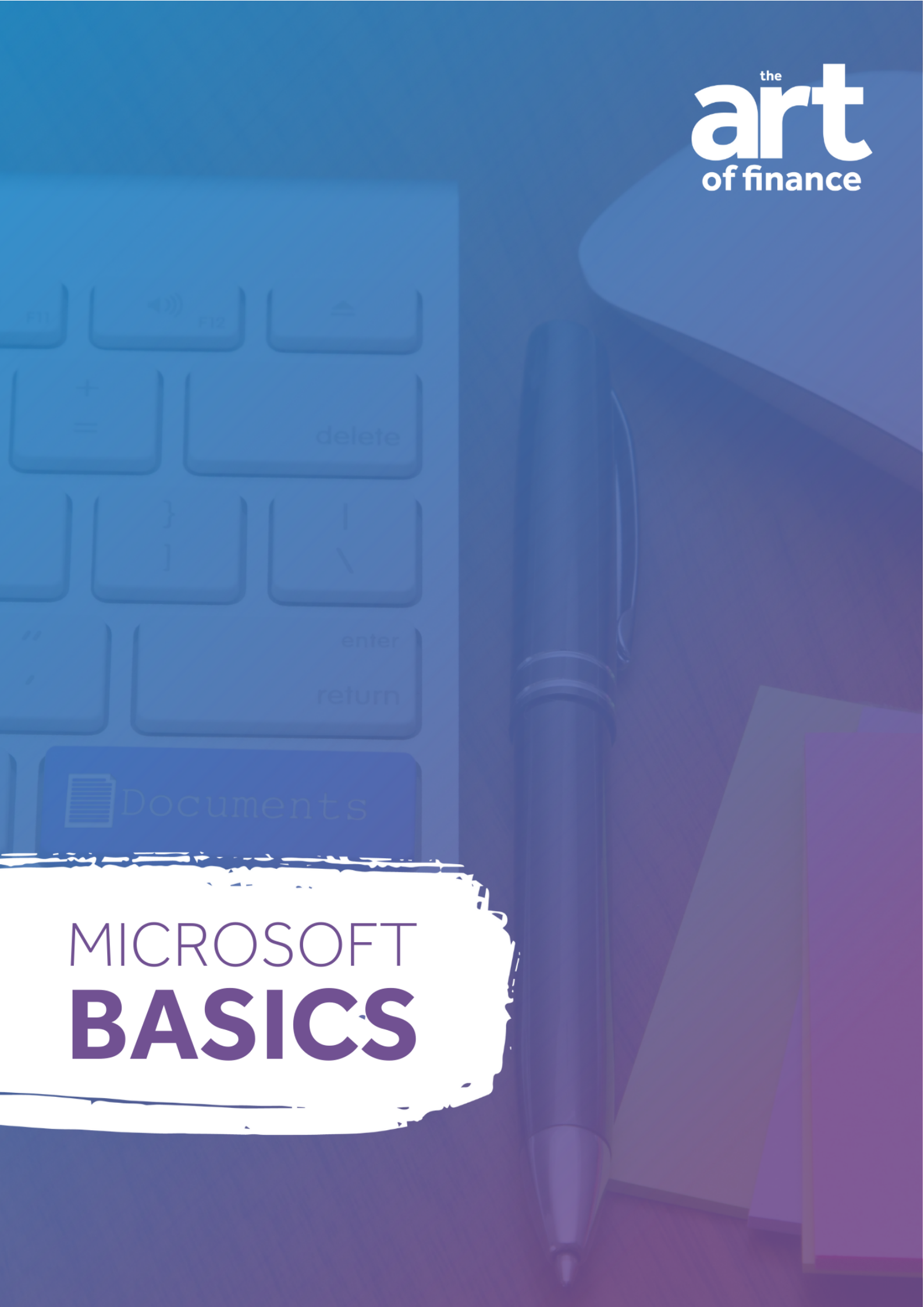
the art of finance



MICROSOFT BASICS

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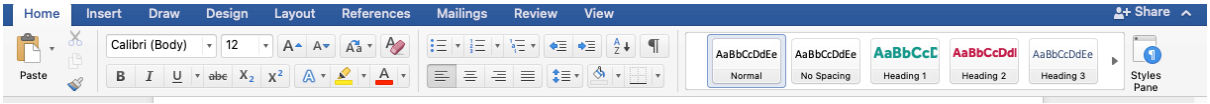
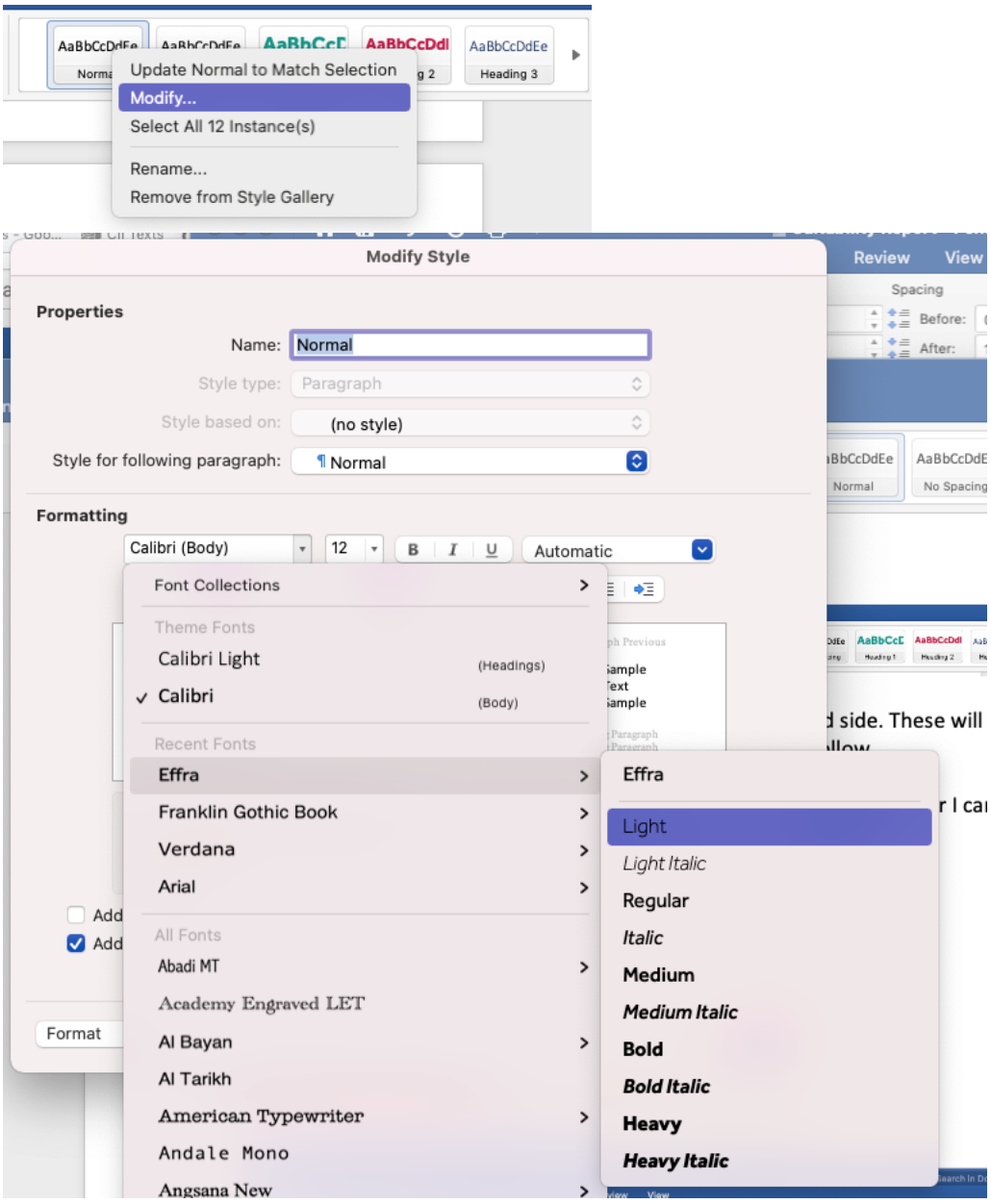
Formatting documents.



The templates for the advisers should already be formatted but we'll explain how you can format a word document.

Go on Home tab at the top and go to the styles on the right-hand side. These styles will ensure that your document is following a formatting that you're wanting to use.

If I click right click on Normal, I can make the format match the selected text or I can modify it.



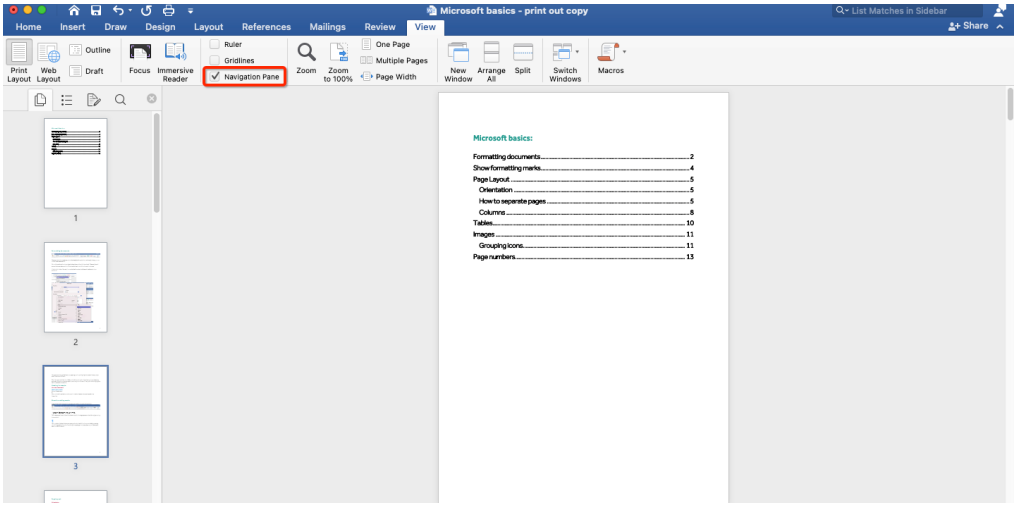
Here you can change the font, size, spacing and so on. Highlight text and click on a style and it'll change the format.

When in a report, all text should be controlled by the styles. If you're copying and pasting external information into the report, use the styles to format it. You just need to highlight a section and select the style.

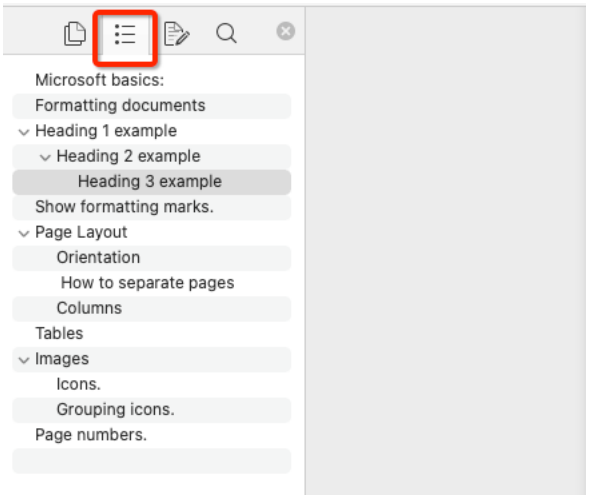
Heading 1 example
Heading 2 example
Heading 3 example
Normal / body copy.

Review.

When you've formatted your document, it makes it easier to organise and view.
If you click on view at the top of the tab, you can select for the navigation pane to show.

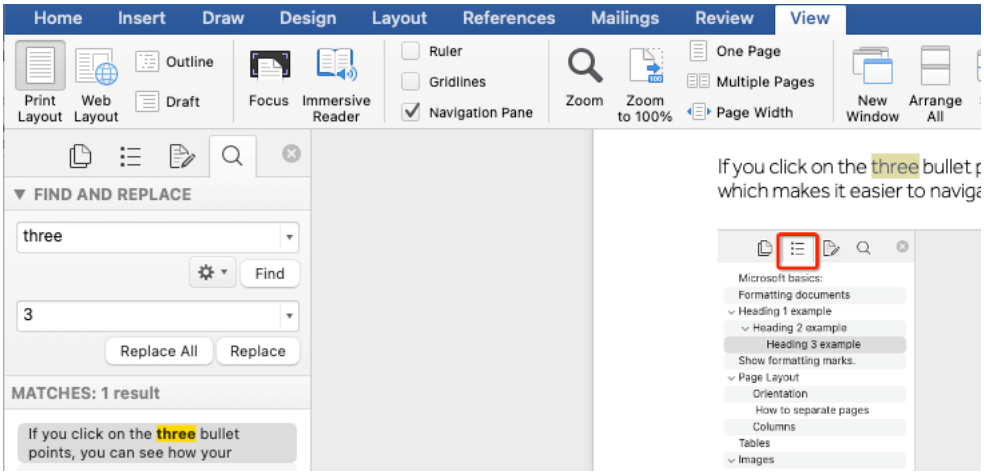


If you click on the three bullet points, you can see how your document is broken down which makes it easier to navigate.



If you click on the magnifying glass, you'll see Find and Replace. This is great if you've used the incorrect word in the report... very handy if you've spelled a client's name wrong throughout!

You can find the word you're looking for and underneath type in what you want to replace it with.



Tables of contents.

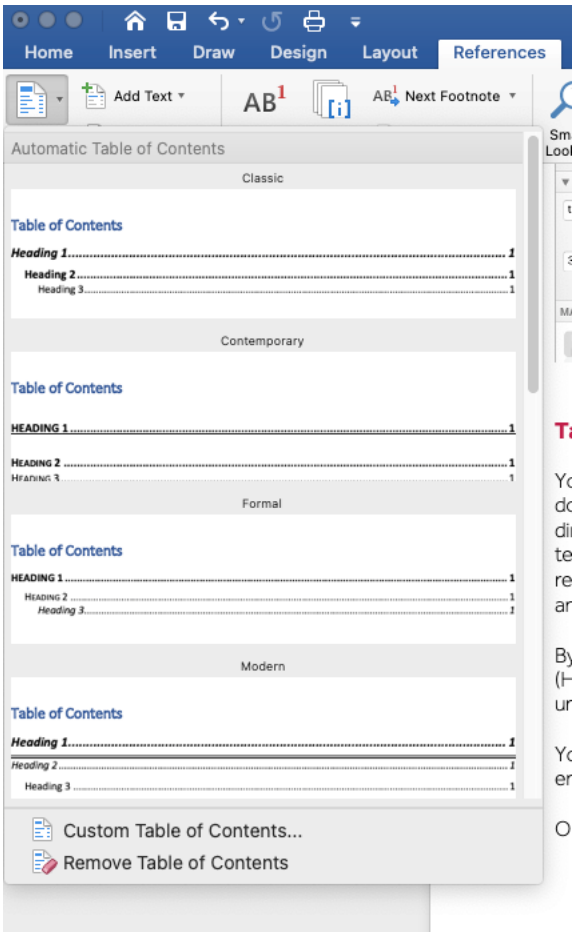
You may have noticed that there was a table of contents on the second page of this document. We hope that you're not manually building these! Using a table of contents can direct the reader to exactly where they need to be. This is very handy when it comes to technical information such as a suitability report as it gives the reader/client a chance to review sections of the report, know where they got up to, and resume back again clickly and easily.

By default, Word generates a table of contents using the first three built-in heading styles (Heading 1, Heading 2, and Heading 3). As we've mentioned, you can change these styles under the Home tab.

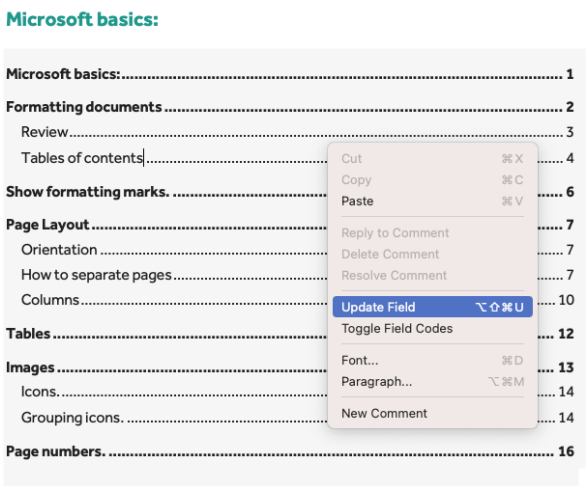
You can apply heading styles to your content as you're going through or apply them at the end when you're reviewing the document.

Once you're happy with all your headings, you can add or update the tables of contents.

If you click on the References tab, the table of contents is within there.



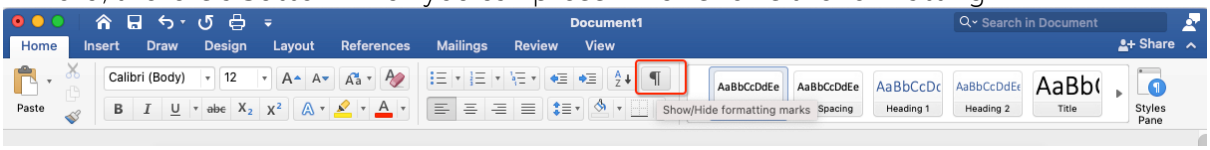
Once inserted, you can format it. It is possible to create your own formatting style for your contents page too under Customer Table of Contents.



If you've made any further changes to your document, you can update the table under References and update table or right click your contents table and click update field. You can update the whole thing or just change the page numbers.

Show formatting marks.

In word, there is a button which you can press which shows the formatting.



Space·between·words.

This means you'll see a little dot between words showing spaces created through pressing the spacebar.

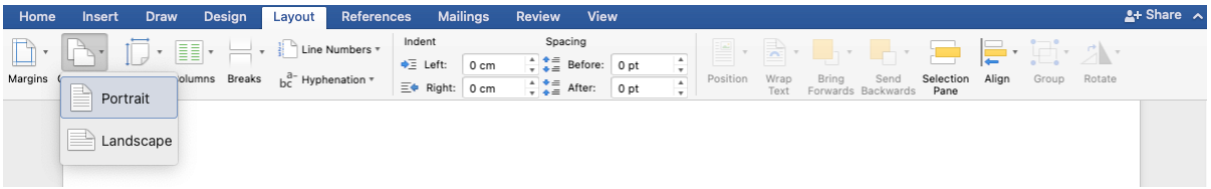
¶

This symbol will show when a new paragraph starts which has been created by pressing return. It's good to show the formatting now and again as it can show any mistakes and help you resolve issues.

Page Layout.

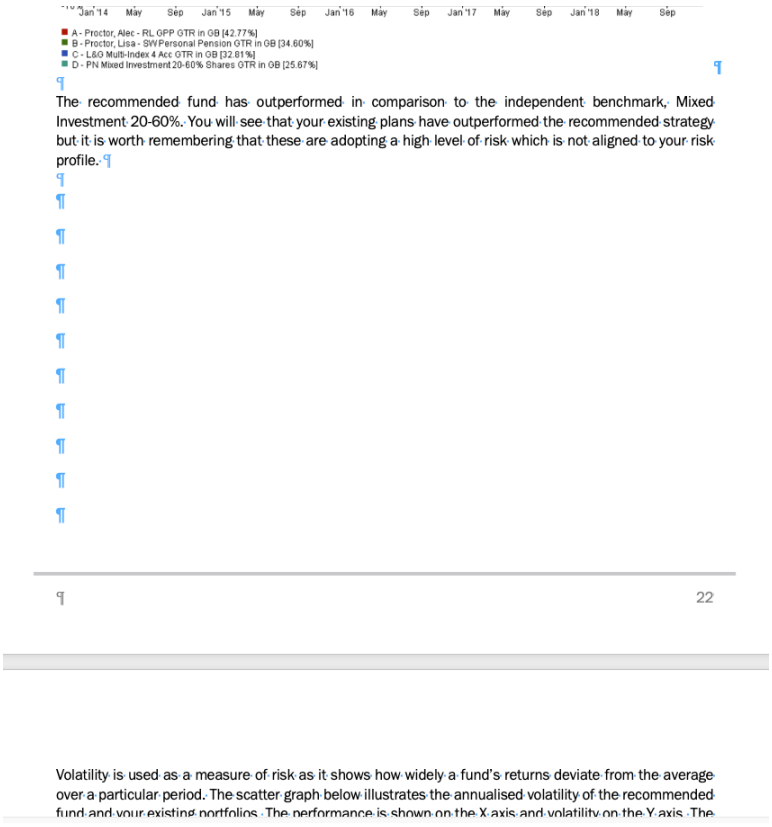
Orientation.

You can change the orientation of your document from portrait to landscape. Go on layout and then select orientation. Landscape may be a good shout if you're copying a lot of images into the document.

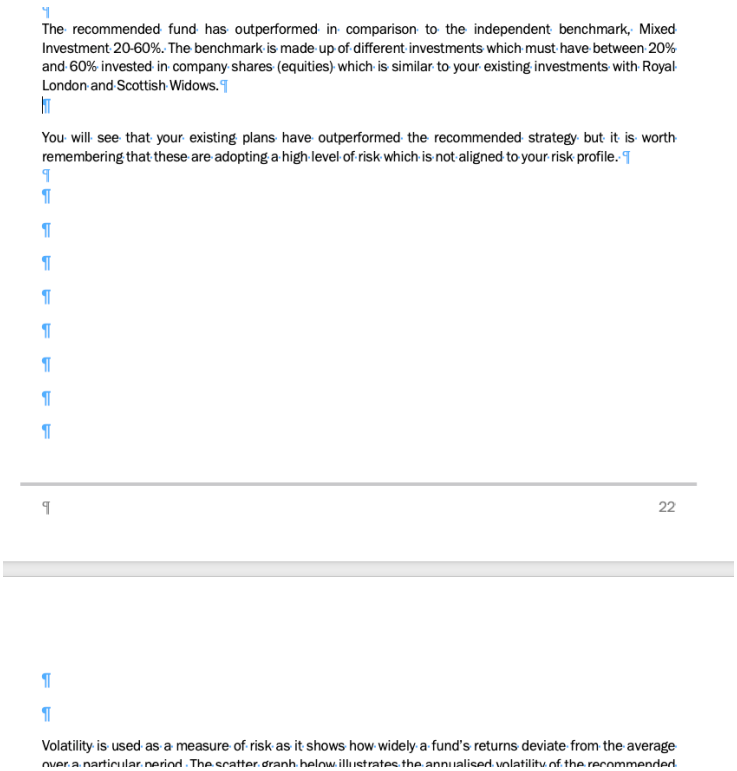


How to separate pages.

If you're wanting to create space and separate sections in a word document, spamming return / enter isn't the best way to achieve this.



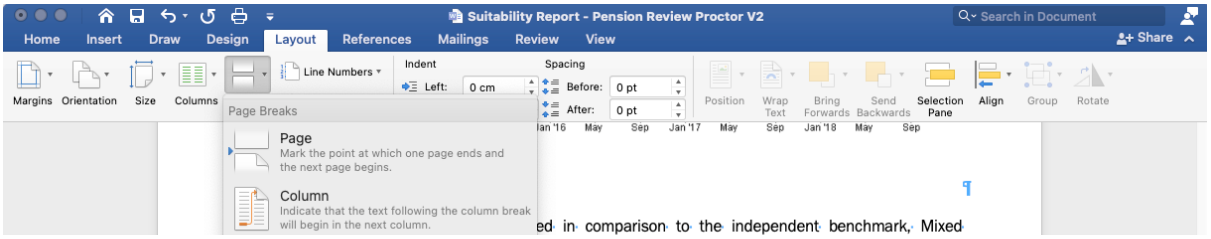
If I wanted to add anything further though, it'll mess up the formatting on the next page. If you've used return to format the whole document, then it'll mess up the next page, and the next page... you get the drift.



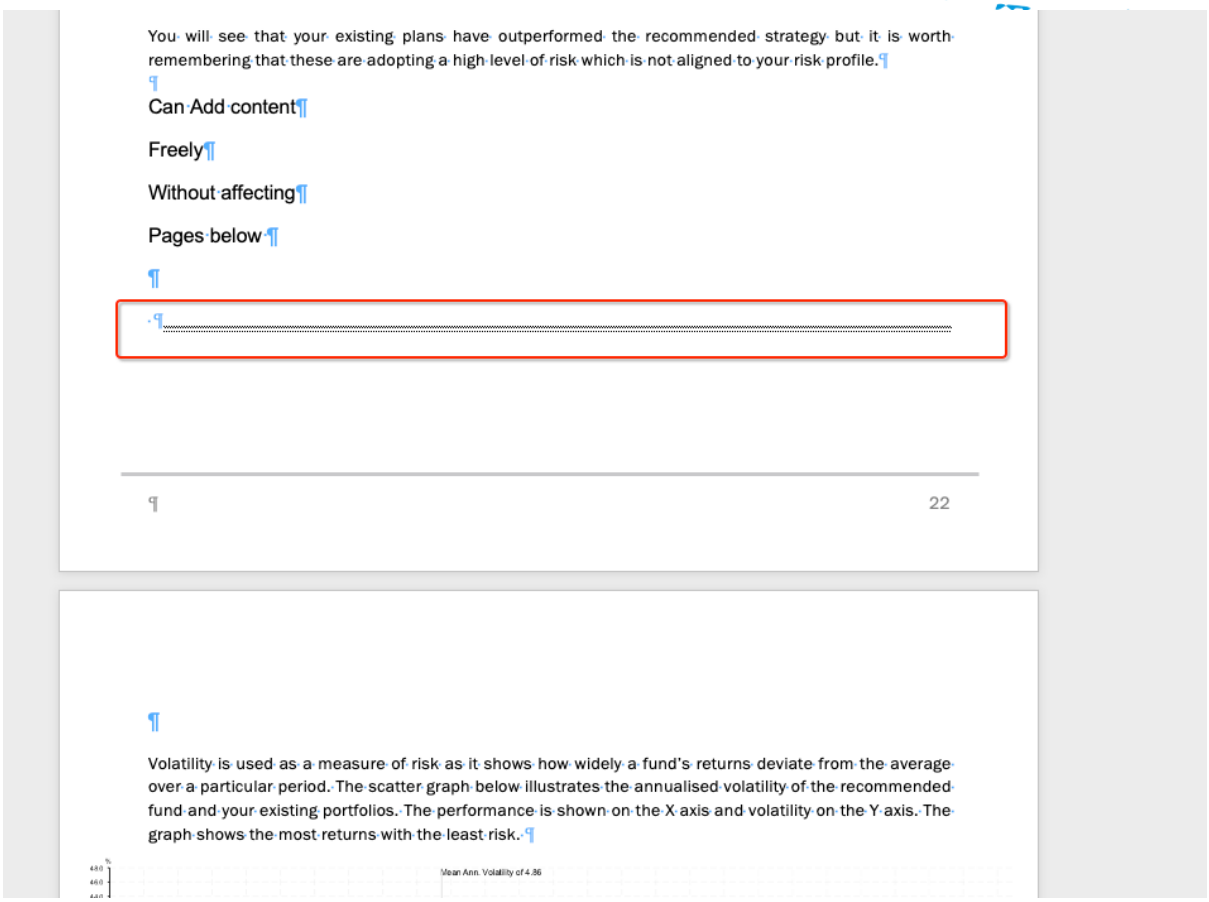
Obviously, you can go through and easily fix this but it's not efficient.

Each symbol represents a new paragraph and when you start inserting your content, it'll then drag the content down in the next page. This means you'll need to go back and delete space. Easily done but isn't the most tax efficient way.

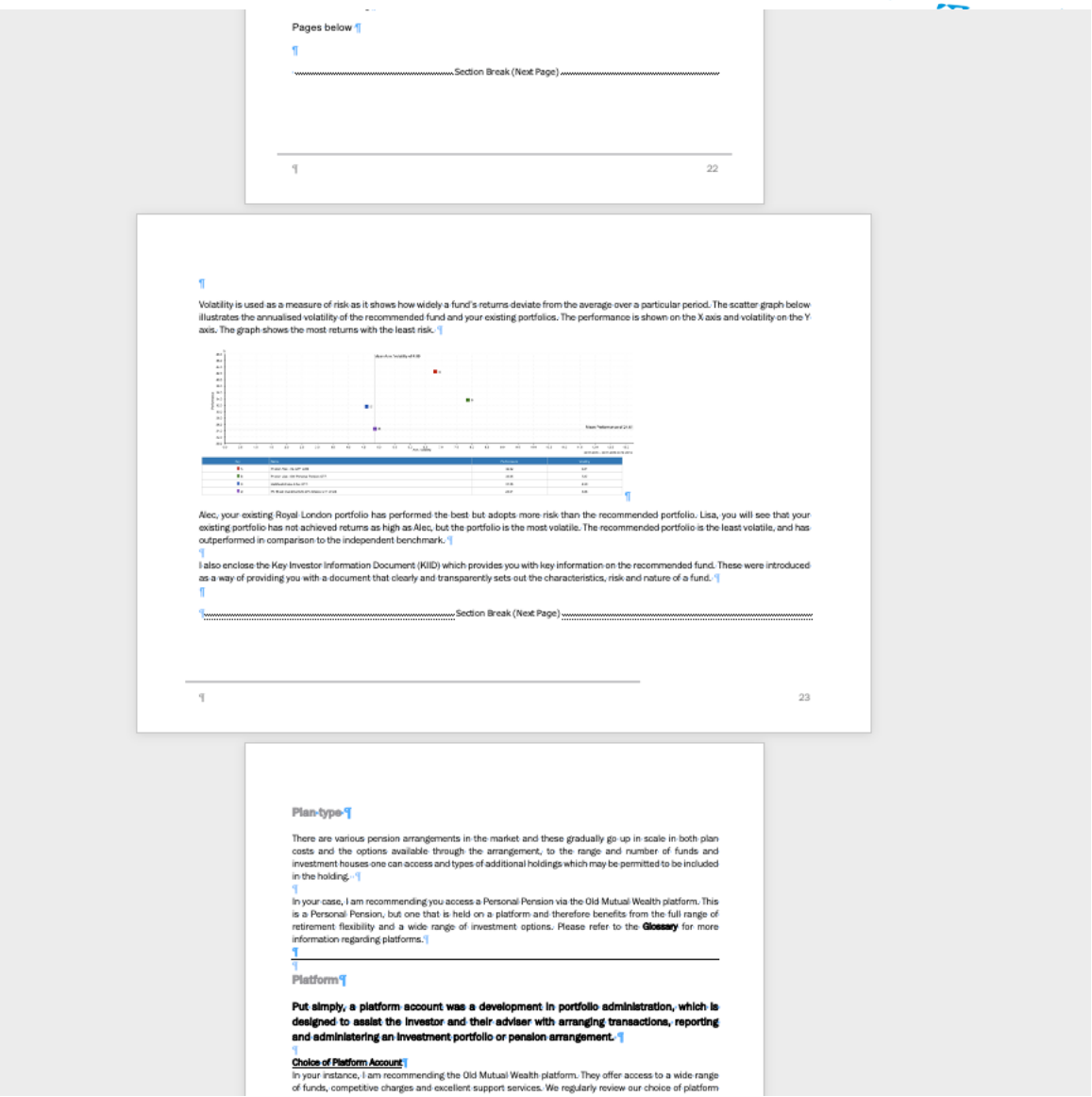
- Instead of spamming return/enter to create space, go to where you want to create space.
- Click on Layout at the top.
- Breaks.
- Page Break.



Now you can easily add content without it affecting the formatting below.
If you turn the formatting symbol on, you'll be able to see where the page break is.



You can also add a 'Section Break', This means the section of the document you're creating will be treated completely differently from the rest of the word document. This is useful if you're wanting to change the margins, landscape, anything really!



Here you can see one particular page is landscape. End the section break and the rest of the word document will follow the original formatting.

Columns.

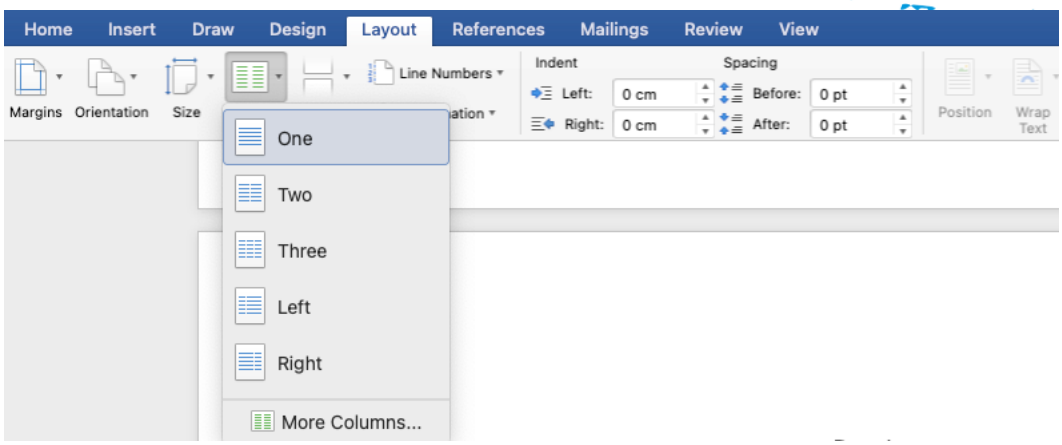
If you're wasting a lot of space, just as the bullet points below show, it may be better to organise text / images into columns.

Advantages

- Easy to understand.
- Simple and cost efficient.

Disadvantages.

- Basic features.
- Limited users.



Advantages

- Easy to understand.
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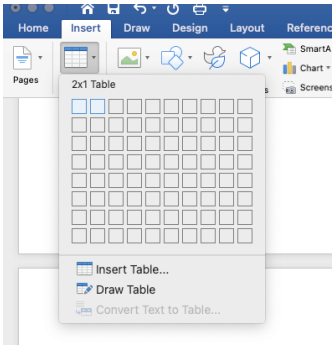
Disadvantages.

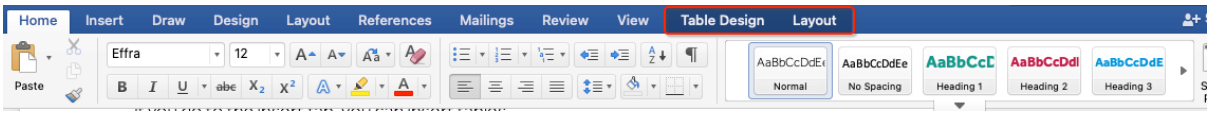
- Basic features.
- Limited users.

Tables.

If you go to the insert tab, you can insert tables.



Once you've created or clicked in a table, two new tabs should have appeared, Table Design and Layout.



In table design, you can modify and create a style, change the lines, the colours and so on.

Table	Figures
Content	£££££
Long fund name that does on for miles and miles.	£££££

You'll want to tidy up the table once you're done. The easiest way to do this is under the Layout option which appears when you're working in the table.

If you click on autofit, you can adjust the table so that your content fits in and the table is the same width.

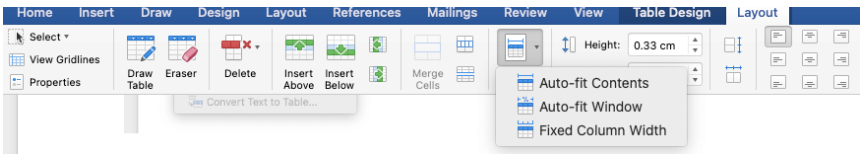
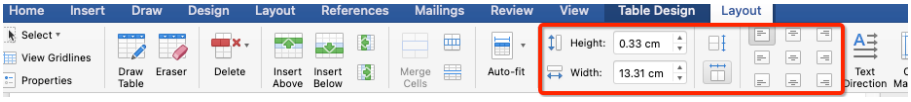


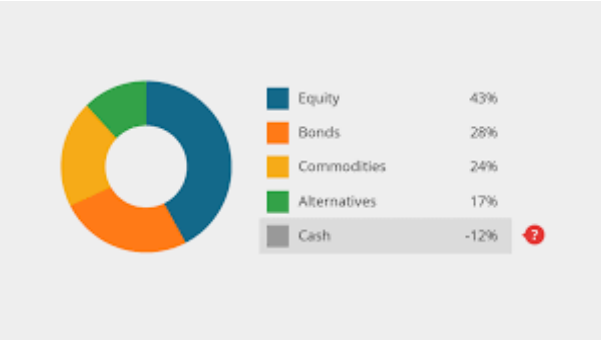
Table	Figures
Content	£££££
Long fund name that does on for miles and miles.	£££££

You can also change the height, width and alignment of text.



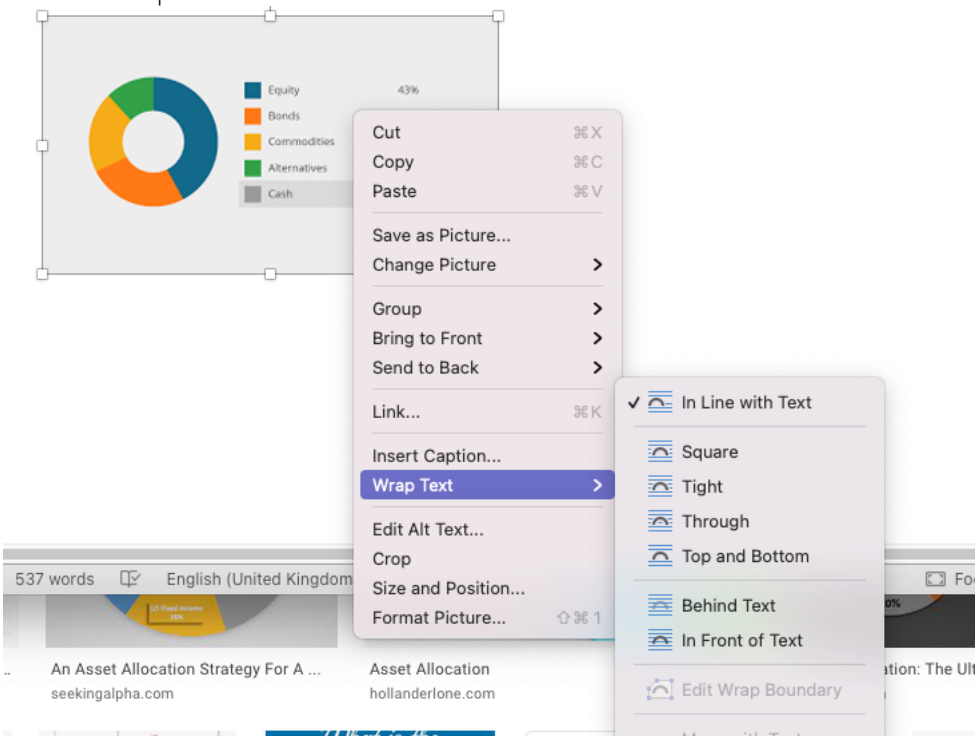
Images.

You can insert images or copy and paste them.



However, when you insert an image, it usually ruins your line spacing.

You can choose how the image interacts with the text if you right click on the image and click on wrap text.



This causes all of the text in the word document to wrap around the image so that the imaghe does not infere with the line spacing.

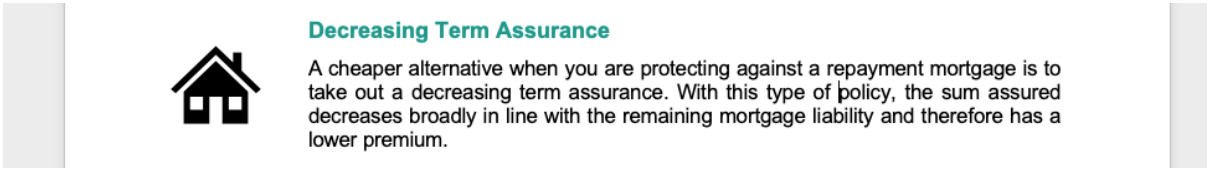
- Square
  Text wraps around the image in a square shape
- Tight/Through
  Text wraps around image, regardless of what shape the image is. This text wrap works best with images that have no background.

- Top and Bottom
  Text stops when it hits the top of the image and continues at the bottom of the image; no text is to the left or right of the image
- Behind text
  Image is behind text. Text will cover image.
- In front of text
  Image is in front of text. Text behind the image is not visible

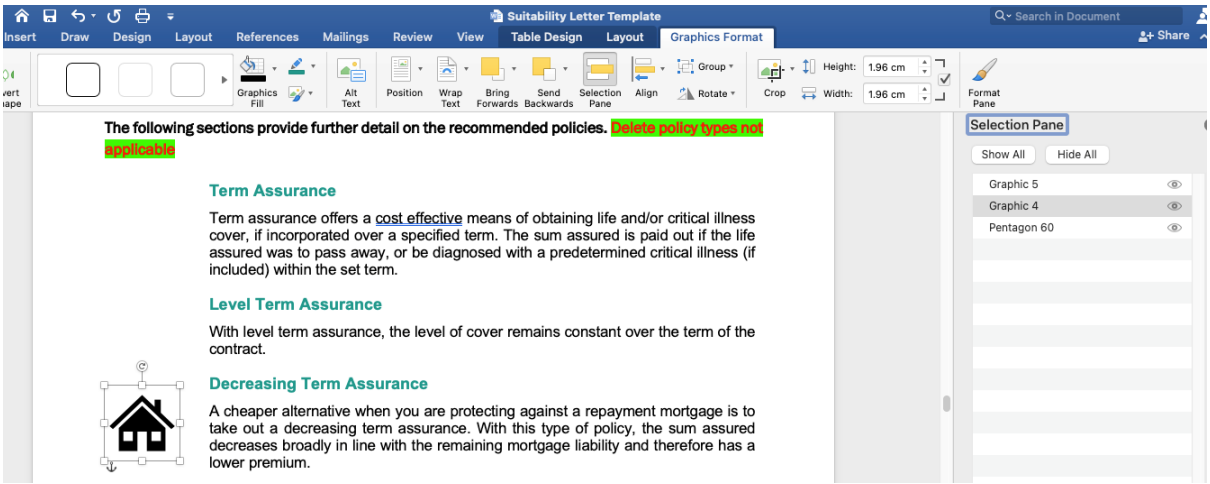
After the text wrap is applied, you can click and drag the image to anywhere in the document, and the text will wrap around it accordingly.

Icons.

You can include icons in a word document to spruce it up a bit.



When you click on the icon, a new tab should have appeared at the top called Graphics Format.

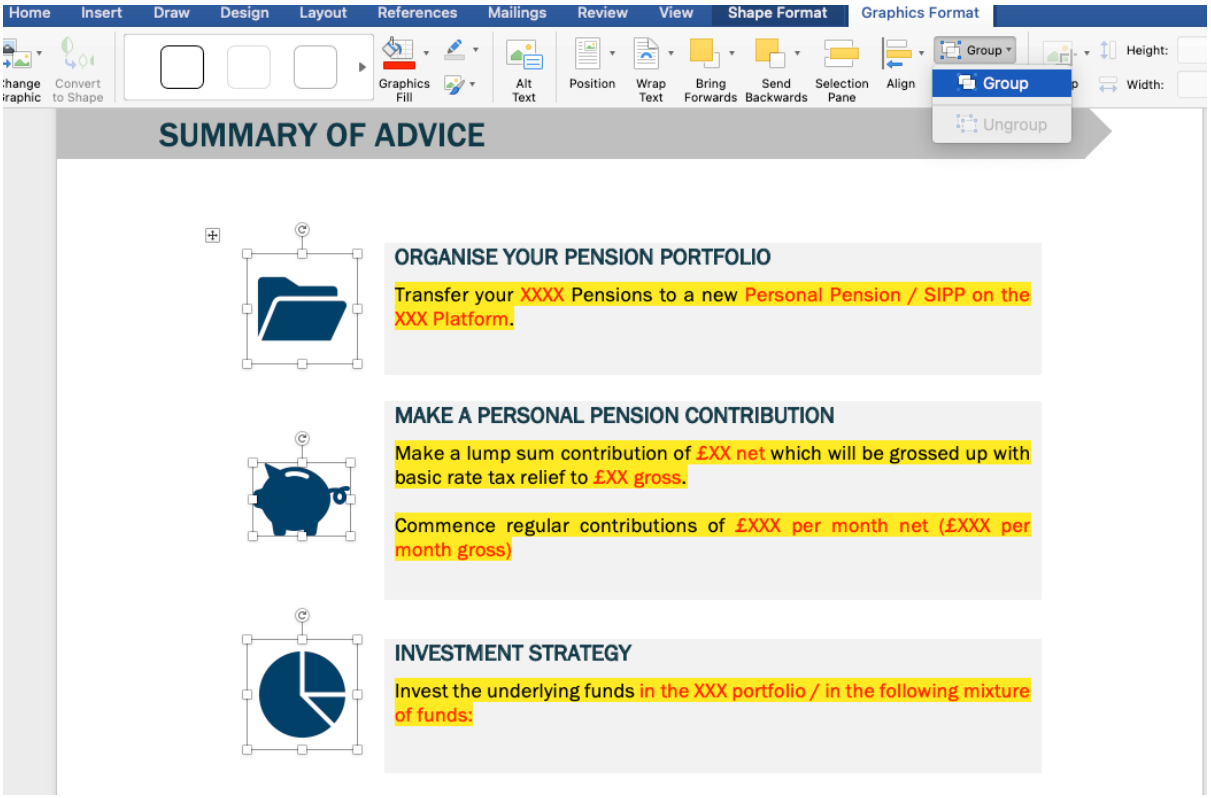


If you click on Selection Pane, you'll see all the graphics on the page. You can click on the graphic on the page or in the selection pane and click on Graphics Fill to change the colour of the icon.

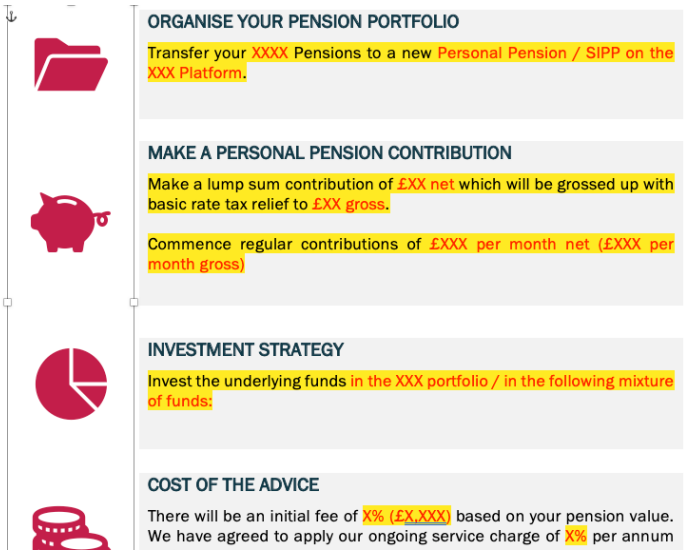
Grouping icons.

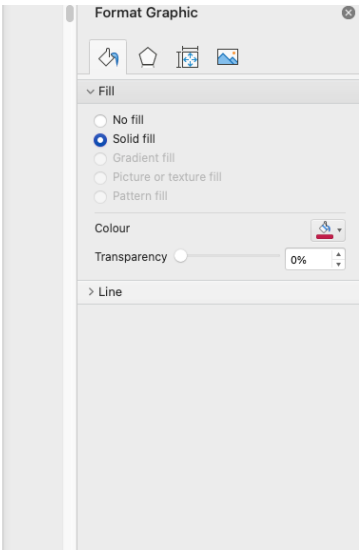
If you have more than one icon, you can group them together. That means it'll save you changing colours of every single one!

If you click on an icon and command + click on another icon, press command + click on another icon until you've selected all the icons you're wanting to group.... Under graphics format, click Group.



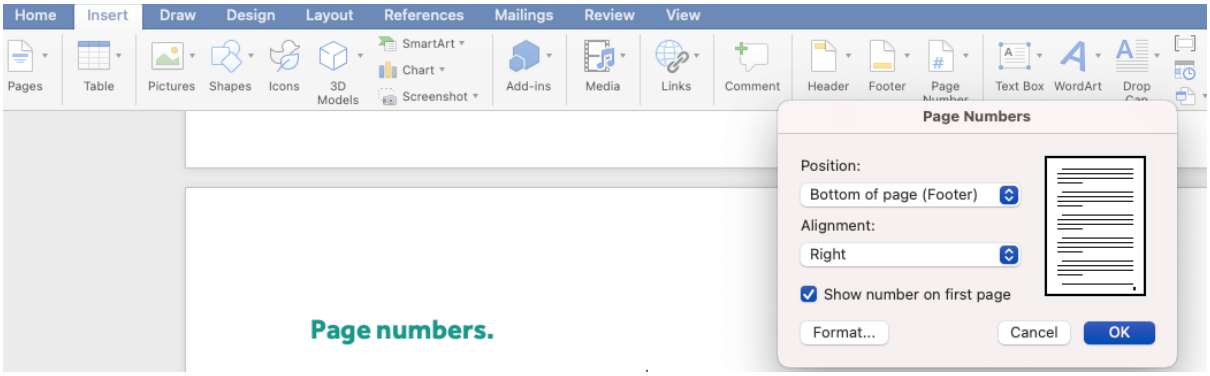
Then when you click on the grouped images, format graphic, solid fill, you can change the colour of all of them.





Page numbers.

You can insert page numbers by click on insert, page number. You can format how you'd like these to be shown.



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