LEARNING MADE EASY

2nd Edition

Microsoft® 365 Word® For Professionals

for dummies®

A Wiley Brand

- Apply advanced Word features and save time
- Create complex documents with ease
- Use Word effectively for your professional needs

Dan Gookin

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Microsoft® 365 Word® For Professionals

2nd Edition

by Dan Gookin

for dummies®
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Microsoft® 365 Word® For Professionals For Dummies®, 2nd Edition

Published by: **John Wiley & Sons, Inc.,** 111 River Street, Hoboken, NJ 07030-5774, www.wiley.com

Published simultaneously in Canada

Library of Congress Control Number: 2025934400

ISBN 978-1-394-32386-9 (pbk); ISBN 978-1-394-32388-3 (ebk); ISBN 978-1-394-32387-6 (ebk)

Contents at a Glance

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Introduction

Welcome to *Microsoft 365 Word For Professionals For Dummies*, a clever name given to a book that's really about oppressed workers in Asia who hand-place sesame seeds on hamburger buns. I'm not serious, of course. I'm just checking to see whether you're actually reading this introduction.

This book goes way beyond the beginner's user level when it comes to word processing with Microsoft Word. The subject matter isn't technical but rather geared toward professionals or anyone who is serious about the words they write. Microsoft Word is a powerful program, and few people venture into its more sophisticated levels. That's sad because many of Word's features can save you time and help you create a better document.

About This Book

Are you still reading the introduction? That's really weird. Most people don't even bother. In fact, they take the copy of this book that they illegally downloaded, grab the information they want, and then go on Facebook and lament how the economy is crumbling. I love that story.

Still, I'm proud of you for continuing to read this introduction. Truly, it's the best part of the book. That's because this is where I explain how this book covers a lot of material not found anywhere else. Google? Forget it. I've looked. The people (or robots) who put "help" up on Google don't know what they're talking about. If you really want to understand Word and create outstanding documents, you have the best resource in your hands right now.

This book is a reference. It's designed to cover a topic quickly and let you get back to work. Each chapter covers a topic, and major sections within the chapter go into detail. Within each section are specific activities, complete with steps or further instructions that help you accomplish a task. Sample sections in this book include

- Adding a text shadow
- Splitting a table between two pages

- Wrapping text around an object
- Opening an Excel worksheet inside of Word
- Creating a PDF
- Setting text-editing restrictions
- Marketing your eBooks
- Creating an AutoText building block
- Recording a macro

The topics covered are vast, but you don't have anything to memorize. Information is cross-referenced. Technical tidbits are carefully shoved to the end of a section or enclosed in a box. Though it would be great to master all that Word offers, my sense is that you prefer to find out only what you need to know and then get back to your work.

Foolish Assumptions

This book assumes that you have a basic knowledge of Word. You know how the program works, and you've created crude and ugly documents. Perhaps you didn't believe them to be crude and ugly, but they are. And that's why you purchased this book, because you want to create more professional, respectable documents.

You are using Microsoft 365, which is an online subscription service that includes the Microsoft Word application. The text also applies to older versions of Word, though some of the command names and icons have changed. In fact, as Microsoft 365 is continuously updated, some of the material in this book may not match exactly what you see on the screen.

This book mentions the Copilot artificial intelligence (AI) tool that adds certain features to Word. Obtaining Copilot requires an additional subscription. Where Copilot affects Word and can improve your writing is covered throughout this book.

This book does not cover Word for the Macintosh. If you see an Apple logo on your computer, I can't promise that anything in this text applies to your computer setup.

If you need more basic information on Word, I can recommend *Microsoft Word For Dummies* (Wiley). That book covers material deemed too basic or common for this book, though it's still good material. For example, that book covers mail merge, which this book shuns like that steaming pan of gray goo at the back of an all-you-can-eat five-dollar buffet.

Icons Used in This Book

Festooning this book's pages are icons. These consist of the traditional four *For Dummies* margin icons. They are:

This icon flags a useful suggestion or kindhearted tip. I'd like to think of all text in this book as a tip, but my editor dislikes it when I overuse the Tip icon. So only the very bestest tips are flagged.

This icon appears by text that gives you a friendly reminder to do something, to not forget something, or to do something else, which I don't recall at the moment.

This icon highlights things you're not supposed to do, like try to put sheet metal into a computer printer. That sounds cool, but if you really want a document to shine, I have better advice.

This icon alerts you to information you can happily avoid reading. I use it to flag parts of the text where I get technical, go off on a tangent, or mention material that's not really necessary to the topic, but my inner nerd just can't control himself. Feel free to avoid anything flagged with the Technical Stuff icon.

Along with the icons, you'll find margin art. These marginal masterpieces represent various items you see on the screen while using Word. They might be command buttons, doodads, controls, gizmos, or flecks of paint that look interesting. These micons (margin icons) help you navigate through steps in the text.

Beyond the Book

My email address is `dgookin@wambooli.com`. Yes, that's my real address. I reply to all email I receive regarding this book, and you get a quick reply if you keep your question short and specific. Although I enjoy saying Hi, I cannot answer technical support questions or help you troubleshoot your computer. Thanks for understanding.

You can also visit my web page for more information or as a diversion:

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wambooli.com
```

I also have a vast collection of videos on YouTube that cover using Microsoft Word and that offer various tricks and tips. Check them out at:

```
youtube.com/@dangookin
```

As part of my contractual obligation, I'm required to mention the publisher's page, where you can find more information including this book's secret "Cheat Sheet":

```
dummies.com
```

Search for this book's title (*Microsoft 365 Word For Professionals For Dummies*) on that site to locate the Cheat Sheet. (They keep moving it, so searching is your best bet.)

Where to Go from Here

The first thing you need to do is stop reading the introduction. I'm serious: It's over. The book's vast pages await a bright reading light and your eager gaze.

Check out the table of contents and see what interests you. Peruse the index and look up a special topic. Or just flip to a page and become enlightened. Word does so much and offers so many tools to help you make better documents that you can truly start anywhere.

Enjoy this book. And enjoy Word as much as you can stand it.

1 Fancy Formatting and Froufrou

IN THIS PART . . .

Discover how to best use fonts.

Get to know about page formatting.

Work with tables and information in a grid.

Apply informative headers and footers to a document.

Use styles to quickly format text.

Get familiar with templates, and start creating documents quickly.

IN THIS CHAPTER

- Understanding fonts
- Using typefaces appropriately
- Setting text scale and spacing
- Raising or lowering text
- Applying fun text effects
- Filling a font with color
- Enhancing headings with shadows

Chapter 1
Font Fun

I blame the Macintosh for computer users' infatuation with fonts. The Font menu appeared in the early MacPaint and MacWrite programs. It listed a variety of what are more properly termed *typefaces.* But a *font* is really a combination of typeface, size, style, and other attributes. Regardless, the term *font* has stuck. In Word, plenty of options are available to manipulate and preset a font on the page.

A Knowledge of Fonts

Font selection may seem to be secondary to the contents of the document's text. Even so, selecting a proper font is important for readability and presentation. Here are a few general items to understand about fonts before digging into the dirty details.

» Fonts are installed into Windows, not Word. In Windows 11, use the Settings app, Personalization screen, to find and manage fonts. In Windows 10,

you use the Control Panel and choose the Appearance and Personalization category. Click the Fonts heading to view installed fonts.

» Many fonts are shown as available in Word but must be downloaded to be used. Downloading takes place automatically when you apply the font.

Describing text

Do you remember when you learned to write? Your teacher handed out *ruled* paper. You copied letters and words and used the rules (lines) as a guide. These rules come from the history of printed text, where everything has a name and a purpose, as shown in Figure 1-1.

FIGURE 1-1: Text essentials.

As you progress through school and into the workplace, only the baseline remains as a guide, though the other lines still exist in the world of fonts. They're relevant in typesetting — and in Word. Here are descriptions of the text measurements illustrated in Figure 1-1:

Baseline: Text is written on the baseline.

Cap height: Capital letters extend from the baseline to the cap height.

X-height: Most lowercase letters rise to the x-height, which is named after the lowercase letter *x* and not anything mysterious.

Ascender: Taller lowercase letters extend to the ascender line, such as the *t* shown in Figure 1-1.

Descender: Lowercase letters that dip below the baseline drop to the descender line.

The purpose of these lines is consistency. Though fonts have different character shapes and sizes, these rules help the reader absorb the text. When fonts disobey the rules, the text becomes more difficult to read.

TECHNICAL STUFF

- In the typesetting community, uppercase letters are known as *majuscule*. Lowercase letters are *miniscule*.
- The reason uppercase and lowercase letters are given these names dates to the printing press. Majuscule letters were kept in the top or upper part of a case; miniscule letters were kept in the lower part.

Understanding text attributes

A font has many attributes to define the way the font looks and how it can be best put to use. Many of the font attributes are related to Word's text formatting commands. Here's the Big Picture:

Typeface: The font name is called the *typeface*. In Word, the font "Times New Roman" is really a typeface. Only when coupled with other attributes does it officially become a font.

Serif/sans serif: These are the two styles of typeface. A *serif* is a decoration added to each character, a small line or embellishment. Serifs make text easier to read, so serif typefaces are preferred for body text. *Sans serif* typefaces lack the decorations and are preferred for document titles and headings. Figure 1-2 illustrates serif and sans serif typefaces.

Times New Roman

Serif typeface, proportional

Helvetica Neue

Sans serif typeface, proportional

Courier New

Serif typeface, monospaced

FIGURE 1-2: Typefaces of differing styles.

Proportional/monospaced: A proportionally spaced typeface uses different sized letters, so a little *I* and a big *M* are different widths. A monospaced typeface features letters all the same width, as you'd find on a typewriter. Figure 1-2 illustrates both proportional and monospace typefaces.

Size: Typeface size is measured in *points*, or units equal to $\frac{1}{72}$ of an inch. So, a typeface 72 points tall is 1 inch tall. The measurement is made from the typeface's descender line to its cap height (refer to Figure 1-1).

Weight: The weight value is either part of the typeface itself or added as an effect, such as the bold text attribute. But for many fonts, the weight is selected with the typeface, as shown in Figure 1-3.

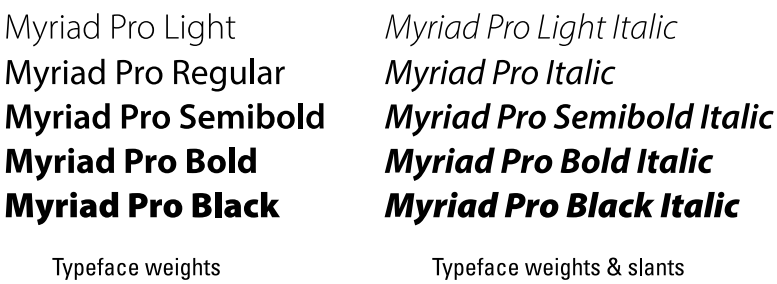

FIGURE 1-3: Typefaces of differing weights and slants.

Slant or slope: A typeface's slope refers to how the text is angled. The most common slope is italic. Oblique text is similar to italic, but subtler. The slant can also tilt to the left, which is more of a text effect than anything you'll commonly see associated with a typeface.

Width: Many typefaces feature condensed or narrow variations. These fonts include the same basic design, but the text looks thin or skinny.

Effects: Effects have little to do with the typeface. They are applied by Word to add emphasis or just to look cool. See the later section "Text Effects Strange and Wonderful."

Text on a line can be manipulated to change the way it looks. For example, tracking can be adjusted to scrunch up characters on a line of text. Kerning can be applied to bring letters closer together. Later sections in this chapter describe the details.

REMEMBER

» A font is a collection of text attributes. What the computer industry calls a "font" is really a typeface.

- Text is also measured from side to side. The yardstick that's used is the width of the big *M.* That measurement is called an *em.* In digital typefaces, the *em square* is a box used for designing typefaces.
- Font width varies depending on the font's design, whether the font is heavily weighted, and whether the font is proportionally spaced or monospaced. See the next section for details on these terms.
- Proportionally spaced typefaces are easier to read than monospace.


TIP

- Select a heavy typeface over applying the bold text format. Word may select the heavy typeface automatically when you set the bold attribute. The result is that the heavy typeface looks better than when Word attempts to make text look bold.
- Other typeface weights, not shown in Figure 1-3, include Book, Roman, and Heavy. Still other variations might be available, depending on how the font is designed and named.
- Just as you should choose a heavy typeface instead of applying the bold text format, if an italic or oblique typeface is available, use it instead of applying the italic text format. See the next section.

Choosing the best typeface

The general rule for text design is to use sans serif fonts for titles and headings and use serif fonts for document text. Like all rules, this one is broken frequently and deliberately. Even in Word, the default document theme uses sans serif Calibri as both the body text and headings typeface.

If you have trouble choosing fonts, take advantage of the Design tab's document themes in Word. Follow these steps:

1. **Click the Design tab.**
2. **In the Document Formatting group, select a theme.**

   Each theme combines typeface elements with colors and other tidbits to help your document maintain its overall appearance.

As you point the mouse at various themes, the document's text updates to reflect the theme's attributes.

- Choosing a new document theme is optional. You can always create your own document styles to set heading and body typefaces.

TECHNICAL STUFF

COMPUTER FONT STANDARDS

Beyond typeface and other typographical nonsense, a few digital standards rule the world of computer fonts. These standards are TrueType and OpenType.

TrueType is a digital font standard created by Apple and Microsoft. It was designed to compete with Adobe's PostScript fonts, which rendered better on the computer screen back in the early 1990s. OpenType is the successor to TrueType, which was developed in the late 1990s.

To determine which font is which, open the Font dialog box by pressing the Ctrl+D keyboard shortcut. Choose a font, and its type is confirmed below the Preview window.

Other fonts are stirred into the mix and flagged as non-TrueType in Word. These fonts may not look as good as TrueType/OpenType fonts. You may also find that some of Word's advanced text-effect commands don't apply to non-TrueType/OpenType fonts.

WARNING

- Avoid using decorative or ornamental typefaces as your document's text. They look nifty but make reading difficult.
- A *scripted* typeface looks handwritten, and you might feel it adds a personal touch. For a short note, an invitation, or a thank-you card, that typeface works well. For a long document, however, a scripted typeface hinders readability.

Dashing about

One character on the keyboard specifically has a role when it comes to understanding fonts. It's the lowly hyphen. This character is used to hyphenate words, to set a range (as in pages 15–16), and stands in for the minus sign in mathematical equations. The hyphen has two siblings that are based on the font size.

The em dash. A dash equal in width to the *M* character is called an *em dash*. In Word, the keyboard shortcut Ctrl+Alt+(hyphen) produces an em-dash character, where the hyphen key is on the numeric keypad.

The en dash. A dash equal in width to the letter *N* is an *en dash*. Its keyboard shortcut is Alt+Shift+(hyphen), where the hyphen key is on the numeric keypad.

The *hyphen* character itself is shorter than the en dash, but sharp-eyed typesetters (and editors) spy the difference. In modern typefaces, the em dash is the width of the uppercase M character. The en is equal in width to the uppercase *N*.

- The em dash is used to create a parenthetical clause or as a replacement for the colon. En dashes are preferred by editors to set a range or use connections, as in topsy-turvy.
- Word automatically converts a hyphen separated by spaces into an en dash. This change is part of Word's AutoCorrect feature.
- The AutoFormat feature converts two hyphens together -- into an em dash.
- Violent clashes erupt between copy editors over whether to add spaces to either side of the em dash. The current victors believe no spaces should cushion the ends of the em dash. These people are incorrect and will eventually be punished.

Typography Control

Word offers some typeface options that let you manipulate the typeface in degrees beyond standard text attributes. These modifications reset text size, spacing, and position — options not normally available in a standard word processor.

Changing text scale

The Scale command changes the text size in a horizontal direction. This increase is different from the *point size,* which sets the typeface's overall size. Use the Scale command to fatten or thin your text, making it wider or narrower, say for a heading or other text decoration that draws attention.

To adjust the width of a chunk of text, obey these directions:

1. **Select the chunk of text to modify.**
2. **Press Ctrl+D.**
3. **Click the Advanced tab in the Font dialog box.**
4. **From the Scale menu, choose a percentage or type a specific value.**

   The larger the percentage, the wider each character becomes.

   
   TIP

   Use the Preview box in the Font dialog box to get a sense of how the command affects the selected text (from Step 1).
5. **Click OK.**

   The new width is applied to your text.

Figure 1-4 illustrates the effect of changing the text scale. For each scale percentage, note that the text *height* (size in points) remains the same. Only the text width changes.

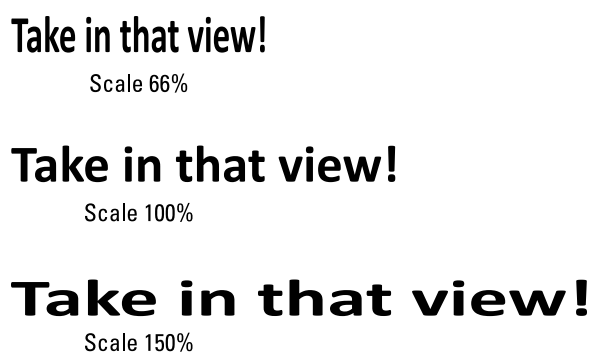

FIGURE 1-4: Examples of text scale.

REMEMBER

- If the typeface offers a Narrow or Wide variation, use it rather than the Scale command.
- Some typefaces don't scale well at the larger end of the spectrum. You must decide whether a scaled typeface is worth any ugliness generated by the effect.

Setting character spacing

You probably don't think about the spacing between characters, which is exactly what a typeface designer wants. Despite all their talent and effort, Word lets you override the decisions of a typeface designer and reset the amount of space between characters. Obey these steps:

1. **Select the text you want to expand or condense.**
2. **Press Ctrl+D to bring up the Font dialog box.**
3. **Click the Advanced tab.**
4. **From the Spacing menu, choose Expanded or Condensed to increase or reduce the space between letters in the selected text.**
5. **Manipulate the By gizmo to set how wide or narrow to set the spaces between letters.**

   Use the Preview box to see how the settings affect the selected text.
6. **Click OK to set the character spacing.**