

CHAPTER 1

InFocus

SMARTART

SmartArt refers to the range of graphics available in Word that you can use to create diagrams such as flow charts, process charts, organisation charts, and the like. Select a SmartArt graphic from the gallery and then customise it to suit your needs. SmartArt helps you to create professional-looking diagrams in minutes.

In this session you will:

- ✓ gain an understanding of **SmartArt**
- ✓ learn how to insert a **SmartArt** graphic
- ✓ learn how to insert text into a **SmartArt** graphic
- ✓ learn how to indent text
- ✓ learn how to change the **SmartArt** style
- ✓ learn how to change colours in a **SmartArt** graphic
- ✓ learn how to change the layout of a **SmartArt** graphic
- ✓ learn how to add more shapes to a **SmartArt** graphic
- ✓ learn how to resize a **SmartArt** graphic.

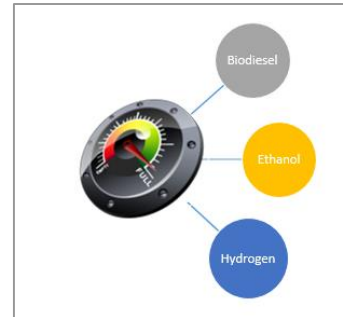
UNDERSTANDING SMARTART

SmartArt allows you to visually communicate important ideas and information. For example, you can use SmartArt graphics to depict processes, hierarchies, relationships and so on.

By using SmartArt to communicate information, you can create visually-appealing diagrams that can say so much more than words alone.

How To Use SmartArt

SmartArt can be a simple flowchart depicting a process or a complex arrangement of shapes and lines used to show relationships. To work with SmartArt, simply select a **layout** from the SmartArt gallery that most closely represents the way you want to structure your information, and then customise the SmartArt graphic by adding text and formatting shapes. The picture to the right is an example of a SmartArt graphic used to list a range of complementary fuels. Presented in this way, dry subject matter suddenly becomes an interesting read.

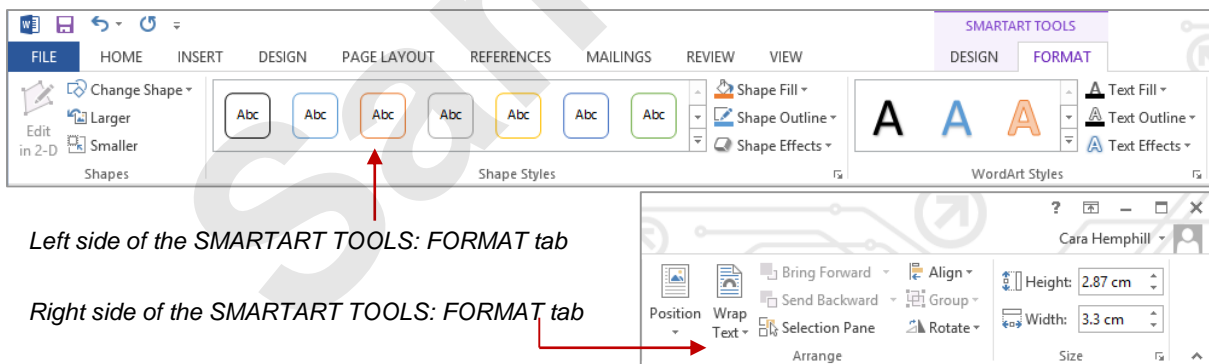


The SMARTART TOOLS: DESIGN tab

When you insert SmartArt into your document, two tabs appear – **SMARTART TOOLS: DESIGN** and **SMARTART TOOLS: FORMAT**. The **DESIGN** tab allows you to edit SmartArt by adding shapes, bullets or text and shuffling shapes around by promoting or demoting them. It also allows you to choose alternative layouts, colours and styles to the default setting. If you change your mind about the changes you have applied you can easily revert back to the default state by using the **Reset Graphic** option in the **Reset group**.

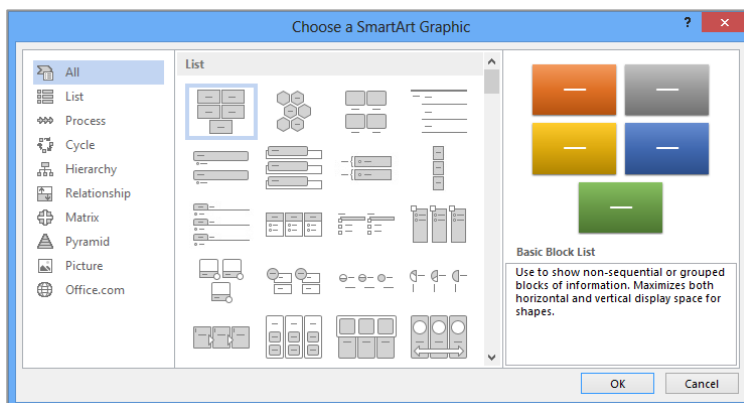
The SMARTART TOOLS: FORMAT tab

The **SMARTART TOOLS: FORMAT** tab, as displayed below, allows you to make shapes larger or smaller, change the colour of the outline or fill of your shapes and add effects to the shapes and/or text. You can also position your SmartArt on the page.



The SmartArt Gallery

SmartArt graphics are available from the **SmartArt** gallery. Click on a **category** in the left pane to view a range of **layouts** for that category in the centre pane. Click on a layout to **preview** it in the right pane.



- **List:** For items without a sequence, such as a list of key objects or concepts.
- **Process:** For items or steps with a specific sequence and end point.
- **Cycle:** For steps with a continuing sequence.
- **Relationship:** To illustrate relationships between things, such as objects and people.
- **Matrix:** For grid-like diagrams.
- **Pyramid:** For a hierarchy of items, like the traditional food pyramid.
- **Picture:** To create picture galleries and collages, for example.

INSERTING A SMARTART GRAPHIC

To create diagrams using SmartArt graphics, you first need to open the **SmartArt** gallery. You then select a layout from one of the eight categories that will best depict the information you want to

convey. Once you insert the graphic, you can then insert text and format the shapes as required.

Try This Yourself:

Open File

Before starting this exercise you **MUST** open the file *W1336 SmartArt_1.docx*...

- 1 Move to page **2** and click in the space between the heading **Research** and the paragraph above

The SmartArt graphic will be inserted here...

- 2 Click on the **INSERT** tab, then click on **SmartArt** in the **Illustrations** group to open the **Choose a SmartArt Graphic** dialog box

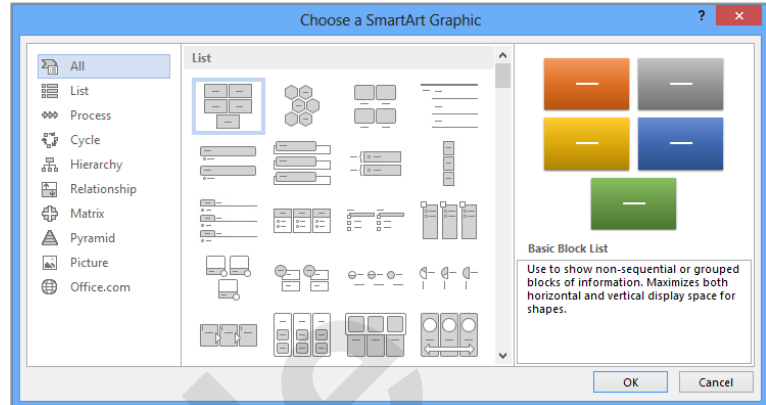
- 3 Click on each category under **All** in the left pane, and then click on various layouts in the centre pane to preview them in the right pane

- 4 Click on the **List** category in the left pane, then click on **Vertical Box List** in the centre pane to select this layout

- 5 Click on **[OK]** to insert the SmartArt graphic

The graphic is contained within a placeholder and the top [Text] placeholder is selected, ready for you to start typing...

- 6 Click outside the placeholder to deselect the graphic



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The process of building a house can be broken down into three main categories: Preparation, Building, and Finishing. The following diagram shows some of the considerations in the preparation phase.



Research

The first step in any major project is to learn as much as possible about the subject at hand. Building your own home is no exception. Surprisingly large numbers of people seem to think that anyone can design and build the home of their dreams without first spending the time research and plan what is involved.

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For Your Reference...

To **insert** a **SmartArt** graphic:

1. Click on the **INSERT** tab, then click on **SmartArt** in the **Illustrations** group
2. Click on a category in the left pane
3. Click on a layout, then click on **[OK]**

Handy to Know...

- Choosing a SmartArt layout is just a starting point for your illustration. You can add or remove SmartArt objects and text as needed and the elements in the diagram will resize automatically.

INSERTING TEXT

Text is inserted into text placeholders within the corresponding shape. There are two ways to insert text into a SmartArt graphic. You can click on the **[Text]** placeholder and start typing, or

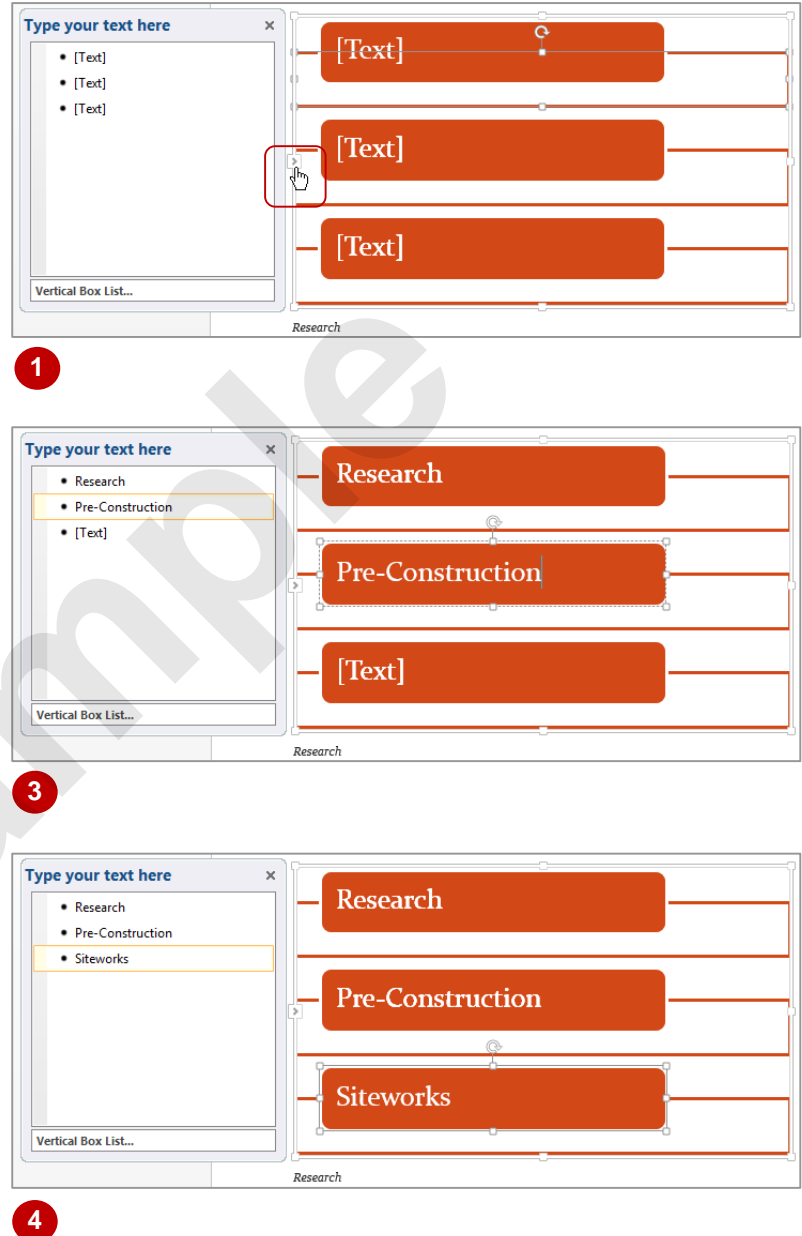
display the **Text** pane and type your text into it. Typing text into the **Text** pane is generally the quicker method as you don't need to select each shape before you type your text.

Try This Yourself:

Same File

Continue using the previous file or open the file *W1336 SmartArt_2.docx...*

- 1 Click on the SmartArt graphic, then click on the tab on the placeholder's left border to open the **Text** pane, as shown
Each bullet point in the Text pane corresponds to a shape in the graphic...
- 2 Click on the top bullet point and type **Research**
The text appears in the corresponding shape in the chart...
- 3 Press **↓** to move to the next bullet point and type **Pre-Construction**
- 4 Repeat step 3 to add **Siteworks** to the third shape



For Your Reference...

To **insert text** into a **SmartArt graphic**:

1. Click on the SmartArt graphic to display the placeholder, then click on the tab on the left border of the placeholder
2. Type the text, using the arrow keys to move between entries (shapes)

Handy to Know...

- To display and hide the **Text** pane, click on the SmartArt graphic to display its placeholder, then click on the **SMARTART TOOLS: DESIGN** tab and click on **Text Pane** in the **Create Graphic** group.
- You can add a shape by pressing **Enter** in the text pane.

INDENTING TEXT

When adding text to a SmartArt shape, you may want to indent text so that you can create a list or simply an indented paragraph. Fortunately indenting text in a SmartArt shape is easy. By

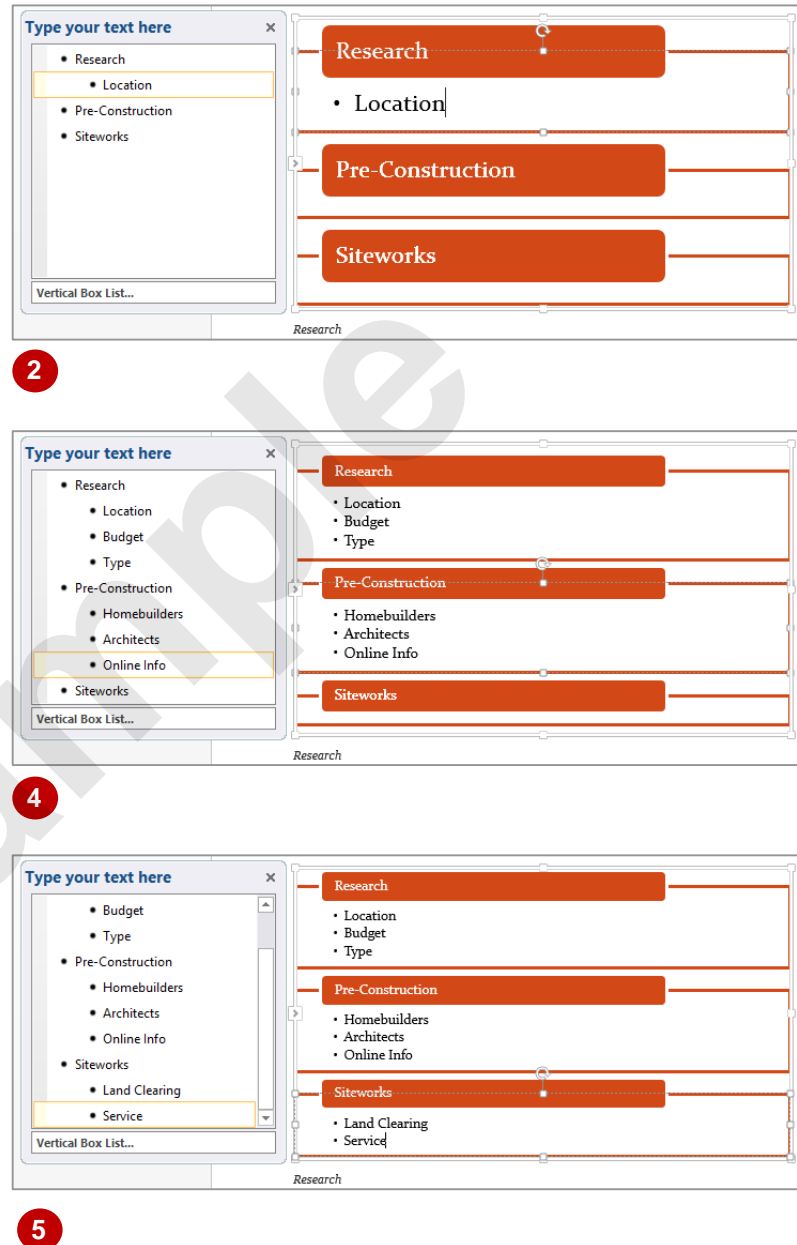
using the text pane you can create indented text by pressing **Tab**, as demonstrated in the exercise below.

Try This Yourself:

Same
File

Continue using the previous file with this exercise, or open the file *W1336 SmartArt_3.docx...*

- 1 Ensure the SmartArt graphic is selected and the **Text** pane is displayed, then click after the word **Research**
- 2 Press **Enter**, type **Location**, then press **Tab** to indent the word **Location** under **Research**
- 3 Press **Enter**, type **Budget**, then press **Enter** again and type **Type**
- 4 In the **Text** pane, click after **Pre-Construction** and repeat steps 2 and 3 to enter the list as shown
- 5 In the **Text** pane, click after **Site Works** and repeat steps 2 and 3 to enter the list as shown
- 6 Click on **Close** at the top of the **Text** pane to close the **Text** pane



For Your Reference...

To **indent text**:

1. In the **Text** pane press **Enter**, then press **Tab**
2. Type the text as required
3. Press **Enter** to create another indented entry

Handy to Know...

- When creating an indented list in a SmartArt graphic, you can create further indented levels by pressing **Enter** + **Tab** again.
- You can outdent indented text by clicking in the appropriate bullet in the **Text** pane and pressing **Shift** + **Tab**.

CHANGING THE SMARTART STYLE

A quick and easy way to add a professionally designed combination of effects to your SmartArt graphic is by applying a **SmartArt Style**. SmartArt Styles include fills, edges, shadows,

line styles, gradients, and 3-D perspectives and are applied to the entire SmartArt graphic. You can also apply an individual Shape style to one or more shapes in your SmartArt graphic.

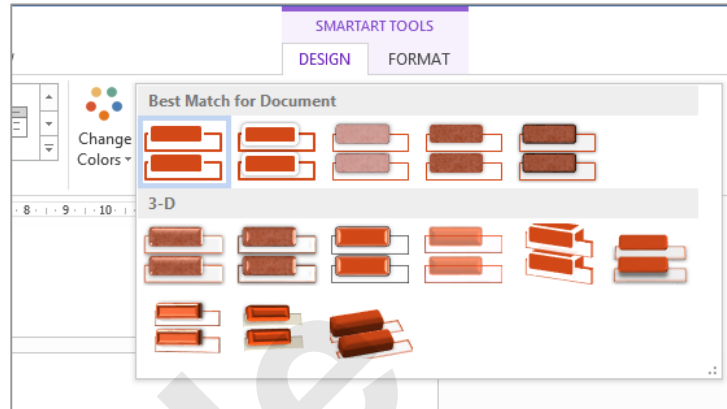
Try This Yourself:

Same File

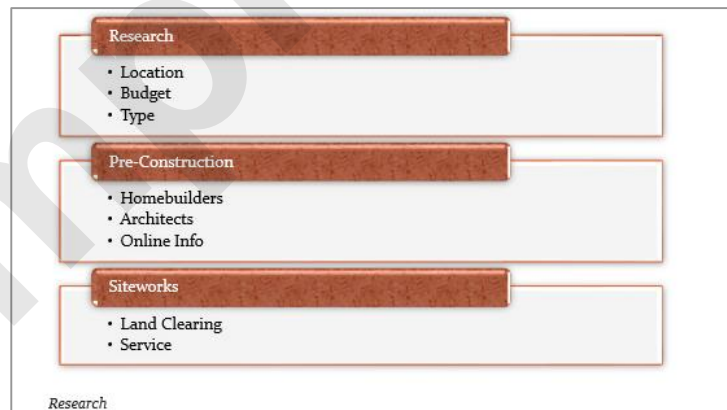
Continue using the previous file with this exercise, or open the file W1336 SmartArt_4.docx...

- 1 Click on the SmartArt graphic to select it
- 2 Click on the **SMARTART TOOLS: DESIGN** tab
- 3 Click on the **More** arrow for the **SmartArt Styles** gallery in the **SmartArt Styles** group to see the styles in the gallery
- 4 Point to the various options in the gallery and notice how Live Preview applies the style to the SmartArt graphic
- 5 Under **3-D**, click on the first option (**Polished**)
- 6 Click in the document to deselect the SmartArt graphic and view the result

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For Your Reference...

To **change** the **SmartArt style**:

1. Click in the SmartArt graphic to select it
2. Click on the **SMARTART TOOLS: DESIGN** tab
3. Click on the desired **SmartArt Style** in the **SmartArt Styles** group

Handy to Know...

- If you customise your SmartArt graphic and then apply a **SmartArt Style** that formats the same aspects of your document, your customisation will be lost.
- The **SmartArt Styles** that are available depend on the underlying document theme.

CHANGING SMARTART COLOURS

You can easily change the colours of the entire SmartArt graphic or just one shape in it by using the contextual tabs that appear when a SmartArt graphic is selected. The **SMARTART TOOLS:**

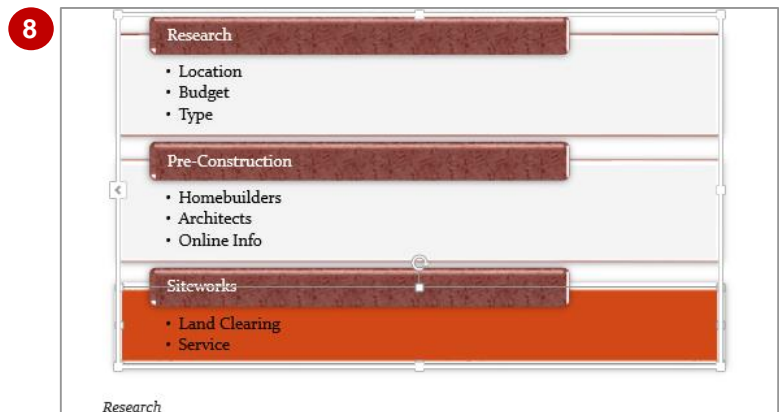
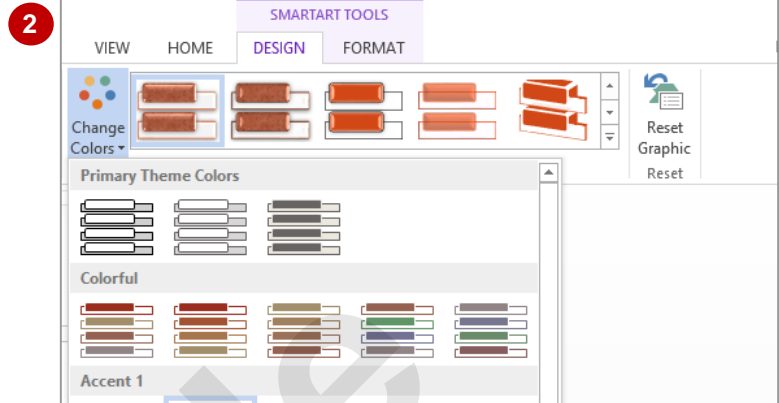
DESIGN tab contains options that will change the entire SmartArt graphic, while the **SMARTART TOOLS: FORMAT** tab contains options for working on the selected shape within the SmartArt graphic.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W1336 SmartArt_5.docx...

- 1 Click on the SmartArt graphic to select it
- 2 Click on the **SMARTART TOOLS: DESIGN** tab, then click on **Change Colours** in the **SmartArt Styles** group to see a selection of themed options
- 3 Point to the different options to see the options applied to the SmartArt graphic in Live Preview
- 4 Under **Accent 2**, click on **Transparent Gradient Range – Accent 2**
- 5 Click on the third large rectangle in the **SmartArt** graphic to select it
- 6 Click on the **SMARTART TOOLS: FORMAT** tab, then click on the **More** arrow for the **Shape Styles** gallery in the **Shape Styles** group to display the shape gallery
- 7 Click on **Light 1 Outline Coloured Fill – Orange Accent 1**
- 8 Click in the document to deselect the SmartArt graphic and view the result



For Your Reference...

To **change** the **colours** of a **SmartArt graphic**:

1. Click on the SmartArt graphic to select it
2. Click on the **SMARTART TOOLS: DESIGN** tab, then click on **Change Colours** in the **SmartArt Styles** group
3. Click on a themed colour scheme

Handy to Know...

- If you don't like the formatting that you've applied to a SmartArt graphic, you can reset the image by clicking on **Reset Graphic** in the **Reset** group on the **SMARTART TOOLS: DESIGN** tab.

CHANGING A SMARTART LAYOUT

As usual with Microsoft features like SmartArt, you aren't locked into a particular style or formatting feature. In fact these can easily be changed without any threat to or fear of losing

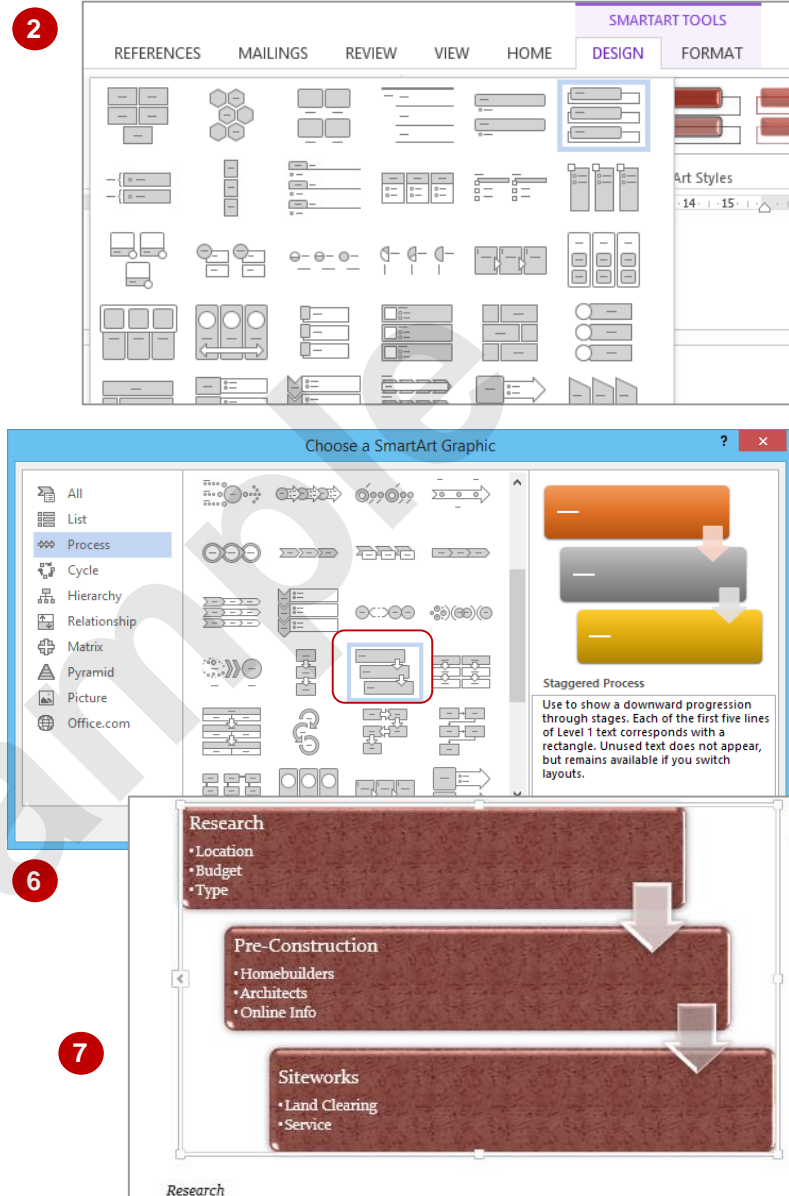
data. There are dozens and dozens of layouts available for your SmartArt, and even though you may have entered your text, you can opt for another layout at any stage.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file W1336 SmartArt_6.docx...

- 1 Click on the SmartArt graphic to select it
- 2 Click on the **SMARTART TOOLS: DESIGN** tab and click on the **More** arrow in the **Layouts** group to see a gallery of layout options
- 3 Point to the various options and notice how Live Preview applies the settings
- 4 Select **More Layouts** to open the **Choose a SmartArt Graphic** dialog box
- 5 Click on the **Process** category
- 6 Scroll down to and click on the **Staggered Process** option, as shown
- 7 Click on **[OK]** to apply this layout to the image



For Your Reference...

To **change** a **SmartArt layout**:

1. Click on the SmartArt graphic to select it
2. Click on the **SMARTART TOOLS: DESIGN** tab, then click on a layout in the **Layouts** group

Handy to Know...

- When the font size in one shape shrinks because you add more text to a shape in a SmartArt graphic, all of the other text in the remaining shapes will reduce to the same size to keep the SmartArt graphic looking consistent and professional.

ADDING MORE SHAPES TO SMARTART

Once you have created a SmartArt graphic, you can manipulate the content and the structure of the layout using the **Create Graphic** group on the **SMARTART TOOLS: DESIGN** tab. You can

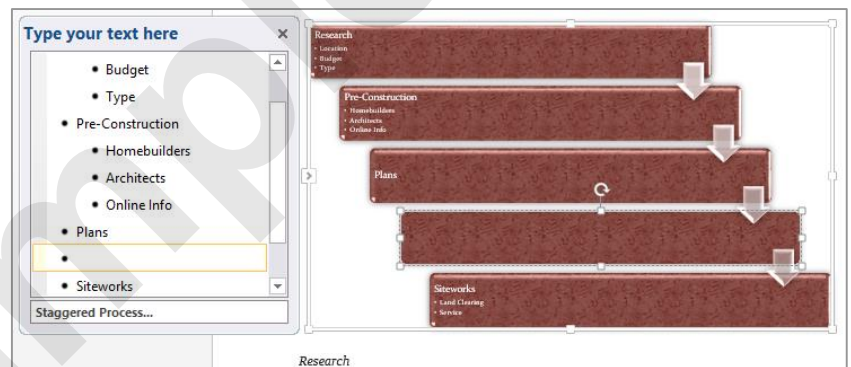
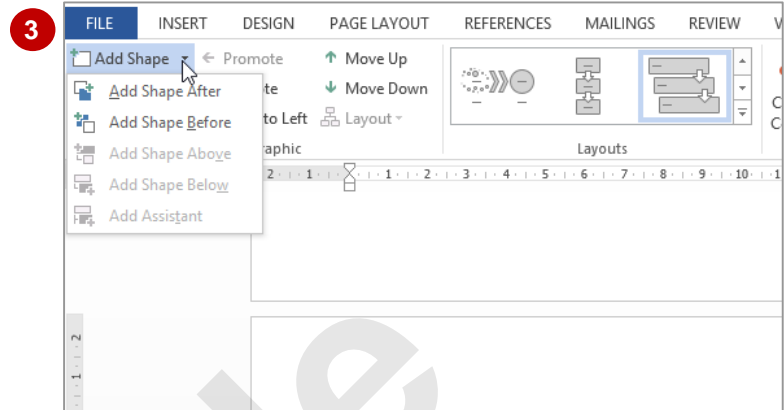
add extra shapes, promote or demote bullets, add extra bullets and even change the alignment of the SmartArt graphic between left and right display.

Try This Yourself:

Same File

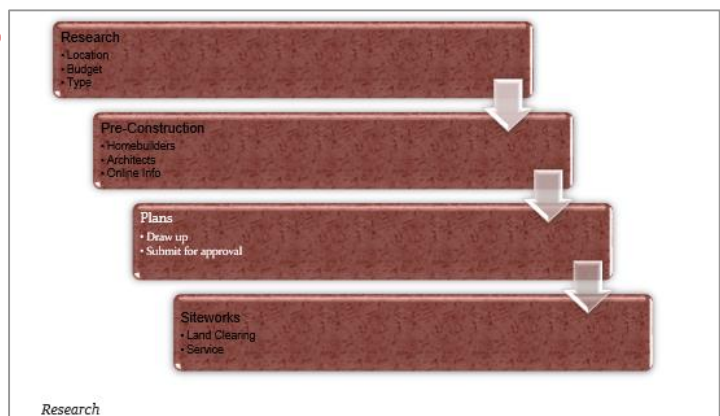
Continue using the previous file with this exercise, or open the file *W1336 SmartArt_7.docx...*

- 1 Click on the SmartArt graphic to select it
- 2 Click on the **Pre-Construction** rectangle in the SmartArt graphic to select the shape
- 3 Click on the **SMARTART TOOLS: DESIGN** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group to display a menu of options
- 4 Select **Add Shape After** to insert a rectangle shape after the selected one
- 5 Click on **Text Pane** in the **Create Graphic** group to open the **Text** pane
- 6 Type **Plans** and press **Enter**
- 7 Press **Tab** and type **Draw up**, then press **Enter** and type **Submit for approval**
- 8 Click on **Close** to close the **Text** pane, then click in the document to deselect the SmartArt graphic and see the result



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For Your Reference...

To **insert another shape** into a **SmartArt** graphic:

1. Click on a shape in the **SmartArt** graphic to select it
2. Click on the **SMARTART TOOLS: DESIGN** tab, then click on the drop arrow for **Add Shape** in the **Create Graphic** group
3. Select **Add Shape After**

Handy to Know...

- If you click on **Add Shape** in the **Create Graphic** group (rather than on its drop arrow), a new shape will automatically be added after the selected shape.
- You can **delete** a shape by selecting it and pressing **Del**. The remaining SmartArt objects will adjust automatically.

RESIZING SMARTART

You may decide that a SmartArt graphic would look better somewhere else in a document or perhaps you want to change its dimensions on the page. You can quickly and easily resize and

move the entire SmartArt graphic or individual elements/shapes. Where possible, Word tries to readjust the text within the SmartArt graphic to suit its new dimensions.

Try This Yourself:

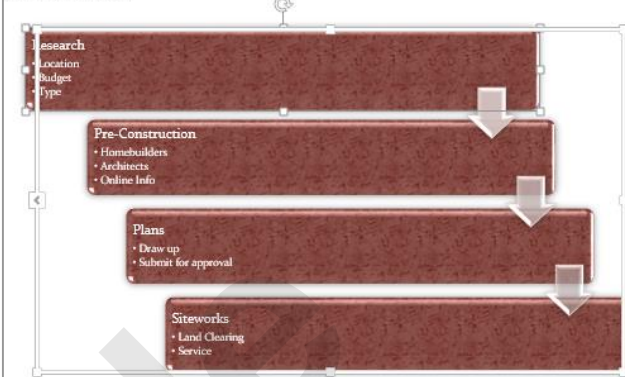
Same
File

Continue using the previous file with this exercise, or open the file W1336 SmartArt_8.docx...

- 1 Click on the SmartArt graphic to select it, then click on the **Research** rectangle to select this shape
- 2 Click on the **SMARTART TOOLS: FORMAT** tab, then click twice on the **Larger** command in the **Shapes** group to increase the size of the shape
- 3 Click on a white area of the SmartArt canvas (background) to deselect the specific shape
- 4 Click on **Shape Fill** in the **Shape Styles** group and click on **Grey 50%, Text 2, Lighter 60%** to recolour the background
- 5 Ensure that the background is still selected, then click on the value in **Height** in the **Size** group and type **10**
- 6 Click in the value in **Width** in the **Size** group, type **14** and press **Enter**
- 7 Click in the document to deselect the SmartArt

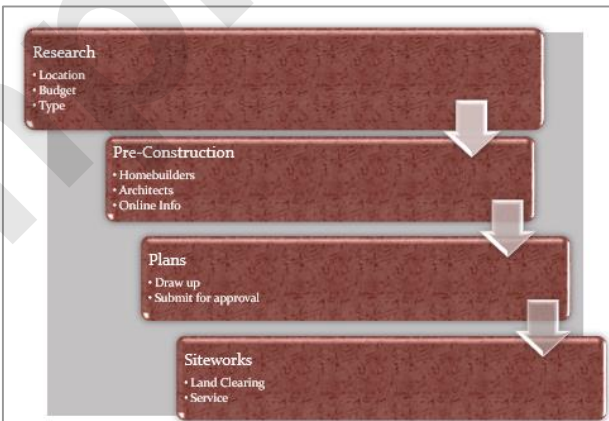
2

Building, and Finishing. The following diagram shows some of the considerations in the preparation phase.



Research

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Research

For Your Reference...

To **resize SmartArt elements**:

1. Click on the **SMARTART TOOLS: FORMAT** tab
2. Click on **Larger** or **Smaller** in the **Shapes** group for selected shapes, or Click on **Height** and/or **Width** in the **Size** group for the entire SmartArt graphic

Handy to Know...

- You can resize SmartArt elements by dragging the selection handles that appear when a shape is selected in the SmartArt graphic.

CHAPTER 2

InFocus

LONGER DOCUMENTS

A **table of contents** is inserted towards the beginning of the document as a list of the headings in the document, and is designed to help readers navigate to relevant parts of the document. A table of contents will also include the page number of the heading.

In Word you can generate a table of contents that will update automatically, as long as you have applied the relevant **styles** to your headings.

An **index** is an alphabetical listing of the topics or subjects in a document, and is typically located at the end of a document. An index is used primarily as a navigational tool, with the corresponding page number(s) for each topic listed alongside each item in the list.

In this session you will:

- ✓ gain an understanding of tables of contents
- ✓ learn how to insert a built-in table of contents
- ✓ learn how to navigate with a table of contents
- ✓ learn how to update page numbers
- ✓ learn how to update a table of contents
- ✓ learn how to customise a table of contents
- ✓ learn how to format a table of contents
- ✓ gain an understanding of indexing
- ✓ learn how to mark index entries
- ✓ learn how to create an **AutoMark** file
- ✓ learn how to use an **AutoMark** file
- ✓ learn how to delete unwanted index entries
- ✓ learn how to generate an index
- ✓ learn how to modify the index format
- ✓ learn how to update an index.

UNDERSTANDING TABLES OF CONTENTS

A table of contents is located near the beginning of a document and contains a list of headings within that document, as well as a page number reference for each heading. A table of contents

enables a reader to easily navigate the document and is particularly useful in long documents. It can be updated automatically when changes have been made to the document.

Understanding Styles And Tables Of Contents

To understand how Word generates a table of contents, you must also have an understanding of styles and how they enable you to quickly insert and update a table of contents.

Word will generate a table of contents by looking for any headings (or text) that have the default **Heading** styles applied, such as **Heading 1**, **Heading 2**, and so on.

These nine levels of default **Heading** styles offer nine levels of headings and subheadings that you can include in a table of contents. You can also choose which of these heading levels (that is, how many levels) you want to include in the table of contents. You can find Word's default **Heading** styles in the **Styles** group on the **HOME** tab, and these can be modified to suit the requirements of the document.

The default **Heading** styles are contained within the **Normal.dotm** template, so any document that you create based on this template will contain these default styles. If you have developed your own template and these styles no longer exist in the template, make sure to rename the existing heading styles as **Heading 1**, **Heading 2** and so on, so that Word can recognise these for inclusion in the table of contents. Alternatively, you may prefer to copy the default **Heading** styles from **Normal.dotm** and modify them as required. To copy styles between templates and documents, click on the **Developer** tab, then click on **Document Template** to display the **Templates and Add-Ins** dialog box. Click on **[Organiser]**, and ensure that the styles list for **Normal.dotm** appears in the right pane. Select the headings styles in **Normal.dotm**, then click on **[Copy]** to copy the styles to the current template or document. Click on **[Close]** when finished.

You can also **assign** custom styles to levels where you are required to use, for instance, in-house styles. Do this by clicking on **[Options]** in the **Table of Contents** dialog box, then assigning a level (1, 2, 3 and so on) to the relevant custom style.

Options For Inserting A Table Of Contents

Word provides two methods for inserting a table of contents into a document: you can use a predesigned table of contents, which produces an accurate but fairly limited result, or you can create a table of contents using the **Table of Contents** dialog box.

The **Table of Contents** dialog box is a more advanced method and offers you greater control over the content and appearance of the table of contents. To customise the table of contents (e.g. specify the number of heading levels to use, select an alternate tab leader character, change the style of the text in the table of contents) you will need to use the **Table of Contents** dialog box.

