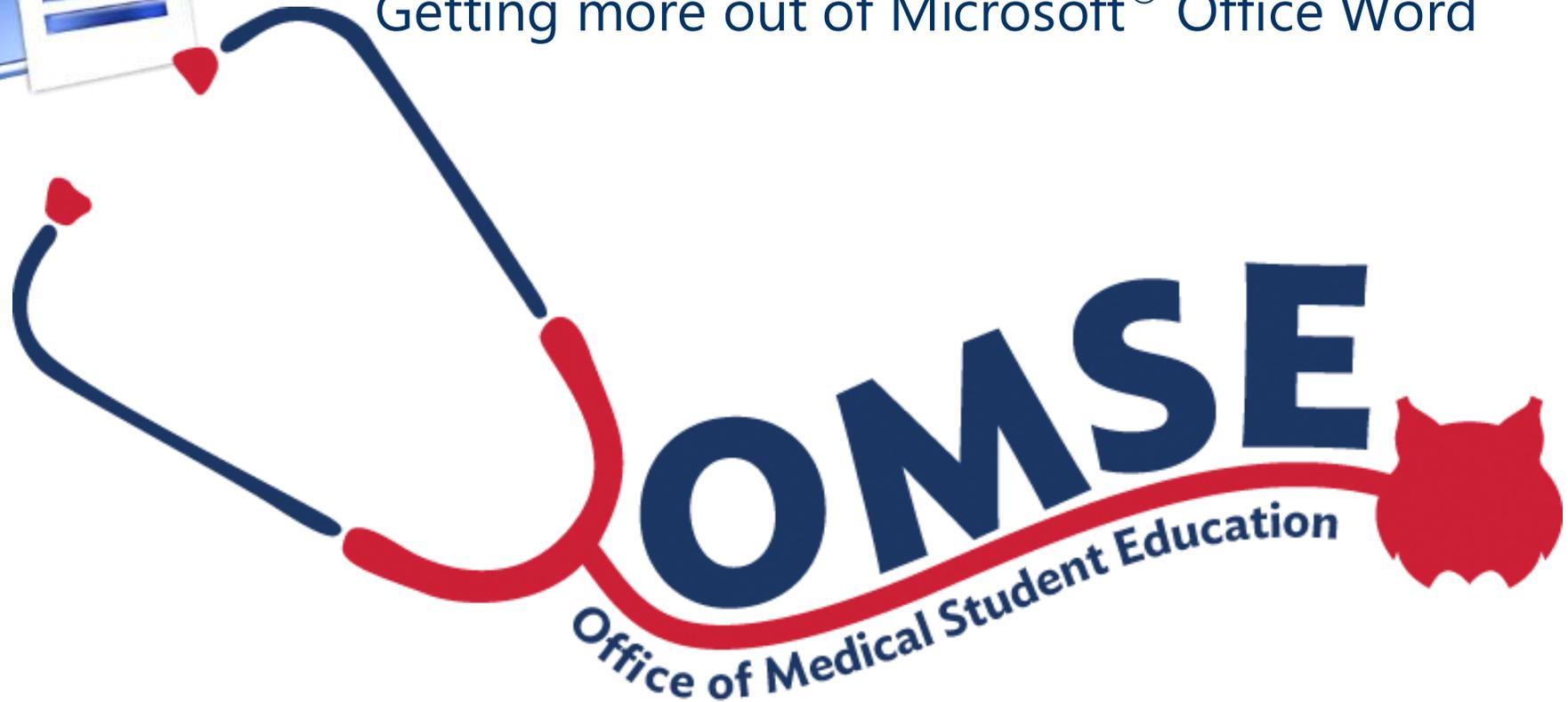




Materials for SOS Workshop No. 1 Getting more out of Microsoft® Office Word



SOS Workshop Series 2014
Materials in Support of SOS Workshop No. 1

Updated 3 March 2014

Prepared by Karen Spear Ellinwood, PhD, JD
Office of Medical Student Education Faculty instructional development

Click on any of the graphics below to view the guide on the topic.



Materials for SOS Workshop No. 1

Getting more out of Microsoft® Office Word



HOME
Tools for Preparing
Documents



Page Layout
Tools for Formatting
Documents



REVIEW
Tools for Self & Collaborative Editing



INSERT
Tools to Create/Insert
Graphics, Tables...



REFERENCES
Creating Tables & Indices



DEVELOPER
Creating Forms



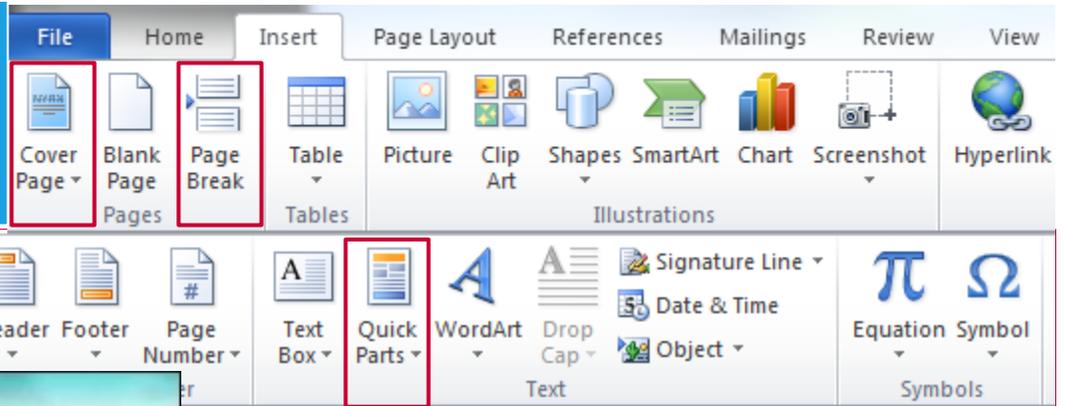
INTERFACING
with other
Applications & Devices

NOTE: I do not have Adobe Photoshop at work. Therefore, some of the graphics in this supplement are low resolution. In the interest of time, I included these, but apologize for the low quality. At some point, I will update this guide with higher resolution graphics.



INSERT

Tools to Create/Insert Graphics, Tables...



1) Cover Page

- Click it
- Select format
- Customize after insertion

2) Quick Parts

- Select Field
- Select category
- Select format
- Click OK

3) Page Break (Click it)

1

2

3

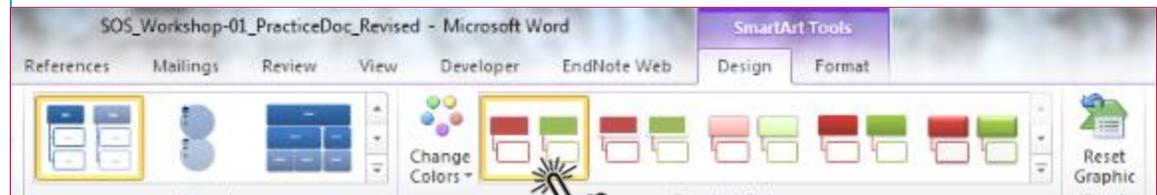
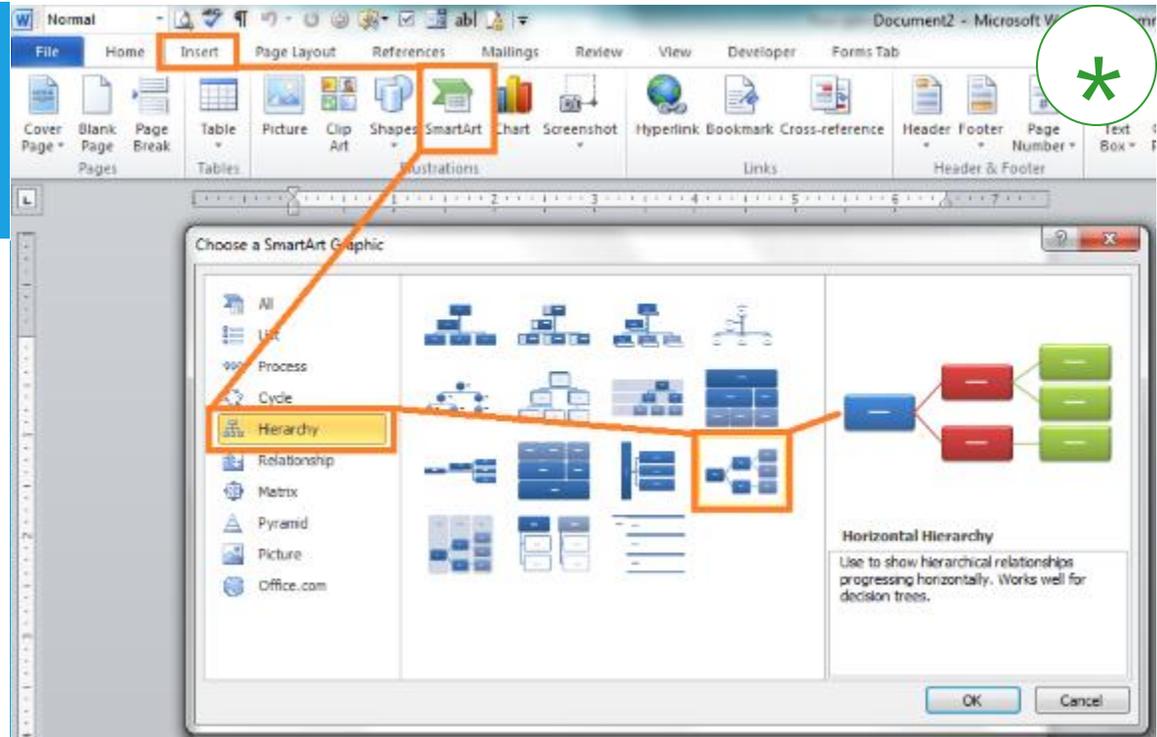


INSERT Tools to Create/Insert Graphics, Tables...

4) Smart Art

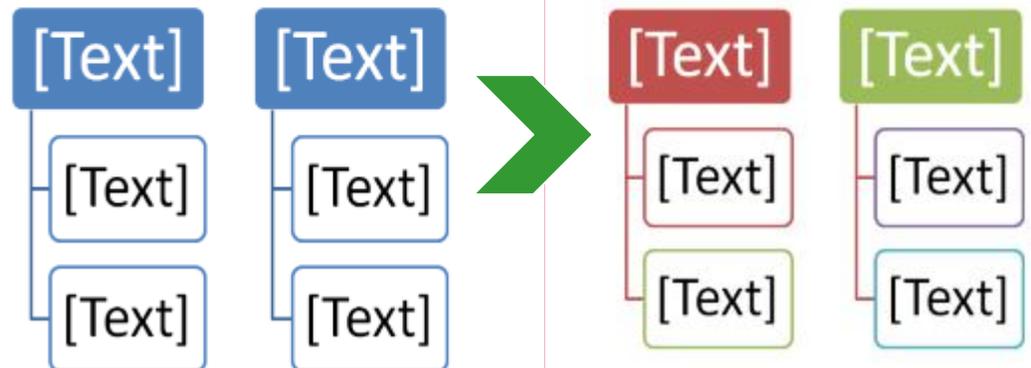
- Click on icon
- Choose graphic category based on what type of concept or information you want to represent (process, list, etc.)
- Click OK
- Default color and “effects” will be inserted.
- To change color & effects, make sure you select the Smart Art graphic with your mouse by clicking on the edge or inside the “box”.
- Then, the Smart Art menu will appear on the menu bar.
- Choose color schemes and effects from that menu.

*Source of graphic: [Technology Tamers Blogspot](#)



Sample Default Color & Effect

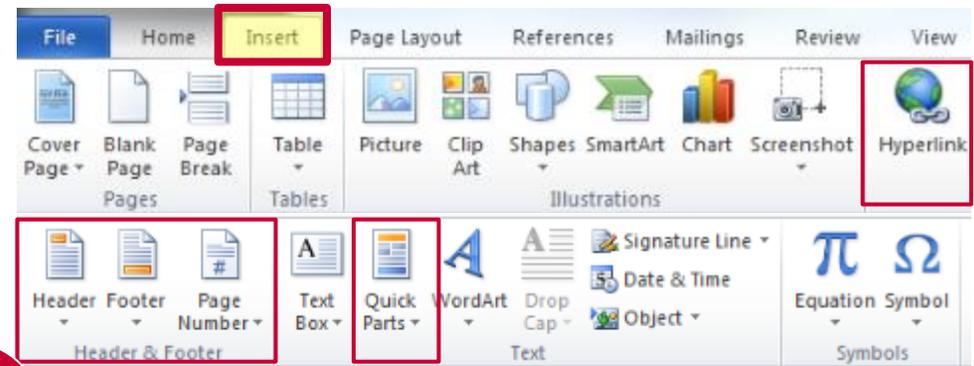
Example of Color Change





INSERT

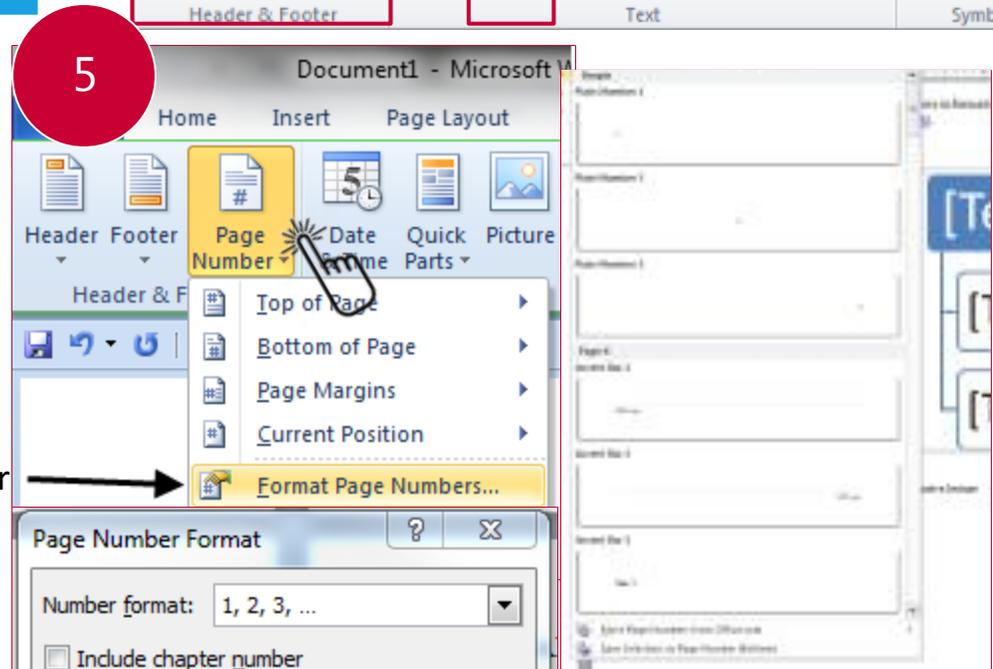
Tools to Create/Insert Graphics, Tables...



5) Page Numbers

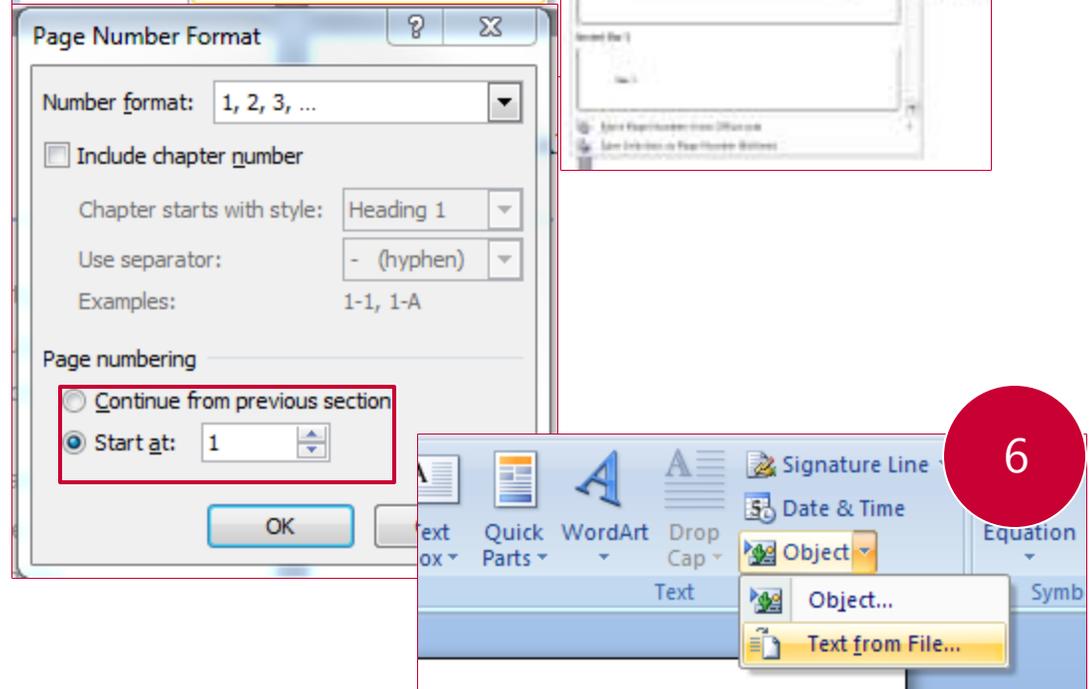
- Click on INSERT menu
- Click on Page Numbers
- Select where you want to place the page numbers
- Select format
- You can modify format after insertion using Page Number Format pop-up menu.

[Click here for more detail on how to insert non-standard page numbers](#)



6) Object à FILE

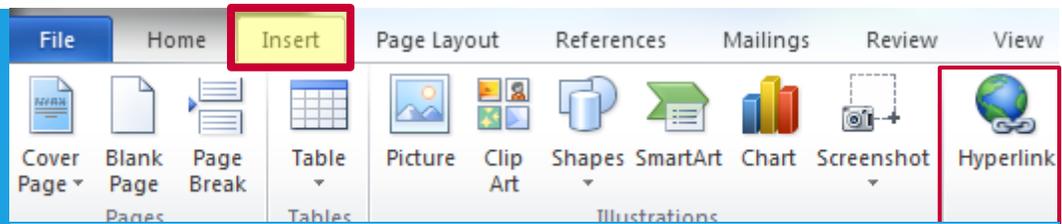
- Click on INSERT menu
- Click on Object
- Select "Text from file"
- Windows browser window pops up – select file
- Click OK





INSERT

Tools to Create/Insert Graphics, Tables...



8) Hyperlink (CTRL + K)

- Select the text you want to hyperlink.
- Click on INSERT, then click on Hyperlink – OR, Use keyboard function CNTRL + K (hold down at same time).
- INSERT HYPERLINK window pops up
- Use function key, CNTRL + V (Paste function) to paste the web address in the ADDRESS bar.
- Click on Target Frame, select NEW WINDOW.
- Click OK, and OK again.
- **NOTE:** You can link to web addresses you've already visited by clicking on Browsed pages.

For creating hyperlinks to places in the document OR an email

The instructions are the same as those at left, except-

- Select type of hyperlink in the "Link to:" column at far left.
- Then select the place in the document you want or type the email and Subject Line.
- Places in the document follow the heading styles you have marked. Another good reason to do that J
- Click OK.
- **NOTE:** You can create bookmarks in your document that you prefer not to mark as headings by going to the INSERT menu, click on Bookmark. Then these bookmarks will appear in the CNTRL + K pop up menu.

minwood, PhD, JD, develops the curriculum for the program worksh...
ars activities with program faculty and FID Series seminars. In the final months of the...
ning scholars participants report findings from...
f the AMES/OMSE FID Series and present p...
earch Day, directed by Celia O'Brien, PhD, D...
for the Teaching Scholars program is at...
op Series (Support for Office Staff)
provides workshops for faculty to learn how...
cal Student Education. Amy Lynn Waer, MD, ...
staff to support them as they support our fac...
goal of the SOS Workshop Series is to provid...
unctionality of the software they use every da...

Insert Hyperlink

Link to: Existing File or Web Page | Text to display: Teaching Scholars program | ScreenTip...

Look in: Workshops | Current Folder | SOS_2014-01_CheatSheet_KSpearEllinwood | SOS_2014-01_KSpearEllinwood | SOS_Workshop-01_PracticeDoc | SOS_Workshop-01_PracticeDoc_Instructor | SOS_Workshop-01_PracticeDoc_Revised | Bookmark... | Target Frame...

Address: Http://fid.medicine.arizona.edu/teaching-scholars/home | OK | Cancel



INSERT

Tools to Create/Insert Graphics, Tables...

9) Headers and Footers

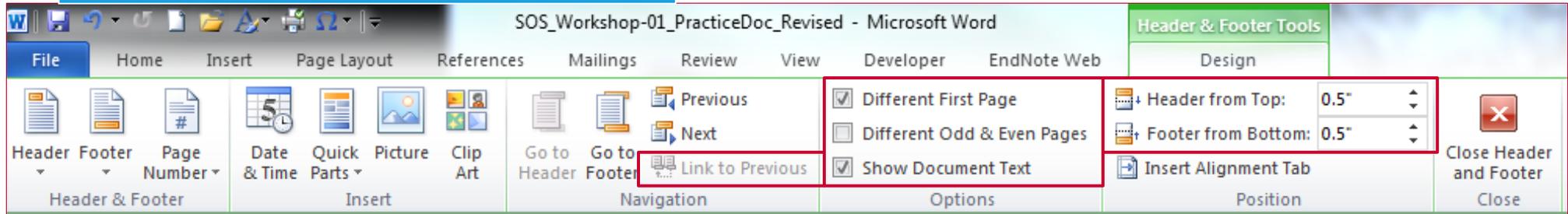
- To access header or footer, double-click on the space where the header and footer are/ought to be, OR, go to INSERT menu and click on Header or Footer.
- Select placement and format of header, much like you do with Page Numbers.
- Once you click OK, you'll be taken to the header or footer and can enter the text you would like.
- Remember you can use Quick Parts here to insert automatic field values like the document path (folder/file), creation or publication date, author name, date and so on.
- **NOTE:** An automatically updated DATE is good to use when you are noting in the footer, for example, Last updated: DATE. This way every time you revise that document, the date is automatically updated and everyone knows when it was last revised.

* Source of graphic: GCF Learn Free

The screenshot shows the Microsoft Word ribbon with the 'Insert' tab selected. The 'Header & Footer' group is highlighted with a red box. Below the ribbon, the 'Header & Footer' task pane is open, showing a preview of a document header and footer. The 'Titles' section is highlighted with a yellow box, and a tooltip is visible over it. The tooltip text reads: 'Titles: Title and date inside colored tiles'. The preview shows a header with a title field and a year field, and a footer with a title field and a date field. The 'More Headers from Office.com' section is also visible at the bottom of the task pane.



INSERT Tools to Create/Insert Graphics, Tables...



Basic Stuff

- Once you insert your header or footer, you can change the behavior of these.
- For example, click on the header or footer and the Header & Footer Tools menu appears.
- Think of formatting as the navigation device of a document. Formatting should tell the reader where they are and where they're going.
- In a HEADER, for example, you can click on "Different First Page" or "Different Odd & Even Pages". If these features are not important to your reader, then be sure they are not selected.
- You can move the header or footer placement by changing the number of inches from the edge of the paper it will appear. 0.5" is standard and should be maintained, unless there is a reason not to do so.
- Notice that on the Header & Footer Tools menu there also appear other icons from the INSERT menu, such as Quick Parts, Date & Time, Clip Art, Picture and Page Number.
- This is to make it easier to do all these things within the Header or Footer without having to navigate to the INSERT menu.
- The options for each of these is the same as it is on the INSERT menu.



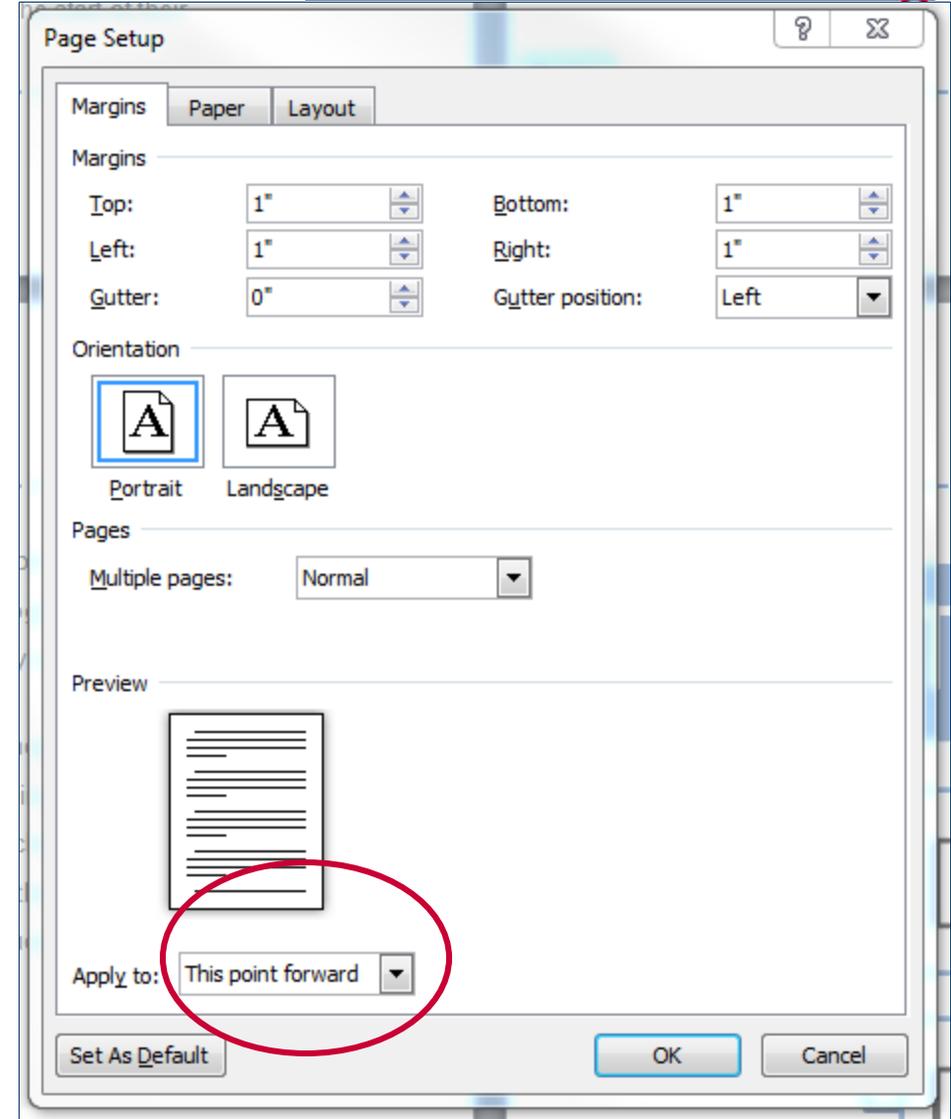
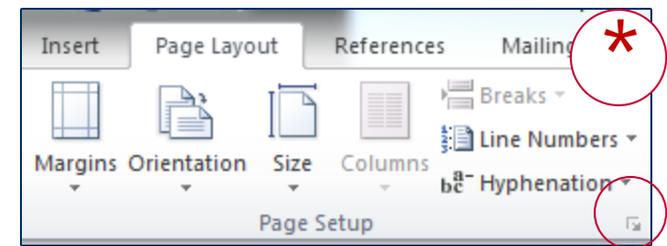
INSERT

Tools to Create/Insert Graphics, Tables...

Fancy Footer work with Page Numbering

If you want to make sure that page numbering starts on the first page of text in the document and NOT on the cover page or the Table of Contents, click on the header of the first page of text.

- Then go to the PAGE LAYOUT menu (*see image above).
- Click on the lower RIGHT-hand corner pullout arrow icon.
- Page Layout menu pops up
- Select “This point forward”
- Click OK
- At this point, you will be returned to your header. Your header text that had been there will be gone, because you’ve just told Word that you want to create a new header from this point forward.
- Now you can INSERT Page numbers from the Header & Footer Tools or INSERT Page Numbers menu.
- Be sure to go to Page Numbers – Format, and tell Word you want page numbers to start at “1”.



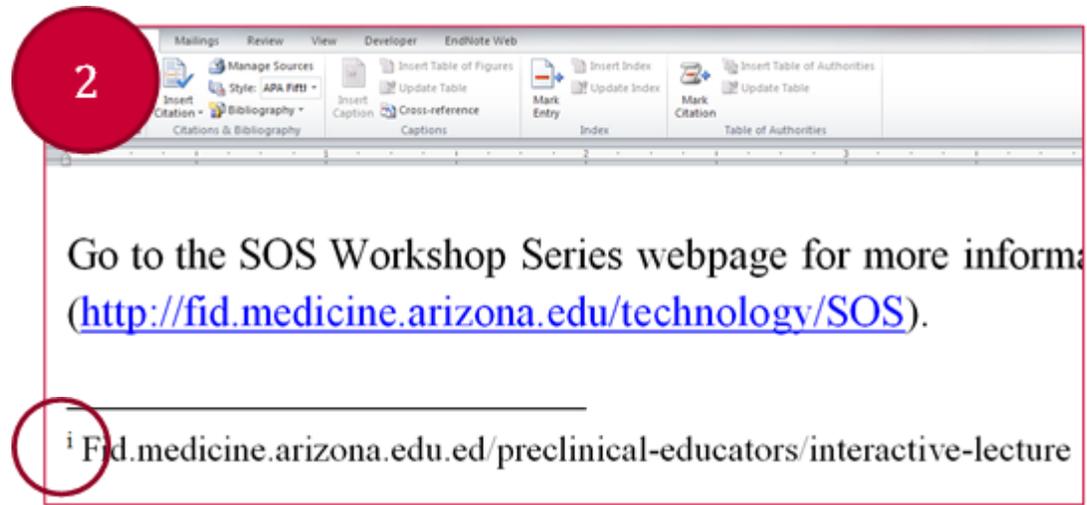
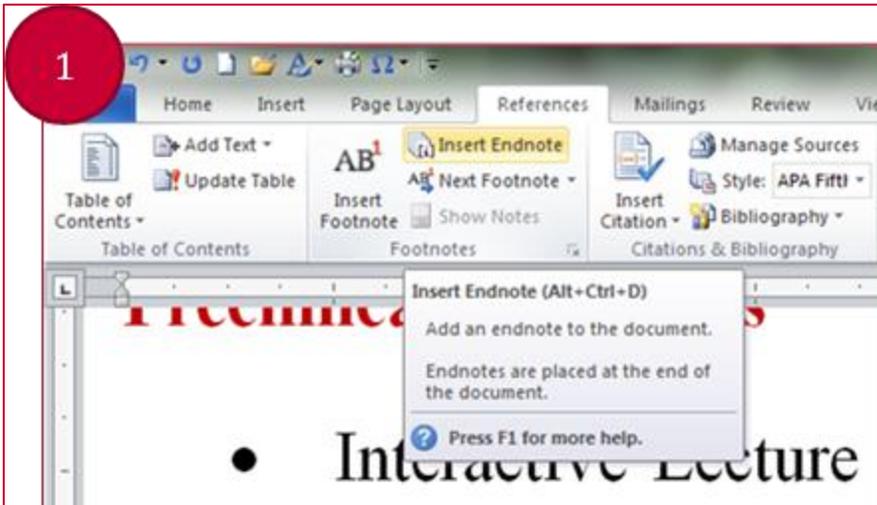
[Click to Return to Page Numbers Guide](#)



INSERT

Tools to Create/Insert Graphics,
Tables...

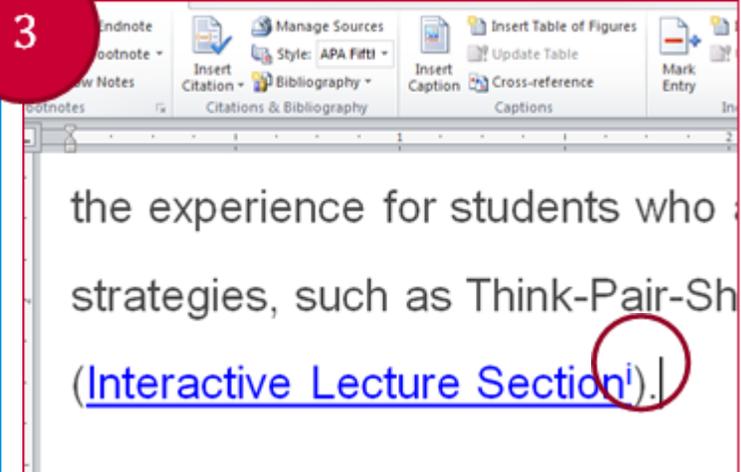
Auto-numbered Endnotes



1) When you click Insert Endnote you are brought to the end of the document to write the endnote. In our example you would paste the complete web address of the hyperlinked text.

2) If you double-click on the endnote # at the left margin, it will return you to where you were in the text when you inserted the endnote.

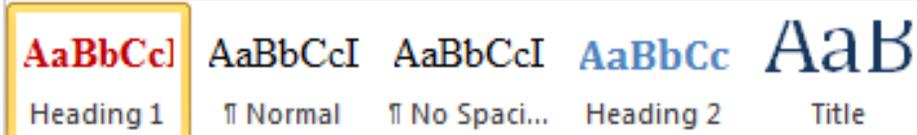
3) If you click on the Endnote # in the text, it will take you to the endnote.





REFERENCES

Creating Tables & Indices



1) On the HOME menu, mark Styles for inclusion in tables of:

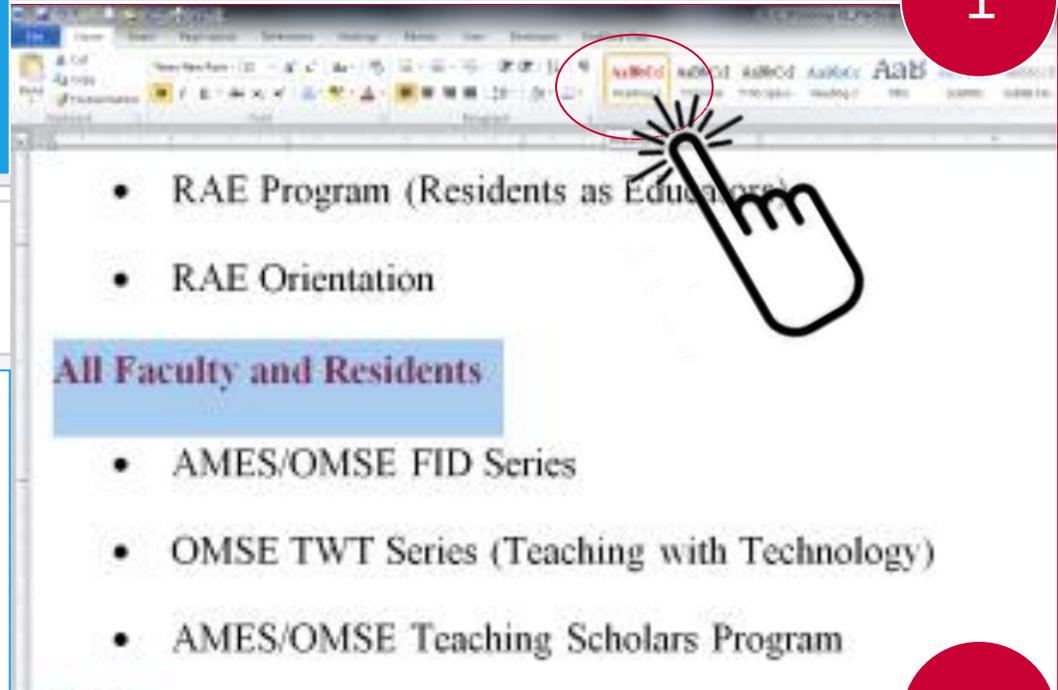
- Contents
- Figures
- References

2) Once text is marked, go to REFERENCES and click on one of the following:

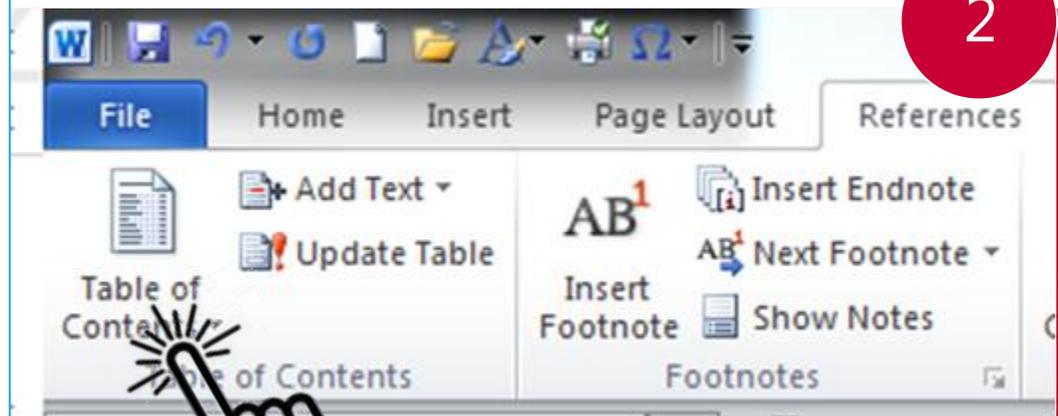
- Table of contents
- Document index
- Table of figures

Table of Contents

1



2



[Click here to go to the Guide for marking styles using the HOME menu.](#)



REFERENCES

Creating Tables & Indices

Table of Contents

3

3) Choose a "Built-In" - Automatic Table

Automatic Tables are best because:

- They automatically include the top 3 marked headings in the document – default is Heading1, Heading2, and Heading3, without you having to do anything;
- They update page numbers automatically as the document changes;
- The numbers in the Table of Contents are hyperlinks to where the content is in the document (CTRL + Click to follow link); and
- You don't have to copy and paste headings or subheadings and manually update page numbers as the document is revised.
- It takes 3 seconds or less to generate the Table of Contents.

4) You may customize the Table of Contents

For those who want to customize the Table of Contents, click on Insert Table of Contents below the "Built-In" templates.

File Home Insert Page Layout **References** Mailing

Table of Contents Add Text Update Table Insert Footnote Insert Endnote Next Footnote Show Notes Insert Citation

Built-In

Automatic Table 1

Contents

Heading 1 1

Heading 2 1

Heading 3 1

Automatic Table 3

Table of Contents

Heading 1 1

Heading 2 1

Heading 3 1

Manual Table

Table of Contents

Type chapter title (level 1) 1

Type chapter title (level 2) 2

Type chapter title (level 3) 3

Type chapter title (level 1) 4

More Table of Contents from Office.com

Insert Table of Contents...

Remove Table of Contents

Save Selection to Table of Contents Gallery...

4



REFERENCES

Creating Tables & Indices

Table of Contents

5) Select Formatting

- Choose from among pre-formatted options by clicking on Formats on bottom left under the "General" section of the TOC window.
- Modify pre-formatted options by changing the "Tab leader"
- Change the number of levels of headings that automatically appear in the table of contents from the default 3 to 1 or 2 or more than 3.

6) Select Options

- Identify the styles that you want to be included in the table by clicking on Options.
- Type the number in the TOC Level column next to the Style you want to include that indicates the level and order in which you want these styles to appear in the table of contents.
- For example, you could mark Heading 2 as "1", Heading 3 as "2" and so on.

Table of Contents

Index Table of Contents Table of Figures Table of Authorities

Print Preview

HEADING 1	1
HEADING 2	3
HEADING 3	5

Web Preview

HEADING 1

HEADING 2

HEADING 3

Show page numbers

Right align page numbers

Tab leader: []

General

Formats: Fancy

Show levels: 3

Options... Modify...

OK Cancel

6

Table of Contents Options

Build table of contents from:

Styles

Available styles:	TOC level:
<input checked="" type="checkbox"/> Heading 1	1
<input checked="" type="checkbox"/> Heading 2	2
<input checked="" type="checkbox"/> Heading 3	3
Heading 4	
Heading 5	
Heading 6	

Outline levels

Table entry fields

Reset OK Cancel



REFERENCES

Creating Tables & Indices

7) Update your Table

Now that you have marked your headings, generated your Table of Contents, and customized your settings, you can update your TOC using the following steps:

- **Return** to the Table of Contents you inserted and place your cursor anywhere inside the table. The developer bar "Update Table..." will appear.
- **LEFT click** on the gray bar and select one of the 2 following options: (1) update page numbers only; or (2) update entire table.
 - **Update page numbers only** when you know that the table of contents reflects all the headings and subheadings in your document but all you need to do is update the page numbers.
 - **Update the ENTIRE table** when you have added content to your document that had new headings or subheadings or changed the markings of heading styles.
- **Click OK.**

Voila! Your reformatted Table of Contents appears where the original one had been.

Table of Contents

Update Table of Contents

Word is updating the table of contents. Select one of the following options:

- Update page numbers only
- Update entire table

OK Cancel

Table of Contents	
INTRODUCTION	2
CONTACT INFORMATION	2
PRECLINICAL EDUCATORS	3
INTERACTIVE LECTURE	3
TEAM LEARNING	3
CASE-BASED INSTRUCTION (CBI)	3
CLINICAL EDUCATORS	4
ACE PROGRAM (AFFILIATE CLINICAL EDUCATORS)	4
RAE PROGRAM (RESIDENTS AS EDUCATORS)	4
RAE ORIENTATION	5
ALL FACULTY AND RESIDENTS	5
AMES/OMSE FID SERIES	5
OMSE TWT SERIES (TEACHING WITH TECHNOLOGY)	5
AMES/OMSE TEACHING SCHOLARS PROGRAM	6
STAFF	6
SOS WORKSHOP SERIES (SUPPORT FOR OFFICE STAFF)	6



HOME

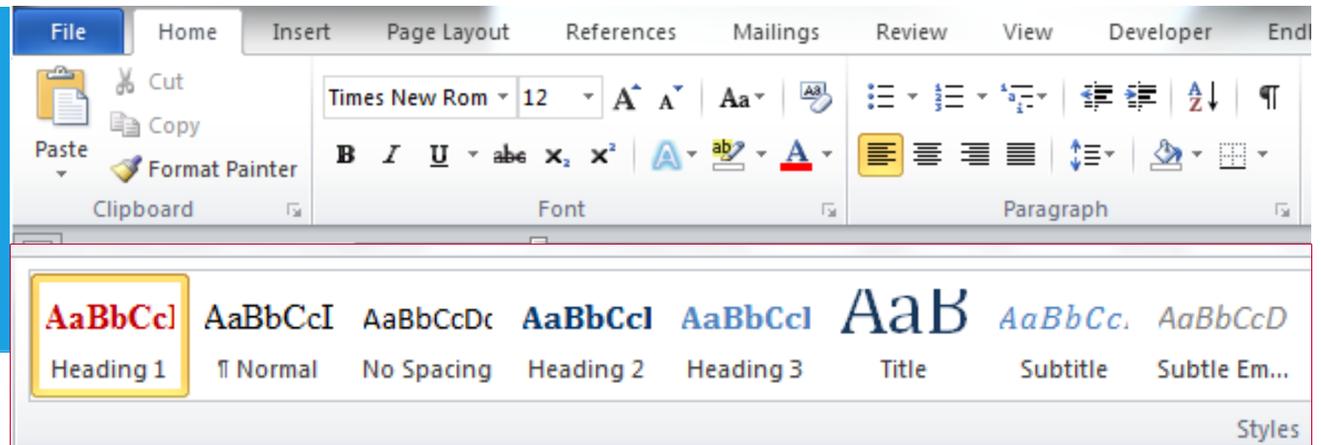
Tools for Preparing Documents

The **HOME** menu has all the basic text and paragraph formatting tools, copy, paste, cut and Format Painter (your friend).

In addition, the HOME menu allows you to mark text as “styles”, such as Title, Heading1, Heading2, Indented Quote, etc.

When you mark text as a style, it may be included in the Tables of Contents, Figures & References.

You can also **MODIFY** styles (next page).



NOTE: Whenever you create documents, set your NORMAL style to the font and paragraph styles you prefer. Any text specifically marked normal or any text that was entered without specially marking it something other than NORMAL will automatically be updated to reflect your style selections.

You will save yourself time and effort by **NORMALIZING** errors in style formatting. Avoid manual changes to text. If you have to highlight specific text, use the NORMAL (or other appropriate style) selection to correct formatting.

Go to the Guide for creating Table of Contents on the REFERENCES menu



HOME

Tools for Preparing Documents

To Modify Styles:

- Right click on the style icon.
- Select MODIFY
- Use the basic formatting in the pop-up window or the more advanced formatting features by clicking on the bottom left button FORMAT.
- Click OK when done.

The screenshot shows the Microsoft Word interface with the 'Modify Style' dialog box open for the 'Heading 1' style. The dialog box is divided into several sections:

- Properties:** Name: Heading 1, Style type: Linked (paragraph and character), Style based on: Normal, Style for following paragraph: Normal.
- Formatting:** A red box highlights this section, which includes font settings (Times New Roman, size 12), bold (B), italic (I), underline (U), and a color selection dropdown (Dark Red).
- Preview:** Shows a preview of the 'Staff' heading in the selected style.
- Font and Paragraph Settings:** Font: Bold, Font color: Dark Red, Space; Before: 12 pt; After: 12 pt, Keep with next, Keep lines together, Level 1, Style: Linked, Automatically update, Quick Style.
- Options:** Checkboxes for 'Add to Quick Style list' and 'Automatically update' are checked. Radio buttons for 'Only in this document' (selected) and 'New documents based on this template' are visible.
- Buttons:** 'Format' (with a dropdown arrow), 'OK', and 'Cancel' buttons are at the bottom.

In the background, a context menu is open over the 'Heading 1' style icon, with 'Modify...' selected. The menu also includes options like 'Update Heading 1 to Match Selection', 'Select All: (No Data)', 'Rename...', 'Remove from Quick Style Gallery', and 'Add Gallery to Quick Access Toolbar'.

You can modify styles and create new styles, add them to the document you're working on OR make them available when working on NEW documents.

This means that once you mark text as a style, even if you've marked 100 headings in your document, you need only MODIFY the style to change every single heading. It's efficient and easy.

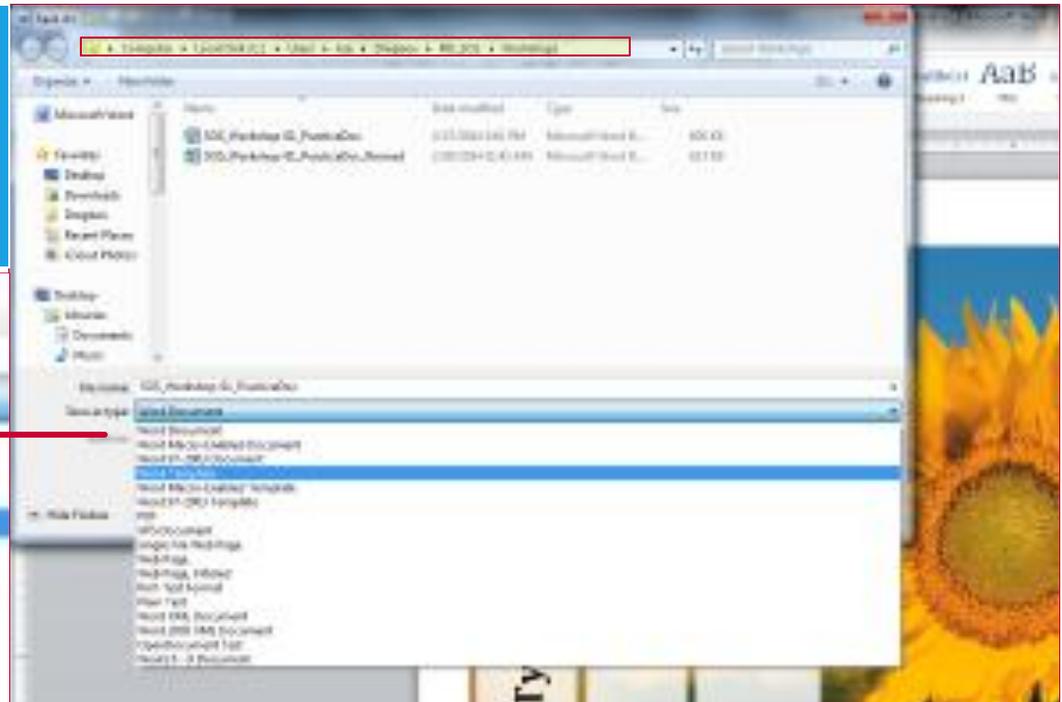
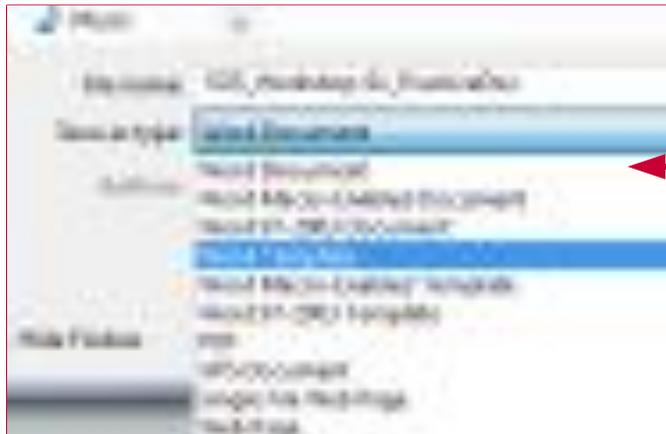
To Create a New Style or Clear formatting

- Click on the Down Arrow on the far right Scroll bar of the Styles sub-menu.
- The menu will drop down to allow you to CLEAR FORMATTING STYLES, SAVE SELECTION AS NEW QUICK STYLE, or APPLY STYLES.



HOME

Tools for Preparing Documents



To make a template from an existing document:

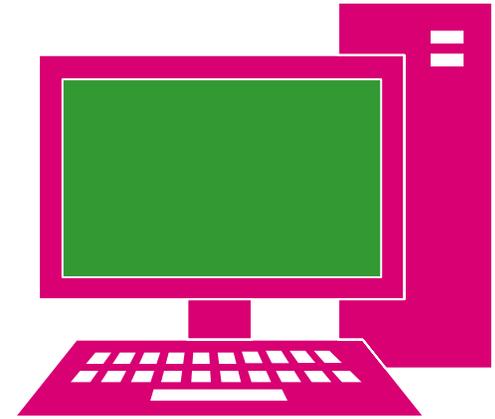
- 1) Open the document;
- 2) FILE
- 3) SAVE AS – In this pop-up window, name the file how you want the template to be named, and select SAVE AS TYPE [File Type] “Word Template”

NOTE:

- Make sure you are saving the template to the right folder. You could create a folder called TEMPLATES.
- Most work computers will not allow you to save templates to the Microsoft Office template folder on Drive C (the hard drive). But you can try it as this would allow you to use the NEW DOCUMENT or CNTRL + N function and choose from “My Templates”.
- The difference is, if you open a document you saved as a template, you need to remember to SAVE AS “Word Document” (.doc, .docx) to preserve your template. When you save templates to the Microsoft Office Template folder, the template opens as a new document and changes you make will not affect the template.

SPEAKING THEIR LANGUAGE

Useful Function Keys & Codes



Function Keys within MS applications

Hold down the CNTRL key AND...

- C = COPY
- F = FIND
- L = LEFT JUSTIFIED MARGIN
- N = CREATE NEW DOCUMENT (ANY MICROSOFT APPLICATION)
- O = OPEN DOCUMENT
- R = RIGHT JUSTIFIED MARGIN
- S = SAVE
- T = TAB
- V = PASTE
- Z = Undo

Function Keys within Web Browser

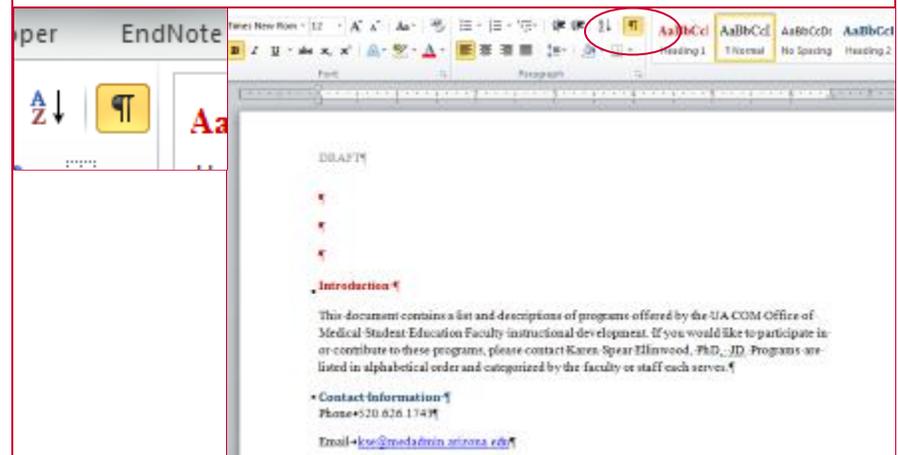
CNTRL + T = OPEN NEW TAB

CNTRL + R = REFRESH (Also F5 on keyboard)



Reveal Codes

Click Paragraph Mark on HOME menu to reveal basic codes, such as paragraph breaks and page breaks.



Free Help Online

There are many places online to seek help with Word functionality.

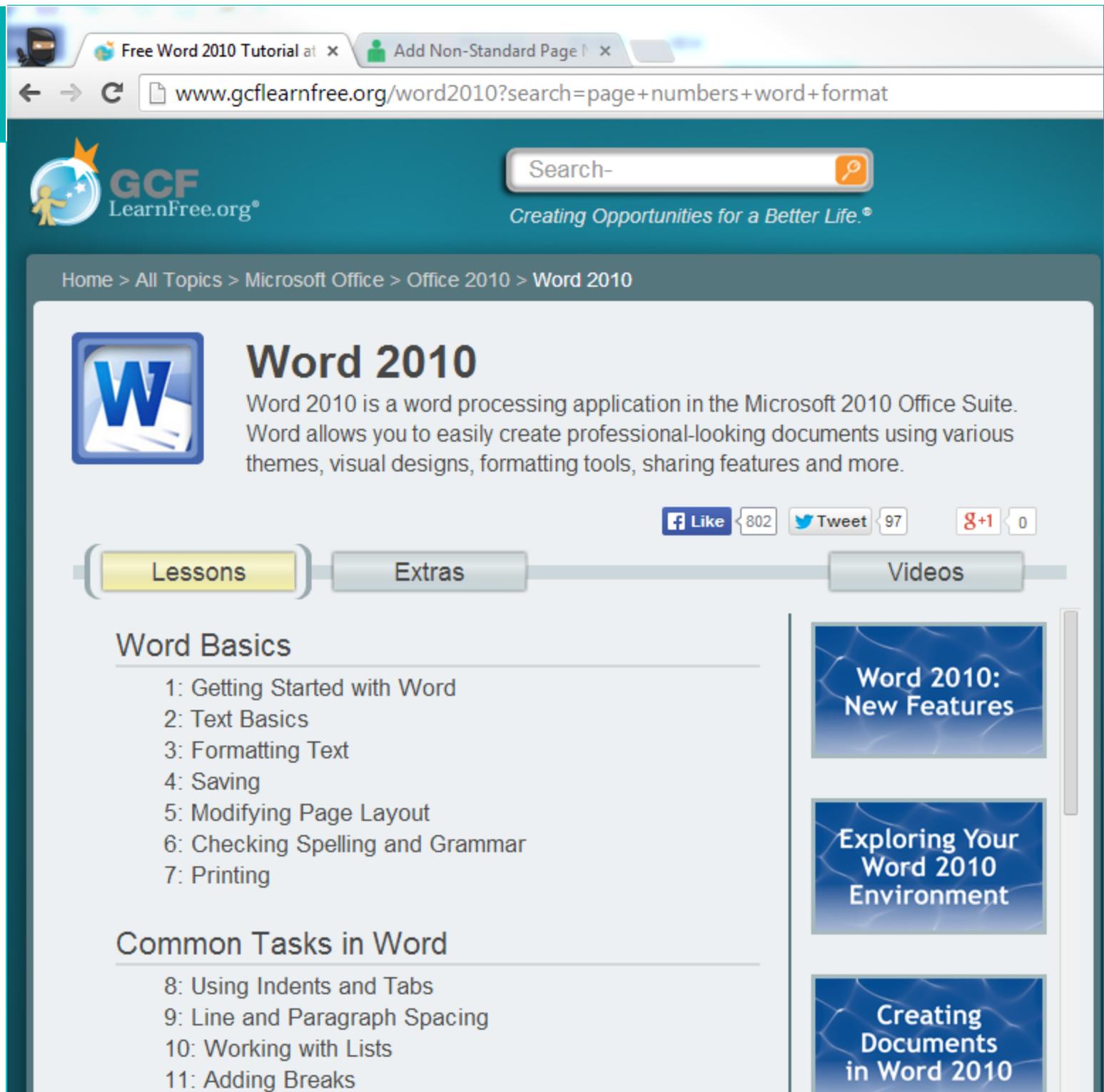
In addition to the UITS website and the Microsoft online tutorials free through the UA, there is the GCF Learn Free website.

It has basic information with screenshots to walk you through the tasks.

And, you can always ask someone in the SOS Network or me.

Good luck and have fun.
PRACTICE. PRACTICE.
PRACTICE.

EXPLORE the many other features we haven't covered.



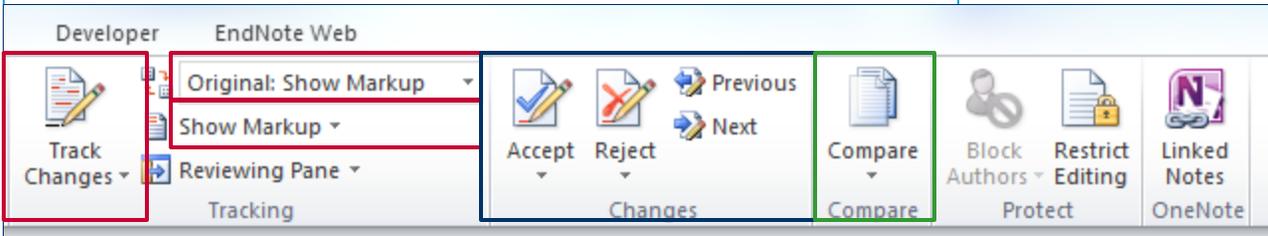
The screenshot shows a web browser window with two tabs: "Free Word 2010 Tutorial at ..." and "Add Non-Standard Page ...". The address bar shows the URL: www.gcflearnfree.org/word2010?search=page+numbers+word+format. The website header features the GCF LearnFree.org logo and the tagline "Creating Opportunities for a Better Life." A search bar is located in the top right. The main content area has a breadcrumb trail: "Home > All Topics > Microsoft Office > Office 2010 > Word 2010". Below this is a large blue icon with a white "W" representing Word 2010. The title "Word 2010" is displayed in a large font, followed by a descriptive paragraph: "Word 2010 is a word processing application in the Microsoft 2010 Office Suite. Word allows you to easily create professional-looking documents using various themes, visual designs, formatting tools, sharing features and more." Social media sharing buttons for Facebook (802 likes), Twitter (97 tweets), and Google+ (0 +1s) are visible. A navigation bar contains three tabs: "Lessons" (highlighted), "Extras", and "Videos". Under the "Lessons" tab, there are two sections: "Word Basics" and "Common Tasks in Word". The "Word Basics" section lists seven numbered items: 1: Getting Started with Word, 2: Text Basics, 3: Formatting Text, 4: Saving, 5: Modifying Page Layout, 6: Checking Spelling and Grammar, and 7: Printing. The "Common Tasks in Word" section lists five numbered items: 8: Using Indents and Tabs, 9: Line and Paragraph Spacing, 10: Working with Lists, and 11: Adding Breaks. On the right side of the page, there are three blue buttons with white text: "Word 2010: New Features", "Exploring Your Word 2010 Environment", and "Creating Documents in Word 2010".



REVIEW

Tools for Self & Collaborative Editing

The **REVIEW** menu is what you use to edit documents on your own or in collaboration with others. There are many features, including **COMPARE** document versions so you can see the differences and decide which to accept.



For Individual & Collaborative Editing

- **Click on Track Changes**
- Select Original: Show Markup
- When you type or delete text it will look like this à
 - Deleted text will be crossed out
 - New text will be underlined
- Formatting changes will be marked by the long vertical line at the LEFT margin & notes on format on the RIGHT.

Set preferences for:

- Display working document by clicking on “Original: Show Markup”
- To show COMMENTS and formatting changes, click on SHOW MARKUP.

RAE Program (Residents as Educators)

UA COM faculty instructional development policy requires all residents to participate in instructional development activities as part of their orientation to the UA COM and UAMC as well as ongoing activities in support of teaching medical students. This section of the website contains descriptions of the Residents as Educators (RAE) Program and related resources to support resident teaching.

The Residents as Educators (RAE) Program is a new an instructional development program offered by OMSE Faculty-faculty instructional COM-College of Medicine departments, faculty affiliate sites responsible for providing education.

NOTE: You or collaborators may ACCEPT or REJECT specific changes or ALL changes.

Formatted: Default Paragraph Font, Font: (Default) Times New Roman, 12 pt, Underline, Font color: Accent 2, Border: : (No border), Pattern: Clear

Formatted: Font color: Accent 2

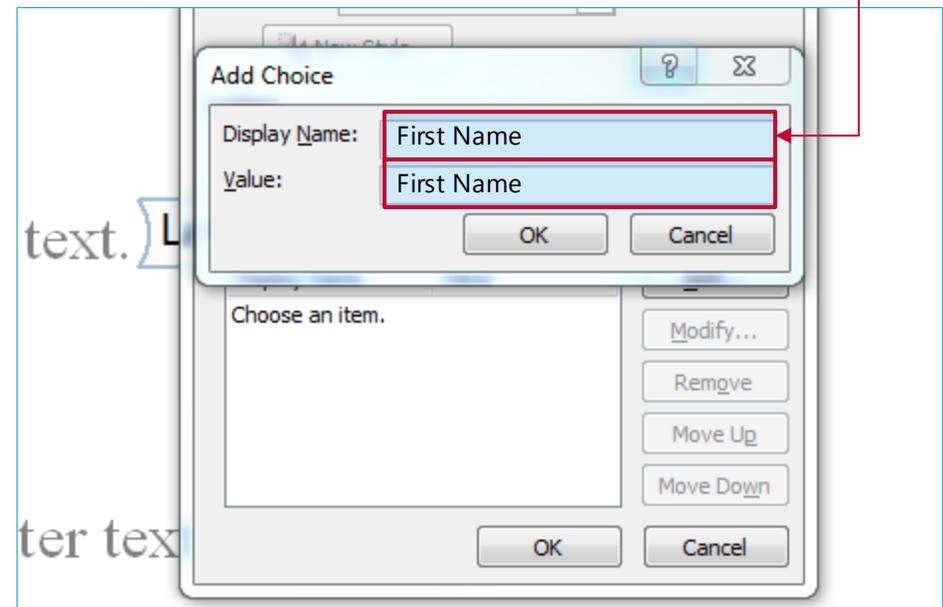
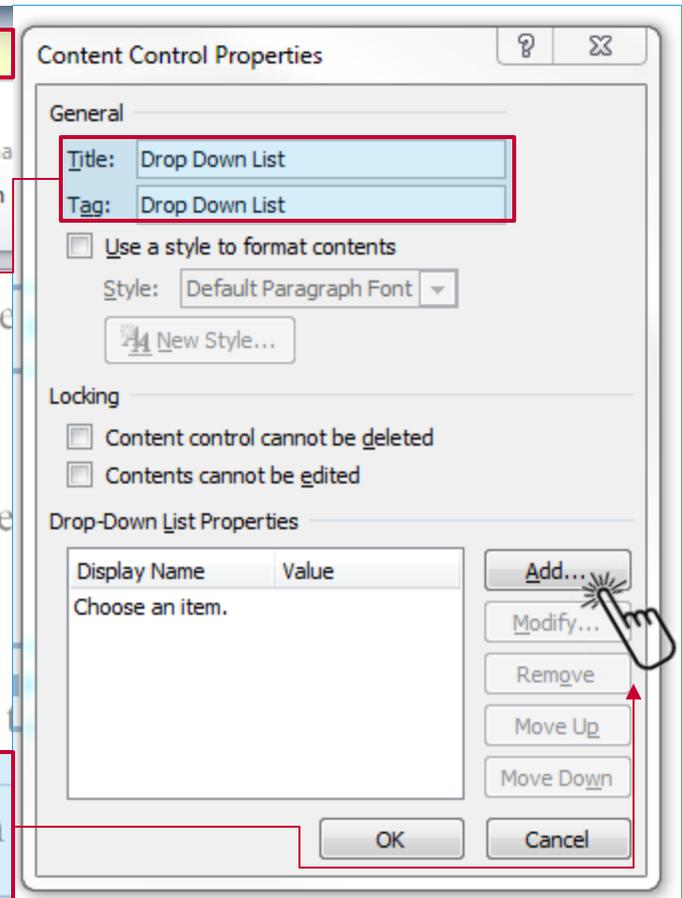
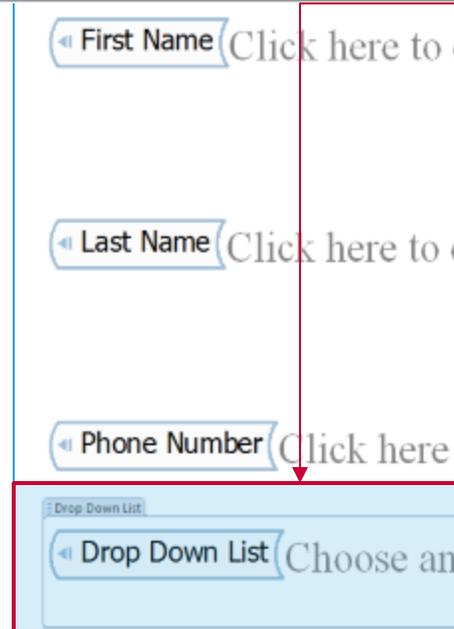
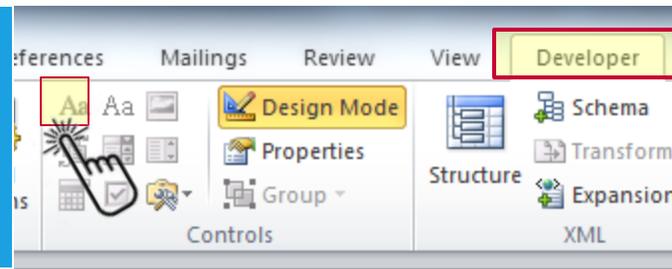
Formatted: Space After: 10 pt, Line spacing: Multiple 1.15 li, Font Alignment: Auto, Pattern: Clear



DEVELOPER Creating Forms

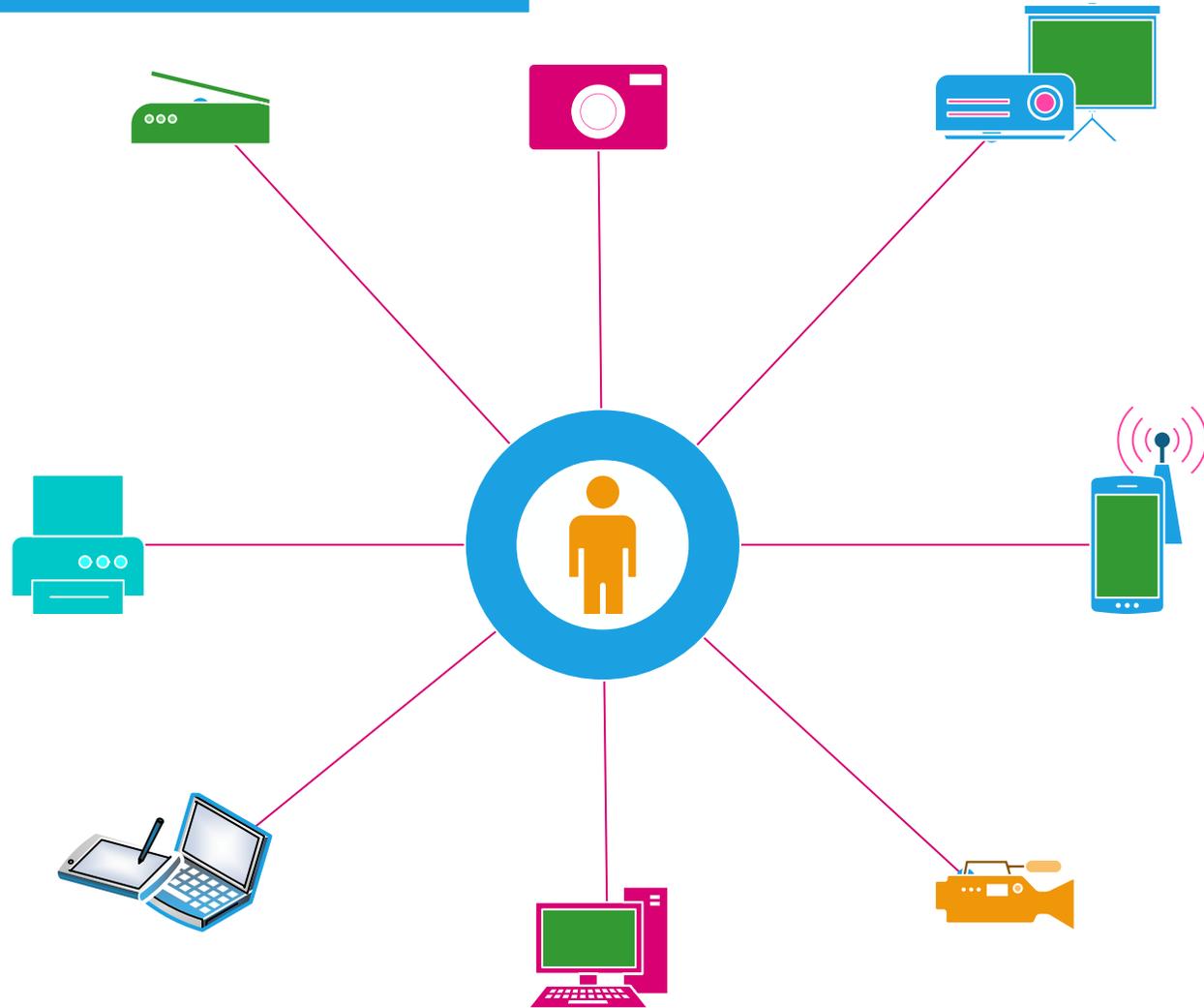
Developer Tools allow you to create forms that are “fillable” and “save-able”.

- The responder uses the TAB key to move from box to box and enters text or clicks options.
- To create forms, go to the DEVELOPER menu, then:
- Select the form element you want to add, such as Enter Text or dropdown menu, checkbox, etc.
- Once the element appears in your document, click on PROPERTIES.
- The PROPERTIES menu will pop up and ask you to:
 - Name the element (Title) (ex: Drop Down List);
 - Tag the element (This offers advice to the responder as they hover over the box);
 - Select style format (if you select nothing, it uses NORMAL formatting style).
- **For DROPDOWN MENUS**, the PROPERTIES menu also asks you to ADD the options.
 - Click ADD, and then type the option in the “Display Name” box.
 - In the VALUE box, if you enter nothing, it copies the Display Name. If you prefer, you could assign an arbitrary value such as a number or letter. This would be done for calculations or tabulations of results, if that were appropriate.
 - Click OK, and OK again.





INTERFACING with other Applications & Devices





INTERFACING with other Applications & Devices

To get you started with thinking about the interface between Microsoft Word and other applications, check out the following:

- **Haiku Deck** allows you to locate royalty free and most of the time FREE photographs that you can use to enhance your document. Using these images avoids copyright issues because Haiku Deck pulls these from users and Copyright Commons. This requires membership, but membership is FREE. You can use Haiku Deck to create presentations as well. The application can be used online from your desktop computer as well as from your iPad or iPhone.
- **One Note** allows you to take screen clippings of the screen and insert these into WORD by using the CNTRL + V function. (Word also has this feature, but you can't take a screen clipping of WORD with WORD.)
- **Mobile Apps for iPad & iPhones** There are many applications (apps) for iPad and iPhones that are compatible with Word and other office applications. If you are in a meeting and need to continue working on a document, you can send it to your Dropbox or Box.com and access the document on your mobile device. You can view it there, if that's all you need to do; or you can open it in an editing app such as Pages or Docs.



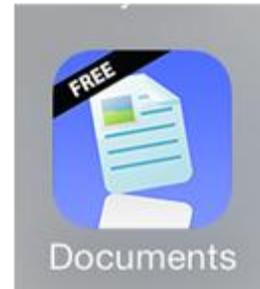
Go to Haiku Deck on the web



FREE

\$\$\$

**Go to App Store
to find Apps**



Pages



\$2.99 Buy

Notability

This app is designed for both iPhone and iPad



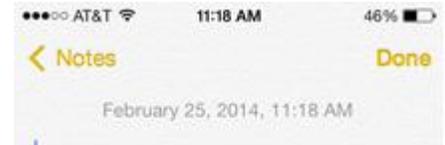
INTERFACING with other Applications & Devices

For example: Apps that are designed for:

- Producing documents of different types
- Creating drawings or graphics
- Calendaring appointments, creating reminders

The thing about the App Store is that you don't have to search for individual apps.

You can search by CATEGORY, that is, you can look for collections of apps that do certain things.



Don't forget that the basic NOTEPAD on your iPhone or iPad allows you to take notes



App Store > Productivity > Work Smarter

Work Smarter



IFTTT
Productivity

Free



Launch Center Pro
Productivity

\$4.99



Quip
Productivity

Free



Business Ca
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Business

\$6.99



Scanner Pro by
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