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*Popular author and Microsoft Word expert*

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### About the Author

**Katherine Murray** is a communications expert who specializes in teaching people and businesses how to improve their productivity with Microsoft technologies. She is the author of more than 50 books related to Microsoft Office, Web technologies, and the digital lifestyle—including *First Look Microsoft Office 2010* and *Microsoft Office 2010 Plain & Simple*.

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Part No. X17-13742

ISBN: 978-0-7356-2729-1



**U.S.A. \$49.99**  
Canada \$57.99  
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# Microsoft® Word 2010 Inside Out

Katherine Murray

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Printed and bound in the United States of America.

ISBN: 978-0-7356-2729-1

2 3 4 5 6 7 8 9 10 LSI 7 6 5 4 3 2

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# Acknowledgments

*Microsoft Word 2010 Inside Out* represents a kind of milestone for me. After a year of writing about various Microsoft Office 2010 programs and features (in a variety of formats), *Microsoft Word 2010 Inside Out* is the culmination of all we've learned and developed throughout the beta and launch of Word 2010. I think this version of Microsoft Word is the best yet. Echoing the maturation of the software, this book has also found a voice and purpose in sync with the times, offering readers many practical examples, plenty of how-to information, and a flexibility designed to help content creators prepare what they need for a variety of formats and distribution channels.

Growth and development never happens in a vacuum but requires a supportive environment—complete with wind, sunlight, and rain—to produce the best results. A huge thank you goes out to the following people for contributing to the tending and nurturing of this project:

- Juliana Aldous, who was responsible for acquiring this project when we started many months ago (and who has since moved into a new role at Microsoft Learning), a big thanks for catching the vision and being enthusiastic about the new ideas and approach I wanted to take in these pages;
- Claudette Moore, my agent at Moore Literary Agency, for her always-helpful suggestions, insights, and encouragement when there's a lot to do and not much time in which to do it! Thanks, Claudette; as always, you make these projects possible—and even fun.
- Kenyon Brown, senior editor, for overseeing this book, (our most recent in a whole series of Office 2010 projects) with his characteristic professional style and holistic management skills. Keeping everyone moving, in sync, and on schedule is no simple task, but Ken seems to do it naturally.
- Todd Meister, technical editor, for his careful and insightful review of all content in this book. Tech editing isn't easy when a book project spans the process of beta development and software release, and Todd not only makes the task look simple, but offers corrections and great suggestions in a supportive and collaborative way.
- Bob Russell at Octal Publishing, for a great copy edit, complete with fun and thoughtful comments and suggestions that helped make this a better book;
- Kristen Borg, Production Editor, for her careful and kind project management as the book moved through editing, review, and production;
- Sumita Mukherji, for her friendly and helpful scheduling and coordination of the project early-on; and
- Dianne Russell, also at Octal Publishing, for the beautiful, clean, and effective layout and design you now hold in your hands.



# Conventions and Features Used in This Book

This book uses special text and design conventions to make it easier for you to find the information you need.

## Text Conventions

Convention	Feature
Abbreviated menu commands	For your convenience, this book uses abbreviated menu commands. For example, “Choose Tools, Forms, Design A Form” means that you should click the Tools menu, point to Forms, and select the Design A Form command.
<b>Boldface type</b>	Boldface type is used to indicate text that you enter or type.
Initial Capital Letters	The first letters of the names of menus, dialog boxes, dialog box elements, and commands are capitalized. Example: The Save As dialog box.
<i>Italicized type</i>	Italicized type is used to indicate new terms.
Plus sign (+) in text	Keyboard shortcuts are indicated by a plus sign (+) separating two key names. For example, Shift+F9 means that you press the Shift and F9 keys at the same time.

## Design Conventions

### Note

Notes offer additional information related to the task being discussed.

Cross-references point you to other locations in the book that offer additional information on the topic being discussed.

### CAUTION!

Cautions identify potential problems that you should look out for when you're completing a task, or problems that you must address before you can complete a task.

## INSIDE OUT

This Statement Illustrates an Example of an “Inside Out” Problem Statement

These are the book’s signature tips. In these tips, you’ll get the straight scoop on what’s going on with the software—inside information on why a feature works the way it does. You’ll also find handy workarounds to different software problems.

## TROUBLESHOOTING

*This statement illustrates an example of a “Troubleshooting” problem statement.*

Look for these sidebars to find solutions to common problems you might encounter. Troubleshooting sidebars appear next to related information in the chapters. You can also use the Troubleshooting Topics index at the back of the book to look up problems by topic.

## Sidebar

**T**he sidebars sprinkled throughout these chapters provide ancillary information on the topic being discussed. Go to sidebars to learn more about the technology or a feature.

# Introduction

Maybe you've noticed: creating simple documents today is so 2009. In this new decade, the emphasis has shifted from designing, creating, editing, and printing real hold-in-your-hands documents to creating content that can be used in a variety of smart, efficient ways. You might create content about a new product, for example, and instead of simply printing a fact sheet that you hand to all your sales reps, you save one version as a PDF, send another in an e-mail message, post some of the content to a blog, include some of the description in a catalog, and forward the Word file to peers around the globe.

What's more, you'll rarely create these content pieces alone. The use of teams is growing throughout industries of all types, and with good reason. When you work collaboratively, each person on a team can contribute his or her expertise, without tying up anybody's time around the clock. Shared review enables many people with many perspectives to provide feedback so the content is the best that it can be. Team work, when it works well, can make a huge difference in the type and quality of materials you create. When team work *doesn't* work well, of course, it's another story. Luckily, Word 2010 includes some great new features that help you to reduce or dissolve collaboration challenges.

Another big change in the way we work has brought about changes in Word 2010. Today, thanks to the advent of the mobile phone and the wanderlust spirit of today's information enthusiast, we know it's possible—and we increasingly want—to work anywhere, anytime. You know those moments that seem wasted on the train out of the city? Now you can use them to finish reviewing a document you need to share with your team in the morning. You can access your Word files—and edit, format, review, and share in real time—from any point you have Web or smartphone access.

With these major changes in the way we work and where we work underway, Word 2010 is positioned to be a state-of-the-art word processing program that really is there for you. With the tools you need to produce any kind of content you want and the flexibility to enable you to create, edit, and share that content from almost any point on the globe, Word 2010 pops the lid on anything that was holding you and your creativity back before.

## Get Busy with Word 2010

With all that being said, the book you now hold in your hands is a major revamp from previous versions of *Microsoft Word Inside Out*. As Word users, our need for content creation has been kicked up a few notches, and this book responds accordingly. In the pages that follow, you'll find that the emphasis on creating all kinds of content, with anyone, from

anywhere, flows through the examples, features, and projects. We hope you'll find examples that speak to the way you use Word every day to accomplish the goals of your business, department, company, or school.

The various parts and chapters in this book help you to explore the whole Word 2010 landscape from a variety of entrance points. The parts focus generally on the types of overall tasks you are likely to want to complete, and individual chapters within each part zoom in on a specific tool or technique (or range of techniques) related to that task. Along the way, you'll find notes, Inside Out tips, and troubleshooting ideas, as well as some "green" ideas and sidebars offering additional information that can help boost your understand or application of Word 2010 concepts.

## Some Assumptions About You

The *Inside Out* series is designed for readers who have some experience with Word and are pretty comfortable finding their way around the program. You don't have to be a power user or Word developer by any means; you aren't necessarily a technology enthusiast (like your author) although you do like the idea of using programs in a way that is efficient and effective so you can accomplish what you want to accomplish without a lot of fuss and bother.

For this reason, *Microsoft Word 2010 Inside Out* touches only briefly on some of the basic topics that you'll find covered in more detail elsewhere. Although we want the coverage in a book this size to be as complete as possible (we want you to get what you paid for), we also focus in on techniques and topics that are likely to appeal to readers who have already mastered many of the basics in Word.

If you find that you'd like to brush up on Word 2010 basics in addition to taking on the topics you'll find covered fully in this book, you may want to check out any or all of the following books:

- *Microsoft Word 2010 Plain & Simple*, by yours truly (Microsoft Press, 2010)
- *Microsoft Word 2010 Step by Step*, by Joyce Cox and Joan Preppernau (Microsoft Press, 2010)

### Tip

Remember that although nothing replaces the book experience when you need to refer to a technique or look something up in a reference work, there are other learning opportunities available to you online. Visit Microsoft Learning for online learning courses related to Word 2010 and the other Office 2010 programs.

## About This Book

*Microsoft Word 2010 Inside Out* helps you learn to master Word 2010 in the way you're most likely to use the program, following a linear process that looks something like this:

- Create a new document
- Apply a template and make layout choices
- Choose your theme for color and style
- Add content
- Translate phrases and documents
- Edit your content and use reference tools
- Apply and customize Quick Styles
- Add tables, diagrams, art, and more
- Co-author and share your documents with your team, near and far
- Work almost anywhere with the Office Word Web App
- Use Word 2010 for special projects, like blogging, mailings, long documents, and more
- Tackle the high-end Word features, including macros and forms

Each chapter provides the detail you need to know in order to accomplish those various tasks successfully, and you'll find tips and cautions along the way to steer you away from trouble spots and help you optimize the time you spend creating content.

## How This Book Is Organized

*Microsoft Word 2010 Inside Out* gives you a comprehensive look at the various features you will use whether you create long or short projects for print or online uses. The chapters are organized according to the types of tasks you are likely to be performing. Here's the general roadmap for the book:

Part I, "Word 2010: Make an Immediate Impact," starts with the obvious: the way the world has changed in relation to technology and the way we work, and how that is reflected in the new features you'll find in Word 2010. After a tour of the new features, you explore Backstage view and find out about the best ways to create a new document, apply and tweak a template, set up a page, adjust a layout, and apply themes.

Part II, “Creating Global Content: From Research to Review,” focuses on the ways you pull together different elements to create your Word document, translate it for a global audience, and edit, proof, and use reference tools as you polish up your words. In this part, you also learn the ins and outs of Quick Styles and find out how to create them on your own. You use the new Navigation Pane to find just what you want when you want it, reorganize content with Outline view, and spend a little time with the streamlined print process.

Part III, “Make Your Point Visually,” shines a light on one of the big improvements in Word 2010. As it becomes easier to grab and insert photos in our documents and content pieces, the overall look of the files we create is improving. Today you can create a professional marketing piece in under an hour that used to take weeks (no kidding) at a commercial print shop. Not only are the cost and quality under your control, but the images you choose to portray and the styles and artistic effects that you select enable your content to rival that produced by expensive firms or elaborate marketing departments. Also in this part, you learn how to add screenshots to your content and reflow text around the art elements on your pages.

Part IV, “Word 2010 as a Team Effort—Anywhere, Always,” helps you tackle the challenge of creating content in a global workplace that likely needs that content to be produced in different ways for different audiences. The reality of localizing content is that programs need to include translation tools that are easy to use and extend—and Word 2010 has just those sorts of translation tools. With the new language features in Word 2010, you can choose from a variety of languages and set up multiple levels of control for translations, whether you want to translate entire documents, sections, or words and phrases on the fly.

Part V, “Word 2010 Interactive,” moves things to a new level as you consider the different ways you can share the content you create. Whether you are generating an enormous master document that combines subdocuments contributed by a number of team members; blogging for a global audience; or designing and completing mass mailings to your customer base, donor list, or parent population; you’ll find what you need to complete your projects in this part of the book. This part also includes more specialized high-end Word 2010 techniques related to designing and distributing documents that use content controls and automating tasks using macros.

## Getting Started

So as you can see, there’s a lot to cover no matter how you plan to produce and offer your Word 2010 content to the world. The great news is that Word 2010 is in sync with the times and can grow right along with you as you stretch your own capabilities to master the features you need. The next chapter gets you started on that path by introducing you to the new and improved features in Word 2010.



**PART 1**

# Word 2010: Make an Immediate Impact

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# Spotlight on Microsoft Word 2010

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For most of us, the phrase *word processing* doesn't bring to mind exciting images of movement, color, sound, and images. It doesn't promise a lot of fun and connection like the phrase *social networking* does. It doesn't hint at an unlimited world of information or draw you closer to what fascinates you like the phrase *web browsing* does.

But that's all changing with Microsoft Word 2010.

The newest version of Word offers new and improved features that make it easy for you to make your documents look better than ever. You can control the format, enhance your text, and apply artistic filters to images to make your documents really shine. You can easily translate content on the fly, access your documents from almost anywhere, blog and share content with social media sites, and share your content with colleagues in a number of different formats with just a few clicks of the mouse. And you can access your content in a variety of ways—from the server, your desktop PC, your smartphone, or any device with Web access.

This chapter encourages you to envision the types of projects you'd like to create with Word 2010 and spotlights the new and improved features that will help get you there. Along the way, you'll learn about the Word 2010 window, explore the Ribbon, and find out more about Word options, the Trust Center, and tweaking program features to your liking.

## Imagining Word 2010

So how will you use Word 2010? Maybe one of the following scenarios fits what you have in mind or reflects tasks you might want to try in the future:

- Create a four-color annual report with photos of your staff, services, and office.
- Design a new product brochure with high-quality typography.
- Download the latest version of a document from shared server space so that you can review, edit, and upload the content later.

- Draft a letter to your top-level donors.
- Post an entry to your blog.
- Edit a book chapter simultaneously with others on your team.
- Review and edit your document while you're on the road.

The content you create today is likely to be much different from the ho-hum documents you drafted, printed, and photocopied a dozen years ago. Thanks to the advent of Web and mobile technologies, change is happening at an ever-increasing rate, and it's touching the way we create, edit, and share our information—printed and otherwise. Yesterday you were working on documents, one at a time, using revision marks and then waiting for your documents to come back from review. To move a file from one computer to another, you either e-mailed it or saved it to a disk or USB drive.

As today's Word user, you are probably not tied to a single computer as you create, edit, review, and share the content you create. You might use one computer at home and another at work; perhaps you check e-mail on your smartphone and log in to the office server from remote places that offer Web access. No longer are you working on one document at a time and then sending it to another member of your team for review—now your group might be viewing, editing, discussing, and commenting on the document in real time. And nobody is stuck at a stand-alone or networked PC any longer; now editing on your smartphone is a real option, as is logging in to your files using the Word Web App.

The idea is to give you a consistent user experience with Word 2010 no matter which device you might be using. Whether you open and work with files on the Web, review content on your smartphone, or edit documents on your PC, you'll be able to access and leverage the content you create in an almost unlimited number of ways.

## What's New in Word 2010?

Word 2010 is an exciting new release because not only have software developers been listening to the requests and feedback of users like you all over the globe, but they have also taken into account the way the work world is changing. With Word 2010, you can take advantage of features that enable you to share files in real time, work seamlessly with your corporate server, edit content simultaneously, and dramatically improve the pictures and the look of your text.

The changes in Word 2010 offer new and improved features in three key areas:

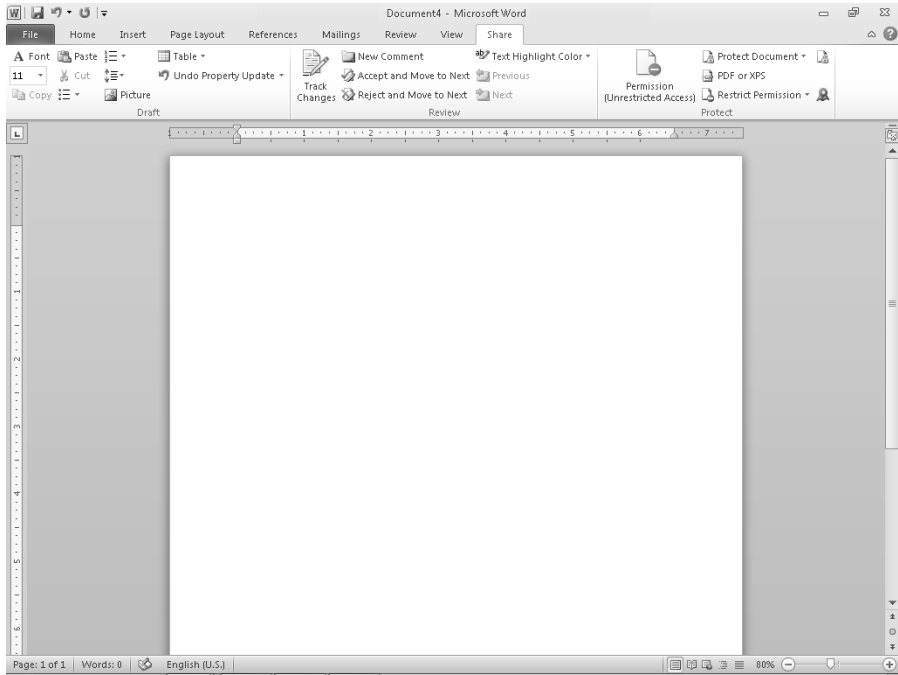
- **Creating a better user experience.** The Ribbon—which was introduced with Word 2007—can now be fully customized, which means that you can create your own tabs and tab groups. And now Backstage view brings together all the tools you need to set program preferences, work with files, and protect and share your content. Other user experience enhancements include the Navigation pane, which enhances the power of your search capabilities, and Paste with Live Preview, which enables you to preview various paste options before you add content to your document.
- **Improvements in authoring.** Co-authoring, also known as simultaneous editing, is the big story in authoring features for Word 2010, but you'll also find great new image features and text effects that help your content really stand out. What's more, now you can use high-end typographic features through the OpenType fonts that support them, including ligatures, kerning, stylistic sets, and more.
- **Word power in new contexts.** The idea of taking Word beyond the desktop becomes reality in Word 2010. Now you can move from desktop to Web to smart-phone to server—and back again—using any of the various access choices for Word 2010. You can also run Word 2010 on 64-bit systems to take advantage of the full processing power your computer possesses.

The sections that follow give you a quick introduction to each of these features in more detail.

## Enhancing Your User Experience

Word 2010 is all about flexibility—putting more power in your hands and giving you the tools to tailor the program to work the way you do. These are some of the top enhancements that will make your user experience a more pleasant one in Word 2010:

- **Customizable Ribbon.** You can easily add your own tabs and tab groups to the Ribbon in Word 2010. Suppose that you regularly create reports introducing the new products your company introduces. You can add tab groups that give you easy access to the tools you use for preparing, formatting, and reviewing the documents you are charged with producing (see Figure 1-1).



**Figure 1-1** You can easily customize the Word 2010 Ribbon to add tabs and tab groups (as demonstrated on the Share tab in this image) that fit the way you use the program.

For specific steps on tailoring the Ribbon to include the tools and tabs you want, see Chapter 2, “Managing Your Documents with Backstage View..”

- **Navigation pane.** The Navigation pane combines the best of the Find tool with Outline view and thumbnail displays, giving you three different ways to navigate the content in your document. You can search by heading, by thumbnail, or by text phrase. Additionally, you can use Word’s Find and Replace tools from the Navigation pane and browse through the objects in your document as well.
- **Paste with Live Preview.** Word users copy, cut, and paste information all the time. In fact, Word users undo paste operations more than any other—at least in part because in previous versions of the program, you didn’t always get the results you expected when you pasted information. Whether you are copying and pasting text, pictures, objects, headings, lines, charts, diagrams, or shapes, you need to make choices about the way in which you want the information pasted into your document. The new Paste with Live Preview makes it possible for you to preview the way the information will look before you click to paste it in your document. This builds more flexibility into a very common task, saving you time and trouble by enabling you to paste the information the way you want it—the first time.

- **Backstage view.** In Backstage view you have access to all the tools you'll use to create, save, open, share, protect, and print the files you create. Backstage view simplifies many of the most common file management tasks and gives you access to program information, Word Options, and Help choices (see Figure 1-2).

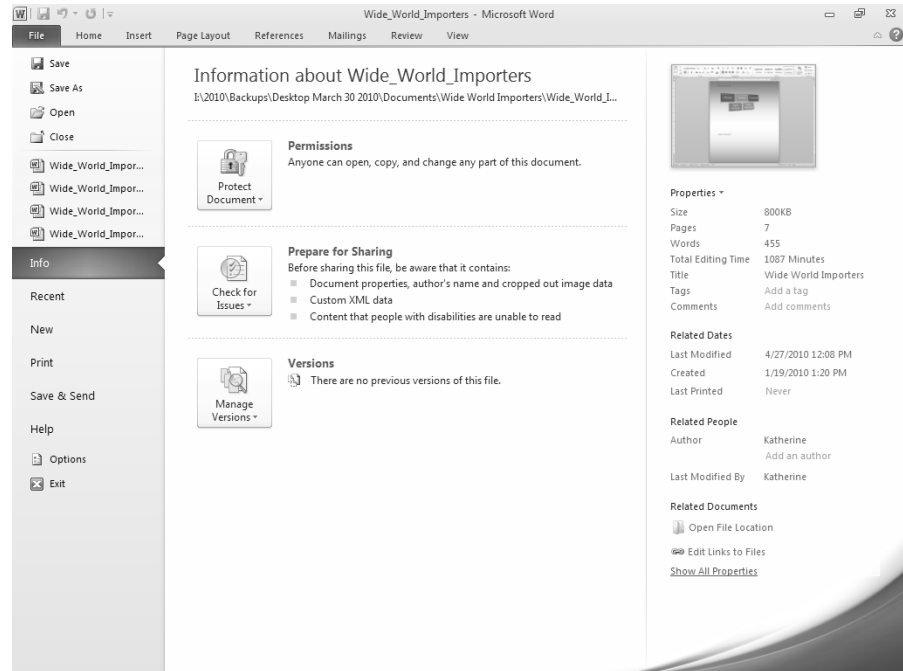


Figure 1-2 Backstage view pulls together all the tools you need to work with files and program preferences.

## Better Authoring Features

Many different features in Word 2010 are designed to improve your authoring experience so that you can create content that accomplishes the goal you're reaching for. Some of the top authoring features include:

- **Co-authoring in real time.** Word 2010 lets more than one person work in a file at the same time. You can communicate with other authors as you work and easily see where changes are being made in the document (see Figure 1-3). What's more, the co-authoring feature helps you resolve any editing conflicts that might arise (for example, perhaps you and a co-author have edited the same paragraph in different ways and Word can help you resolve the issue).

Chapter 22, “Collaborating and Co-Authoring in Real Time,” shows you the ins and outs of co-authoring and walks you through the process of resolving authoring conflicts in your files.

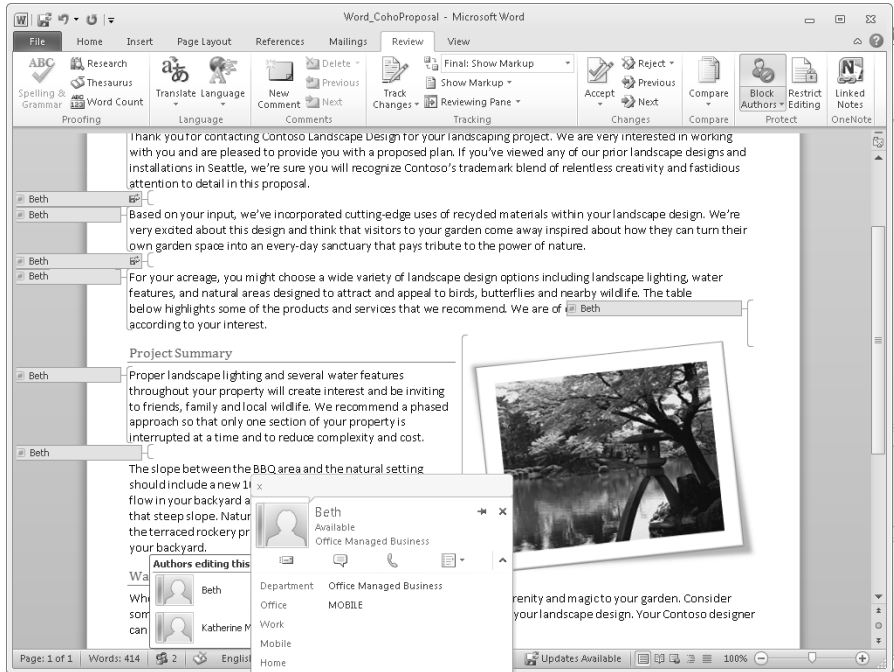


Figure 1-3 When you use Word 2010's co-authoring feature, you can see when and where others are making changes in a shared file.

- **Better translation tools help you talk to the world.** With Word 2010, you can choose the language you want to use for a number of translation and on-screen features. You can customize help text and program prompts, or translate text, sections, or entire documents on the fly using the Mini Translator (see Figure 1-4), the Research task pane, or whole-document translation services.

You learn how to set up the language you want to use and choose your translation preferences in Chapter 9, “Translating Text and Working with Languages.”





**Figure 1-4** The Mini Translator pops up over your Word window and enables you to copy, look up, or listen to the translation.

- **Check what you mean—as well as what you say.** The new contextual spelling checker helps you check your document for errors in usage as well as spelling. Did you say “there” when you meant to say “their”? Or did you use “loose” instead of “lose”? The new contextual spelling checker points out these and other errors so that you can make sure your document is as grammatically accurate as possible.
- **Improve pictures with artistic effects and enhanced editing.** Word 2010 now includes specialized filters that you can apply to the images you place in your documents. Instead of including a regular photo of a new product, for example (although you might want to include that elsewhere in your document), you can stylize the image by applying one of any number of cool effects, such as glass, pencil sketch, plastic wrap, and more (see Figure 1-5). You can also control the balance, saturation, contrast, and more in your photos by using the expanded editing capabilities—you can even remove the picture background, which you’ll learn more about in Chapter 17, “Adding and Editing Pictures and Screenshots.”



**Figure 1-5** With Artistic Effects, you can apply high-end graphics filters to images in your documents.

### Tip

Word 2010 also includes enhancements to SmartArt. Find out about SmartArt's new features in Chapter 16, "Create Compelling SmartArt Diagrams and Charts."

- **Show others your screen.** If you create training materials or want to share a picture of what you see on-screen, you'll enjoy the new Insert Screenshot feature in Word 2010. As part of the Illustrations group, you can either grab a portion of the screen or insert an entire screen image in your current document. You'll find out more about adding screenshots in Chapter 17.
- **Enhance text with text effects and support for OpenType features.** New text features in Word 2010 enable you to apply new effects to the content and headings in your document, such as glows, reflections, 3-D effects, and much more. You can

also take advantage of high-end typography features available with some OpenType fonts, including ligatures, stylistic sets, and number styles to extend the look you want to create.

Chapter 7, “Creating and Reusing Content,” introduces you to the ways that you can use text effects to spruce up the look of your text and increase your font choices with OpenType support.

### Tip

**Expanded inking capabilities.** Word 2010 now includes improved support for ink users via an expanded pen palette, enhanced touch sensitivity, and the ability to incorporate and convert inked content to digitized text and equations. Turn to Chapter 7 for more information on using ink capabilities in Word 2010.

## Use Word 2010 Anywhere

When was the last time you sat at your desk all day long and worked on one continuous document? We thought so. Word 2010 takes into account the needs of today's user, who is often on the go, juggling multiple projects, and working seamlessly with others down the hall or around the world. New features that help you take Word 2010 beyond your desktop PC include:

- **The Word Web App.** Now you can access your Word 2010 files and review, edit, update, format, and share them normally from any point where you have Web access. Using your SharePoint Workspace or Windows Live SkyDrive account, you can access your saved files and work with them in a Web version of the Word 2010 interface you're accustomed to (see Figure 1-6). This means you don't need to carry a flash drive or e-mail documents to yourself in order to access them in different places.
- **Seamless saving to the server.** Working with others means that you might be regularly saving the files you create in a shared server space or posting your documents to Windows Live SkyDrive so that others can access them. You can save your files to your shared space as easily as you save a document on your hard drive in the office. Another detail, simplified.



**Figure 1-6** The Word Web App makes it easy for you to work on your files from any point you have Web access.

- Using Word Mobile 2010.** In addition to having the flexibility to work on your Word files from the Web or saving to your server, you can also access and work with your files from your smartphone. Using a streamlined Microsoft Office 2010 interface designed for the small screen, you can view, edit, format, update, and share your documents easily from your phone.

### Note

Office Mobile 2010 is not part of the Office 2010 suites and must be purchased separately.

# Finding Your Way Around the Word 2010 Window

It turns out that we're still dealing with the aftermath of the Office 2007 user interface redesign. People had greatly divergent views on the overall approach that the designers of Office 2007 were reaching for—and many people just plain didn't like the Ribbon. Early reactions were generally positive—people were intrigued by the idea that Office designers went “back to the drawing board” when they began brainstorming about the new look and feel of the user interface. Experienced users were wary—why fix what's not broken?—and power users wondered whether the simplified design would make it impossible to use the shortcuts, macros, and more they had come to rely on to expedite their document tasks.

Word 2010 (along with all the other Office 2010 applications) carries forward the purpose and intent of the new user interface, this time offering increased flexibility—now you can customize the Ribbon to suit your needs. Shortcut keys still work, macros are easier to create than ever, and we realize—as the software continues to move forward—that we haven't lost any of the familiar tools that we were worried about misplacing in the new design.

## Get What You Need, Intuitively

But, you know, everybody's different. One of the lessons I think Word 2007 taught was that not everybody was in agreement that “new = better.” The intention to create an interface that was easier to use and ultimately uncluttered the workspace was a good one. And the design philosophy behind the Ribbon—bringing you just the tools you need when you need them, organized around specific tasks you want to complete—was also sound. But learning a dramatically new interface and getting comfortable finding your favorite tools and options when you need to get things done can be a bit of a headache—one many Word users suffered through on the way to a more intuitive word processing experience.

When you open Word 2010 for the first time, the screen that meets your eye is open and inviting. Figure 1-7 shows the Word 2010 window. The Ribbon appears at the top of the screen, with tabs that group the tools you need for the various tasks you'll undertake in Word.

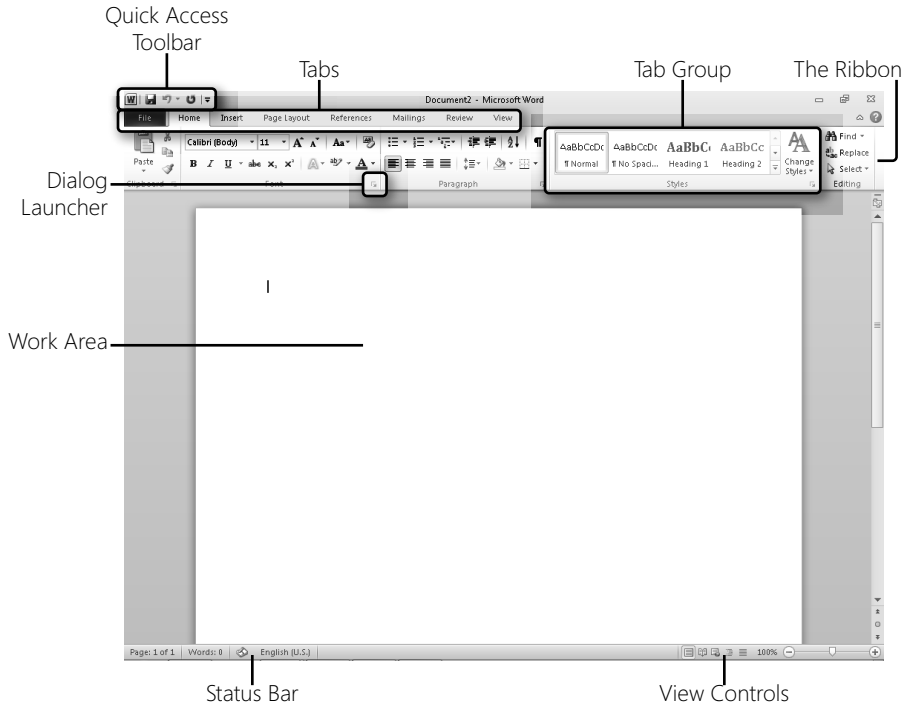


Figure 1-7 The Word 2010 window.

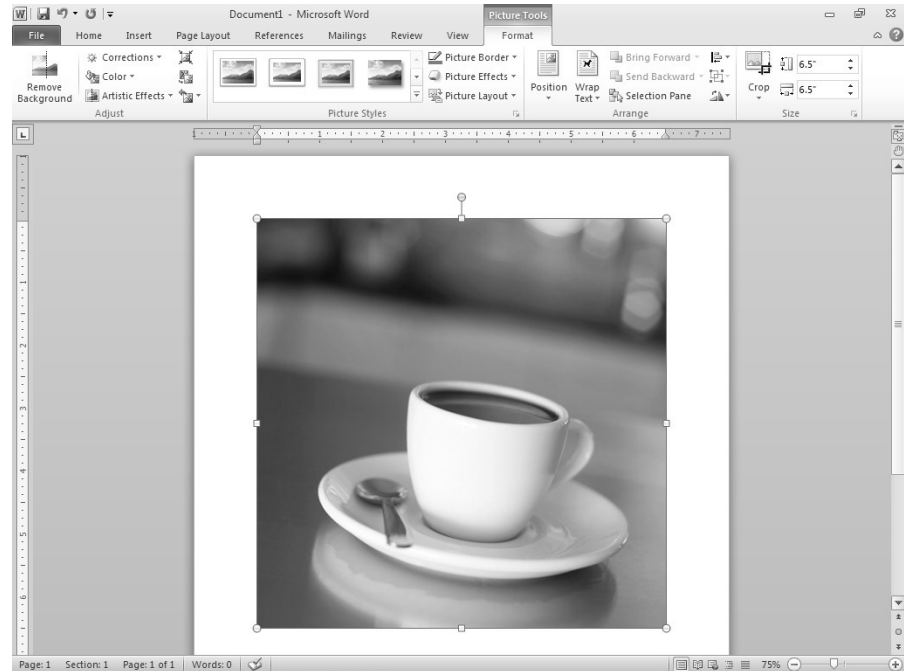
## Exploring the Ribbon

The Ribbon across the top of the window organizes the tools in tabs, which reflect the different tasks you are likely to want to accomplish with the program. For example, when you create the document, the Home tab provides the commands you are likely to use as you start out. When you want to add pictures, shapes, diagrams, and more, you find the tools you need on the Insert tab. When you're ready to share your document with others, the Review tab offers a variety of tools for preparing the file for review and working with the review copies when you receive them.

The Ribbon, as it appears by default, includes all the following elements:

- **Tabs (Home, Insert, Page Layout, References, Mailings, Review, and View).** Tabs stretch across the screen just below the window's title bar. You can also customize the Ribbon by adding tabs and tab groups that provide tools you use most often.
- **Groups.** These are collections of tools available on the Ribbon when a specific tab is selected. For example, on the Insert tab, the groups displayed include Pages, Tables, Illustrations, Links, Header & Footer, Text, and Symbols.

- **Contextual tabs.** Contextual tabs help keep the window uncluttered by displaying task-related tools only when an object is selected in the document. When you select a picture, for example, the contextual Picture Tools tab appears along the top of the Ribbon. The commands displayed when the tab is selected all relate to the object you've selected (see Figure 1-8).



**Figure 1-8** Contextual tabs display tools related to the specific object you select in the document.

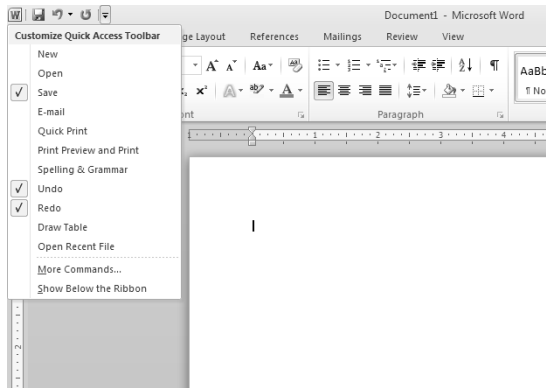
### Note

The Ribbon is fully displayed by default when you begin working with Word. If you want to minimize the Ribbon to increase room on the screen, press **Ctrl+F1** or click the **Minimize The Ribbon** button, located to the left of the **Help** tool just above and at the right end of the Ribbon. The Ribbon reduces to the tabs only. To redisplay the Ribbon, press **Ctrl+F1** again or click **Expand The Ribbon**. A quick way to reduce and alternately display the tabs is to double-click one of the tabs. The first double-click hides the Ribbon; the second redisplay it.

You can tailor the Word 2010 interface to fit your own style. Now you can add tab groups, create new groups, reorder tools, and rename groups already displayed. You'll find everything you need to make these changes in Word Options. See Chapter 2 to find out the specifics.

## Keep Your Favorite Tools in Reach with the Quick Access Toolbar

In the upper-left corner of the screen you'll find the Quick Access Toolbar, which offers, within clicking distance, favorite file-management tools you are likely to use often. When you first launch Word 2010, the Save, Undo Typing, and Repeat Typing tools appear in the Quick Access Toolbar. You can click the Customize The Quick Access Toolbar arrow to display a list of additional tools and options that you can use to tailor the tools offered there (see Figure 1-9).



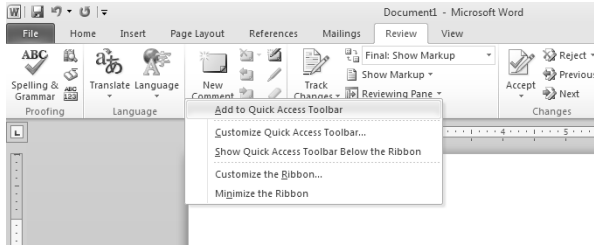
**Figure 1-9** You can tailor the Quick Access Toolbar to include the tools you use often and want to make available while you work.

You can customize the Quick Access Toolbar a couple of different ways. First, you can simply click the tool you want from the Customize Quick Access Toolbar list. If the tool doesn't appear in the list, you can click More Commands, navigate to the tool you want to add, and click it. You can also add a tool to the Quick Access Toolbar by right-clicking the tool in the Ribbon, and then click Add To Quick Access Toolbar (see Figure 1-10).

### Tip

The changes you make to the Quick Access Toolbar in one document carry through for other documents as well. To return the Quick Access Toolbar to the default display, click the Customize Quick Access Toolbar and choose More Commands. In the Customizations area, click the Reset arrow and choose Reset Only Quick Access Toolbar, and then click OK.





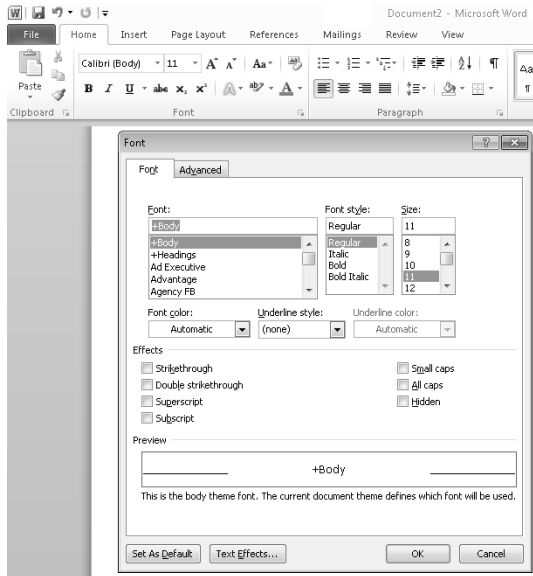
**Figure 1-10** Add favorite tools to the Quick Access Toolbar easily.

### Note

If you add a number of tools to the Quick Access Toolbar, you might want to give it more room by displaying the toolbar in its own row below the Ribbon. To do so, Right-click anywhere on the Ribbon and choose Show Quick Access Toolbar Below The Ribbon. To return the display of the toolbar to its original state, right-click the Quick Access Toolbar and choose Show Quick Access Toolbar Above The Ribbon.

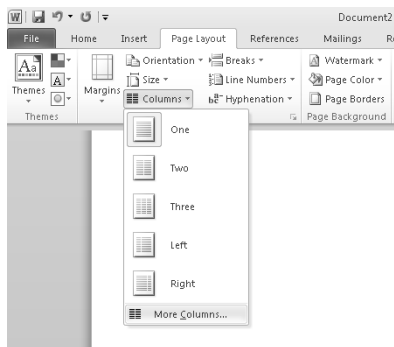
## Using Dialog Launchers

The Ribbon is great for providing you with groups of tools that are related to the task you're trying to accomplish, but sometimes it's helpful to see all the options you have available so you can make the best choice. In those situations, having a traditional-style dialog box comes in handy. Dialog boxes are available for some groups on the Ribbon. Those groups that do have a dialog box display a small, boxed arrow symbol, called a *dialog launcher*, in the lower-right corner of the group. For example, the Font group on the Home tab has a dialog launcher in the lower-right corner. When you click the launcher, the dialog box appears (Figure 1-11).



**Figure 1-11** Dialog launchers display dialog boxes.

Options for displaying dialog boxes are also available at the bottom of any gallery that offers additional options. For example, when you click Columns in the Page Setup group on the Page Layout tab, a gallery of column settings appears. Click the More Columns option (see Figure 1-12) at the bottom of the gallery to launch the Columns dialog box.

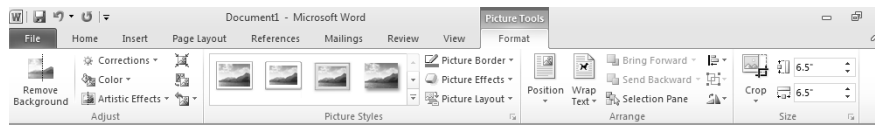


**Figure 1-12** Click the More Columns command at the bottom of the gallery to display additional options.

## Working with Galleries

Word 2010 includes all sorts of galleries—themes, styles, picture styles, and more—that graphically display the range of choices from which you can click the design, color, layout, and style you want. You will see galleries displayed in different ways, depending on your screen resolution and the size of the Word window. The Ribbon was designed to adjust to the size of the screen, so in some cases you might see galleries appear as selections on the Ribbon, while other galleries appear as drop-down items.

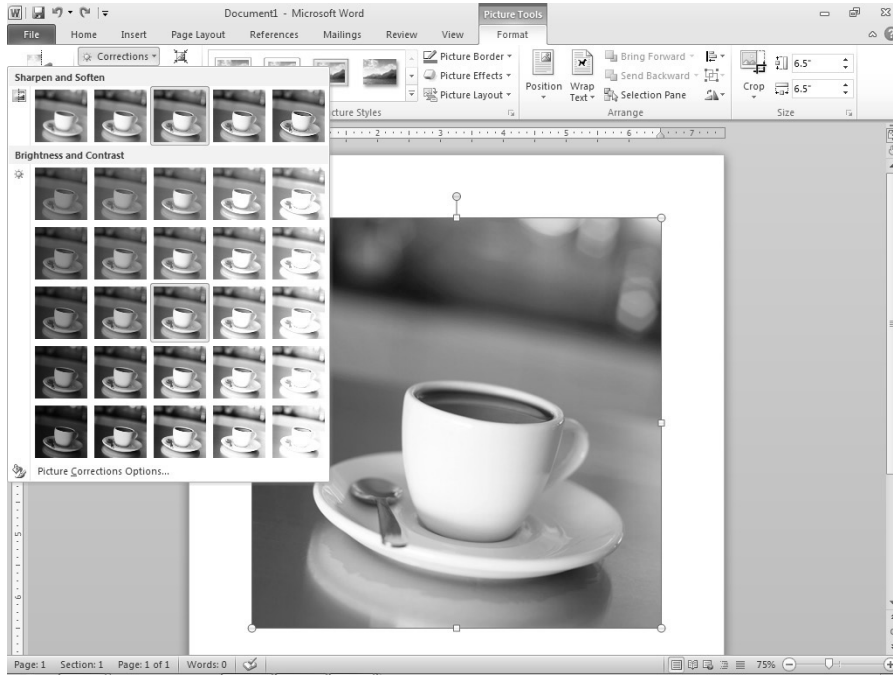
Basically you'll see galleries presented in one of three ways in Word. Some galleries are shown as part of a group on the Ribbon (similar to the Picture Styles gallery shown in Figure 1-13); you can click the More button in the lower-right corner of the gallery to display the full collection of choices. Other galleries (such as those available for Themes, Margins, and Position commands) display as drop-down galleries from which you can make your selection.



**Figure 1-13** Some galleries display choices in the Ribbon.

Other galleries open as a palette of choices, like the Corrections gallery shown in Figure 1-14. Using galleries, you can easily see at a glance which color combination, format, color scheme, transition, or chart type you want. The choices you see in the galleries are connected with the theme you've selected (if any) for your document. This helps you be sure that when you're choosing a chart type, for example, it reflects the colors, fonts, and effects used in other parts of your document.

To choose an option in a gallery, simply click your choice, and the setting is applied to the current document or selected object.



**Figure 1-14** Some galleries open as palettes from which you can easily click your choice.

### Tip

You can easily preview how the new selection will look by hovering your mouse over the option you're thinking about selecting. The effect of the choice will show in the selected object or text in your document. In this way, you can try out different choices before you commit to one by clicking it.

## Making Quick Formatting Changes with the Mini Toolbar

If you're like other Word users, many of the choices you make while you're working on a document have to do with formatting. Word 2010 includes the Mini Toolbar to bring the most common formatting options to you so you don't have to leave your creative zone to choose the options you want to apply. Whenever you select text, the Mini Toolbar appears above the selection (see Figure 1-15). If you want to use the Mini Toolbar, move the mouse toward it and select the option you want; otherwise, move the mouse pointer away from the toolbar and it will fade away.

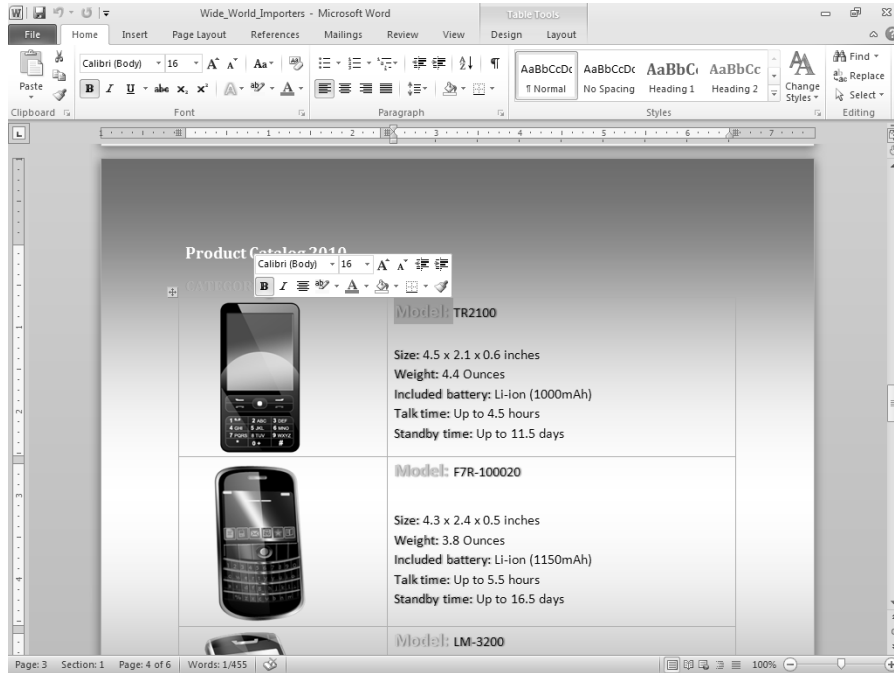


Figure 1-15 The Mini Toolbar displays quick formatting choices whenever you select text.

### Note

If you find the Mini Toolbar distracting or don't think you'll use it, you can simply turn the feature off. On the File tab, choose Options; in the General tab of the Word Options dialog box, clear the Show Mini Toolbar On Selection check box, and then click OK. Now the Mini Toolbar is disabled and will not appear the next time you select text. (It will appear, however, when you right-click selected text.) To reactivate the Mini Toolbar, display the Word Options dialog box again and reselect the check box.

## Getting a New View of Your Document

While you're working on your document, you can easily change to a different view by clicking one of the view tools in the bottom-right corner of the Word window or by choosing a view in the Document Views group on the View tab. You can also use the new Zoom slider (in the lower-right corner of the Word window) to enlarge or reduce the display of the

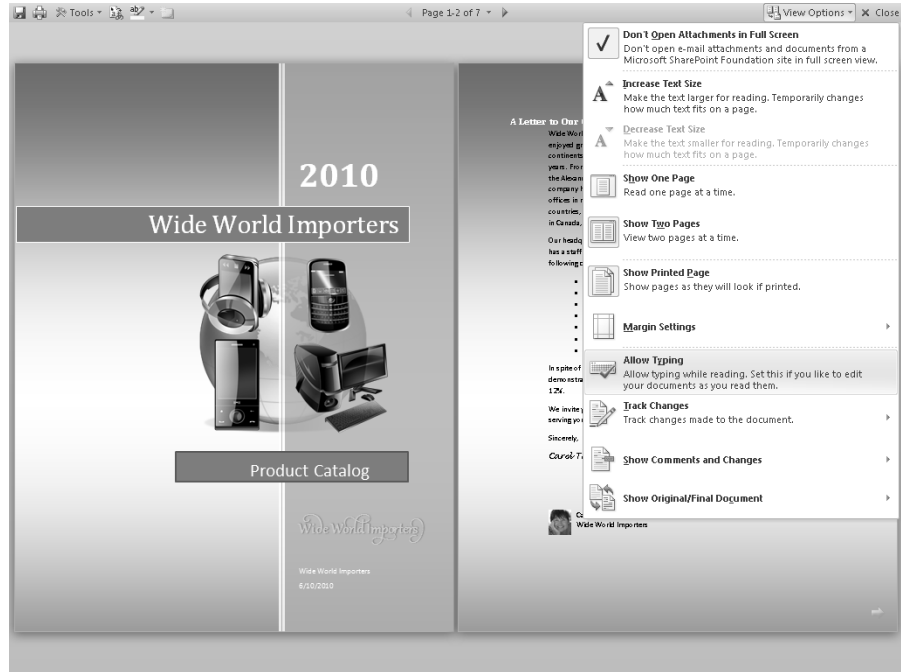
document. Word offers you many different ways to view your work, depending on the type of document you're creating and the task at hand:

- **Print Layout** This view, which is used by default when you create a new document, seems to be the view most people use as they create and edit their documents. It shows how the document will look when printed. In this view, you can see headers and footers as well as footnotes and endnotes. The edges of the page and the space between pages are also visible as you type and edit.

### Tip

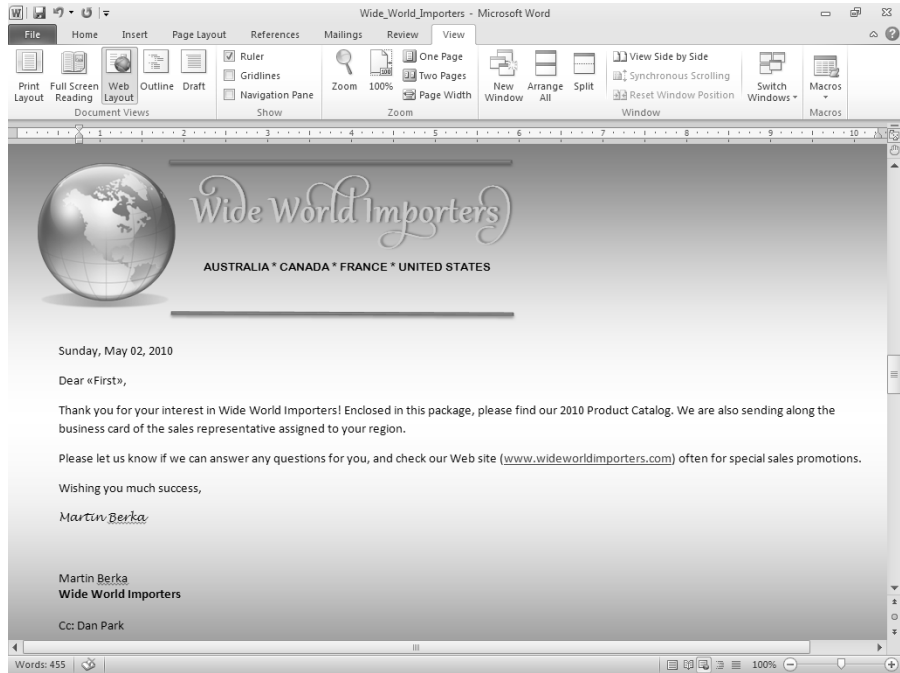
You can alternately suppress and display the top and bottom margins of your document in Page Layout view by double-clicking the space between the pages. By default, Page Layout view shows a gap between pages. If you position the pointer over the page break, the pointer changes to two arrows and a tooltip prompts you to double-click the space to remove it. Double-clicking at that point removes the space between the pages and enables you to view text before and after the break in a continuous paragraph. To return the page display to the default setting, position the pointer over the page break line and double-click.

- **Full Screen Reading** This view gives you the maximum amount of space on the screen, giving you more room to review and comment on the content. Note, however, that Full Screen Reading view does not display the document as it will look in print—that's the job of Page Layout view. By default, when you first begin using Full Screen Reading view, the functionality is limited to only reviewing and commenting. If you want to be able to type and edit in Full Screen Reading view, click View Options in the upper-right corner of Full Screen Reading view and choose Allow Typing.



**Figure 1-16** Using Full Screen Reading view, you can view, comment on, and edit your document with a maximum amount of room on the screen.

- Web Layout** This view displays the page as though it were a Web page. The first thing you will notice when you select the Web Layout view tool is that the page margins are not used, and depending on the content of your document, the format of your document might seem skewed (see Figure 1-17).



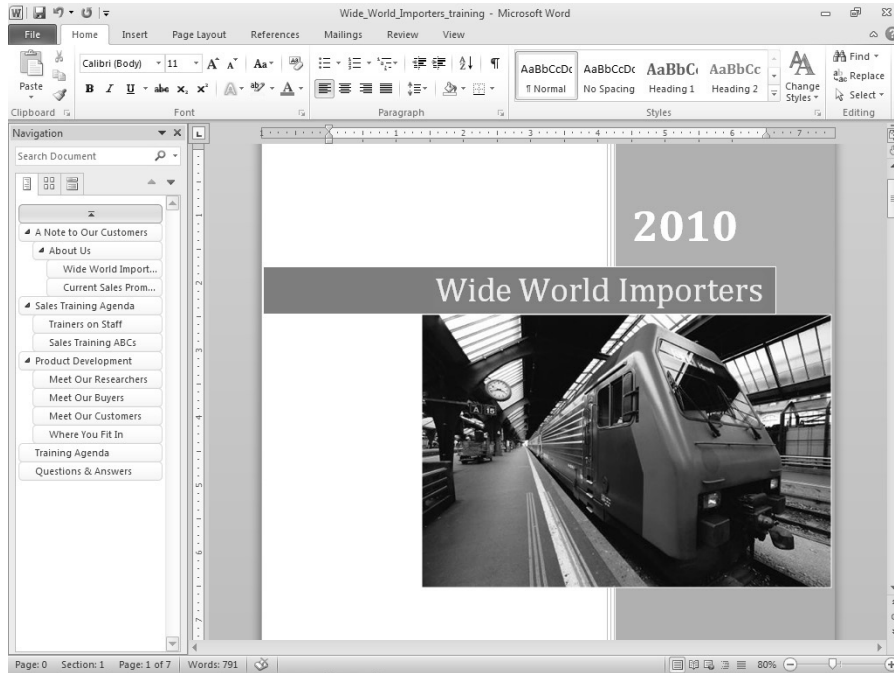
**Figure 1-17** Web Layout view shows you what your document will look like as a Web page.

- **Outline** With this view, you can see the document in outline form, with headings and subordinate text indented so that you can easily identify and work with sections in a long document.
- **Draft** This view is a fast, no-frills mode that many people prefer to use when they need to write or edit something quickly. Note that some elements—such as headers and footers—are not visible while you’re working in Draft view.

## Finding What You Need Quickly with the Navigation Pane

An exciting new feature in Word 2010 combines the Document Map and Thumbnail features with a powerful search tool to help you to find content you need quickly using whatever method works best for you. On the View tab, select the Navigation Pane checkbox in the Show group; the Navigation pane appears on the left side of your Word 2010 window (see Figure 1-18).

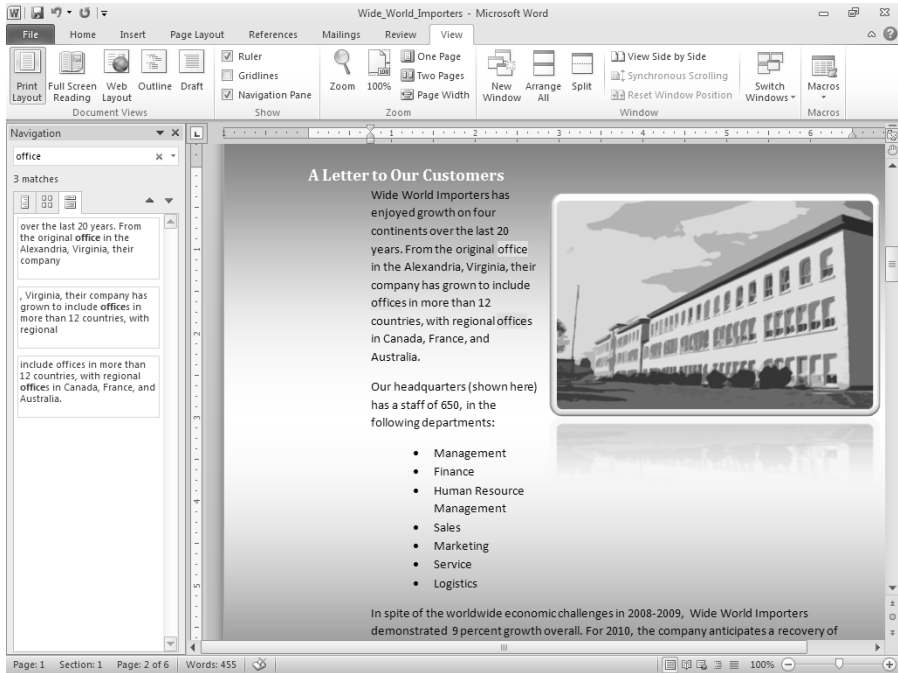




**Figure 1-18** The Navigation pane enables you to view, move through, and search your document by heading, page view, or text search.

The Navigation pane offers three different tabs that move you through the information in your document by one of these methods:

- **Browse the headings in your document.** When you click this tab (shown in Figure 1-18), Word 2010 displays a list of headings in your document. Clicking on any of these heading will bring you directly to the point in the file where the heading appears.
- **Browse the pages in your document.** This tab displays thumbnail images of the pages in your document. Again, you can move to a specific page by clicking on an image in this view.
- **Browse the results from your current search.** This tab shows the results of a search performed using a word or text phrase you enter in the Search Document box. The results are listed and highlighted, as shown in Figure 1-19. Move to the result in the file by clicking the result you want to see.



**Figure 1-19** You can search for text in your document, and the Navigation pane shows you every place the word or phrase appears.

### Tip

You can also search for specific objects in your document using the Browse Object features. For more about searching and navigating your document, see Chapter 8, “Navigating Your Document.”

## Displaying Rulers and Gridlines

When you are working on a document in which the alignment and sizing of elements is important, you will want to turn on rulers and gridlines to ensure that items line up on the page and meet the measurements you need. The controls for both items are found in the Show/Hide group on the View tab.

You can display and hide rulers quickly using a tool located at the top of the vertical scroll-bar. The rulers are displayed by default, so to hide the them, click the View Ruler button. To redisplay the rulers, click the tool a second time.

Alternatively, you can display vertical and horizontal rulers by selecting the Ruler check box on the View tab. To hide the rulers, clear the Ruler check box.

Adding gridlines is a similar process. On the View tab, select the Gridlines check box. Gridlines appear on your document to which you can easily align pictures, quotes, or other elements on your page (see Figure 1-20).

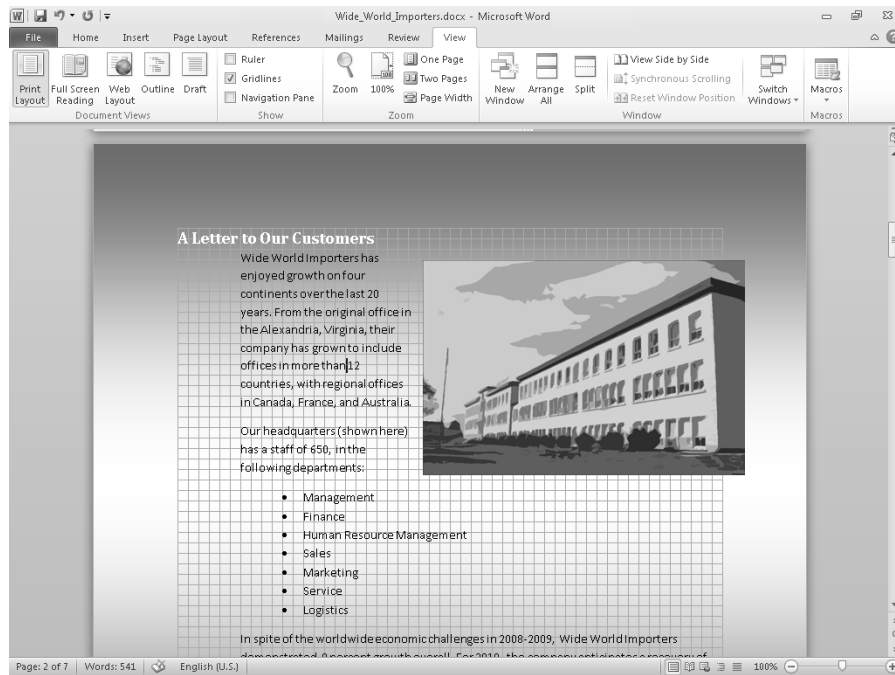


Figure 1-20 Gridlines help you to align pictures, charts, and other elements in your document.

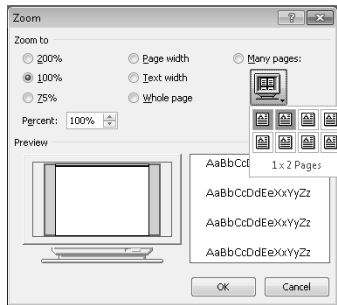
### Note

If you don't like rulers cluttering up your work area and you want to remove the vertical ruler in Print Layout view, you can turn it off using Word Options. On the File tab, choose Options, and then choose Advanced and scroll down to the Display options. Clear the check box for Show Vertical Ruler In Page Layout View. Click OK to save your changes. When you return to Print Layout view, the vertical ruler will be gone.

## Viewing More Than One Page at a Time

The Zoom group on the View tab includes five different tools with which you can change the size and number of pages you view on the screen at any one time. Page Width view is selected by default, but you can easily change the view to match your own comfort level.

To change the size of the text, click the Zoom tool to open the Zoom dialog box. You can choose one of the preset sizes or specify your own by clicking in the Percent box and typing a new value (see Figure 1-21). You can also change the number of pages displayed by choosing the Many Pages option and then dragging to select the number of pages you want to display on the screen. The Preview window shows you how your document will look, and the sample text area shows how readable (or not!) your text will be. When you've made changes you are happy with, click OK to save them.



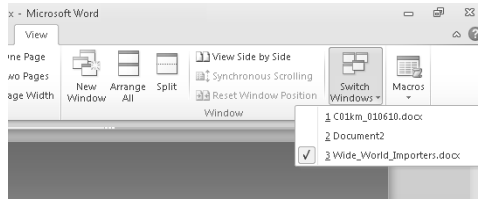
**Figure 1-21** Use the Zoom dialog box to change the way your document is displayed.

In addition to changing the page display in the Zoom dialog box, you can also easily switch among multipage views by clicking the One Page, Two Pages, or Page Width tools in the Zoom group on the View tab. Each of these tools behaves the way you would expect—One Page shows you the whole page at the cursor position; Two Pages displays the page on which the cursor is active and the next full page in the document; and Page Width magnifies or reduces the size of the document so that it fits the width of the Word window.

## Working with Multiple Documents

When you are working on a big project, chances are that you will have more than one document open at the same time. If you're copying and pasting your research notes into a new journal article you're writing, or if you're incorporating the latest fundraising figures into the annual report, you'll need an easy way of moving among open documents while you work. The View tab includes the Window group which gives you the means to do just that.

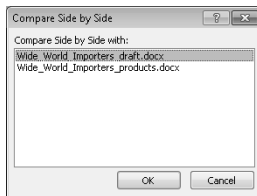
When you want to easily move among open Word documents, use the Switch Windows tool. When you click Switch Windows, a list appears that shows you the various open windows (see Figure 1-22); just click the one you want to see.



**Figure 1-22** Click Switch Windows and choose the document you want to view to move among open files.

Use the New Windows tool when you want to open a new copy of the current document in a new window. You might use this tool when you need to edit or compare different portions of a large document instead of endlessly scrolling back and forth. When you're ready to close the copy, click the close button in the upper-right corner of the screen.

The Arrange All, Split, and View Side By Side commands all enable you to choose how you want to view the open documents. If you have more than two documents open at once, clicking View Side By Side displays the Compare Side By Side dialog box, as shown in the following image. Here, you can choose the other open document you want to compare with the current one. Select your choice and click OK to display the document.



## Note

Depending on the number of open document windows and your screen resolution, when you use the Arrange All command, the Ribbon might disappear. This happens due to the auto scale feature of the Ribbon. To return to the full view of the Ribbon, simply resize the height of the document window.

When you use the View Side By Side command, Word sets the default to Synchronous Scrolling, which means that as you scroll through one document, the other document scrolls automatically as well. This is helpful for comparing documents in which you're looking for paragraphs, sections, or even phrases that might be slightly different.

## Understanding and Tailoring the Status Bar

The status bar, which is located in the lower-left corner of the Word 2010 window, provides useful information about your current document. By default, the status bar shows you:

- The location of the cursor position
- The number of pages in the document
- The number of words
- Whether any proofing errors exist
- The selected language you are using if you have installed more than one language keyboard preference

### Note

You might also see in the status bar an indicator that lets you know whether any macros are currently being recorded in your document.

Page: 2 of 7 | Words: 451 |  English (U.S.)

The status bar includes four key elements:

- The Page area shows the number of the current page and the length of your document. You can also click this area to display the Go To tab in the Find and Replace dialog box.
- Word displays a continually updating word count on the status bar as well. If you select text, Word shows you how many words of the total word count are selected (for example, 50/451). Click this area to display the Word Count dialog box, in which you can view additional statistics on number of characters, paragraphs, and more.
- To detect errors, an ongoing spelling and grammar checker continuously reviews your document content. Click this icon to go to the error and see options for correcting it.

- If you have installed more than one language and keyboard preference for your version of Word 2010, the language you have selected as the default appears in the status bar to the right of the proofing indicator. Click this option to display the Language dialog box and choose the language used for the spelling and grammar checker.

In addition to the controls that show in the status bar by default, you can add or remove options by right-clicking anywhere on the bar. The Customize Status Bar list appears, presenting statistics about your document and showing you which features are currently enabled (see Figure 1-23). Additionally, the Customize Status Bar list provides the status of various elements that show you the status of the file; for example, in Figure 1-23, you can see that there is no macro currently being recorded and that Permissions and Track Changes are both turned off for the current file.

Customize Status Bar	
<input type="checkbox"/>	Formatted Page Number 1
<input type="checkbox"/>	Section 1
<input checked="" type="checkbox"/>	Page Number 2 of 7
<input type="checkbox"/>	Vertical Page Position 1.2"
<input type="checkbox"/>	Line Number 2
<input type="checkbox"/>	Column 4
<input checked="" type="checkbox"/>	Word Count 451
<input checked="" type="checkbox"/>	Number of Authors Editing
<input checked="" type="checkbox"/>	Spelling and Grammar Check No Errors
<input checked="" type="checkbox"/>	Language English (U.S.)
<input checked="" type="checkbox"/>	Signatures Off
<input checked="" type="checkbox"/>	Information Management Policy Off
<input checked="" type="checkbox"/>	Permissions Off
<input type="checkbox"/>	Track Changes Off
<input type="checkbox"/>	Caps Lock Off
<input type="checkbox"/>	Overtype Insert
<input type="checkbox"/>	Selection Mode
<input type="checkbox"/>	Macro Recording Not Recording
<input checked="" type="checkbox"/>	Upload Status
<input checked="" type="checkbox"/>	Document Updates Available No
<input checked="" type="checkbox"/>	View Shortcuts
<input checked="" type="checkbox"/>	Zoom 100%
<input checked="" type="checkbox"/>	Zoom Slider

**Figure 1-23** The Customize Status Bar list displays the status of various features in your document and enables you to add or remove additional options.

## What's Next?

This chapter introduced you to some of the leading new features in Word 2010, so now you can begin to experiment with the program, whether you want to make good documents look great, share your content easily with colleagues, or access your files from the Web. The next chapter introduces you to Backstage view, where you can manage your files and program information in one convenient place in Word 2010.

# Create Compelling SmartArt Diagrams and Charts

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**D**EPENDING on the nature of the document you're creating, it might be important to both show and tell readers the points you most want them to remember. You can illustrate your most important ideas—showcasing comparisons, depicting processes, and portraying important relationships among departments, vendors, sales data, and more. And in addition to the functional nature of the illustrations you can add in Word 2010, they just look nice; they add color, special effects, dimension, and more to your two-dimensional page.

In this chapter you learn about SmartArt, the diagramming tool that is included as part of Word 2010, and find out how to add and enhance charts in your Word document. What's more, the charts you add interact easily with Excel 2010, so you can use simple worksheet sections or complex calculations as part of the charts you create.

## Adding SmartArt Diagrams

The name *SmartArt* says much about the functionality of this feature, which was first made available in Word 2007. SmartArt enables you to diagram your ideas easily—in a wide variety of ways—and enhance those diagrams by adding special effects, such as shadows, 3-D effects, styles, color schemes, and more.

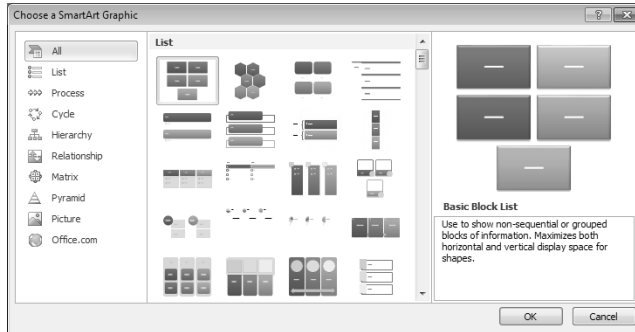
SmartArt simplifies the process of creating diagrams of all sorts. When you need to create any kind of diagram that illustrates a process, a workflow, a listing, or the way things work together, you can do it quickly with just a few clicks of the mouse using SmartArt.

SmartArt is an interactive diagramming tool that is a dramatic improvement over the diagram feature available in versions prior to Word 2007. With earlier tools, you were limited to six diagram types, and your formatting options were also limited. With SmartArt, you can choose from a large collection of diagram styles, customize them to your heart's content, and include your own pictures within the body of the diagram. What's more, you can apply a variety of design styles to add depth, shadow, shine, and perspective.



## Creating the SmartArt Diagram

When you're in the document, begin by positioning the cursor where you want the diagram to appear. Then on the Insert tab, in the Illustrations group, click SmartArt. The Choose A SmartArt Graphic dialog box appears, as shown in Figure 16-1.



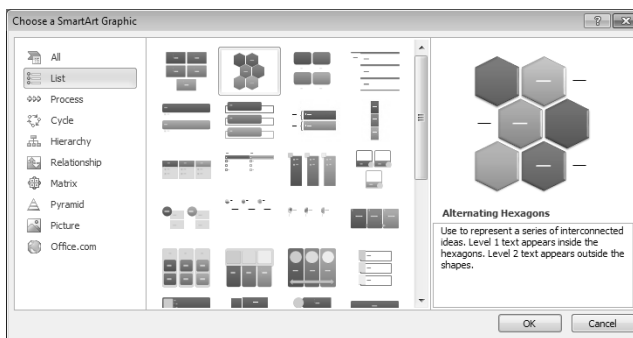
**Figure 16-1** Start your SmartArt graphic by choosing the type of diagram you want to create.

The Choose A SmartArt Graphic dialog box presents several different types of diagrams from which you can choose, each designed to convey a specific type of information.

- A list diagram displays a nonsequential series of items. You might use a list diagram to introduce a series of new products in your spring catalog.
- A process diagram can show a step-by-step process. For example, you might use a process diagram to show a new trainee how to log on to your computer system.
- A cycle diagram can show the workflow of a particular operation, typically something that is repeated in a cyclical process.
- A hierarchy diagram shows levels, so it is a logical candidate for organization charts.
- A relationship diagram shows how various items relate to each other. You might use a relationship diagram, for example, to show how different roles in a volunteer work group complement each other to provide specific services to the organization.
- A matrix diagram is helpful when you want to compare four items in a format that is easy for viewers to understand. You might use a matrix diagram to explain the research focus for each quarter of the next fiscal year.

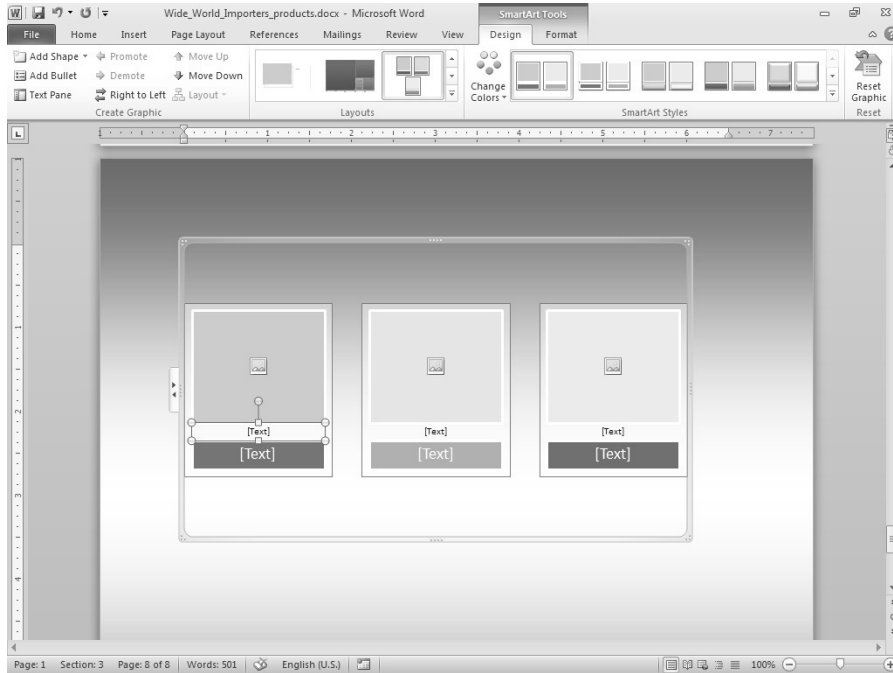
- A pyramid diagram shows items in relationship that typically build from the bottom up. A good example of a pyramid diagram is a fundraising chart in which the bottom level represents the largest number of beginning level donors who contribute to the organization, and the top level represents the smaller percentage of major donors.
- A picture diagram enables you to create a diagram in which the photos are the main point. You might use a picture diagram, for example, to show range of products in your product line and who manages the various divisions.
- The Office.com selection provides you with additional SmartArt choices you can use in a number of different diagram styles.

Begin the process of creating your SmartArt diagram by choosing the diagram type you want from the left panel of the Choose A SmartArt Graphic dialog box. Notice that when you click a diagram type, styles for that particular diagram appear in the center of the dialog box. Click the style you like, and you'll see an illustration and detailed description of the type of diagram you've selected displayed on the right (see Figure 16-2). Click OK to create the diagram.



**Figure 16-2** The SmartArt graphic style you select is displayed and described in the right side of the dialog box.

The diagram appears at the cursor position. Figure 16-3 shows a picture diagram as it first appears. Notice that SmartArt Tools contextual tabs appear automatically in the Ribbon as soon as you create the diagram. You will use the tools on the SmartArt Tools Design tab to edit and enhance the diagram by adding text boxes and pictures, changing the diagrams colors, and applying styles. Use the tools in the SmartArt Tools Format tab to change the appearance of text and shapes in the diagram.



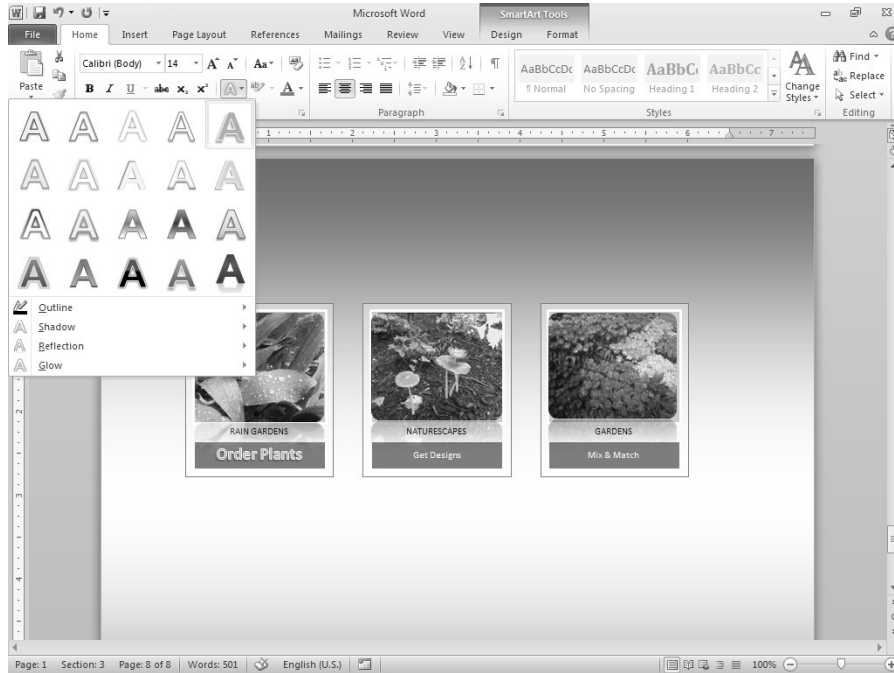
**Figure 16-3** Use the SmartArt Tools Design tab to choose the layout, style, and color for your diagram.

## Adding and Formatting Diagram Text

Adding text to your diagram is simple: just click in the first text box and type the text you want to display in the box. Press **Tab** to move to the next text box. Repeat as needed until the text boxes are filled. If you run out of text shapes and need to add a new one, click the **Add Shape** down arrow in the **Create Graphics** group on the **SmartArt Tools Design** tab and choose whether you want to add a shape after, before, above, or below the current shape.

If you prefer to enter all text at once rather than clicking individual shapes and typing text entries, you can display the **SmartArt text pane**. On the **SmartArt Tools Design** tab, click **Text Pane** in the **Create Graphic** group, then in the **Text Pane**, click in the item you want to change and type your text.

You can format the text in the diagram by highlighting the text and choosing the text options from the **Mini Toolbar** that appears above the selection. You can also apply text styles by highlighting the text, clicking the **Format** tab, and choosing the setting you want to apply in the **WordArt Styles** group. **Text Effects** is a new tool in Word 2010 with which you can apply special treatments—**Shadow**, **Reflection**, **Glow**, **Bevel**, **3-D Rotation**, and **Transform**—to the text you select (see Figure 16-4).



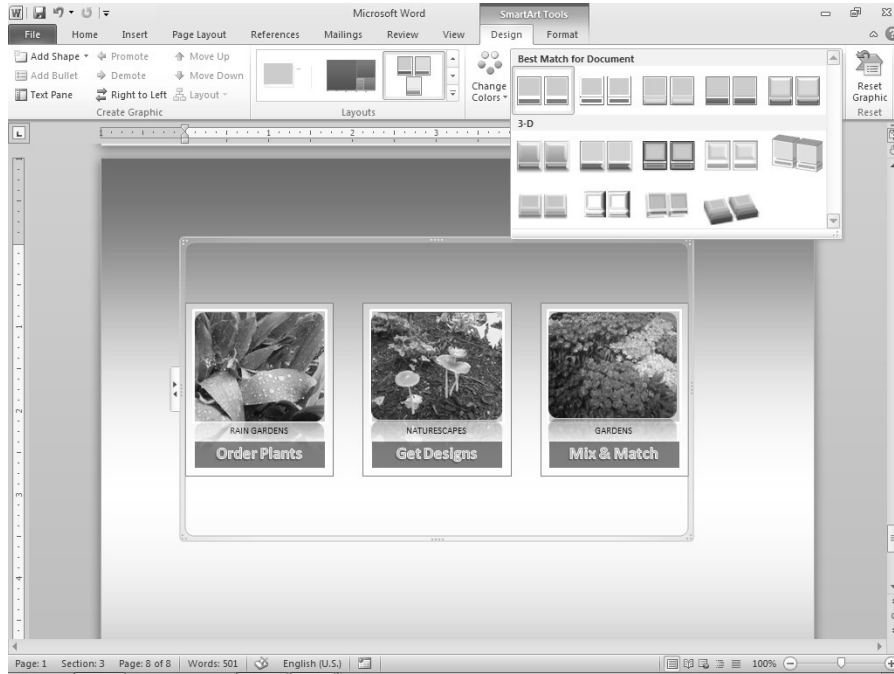
**Figure 16-4** Change the look of your diagram text by applying styles and effects from the WordArt Styles group on the SmartArt Tools Format tab.

## Making Formatting Changes in the Diagram

You can apply special formats to give your diagrams a professional look while carrying over the design of your publication in terms of color scheme, fonts, and more. Similar to the chart options available with traditional charting in Word, SmartArt diagrams also offer you a variety of layouts and styles that you can apply directly to the diagrams in your documents. To change the layout of the diagram, click it and select the Design tab on the SmartArt Tools contextual tab. Then click the More button in the Layouts gallery to display the full range of layout possibilities. Depending on the type of diagram you've created, you will see a variety of layout options. Click the one that best fits the data concepts you're trying to convey.

Like other objects in Word 2010, the available formatting settings that you can apply to your SmartArt are influenced by the theme selected for the document. You can change the colors in your SmartArt diagram by selecting a preset color palette with the Change Colors tool, which is available in the SmartArt Styles group on the SmartArt Tools Design tab. When you choose Change Colors, a palette of choices appears. The colors that correspond to the selected theme appear in the top portion of the palette. Point to the one you want to preview then click your final choice to apply it to the diagram in your document.

SmartArt Quick Styles offer you a gallery of ready-made styles (complete with 3-D settings, shadows, rotation, lighting, and more) that you can apply to your diagram with a click of the mouse. Click the More button to display all the choices and select the one you want (see Figure 16-5).



**Figure 16-5** Choose a SmartArt Style to apply 3-D effects, lighting, and more.

### Note

You might start out with rectangles in a list diagram or circles in a relationship diagram, but that doesn't mean you have to stick with those shapes. You can replace a traditional shape with a unique one of your choosing by selecting the traditional shape and clicking Change Shape in the Shapes group of the SmartArt Tools Format. Click the Change Shape down arrow and select a shape from the displayed list. The shape in your diagram is replaced with the new shape. This can be done for any part of the graphic that can be selected as a separate shape (for example, one rectangle in a list).

## Creative Charting

Charts can dramatically enhance the information you're sharing with others in the documents you create. A chart can show a reader at a glance what percentage of sales a particular product comprises. A bar chart quickly shows which division is outselling all the others. An area chart can show the results of tracking over time. The charts you include in your documents give you a way to visually showcase important data that others will understand easily. You might use a chart to:

- Announce a new sales competition for your staff.
- Show the number of volunteers each of your regional sites has trained in the previous quarter using a pie chart.
- Show the staff how the new construction on your building is coming along by placing a bar chart over a photo of the building as it's being constructed.
- Point out which sites are recruiting the greatest number of volunteers using textured columns.

### Note

What's the difference between a chart and a graph? Nothing, really. The terms are often used interchangeably to describe the graphical depiction of data—early on, the term *charting* referred to a type of mapmaking. *Graphing*, on the other hand, involved plotting data points and discerning trends and relationships. Today, the terms mean essentially the same thing; charts and graphs help you illustrate trends and relationships in your data. *Diagramming* usually refers to the process of using a specific model to generate flowcharts or diagrams.

## Introducing Word 2010 Chart Types

Charts are often used to illustrate relationships—how one item relates to another, how an item this year relates to the same item last year, how a product is selling over time. Eleven different chart types are available:

- **Column** A column chart is used to show data comparisons. You might show, for example, how two data series “stack up” against each other for the first quarter.
- **Line** A line chart plots data points over time or by category. You might use a line chart to show a trend in product returns over a six-month period.

- **Pie** A pie chart shows the relationship of different data items to the whole. Each pie comprises 100 percent of the series being graphed, and each slice is shown as a percentage of the pie. You might use a pie chart to show the relative size of individual departments in the northeastern sales division of your company.
- **Bar** Word shows a bar chart as horizontal bars, graphing data items over time (or other categories). You might use a bar chart to compare the stages of different products in a production cycle.
- **Area** An area chart gives you the means to compare data two different ways: you can show the accumulated result of the data items, and you can show how the data (and their relationship to one another) change over time. For example, you might use an area chart to show how many students took each module of the exam at two different universities.
- **XY (Scatter)** With an XY chart, you can plot pairs of data points over time. You might use an XY chart to contrast the test scores from a battery of exams given at two different universities.
- **Stock** A stock chart displays four values for a single item—open, high, low, close—and is designed to show the variance in a particular item within a specific period of time.
- **Surface** A surface chart is a great way to compare the change of three data items over time. Through the use of colored levels, a surface chart shows in three-dimension form where the data in a particular series leads (see Figure 16-6).
- **Doughnut** A doughnut chart is similar to a pie chart in that it shows the relationship between data items. Doughnut charts enable you to compare two sets of data and the way in which they relate to the whole and to each other. You might use a doughnut chart to portray two different sales campaigns. The sections of the doughnut could represent the different sales channels, and you could compare and contrast the different effects of each channel.
- **Bubble** With a bubble chart, you can plot three different data series. Each item is plotted at a particular point in time and shows the data value as a bubble. You can see, for example, which accounts had the highest charges during the second quarter.
- **Radar** A radar chart plots multiple data points and shows their relation to a center point. You might use a radar chart to show how each regional sales division fared in a recent sales competition.

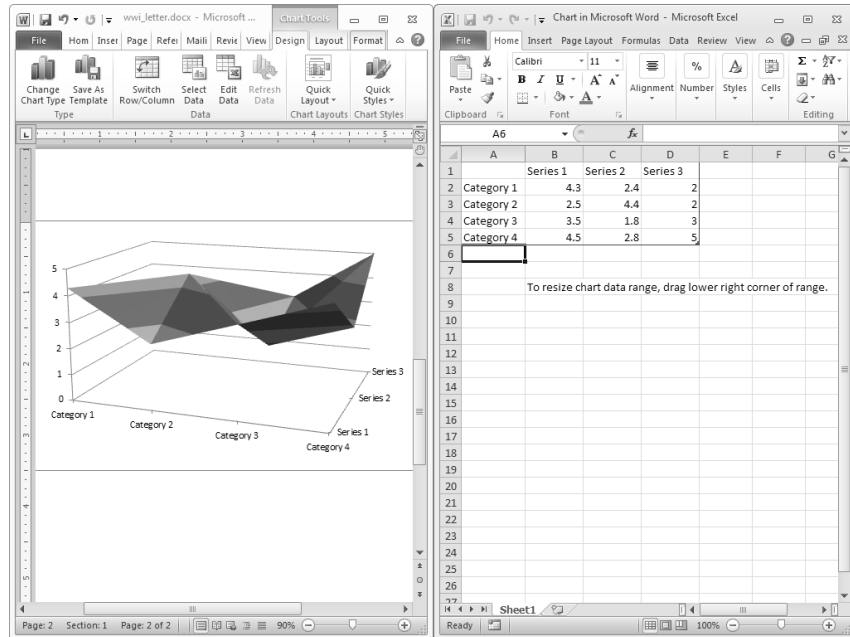


Figure 16-6 With a surface chart, you can illustrate series data in three dimensions.

## Creating a Basic Chart

The process of creating a chart in Word is simple. First click to position the cursor wherever you want the chart to appear (you can move the chart later if you choose) then follow these steps:

1. On the Insert tab (on the Ribbon), click Chart in the Illustrations group.

The Insert Chart dialog box appears, as shown in Figure 16-7.

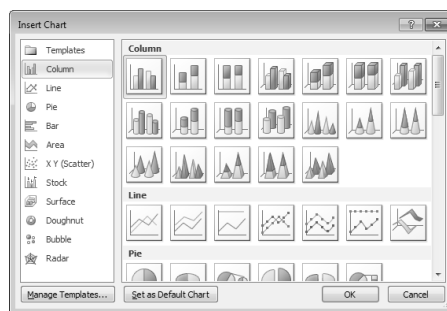


Figure 16-7 The Insert Chart dialog box is where you can view and choose the type of chart that meets your needs.

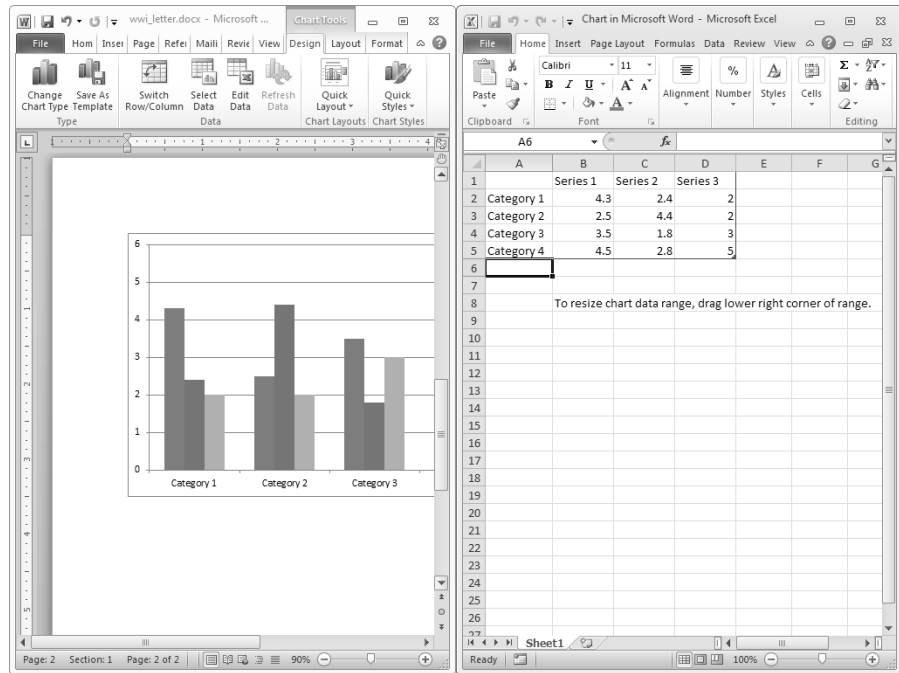


2. Choose the chart type you want to create by clicking it in the left pane of the Insert Chart dialog box.

The gallery area on the right shows the various styles available for the chart type you selected. Click OK to create the chart.

The default chart in the type you selected appears in the document on the left side of the Word window; on the right side of the window, Excel displays a datasheet that includes placeholder data (see Figure 16-8). You can now modify the data so it is relevant to your document.

3. Click the close box to close the datasheet, and the chart in your document is updated accordingly.



**Figure 16-8** As soon as you create the chart, a datasheet with placeholder data appears. Replace the data with your own, and the chart is updated automatically.

That's all there is to adding your first chart to a Word document. But now comes the fun part—enhancing the chart with the Word Chart Tools.

### Note

The gallery area of the Insert Chart dialog box contains all the chart types available to you, so if you prefer, you can simply use the vertical scroll bar in the dialog box to view all the different chart styles. That way, if you really aren't sure what the type of chart you want to create is called—but you know it when you see it—you can look over all the styles quickly and make your selection by double-clicking it.

## Changing the Chart Type

Making sure you have the right chart for the data you're displaying is an important part of communicating your concepts most effectively. Some charts, such as bar and column charts, are best for comparing data items—for example, tracking the sales of apples compared to oranges. Other charts, such as pie charts, are better for showing the relation of individual items to a whole—such as the fundraising totals of your two top volunteer groups as they compare to total fundraising dollars in August 2010.

Word makes it simple for you to select and change chart types. Start by creating a new chart or by displaying the chart you've already created. Click the chart (if necessary) so that the contextual Chart Tools are displayed on the Ribbon. On the Design tab, click Change Chart Type in the Type group (on the far left side of the Ribbon). The Change Chart Type dialog box (which you saw earlier as the Insert Chart dialog box) opens, offering you the range of chart types that were available to you when you initially created the chart. Simply click the chart type you want, click OK, and Word changes the display of the chart in your document and modifies the datasheet if needed.

### Note

If you really like the chart type you've selected, you can make it the default chart that is used automatically whenever you create a new one. Simply click Set As Default Chart in the Insert Chart (or Change Chart Type) dialog box. Each time you create a new chart, the chart type you selected will be used by default.

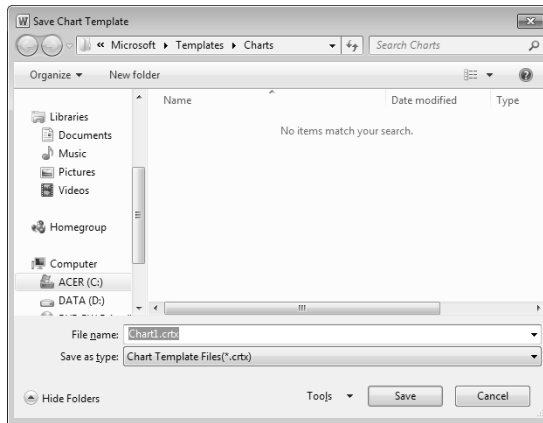
## Creating a Chart Template

Word offers so many ways to enhance the design of your charts that you might want to create your own templates so the charts you create are consistent in all of your documents. If you work for a company that standardizes its published materials, creating and using a

custom template gives you the means to make your charts distinctive while keeping them professionally appealing and consistent with your overall brand.

After you've created, enhanced, and saved your chart (which you learn how to do on page 506), you can save it as a template. It will then be available to you in the Templates folder that appears in the left pane of the Insert Chart dialog box.

To create a template based on an existing chart, simply select the chart and then select the Design tab in the contextual Chart Tools. In the Type group, click the Save As Template option. In the Save Chart Template dialog box, enter a name for the new chart and click Save (see Figure 16-9). Word saves the chart by default in the Templates folder, making it available to all your other Office applications as well. The next time you open the Insert Chart dialog box, the template you saved will be available in the Chart Templates folder.



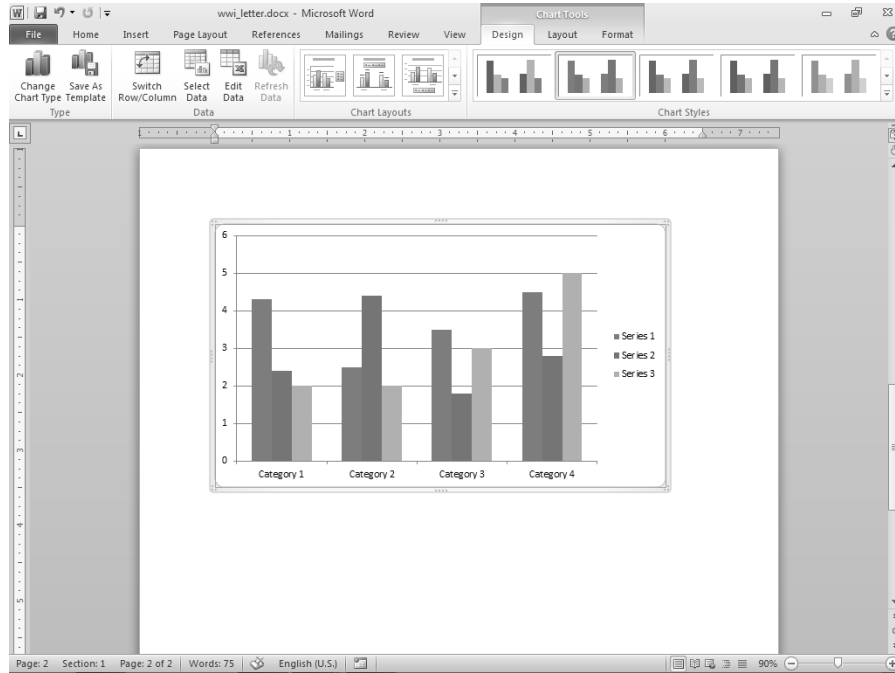
**Figure 16-9** Save a customized chart as a template so that you can use it in other documents you create.

### Note

If you change the theme selected for your document, any charts you create using a chart template will not update to reflect the new theme. To update the format of your chart, click the edge of the chart frame to select it, and then click **Reset To Match Style** in the **Current Selection** group on the **Format** tab of the contextual **Chart Tools**.

## Understanding the Chart Tools

As soon as you create a chart, Word displays the contextual Chart Tools, which offers you a collection of specialized tools you'll use to design, enhance, format, and save the chart you create (see Figure 16-10).



**Figure 16-10** The contextual Chart Tools enable you to change the design, layout, and format of your chart.

The contextual Chart Tools offer three tabs with different sets of tools for different types of tasks.

- **Design** With the Design tab, you can change the type of your chart, work with chart data, select a chart layout, and choose the style and color for the chart you want to create.
- **Layout** This tab lets you focus on specific chart elements. With the Layout tools, you can add pictures, shapes, and more; add and format labels; modify the axes in the chart; add color, pictures, or 3-D effects to the background; and insert elements like trend lines, markers, and more that help readers analyze the data they are reviewing.

- **Format** The Format tab includes tools that let you enhance the look of your chart by choosing the size of shapes on the chart; adding shadows, fills, and outlines; changing the size of the chart; and selecting text wrapping and positioning options.

Throughout the rest of this chapter, you'll learn more about when to use each of the tabs in Chart Tools to change, enhance, and finalize the charts in your Word documents.

## Entering Chart Data

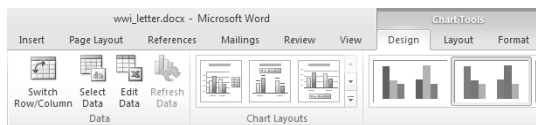
When you first create a new chart, Word inserts a default set of dummy data into the datasheet and displays the datasheet in Excel. You use the datasheet to enter, arrange, and select the data you want to include in your chart. Throughout the life of your Word document, you can add to and update the information in the datasheet as needed, ensuring that your chart always stays fresh and reflects your most current data.

### Note

You can choose to link or embed chart data in a Word document. If you link a chart in your Word document to an external source, it will be updated whenever the source document changes. If you embed a chart in your document, you'll be able to edit the chart as you would normally, by double-clicking it in the hosting document.

You will use the Data group (available on the Chart Tools Design tab) to work with your chart's datasheet (see Figure 16-11). Here's a quick look at the tools in that group:

- **Switch Row/Column** With this tool, you can swap rows and columns to create a different display of the data in your datasheet.
- **Select Data** Displays the Select Data Source dialog box, in which you can choose the data range you want to use for the chart. Additionally, you can choose the series and category items you want to include or hide from display.
- **Edit Data** Displays the datasheet so that you can change, add to, or delete information on the datasheet.



**Figure 16-11** Use the Data group on the Chart Tools Design tab to work with the data in your chart's datasheet.

## Working with the Datasheet

Figure 16-12 shows the datasheet that appears when you create a new pie chart in Word. As you can see, the series names (Series 1, Series 2, and Series 3) and the category names are all generic. The data in the datasheet doesn't mean anything at this point—it simply provides the chart engine with something to display in the sample chart.

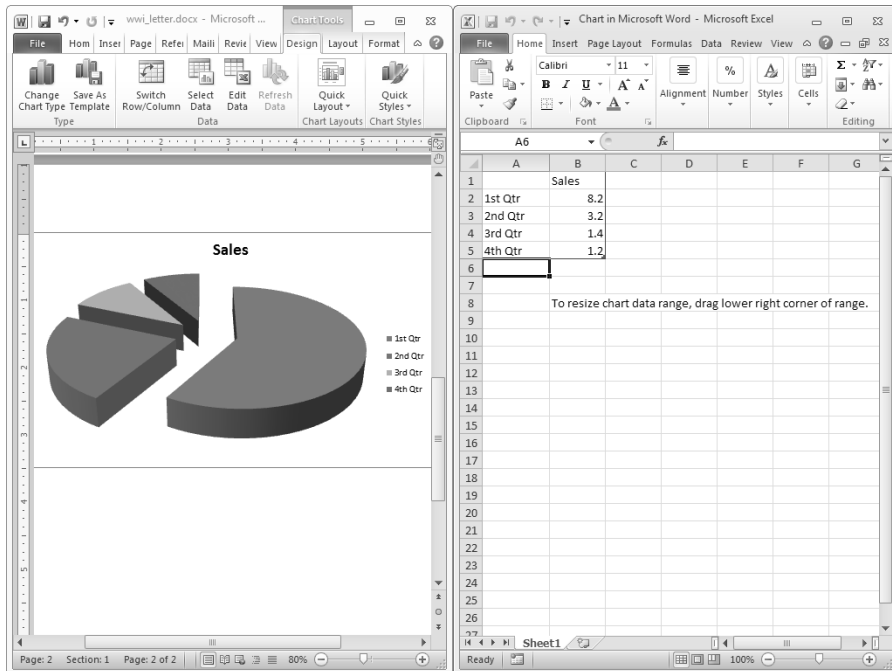


Figure 16-12 The datasheet displays the data values and labels used to create your chart.

### Note

If you close the datasheet by clicking the Excel close button, you can redisplay it while you edit the chart by clicking Edit Data in the Data group on the Design tab of the contextual Chart Tools.

The datasheet is actually an Excel worksheet, so the tools on the Ribbon might look familiar to you. Changing the data in the datasheet is a simple matter of clicking in the cell you want to change and typing the new information. You'll find the following items on the datasheet.

- **Categories** The items in the columns are the categories placed along the horizontal axis of the chart. Categories might include months, quarters, stages of a project, or some other unit by which the value can be measured.
- **Data Series** The data series show the items that are being graphed, according to the categories selected.
- **Values** The data entered in the cells of the datasheet are scaled against the value axis, which is the vertical axis.

### Note

By default, the datasheet includes data used to display the chart you add to your page. The first thing you will most likely do when you open the datasheet will be to delete the existing data so that you can enter your own. You can type the values directly into the cells or copy and paste the information into the datasheet from another source.

## Changing the Data Arrangement

By default, the new Word chart displays the categories along the horizontal axis and the values along the vertical axis, but if you choose, you can flip that configuration to display your data differently.

To change the arrangement of the data in your chart, follow these steps:

1. Select the chart you want to change.  
The Chart Tools tabs appear.
2. On the Design tab, in the Data group, click Switch Row/Column.  
The chart is redrawn automatically.

### Tip

Although you're creating a chart for use in your Word document, you might want to use data from other programs to create the chart. Because the chart datasheet is actually an Excel worksheet, you can link to external data sources supported by Excel. To display your choices for using external data in your Excel datasheet, click the Data tab in the datasheet and choose the option in the Get External Data group that best reflects the type of data you want to use. For more about working with Excel 2010, see *Microsoft Excel 2010 Inside Out*, by Mark Dodge and Craig Stinson (Microsoft Press, 2010).

## Editing and Enhancing Chart Information

The chart that Word 2010 adds to your document will be fairly straightforward, without much formatting or color. After you create the basic chart, you can add to, edit, and enhance your chart in a number of different ways. Begin by clicking the chart you want to change; the contextual Chart Tools appears automatically along the top of the Ribbon. You use the Chart Tools, shown in Figure 16-13, to change the chart layout, choose a chart style (including colors and shadow effects), add titles and labels, change the look of the background and axes, and much more. The sections that follow show you how to add specific items to your charts to make them easier for readers to understand.

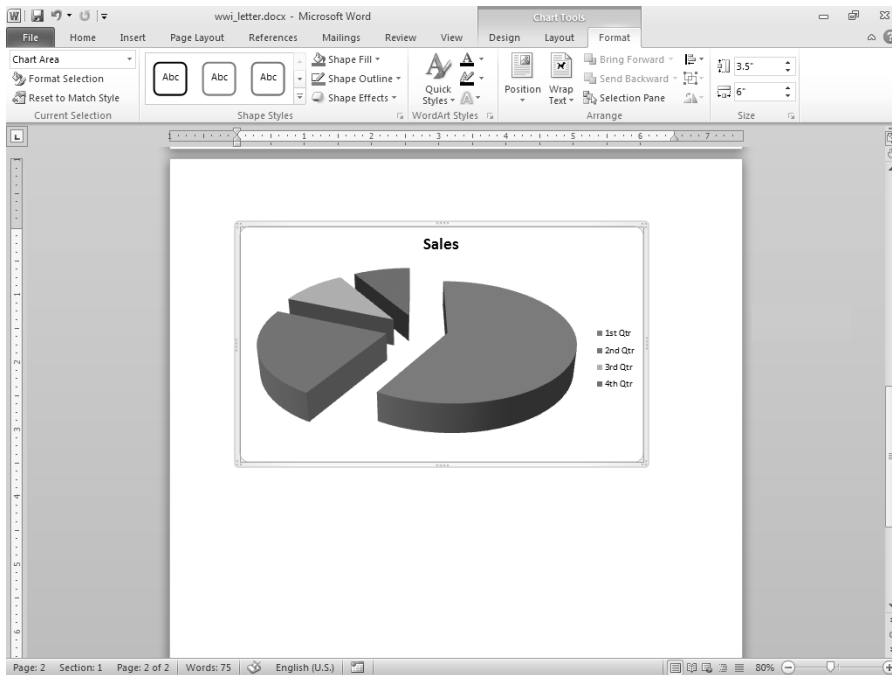


Figure 16-13 Use the contextual Chart Tools to edit and enhance the charts in your document.

### Note

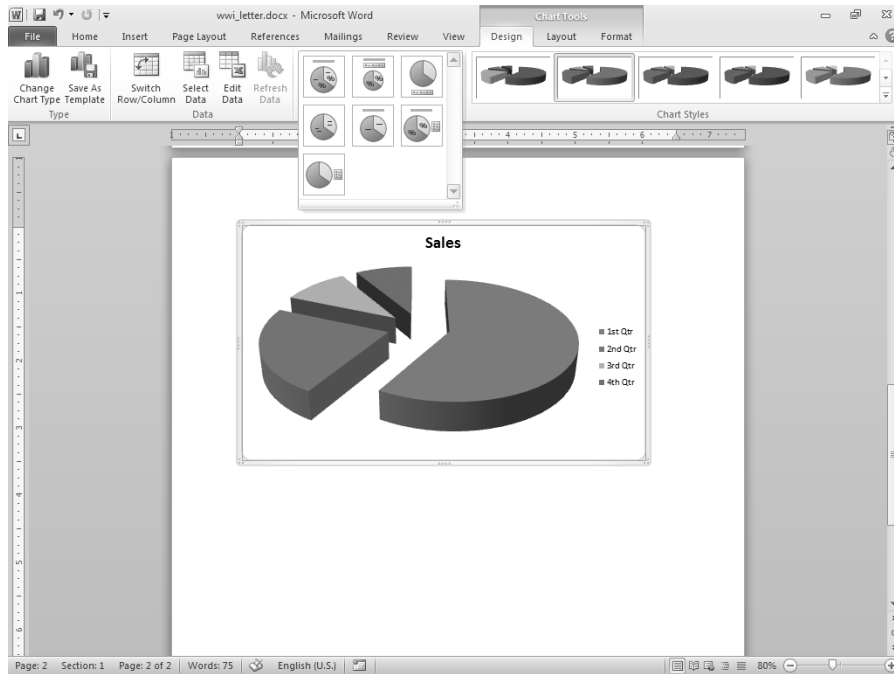
Although many of the elements you'll find on the Chart Tools tab relate to all the different chart types, some controls are disabled for certain charts. For example, the tools in the Axes group on the Layout tab are disabled when a pie chart is selected because they don't apply to that type of chart.



## Choosing a New Chart Layout

If you spend some time working on a chart and just don't feel it portrays what you want to convey, you can easily switch chart types by applying a new layout to the chart. A chart layout is like a template—complete with a legend style, data labels, and more—that you apply to the chart you've already created. You can choose a layout for your chart when you want to save yourself the time and trouble of choosing a number of chart options individually.

To apply a chart layout, click the chart to select it, and then on the Chart Tools Design tab, click the More button in the lower-right corner of the Chart Layouts gallery to display the whole collection of layouts (see Figure 16-14). Simply click the layout to apply it to your chart.



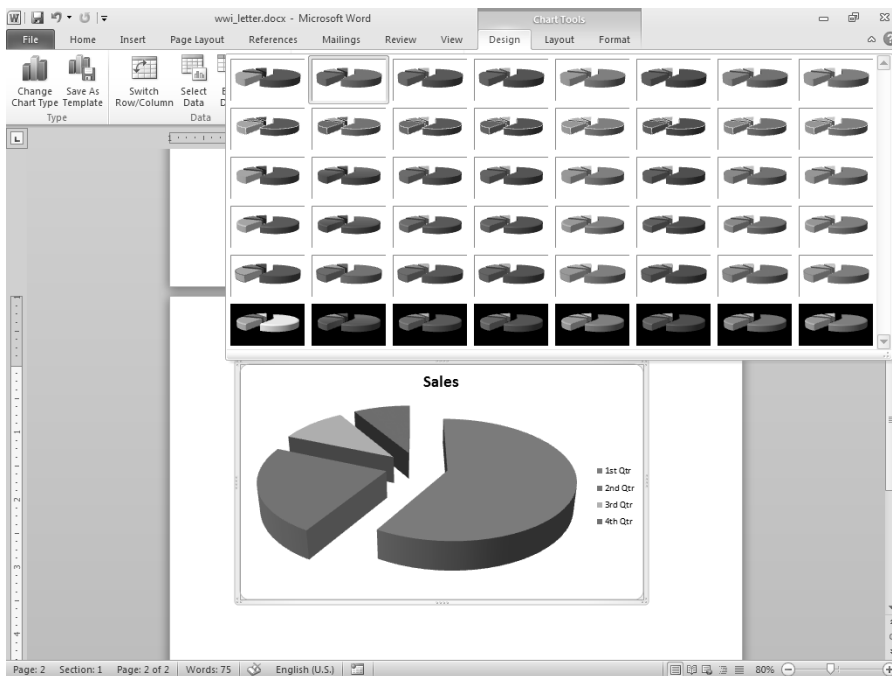
**Figure 16-14** Use the Chart Layouts gallery to apply specific chart formats to the charts in your document.

## Applying a Chart Style

Word includes another design feature that makes creating a professional chart much easier. The Chart Style gallery includes dozens of visual styles that you can apply to a chart in your document. Chart Styles include:

- Color selection
- 3-D effects
- Shadow effects
- Outline style and color
- Background effects

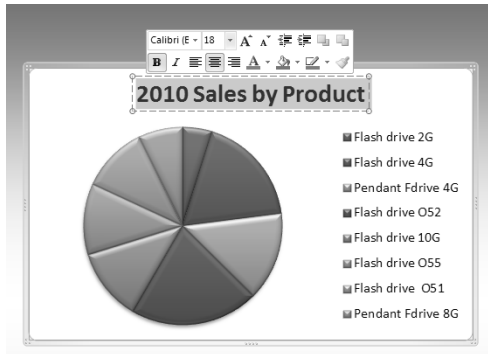
To apply a chart style, select the chart, and then on the Chart Tools Design tab, click the More button in the lower-right corner of the Chart Styles gallery and then choose the style you want from the displayed collection (see Figure 16-15).



**Figure 16-15** The Chart Styles gallery gives your chart a professional look with the click of a button.

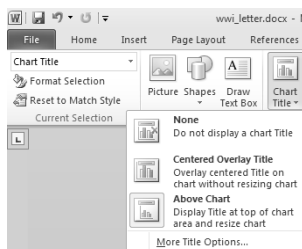
## Change Fonts with the Mini Toolbar

**B**y now you've probably noticed that Word 2010 is all about context. Whatever project you're working on, Word offers you just the tools you need to complete it. When you want to change the font used in a chart, simply highlight the text you want to change. The Mini Toolbar appears over the text with which you can easily choose a new font, change the size, make the font larger or smaller, change the color, and more. Simply click your choice and the text is changed. All things should be so simple.



## Adding a Chart Title

Not all charts need titles, but a chart title can help readers understand the “big picture” you’re trying to communicate. To add a title to your chart, click Chart Title in the Labels group on the Layout tab of the contextual Chart Tools. In the gallery, choose whether you want the title to be centered on the chart or placed above the chart. (If you decide later that you want to move the title, you can simply drag it to the point on the chart where you want it to appear.) Centered Overlay Title enables the chart to be displayed at maximum size (which is important if you have a fairly complex chart), while Above Chart reduces the chart size slightly to make room for the title. Experiment with each choice to find the one that’s right for your chart.



**Note**

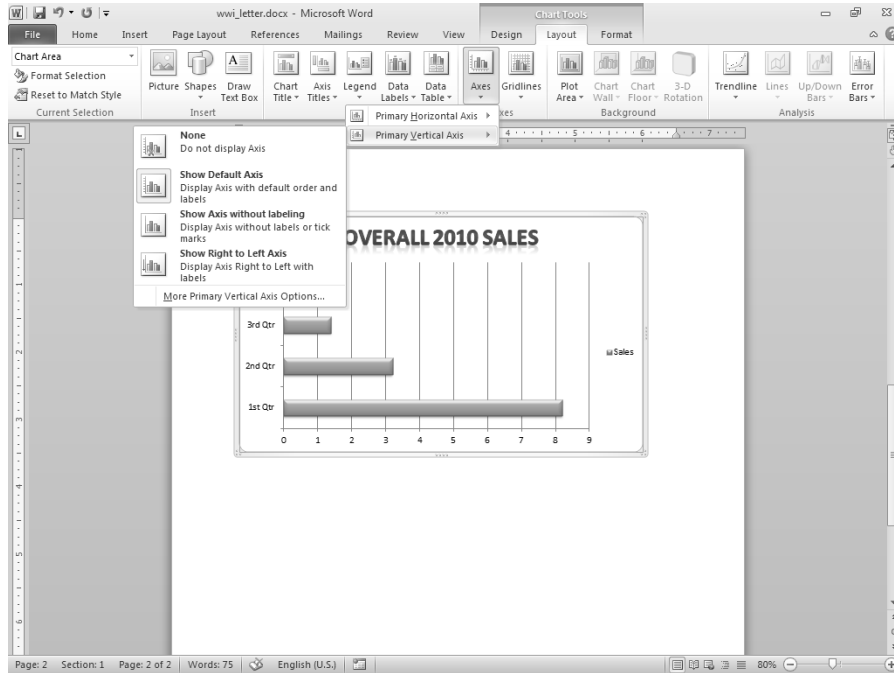
Chances are that you won't have a lot of room in your document for lengthy chart titles. A good title pulls out key words that reflect what the chart portrays. If you're comparing volunteer recruitment methods, "Recruitment Methods Comparison" works. Not exciting, but accurate. If you can think of something exciting too, all the better.

## Working with Axes

The axes of your chart are important in that they set up the structure for the way in which data is displayed. You can use two different tools in the contextual Chart Tools to work with axes. Both are found on the Layout tab.

If you want to instruct Word to display the title of an axis, click Axis Titles in the Labels group. To add an axis title to your chart, begin by clicking Axis Titles and pointing to the axis you want to change (Primary Horizontal Axis or Primary Vertical Axis). When you point to the Horizontal Axis selection, choose Show Title Below Axis to add the title text box to the chart. (You can click and drag the title box anywhere on the chart you'd like it to appear—but be sure to keep it close to the axis so your readers will understand what it refers to.) If you select Primary Vertical Axis, you will see three choices: Rotated Title, Vertical Title, and Horizontal Title. Select your display choice, and then simply click in the text box and type the text for your axis title.

If you want to change the way in which information is displayed along the axis, you can choose Axes in the Axes group. When you click the Axes tool, a list appears, offering Primary Horizontal Axis and Primary Vertical Axis as options. Choose the axis you want to change, and another set of choices appears (see Figure 16-16). For the horizontal axis, your choices involve whether the axis runs right to left (or vice versa) and where the data labels appear. For the vertical axis, you can choose the value increments you want to appear on the axis (thousands, millions, or billions).

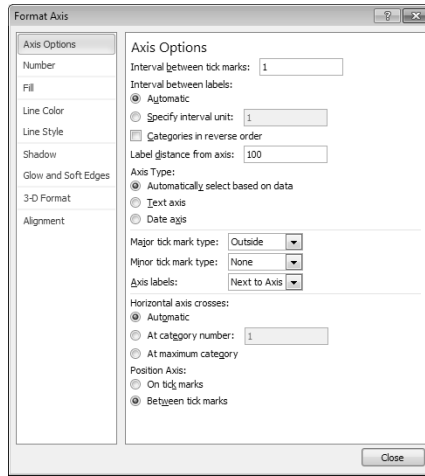


**Figure 16-16** Choose the axis you want to change and make your selection from the gallery.

If you want to further control the axes in your chart, you can choose More Primary Vertical Axis Options or More Primary Horizontal Axis Options at the bottom of each of the respective galleries. To further refine how your axes appear, you need to display the Format Axis dialog box, as shown in Figure 16-17. In this dialog box, you can choose the increments for the values on the vertical axis, set the tick mark type, and determine the placement of the chart floor. In the Format Axis dialog box for the horizontal axis, you can also set axis type and tick mark settings, and choose where the vertical axis crosses the horizontal axis. Additionally, in both dialog boxes, you can choose line color and fill, shadow, and 3-D effects for the axes.

### Note

You will be able to choose settings for the chart floor only when you are working with a 3-D chart.



**Figure 16-17** You can choose additional options for the axes in your chart by using the Format Axis dialog box.

### Note

To hide or display axis tick marks, display the Format Axis dialog box and clear or select the Major Tick Mark Type and Minor Tick Mark Type options, as appropriate. Click Close to save your settings.

## Add Gridlines and Trendlines

If you're working with complicated charts that have multiple data series, gridlines can help clarify the comparisons and conclusions you want readers to draw from your chart. Select the Gridlines tool in the Axes group on the Chart Tools Layout tab. Then click either Primary Horizontal Gridlines or Primary Vertical Gridlines. Both choices give you the option of selecting major gridlines, minor gridlines, or major and minor gridlines.

### Note

You can be creative with the gridlines in your chart if you want to shake things up a little bit. Word 2010 enables you to choose new gradients for your gridlines and add shadows and arrows. Simply right-click the gridline you want to change in the chart and select Format Gridlines. The dialog box that appears will be either Format Major Gridlines or Format Minor Gridlines, depending on which set of gridlines you selected.

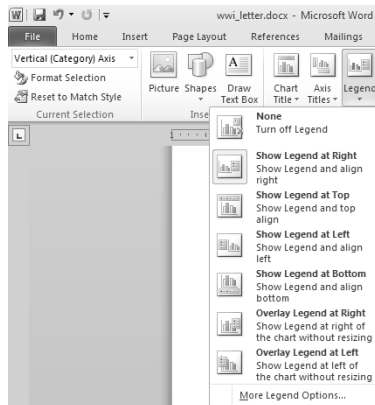
Choose Line Color, Line Style, Shadow, or Glow and Soft Edges in the left panel and then select the options you want to apply to your chart. Click Close to save your settings and apply them to your chart.

Be forewarned, however: with gridlines, a little goes a long way, so be sure to add only what your reader needs to understand your data. Too many lines will clutter up your chart and make it more difficult for readers to decipher; they can even render the chart unreadable if there are too many too close together.

## Displaying and Positioning a Legend

Word assumes that you want a legend for your chart when you first create it. If you don't feel the legend is needed and want to have more space for your chart, you can remove the legend by clicking Legend in the Labels group on the Layout tab (available in the Chart Tools). When you choose None (the first option on the list), the legend is hidden. The chart is enlarged to fill the space the legend previously occupied.

You can also control where the legend is placed in the chart by clicking the Legend tool in the Labels group. A range of options appears from which you can choose, as shown in Figure 16-18.



**Figure 16-18** With the Legend tool in the Labels group, you can control the placement of your chart legend.

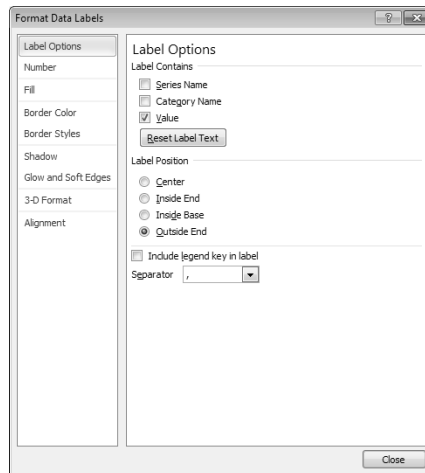
### Tip

You can further change and enhance the legend you add to your chart by clicking **More Legend Options** at the bottom of the options list that appears when you click **Legends** in the Labels group.

## Working with Data Labels

Data labels are helpful when you need to give the reader further clues about which data items go with which series or category. Word gives you the ability to add several different kinds of data labels to your charts. You might want to add percentages to pie slices, for example, or category labels to stacked bars. Click Data Labels in the Labels group to display a list of placement choices for the data labels on your chart.

By default, Word displays data values in the pie slices or bars of your chart. You can change the type of information displayed and add special features such as color, shadows, outlines, and 3-D options by choosing Data Labels in the Labels group and clicking More Data Label Options. In the Format Data Labels dialog box (see Figure 16-19), you can choose the label contents you want to display (series name, category name, value, or percentage).



**Figure 16-19** Display and enhance data labels on your chart using options in the Format Data Labels dialog box.

### Note

You can choose to display more than one type of label. For example, you might want to display both percentages and category names on a pie chart. If you select more than one label type, use a separator to distinguish the labels. Click the Separator arrow to display a list of choices and then click the one you want to use.

One more way to ensure that readers get the connection between your data trends and the categories being plotted: you can use the Legend Key feature to add small legend tags to



the left of each data label. Readers will be able to see at a glance which items relate to the categories in your chart legend.

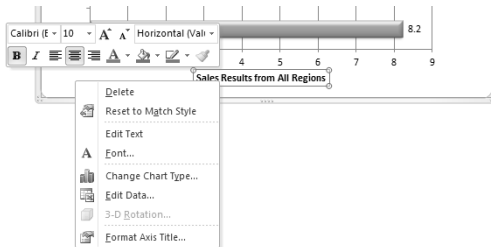
## Note

The data labels Word uses are taken directly from your datasheet. If you want to change a data label on the chart, it's best to go back to the datasheet and make the change there. Otherwise, the label change might not "stick," and you might see the same old label displayed the next time you view your chart.

## TROUBLESHOOTING

*I can't see axis titles in my chart.*

If you're having trouble seeing the axis titles along the Category and Values axes on your chart, the chart area might be too small to display all the chart information successfully. Try enlarging the chart by clicking it and then dragging one of the resize handles outward. If that doesn't do the trick, right-click the axis title while editing the chart and then choose a different font or font size on the Mini Toolbar.

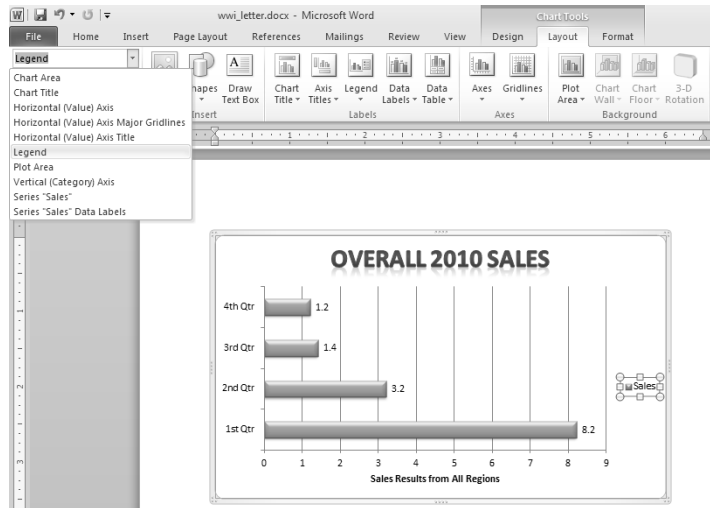


## Formatting Charts

Word gives you the ability to format all the different elements included in your chart. You might want to change the font of a title, resize the labels, change the background color, change the line thickness, apply a pattern, or perform any number of other tricks—including adding drop shadows, glow effects, or 3-D enhancements.

To choose the chart object you want to work with, click the chart, choose the Layout tab on the Chart Tools, and then click the Chart Elements arrow in the Current Selection group. A list of possible objects appears, as shown in Figure 16-20. When you click your choice, Word selects that item in the chart. You can then right-click the item to display a format

choice—for example, right-clicking a legend displays a shortcut menu including the Format Legend command. When you select that command, a formatting dialog box appears in which you can select the colors, styles, and placement for the legend.



**Figure 16-20** Use the Chart Elements list to select the chart element you want to change.

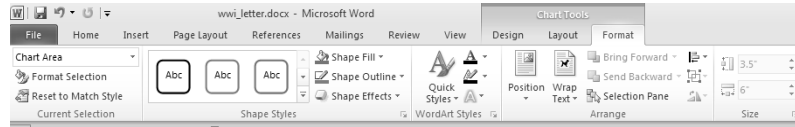
The formatting commands available vary depending on the type of chart you're creating and the chart element you've selected. You'll see a different set of options, for example, when you right-click a chart axis than you will when you right-click the legend.

## Changing the Format of Your Chart Elements

Word includes a Ribbon full of formatting choices that enable you to add color and texture to the shapes of the elements in your chart. Additionally, you can use the Format options to apply special effects to your text by changing color, adding mirroring, shadowing, glow effects, and more. Here are a few possibilities to consider as you think about the ways you want to enhance your chart.

- Do you want a border around your chart? If so, what kind? You make those choices on the Format tab of the Chart Tools.
- Do you want to choose a different color or line thickness for the border of your chart? Look in the Shape Styles group on the Format tab for the choices you need.
- Would you like to add a drop shadow to the chart? Click the Shape Effects down arrow, point to Shadow, and then choose the style you want.
- Do you want to apply a special text effect to your title or axes titles? Choose a Word-Art style that reflects the way you want the text in your chart to appear.

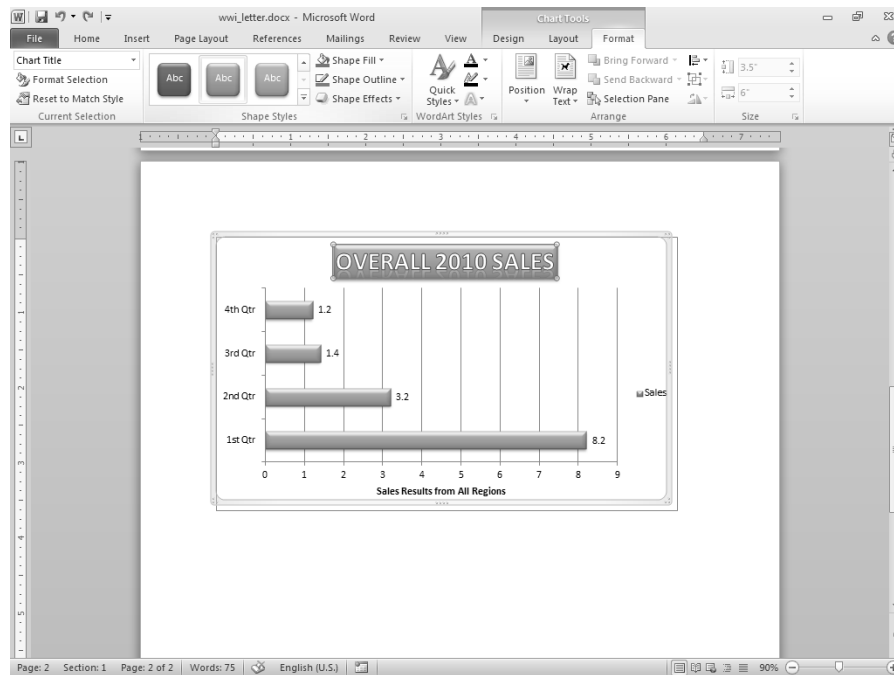
You can change each of these items by first selecting the chart you want to change and then by selecting the Format tab on the Chart Tools. Figure 16-21 shows the commands that are available when the Format tab is selected.



**Figure 16-21** The Format tab includes tools for changing colors, shapes, shadows, and more in your charts.

## Formatting Shapes

Word provides you with an almost unlimited number of ways to enhance charts in your documents. One way you can make a big visual difference is by applying formats to the shapes that make up the chart. For example, consider the chart title in Figure 16-22. The 3-D style applied to the title is one of many available in the Shape Styles gallery (on the Chart Tools Format tab).



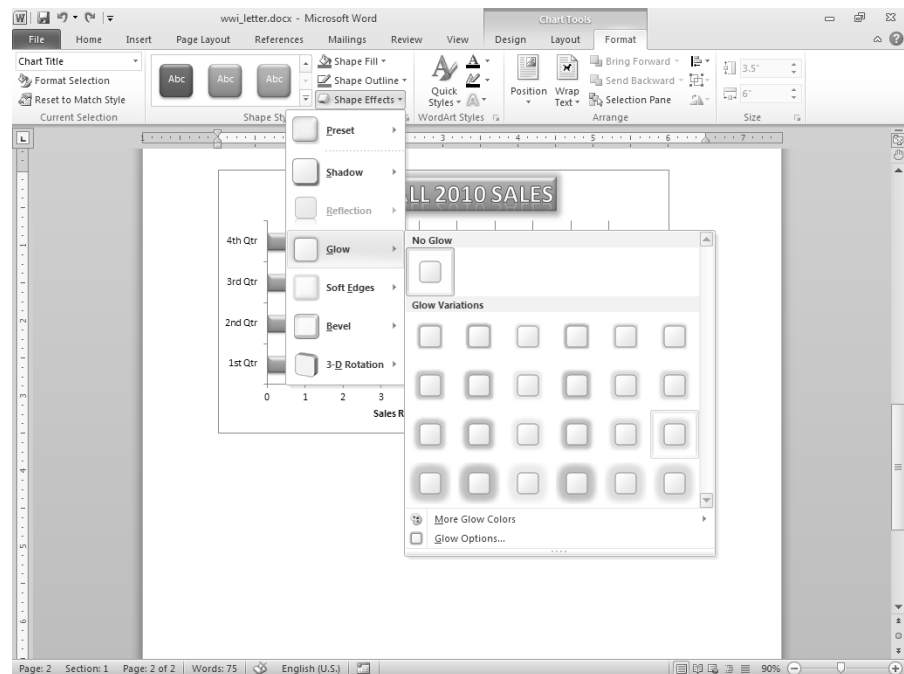
**Figure 16-22** You can add special styles to the shapes in your chart by using the Shape Styles gallery.

Begin by selecting the object in your chart that you want to change. Anything that you can click qualifies—you can change the title, the label area, the individual data series, the axes, and more. When you select an element, Word automatically updates the Shape Styles to show the styles available for that chart element. You can click the More button to see the entire gallery of styles available for the selected element. Click your selection to apply it to the chart.

## Adding Shadows, Glows, and More

You can make further changes to the shape you've selected using the additional choices in the Shape Styles group on the Format tab.

- **Shape Fill** This option displays a palette in which you can change the color, gradient, pattern, or texture of the selected shape.
- **Shape Outline** This choice includes color selections as well as line width and style choices that change the outline of the shape.
- **Shape Effects** Select Shape Effects to display a gallery of style choices with which you can add shadows, make the shape glow, soften the edges, rotate the shape in 3-D, and much more (see Figure 16-23).



**Figure 16-23** The Shape Effects gallery gives you options to dramatically change the look of shapes in your chart.

## What's Next?

This chapter showed you how the SmartArt and chart features in Word 2010 make it easy to create, modify, and enhance diagrams and charts in your Word documents. The next chapter continues this creative focus by showing you how to make the most of Word's ability to add impact with pictures and objects. Additionally, you'll find out how to arrange art objects on the page to help give your document that finished, professional look.



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## About the Author

**Katherine Murray** wrote her first book about Microsoft Word back in the dark ages when it was only available in a DOS version (remember that?). Over the years, Word has been her favorite program, and she's seen it grow from a mind-blowing word processing program (*that actually shows line breaks on the screen!*) to a full-featured, complex (and overweight, some might say) program that does everything you could ever want a word processor to do, including sewing a button on your shirt. Finally she's seen Word mature into an elegant, smart, efficient program that provides the flexibility to produce content for a variety of platforms, graphic design tools to help even art-challenged writers look good, and enough high-end features that proficient users can streamline their tasks and produce smart content that hits the mark but doesn't gobble up their creative time.

Katherine writes about all sorts of Microsoft Office technologies, and, true to what she writes about, she outputs the content she writes through multiple channels: As books, e-books, presentations, video demonstrations, articles (for CNET's TechRepublic and Microsoft.com), and online learning courses with Microsoft Learning. She also blogs regularly (her Office blog is called, appropriately, BlogOffice) and loves gardening, cooking, and doing just about anything under the sun with her kids, grandkids, and animals.

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