

 Office Doc



# MS-OFFICE 2016 - WORD

*English version*

Long documents

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# **STANDARD COMMANDS**

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# 1 Styles

## 1.1 What is a style

As soon as a certain type of formatting is frequently used, you should create a "style". A style is a name that you give to a paragraph or character format. Once created, all you need is to apply the style to the required paragraph(s) or string of characters.

If you have applied the style several times and you wish to make a few modifications, you need not modify each occurrence separately. You simply change the settings for the given format and the modifications will be automatically applied to all occurrences.

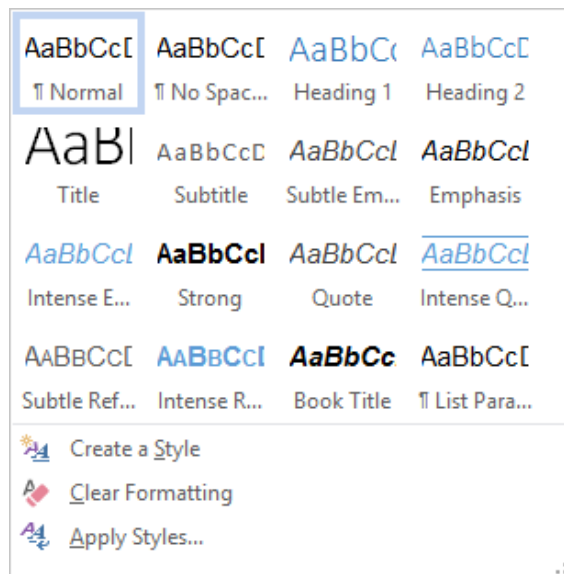
Word comes with a wide range of pre-set styles such as the header or footer style, the heading 1, 2, 3 ..... styles (to format a chapter title, sub-chapter title etc...). The user can also create his own styles.

## 1.2 Applying a style

### 1.2.1 Using the styles gallery

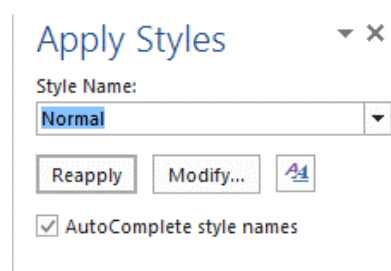
Place the cursor in the required paragraph or select it completely


- HOME Tab – STYLES Group



### 1.2.2 By typing the name of the style

- Click on the APPLY STYLES option at the bottom of the styles gallery :



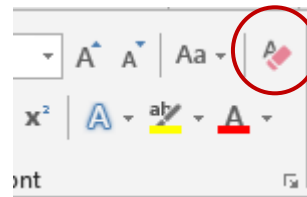
- Simply start typing the name of the style (here h) and the list automatically displays the first style starting with the typed letter(s). Provided the *AutoComplete style names* option has not been ticked off). You may also scroll down the drop-down list.
  - Click on the APPLY button.
-  The MODIFY button displays the *Modify Style* dialog box (explained later) and the AA button displays the *Styles Pane* (also explained later).


### 1.3 Clearing formatting (style or direct format)

- Place the cursor in the paragraph or select it completely
- Click on the CLEAR FORMATTING option at the bottom of the styles gallery.

Or

- *CLEAR FORMATTING* Option  
(HOME Tab – FONT Group)




-  It is equivalent to the CTRL + MAJ + N keyboard shortcut that reverts to the *Normal* style. Or the CTRL + Q keyboard combination (to clear the format of a paragraph) combined with CTRL + space bar on select characters (to clear the format of a string of characters).

### 1.4 Saving a paragraph style as a custom style

A **paragraph** that you often use can become a style :

- Format a paragraph according to your needs and select it
- Display the styles gallery
- Click on the SAVE SELECTION AS A NEW QUICK STYLE option
- Give a name to your style and validate

-  Something a little bit « heavy » : when you press the ENTER key to create a new paragraph, the new paragraph remains in the same style. Apply the *Normal* style to the new paragraph if you wish to make it « free ».

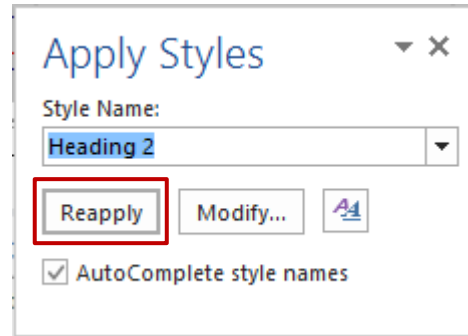
### 1.5 Resetting the original format after having applied a direct format

You have manually applied several paragraph or character format attributes to a paragraph set in an X style and you wish to revert to the style source definition.

- Display the styles gallery
- Click on the APPLY STYLES option at the bottom of the gallery

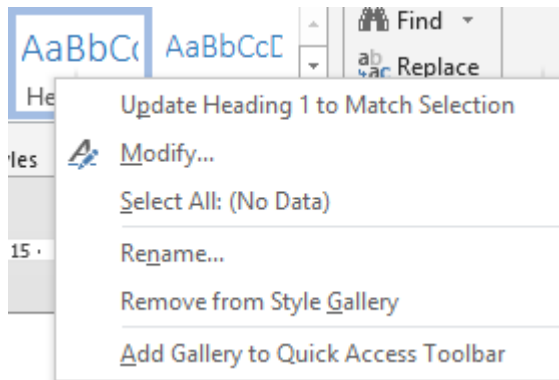
- The APPLY button shows now REAPPLY

If your selection corresponds to a paragraph, then Word applies all the style's attributes. If your selection corresponds to a string of characters, then Word only applies the *character* attributes.



**1.6 Managing a style (custom or built-in) : modify, rename ...**

- Display the styles gallery
- Right click on the paragraph or character styles (a custom or built-in style)



<b>Update ...</b>	Handy to update the style after “direct” changes. Applies to paragraph and character styles.
<b>Modify</b>	Explained in details after this table
<b>Select ...</b>	Global selection
<b>Rename</b>	It is not advisable to rename the built-in Heading 1, 2 ... or TOC 1, 2 ... styles.  What you can modify with no consequences : <i>Heading 1 ;company's name. It is most important that the style begins with its default name.</i>  On the other hand, you are free to rename custom styles as needed.
<b>Remove from Quick ...</b>	<u>The style remains defined and available</u> but it is removed from the Styles gallery
<b>Add Gallery ...</b>	☛ Caution : you add the <i>gallery</i> to the QUICK ACCESS (by default : top left – next to the OFFICE button)

## Modifying the style

Modify Style

Properties

Name:

Style type:

Style based on:

Style for following paragraph:

Formatting

Calibri Light (Headings) 16 B I U

Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph

Fsf sf

Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph

Font: (Default) +Headings (Calibri Light), 16 pt, Font color: Accent 1, Space  
Before: 12 pt  
After: 0 pt, Keep with next, Keep lines together, Level 1, Style: Linked, Show in the Styles gallery, Priority: 10  
Based on: Normal

Add to the Styles gallery  Automatically update  
 Only in this document  New documents based on this template

Format OK Cancel

Various buttons for a quick access to the font, size, color, text alignment ... options.

At the bottom of the box, the FORMAT button will give access to all possible modifications : FONT, PARAGRAPH, TABS, BORDER, LANGUAGE ...

### Special :

#### **Add to Quick Style list**

On by default.  
the style will be displayed in the styles gallery

#### **Automatically update**

The option is only available for paragraph styles :  
any direct modification will be considered as a style change and applied to all its occurrences.

#### **Only in this document**

By default, a change in a style only applies to the current document.

#### **New documents based on this template**

Any document based on a given template. If you did not use a custom template, it will be the Word global template *Normal.dotm*

To turn this option on means that the changes will be applied directly into the source template to which your current document is attached.

Caution : as long as you do not exit Word, the changes are « temporary ». Final saving will only occur when you exit Word. If the changes are applied to a template other than *Normal.dotm*, you will be prompted to confirm the saving.

## 1.7 The Styles Pane

The Styles Pane gives access to the same options that have been explained above but also some interesting additional options.

### 1.7.1 General options


Click on the dialog box launcher located under the CHANGE STYLES button to display the Pane

*By default : SHOW PREVIEW is not on and the styles pane is floating (double-click on its title bar to dock it)*

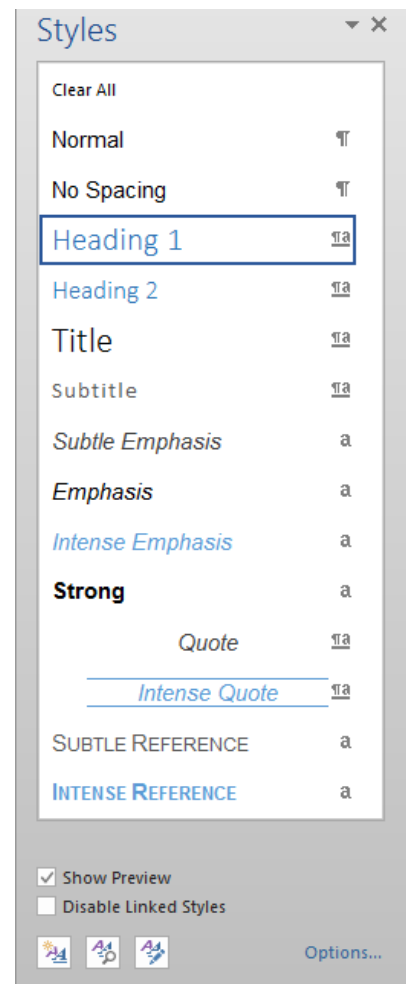
The Pane displays several *sorts of styles*

- ¶ Paragraph style
- a Character style
- ¶a *Linked style* because it is both a paragraph and a character style.

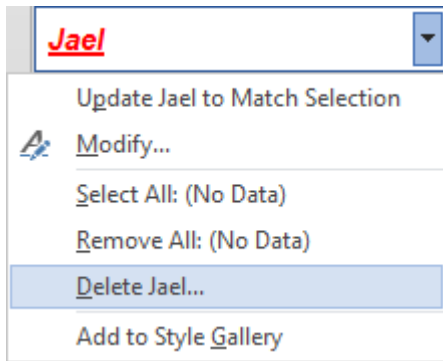
When you point a style, a tooltip displays some information about the style : the *Font, Paragraph, Style settings*.

 The number of styles listed in the Pane depend on the choice set through the OPTIONS dialog box (valid for THIS document only) : *All styles, In use ...*

Users of previous versions : table styles are no longer listed in the Styles Pane. They can only be modified in the *Table Styles Gallery* (when your cursor is placed inside a table)



Click on the triangle located at the right-end of the style name and the drop-down menu is the same as the one you get when you right-click a style in the Styles gallery.



Two additional interesting options : CLEAR ... and DELETE

### DELETE XXX

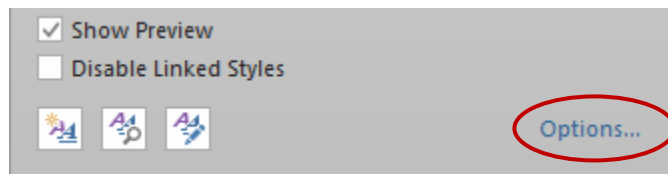
\* This option is unavailable for preset styles

You will be prompted to confirm.

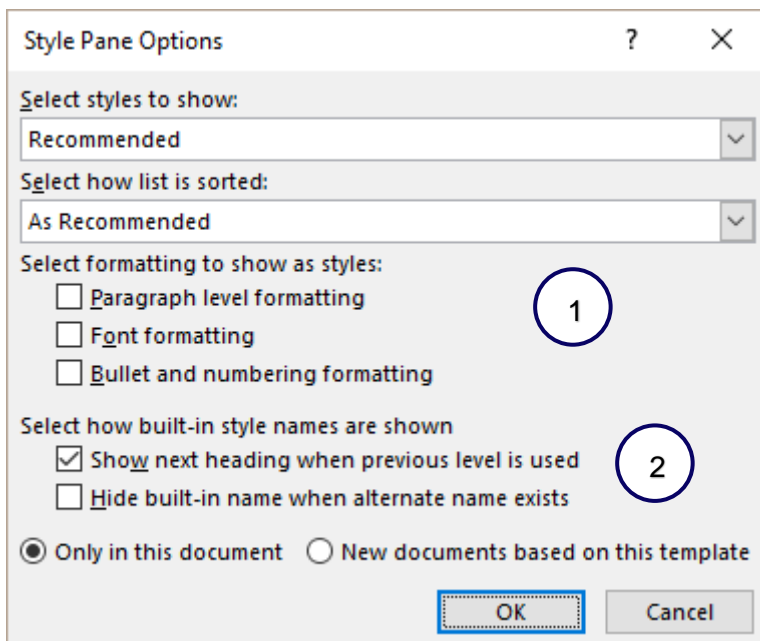
The style is deleted (caution, not only from the styles gallery) but as for the previous option, direct character or paragraph formatting (color, bold, italic, center, justified, border ...) will remain.

### 1.7.2 Showing formatting, showing the next heading when the previous level is used

It is the following option :



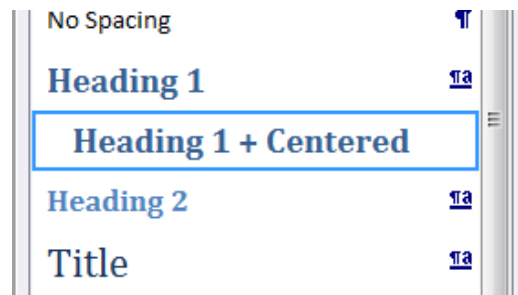
Here below the dialog box (what will be turned on or off is only valid for THIS document)



1

If these options are checked, it means that all "direct" formatting will be displayed.

Here after an example :



The first *Heading 1* = the original style, which is confirmed by the style icon at its right end.

The second *Heading 1 + Centered* ... is just an information, that « somewhere » in the document, direct centering has been applied. There is no style icon at its right end.

Purpose : security. Make you more aware that the occurrences of *Heading 1* are not all identical.

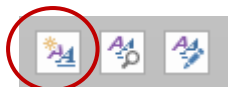
Change ? ALWAYS THE STYLE AND **NEVER** THE FORMATTING

2

When you apply the *Heading 2* style to a paragraph, the styles gallery automatically displays the next *Heading 3* style.

Advice : keep it on

### 1.7.3 More advanced options : new style, style inspector, managing styles



#### *New Style*

To create a style by selecting the various settings in the dialog boxes. Mainly used to create a character style because contrary to a paragraph style, it is not possible to create a character style by starting from an already formatted text.

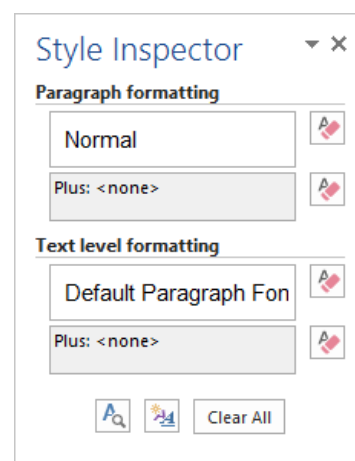
In the case of a paragraph already in the required format, this NEW STYLE dialog box will automatically retrieve all the direct attributes and all you will have to do is give your new style a name.

 To create a paragraph style by starting from an already formatted text, it is comfortable to display the Styles Gallery and click on the SAVE SELECTION AS A NEW QUICK STYLE option.



#### *Style Inspector* :

Indicates the two main formatting attributes of the current style :



The eraser buttons located to the right will remove the format attributes in steps, making a difference between the style and the direct formatting : Reset to Normal Paragraph Style, Clear Paragraph Formatting, Clear Character Style, Clear Character Formatting.

The CLEAR ALL button : back to the NORMAL style.

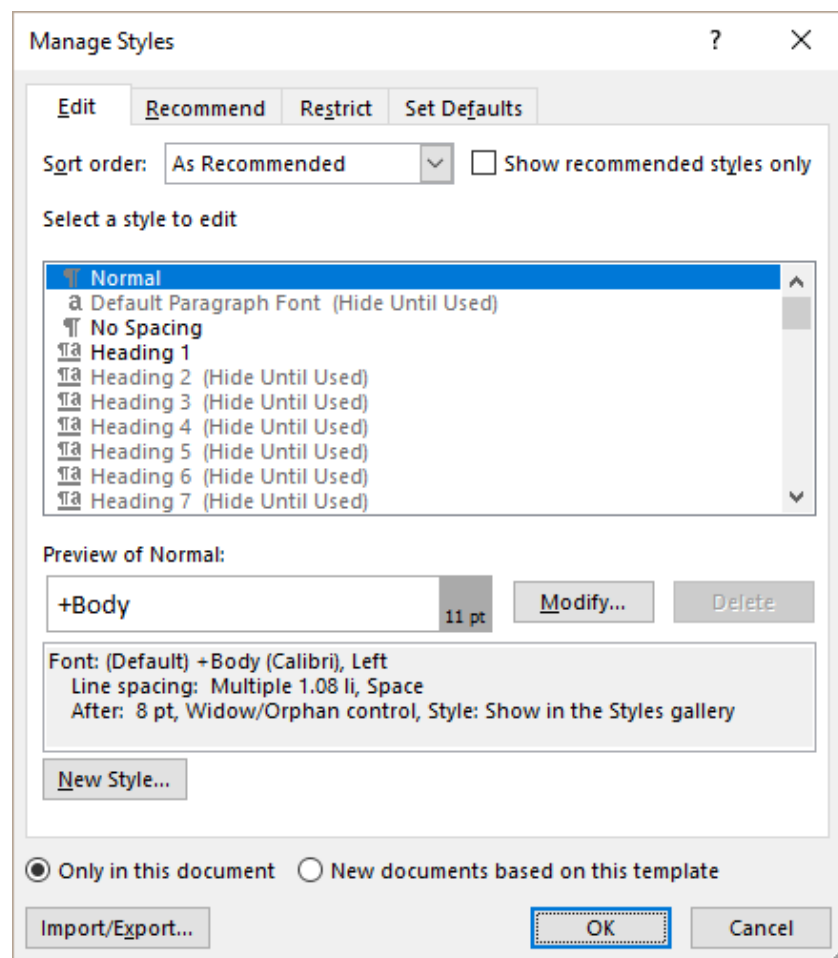
The first button, at the bottom of the *Style Inspector* dialog box will display a second pane with interesting options : list of all the style and formatting attributes, possibility to compare the format to another selection and so on.

(faster shortcut : SHIFT + F1)

The second button opens the *New Style* dialog box.



### Manage Styles



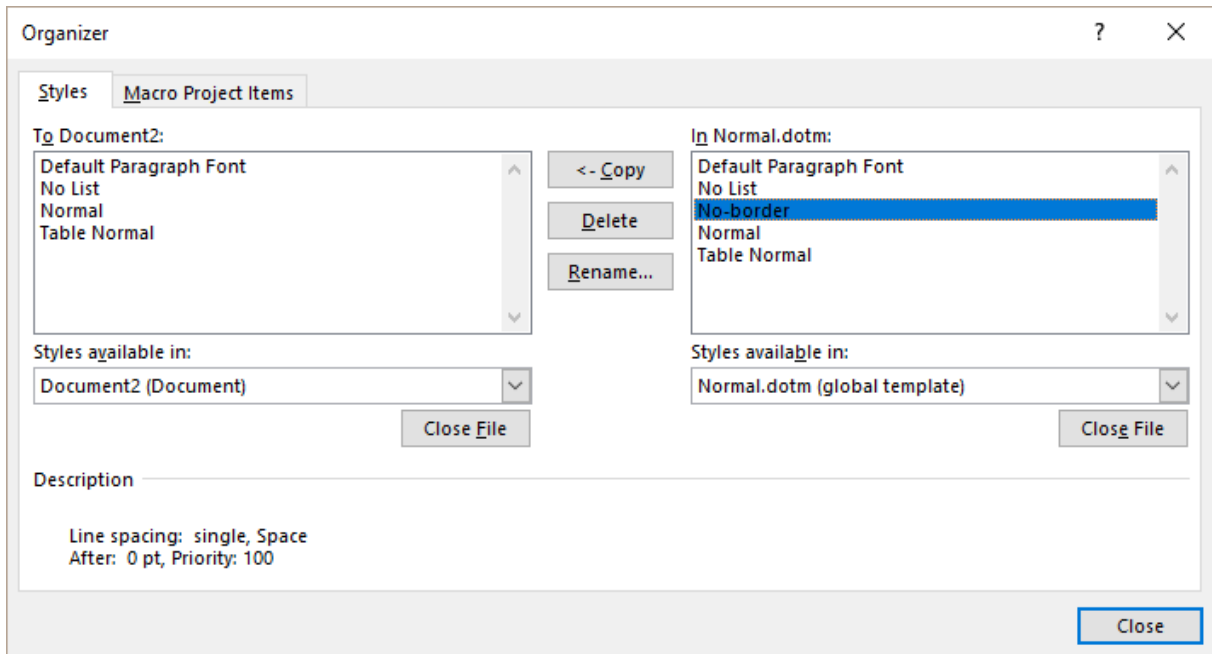
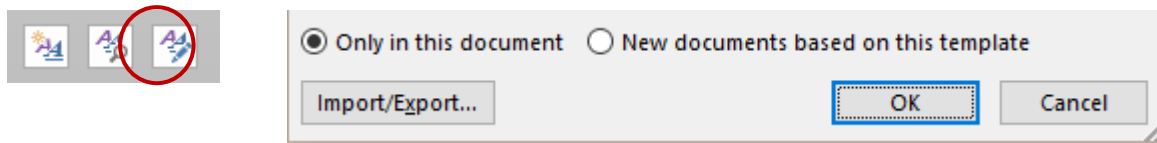
A dialog box with several tabs and lots of options.

Some are very standard such as : *deleting a style, creating a new style, modifying a style* (why then come here ? all styles are listed, even table styles)

Some others are special or quite advanced such as : *should the style be hidden until it is used ? Changing the order of the styles in the list, importing/exporting styles and macros between documents or templates and so on.*



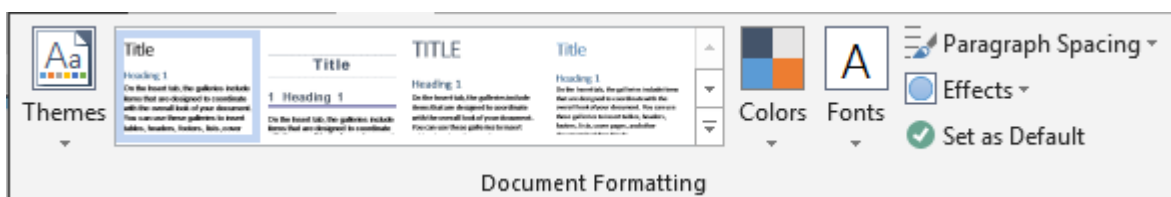
### 1.7.1 Importing / Exporting from another document



Selection : usual Windows techniques : CTRL and MAJ

When you click on CLOSE FILE, the button is automatically renamed OPEN FILE. A dialog box like OPEN will be displayed. But caution : by default Word searches for templates (.DOT - .DOTX). If you need to import styles from a standard document, set on *All files*.

## 1.8 DESIGN Tab – DOCUMENT FORMATTING Group



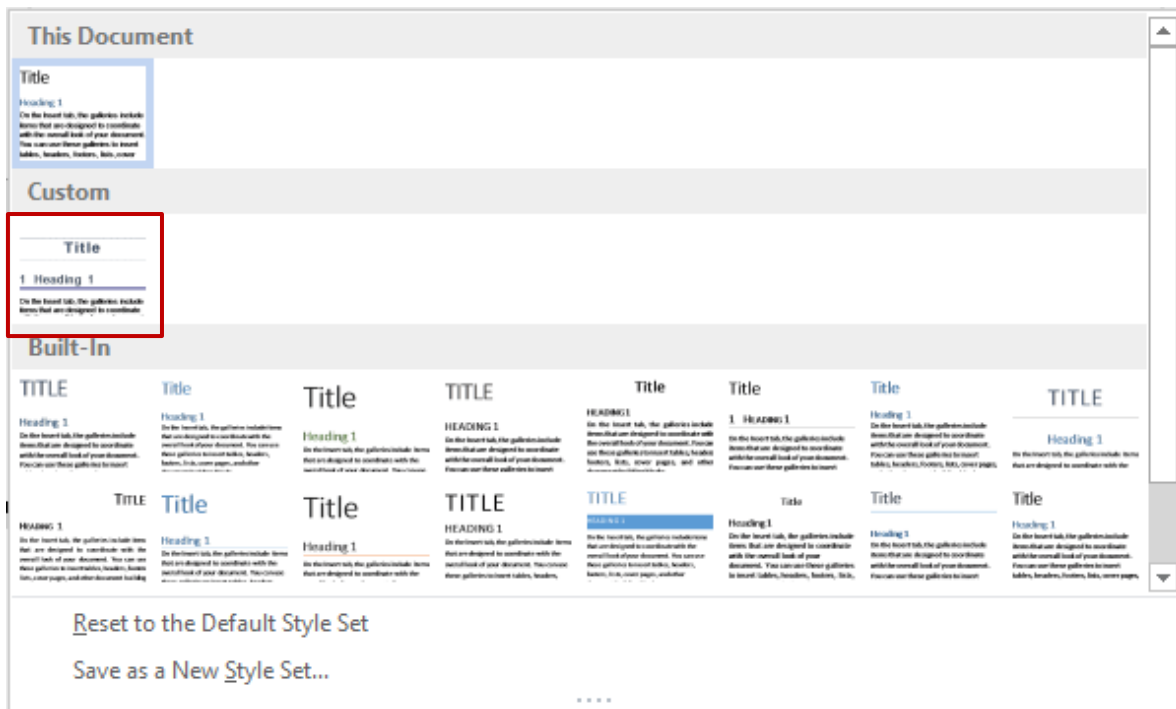
### 1.8.1 Themes

**Changing the theme** implies that all colors and fonts will automatically follow the new theme. Unless you have chosen « non-theme » colors. In the case, they will remain unmodified.

The COLORS and FONTS and EFFECTS buttons – linked to the theme – are located at the right of the styles gallery

## 1.8.2 Styles sets

The gallery displays various *styles sets* : characters and paragraph formatting for the Heading 1 – 2- 3 ... styles – always in the colors of the active theme.



*Interesting* : **SAVE AS A NEW STYLE SET** : all your Heading 1 – 2- 3 ... styles as well as custom settings can be turned into a *style set* that you can use in any new document. This is what has been done for the style set circled in red.

With no style set created, you must go through the ORGANIZER dialog box and import the styles one by one ... longer ...

*Note* : behind the style set there is a .dotx template, stored in the QUICKSTYLES folder – a subfolder of your profile in AppData / Roaming etc ...

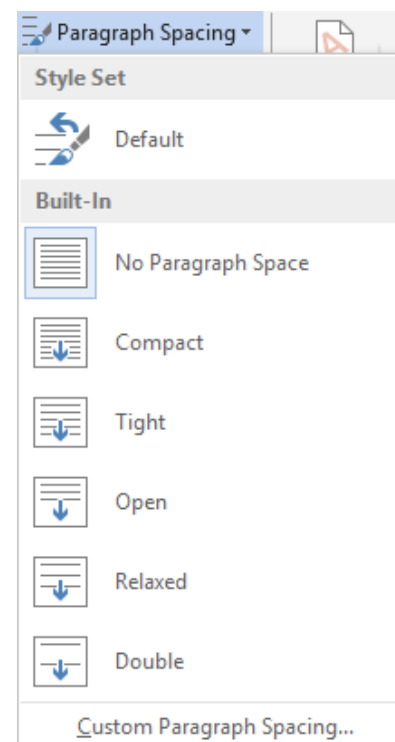
## 1.8.3 PARAGRAPH SPACING Button

### Various preset possibilities

To set the spacing before and after for all the document paragraphs defined in NORMAL style.

### Custom Paragraph Spacing

Access to a dialog box for additional settings such as alignment, indent ... that will be applied to all Heading 1-2-3 and Normal styles)



#### 1.8.4 SET AS DEFAULT Option

To set the theme (colors, fonts and effects), the document styles and the paragraph spacing as default settings for *new* documents.

This means that the command impacts – even though you are not told about it – the Word default template NORMAL.DOTM

#### 1.9 Tip : styles and spacing before/after

The XXX style is exceptionally used several times consecutively, with no typing between the occurrences. The style is defined with a spacing before (18 pt) and after (12 pt).

Example :

**1) Text 1**

**2) Text 2**

**3) Text 3**

You do not really like this spacing but you do not want to change your style. Word 2013 offers an interesting option :

- Ordered locally : select the paragraph for which this spacing before and after should momentarily be ignored and turn on the following option :  
HOME Tab – PARAGRAPH Group – Dialog box launcher – DON'T ADD SPACE BETWEEN PARAGRAPHS OF THE SAME STYLE Option
- Changing the style : HOME Tab – STYLES Group – Dialog box launcher to display the Styles Pane – MODIFY STYLE – FORMAT Button – PARAGRAPH Option - DON'T ADD SPACE BETWEEN PARAGRAPHS OF THE SAME STYLE Option

Here after the result

**1) Text 1**

**2) Text 2**

**3) Text 3**

## 2 Numbering the titles

---

Here after a document with some headings :

▪ **Heading-1**

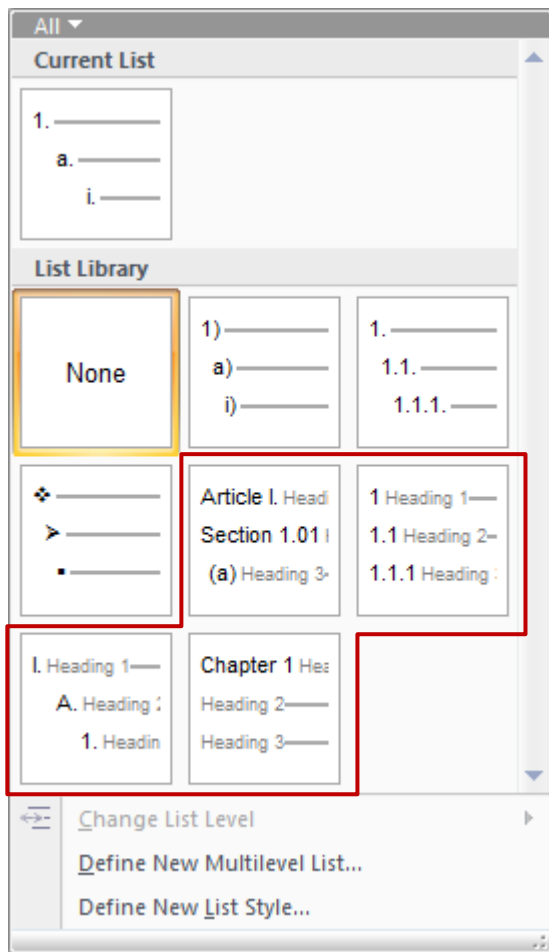
▪ **Heading-2**

▪ **Heading-3**



- HOME Tab - MULTILEVEL LIST Button

## 2.1 Applying a numbering type



**Caution :** only choose from the lists indicating Heading 1, 2 ... in grey shade

The others are used to apply a hierarchy to a portion of text, without using styles.

- Click on the nearest type and apply it. Here below the result on our test document (we have applied a “standard” type (1 – 1.1 – 1.1.1 ..) :

▪ 1 → Heading 1 ¶  
 ▪ 1.1 → Heading 2 ¶  
 ▪ 1.1.1 → Heading 3 ¶  
 ¶

For most types, it is predictable that the paragraph settings will not meet your requirements (in the above example, the indent is set at 0.76cm. Not very handy. 0.75cm would have been better).

**Important** : numbering is part of the style attributes as soon as you run the numbering command. The preset or custom indents applied to Heading 1, 2, 3 ... styles will be automatically modified when numbering is applied.

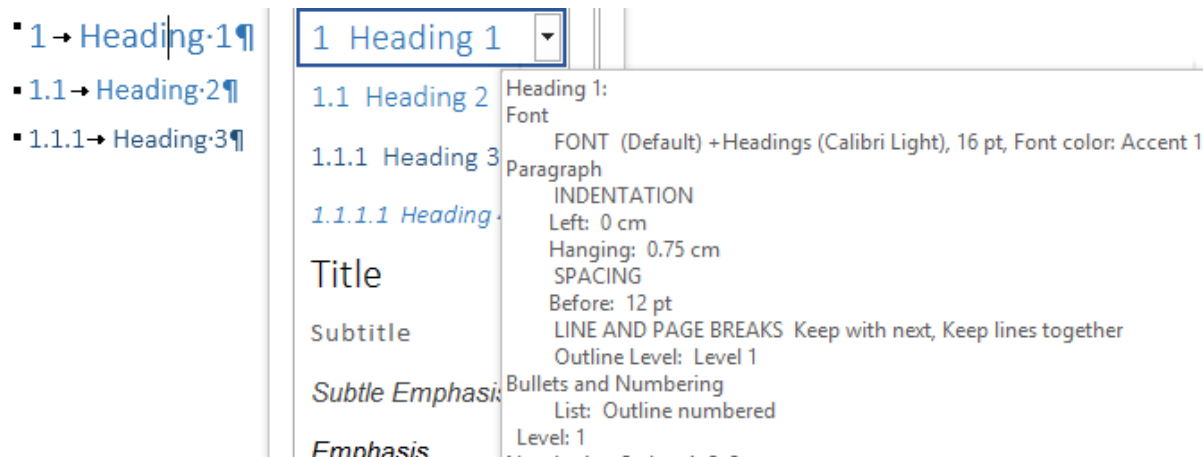
## 2.2 Customizing the list

- Click in one occurrence of the highest level (usually Heading 1)
- DEFINE NEW MULTILEVEL LIST

*The type that is displayed and that you can customize is the one you have applied. That is why it was important to choose the nearest one*

Change the number or the bullet, set your indents and alignments by level or globally through the SET FOR ALL LEVELS button and decide whether you need a tab with a hanging indent.

Here below our test document : level 1 = 0.75cm / level 2=1cm / level 3=1.25cm etc ...):

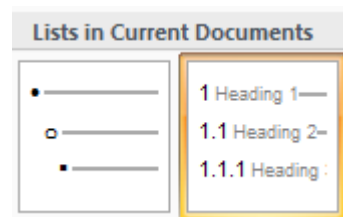


## 2.3 Saving the modifications

For Word there is a *new list* if you have modified *numbering* (changing the number, adding or removing a parenthesis, changing a parenthesis for a dot and so on, even if only it has been done for level 9).

Such a change of numbering will make sure that the new list will be listed in the gallery under the category *Lists in Current Documents*

(here the change is really minor . a dot has been added to level 9 – off the capture). But it is sufficient



These new lists are available as long as you do not exit Word. When Word is closed and opened again they will no longer be listed, unless you open the document into which they have been used.

### Save in the Library

If you wish to keep one of those lists, right click it and select the option SAVE IN GALLERY (it will remain active for a next Word session because it is saved in Word although not in Normal.dotm).

*If the only modifications are with indents, Word does not consider that a new list has been created. Right clicking will show the save option but it will have NO EFFECT.*

*Solution : as we did, a minor modification at level 9 ...*

The Library lists cannot be directly modified. You remove it (right click), you modify it and then you re-save it (right click).

### Save in the active document or a template

If you need to save a list in the active document or a given template, choose the second option DEFINE NEW LIST STYLE. Same process and steps and the lists will be displayed in the *List Styles* section. A style is created, which does not appear in the Styles Pane but can be managed in the extensive list of styles displayed by the MANAGE STYLES button at the bottom of the Styles Pane

## 2.4 Numbering as one of the style attributes

When you *modify* the style through – reminder :

- Cursor in a paragraph set as Heading 1
- Style dialog box launcher (just below the MODIFY STYLES button)
- From the style drop-down list : Option MODIFY then the FORMAT button

The NUMBERING option is displayed after the usual FONT, PARAGRAPH ... options and will offer several numbering types

Caution : this option MUST NOT BE COMBINED with numbering the *titles*.

This command will let you create custom styles with a hierarchy independent from the Heading 1, 2, 3 .. styles but freely chosen and applied by yourself.

Such as in the following example :

```
1. → AMX-1¶
¶
500-1. → AMX-2¶
Pellentesque-habitant-morbitristique-sene
Proin-pharetra-nonummy-pede¶
500-2. → AMX-2¶
Lorem-ipsu-m-dolor-sit-amet,-consectetuer-
Fusce-posuere,-magnased-pulvinar-ultrices
magna-eros-quis-urna¶
¶
a. → AMX-3¶
Nunc-viverra-imperdiet-enim-Fusi
```

*Then you will certainly have to adjust the style indents.*

## 2.5 How to restart numbering at 1 – How to retrieve a missing number – How to remove the numbering

### Restart at 1

- Right click on the number in question
- Option RESTART AT 1

*Or try*

- Click in the title to re-number
- Click on the standard numbered list button (on its triangle to display the drop-down list)
- Option SET NUMBER VALUE

### Missing number

You copied-paste a portion of text including headings and the numbers are missing  
Usually it is sufficient to apply the following keyboard shortcut on all affected headings :  
CTRL + Q

### Removing the numbering

No global command. The NONE button in the *Multilevel List* only affects the active occurrence of the style. Possible solution but title by title : the option explained in the previous topic – but not advisable for a new number or to modify an existing one – but perfect to remove the numbering : MODIFY the style – FORMAT Button – NUMBERING Option – NONE Option).

## 3 The outline view

The **OUTLINE VIEW** is used to easily format and quickly organize the elements of a long document by :

*Visualizing its structure.*

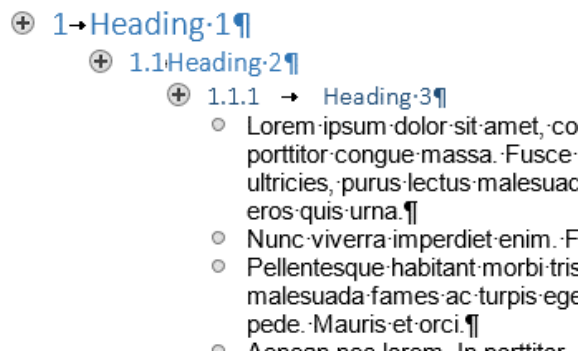
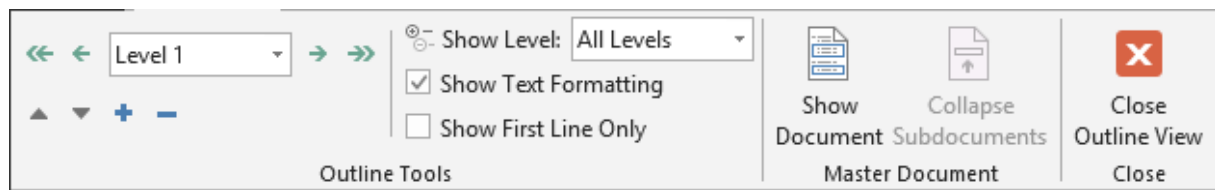
*Moving the chapters and their contents with no risk of text loss.*

The document structure is created through a "level hierarchy" : level 1 = chapter 1, level 2 = sub-chapter and so on.

- ☛ **The levels are created by applying the « Heading » built-in styles** : Heading 1 = level 1, Heading 2 = level 2 ...

### 3.1 Working with the outline view

- VIEW Tab – OUTLINE Button
- An additional tab specific to the Outline view is displayed
- The first group - OUTLINE TOOLS – contains all commands related to the Outline view.



#### Note

The ruler is automatically hidden, as well as any picture inserted in the document (their location is left empty as shown in the screen capture below)


The levels are marked with the following symbols :

- ⊕ Titre comportant des sous-titres
- ⊖ Titre ne comportant pas de sous-titres
- □ Corps de texte

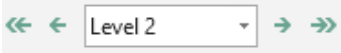
#### 3.1.1 Selection

Select a level with its sub-levels and body text	Click on ⊕
Select the body text	Click on ○
Select one level only	Limit the selection to the characters

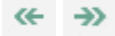


<b>Expand or collapse a level</b>	Double-click on 
-----------------------------------	---

**3.1.2 The buttons of the OUTLINING Group**



Promote/Demote one level or choose directly the required level from the drop-down list.




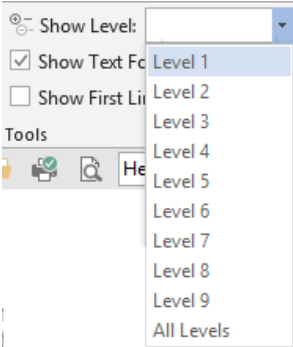
Promote to the highest level (Heading 1) or demote to body text.



Move the selected level in the arrow direction.  
*Make sure the corresponding body text is hidden.*



Expand/Collapse the selected level.  
You can also double-click on the symbol 



Expand/Collapse the outline structure to the required level

The two SHOW ... commands

To display the format or not  
To display the beginning of the body text

The other buttons

They are related to master documents


How is a collapsed level displayed

A light line below the text of the given level indicates that the rest is hidden.

Move a level using the mouse

Point the symbol  then drag up or down.

Demote or promote one level using the mouse

Point the symbol  then drag left or right.  
Caution : no undo (Ctrl + Z for instance) for this operation

Levels and styles

Before a level is applied, the paragraph is set as « Body text » and the corresponding style is « Normal ». When a level is applied, Word applies the « Heading » style corresponding to the level and any manual formatting is removed.

### 3.2 Printing the outline

Change if necessary the number of levels shown and print the document as usual. Word will only print the levels displayed in the outline view.

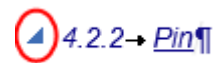
- ✎ Recent test : Word printed the outline but also the table of contents (still in outline view) as well as an extra blank page. ?? . Another test : no blank page but text was all garbled ??
- ⚠ Caution, a Print Preview still shows the document completely !

## 4 Collapsing / Expanding portions of text (without using OUTLINE mode)

**Important** : collapsing / expanding is only available if you have applied hierarchy styles (Heading 1, 2, 3 ...) to your paragraph.

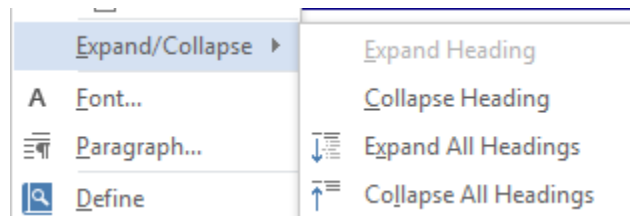
### 4.1 Collapsing / Expanding / a title

Once you have applied the required style to the paragraph, a triangle will be displayed at its left side when you mouse over it. Click the triangle to collapse the sub-titles and the related text below.



### 4.2 Collapsing / Expanding all titles

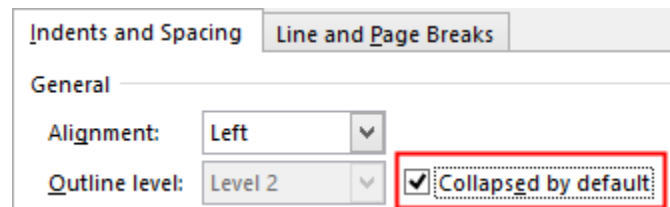
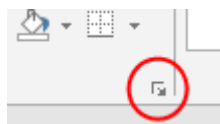
Right click a title and :



### 4.3 Set that the title must remain collapsed when opening the document

When you close and open the document again, all titles are expanded (default setting). You may need that a given title remains collapsed :

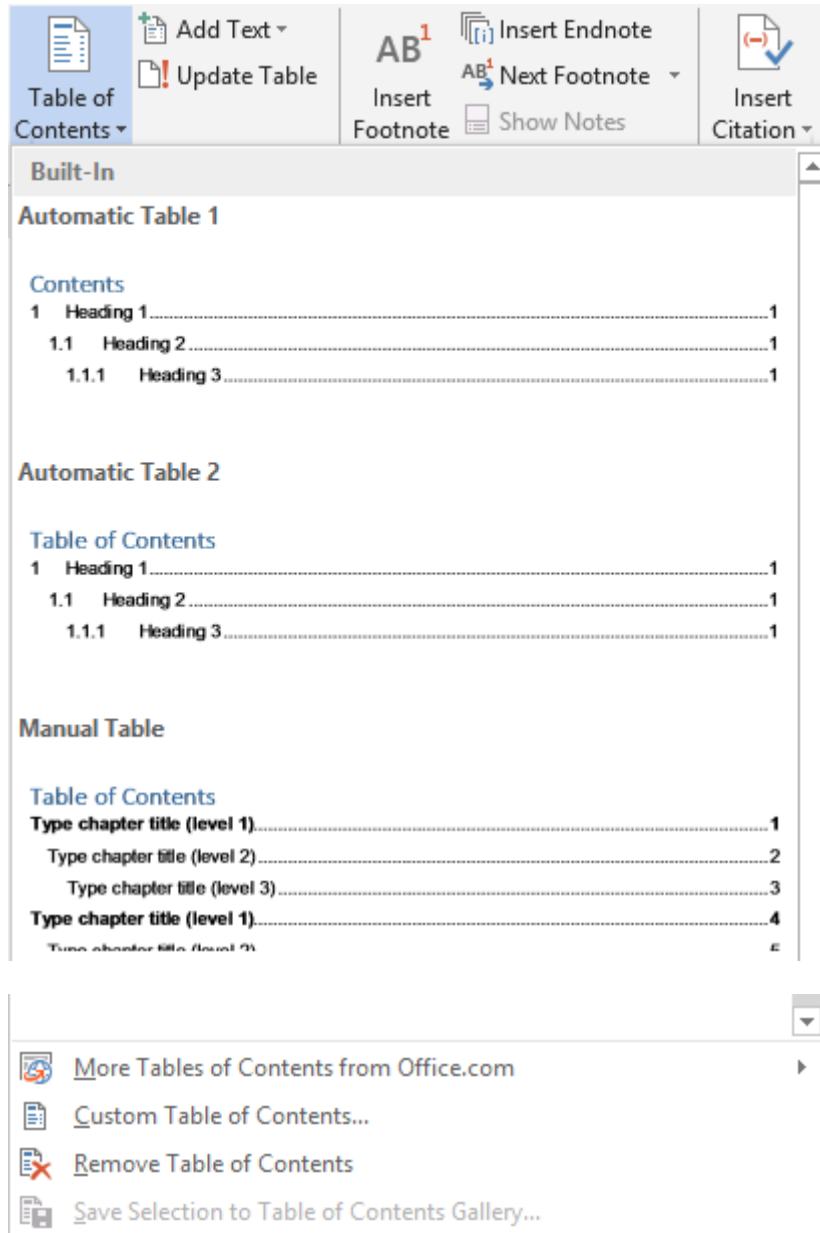
In the PARAGRAPH dialog box :



## 5 Inserting a table of contents

### 5.1 The gallery of built-in tables of contents

- Place the insertion point where you wish to insert a table of contents.
- REFERENCES Tab – TABLE OF CONTENTS Group - TABLE OF CONTENTS Button



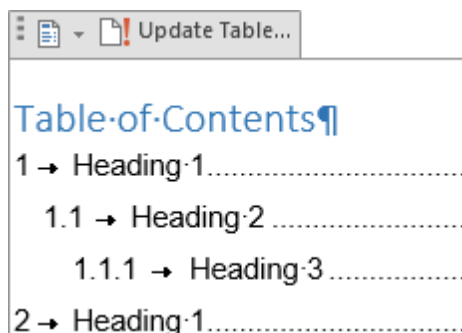
Choose one of the three preset styles

 Manual Table : caution before choosing this type.

If you have created the document hierarchy by applying « Heading » styles, it is totally usual to proceed manually. This type of table has sense only if there is NO hierarchy.

Both types generate a table of contents inside a content control. Simply click inside the table to display the control.

The content control shows two buttons. *The first one* to display the tables gallery or to delete the table of contents. *The second one* to update the table (only the page numbers or the whole table)



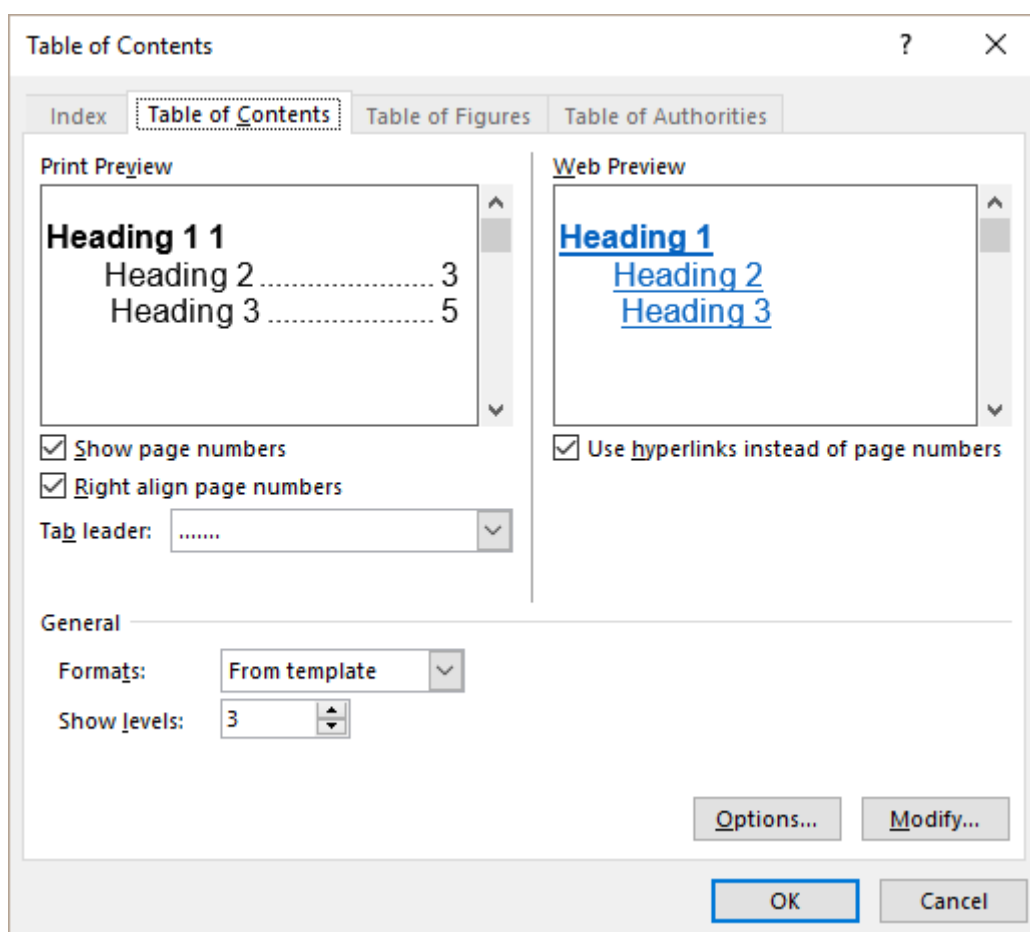
Update Table...

Table of Contents

- 1 → Heading 1.....
- 1.1 → Heading 2.....
- 1.1.1 → Heading 3.....
- 2 → Heading 1.....

## 5.2 Inserting a custom table

- At the bottom of the tables gallery : INSERT TABLE OF CONTENTS

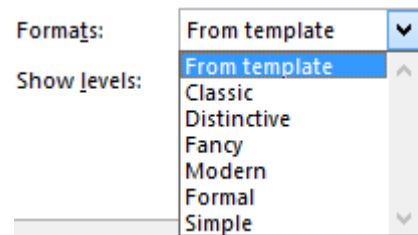


*Do you wish to show the page numbers, right aligned ? A classical option.*

*Use hyperlinks ... : for onscreen reading. A hyperlink is created for each title (easier to navigate).*


### 5.2.1 Choosing the format : applying various TOC styles

In the previous dialog box, choose a format other than *From template*.



### 5.2.2 Choosing the format : From template

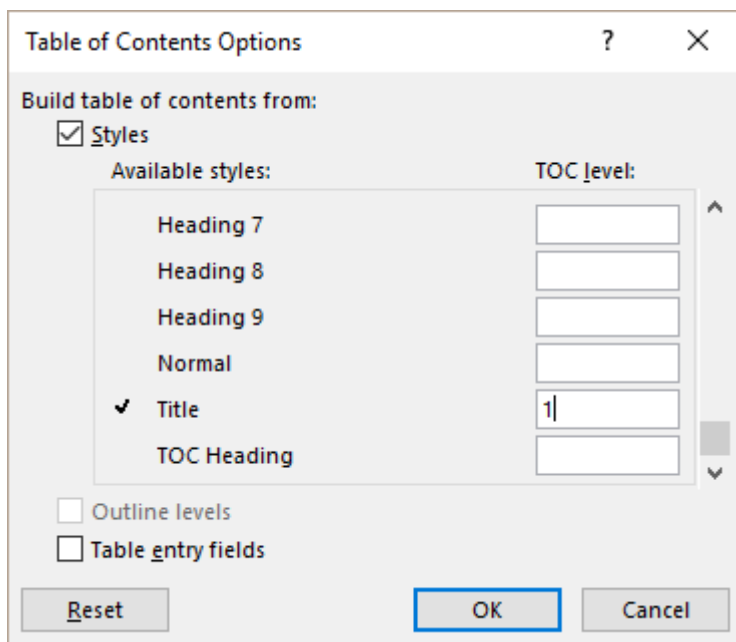
The chosen format applies the “Toc” styles found in the template attached to the document. If it is a standard document, the template will be Normal.dotm

 If you wish to modify the definition of the template Headings, then click on MODIFY. Only affect THIS document and not the template itself. This can also be done once the table has been generated.

### 5.2.3 Adding a custom style to the table of contents

A classical case : your chapters are introduced by a « section » title. You have applied the built-in *Title* style or a *custom* style. **Now you need to tell Word that this style should be included in the table of contents.**

Click on the OPTIONS button :



The Heading 1,2,3... styles are automatically defined as level 1, 2,3 ... in the table of contents. If necessary scroll down the list and set your own order (shift the levels if required).

(here, the extra style is *Title* and will correspond to level 1)

 The outline view only recognizes the levels set through « Heading » styles and will therefore ignore a style such as Title or any other custom style that you consider as a « level ». To force the outline view to display such a style, please follow the steps explained at topic *Outline view on page 31*

## 5.3 Important comments about generating table of contents

### 5.3.1 Small Caps or Capital Letters ?

When Word creates the table, it *reads **what you have typed*** for each Heading 1, 2, 3 ... paragraph. If the style includes the *All Caps* attribute, the text is in capital letters, whatever your actual typing ... which will be retrieved in the table of contents ! Consequently either add the all caps attribute to the TOC style or properly re-type the Heading 1, 2, 3 ... text ...

### 5.3.2 The table is a field code

Simply click inside the table and the field code shading will be applied. If you have chosen for one of the first two built-in types, the field code is inside the content control. If you have inserted a custom table, there is no control, only the TOC field.

Syntax of the table of contents field : {TOC \o "1-3"}.

To toggle the field codes : select the whole table and SHIFT + F9 or display the shortcut menu and click on the TOGGLE FIELD CODES option.

### 5.3.3 The formatting of each "level" comes from the style applied whatever your choice (default – template....)


When you modify a paragraph set in a given style, nothing happens, this is what we call "direct" formatting. The style itself is not affected. But tables of contents are the exception : all TOC styles are set on *Automatically update*. Insert a line, change the font, the size, the color ... and the style is automatically modified accordingly. Sometimes add an F9 to finalize.

### 5.3.4 Caution with page numbering

Don't leave the table of contents as a field. When the table of contents is viewed as a field code, it only covers one page while it would cover far more if viewed as result. If you insert the table of contents at the beginning of a document the page numbering will be affected (the first document page might be 3-4-5 instead of 2).

To make sure the page numbering is correct you can **insert the table of contents into a specific section and then modify the start number for the « document » section.**

### 5.3.5 Placing the table elsewhere

- Select the field code {TC \o "1-3"}. Cut and paste it at the required location or delete the code and insert a new table of contents at the required location.
-  When a table of contents already exists, Word will prompt you to decide whether to replace it. YES and it is overwritten, NO and a new table of contents is inserted at the insertion point.

### 5.3.6 Updating the table

- REFERENCES Tab – TABLE OF CONTENTS Group – UPDATE TABLE Button or
- Table inside a content control : click on UPDATE TABLE or
- As the table is a field code, update the field by pressing the **F9** key inside it or
- Right click the table and click on the **UPDATE FIELD** option.

Word will then prompt you to choose between UPDATE PAGE NUMBERS ONLY (the contents itself is not affected), or UPDATE ENTIRE TABLE (the whole table is re-generated)

### 5.3.7 Deleting the table

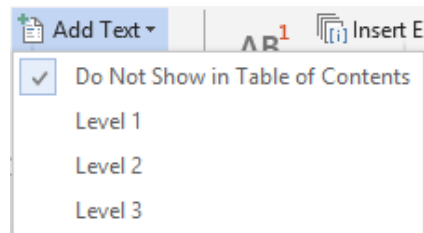
Go back to the tables gallery and click on the REMOVE TABLE OF CONTENTS option or select the whole field and press the DEL key.

## 5.4 You have omitted to set a paragraph in Heading 1, 2, 3 ...

Of course you can assign the style as usual but it is good to know that as the Ribbon happens to display the REFERENCES Tab, the following button provides some interesting « shortcuts » :

REFERENCES Tab – TABLE OF CONTENTS Group

*Do not Show ... = Normal*  
*Level 1 = Heading 1*  
*Level 2 = Heading 2*  
*Level 3 = Heading 3*

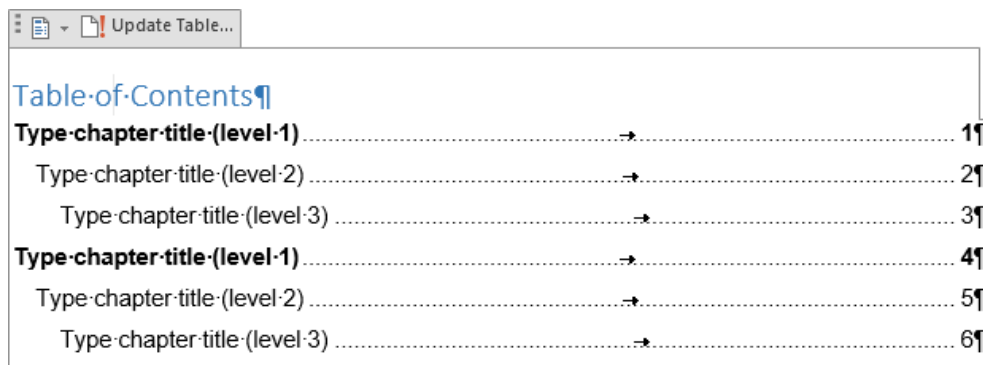


Then update the table.

## 5.5 Special : inserting a fully manual table (there are no Heading 1, 2, 3 ... styles in the document)

Building manually a table can happen when the document contains no Heading 1, 2, 3 ... This is rarely the case (or should be !). But nevertheless there are some cases. For instance : each « chapter » is introduced by a drawing, a WordArt ... that a « normal » table of contents cannot manage.

REFERENCES Tab – TABLE OF CONTENTS Group – TABLE OF CONTENTS Button – Choose MANUAL TABLE

A screenshot of the 'Update Table...' dialog box in Microsoft Word. The dialog shows a preview of a table of contents. The title is 'Table of Contents'. The table has two main sections. The first section has a 'Type-chapter-title-(level-1)' entry with a page number of 1, followed by two sub-entries for 'Type-chapter-title-(level-2)' and 'Type-chapter-title-(level-3)' with page numbers 2 and 3 respectively. The second section has a 'Type-chapter-title-(level-1)' entry with a page number of 4, followed by two sub-entries for 'Type-chapter-title-(level-2)' and 'Type-chapter-title-(level-3)' with page numbers 5 and 6 respectively. The page numbers are right-aligned and followed by a double vertical bar symbol.

**You need to type the required text and also indicate manually the page number.**

To add a paragraph (whatever the level), simply use copy-paste.

The content control still shows UPDDATE TABLE ... But this is a « false » proposition because the control remains set on searching occurrences of Heading 1, 2, 3 ... If you click on the option, Word fails and informs you.

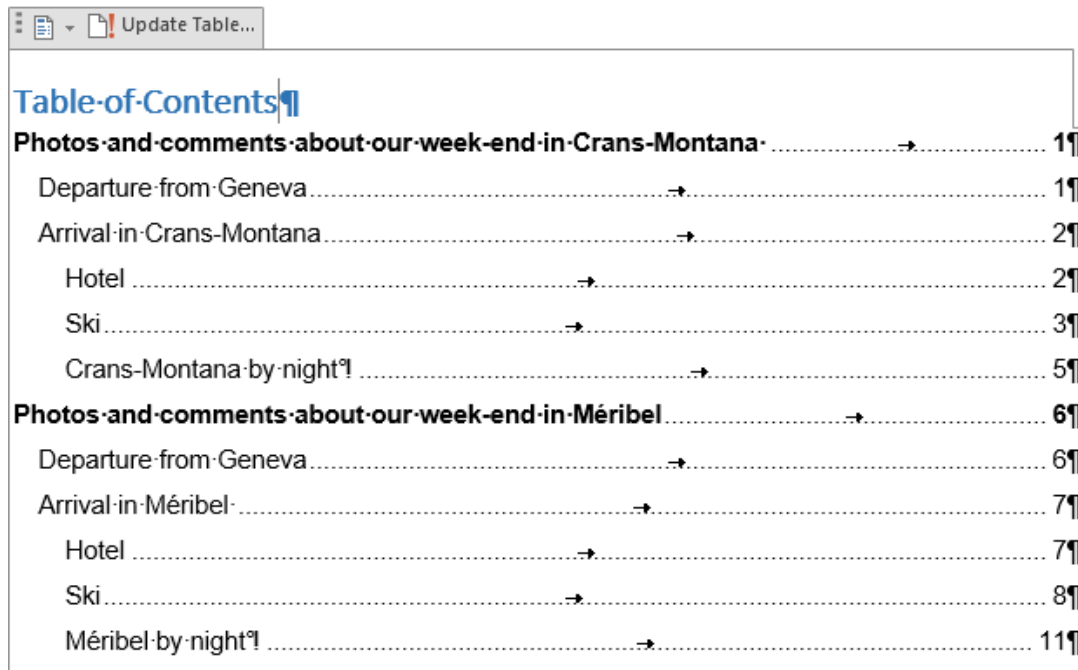


Table-of-Contents	
<b>Photos and comments about our week-end in Crans-Montana</b>	<b>11</b>
Departure from Geneva	11
Arrival in Crans-Montana	21
Hotel	21
Ski	31
Crans-Montana by night!	51
<b>Photos and comments about our week-end in Méribel</b>	<b>61</b>
Departure from Geneva	61
Arrival in Méribel	71
Hotel	71
Ski	81
Méribel by night!	111

\* Numbering ? Apply a multilevel list (with no link to Heading 1, 2, 3 ...)

**☛ the fact that this table is manually built implies that it should be SHORT and not subject to many future modifications.**

If your document is long, try to avoid building the table manually. Try to use the Heading 1, 2, 3 ... styles to create a hierarchy. If it is impossible, this is what you can do to create a « semi-auto » table of contents :

- Place the cursor at the beginning of the « chapter »
- INSERT Tab – TEXT Group – QUICK PARTS Button – FIELD Option – Select the TC field
- Type the text and assign a *hierarchy level* to it.
- Do the same for the other future table levels
- REFERENCES Tab – TABLE OF CONTENTS Group – TABLE OF CONTENTS Button – INSERT TABLE OF CONTENTS Option – OPTIONS Button – Turn on : TABLE ENTRY FIELDS
- The table is generated : the format assigned to the table levels are the usual TOC1, TOC2 ... styles. If you need to add some numbering : a multilevel list will work fine.



## 6 Our company wants to use custom styles – is it possible ?

**Solution** : rename the HEADING 1, 2, 3 ... styles by adding behind the « Word name » a comma and then the name of your company. For instance : *Heading 1,Company 1 – Heading 2,Company 2*). This does not prevent Word from working « normally ».

**It is possible to work with 100% custom styles** but the price to pay might be quite heavy to make functionalities such as outline, numbering and table of contents work properly.

### Styles

The company will create a custom style for each level, opting for a clear name.

Examples : *Level 1, Level 2, Level 3 – Company 1, Company 2, Company 3 ....*

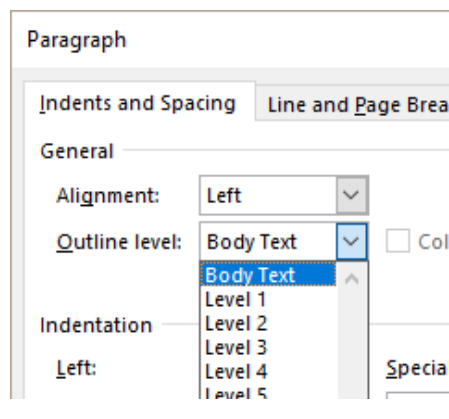
Company-1 ¶  
Text ¶  
Company-2 ¶  
Text ¶  
Company-3 ¶  
Text ¶

### 6.1 Outline view

#### Assigning a hierarchy level

Word only « recognizes » Heading 1, 2 ... Consequently the style must be manually hierarchized.

Styles Pane – **Modify each custom style** by assigning a level in the PARAGRAPH dialog box



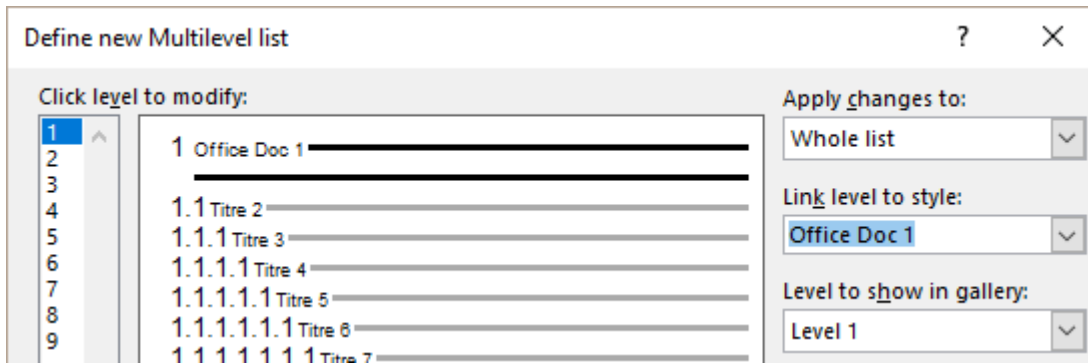
Now the outline can show the levels

+ Office-Doc-1 ¶  
+ Office-Doc-2 ¶  
+ Office-Doc-3 ¶

*But you also must know that you will not be able to use the Promote / Demote buttons. You will have to apply manually the next style up or down in the hierarchy.*

### 6.2 Numbering the styles

Once again, only the « real » Heading 1, 2 ... are recognized. Nevertheless you can match your custom styles to levels. But this will have to be done for each level in the *Multilevel list* customize box :



Now the numbering can be run

**1.→ Office-Doc-1¶**

Text¶

Text¶

**1.1.→ Office-Doc-2¶**

Text¶

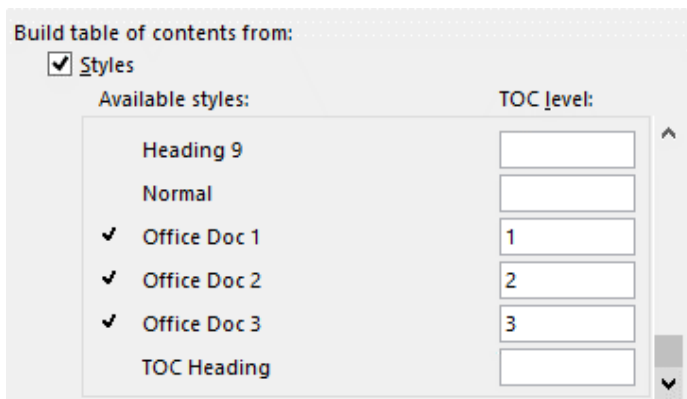
Text¶

**1.1.1.→ Office-Doc-3¶**

### 6.3 Table of contents

Once again, automatic tables of contents can only be built on « real » Heading 1, 2, 3 ... styles. Consequently it is necessary to set the levels :

- REFERENCES Tab – TABLE OF CONTENTS Group – TABLE OF CONTENTS Button –INSERT TABLE OF CONTENTS Option – OPTIONS Button :



Now you can insert the table of contents :

" **Table-of-contents¶**

¶

1.→ Office-Doc-1.....→.....	1¶
1.1. → Office-Doc-2.....→.....	1¶
1.1.1. → Office-Doc-3.....→.....	1¶

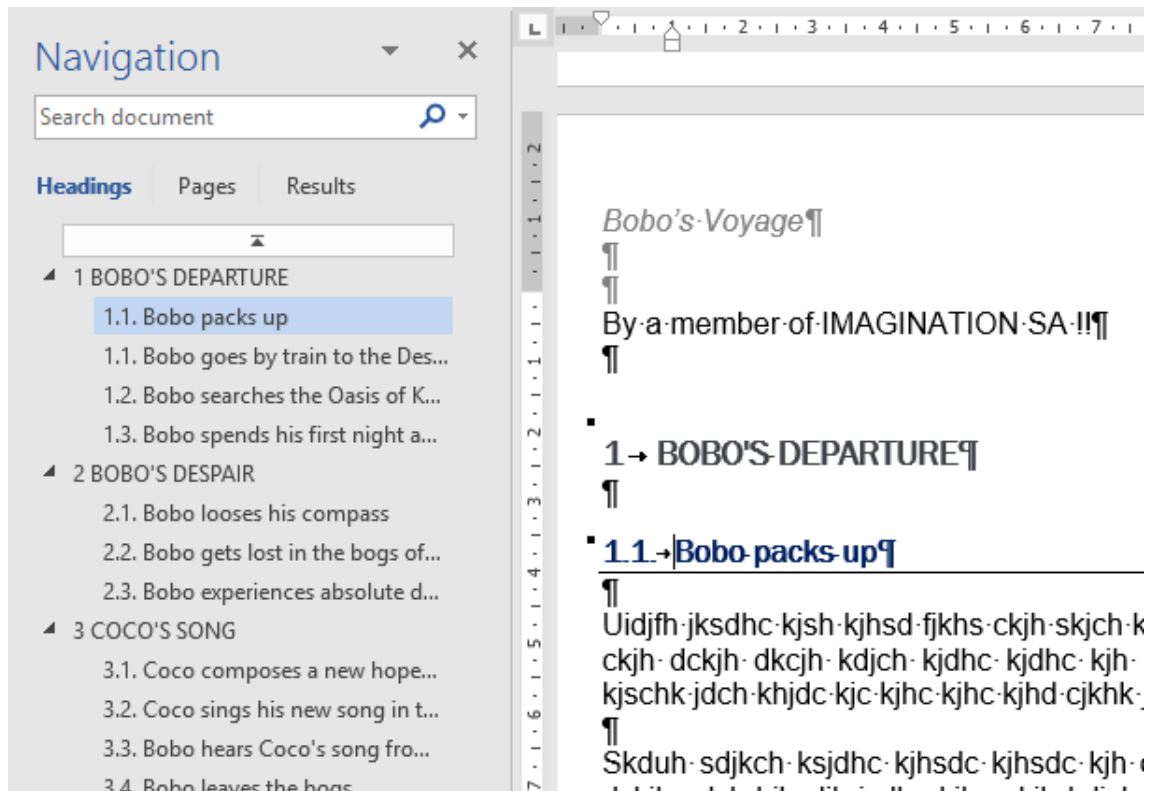
Commands not really accessible to standard users ....

## 7 Useful viewing tool related to long documents

### 7.1 Navigation Pane

Word 2013 provides a new great tool – inspired by PDF : the NAVIGATION PANE.

- VIEW Tab – SHOW Group – NAVIGATION PANE Button



This pane provides *navigation* and also *search tools*

#### HEADINGS

##### Navigating

Provided that your document has been hierarchized into *chapters and subchapters ...*

Click on the required title

Before the title text, there is a triangle you can use to expand or collapse the topic.

##### Moving text

Click and drag the title and all its associated text will be moved. Simply check the page breaks afterwards.

##### Searching

Titles that contain the searched text are colored in yellow.

Occurrences are highlighted in yellow in the document itself.

Click on the triangles to switch from one occurrence to the other.

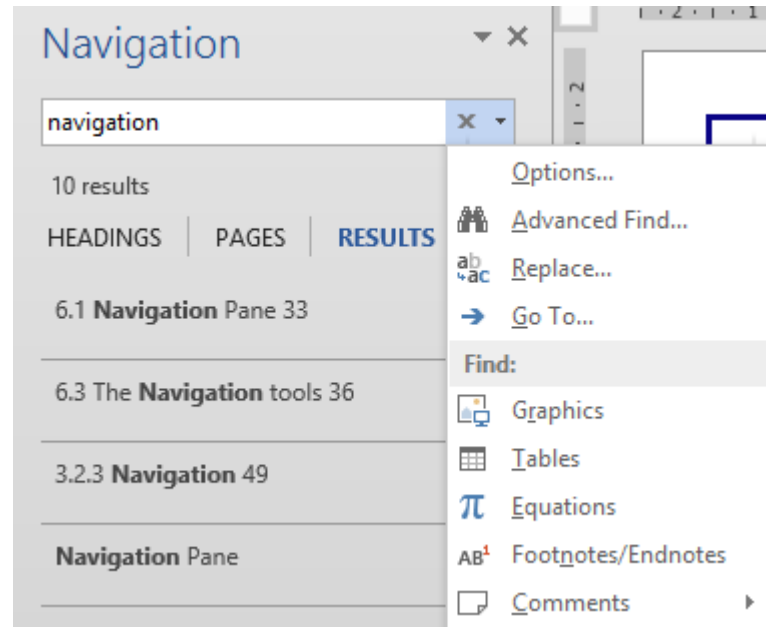
## PAGES

To show a miniature for each page

*Search : click on the triangles to switch from a page containing the searched text to the other.*

## RESULTS

### Searching



Type the searched text and the pane below will automatically display a list of all its occurrences

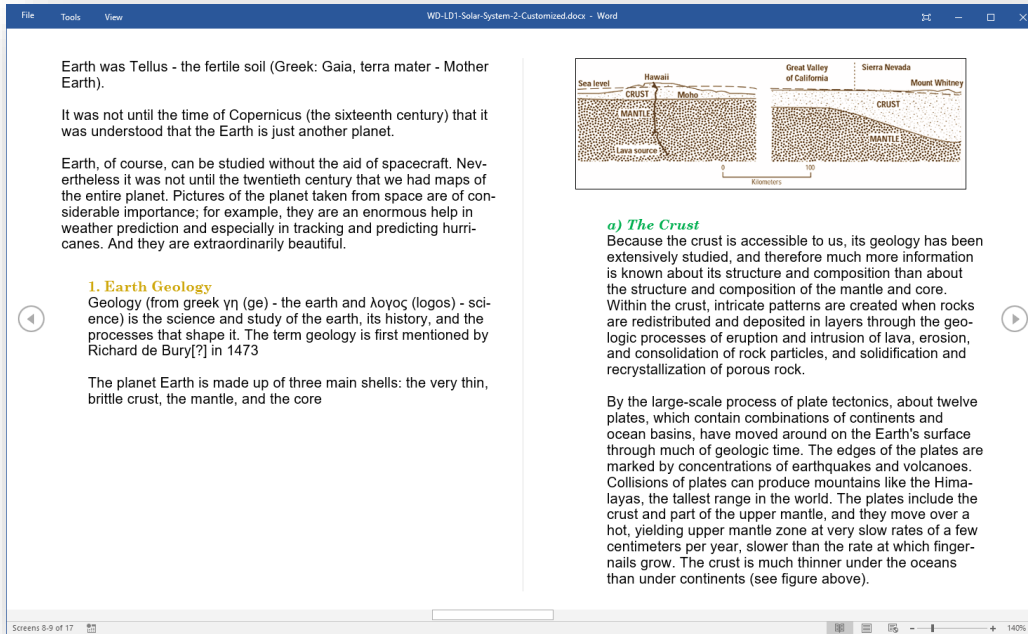
Click on one occurrence and the source text will be automatically displayed in the document. Click the triangle to “jump” from one occurrence to the other

The drop-down list will let you navigate by « item » such as *Graphics*, *Tables*, *Equations* ...

## 7.2 Reading Layout

The document is automatically resized to use the full window  
The document is displayed in two columns to make the reading easier

- VIEW Tab – SHOW/HIDE Group – FULL SCREEN READING Button



Top right of the screen

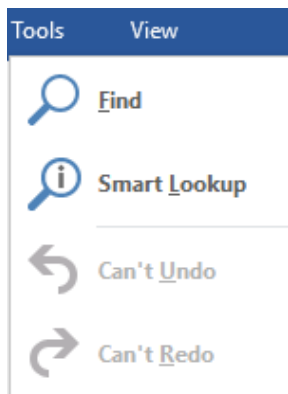


Double-clicking a graphic item such as a picture, a chart ...



VIEW – LAYOUT – PAPER LAYOUT

Top left of the screen



*Hide the tools*

(they are located at the top left of the screen)

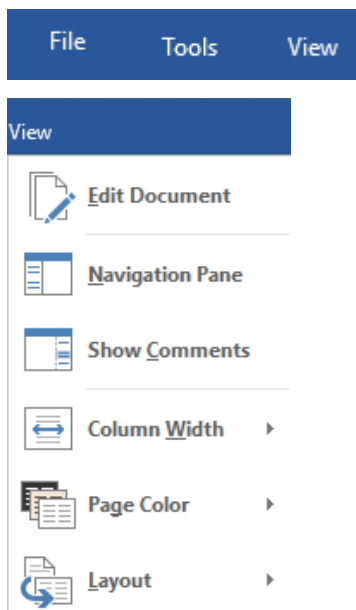
*Minimize*

*Previous size*

Zoom in (light)

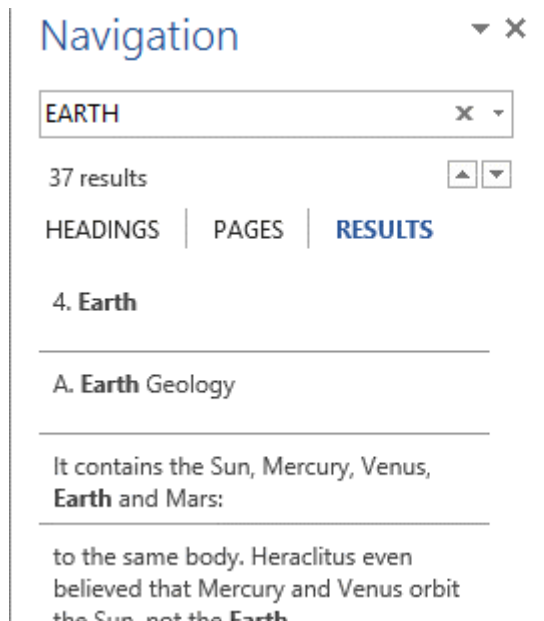
In horizontal orientation : navigation from page to page

The above buttons disappear and you can use normal scrolling down to navigate



## TOOLS - FIND

Searching for specific text in the document. The Navigation Pane will be displayed on the left and the found text will be highlight on the right but also in the styles/ pages tree if you click on HEADINGS / PAGES.



### 4. Earth

Earth is the th

**orbit:**  
**diameter:**  
**mass:**

Earth is the o  
Greek/Roma  
Germanic. TI  
planet in othe  
Earth was Te  
Earth).

It was not uni

## TOOLS – SEARCH WITH BING

The Bing search engine is run (Internet)

## TOOLS – UNDO / REDO

Some tests : systematically greyed out ...

## VIEW – EDIT DOCUMENT

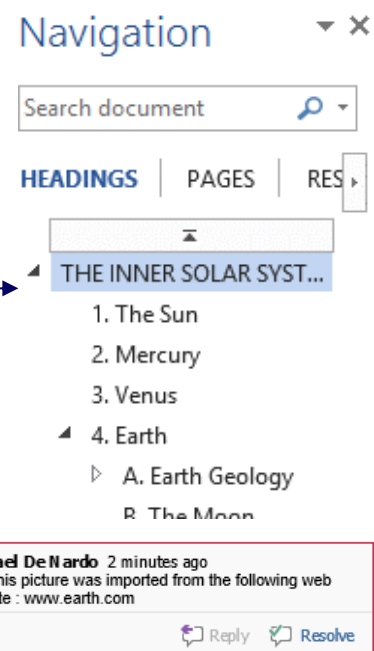
Back to normal view. ESC is faster and more comfortable ...

## VIEW – NAVIGATION PANE

It is the Navigation Pane (normal view mode) (clearly inspired from PDF)

## VIEW – SHOW COMMENTS

Comments are displayed in either in a text box or as a button to click on



### E. Earth

Earth is the third planet from the Sun and the fifth

## VIEW – COLUMN WIDTH / LAYOUT

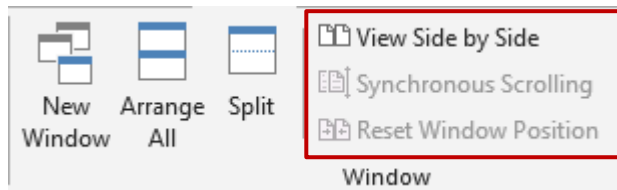
To set as the pages should be displayed : on 3 columns rather than 2, with a background sepia color, as one *continuous page* as in PDF files ...

Note : this read mode might be appreciated more by tactile monitors and tablet users ...

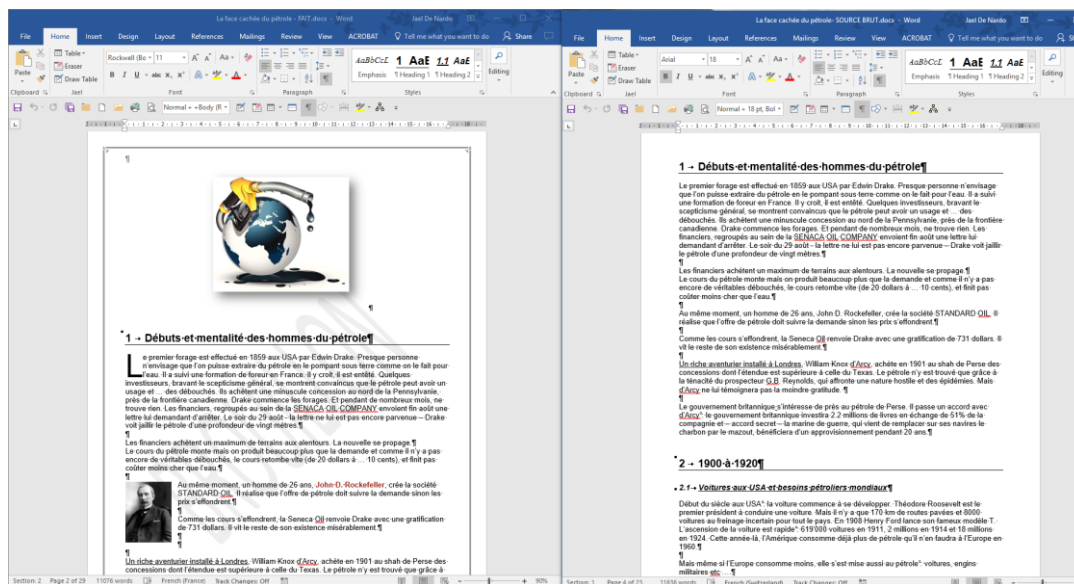
- ✎ This mode can be the default one when you open an attached Word file directly from an Outlook message (by double-clicking). Check in the Word options : FILE – OPTIONS – GENERAL Category- START UP OPTIONS Topic –  **Open e-mail attachments and other uneditable files in reading view** ⓘ

### 7.3 Comparing side by side

- Open both documents and activate the one you want to be displayed on *the left*.
- VIEW Tab – WINDOW Group



- Click on the VIEW SIDE BY SIDE option. If more than two documents are open, a dialog box will be displayed to choose which one you wish to compare.



The other buttons will become available and provide tools to manage this special mode :



Synchronous scrolling



After having modified the width/height of the windows : reset to default size (full with divided by two).

### 7.4 Splitting the Word window

This is a word more common to Excel than Word. But when you want to read a paragraph located on page 1, while typing text on page 10, splitting will prove very useful because you avoid scrolling.

- VIEW Tab – WINDOW Group – SPLIT Button
- A splitting line – in the middle of the screen – « sticks » to your mouse
- Position at the required height
- Click to fix and free the mouse
- You may now navigate as you need in both panes





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## **OTHER FUNCTIONALITIES RELATED TO LONG DOCUMENTS**

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# 1 The concept of SECTIONS

Users are often forced to work with sections in the following cases :

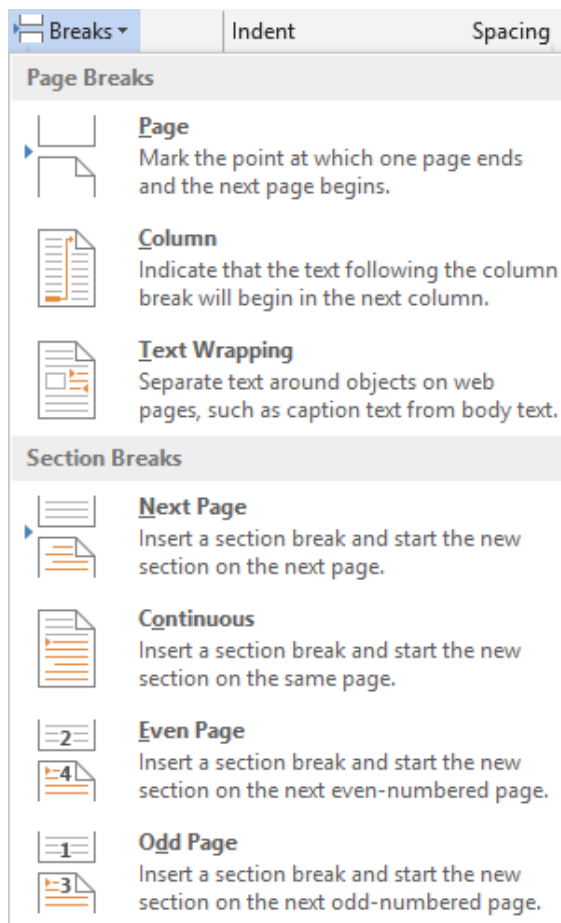
- More than one page orientation is required inside the document (portrait and landscape).
- Several different headers or footers are required inside the document.
- The table of contents requires its own number format, start number ...
- A portion of the document needs to be defined in the *columns* format.
- A form needs to be created – including a locked portion and another portion open to modifications.

## 1.1 What is a section ?

It is a **logical** division of your document. Each time you need a modification for the margins, the size, contents or format of a header/footer, the newspaper style columns ... **for a portion of your document only** ..... you need to define this portion as a separate section. Once the section has been created, you can set specific orders such as special margins, paper orientation and so on. They will be applied to the section only (except for headers and footers).

## 1.2 Creating sections

- Place the cursor at the required place in the document.
- PAGE LAYOUT Tab – PAGE SETUP Group – BREAKS Button
- Choose the type of section break that is required



### Common cases :

- Next page** Some pages in portrait, some in landscape.  
**Continuous** A part of the page in the newspaper style columns.  
**Odd Page** The beginning of each chapter of a report that will be photocopied recto-verso must absolutely start on the right page, that is an odd page. If the last page of the previous chapter ends on an odd page, Word automatically adds a blank page when printing and adjusts the page numbering

Caution : to « isolate » a portion of the document – either just on one page or spreading over more pages – it is necessary to make sure to insert a section break *at the beginning and at the end* of the portion.

## 1.3 Headers/footers and sections

1. It is possible to set a FIRST different header/footer : PAGE LAYOUT Tab – PAGE SETUP Group – Dialog box launcher – LAYOUT Tab – DIFFERENT FIRST PAGE Option.

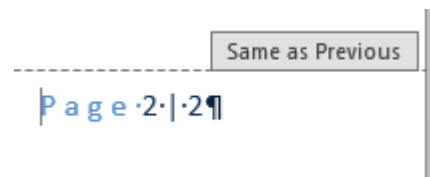
But caution, it means that **the first page of each section will be different and not simply the first page of the document**

If you need a different first page *for your document*, make sure to order this AFTER you have created the sections. Why ? Because each time you create a new section, it automatically retrieves the settings of the current one (in this case, the *Different First Page* order).

2. **By default, headers and footers are not affected by section breaks because they are always repeated across sections.** Why ? This is logical. Indeed you certainly would not want to insert the page number at the beginning of each section.



This is the reason why if you delete a header or a footer, or if you modify the text, the changes are applied across ALL SECTIONS

This comes from an information that often users don't see : *Same as Previous*



Consequently you need to cancel this setting : HEADER & FOOTER TOOLS – DESIGN Tab - LINK TO PREVIOUS Button.

*Advice : if your document has a lot of sections, it is a good idea to start **from the end**.*

-  Funny to say, if you only modify the page number format or its starting number, the change will not be applied to all sections. Always check what you do and what effect it has on the document.
-  When the section header/footer is no longer linked to the previous one, click on the LINK TO PREVIOUS button will insert the content of the previous section header/footer. You will be prompted to confirm.

## 2 Notes

Notes are used to draw the reader's attention on a word to which a comment is associated. The comment will appear either at the end of the current page or at the end of the document on a separate page.

### 2.1 Creating the note and its reference in the text

- Place the cursor where the note called should appear
- REFERENCES Tab – FOOTNOTES Group – INSERT FOOTNOTE or INSERT ENDNOTE Button
- *Footnotes* : a dedicated area – at the bottom of the page, just before the footer – is automatically activated. Default numbering : 1-2-3



- *Endnotes* : by default the notes are located on the last part of the document (and not of the section), just after the end of the text (even if the text ends in the middle of the page). Default numbering : i – ii – iii. This can be modified in the notes options (dialog box launcher).

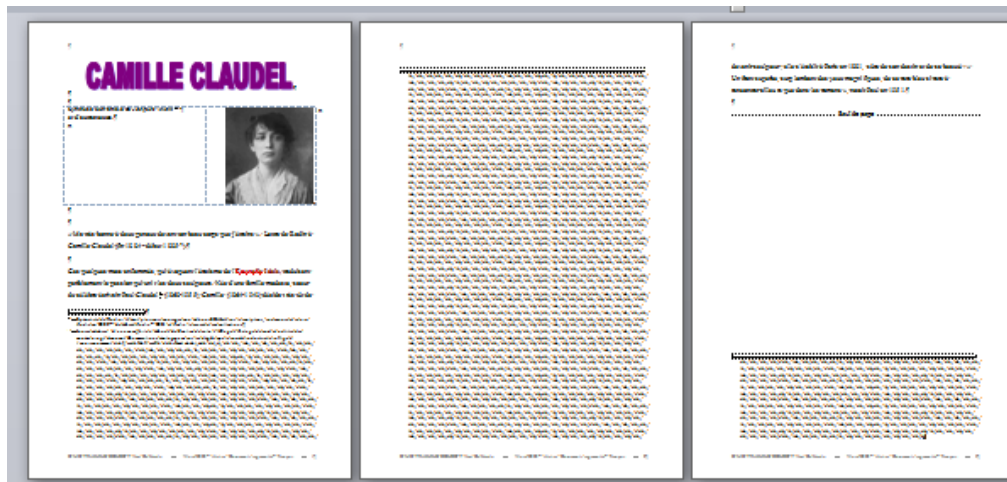
In both cases, Word creates a note callout, at the end of the word, in superscript.

INDIA

### 2.2 What happens when the note contains a very, very long text ?

The text lines located AFTER the note callout but BEFORE the page break are moved onto the next page (automatically when you type your note text). When the text of the note has reached the note callout, Word stops moving lines because it **always leaves the note callout and the beginning of its text on the same page.**

As Word respects any forced page break, the lines that have been moved to the next page, will not be affected by an automatic pagination. So you will be free to carry on typing the text of your note. If the note is longer (!), Word will insert an extra page break as shown in the screen capture below :



The separation line is turned into a continuous line.

### 2.3 Creating a second note

- Place the insertion point where another note callout is needed
- Repeat the option

### 2.4 The format of the note text and of the note callout

This comes from two preset styles :

*The note callout (the number)*  
*The note text*

The text style **Footnote Reference** and **Endnote Reference**  
 The paragraph style **Footnote Text** and **Endnote Text**

What about changing the size, adding a hanging indent when the note text happen to spread on more than one line (it is the case for the above screen capture) ... ?

Display the Styles Pane and if necessary choose to view *All Styles*. Then modify the corresponding style and decide whether to affect the change to THIS document or all documents based on the template (*Normal.dotm* or another *.dotx*)

(See chapter on styles for more details).

### 2.5 Viewing and navigating

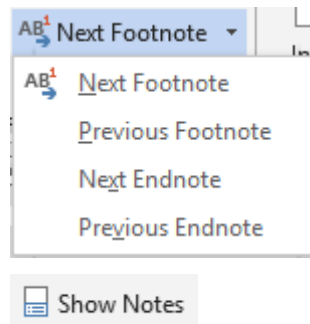
To display the note text : point the note callout in the text and a tooltip showing the text will be displayed.

This part of India was invaded by the famous MOGHOL people. They considerably influenced the Indian gastronomy (vegetarian habits not so strong for example) and the Indian architecture (palaces)

**NORTH INDIA**

Displaying the note dedicated area from the note callout : double-click on the callout number.

Navigate from one note to the other : REFERENCES Tab – FOOTNOTES Group – The following button and its possibilities :



Display the notes dedicated area : click on the following button (same Tab – same Group) :

- ✎ If your document has really a lot of notes, you may also type the number of the required note (45 for instance) directly into the GO TO dialog box. Access to this box : F5 or double-click on the page number on the status bar or HOME Tab – EDITING Group – FIND Button.

## 2.6 Copying / moving / deleting a note


- Select the note callout in the text.
- Proceed as usual : copy-cut / paste or DEL key ... as if it was a standard text.

## 2.7 Deleting all notes

No global command, but this is what you can do :

- HOME Tab –EDITING Group – REPLACE Button – Then click on the MORE button, then on the SPECIAL button to display the special characters.
- Select the required type of note
- Run a global replace of the notes by NOTHING

## 2.8 Converting footnotes into endnotes

- Select the notes in the notes area at the bottom of the page
- Right click the selection and click on the CONVERT TO ENDNOTE option.
-  Converting is done note by note or all selected notes but only for THIS PAGE. **For a global command**, use the CONVERT button in the group dialog box (launcher). See next screen capture.

## 2.9 The notes dialog box and its additional options

- REFERENCES Tab – FOOTNOTES Group – Dialog box launcher

The various options will let you

- ✓ Choose the notes location (below the text instead of bottom of page for footnotes, end of section rather than end of document for endnotes)
- ✓ Convert the location of all the notes (CONVERT button)
- ✓ Change the number format or its starting number ...
- ✓ Restart the numbering at the beginning of each new section

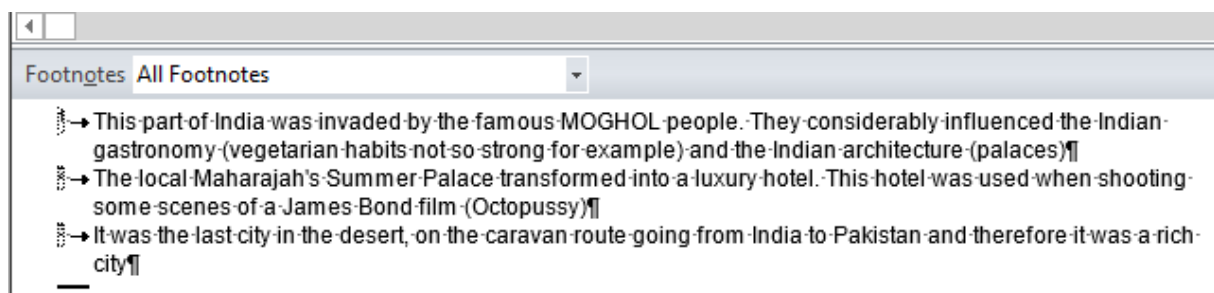
- As long as you are working with automatic numbers, there will be an automatic update when you move or delete a note.

You can choose custom marks (*Custom mark / Symbol*), but caution the notes will show the chosen mark or symbol **even though you might add or delete notes later on**. Can be handy if you absolutely need the same number more than once or if you need to display a text such as *Ref* in front of the number.

## 2.10 Modifying the footnote separator, manage the footnote continuation separator or notice

In PAGE LAYOUT – the usual default view – the footnote separator cannot be modified and a note spreading across pages do not show a continuation separator/notice, just a continuous line.

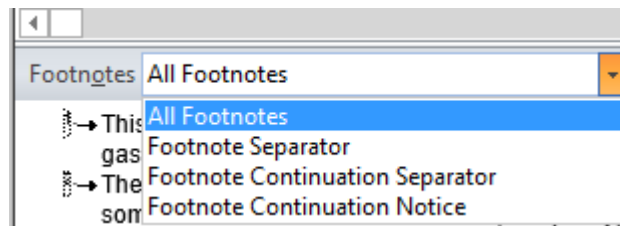
But this can be modified in the DRAFT view (last button at the right of the status bar or VIEW Tab ...). Reminder : this mode hides headers/footers. Double-click on a note callout and here below the notes pane that will be displayed :





The pane can be sized as needed by dragging its top border.

Display the pull-down menu :



It is possible to *replace* or *delete* the Footnote Separator, but not *modify* it. Same for the Footnote Continuation Separator.

You can type a text and set it as your Footnote Continuation Notice. It will be placed at the end of the note, just where it continues onto the next page.

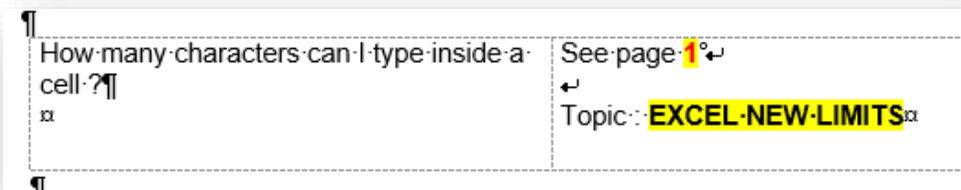
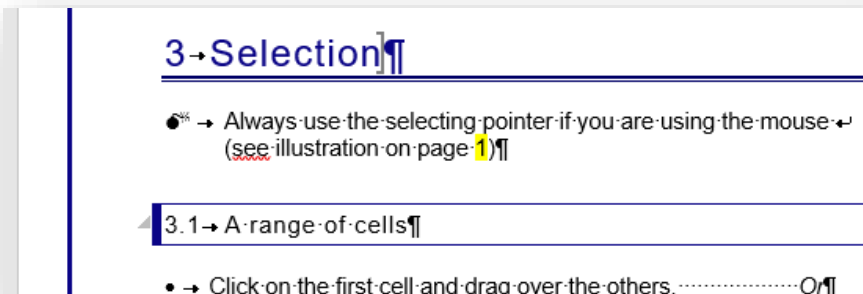
To reset the default values click on the **RESET** button. (*it appears when you modify, left to the CLOSE button*).

## 2.11 Choosing not to print the notes

There is no print option called : WITHOUT NOTES.  
You need to copy the document – delete the notes – and print it.

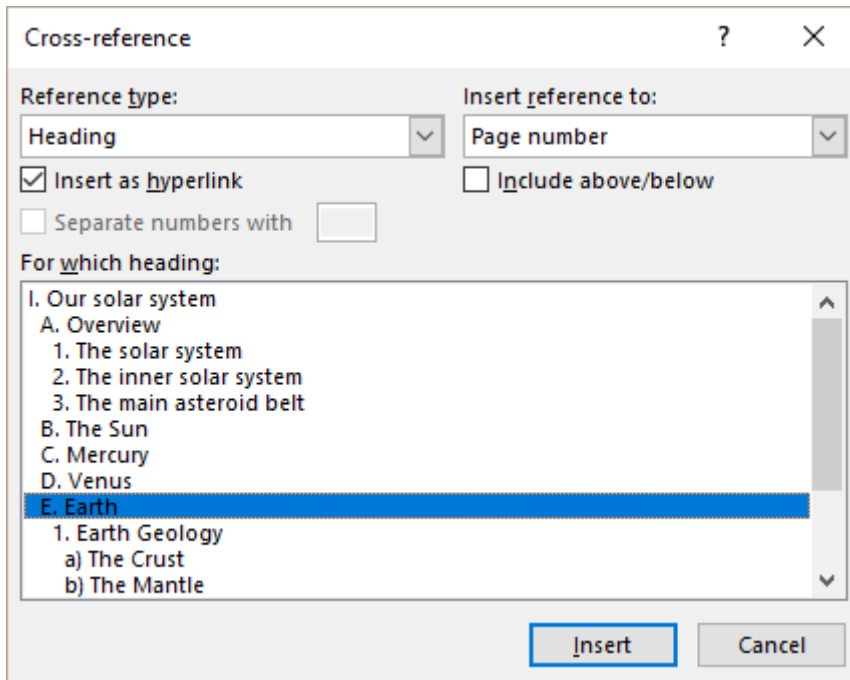
## 3 Cross-references

Here below some examples .

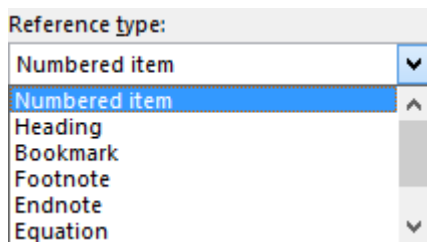


### 3.1 A cross-reference referring to an item recognized by Word, such as a heading, a table...

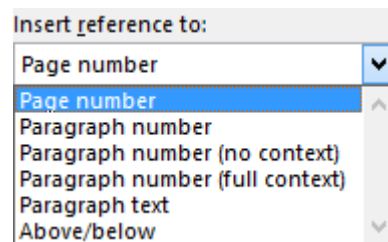
- INSERT Tab – LINKS Group – CROSS-REFERENCE Button



What does Word recognize ?



What kind of information can I retrieve ?



*Insert as hyperlink* : when you will click the cross-reference, a tooltip will be display and show the following text : « Ctrl + Click to follow link ».

### 3.2 Cross-reference referring to a bookmark

What if the cross-reference relates to an item that is not recognized by Word ?  
 « Mark » the item (picture, text portion, special location) as a bookmark

#### 3.2.1 Assign a bookmark

- Select the text  
*With no selection only the location will be memorized. When you create the cross-reference, you will be able to insert the name of the page but obviously no related text.*
- INSERT Tab – LINKS Group – BOOKMARK Button

### *Name of bookmark*

50 car. maximum, must start with a letter and should not include a space.

### *Sort by : Name*

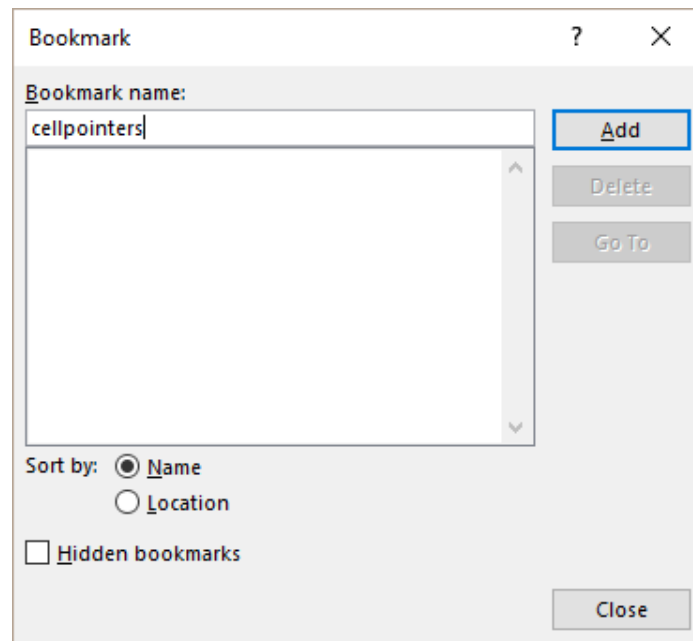
Sorted by alphabetical order

### *Sort by : Location*

Sorted by their order of appearance in the document

### *Hidden bookmarks*

Bookmarks created by Word and hidden – in table of contents for instance.



### 3.2.2 Viewing the bookmarks

By default they are not displayed. To view the bookmarks you must specify it in the Word options :

- FILE - OPTIONS – ADVANCED OPTIONS Category – SHOW DOCUMENT CONTENT Topic – SHOW BOOKMARKS Option
- Word indicates the beginning and the end of the bookmarks with brackets [ ]

### 3.2.3 Navigation

Bookmarks can be accessed with the GO TO dialog box : F5 or double-click on the page number on the status bar or HOME Tab – EDITING Group – FIND Button.

### 3.2.4 Inserting text inside a bookmark

Cursor after the first bracket : the text will be part of the bookmark.

Cursor after the last bracket : the text will be out of the bookmark

### 3.2.5 Deleting a bookmark

- Go back into the bookmarks dialog box – select it and click on the DELETE button

 If you delete the text assigned to a bookmark, you automatically delete the bookmark too.

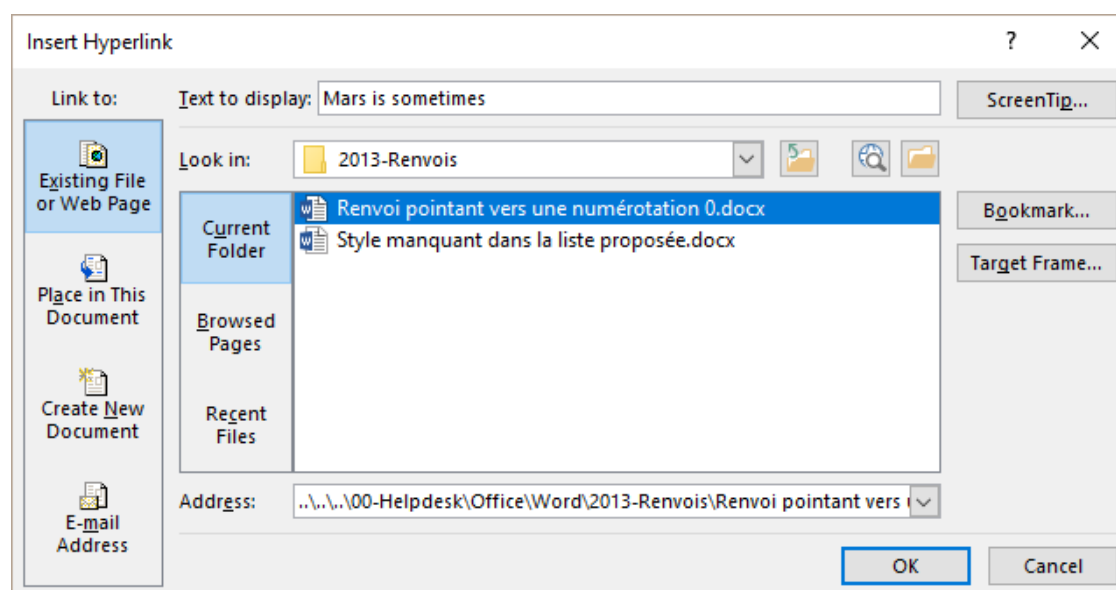
### 3.2.6 Creating the cross-reference

As you would do for a standard element, recognized automatically by Word :

- INSERT Tab – LINKS Group – CROSS-REFERENCE Button
- Select the BOOKMARK reference type
- Select the bookmark in the list and choose to what it will retrieve (text, page number ...)

### 3.3 A special « cross-reference » : a hyperlink

- INSERT Tab – LINKS Group – HYPERLINK Button



#### **Text to display**

The linked text : you can type a text but if you have select it before it will be automatically displayed in this textbox.

#### **ScreenTip**

A tooltip is automatically displayed when you point a hyperlink. It has two main parts :

1. The web address, the file name etc ...
2. The information « CTRL + Click to follow link »

You can type another text to replace part 1.

#### **Existing File or Web Page**

You can browse through your active folder, recently visited web pages, recently worked files, run Internet to search for a special address ...

If the selected document contains a bookmark, you can select it (and consequently its location in the document). For Excel workbooks, the bookmark will be a sheet or a named cell.

You can also manually type a web address

#### **Place in this document**

Word lists all document styles (Heading 1, 2 ,3 ...) as well as all bookmarks

#### **E-mail address**

As soon as you type the address, *mailto* will be displayed in front of the address. You may leave as such.

You may type the text that will become the message subject.

For web addresses and e-mail addresses, it is important to mention that you can also simply type them and they will be automatically converted into hyperlinks.

### 3.4 Cross-reference or hyperlink : both are field codes

Examples : { PAGEREF \_Ref183849780 \h } – { HYPERLINK <http://www.md-training.ch/> }

Screen updating : F9 on the cross-reference field or right click and UPDATE FIELD (all : CTRL + A beforehand to select the whole document)

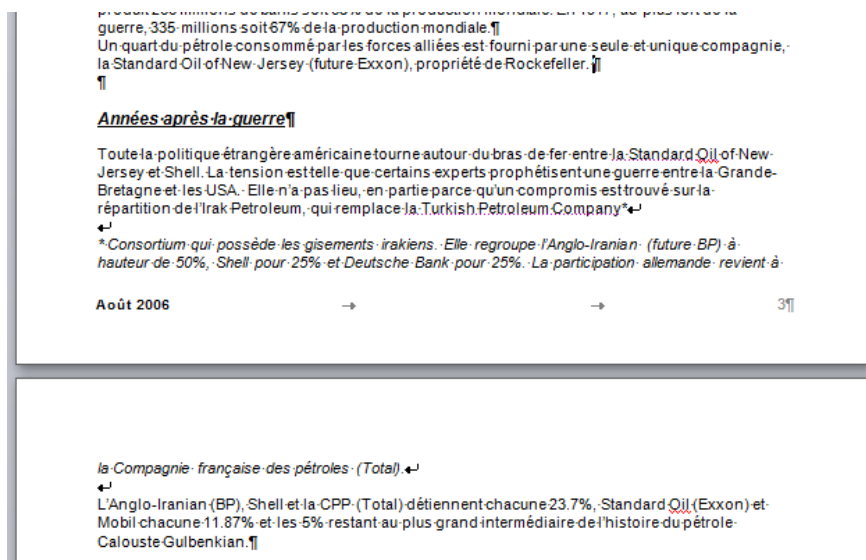
Update when printing This is set in the Word options : OFFICE Button – WORD OPTIONS Button – DISPLAY Category – PRINTING OPTIONS Topic – UPDATE FIELDS BEFORE PRINTING Option

## 4 Page layout tools

### 4.1 An automatic page break should not separate a title from its paragraph or separate the lines of a paragraph

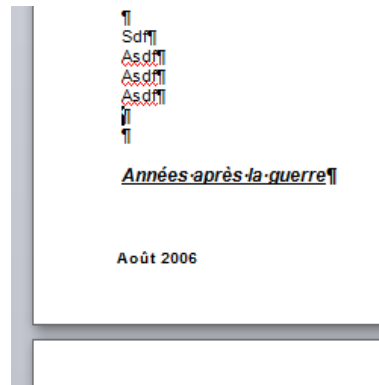
In most cases, you'll want to insert forced page breaks at various key locations (end of chapters, after a chart ...). But it is also possible to give Word special instructions about automatic page breaks so that you will not have to insert too many forced breaks.

Here below a topic at the bottom of a page, inside a document that was a summary of the history of oil (in French) :



By default, Word only inserts a page break inside a paragraph if at least two lines can be displayed at the bottom of the previous page. This is called *Widow / Orphan control*. (first option in the dialog box on the next page).

If you add text before the title *Années après la guerre*, the paragraph after the title will be displayed on the next page because there are no longer a minimum of two lines. The title remains on its own at the bottom of the previous page.

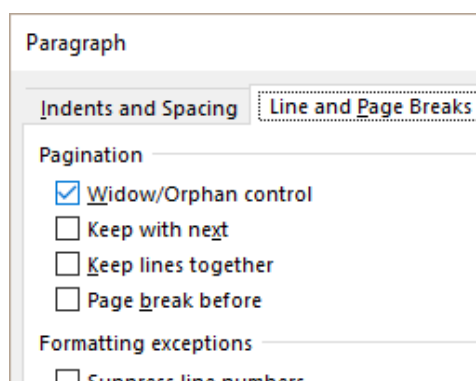


You can prevent this from occurring :

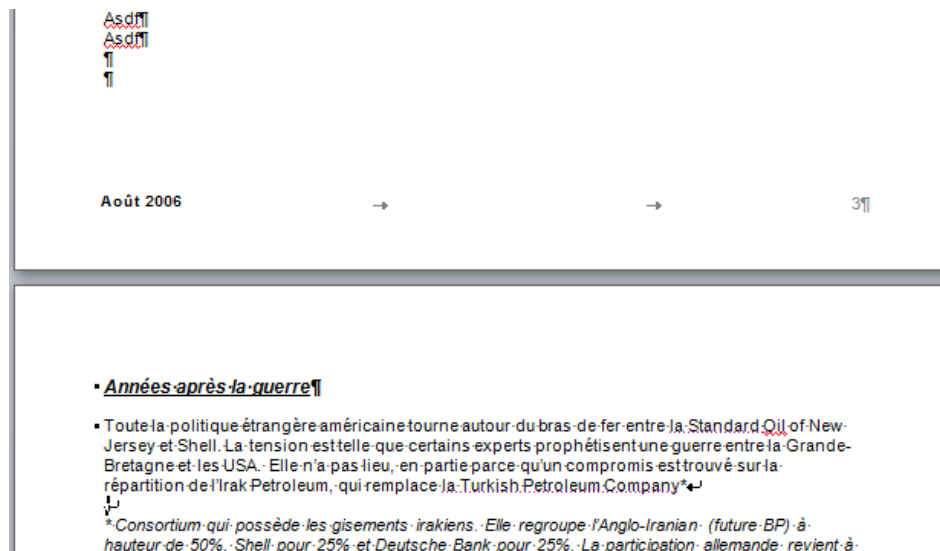
- Keep with text*                      no page break will separate the title from its paragraph
- Keep lines together*            no page break will occur inside a paragraph

Access to these options :

HOME Tab – PARAGRAPH Group – Dialog box launcher :



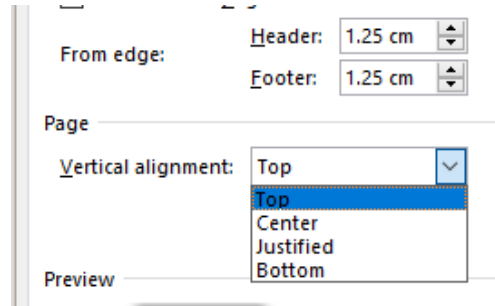
Here after the result with our document :



A small black square located left to the title and the beginning of the paragraph indicates that they are linked.

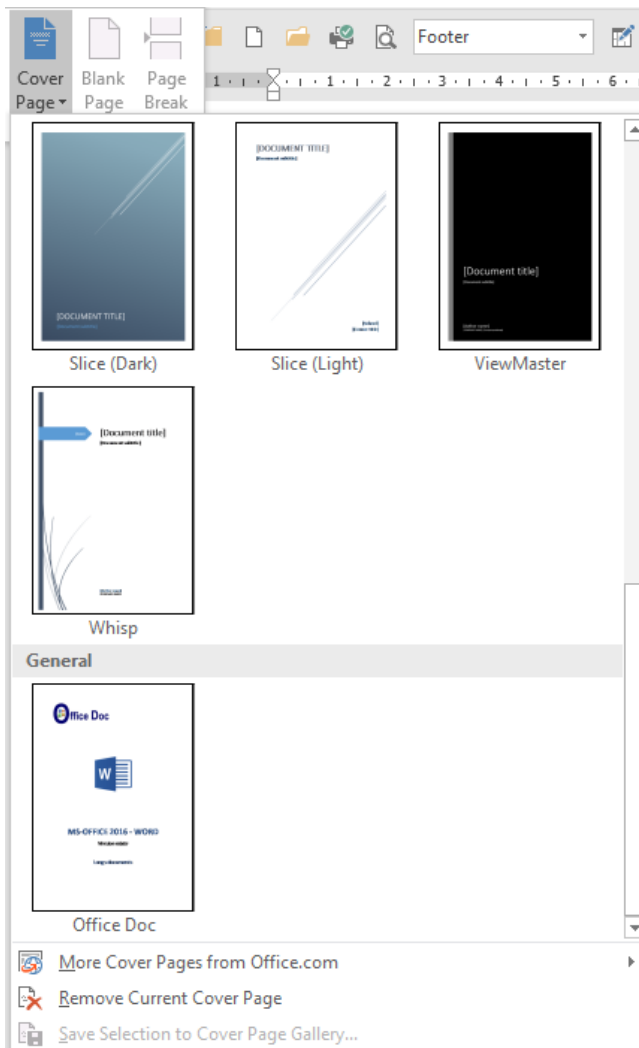
#### 4.2 « Section » title in the middle of the page (vertically)

1. Make sure to isolate this page and make it a section
2. Type the title and format it as required
3. DO NOT INSERT returns before the title to « aim » the middle
4. Make sure to place the cursor inside this page
5. PAGE LAYOUT Tab – PAGE SETUP Group – Dialog box launcher :



#### 4.3 Inserting a cover page at the beginning of the document

- INSERT Tab – PAGES Group – COVER PAGE Button



Some areas can be pre-filled as they may retrieve information from the document properties.

By default the cover page has no header/footer. But it is considered as page 0 and the next one will therefore be numbered 1.

Custom page cover (as the Office Doc one) in the GENERAL section : you must first select it and then click on the SAVE SELECTION TO ... option.

*Remove* : display the gallery again and click on REMOVE CURRENT COVER PAGE





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## **THE CONCEPT OF FIELD CODES**

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*(that you have encountered for table of contents, cross-references ...)*



# 1 What is a field code ?

---

It is an instruction given to Word that will generate a result. Examples :

A field code used to calculate. To create an easy mathematical calculation, display its result and still keep access to the formula.  $\{=345/1.66 \# "###0.00"\} = 207.83$

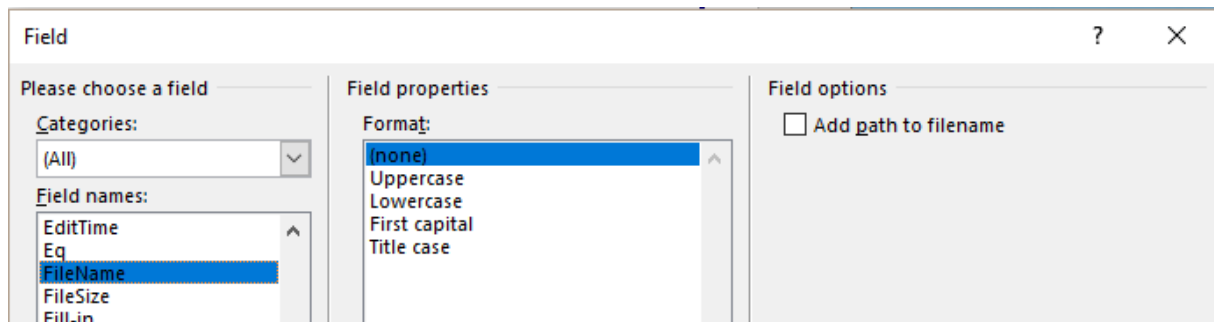
Name and path of the current document  $\{ FILENAME \p \* MERGEFORMAT \} =$   
D:\Office 2013\WD-2013-English-MailMerge.docx

# 2 How do you get them ?

---

For some, it is necessary to create them manually. It is the case for the above two codes (previous topic). They have been created through :

- INSERT Tab – TEXT Group – QUICKPART Button – FIELD Option ...



But most of the time field codes are inserted in the document simply because the function you are using generates them automatically. It is the case when you insert a table of contents, an index .... and use the mail merge process.

# 3 What is a field code made of ?

---

{ }	Encapsulation (the braces). Caution : these are not characters you can type on the keyboard !
{DATE}	The name of the field.
{DATE \@ "d-MMM-yy"}	Switch or other indications - here the date format.

## 4 Handy shortcuts for field codes

---

If necessary : cursor inside the field :

<b>F9</b>	To update the field.
<b>CTRL + A then F9</b>	To select the whole document and update all its fields.
<b>SHIFT + F9</b>	To switch between code and result for a given field.
<b>ALT + F9</b>	To switch between code/result for the whole document codes.
<b>CTRL + SHIFT + F9</b>	To freeze (there is no field anymore, only the result).
<b>F11</b>	To jump from one field to the other and select it (forwards).
<b>SHIFT + F11</b>	To jump from one field to the other and select it (backwards).
<b>CTRL + F11</b>	To lock a field to prevent any change.
<b>CTRL + SHIFT + F11</b>	To unlock a field.
<b>CTRL + F9</b>	To create manually a field : the user must type the name of the instruction and the codes if there are any

### Right-clicking the field :

Right click a field and the shortcut menu will display various commands including : *Update*, *Edit* or *Toggle*.

## 5 Formatting a field

---

You format the whole code to ensure that the assigned attributes will be kept, even when the field is updated. One exception : a table of contents as the formatting comes from the TC1, TC2 ... styles).

## 6 General settings related to field codes

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- FILE – OPTIONS – Category :

### **Display / Printing options**

*Update fields before printing*

### **Advanced / Show document content**

*Show field codes instead of their values*

*Field shading : when selected – never - always*  
The field code is displayed with a grey shading or not according to your choice.