

Cochise College Center for Lifelong Learning

Word: Advanced

For Lifelong Learners

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Introduction

Welcome to **Word: Advanced**! You've already learned how to format, organize, and review documents. Now it's time to push those skills even further.

In this class, we'll explore some of Word's most powerful tools. You'll learn how to add citations and bibliographies, work with footnotes and endnotes, and create cross-references. We'll also link Excel data into Word, explore document templates, and create a personalized mail merge.

These features are especially useful for professional reports, academic papers, newsletters, and personalized letters. Don't worry—we'll take it one step at a time, just like always.

What You'll Learn Today

By the end of this session, you will:

- Create professional headers, footers, and cover pages
- Add citations and build automatic bibliographies
- Insert footnotes, endnotes, and cross-references
- Link live Excel data into your Word documents
- Create personalized letters using mail merge

Let's get started and unlock what Word can really do!

Module 1: Document Operations

In this first module, we'll work with tools that help you manage professional documents. You'll learn how to create headers and footers, use text effects to make your titles stand out, and insert icons for extra visual interest. These features help give your documents a polished look and make them easier to read. We'll take things one step at a time, so don't worry if it feels new—we'll practice each tool and undo anything that doesn't work out. Let's begin by opening our file and setting things up!

Activity 1.1: Start Word

1. Click in the Windows search bar at the bottom of the screen
2. Enter *Word*
3. When the search dialog pops up, click the **Word App** link

4. Click **Open**
5. Click **Browse** and navigate to the *Student Files* folder
6. Click **Charleston03**
7. Before making changes, save the document with a different name by clicking **File**
8. Click **Save As** from the left-side menu
9. Navigate to the *Student Files* folder
10. Change the file name to Charleston-Adv
11. Click **Save**
12. If line numbers are not already on, click Layout → Page Setup → Line Numbers
13. Choose **Continuous** to have line numbers on every line

Activity 1.2: Headers and Footers

1. Press Ctrl + Home to return to the beginning of the document
2. Click Insert → Header & Footer → Header → Edit Header
3. Headers and Footers have three tabbed areas by default: left, center, and right
4. Type About Charleston in the left header area
5. Tap Tab to move to the center of the header
6. Tap Tab one more time and move to the right margin
7. Click Header & Footer → Page Number → Current Position → Accent Bar 2
8. Click Header & Footer → Navigation → Go to Footer
9. Tap Tab two times
10. Type Date Prepared: (don't forget to include a space after that colon!)
11. Click Header & Footer → Insert → Date & Time. Choose the third format, it looks like *July 15, 2025*

12. Uncheck *Update Automatically* to freeze the date in time
13. Click **OK** when you're ready
14. Click Header & Footer → Close → Close Header and Footer
15. Save the document

Activity 1.3: Text Effects

1. Press `Ctrl + Home` to move the cursor to the start of the document
2. Triple-click the document title, *Charleston*
3. Click Home → Font → Text Effects and Typography
4. Hover the mouse over each effect and notice the change to the title
5. Click the desired effect to change the title
6. You decide the effect doesn't look good, so press `Ctrl + Z` to remove it
7. Save the document

What to Notice

Text effects can make titles more visually appealing, but they should enhance readability, not distract from it. Always preview effects before applying them, and remember that `Ctrl + Z` is your friend if something doesn't work out!

Activity 1.4: Insert an Icon

1. Click anywhere in *Line 42*
2. Tap Home
3. Click Insert → Illustrations → Icons
4. In the Icon selection box, search for newspaper
5. Click the ***Black Newspaper*** icon
6. Click ***Insert***

7. Using the *Graphics Format* tab, set Width to 0.20"
8. Set Graphics Fill to **Brown, Accent 4, Darker 25%**
9. Save the document

Activity 1.5: Custom Cover Page

1. Press Ctrl + Home to move the cursor to the start of the document
2. Click Insert → Pages → Blank Page
3. Click anywhere in *Line 1* on the new blank page
4. Tap Del to remove that line
5. Click Home → Paragraph → Center
6. Tap Enter 10 times
7. Type About Charleston
8. Tap Enter
9. Type A Short History of a Vanished Arizona Town
10. Tap Enter
11. Type Written by George Self
12. Tap Enter
13. Type January 10, 2026
14. Select the title then click Home → Font → Size → 36 pt
15. Select the subtitle then click Home → Font → Size → 18 pt
16. Select the author then click Home → Font → Size → 14 pt
17. Select the date then click Home → Font → Size → 14 pt
18. Select the title then click Home → Font → Color → Brown Accent 4 Darker 25%
19. Click in *Line 12* then tap Home
20. Tap Enter
21. Click in *Line 12* then tap Home

22. Type three dashes, -, and press **Enter**
23. Delete *Line 12*
24. Save the document

Pro Tip

Creating custom cover pages gives your documents a professional appearance. You can save time by creating a template with your standard formatting and reusing it for future projects.

Module 1 Checklist

1. Saved document as **Charleston-Adv**
2. Turned on line numbers throughout the document
3. Created a custom header with title and page number
4. Added a footer with date prepared in long-date format
5. Applied text effects to the document title (and undid if needed)
6. Inserted and formatted a newspaper icon
7. Built a custom cover page with proper formatting and sizing

Module 2: Document References

In this module, we'll focus on tools that help you cite sources, give credit, and guide readers through longer documents. You'll learn how to insert citations and build a bibliography using different citation styles. We'll also practice adding footnotes, converting them to endnotes, and creating cross-references that let readers jump to specific sections. These features are especially helpful when writing research papers, professional reports, or newsletters. They may look intimidating at first, but you'll be surprised how much Word can do for you behind the scenes.

Citations Roadmap

Here's the full process we'll follow for creating a bibliography in Word:

Step 1: Choose a citation style (APA, Chicago, MLA)

Step 2: Insert citations as you write

Step 3: Word creates the bibliography automatically

Step 4: Edit or update citations as needed

Step 5: Add footnotes or endnotes for extra information

Don't worry about memorizing this—we'll walk through each step together!

Activity 2.1: Choose a Citation Style

1. Press **Ctrl + Home** to return to the beginning of the document
2. Click **References → Citations & Bibliography → Style**
3. Choose **APA (American Psychological Association)**
4. Save the document

Activity 2.2: Create a Citation

1. Click anywhere in Line 4 and tap **End**
2. Click **References → Citations & Bibliography → Insert Citation**
3. Click **Add New Source**
4. Select **Journal Article**
5. For Author, click **Edit** to add new authors
6. Enter **Fulton** as Last name, **Richard** as First name, **W** as Middle name, then click **Add**
7. Enter **Bahre** as Last name, **Conrad** as First name, **J** as Middle name, then click **Add**
8. Click **OK**
9. For Title, enter **Charleston, Arizona: A Documentary Reconstruction**
10. For Journal Name, enter **Arizona and the West**
11. For Year, enter **1967**
12. For Pages, enter **41-60**

13. The Tag field should show *Ful67* (this is the default and should not need to be changed)
14. Click **OK**
15. Save the document

Activity 2.3: Insert a Bibliography

First, anchor the Charleston map image:

1. Press **Ctrl + End**
2. Click the Charleston map and notice the anchor icon on Line 93
3. Click and grab the anchor and move it to Line 93

Create space for the bibliography:

1. Click in Line 94
2. Click **Layout** → **Page Setup** → **Breaks** → **Page**

Insert the bibliography:

1. Click in Line 95
2. Click **References** → **Citations & Bibliography** → **Bibliography** → **Bibliography**
3. Save the document

What to Notice

Word automatically formats your bibliography based on the citation style you chose. If you change styles later, Word will reformat everything for you!

Activity 2.4: Change the Citation Style

1. Click **References** → **Citations & Bibliography** → **Style drop-down arrow**
2. Choose **Chicago**
3. Select other styles from the drop-down menu and notice how the bibliography changes

4. Select **APA** as the final style for this report
5. Save the document

Activity 2.5: Edit a Bibliography Entry

1. Click **References** → **Citations & Bibliography** → **Manage Sources**
2. On the left, you'll find the *Master List*—think of it as a library filled with references from all documents on your computer
3. On the right is the *Current List*—these are the sources you've added to the current document
4. To make changes to a source, click it in the *Master List* so it is corrected everywhere it is used
5. Click the **Fulton** entry in the *Master List* then click **Edit**
6. You notice a typing error and change Pages to 41–64
7. When you have made your changes, click **OK**
8. In the dialog box that pops up, click **Yes** to update both the *Master List* and the *Current List*
9. Click **Close**
10. Click on the bibliography
11. Click **Update Citations and Bibliography**
12. Save the document

Activity 2.6: Insert a Footnote

1. Click before the period at the end of the sentence in Line 19, "...nine miles west of Tombstone."
2. Click **References** → **Footnotes** → **Insert Footnote**
3. In the footnote area at the bottom of the page, enter There is nothing remaining of the Millville site today
4. Save the document

Activity 2.7: Change Footnotes to Endnotes

1. Click in Line 18 then tap Home
2. Click References → Footnotes → Options
3. Click **Convert**
4. Click **Convert all footnotes to endnotes**, then click **OK**
5. Click **Close**
6. Press Ctrl + Z to revert the endnote back to a footnote
7. Save the document

Pro Tip

Footnotes appear at the bottom of each page, while endnotes appear at the end of the document. Choose footnotes for brief explanations that readers might want to see immediately, and endnotes for longer references or supplementary information.

Activity 2.8: Cross References

1. Click after the period following the word *county* on Line 26
2. Enter a space, then type (See the Newspaper Articles for more information.)
3. Select the words *Newspaper Articles* (note: do not include the space after *Articles*)
4. Click References → Captions → Cross-reference
5. Select **Heading** for Reference type
6. Select **Heading text** for Insert reference to
7. Select **Newspaper Articles** from the list
8. Click **Insert**
9. Click **Close**

10. Test the new link by pressing `Ctrl` and clicking on ***Newspaper Articles***
11. Save the document

Activity 2.9: Table of Contents

1. Click in Line 15 then press `Home`
2. Tap `Enter` to create a blank line
3. Click in Line 15, then click `Home` → `Styles` → `Normal`
4. Click `References` → `Table of Contents` → `Table of Contents` → `Automatic Table 1`
5. Click in Line 20, then click `Insert` → `Pages` → `Page Break`
6. Delete Line 21
7. Save the document

Important Note

Table of contents automatically updates when you add or change headings in your document. Right-click on the table and choose "Update Field" to refresh it after making changes.

Module 2 Checklist

1. Set citation style to APA format
2. Created a citation for a journal article with multiple authors
3. Inserted an automatic bibliography on a new page
4. Experimented with different citation styles (Chicago, then back to APA)
5. Edited a bibliography entry and updated the document
6. Added a footnote with additional information
7. Briefly converted footnotes to endnotes, then reverted
8. Created a cross-reference link to jump to a specific section
9. Inserted an automatic table of contents

Module 3: Office Integration

This module shows how Word works with other Microsoft Office programs to save you time and effort. You'll learn how to insert a live link to an Excel spreadsheet, so your Word tables stay up to date. We'll also explore document templates that give you a quick head start, and finish with a mail merge that creates personalized letters using an Excel file. These tools are great for managing projects, sending custom letters, or preparing newsletters. Take your time—these are powerful features, and we'll walk through them step by step.

Activity 3.1: Add a SmartArt Timeline

1. Press **Ctrl + End** to go to the end of the document
2. Tap **Enter** a few times to create some space above the Bibliography
3. Click **Insert → Illustrations → SmartArt**
4. In the SmartArt dialog, click **Process** on the left
5. Choose **Basic Timeline**
6. Click **OK** to insert the SmartArt
7. In the first SmartArt box, type **Oct 28, 1878**
8. In the first indented bullet following the date, enter **Claim Recorded**
9. Click in the second indented bullet following the date and press **Shift + Tab**
10. Continue entering these events in the following boxes, adjusting tab indents so the date is in the first column and the event is in the second:
11. **Feb 1, 1879 - Townsite Laid Out**
12. **Apr 17, 1879 - Post Office Opened**
13. **Jun 1, 1879 - Mill in Operation**
14. **May 1886 - Mills Closed**
15. **May 3, 1887 - Earthquake**
16. **Oct 24, 1888 - Postal Service Moved**
17. To format the SmartArt, click **SmartArt Design → Change Colors** and pick a neutral theme like **Colorful Range - Accent 3 to 4**

18. Resize the graphic by dragging the corners
19. Click **SmartArt Design** → **Layouts** to preview alternatives
20. Save the document

What to Notice

SmartArt automatically adjusts spacing and alignment as you add content. You can change colors and layouts at any time without losing your data.

Activity 3.2: Link Excel to Word

Step 1: Remove the Existing Table

1. Click anywhere in the table following Line 41
2. Click **Table Layout** → **Rows & Columns** → **Delete** → **Delete Table**
3. Click Line 41 and tap **End**
4. Tap **Enter** to create a blank line

Step 2: Open Excel and Copy the Data

1. Open *Charleston-Table.xlsx* in the *Student Files* folder
2. In the Excel spreadsheet, select cells A1 through B8
3. Click **Home** → **Clipboard** → **Copy**

Step 3: Link the Excel Data to Word

1. Return to the Word document
2. Click **Home** → **Paste** drop-down arrow (important: click the down-arrow under the **Paste** button rather than just the button)
3. Click ***Link & Use Destination Styles***

Step 4: Format the Linked Table

1. Click anywhere in the newly created table
2. Click **Table Design** → **Table Styles** → **Grid Table 4 Accent 3**
3. Click ***Date*** in the first column

4. Click **Table Layout** and adjust the width to 1.5"
5. Click **Event** in the second column and set its width to 4.0"
6. Click anywhere in the table, then click **Table Layout** → **Table** → **Select** → **Select Table**
7. Click **Home** → **Paragraph** → **Center Align**
8. Click **Home** → **Paragraph** → **Line and Paragraph Spacing** → 1.0
9. Try clicking **Home** → **Paragraph** → **Line and Paragraph Spacing** → **Remove Space After Paragraph** (Note: this option may not be available)
10. Save the document

Activity 3.3: Update the Excel Table

Step 1: Make Changes in Excel

1. Open `Charleston-Table.xlsx` if it is not already open
2. Click cell B7
3. In the edit bar at the top of the screen, change *a few* to *several*, transforming the cell into: *An earthquake jarred Charleston, and several buildings sustained damage*
4. Tap **Enter**
5. Save the Excel spreadsheet

Step 2: Update the Link in Word

1. Open the Word document
2. Right-click on the table
3. Select **Links** (Note: In Office 365, this is *Update Link* and the following steps are not necessary)
4. Click **Update Now**
5. Click **Manual Update** to keep the file from automatically updating
6. In the dialog box, choose the entry with a type of *worksheet*
7. Click **OK**

8. Notice that the changed line is updated in Word
9. Click Line 43 and tap *Delete*. Be sure the next line, *Newspaper Articles* is a **Heading 2** style
10. Save the document
11. Close the document
12. Close Charleston-Table

Pro Tip

Linked Excel tables in Word stay connected to the original spreadsheet. This is perfect for reports that need regular updates—just update the Excel file and refresh the link in Word.

Activity 3.4: Mail Merge

Mail merge includes several steps. Here's a simple roadmap of the entire process:

Mail Merge Roadmap

Step 1: Start the Mail Merge Wizard and choose Letters

Step 2: Connect to the Excel file (OfferDB.xlsx)

Step 3: Insert merge fields to replace placeholders

Step 4: Preview the results with real data

Step 5: Print or save the merged letters

The merge fields pull live data from Excel—don't type them manually!

⚙️ Step 1: Set Up the Merge Document

1. Click in the Windows search bar at the bottom of the screen
2. Enter Word
3. When the search dialog pops up, click the **Word App** link
4. In the left menu, click **Open**

5. In the Student Files folder, find `Offer.docx`
 6. Click **Open**
 7. Click `File` → `Save As`
 8. Navigate to the *Student Files* folder
 9. Name the document `Offer-Merge` and click **Save**
-

Step 2: Start the Mail Merge Wizard

1. Click `Mailings` → `Start Mail Merge` → `Step-by-Step Mail Merge Wizard`
 2. In the first step, select **Letters**, then click **Next**
 3. In the second step, click **Use the current document**, then click **Next**
 4. In the third step, select **Use an existing list**
 5. Click **Browse**
 6. Navigate to the *Student Files* folder and click `OfferDB`
 7. Click **Open**
 8. In the *Select Table* dialog box, choose **CUSTOMERS\$** and click **OK**
 9. Make certain all names are checked
 10. Click **OK**
 11. Click **Next**
-

Step 3: Insert Merge Fields

1. Select `<FIRSTNAME>` in the first line (include the angle brackets)
2. Click **More Items** in the Wizard
3. Highlight the word *Firstname* and click **Insert**
4. Click **Close**
5. Select the entire *Dear* line, then tap `Delete`
6. Be sure Line 2 is a blank line. If not, insert a blank line
7. Click **Greeting Line**
8. The defaults are appropriate for this message, so click **OK**
9. Select `<LEVEL>` in the first paragraph (include the angle brackets)

10. Click **More Items** in the Wizard
11. Highlight the word *MemberID* and click **Insert**
12. Click **Close**
13. Select <ITEM> following *Offer* (include the angle brackets)
14. Click **More Items** in the Wizard
15. Highlight the word *Item* and click **Insert**
16. Click **Close**
17. Select <DATE> following *Valid Until* (include the angle brackets)
18. Click **More Items** in the Wizard
19. Highlight the word *Date* and click **Insert**
20. Click **Close**
21. Select <CODE> following *Redemption Code* (include the angle brackets)
22. Click **More Items** in the Wizard
23. Highlight the word *Code* and click **Insert**
24. Click **Close**
25. Select <CODE> in paragraph that starts *Don't miss the opportunity...* (include the angle brackets)
26. Click **More Items** in the Wizard
27. Highlight the word *Code* and click **Insert**
28. Click **Close**
29. Click **Next**

☒ **Step 4: Preview and Complete the Merge**

1. Click the arrows beside *Recipient: 1* and scroll through a few recipients
2. Click **Next**
3. Click **Print**
4. In the dialog box, select **Current Record**
5. The Print dialog box will open. Click the **X** in the top-right corner to close that dialog without printing the document

6. Click the **X** in the top-right corner of the Wizard to close it
7. Save and close Offer-Merged

Module 3 Checklist

1. Created a SmartArt timeline with Charleston historical events
2. Formatted the SmartArt with appropriate colors and layout
3. Removed the existing table and linked live Excel data to Word
4. Formatted the linked table with proper styling and column widths
5. Updated data in Excel and refreshed the link in Word
6. Completed a mail merge using Excel data source
7. Inserted merge fields for personalized information
8. Previewed the merged results with multiple recipients

Final Words

Congratulations! You've now completed all three levels of our Word training—nine full hours of hands-on learning. That's a huge accomplishment, and you should be proud of the skills you've gained.

In this class alone, you tackled some of Word's most advanced features, from managing citations to linking Excel files and running a mail merge. These are tools that many users never learn, and you've not only learned them—you've used them.

Of course, Word has even more to offer. As you continue to create documents, don't be afraid to explore the menus, try out new tools, or revisit features from earlier classes. The more you use Word, the more confident and creative you'll become.

Keep Learning

I encourage you to continue experimenting with Word in your daily life. Try using it for projects you're genuinely interested in: family newsletters, volunteer organization reports, or personal research projects.

Remember that the appendices in this handout list several resources you can explore at home, so your learning doesn't have to stop here. Most importantly, approach Word with the same wisdom you bring to any new tool.

Keep exploring, keep asking questions, and most of all, keep learning. Thank you for joining me on this journey, and I hope to see you again in another class!

Appendix A: Common Citation Styles and Where They're Used

When writing papers or reports, different fields use different citation styles. Word makes it easy to switch between styles, but it helps to know when each one is typically used.

APA (American Psychological Association)

Used In: Psychology, Sociology, Education, Business, Nursing, and other Social Sciences

Focus: Author-date format; emphasizes recent research

Example: (Smith, 2020)

MLA (Modern Language Association)

Used In: English, Literature, Arts, and Humanities

Focus: Author-page format; often used for quoting sources

Example: (Smith 42)

Chicago (Chicago Manual of Style)

Used In: History, some Social Sciences, and Publishing

Focus: Two systems: Notes & Bibliography (for History and Humanities) and Author-Date (for Science and Social Science fields)

Example (Notes): Smith, *History of Arizona*, 58.

Example (Author-Date): (Smith 2020)

Turabian (A simplified version of Chicago)

Used In: College-level writing across many disciplines, especially when students are not publishing

Focus: Same systems as Chicago but streamlined for student use

Note: Often recommended for theses and student research papers

IEEE (Institute of Electrical and Electronics Engineers)

Used In: Engineering, Computer Science, and Technical Fields

Focus: Numbered citations in the order of appearance

Example: [1]

Remember

Being cautious doesn't mean being afraid. Understanding these citation styles helps you use Word more effectively and choose the right format for your writing projects.