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Company Name Marketing Plan

Our Best Opportunity to Lead the Instrument Industry

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How To Complete This Template

Read through these instructions before you begin to complete this template. If you want to delete these instructions, select the text and press Delete. However, do not remove the styles (paragraph markers, section breaks, and so forth). The template opens in Page Layout View. It is best to work in the template using Page Layout View.

Replacing the Title Sheet

To change the company information in the top half of the title sheet, select the company name, address, and contact information, separately, and type your text. If your information is longer than the PLACEHOLDER text, reduce the point size of the text before you type your information.

You can replace the logo in this template with a new picture. To do this, select the PLACEHOLDER logo. Click Picture on the Insert menu, and then locate your artwork.

Next, select, separately, the company name, report title, and subtitle. Replace this text with your information.

Updating the Table of Contents

After you have typed your report, you can update the table of contents (TOC). To do this, click on any section of the TOC while holding down the Control key. You will be able to then click on Update Field.

To change they appearance of the TOC, click the cursor on the TOC page. On the Insert menu, click Index And Tables. Under the Table of Contents tab, select a format. If you need to adjust the TOC section margins, click within the body of the TOC. Click Page Setup on the File menu. Under the Margins tab, specify new settings for the right and left margins.

What Does XE Indicate?

XE indicates an index entry. The index field collects index entries specified by XE. To insert an index entry field, select the text to be indexed, and click Index And Tables on the Insert menu. Under the Index tab, click Mark Entry. When you have finished marking all entries, click Close. On the Insert menu, click Index And Tables, and then click OK.

In addition to producing reports, this template can be used to create proposals and workbooks. To change the existing text and graphic, use the following procedures:

- To replace the text, select Typing Replaces Selection in the Edit-Preferences-Edit dialog box. Then select any paragraph and start typing. To change a paragraph or character style, select a new style from the Style list. Paragraph style names appear with a document icon (¶) before the style name; character style names appear with a document page icon (<u>a</u>) before the style name.
- To delete a text box or graphic, click the PLACEHOLDER or graphic to reveal the frame, and then click the frame border. Next, press the Delete key on your keyboard.
- To change the shading of text borders, click the cursor on the shaded area. On the Format menu, click Borders And Shading. On the Shading tab, under Fill, select a new shade. On the Borders tab, you can add, remove, or change the color of a border.

Changing the Report Footer

The footer automatically displays the title of the report. However, you can change the footer by clicking Header And Footer on the View menu. Switch to the footer. Select the PLACEHOLDER text and type your information. Click Close to exit the footer.

Inserting a Section or Page Break

Before inserting a section or page break, turn on the nonprinting characters. To do this, select Hidden Text under Nonprinting Characters in the Edit-Preferences-View dialog box. Then, click Break on the Insert menu and select either Page Break under Insert or Continuous under Section Breaks.

Inserting a Footnote

To create a footnote, click Footnote on the Insert menu. Select the appropriate options, and then click OK. Type your information. To continue working in the report, click the cursor anywhere in the body of the report text.

How To Add Visual Aids

You can insert visual aids, such as graphics and tables, to make your report more readable.

Inserting a Graphic

To insert a graphic, click Picture on the Insert menu, then locate the kind of graphic you wish to insert. You may choose to insert a graphic from a file on your hard drive, or from the clip art collection. Other choices include lines, shapes, and charts.

Adjusting the Size or Shape of a Graphic

You may need to resize a graphic. To keep the original dimension of a graphic, click it and drag a corner handle. To reshape a graphic, drag one of the middle handles.

Inserting and Modifying a Table

To insert a table, click Insert Table on the Table menu. Specify the number of columns and rows, and the column width.

To modify an existing table, such as the table below, click the cursor on any cell. Then, on the Table menu, click an option.

Competitor	Current Share	Share in 3 Yrs.
Largest competitor	50%	30%
Second largest competitor	25%	20%
Third largest competitor	15%	12%

To edit table text, select the text and type your new information. To apply a different font to the text, click Font on the Format menu and then select the appropriate choices.

Saving Your Report

On the File menu, click Save and then type a unique name.

To print your report, click Print on the File menu. If necessary, insert blank pages into the document, so that report sections, such as TOC, Marketing Plan, and Index, start on odd numbered pages. Then, select the appropriate options and click OK.

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