

Customizing Documents

Lesson Skill Matrix

Skill	Exam Objective	Objective
Formatting, Creating, and Customizing	Create Custom Themes.	4.2.3
	Create Custom Color	4.2.1
	Create Custom Font	4.2.2
Formatting a Document Using Style Sets	Create Custom Style	4.2.4

Software Orientation

The Design Tab

The Design tab offers several different ways to format a document using Themes or by selecting a Style Set. Changing the appearance of the document can capture the attention of your audience. After opening a document, you can access the commands on the Design tab, shown in Figure 4-1. Use this figure as a reference throughout this lesson as well as the rest of the book.

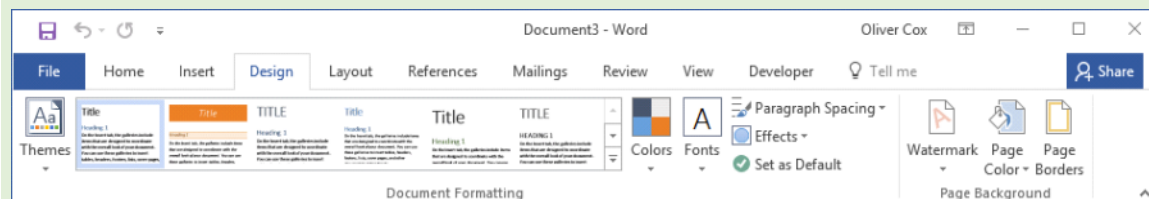


Figure 4-1
Design tab

Once you have applied a theme or style set, you can change or customize the colors, fonts, and effects. You also have the option to set the formatting as your default without having to reset it each time you work on a new document. Another feature in Word 2016 is Paragraph Spacing—you can quickly change the line and paragraph spacing to predefined values. Changing the appearance of a document's background is another way to grab a reader's attention.

Formatting, Creating, and Customizing a Theme

Word provides features such as Themes to produce creative and professional-looking documents. In this lesson, you learn to change the appearance of a document using an existing theme, and then create and customize the theme.

Formatting a Document with a Theme

Predefined formatting preferences enable you to change the overall appearance of the document by selecting and applying a theme. A document theme is a set of predefined formatting options that includes theme colors, fonts, and effects. In this exercise, you learn how to apply a document theme in Word.

Step by step Format a Document with a Theme

GET READY. LAUNCH Word and then **OPEN** the **Hosting** document from the data files for this lesson.

1. On the Design tab, in the Document Formatting group, click **Themes**; the Themes menu appears, as shown in Figure 4-2. This document has already been preformatted with styles.

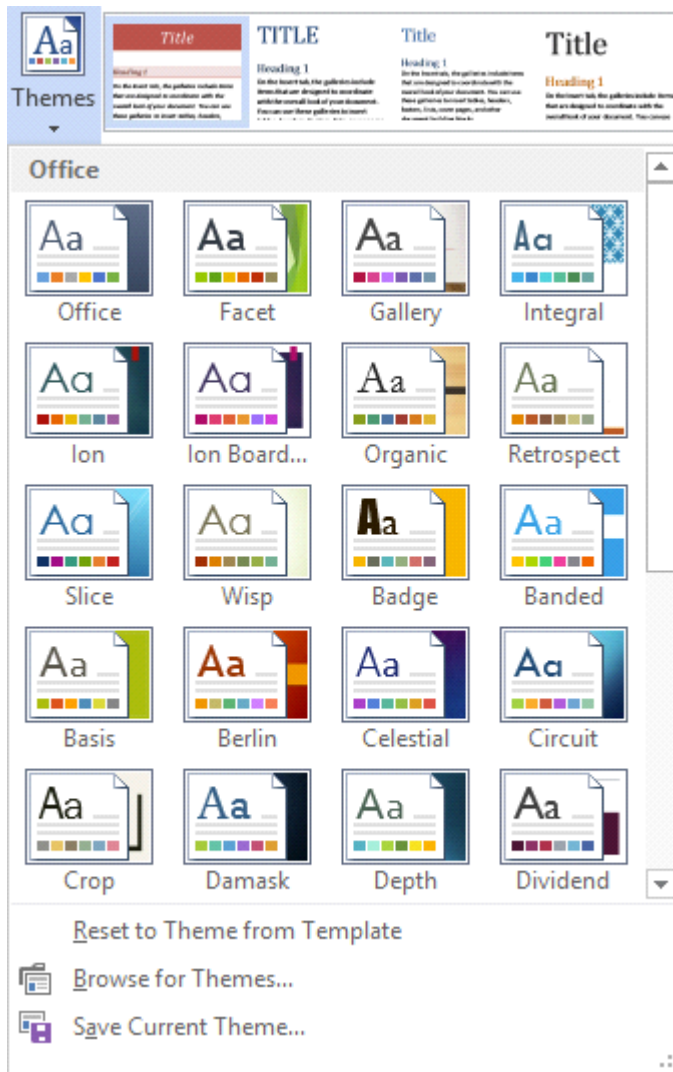


Figure 4-2
Document Themes

Take Note

Applying a theme changes the overall design of the entire document.

2. Click the **View** theme; its component elements are applied to the document. Scroll down and view the changes in the document.
3. **SAVE** the document as **Hosting Term** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Creating and Customizing a Document Theme

In a business environment, a company might want to show consistency by customizing a theme to be used for reports throughout the organization. In this exercise, you create, customize, and apply a new theme to a document.

Step by step Create and Customize a Document Color

GET READY. USE the **Hosting Term** document that is open from the previous exercise.

1. On the Design tab, in the Document Formatting group, click the [Colors](#) button to open the Colors menu (see Figure 4-3). The Colors menu contains sets of predefined formatting colors, with each set containing four text and background colors, six accent colors, and two hyperlink colors. You can also create your own color sets by customizing the existing ones and saving them with a new name.

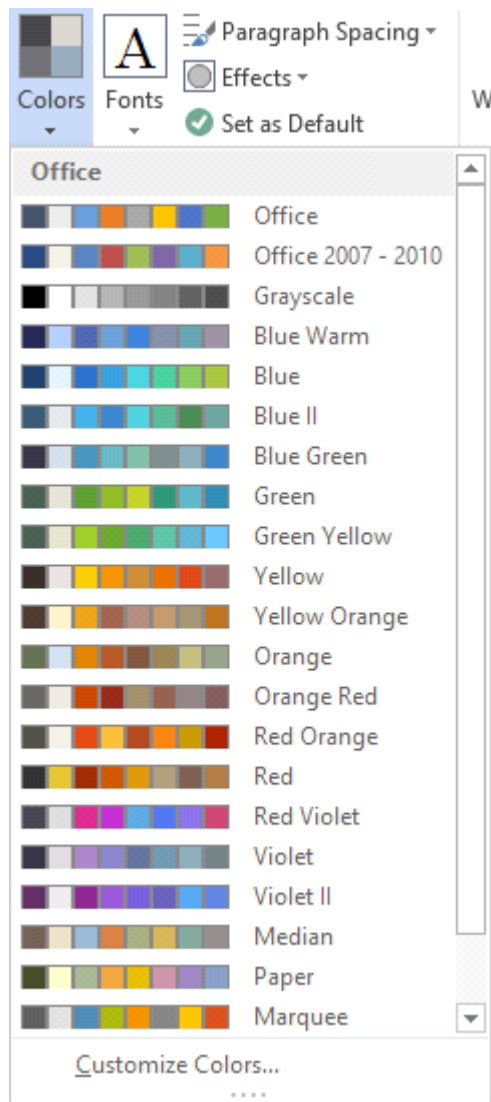


Figure 4-3
Colors menu

2. At the bottom of the Colors menu, click [Customize Colors](#). The *Create New Theme Colors* dialog box appears (see Figure 4-4).

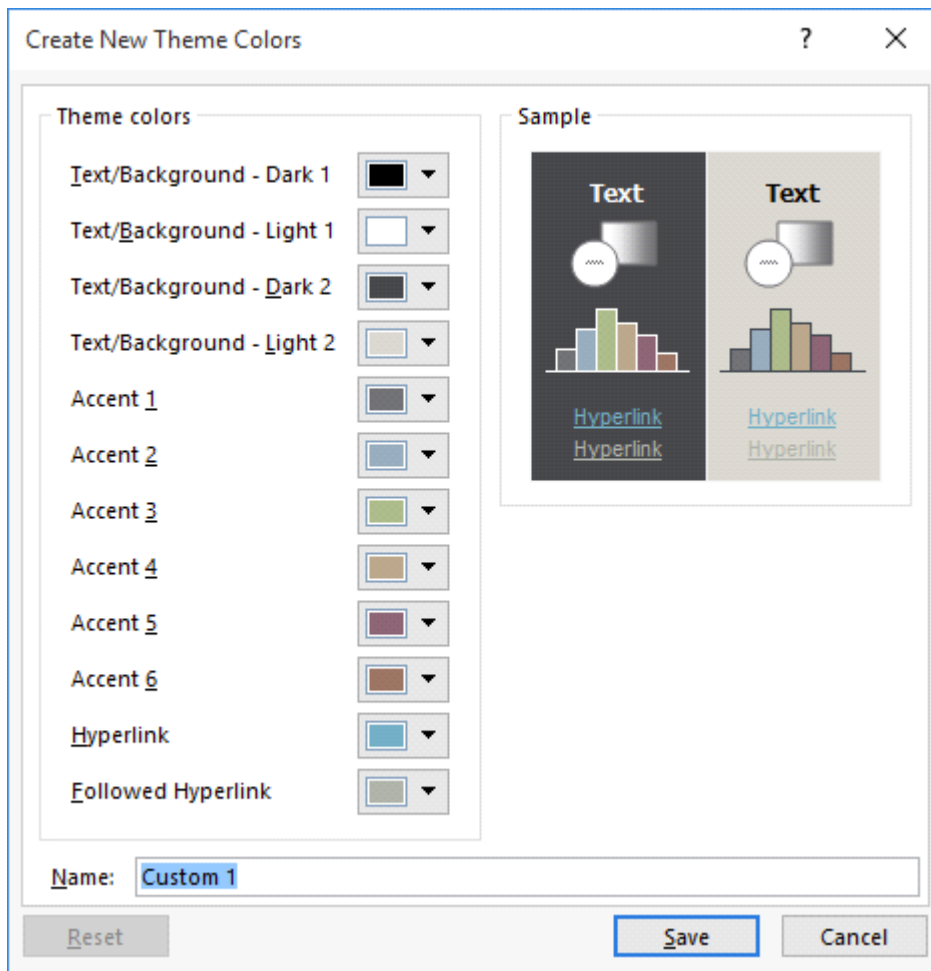


Figure 4-4
Create New Theme Colors dialog box

Take Note

Throughout this chapter, you see information that appears within brackets, such as [your e-mail address]. The information contained in the brackets is intended to be directions for you rather than something you actually type word for word. It instructs you to perform an action or substitute text. Do *not* type the actual text that appears within brackets.

3. In the Name text box, replace the existing name by typing Corporate [your initials].
4. Click Save. The dialog box closes and you have defined a new custom color set based on the default colors.
5. Click Colors and, in the Custom section, right-click the Corporate [your initials] color set you created. On the context menu that appears, click Edit. The Edit Theme Colors dialog box appears.
6. In the list of theme colors, click the Accent 2 drop-down arrow to produce a menu of colors for this element.
7. Select Tan, Accent 4, Darker 50%.
8. Click Save. The title background in the document changes to the color you selected. You have changed the default color to a specific color and created your own custom color set for your document.

9. **SAVE** the document as **Hosting Term 2** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step **Create and Customize a Document Font**

GET READY. USE the **Hosting Term 2** document that is open from the previous exercise.

1. On the Design tab, in the Document Formatting group, click the **Fonts** button. The Fonts menu appears (see Figure 4-5).

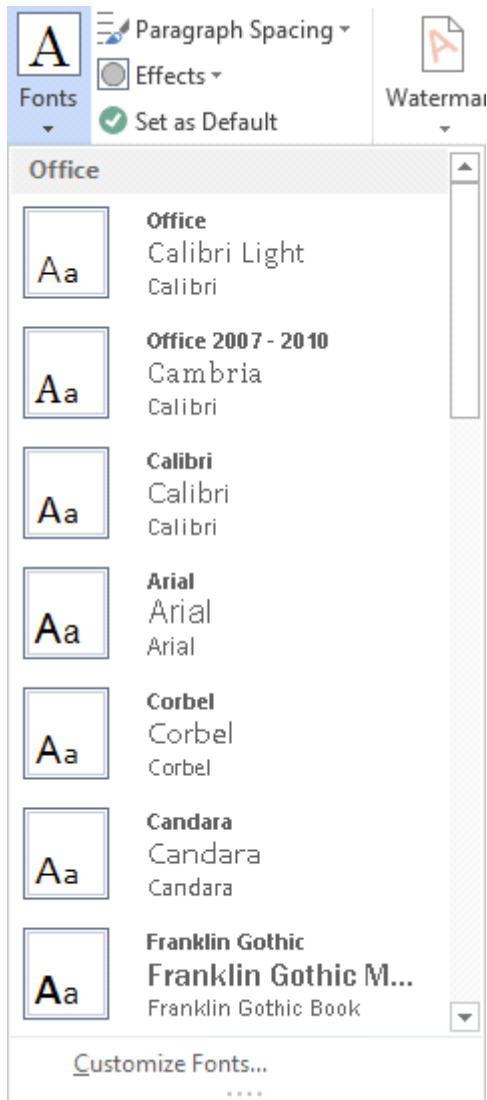


Figure 4-5
Fonts menu

2. Click **Customize Fonts**. The *Create New Theme Fonts* dialog box appears (see Figure 4-6).
3. In the Heading Font and Body Font drop-down lists, select **Arial**. Notice the preview of your font choices that appears in the Sample box.
4. Click **Save** to close the dialog box and apply your font choices to the document.

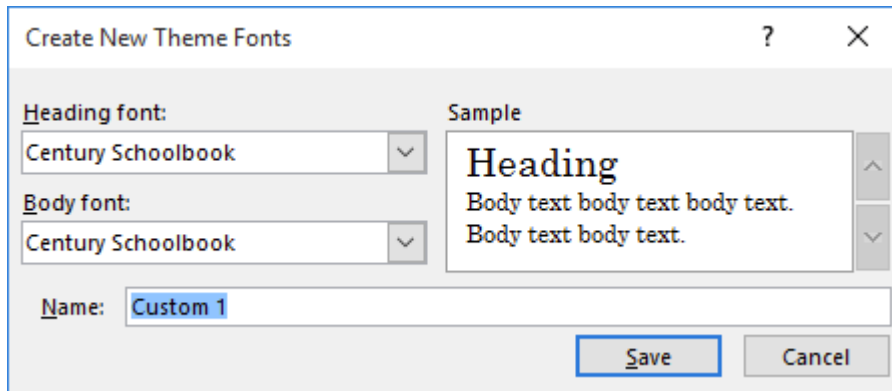


Figure 4-6
Create New Theme Fonts dialog box

5. In the Name text box, replace *Custom 1* by typing **Corporate Fonts [your initials]**.
6. **SAVE** the document as **Hosting Term 3** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

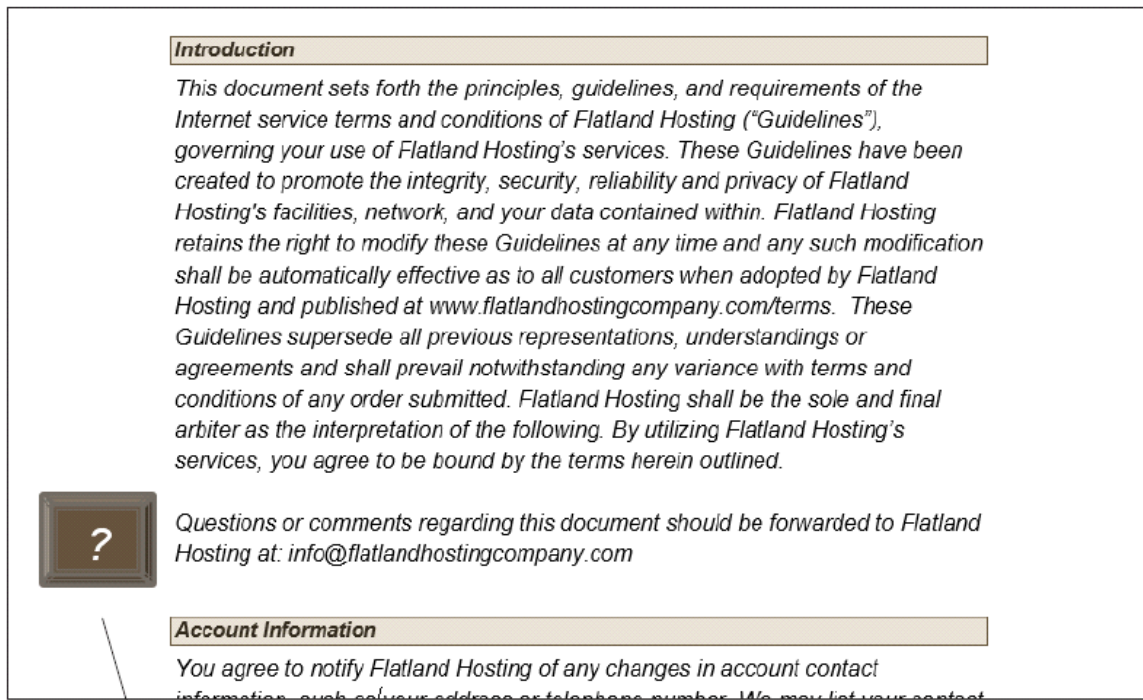
Take Note

A quick way to change fonts is by typing the font name in the Font box.

Step by step Create and Customize Document Effects

GET READY. USE the **Hosting Term 3** document that is open from the previous exercise.

1. Position the insertion point anywhere in the document.
2. On the Design tab, in the Document Formatting group, click the **Effects** button and then select **Glossy** from the menu that appears. When using shapes in your document, such as a bevel shape, the appearance of the shape is based on the effect you have selected. Notice the change in the bevel shape containing the question mark on page 1 (see Figure 4-7).



Bevel with effect

Figure 4-7

Sample bevel shape with effects

3. **SAVE** the document as **Hosting Term 4** in your flash drive in the lesson folder.

PAUSE. LEAVE the document open to use in the next exercise.

Take Note

Document formatting is the same throughout all Office programs, and documents can share the same appearance.

Formatting a Document Using Style Sets

Word 2016 has a group called *Document Formatting* on the Design tab. The Document Formatting group contains many different Style Sets that change the appearance of the entire document.

Applying a Style Set to a Document

Using the Style Gallery on the Home tab, you can apply styles to text. In this section, you apply Style Sets that affect the whole document. These Style Sets are predefined collections of styles with fonts and paragraph spacing defined. You have the option to reset the document back to its default or save a new Style Set. In this exercise, you learn to apply a Style Set.

Style Sets work with +Body and +Headings fonts. Each document has default heading and body fonts that are automatically assigned to the built-in styles, such as Heading 1 and Normal. If you use those built-in styles to format your document, you can change the fonts used in the document by either applying a different theme or theme fonts or by applying a different Style Set.

You can define your own Style Sets. To do so, format the document the way you want it, including your choice of heading and body fonts (from the Fonts drop-down list on the Design tab) and your choice of paragraph indentation and spacing settings for the built-in styles (Normal, Heading 1, Heading 2, and so on). Next, open the Style Set gallery on the Design tab and then click Save as a New Style Set. Style Sets are saved as a template in the C:\Users\username\AppData\Roaming\Microsoft\QuickStyles folder. After you save a Style Set, it appears in a Custom section in the Style Sets gallery.

Step by step Create a Style Set

GET READY. USE the **Hosting Term 4** document that is open from the previous exercise.

1. On the Design tab, in the Document Formatting group, click the **Fonts** button to display the Fonts menu.
2. Right-click the **Corporate Fonts [your initials]** set you created earlier in this lesson and, from the context menu, select **Edit**. The *Edit Theme Fonts* dialog box appears.
3. In the Heading Font drop-down list, select **Arial Black** and then click **Save**.
4. In the Style Set gallery, click the **More** button. The Style Set menu appears (see Figure 4-8).

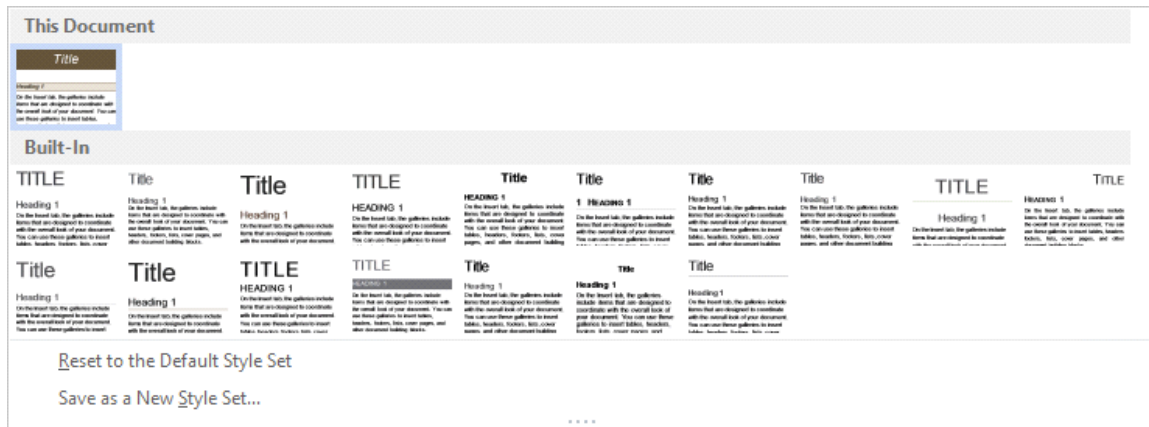


Figure 4-8
Style Set menu

5. Click **Save as a new style set**. The Save as a *New Style Set* dialog box appears.
6. In the File name text box, type **Corporate Style Set [your initials]** and then click **Save**.
7. Click the **More** button again and note how the style set you created now appears in the Custom section.
8. **SAVE** the document as **Hosting Term 5** in your flash drive in the lesson folder.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Apply a Style Set to a Document

GET READY. USE the **Hosting Term 5** document that is open from the previous exercise.

1. On the Design tab, in the Document Formatting group, click a few of the built-in Style Sets in the gallery and watch how the appearance of the document changes.

Take Note

Before you can apply Style Sets, the document must contain styles.

2. Click the **More** button and then select **Lines (Distinctive)** as shown in Figure 4-9.

PRINCIPLES, GUIDELINES, AND REQUIREMENTS OF INTERNET SERVICES

INTRODUCTION

This document sets forth the principles, guidelines, and requirements of the Internet service terms and conditions of Flatland Hosting ("Guidelines"), governing your use of Flatland Hosting's services. These Guidelines have been created to promote the integrity, security, reliability and privacy of Flatland Hosting's facilities, network, and your data contained within. Flatland Hosting retains the right to modify these Guidelines at any time and any such modification shall be automatically effective as to all customers when adopted by Flatland Hosting and published at www.flatlandhostingcompany.com/terms. These Guidelines supersede all previous representations, understandings or agreements and shall prevail notwithstanding any variance with terms and conditions of any order

Figure 4-9

Document with the Lines (Distinctive) style set

3. **SAVE** the document as **Hosting Term 6** in your flash drive in the lesson folder and then **CLOSE** the file.

PAUSE. LEAVE the document open to use in the next exercise.



Troubleshooting

If you apply a different Style Set, as in the preceding exercise, but the document's fonts do not change, it is because the text has been formatted to use a specific font. You can strip off any manual formatting by selecting the text and then pressing Ctrl+Spacebar. Make sure the style applied to the

Formatting a Document Background

Word's enhanced features enable users to produce creatively formatted documents by changing the background color, inserting a watermark, and adding a border to the document. In this section, you learn how to add a background color and insert and remove a watermark.

Inserting a Page Color

Adding a background color to the title page of a report conveys originality. For example, you might want to distinguish your research paper from others by adding a background color to the first page. It is important to use background colors in moderation and to choose a page color that will not interfere with the text. If text is dark, for example, the background color should be light. If text is light, a dark background improves the document's readability. Word also lets you add interesting Fill Effects for the Page Background, such as gradients, textures, patterns, and pictures. In this exercise, you learn

to insert a page color in a document.

Step by step Insert a Page Color

GET READY. OPEN the **Hosting** document from the data files for this lesson.

1. On the Design tab, in the Page Background group, click the **Page Color** button to open the color menu and gallery, as shown in Figure 4-10.



Figure 4-10
Page Color menu

2. Click to select **White, Background 1, Darker 5%**. The color is applied to the page.
3. **SAVE** the document as **Hosting Term 7** in your flash drive in the lesson folder and then **CLOSE** the document.

PAUSE. LEAVE Word open to use in the next exercise.

Inserting a Watermark

In business, some documents might contain sensitive information, and the nature of a document's status should be clearly conveyed on its pages. Word provides built-in text called watermarks that display lightly behind text as words, such as *confidential*, *draft*, or *urgent*. You can customize watermarks to include text or images, including company logos. In this exercise, you learn to insert a watermark using text, an image, and a custom watermark.

Step by step Insert a Watermark

GET READY. OPEN **Hosting Term 6** from the data files for this lesson.

1. On the Design tab, in the Page Background group, click the **Watermark** menu and then select **Confidential 1**. The watermark appears behind the text and is semitransparent.
2. **SAVE** the document as **Hosting Term 8** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Insert a Custom Watermark

GET READY. USE the **Hosting Term 8** document that is open from the previous exercise.

1. Click the **Watermark** menu and then select **Custom Watermark**. The *Printed Watermark* dialog box appears.
2. Select the **Text watermark** option and then in the Text drop-down list, select **Draft**. You can customize text watermarks by typing content in the text box or you can select from the drop-down menu.
3. In the Font drop-down list, select **Franklin Gothic Book**. This changes the text watermark font.
4. In the Color menu, select **Dark Red** in the Standard Colors box (see Figure 4-11).

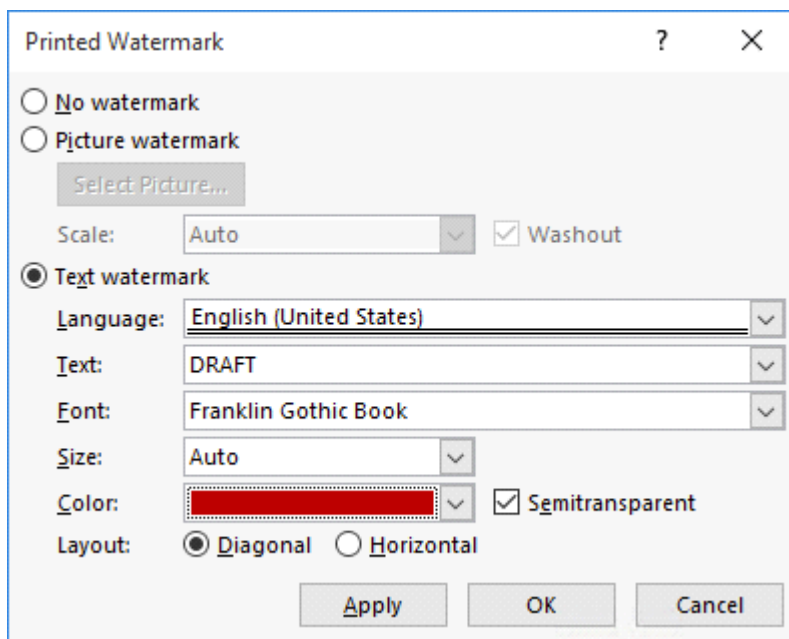


Figure 4-11
Printed Watermark dialog box

5. Click **Apply**. The watermark is inserted on all pages and the dialog box remains open, so you can view your watermark in the document. Click **Close** to close the dialog box and return you to the document screen.
6. **SAVE** the document as **Hosting Draft** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Insert an Image Watermark

GET READY. USE the **Hosting Draft** document that is open from the previous exercise.

1. Click the **Watermark** menu and then select **Custom Watermark**. The *Printed Watermark* dialog box appears.
2. Select the **Picture watermark** option and then click **Select Picture**. The Insert

Pictures window appears.

3. Click the **Browse** button next to From a file and then locate your lesson folder and select **Internet Search**.
4. Click **Insert** to insert the image into the dialog box and then click **OK** to close the *Printed Watermark* dialog box and apply the image as the watermark.
5. **SAVE** the document as **Hosting with Image** in the lesson folder on your flash drive.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Remove a Watermark

GET READY. USE the **Hosting with Image** document that is open from the previous exercise.

1. Open the **Watermark** menu and then select **Remove Watermark**. The watermark is removed from the document.
2. Click the **Undo** button.
3. **SAVE** the document in the lesson folder on your flash drive and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

Software Orientation

Outline View

When you select the Outline view from the View tab, the Outlining tab appears, which contains buttons for working with long documents and arranging the document into smaller sections. The Outlining tab is shown in Figure 4-12.

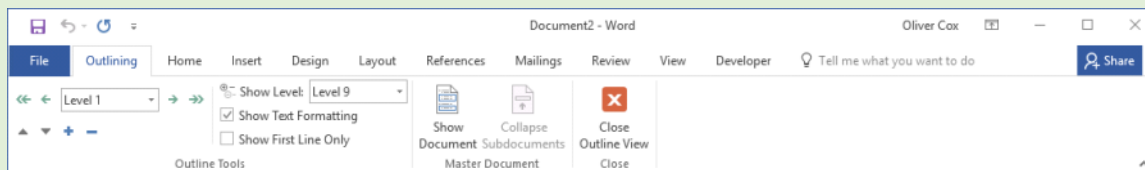


Figure 4-12
Outlining tab

Use this figure as a reference throughout this lesson as well as the rest of this book.

Working with Outlines and Master Documents

When working with large, complex documents, it is useful to create an outline so that you can understand the big picture of the document's organization. As you are planning a new document, you can use Word's Outline tools to plan the overall structure. You can also use master documents and subdocuments to integrate content from multiple separate Word documents into a single linked project.

Creating an Outline

When you create an outline for a document, you list the headings that the document is going to contain. You can then go back into the document later and fill in the body text under those headings.

Outlining a document consists of assigning heading levels to paragraphs (Level 1, Level 2, and so on) to represent their relative positions in the document hierarchy. One way to do this is to assign heading styles to the paragraphs that correspond to those outline levels, like Heading 1, Heading 2, and so on. However, there is an easier way. When you switch to Outline view, you can use the Outlining tab and the Tab and Shift+Tab keyboard shortcuts to quickly assign an outline level and a heading style.

In the following exercise, you will create a new outline.

Step by step Create an Outline

GET READY. CREATE a new blank document.

1. On the View tab, in the Views group, click **Outline**. Word switches to Outline view and the Outlining tab appears on the Ribbon.
2. Type **Chapter 1: The Journey Begins** and then press **Enter**. Because this paragraph is at Level 1 (as you can see from the Outlining level on the Ribbon), it is at the top level of the hierarchy, and Word automatically assigns the Heading 1 style to the paragraph.
3. Press the **Tab** key to demote the new line. Word assigns the Heading 2 style to it, which is a Level 2 style in the outline.
4. Type **Packing the Car** and then press **Enter**.
5. Type **Loading Up the Family** and then press **Enter**. Notice that the outline level of each new paragraph is the same as the outline level of the preceding paragraph.
6. Press **Shift+Tab** to promote the new line. The new line is now at Level 1 in the outline.
7. Type **Chapter 2: We Reach Orlando** and then press **Enter**.
8. Type **Checking In to the Hotel** and then press **Tab** to demote the line. Note that in Outline view, you can press Tab to demote or Shift+Tab to promote a line at any position; the insertion point doesn't have to be at the beginning of the line.
9. Press **Enter** to start a new line, press **Tab** to demote the new line to Level 3, and then type **Reservation Problems!**.
10. Press **Enter** to start a new line and then press **Shift+Tab** twice to promote the new line to Level 1 status.

Take Note

Instead of using Tab and Shift+Tab, you can use the Promote and Demote buttons on the Outlining tab. The Promote button is the left-pointing arrow; the Demote button is the right-pointing arrow.

11. Finish the outline by typing the following. Make the first line Level 1 and all the other lines Level 2.

Chapter 3: Magic Kingdom Adventures

The Ticket Booth

The Shuttle Ride

Shopping!

The Rides

The Parade

The Fireworks

12. Click to the left of the line The Shuttle Ride to select that line and then drag it upwards so that it is above The Ticket Booth. This is one way you can reorder outline items—by dragging.
13. Click in the Shopping! line and then click the **Move Down** button (the down-pointing arrow) on the Outlining tab. This is another way you can reorder outline items.
14. On the Outlining tab, in the **Show Level** drop-down list, choose **Level 1**. The outline collapses to show only the Level 1 headings.
15. Double-click the **plus** sign to the left of the Chapter 3 heading. The subordinate headings below it appear.
16. Press **Ctrl+A** to select the entire outline and then click the **Expand** button (the plus sign) on the Outlining tab to expand the entire outline again (see Figure 4-13).

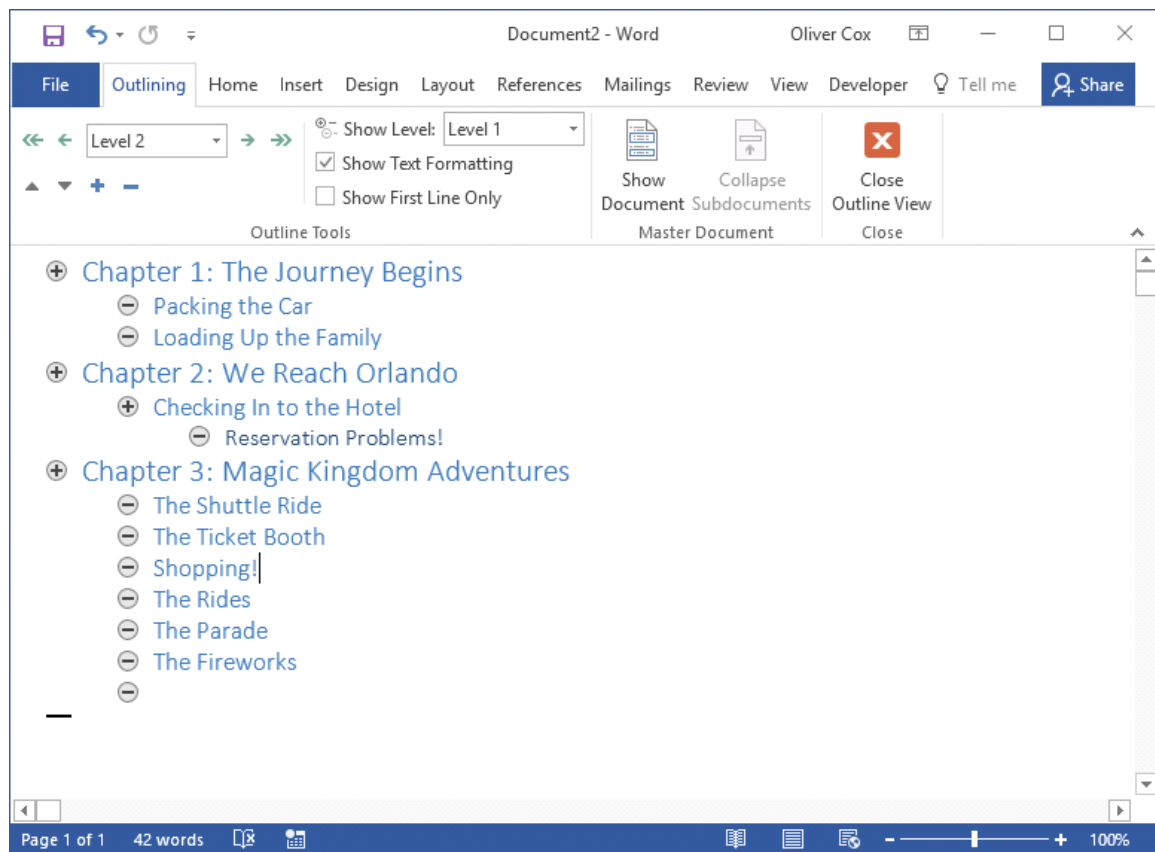


Figure 4-13

Outline view

17. Click the **Close Outline View** button to switch back to Print Layout view. From here you can type the body paragraphs beneath each heading to tell your story.

18. **SAVE** the file as **Vacation Story** in the lesson folder on your flash drive and then **CLOSE** the file.

PAUSE. LEAVE Word open for the next exercise.

Working with a Master and Subdocuments

A master document is the main document created in Word, such as a research paper. A research paper or other long document might contain information such as a title, thesis, introduction, techniques, results, and works cited, to name a few. This document can be 50 pages or more, and scanning through the whole document could be cumbersome. Working with a master document can organize the heading sections into smaller sections called subdocuments, which are sections within the master document that have been separated into subsections. When you create a subdocument, it becomes a separate file from the master, although it still remains linked to the master document. This enables you to open a small 2- or 3-page document for editing, rather than a 50-page document.

For example, you might create a master document for long reports and research papers. When you finish formatting the master document with heading styles, you can create a subdocument for each heading and its content. You create subdocuments based on their heading styles; Word saves the subdocument with the heading as its filename.

As a student, you will most likely have to take a writing class for one of your core courses and prepare a research paper. As you begin working on your research paper, you should outline it to make it more manageable and to keep yourself organized. Working with the master and subdocuments is similar to how you work on sections of your paper. You can edit your whole master document or work in a subdocument as a separate file. When you edit and save subdocuments independently, Word automatically updates the master document because the subdocument is linked to the master. When you later open the master document, all of the editing changes you made in the subdocuments will appear there.

Saving the Master Document

To help you manage a long document, it is best to save the master document and all the subdocuments in the same folder. Creating a folder makes locating subdocuments easy. The document that you will work on is already formatted with heading styles. In this exercise, you learn to create a folder, and then save the master document.

Step by step Save the Master Document

GET READY. OPEN the **Hosting** document from lesson folder.

1. To save the document in a specific folder, click the **File** tab and then click **Save As**. Click **This PC** and then click **Browse**. The **Save As** dialog box appears for you to locate your flash drive
2. Click the **New folder** button located under the address bar, type **Master Hosting**,

- and then press [Enter](#) to accept the new folder name.
3. Double-click the new folder to place it in the address bar.
 4. In the File name text box, type [Master Proposal](#).
 5. Click the [Save](#) button to save the document in the Master Hosting folder.

PAUSE. LEAVE the document open for the next exercise.

Creating Subdocuments

A subdocument is part of the master document, which is separated into small sections. Each subdocument has a unique filename based on the heading style that was applied to it when it was created. This feature is useful for a large research paper or other document; you work on one subdocument section at a time rather than having the whole document open. The first step to creating subdocuments is to identify the levels within the master document, just as you would when creating an outline. For example, using Level 1, Level 2, and Level 3 is similar to creating an outline and identifying headings with Roman numerals I, II, and II.

When formatting your document, you apply a heading style to each new section in your paper. When you are editing subdocuments separately, the master document is automatically updated. The Outlining tab contains the Collapse and Expand subdocument buttons that correlate with the master document. In this exercise, you create subdocuments that are saved separately.

Step by step **Create Subdocuments**

GET READY. USE the [Hosting](#) document that is open from the previous exercise.

1. On the [View](#) tab, in the Views group, click the [Outline](#) button. The Outlining tab appears.
2. On the Outlining tab, in the Outline Tools group, click the [Show Level](#) drop-down arrow and then select [Level 1](#) to make the document more manageable. This document has already been formatted with heading styles; when the levels are changed, the document collapses and only Level 1 displays on the screen as shown in Figure 4-14.

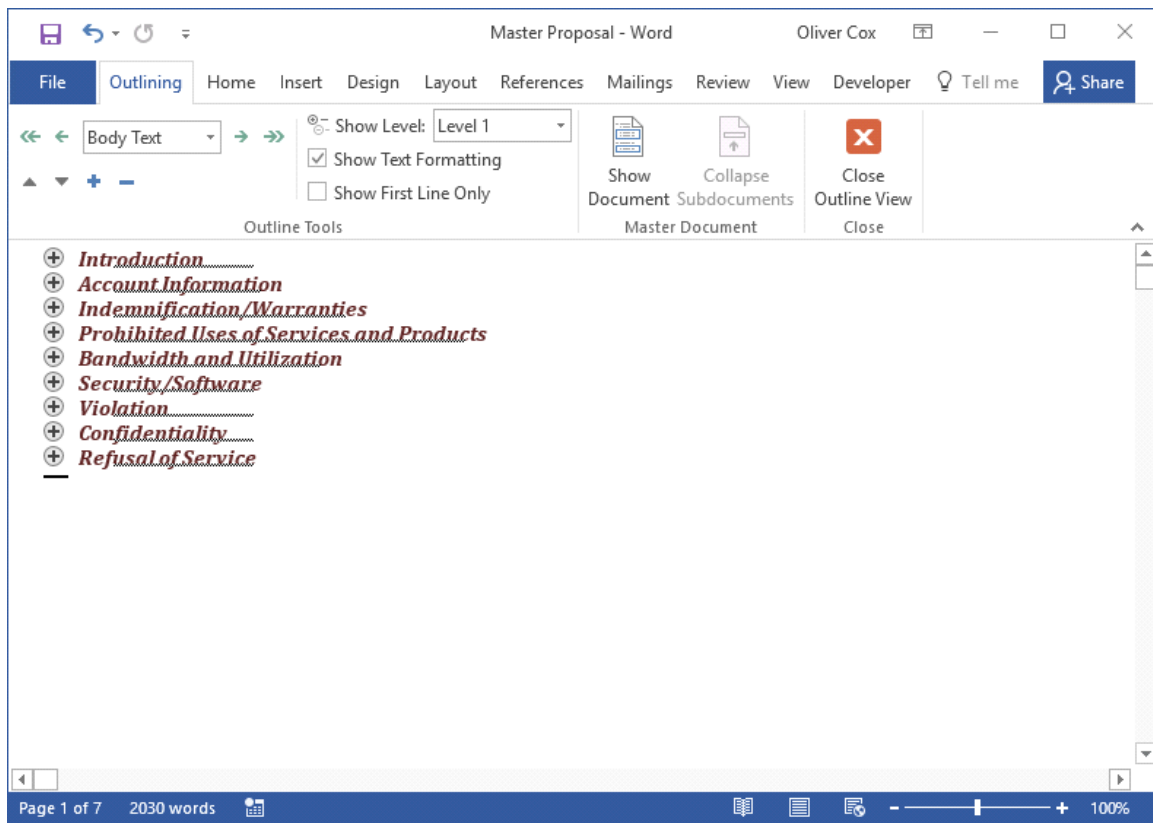


Figure 4-14
Document with Level 1 headings displayed

3. In the Master Document group, click the [Show Document](#) button to display additional commands.
4. Click the [plus \(+\) symbol](#) next to *Introduction* to select the heading. Even though you cannot see it, the content within the heading is also selected.
5. Click the [Create](#) button in the Master Document group to create a subdocument.
6. On the Home tab, in the Paragraph group, click the [Show/Hide](#) button. Notice that *Introduction* has a subdocument icon on the left side and is surrounded by a border with continuous section breaks above and below the heading (see Figure 4-15). The border indicates that this is a subdocument, and the continuous section breaks indicate the beginning and end of the subdocument. Once you create your first subdocument, the Collapse Subdocuments button in the ribbon becomes active.

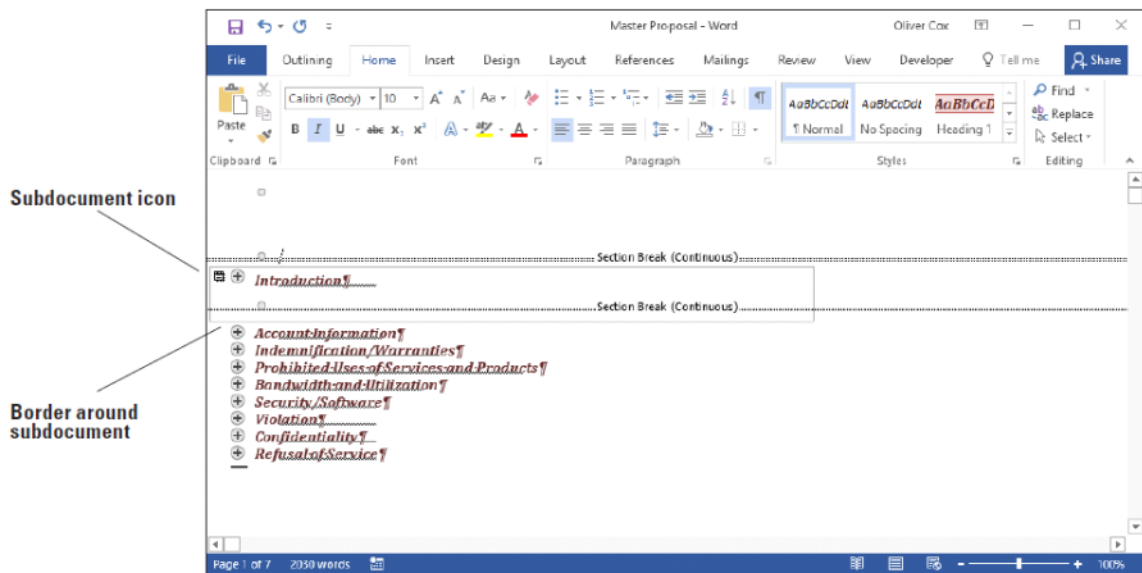


Figure 4-15
Document with one subdocument

7. Select the **plus (+) symbol** next to the *Account Information* heading and, back on the Outlining tab, click the **Create** button. A border appears around the subdocument.
8. Repeat the previous step to create a subdocument from each of the remaining headings: *Indemnification/Warranties*, *Prohibited Uses of Services and Products*, *Bandwidth and Utilization*, *Security/Software*, *Violation*, *Confidentiality*, and *Refusal of Service*. The document should now display as shown in Figure 4-16, with a border around each subdocument continuous section breaks before and after each one.

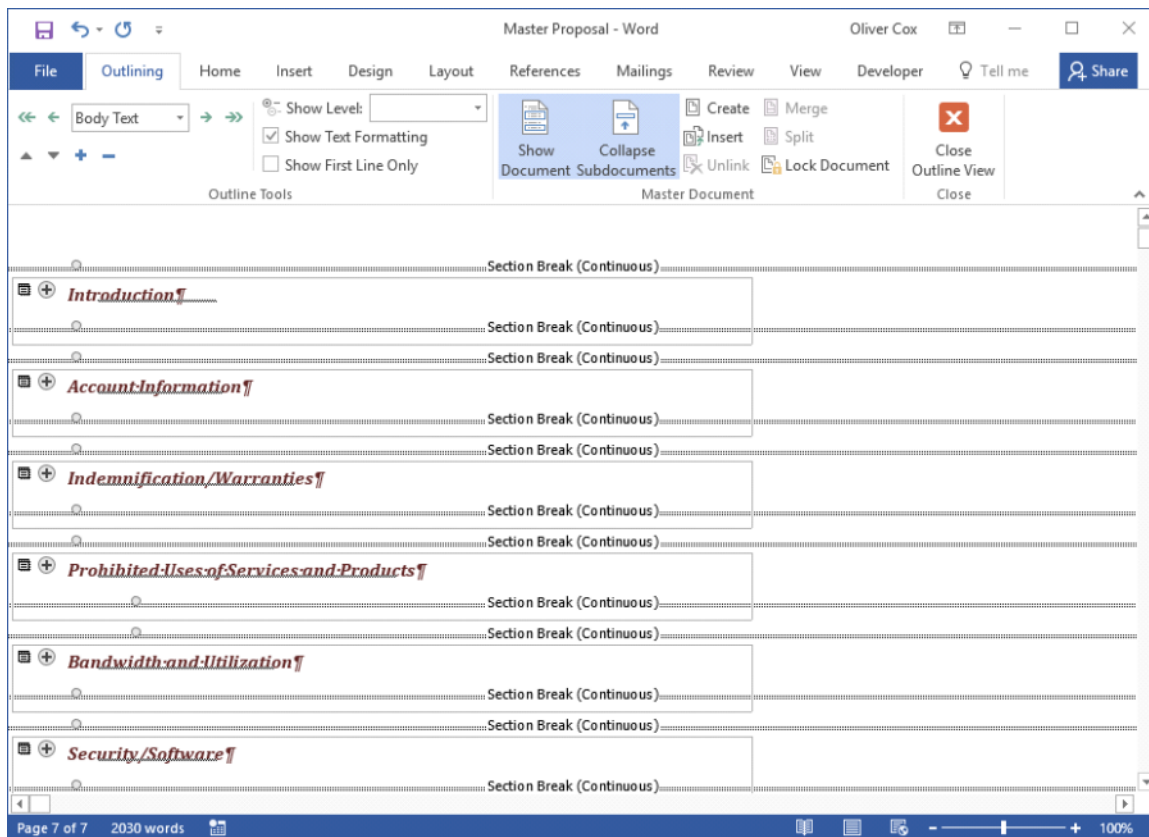


Figure 4-16
Document with multiple subdocuments

PAUSE. LEAVE the document open to use in the next exercise.

Saving Subdocuments

The next step is to save the master document with the subdocuments. Word automatically creates a filename for each of the subdocuments based on the text formatted with the heading styles, and saves each one as a separate file, but in the same folder. For example, the document that you are working on contains many headings with a Heading 1 style applied to them. When you save the master document, each of the headings and the text under the heading is saved as a separate file automatically. In this exercise, you learn to save the master document with the subdocuments.

Step by step Save Subdocuments

GET READY. USE the **Hosting** document that is open from the previous exercise.

1. Click the **Save** button on the Quick Access Toolbar to save the **Master Proposal** document and the subdocuments you created.
2. **CLOSE** all open documents.
3. Open File Explorer and browse to the Master Hosting folder you created earlier (see Figure 4-17). Notice that Word has saved each subdocument as a separate file based on the heading style (Heading 1) that was applied to the document. Each of the subdocuments is linked to the master document.

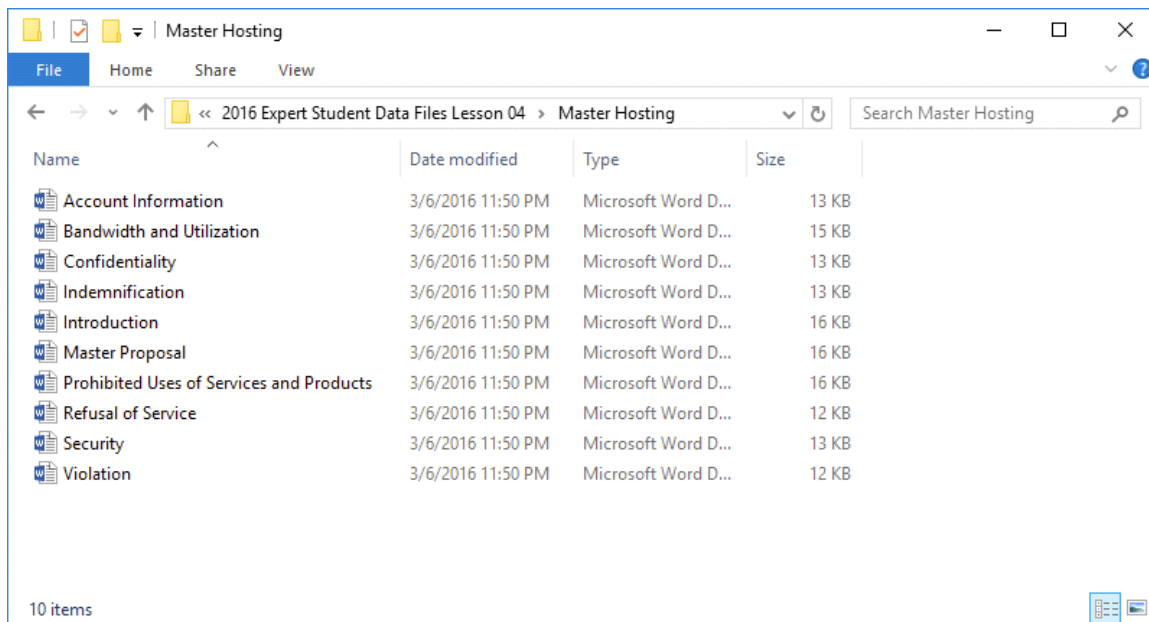


Figure 4-17
Contents of Master Hosting folder

PAUSE. LEAVE the document open to use in the next exercise.

Promoting and Demoting Subdocuments

When you rearrange levels in a master document, you move the subdocument heading to another level by using the commands in the Outlining tab to either promote or demote the level. For instance, to move a topic in the paper to a location under another heading, you demote that topic heading. As you continue working on your paper, you might come to realize that the Heading 1 style applied to one of the headings should be a Heading 2. In the Outlining tab, you can change the level of a heading by using the promote or demote button. It is easy to demote a Level 1 to a Level 2 or vice versa. So in this case, you demote the Level 1 to a Level 2. In this exercise, you learn to use promote and demote buttons.

Step by step Promote and Demote Subdocuments

GET READY. OPEN the **Master Proposal** document from the previous exercise.

1. On the Outlining tab, in the Master Document group, click the **Collapse Subdocuments** button. The document now displays the paths to the subdocument files you created.
2. Click the **Expand Subdocuments** button to display the text of all the subdocuments.
3. Point at the **plus (+) symbol** next to the *Account Information* heading—notice that the mouse pointer changes to four arrows.
4. Click the **plus (+) symbol** once to select the heading and all the contents within the subdocument.
5. In the Outline Tools group, click the **Demote** button once. The *Account Information* heading has been demoted to a Level 2, as shown in Figure 4-18.
6. With the *Account Information* subdocument still selected, click the **Promote** arrow once. The *Account Information* section has been promoted back to a Level 1.

Demote it back to a Level 2.

7. Click the **Save** button on the Quick Access Toolbar. The master document is saved with the updated changes.

PAUSE. LEAVE the document open to use in the next exercise.

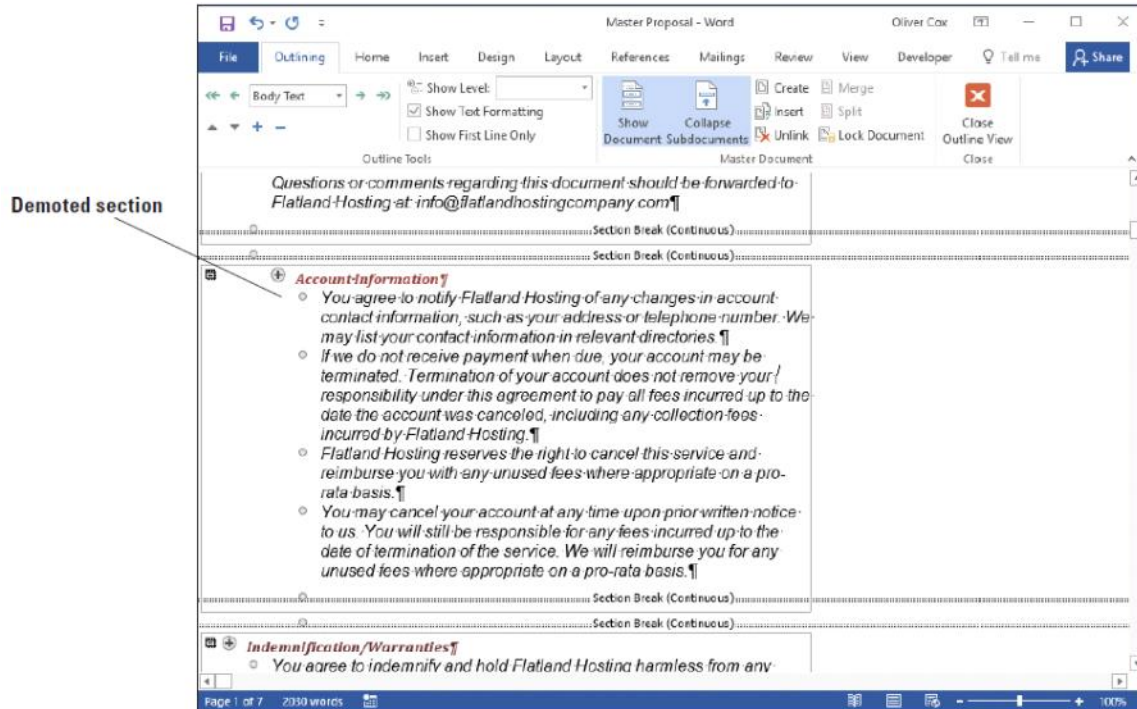


Figure 4-18
Heading demoted

Reorganizing Subdocuments

You can rearrange subdocuments within the master document. You change the order of subdocuments by moving them from one location to another using the command buttons on the Outlining tab or by dragging and dropping. Once you move a subdocument, you must unlink it and recreate it. You can also merge two or more subdocuments into one subdocument. In this exercise, you reorganize subdocuments.

Step by step Reorganize Subdocuments

GET READY. USE the **Master Proposal** document that is open from the previous exercise.

1. Deselect the *Account Information* section by clicking in a blank area of the document screen.
2. On the Outlining tab, in the Outline Tools group, select the **Show First Line Only** checkbox. This displays the first line of each paragraph in each of the subdocuments and hides the remaining content—making the subdocuments more manageable.
3. Scroll down and then click to select the **plus (+) symbol** by the Security/Software

heading and its contents.

4. Click the **Show Document** button to display the additional commands in the Master Document group.
5. In the Outline Tools group, click the **Move Down** button four times, until the heading is positioned below the Violation heading. There should be two continuous section breaks above Security/Software.
6. The Security/Software subdocument is now surrounded by a border that also encompasses the *Confidentiality* subdocument.
7. **Delete** the two continuous section breaks under the Security/Software and Confidentiality sections. Deleting these continuous section breaks makes it easy to unlink the subdocuments.

PAUSE. LEAVE the document open to use in the next exercise.

Step by step Unlink Subdocuments

GET READY. USE the **Master Proposal** document that is open from the previous exercise.

Currently, the Security/Software and Confidentiality sections are located in a single subdocument. There is therefore only one subdocument icon for both levels, as shown in Figure 4-19. Both of these subdocuments are linked to the master document and must first be unlinked before you can create a separate subdocument for each section.

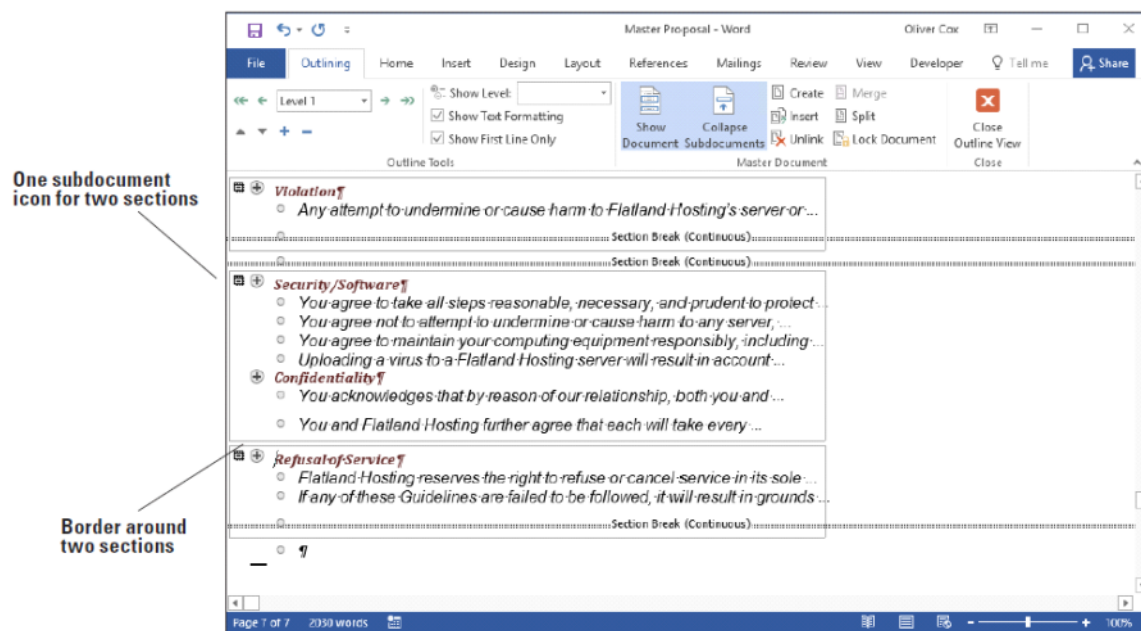
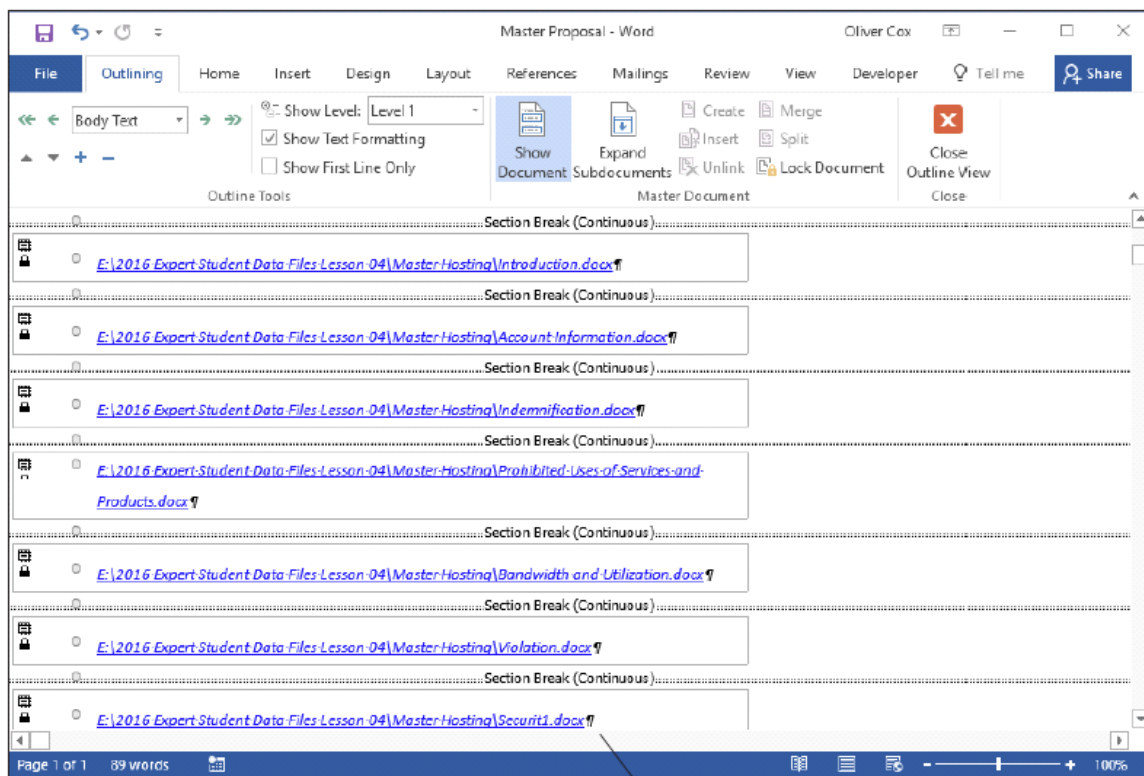


Figure 4-19
Repositioned subdocuments

1. Click the **plus (+)** symbol by *Security/Software* to select it and then click the **Unlink** button. The subdocument icon disappears.
2. Click the **Create** button to create a subdocument. This places a border around this level (only) and the subdocument icon appears.

3. Click the **plus (+) symbol** by *Confidentiality* and then click **Create**.
4. Clear the **Show First Line Only** checkbox.
5. In the Show Level drop-down list, select **Level 1**.
6. Click the **Collapse Subdocuments** button and a prompt appears, asking *Do you want to save changes to the master document "Master Proposal?"* Click **OK**. Your screen should match Figure 4-20. Word automatically saves the modified subdocuments with new filenames, dropping the last character of the original filename and appending a *1* at the end. The two additional files that you see in your Master Hosting folder are *Securit1* and *Confidentialit1*. Each time you create a new subdocument, it is automatically linked to the master document, and the original subdocuments are no longer linked to the master document.



Subdocument with new filename

Figure 4-20
Master document with hyperlinks with repositioned subdocuments

PAUSE. LEAVE the document open to use in the next exercise.

Editing an Individual Subdocument

You can edit subdocuments directly within the master document, or you can open the subdocument as a separate file in its own window. In this exercise, you edit a subdocument both separately and within the master document.

Step by step **Edit an Individual Subdocument**

GET READY. USE the **Master Proposal** document that is open from the previous

exercise.

1. Point to the *Master Hosting/Introduction* subdocument hyperlink and press **Ctrl+Click** to follow the hyperlink. The subdocument opens in a separate window. It is now ready for editing and formatting.
2. In the first and second sentences, select the words *principles*, *guidelines*, and *requirements* from the first sentence and *integrity*, *security*, *reliability*, and *privacy* from the second sentence. All seven words should be selected.
3. Bold the selected text and then change the font color to **dark red**.
4. Click **Save** on the Quick Access Toolbar. Then, close the *Introduction* subdocument file.
5. Click the **Outlining** tab to make it available with its commands.
6. On the Outlining tab, in the Master Document group, click the **Expand Subdocuments** button. Notice the bolded, dark red text under the *Introduction* heading. The changes you made in the *Introduction* subdocument automatically appear in the master document.
7. Click the **Close Outline View** button to take you to the Print Layout view.
8. In the *Prohibited Uses of Services and Products* section, select the second paragraph.
9. On the Design tab, in the Page Background group, click **Page Borders**. The *Borders and Shading* dialog box appears.
10. Select the Borders tab, and in the Setting section, select **Shadow**. Change the Width setting to **2¼ pts** and then apply the **Red, Accent 2** color setting.
11. Click the **Shading** tab and then select the Fill color **Red, Accent 2, Lighter 80%**.
12. Click **OK**. A colored border with a 2¼ pts width is applied to the paragraph and a shading is applied to the paragraph within the border.
13. **SAVE** the **Master Proposal** document and then **CLOSE** the file. You have completed editing the master document.
14. **OPEN** the **Prohibited Uses of Services and Products** subdocument from the Master Hosting folder. The changes that you made are shown in the subdocument, as shown in Figure 4-21.

Prohibited Uses of Services and Products ¶

Flatland Hosting's services may only be used for lawful purposes. Transmission of any material in violation of any U.S. or state regulation is prohibited. This includes, but is not limited to: copyrighted material, threatening or obscene material, or material protected by trade secrets. You agree to indemnify and hold harmless Flatland Hosting from any claims resulting from your use of this service which damages you or another party. At our discretion, we may revoke your Web space for inappropriate usage. Web server space and e-mail accounts may not be resold. ¶

Some of the information available on our system is covered by copyright. Unless you have permission from the copyright holder, you are not allowed to redistribute this information to others, including use of this information for radio, television or printed media, such as newspapers, magazines or newsletters. ¶

In addition to the other requirements of these Guidelines, you may only use this service in a manner that, in Flatland Hosting's sole judgment, is consistent with the purposes of this service. If you are unsure of whether any contemplated use or action is permitted, please contact Flatland Hosting. By way of example, and not limitation, uses described below of this service are expressly prohibited. ¶

Figure 4-21

Subdocument with changes

15. **CLOSE** the document.

STOP. CLOSE Word.

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. By default, how many levels does the Outline View contain?
 - a. Nine
 - b. Eight
 - c. Seven
 - d. Five
2. Clicking the Show Document button in the Outlining tab displays which of the following?
 - a. Backstage view
 - b. more commands
 - c. Collapse Subdocuments
 - d. None of the above
3. Which of the following statements is correct?
 - a. Clicking the Expand button shows all the text in the subdocument
 - b. Clicking the Expand button closes the subdocument
 - c. Clicking the Expand button opens only the selected content
 - d. Both A and C are correct.
4. A document theme includes sets of which of the following?
 - a. Colors
 - b. Fonts
 - c. Effects
 - d. All of the above
5. To preview a style or a theme, you must do which of the following?
 - a. Place your mouse pointer over the choice
 - b. Print the document
 - c. Set up the document properties
 - d. It is not possible to preview a style or theme

True/False

Circle T if the statement is true or F if the statement is false.

- T F** 1. A subdocument contains the whole document.
- T F** 2. Macros will not automate tasks.
- T F** 3. When you create subdocuments, they are saved with the master document.
- T F** 4. When recording a macro, you can format a document with many features to enhance the document.
- T F** 5. When assigning a name to a macro, spaces can be used.

Projects

Project 4-1: Creating Elevator Communications

Montgomery, Slade & Parker uses elevator communications for in-house announcements, invitations, and other employee-relations documents. In each elevator, a durable 8½" × 14" clear plastic frame has been installed in which announcements can be inserted and changed on a regular basis. Create a draft document for approval that recognizes employee award winners and invites employees to a reception to honor these award winners.

GET READY. LAUNCH Word if it is not already running.

1. **OPEN** *Congratulations* from the data files for this lesson.
2. **SAVE** the document as *4-1 Congratulations Reception* in the lesson folder on your flash drive.
3. On the Design tab, in the Page Background group, click the **Page Color** button. In the Theme Colors section, select **Olive Green, Accent 3, Lighter 80%**.
4. Click the **Page Borders** button. In the *Borders and Shading* dialog box, click **Shadow** in the Setting section. In the Width drop-down list, select **3 pt**. In the Color menu, select **Olive Green, Accent 3, Darker 50%**. Click **OK** to apply the changes to the whole document.
5. On the Layout tab, in the Page Setup group, click the **Size** menu and then select **Legal**. The legal option may not be included in the menu if you don't have a printer that uses legal sized paper; if not, just skip this step.
6. Open the *Page Setup* dialog box and, on the **Layout** tab, change the Vertical Alignment to **Center**. Click **OK**.
7. Select *Congratulations!* Change the font color to **Olive Green, Accent 3, Darker 50%** to match the page border.
8. On the Design tab, in the Page Background group, click the **Watermark** button and then select **Custom Watermark**. The *Printed Watermark* dialog box opens.
9. Select the **Text watermark** option and, in the Text drop-down list, select **Draft**.
10. Customize the watermark by changing the color to dark red and then click **OK**.
11. **SAVE** the document in the lesson folder on your flash drive and then **CLOSE** the file.

Pause. LEAVE Word open for the next project.

Project 4-2: Creating Separate Files for the Books and Beyond Master Document

In this project, you work at Books and Beyond and your manager has asked you to work with this document and create separate files from the master document. In your computer class, you learned about master documents and how Word automatically saves subdocuments.

GET READY. LAUNCH Word if not already running.

1. **OPEN** **Books Beyond** from the lesson folder.
2. On the File tab, click **Save As**.
3. Click **Browse** and use the scroll bar to locate your flash drive. In the *Save As* dialog box, click **New folder** and name it **Books Beyond**.
4. In the File name text box, type **Master Books** and save it in the Books Beyond folder.
5. Select the *Acknowledgement* heading and format it with the **Heading 1** style.
6. Select the *Introduction* heading and format it with the **Heading 1** style.
7. Select the *General Performance Expectation Guidelines* heading and format it with the **Heading 1 style**.
8. On the View tab, click the **Outline** button.
9. On the Outlining tab, in the Outline Tools group, in the *Show Level* drop-down list, select **Level 1**.
10. Click the **plus (+) symbol** next to *General Performance Expectation Guidelines*.
11. Click the **Demote** button to change the level for *the General Performance Expectation Guidelines* heading. The heading is now a Level 2.
12. Click the **Show Document** button.
13. Select the **plus (+) symbol** next to *Acknowledgement* to select the heading and the contents under that heading.
14. In the Master Document group, click the **Create** button.
15. Click the **plus (+) symbol** by *Introduction* to select the heading and the contents under that heading.
16. Click the **Create** button in the Master Document group.
17. Click the **Save** button on the Quick Access Toolbar and then **CLOSE** the file.
18. **OPEN** the **Master Books** document and then preview your document in Print Layout view. You should see two hyperlinks. **CLOSE** the file.

CLOSE Word.