoft Word 2007 - Module 1**

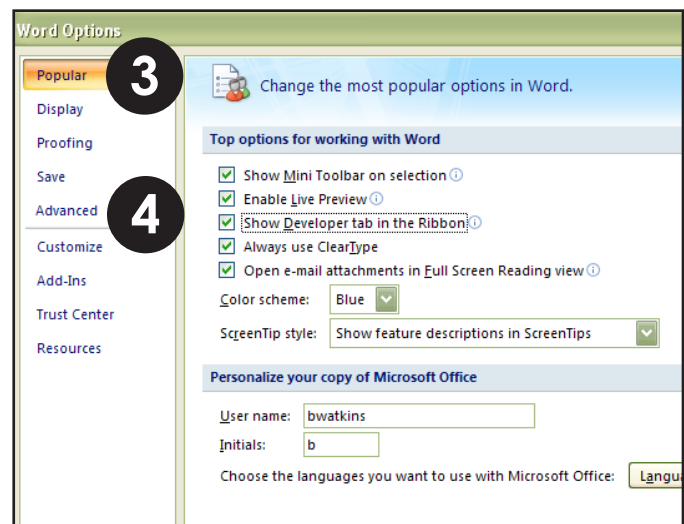
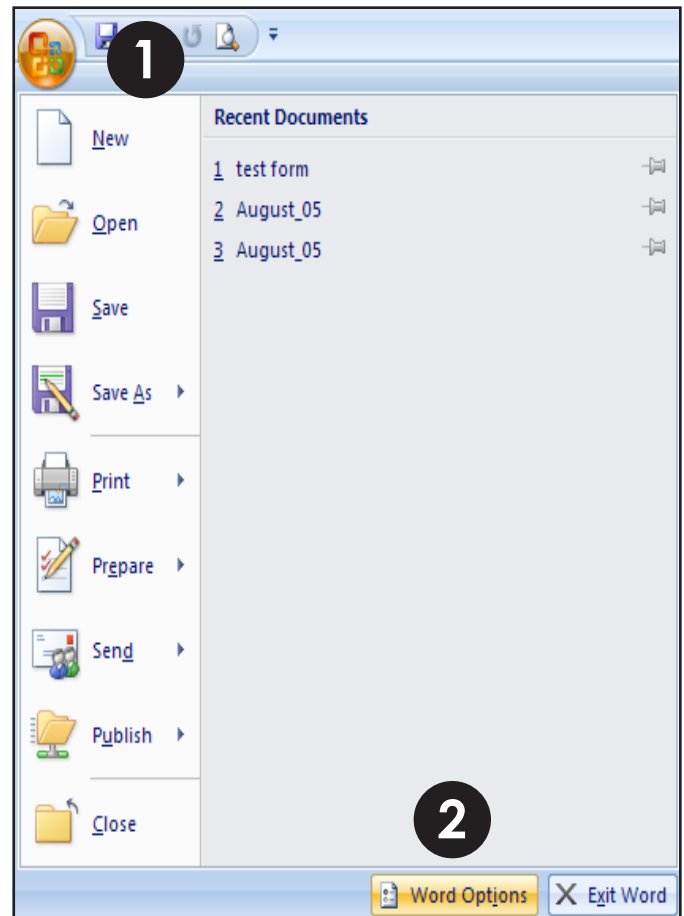
Your facilitator will provide you with a document. You have 15-minutes to recreate as much of the document as possible using the features that you learned in Word 2007 Module 1. (If needed, please ask your facilitator for a copy of the Word 1 module.)

## Creating Forms

To create a form, you can add content controls and instructional text that allow you to send the form to others to fill out using Word 2007. You can also create a form by starting with a sample template.

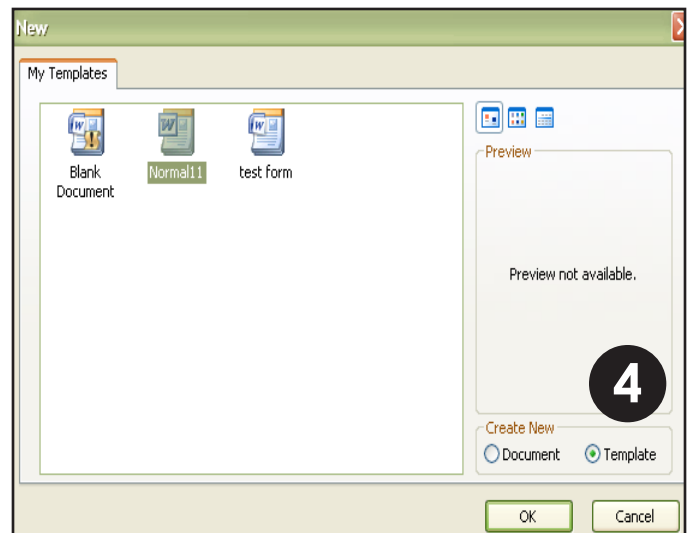
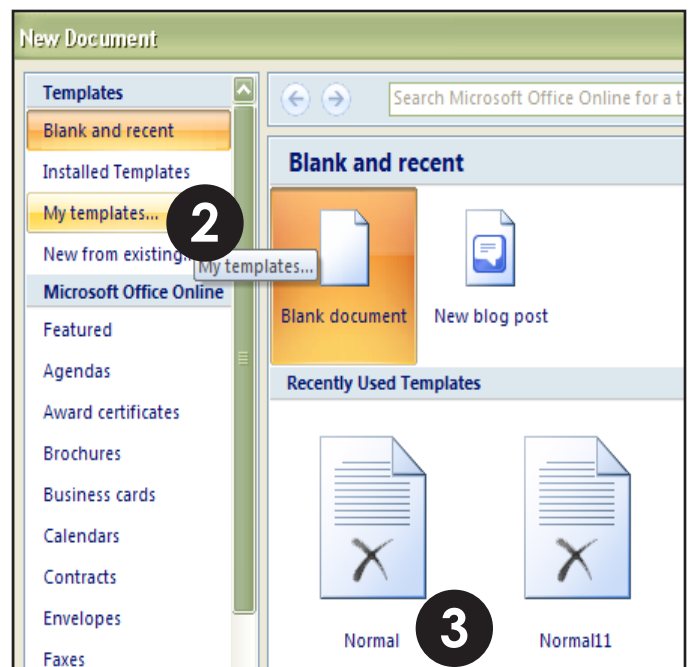
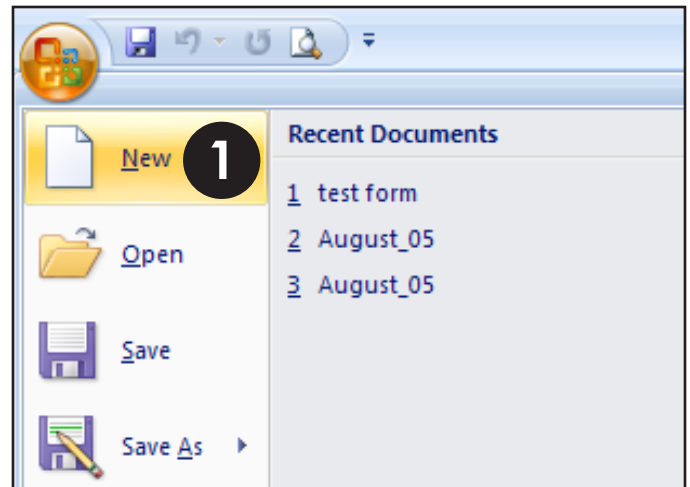
### Step 1: Set up Word for creating forms.

1. Click the **Microsoft Office Button**.
2. Click **Word Options**.
3. Click **Popular**.
4. Click the **Show Developer tab in the Ribbon** check box.
5. Click **OK**.

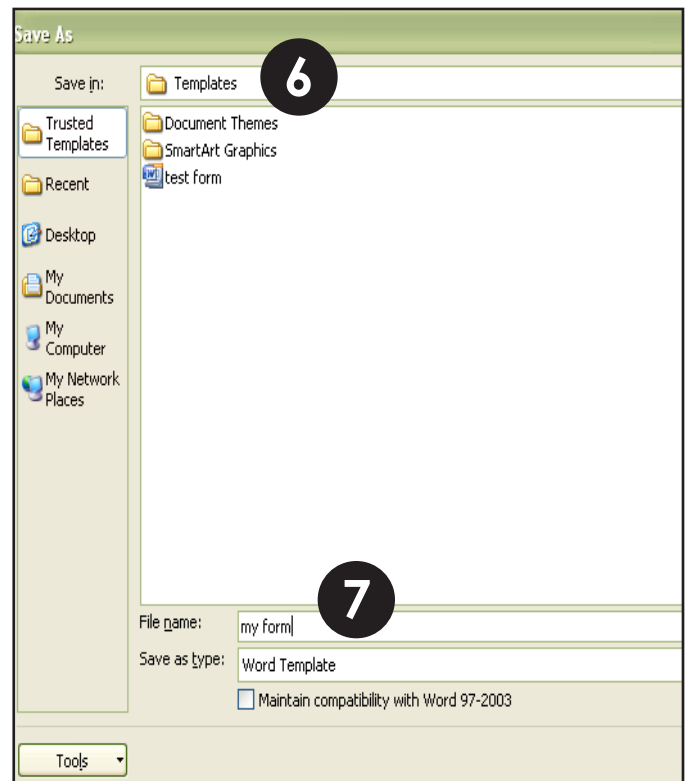


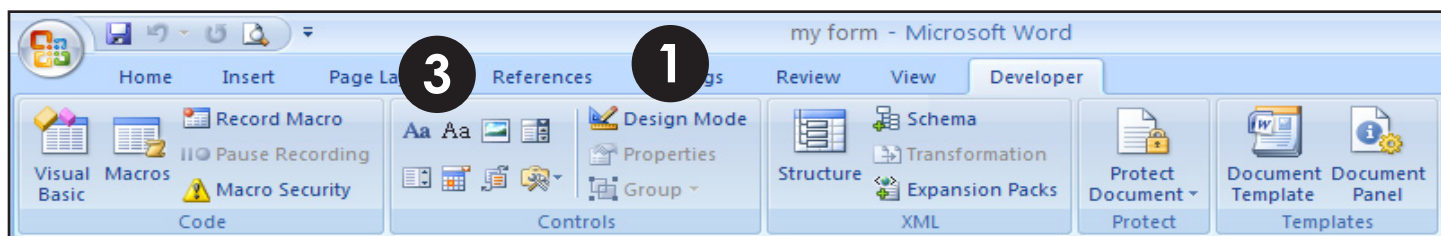
**Step 2: Open a template or a document on which to base the form.**

1. Click the **Microsoft Office Button**>**New**.
2. Under Templates, click **My templates**.
3. Single-click **Normal**.
4. Under Create New, click the button next to **Template**. Then click **OK**.



5. Click the **Microsoft Office Button>Save As.**
6. Access the desired location in **Save In.**
7. **Name** the Template. Then click **Save.**



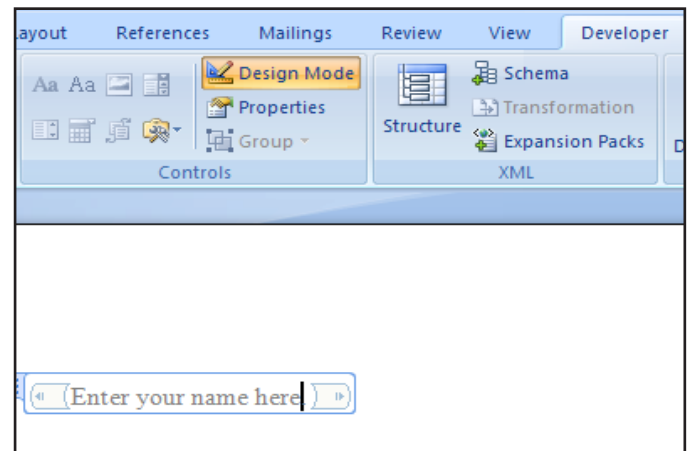
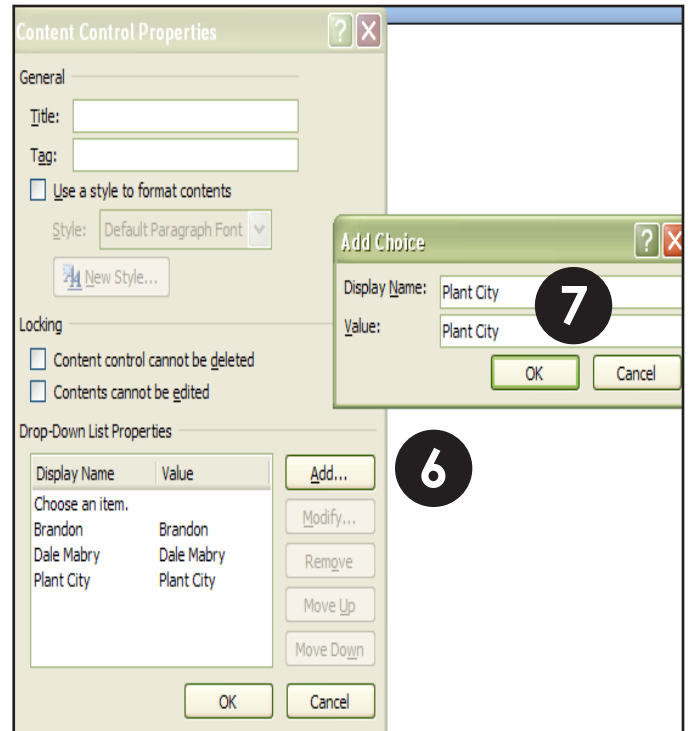


Design the form by sketching a layout first, or use an existing form as a guide. In your form, you can add content controls, tables, and other graphics elements. For our training purposes, we are going to practice using a blank Word document and the blank form template that you just created.

### Step 3: Add content controls to the form.

1. On the **Developer tab**, in the **Controls group**, click **Design Mode**.
2. Click the location in the document where you want the control inserted.
3. To insert a text control where users can enter text, click **Rich Text Control (Aa)** or **Text Control (Aa)**.

4. To insert a drop-down list that restricts available choices to those you specify, on the **Developer** tab, in the **Controls** group, click the **Drop-Down List** control.
5. From the **Developer** tab, in the **Controls** group, click **Properties**.
6. In the Properties dialog box, click **Add**.
7. Type the desired **Display Name**.
8. **Repeat steps 7 and 8** until all of the choices are in the drop-down list.
9. Click **OK**.

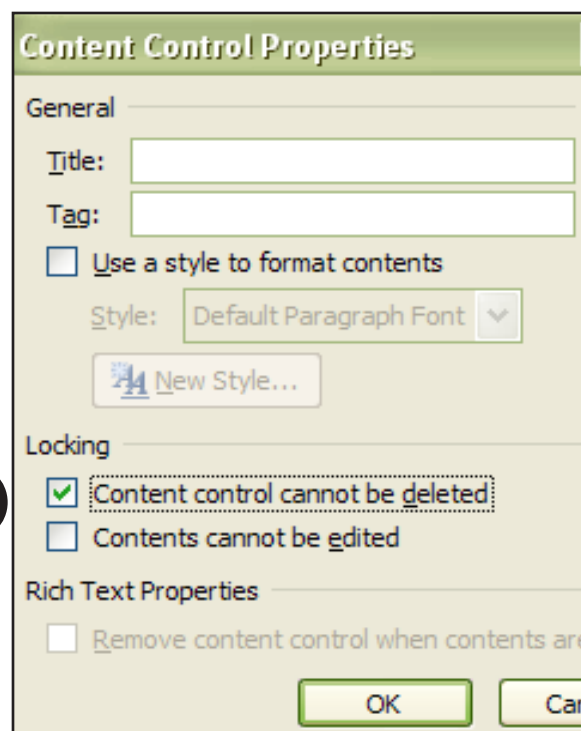


### To add protection to parts of the form:

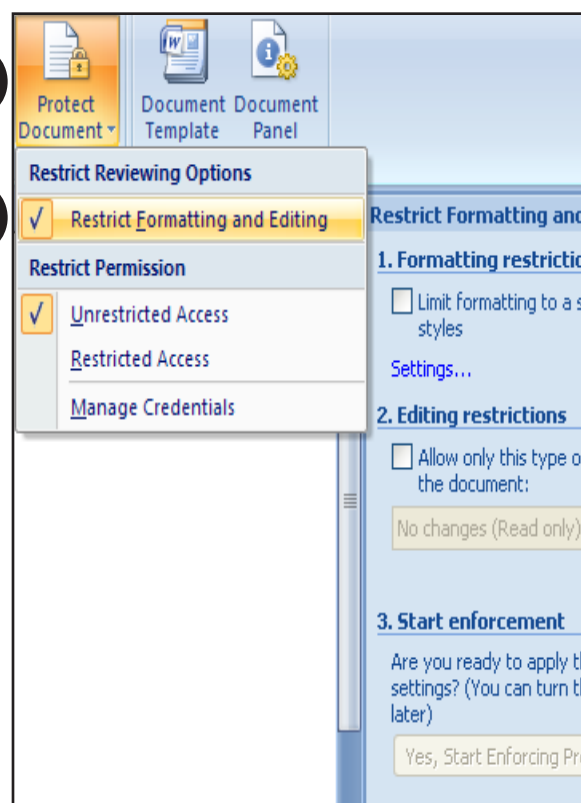
9. On the **Developer** tab, in the **Controls** group, click **Properties**.
10. In the Content Control Properties dialog box, **click the box** next to Content control cannot be deleted.

### To protect all of the contents of the form:

11. On the **Developer** tab, in the **Protect** group, click **Protect Document**.
12. Click **Restrict Formatting and Editing**.
13. Under Editing Restrictions, click the **box next to Allow only this . . . .** Then, click the **drop-down menu** to select the desired editing restriction.
14. Under Start Enforcement, click **Yes, Start Enforcing**.



10



11

12

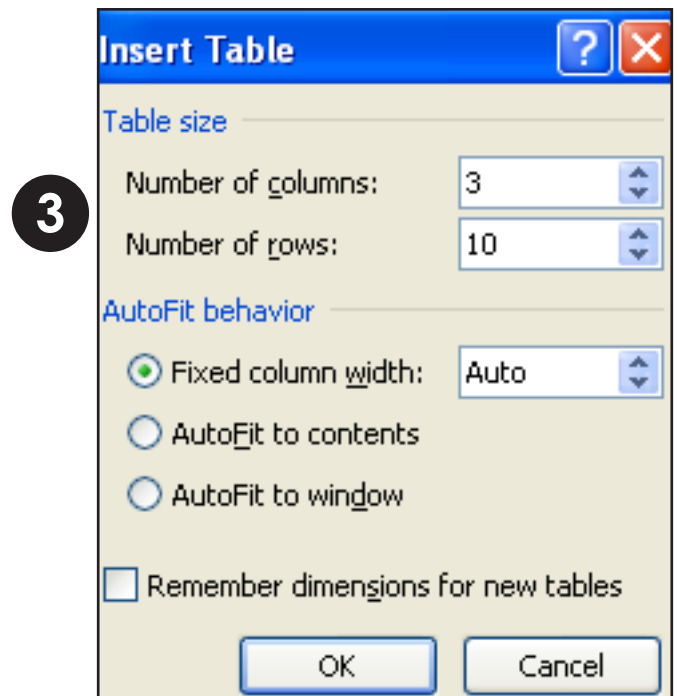
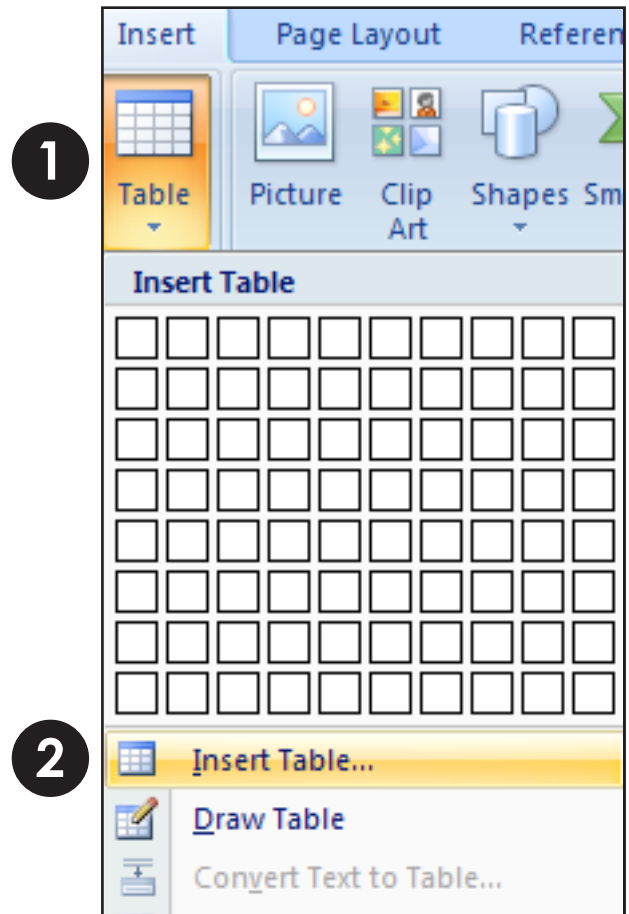
## Create a New Form

Obtain a copy of the form from your facilitator. Use the previous functions to re-create the form. **NOTE:** You may want to review the Table functions in the next section prior to beginning this activity.

## Using Tables in MS Word 2007

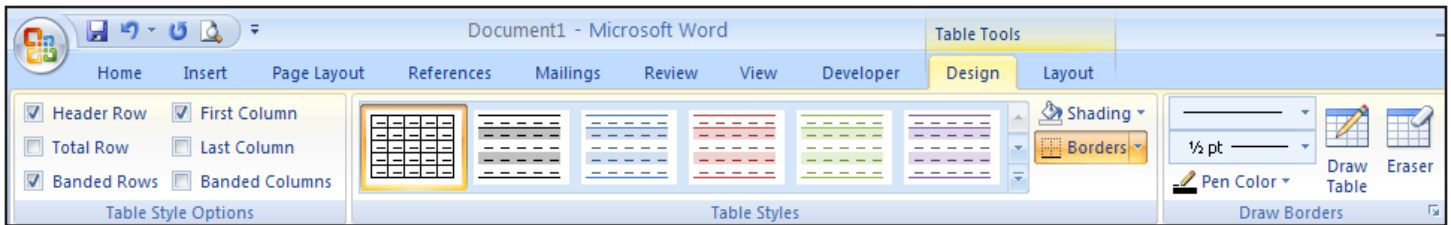
A **Word table** is a collection of rows and columns used for organizing information. The intersection of a row and a column is called a **cell**, and cells are filled with **text**.

1. On the **Insert** tab, in the **Tables** group, click **Table**.
2. Click **Insert Table**.
3. In the Insert Table dialog box, enter the number of columns, number of rows, and AutoFit behavior.

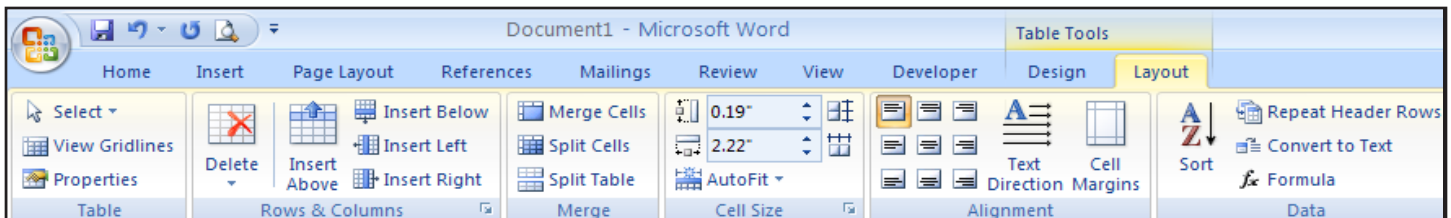




## Table Tools Design Ribbon



## Table Tools Layout Ribbon



### NOTE:

**We will use these two ribbons to complete the tasks on the next two pages.**

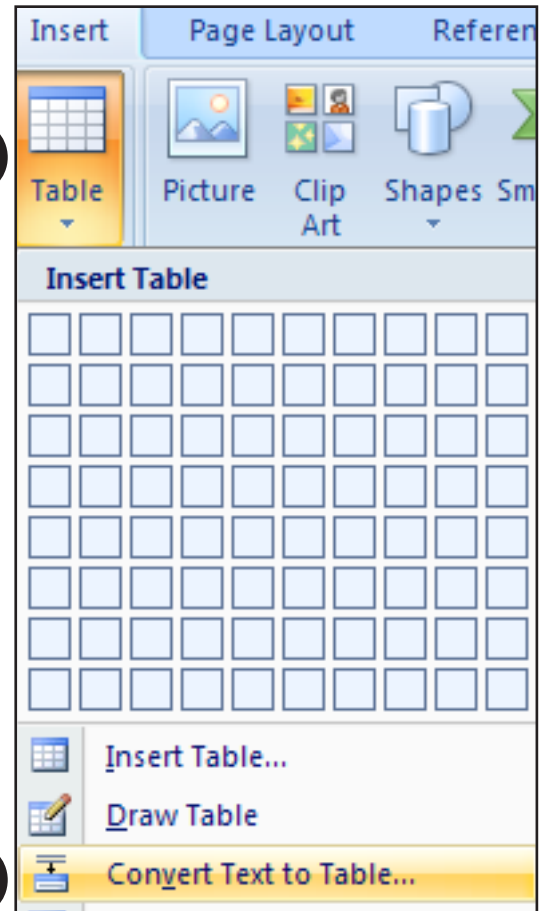
## Converting Text to a Table

1. Insert **separator characters** such as commas or tabs to indicate where you want to divide the text into columns. (Or, use paragraph marks to indicate where you want to begin a new row.)
2. On the **Insert** tab, in the **Tables** group, click **Table**.
3. Click **Convert Text to Table**.
4. In the Convert Text to Table dialog box, select the desired **number of columns and rows**.
5. Click the **Separator** option.

1

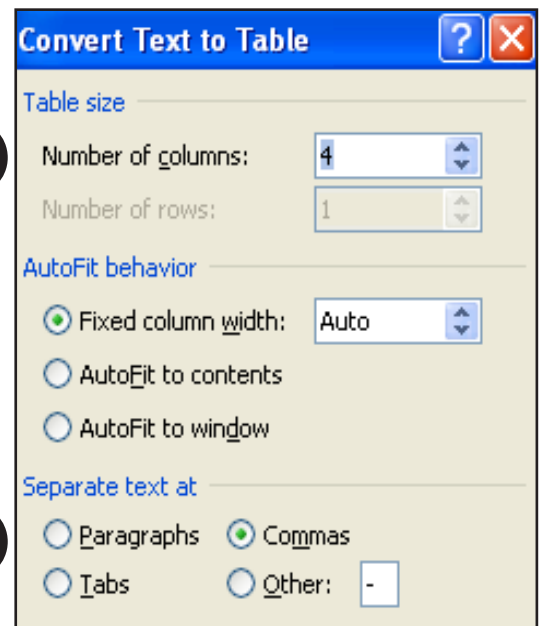
Name, Address, Telephone, Email

2



3

4



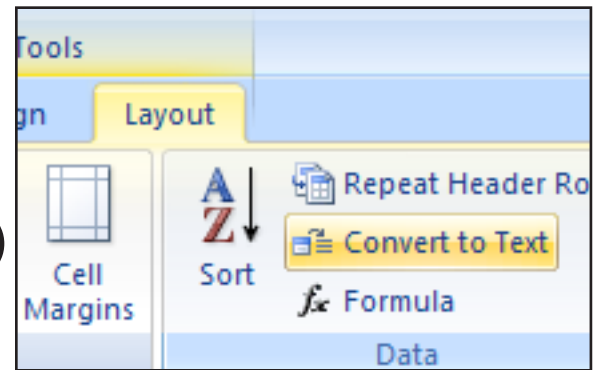
5

Name	Address	Telephone	Email
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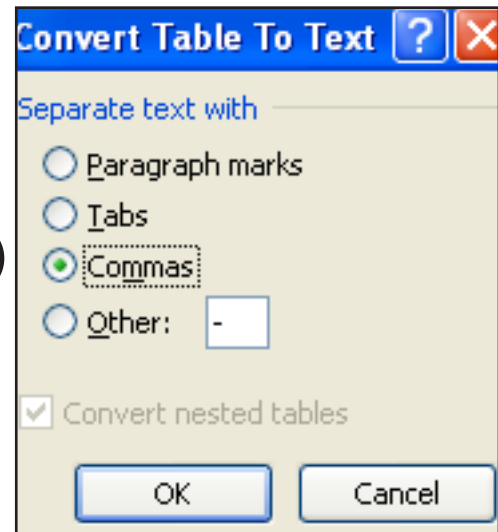
## Converting a Table to Text

1. Select the rows or table that you want to convert to paragraphs.
2. Under **Table Tools**, on the **Layout** tab, in the **Data** group, click **Convert to Text**.
3. In the Convert Table to Text dialog box, click the desired separator character. Then click **OK**.

2



3



Name, Address, Telephone, Email

## Table Tools Functions

Access the table provided by your facilitator. Use the **Table Tools design tab** and **layout tab** to merge cells, split cells, add a row, add a column, delete a row, delete a column, and sort a single column.

## Mail Merge

You use **mail merge** when you want to create a set of documents such as a form letter that is sent to many recipients or a sheet of address labels. Each letter or label has the same kind of information, yet the content is unique. The mail merge process entails the following overall steps:

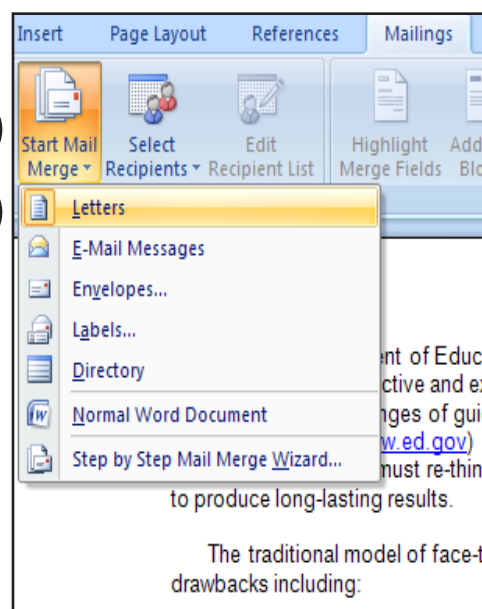
1. Set up the main document. The main document contains the text and graphics that are the same for each version of the merged document. For example, the return address or salutation in a form letter.
2. Connect the document to a data source. A data source is a file that contains the information to be merged into a document. For example, the names and addresses of the recipients of a letter.
3. Refine the list of recipients or items. Word generates a copy of the main document for each record in your data file. If your data file is a mailing list, a copy is generated for each person on your list. If you want to create a document for specified recipients, you can choose which recipients to include.
4. Add mail merge fields to the document. When you perform the mail merge, the mail merge fields are filled with information from your data file.
5. Preview and complete the merge. You can preview each copy of the document before you print the whole set.

The first step in setting up the mail merge is to create your letter or to use an existing letter. For our purposes we will use an existing letter.

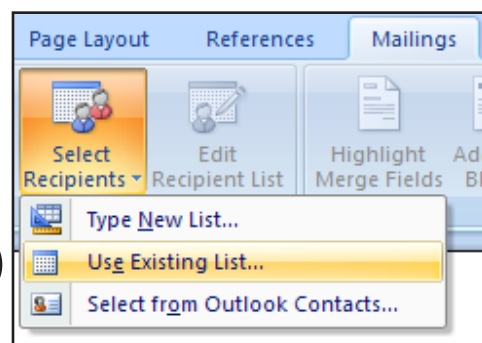
1. Open the existing letter provided by your facilitator.
2. On the **Mailings** tab, in the **Start Mail Merge** group, click **Start Mail Merge**.
3. Click **Letters**.
4. To connect your letter to a data source, click **Select Recipients>Use Existing List**.
5. Locate the folder that contains your data source. (In this example the data source file is an Excel document located in the Mail Merge folder on your desktop.) Click the data source **File>Open**.

2

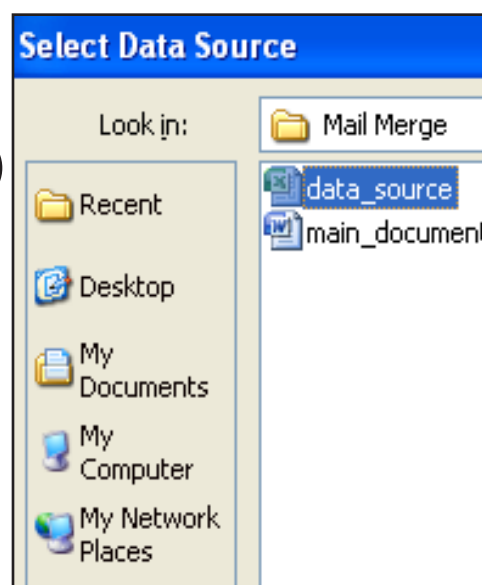
3



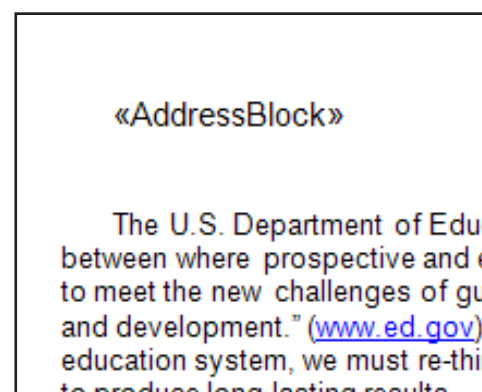
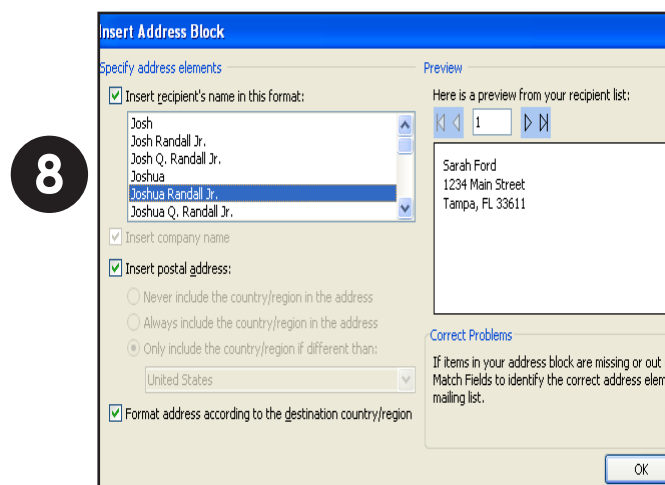
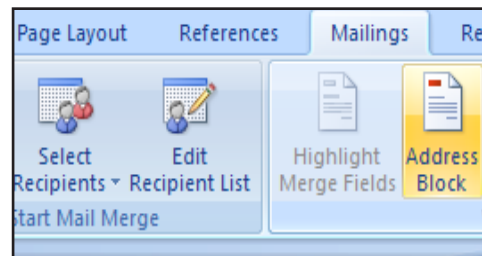
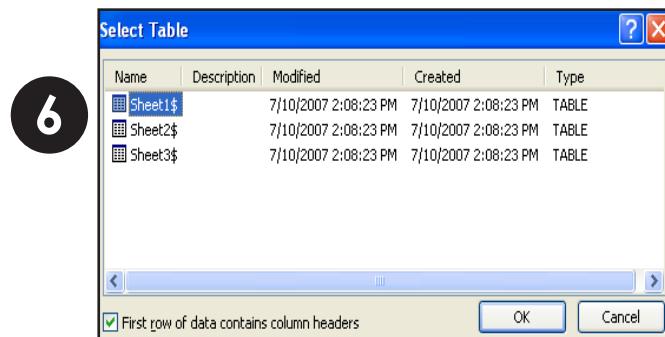
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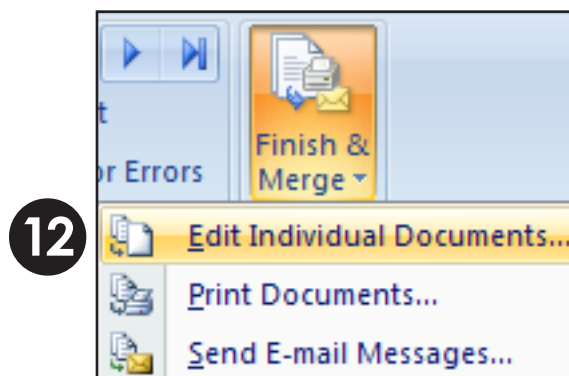
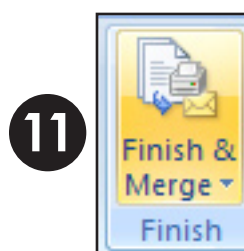
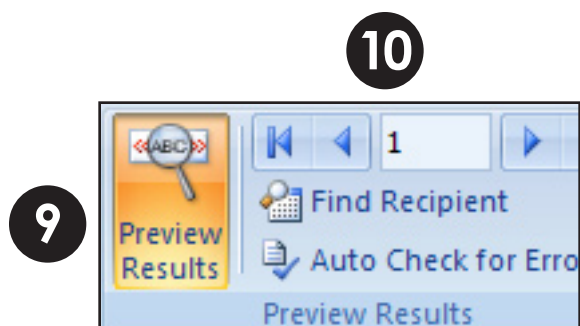


6. Click **Sheet 1>OK**.
7. To add content fields to your main document, from the **Mailings** tab, in the **Write & Insert Fields** group, click **Address Block**.
8. Choose the desired format for the recipient's name; click **Insert Postal Address**; preview the address block format in the preview window; click **OK**.



Once you have added the merge fields you are ready to preview the results.

9. From the **Mailings tab**, in the **Preview Results group**, click **Preview Results**.
10. Use the arrows to scroll through each page to confirm accuracy.
11. Click **Finish & Merge**.
12. Click **Edit Individual Documents**.
13. If you choose, you can scroll through each document prior to printing.



## Mail Merge

Use the new letter and new data source files provided by your facilitator to set-up a mail merge.

## **Final Activity**

Your facilitator has a variety of sample documents, flyers, brochures, etc. Select one of the samples and re-create it using Word functions that you have learned from the Word 1 and Word 2 training modules.