

# Chapter 3

## Formatting a Document

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How do I apply bold, italic, and underlining attributes?

How do I use the Font dialog box?

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How do I add numbering and bullets to a list?

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### Chapter overview

In this chapter your students will learn how to use Word to improve the appearance of written documents. First they will explore how to make font changes—such as size, color, and text attributes—using the toolbars. Then they will learn how to make changes from the Font dialog box. Students will also learn how to change the text alignment and position as well as create bulleted and numbered lists. Students will learn how to adjust line spacing, use tabs, and indent text. Finally, students will learn how to add footnotes and endnotes, work with outlines, and create a table.

### Chapter outline

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How do I select different fonts, font sizes, and text colors?	29	Definitions of fonts and text attributes, how to change them with toolbar buttons
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How do I create a table?	40	Creating, formatting, and adding text to tables



## Technical notes

Your *Practical Office 2003* book includes an action-lacked **multimedia Book-on-CD**. Each page of the Book-on-CD looks exactly like its corresponding page in the printed book and contains interactive elements such as pop-up definitions, interactive animations, and interactive end-of-chapter material. The Book-on-CD is easy to use at home, at school, or at work. For more information on the Book-on-CD, please reference the preface of this book.

The following Materials Needed section is the same for each chapter of *The Practical Office 2003*. This information is repeated in each chapter for your convenience.

### Materials needed

**Windows 95, 98, Me, 2000, or XP installed on the lab computers.** *The Practical Office 2003* Book-on-CD is optimized for use with Windows 95, Windows 98, Windows Me, Windows 2000, and Windows XP. Note that *The Practical Office 2003* Book-on-CD will *not* work acceptably on computers installed with Windows 3.1.

**Tracking Disk.** You can have students create a Tracking Disk, which records their scores on the Skill Sets, so that you can monitor their progress. When you start a Skill Set, the program checks drive A: for a Tracking Disk. If you want to create a Tracking Disk, insert a formatted floppy disk, then click **Create Tracking File A:\TRACKING.TRK**. You'll be prompted to enter your name, student ID, and section number, all of which will be stored on the Tracking Disk. If you don't want to save your results, just click **Continue without a Tracking Disk**. This option allows you to try a Skill Set review without saving your results. For more information on the Tracking Disk, please reference the preface of this book.

**Project Disk.** For many of the projects, your students must create a Project Disk, onto which they copy project files and save their completed work. Students create their own Project Disk by inserting a blank, formatted floppy disk in drive A (or the appropriate drive), clicking Project Disk menu option on the Welcome screen of *The Practical Office 2003* CD-ROM, clicking the menu option for the assigned project, and then following the instructions to copy the project file to the blank floppy disk. A second method is to click the Copy It! button on the first page of the project to copy the file for that project to their floppy disk.

You can specify whether students submit the disk for your review, submit their printed completed project, or send you their completed file as an e-mail attachment. For e-mail submission, students will need your e-mail address.

This chapter assumes your students have access to a lab (or home) computer and have previously used a mouse.

**Content and Certification.** With the increasing presence and use of computers in both school curriculum and the workplace- there is a growing need to evaluate and measure computer skills through a set of certification standards. *Practical Office 2003* integrates computer concepts, Office applications, and Internet concepts making it the perfect solution for your introductory computer needs.



The content of the text and Book-on-CD maps to the certification standards for IC3 (Internet and Computing Core Certification). This certification is a set of 3 exam modules including: Computing Fundamentals, Key Applications, and Living Online.

Even if you don't use IC3 certification, *Practical Office 2003* is a good fit for many other certification standards developed by industry, your state, or your school. For more information on how *Practical Office 2003* can work with your course or for more information on certifications such as IC3 and ICDL, contact your Course Technology Sales Representative, or go to [www.course.com](http://www.course.com).



## Instructional notes

### Key terms

**bullet** (34): A special character to the left of an item in an unordered list.

**cell** (40): The intersection of each row and column.

**Centered text** (32): Text that is positioned between the margins. Most commonly used for titles.

**endnote** (38): Blocks of text or references to other documents appearing at the end of a section or chapter.

**font** (29): A design or typeface of each character, such as Arial, Times New Roman, and Gothic.

**footnote** (38): A numbered link of text that appears at the bottom of the page that contains the corresponding superscript number.

**format marks** (39): Hidden symbols that indicate paragraph breaks, spaces, and tab stops.

**hanging indent** (37): Indents the first line of text to the left of the rest of the paragraph. Most commonly used in a bibliography.

**Justified text** (32): Text that has both the left and right margins aligned.

**kerning** (31): The space between each letter.

**leader** (36): Used with a tab stop, prints a line of punctuation between the columns of text. Most often used in table of contents between heading and page number on each line.

**Left-aligned text** (32): Text that is positioned straight against the left margin.

**Right-aligned text** (32): Text that is positioned straight against the right margin.

**style** (33): Predefined formatting that can be applied to selected text.

**tab** (36): A specified distance in a line of text. Use the tab key to move text automatically to the specified tab location.

**table** (40): A grid consisting of rows and columns.

**text attributes** (29): Font styles such as bold, italic, and underlining.

### Lecture notes

#### *How do I select different fonts, font sizes, and text colors?*

Although Word's formatting capabilities will not disguise poor writing, a carefully organized and formatted document can increase the ease of readability (and accessibility) of the contents. Students should ask themselves the following questions when formatting a document:

■ ■ ■

- Who is the audience for this document?
- Is it formal or informal?
- Would lists be simpler to decipher than paragraphs?
- Would adding white space increase the readability of the document?

Discuss how the answers to each question affect the choice of font, size, and other formatting elements that students will learn in the coming pages. Lead a discussion about how font usage affects the look, mood, and readability of a document.

**TIP: An interesting demonstration is to take a nice looking page from a magazine and attempt to duplicate its layout and fonts using Word. To prepare this demonstration, it is suggested that you select a magazine page for which the fonts are known (look at the editorial information on the first few pages of the publication—many list the fonts they use). Make sure that an equivalent font exists on the computer you use for the demo. Type the text for the page using a standard Times New Roman font, and then apply different fonts, font sizes, and text colors during the demonstration.**

**TIP: Remind your students to use fonts sparingly (as a general rule, no more than three fonts per document). Point out that the variations available within each font (boldface, italic, colors, caps, lowercase) can provide an assortment of alternatives. Too many different fonts in one document can make the text look busy and difficult to read.**

**TIP: As a fun in-class activity, have students generate a document that formats their names or a simple phrase in a variety of fonts, sizes, and colors. Ask students to evaluate how the differences affect a reader's perception of the text. For example, a formal script font might indicate elegance, whereas a heavy sans serif type might indicate importance.**

**TIP: Have students create a font "cheat sheet" of the sentence "This is an example of...." Students fill in the sentence with a font name and then format that sentence with the font. For example: This is an example of Arial.**

### ***How do I apply bold, italic, and underlining attributes?***

Discuss appropriate use of bold, italic, and underlining attributes. All three attributes can be used to emphasize text within a document. However, point out that too much of any attribute can make text difficult read and have the same effect as normal text—no emphasis. Also mention that italics is often used in formatted documents to replace underlining, such as titles of books, plays, newspapers, and magazines.



**TIP: Remind your students that when formatting their documents, judicious use of the boldface, italic, and underlining attributes supply variations to text without overwhelming a reader.**

**TIP: Have students look at several pages from various books, magazines, newspapers, or Web pages and evaluate the use of bold, italic, and underlining attributes. Ask them to consider whether these attributes are used effectively, and explain their answers. Furthermore, have students mark up how they would add or remove these attributes to make the pages more effective.**

### ***How do I use the Font dialog box?***

The Font dialog box provides access to a host of text formatting attributes—both familiar and unfamiliar to students. Explain the different options available on each tab of the Font dialog box. Lead a discussion about when each attribute might be appropriate to use, in what kinds of documents, for which audiences, and so forth.

**TIP: As an in-class demonstration, display the Font dialog box and show students the various options. Select text in a document and then apply different formats. Discuss how each change affects the reader’s perception of the text.**

**TIP: As an in-class activity, give students a document of text and have them change the format. Compare the differences between student versions. Give them different audiences or purposes to reinforce the decision-making process. If students don’t have computer access, you can do this on a computer overhead and have the class make formatting decisions based on the stated document audience and purpose.**

### ***How do I center and align text?***

The alignment options provide the ability to create professional-looking documents in Word. Lead a discussion about when some of the alignment options might be appropriate to use. For example, centering is good for titles, right-aligned is good for dates and return addresses in letters, and justified text is good for paragraphs in a report. Point out that justified text can be difficult to read if the line length is short or the font size very big, leaving large spaces between words.

**TIP: Tell students to bring in several examples of pages from books, magazines, and newspapers. Have them to evaluate the documents for their use of alignment. Ask them to consider which pages look best and which read best.**

**TIP: As an in-class demonstration, display a document and then justify the text. Enlarge the text until large spaces appear between each word, making the document difficult to read. Point out to students how Word adds extra space between words to make the text on a line fill the space between margins.**

### *How do I use styles?*

Working with **styles** is a fairly advanced task, but they provide many advantages for maintaining a consistent format within long documents. Styles make it simple to update the look of a certain element. Students make a change only once and Word updates all paragraphs tagged with that style. Styles make it simple to format documents quickly. After saving the formats for a certain element as a style, students can apply the same style throughout their document without having to recall exactly what formats they used. See how many other advantages your students can think of.

**TIP: As an in-class demonstration, apply styles to a document with headings and subheadings. Then customize one of the styles to change its appearance and point out how it automatically updates other paragraphs tagged with that style—emphasizing the power of using styles. Finally, create a new style and then apply it to similar elements within the document—showing the speed of using styles**

Once students have created styles, they can save the styles list as a template. Then, they can simply and quickly create new documents with a consistent look. For example, they might use a template with custom styles to write various sections in a long report.

### *How do I add numbering and bullets to a list?*

Lists can help make certain paragraphs of information easier to comprehend. For example, a list of steps to complete or a series of available options would stand out and be simpler to follow if they were a numbered list and a bulleted list, respectively.

**TIP: Provide students with a variety of lists and have them determine whether the lists would be better as numbered lists or bulleted lists. Have them explain their reasons for choosing that type of list.**

Word comes with a variety of bullet styles to apply to lists. Show students some of the different types of bullets they might use. Talk about the reasons why they might select different types of bullet styles. For example, an open square indicates an item to complete as on a checklist whereas a check mark indicates a positive action.

**TIP: As an in-class demonstration, show students the process for creating and removing bulleted and numbered lists from paragraphs. Open the Bullets and**



**Numbering dialog box and point out the various bullets and number styles available. Demonstrate using the dialog box to create bulleted and numbered lists. Also show students how to set a custom bullet graphic, using Symbols or Wingdings.**

### *How do I adjust line spacing?*

Line spacing changes the amount of space that appears between each line in a paragraph. Adjusting line spacing can be used to create a special effect in a document or to make smaller text easier to read. Another common reason to use double- or even triple-spacing is when printing out a draft of a report. The extra space between lines provides ample room to handwrite corrections, changes, and notes.

**TIP: Remind students about the word wrap feature. Rather than pressing the Enter key twice at the end of each line to create double-spacing, they should allow word wrap to determine the line length and then adjust the line spacing in the Paragraph dialog box. This way, the paragraph lines will rewrap to accommodate any edits they make to the text.**

### *How do I use tabs?*

**Tabs** are often a difficult concept for students to grasp. Discuss how tabs enable you to specify exactly where text moves on the line. As an example, show columns of information and point out that tabs enable them to align the text precisely (unlike the spacebar, which doesn't align text precisely and makes text difficult to edit). Review the various elements involved in setting a tab—tabs, tab stops, styles of tab stops, and so forth. The tab indicates which text will move. The tab stop indicates to where the text will move. The tab stop style indicates how the text will be aligned from the tab stop.

**TIP: Tab settings can be made using the ruler bar or the Tabs dialog box. Although the ruler bar seems the most obvious choice, for many students it is the more difficult method because of the small size of the tab icons. The authors have, therefore, presented both methods for setting tabs, but recommend that beginners—especially those with modest mouse skills—stick to the Tabs dialog box.**

**TIP: As an in-class demonstration, show students how to set tabs using both the Tabs dialog box and the ruler.**

**TIP: Students often find it helpful to see one document that shows examples of all the tab styles. Create five columns of text using tabs: the first showing a left tab, the second showing a center tab, the third showing a right tab, the fourth showing a**



**decimal tab, and the fifth showing a bar tab. Enter several lines of text for each tab, using words or phrases with a variety of character lengths or numbers with a variety of decimals. The following is one example:**

Left tab	Center tab	Right tab	Decimal tab	Bar tab
Here's an example of a left tab	Here's an example of a center tab	Here's an example of a right tab	123.45 4939484.30384 34	

**Discuss with students the purpose and benefits of each type of tab. Ask them to list as many uses for each as they can.**

You might also point out to students that they can move tabs after they set them. Show them how to drag the appropriate tab stop along the ruler to the new location they want. Tabs stops can also be dragged from the ruler to remove them. The easiest way to remove multiple tabs is to select the text with tabs stops to remove, and then click the Clear All button in the Tabs dialog box.

### ***How do I indent text?***

Students are usually familiar with the idea of a first-line indent, as they see it in most books, magazines, and newspapers they read. They may not be as familiar with other types of indents. A left indent moves the entire paragraph away from the left margin. A right indent moves the entire paragraph away from the right margin. A **hanging indent** is the inverse of a first-line indent—the first line remains at the margin and all subsequent lines in the paragraph move away from the left margin.

**TIP: Students often find it helpful to see one document that shows examples of different indents. Type a five-line paragraph in a document and then copy the paragraph five times. Format the five paragraphs as follows:**

- 1. no indents**
- 2. first line indent**
- 3. left indent**
- 4. right indent**
- 5. hanging indent**

**TIP: Lead a discussion about various uses for indents. See how many your students can think of. Some examples are: paragraphs in a report (first line); lists (left indent); extracts or quotations in a report (left or right indents or both); bibliography (hanging indent).**

**TIP: Ask students to create a document “from scratch” that includes specific attributes, such as boldface, three fonts, a numbered list, and so forth. Give them a specific**

**type of document (such as a flyer, a newsletter, or a menu) and a theme (such as circus coming to town or family reunion picnic) to get their creative juices flowing.**

### *How do I add footnote or endnotes to a document?*

Students are very familiar with **footnotes** and **endnotes**, as they are in many of their textbooks. Footnotes appear at the bottom of the page. Endnotes appear at the end of a section. Remind students that you don't often see both footnotes and endnotes in the same piece of work.

**TIP:** Have the students bring in two different publications, one with footnotes and one with endnotes. Lead a discussion about the various uses for both endnotes and footnotes. Have students share what they have found useful in their books with endnotes and footnotes.

### *How do I work with outlines and other document views?*

Discuss the various views available to Word.

Print Layout View shows you what the document will look like printed.

Web Layout View shows you what the document will look like as a Web page.

Outline View shows you what the document as an outline.

Reading Layout View shows you the document with embedded comments and revision marks.

**TIP:** Demonstrate the various Views by showing your students how one document can change by simply choosing a different view. Have a discussion with your students on why each view is helpful. Spend time reviewing the Outline View with your class.

### *How do I create a table?*

Students often find the process of creating a **table** intimidating. However, tables provide great flexibility in entering columns of text and often are easier to create and edit than columnar text separated by tabs. Suggest that students begin by planning their tables. They might even want to sketch the table on paper before creating it on the computer. This way, they can avoid excessive modification of tables.

**TIP: Demonstrate the process of creating a table. Insert a simple table, add text, and format it appropriately. Then show students how easy it is to insert a new column, delete a row, and adjust a column width. Follow up by giving students several tables to create and modify—such as a table of products and prices, a table of their class schedules, and a table for the current month’s calendar.**

Also consider discussing the use of the process for converting existing text to a table. Mention when students might encounter this need—using data from a database, receiving columnar data from others, etc.

**TIP: Demonstrate the process of converting existing text to a table. Use examples of text separated by tabs, commas, and even a custom symbol (for example, an asterisk). Show your students how quickly they can make a messy set of data into a neatly formatted table.**

Word’s table feature is quite important given the state of Web page design. Tables provide one of the most reliable ways to position text and graphics on a Web page. You might want to point out this fact as motivation for students to master tables.

**TIP: Demonstrate the process of creating a table that includes text and graphics for a Web page. You can combine this demo with one of saving documents as Web pages.**

## Solutions to QuickChecks

### Solutions to QuickCheck

1. Select All
2. paragraph
3. Font



4. bullet
5. F (False)

### Solutions to QuickCheck **B**

1. D
2. B
3. E
4. G
5. H