



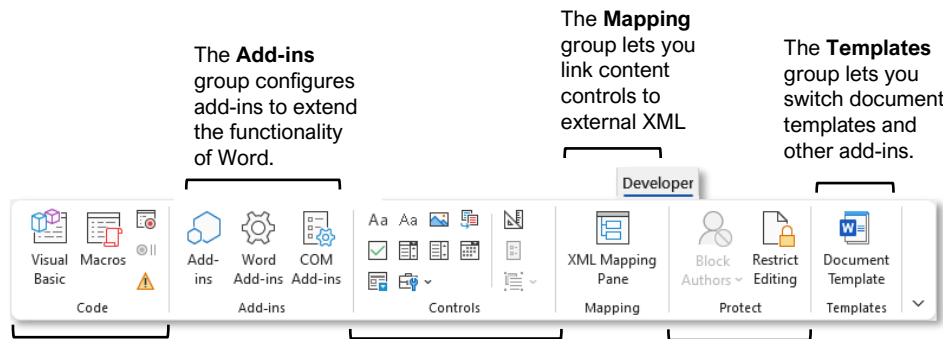
Microsoft®

# Word 2021 Advanced

## Quick Reference Guide



### The Developer Tab



The **Add-ins** group configures add-ins to extend the functionality of Word.

The **Mapping** group lets you link content controls to external XML

The **Templates** group lets you switch document templates and other add-ins.

The **Code** group contains commands to record and edit macros, as well as control the level of macro security in Word.

The **Controls** group lets you add form controls to a document. Click **Design Mode**, then click a form control button to insert it. Click **Design Mode** again when you're finished.

The **Protect** group lets you restrict the ability to make changes to a document (or certain parts of a document).

### Forms

#### Add Forms to a Document

**Enable the Developer Tab:** Before adding forms, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

**Add a Form Control:** Place the text cursor where you want the form control, click the **Developer** tab, click the **Design Mode** button in the Controls group, and click the button for the form control you want to add. Click the **Design Mode** button again when you're finished adding form controls.

**Finalize a Form:** Click the **Developer** tab and click the **Restrict Editing** button to open the Restrict Editing pane. Check the **Editing Restrictions** check box, click the **Editing Restrictions** list arrow, and select **Filling in forms**. Click the **Yes, Start Enforcing Protections** button, enter a password (optional), and click **OK**.

### Collaborate in Word

**Share a Document:** Make sure the document is shared to an online-accessible location, such as OneDrive or SharePoint. Click the **Share** button above the ribbon and enter someone's email address in the Invite People field (or, click the **Address Book** button and select someone in the Address Book dialog box). Choose their permission level by clicking the permissions list arrow and selecting a level. Enter a short message (optional), then click the **Share** button.

**Highlight Text:** Select the text you want to highlight, click the **Text Highlight Color** button list arrow on the Home tab, and select a highlight color.

**Insert a Comment:** Select the text you want to add a comment to, click the **Review** tab, click the **New Comment** button, and add your comment. Click outside of the comment field when you're finished.

**Delete a Comment:** Click a comment to select it, click the **Review** tab, and click the **Delete** button.

**Reply to a Comment:** Click a comment to select it and click the **Reply** button in the comment. Type your response, then click outside the comment field when you're finished.

**Show / Hide Comments:** Click the **Review** tab and click the **Show Comments** button to toggle it on or off.

**Toggle Track Changes:** Click the **Review** tab and click the **Track Changes** button in the Tracking group.

**View Markup:** Click the **Review** tab, click the **Show Markup** button in the Tracking group, and select a type of markup to show or hide.

**Review Revisions:** Click the **Review** tab, then click the **Next Change** and **Previous Change** buttons in the Changes group. Click the **Accept** button to accept a change, or the **Reject** button to reject it.

**Compare Two Documents:** Click the **Review** tab, click the **Compare** button, and select **Compare**. Select the original document from the **Original Document** list arrow (or click the **Browse** icon and select it), then select the revised document from the **Revised Document** list arrow (or click the **Browse** icon and select it). Click the **More** button and select what types of differences to look for (optional). Click **OK**.

**Add Line Numbers:** Click the **Layout** tab, click the **Line Numbers** button, and select an option.

#### Types of Form Controls

**Form Controls:** You can add different types of form controls that allow a user to enter different types of data into a form.

- **Rich Text** **Aa** allows users to enter text that can be formatted with different fonts and font styles.
- **Plain Text** **Aa** allows users to enter text, but not to format that text.
- **Picture** **Image** allows the user to add a picture from their computer or an online location to the form.
- **Check Box** **Check** places a form with a check box that the user can check or uncheck.
- **Combo Box** **Text** adds a list with a text box, where users can choose an option or enter their own.
- **Drop-Down List** **Text** adds a list with several options that a user can choose from.
- **Date Picker** **Calendar** lets the user choose a date from a calendar.
- **Repeating Section** **Text** contains other types of content controls and repeats as many times as you need it.
- **Legacy Types** **Text** of content controls were used in older versions of Word. You can still use them in a Word 97-2003 document.

## Collaborate in Word

**Customize Line Numbers:** Click the **Layout** tab, click the **Line Numbers** button, and select **Line Numbering Options**. Click the **Line Numbers** button. Customize where the line numbers start, how far they appear from the text, and how often they appear. Click **OK**, then click **OK** again.

**Protect a Document:** Click the **File** tab, click the **Protect Document** button, and select **Mark as Final**. Click **OK** in both the confirmation dialog boxes.

**Password Protect a Document:** Click the **File** tab, click the **Protect Document** button, and select **Encrypt with Password**. Enter a password, click **OK**, then enter that password again to confirm it, and click **OK** again.

**Remove a Password:** Click the **File** tab, click the **Protect Document** button, select **Encrypt with Password**, remove the password from the text field and click **OK**.

**Inspect a Document:** Click the **File** tab, click the **Check for Issues** button, and select **Inspect Document**. Select the types of content you want to check for, then click **Inspect**. After inspection, click **Remove All** for any content that you want to remove, then click **Close**.

## Macros

**Enable the Developer Tab:** Before adding macros, you must enable the Developer tab on the ribbon. Click the **File** tab, click **Options**, click **Customize Ribbon**, check the **Developer** check box, and click **OK**.

**Record a Macro:** Click the **Developer** tab, click the **Record Macro** button, and give the macro a name. Click either **Button** or **Keyboard** to assign a button or keyboard shortcut to the new macro (optional). Click **OK**. Perform the tasks you want to record, then click the **Stop Recording** button.

**Run a Macro:** Place the text cursor where you want the macro to run. Click the **Developer** tab, click the **Macros** button, select a macro, and click **Run**.

**Edit a Macro:** Click the **Developer** tab, click the **Macros** button, select a macro, and click **Edit**. Modify the macro using the Visual Basic editor, then close Visual Basic.

## Advanced Documents

**Customize Word's Options:** Click the **File** tab and click **Options**. Select a category on the left, and then customize options on the right. Click **OK** when you're finished.

**Customize the Ribbon:** Click the **File** tab, click **Options**, then click the **Customize Ribbon** tab. Select and expand a ribbon tab, then select and expand a group. Select a command from the left column and click **Add** to add it. Select a command from the right column and click **Remove** to remove it from the ribbon.

## Advanced Documents

**Change Word's Default Font:** Start in a new, blank document. Click the **Font** group's dialog box launcher. Choose the new default font or font style, then click the **Set as Default** button. Select **All documents based on the Normal template**, then click **OK**.

**Create a Building Block:** Select the text or objects you want to use as a building block. Then, click the **Insert** tab, click the **Explore Quick Parts** button, and select **Save Selection to Quick Part Gallery**.

**Insert a Building Block:** Place the text cursor where you want a building block placed. Click the **Insert** tab, click the **Explore Quick Parts** button, and either select a building block from the menu, or select **Building Blocks Organizer**. Select a building block, and then click **Insert**.

**Find and Replace Using Wildcards:** Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. Check the **Use Wildcards** check box, then while entering a search phrase in the **Find What** field, click the **Special** button and select a wildcard.

### Wildcard Examples

?	any single character
*	any number of characters
[ ]	one of these characters
[ - ]	one of these characters in a range
[ ! ]	none of the specified characters
<	beginning of a word
>	end of a word
@	one or more instances of a character
{ n }	exactly <i>n</i> instances of a character
{ n, }	at least <i>n</i> instances of a character
{ n, m }	between <i>n</i> and <i>m</i> instances of a character

**Find and Replace Special Characters:** Click the **Find** button list arrow, select **Advanced Find**, and expand the dialog box by clicking the **More** button. While entering a search phrase in the **Find What** field, click the **Special** button and select a special character.

**Edit a Document in Multiple Languages:** Select the text in another language, click the **Review** tab, click the **Language** button, and select **Set Proofing Language**. Select a language and click **OK**.

**Add Additional Editing Languages:** Click the **Review** tab, click the **Language** button, and select **Language Preferences**. Click the **Add additional editing languages** list arrow and select a language. Click **Add**, then click **OK**.

**Insert a Date and Time Field:** Click the **Insert** tab, click the **Date and Time** button, select a date format, check the **Update Automatically** check box, and click **OK**.

## Advanced Documents

**Insert a Field:** Click the **Insert** tab, click the **Explore Quick Parts** button, and select **Field**. Select a field category, then a field. Click **OK**.

**View Field Codes:** Right-click a field and select **Toggle Field Codes**.

## Mail Merge

**1 – Start the Mail Merge Wizard:** Click the **Mailings** tab, click the **Start Mail Merge** button, and select **Step-by-Step Mail Merge Wizard**.

**2 – Choose a Document Type:** In the Mail Merge pane, select a document type, then click **Next**.

**3 – Select a Document:** In the Mail Merge pane, select whether to use the current document, start a new document from a template, or use another existing file, then click **Next**.

**4 – Select Recipients:** In the Mail Merge pane, select whether to use an existing list, select contacts from Outlook, or type a new list.

If using an existing list, click the **Browse** button, select a file with a list of recipients, and click **Open**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If selecting contacts from Outlook, click the **Choose Contacts Folder** button, select a contacts folder to import, and click **OK**. Select which contacts in the list you want to use by checking or unchecking them, then click **OK**.

If typing a new list, click the **Create** button, then fill out the fields for each address. Click **OK** when finished.

Click **Next**.

**5 – Write Your Letter:** Place the text cursor where you want an element, then click the button for the element you want to add (such as an **Address Block** or a **Greeting Line**), choose an element's options, then click **OK**. Or, click the **More Items** button, select a specific field to insert, click **Insert**, and then click **Close**. When you've added all the fields you need, click **Next**.

**6 – Preview Your Letter:** In the Mail Merge pane, click the << and >> buttons to preview the placeholders filled in with a recipient's data. When you're finished previewing, click **Next**.

**7 – Complete the Merge:** In the Mail Merge pane, click **Print** to print the finished mail merged documents, or click **Edit individual letters** to create a new document for all or some of the records.

Close the Mail Merge pane when you're finished with the merge.