

# Word 3 :

## Complex documents, collaboration and Mailmerge

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For those who need to create and edit complex documents with indexes, cross references and field codes. Track document edits, compare documents and collaborate with others. Set up and manage mailmerges. Create and edit complex tables, apply timesavers and learn quick tips.

### Objectives

On completion of this course delegates will be able to:

- ✓ Create complex Tables
- ✓ Work with Excel data in Word
- ✓ Use Mail Merge
- ✓ Find and replace text
- ✓ Manage files within Word
- ✓ Mark specific parts of a document with bookmarks and cross references
- ✓ Insert a footnote and endnote into a document
- ✓ Create a document index
- ✓ Insert Field codes for document automation
- ✓ User content controls to prompt the user for data and restrict editing and formatting
- ✓ Track document changes and compare documents

### Course Contents

#### Advanced Table features

- Creating & Selecting Table
- Components
- Inserting & Deleting Rows & Columns into a Table
- Formatting Columns & Text in a Table
- Merging & Splitting Cells
- Setting Table Properties
- Applying Table Styles
- Converting a Table into Text
- Converting Text to a Diagram
- Placing Headings on All Pages
- Sorting Table Data

- Using Formulas in Tables
- Excel Tables in Word

#### Using Bookmarks

#### Using Footnotes & Endnotes

#### Creating an Index

- Generating & Updating an Index

#### Tracking Revisions

- Enabling, Setting & Disabling Change
- Tracking
- Sending & Merging Documents
- Reviewing Tracked Changes

- Managing Comments
- Accepting/Rejecting All Changes

### Field Codes

- Understanding Word Field Codes
- Inserting and modifying field codes
- Calculation in field codes

### Working with Mail Merge

- Identifying the Main Document
- Creating a Data Source
- Adding Merge Fields to a Document
- Previewing and Completing a Mail Merge
- Sorting & Filtering Records to be Merged
- Creating Labels and a Catalogue

### Word Options and Settings

- Setting View Options
- Setting Save Options

- Modifying Default File Locations
- Adding/Removing commands on the QAT and Ribbon

### Using Forms

- Creating & Protecting a Form
- Content Controls
- Legacy Controls
- Defining a Text, a Check Box, a Drop-Down Form Field
- Calculating a Text Form Field
- Saving a Form as a Template
- Unprotecting a Form Template
- Printing a Form
- Deleting a Form Template

### Managing Files

- Selecting File Views
- Sorting Word Files
- Assigning a Password
- Removing a Password
- Version control