

Maintaining Documents and Macros 12

LESSON SKILL MATRIX

Skill	Exam Objective	Objective Number
Arranging Document Views		
Recording Macros	Assign shortcut keys. Record simple macros.	1.4.9 1.4.8
Monitoring Macro Security	Manage macro security.	1.4.10

KEY TERMS

- digital signature
- hacker
- macro
- master document
- subdocuments





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You are the president of the Lakeville.NET User's Group, which is a group of students, faculty, and professionals in the community whose purpose is to educate, help build development skills, and provide a forum for networking. This group meets monthly and schedules regular workshops and speakers on relevant topics. In this role, you discover that you use many of the same types of documents on a regular basis, and you would like to streamline the process of creating similar documents. In this lesson, you learn to work with outlines, arrange master documents and subdocuments, and record and manage macros.

SOFTWARE ORIENTATION

Outline View

When you open the Outline view from the View tab, the Outlining tab contains buttons for working with long documents and arranging the document into smaller sections. The Outlining tab is shown in Figure 12-1.

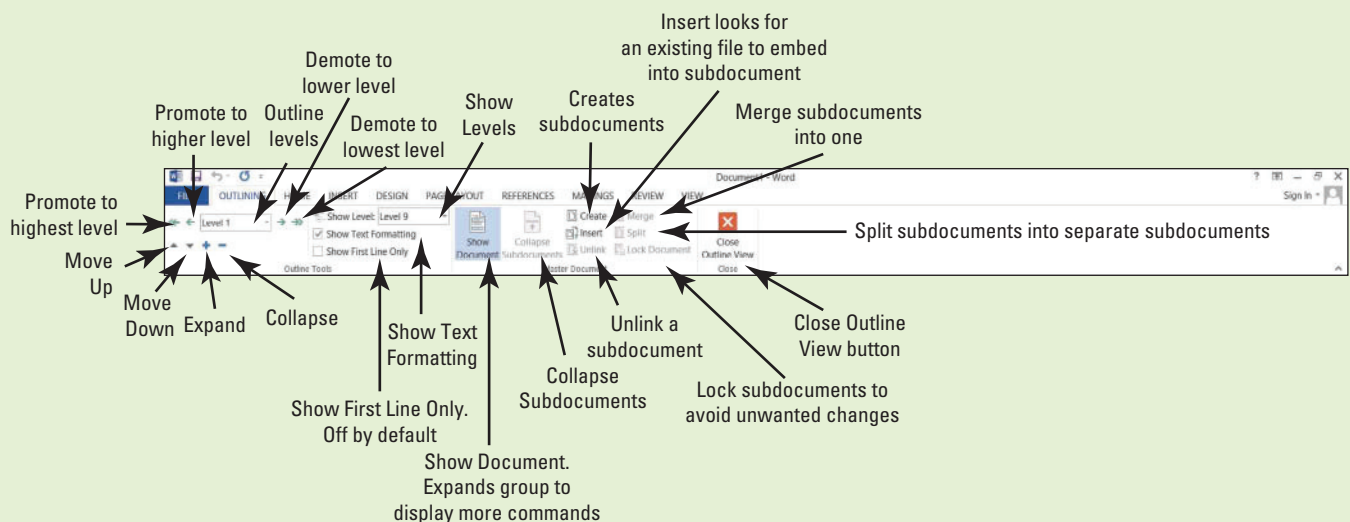


Figure 12-1
Outlining tab

Use this figure as a reference throughout this lesson as well as the rest of this book.

The Bottom Line**ARRANGING DOCUMENT VIEWS**

Creating master documents enables you to work efficiently with large reports such as your research paper or other long reports. These long documents are broken down into subdocuments making it more manageable and easy to edit.

Working with a Master and Subdocuments

A **master document** is the main document created in Word, such as your research paper. A research paper or another long report contains information such as a title, thesis, introduction, techniques, results, and works cited to name a few. This document can be a 60-page document, and scanning through the whole document could be cumbersome. Working with a master document can organize the heading sections into smaller sections called **subdocuments**, which are sections within the master document that have been separated into subsections. When a subdocument is created, it becomes a separate file from the master although it still remains linked to the master document. This allows you to open a small 2- or 3-page document rather than a 20-page document.

For example, you create a master document for long reports and research papers. When you finish formatting your master document with heading styles, you can separate it into a subdocument for each heading and its content. Subdocuments are created based on their heading styles; the subdocument is saved with the heading as the filename.

As a student, you will most likely have to take a technical writing class for one of your core courses and prepare a research paper. As you begin working on your research paper, you will outline it to make it more manageable and to keep yourself organized. Working with the master and subdocuments is similar to how you work on sections of your paper. You can edit from your whole master document or work in the subdocument as a separate document. When you edit and save subdocuments independently, the master document automatically gets updated because the subdocument is linked to the master document. When you need to review the master document, all editing changes will appear in the document.

Saving the Master Document

To help you manage the master document, it is best to save the master document and all the subdocuments in the same folder. Creating a folder makes locating subdocuments quick. The document that you will work on is already formatted with heading styles. In this exercise, you learn to create a folder, and then save the master document.

STEP BY STEP**Save the Master Document**

OPEN the **Hosting** document from lesson folder.

1. To save the document in a specific folder, click the File tab, and then click **Save As**. Click **Computer** and then click **Browse**.

The **Save As** dialog box opens for you to locate your flash drive.

2. Click the **New folder button** located under the address bar and type **Master Hosting** and press **Enter** to accept the new folder name.
3. With the folder selected, click the **Open button** or **double-click** to place the master folder in the address bar.

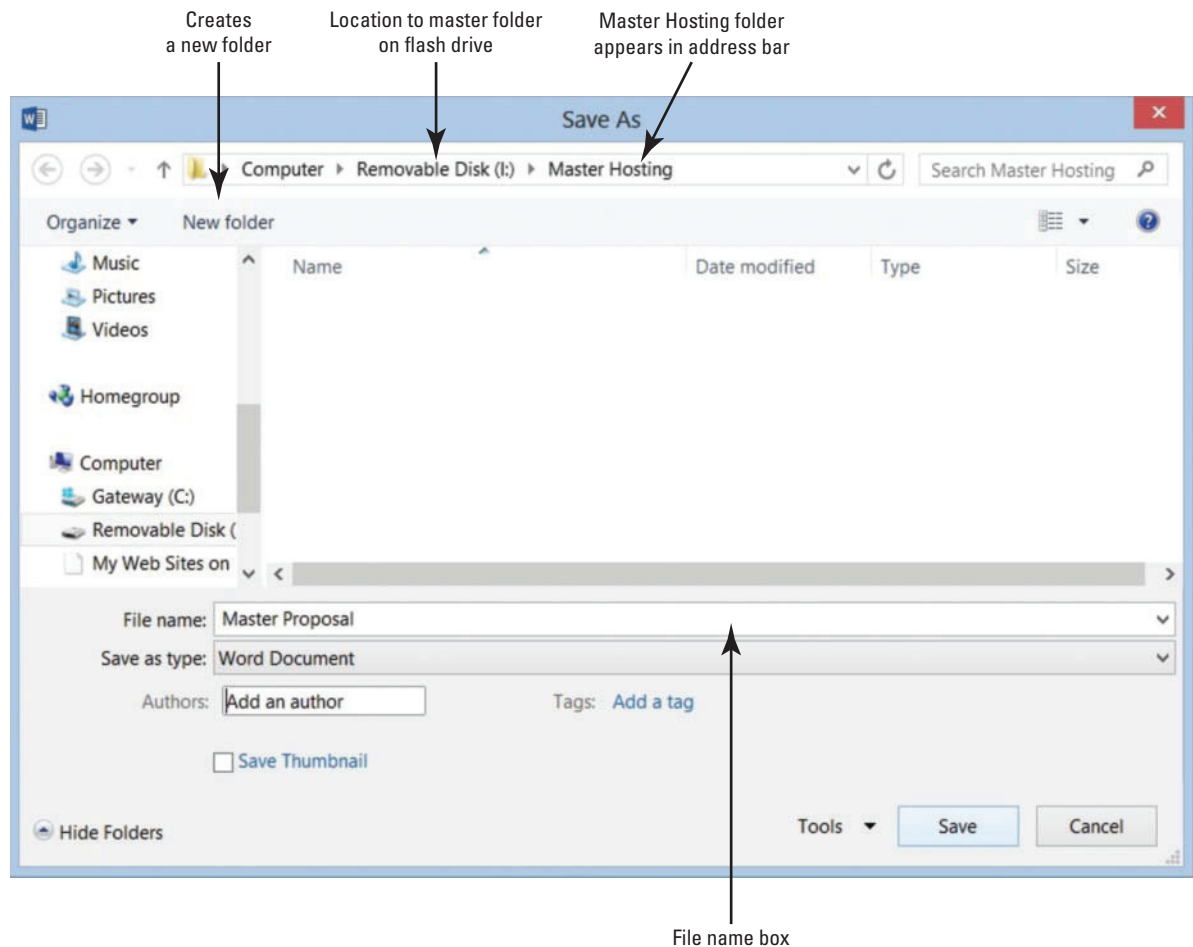
Creating a folder is easy and makes your job easier to locate the master document and subdocuments. When naming a folder, choose a name closely related to the document.

4. In the File name box, type **Master Proposal**.

Figure 12-2 displays the file in the folder.

Figure 12-2

Save As dialog box



5. Click the **Save** button to save the document in the Master Hosting folder.

PAUSE. LEAVE the document open for the next exercise.



**Cross
Ref**

Creating and saving documents is covered in Lesson 1.

Creating Subdocuments

A subdocument is part of the master document and is separated into small sections. Each subdocument has a unique filename based on the heading style that was applied to the document when it was created. As a student, this feature is useful for a large research paper—you work on one subdocument section at a time rather than having the whole document open. The first step is identifying the levels within the subdocuments just like you would in creating an outline. For example, Level 1, Level 2, and Level 3 is similar to creating an outline and identifying headings with Roman numerals I, II, and II.

When formatting your research paper, you apply a heading style to each new section in your paper (styles are covered in Lesson 3). When you are editing subdocuments separately, the master document is automatically updated. The Outlining tab contains the Collapse and Expand subdocument buttons that correlate with the master document. In this exercise, you create subdocuments that are saved separately.

STEP BY STEP**Create Subdocuments**

USE the document open from the previous exercise.

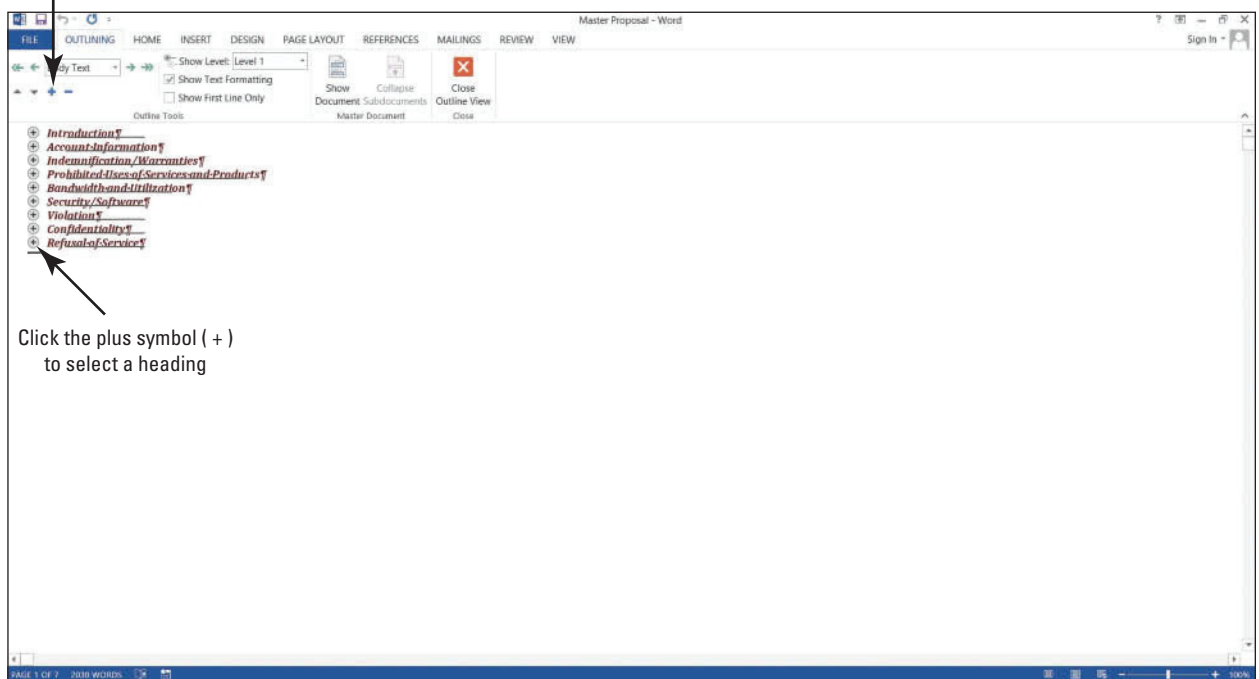
1. Click the **View tab**. In the Views group, click the **Outline button**. The Outlining tab opens and is placed by the Home tab.
2. In the Outline Tools group, click the drop-down arrow by *Show Level* and select **Level 1** to make the document more manageable.

This document has already been formatted with heading styles; when the levels are changed, the document collapses and only Level 1 displays on the screen as shown in Figure 12-3.

Figure 12-3

Document displayed by Level 1

Click the Expand (+) button to display content within heading



3. In the Master Document group, click the **Show Document button** to display additional commands as shown in Figure 12-4.

Figure 12-4

Show Document displaying additional commands



The Collapse Subdocuments button will become activated after a subdocument is created

4. Click the **plus (+) symbol** next to *Introduction* to select the heading. Even though you cannot see it, the content within the heading is also selected.

5. Click the **Create button** in the Master Document group to create a subdocument.

Notice that *Introduction* has a subdocument icon on the left side and is surrounded by a border with a *continuous section break* above and below the heading. This allows Word to distinguish the beginning and end of a subdocument with a continuous flow to the master document. A border indicates this is a subdocument. With your first subdocument created, the Collapse Subdocuments button becomes active. If you cannot see the continuous section break, select the **Show/Hide button** from the Home tab.



Cross Ref

Section breaks are covered in Lesson 5.

6. Select the **plus (+) symbol** next to the *Account Information* heading, and then click the **Create button**.

A border is automatically placed around the subdocument.

7. Repeat your steps for the remaining headings: *Indemnification/Warranties*, *Prohibited Uses of Services and Products*, *Bandwidth and Utilization*, *Security/Software*, *Violation*, *Confidentiality*, and *Refusal of Service*.

The document should display as shown in Figure 12-5. A border appears around each subdocument along with continuous section breaks.

Figure 12-5

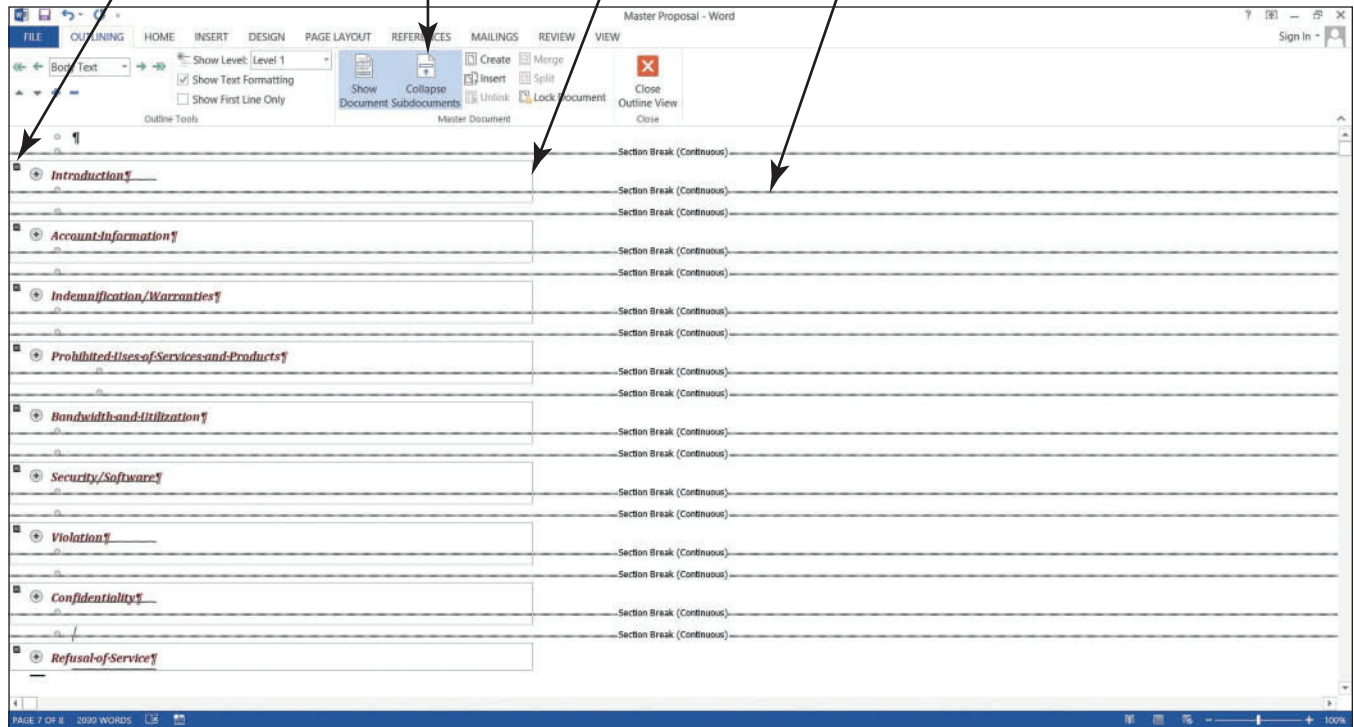
Document with subdocuments

Subdocument icon. When you click the icon, the subdocument heading and contents are selected

A border is placed around the subdocument after it is created

Collapse Subdocuments button becomes active after a subdocument is created

Continuous section breaks are automatically inserted to separate subdocuments



PAUSE. LEAVE the document open to use in the next exercise.


Saving Subdocuments

The next step is to save the master document with the subdocuments. Word automatically creates a filename for each of the subdocuments based on the text formatted with the heading styles. It saves them as a separate file, but in the same folder. For example, the document that you are working on contains many headings with a Heading 1 style applied to them. Figure 12-4 shows each of the headings in the document. When the master document is saved, each of the headings and the text under the heading is saved into a separate file automatically. In this exercise, you learn to save the master document with the subdocuments.

STEP BY STEP

Save Subdocuments

USE the document that is open from the previous exercise.

1. Click the **SAVE**  button on the Quick Access Toolbar to save the **Master Proposal** document and the created subdocuments.

Word saves each subdocument as a separate file based on the heading style (Heading 1) that was applied to the document. Each of the subdocuments are linked to the master document.

2. **CLOSE** the master document.

PAUSE. LEAVE Word open.

STEP BY STEP**View the Subdocuments in the Master Folder****1. OPEN** the *Master Hosting* folder.

You started with one file in your *Master Hosting* folder and now you have several subdocuments in the folder. When subdocuments are created and then saved, Word automatically saves each subdocument as a separate file. Word uses the text within the heading as the filename.

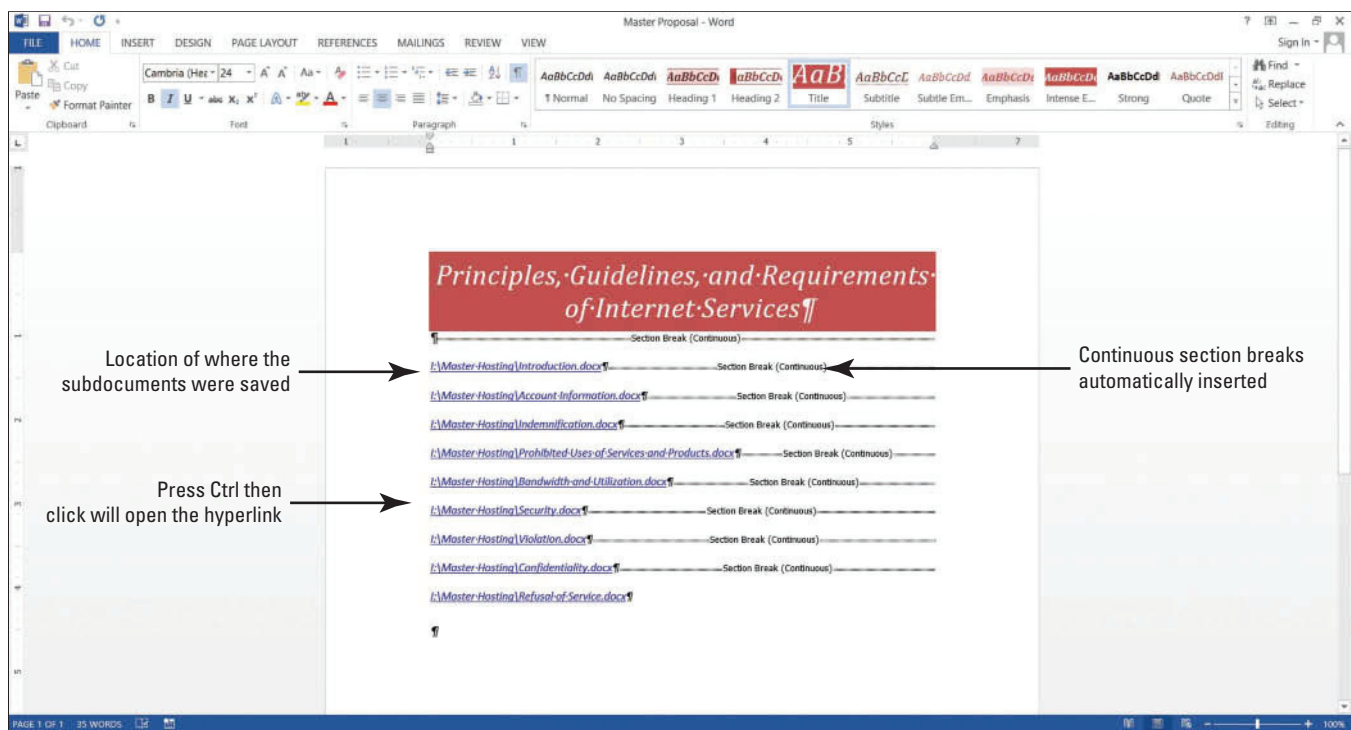
**2. OPEN** the *Master Proposal* document. The document opens in Print Layout view.

When opening a master document, the subdocuments show the location in a hyperlink to the file. You see your flash drive letter followed by the *Master Hosting* folder and then by the subdocument filename. By default the subdocuments are locked and collapsed.

Figure 12-6 displays the document with the location of the saved subdocuments with hyperlinks.

Figure 12-6

Master document with subdocuments

**3. When you are ready to follow a link in Word, press **Ctrl**, and then click one of the links.**

Each hyperlink goes directly to the subdocument when you click on the link. Later in this lesson, you open a subdocument.

PAUSE. LEAVE the document open to use in the next exercise.

Expanding and Collapsing Subdocuments

To view the master document with its contents, click the Expand Subdocuments button on the Outlining tab. Once the Expand Subdocuments button is clicked, you can switch views and the document remains expanded. The Collapse Subdocuments button closes the subdocuments. In this exercise, you expand and collapse subdocuments.

STEP BY STEP**Expand and Collapse Subdocuments**

USE the document that is open from the previous exercise.

1. Change the view of the document to **Outline**.

With the Outlining tab open, you can now work with the buttons in the Master Document group.

2. Click the **Expand Subdocuments**  button and notice that all subdocuments are shown along with their contents (see Figure 12-7).

Each heading and its contents now appear. Now that the subdocuments are expanded the Expand Subdocuments button is replaced with the Collapse Subdocuments button.

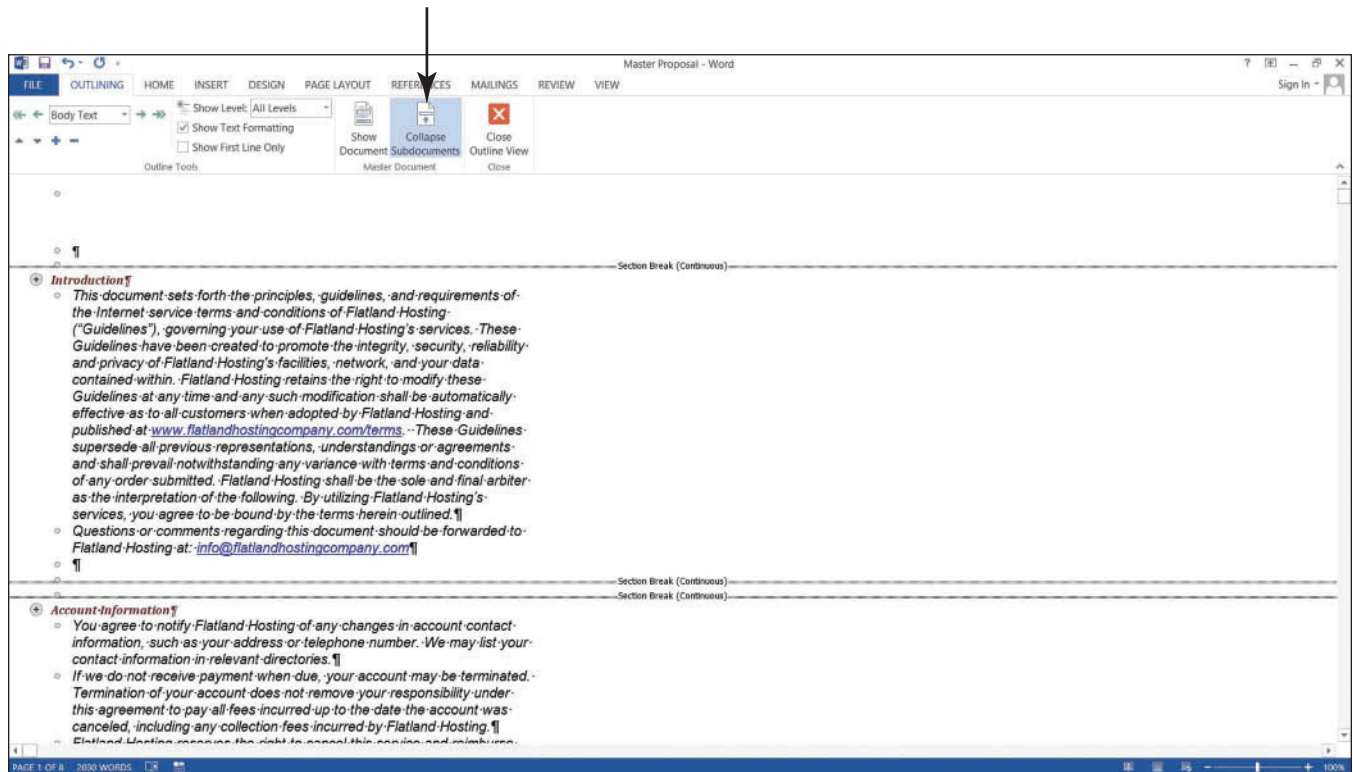
**Troubleshooting**

If you do not see the headings and contents in a border, click the Show Document button in the Master Documents group.

Figure 12-7

Subdocuments expanded

When subdocuments are expanded,
the Collapse Subdocuments button appears on the Ribbon



3. Click the **Collapse Subdocuments**  button to collapse each of the subdocuments. The Expand Subdocuments button appears again.

PAUSE. LEAVE the document open to use in the next exercise.

Promoting and Demoting Subdocuments

When you rearrange levels in a master document, you move the subdocument heading to another level by using the commands in the Outlining tab by either promoting or demoting the level. For instance, to move a topic in the paper under another heading, you demote that heading. As you continue working on your research paper, you come to realize that the Heading 1 style applied to

one of the headings should be a Heading 2. In the Outlining tab, you have options to change the levels of the headings by using the promote or demote buttons. It is easy to demote a Level 1 to a Level 2 or vice versa. So in this case, you demote the Level 1 to a Level 2. In this exercise, you learn to use promote and demote buttons.

STEP BY STEP

Promote and Demote Subdocuments

USE the document that is open from the previous exercise.

1. Click the **Expand Subdocuments**  button to expand all subdocuments.

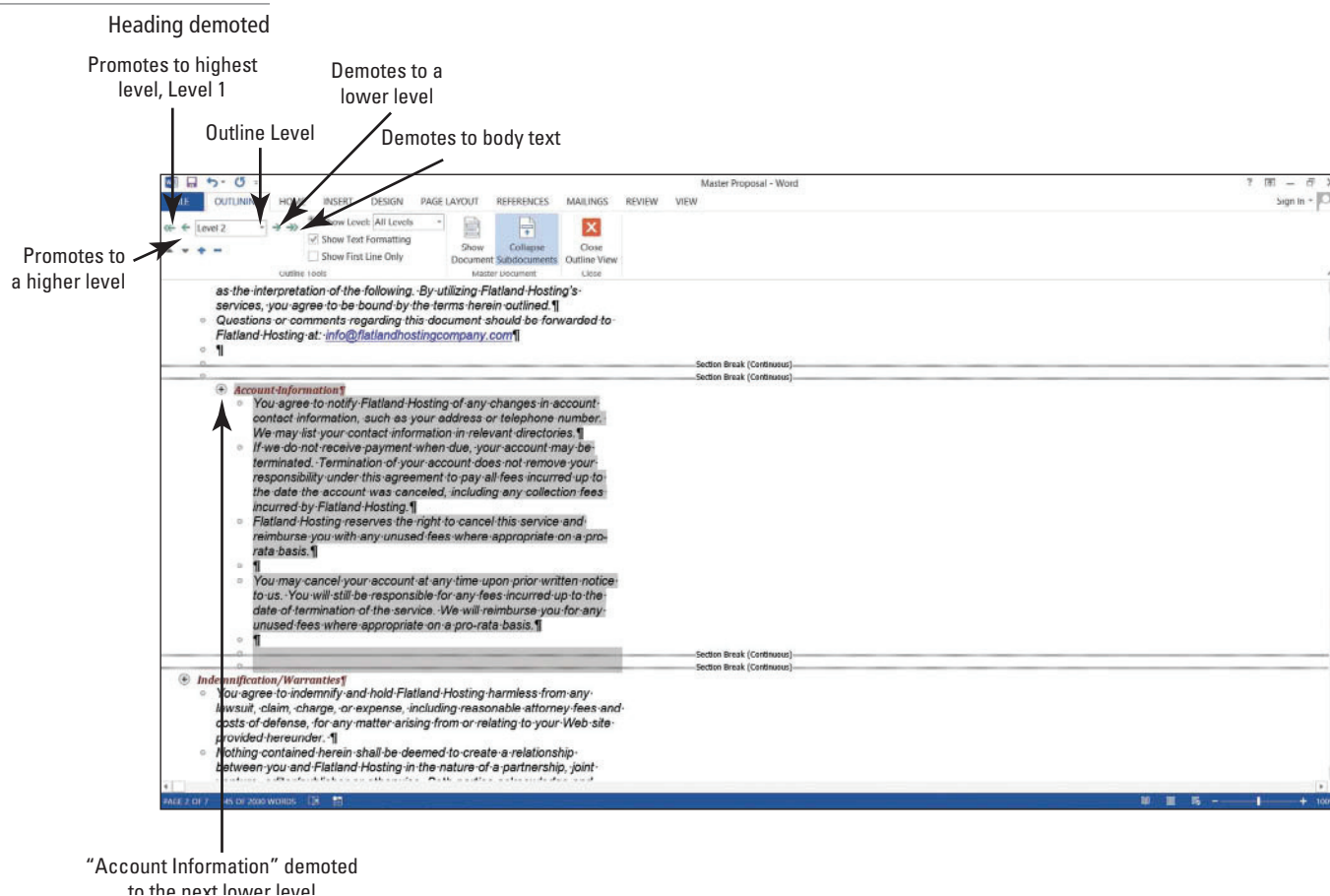
Point at the **plus (+) symbol** next to the *Account Information* heading—notice that the mouse pointer changes to four arrows.


2. Click the **plus (+) symbol** once to select the heading and all the contents within the subdocument.

3. In the Outline Tools group, click the **Demote**  button once.

Did you see the Outline Level box change from a Level 1 to a Level 2? The *Account Information* has been demoted to a Level 2 as shown in Figure 12-8.

Figure 12-8



4. With the *Account Information* subdocument still selected, click the **Promote**  arrow once.

The *Account Information* has been promoted back to a Level 1. Demote back to a Level 2.



Another Way

You can click the drop-down arrow by the Outline Level box to select the level.

5. Click the **SAVE button** on the Quick Access Toolbar. The master document is saved with the updated changes.

PAUSE. LEAVE the document open to use in the next exercise.


Reorganizing Subdocuments

Subdocuments can be rearranged within the master document. The order of subdocuments can be changed by moving the subdocuments from one location to another using the command buttons on the Outlining tab or by dragging and dropping. Once you move a subdocument, you need to unlink it and recreate it. You can also merge two or more subdocuments into one subdocument. In this exercise, you reorganize subdocuments.

STEP BY STEP

Reorganize Subdocuments

USE the document that is open from the previous exercise.

1. Deselect *Account Information* by clicking in a blank area of the document screen.
2. Add a check mark next to **Show First Line Only**.
This displays a few lines for each of the subdocuments and hides the remaining content—making the subdocuments more manageable.
3. Scroll down and click to select the **plus (+) symbol** by the *Security/Software* heading and its contents.
4. Click the **Show Document button** to display the additional commands in the Master Document group.
5. On the Outline Tools group, click the **Move Down**  **button** (four times) until the heading is positioned below the continuous section break below *Violation*.
Hint, two continuous section breaks should appear above *Security/Software*.
The *Security/Software* subdocument is surrounded by a border, which extends to the *Confidentiality* subdocument.
6. **Delete** the two continuous section breaks under *Security/Software* and *Confidentiality*.
Deleting these continuous section breaks makes it easy to unlink the subdocuments.

PAUSE. LEAVE the document open to use in the next exercise.



Another Way

Click the subdocument icon to select the heading and contents, and drag and drop to the new location.

STEP BY STEP

Unlink Subdocuments

USE the document that is open from the previous exercise.


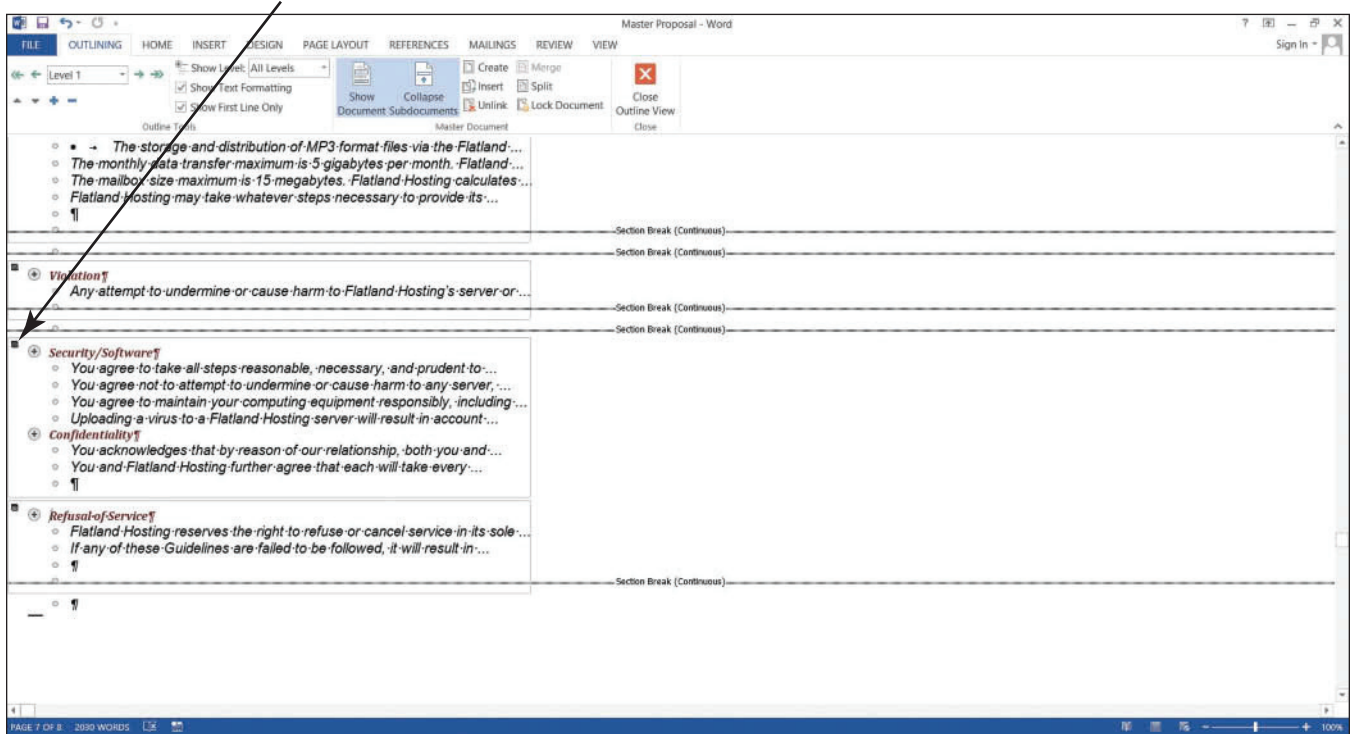
Currently, there is only one subdocument  icon for both levels as shown in Figure 12-9. Both of these subdocuments are linked to the master document and must be unlinked to create separate subdocuments.

Figure 12-9

Repositioned subdocuments

Repositioning subdocuments places a border around two subdocuments and displays one subdocument icon



1. Click the **plus (+) symbol** by *Security/Software* to select it, and then click the **Unlink** button.

The subdocument icon disappears.

2. Click the **Create** button to create a subdocument.

This places a border around this level and the subdocument icon appears.

3. Click the **plus (+) symbol** by *Confidentiality*.
4. Check whether the Unlink button is showing. If it is, then click **Unlink**, and then click **Create**. If the Unlink button is not displayed, click just the **Create** button.

5. Click the **check box** to turn off *Show First Line Only*. Change the Level to display only **Level 1**.

Changing the display of the level makes it more manageable to create a subdocument and see the borders around each of the subdocuments.

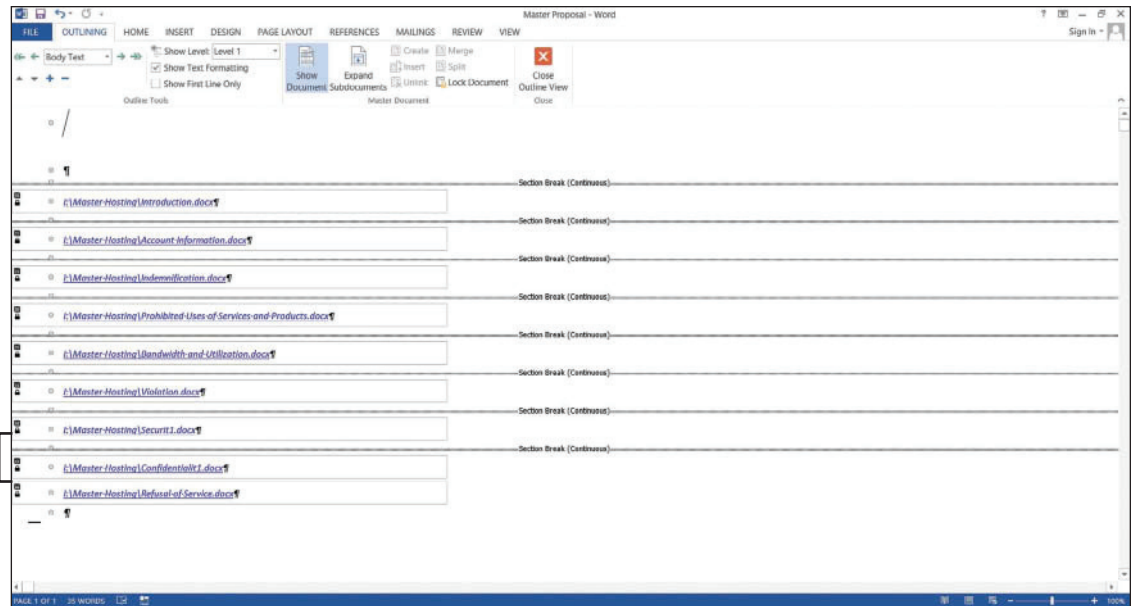
6. Click the **Collapse Subdocuments** button and a prompt appears asking *Do you want to save changes to the master document "Master Proposal."* Click **OK**.

Your screen should match Figure 12-10. Word automatically saves the subdocument with a new filename and drops the last character of the filename and adds a *1* at the end. The two additional files that you see in your flash drive are *Securit1* and *Confidentialit1*. Each time you create a subdocument, it is automatically linked to the master document and the original subdocuments are no longer linked to the master document.

Figure 12-10

Master document with
hyperlinks with repositioned
subdocuments

Subdocuments
that have been
rearranged are
automatically given
a new filename



PAUSE. LEAVE the document open to use in the next exercise.

Editing an Individual Subdocument

Subdocuments can be edited directly in the master document, or you can open the subdocument as a separate file in its own window. In this exercise, you edit a subdocument separately and within the master document.

STEP BY STEP

Edit an Individual Subdocument

USE the document that is open from the previous exercise.

1. Point to the *Master Hosting/Introduction* subdocument hyperlink, press **Ctrl** and **Click** to follow the hyperlink and open the subdocument in a separate window. It is now ready for editing and formatting.
2. You will edit text in the first and second sentences. Select *principles, guidelines, and requirements* from the first sentence. In the second sentence, select *integrity, security, reliability, and privacy*. All seven words should be selected.



**Cross
Ref**

In Lesson 2, you learn to select text using different methods. To select multiple areas of text, press CTRL and select the text.

3. **Bold** the selected text, and then change the font color to **dark red**.
4. Click **SAVE** on the Quick Access Toolbar; then close the *Introduction* subdocument file. If prompted to save changes, click **SAVE**.
5. Click the **Outlining tab** to make it available with its commands.
6. In the Master Document group, click the **Expand Subdocuments** button.

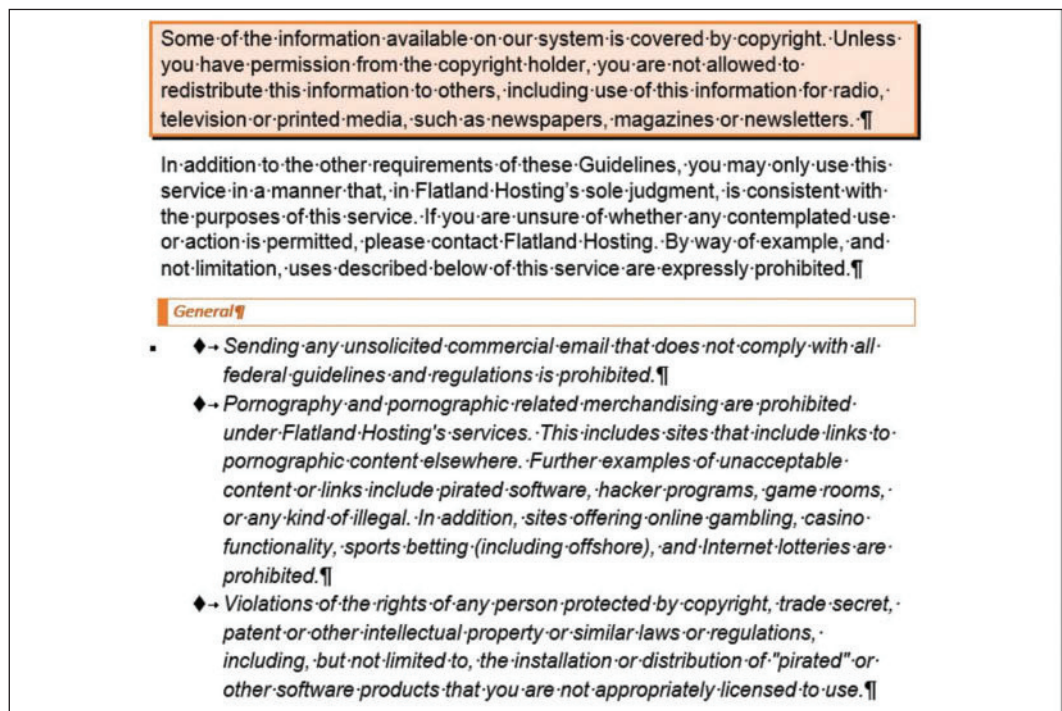
Notice the bolded dark red text under the *Introduction* heading. Changes made in the *Introduction* subdocument automatically update the master document.

7. Click the **Close Outline View button** to take you to the Print Layout view.
8. Scroll down to page 3.
9. Under the heading, *Prohibited Uses of Services and Products*, select the second paragraph.
10. From the Design tab, select **Page Borders**.
11. Add a border around the paragraph by selecting the **Borders tab** to make it active.
12. Under the Setting section, select **Shadow**. Change the *Width* to **2¼**, and then apply **Red, Accent 2 color**.
A colored border with a 2¼ width is applied to the paragraph.
13. Click the **Shading tab**, and then select the fill color **Red, Accent 2, Lighter 80%**.
A shading is applied to the paragraph within the border.
14. Click **OK**.
15. Under the headings, *General*, *System and Network*, and *Billing*, select the contents with bullets.
16. Change the bullets to the solid diamond. The bullets have been replaced with the new bullets on the selected text.
17. **SAVE** the **Master Proposal** document, and then close the file. You have completed editing the master document.
18. To view an independent subdocument, open the **Prohibited Uses of Services and Products** subdocument from the *Master Hosting* folder. The changes that you made in steps 10–16 are shown in the subdocument as shown in Figure 12-11.



Figure 12-11

Subdocument with changes



19. **CLOSE** the document.

LEAVE Word open.

SOFTWARE ORIENTATION

Recording Macros

Do you find yourself performing the same task in Word over and over again? If so, recording macros simplifies your task. You belong to the Lakeville.NET User's Group, and you are responsible for providing everyone with copies of upcoming workshops. You bring together the skills that you have learned from other lessons to record a macro. For instance, in Lesson 6, you learn to create and format tables, and use formulas within the tables. You're always on the go and now you find yourself in a situation where you are not accomplishing much because of repetitive tasks. It is essential that you learn about macros to help you manage your time more wisely, increase productivity, and still have time for yourself. In this exercise, you learn to record and run a macro.

RECORDING MACROS

The Bottom Line

A **macro** is a recorded sequence of commands to automate a task. It is a series of commands and actions that can be recorded and run whenever you need to perform the task. When a macro is created, you can run it manually or assign it to run whenever a specific key or series of keystrokes are pressed.

STEP BY STEP

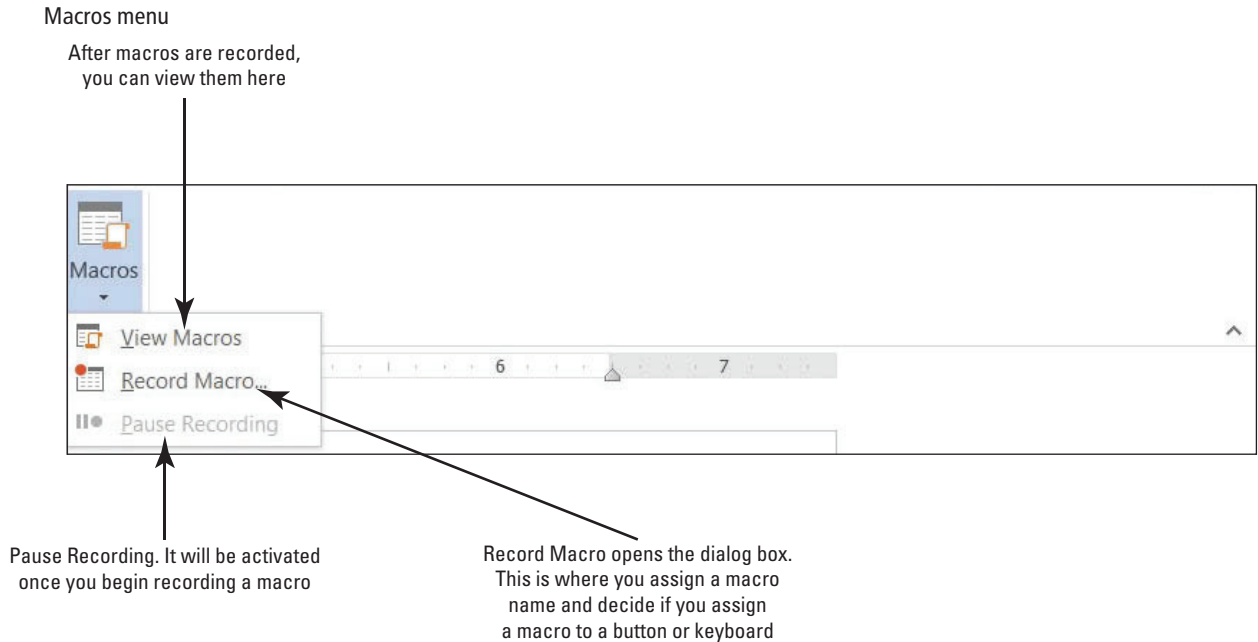
Assign Shortcut Keys

A keyboard shortcut is a combination of two or more keys to perform a specific action. In the lessons that you have already covered, you applied a keyboard shortcut to open a new document by pressing **Ctrl+N** or to bold text by pressing **Ctrl+B**. Word contains many different shortcuts and these shortcuts are assigned to a specific action to perform, therefore, cannot be used.



GET READY. If necessary, before you begin these steps, **LAUNCH** Word.

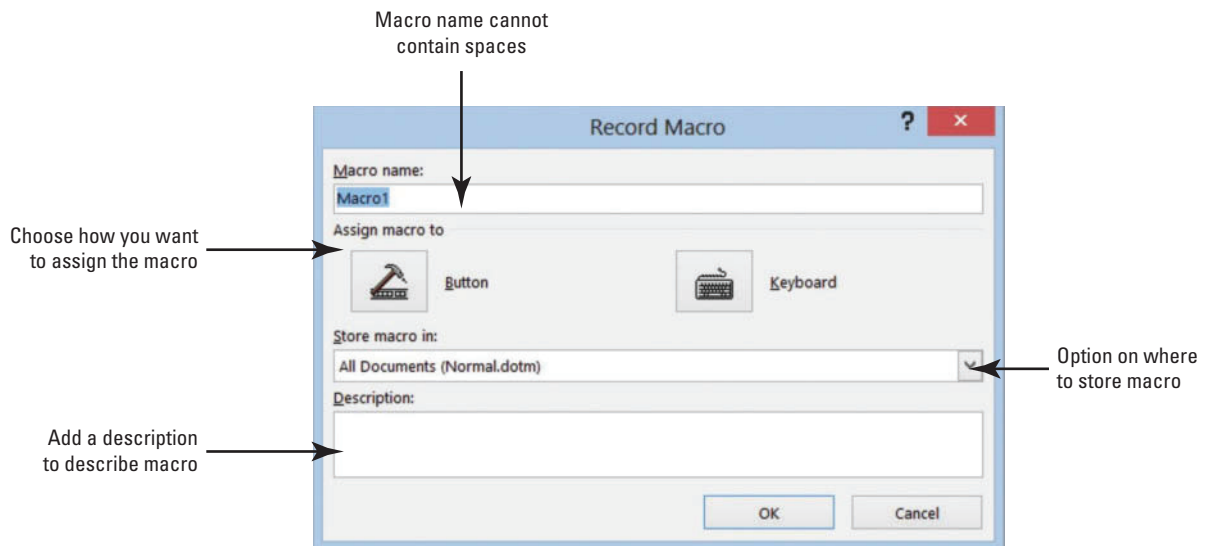
1. **OPEN** a blank document.
2. In the View tab, click the drop-down arrow by *Macros* to produce a menu (see Figure 12-12).

Figure 12-12

3. Click **Record Macro** to open the *Record Macro* dialog box. In the dialog box, you need to assign a name to the macro and decide which option to use to assign a macro. You have two choices as shown in Figure 12-13. You can assign a macro by button or by keyboard.

Figure 12-13

Record Macro dialog box



4. In the Macro name box, type **Upcoming_Workshops**.
Spaces are not allowed; you need to add an underscore. Adding a number at the end of the macro name is also valid.
5. Keep the default setting for *Store macro in*.
It will be stored in *All Documents (Normal.dotm)*.
You want it stored there because you will access this macro on a monthly basis. If someone else is working on your computer and you've provided this person with the

keyboard shortcut, he or she too can access the macro. (Hint: You can add the shortcut key in the description, in case you forget it or want to share it.)

The first macro will be assigned to a keyboard command. This means whenever you press the keyboard commands, the macro will run.

Before you click the Keyboard button, you want to add a description to the macro.

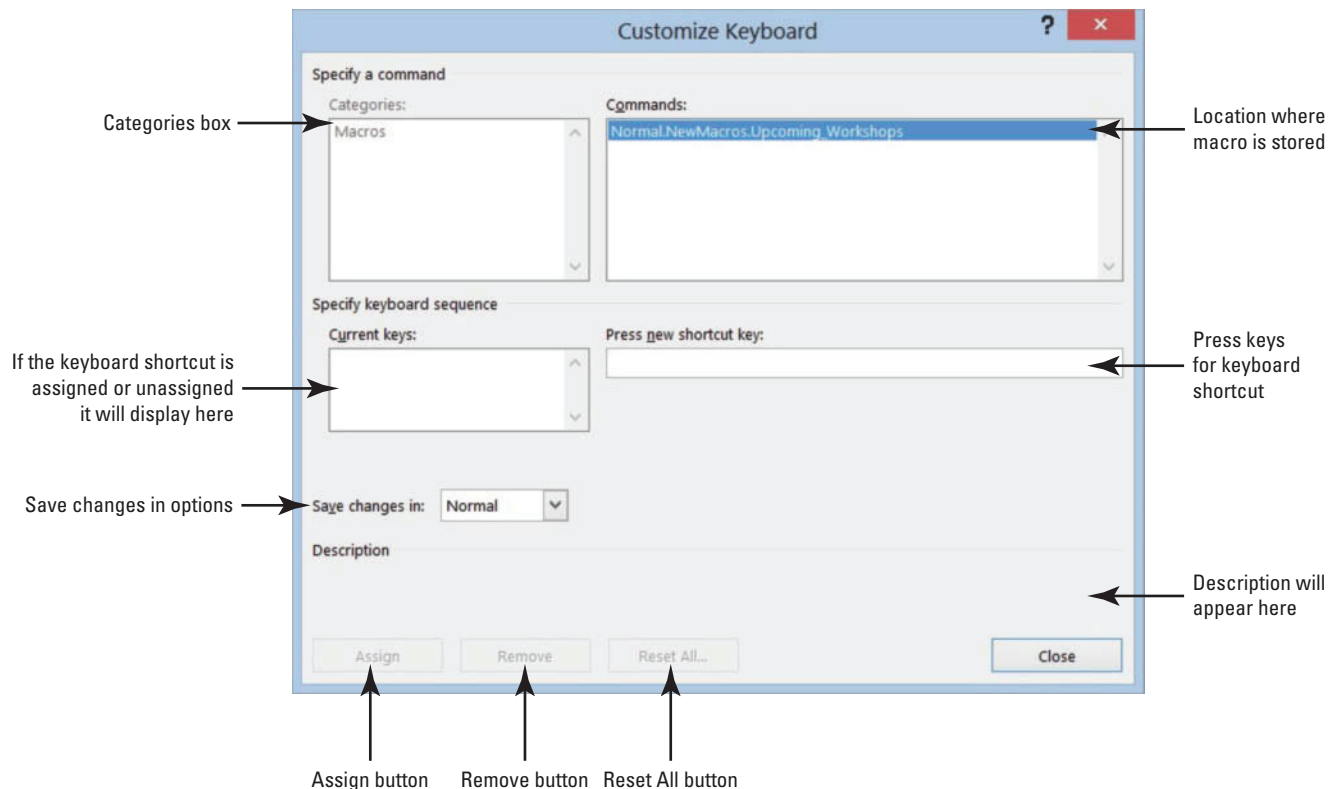
6. In the Description box, type **Use this table for all upcoming workshops.**

7. Click the **Keyboard button** to open the *Customize Keyboard* dialog box as shown in Figure 12-14.

In the Commands box, the macro is stored in *Normal.NewMacros.Upcoming_Workshops*. This shows the location of where the macro will be stored.

Figure 12-14

Customize Keyboard
dialog box



8. It's time to see whether a keystroke has been assigned to another command. In the *Press new shortcut key* box, press **Ctrl+T** (do not type the plus symbol).

This shortcut key is already assigned to the HangingIndent command as shown in the dialog box.

9. Press **Backspace** to remove *Ctrl+T*.

Let's try another shortcut key.

10. Press **Ctrl+Alt+T**.

And again, this shortcut key is already taken by the TM Trademark command. It may take you several attempts to find an unassigned shortcut key.

11. Press **Backspace** to remove *Ctrl+Alt+T*.

12. Press **Alt+T**.

Notice that this keystroke is not assigned.

13. Click the **Assign button** to assign this shortcut key to the new macro. The *Alt+T* command is moved to the *Current keys* box for this macro.

The changes will be assigned in the Normal template instead of Document1. This macro will be saved on the computer that you are recording the macro and can be accessed by anyone who is working on your computer.

Take Note Word allows you to override assigned keyboard keys, but you don't want to do that. Find one that is unassigned.

**CERTIFICATION
READY?** 1.4.9

How do you assign a keyboard shortcut to a macro?

14. Click **CLOSE**.

PAUSE. LEAVE Word open for the next exercise.

Recording a Macro

Once you determine which method to assign the macro, the next step is recoding your steps. While Word is recording a macro, you see the mouse pointer change to a recording pointer on your screen. At this point, every keystroke and mouse click is recorded. When working with macros, you cannot use the mouse to select text. In this exercise, you learn to record your steps to create and format a table.

STEP BY STEP

Record a Macro

The Record button has been enabled and you should see the mouse pointer change to a recording pointer on your screen. As long as you see the icon on your document screen, you are still recording your steps. If you need to take a break, click the *Pause Recording* command in the Macros menu. If you pause during a macro, you can return by clicking *Resume Recorder*.

GET READY. USE the document that is **Table** and then click open from the previous exercise.

1. Click the **Insert tab**, and then click **Insert Tables** to open the dialog box.
2. Create a table that contains **4** columns and **7** rows. Click **OK**.



**Cross
Ref**

In Lesson 6, you learn to create tables using various methods and format using Tables Tools.

3. Type the information as shown in Figure 12-15.

Because you are recording a macro, you need to press **Tab** to move between cells and press **Shift+Tab** to move back.

Figure 12-15

Upcoming Workshop document

Workshop-Name	Date	City	Cost
Word-2013	February-20,-20XX	San-Antonio,-TX	\$495
Excel-2013	March-15,-20XX	Dallas,-TX	\$495
PowerPoint-2013	April-28,-20XX	Frisco,-TX	\$495
Access-2013	May-15,-20XX	San-Antonio,-TX	\$495
Outlook-2013	June-11,-20XX	Austin,-TX	\$495
MOS-Exams	July-30,-20XX	San-Antonio,-TX	\$650

4. After you type the data, click the **Layout tab** from the Tables Tools and Select Tables. While you are recording a macro, you cannot use your mouse to select text or tables. The whole table is now selected.

5. In the Table Styles group of the Design tab, click the **More button** to display the gallery.
 6. In the Grid Tables group, select **Grid Table 4 – Accent 6** to apply a style to the table.
 7. Use the arrow keys on the keyboard to move up to the first row that contains the headings.
 8. On the Layout tab, click **Select** in the Table group and choose **Select Row**, and then select **Align Center**. For now, these are the only changes you will record for this macro.
 9. The next step is to stop recording. Click the View tab, click **Macros**, and then click **Stop Recording**.
- You recorded your first macro and will be able to access it quickly. If you share your computer with another individual, this person too can use the keyboard shortcut to apply the macro as long as you provide him or her with the shortcut key. This table can be used for all upcoming workshops—all you have to do is change the data.
10. **CLOSE** the document without saving. (Hint: When a warning prompt appears, click **Don't Save**.)

**CERTIFICATION
READY?** **1.4.8**

How do you record a macro?

PAUSE. LEAVE Word open for the next exercise.

Running a Macro

Once a macro is recorded, you can press the keyboard shortcut to run it in a blank or existing document. In this exercise, you learn to run your macro in a blank document.

STEP BY STEP

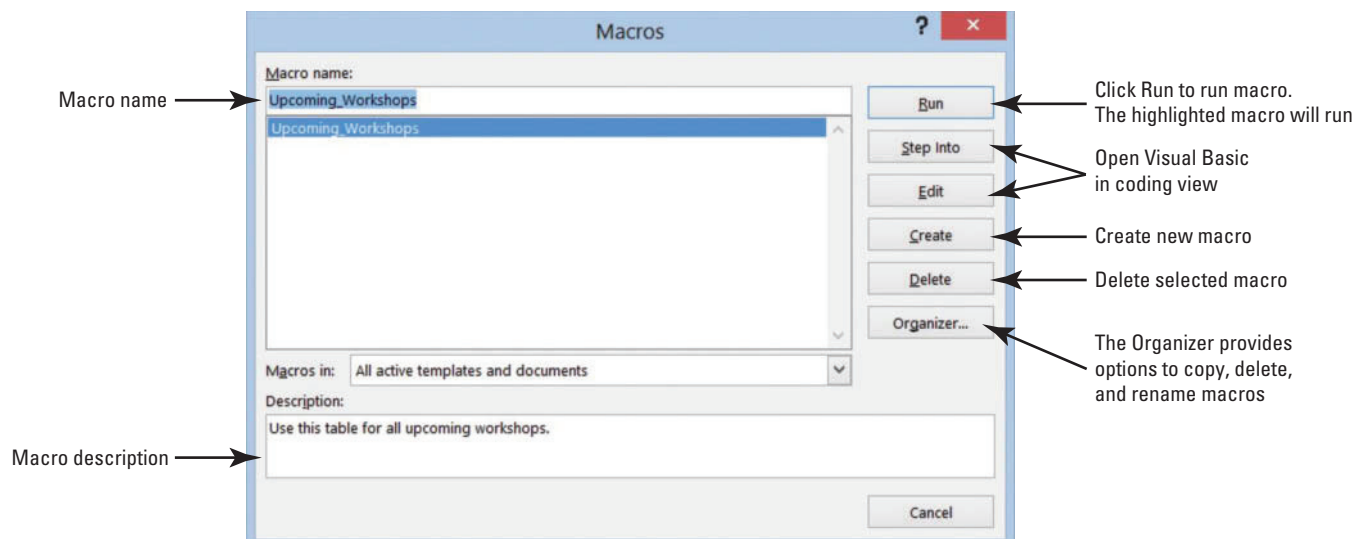
Run a Macro

OPEN a blank document.

1. Press **Alt+T**. The table automatically appears on your document screen.
When you need to work on this table, you can now access it quickly, edit the data, and then save with a new filename.
2. **SAVE** the document as **Upcoming Workshops** in the lesson folder on your flash drive, and then **CLOSE** the file.
3. **OPEN** a blank document.
Now, let's run the macro again another way.
4. On the View tab, click **Macros**, and then click **View Macros** to open the *Macros* dialog box as shown in Figure 12-16.

Figure 12-16

Macros dialog box



5. Click **Run**. The table appears on the document screen.

Additional commands are available in the dialog box and will not be discussed in this lesson. Some of these commands open the Visual Basic Application—this is where you can create or edit a macro. If you accidentally open it, just close the application.

6. **CLOSE** the document without saving.

PAUSE. LEAVE Word open for the next exercise.



Troubleshooting

Creating and running a macro takes practice. If your macro does not run correctly, delete the macro and repeat your steps from the beginning.

Deleting a Macro

You determine you no longer need this macro and want to delete it. In this exercise, you learn to delete a macro.

STEP BY STEP

Delete a Macro

OPEN a blank document.

1. On the View tab, click **Macros**, and then click **View Macros** to open the *Macros* dialog box (refer to Figure 12-16).
2. Select the macro, and then click the **Delete button**.
3. A warning prompt appears asking *Do you want to delete macro Upcoming_Workshops?*
4. Click **No**. You can return later to delete. Click **Cancel**.

PAUSE. LEAVE Word open for the next exercise.

SOFTWARE ORIENTATION

Controlling Macro Security

You learned to streamline your work using macros. Now, you are concerned about how security works with macros. Macro security involves active content in files that might come from a site that has no digital signature or from someone who has written code with a virus. If someone sends you a document and it contains macros with active content, it might pose a security risk and harm your computer. A **hacker** is a person who writes malicious programs such as viruses intended to harm your computer or access your data illegally. Every day we hear about hackers breaking into large companies and accessing confidential information. Organizations have security in place to identify and stop anyone from accessing data from their network; so, it's important to know, when working with macros, who your trusted sources are. Word has a macro virus security that comes from trusted sources and locations. This macro security determines whether the macro is safe to run on your computer. You want reassurance that macros coming from other sources are from a trusted publisher. A **digital signature** is a code digitally signed by a company or person. You can create your own digital signature but it wouldn't be issued from a trusted certificate authority. In this exercise, you learn to review the securities on your system.

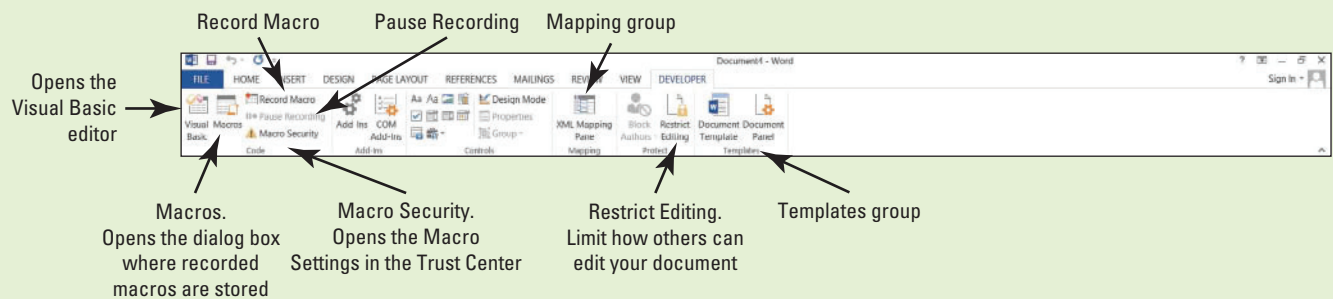


Figure 12-17
Developer tab

Use this figure as a reference throughout this lesson as well as the rest of this book.

MONITORING MACRO SECURITY

The Bottom Line

Macro security has preventive measures in place to determine whether a macro source is safe to run.

STEP BY STEP

Review Macro Security Settings

GET READY. If necessary, before you begin these steps, **LAUNCH** Word.

1. From the File tab, select **Options** on the Backstage page.
2. Select **Trust Center** from the *Word Options* dialog box.

In the *Trust Center* screen, Microsoft has provided links to articles on protecting your privacy, computer, and security. At your leisure, take time to read these articles.

3. Click the **Trust Center Settings** button to open the *Trust Center* screen. In the left pane, *Macro Settings* is highlighted.

This is where you manage how macros run. You can choose to disable all macros with or without notification, disable all macros with the exception of those that are digitally signed, or enable all macros that could harm your computer.

**CERTIFICATION
READY?** 1.4.10

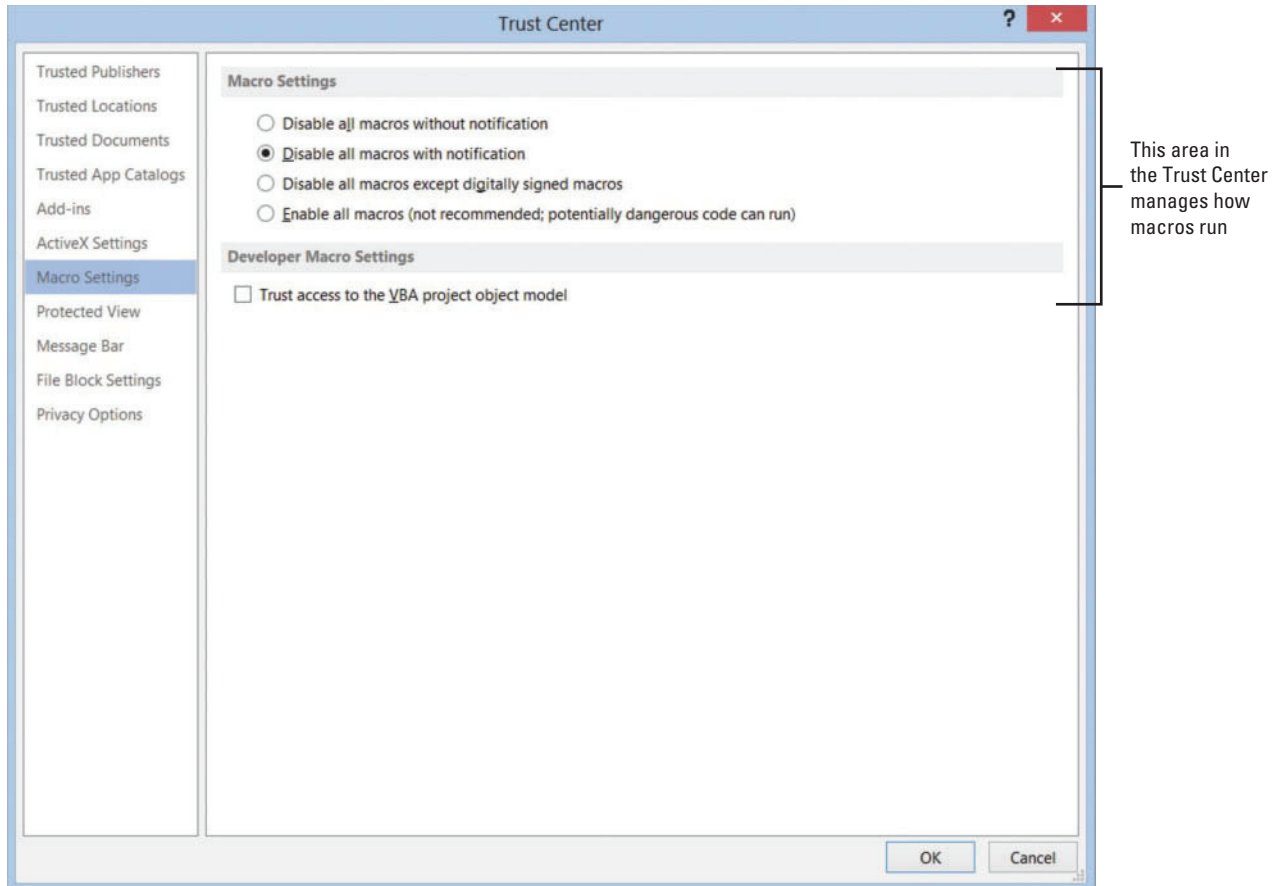
How would you change the macro settings?

Adding a check mark by *Trust access to the VBA project object model* allows access to the Visual Basic for Applications object model. Leave the settings at the default settings (see Figure 12-18).

4. Click the **Cancel** button to exit the *Trust Center* dialog box.

Figure 12-18

Trust Center



PAUSE. LEAVE the Word Options dialog box open to use in the next exercise.

Now you will learn to add the Developer Tab to the ribbon.

STEP BY STEP

Review the Developer Tab

GET READY. USE the document that is open from the previous exercise.



1. Click **Customize Ribbon** on the left pane.

This screen is where you customize the Ribbon or, in this case, turn on a Ribbon tab that is off by default.



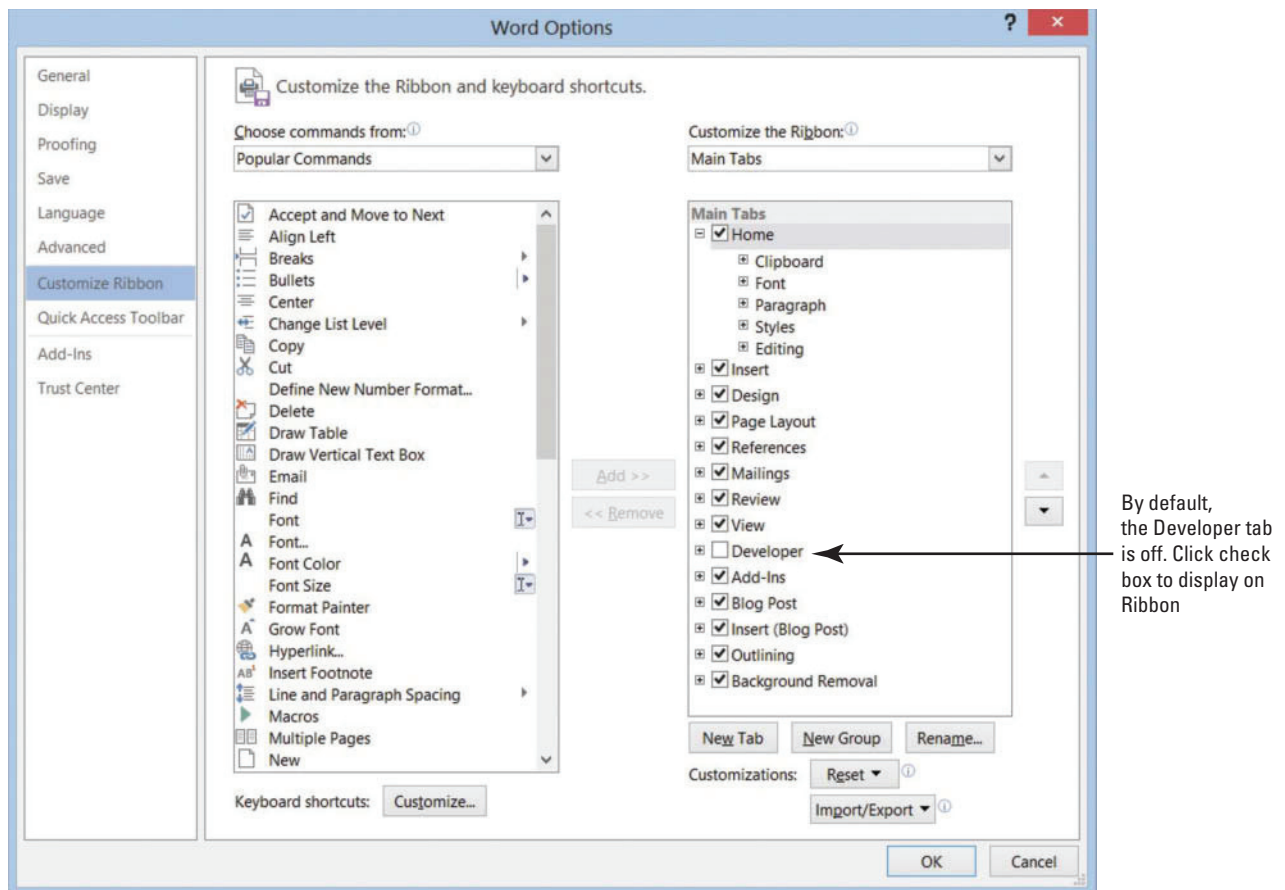
**Cross
Ref**

In Lesson 14, you learn to customize the Ribbon with your favorite commands.

2. Under *Customize the Ribbon*, select the check box by *Developer* (refer to Figure 12-19).
3. Click **OK**.

Figure 12-19

Customize Ribbon



4. Click the **Developer tab** to display the groups and commands.

The Developer tab contains commands that are used with macros, which includes codes, templates, controls used in forms, add-ins, and more (refer to Figure 12-17 for details on the Developer tab).

Previously, you opened the *Macros* dialog box to run a macro that you created. From the Developer tab, the *Macros* dialog box can be accessed in the Code group by clicking the **Macros button**. In the same group, you can record a macro and pause a recording—these are the same commands from the Macros group in the View tab.

Clearly the Developer tab contains more commands. The Macro Security button opens the Trust Center. This displays the macro settings for your computer. If you have a programming background or feel comfortable writing code, you can write your own macro using the Visual Basic editor.

**CERTIFICATION
READY?**

1.4.10

How would you manage
macro security?

CLOSE Word.

Take Note

To find additional information on macros, use the Help feature by pressing the *FI* button or click the *Help* icon.

SKILL SUMMARY

In this lesson you learned to:	Exam Objective	Objective Number
Arrange Document Views		
Record Macros	Assign shortcut keys. Record simple macros	1.4.9 1.4.9
Monitor Macro Security	Manage macro security.	1.4.10

Knowledge Assessment

Multiple Choice

Select the best response for the following statements.

- Where can you open Trust Center settings?
 - Backstage
 - Developer tab
 - View tab
 - a and b
- Microsoft will protect your:
 - privacy.
 - computer.
 - unsafe sources.
 - a and b
- By default, how many levels does the Outline View contain?
 - Nine
 - Eight
 - Seven
 - Five
- Clicking the Show Document button in the Outlining tab displays:
 - Backstage view.
 - more commands.
 - Create.
 - None of the above
- Clicking the Expand button will:
 - show all the text in the subdocument.
 - close the subdocument.
 - open only the selected content.
 - a and c
- To view the hyperlinks in the subdocuments, you must:
 - open the master document after creating and saving the subdocument in the master document.
 - open the original document.
 - open the individual subdocuments separately.
 - None of the above
- Macros are used for:
 - boring work.
 - research papers.
 - repetitive work.
 - work that is not performed daily.
- A macro that has been assigned a keyboard shortcut can be run in:
 - a blank document.
 - an existing document.
 - a template.
 - All of the above

9. When assigning a keyboard shortcut, it is recommended that you use one that is:
 - a. assigned to a command.
 - b. designated to a command.
 - c. already used.
 - d. unassigned.
10. Which one of these keyboard shortcuts are not assigned?
 - a. Ctrl+B
 - b. Ctrl+I
 - c. Ctrl+H
 - d. Alt+Q

True/False

Circle **T** if the statement is true or **F** if the statement is false.

- T F** 1. A subdocument contains the whole document.
- T F** 2. Macros will not automate tasks.
- T F** 3. When you create subdocuments, they are saved with the master document.
- T F** 4. When recording a macro, you can format a document with many features to enhance the document.
- T F** 5. When assigning a name to a macro, spaces can be used.
- T F** 6. A master document can be reorganized.
- T F** 7. Moving a subdocument to another location in the master document still retains it as a subdocument.
- T F** 8. Short essays should be separated into subdocuments.
- T F** 9. If you plan to create subdocuments, identifying the heading should be the first step especially if the document does not already contain heading styles.
- T F** 10. Macros can be accessed in both the View and Developer tabs.

Competency Assessment

Project 12-1: Creating a Simple Macro

In your job at Books and Beyond, you continue to work on documents that will be part of the employee handbook. You create a simple macro to be used for this employee handbook. In this project, you apply skills that you have learned from previous lessons.

GET READY. LAUNCH Word if not already running.

1. **OPEN** a blank document.
2. On the View tab, click **Macros** and then click **Record Macro** in the Macros group.
3. Type the information in the appropriate box:
 Macro name: **Books_and_Beyond**
 Description: **Formatted report for B&B handbook.**
4. Click **Keyboard** and in the *Press new shortcut key* box, type **Alt+L**. This is an unassigned shortcut key.
5. Click **Assign**, then click **Close**.
6. In the Design tab, select the **Basic (Stylish) Style Set** from the Document Formatting group.
7. Type **BOOKS AND BEYOND**. Apply **Heading 1** from the Styles group on the Home tab.
8. Press **Enter** once.
9. Type **Second section heading**.
10. Select **Heading 2**.
11. Press **Enter** twice.

12. Type **Third section heading**.
13. Select **Heading 3**.
14. Press **Enter** twice.
15. Click **Stop Recording** from the Macros group on the View tab.

CLOSE the document without saving. **LEAVE** Word open for the next project.

Project 12-2: Creating Separate Files for the Books and Beyond Master Document

You work at Books and Beyond and your manager has asked you to work with this document and create separate files from the master document. In your computer class, you learned about master documents and how Word automatically saves subdocuments.



GET READY. LAUNCH Word if not already running.

1. **OPEN** *Books Beyond* from the lesson folder.
2. From the File tab, click **Save As**.
3. Click Browse and use the scroll bar to locate your flash drive. In the *Save As* dialog box, click **New folder** and name it **BOOKS BEYOND**.
4. In the File name box, type **Master Books** and save it in the *BOOKS BEYOND* folder.
5. Select the heading, *Acknowledgement*, and format with the **Heading 1** style.
6. Select the *Introduction* heading and format with the **Heading 1** style.
7. Select the *General Performance Expectation Guidelines* heading and format with the **Heading 1** style.
8. On the View tab, click the **Outline button**.
9. In the Outline Tools group, click the **drop-down arrow** by *Show Level* to display *Level 1*.
10. Click the **plus (+) symbol** next to *General Performance Expectation Guidelines*.
11. Click the **Demote button** to change the level for the *General Performance Expectation Guidelines* heading.
The heading is now a Level 2.
12. Click the **Show Document button**.
13. Select the **plus (+) symbol** next to *Acknowledgement* to select the heading and contents under that header.
14. Click the **Create button** in the Master Document group.
15. Click the **plus (+) symbol** by *Introduction* to select the heading and contents under that heading.
16. Click the **Create button** in the Master Document group.
17. Click the **Save button** on the Quick Access Toolbar, and then **CLOSE** the file.
18. **OPEN** the *Master Books* document and preview your document in Print Layout view.
You should see two hyperlinks **CLOSE** the file.

LEAVE Word open for the next project.

Proficiency Assessment

Project 12-3: Running the Books and Beyond Macro

You are ready to run the macro created from Project 12-1.

GET READY. LAUNCH Word if not already running.

1. **OPEN** a blank document.
2. Press **Alt+L**.
3. **SAVE** the document as **12-3 B&B Report** in the lesson folder on your flash drive, and then **CLOSE** the file.

LEAVE Word open for the next project.

Project 12-4: Books and Beyond

In this project, you continue working with the files from Project 12-2.



GET READY. LAUNCH Word if not already running.

1. **OPEN** the **Introduction** document from the **BOOKS BEYOND** folder.
2. Use the Find and Replace command to find all occurrences of *Books and Beyond* and replace with **B&B**. Change the formatting and apply the **bold italic** style, font size **12** pt, underline style **Words only**, and **dark blue** font color. (There are 13 occurrences to find.)
3. Change all bullets to the number format and select **1**.
4. Change the number format listed under the *Set Alarm* and *Deactivate Alarm* headings to a solid circle bullet.
5. **SAVE** the document in the **BOOKS BEYOND** folder on your flash drive.
6. **OPEN** the **Master Books** document and change the view to **Outline**.
7. Press **CTRL+Click** to open the *Acknowledgement* link and select **I acknowledge** from the first paragraph and **I understand** from the fourth paragraph. **Bold** and change to uppercase.
8. **SAVE** the document in the **BOOKS BEYOND** folder on your flash drive, and then **CLOSE** both documents.



LEAVE Word open for the next project.

Mastery Assessment

Project 12-5: Creating a Macro with Formulas

Create a macro with formulas and format the table. Take a screenshot of the Macros dialog box to validate that you completed this project and provide a copy to your instructor.

GET READY. LAUNCH Word if not already running.

1. **OPEN** a blank document.
2. Create a macro, named **Expenses**, and in the Description box, type **Expense Report for trips**. Look for an unassigned shortcut key and assign it to this macro.
3. Create a table as shown in Figure 12-20, and then enter the data and apply the formatting.

Figure 12-20

Table document

Apply the Grid Table 5 Dark style →

Expense Report		
	Amount	Total Cost
Airline	\$675	\$675.00
Hotel (3 nights)	\$175	
Meals per diem	\$35	
Transportation (hotel/airport)	\$70	
Total		

← Merge, center, font size 26 pt, row height 0.8", align center

← Center, bold, font size 12 pt

↑ Key Total and align right

- In the first blank cell in the last column, use the Formula dialog box to calculate the hotel total cost. Delete the formula leaving the equal sign.
- Type **B4*3**. Click **OK**.
- Calculate the total cost for meals. Type **B5*3**.
- Calculate the total cost for transportation. Type **B6*2**.
- Calculate the grand total cost summing the previous values. Use the third option to format the number.
- Click **Stop Recording**.
- CLOSE** the document without saving.

LEAVE Word open for the next project.

Project 12-6: Running Macros and Showing Field Codes

In Project 12-5, you created a macro to prepare a table in a table format that contains formulas. In this project, your job is to run the macro and display the fields. Print a copy of both tables and submit to your instructor. Before closing your computer, change the display back to its default setting.

GET READY. LAUNCH Word if not already running.

- OPEN** a blank document.
- Run the macro.
- Change the display to show the field codes.
- SAVE** the document as **12-6 Expense Report** in the lesson folder on your flash drive.

CLOSE Word.