

Using Macros, QuickParts, and Content Links

Lesson Skill Matrix

| Skill | Exam Objective | Objective Number |
|------------------|--|------------------|
| Using Macros | Create and modify simple macros. | 4.1.3 |
| | Enable macros in a document. | 1.1.6 |
| | Display hidden ribbon tabs. | 1.1.7 |
| | Copy custom styles, macros, and building blocks to other documents or templates. | 1.1.2 |
| Using QuickParts | Create QuickParts. | 4.1.1 |
| | Manage building blocks. | 4.1.2 |
| | Copy custom styles, macros, and building blocks to other documents or templates. | 1.1.2 |
| Linking Content | Link to external document content. | 1.1.5 |

Using Macros

A macro is a recorded sequence of commands to automate a task. It is a series of commands and actions that you can record and run whenever you need to perform the task. When you create a macro, you can run it manually or assign it to run whenever a specific key or series of keystrokes are pressed.

Take Note

A keyboard shortcut is a combination of two or more keys to perform a specific action. You might have already applied a keyboard shortcut to open a new document by pressing **Ctrl+N** or to bold text by pressing **Ctrl+B**. Word contains many preconfigured shortcuts, which are already assigned to a specific action. Therefore, you cannot use them for your own customized shortcuts.

Step by step Assign Shortcut Keys

GET READY. LAUNCH Word and **CREATE** a new blank document.

1. On the View tab, click the **Macros** drop-down arrow to open its menu (see Figure 5-1).

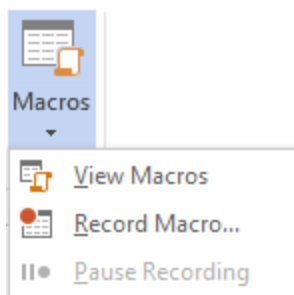


Figure 5-1
Macros menu

2. Click **Record Macro** to open the *Record Macro* dialog box (see Figure 5-2). In the dialog box, you need to specify a name for the macro and decide which option to use to assign a macro. You have two choices. You can assign a macro by button or by keyboard.

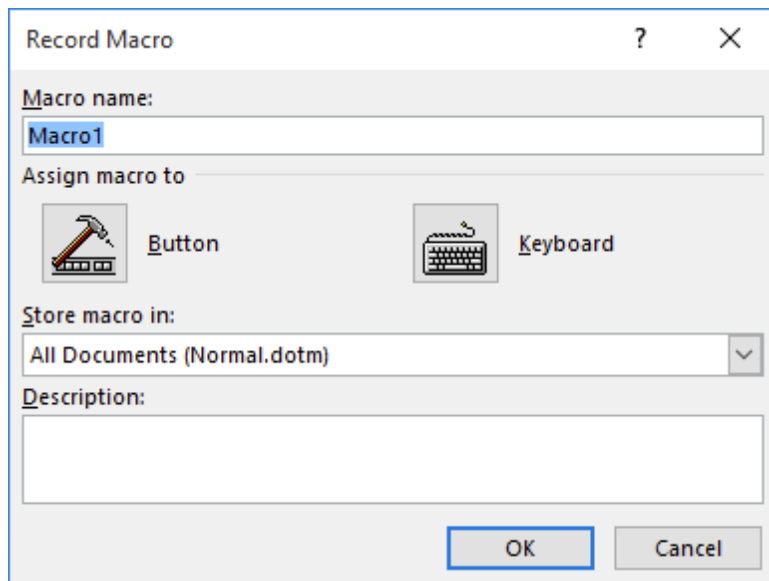


Figure 5-2
Record Macro dialog box

3. In the Macro name text box, type [Upcoming_Workshops](#). Spaces are not allowed; you must add an underscore.
4. Leave the default setting for the Store macro in drop-down list. The macro will be stored in All Documents (Normal.dotm). You want it stored there because you will need to access this macro on a monthly basis. If someone else is working on the computer and you've provided the person with the keyboard shortcut, he or she can access the macro also.

Take Note

The Normal.dotx template is the default template that Word 2016 attaches to any document you create or open. As long as you save your macro to that template, it will always be accessible in any document you open on that computer. If you save the macro to the new document you just created instead, then the macro will only be available in that document, but you will be able to copy it to any location and run it on any computer.

5. In the Description text box, type [Use this table for all upcoming workshops](#).
6. Click the [Keyboard](#) button to open the *Customize Keyboard* dialog box as shown in Figure 5-3.

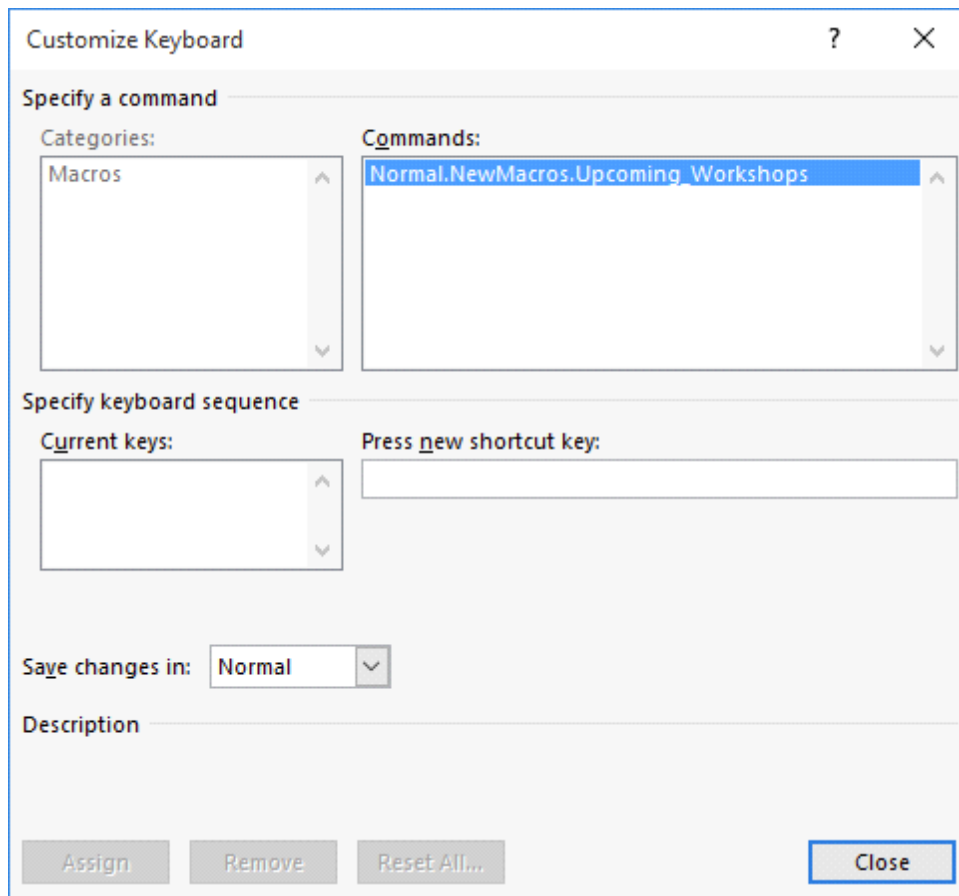


Figure 5-3
Customize Keyboard dialog box

7. In the Press new shortcut key box, press **Ctrl+T**. This shortcut key is already assigned to the HangingIndent command, as shown in the dialog box.
8. Press **Backspace** to remove Ctrl+T.
9. Press **Ctrl+Alt+T**. This shortcut key is already taken by the TM Trademark command. It may take several attempts to find an unassigned shortcut key.
10. Press **Backspace** to remove Ctrl+Alt+T.
11. Press **Alt+T**. Notice that this keystroke is not assigned.
12. Click the **Assign** button to assign this shortcut key to the new macro. The Alt+T command is moved to the *Current keys* box for this macro.

Take Note

Word allows you to override assigned keyboard shortcuts, but this practice is not recommended, unless you are certain that no one using the computer will need them. The best practice is to find one that is unassigned.

13. Click **Close**. The changes will be assigned in the Normal template instead of Document1. This saves the macro on the computer where you are recording the macro. It can then be accessed by anyone who is working on that computer.

PAUSE. LEAVE Word open for the next exercise.

Recording a Macro

Once you determine which method you will use to assign the macro, the next step is recording your steps. While Word is recording a macro, you see the mouse pointer change to a recording pointer on your screen. At this point, every keystroke and mouse click is recorded. When working with macros, you cannot use the mouse to select text. In this exercise, you learn to record your steps to create and format a table.

The Record button has been enabled in the previous procedure; you should see the mouse pointer change to a recording pointer on your screen. As long as you see the icon on your document screen, you are still recording your steps. If you need to take a break, or do something that you do not want recorded, click the Pause Recording command in the Macros menu. If you pause during a macro, you can resume by clicking Resume Recorder.

Step by step Record a Macro

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

1. On the Insert tab, in the Tables group, click the **Table** down-arrow and then click **Insert Table**. The *Insert Table* dialog box appears (see Figure 5-4).

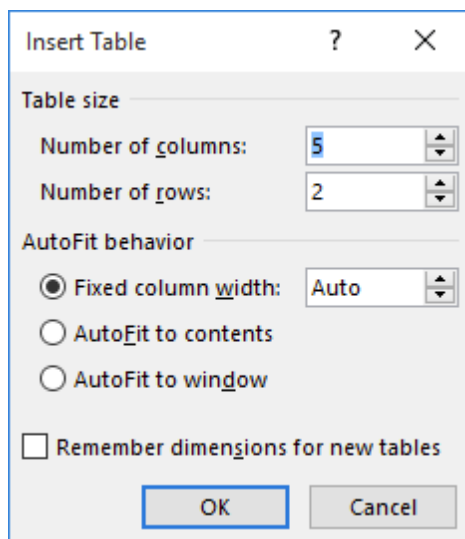


Figure 5-4
Insert Table dialog box

2. Create a table that contains 4 columns and 7 rows. Click **OK**. The new table appears in the document.
3. Type the information shown in Table 5-1. Because you are recording a macro, you must press **Tab** to move to the next cell and then press **Shift+Tab** to move back to the previous cell.

| Workshop Name | Date | City | Cost |
|---------------|-------------------|-----------------|-------|
| Word 2016 | February 20, 20XX | San Antonio, TX | \$495 |
| Excel 2016 | March 15, 20XX | Dallas, TX | \$495 |

| | | | |
|-----------------|----------------|-----------------|-------|
| PowerPoint 2016 | April 28, 20XX | Frisco, TX | \$495 |
| Access 2016 | May 15, 20XX | San Antonio, TX | \$495 |
| Outlook 2016 | June 11, 20XX | Austin, TX | \$495 |
| MOS Exams | July 30, 20XX | San Antonio, TX | \$650 |

Table 5-1
Workshop Information

4. After you type the data, on the Table Tools - Layout tab, in the Table group, click the **Select** down-arrow and then click **Select Table**. The entire table is now selected. While you are recording a macro, you cannot use your mouse to select text or tables.
5. On the Table Tools - Design tab, in the Table Styles group, click the **More** down-arrow to display the gallery.
6. In the Grid Tables group, select **Grid Table 4 - Accent 6** to apply a style to the table.
7. Use the arrow keys on the keyboard to move up to the first row, containing the headings.
8. On the Table Tools - Layout tab, in the Table group, click the **Select** down-arrow and then click **Select Row**.
9. In the Alignment group, click **Align Center**. The table now appears as shown in Figure 5-5.

| Workshop Name | Date | City | Cost |
|-----------------|-------------------|-----------------|-------|
| Word 2016 | February 20, 20XX | San Antonio, TX | \$495 |
| Excel 2016 | March 15, 20XX | Dallas, TX | \$495 |
| PowerPoint 2016 | April 28, 20XX | Frisco, TX | \$495 |
| Access 2016 | May 15, 20XX | San Antonio, TX | \$495 |
| Outlook 2016 | June 11, 20XX | Austin, TX | \$495 |
| MOS Exams | July 30, 20XX | San Antonio, TX | \$650 |

Figure 5-5
Upcoming Workshop document

10. The next step is to stop recording. On the View tab, click the **Macros** down-arrow and then click **Stop Recording**.

Take Note

After recording your first macro, you can access it quickly using the keyboard shortcut you specified. If you share your computer with another individual, this person too can use the keyboard shortcut to apply the macro, as long as you

provide the person with the shortcut key. You can use this table for all upcoming workshops—all you have to do is change the data.

11. **CLOSE** the document without saving it.

PAUSE. LEAVE Word open for the next exercise.

Running a Macro

Once you have recorded a macro and saved it to the Normal template, you can press the keyboard shortcut to run it in any blank or existing document. In this exercise, you learn to run your macro in a blank document.

Step by step Run a Macro

GET READY. CREATE a new blank document.

1. Press **Alt+T**. The table automatically appears in your document. When you need to work with this table, you can now access it quickly, edit the data, and then save the document with a new filename.
2. **SAVE** the document as **Upcoming Workshops** in the lesson folder on your flash drive and then **CLOSE** the file.
3. Now, let's run the macro again another way. **OPEN** a blank document.
4. On the View tab, click the **Macros** down-arrow and then click **View Macros** to open the *Macros* dialog box (see Figure 5-6).

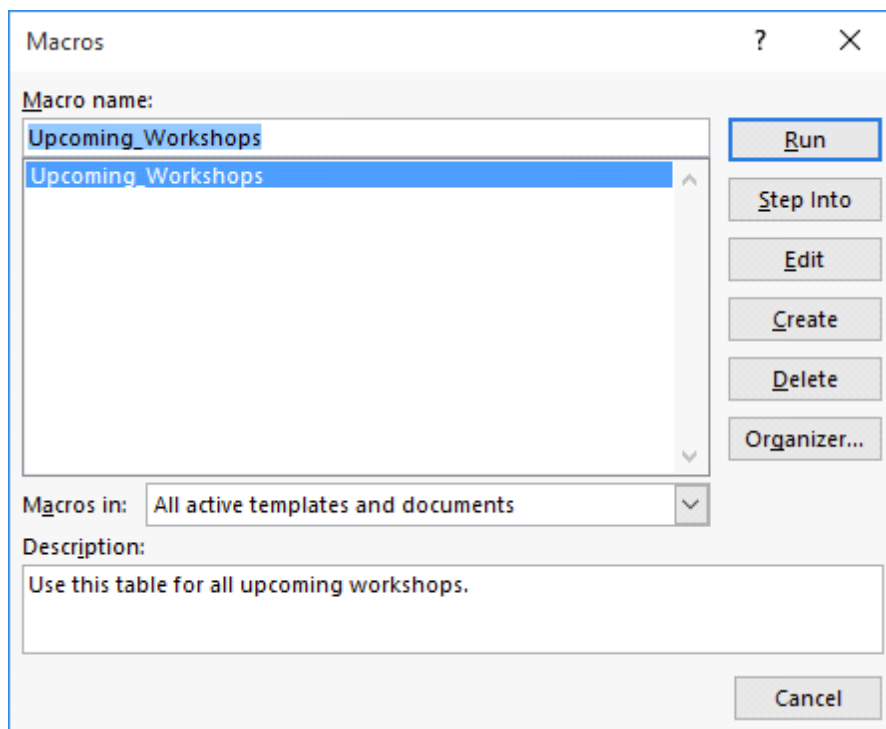


Figure 5-6
Macros dialog box

5. With the `Upcoming_Workshops` macro selected by default, click **Run**. The table

appears in the document.

6. **CLOSE** the document without saving.

PAUSE. LEAVE Word open for the next exercise.

Software Orientation

Controlling Macro Security

Macros can streamline your work, but you must also be concerned about how security works with macros. Macro security is concerned with active content in files that might come from a site that has no digital signature or from someone who has written malevolent code. If someone sends you a document that contains macros with active content, it might pose a security risk and harm your computer. A hacker is a person who writes malicious programs, such as malware intended to harm your computer or access your data illegally. Every day, we hear about hackers breaking into large company networks and accessing confidential information. Organizations have security in place to identify and stop anyone from accessing data on their networks, so it's important to know, when working with macros, who your trusted sources are. Word has a macro security feature that keeps track of trusted sources and locations. This macro security feature determines whether a macro is safe to run on your computer. You want reassurance that macros coming from other sources are generated by a trusted publisher. A digital signature is a code that identifies the company or person from which a file originates. Individuals can create their own digital signatures, but for them to be trustworthy, they must be issued by a trusted certificate authority. In this exercise, you learn to review the securities on your system.

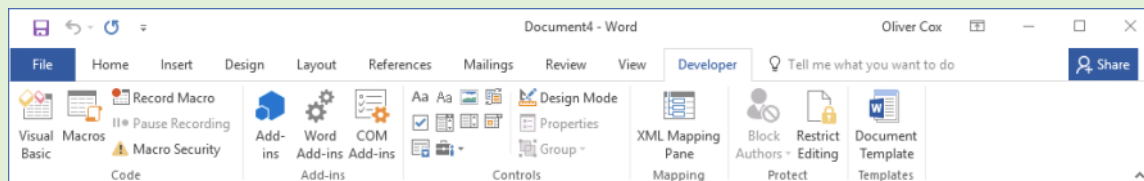


Figure 5-7
Developer tab

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

Monitoring Macro Security

Macro security in Word 2016 consists of preventive measures that determine whether a macro is safe to run.

Step by step **Review Macro Security Settings**

GET READY. CREATE a new blank document.

1. Click the **File** tab and then on the Backstage page, click **Options**. The *Word Options* dialog box appears.
2. In the *Word Options* dialog box, click **Trust Center**. The Trust Center screen appears (see Figure 5-8). On the *Trust Center* screen, Microsoft has provided links to articles on protecting your privacy, computer, and security.

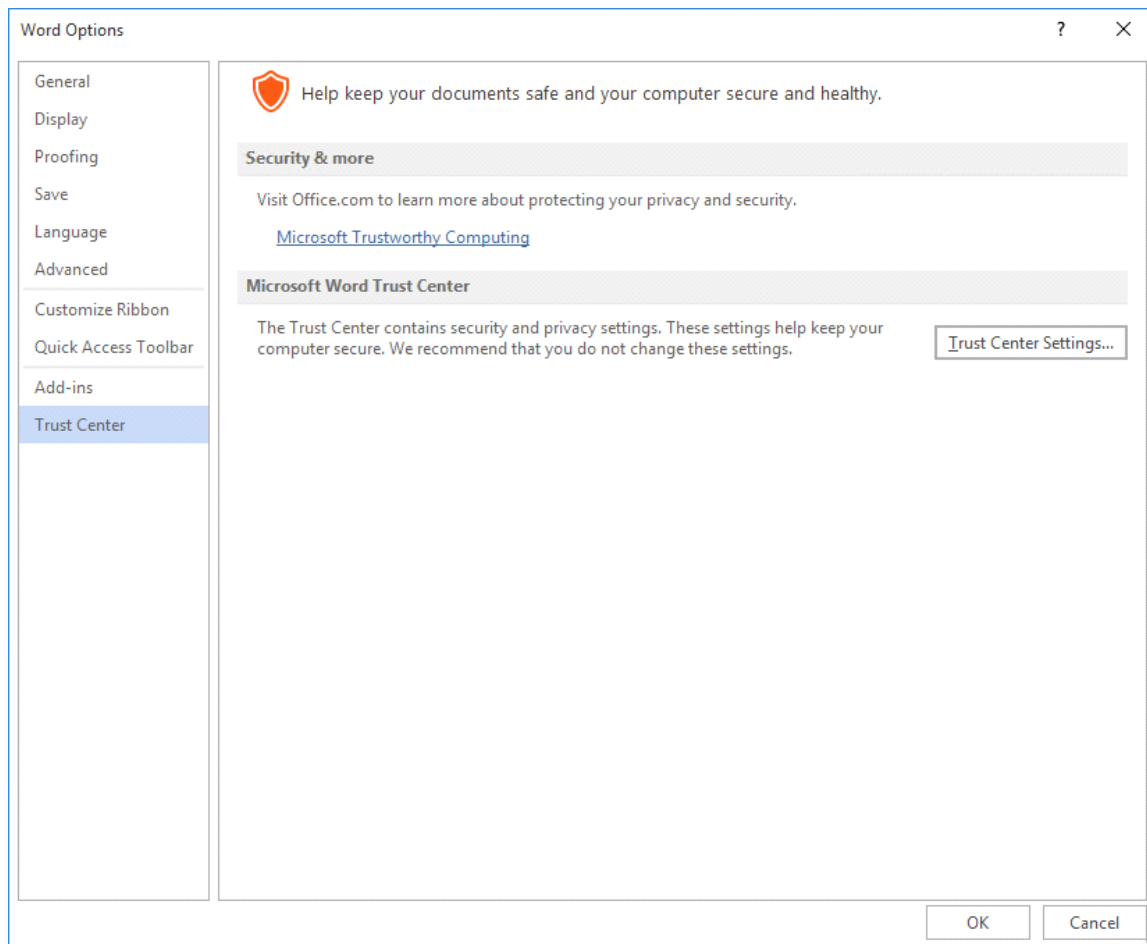


Figure 5-8
Trust Center screen

3. Click the [Trust Center Settings](#) button. The *Trust Center* dialog box appears, displaying the Macro Settings page (see Figure 5-9). This is where you manage how macros run. You can choose to disable all macros with or without notification, disable all macros with the exception of those that are digitally signed, or enable all macros, which could harm your computer.
4. Select the [Trust access to the VBA project object model](#) checkbox. This allows access to the Visual Basic for Applications object model.
5. Click the [Cancel](#) button to close the *Trust Center* dialog box.

PAUSE. LEAVE the *Word Options* dialog box open to use in the next exercise.

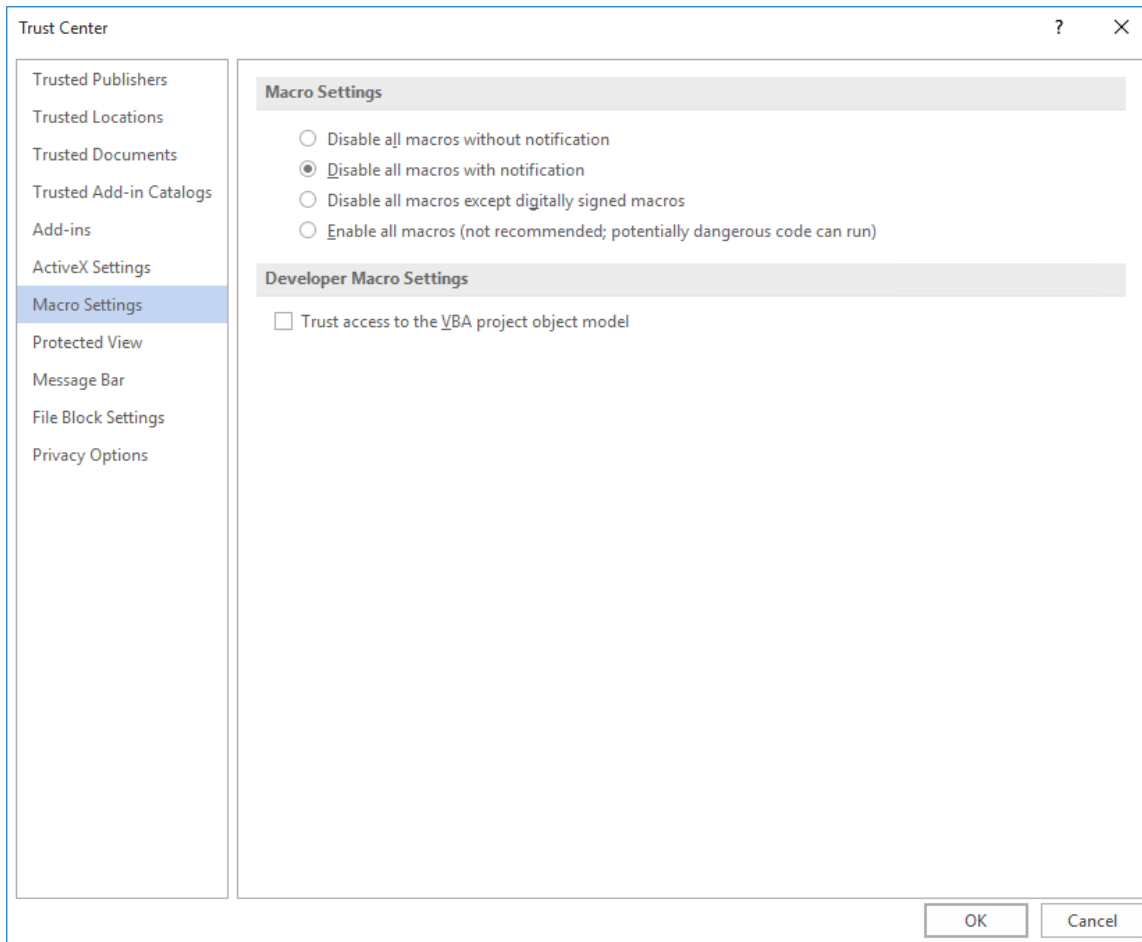


Figure 5-9
Trust Center dialog box

Now you will learn to add the Developer tab to the ribbon.

Step by step Use the Developer Tab

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

1. In the *Word Options* dialog box, click **Customize Ribbon** on the left pane. The Customize Ribbon page appears (see Figure 5-10). This screen is where you customize the Ribbon or, in this case, add a Ribbon tab that is hidden by default.
2. Under Customize the Ribbon, select the **Developer** checkbox and then click **OK**. The Developer tab appears on the ribbon.
3. Click the **Developer** tab to display its groups and commands. The Developer tab contains commands that are used with macros, which includes codes, templates, controls used in forms, add-ins, and more.

Take Note

Previously, you opened the Macros dialog box to run a macro that you created. On the Developer tab, in the Code group, you can access the Macros dialog box by clicking the Macros button. In the same group, you can record a macro and pause a recording—these are the same commands as those in the Macros group on the View tab. The Developer tab also contains more commands. The Macro Security

button opens the Trust Center. This displays the macro settings for your computer. If you have a programming background or feel comfortable writing code, you can write your own macros using the Visual Basic editor

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

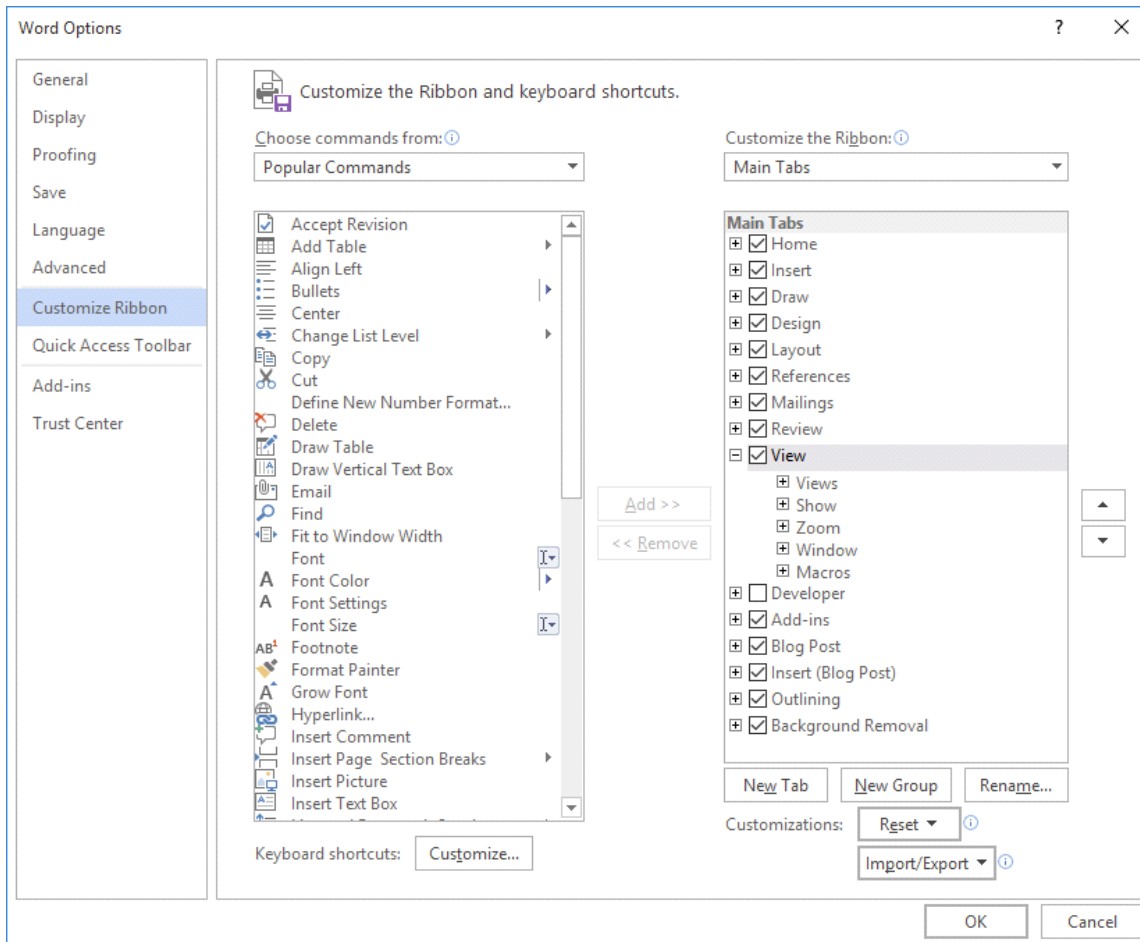


Figure 5-10
Customize Ribbon

Using Quick Parts

Quick Parts is an umbrella term for a group of Word 2016 tools that enable you to insert preconfigured content anywhere in a document. By accessing the Quick Parts gallery, you can insert any of the following types of content:

- **AutoText:** A gallery containing snippets of text that you frequently use in your documents. By default, the AutoText gallery contains the name and initials of the current Word user. You can add any selected block of text to the gallery for later insertion into a document.
- **Document Properties:** Every Word document contains property fields that specify its author and other information. Using Quick Parts, you can insert the information from any of these fields into the main body of a document.
- **Fields:** Fields are placeholders containing information that is automatically updated when you insert them into a document. For example, the date field inserts the current date, but every time you open the document, the field is updated as the date changes.
- **Building Blocks:** A gallery containing content of various types, including headers, footers, page numbers, cover pages, and watermarks, which you can add to your documents.

Using Built-In Building Blocks

Building blocks contain built-in reusable content such as text, graphics, and objects, which are easy to manage and insert in a document for a quick format. Building blocks are organized in galleries and sorted by category. In the Building Blocks gallery, you can insert cover pages, headers, footers, page numbers, text boxes, and watermarks.

Autotext is another term for one type of building block. You use both features the same way. Word provides a number of predefined building blocks, or you can create or customize your own building blocks for use in other documents. The Building Blocks Organizer tool provides a way to manage building blocks by editing, deleting, or inserting them.

In the left pane of the dialog box, the built-in building blocks are listed by name. The Gallery column indicates the gallery that contains each building block, and the Category column indicates each element's general type. The Template column indicates name of the template in which the element is stored. By storing your building blocks in the default Building Blocks.dotx template file, you make them available to all of your documents. You can use the buttons at the bottom of the dialog box to delete and edit selected building blocks. The right pane previews your selections.

In this exercise, you learn to use built-in building blocks and insert fields in a document.

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

1. On the Insert tab, in the Text group, click the **Quick Parts** button to display the Quick Parts menu, as shown in Figure 5-11.

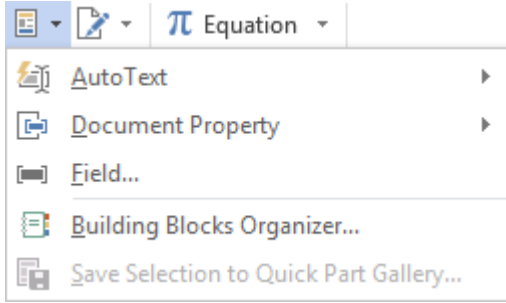


Figure 5-11
Quick Parts menu

2. Click **Building Blocks Organizer** to display the *Building Blocks Organizer* dialog box (see Figure 5-12).

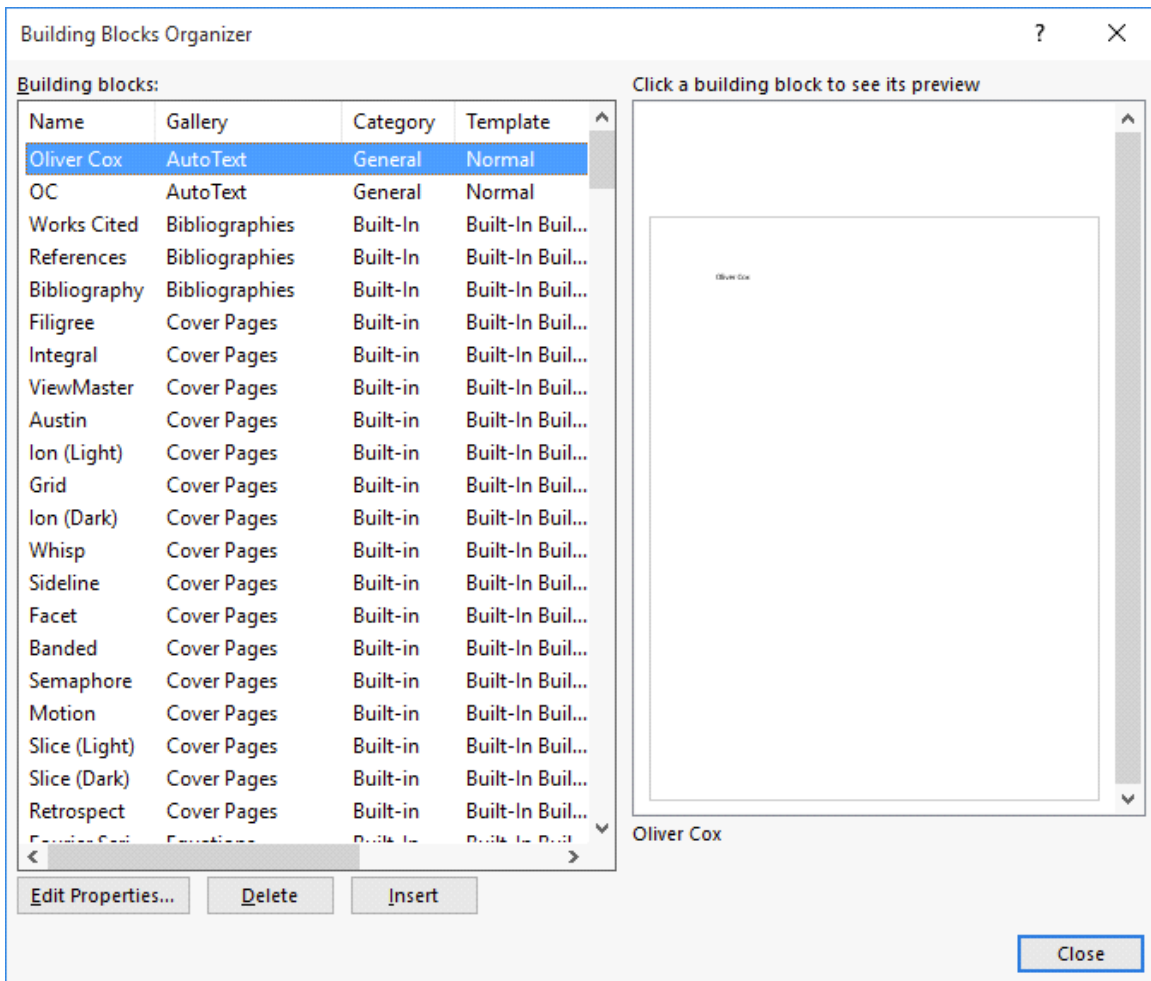


Figure 5-12
Building Blocks organizer dialog box

3. Click the **Name** heading to sort the building blocks by name.
4. Scroll down the list and then select the **Confidential 1** watermark.



Troubleshooting

You can adjust the Name column by dragging the resize bar to the right to change the width.

5. Click the **Insert** button. The dialog box closes and the Confidential watermark appears behind the text on every page of the document.
6. Position the insertion point at the beginning of the first paragraph under *Introduction*.
7. **OPEN** the *Building Blocks Organizer* dialog box again.
8. Click the **Gallery** heading to sort the building blocks by gallery.
9. Scroll down and select **Austin Quote** from the Text Boxes gallery.
10. Click **Insert**. A pull quote is inserted into the document as shown in Figure 5-13. You can type text in the placeholders or drag and drop text in the area.

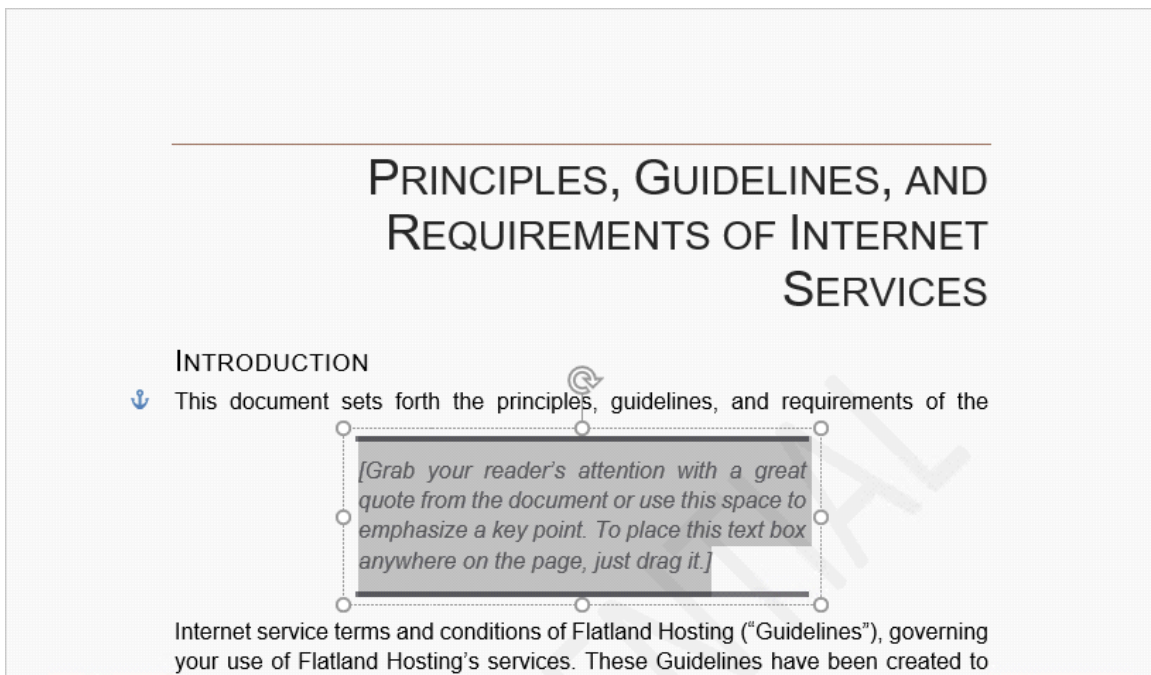


Figure 5-13

Document with Text Box Pull Quote

11. Under the heading, *Introduction*, select the second paragraph beginning with *Questions or comments . . .*
12. Move the selected text inside the quote area by dragging and dropping.
13. Click the **Show/Hide Editing Marks** button and delete both line breaks after the first paragraph under *Introduction*.
14. Select the text box and then the Layout Options button appears on the right side of the text box.
15. Click the **Layout Options** button to open the menu. The menu provides options for arranging the document text and the text box.
16. Click the **See more** link to open the *Layout* dialog box.

17. Click the **Text Wrapping** tab and then click **Square**.
18. Click the **Left only** option in the Wrap text section.
19. Click **OK**.
20. Select the text box border—the pointer changes to four arrows that enables you to drag and drop.
21. Drag the quote to the end of the first paragraph until the last seven lines of the paragraph wrap around it (see Figure 5-14).



Troubleshooting

Deselect the text box and then select it again to see the border around the

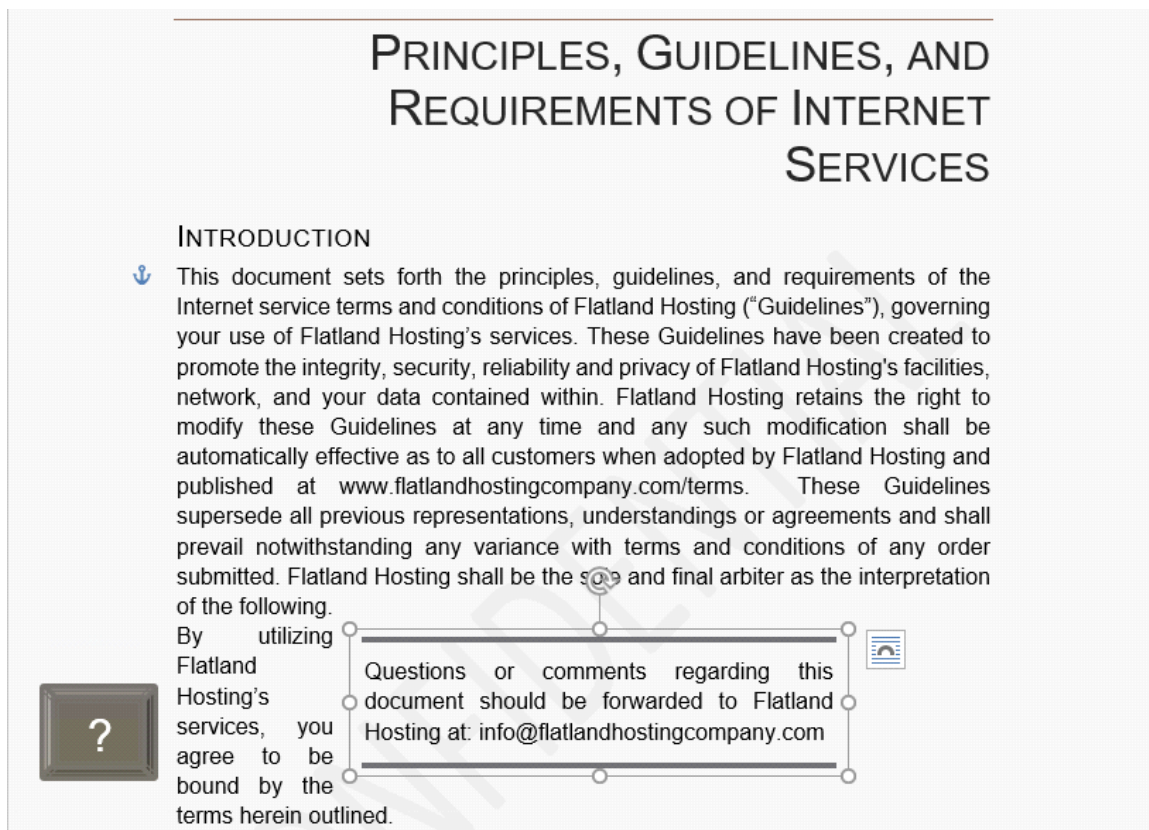


Figure 5-14

Document with Text Box Pull Quote wrapped around paragraph

22. Press **Ctrl+End** to move the insertion point to the end of the document.
23. **OPEN** the *Building Blocks Organizer* dialog box.
24. Scroll down and select **Motion Sidebar** from the Text Boxes gallery.
25. Click **Insert**. The text box is inserted at the end of the document and positioned on the left side.
26. Select the paragraph above *Refusal of Service* beginning with *You and Flatland Hosting further agree . . .* When selecting the paragraph, do not select the paragraph mark, to avoid displaying the horizontal line in the text box twice.
27. Change the font color to white so that the text will be visible on the sidebar.
28. Drag and drop the selection in the text box.
29. At the top of the text box, delete the **[Sidebar Title]** placeholder and blank line to

Creating and Copying Building Blocks

You can create your own building blocks, to store any text that you use frequently. For example, you might create a building block that consists of the signature lines you use in business letters, including your name, title, and company name.

When deciding where to store building blocks, consider whether you will want to share them with others, and whether you want them available for all documents.

New building blocks that you create in Word are stored by default in the Building Blocks.dotx file. This template is automatically enabled all the time, so no matter what document you are working on, and no matter what template it uses, the building blocks you store there will be available—that is, as long as you are working on the same computer and are signed into Windows with the same user account.

You can choose to store building blocks in the active template if you prefer. For example, if you create business letters using a template called Business Letters, and you save the building blocks in that template, those building blocks will not show up in documents created with other templates. If you share that template with others who use different computers, the building blocks will be available to them whenever they use that template.

You can share your Building Blocks.dotx file with other users on the same computer by copying it from the C:\Users\username\AppData\Roaming\Microsoft\Document Building Blocks\1033\15 folder, and then pasting it into the corresponding user folder for another user account.

You can share the Building Blocks.dotx file with users on different computers by emailing them the file or providing it on a disc or flash drive. Make sure you give the recipients instructions about where to store the file, so that Word will recognize and use it.

The following exercise shows how to create a new building block and then copy the Building Blocks.dotx file between user accounts on the same PC.

Step by step Create and Copy Building Blocks

GET READY. CREATE a new blank Word document.

1. Type the following signature block, pressing **Shift+Enter** to create line breaks between each line:
Andrew Cencini
General Manager
Flatland Hosting
2. Select all three lines in the signature block.
3. On the Insert tab, in the Text group, click **Quick Parts** and then click **Save Selection to Quick Part Gallery**. The *Create New Building Block* dialog box appears (see Figure

5-16).

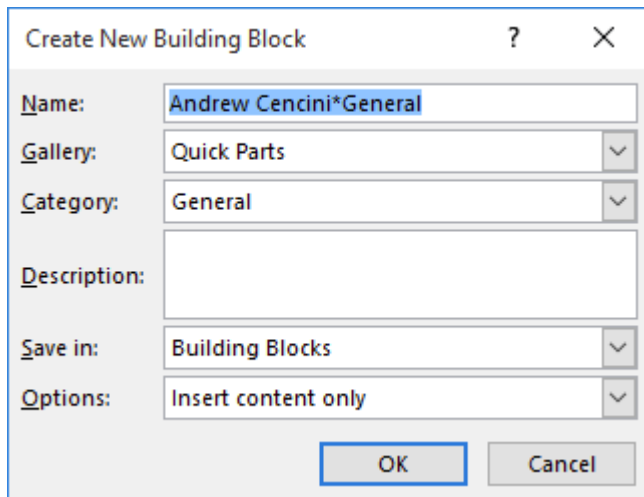


Figure 5-16
Create New Building Block dialog box

4. In the Name box, type [Cencini Signature](#).
5. Make sure that Building Blocks.dotx is selected in the Save in drop-down list.
6. Click the [Options](#) drop-down list and choose [Insert content in its own paragraph](#).

Take Note

You can edit the properties of any building block after its creation. From the Building Blocks Organizer, select the building block and then click Edit Properties. You can change the Gallery, Category, or Description of a building block and then save it in a different template. You can also choose whether to save the building block as content only or as a paragraph or page.

7. Click [OK](#).
8. [CLOSE](#) the document without saving your changes.
9. [CLOSE](#) Word. A message box appears, asking whether you want to save the changes to Building Blocks.
10. Click [Save](#).
11. In File Explorer, navigate to the C:\Users\username\AppData\Roaming\Microsoft\Document Building Blocks\1033\16 folder, where username is your user account.
12. Select the **Building Blocks** file and then press [Ctrl+C](#) to copy the file to the Clipboard.
13. Press [Ctrl+V](#) to paste a copy of the file in the same folder.
14. Rename the file **Blocks Copy**. (To rename the file, press [F2](#), type the new name, and then press [Enter](#)).

Take Note

The reason that you made a copy of the file and renamed it is so that you don't overwrite the existing Building Blocks file in the destination folder in the following steps.

15. Select **Blocks Copy** and then press **Ctrl+C** to copy the file to the Clipboard.
16. Navigate to the folder that your instructor has told you to use for this exercise. For example, your instructor may want you to paste the file into the C:\Users\username\AppData\Roaming\Microsoft\Document Building Blocks\1033\16 folder for some other user on the same PC.
17. Press **Ctrl+V** to paste the file into the new location.
18. Navigate to the lesson folder on your flash drive and then press **Ctrl+V** to paste a copy of the Blocks Copy file there.
19. (Optional) If you used another user account in step 16, log in to the user account into which you copied the file and then start Word. On the Insert tab, click **Quick Parts**. The Cencini Signature should appear on the top level of the menu, ready for use.

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

Inserting an Equation

Microsoft Word 2016 has built-in equations, which you can insert from the Quick Parts gallery or by using the Equation command. When you create a table that contains values, you can calculate your answer by inserting an equation. The same rules that you learned in Math apply when inserting equations. You can use the Equation Tools Design tab, which appears when you insert an equation into a document, to edit or construct your own equation. In this exercise, you learn to insert equations in a document.

Step by step Insert an Equation

GET READY. CREATE a new blank Word document.

1. On the Insert tab, **OPEN** the **Quick Parts** menu and then click **Building Blocks Organizer**.
2. In the *Building Blocks Organizer* dialog box, in the Equations gallery, locate and then click the **Expansion of a Sum** equation.
3. Click **Insert**. The Expansion of a Sum equation is inserted in the document.
4. Position the insertion point after the equation placeholder and then press the **Enter** key twice to place a blank line below the placeholder.
5. **OPEN** the *Building Blocks Organizer* dialog box, locate and click the **Area of Circle** equation, and then click **Insert**.
6. Position the insertion point after the equation placeholder and then press the **Enter** key twice to place a blank line below the placeholder.
7. **OPEN** the *Building Blocks Organizer* dialog box, then locate and click the **Binomial Theorem** equation.
8. Click **Insert**.
9. Click after the equation placeholder and then press the **Enter** key twice (see Figure 5-17).

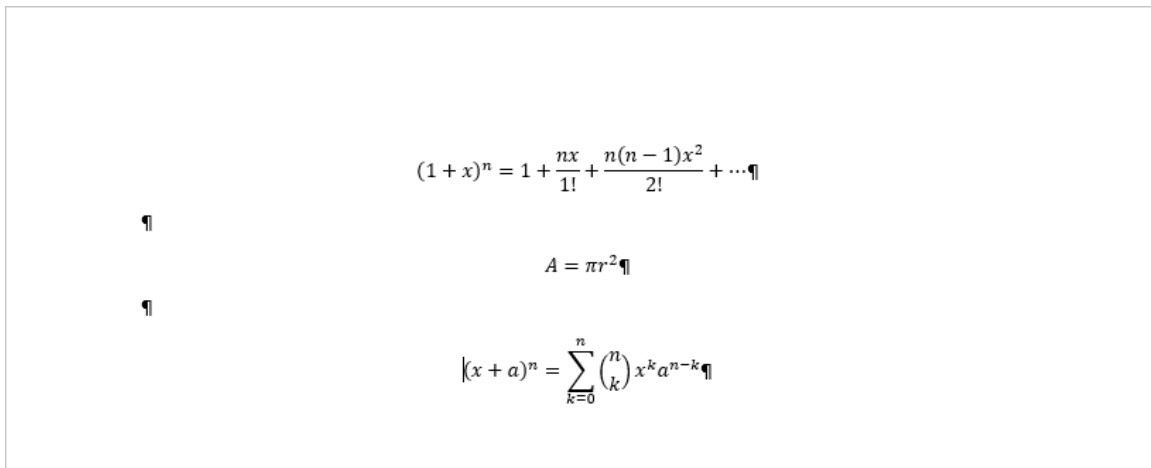


Figure 5-17
Document containing equations

10. **SAVE** the document as **Equations** in the lesson folder on your flash drive and then **CLOSE** the file.

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

Inserting a Field from Quick Parts

A field is a placeholder that Word uses to insert content into a document. Word automatically uses fields when specific commands are activated, such as those for inserting dates, formulas, page numbers, and a table of contents. For example, when you insert a date field in a document, the date is updated automatically each time the document is opened. In this exercise, you learn to insert a field in a document.

Fields, also called field codes, appear between curly brackets (**{ }**) when displayed. Field codes are turned off by default. To display the field codes in a document instead of the information the fields contain, press **Alt+F9**. You can toggle back and forth to display text and field codes by pressing **Alt+F9**. To edit a field, place the insertion point within the field, right-click, and then click **Edit Field**.

Step by step **Insert the Date and Time**

GET READY. OPEN the **Billing Table** document from the lesson folder.

1. Position the insertion point in the last cell of the table in the second column.
2. Press **Tab** to insert a new row.

Take Note

Pressing the **Tab** key advances the insertion point to the next cell. If you are in the last cell of the table, it inserts a row quickly without having to access the Ribbon.

3. Position the insertion point in the first column, fifth row. Type **Total**. On the **Table Tools - Layout** tab, in the **Alignment** group, click the **Align Center Right** button.
4. Press **Tab** to advance to the next cell.

5. On the Insert tab, in the Text group, click the **Quick Parts** button to open the menu.
6. Click **Field** on the menu. The *Field* dialog box appears (see Figure 5-18).

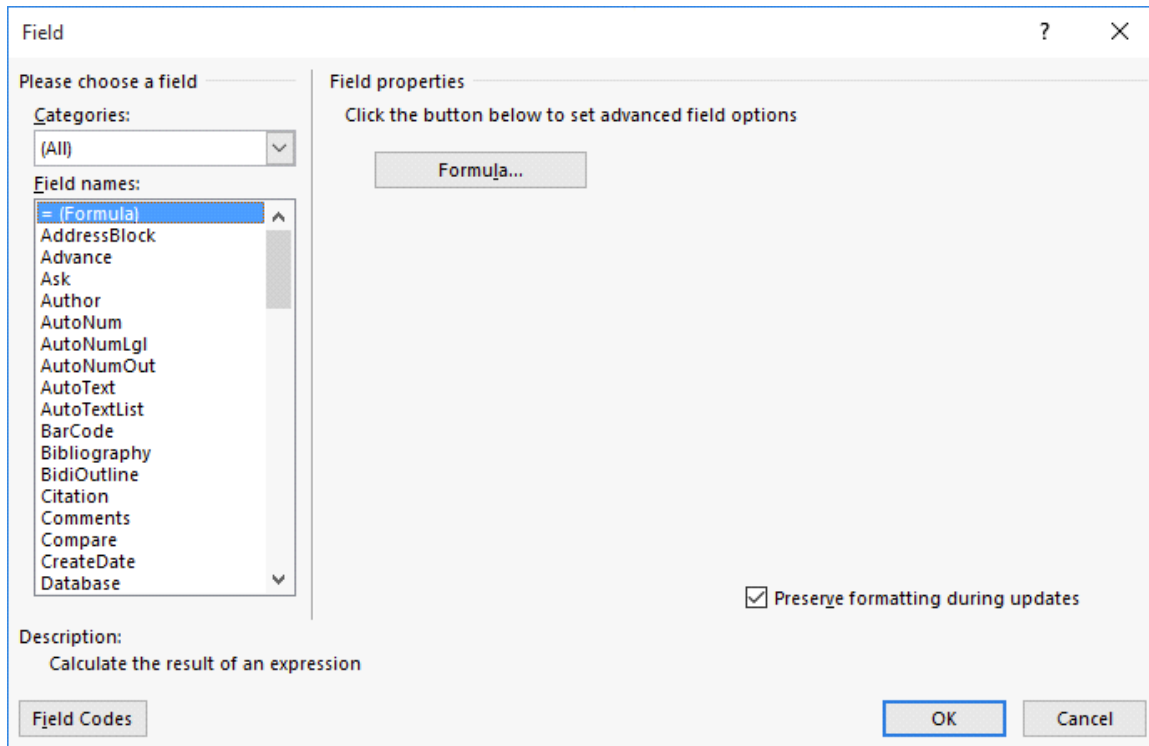


Figure 5-18
Field dialog box

7. The default = (Formula) is selected in the Field names box. Click the **Formula** button. The *Formula* dialog box appears. This is the same dialog box that is accessible from the Table Tools - Layout tab. Word automatically reads the values listed above the formula and then =SUM(ABOVE) appears in the formula box.
8. In the Number Format drop-down list, select the third option and then click **OK**.
9. Place the insertion point on the blank line below the table and then press **Enter** three times.
10. Type **Last Updated:** in bold and then press the **spacebar** once after the colon.
11. On the Insert tab, in the Text group, click the **Quick Parts** button and then click **Field** on the menu.
12. In the *Field* dialog box, in the Categories drop-down list, select **Date and Time**.



Troubleshooting

If the Field is shaded in gray, double-click the text in the cell.

13. In the Field Names list, click **Date**.
14. In the Date Formats list, select the ninth option with the Day/Month/Year format. *d MMMM yyyy* appears in the Date Formats box. These symbols represent how the date will look in your document.
15. Click **OK** to close the dialog box and insert the date field in your document.
16. The document should look similar to the one shown in Figure 5-19, with the

exception that the current date will appear.

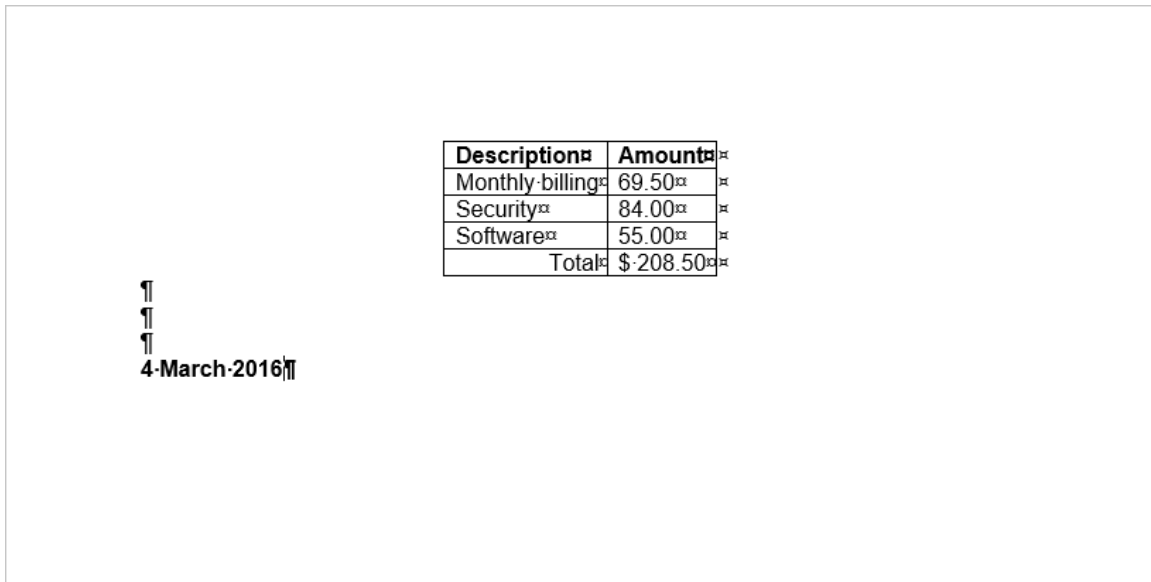


Figure 5-19

Document with Formula and Date field inserted

17. On the Home tab, in the Paragraph group, click the [Show/Hide Editing Marks](#) button to hide the marks.
18. **SAVE** the document as **Billing Update** in the lesson folder on your flash drive and then **CLOSE** the file.

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

Adding and Linking Content

In a long document, it might be useful to refer to other content in the document, such as other sections, figures, tables, or individual sentences. You can provide the item's name to refer to (for example, "see Figure 1"), but if users are going to be viewing the document onscreen, you can save them some time by creating a live link to the content to which you are referring.

If the area that you want to refer to in the link has some special status already, such as a heading or a numbered figure, equation, or table, you can use a cross-reference to refer to it. If the area is just some body text, with no special designation, you must create a bookmark to mark the spot; then you can refer to the bookmark in the cross-reference.

Creating a Bookmark

A bookmark is an invisible pointer that you insert in a document. You can insert it anywhere in a document and then refer to that bookmark in a cross-reference.

Step by step Create a Bookmark

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

1. Near the middle of page 5, select the text The mailbox size maximum is 15 megabytes.
2. On the Insert tab, in the Links group, click **Bookmark**. (You might need to click Links first, depending on the application window width.) The *Bookmark* dialog box appears.
3. In the Bookmark name text box, type **MailboxSize** as shown in Figure 5-20.

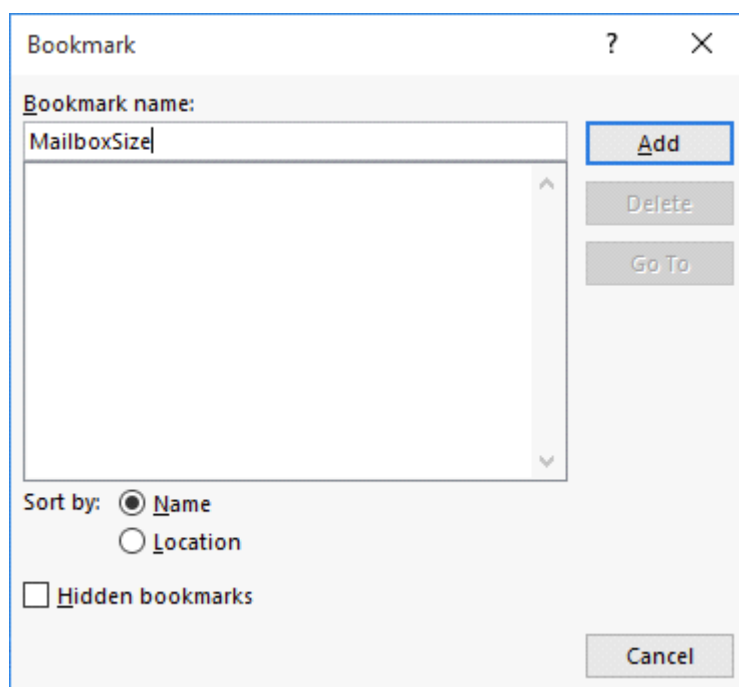


Figure 5-20

Bookmark dialog box

4. Click **Add**. The bookmark is created.
5. **SAVE** the document as **Hosting Reference** in the lesson folder on your flash drive.

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

Creating a Cross-Reference

A cross-reference is a reference to some other spot in the document. It can be a bookmark (like the one you created in the preceding exercise), or a numbered item, heading, bookmark, footnote, endnote, equation, figure, or table.

The cross-reference itself can be the actual text of the item being referenced, the page number on which it appears, the number of the referenced item (for example, 4 for the 4th paragraph), the caption of the item (such as for a figure or a table), with or without its numbering, or the word above or below.

Step by step Create a Cross-Reference

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

1. In the fifth paragraph on page 2, position the insertion point at the end of the first sentence.
2. On the References tab, in the Captions group, click **Cross-reference**. The *Cross-reference* dialog box appears.
3. Click the **Reference type** drop-down list and choose **Bookmark**. The bookmark you created earlier appears on the list, as shown in Figure 5-21.

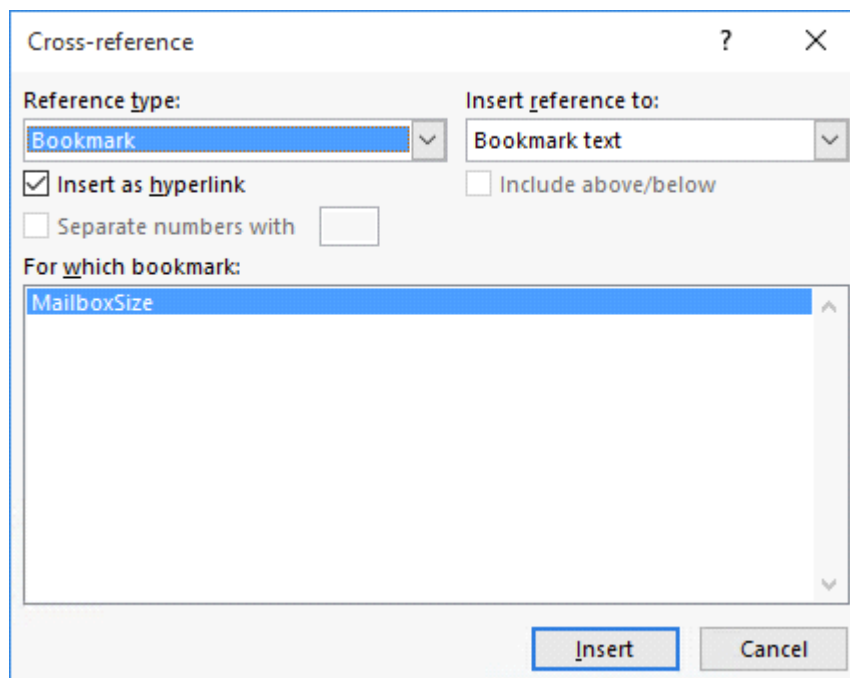


Figure 5-21

Cross-reference dialog box

4. In the Insert reference to drop-down list, leave the default Bookmark text value selected.
5. Click **Insert**. The dialog box remains open.
6. Click **Close** to close the dialog box. Note that the cross-referenced sentence appears in the paragraph. You might need to add a space to separate the sentences.
7. Scroll down to the middle of page 5 and then change 15 to **20** so that the sentence now reads: The mailbox size maximum is 20 megabytes.
8. Scroll back up to page 2, where you inserted the cross-reference. Notice that the bookmark still shows the old size.
9. Right-click the bookmark-inserted sentence and choose **Update Field**. The bookmark is updated to display the new value.
10. **SAVE** the document as **Hosting Reference 2** in the lesson folder on your flash drive and then **CLOSE** the file.

Inserting Text

Word 2016 also provides the ability to insert text from an outside file into an open document. For example, if you want to append the text from a file to the end of your open document, or insert the text in the middle of the document, you can do so using the Text from File feature.

Step by step Inserting Text from a File

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

1. Press **Ctrl+End** to move to the bottom of the document and place the insertion point after the final word: **Texas**.
2. Press **Ctrl+Enter** to insert a page break and move the insertion point to the next page.
3. On the Insert tab, in the Text group, click the **Object** drop-down list and then click **Text from File**. The Insert File combo box appears, which looks almost exactly like the standard Open combo box.
4. Locate and select the file named **References** and then click **Insert**. A new page of text appears in the document.
5. **SAVE** the document as **Resume 2** in the lesson folder on your flash drive. **CLOSE** the file.

STOP. CLOSE Word.

When you choose Object from the Object drop-down list, the Object dialog box appears, as shown in Figure 5-22. Using this dialog box, you can insert a new object or an object that you created in another application.

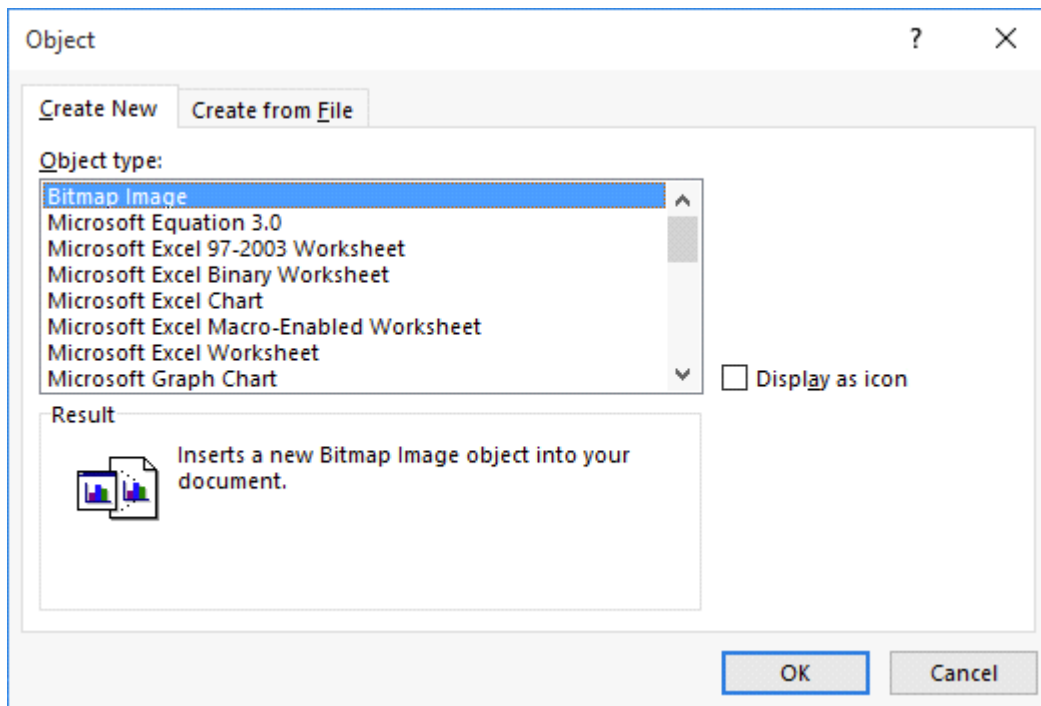


Figure 5-22
Object dialog box

For example, if you choose to insert a new Excel chart, a placeholder chart appears in the Word document and an Excel window appears, containing the same chart. Any modifications to the chart you subsequently make in the Excel window will appear in the Word document as well.

If you have an existing file you want to insert into a Word document, you can select the Create from File tab in the Object dialog box (see Figure 5-23) and browse to the file. Selecting the Link to file checkbox creates a connection to the file you select, so that any subsequent changes made to that file will automatically be reflected in the Word document.

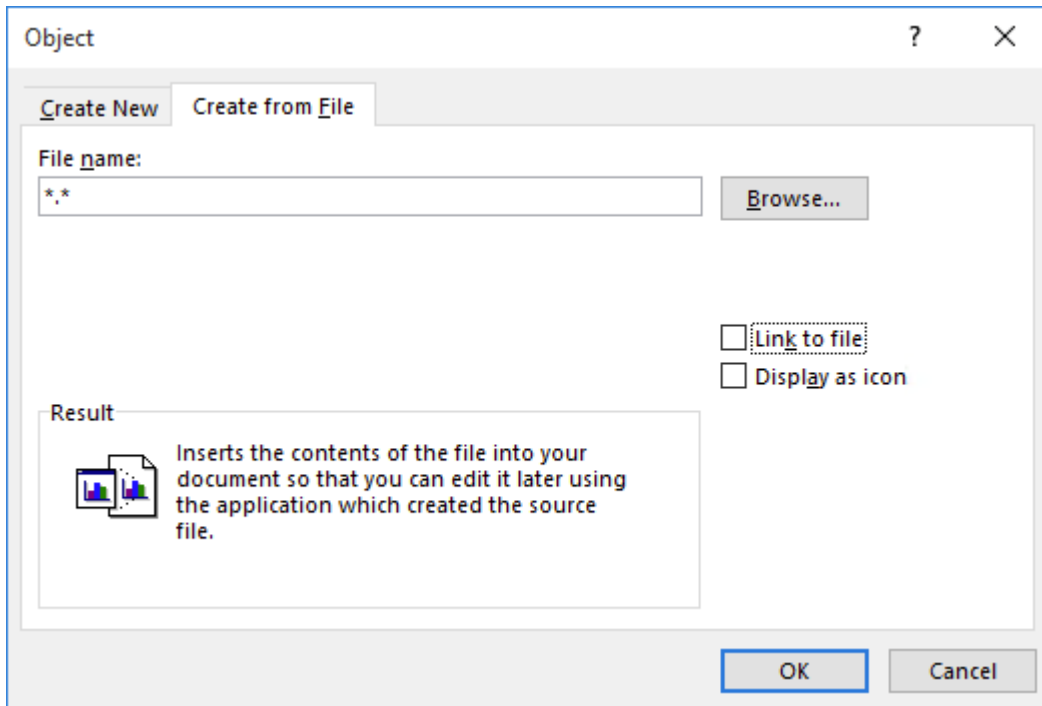


Figure 5-23
Create from File tab in the Object dialog box

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

1. Macros are used for which of the following?
 - a. boring work.
 - b. research papers.
 - c. repetitive work.
 - d. work that is not performed daily.
2. A macro that has been assigned a keyboard shortcut can be run in which of the following?
 - a. a blank document.
 - b. an existing document.
 - c. a template.
 - d. All of the above
3. Which of the following provides a way to manage building blocks by editing, deleting, and/or inserting them.
 - a. Building Blocks Organizer
 - b. Quick Organizer
 - c. Text box
 - d. Cover Page
4. Which of the following is a placeholder that tells Word to insert changeable data into a document?
 - a. data source
 - b. data field
 - c. field name
 - d. field
5. Which of the following is the term for a customized company logo applied to a page background behind a document's text?
 - a. MarkArt
 - b. Art link
 - c. Watermark
 - d. SmartArt

True/False

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

- T F 1. Macros will not automate tasks.
- T F 2. When recording a macro, you can format a document with many features to enhance the document.
- T F 3. When assigning a name to a macro, spaces can be used.
- T F 4. You can customize a building block.
- T F 5. After a text box has been inserted, the text box can be moved to another location in the document.

Projects

Project 5-1: Creating a Simple Macro

In your job at Books and Beyond, you work on documents that will be part of the employee handbook. You create a simple macro to be used for this employee handbook. In this project, you will apply skills that you have learned from previous lessons.

GET READY. LAUNCH Word if not already running.

1. **OPEN** a blank document.
2. On the View tab, click **Macros** and then click **Record Macro** in the Macros group.
3. Type the information in the appropriate box:
Macro name: **Books_and_Beyond**
Description: **Formatted report for B&B handbook.**
4. Click **Keyboard** and in the *Press new shortcut key* box, type **Alt+L**. This is an unassigned shortcut key.
5. Click **Assign**, then click **Close**.
6. In the Design tab, select the **Basic (Stylish) Style Set** from the Document Formatting group.
7. Type **BOOKS AND BEYOND**. Apply **Heading 1** from the Styles group on the Home tab.
8. Press **Enter** once.
9. Type **Second section heading**.
10. Select **Heading 2**.
11. Press **Enter** twice.
12. Type **Third section heading**.
13. Select **Heading 3**.
14. Press **Enter** twice.
15. Click **Stop Recording** from the Macros group on the View tab.

CLOSE the document without saving. **LEAVE** Word open for the next project.

Project 5-2: Creating Headers and Footers

GET READY. OPEN the **First Ladies** document from the lesson folder.

1. **SAVE** the document as **5-2 First Ladies with Building Blocks** in the lesson folder on your flash drive.
2. On the Insert tab, in the Text group, click the **Explore QuickParts** button and then select **Building Blocks Organizer**. The *Building Blocks Organizer* dialog box appears.
3. Scroll down in the Building Blocks list and then select **Whisp** in the Headers gallery.
4. Click **Insert**. The header appears, containing the author's name and the title of the document.
5. Click the **Date** field down-arrow and then click the **Today** button.

6. Double-click the main body of the document.
7. **OPEN** the *Building Blocks Organizer* dialog box again.
8. Scroll down in the Building Blocks list and then select **Whisp** in the Footers gallery.
9. Click **Insert**. The footer appears, containing the page number.
10. Double-click the main body of the document.
11. **SAVE** the document in the lesson folder on your flash drive, then **CLOSE** the file.

CLOSE Word.