# **DOCUMENT DESIGN TOOLS**

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Microsoft Word contains a number of tools and features that make it easier for you design and layout documents in a quick and consistent manner. These tools, once mastered and in some cases setup, will allow you to create new documents with much of the formatting and layout in place, place pre-existing text in desired locations, and control formatting throughout the entire document.

### In this session you will:

- gain an understanding of themes
- learn how to apply a theme to your document
- ✓ learn how to modify theme colours
- ✓ learn how to modify theme fonts
- ✓ gain an understanding of character and paragraph styles
- ✓ learn how to apply styles to paragraphs
- ✓ learn how to apply character formatting to text
- learn how to create quick styles
- learn how to create paragraph styles
- learn how to create character styles
- gain an understanding of templates
- ✓ learn how to use a sample template
- ✓ learn how to download an online template
- learn how to create a template
- ✓ learn how to modify a template
- ✓ learn how to attach a template to a document
- ✓ learn how to copy styles between templates
- ✓ gain an understanding of template development
- gain an understanding of building blocks
- $\checkmark$  learn how to insert a building block
- ✓ learn how to create **Quick Parts**
- ✓ learn how to save building blocks
- ✓ learn how to insert Quick Parts
- ✓ learn how to edit Quick Parts
- ✓ learn how to save building blocks to a template
- ✓ gain an understanding of the differences between AutoText and Quick Parts.

### **UNDERSTANDING THEMES**

One of the major design aims of Word 2010 is to provide users with simple tools for creating professional, high-quality documents. *Themes* will help you do this. With a single mouse click, you can select a theme that will apply the work of professional designers to your document. What's more, you can use the same theme in other Office applications, like PowerPoint.

### What Is A Theme?

A *theme* is a coordinated set of colours, styles and effects that enable you to create well-designed and professional-looking documents in just a single click! Each theme includes a set of theme *colours*, theme *fonts* (such as heading styles and body text fonts) and theme *effects* (which apply a pre-chosen set of line, fill and special effects to your inserted charts, SmartArt graphics, shapes and pictures).

Every document has an underlying theme. For example, a new blank document has the *Office* theme applied to it by default. This means that every element of your new document – be it the text you insert or a style you apply to an inserted table or picture – is controlled by a theme.

Word 2010 includes 40 in-built themes in the *Themes* gallery. But, if you need more, you can modify existing themes to create new ones or download additional themes from Microsoft Office Online.

Staff Induction Information Pack	Staff Induction Information Pack
Department:	Department:
Position:	Position:
Welcome to BDEDU. You'll find everything you need to know in this Staff induction information Pack. Complete the checklist, work through the recommended online training, and then sign off your induction program with your supervisor.	Welcome to BDEDU. You'll find everything you need to know in this Staff Induction Information Pack. Complete the checklist, work through the recommended online training, and then sign off your induction program with your supervisor.
Incident and Hazard Reporting incidents, accidents and hazard's are those situations or combinations of events that may lead, or have led, to personal injury or damage to property. This includes' near-miss' events or anything that any staff member identifies as a potential problem. Management realise that only the incumbents truly understand the effect situations and environment three on their personal role and gratty respectand expectfeedback in this area. Any incidents or hazards must be reported initially to your supervisor who will complete an incident or reazer form on-line with you.	Incident and Hazard Reporting Incidents, accidents and hazards are those situations or combinations of events that may lead, or have led, to personal injury or damage to property. This includes 'n ear-miss' events or anything that any staff member identifies as a potential problem. Management realise that only the incumbents truly understand the effect situations and environment thave on their personal role and greatly respect and expect feedback in this area. Any incidents or hazards must be reported initially to your supervisor who will complete an Incident or Hazard Form on-line with you.
Reporting Telephone Faults Telephone faults must be reported to the Voice Communication Department, either on 176584 or by email to telephonefaults@vcditbdedu.gov.Faults may include:	Reporting Telephone Faults Telephone faults must be reported to the Voice Communication Department, either on 176584 or by email to telephonefaults@vcl.it.bdedu.gov. Faults may include:
Crackling on lines     Phones unable to make calls     Phones unable to make calls     Phones unable to make calls     Inability to access voice mail     No dial forms     Any problems with handsets including breakages     Workstation Ergonomics     Inity through incorrect use of workstations is is common problem in office-based positions.     Occupational Overvaes Synchrome can be avoided through altherence to strict ergonomic publiclines.     Please complete are Ergonomic Reviewform with your supervise before commencing dury.     Our problems with eleview form with your supervise before commencing target.     Our problems beside through altherence to strict ergonomic publiclines.     Please complete are Ergonomic Reviewfort S3500-1590 Screen based workstations, and 2 workstation     furniture. A useful website covering all workstation safety issues is located at     thr/Invova Eleviewformultings	Crackling on lines     Phones unable to receive calls     Phones unable to make calls     Inability to access voice mail     No dial tones     No dial tones     Any problems with handsets including breakages     Workstation Ergonomics     Injury through incorrect use of workstations is a common problem in office-based positions.     Occupational Oversus Syndrome can be avoided through adherence to strict ergonomic     guidelines. Pleasecomplete an Ergonomic Review form with your supervisor before     commencing duty. Our policy is based on <i>Australian Strandard AS 3300 - 1390 Screen based     workstations, part a workstation furniture</i> . A useful website covering all workstation safet     issues is located at http://www.pci.hmc.on/ww/healthwomputins.

In just three clicks, this document has been transformed by applying a theme...

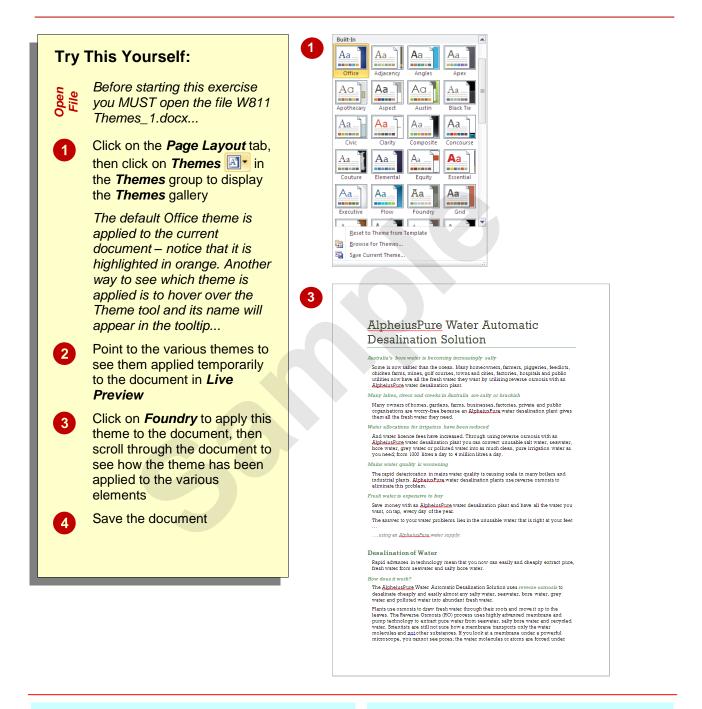
### Why Use Themes?

There are several advantages to using themes:

- Instead of spending copious amounts of time formatting every aspect of your document, such as styles, page layout, formatting and the rest, graphic designers have done the work for you. By choosing a theme, you can create professional, high-quality documents with a coordinated set of colours, fonts and backgrounds.
- The 40 built-in themes are also available in other Office applications like Excel and PowerPoint. This means that you can maintain a consistent look, if desired, across all of your organisational documents. For example, you can create your annual report with a similar design to your brochures, your monthly newsletters, your year-end financials, your presentation to the Board, and your website.
- Themes can be applied to Word's range of built-in templates.

# **APPLYING A THEME**

Microsoft Word 2010 provides 40 built-in themes which are available in the *Themes* gallery. Each theme has been carefully designed so that the fonts, styles, colours and formatting complement each other to create professional-looking and welldesigned documents. Themes can be applied to an existing document in just a couple of clicks!



### For Your Reference...

To *apply* a *theme* to a document:

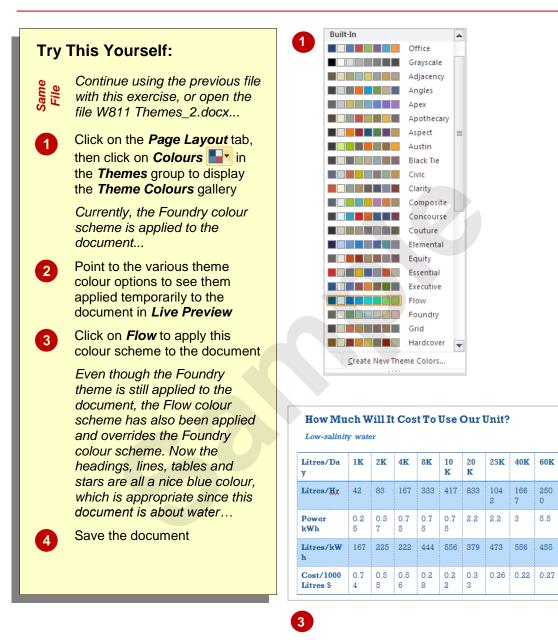
- 1. Click on the Page Layout tab
- 2. Click on *Themes* **⊡** in the *Themes* group to display the *Themes* gallery
- 3. Click on the desired theme

#### Handy to Know...

 You can apply a theme to a document that is applied to another document or file. To do this, click on the *Page Layout* tab, then click on *Themes* and select <u>Browse for Themes</u>. Navigate to the file, select it and click on [Open]. The theme applied to that file will also be applied to the current document.

# **MODIFYING THEME COLOURS**

For each theme, designers have selected 12 *colours* that complement each other. These include light-coloured text with a dark background (and vice versa), six accent colours for charts, tables and other inserted objects, plus two colours for hyperlinks. Once you have applied a theme, you can easily apply a different colour scheme to the current theme.



### For Your Reference...

To modify theme colours:

- 1. Click on the Page Layout tab
- 2. Click on *Colours* **I** in the *Themes* group
- 3. Click on the desired theme colour option

### Handy to Know...

 To create and save custom colour schemes to the *Themes Colour* gallery, click on *Colours* in the *Themes* group and select <u>Create New Theme Colours</u>. Select the range of desired colours in the *Create New Theme Colours* dialog box, type a *Name* and click on [Save].

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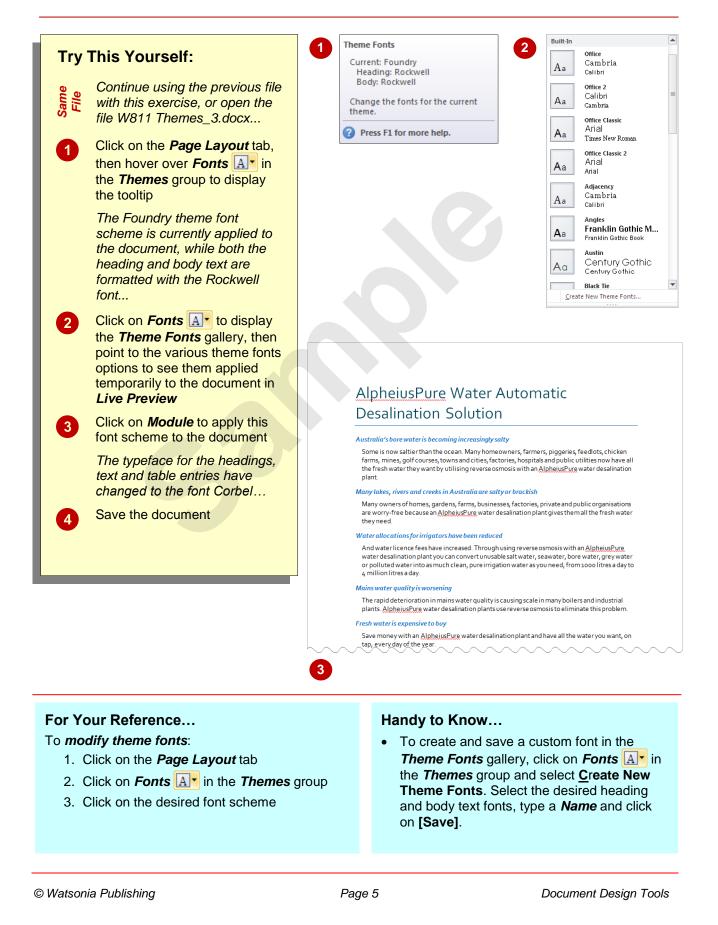
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# **MODIFYING THEME FONTS**

Professional designers at Microsoft have spent time working out which groups of fonts work well together and have saved these in the *Theme Fonts* gallery. If you want to change the fonts used in your document, a quick way to achieve this is to select a theme font. Using *Live Preview*, you can see at a glance which theme fonts work best for your document.



### **UNDERSTANDING STYLES**

To ensure a consistent and professional look and feel across your documents, and to save time in document production, use *styles*. A style is a set of stored formatting attributes that can be applied

to text in a single click. Rather than applying the same formatting to text throughout a document over and over, you can apply a style that already contains the required formatting.

### What Is A Style?

A *style* is a stored set of character and paragraph formatting attributes that can be applied to selected text. For example, you may want all of the department names mentioned in your document to appear in Garamond 16 point, bold. Rather than manually select each department name and apply the font style and size to each selection, you can create a style that contains the required formatting, save that style and then apply the style to the selected text.

As well as defining your own styles, Microsoft provides a large number of styles that you can use to apply formatting. To ensure that some of the more common styles are accessible, Microsoft has grouped related *quick styles* into *quick style sets* and these are displayed in the *Quick Styles gallery* on the *Home* tab of the Ribbon. A *Quick Style set* is a collection of the main styles that may be needed for a document – such as different heading levels and emphasising styles – which have been carefully designed to work well together when used within the one document.

Using styles consistently provides two benefits. First, it ensures that all similar items in a document are formatted in the same way. Second, if you need to change the appearance of a particular style, you can do so very easily, and everything formatted with that style will change immediately throughout the entire document.

### **Paragraph Versus Character Styles**

**Paragraph styles** control all of the characteristics of a paragraph such as alignment, spacing and all of the settings that are included in the **Paragraph** dialog box. Paragraph styles can also determine bullets and numbering, borders and shading, and tab settings.

Paragraph styles also define the default character formatting for all characters within the paragraph. For example, you might define a new paragraph style called **Note** that specifies left-aligned paragraphs with 12 point spacing before, and with Calibri 12 point, bold, red characters. All text in a paragraph formatted with the **Note** style will appear as specified unless you manually format the text or apply a different character style to the text.

*Character styles* are similar to paragraph styles except that they only specify character formatting thereby they can be applied to a single word rather than the entire paragraph. Character styles include the font, font size and style, colour and the other settings that are included in the *Font* dialog box.

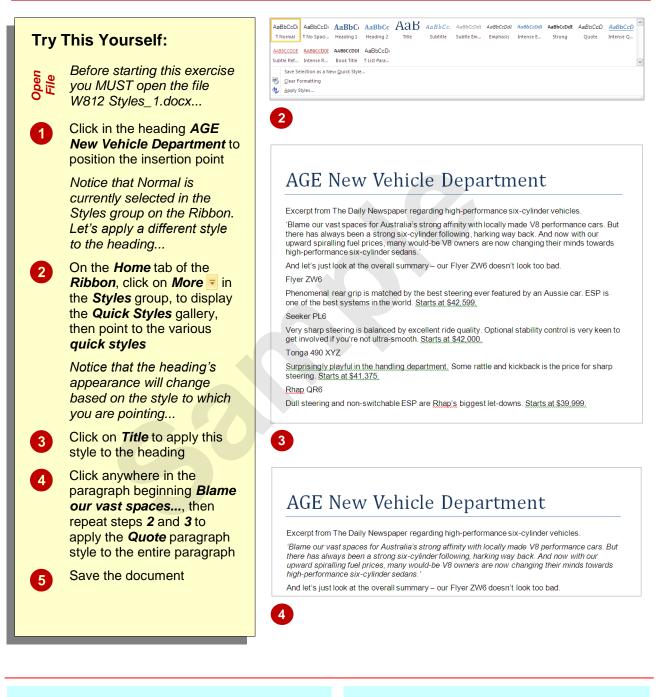
### The Hierarchical Order Of Styles

With Microsoft Word, there is a strict hierarchy to character formatting as is shown in the following example:

The quick brown fox jumps over the fence	The entire sentence has the <i>Normal</i> paragraph style applied to it (Arial 9 pt).
The <b>quick brown fox</b> jumps over the fence	The words 'quick brown fox' have the character style <b>Fox</b> applied to them (Britannic Bold, 10 pt, bold, purple). This style overrides the paragraph style.
The quick BROWN fox jumps over the fence	The word 'brown' has then been manually formatted (small caps, italics, 11 pt). This manual formatting overrides both the character and paragraph styles.

# **APPLYING PARAGRAPH STYLES**

Word provides many built-in paragraph and character styles, known as *quick styles*. You can access any quick style via the *Styles* group on the *Home* tab. Each quick style is actually a set of styles, called a *quick style set*, where each quick style set may include heading styles, bullet styles and the like.



### For Your Reference...

To apply a quick style to a paragraph:

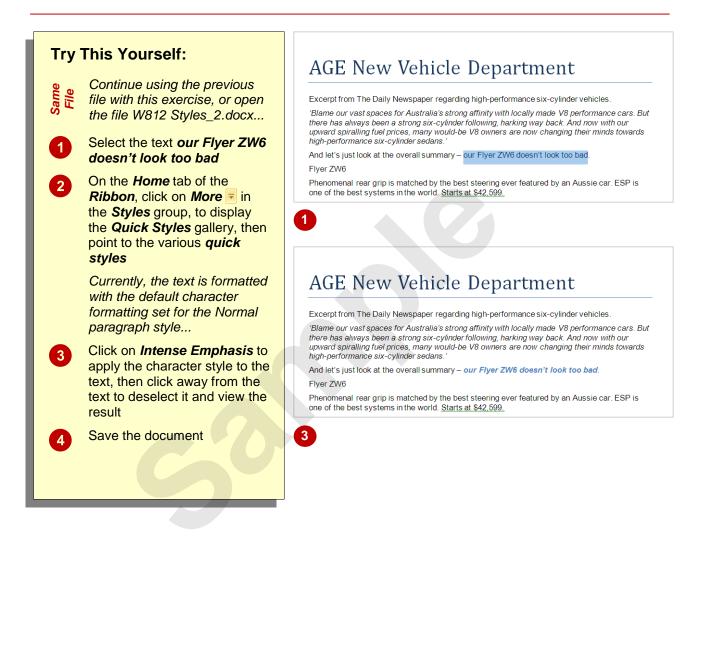
- 1. Click in the paragraph
- On the *Home* tab, click on a style in the Styles group OR
- Click on *More* <sup>→</sup> in the *Styles* group and click on a style in the gallery

#### Handy to Know...

• The **Quick Styles** gallery contains both paragraph and character styles. If you click on a character style in the gallery, only the word that you clicked on in the document will change to the new style and not the whole paragraph

# **APPLYING CHARACTER STYLES**

Every paragraph in a document has a paragraph style applied to it – even if it is just the default *Normal* style. As well as defining paragraph formatting, a paragraph style also specifies the formatting applied to the text (characters) in the paragraph. You can overwrite the default character formatting by applying a *character* style to selected text within a paragraph.



### For Your Reference...

To apply a character style:

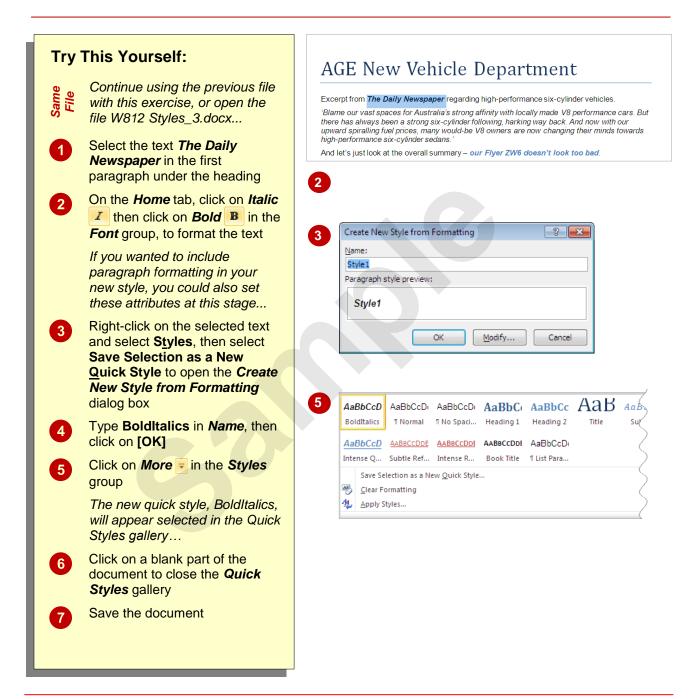
- 1. Select the text
- On the *Home* tab, click on a style in the Styles group OR
- Click on *More* <sup>→</sup> in the *Styles* group and click on a style in the gallery

#### Handy to Know...

 To remove all formatting and styles applied to selected text, click on the dialog box launcher in the *Styles* group to open the *Styles* pane and select Clear All.

# **CREATING A QUICK STYLE**

Word includes many *quick styles* that you can easily apply to create professional-looking documents. These quick styles appear in the *Quick Styles* gallery. Although many styles have been predefined, there will be times when you will need to create your own styles. When you create a new quick style, it is automatically added to the *Quick Style* gallery.



### For Your Reference...

To *create* a *quick style*:

- 1. Select the text and format it as desired
- 2. Right-click on the text
- Select Styles, then select Save Selection as a New Quick Style
- 4. Type the Name and click on [OK]

#### Handy to Know...

 To modify a quick style, right-click on the quick style in the *Quick Style* gallery and select <u>Modify</u>. Make the required formatting changes, and select *Automatically update* to update all text with that style applied. Click on [OK] to update the style.

# **CREATING A PARAGRAPH STYLE**

Rather than using, or basing new styles on quick styles, you may want to *create a style* from scratch. For more complex styles it may be easier to create a new style and then assign the required formatting attributes to that style. When you create a new paragraph style, you have many formatting options available that are not available when creating quick styles.

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### For Your Reference...

To create a paragraph style:

- 1. Open the Styles pane
- 2. Click on New Style
- 3. Type a *Name*, select *Paragraph* in *Style type*, then set other options as desired
- 4. Click on [OK]

#### Handy to Know...

 If you want Word to automatically generate a table of contents for your document, you must use Word's *Heading* styles. Word will look for headings with these styles applied to include in the table of contents. Remember that you can change the attributes for a style if desired.

### **CREATING A CHARACTER STYLE**

You might create a *character style* to format specific text within a paragraph differently to the rest of the paragraph. For example, you might want to apply an underline style or colour, adjust character spacing and kerning, or apply borders and shading. When you apply a character style to selected text, it overrides the paragraph style currently applied to that text.

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	indicating that it is a character		
	style		
6	Click on Close × to close the		
	Styles pane, then save the		
	document		

### For Your Reference...

To create a character style:

- 1. Open the Styles pane
- 2. Click on New Style
- 3. Type a *Name*, select *Character* in *Style type*, then set other options as desired
- 4. Click on [OK]

#### Handy to Know...

To modify an existing paragraph or character style, point to the style in the *Styles* pane, click on the drop arrow and select
 Modify. Make the required formatting changes, and select *Automatically update* to update all text with that style applied. Click on [OK] to update the style.

### **UNDERSTANDING TEMPLATES**

A *template* is a preformatted document that is used to create other documents. Templates can automate the process of sending out routine correspondence such as letters, memos and faxes. A well-designed template will contain all of the required page layout and formatting, so all you need to do is create a document based on that template, then click and type the required text.

### **Elements Of A Template**

A document template might contain the following elements that help to automate and speed up document production, especially for common business documents:

- *Styles* to format headings, text and paragraphs
- **Page Layout:** such as page size and orientation, margins, headers and footers (for letterhead and logos, for example), cover pages and so on
- **Page Formatting:** such as borders, lines and other visual elements
- Boilerplate text to be used, such as greetings, salutations, standard content and so on. This
  text may also be held in *placeholders*, which control the position and format of text
- *Macros* to automate routine tasks, such as shortcuts for inserting the date, updating the file location or inserting a particular block of text
- **Building blocks** that can be used to insert blocks of standard text, closing signatures, phrases or images into a document
- **Themes** that comprise coordinated colours, fonts (such as heading and body styles) and effects.

### Using Available Templates

By default, all new documents in Word are based on the *Normal.dotx* template, which can be modified to suit your needs. You can create your own templates, or Word includes many installed *sample templates* that you can use to create new documents. To view the full range of installed templates, click on the *File* tab of the *Ribbon* to display *Backstage view*, then click on *New* and click on *Sample Templates*. You can also modify sample templates to suit your needs.

If this range is still not enough to satisfy you, *Microsoft Office Online* contains an extensive library of templates that you can download and use freely. These are available at *www.office.com*.

### **Differences Between Templates And Documents**

A Word template is similar to a Word document except that it can contain **building blocks**. You can also tell the difference between a template and a document by their file extensions. Word documents use the file extension \*.**docx** while templates, by default, include the file extension \*.**dotx**. Templates can also include the file extension \*.**dotm**. Templates with the file extension \*.**dotm** support VBA macro code while templates with the file extension \*.**dotx** cannot store VBA macro code.

### **Locating Templates**

Unless you specify the location in which to save the template, it will be stored in the default *Templates* folder. It is recommended that you store all of your templates in this folder so that they will appear in the list of available templates in the *New* options in *Backstage view*.

To find out where your templates are stored, click on the *File* tab of the *Ribbon* and click on **Options**. Click on *Advanced*, scroll down and click on **[File Locations]**. Your templates reside in the folder specified in *User templates*. To view the full address path or to modify the template location, click on **[Modify]**.