

SESSION HANDOUT

Microsoft® Word – Intermediate Word Formatting – Applied Epic

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Target Audience:

<input type="checkbox"/>	Accountant/Bookkeeper	<input type="checkbox"/>	Producer
<input type="checkbox"/>	CSR	<input type="checkbox"/>	Trainer
<input type="checkbox"/>	Carrier	<input type="checkbox"/>	Vendor
<input checked="" type="checkbox"/>	IT Manager/Systems Coordinator	<input type="checkbox"/>	ALL
<input checked="" type="checkbox"/>	Operations	<input checked="" type="checkbox"/>	Other: Word Processing
<input type="checkbox"/>	Principal/Owner		

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Seminar Type: IT, Microsoft Products, Servicing and Workflows, Training and Staff Development

Seminar Level: Intermediate: An intermediate-level class takes the concepts originated in a basic-level course and adds more layers or parallel concepts. For functional courses, these classes will require the participants or attendees to have some basis to work from, as they will be learning new facets of the agency management system or software program.

Class Description: Using the previously installed proposal set, this intermediate session will review tools for document template improvement. Use of tables, borders and shading, section and page breaks, and page headers and footers will be included.

Learning Outcomes:

- Insert or remove breaks in order to apply/change page formatting.
- Use tables, with or without borders, to organize data within document templates.
- Determine the best use of headers and footers for your proposal needs.

Assumptions: This seminar is based on the following:

Applied Epic 2014

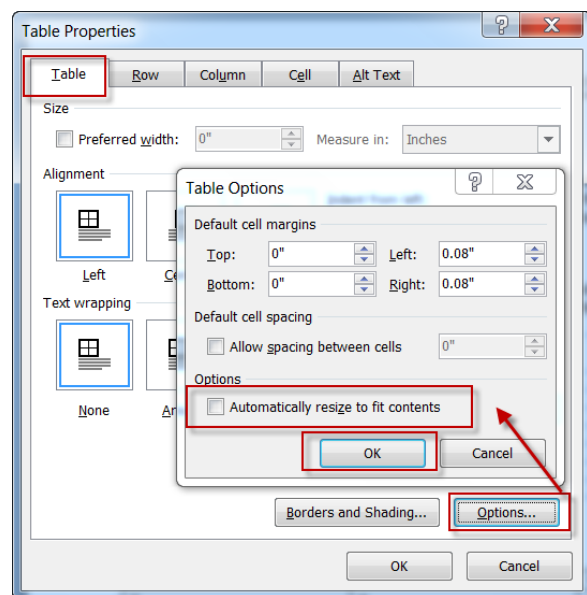
Microsoft® Word® Version 2010, 2013

Tables

Tables are an excellent tool to use for aligning data within proposal or document templates. The basics of how to insert a table are included in Appendix A if you have not already used this feature. The intent of this section of our class is to explore some features of tables where you may not yet have ventured.

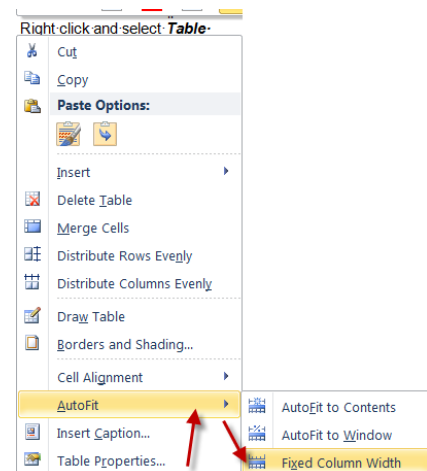
Table Properties/Table Options

- **Table Options** – Always when creating new tables, after inserting the table, select the entire table, right-click and select **Table Properties**. On the **Table** tab, select **Options**:
 - **Cell Automatic Resizing** – To avoid having the inserting of fields or text into a cell send the cell zinging across the page, UNCHECK the *Automatically resize to fit contents* selection.
 - Optionally select any default **cell margins** desired
 - **Preferred table width** may be selected on this tab as well as **cell alignment** (though additional options are available elsewhere).



An additional option for controlling **table resizing** is to select the table again, right-click, and select **AutoFit, Fixed Column Width**.

Note that **AutoFit to Window** will size the table to the margins automatically, which you may or may not wish to use, depending upon the design of the document. If this option is chosen, afterwards re-select the **Fixed Column Width**, or go through the table properties to UNCHECK the *Automatically resize to fit contents* selection as the **AutoFit to Window** automatically changes that property.



Note that the **AutoFit** Option is available from the Table Tools ribbon on the Layout sub-tab.

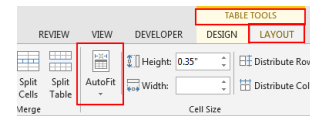
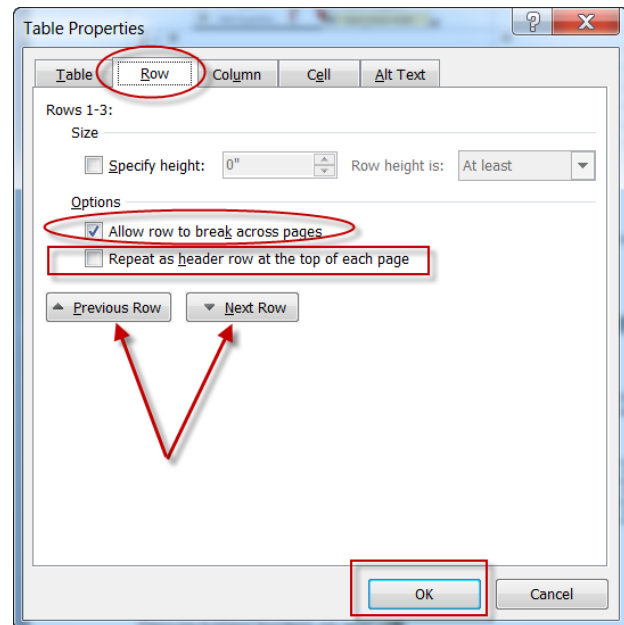
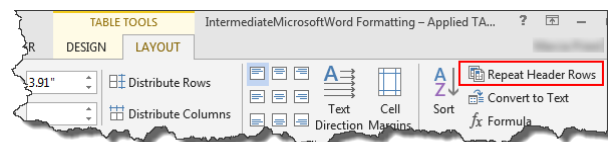


Table Properties/Row Options

- **Row Options** – After filling the row with everything needed in the template, select the row, right-click, Table Properties. Select the Row tab.
 - For templates where having a row break across a page is undesirable, uncheck the box for *Allow row to break across pages*.
 - For header rows of a table (e.g., Vehicle Schedule) check the *Repeat as header row at the top of each page* box.
 - *Specify height* of the row option is usually not desired for data rows, as the rows will expand automatically as data is entered. Use of this feature may be desired in table header rows.
 - Select **Previous Row** and **Next Row** to make additional changes desired.



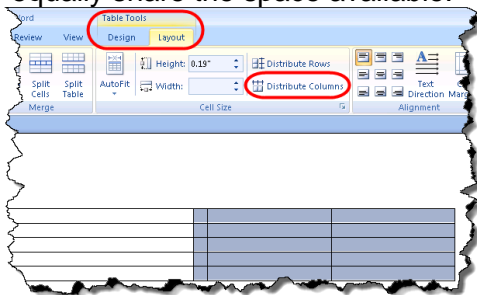
Note that the Repeat Header Rows option is also available from the Table Tools ribbon on the Layout sub-tab.



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- **Column Options** – On the *Column* tab in *Table Properties*, the *Preferred width* of the column can be set for each of the columns in the table individually. This is useful for multicolumn tables, where certain columns should be the exact same size. Use the **Previous** and **Next Column** buttons to move between the columns. Note that while this is occurring, the column being adjusted will be highlighted in the table below the Table Properties window.
- Also note that from the *Table Tools Layout* tab, you may select **Distribute Columns** to have the columns selected equally share the space available.



- The Column Width option is also available from the *Table Tools* ribbon on the *Layout* sub-tab.

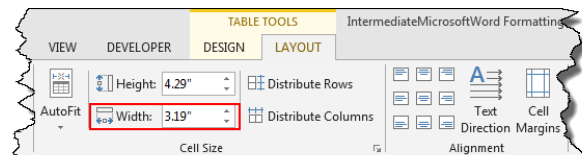
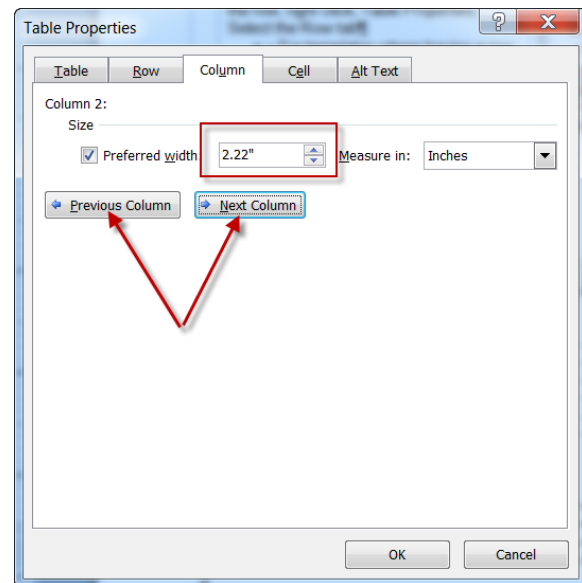
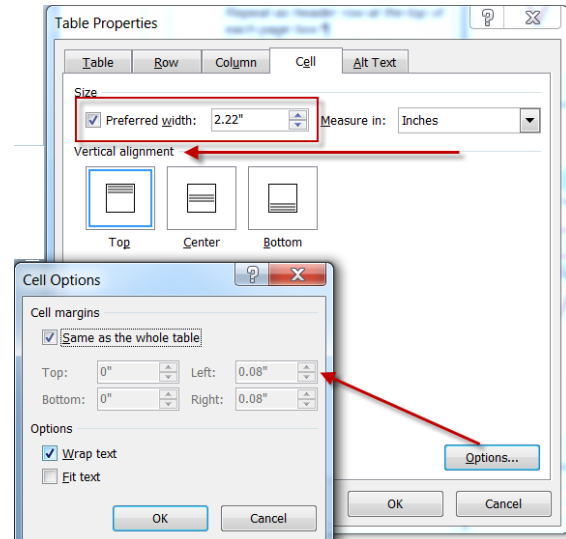


Table Properties/Cell Options

- **Cell Options** – Options available include the *Preferred width* of the cell and the *Vertical alignment* options for cells (though this is available elsewhere). **Options** opens the *Cell Options* window to control the default *Cell margins*, and the option to *Wrap text*, which is checked by default and necessary for template creation.

Note that the **Alt Text** tab of Table Properties is not used within document setup.



Additionally, choices for controlling Cell Options can be found within the *Table Tools Layout* tab in both the *Cell Size* and *Alignment* sub-tabs.

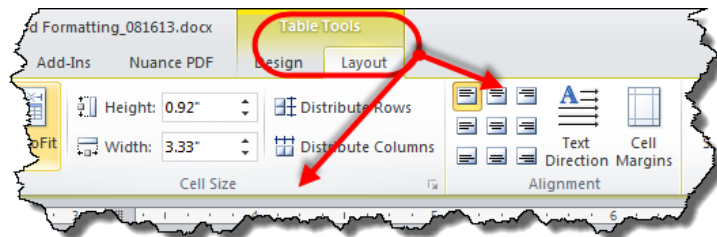


Table Uses

- The obvious reason to use tables in templates is to **align data**, and not have things shift around if one of the fields is not completed on the application. The old format – aligning data by separating it with tab stops – caused this sort of issue.
- Tables can be used with borders turned ON or OFF.** Or some rows, columns, or cells may have only certain borders turned on. A great use of this is a signature line, where a three-column, two-row table could be created. Turn all borders off, turn on the bottom border for columns one and three on the top row, and use the bottom cells to enter labels for what is desired in the field.

An example of a table created for a signature is below:

Signature		Date

And the resulting print will display as:

Signature

Date

- Table borders turned off** on merged documents can be difficult for staff to see if they do not have the **View Gridlines** option checked on the *Table Tools Layout* sub-tab. Once checked, the table borders, by default, should be visible for assistance in knowing where to click to edit data that has merged. Many of the other options already discussed are also available from this ribbon.

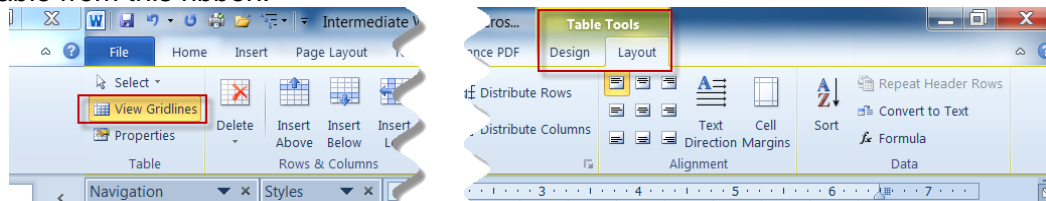
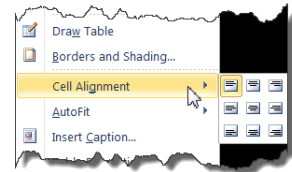


Table Tips

- Once a table has been created, it can be **copied and pasted** within the same or to other documents without issue. Sections of the table can be copied as well.
- Alignment of text** within rows can be done using the font alignment tool for left, right, center and justification within a table cell. Alternatively, after right-clicking on the table, row, column or selected cells, right-click and select *Cell Alignment*, which will also allow for vertical alignment choices.

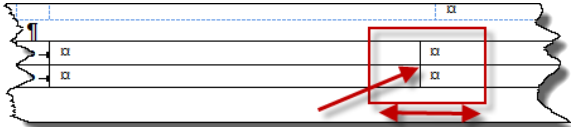


Additionally, choices for controlling Cell Options can be found within the *Table Tools Layout* tab in both the *Cell Size* and *Alignment* sub-tabs.

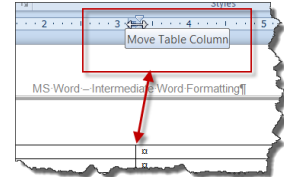
- With any portion of any table selected, the *Table Tools* command tab will display. There are many useful options available on the *Design* and *Layout* sub-tab ribbons.
- If using tables to **align data for schedule fields**, it is suggested to create a two- (or three- if using any summing formulas) row table first, create the header labels in the top row, and data fields in the second. Do an initial test before adding the replicate commands to see if the size of the columns is correct for the data being pulled, and adjust column widths before separating the rows. Next add the Replicate commands below the table, and cut sections of the table to paste within the replicates. This makes lining up the header row with the data row much easier.
- If the ***Split Table*** option is chosen from the *Table Tools Layout* sub-tab ribbon, be aware that the paragraph style of the resulting character is always Normal, and needs to be changed to a style in use within your templates. Note that both Paragraph and Table Styles are covered in depth in a separate class.
- Inserting, deleting or copying and pasting of rows and columns** within tables are easily accomplished by selecting, right-clicking, and choosing the appropriate option from the menu.

- **Adjusting Column Widths** can be done in two ways, depending on the desired result.

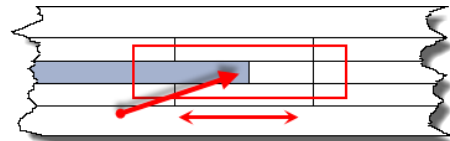
To adjust without changing the overall size of the table, use the cursor to select the border within the table, click and slide it to the desired location. Note that this can be done on a single cell with that cell selected rather than the entire column.



To adjust and move the cell border and the entire size of the table, use the cursor and select the table marking in the ruler at the top of the page (with View / Ruler turned on) and move to the desired location. The outside border of the table will move in the same direction without affecting the other columns to the right.



Also note that if you wish to adjust a single cell within a row, select the entire cell and use the adjustment methods shown above.



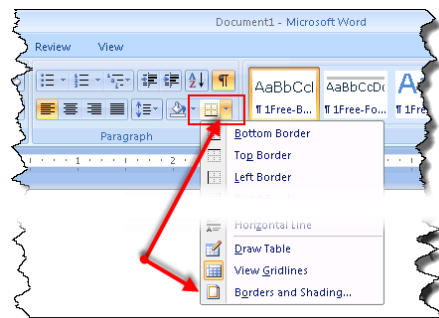
Borders and Shading

The ability to add defining lines and colors or shading to proposal or document templates is one of the tools available for making the output from your templates unique to your agency. Following is a review of the options available from the Borders and Shading menu when working with Tables and/or Styles (discussed more in depth in a separate class).

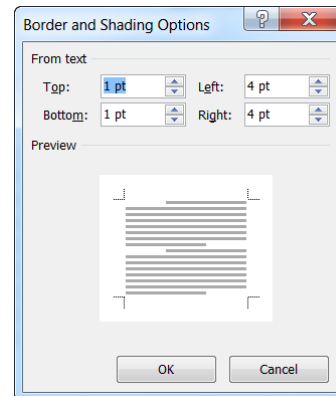
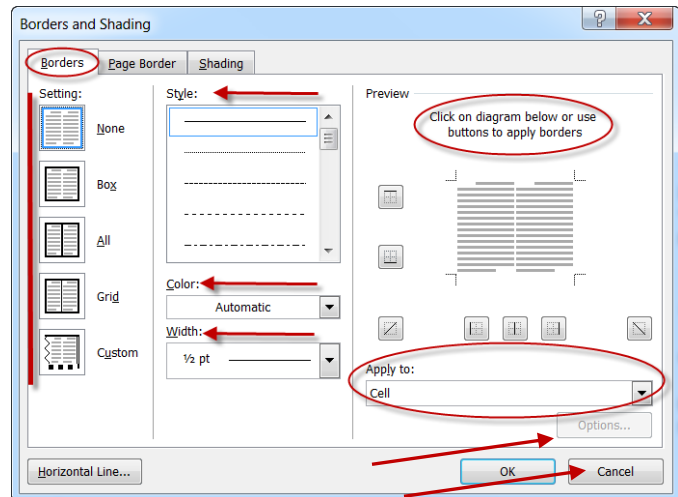
Options for Borders and Shading

With some portion or the entire table selected, right-click and select **Borders and Shading** from the options shown.

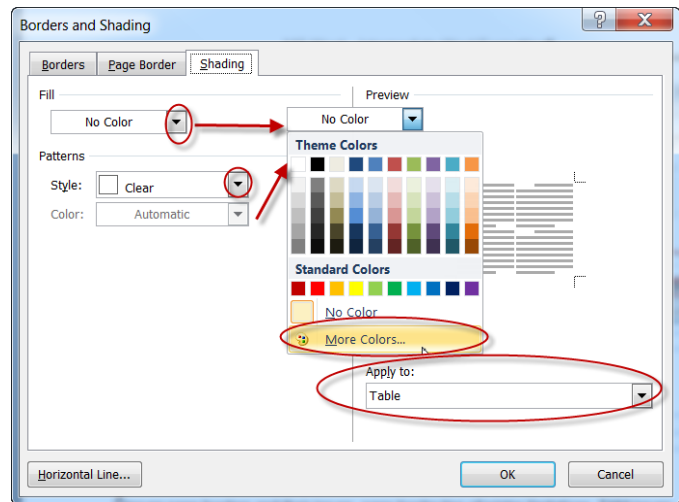
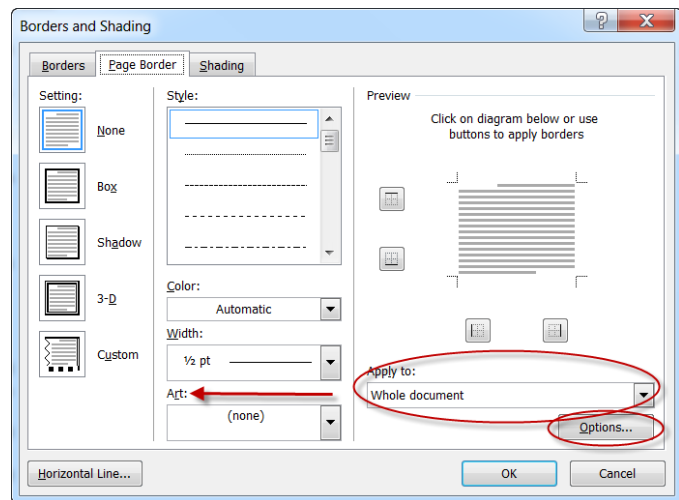
Optionally, you may choose the *drop-down arrow* on the **Borders** icon in the *Paragraph* sub-tab of the *Home* ribbon, and scroll to the bottom to select **Borders and Shading**.



- **Borders Tab** – this area selects borders to be used on the table cells and paragraph style, including:
 - **Setting:** Provides options to select *None*, *Box* around a section of cells or the outside of the table, *All* borders (for all the same lines), *Grid* (allowing a different setup for outside versus inside borders) and *Custom* (where individual borders can be applied in the *Preview* area).
 - **Style** allows for selection of the type of line desired from the options in the window.
 - **Color** allows for selection of a color, including the option to choose a custom color.
 - **Width** controls the line width.
 - **Preview** will display options chosen and allows for selection of individual border types with options selected at the left.
 - **Apply to** allows for the selection of Text, Table, Cell, or Paragraph.
 - **Options** allows for setting the distance of text from the borders if the default needs to be changed, with a Preview of the results.
- **Horizontal Line** allows for the selection or import of a custom horizontal border, optionally used in headers and footers.



- **Page Border** – this setup is also available from the *Page Layout* group on the *Home* command tab, **Page Borders**.
 - *Setting, Style, Color, Width, Preview* and *Horizontal Line* are the same options discussed above.
 - *Art* – choose from the drop-down menu for graphics to use as page borders instead of lines.
 - *Apply to* allows selections of *Whole document, This section, This section – First page only, This section – All except first page*.
- **Shading:**
 - *Fill*, if changed from No Color, opens the color options window with the option to add **More Colors** using custom RGB numbers.
 - *Patterns, Style*. Choose a percentage of fill or a pattern from the drop-down list. Once a selection is made (other than clear), then the *Color* choices become available with the same options as *Fill*.
 - *Preview* will display selections made.
 - *Apply to* allows for the choices of *Table, Text, Paragraph* or *Cell*. To apply color to a header row, simply select the entire row and choose the *Cell* option.



Tips for Borders and Shading

- **Page Borders:**
 - Use discretion with Page Borders. Often the default page border settings will extend beyond the ability of many printers to print the full border. This will also cause a cautionary warning to the end user that can stop the print from completing until the confirmation is given.
 - Testing on Applied Epic confirms that page borders do work properly.
- **Shading:**
 - All of the options for shading can be used when creating Paragraph styles (covered in another class) for application to text and paragraphs outside of tables.
 - When selecting Colors or Patterns, be cautious of the effect if the document is printed to PDF or another program, such as fax@vantage®. Patterns with too much density may obscure any text contained in the cells, especially when printed to black and white.
 - Always be certain to test any choices for borders and shading with multiple printers and in multiple situations to be certain the results are acceptable for distribution to customers and prospects by their preferred method.

Section Breaks

Section breaks in documents allow for the changing of page formatting, page layout, margins, headers and footers, and number of columns in different sections of the same long document. The Applied Word interface automatically inserts section breaks between the templates in a proposal group; however, the end user can decide to suppress such breaks when merging the proposal.

Options for Section Breaks

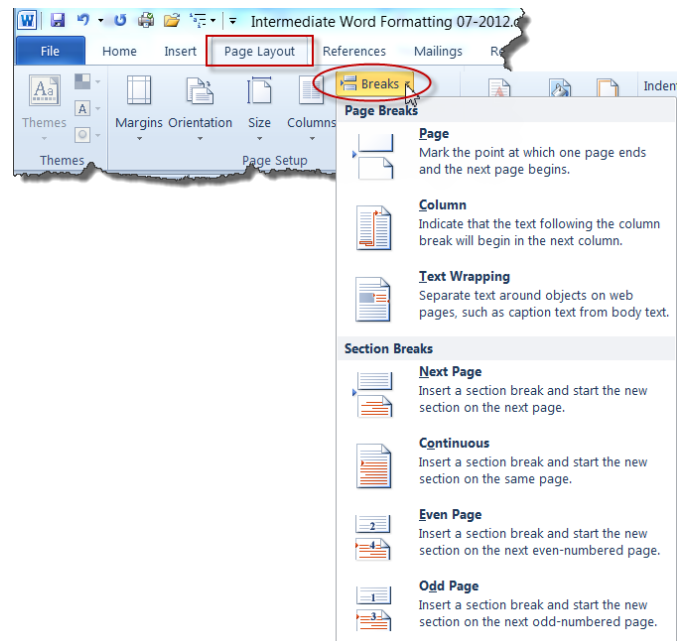
From the *Page Layout* command tab, select **Breaks** from the *Page Setup* group and the drop-down box will display. Note that items listed below with an * are the primary types typically used in document and proposal templates.

- **Page Breaks:**

- **Page*** – ends one page and begins another.
- **Column** – text following will begin in the next column. This choice is used in combination with section breaks.
- **Text Wrapping** – separate text around objects on web pages

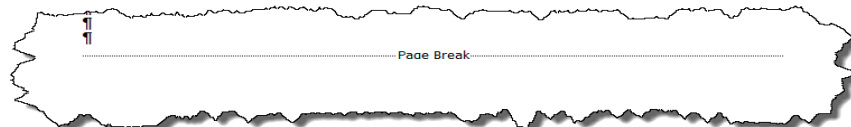
- **Section Breaks:**

- **Next Page*** – the break causes a new page to start, so layout and formatting options can be changed and separated from prior pages.
- **Continuous*** – same as above, except there is no change in page layout. Margins and columns could be used in the separate section.
- **Even Page** – used for inserting a section break where the next page will start on the next even-numbered page.
- **Odd Page** – inserts a section break where the next page will start on the next odd-numbered page.

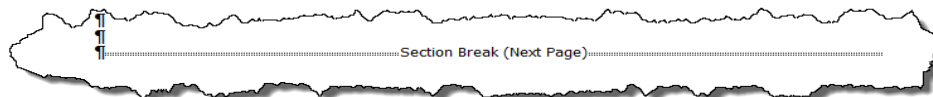


Tips for Section Breaks

- **Page breaks** can and should be used in document and proposal templates where data should begin on a new page. An example would be on the Umbrella page of the proposal, add a page break so that the underlying coverage section always starts with a new page. Formatting options typically remain the same, other than individually placed headers or footers on proposal templates.



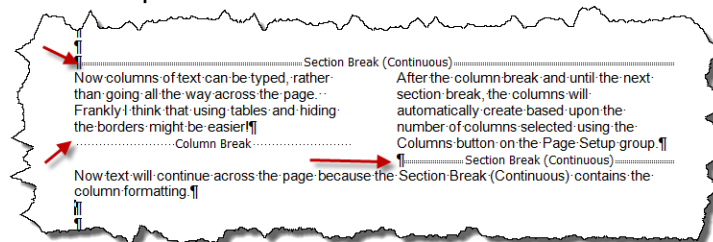
- **Section Break (Next Page)** – Used if different page formatting is needed. As an example, perhaps there is one page within a three-page template where the middle page needs to be turned to landscape mode instead of portrait, or a header that is applied to the entire document needs to quit appearing. Insert the next page section break and change the formatting, confirming that the changes apply to the current section only. Repeat the process to return to original page layout and format if needed.



- **Section Break (Continuous)** – Similar to the next page break, formatting after the section break can change, though some page formatting options will not be available as the page continues. These breaks are often used in combination with adding columns to a document. In the sample, note that the paragraph markers continue directly after the break.



- **Section break in combination with column break** might look something like the sample below. Typically this is not seen in document or proposal templates, but might be used for article writing or publication pieces.



- **A caution on Section breaks** in proposal templates. Because the Applied Word Interface automatically inserts section breaks at each change in application template, occasionally having additional section breaks in templates may cause "confusion" and some data merging will not occur as intended. If section breaks are used in your templates, confirm with testing that your desired result is retained upon completion of a full proposal merge.

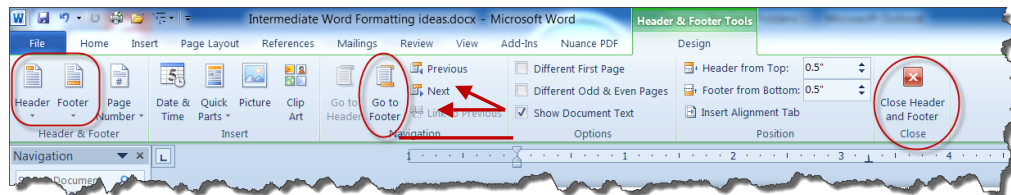
Page Headers and Footers

Page headers and footers are useful, particularly for long documents. Page titles, insured name, policy information, creation or presentation date, page numbering, disclaimers, or a section for initialing acceptance by the client are all great items to include. A table can be inserted into either the header or footer to help align data that you wish to insert. Optionally, images could be inserted into headers or footers to draw interest to the subject of the page.

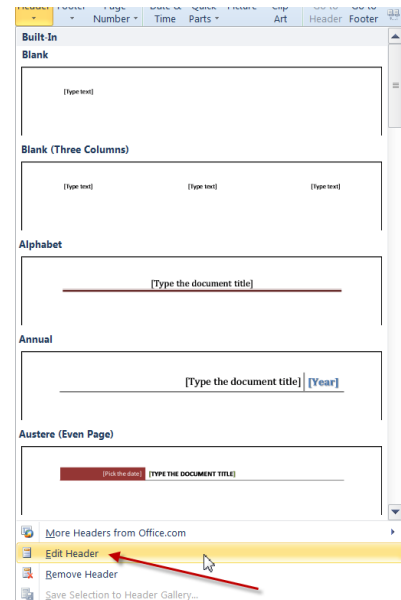
Options for Page Headers and Footers

As usual, there is more than one way to insert headers and footers. From the *Insert* command tab, select the **Header** or **Footer** in the *Header & Footer* group on the ribbon and drop-down options appear. Alternatively, double-clicking in the header or footer area of the page will open the *Header & Footer Tools Design* command tab, with the same options available on the ribbon. To view the command tab, the header or footer must be open on the document.

- Options available on the *Header & Footer Tools Design* ribbon are shown below. Note that to close out of the header or footer at any time, use the **Close Header and Footer** option in the ribbon, or simply double-click within the document page outside the header or footer.



- Header or Footer:**
 - Select one of the Built-In styles from the drop-down selection or select **Edit Header / Footer** to create your own.
 - Once within the header or footer, use the options for page numbering, date and time or other tools available on the ribbon.
 - Format desired font and size, also using borders and shading if desired.
 - Use the options on the *Navigation* group to move to the footer or header, or the next as needed.
 - Note that if this is a multipage document and there is a section break included, the *Link to Previous* option on the *Navigation* group will be available to select to **Unlink** from the prior page, and change the header or the footer for the next section of the document.
 - Review the other options available and close when complete.



Tips for Page Headers and Footers

- If including photos or logos in headers or footers, a helpful way to align them is to set up a table and insert the picture there. Images can also be anchored to certain places on the document, and sent behind other text.
- Because headers and footers carry forward (from the first page to subsequent pages), there are different opinions on how to set them up. You basically have two options:

Option A: Create a header and footer on every document. To stop the header/footer from the previous page repeating, there must be a header/footer in each template, even if all that is in the header/footer is spaces.

Option B: Create a header and footer on one document to be carried forward. See Appendix B for instructions.

Having a header and footer set from the first page of your proposal set can have some advantages, but there are pros and cons to each approach. Decide which setup option works best for your proposal.

Option A

Pros	Cons
Individual pages can have unique headers and footers, or none, as desired.	Each template in your set will need headers and footers added individually.
Headers and footers will repeat for “multipage templates” when data merged carries onto an additional page (e.g., page titles).	If something needs to be corrected in a header or footer for a merged proposal, the end user must correct it on each page of the merged document.

Option B

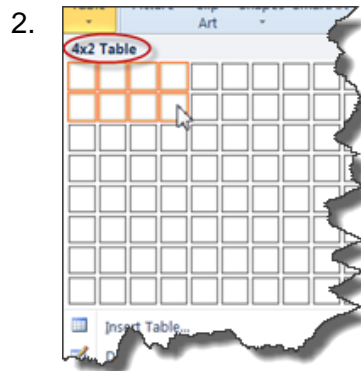
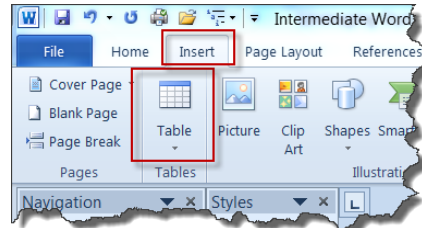
Pros	Cons
Template Setup is easier. Set it up one time and all other templates need no header or footer.	All proposals merged must ALWAYS have the page with the Header and Footer setting included (typically the Cover page). Any pages merged individually will not have any header or footer.
If something needs to be corrected in a header or footer for a merged proposal, the end user can change it one time and all pages are corrected.	

The decision for each agency will depend on the look of your templates, if there are any unique pages with separate headers and footers, and what your typical workflow is for creating your proposals through your system.

Appendices

Appendix A – Inserting Tables – Step by Step

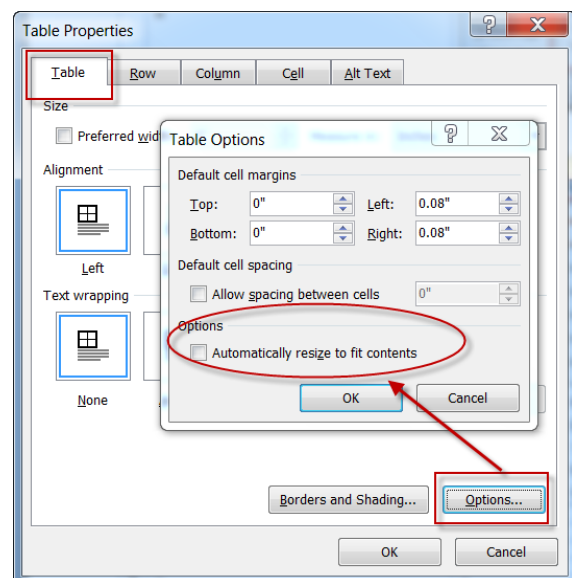
1. From the *Insert* command tab, select **Table** from the *Tables* group on the ribbon.



From the *Insert Table* drop-down menu, select the number of rows and columns desired for the table. Note that as the rows and columns are selected, the details appear at the top of the window, and the table preview will appear within the document. Click on the lower-right cell when complete to add the table to the document.

3. Select the entire table just created, right-click and select **Table Properties**.
 - From the Table tab, select **Options**.
 - Uncheck the Options box to eliminate the *Automatically resize to fit contents* feature.
 - **OK** to Table Options.
 - **OK** to Table Properties.

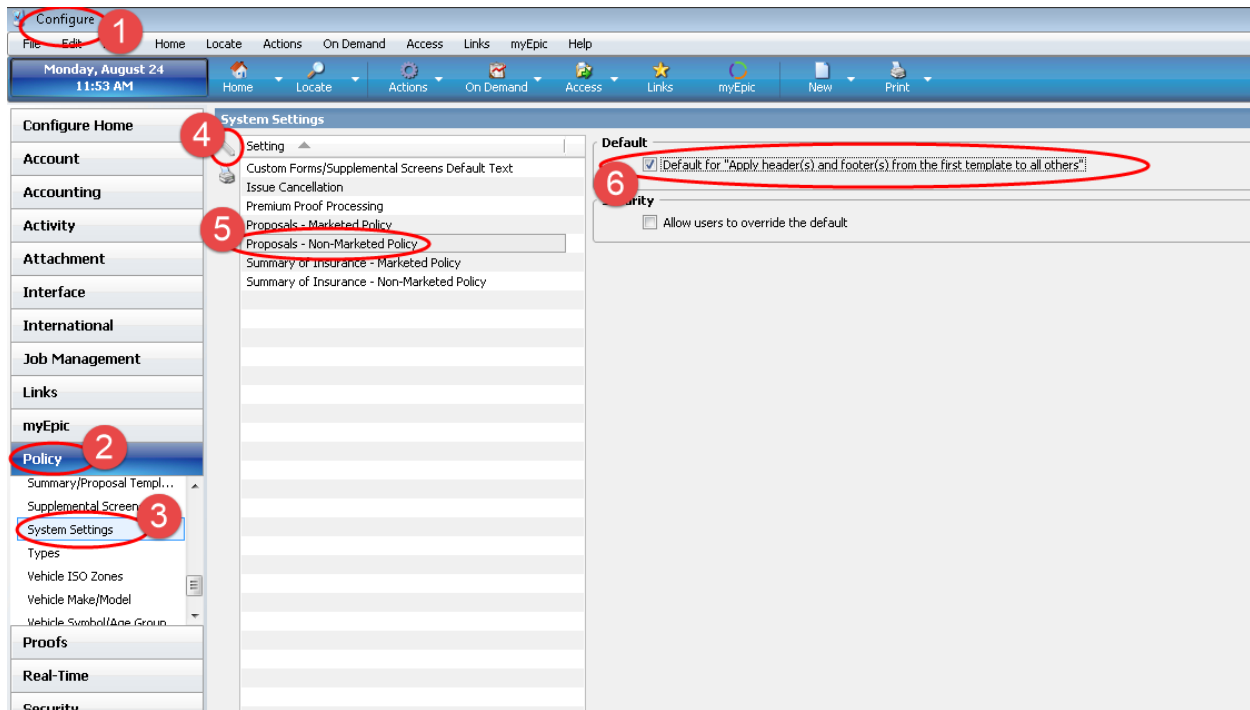
Note: Optionally, you may select the table, right-click, select *Auto Fit*, and *Fixed Column Width* to accomplish the same result.



4. Format any additional options needed for this table depending on your needs.

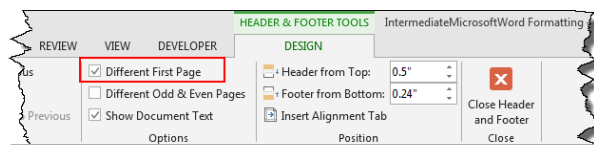
Appendix B - Default Headers and Footers from First Template

There is the option of “defaulting headers and footers from first template” in your merged proposal. This works when you want the same headers and footers to appear throughout your proposal, with the exception of the cover page. The screen shot below depicts the steps needed to set this up in Applied Epic. Repeat step 6 for Proposals – Marketed Policy as needed.



In order for this feature to work, you will want to create your headers and footers within your cover page. You will do this using the Different First Page feature within your template document. Options for how this function is reached are shown below.

- Access within the *Header & Footer Tools Design* tab and use the checkbox for ***Different First Page***.

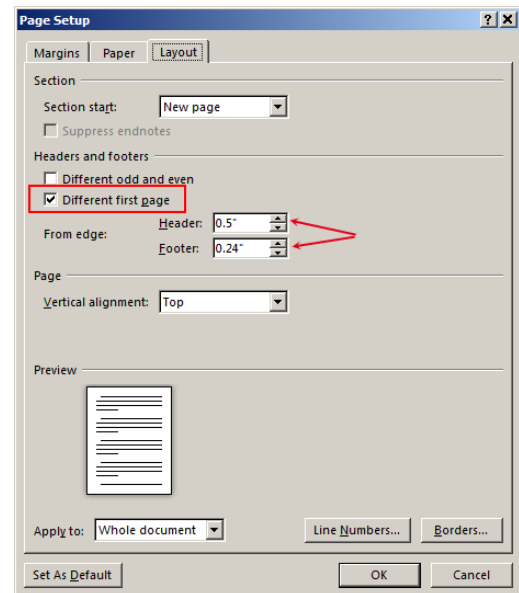


SESSION HANDOUT

Microsoft® Word – Intermediate Word Formatting – Applied Epic



- Optionally, ***Different first page*** can be selected from the *Layout* Tab on the *Page Setup* window accessed through the *Page Layout* ribbon, ***Margins, Custom Margins***.



Once you have selected the different first page option, insert a page break at the bottom of your cover page. Next, create headers and footers for page 1 (actual cover page) and page 2 (blank page). The headers and footers created on page 2 will follow on to all proposal pages when merged at the client. Last, delete the page break.

Appendix C - Other Classes and Handouts from the Proposal Track Series

- Proposals and the Power of Graphic Design – This class also includes information on a Style Guide you may find useful for your design specifications.
- Microsoft® Word – Introduction to the Applied Epic Interface – Install Free Set – Includes instructions for downloading and installing templates.
- Intermediate Microsoft® Word Formatting – Applied Epic – includes Tables, Borders & Shading, Section Breaks, headers & footers, etc.
- Leveraging Microsoft® Word Styles – Applied Epic
- Applied Epic/Microsoft® Word – IF, ASK, Math, SET, Bookmarks, INCLUDETEXT
- Applied Epic/Microsoft® Word – Formatting Numbers, Text & Dates
- Applied Epic Proposal Workshop / Advanced Clinic – This session has no handouts and will be based upon questions and issues brought to the group by the attendees.