Training for ECDL

Advanced Word Processing

A Practical Course in Windows XP and Office 2007

Revised by Lorna Bointon

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Note to Reader

The Manual

Advanced Word Processing for Microsoft Office 2007 for ECDL offers a practical, step-by-step guide for those who wish to upgrade their Word Processing skills to acquire a thorough competence in this application. Similar to the other Blackrock Education Centre training materials, it has been designed as either a stand-alone study guide or for use in a tutor-led environment. However, as is characteristic of Blackrock Education Centre training materials, the content of this manual offers additional support information through explanations, demonstrations and practical exercises as well as a support website, www.becpublishing.com.

Design

Every use has been made of the expertise we have gained training students in ICT over many years. The knowledge and skills of our substantial pool of trainers hugely influenced the content and layout of the material.

- The manual is written in plain English.
- There are step-by-step, detailed explanations and action sequences.
- Particular attention is given to relating what is seen on the pages of the manual to what is seen on the computer screen.
- The A4 size of the manual and the side-by-side layout of graphics and text, combine to make it an ideal training manual.

Exercises

At the end of each section, there are two kinds of exercises. There are self-check questions designed to jog your memory of important details. There are also practical exercises that have been designed to revise some of the more important skills associated with using Microsoft Word.

In successfully completing each set of exercises, the student can be confident, that progress in learning more sophisticated skills has been achieved.

Web Support

Support material is available at www.becpublishing.com.

This manual was produced – text, design and layout – using only the Microsoft Office suite of programs and the skills described in the manual. The screen shots were captured using a small utility program and most were inserted directly onto the page.



Prac	tice Sequence	
1	Open the document called Text_wrap_table .	
2	Apply text wrap to the table so that it wraps to the right of the text. Ensure that the positioning is set so that the distance from the surrounding text is 0.5cm from the left and right. <i>If you need help</i> :	
	Select the table and then click the Table Tools/Layout tab. Select the Properties button in the Table group. Select the Table tab and the select the Around text wrapping option. Select the Positioning button and then change the Left and Right measurements for the distance from surrounding text to 0.5 cm. Click OK twice to return to the document.	
3	Save the document and close it.	
4	Open the document called text_wrap_chart.	
5	Apply text wrap to the chart so that it wraps tightly to the left of the text. Ensure that the positioning is set so that the distance from the surrounding text 1cm from the top and bottom. <i>If you need help</i> :	
	Select the chart and then click the Chart Tools/Format tab. Select the Text Wrapping button in the Arrange group. Select More Layout Options. Select the Text Wrapping tab. Select the Square wrapping style and the Left Only wrap text option. In the Distance from text section, set the Left setting to 1 cm and the same for the Right setting. Click the Picture Position tab and in the Vertical section, set the Absolute position to 1.5cm below the Paragraph. Click OK to return to the document.	
6	Save the document and close it.	
7	Open the document called text_wrap_drawn_object.	
8	Select the star shape and then right mouse click and choose Format AutoShape . Click the Layout tab. Select the Tight wrapping style and then Left horizontal alignment. Click OK to return to the document. If you wish, you can drag the shape with the mouse to slightly adjust its position on the left side of the page	
9	Access the Advanced Layout window for the selected shape. Click the Text Wrapping tab. In the Distance from text section, set the Left setting to 0.5cm and the same for the Right setting. Click the Picture Position tab and in the Vertical section, set the Absolute position to 3cm below the Paragraph . Click OK to return to the document.	
10	Save the document and close it.	

1.2 Find and Replace Options for Formatting (3.1.1.2)

This section draws on existing knowledge in using the Find and Replace feature to find text in a document and replace it with alternative text. It also advances knowledge of this feature further by searching for items based on font and paragraph formats, paragraph marks and page breaks.

1.2.1 Font Formats

Font formats refer to font types, font styles (including underline styles), font colours, font effects and font sizes.

To find and replace text based on font formats do the following:



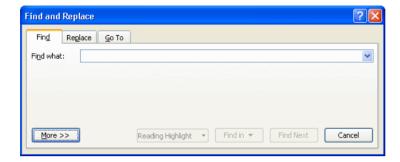




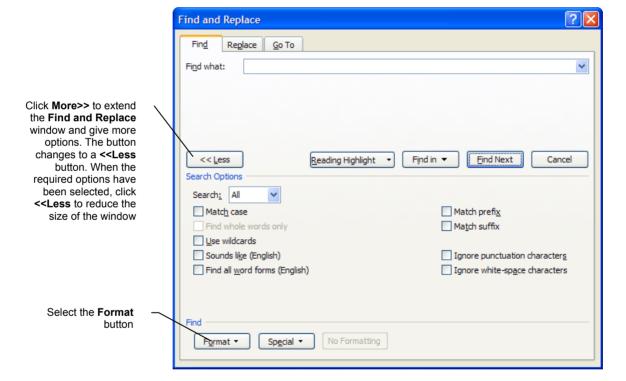


Find

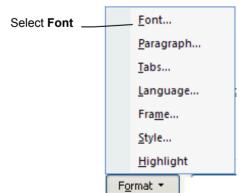
- Select the Editing group from the Home tab.
- Select Find.
- The Find and Replace window opens.
- Ensure that the Find tab is selected.



- To find specific text, enter the text into the **Find What** box otherwise leave this blank.
- Click More>> to see further options in the Find and Replace window.



Select the **Format** button. A pop-up menu appears.



Select the Font menu option.
 The Font window opens.





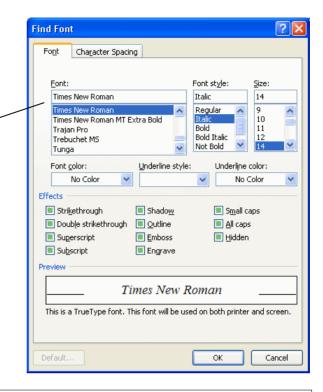


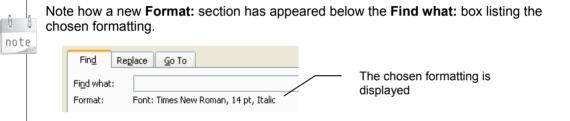
Unauthorised Photocopying is Unlawful



- In the Font tab, select the required font, font, style, font size, font colour, underline style and font effects.
- Click OK.

Select a font, font style, font size, font colour, underline style and/or font effects from this window

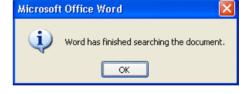




 Select the Find Next button to find the first instance of text with this formatting in the current document.



- Select Find Next until all instances have been found.
 A message will appear stating that Word has
 - finished searching the document.
- Click OK.
- Click Close.



Replace

From the Home tab and the Editing group, select the Replace button
 The Find and Replace window opens.



- Click More>> (if already selected, the <<Less button will be displayed).
- If an existing format is displayed, select the No Formatting button at the bottom of the window.

 \bigcirc



Select the **No Formatting** button to remove existing formatting

- Click the mouse in the Find What box.
- Select the Format button.
- Click Font.
- Choose the font, size, colour, style, etc. that you want to replace.



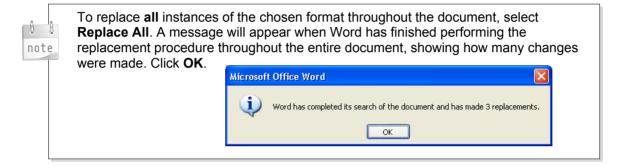




- Click OK.
- Click in the Replace With box and then select the Format button.
- From the Font window choose the font, size, style, colour, etc. that you want to replace the existing format.
- Click OK.
- To replace the chosen format with the new format, step by step, select the Replace button between each replacement.

A message will open when Word has finished searching the entire document.

- Click OK.
- Select the Close button to exit the Find and Replace window.

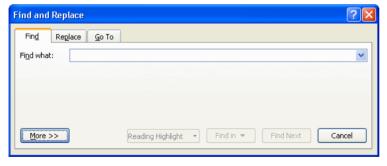


1.2.2 Paragraph Formats

Paragraph formats refer to alignment, indentation, and paragraph and line spacing.

To find and replace text based on paragraph formats do the following:

- Select the **Home** tab and then, from the **Editing** group, select the **Find** button. The Find and Replace window opens.
- Ensure that the **Find** tab is selected.



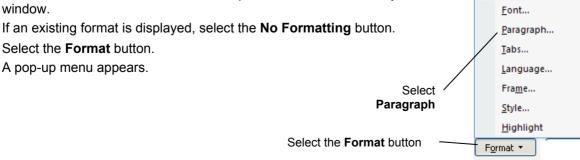
To find specific text, enter the text into the **Find What:** box otherwise leave blank.

For more advanced text wrapping and positioning options, do the following:

Click the More>> button to see further options in the Find and Replace window.

Select the Format button.

A pop-up menu appears.











Section 6 ➤ Cross-References

Cross-references can be used to point the reader to another subject within the document. You can refer to such elements as headings, footnotes and endnotes, bookmarks, captions, numbered items, tables and figures.

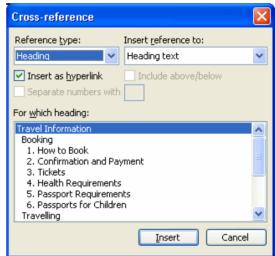
6.1 Creating Cross-References (3.2.3.2)

Cross-references can only be created within the current document. If you need to make references across multiple documents, you need to combine all of the documents into a master document.

To create a cross-reference to an index entry, see Section 4 Working with Indexes and 4.2.3 Create a Cross-reference to an Index Entry.

To create a cross-reference, do the following:

- Click where the cross-referenced information is to appear.
- From the References tab and the Captions group select Cross-Reference.
 - The **Cross-reference** window opens.
- From the Reference type: box make an appropriate selection. See Section 6.1.1 for a list of options.
- Make a choice from the Insert reference to: box. See Section 6.1.2.
- Select which item you wish to reference from the For which heading: box.
- Tick Insert as hyperlink if you are saving your document as a web page and want to make the references into hyperlinks so that visitors to the page can simply click the hyperlink to access its reference.
- Check the Include above/below box if appropriate. See Section 6.1.3.
- Click Insert to create the cross-reference.



6.1.1 Reference Types

Numbered Item	Lists all the text entries beginning with a number throughout the document.
Heading	Shows all headings based on the styles Heading 1, Heading 2, etc. or outline levels.
Bookmark	Displays all the bookmarks currently available within the document.
Footnote	Shows all footnotes inserted in the document.
Endnote	Lists all endnotes that have been created.
Equation	Shows any equations that have been inserted into the document.
Figure	Lists all figure references.
Table	Shows all available tables within the document.









6.1.2 Insert Reference to Options

The **Reference type:** box will change depending on which reference type you have selected. Typically, this box enables you to choose what type of reference you want. For example, you may want to display a reference's page number, or paragraph number, or the heading reference itself.

There are two special types of reference that can be inserted that may be confusing: **Paragraph (no context)** and **Paragraph (full context)**. Imagine that you want to reference a paragraph that is numbered **1. a) ii**. If you selected to insert the reference using **Paragraph (no context)** the reference for that paragraph would be **ii**. If you used **Paragraph (full context)**, the reference for that paragraph would be **1. a) ii**.

6.1.3 Include Above/Below

The **Include Above/Below** option is used to create a **relative reference** to a particular item. This helps readers locate the reference more quickly by letting them know in which direction (up or down the page) the reference text can be found

Imagine that you are referencing the page number of a particular heading. By ticking the **Include Above/Below** option, if the referenced text appears on the same page as the reference, Word will automatically insert the word **Above** or **Below** based on the position of the reference.

6.2 Deleting Cross-References (3.2.3.2)

Cross-references are actually special field codes that are embedded into your document. When you move the cursor over a cross-reference location, the reference usually displays with a grey background.

To delete a cross-reference, do the following:

- Highlight the cross-reference that appears in the document (remember that cross-references display with a grey background).
- Press Delete.



If you find it difficult to highlight some of your cross-references, you may find it easier to display the entire code and then make the deletion. To turn on the display of field codes within a document, press **ALT+F9**.

6.3 Updating Cross-References

If you wish to move a cross-reference, you can simply select it and cut and paste it into a new location. As your document changes, you may also find that your cross-references need updating. For example, the number of pages in your document may change and any cross-references displaying page numbers will need to be updated.

To update cross-references, do the following:

Single Cross-Reference

- Highlight the cross-reference.
- Press F9 to update the field.

All Cross-References

- Select the entire document (use the mouse or CTRL+A to highlight the whole document).
- Press F9.



You can request that all field codes (include cross-references) are automatically updated when you print. This can be a great safety guard if you forget to update an entire document before printing. Choose **Print** from the **File** menu. From the Print window click the **Options** button. Tick the **Update Fields** box and click **OK**.







Section 3 ► Mail Merge

Mail merge is used to join or **merge** two sources of information into a single document. Its most common uses are for producing form letters and mailing labels.

A form letter is a letter with standard information that is sent to many people but where each letter must have some individual information, such as the person's name, company, address, etc.

The source of this individual information is known as the **data file** or **data source**. A data file contains individual details for each person that you want to send a letter to. These individual details are known as **records**. The records in a data file are merged with a form letter to produce personalised letters.



A data source file may be in database format, if created through the Mail Merge process, or in word processed table format, if the data has been entered directly into a table and then saved as a Word document. The process of editing a data source is slightly different depending on the format of the data source.

3.1 Using the Mail Merge Task Pane (3.3.3.1)

One of the easiest ways to work with the mail merge process is by using the Mail Merge Task Pane. The task pane steps you through the necessary tasks needed to create or edit form letters, data files and mailing labels.

To start the Mail Merge Task Pane, do the following:

- Select the Mailings tab.
- Select the Start Mail Merge arrow.
- Choose Step by Step Mail Merge Wizard... from the menu.
 The Mail Merge task pane opens.
- Use the available options to perform the various mail merge steps, clicking Next to continue to the next step in the Mail Merge process.



3.1.1 Creating a New Data Source

There are two methods available to create a new data source; as a data file saved as a database, created through the Mail Merge Wizard, or as a Word table. Both methods are shown below.



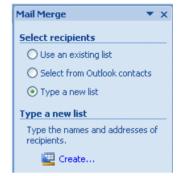


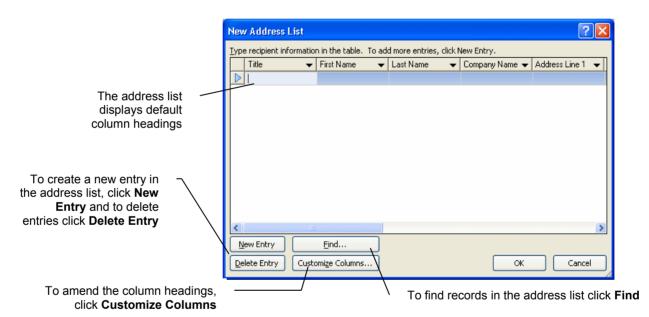




Using Mail Merge Wizard

- In Word, create a new document or open an existing document and select the Mailings tab.
- Select the Start Mail Merge arrow.
- Choose Step by Step Mail Merge Wizard... from the menu.
 The Mail Merge task pane appears.
- Ensure that the Letters option button is selected and click Next: Starting Document.
- Click the option button relevant to your document: if using the existing document select the Use
 the Current Document option button; if you are starting the mail merge procedure from an
 existing mail merge document, select Start from Existing Document and choose the document
 from the list and click Open.
- Click Next: Select Recipients.
- Select the Type a New List option button.
- Select Create...
- The **New Address List** window opens displaying default column headings (called field names):





 Select the Customize Columns button to add or delete the existing columns in the address list.

The **Customize Address List** window opens.

To delete a field name, do the following:

- Select the field name.
- Click Delete.
- Click Yes to confirm the deletion.









To add a field name, do the following:

Select the Add button.

The Add Field window opens.

- Enter the field name.
- Click OK.

Enter the field name

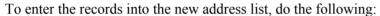


To move the new field name into position, do the following:

- Select the field name.
- Select the Move Up or Move Down buttons.

To rename an existing field, do the following:

- Select the field name.
- Select the Rename button.
- Enter the new name into the **To** box.
- Click OK



- Press the **Tab** key between each field.
- Select the New Entry button to begin entering a new record.
- When the address list is complete, select OK.
- Save the address list with a relevant name (it will save in database format in the My Data Sources folder unless you specify a different location).
- Click Save.
- The Mail Merge Recipients list opens.
- Click OK.

Using a Word Table

- Create a new document and, from the Insert tab and the Tables group, select the Table arrow.
- Select Insert Table.
- Enter the number of columns and rows required for the address list.
- Click OK.
- Enter the field names in the first row of the table.
- Enter the records into the table, using the Tab key to move the cursor between fields (use Shift + Tab to return the cursor to the previous field). Ensure that the fields are entered under the correct field names.
- From the Microsoft Office Button, select Save As.

The Save As window opens.

- Select the correct drive and/or folder from the **Save In** drop-down box where the file is to be saved.
- Enter a filename for the data source.
- Click Save.

3.1.2 Using an Existing Data Source

If a data source already exists, it can be attached to a form letter to create a mail merge document. A data source can be saved as a Word table or a database data file. Whichever format the data source is saved in, both can be opened through the Mail Merge Wizard.

To use an existing data source, do the following:

- Open the data source and select the Mailings tab.
- Select the Start Mail Merge arrow.











- Choose Step by Step Mail Merge Wizard... from the menu.
 - The Mail Merge task pane opens.
- Ensure that the Letters option button is selected and click Next: Starting Document.
- Click the option button relevant to your document.
 If using the existing document select the Use the Current
 Document option button; if you are starting the mail merge procedure from an existing mail merge document, select Start from Existing Document and choose the document from the list.
- Click Open.
- Click Next: Select Recipients.
- Select the Use an Existing List option button.
- Click the Browse button.
- · Select the data source file.
- Click Open.
- The Mail Merge Recipients window opens.
- Click **OK** to exit the window and return to your document.

To continue the mail merge procedure, select Step 4 of 6 Write your Letter.

3.1.3 Inserting Merge Fields

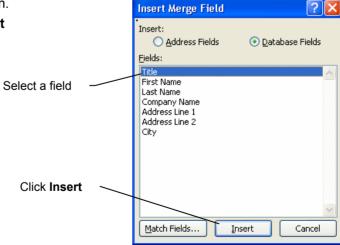
Merge fields are the fields that are selected and used when creating a new address list.

To add the address list fields to the document, do the following:

- Ensure that the cursor is in the correct position within the document.
- At Step 4 of 6 Write your Letter, select More Items.
 The Insert Merge Field window opens.



- Select the Database Fields option button.
- Select a field from the list and click Insert
- Select Close.



- Press the spacebar or the Enter key to create a space and reselect More Items.
- Repeat the above procedure until all the merge fields are inserted into the correct positions within the document.







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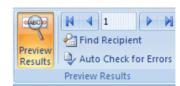


 Repeat the above procedure until all the merge fields are inserted into the correct positions within the document.

Merge fields appear as field headings as shown on the right.

 $\begin{array}{l} \text{Merge Fields} \\ \text{examples} \end{array} \quad \begin{array}{l} \text{«Name»} \\ \text{«Address_l»} \\ \text{«City»} \end{array}$

- To see the merge fields as records instead of as field headings, select the Preview Results button.
- Use the navigation arrows to view the next record(s) or previous record(s).



3.1.4 Merging Data

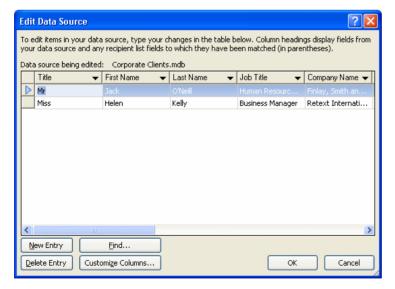
The data source and the document are now ready to be merged into one document.

To complete the mail merge procedure, do the following:

Select Next: Preview Your Letters.

This task pane enables the user to either preview the letters or make changes.

- Use the arrows to view each recipient within the document to check that they have been entered correctly.
- Select Exclude this Recipient to exclude the currently displayed recipient from the mail merge procedure.
- Select Edit Recipient List to make changes to the address list.
- In the **Data Source** section of the window, select the data source.
- Click Edit.
- The Edit Data Source window opens.
 - ▶ Edit the records by clicking into the relevant field(s) and making changes.
 - Create a new record by selecting the New Entry button.
 - ▶ Delete an entry by selecting the record and then clicking **Delete Entry**.
- Confirm the amendments/update and/or deletions by selecting the **Yes** button.



- Click **OK** twice to return to the task pane.
- Select Next: Complete the Merge.

At the next step, there are two choices: print the merged letters without merging the data source and the letter or complete the merge.









5.2.2 Apply As You Type Options

Built-In Heading Styles

If this option is checked, built-in headings styles are automatically applied to your text, depending on certain circumstances: the heading must be fewer than six words and must not end with any punctuation. You must also have pressed Enter twice before the heading text (i.e. at the end of the previous paragraph).

For Heading 1, type a new line of heading text. For Heading 2, precede the new line of text with a single tab. For Heading 3, precede the new line with two tabs. Each time you include an extra tab space before the heading text, the heading style is taken to the next level, such as Heading 4, Heading 5, down to Heading 9.

For example

Having pressed the **Enter** key twice, type a line of text that has few than five words Do not include a full stop

Press the Enter key twice

The text is formatted using the Heading 1 style

Having pressed the **Enter** key twice, press the **Tab** key Type a line of text that has few than five words Do not include a full stop

Press the **Enter** key twice

The text is formatted using the **Heading 2** style

Border Lines

If you check the **Border Lines** option in the **Apply As You Type** section, borders can be added above or below a paragraph by typing three or more of the special characters listed below.

If you: Type three or more hyphens (-) or underscores (_) and then press **Enter**, a single line

border will be inserted by the AutoFormat feature.

If you: Type three or more equal signs (=) and then press **Enter**, a double line border will be

inserted by the AutoFormat feature.

If you: Type three or more asterisks (*) and then press **Enter**, a dotted line border will be

inserted by the AutoFormat feature.

If you: Type three or more tildes (~) and then press **Enter**, the AutoFormat feature will insert

a wavy line border.

If you: Type three or more hashes (#) and then press **Enter**, the AutoFormat feature will

insert a decorative line border.









Tables

If you check the **Tables** option in the **Apply As You Type** section, you can create tables by using the plus sign (+) to indicate a column border and hyphens (-) or underscores (_) to indicate the column width. Then press **Enter** to create the table.

+_	+	+	++	+

Automatic Bulleted Lists

If you check the **Automatic bulleted lists** option in the **Apply As You Type** section, Word will automatically format a list for you with the bullet symbol you use for the first line of the list. Each time you press the **Enter** key, Word provides you with another bullet symbol for the next item. When you press **Enter** twice, Word considers that you have finished the list and the bullet is deleted from that line.

Automatic Numbered Lists

If you check the **Automatic numbered lists** option in the **Apply As You Type** section, Word will automatically format a list for you with a numbering system based on the number or letter you use for the first line of the list. Each time you press the **Enter** key, Word provides you with another number/letter in the sequence for the next item. When you press **Enter** twice, Word considers that you have finished the list and deletes the number from that line.

Prac	ctice Sequence	
1	Ensure you are working in a new blank document.	
2	Access the AutoCorrect window by selecting Word Options from the Microsoft Office Button. From the Proofing tab, click the AutoCorrect Options button. Click the AutoFormat As You Type tab and set the Apply As You Type options as shown below.	
	Apply as you type Automatic bulleted lists Automatic numbered lists Border lines Built-in Heading styles	
3	Click OK to accept the changes and then click OK to return to the document.	
4	Type three tildes (~~~) on a blank line and then press Enter . A wavy line should appear. Now type three asterisks (***) on a blank line and press Enter . A dotted line should appear.	
5	On a blank line, type the following example and then press Enter . ++	
6	On a blank line type the sequence a) then press the Tab key. Type Cats and then press Enter . On the next line type Dogs and press Enter . On the last line type Ponies and this time press Enter twice to end the numbered list.	
7	Close the document without saving it.	

5.2.3 Replace As You Type Options

The **Replace as you type** options can be used to control the automatic replacement of specific text. This is activated by pressing the **space bar** after the text has been typed.







Prac	ctice Sequence	
1	Open the document entitled Edited Draft Travel Information.	
2	Imagine that this document has been sent to you by a colleague within your organisation for your review. You will review the suggested changes and decide whether to accept or reject them.	
3	Ensure you are working at the top of the document. Click the Track Changes button. Click the Next button to locate the first change. From the Accept drop-down menu, click the Accept and Move to Next option to confirm the deletion of the word ensure and then Accept and Move to Next again to confirm the insertion of the word guarantee . Now review the remainder of the changes making your own decision as to what is accepted or rejected.	
4	Save the document and close it.	

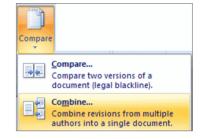
1.7 Comparing and Merging Documents (3.4.1.4)

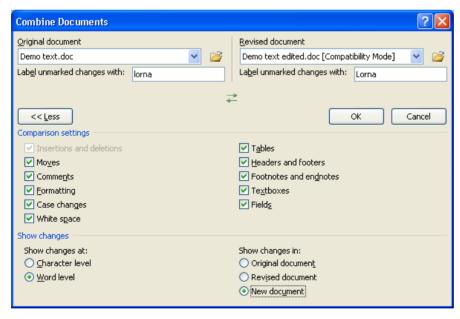
Revisions made by more than one author on the same document can be compared and combined (merged) into one document.

To compare/merge documents, do the following:

- In the Compare group of the Review tab, select the Compare arrow.
- Click Compare to compare two versions of a document or Combine to combine revisions from multiple authors into a single document.

The **Compare** or **Combine** window opens, depending on the chosen option.





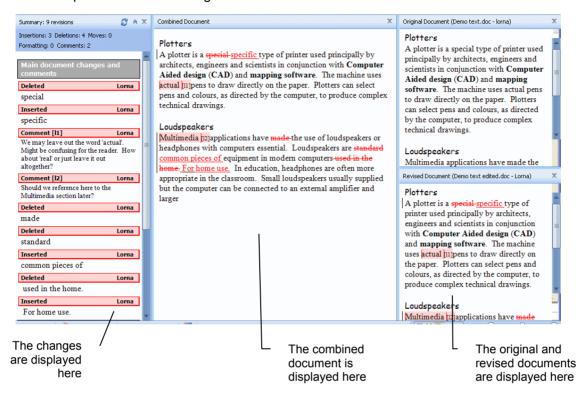
- Select the Original document from the drop-down list.
- Click the Browse folder to locate the file if necessary.
- Enter a label with which to display unmarked changes (or retain the default label that is displayed).
- Locate the **Revised document** and enter a label with which to display marked changes (or retain the default label that is displayed).
- Select or deselect the Comparison settings check boxes as required.
- Select the Word Level option button in the Show changes at: section.



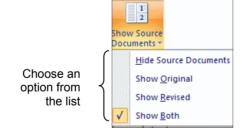


- Choose an option from the Show changes in: section (if you click New Document the changes will be combined in a new document).
- Click **OK** to return to the document.

The example below shows changes combined in a new document.



 For more display options, click the Show Source Documents arrow and choose an option from the menu.



Accept or reject changes as required and save the document.

Pra	ctice Sequence	
1	Open the document entitled Edited Draft Travel Information.	
2	Compare the original document Draft Travel Information with the edited version. Ensure that all of the Comparison settings are selected. Select Word Level and New Document .	
3	Merge/combine the two documents into one document.	
4	Save the merged document as Combined Draft Travel Information and close all open documents.	





Section 2 ▶ Document Setup

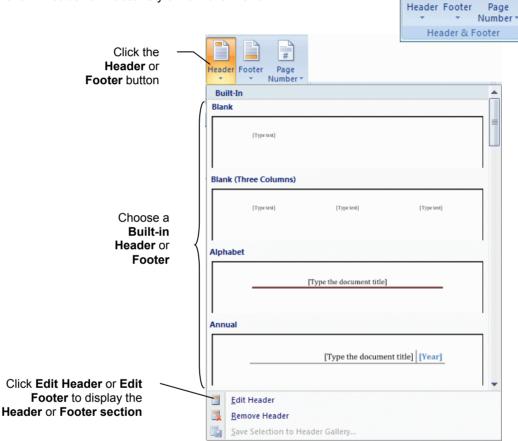
2.1 Headers and Footers (3.5.2.1)

Headers and footers apply to the top and bottom sections of a page in a document. If there is only one section in a document, then the header and footer will appear on every page. However, if the document is separated into more than one section, different headers and footers can be created for each of the sections independently.

2.1.1 Inserting a Header of Footer

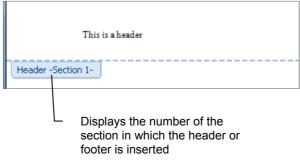
To insert a header or footer, do the following:

- On the Insert tab/Header & Footer group, select either Header or Footer .
- Select a Built-in Header or Footer style from the menu.



Alternatively, click **Edit header** or **Edit Footer** to see the **Header** or **Footer** section and begin inserting header/footer information.

The **Header** or **Footer** boxes display the section number for the section you are currently working in.











You can use the **Show Next** and **Show Previous** buttons on the **Header & Footer Tools** ribbon to move between the different sections of your document.

Displays **Same as Previous** if the header/footer is linked to the previous one



The **Link to Previous** button can be used to turn off the link between the current header or footer and the preceding one





The header and footer boxes from section 2 onwards are automatically linked to each previous section's header or footer. This can be useful, if either the header or footer needs to be consistent throughout the entire document. If not, you need to use the **Link to Previous** button to turn the link off.



You can print specific sections of your document rather than just selected pages or the entire document. Select **Print** in the **Microsoft Office Button** menu and then select the **Pages** option. To print specific sections, precede the section number with the letter "s". For example, **s3,s5** would indicate to Word that you wish to print sections 3 and 5. If you entered **p4s3-p6s5**, this would indicate to Word that you wish to print from page 4 in section 3 to page 6 in section 5.

Practice Seque	nce
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2	Imagine that you have decided that each new section starts on an odd page (that is a right-hand page as you flick through a book or manual). At the moment, all of your section
	breaks are Next Page except for the last.

3 Ensure you are working in Draft View so that you can easily view your section brea	
Englire Vall are warking in liratt view of that vall can eacily view valir section area	ke

Ensure the Sections for Holidays in the Sun document is open.

1	Click anywhere within section 2. Remember that if you wish to change the type of section
~	break used, you need to be below the section break marker for the section you wish to
	change.

5	Whilst in section 2 choose the Page Setup window launcher icon from the Page Layout
	tab. Click the Layout tab and set the Section start box to Odd Page . Ensure that the
	Apply to box is set to This section. Click OK to continue.

If the section break at the end of section 1 does not automatically update to show the Odd
Page indicator, go to Print Preview mode (from the Office Button) and then close to
return to Draft View

7	Scroll down until you are anywhere in section 3. Using the same instructions as steps 5 and
1	6 above, change the section break to an Odd Page break

0	Preview your document on completion to view its overall layout. Use the Print Layout View
0	and return to page 1 of the document.

9	Select the Insert tab and then, from the Header & Footer group, select Header. Select
	Edit Header.







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