Microsoft®

Word 2021 Advanced

Quick Reference Guide

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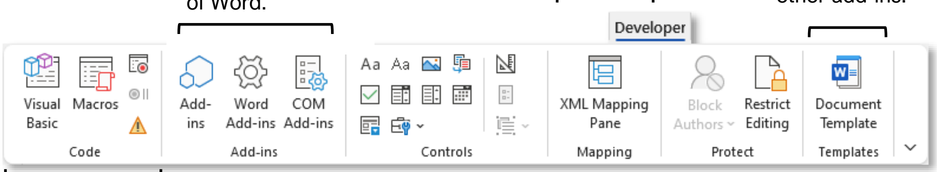
The Developer Tab

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).

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.

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**.

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

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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, then click **Add** to add it, or 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 *n* instances of a character
{*n*, }	at least *n* instances of a character
{*n*, *m*}	between *n* and *m* 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.

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