

# Unit 1: Getting Started

## Unit Objectives

In this unit, you will begin to navigate the Word interface and learn the available commands and features. You will then begin to work with documents and change document settings and views. Upon successful completion of this lesson, you will understand the following:

- ☐ Command and Features
- ☐ Work with Documents
- ☐ Document Settings
- ☐ Document Views

# Lesson 1: Commands and Features

## Lesson Objectives

In this lesson, you will be introduced to the Word interface and understand its functions. You will also learn about ScreenTips, ribbons and the Quick Access Toolbar. Upon completion of this lesson, you should be able to identify the following:

- ☐ What is Microsoft Word?
- ☐ Microsoft Word Interface
- ☐ Backstage
- ☐ ScreenTips
- ☐ Quick Access Toolbar
- ☐ Ribbon
- ☐ Ribbon Tabs
- ☐ Understand Ribbon Tabs

# What is Microsoft Word?

## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

Word processing is a method of using a computer to create, edit and print documents such as letters, memos, newsletters, or reports. A word processing program such as Word enables you to accomplish these tasks. The benefit of using a word processing program is that you can store the documents you create on your computer, giving you the option to edit or enhance portions of the entire document at any time.

Word is one of the most popular word processing programs. It incorporates basic word processing functionality for preparing and editing documents and provides many features that enable you to give documents a “professionally-published” appearance. Using Word enables you to focus on your content instead of on formatting as you enter the content. Word includes several features to help you create professional documents:

- Use styles or templates to maintain consistent formatting in documents
- Insert a variety of illustration types such as pictures, diagrams, or shapes into a document
- Use a variety of formatting effects to enhance text or shapes, including Quick Styles galleries
- Combine or merge information together for a mass mailing
- Use tools to assist in creating, modifying, or publishing documents for the Internet

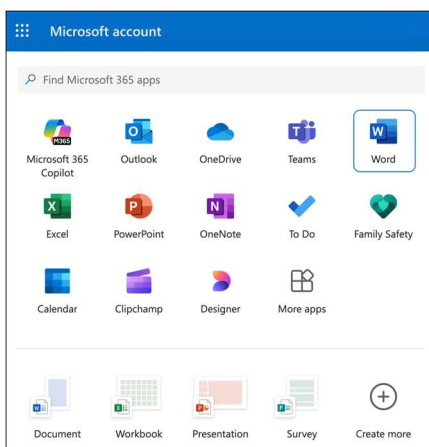
To launch the Word program in Windows, use one of the following methods:

- Use the **WINDOWS** key on the keyboard or the **Start Icon** on the taskbar to open the Startup screen > Select the **Word** tile
- Choose **All apps > Word**

## Microsoft 365 (Web) and Online

To launch the program in Microsoft 365 (Web) and Microsoft Online:

1. In your browser, navigate to [www.microsoft.com](http://www.microsoft.com), [onedrive.com](http://onedrive.com) or [outlook.com](http://outlook.com) > **Sign in**
2. **App launcher** (grid icon in the top left corner) > **Word**

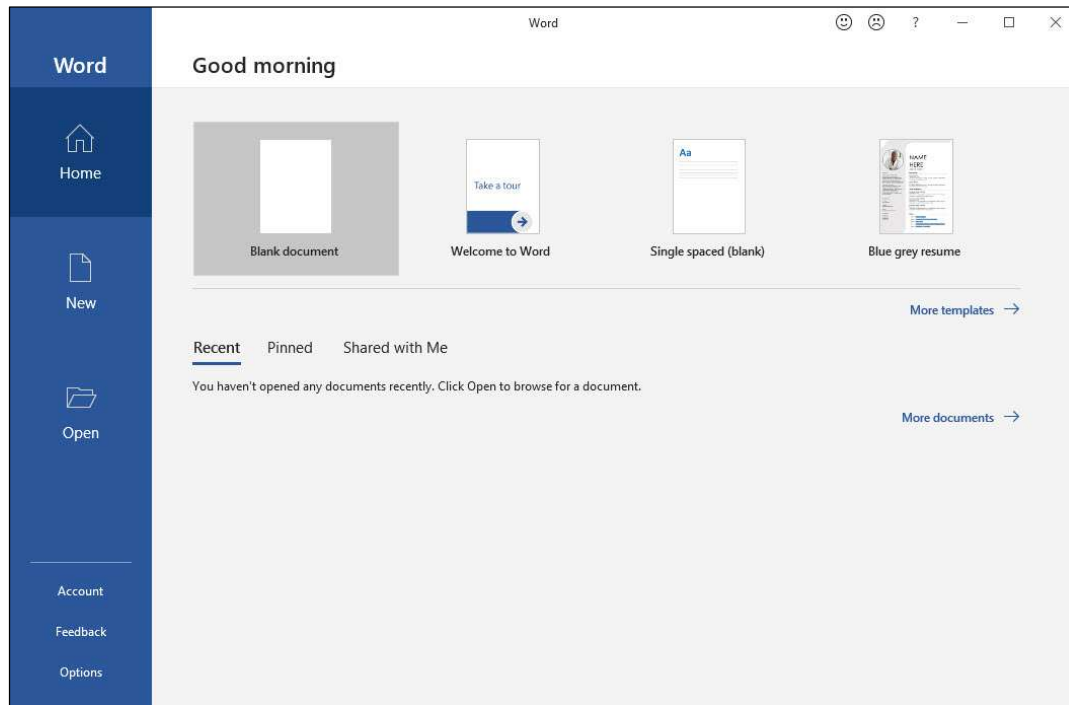


## Learn Task

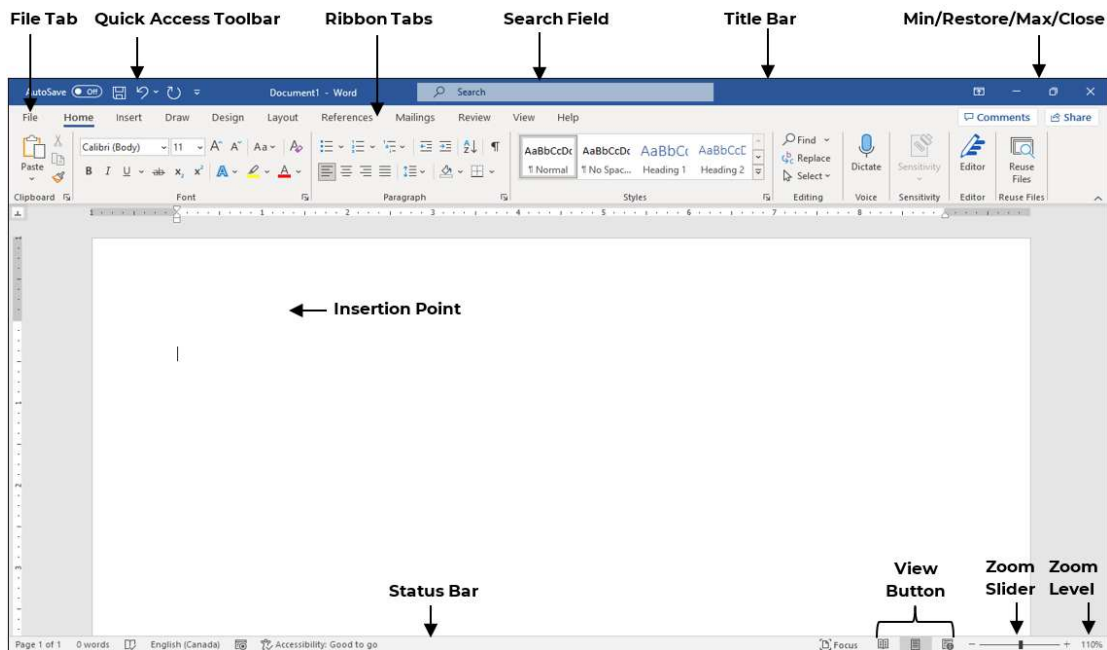
Access the Learner Workbook to complete the Learn Task for this skill.

# Microsoft Word Interface

When Word starts, it displays a Startup screen.



At this point, you can choose to create a new blank document, create a new document using an existing design or template, or open a file from a specific location. For the purpose of viewing the Word screen, we will create a new blank document.



The document window contains the following elements:

<b>File Tab</b>	Select this tab to open the Backstage view to manage files.
<b>Quick Access Toolbar</b>	Gain quick access to frequently used commands.
<b>Ribbon Tabs</b>	Select a tab to access commands to complete a specific type of task.
<b>Title Bar</b>	Indicates which file and program is currently displayed in the window.
<b>Search Field</b>	A Help option where you can enter keywords about a particular type of task and view information from the Word Help system on how to complete that task.
<b>Minimize/Maximize/Restore Down/Close</b>	Affect how much of the application window displays on the screen.
<b>Insertion Point</b>	The flashing bar on the screen that indicates your current position in the document. It is commonly referred to as the cursor.
<b>Status Bar</b>	Find information about the document currently displayed, such as which page you are viewing, the total number of pages, or whether an error condition exists.
<b>View Buttons</b>	Select to quickly change between the different document views available in the application.
<b>Zoom Slider</b>	Select the buttons to zoom in or out in increments of 10% or drag the slider button to a specific zoom percentage.
<b>Zoom Level</b>	Select this button to display a window for various percentages to zoom in or out of the document, including how to display multiple pages.

Not all parts of the screen always appear because you can customize the screen's appearance. For instance, you can choose to turn the ruler on, to assist in positioning text and graphics in your document. You can set up defaults, such as the font or the margins to be used for each new document, customize the commands that appear on the Quick Access Toolbar or even which ribbon tabs are displayed.

### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

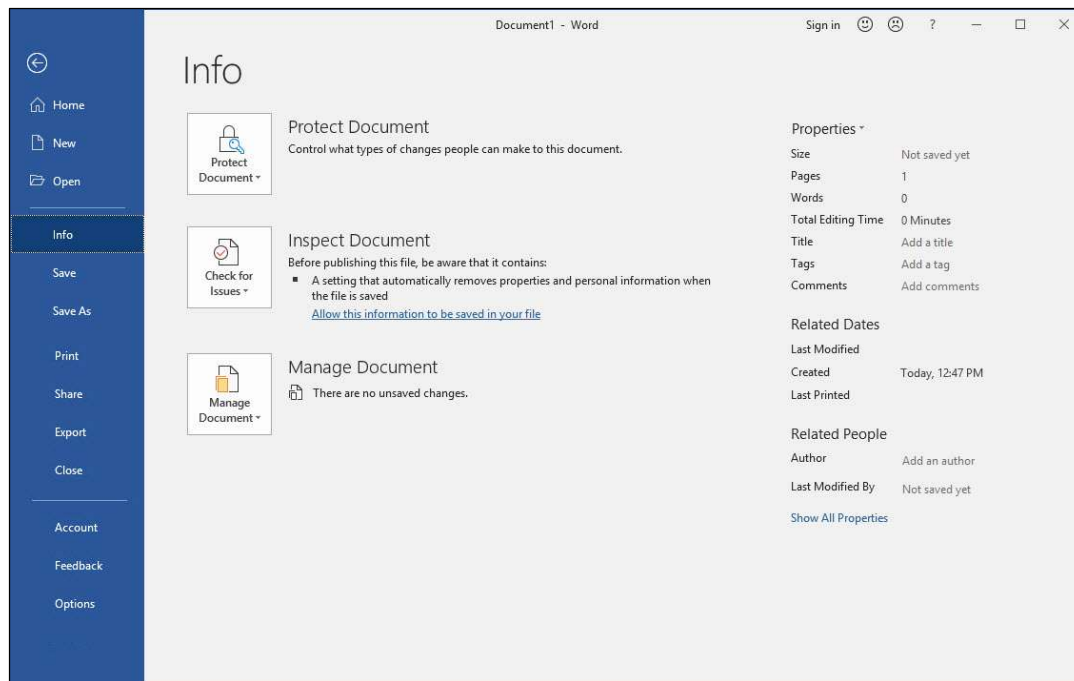
## Backstage

### Desktop Only Alert


The following feature is exclusively available in the desktop version.

When you select the File tab from within an open document, Word displays the **Backstage** view for you to select a command to manage your files. This view is available for all the Office programs, setting a consistent look and location for users to use when they want to manage their files.

Use the Backstage view to create, open, save, print, and manage your files. The commands and options available here are related to things you can do with the entire file itself. For example, you can display information about the file, create a new file, open an existing file, assign a password, save a file with a different name, or print or share the file with others.



You can access the appropriate commands on the various tabs of the Backstage view. These tabs are as follows: Home, New, Open, Info, Save, Save As, Print, Share, Export, Close, Account, Feedback, and Options. The Home tab is the Startup screen.

When you want to exit Backstage view and return to editing your document, select the  **Back** button in the top left corner.

### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## ScreenTips

### Desktop Only Alert

The following feature is exclusively available in the desktop version.

Use **ScreenTips** to help identify buttons or elements on the tabs of the Ribbon and the screen. To view a ScreenTip, position the mouse pointer on the item. A tip displays the name of the button along with a description of its purpose. For some items, a keyboard shortcut may also display as an alternative for activating this feature.



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

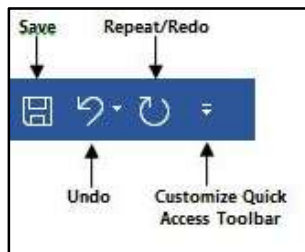
# Quick Access Toolbar

## Desktop Only Alert

The following feature is exclusively available in the desktop version.

The **Quick Access Toolbar** (also known as QAT) is located at the left of the title bar above the Ribbon and contains buttons for frequently used commands. By default, this toolbar contains the AutoSave indicator and the Save, Undo, Repeat/Redo and Customize Quick Access Toolbar buttons.

**Note:** Depending on the configuration of the computing device or if other people use this device, you may have different buttons on the Quick Access Toolbar, such as a button for touch screen or the Print button.



If you use certain Word commands and features very frequently, you can make them more accessible by adding them to the QAT, saving you the effort of having to switch to a different tab to find it in the Ribbon. The combination of being in a convenient location and the ease of customization makes the QAT an ideal location to place your most frequently used commands.

## Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.


# Ribbon

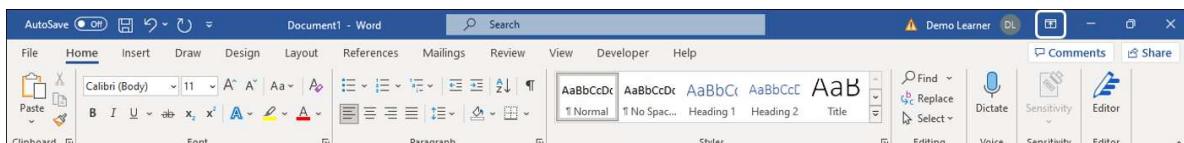
## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

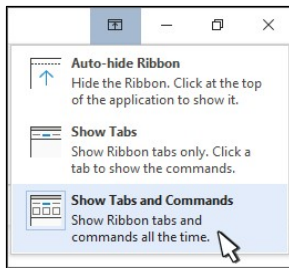
The **Ribbon** is a set of toolbars at the top of the window designed to help you quickly find the commands that you need to complete a task. You can customize how the ribbon is displayed.



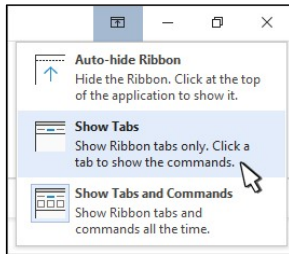
- At the top-right corner, select the  **Ribbon Display Options** icon




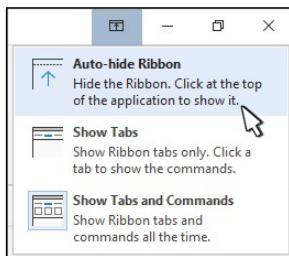
- Choose an option for the ribbon:
  - Show Tabs and Commands** keeps all the tabs and commands on the ribbon visible all the time



- **Show Tabs** shows only the ribbon tabs, so you view more of your document, and you can still quickly switch among the tabs



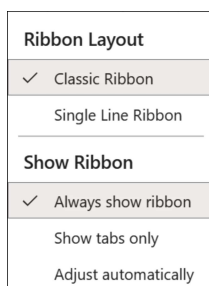
- **Auto-hide Ribbon** hides the ribbon for the best view of your document, and only shows the ribbon when you select **More** , or use the keyboard shortcut **ALT** key



## Microsoft 365 (Web) and Online

To customize the ribbon display in Microsoft 365 (Web):

1. Select the Ribbon drop-down arrow in the bottom-right corner of the Ribbon
2. Under Show Ribbon, select from the following display options:
  - **Always show ribbon** keeps all the tabs and commands on the ribbon visible all the time
  - **Show tabs** only displays the tabs without their groups and commands
  - **Adjust Automatically** hides the ribbon to maximize screen space when not in use, displays it only when you hover your cursor at the top of the screen



**Learn Task** 

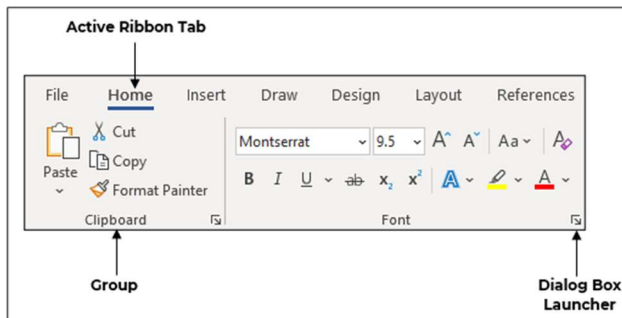
Access the Learner Workbook to complete the Learn Task for this skill.



## Ribbon Tabs

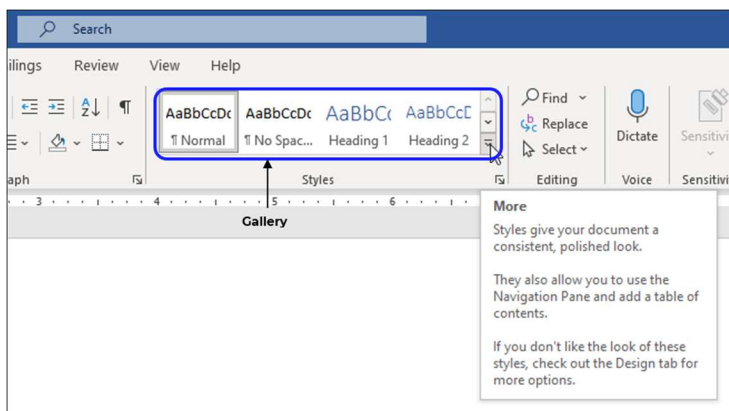
The Ribbon includes **Ribbon tabs** that organizes command buttons into logical groups that relate to a type of activity, such as inserting objects, designing a page, or reviewing a document. Each tab contains **Ribbon groups** with similar commands. For example, the Home tab has a group called Font that contains commands for formatting text characters.

A command that appears in a different background color or has an outline is active. Many of these de-activate when you select the button again or select another choice. For instance, the Bold attribute can be applied to selected text by selecting that button. To turn off the bold attribute, select the same button again.

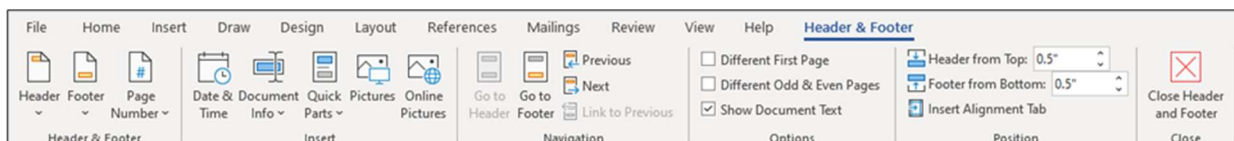


A group could include a **dialog box launcher** which will open a dialog box containing additional tools and options for the Ribbon group.

Some groups contain galleries. Galleries will include a scroll bar with a more option button that you can select to display the full list or gallery for that option.



To reduce screen clutter, **contextual tabs** appear only when they are applicable. For example, the Header & Footer Tools Ribbon tab appears only when you are working with headers and footers.



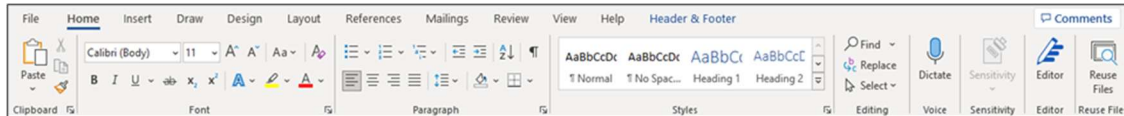
**Learn Task**

Access the Learner Workbook to complete the Learn Task for this skill.

# Understand Ribbon Tabs

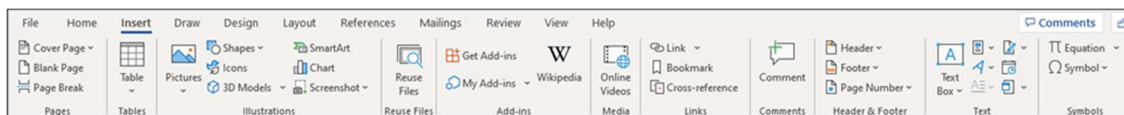
## Home Tab

The Home tab provides several frequently used editing features, such as copy and paste, text formatting with bold, various fonts, alignment, a style etc.



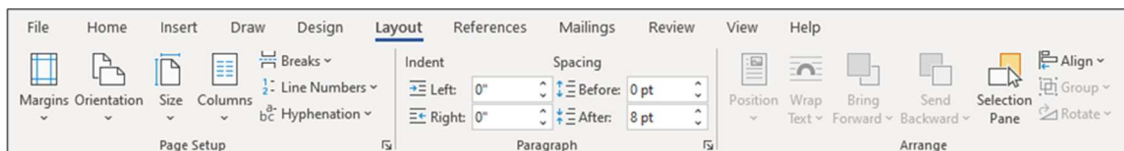
## Insert Tab

The Insert tab allows the user to insert or add extra elements to the document, such as tables, icons, shapes, pages, symbols, etc.



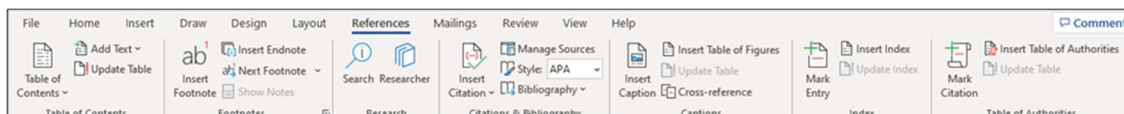
## Layout Tab

The Layout tab allows the user to modify the layout of the document, including the page orientation, margins, page breaks, spacing etc.



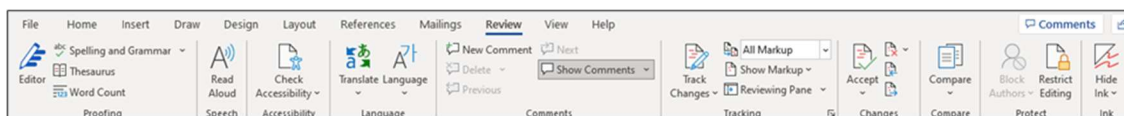
## References Tab

The References tab enables the user to enter document sources and citations, build a table of contents, add footnotes and endnotes, create an index, etc.



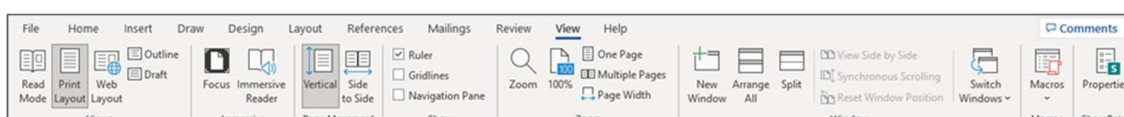
## Review Tab

The Review tab enables users to check grammar, proofread, check accessibility, track changes, add or remove comments, etc.



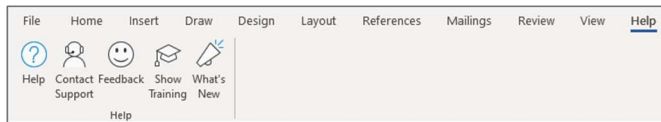
## View Tab

The View tab allows users to shift between different views of the document, change page movement, switch windows and has the feature of the Immersive Reader.



## Help Tab

The Help tab provides you with necessary features such as contacting Microsoft Support, providing feedback to Microsoft, viewing training videos and learning about new tools.

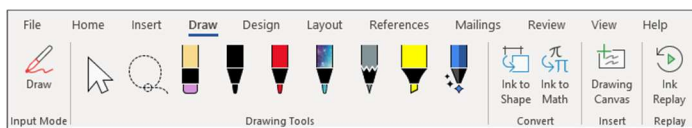


### Desktop Only Alert

The following feature is exclusively available in the desktop version.

## Draw Tab

The Draw tab enables the user to draw and erase using different colors and thicknesses with a pen tool or trackpad.



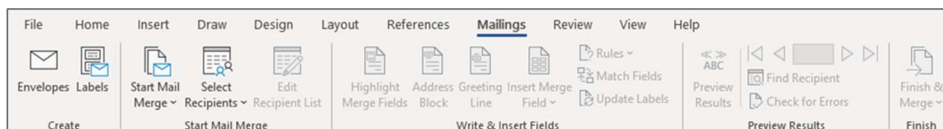
## Design Tab

The Design tab provides various formatting options for your document such as themes, effects, color schemes, paragraph spacing etc.



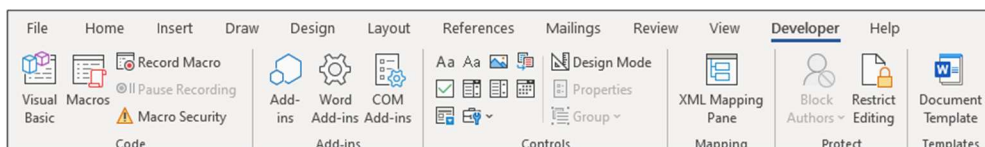
## Mailings Tab

The Mailings tab, which is the least used, allows users to merge emails, write, insert, and merge different fields, etc.



## Developer Tab

The Developer tab includes many tools that can help increase productivity when working with documents, such as macros, installing add-ins, using content controls to build online forms, protect against people making changes, or manage templates. You may need to display this Ribbon as it is hidden by default.



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

### Assessments

Access the Learner Workbook to complete the Practice Exercise and Practice Questions.

# Lesson 2: Work with Documents

## Lesson Objectives

In this lesson, you will be working with documents by creating new documents and document templates. You will open and save documents in a variety of formats. Upon completion of this lesson, you will understand the following:

- ☐ New Documents
- ☐ Document Templates
- ☐ Open Documents
- ☐ Save Documents
- ☐ Save PDFs
- ☐ Convert PDFs to Word Documents
- ☐ Word File Types
- ☐ Identify Extensions

# New Documents

## Online App Alert

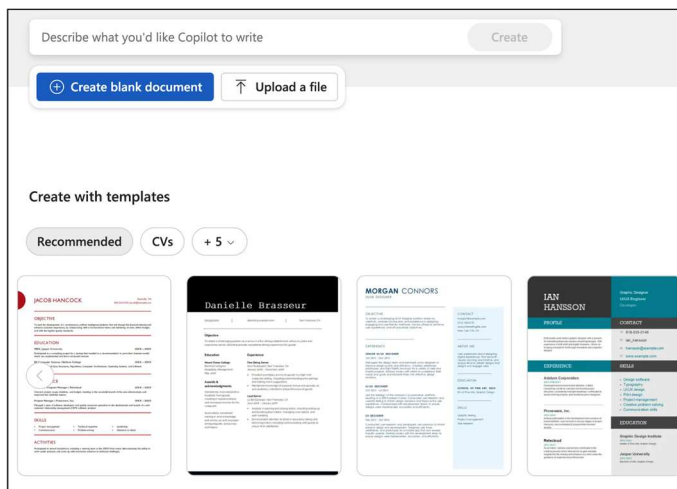
Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

Each time you launch the application, Word displays the Backstage so you can choose to create a new document or open an existing document. To create a new blank document, select **Blank document**. If you are in a document and you wish to create a new blank document, on the **File** tab > **New** > **Blank document**.

## Microsoft 365 (Web) and Online

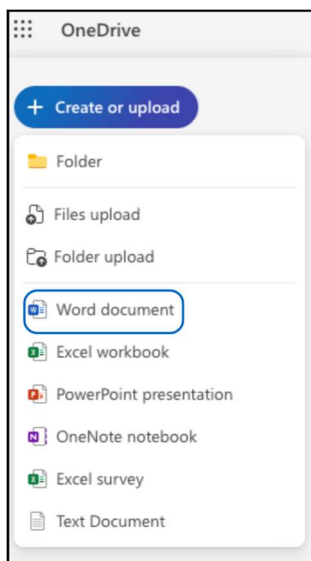
To open a new document in Microsoft 365 (Web):

- **App launcher** (grid icon in the top left corner) > **Word** > **Create blank document**



To open a new document in Microsoft Online:

- **Create or upload** > **Word document**



## Learn Task

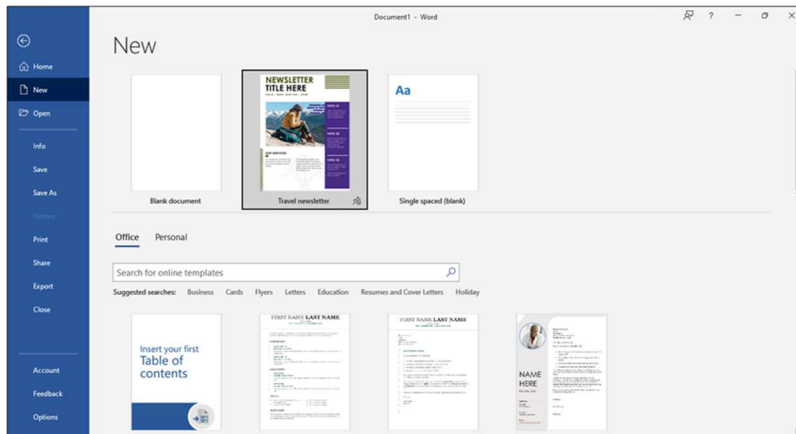
Access the Learner Workbook to complete the Learn Task for this skill.

# Document Templates

## Online App Alert

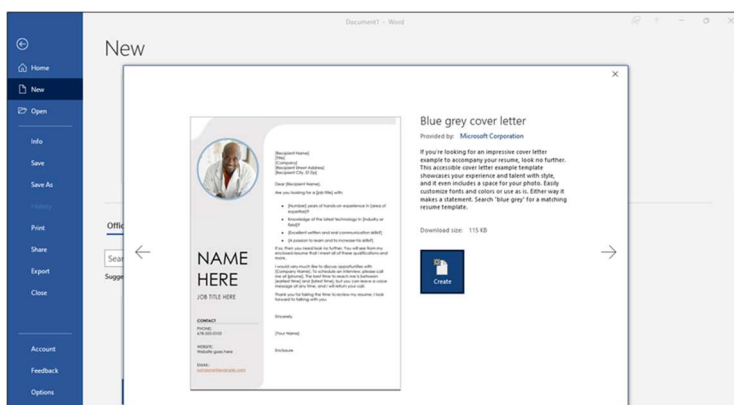
Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

A **template** determines the basic formatting for a document. Templates contain document settings such as fonts, styles, page layout, special formatting, shortcut keys, macros and menus. All Word documents are based on a template.



Use a pre-designed template if you are unsure how to lay out a particular type of document, such as an invitation, meeting agenda, or a business memo. You can select a template design in the New window or enter a type of document you want to use in the Search for online templates field. Using the search option displays a pane at the right where you can continue to narrow the search by selecting categories. You can select the **Close** button for a category if you no longer want to include that category in the search.

When you choose a selection in the list, the template appears as a preview in a new window where you can verify you want this document type by selecting **Create**. If not, select the arrow on either side of the preview to view the previous or next template in the list. You can also select the **Pin** (Pin this item to the list) button to "pin" or position this template near the top of the list for quick access or select the **Close** button for the window to choose another template more suitable for the type of document you want to create.

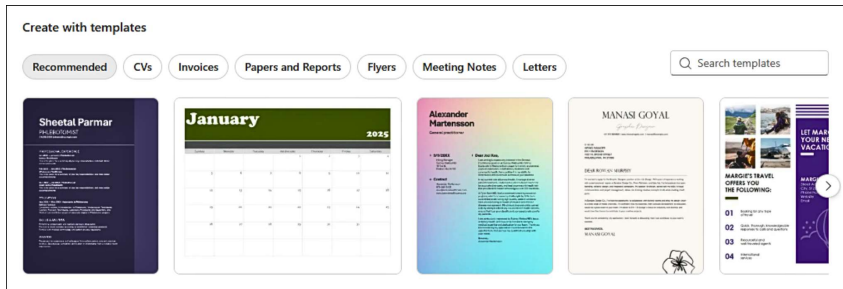


Whenever you create a new document using a document template, Word assigns a number to the end of the file name, usually viewed as [Template Name] 1. This is a reminder to save the file with a name that reflects the content of this document.

## Microsoft 365 (Web) and Online

To open a template in Microsoft 365 (Web):

1. On the **Home** page, under **Create with templates**, use the search box or browse categories.
2. Select the template or hover over the template and select **Edit**.



**Note:** This feature is not available in the free version of Word Online without a Microsoft 365 subscription.

### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Open Documents

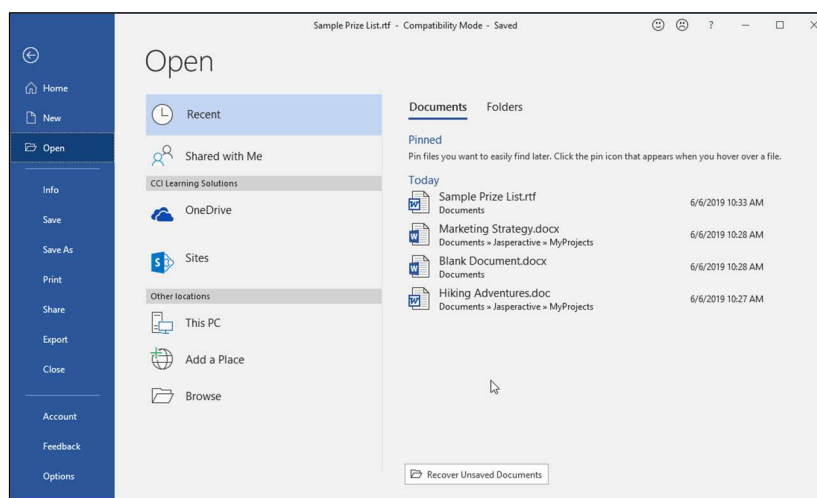
### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

You can open a document from any location, and you can open as many documents as needed. Only the amount of available memory on your system limits the number of documents you can have opened simultaneously.

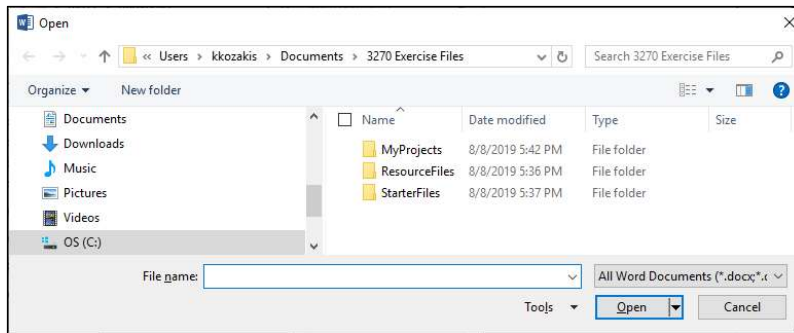
To open a document, use one of the following methods:

- **File** tab > **Open**, and then select the file name from the list of Documents or Folders in the second panel of the Open page



- **File** tab > **Open** > **Browse** to select the file using the Open dialog box



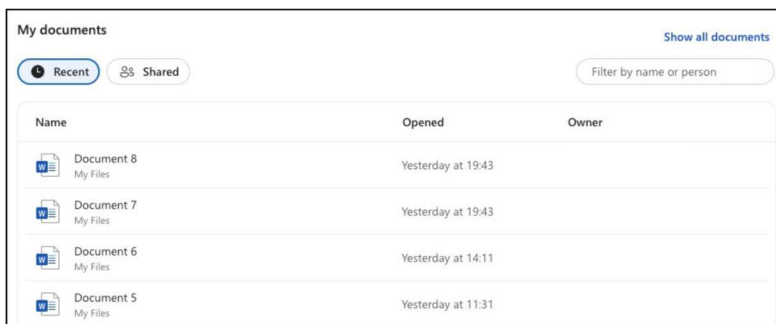


### Microsoft 365 (Web) and Online

To open a document in Microsoft 365 (Web):

On the Word landing page, scroll down to **My documents**.

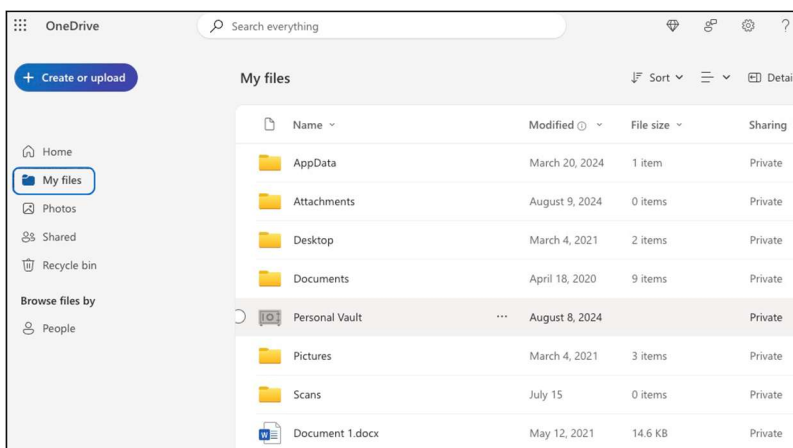
- Recent and shared documents are ordered by the date and time they were last accessed
- Use the **Filter by name or person** search field to find a specific file



To open a document in Microsoft Online:

On the OneDrive landing page, select **My files**.

- Folders and recent documents are ordered by the date and time they were last modified
- Use the top-right drop-down menus to toggle the view options or sort items to find a specific file



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.



# Save Documents

## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

As you begin working with documents, you need to consider how to organize your files for quick access. File organization includes how you name the file, where you **save** it, which specific file type you will assign, and whether you want to add or change the properties of the file to help find it later.

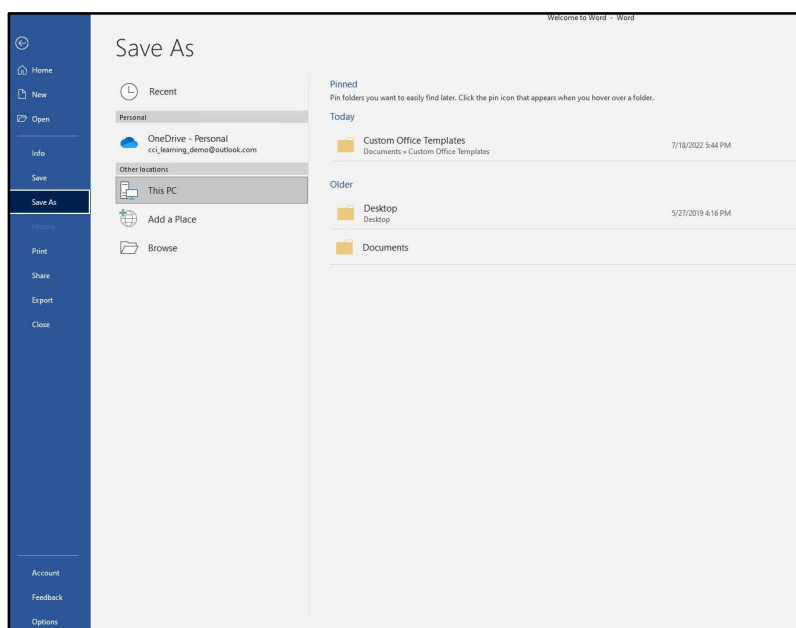
It is important to save your documents as you work on them to be able to use them again. To save changes made to the current document using its current file name, use one of the following methods:

- On the **File** tab > **Save**
- On the **Quick Access Toolbar** > **Save**

When choosing a name for a document you are saving for the first time, consider the following:

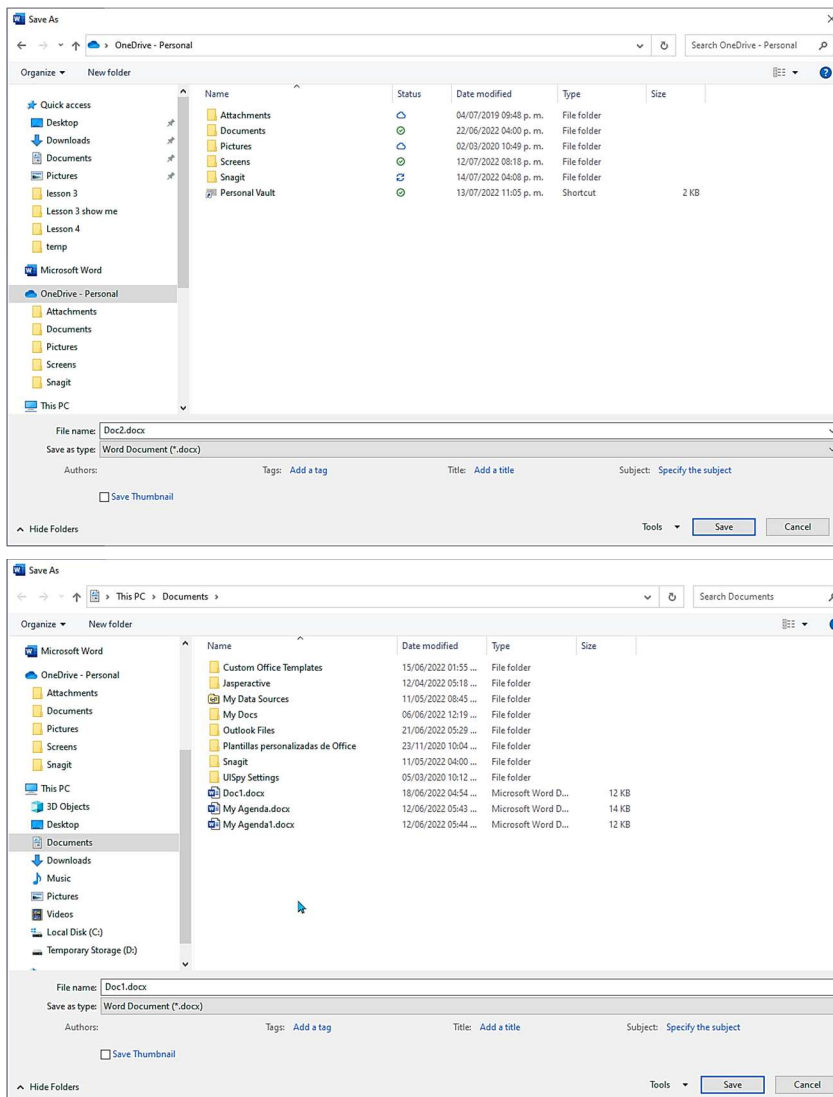
- The file name may be a maximum of 255 characters (including the drive and folder path), and may not include these characters: / \ : \* ? " < > |
- Name the file so you can identify the contents quickly
- When the suggested file name appears in a shaded box, you can accept the suggested name, enter a new name, or modify the suggested name text
- The first time you save a new document, regardless of which method you choose to activate the Save command, the **Save As** page of the Backstage view appears. A list of the folders and locations where you can save the file appears for access. The next time you want to save changes to the document, use any of the Save methods to immediately save the document in the background

To save an existing document with a new name or to a different location, on the **File** tab > **Save As**. The image below illustrates the Backstage view with the Save As tab selected. The first panel in the Save As page displays the available locations for saving your document (these locations are associated with your account).



The second panel provides options regarding the file name and file type. It will also display a list of commonly accessed folders such as Documents or Pictures.

These folders vary based on the location currently selected in the first panel. For instance, the examples below display what might appear if you are using OneDrive, the online storage location provided by Microsoft (you must have a Microsoft account to access the OneDrive location) or the folders available in the Documents folder on the local drive.



Notice how the location is clearly identified at the top of the second panel, thereby giving you the option to select the arrow before the location name if you want to move to another location. You can also select the **More options** link to open the Save As dialog box, from which you can navigate to any location.

**Note:** You can also select **Browse** to open the Save As dialog box.

Select the **Save** button to save the document.

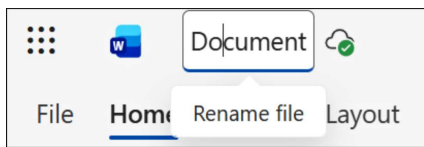
How often you save a document depends on how much work you put into it. If you make many changes, save the document frequently as you work to preserve your changes. If you notice a message from Word prompting you to save a document, this means Word recognizes something has changed in the document since it was last saved. If you're not sure whether you should save the document again, err on the side of caution and save it with a name that differs from the original.

### Microsoft 365 (Web) and Online

On Microsoft 365 (Web) and Online, the file is saved to **OneDrive** and changes are automatically saved as you work.

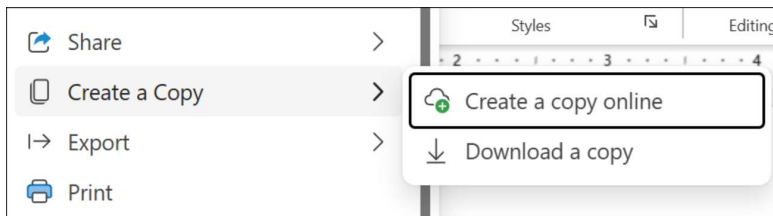
To change the document name:

- **File** tab > **Rename** > change the name in the **File Name** field > **ENTER**
- Select directly in the **File Name** field in the top-left section of the workspace

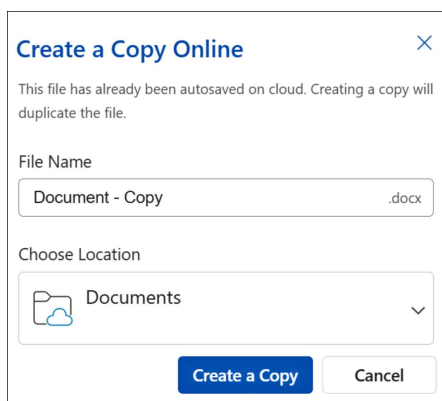


To save a copy of the document:

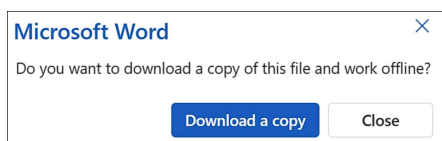
1. **File** tab > **Create a Copy**



- Choose **Create a copy online** > modify the file name if needed and select the location > **Create a Copy**



- Select **Download a copy**, then choose between **Download a copy**



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

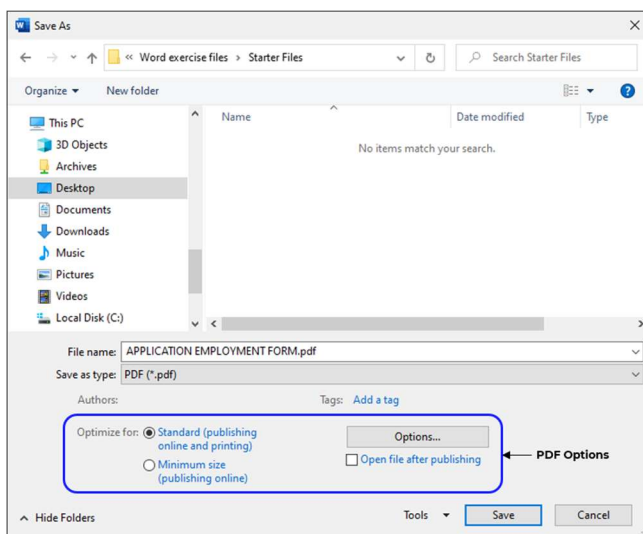
## Save PDFs

### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

This feature demonstrates how powerful a program Word is, giving you access to documents you previously could not access without the appropriate software for the file format. Portable Document Format, or **PDF**, is a file format used to maintain the design layout and format of a file for distribution to others, restrict the editing of file contents, or to make a file smaller so it can be set up as a link on a web site for downloading.

To save a document as a PDF, on the **File** tab > **Save As** > **File type** drop-down arrow > **PDF (\*.pdf)**. Enter the name for the PDF file if different than the Word file, and then select **Save**. Word also provides some options you can set for the PDF file.

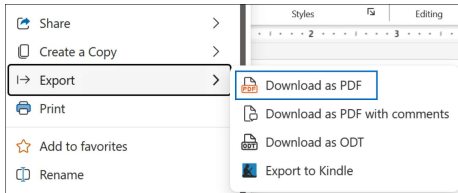


Depending on which application may be installed on your system to display PDF files, the new PDF file then opens in that application to display the results.

### Microsoft 365 (Web) and Online

To save as a PDF in Microsoft 365 (Web) and Online:

1. Select **File** tab > **Export**
2. Choose **Download as PDF > Download**
  - The file downloads to your device in PDF format



#### Learn Task

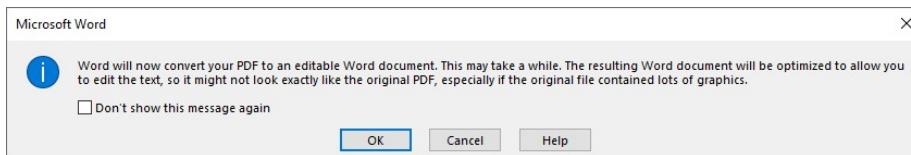
Access the Learner Workbook to complete the Learn Task for this skill.

## Convert PDFs to Word Documents

#### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

When you use Microsoft Word to open a PDF as if it were a Word document, it will convert the PDF into an editable Word document.

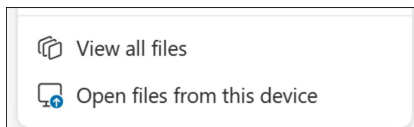


Once you select **OK**, the PDF document opens as a Word document, and you can edit it as if it had been a Word document originally. When changes are complete, you can choose to save it as a Word document, or choose another file format including PDF, using the Save as type field.

### Microsoft 365 (Web) and Online

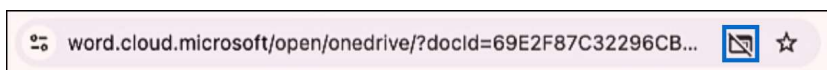
To open a PDF file in Microsoft 365 (Web) and Online:

1. Select **File** tab > **Open > Open files from this device**



2. Choose the PDF from your device > **Open > Open**
  - Word converts the file to an editable document and saves it to OneDrive

**Note:** If the PDF does not open in a new browser, it is recommended to check your pop-up blocker settings. If this is the case, a pop-up blocker icon can be viewed in the browser status bar.



#### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

# Word File Types

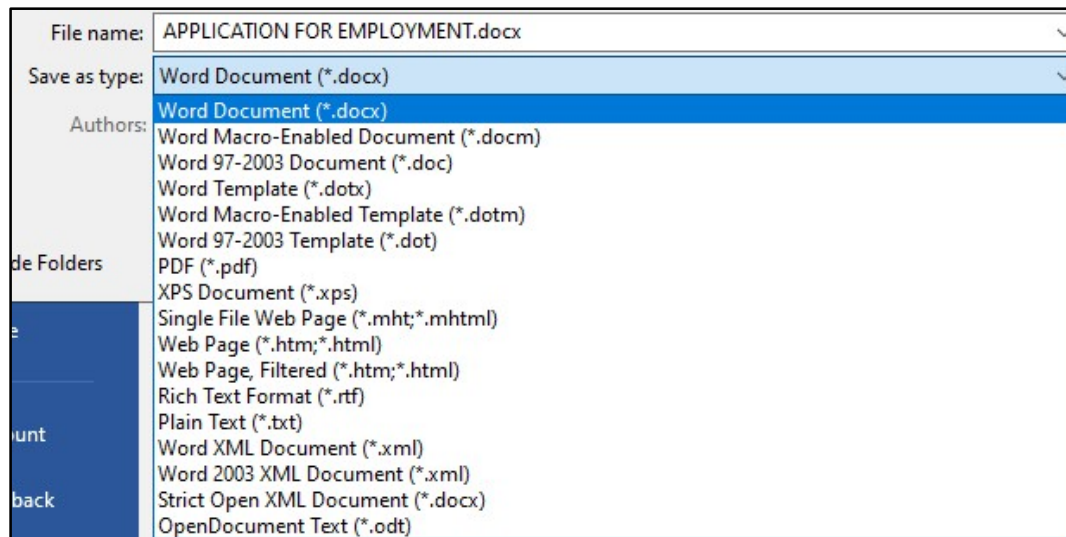
## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

By default, Word automatically assigns a **.docx** extension to the end of the file name. However, you can save a Word document in other **file formats**. All Word Documents include file formats that are original to Microsoft Word, including:

<b>.doc</b>	Word Document prior to 2007
<b>.docx</b>	Word Document 2007 or later
<b>.docm</b>	Macro-Enabled Document
<b>.dot</b>	Template prior to 2007
<b>.dotx</b>	Template 2007 or later
<b>.dotm</b>	Macro-Enabled Template

To save a Word document to a different file type, on the **File** tab > **Save As** > **File type** drop-down arrow > (the field below the File name field) to display the drop-down menu of available file formats.



## Microsoft 365 (Web) and Online

In Microsoft 365 (Web) and Online, documents are automatically saved with the .docx extension. Other formats available are found in the **File** tab > **Export** drop-down menu.

- **.pdf (Portable Document Format)** - Best for sharing final versions of documents as the layout, images and fonts don't change
- **.odt (OpenDocument Text)** - Mainly used when sharing a document with someone who does not use Microsoft Word

## Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

# Identify Extensions

## Desktop Only Alert

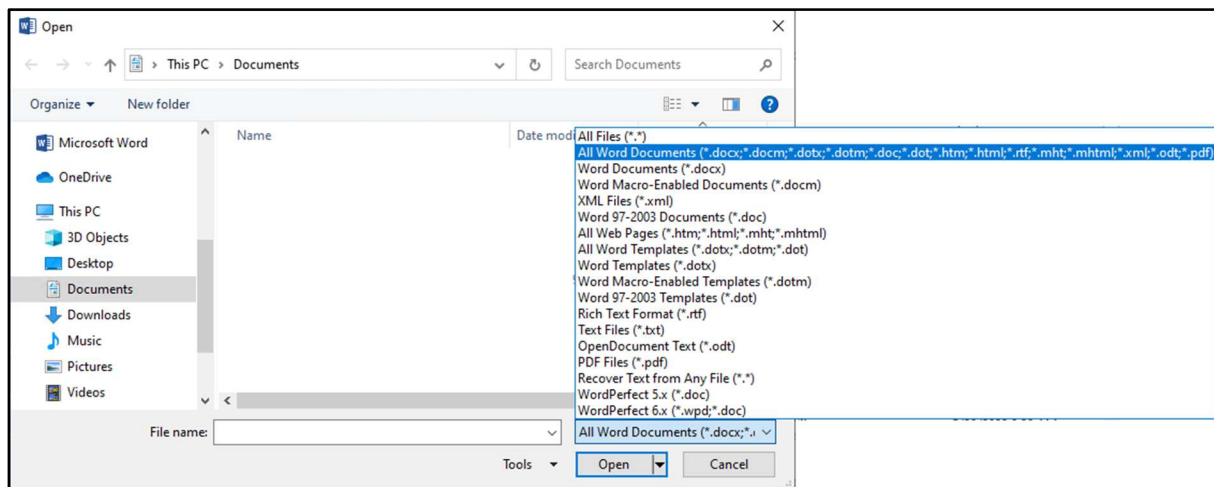
The following feature is exclusively available in the desktop version.

Word, like most word processing applications, can handle several document types. This allows you to create a file in one program and save it to a format readable by other programs. For example, if you create a file in Word and need to share the file with someone who does not have Word but has an application that supports any of these listed file types, you can save your document to the type you have in common and successfully share the file.

Commonly used file types available in Microsoft Word include:

<b>PDF (.pdf)</b>	Portable Document Format (PDF) is a file format developed by Adobe that allows you to view documents (with formatting and images) in a web browser or other programs.
<b>XPS Document (.xps)</b>	XML Paper Specification the file owner controls who can open the file. Recipients who have not been granted rights cannot view the XPS file.
<b>Rich Text Format (.rtf)</b>	A text file that preserves font and paragraph formatting and can include embedded images.
<b>Plain Text (.txt)</b>	A text file that can be read by any program on any operating system. This format does not include formatting of any kind, nor does it include images.

You can, search for files saved in formats that are not original to Word. On the **File** tab > **Open** > **Browse** > **All Word Documents** to open the drop-down menu. The options in the drop-down menu indicate that Word can open several types of documents.



Notice that the option to the right of the File name field indicates that Word will display All Word Documents. This is the default setting.

## Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Assessments

Access the Learner Workbook to complete the Practice Exercise and Practice Questions.



# Lesson 3: Document Settings

## Lesson Objectives

In this lesson, you will be introduced to the document settings and learn how to inspect a document, check accessibility and compatibility as well as print, preview and share documents. Upon completion of this lesson, you will understand the following:

- ☐ Review Document Statistics
- ☐ Document Properties
- ☐ Inspect Document
- ☐ Check Accessibility
- ☐ Check Compatibility
- ☐ Print Preview
- ☐ Set Print Parameters
- ☐ Share Documents



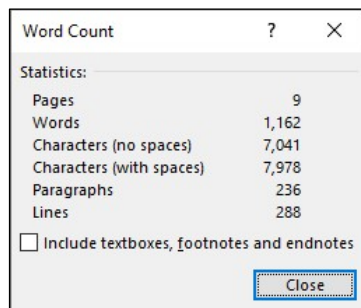
## Review Document Statistics

### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

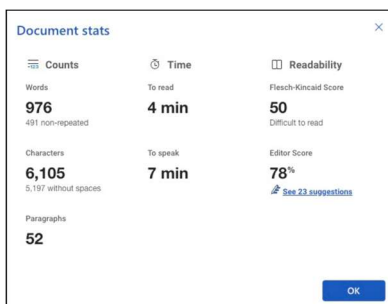
Display document statistics to help determine the document's structure, usually for estimating the amount of work required to modify the document. For example, the image below demonstrates the number of pages and text statistics that need to be reviewed and updated. These statistics can give you a better estimate of the amount of time you will need to dedicate to this project, especially if you know the document was created five years ago.

To check the document statistics, on the **Review** tab > **Proofing** group > **Word Count**.



### Microsoft 365 (Web) and Online

In Microsoft 365 (Web) and Online, additional statistics are displayed such as Time to read, time to speak and Readability scores.



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

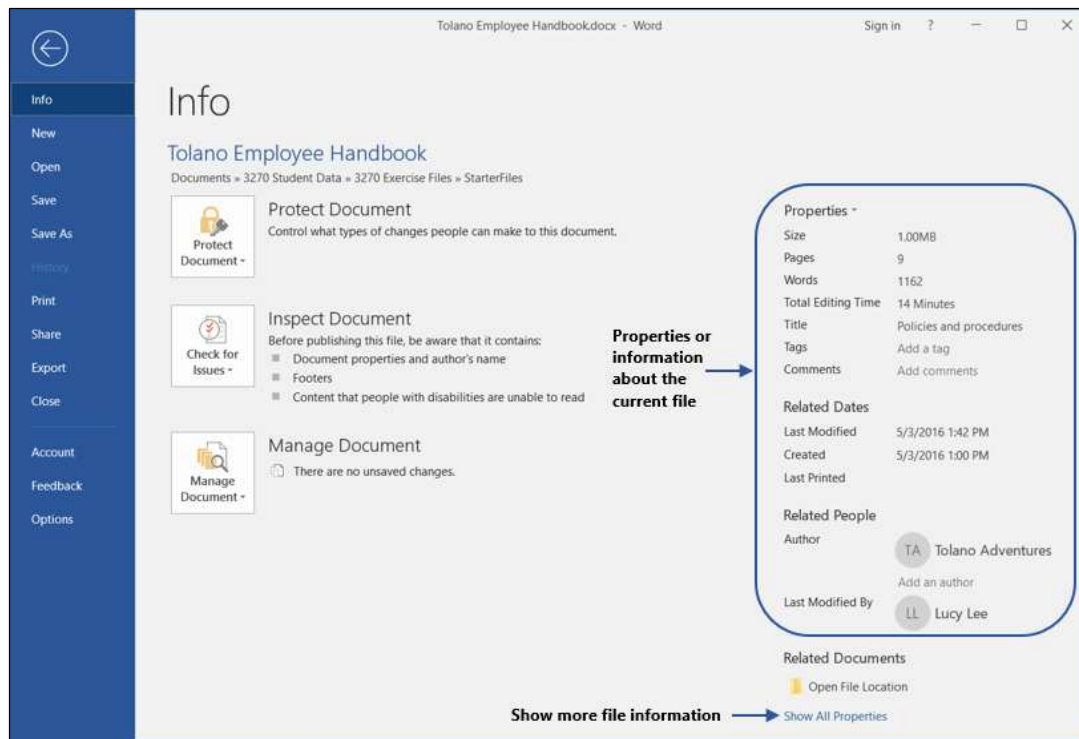
## Document Properties

### Desktop Only Alert

The following feature is exclusively available in the desktop version.

Document properties provide information to assist in locating a file based on specific search criteria. How much information you enter will depend on standards set up in your office, or which information you want to use to find documents later.

To view the properties for the current document, on the **File** tab > **Info**, and review the information in the Properties section on the Info page in the Backstage. The file properties appear in the panel at the right. If you need to view more information about the file, select the **Show All Properties** link at the bottom of the list of fields to display all the properties.



To add properties to the file or to customize the properties information, select **Properties > Advanced Properties** to open the Properties dialog box. Using this dialog box, you can add or customize properties for the document, such as its subject or category. Each tab in this dialog box displays different information for viewing or modifying. For instance, use the Summary tab to insert specific information pertaining to this file.

### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

# Inspect Document

## Desktop Only Alert

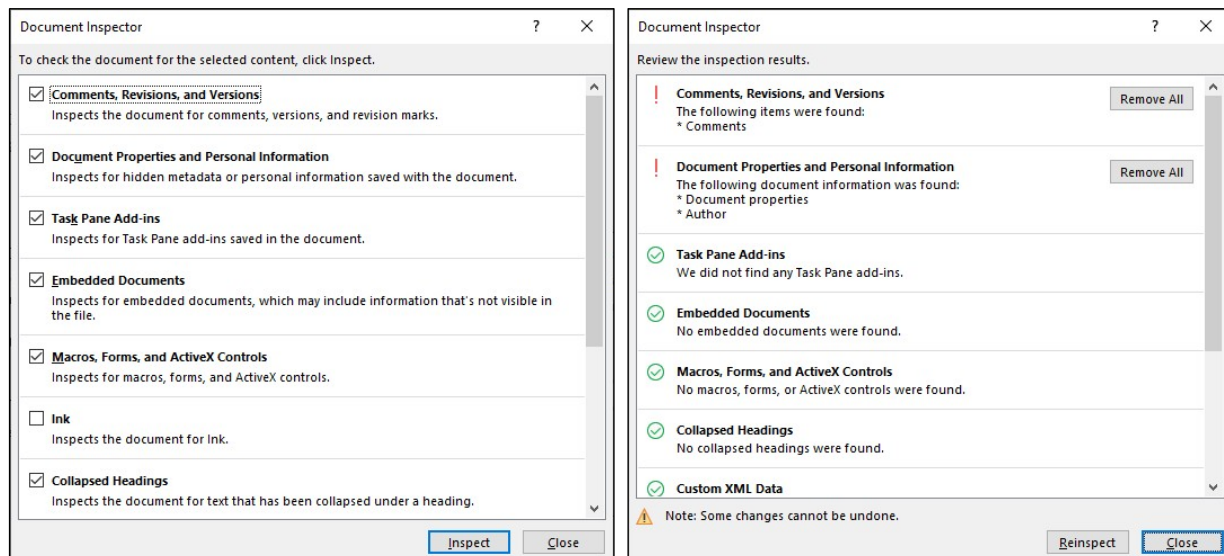
The following feature is exclusively available in the desktop version.

The **Document Inspector** is designed to look for certain types of data stored in documents and then report them to you, such as hidden properties and personal information that you might not want others to view. Some of these items include:

- Comments, revision marks, and document versions
- Metadata and personal information about the document's originator
- Information in headers or footers, including watermarks
- Text that was hidden using the Hidden text effect

By knowing that these types of data exist in a document, you can decide whether it is appropriate to keep this data.

Select on the **File** tab > **Info** > **Check for Issues** > **Inspect Document** to open the Document Inspector. You may be prompted to save the document before proceeding with the inspection.



Select the options you want Word to check in the document, then select **Inspect**. After a few moments, Word displays the inspection results, and indicates which items may need to be addressed before the document is shared with others.

Select **Remove All** for those items you want Word to remove completely. This process is one of the last steps you apply to a document before distributing it. For instance, you may want to ensure all revisions and tracked changes are removed from the document before sending the document to others.

## Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

# Check Accessibility

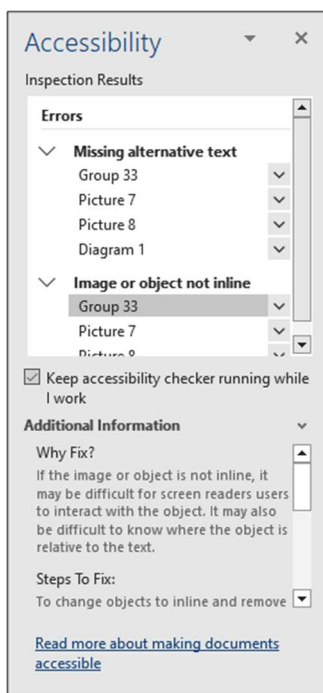
## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

Word also provides the **Accessibility Checker** feature that you can use to check your documents for any accessibility issues.

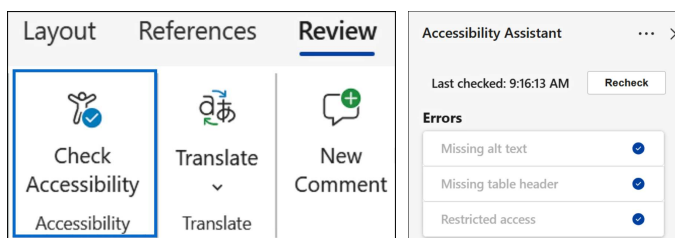
The Accessibility Checker feature focuses on items that may be missing or misunderstood if there are no details or tags to help identify the item for visual or audio recognition, such as hard-to-read text, contrasts, or missing alternative text.

On the **File** tab > **Info** > **Check for Issues** > **Check Accessibility** to open the Accessibility Checker task pane. You can select an item from the list to have Word display an explanation of how to fix the issue.



## Microsoft 365 (Web) and Online

Select **Review** tab > **Accessibility** group > **Check Accessibility**. The Accessibility Assistant will open to the right. Errors, Tips and Warnings will be listed if available. Use the **Recheck** button to ensure that all issues have been addressed.



## Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

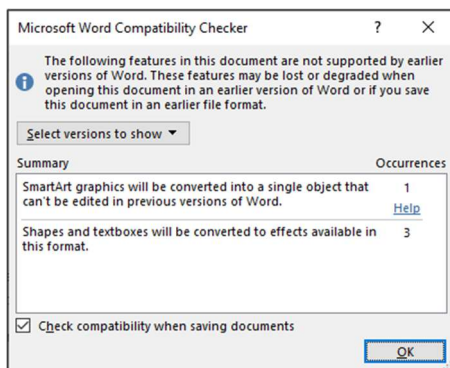
# Check Compatibility

## Desktop Only Alert

The following feature is exclusively available in the desktop version.

Occasionally, you may need to work with documents that require a previous version of Word, such as a friend who uses Office 2019 while you are using 2024. When you open a document that has been saved in the Word 97–2003 format, the document opens in Compatibility mode automatically. You can make changes to this document and choose to save it with the Word 97–2003 format or update it to the current version (Word 2024).

If you need to save a document in an earlier version of Word, you may find there are features that will not be supported when you save the file. For example, shapes and text boxes will be converted to effects, and SmartArt diagrams will be converted to a single (non-editable) image. Word provides the **Compatibility Checker** to check the document and alert you about any features that will not be compatible if you save it to an earlier version of Word.



Select the **File** tab > **Info** > **Check for Issues** > **Check Compatibility** to open the Compatibility Checker.

Potential issues appear in the list, and you need to decide whether to continue saving the file in this file format or return to the document to make appropriate changes. For instance, SmartArt is a feature that did not exist in versions earlier than Word 2007. If you need this document to be available in a version earlier than Word 2007, the SmartArt image will appear in the document, but cannot be modified.

## Learn Task

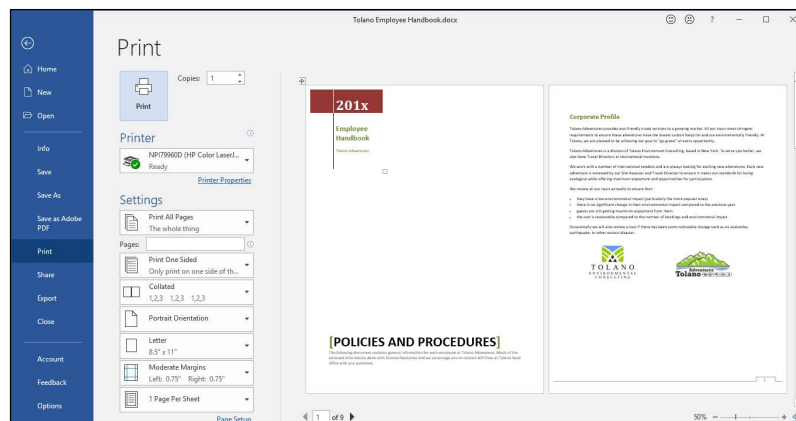
Access the Learner Workbook to complete the Learn Task for this skill.

# Print Preview

## Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

On the **File** tab > **Print** to preview how the document will print. All headers, footers, multiple columns, and page numbers appear in their appropriate locations. You can also make changes to the margins, paper size, or orientation from the Backstage view, similar to opening the Page Setup dialog box.



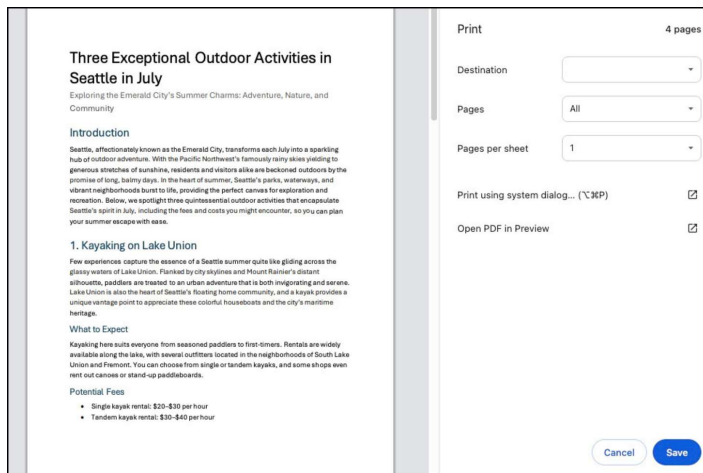
Use the zoom slider at the lower right to zoom in or out of the preview or select the **Zoom to Page** button to preview the full page.

### Microsoft 365 (Web) and Online

In Microsoft 365 (Web) and Online, selecting **File** tab > **Print** will open your browser Print dialog box with the following settings:

- **Destination** - Select a printer
- **Pages** - Choose between All, Odd, Even or Custom pages to print
- **Pages per Sheet** – Fits the number of pages into a single sheet

Select the System dialog box launcher to modify additional Print settings then select **Save** when ready to print.



Learn Task

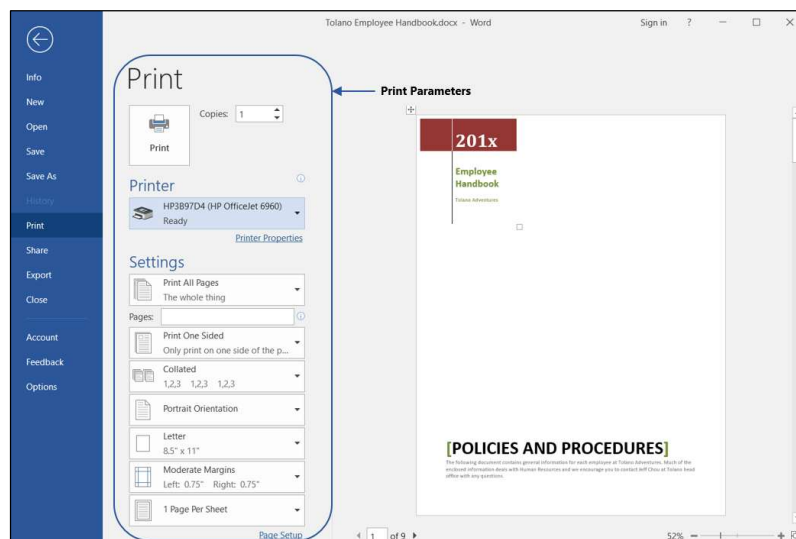
Access the Learner Workbook to complete the Learn Task for this skill.

## Set Print Parameters

Desktop Only Alert

The following feature is exclusively available in the desktop version.

To preview or print a document, select **File** tab > **Print**.



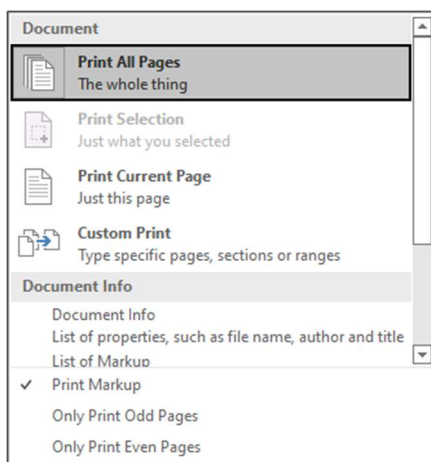


All print options are available in this view.

<b>Print</b>	Select to send the document to the printer using the specified options.
<b>Copies</b>	Specify the number of copies to be printed.
<b>Printer</b>	Specify the active printer. To change settings for the printer (such as to print in color), select <b>Printer Properties</b> .
<b>Settings</b>	Select different options on how to print the document, as required.

These settings include:

- **Print All Pages** – Set print options for the document, such as printing the whole document, printing a selection of text, printing only the current page, etc.

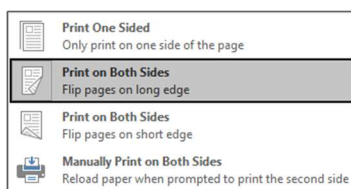


- **Pages** – Specify the page range to print

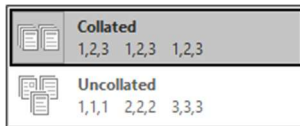


<b>#-#</b>	Only the page range specified; for example, 3-7, 1-3
<b>#, #, #</b>	Only the pages specified; for example, 3,5,6
<b>-#</b>	From page 1 to the specified page; for example, -11
<b>#-</b>	From this page to the last page; for example, 33-
<b>s#-s#</b>	From one section to another section; for example, Section 9 to Section 11

- **Print One Sided** – Specify to print on both sides and specify whether to flip pages on the long edge or the short edge



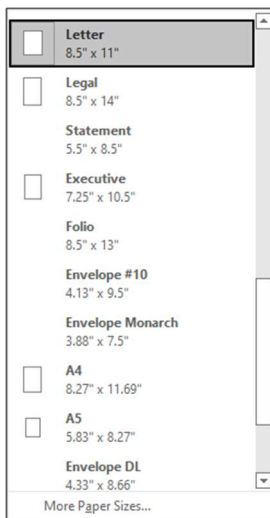
- **Collated** – Specify how multiple copies of the document will be printed. Collated prints one copy of the entire document followed by a second copy of the entire document. Uncollated prints all copies of page 1 followed by all copies of page 2



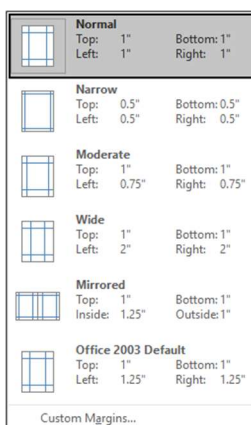
- **Page Orientation** – Specify your preferred page orientation. Printing in portrait orientation is vertical and landscape orientation is horizontal



- **Letter** – Specify your desired paper size. The default paper size is Letter 8.5" x 11". Select one of the preset sizes or select **More Paper Sizes** to create a custom paper size

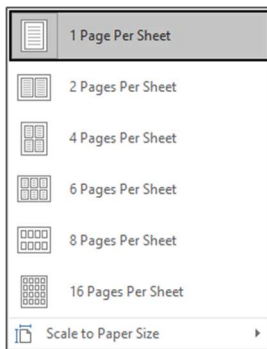


- **Normal Margins** – Specify your margin preference. By default, each page has a one-inch margin. You can customize or choose predefined margin settings, set margins for facing pages, allow extra margin space to allow for document binding, and change how margins are measured

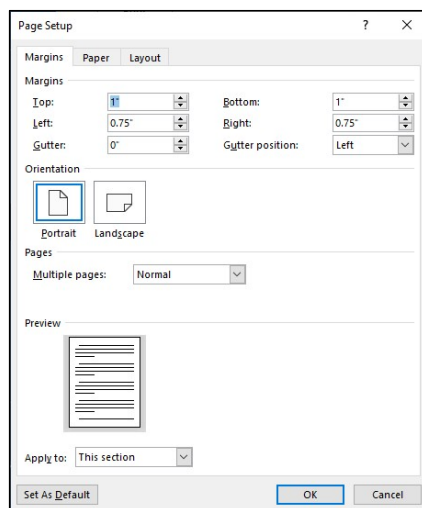


- **1 Page Per Sheet** – Specify your scaling options. By default, Word prints 1 page per sheet. You can choose to print multiple pages on one sheet of paper or scale to a specific paper size. Scaling the document does not affect the document, only how it prints. This is useful for minimizing the number of printed pages or printing to a different paper size





- **Page Setup** – Use the Page Setup dialog box to make other page layout changes to the document



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Share Documents

### Online App Alert

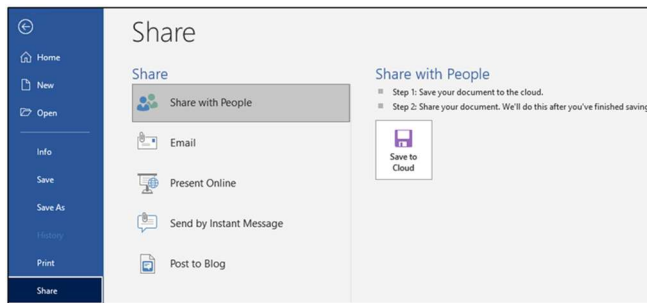
Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

In the modern workplace, you will need to share files and collaborate in different ways. There are a variety of ways you can share your documents. These include:

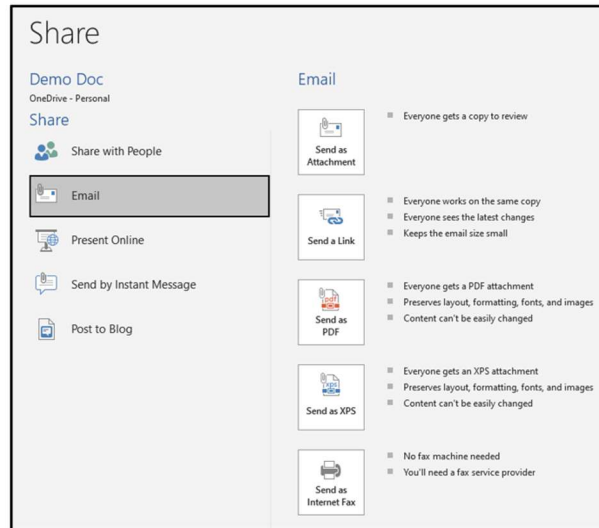
- Share with people by sending invitations and receive sharing links
- Email an attachment, link, PDF, XPS, or Internet fax
- Present the document to people who can watch in a web browser
- Send your contact an instant message containing a link to the document
- Create a new blog post using the document

To share your documents, select **File > Share** then use one of the following methods:

1. Share with People
  - Step 1: Save your document to the cloud
  - Step 2: Share your document



## 2. Email



<b>Send as Attachment</b>	Everyone gets a copy to review
<b>Send a Link</b>	Everyone works on the same copy Everyone views the latest changes Keeps the email size small
<b>Send as PDF</b>	Everyone gets a PDF attachment Preserves layout, formatting, fonts, and images Content can't be easily changed
<b>Send as XPS</b>	Everyone gets an XPS attachment Preserves layout, formatting, fonts, and images Content can't be easily changed
<b>Send as Internet Fax</b>	No fax machine needed You'll need a fax service provider

## 3. Present Online

- Present the document to people who can watch in a web browser
- No setup required
- A link is created to share with people
- Anyone using the link can view the document while you are presenting online
- The document will be made available for download

## 4. Send by Instant Message

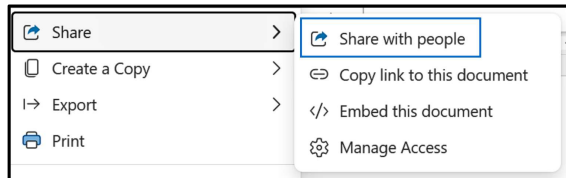
- Attach a copy of the document to an instant message
- Everyone gets a copy to review

## 5. Post to Blog

- Create a new blog post using the document
- Some supported blogging sites include:
  - SharePoint Blog
  - WordPress
  - Telligent Community
  - TypePad

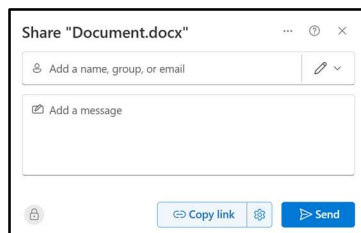
### Microsoft 365 (Web) and Online

In Microsoft 365 (Web) and Online, the following sharing options are accessed on the **File** tab > **Share** command.

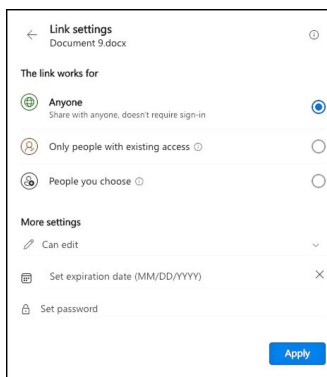



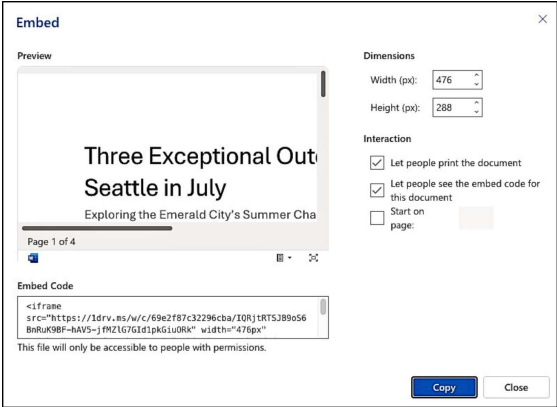
#### Share with people

Share with a group, a name or email, add an optional message and select **Send**.



Anyone with the link can edit the document, unless the **Link settings** are modified. Select the gear icon in the top-right corner to choose editing permissions, an expiration date and a password and **Apply** when done.



<p><b>Copy link to this document</b></p>	<p>This command generates a link that can be pasted and shared. Select the <b>Settings</b> gear icon to modify permission for the document. Select <b>Copy</b> when you are ready to proceed.</p> 
<p><b>Embed this document</b></p>	<p>This command embeds an interactive version of your file into another location, such as a webpage, a SharePoint page, or even another document. Instead of just attaching or uploading the file, embedding lets people view and sometimes interact with the document right where it's placed, without needing to open it separately. Ensure all the settings are correct and select <b>Copy</b>.</p> 

**Learn Task** 

**Access the Learner Workbook to complete the Learn Task for this skill.**

**Assessments** 

**Access the Learner Workbook to complete the Practice Exercise and Practice Questions.**

# Lesson 4: Document Views

## Lesson Objectives

In this lesson, you will be introduced to document views and learn how to change and manage them. You will also learn to split the window, change the zoom, use show/hide, the ruler and gridlines. Upon completion of this lesson, you will understand the following:

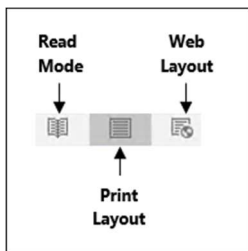
- ☐ Change the View
- ☐ Manage Views
- ☐ Manage Outline View
- ☐ Zoom
- ☐ Split the Window
- ☐ Show/Hide ¶
- ☐ Ruler
- ☐ Gridlines

## Change the View

### Desktop Only Alert

The following feature is exclusively available in the desktop version.

Word offers a variety of options to view a document. Each has its own use in the program. These three view types are the most used: **Read Mode**, **Print Layout**, and **Web Layout**. You can use the View buttons on the status bar to change the view. They are located at the bottom right of the screen.



<b>Read Mode</b>	Useful for reading a document, as pages are adapted to the size of your monitor for quick reading. The Ribbon is hidden so you can focus on reading the document at the maximum size for your monitor.
<b>Print Layout</b>	Use this view to adjust the overall layout of information on the document page, or to show how the printed document will appear. As you are focusing on the layout of the printed document, you can notice how graphical elements such as headers/footers, pictures, or columns appear.
<b>Web Layout</b>	Useful for creating web pages, text wraps to the screen size, backgrounds and pictures appear as they would when using a web browser that requires HTML (HyperText Markup Language) code.

### Learn Task

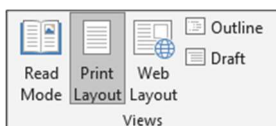
Access the Learner Workbook to complete the Learn Task for this skill.

## Manage Views

### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

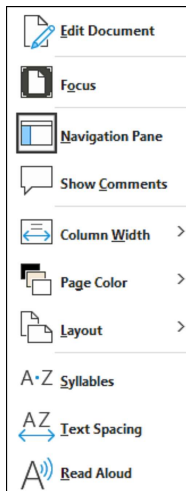
Word's primary view is the Print Layout view, which displays your document as it would appear when printed, complete with margins, page breaks, and other visual elements. But that's not the only view that Word offers. To access additional document views, use the **View** tab.



## Read Mode

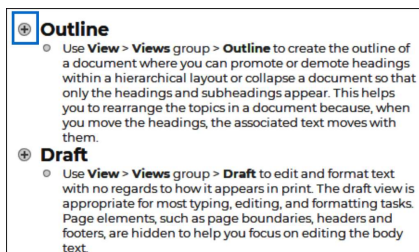
When you are not writing or editing, use **View** tab > **Views** group > **Read Mode** to hide the writing tools and menus and to leave more room for the pages themselves. Read Mode automatically fits the page layout to your device, using columns and larger font sizes, both of which you can adjust. All **view options** in Read mode are located on the **View** tab drop-down menu.

From here you can return to the Print Layout view, view the Navigation Pane, Show Comments, adjust the Column Width, change how you view Page Color or Layout, view Syllables, Text Spacing, and Read Aloud options.



## Outline

Use **View** tab > **Views** group > **Outline** to create the outline of a document where you can promote or demote headings within a hierarchical layout or collapse a document so that only the headings and subheadings appear. This helps you to rearrange the topics in a document because, when you move the headings, the associated text moves with them.

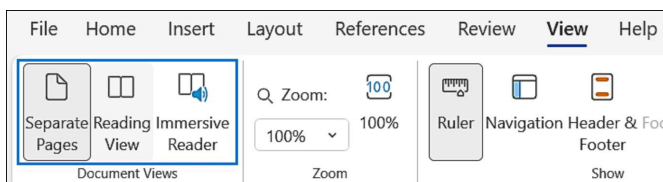


## Draft

Use **View** tab > **Views** group > **Draft** to edit and format text with no regards to how it appears in print. The draft view is appropriate for most typing, editing, and formatting tasks. Page elements, such as page boundaries, headers and footers, are hidden to help you focus on editing the body text.

### Microsoft 365 (Web) and Online

In Microsoft 365 (Web) and Online, select the **View** tab > **Document Views** group to toggle between the document view options.

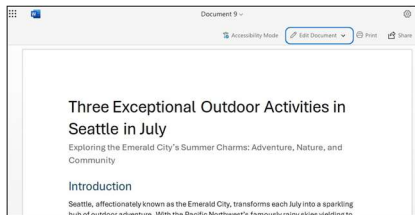


## Separate Pages

Separate Pages is the default view in Microsoft 365 (Web) and Online. This view is useful to check layout and spacing as the document is displayed as if it's printed on paper, and each page is clearly divided.

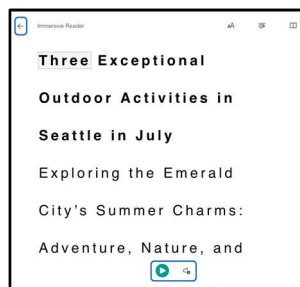
## Reading View

Hides the editing tools and displays the document in a clean, scrollable format. To edit this mode, select the **Edit document** drop-down arrow > **Edit**.



## Immersive Reader

A special mode that helps with focus and understanding as it allows for adjustments to text size, spacing, background color. Select the arrow in the top-left corner to exit this view. Use the **Play** button at the bottom of the screen to read the text aloud and the **Voice settings** icon to adjust voice settings.



**Learn Task**

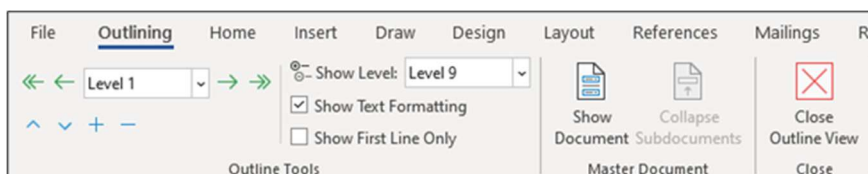
Access the Learner Workbook to complete the Learn Task for this skill.

## Manage Outline View

**Desktop Only Alert**

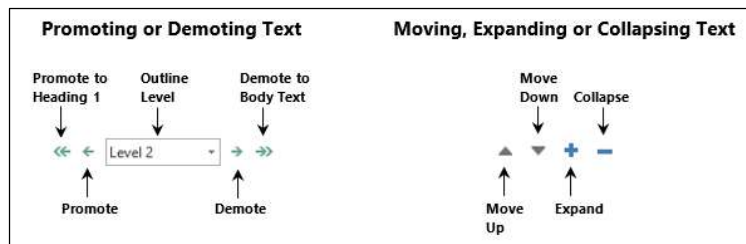
The following feature is exclusively available in the desktop version.

Outline numbering is useful when you need to define points and sub-points within a topic. Use the Outline view to access commands on the Outlining tab, in the Outline Tools group. To switch to this view, on the **View** tab > **Views** group > **Outline**.



Word now displays a new tab on the ribbon to help you set the levels for the text of your outline.





Each time you use Promote or Demote, the text moves forward or backward one level at a time.

- To promote the text to a higher level, select **Promote**
- To demote the text to a lower level, select **Demote**

Use **Expand** or **Collapse** to show more or less text for the outline.

- Double-click the **+** symbol to expand this line and display the text below this line
- Use the **-** symbol to collapse the levels
- The text between the **+** symbols can be referred to as a "family of text"
- Select **Move Up** or **Move Down** to move a family of text

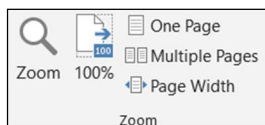
### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Zoom

The **Zoom** setting controls how much (or how little) of a document displays on the screen. To change the Zoom setting, choose one of the following methods:

- On the **View** tab > **Zoom** group, select the appropriate option

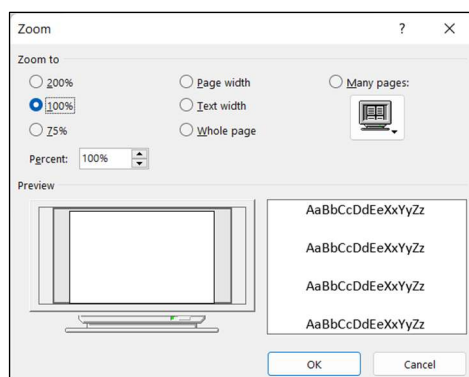


- Drag the Zoom slider or select the increment buttons on either side of the slider on the status bar



- Select the **100%** **Zoom level** button on the status bar

When you use the **Zoom** command in the **Zoom** group or select the **Zoom level** button on the status bar, the Zoom dialog box opens and presents you with further options.



**Hint:** You can also use the wheel on the mouse to zoom in or out of the document. Use the **CTRL** on the keyboard as you move the wheel up to increase the zoom or down to decrease the zoom.

The ability to enlarge the text display is useful when you are working with a small font size. Whereas the ability to reduce the display is useful when you are working with landscape orientation.

You can set the zoom percentage between 10% and 500%, or you can have Word automatically adjust the magnification so that you can view an entire page on the screen. When changing the view, the position of the insertion point will determine the zoom area.

Keep in mind that the zoom setting affects only the screen display. The amount of text that displays when you change the zoom percentage is determined by the size of your monitor. For example, if you have a 19" monitor or larger, you may view more of a document at 50% than someone who has a 17" monitor, but less than someone using a 21" monitor. Changing the magnification has no effect on the document printout.

### Learn Task

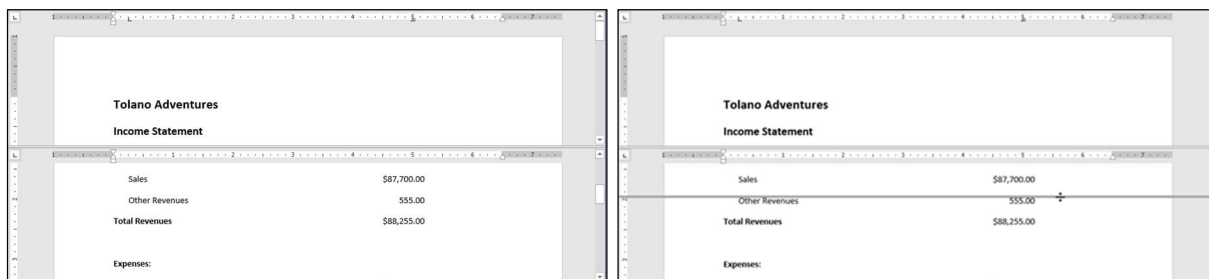
Access the Learner Workbook to complete the Learn Task for this skill.


## Split the Window

### Desktop Only Alert

The following feature is exclusively available in the desktop version.

By splitting a document window, you are displaying the same document in two different windows on the screen. This allows you to view two different areas of the same document at the same time. You can only split the window horizontally into two parts. To split the window, on the **View** tab > **Window** group > **Split**.



The cursor will change to display  when you point at the split bar. Select and drag the split bar to the required height for the top or bottom window.

You can change the view and scroll within each window independently.

- Select in the appropriate window to access that document section
- Drag the split bar up or down to display more or less of either document window

To remove the split pane, use one of the following methods:

- On the **View** tab > **Window** group > **Remove Split**
- Double-click the split bar between the windows

### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Show/Hide ¶

### Online App Alert

Steps for this topic differ in the Microsoft Apps version and appear after the desktop instructions. Certification focuses exclusively on the desktop features.

The **Show/Hide ¶** button allows you to show or hide non-printing characters, which can help you identify what you have inserted into the document. These characters appear only on the screen. They do not print. Some common non-printing characters include:

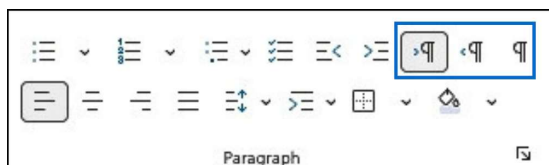
¶	Represents a hard return and is inserted every time you use the keyboard button ENTER.
→	Represents a tab and is inserted every time you use the keyboard button TAB.
·	Represents a space and is inserted every time you use the keyboard button SPACEBAR.
↵	Represents a soft return and is inserted every time you use the keyboard shortcut SHIFT+ENTER.
.....	Represents a <i>soft page break</i> (this code is inserted automatically when you enter enough text to fill a page); a soft page break is visible only in Draft view.
..... Page Break .....	Represents a <i>manual or hard page break</i> (manually insert this code when you want to end the page at the current location and move to the next page).

Postage → → Maryanne¶  
 Supplies → → Terry¶  
 ¶  
 Printer-Supplies → Alberto¶  
 ¶

Select the **Home** tab > **Paragraph** group > **Show/Hide ¶** to turn the feature on or off. When active, your text will display these characters for editing purposes. Displaying hidden characters is helpful when you need to adjust the layout of text because it allows you to view where an extra hard return or an extra tab may have been inserted.

### Microsoft 365 (Web) and Online

The Show/Hide ¶ options in Microsoft 365 (Web) and Online can be found at:



- **Home** tab > **Paragraph** group
  - Select the far-right button to toggle non-printing characters on and off
  - The left and center Show/Hide ¶ buttons toggle Left-to-Right text direction or Right-to-Left text direction

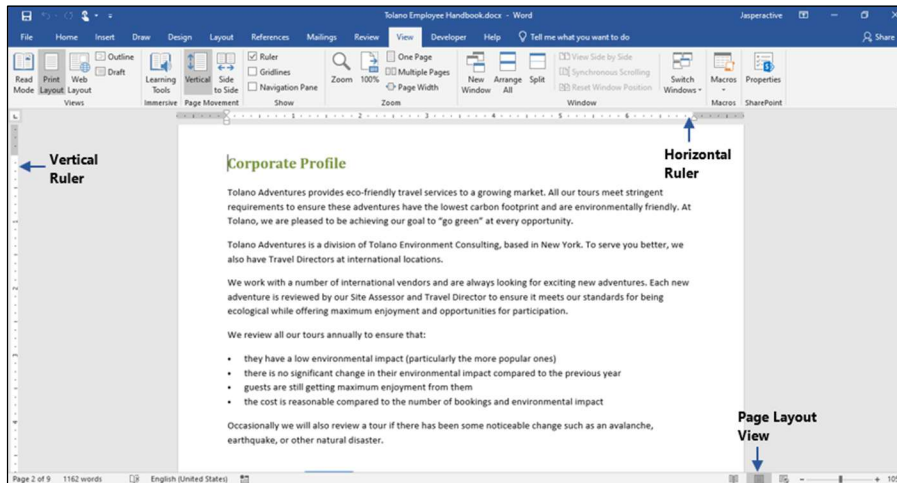
### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

## Ruler

The ruler in Word helps control and set the margins and indentations of paragraphs in a document. It can also line up images, charts, text etc. to make the document appear more uniform. Rulers help ensure your document appears the same on screen and when printing.

You can only view both horizontal and vertical rulers in the Print Layout view. To turn on (or off) the ruler, on the **View** tab > **Show** group > **Ruler**.



### Learn Task

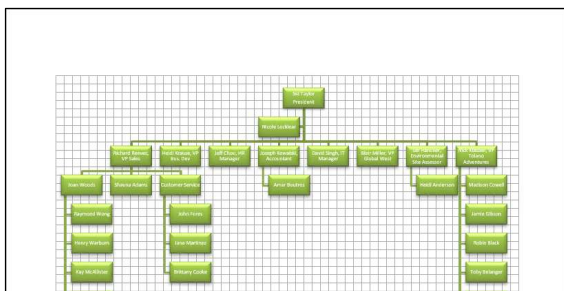
Access the Learner Workbook to complete the Learn Task for this skill.

## Gridlines

### Desktop Only Alert

The following feature is exclusively available in the desktop version.

**Gridlines** are helpful when you want to align items on the page, such as images, shapes, etc. To display gridlines on your page, on the **View** tab > **Show** group > **Gridlines**. You can then drag the shape or object to align with a gridline or position on the page.



### Learn Task

Access the Learner Workbook to complete the Learn Task for this skill.

### Assessments

Access the Learner Workbook to complete the Practice Exercise and Practice Questions.

### Unit Assessment

Access the Learner Workbook to complete the Objective Assessment and Create Project.

## Unit 1 Key Terms

Term	Definition
<b>.docx</b>	The file type associated with Microsoft Word 2007 and later and is automatically assigned to the end of a file name.
<b>Accessibility Checker</b>	A feature you can use to ensure that a document can be accessed globally on various devices for users with accessibility issues, such as visual or audio impairment.
<b>Backstage</b>	The view that appears when you select the File tab. It provides commands that deal with the entire file.
<b>Compatibility Checker</b>	A feature you can use to ensure that a document can be opened in older versions of Word or in a different format that may be required for another program.
<b>Contextual Tabs</b>	A hidden tab or menu that appears when objects, such as text, images, or other elements are selected.
<b>Dialog Box Launcher</b>	The button at the lower right of a Ribbon group that displays a dialog box or pane with more options for specific features.
<b>Document Inspector</b>	A feature you can use to check a document for items you may not want others to view if you share the document, such as personal information.
<b>File Formats</b>	The standard way that information is encoded in an electronic file. The file format is indicated by the file name extension.
<b>Go To Feature</b>	A quick method of jumping to a specific page.
<b>Gridlines</b>	A feature to help align items on a page such as images and shapes.
<b>Navigation Pane</b>	When active, a pane appears on the screen to help you search for text and displays the results by headings, pages, or a list of the results in the document.
<b>Page Orientation</b>	The direction of the paper for text flow. Portrait uses the length of the paper vertically. Landscape uses the length of the paper horizontally.
<b>PDF</b>	A file format used to maintain the design layout and format of a file for distribution to others, restrict the editing of file contents, or to make a file smaller so it can be set up as a link on a website for downloading.
<b>Quick Access Toolbar</b>	Contains popular commands such as Save, Undo, and Redo. This toolbar can be customized for those commands you use frequently.
<b>Ribbon</b>	A collection of tabs located directly below the title bar, which provides quick access to commands required to complete a task.
<b>Ribbon Groups</b>	The groupings on each ribbon tab containing commands for specific tasks.
<b>Ribbon Tabs</b>	A collection of command buttons organized into logical groups that relate to a type of activity.
<b>Save</b>	The command used to store a document.