

Easy Steps



Unit 113 (v7) – 109 (v6)

**Produce business or organisational information
using advanced word processing functions;**

**Apply text processing skills to produce
specialist documents**

with

Microsoft Word 2013

- ☒ Easy to follow
- ☒ Step-by-step instructions
- ☒ Covers Unit Standard Criteria

A Cheryl Price Publication

Unit Standard 113 (Version 7) - 109 (Version 6)

**Produce business or organisational information using advanced word processing functions;
Apply text processing skills to produce specialist documents - Word 2013**

This book covers the course outline for the following New Zealand Qualifications Authority Unit Standard:

Unit Standard 113 - (Version 7)	BUSINESS INFORMATION PROCESSING (Level 4, Credit 10) Produce business or organisational information using advanced word processing functions (version 7).
Unit Standard 109 - (Version 6)	BUSINESS INFORMATION PROCESSING (Level 4, Credit 6) Apply text processing skills to produce specialist documents



It is recommended that defaults are changed according to instructions on page xi.

All topics in this Unit Standard are included in this book.

Retrievable exercise files are used with this book and listed on page xvii. These are available as a free download from our web site at www.cherylprice.co.nz. Instructions for downloading the exercises are included on page xix.

An Extended Learning Booklet which contains additional theory, revision exercises and general exercises is available in download format. This is a free resource to purchasers of this 113 v7-109 v6 Word 2013 Unit Standard workbook.

This book has been written using Microsoft Word 2013 with Windows 8.1.

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Introduction

Welcome to Unit Standard 113 v7-109 V6 Produce business or organisational information using advanced word processing functions; Apply text processing skills to produce specialist documents with Microsoft Word 2013.

This book has been written using Microsoft Word 2013 with Windows 8.1. (The Windows 7 operating system can be used. However screen shots will differ slightly from those shown in this book.)

Default Settings

Before commencing this course you will need to check (and amend if necessary) the default settings for Word 2013 as described on pages xi to xiii. This will ensure that all exercises and instructions in this book will work exactly as they should.

Retrievable Exercise Files

Some exercise files have been created for you to prevent time in keying in many exercises. You can then open these files and use the features of Word to manipulate and format text.

A list of these files is shown on page xvii and instructions for downloading these files from our web site are included on page xix.

What you will learn

In this course you will learn how to -

Produce business or organisation information using advanced word processing functions, including -

- styles, table of contents, indexes, forms, complex tables, macros, outline numbering, page and section breaks, import/embed data from another software application
- use of foreign characters, mathematical etc
- multiple columns, tabulated material, templates (and with variable data)
- advanced mail merge – conditional, multiple merges from same data source, linked files, document summary sheets, file management facilities (search, locate, folders and subfolders), if/then/else statements, random data records, linked databases

Apply text processing skills to produce specialist documents with the following -

- spelling, grammar, vocabulary and punctuation options
- page layout, formatting
- instructions with extensive annotated drafts containing editorial amendments
- acceptable time frames

How you will learn

This book is divided into sections. Each section page lists the learning outcomes for that section. You will work through each section and do all exercises (or those instructed by your tutor).

Revision theory and/or Assignments or a Practice Assessment are included at the end of each section. Our books include accumulation and consolidation of learning which carries across each section.

An Appendix is included at the end of the book which contains Word 2013 quick reference notes.

After you have completed the book your tutor will give you the actual Unit Standard Assessment.

Word meaning boxes

Sometimes you will see a box at the left side of the page of a line that has dotted underlining. This box will contain information to help you understand the meaning of the underlined word (or how that word is formed). An example is shown below.

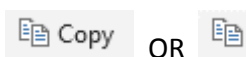
forecast
= to
calculate a
future
result

Data can therefore be altered to re-calculate budgets and to forecast results using different sales figures. Worksheets can be saved, opened and printed as required.

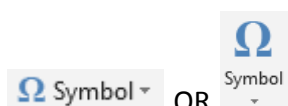
Different Word buttons

Depending on the size of your Word screen buttons on the ribbon may vary to those shown in this book. The icon with the word of that feature may show, or the icon only.

For example, the Copy button in the Clipboard group on the **HOME** tab may be displayed in either of the following ways.



The Symbol button can show as either -



Shortcut keys

Shortcut keys are indicated in the left margin, usually the first time they are used. An example follows.

- Ctrl S
- 1 Click on the Save button  on the Quick Access Toolbar .
 - 2 Type a file name for your document then click on Save.

Glossary

Generally when a word(s) is first used that is a technical term or a word that you may not know that relates to an exercise, or a particular Word 2013 feature, a description is given. You will also see that such words are in **bold**.

These terms are listed on each section page, an example is shown below. Explanations are also included in the Glossary at the end of the book.



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

AutoCorrect
Clipboard
Correction Signs
Cut
Drag and Drop
Find

Format
Microsoft Office Help
Move Text
Navigation Pane
Proof-reading
Redo

Replace
Selecting Text
Synonyms and Thesaurus
Typing Replaces Selection
Undo

Icons used in this book

This book contains icons to help guide you in your learning.

The following list shows the icon and its meaning.



Learning Outcomes

Learning Outcomes are displayed on the section page and describe what you will learn in that section.



EXERCISE 1

These are the exercises that you are required to do. Often there will be an introduction sentence to tell you what you will be doing in that exercise.



These are notes for your information.



Revision

This appears at the end of each section and contains theory revision questions relating to features learnt in that section.

Assignment One

Several assignments have been included at the end of some sections.



Practice Assessment


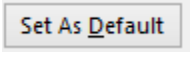
A practice assessment covers consolidation of topics learnt in that section and provides practice for students prior to sitting the actual Unit Standard Assessment.

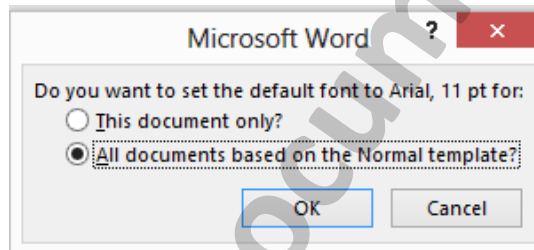
Changing Defaults

Default settings may have already been changed in your Word 2013 program. If not, you can use the following instructions to change these.

Font and Font Size

You can check if the font and font size have been changed by looking at the Font box on the **HOME** tab. If it shows **Calibri (Body)** **10** then it has not been altered. Change the default font to Arial 11 pt as follows:

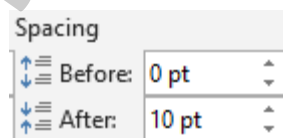
- 1 Click on the Font Dialog Box Launcher  which will display the Font dialog box.
- 2 Change the Font: to Arial and the Size: to 11 pt.
- 3 Click on .
- 4 Ensure the following option is selected for the font to be applied to *All documents based on the Normal template*.




- 5 Click on OK.

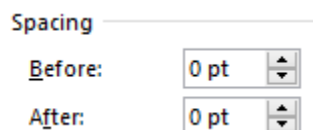
Spacing

- Click on the **PAGE LAYOUT** tab and if 10 pt Spacing After is displayed as shown below then this has not been altered. (Use the instructions below also if 8 pt After is displayed.)




Remove 10 pt spacing as follows.

- 1 Click on the Paragraph Dialog Box Launcher  which will display the Paragraph dialog box.
- 2 Change the Spacing After: to 0 pt as shown below.




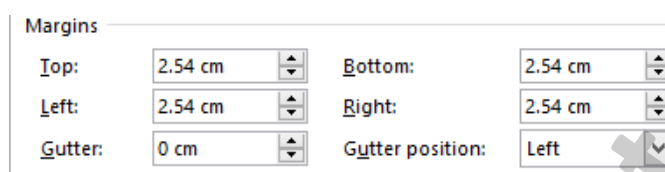
- 3 Click on .
- 4 Ensure *All documents based on the Normal template* is selected then click on OK.

Margins

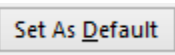
- On the **PAGE LAYOUT** tab click on the Page Setup Dialog Box Launcher  which will display the Page Setup dialog box.

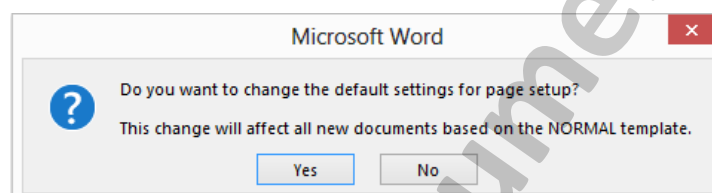
If margins are displayed as 3.17 cm change them as follows. (If they have been changed to those shown below click on Cancel.)

- 1 The Top: margin will be selected, ie **Top:** . Type: **2.54** then press the Tab key. Repeat this until the margins are displayed as shown below.



Margins	
Top:	2.54 cm
Bottom:	2.54 cm
Left:	2.54 cm
Right:	2.54 cm
Gutter:	0 cm
Gutter position:	Left

- 2 Click on .

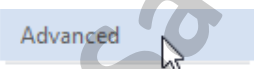


- 3 Click on Yes.

Bullets and Numbering

When bullets and/or numbering are inserted in Word 2013 a style is applied to these features. This can prevent spacing before and after, or spacing options to be used with the Line and Paragraph Spacing button.

You will therefore change bullets and numbering to be applied using the Normal style as follows:

- 1 Click on the **FILE** tab and select **Options**.
- 2 Click on  at the left.
- 3 Ensure a tick is displayed in the following ☒ Use **N**ormal style for bulleted or numbered lists .
- 4 Click on OK.


Dictionary

Microsoft Office 2013 does not have an inbuilt dictionary. We recommend that you download the Bing Dictionary as instructed below.

(If another dictionary has already been added captures in our Word 2013 books will be very similar but may not be exactly the same.)

You will need to be connected to the Internet to be able to download the dictionary and to use it.

- 1 Click on the **INSERT** tab then click on .

- 2 In the Apps for Office dialog box click on  which will take you to the Microsoft Apps Store.

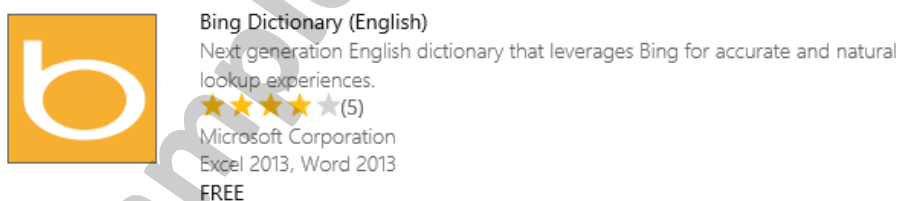
(If other apps have been installed you need to click on  .

- 3 In the Search box at the top of the window type **dictionary** as shown below.




- 4 Click on the Search button .

- 5 Click on the following dictionary which we have selected because it is FREE and has the highest star rating. It can also be used in Excel 2013.



- 6 Click on  then on .

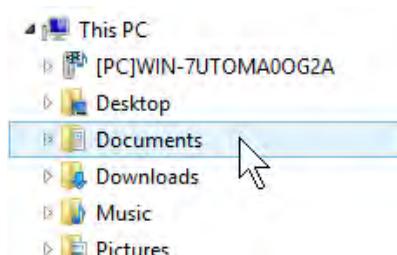


The Bing Dictionary will now show on the  button and will be used for spelling and grammar checking, synonyms and thesaurus.

Save Options

When a document is saved you will be requested to select the location, ie Computer then click on the Browse button and select the folder required. You can eliminate this procedure by selecting the location and saving directly to the Save dialog box and therefore bypass Backstage view.

For the purposes of this book we have used the Documents folder within This PC as the default folder. This folder is shown below which is the shortcut for the actual path name of C:\Users\User Name\Documents. This means that files you open and save will be on your hard drive.



Use the following instructions to specify the Documents folder as the default file location:

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the Documents folder is displayed as the Default local file location as shown below.

- ☒ Don't show the Backstage when opening or saving files
- ☐ Show additional places for saving, even if sign-in may be required.
- ☐ Save to Computer by default

Default local file location:

C:\Users\Cheryl\Documents\

Browse...

- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.
- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*
- 6 Click on OK.



If you wish to open and save files to OneDrive (ie the cloud) use instructions on the next page.

If you have Windows 8, or have updated to Windows 8.1 from Windows 8, SkyDrive may be displayed instead of OneDrive but is essentially the same.

OneDrive

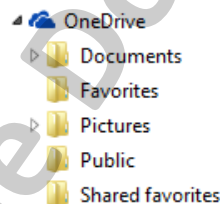
OneDrive is a cloud storage application from Microsoft. It is one of the major online file storage options competing with Dropbox and Google Drive.



Because files are stored “in the cloud” (in addition to your hard drive) it means that you can access those files from anywhere in the world because you will always have access to the OneDrive application and your files. You do however need an Internet connection for the files to be updated from your hard drive to OneDrive.



Saving to OneDrive

OneDrive is automatically set up when Microsoft Office 2013 (ie Office 365) is installed on your computer. A OneDrive folder will be displayed on the Navigation Pane in Windows Explorer as below.



Files can be saved manually by clicking on the Save button  on the Quick Access Toolbar, specifying a name for your file then clicking on the  OneDrive icon (you may wish to double click on Documents and save to that folder).

OneDrive as the Default File Location

Use the following instructions if you wish to specify OneDrive as your default file location.

- 1 Click on the **FILE** tab then click on **Options**.
- 2 Click on **Save** at the left.
- 3 Ensure that the C:\Users\User Name\OneDrive\Documents folder is displayed as the Default local file location as shown on the next page. (You may need to retype the location)
- 4 Also ensure that *Don't show the Backstage when opening or saving files* option displays a tick.

- 5 Remove the tick from the next option *Show additional places for saving, even if sign-in may be required.*

- ☒ Don't show the Backstage when opening or saving files
☐ Show additional places for saving, even if sign-in may be required.
☐ Save to Computer by default

Default local file location:

C:\Users\Cheryl\OneDrive\Documents

Browse...

- 6 Click on OK.

OneDrive Website

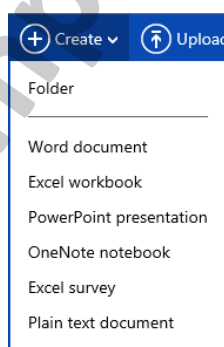
You can log in to the OneDrive website using your web browser with your login name and password.

The website is www.OneDrive.live.com.



You can upload photos and use files and share files.

New files can be created through OneDrive by clicking on **Create** and selecting the program you wish to use, eg Word (web applications in OneDrive are slightly cut-down versions of Office 2013 programs).



Sharing Files

From within Word 2013 you can save files to OneDrive (usually to the Documents folder) and then share those files. You can then click on the **FILE** tab, on **Share** and invite people to share files in OneDrive.

Alternatively, you can right click on a file in the OneDrive website (see above) and select Sharing.

Use Google in your web browser to search for additional information on OneDrive.

Exercise Files used in this book

(Instructions are included on the following page for downloading retrievable files from our web site at www.cherylprice.co.nz)

Names of files	
AA	Fuel
Address Data	Garamond Macron Font
Africa	Growing Beautiful Roses
Airport	Growing Herbs
Aroma	Harold Spencer Exhibition
ASB Bank	Herbs
B&A Paragraphs	Herbs 1
Barrier Reef	Hillside
Barrier Reef Info	Hockey
Bloxbury Letterhead	Holiday
Book Sales for 2014	Holland
Book Sales for 2014-Chart	Holland-Index
Building Specifications	Homonyms
Business Data	How to Grow Orchids
Cairns	Johannesburg
Care of a New Puppy	Kindles
Cashflow	Lecture
Clipper Cruises	Legal Documents
Confused Words1	Lifestyle Books Budget 2015
Contiki	Lifestyle Books Letterhead
Copy	Lifestyle Books Sales Summary
Culinary Herbs	Lilies
Desktop Publishing	Managing a Mortgage
DTP-Index	Meeting Documents
Email	Orchids
Employment Contract	Pacific Islands
Excavation	Paris in the Late 19 th Century
Far North Temperatures	Planner
FD Letterhead	Pool Tips
FD Order Form	Prize Data
Financial Documents	Promotional Brochures
Floating Tables	Queensland Art Gallery
Formal Reports	Rembrandt to Renoir
Forms	Roses

Continued on next page

Rotorua	The Big O.E.
Sadd	Training Confirmation
Shareholders Report	Triathlon
South Africa	Using Bulbs
Sparkling Pools	Vegetables
Star Signs1	Viva Las Vegas
Table Exercises	Whale Exhibition Prices
Technical Documents	Whales Exhibition
Tennis Club	Word 2013 Revision



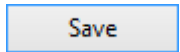
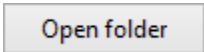
Note that there may be additional files downloaded not listed above which are for use with the Extended Learning Booklet for this unit.

Downloading Exercise Files

The exercise files listed on the previous page can be downloaded from the Cheryl Price web site using the instructions below.



For the purposes of this book we have specified Exercise files to be downloaded to the Documents folder within This PC which is the shortcut for the actual pathname of C:\Users\User Name\Documents. This is where files will be opened from and saved to.

1	In the address bar of Internet Explorer, type: www.cherylprice.co.nz
2	Press Enter on the keyboard to display the Cheryl Price website.
3	Click in the Product Search box and type the number of this unit standard, as shown at the right. <div data-bbox="1056 669 1362 853" data-label="Image"> </div>
4	Click on 
5	Click on US 113/109
6	Under the Exercise Files heading click on the underlined blue hyperlink, ie Book Exercise Files – 113v7-109v6 Word 2013 Free Download The File Download dialog box will display.
7	<p>a Click on  Save as then</p> <p>b Change file name to <i>US113 v7- 109 v6 Word 2013 Book Exercise Files</i>.</p> <p>c Click on the Documents folder shown below.</p> <div data-bbox="647 1397 1027 1615" data-label="Image"> </div> <div data-bbox="379 1653 448 1720" data-label="Image"> </div> <p>The Documents folder under This PC is the shortcut for C:\Users\User Name\Documents</p> <p>d Click on .</p>
8	<p>a Click on .</p> <p>b Right click on the zipped exercise file and select Extract All. Click on Extract. A folder will be created containing the exercise files.</p> <p>c Delete the Compressed (zipped) Folder.</p>

NZQA Outcomes and Evidence Requirements

Unit Standard 113 (Version 7)

Title	Produce business or organisational information using advanced word processing functions		
Level	4	Credits	10

Purpose	People credited with this unit standard are able to: apply advanced features and functions of word processing to produce business information; and apply language and text processing skills to produce business information.
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Classification	Business Administration > Business Information Processing
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Available grade	Achieved
------------------------	----------

Entry information	
Recommended skills and knowledge	Unit 112, <i>Produce business or organisational information using word processing functions</i> .

Explanatory notes

- 1 All activities associated with this unit standard must comply with occupational health and safety guidelines and recommendations in relation to working environment and work practices. Reference for this unit standard includes *Guidelines for Using Computers*. Occupational Safety and Health Service: Department of Labour, available at <http://www.osh.dol.govt.nz/order/catalogue/computers.shtml>.
- 2 **Definition**
Established conventions refer to accepted practices of display and design for page layout, font selection and size, use of proportional font, text formatting, use of lines, boxes, borders, shading, tables and columns, and margin alignment. Conventions used must produce documents that are fit for their intended use and meet organisational style requirements.
Organisational requirements refer to the management practices used by the organisation.
- 3 Business or organisational information requires the production of six different types of complex documents which may include but are not limited to – legal, financial and technical documents; formal reports; formal meeting documents; promotional brochures; forms for completing electronically and/or manually.

- 4 Spelling, grammar, vocabulary, and punctuation in the documents must be consistent with the nature and purpose of the business or organisational information required. Candidates must be given the opportunity to proofread their work prior to submission.
- 5 Logical structures such as folders must be used to organise and store files according to organisational requirements.

Outcomes and evidence requirements

Outcome 1

Apply advanced features and functions of word processing to produce business information.

Evidence requirements

- 1.1 Advanced formatting features are applied to present documents in accordance with the output required and organisational style requirements.

Range advanced formatting features include – creation and application of styles, table of contents and index, drop-down list and inserted field codes (in electronic form), complex tables, macros, outline numbering, page and section breaks, import/embed data from another software application;
includes at least two of the following – use of foreign characters, mathematical symbols and/or foreign currency symbols, calculations and use of formulae, integration of text and graphics, assembling documents using hyperlinks.
- 1.2 Documents are produced incorporating multiple columns and tabulated material in accordance with system features and output required.
- 1.3 Templates are produced and variable data is inserted in accordance with the output required.
- 1.4 Documents are produced using advanced merge options in accordance with the output required.

Range conditional merge, multiple merges from same data source, linked files, if/then/else statements, random data records, linked database; evidence of three is required.
- 1.5 Document summary sheets are used to ensure effective file management in accordance with file access and retrieval requirements, and organisational requirements.
- 1.6 File management facilities are used to search, locate, and manipulate word processing files, folders and subfolders in accordance with system features and organisational requirements.

Outcome 2

Apply language and text processing skills to produce business information.

Evidence requirements

- 2.1 Spelling, grammar, vocabulary, and punctuation are consistent with the nature and purpose of the complex documents required.
- 2.2 Page layout, format and design of complex documents are consistent with established conventions, the output required, and meet organisational style requirements.

Planned review date	31 December 2015
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Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	30 March 1993	December 2011
Review	2	27 June 1996	December 2011
Review	3	28 April 1997	December 2011
Review	4	28 June 1999	December 2011
Review	5	26 September 2005	December 2012
Review	6	17 December 2010	December 2012
Revision	7	18 August 2011	N/A

Consent and Moderation Requirements (CMR) reference	0113
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This CMR can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Unit Standard 109 (Version 6)

Title	Apply text processing skills to produce specialist documents		
Level	4	Credits	6

Purpose	People credited with this unit standard are able to apply text processing skills to produce specialist documents.
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Classification	Business Administration > Business Information Processing
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Available grade	Achieved
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Entry information	
Recommended skills and knowledge	Unit 108, <i>Apply text processing skills to produce business documents</i> .

Explanatory notes

- 1 All activities associated with this unit standard must comply with occupational health and safety guidelines and recommendations in relation to working environment and work practices. Reference for this unit standard includes OSH 3211 AFC: 1996 *Approved Code of Practice for the use of Visual Display Units in the Place Of Work*. Occupational Safety and Health Service: Department of Labour, available at <http://www.osh.govt.nz/order/catalogue/pdf/vdu-ac.pdf>.
- 2 Definitions
Text processing conventions refers to accepted practices of display for page layout, font selection and size, text formatting, use of lines, boxes and borders, expression of scientific and mathematical symbols and formulae, foreign languages, and white space.
Conventions used must produce documents that are fit for their intended use and meet organisational style requirements.
Commercially acceptable time frame is a period of processing time considered acceptable in New Zealand business and in line with client needs and expectations.
- 3 Evidence of text processing and editing skills must include the following features, which may be demonstrated once over all five specialist documents rather than in each – extensive amendments, scientific and mathematical symbols and formulae, tables, boxes and/or borders.
- 4 Spelling, grammar, vocabulary, and punctuation in the documents must be consistent with the nature and purpose of the business or organisational information required.
Candidates must be given the opportunity to proofread their work prior to submission.

- 5 This unit standard does not cover the requirements for medical and legal documents, as those are included in: Unit 21866, *Demonstrate knowledge required in medical administration roles, and produce medical documents*; Unit 18180, *Produce text processed clinical documents*; and Unit 127, *Demonstrate knowledge required in legal administration roles, and produce legal documents*; Unit 110, *Review text processing and information production practices in a business or organisational context*, at level 5, also includes legal documents.

Outcomes and evidence requirements

Outcome 1

Apply text processing skills to produce specialist documents.

Range specialist documents may include but are not limited to – organisational, administrative, promotional, scientific, mathematical, academic documents; evidence is required for five different types of specialist documents.

Evidence requirements

- 1.1 Spelling, grammar, vocabulary, and punctuation are consistent with the nature and purpose of the specialist documents required.
- 1.2 Page layout, format and display of specialist documents are consistent with text processing conventions and the outputs required, and meet organisational style requirements.
- 1.3 Specialist documents are composed from instructions, including annotated drafts containing extensive editorial amendments, in accordance with information provided and output required.
- 1.4 Specialist documents are processed and presented within a commercially acceptable time frame and in accordance with information provided and output required.
- 1.5 Specialist documents are produced in accordance with text processing conventions.

Planned review date	31 December 2015
----------------------------	------------------

Status information and last date for assessment for superseded versions

Process	Version	Date	Last Date for Assessment
Registration	1	30 March 1993	December 2011
Review	2	27 June 1996	December 2011
Review	3	28 April 1997	December 2011
Review	4	28 June 1999	December 2011
Review	5	26 September 2005	December 2012
Review	6	17 December 2010	N/A

Accreditation and Moderation Action Plan (AMAP) reference	0113
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This AMAP can be accessed at <http://www.nzqa.govt.nz/framework/search/index.do>.

Section

1

Fonts and Page Layout Multilevel Numbering Borders and Shading Symbols and Characters File Management



Learning Outcomes

At the end of this section you should be able to -

- ☐ Describe advanced word processing features
- ☐ Use Document Properties for efficient file management
- ☐ Use bullets, numbering and multilevel numbering
- ☐ Apply borders and shading
- ☐ Insert symbols and characters
- ☐ Locate files and folders stored on your computer
- ☐ Search for files and folders using search features
- ☐ Manage files and folders
- ☐ Use printing options



In this section you will come across the following words highlighted in bold. This indicates that the word is included in the Glossary at the end of the book together with a description of that word.

Address Bar
ANSII Codes
ASCII Codes
Backstage View
Bullet
Contextual Tab
Diacritical Marks
Fields
Format Painter

Graphics
Landscape Orientation
Macrons
Macros
Mail Merge
Multilevel Numbering
Navigation Pane
Quick Access Toolbar
Ribbon

Sections
Styles
Symbols
Templates
USB Drives
USB Port
Watermarks
Word Art

Introduction

Advanced word processing skills provide solutions to many of the problems that occur when working with longer and more complex documents than a simple letter, memo or report. It is a common occurrence to have to create, edit, or otherwise manage documents that are several hundred pages in length. Advanced skills focus on ways to effectively manage these types of documents, emphasising features and functions that automate tasks, and manage large documents effectively. Some of the advanced word processing skills you will learn in this book are described below.

Styles

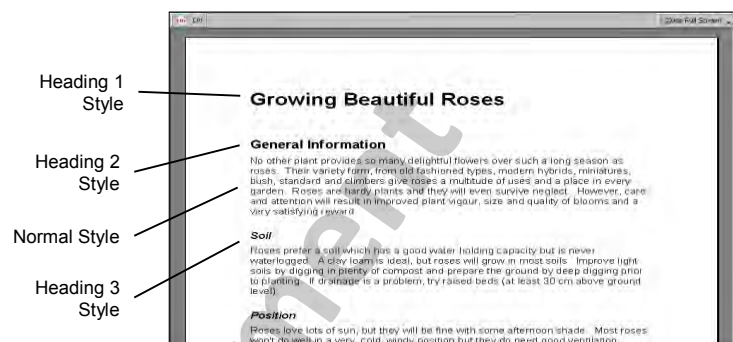
A **style** is a set of formatting instructions combined into a meaningful name that can be applied easily to text. One of the main purposes of styles is to create consistency.

For example, the same style should be applied to all the main headings in a document, and all the other levels of headings below them should also be consistent.

In this way it is clear which sub-headings belong together under main headings and therefore belong to the same subject.

Styles can also assist with navigating in a long document, because it is possible to “browse” by heading, jumping from one to the next, as long as styles have been applied.

Word contains a large number of built-in styles for use in many different kinds of documents. These styles can be modified or new styles can be created.



Macros

A **macro** is a series of Word commands grouped together as a single command. Its purpose is to automate repetitive tasks, saving time and reducing the opportunity for errors. A macro can be assigned to a shortcut key combination or to a button on the **Quick Access Toolbar** or the **ribbon**.

Fields

Fields are codes that instruct Word to insert text, **graphics**, page numbers, dates, etc. Fields automate tasks that would otherwise be completed manually and constantly modified as changes are made to a document. An example is the use of fields for page numbering; sequential numbering occurs automatically and is retained when pages are added or removed. A date field will automatically update to show the current date every time the document is opened.

Templates

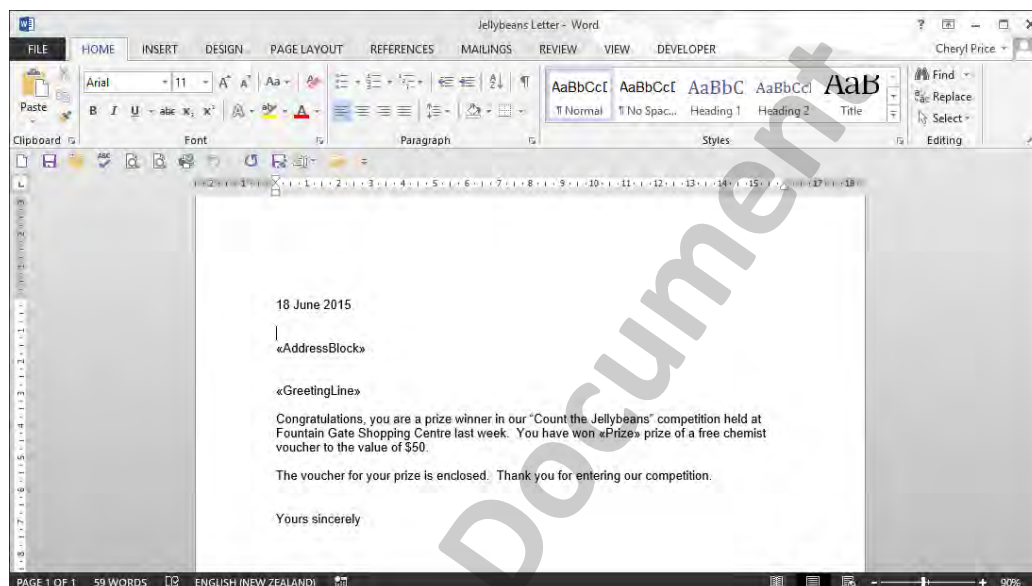
Word has a number of **templates** containing styles and page layout settings for creating different kinds of documents. Many of them contain powerful built-in macros that prompt for information or instructions for inserting information in the appropriate place. Templates are used to save time and to ensure that similar documents, such as faxes, letters or reports, are formatted consistently. They can be modified to suit specific requirements, or new templates can be created. A template can contain styles, macros and fields.

Sections

Long documents can be split into **sections** that contain different formatting or other features. For example, each section could have its own title in a header or footer, or a certain section could be displayed in **landscape orientation** to better display the information in it, such as a chart or table.

Advanced Merging and Sorting Data

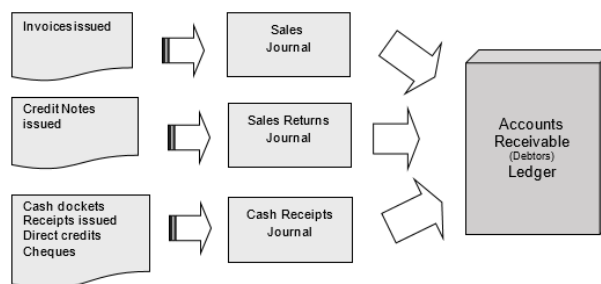
Mail merge simplifies repetitive documents and tasks. It can create many documents at once that contain identical formatting, layout, text, graphics, etc and where only certain parts of each document vary. A common use of mail merge is to combine a main document such as a letter or email, with variable information, such as the names and addresses of those to whom the letter will be sent.



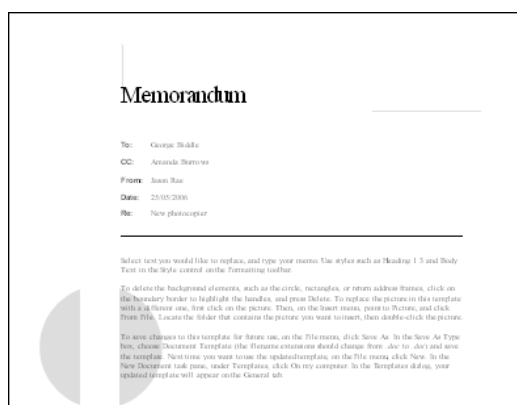
Advanced merge options such as sorting and the use of fields further automate and refine the mail merge process, providing a fast and accurate solution to potentially complex and time consuming tasks.

Graphics

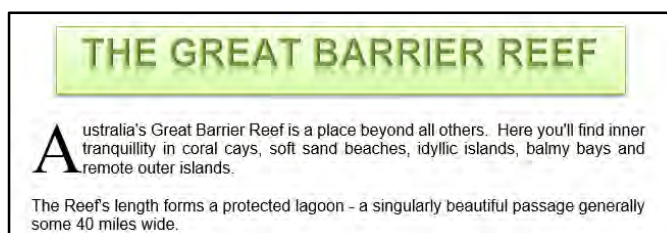
Graphics can provide significant enhancements to a professional document. It's possible to add not only pictures, but many other images, such as text boxes, a variety of shapes, callouts, captions, charts, **Word Art** and **watermarks**.



AutoShapes and text boxes



Memo containing watermark
(based on the Contemporary Memo template)



Heading created using WordArt

Standard Formats

Most organisations use a system for formatting of documents which is often referred to as in-house organisational style. This results in standardisation and recognition of documents and creates an image/branding for that organisation. Documents generally include:

- Letterhead
- Memos
- Faxes
- Agenda
- Minutes of Meetings
- Emails
- Report production
- Spreadsheet headings and formatting
- Balance Sheets and accounting documents, eg invoices, statements
- Additional documents relating to the type of business, eg in a legal firm this would include wills, deeds etc.

Many companies produce a Style Manual or Procedures Manual, which contains sample documents, formats used and guidelines for using such documents. This can also include punctuation policies, letter endings, etc. These manuals can range from a short simple document to a large bound manual.



Templates

Templates are generally set up for documents that are used often, eg a Word fax form, Excel Balance Sheet, specific formatting of a PowerPoint presentation etc. A template in simple terms is a read-only file that can be opened on screen with formatting applied. Styles are usually set up in a template for ease of use and to ensure consistent formatting. Text can also be included in a template, eg fax information such as To, From, Date, Subject.

Styles

A style is a set of formatting instructions combined into a meaningful name that can be applied easily to text, eg formatting instructions for a heading that is Arial, 14 pt, left aligned and bold, could be assigned as Heading 1. This can then be applied from the Styles box on the Formatting toolbar to all text requiring this formatting.

Look at the headings on this page - the following styles have been used:

Standard Formats

Templates

Styles

Normal text

Heading 1 (Arial 16 pt, bold, Left Indent -0.7 cm, 15 pt Spacing After, Bottom Border)

Heading 2 (Arial 13 pt, bold, 12 pt Spacing Before, 6 pt Spacing After)

Heading 3 (Arial 11.5 pt, bold, 6 pt Spacing After)

Normal (Calibri 11.5 pt, Justified)

Templates are usually set up by staff with a high knowledge level of Word. The templates can then be used easily by other staff who may not have such a good knowledge.

The following documents show examples of organisational style requirements of formatting for our company. Notice the same company logo, colour scheme, templates, etc are used throughout.



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INVOICE
GST NO: 62-093-061

Invoice To: Jennifer Hall, 91 Glenview Drive, Orewa 0931
Delivery Details: Jennifer Hall, 91 Glenview Drive, Orewa 0931
DATE: 1 November 2010
INVOICE: 1138

School Contact:
ORDER NO: 1078

Comments or Special Instructions:
Books on Back Order
US 2786 v6 Excel 2007, US2787 v6 Access 2007

QUANTITY	DESCRIPTION	UNIT PRICE	AMOUNT
1	Unit Standard 107 v5 Word 2007 (hard copy)	\$34.95	\$34.95
1	Unit Standard 112/106 v5 Word 2003 (hard copy)	\$44.95	\$44.95
1	Unit Standard 2786 v6 Publisher 2007 (hard copy)	\$34.95	\$34.95
SHIPPING & HANDLING			10.00
TOTAL			\$124.85

Invoice includes GST of \$16.29

Please make all cheques payable to Cherylprice.co.nz
OR payment can be made direct to: 030114-020241-00 (Westpac account - Cherylprice.co.nz Limited)

If you have any questions concerning this invoice, contact us by email at info@cherylprice.co.nz

THANK YOU FOR YOUR BUSINESS

Phone: (09) 422 7230
Mobile: 021 715 567
Fax: (09) 422 7236

PO Box 187, Matakana, Auckland 0943, NZ
info@cherylprice.co.nz

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- For the second and subsequent years a discount of 30% applies to the initial licence fee.
- For each current site licence the institute is entitled to free upgrades to later NZQA version changes and Microsoft program version changes during the currency of the site licence upon request and subject to availability.
- For each current site licence the institute will also be entitled to purchase, on an annual basis, the equivalent number of assessments at list price less 30%.
- In addition to printing only the licenced number of copies (ie 20 or 50) the licences will be entitled to use the PDF file on the institute's network or intranet for that site only.

Site licensing in this manner gives the institute a fixed annual cost and provides an upgrade path at minimal cost apart from additional printing of any revised versions.

Institutes that purchase a licence will be sent the PDF copy of the book on CD together with the Exercise Files (zipped and in program format) where applicable. Postage of \$6.00 will be added to these purchases.

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info@cherylprice.co.nz

Easy Steps

Unit 107 (v6)
Apply text processing skills to produce communications in a business or organisational context
with
Microsoft Word 2013

☒ Easy to follow
☒ Step-by-step instructions
☒ Covers Unit Standard Criteria

A Cheryl Price Publication

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Customising the Quick Access Toolbar

The Quick Access Toolbar can be used for your most frequently used commands.

It can be customised – commands can be added or removed.

The Quick Access Toolbar can be positioned either above or below the ribbon.

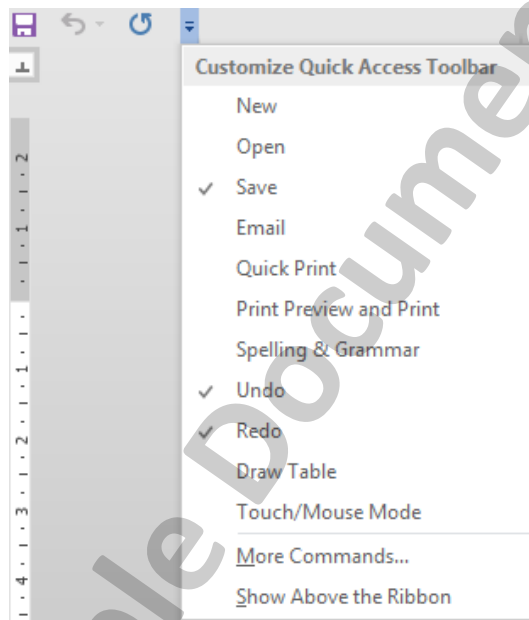
Quick Access Toolbar List

In this exercise you will add commonly used commands to the Quick Access Toolbar.



EXERCISE 1

- 1 Click on the Customize Quick Access Toolbar ▾ to the right of the Quick Access Toolbar. Options that can be added are displayed as shown below.



A tick displays to the left of every option that is currently displayed on the Toolbar.


- 2 Click on New to add it to the Quick Access Toolbar.
- 3 Click on the Customize Quick Access Toolbar ▾ again.
- 4 Click on Open.
- 5 Add the following options to the Toolbar using the same steps.
 - Quick Print
 - Spelling & Grammar

Additional Quick Access Toolbar Commands

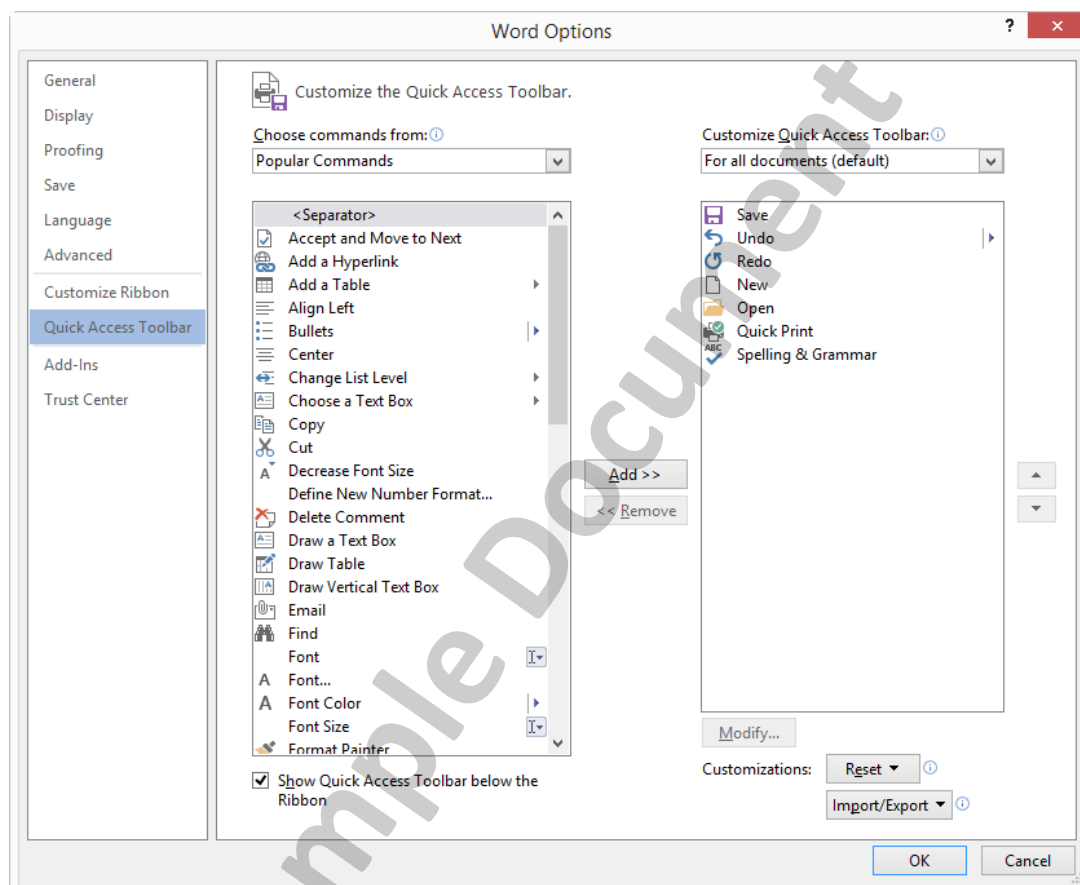
Some other useful options that are not on the Quick Access Toolbar list can be added using the following steps.




EXERCISE 2



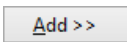
- 1 Click on the Customize Quick Access Toolbar  at the right of the Quick Access Toolbar and select **More Commands...**

The Word Options dialog box will display, with the Quick Access Toolbar option selected at the left.





- 2 Click on the Choose commands from:  and change the selection from Popular Commands to All Commands.

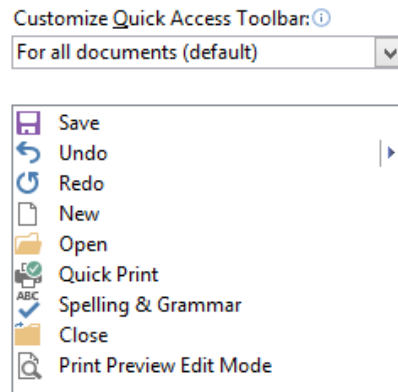
Commands are listed in alphabetical order below.

- 3 In the list underneath, scroll down until  **Close** is displayed.
- 4 Click on the  **Close** command.
- 5 Click on .

- 6 Also add  **Print Preview Edit Mode**.

(You can also add  **Print Preview and Print** option if desired. This will be displayed with the same button  on the Quick Access Toolbar but the name will be different.)

The commands will be added to the Quick Access Toolbar list on the right as shown below.




- 7 Add other buttons as required, eg AutoText.

- 8 Ensure a tick is displayed in the following option ☒ **Show Quick Access Toolbar below the Ribbon** at the bottom of the dialog box.

- 9 Click on .

The Quick Access Toolbar is now displayed between the ribbon and the ruler as shown below.



You can click on the Customize Quick Access Toolbar  and select **Show Above the Ribbon**. The position that you display the Quick Access Toolbar is entirely up to you.

It is a more effective option however, to display the Quick Access Toolbar below the ribbon for speedy access to the buttons you have added.

You can add other useful buttons to the Quick Access Toolbar as you progress through this book.



The ribbon can also be customised by clicking on the FILE tab, selecting Options then Customize Ribbon.

Commands can be added/removed in the same way as customising the Quick Access Toolbar.

New groups and new tabs can be created.

Bullets and Numbering

Bulleted Paragraphs

Bulleted paragraphs are normally a list of topics in no precise order. A **bullet** or **symbol** appears at the left margin with the paragraph indented. If a bulleted paragraph is moved or deleted the bullets remain (no change occurs).

An example of bulleted paragraphs is shown below.

Bulleted Paragraphs

Bulleted paragraphs are used to list items or describe features/objects.

- To use bullets, on the HOME tab click on the Bullets button in the Paragraph group. This will apply a bullet to the current paragraph.
- Text is typed normally. Each time you press Enter a new bullet will appear. To turn bullets off just click on the Bullets button.
- Bullets can be changed to a different style, eg arrows, boxes, stars, etc.

The indent can be changed by selecting the bulleted paragraphs, right clicking and selecting Adjust List Indents. The Number position: and Text indent: measurements can then be altered.

Numbered Paragraphs

When paragraphs are numbered they are displayed in a sequential order, eg 1, 2, 3, or A, B, C, etc. These paragraphs are typically listed in a logical order for a specific purpose, eg a list of instructions.

An example of numbered paragraphs is shown below.

Numbered Paragraphs

This is an example of numbered paragraphs.

1. To start paragraph numbering, on the HOME tab click on the Numbering button in the Paragraph group.
2. Type each paragraph as you would normally. Each time you press Enter you will move to a new line and a new paragraph number will appear.
3. Once you have typed your last numbered paragraph and pressed Enter, click on the Numbering button to turn off numbering.

If you move or delete a numbered paragraph the numbering will automatically update.

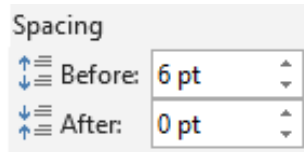
The indent can be changed by selecting the numbered paragraphs, right clicking and selecting Adjust List Indents. The Number position: and Text indent: measurements can then be altered.


To remove a bullet or number from a paragraph, click at the beginning of the paragraph then on the Numbering button OR press the Backspace key.

Spacing between Bulleted and Numbered Paragraphs

The procedure to adjust spacing between bulleted and numbered paragraphs is as follows:

- 1 Select the bulleted or numbered paragraphs.
- 2 Click on the PAGE LAYOUT tab and change the spacing as required in the Spacing section of the Paragraph group as shown below.



Alternatively click on the Paragraph Dialog Box Launcher  and change spacing in the Paragraph dialog box. (The tick must be removed from the *Don't add space between paragraphs of the same style* checkbox.)

Multilevel List Paragraphs

Multilevel numbering is used when you have a sublist within a list, eg when you have numbered paragraphs explaining each step, then instructions for various steps within the list.

You can have up to six levels within a numbered list. Each time there is a new level the list is indented.

The multilevel list that you will create in the next exercise is shown below.

Word 2013 Revision

In a new document type answers to the following questions, which relate to features you have learnt so far in Word 2013.

- 1) You may wish to use the Help feature to assist you.

Every document created in Word 2013 has a template attached to it. What is this template called and explain the use of templates.

- 2) The Font dialog box can be accessed from the Font group, from the shortcut menu or by pressing Ctrl D. Answer the following questions regarding fonts:

- a) Explain the term "True Type" fonts and how you would recognise True Type fonts in Word 2013.
- b) What is the "hidden text" option used for?
- c) The Format Painter button is used to copy formatting. Explain the two ways that this button can be used.


- 3) Ctrl T will indent to the first tab stop. Explain other ways you can indent text in Word 2013.

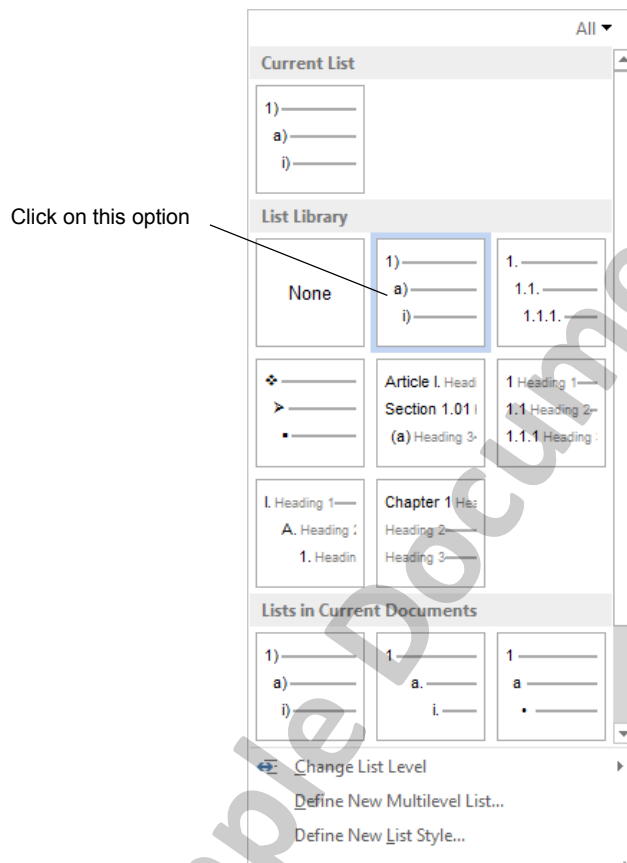
You will find that the additional exercises and revision sheets at the end of each section will consolidate your knowledge of Word 2013.

In the following exercise you will add numbering as shown above then remove the brackets from the numbers.





EXERCISE 3

- 1 Open the document called **Word 2013 Revision**
- 2 Select the heading and change it to Arial 16 pt, bold.
- 3 Click at the beginning of the second paragraph. On the HOME tab click on the Multilevel List button  in the Paragraph group. The List Library will display numbering styles.
- 4 Click on the numbering option shown below.





The first number will be inserted into the document.

- 5 Move to the end of the second paragraph where you have inserted the first number and press Enter.
- 6 To skip numbering for the next typed paragraph:
 - a Press the Backspace key
 - OR click on the Numbering button  then on the Increase Indent button .
 - b Type the paragraph below.

Every document created in Word 2013 has a template attached to it. What is this template called and explain the use of templates?


- c Press Enter.

7 To start numbering again:

- a Click on the Numbering button .
- b Click on the Decrease Indent button . (This paragraph will be numbered 2)).
- c Type the paragraph shown below.


The Font dialog box can be accessed from the Font group, from the shortcut menu or by pressing Ctrl D. Answer the following questions regarding fonts:

- d Press Enter.

8 To demote the numbering (to level two) click on the Increase Indent button .

9 The next paragraphs will be numbered as a), b) and c). Press Enter after each paragraph.

- a) Explain the term "True Type" fonts and how you would recognise True Type fonts in Word 2013.
- b) What is the "hidden text" option used for?
- c) The Format Painter button is used to copy formatting. Explain the two ways that this button can be used.

10 To promote the numbering (back to level one) click on the Decrease Indent button .

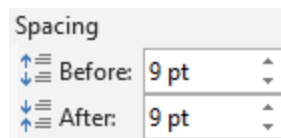
11 Type the following paragraph. 3) is used for this paragraph.

Ctrl T will indent to the first tab stop. Explain other ways you can indent text in Word 2013.

12 Leave the last paragraph without numbering.

13 Select from the beginning of the first numbered paragraph 1) down to the end of the document.

14 On the PAGE LAYOUT tab change Spacing Before and After to 9 pt as shown below.



15 Save the file, print and close.