

Tips for Working with Microsoft Word Documents

QUICK HELP

BASIC

EXPANDED

PROFESSIONAL

More and more, writing, editing, and proofreading involve a keyboard and a screen rather than a pencil and sticky notes—and to great advantage. Electronic editing is a boon beyond belief, provided you and the software are on speaking terms.

This aid, adapted from Chapter 6 of *The McGraw-Hill Desk Reference for Editors, Writers, and Proofreaders* book and CD (McGraw-Hill, 2006, K.D. Sullivan and Merilee Eggleston), includes all the information, screenshots, and examples included in the book, plus additional information and tips that were cut from the book because of space limitations. It's like getting a DVD with special bonus features.

You'll find tips to help you save time and do more with MS Word, plus pointers on the basics and nice-to-know extras on some of MS Word's most used and oftentimes most frustrating tools. This aid doesn't include every way to do something, just those we've found useful.

Notes

1. The information in this aid is a condensed version of Chapter 6 from *The McGraw-Hill Desk Reference for Editors, Writers, and Proofreaders* (McGraw-Hill, 2006, K.D. Sullivan and Merilee Eggleston).
2. **Version alert:** The discussion is based on the default settings in Microsoft Word 2003. If you're working with a different version, you may need to dig a bit to locate a particular tool or feature. And if your version is old enough, certain features might be missing. But for the most part, you should be able to find what you need with just a little hunting.
3. If you're not familiar with Word, learning with this aid will be easiest to follow if you have Word up and running as you read and if you have three toolbars open: Standard, Formatting, and Reviewing. So before you move on, go to View > Toolbars and make sure there's a check by each one.
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Working with Microsoft Word Documents

If you're an editor, Microsoft Word can be your best friend or your worst enemy.

It's your best friend because it is, no bones about it, *the* application of choice for editing an electronic file. In Word, changes are easy to mark and easy to see, and you'll never cramp your handwriting or wear down an eraser. You can add queries and comments all day long, with no rumpled sticky notes waving from the margins. You can search in seconds for a single word (or a single character) in a thousand-page opus. You can finesse fonts and formatting with the flick of a mouse. And that's just for starters.

Some of us forget, and some of us never knew, how cumbersome editing was before Word laid its magic at our feet. And it's not just *easier* to edit using Word; with Word, you can actually *do better work*. When you compare the tools in Word to a red pencil and a stack of sticky notes, it's hard not to marvel.

But, hey, nothing's perfect. Anyone who uses Word knows it has a few quirks. If you're on a tight deadline, Word can seem like the enemy. It tends to *think* for you, and what it thinks might not be what you had in mind. It can also seem balky, obtuse, and downright capricious. Sometimes you want to yank back the curtain and have words with the little guy pulling the strings. We know. We've done our share of shouting at blameless computer screens.

But there is no little guy. Usually, there's just a need to understand Word a bit better. There are one or two bona fide black holes in this application, but nearly always, if you know where Word keeps its tools and how to wield them, you can do remarkable things with minimal strain.

We assume that most of you have at least met Word. So we don't intend to tell you *everything* about it. You have the Word Help menu for that. Our goal is to help you make it a better friend. We'll show you Word's best editorial tools, reveal some of its shortcuts and secret passageways, and help you tap its huge potential.

Track Changes—The Better Red Pencil

To correct or improve writing, you have to make changes to it. If you're the author, working in Word, you can simply delete the old and type in the new. It's your work to craft as you please.



But if you're the editor or the proofreader, your changes are just *suggestions*, for the author or someone else to accept or reject. Those changes may be dazzling improvements, but they're nearly always still subject to review. It's the rare author or client who will trust you to tinker unattended. Most of the time, as you did in math class, you'll need to show your work.

On hard copy, you can't help but show your tracks. You mark changes by lining words out, writing words in, and using standard editorial marks. In the end, everyone can see what you've done.

In Word, to make your footprints visible (after you've saved the original file and created a working copy), you simply turn on Track Changes (Tools > Track Changes). Then you put your cursor where you want to add or delete text, and start typing or start deleting; the edits you make will be colorfully apparent.

Tip: You can also toggle Track Changes on and off by clicking the Track Changes button on the Reviewing toolbar, by double-clicking TRK at the bottom of the screen, or by pressing Ctrl+Shift+E. (For more keyboard shortcuts, see the end of this job aid.)

It's hard to count all the ways Track Changes improves on a red pencil. We've already mentioned a few, and here are four more. With Track Changes:

1. No one needs to know editing symbols—you simply insert and delete text, and anyone can understand your changes. Even clients and authors who have never seen Track Changes can grasp the fundamentals in minutes—over the phone.
2. More than one editor can weigh in, and do it clearly—it's easy to see who changed what, who asked what, who responded, and when.
3. It's easy for authors or reviewers to accept or reject your changes.
4. Because no one needs to type in your changes (you've already done it), there's much less risk of *new* errors being introduced after the work leaves your hands.



Using Track Changes

You'll find all the Track Changes tools—your editing mainstays—on the Reviewing toolbar:



It contains, from left to right:

- **Display for Review** drop-down menu (ways to see your changes and their results)
- **Show** drop-down menu (which reviewing features display, and how)
- **Previous** button (moves you to the previous change)
- **Next** button (moves you to the next change)
- **Accept Change** button (accepts a change)
- **Reject Change/Delete Comment** button (rejects a change or deletes a comment)
- **Insert Comment** button (inserts a comment)
- **Highlight** drop-down menu (a rainbow of colors to highlight text)
- **Track Changes** button (activates and deactivates Track Changes)
- **Reviewing Pane** button (shows or hides the collected changes and comments)

Some of these need little explanation; others deserve some discussion. We'll start with what matters the most—how you show changes.

The Great Balloon Controversy. In the old days (before Word 2003), Track Changes lined through deletions and underlined insertions, using different colors for different editors. Formatting changes stood out in yet another color, and comments and queries showed up as highlights in the text, tagged with a number and the editor's initials. Here's how a bit of editing looked not so long ago:

People are complex; their ~~tools~~ tools should be simple.

That was then, this is now. These days, Word edits have had an extreme makeover, moved to a place of their own, and remodeled it. Now they're in designer rectangles, off in the margin, which has been bumped out for their benefit. They have dashed and angled lines that tie them to their place in the text. Microsoft calls these rectangles "balloons"; some people enjoy them, and some people like the in-text markup better.

People are complex; their tools should be simple.

Deleted: .

Deleted: tolls



If you like the old-style edits, there's an easy way to pop these balloons and retreat to a simpler time. On the Reviewing toolbar, go to Show > Balloons > Never. It's a mantra that's made more than one editor's day. If you like your margins clean and clear, it might make yours, too.

Tip: If you choose *not* to use the balloons, be aware that you won't see formatting changes (such as roman changed to *italic* or **bold**) unless you visit your Track Changes options (Show > Options) and choose a way to make them visible. When balloons are set to Never, Word's default is to *make* formatting changes, but not *mark* them.

If you're not an all-or-none person, you can straddle the fence; you can use old-style markup for insertions and deletions, and balloons for comments and formatting changes (Show > Balloons > Only for Comments/Formatting).

Tip: If you're using balloons, you won't be able to zoom the page-viewing size up very much. If you do, your balloons will start sailing off the right margin and you'll need to scroll horizontally to see them. And if you have many balloons with long comments, you'll find that the comments become truncated (you'll see the first part of the comment, followed by ellipses [...]). Also be aware that even if you've embraced the balloons, you'll see them only in Print Layout View and Web Layout View. For more on these views, see the tip in the next section.

One Document Four Ways. For even more control over the way changes appear (or don't appear) onscreen, go to the Display for Review drop-down menu. There are four choices here, two with markup showing, and two without.

While you're editing, you'll want to use Final Showing Markup. With Track Changes on, you'll see your insertions, deletions, comments, and—if you've chosen a way to make them visible under Show > Options—formatting changes. The first example is balloon free; the second is with balloons turned on:

Proofreaders pick up on the pickiest particulars^[ME1].

Proofreaders pick up on the pickiest particulars.

Comment [ME1]: Deletion of second period okay? Have assumed this is not an ellipsis.

Deleted: .

Formatted: Font: Not Italic

Some of the other options under Display for Review are good for special purposes. Final view shows you the document as it would look if all your changes had been accepted; no markup shows anywhere. This view is helpful to use as you do your final

reading. Without all the markup, you'll more easily see small errors—such as extra or missing spaces—more clearly, and get a better sense for how well your changes really work.

Original view shows the text as it was before you made your first mark. It can be helpful to return to this view if you've made so many changes you've forgotten where you started.

If you're not using balloons, Original Showing Markup is almost identical to Final Showing Markup. The only difference is in how formatting changes are shown. If you *are* using balloons, the way insertions and deletions appear is reversed from the way they appear in Final Showing Markup. There must be a good use for this view, but to be honest, we haven't found one.

Tip: Besides the viewing choices you have on the Reviewing toolbar, you also have the five that appear under View or in the lower-left corner of the screen—Normal, Web Layout, Print Layout, Outline, and Reading. To see all the art, comments, and other inserts in your document, be sure to view it in Print Layout View.

Having Your Say. There are two ways to add comments and queries in a Word document—using the built-in Comment feature and taking the do-it-yourself approach.

With Word's Comment Feature. To add a note using the Comment feature, place your cursor in the text where you want the note to appear and click Insert Comment on the Reviewing toolbar.

When you do, the word closest to your insertion will sport a pair of brackets and a highlight. If you're using balloons, one will appear in the margin, and you can type your note directly in it.

If you've banished balloons, a pane (the Reviewing Pane) will pop open at the bottom of the screen, giving you a spot to type your message. Type away, and when you're done, close the pane by clicking the Reviewing Pane button in the toolbar.

If you're not using balloons, you'll see your initials (if the computer you're using is yours) and the number of the comment as part of the highlight in the text:

Editors are exacting; they're also [curious]ME2].



If you *are* using balloons, you'll see the comment number, your initials, and the text of the message all in the margin, in a shaded balloon. The highlight and brackets remain in the text, tied to the balloon by its dashed string:

Editors are exacting; they're also curious.

Comment [ME2]: By curious, do you mean odd, or inquisitive?

Deleted: .

Whether or not you use balloons, when you insert a comment, you'll always leave a highlight in the text. When the cursor is placed in the highlight, the text of the comment pops up, along with an incriminating little narrative of exactly who did what, when.

Merilee Eggleston, 10/20/2005

12:22:00 PM commented:

By curious, do you mean odd, or inquisitive?

Editors are exacting; they're also curious [ME2]

There's no fudging your time sheet—this pop-up will tell the world your full name and *exactly* what day and time you inserted the comment. (The same thing applies to highlighted insertions and deletions. There's no place to hide.)

This electronic trail is a good thing, really; when more than one person is working on a file, it can be hard to tell at a glance whose changes are whose. But the pop-ups never lie.

Tip: If you want to make the text you're commenting on even easier to spot, you can highlight as much of it as you like *before* you click the Insert Comment button. That way, your Comment highlight will cover not just one word, but a phrase, a sentence, or a whole section of text.

Directly in the Text. If you wish, you can bypass Word's Comment feature altogether and simply type your notes in the text. Some people prefer to see them that way. It's a great idea to bracket an in-text note with characters that aren't used (or aren't used in that combination) anywhere else in the document. That way, the notes are easy to find by doing a search (see Searching, below) for that unique character or combination. You can also make such notes stand out with highlighting. For example (in eye-popping pink):

{{Q: By curious, do you mean odd, or inquisitive?}}

The Highlight button gives you lots of colors to choose from. Just run your cursor over any text you'd like to draw attention to, select a Highlight color, and click on it.

Reviewing. You may not be the only one adding comments or making changes to a Word file. Sometimes other people have chimed in before it ever gets to you. In that case, you'll probably want to look at their work before you do any of your own. And even if you *are* the only editor, at some point you'll want to review your changes one by one.

If you're using balloons, you can just run your eyes down the margin to spot and review each change or comment. If the changes are in the text only, step through them using the arrows on the Reviewing toolbar.

The Next (right-facing arrow) button pops you from one change or comment to the next, sequentially through the document. If you put your cursor at the top of the document and click the Next button, you can look at each change, one by one. If you want to go back for any reason, just click the Previous button.

Tip: Wherever there's a tracked change, Word puts a vertical line in the margin next to it. If you're looking through a document for changes without the help of Next and Previous, these thin rules will alert you to tiny things you might otherwise miss—a period here, a semicolon there, an extra space that doesn't belong.

Accept/Reject. Once changes and comments are made, someone must consider and act on them. That means accepting them, rejecting them, or adding something new.

There are times when you'll accept or reject changes made by others before continuing with your own work. You'll probably need to get an okay to do so. But usually, the person who says yea or nay to changes is the author or whoever has requested the editorial work. If he or she isn't familiar with Word's Accept/Reject function, it takes only moments for you to explain it.

Those who are new to Accept/Reject almost invariably love it. It turns a marked-up manuscript into a finished file in very short order, and the process has an off-with-their-heads feel about it—click! this change stays; click! that one goes.

This imperial power resides in the blue check mark and the red X on the Reviewing toolbar. Place your cursor in a marked change or a balloon, then click the check mark to

accept it or the X to reject it. If you accept it, the change becomes part of the finished document. If you reject it, it's gone before you can blink, and the text reverts to its original condition.

Word comments are never incorporated into the finished document (although the do-it-yourself, in-text variety can be, because they're just inserted text; watch out, and see the warning below). Once a Word comment is dealt with, if it's a balloon you can reject it in the usual way. If you're not using balloons, just double-click the bracketed comment number area to highlight it, then click the Reject button or tap the Delete key.

Warning: Accept/Reject is incredibly quick and easy—sometimes *too* quick and *too* easy. In the drop-down menus next to the check mark and the X, you'll see several options for how *much* you accept or reject at a time. Unless you're absolutely positive that you know every last change in your document and want them all dealt with the same way, never, ever, choose an option that contains the word *All*. Take a little extra time and look at each change—or each group of changes (see the Tip below)—as you accept or reject it (or them). There's too much risk of losing or incorporating something you never meant to if you take the global approach.

Tip: Even if the *All* options are too risky, you *can* safely accept or reject more than one change at a time. Just highlight a section that contains several changes, all of which you want to either accept or reject, and then click the check mark or the X. It's a way to speed up the process and still keep an eye on what stays and what goes.

Beyond Track Changes

The Reviewing toolbar holds most of the electronic editing tools you'll need, but not all. Word's other menus and toolbars help you with more than markup.

Checking Spelling and Grammar

Word's spell-checker is something you'll use on every single item you edit in this application, once you're done with all your changes. Put the cursor at the top of your document and click the ABC check mark button in the Standard toolbar. The spell-checker will pick up some things you don't want it to, but for the most part, you'll be glad you ran it. It's a lot of insurance against silly and embarrassing errors for a very small investment in time.

Warning: While Word's spell-checker is a boon, it also has some blind spots. Keep in mind that it will never squawk about a bona fide word, even if that word is the result of a typo. For instance, it will never let you know that you've typed *his* when you meant to type *this*, or *its* when it should have been *it's*.

Word's grammar checker, on the other hand, is a mixed blessing at best (okay, we hate it, and so does everybody else we know). This bit-bound curmudgeon is about as nuanced as a \$3 calculator and as sensitive to the language as a visitor from Mars. Maybe less. It's simply wrong most of the time, or else catering to outdated grammar fetishes.

Sure, you can go to Tools > Grammar and Spelling > Options > Settings and uncheck most of its pet peeves, but at that point, why bother to use it at all? One option is to just go to Tools > Options > Grammar and Spelling and uncheck anything under Grammar.

Searching

Remember when we said you can actually *do better work* editing in Word? This tool (Edit > Find) is a big part of why. Another name for it might be the Consistency Checker.

As you work, you'll come across details that seem inconsistent—a spelling here, a heading style there, a capital letter someplace else—and you'll want to make sure that item is treated the same throughout. With a hard-copy document, ensuring such consistency depends on your memory, your eyesight, and how much time you have to comb through the work. In the end, you can only *hope* you've caught all anomalies.

Or you might want to find out if a term is being used for the first time. You might want to check all the tables, to be sure they're numbered consecutively. You might (and should) want to check for double spaces. Whatever. There are endless reasons to use Word's Find feature.

With it, you can search, in seconds, for the tiniest detail in the longest document. The items you collect on a search list can be dispatched in a very few minutes, and when you're done, you'll *know* you've seen them all.

To make things even easier and more consistent, you can use the Find and Replace option. Just type in what you're looking for and what you'd like to replace it with. You can make the substitution on a case-by-case basis, or with a single click of Replace All (but be as leery of this as you are of Accept All Changes).



Find is a powerful tool, and it lets you refine your searches in *very* useful ways. Click the More button on the Find tab to see the possibilities. Don't forget to click the Format and Special tabs, too. With these options and some creative thinking, Find will take you directly to almost anything in your document.

Tip: Find and Replace is one place where, sometimes, if you're careful, it just might be safe to choose the *All* option. For instance, if you know you want to change all hyphens in ranges of numbers to en dashes, you could use the Special menu under Find to set up a search for *Any Digit-Any Digit* and replace it with *Any Digit^=Any Digit* (the caret-equal sign combo is the code Find inserts when you choose "En Dash"). Then click Replace All, and it's done.

Inserting Breaks

In Word, comments are just one of the things you can insert. Authors often insert pictures, diagrams, hyperlinks, Excel files, and objects from other places. As the editor, you probably won't do that kind of inserting.

But if you're responsible for the final look and function of a document, you'll often insert *breaks*. Word has several different kinds (Insert > Break):

Page Break. You'll use this break most often. It simply ends one page and starts a new one—a useful way to split sections of text where *you* want to rather than where bottom margins dictate.

Tip: We hate to mention this, but be aware that because of differences in printer driver definitions, pages can break differently on different systems. So don't be surprised if you and someone else are looking at the same version of the same file and a heading that appears on your page 11 appears on their page 12.

If you want to be sure the pages you've worked on break the way you've specified when someone else prints them, you and the recipient of your work will need to make sure your printer drivers are configured the same. If that gives you a headache (and it certainly gives *us* one), you can save your file as a PDF. That will freeze your formatting and take printer drivers out of the equation.

Column Break. In multicolumn text, you can insert a column break wherever you like, to control where material falls and to balance uneven columns.

Text Wrapping Break. This break forces text to wrap to a new line wherever you insert the break. You can accomplish the same thing by pressing Shift+Enter.

Section Break. A section break ends a section of text and starts a new one, so the formatting of the new section can be different from the one that just ended. There are four different kinds of section breaks:

- **Next page.** This is just like a page break, except that it starts a new section as well as a new page.
- **Continuous.** This doesn't force a new page; it just begins a new *part* of a page. For instance, Word inserts a continuous page break automatically when you highlight a section of text and format it as multiple columns.
- **Even page.** This break starts a new section on a new page, and that page will have an even number. So if you insert it on an even page, there will be a blank odd page between the two.
- **Odd page.** This is the same as an even page break, except that the new page *it* starts is an odd page. If you insert the break on an odd page, you'll get a blank even page between the two.

Inserting Symbols

The symbols on your keyboard barely scratch the surface of what you can include in a Word document. You have more dingbats, doodads, and doohickeys at your fingertips than you can imagine (or ever use). Just go to Insert > Symbol and take a peek under Font.

If it's a clever icon you want, try Webdings or Wingdings. If you need mathematical operators, something in Cyrillic, or a Greek diacritical, look under Subset. Whatever you need, it's there.

If you want to insert something more mundane—an em dash, for instance—go to the Special Characters tab.

Tip: If there are symbols you use often, it's easiest to insert them with a keystroke combination, or shortcut. Look on the Symbol dialog for an existing shortcut, or make one of your own by clicking the Shortcut Key button.

Alphabetizing

Or, as Word would have it, *Sorting*. This is great timesaver if you know where to find it.

To sort any list into alphabetical order, highlight it, go to *Table (yes, Table) > Sort*, and choose *Paragraph and Ascending* under *Sort By*. Then click *OK*, and provided your list items are on separate lines followed by paragraph returns, they'll be in alphabetical order.

A simple process, but not without quirks. For instance, if you have extra paragraph returns in your list, Word will remove all the extra spaces from the list and pile them at the start (so much for your manual formatting). It will also put numbers at the beginning, and it sorts *them* digit by digit, not quantity by quantity:

1
17
3

In addition, Word belongs to the “letter-for-letter” rather than “word-for-word” school of alphabetizing. So you'll see:

grand hotel
grand jury
granddaughter

Webster's would put granddaughter at the top. But these are small peccadilloes, not vexing enough to forego the convenience of instant alphabetizing.

Tip: This function is a great way to keep your style sheet in perfect alphabetical order no matter where you toss in new terms.

Formatting

Many times, production gurus, not editors, handle the finer points of formatting a Word document. But even if your focus is the words and not the window dressing, there are items you'll need to format as a part of your editing.

And sometimes, particularly in business settings, whoever edits a document (report, newsletter, manual, etc.) also shines it up for printing and distribution. If that's your job, you'll need Word's formatting tools to do it—and there are a lot of them.

In fact, Word offers so many ways to alter the appearance of a document that we won't even pretend to cover them all. Instead, we'll confine ourselves to the formatting tasks editors tackle most often, and the things that sometimes make them grind their teeth.

Over the years, we've spent way too much time fighting the formatting instead of tending the words, and we bet you have, too. Here are some ways to restore balance.

Make Word Less Helpful

Word wants so much to help. "Eager" just doesn't cover it. But you don't *always* want to replace a *c* in parentheses with a copyright symbol; you aren't *always* writing a letter when you type the word *Dear*. Sometimes you *do* want to type two capital letters in a row, and sometimes you *don't* want your quotes to curl. We know.

Here's how to curtail Word's default desire to please. Go to Tools > AutoCorrect options, and uncheck everything you'd like Word to *stop* doing. Some items appear on more than one tab, so be sure to uncheck them wherever they appear. Then go to Tools > Options and do the same thing. If you're serious about controlling Word's impulses, pay special attention to the Compatibility tab you'll find there.

Tips: People who are using older versions of Word and who *do* want their quotes to curl often run into a problem: getting them to curl the right *way*. If you're using smart (curly) quotes, and you type '01, you want the quotation mark to curl away from the number, like an apostrophe ('01), rather than toward it, like, well, a quotation mark ('01). Word understands that now, and obliges. But that subtlety escaped the older versions. The solution: trickery. If you're using an older version of Word, and you want your apostrophe to do a backbend, just type *two* apostrophes, then delete the first one ("01).

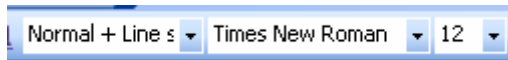
Another small secret: If you want to change a smart quote to a straight quote while you're typing, press Ctrl+Z (Undo) immediately after you type the mark. It will change from curly to straight (the reverse doesn't work, however).

And if you want to let Word make substitutions—like changing typed-in fractions (1/2) to fraction characters (½)—but retain veto power, you can leave the substitution options checked in AutoCorrect and override Word at your discretion by pressing the backspace key as soon as Word makes its substitution. Whatever Word just inserted will revert to the way you typed it.

Take Advantage of the Toolbars

If formatting is part of your project, Word's Formatting toolbar will get almost as much of a workout as the Reviewing toolbar. With it, you can:

Change the style, font, and point size of text:



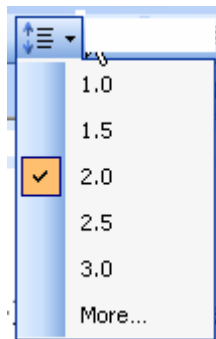
Click on **B** for bold, *I* for italics, or U for underlining:



Left align, center, right align, and justify text:



Change the line spacing of text:



Create numbered or bulleted lists:



Choose a highlight color or a font color:

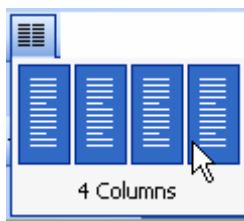


And in addition to the *real* basics, like opening, closing, saving, printing, cutting, copying, pasting, and spell-checking, the Basic toolbar contains editorial extras. On it, you can:

Insert a table, choosing the number of rows and columns in it:



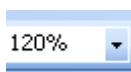
Create columns by highlighting text and choosing how many columns you'd like it to break into:



Show and hide formatting codes like paragraph marks, tab marks, and space marks:



View your document at a larger or smaller size (note that this is *viewing* it at a different size; changing the viewing percentage doesn't actually change the point size):



You can choose a percentage from the drop-down list or type in your own percentage. Either way, be sure to return it to 100% and save that change if you're sending the file to someone else to review.

Make Yourself a Macro

To the technologically timid, this may sound daunting. And if you were going to actually *write* one, it probably would be. But Word lets you simply *record* a macro, and even gives you a toggle button (REC) to do it, right next to TRK at the bottom of the screen. It couldn't be less intimidating.

What *is* a macro? It's a little program that records a whole series of actions, then performs them, like a trick pony, whenever you tell it to. If you have the same formatting task(s) to do over and over, macros can save you time and maybe even repetitive stress injuries.

For instance, let's say you need to change the first word of every list item in a 300-page document from 12-point Times New Roman to 14-point bold italic Tahoma. You can click in the first one, mouse up to the style drop-down, scroll down to and choose Tahoma, choose 14-point type, click on the bold button, and click on the italic button. Then you can do all that 179 more times.

Or you can click in the first word, double-click REC, name your macro, assign a keyboard shortcut to it or create a clickable toolbar button for it—whichever you prefer—and *then* go through all those other motions. When you've successfully changed the appearance of the word, stop recording your actions by double-clicking REC again. If REC is grayed out as not an option in your version of Word, you can also go to Tools > Macro > Record New Macro to begin the process and to stop recording, click Stop Recording on the little pop-up that appears while you're recording.

Now, for the remaining 179 font changes, all you have to do is place your cursor and tap a couple of keys or click a toolbar command. Which way sounds easier? Technophobes take note: macros save so much time (and wear and tear), you can't afford *not* to record them.

Make Bullets and Numbers Behave

In our experience, nothing in Word is more likely to misbehave than bulleted and numbered lists. They may never reform entirely, but a few pointers should make them mind their manners (mostly):

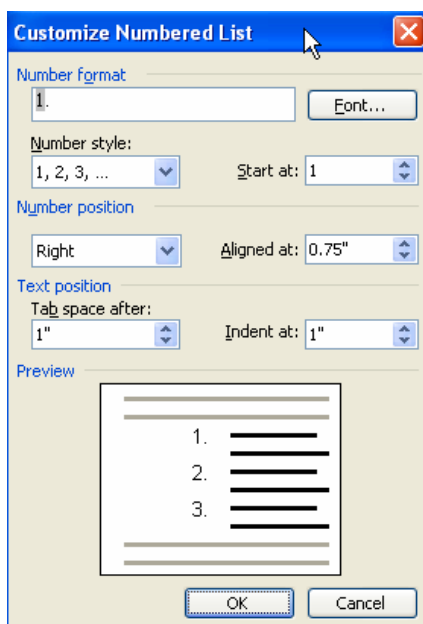
Inserting Lists. Insert bulleted and numbered lists by clicking the Bullets and Numbers buttons on the Formatting toolbar, or by going to Format > Bullets and Numbering. Don't insert them by manually adding spaces and typed-in numbers or inserted bullet images (from Insert > Symbol). If you do, you'll have alignment problems.

Setting List Indents. Control the indent distance from the margin, and the indent distance from the bullet or number to the start of the text, by setting tab stops on the horizontal ruler above your document, or by specifying indents in the Customize Bulleted List dialog (go to Format > Bullets and Numbering, and click Customize). Set

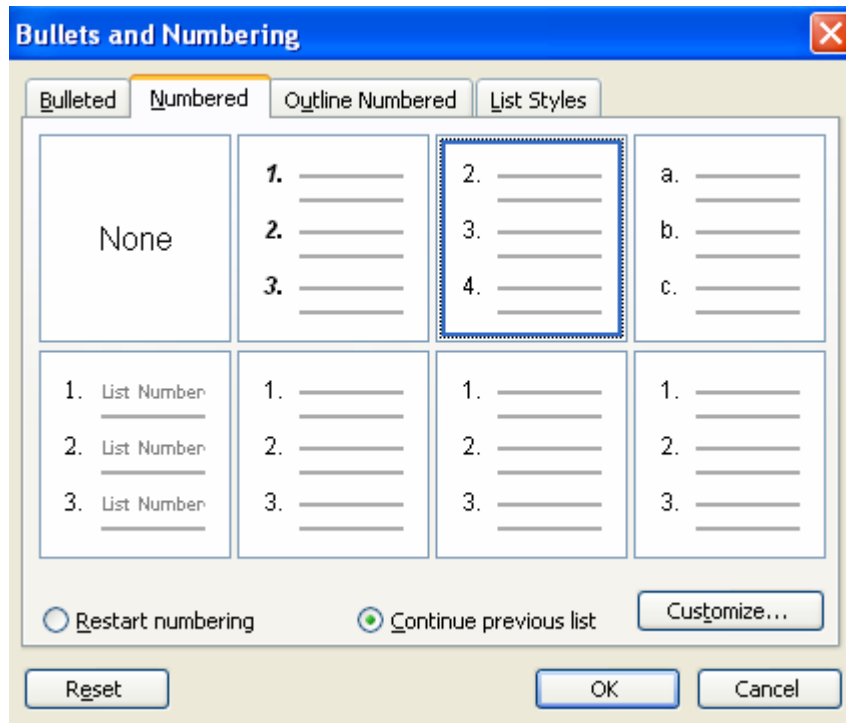
indents for an entire list by highlighting the whole list and then clicking tab stops on the horizontal ruler.

Tip: To indent all the text of a bulleted or numbered item, put your cursor in the paragraph and press Ctrl+T twice (if you have two tab stops set) to vertically align all text with the first letter following the bullet or number.

Managing Numbers. In long numbered lists, keep spacing consistent (and periods following numbers aligned) by choosing Right under Number Position in the Customize Numbered List dialog.



To start list numbering over at 1, place your cursor in the first item of the list you want to renumber and choose Restart Numbering on the Numbered tab of the Bullets and Numbering dialog. To continue list numbering from a previous list, choose Continue Previous List on the same tab.



Managing Bullets. Choose bullet styles from those offered on the Bulleted tab of the Bullets and Numbering dialog, or create your own in the Customize Bulleted List dialog. But be wary; if you use too many (more than two or three) bullet styles in a single document, strange things may happen. Bullets may suddenly disappear or be replaced by other things. No one, including Microsoft, seems to know why.

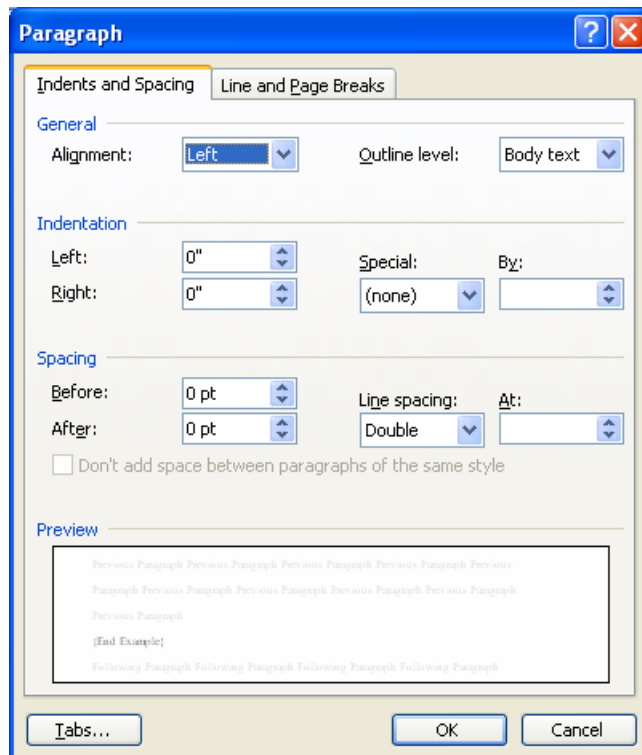
Tip: As you choose and use bullet and number styles, they'll be reflected in the choices you see when you open the Bullets and Numbering dialog. After a while, some of the original choices you saw there may be replaced by your more recent choices. To restore the default bullet and number style choices, just click the Reset button in that dialog.

Use Fonts with Finesse

The English alphabet may have 26 letters, but Word has about 26,000 different ways you can display them. Font styles, sizes, and colors are available on the Formatting toolbar, but go to Format > Fonts to see *all* the possibilities. Choose small caps or all caps, strikethrough or underline, superscript or subscript, and other special treatments. For subtle adjustments, look to the Character Spacing tab; for gaudy options, go to the Text Effects tab.

Set the Spacing

The space bar and the Enter key have their place, but don't count on them for everything. You'll have much more flexibility, and your document will be much more orderly, if you use the spacing and alignment options on the Formatting toolbar or under Format > Paragraph.



The two tabs in the Paragraph dialog let you control indents and alignment (left, right, center, or justified) of text, line spacing and the spacing before and after any element, and where pages and paragraphs break and don't break, among other things.

If you want to make sure a heading and the text that follow it don't appear on two different pages, you don't need to add extra hard returns to force the heading to the page where it belongs. Just put your cursor in the heading and check "Keep with next" on the Line and Page Breaks tab. That way, wherever the next paragraph goes, the heading will follow.

Tip: "Keep with next" really means just that. If your heading doesn't move when you select that option, it may be because what's next is a paragraph return between the heading and the text it introduces. Apply "Keep with next" to the intervening paragraph return *also*, and both of them will stick, as a unit, to the text that follows. Better still, replace the extra paragraph return with space you define (see below).

Two of the most useful features in the Paragraph dialog are the Before and After options under Spacing. With these, you can define how much space appears before and/or after headings, paragraphs of text, items in lists, items in tables, and anything else that needs a little air. Just place your cursor in a paragraph, or highlight a whole section, and specify your space. For perfectly consistent formatting, choose the same amount of space around the same type of item throughout your document.

Tip: If you're trying to squeeze just a *little* more onto a page and that page has a list or two, here's a trick: highlight the list(s) and reduce the space between list items by a point or two. The reduction won't be noticeable, but it might give you the extra space you need.

If you're defining text elements with template styles (e.g., Heading 1, Normal, Bulleted List, etc.), you can use the Paragraph dialog just once to define spacing as a part of those styles (for the document you're working on only), so you don't have to apply it repeatedly from the Paragraph dialog or the Formatting toolbar.

For instance, if you want your Normal text to be double-spaced instead of the default single-spaced, go to Format > Styles and Formatting and right-click on Normal in the list of styles. Choose Modify, click Format, choose Paragraph (look familiar?), and select Double under Line spacing. Click OK on your way out, and now everything that's Normal style in your document will be double-spaced. You can make spacing and alignment adjustments to any style (and many other adjustments, too), and save yourself trips to the Paragraph dialog.

Take Tables in Stride

Lots of writing includes tables, so there's no sidestepping them. And there's no need to. Word does its best to make inserting, styling, and editing tables convenient and automatic. And its best is pretty good. Here's a collection of tips to take the terror out of tables:

Tables Longer Than One Page. If your table runs to more than one page, you'll need to decide where you want the table to break. If you want to allow Word to break the table automatically at the end of the page, but you want to make sure the break doesn't come in the middle of a row, *uncheck* "Allow row to break across pages" under Table > Table Properties > Row. That way, Word will break the table only after a whole row.

If you want to break the table yourself, at a spot of your choosing, place your cursor in the row *below* the one you'd like to end with, and insert a page break (Insert > Break > Page break or Ctrl+Enter). The table (and the page) will end with the row above it, and the row where you placed your cursor will move to the next page.

Repeating Heading Rows. When your table is more than one page long, you'll probably want the table headings to repeat on new pages. To be sure they do, highlight your heading row or rows and go to Table > Heading Rows Repeat. Click to activate this option. Blissfully simple.

Tip: This works only on the first and second rows of a table, and only if you're letting Word break the table for you. If you're inserting a manual page break, you'll have to duplicate heading rows manually on new pages. But Word makes that easy, too. Just insert however many rows you need at the start of a new table section (Table > Insert > Rows Above), then copy and paste heading text into those rows from the heading rows on the previous page.

Splitting and Merging. If for some reason you want to split a table into more than one piece, but leave the pieces on the same page, go to Table > Split Table.

To merge table cells, so two or more cells become a single cell, just highlight the cells and go to Table > Merge Cells. This is an easy way to create space for titles that cover more than one column.

| | January Through March | | April |
|-------|-----------------------|----|-------|
| North | 12 | 24 | 10 |
| South | 15 | 6 | 12 |
| East | 7 | 14 | 9 |
| West | 4 | 3 | 17 |

To do the opposite—to divvy up one cell into two or more cells—highlight the cell, go to Table > Split Cells, and choose the number of columns and rows you want to create.

Tip: To convert a section of text to a table, highlight it and go to Table > Convert > Text to Table. You'll be asked to make a few choices, then, voilà, you'll have a table. To convert a table to text, highlight it and go to Table > Convert > Table to Text. In the right circumstances, these options can seem like magic.



Deleting and Moving. If you highlight the entire contents of a table and click Delete, you'll delete only the words *within* the table. To delete the table itself, make sure the small squares around the table are also highlighted, or go to Table > Delete > Table.

To position an entire table (flush left, center, flush right, etc.) look for the small boxed-cross icon that appears at the upper left of the table (in Print Layout View) when you run your cursor over the table. Click the cross to highlight the table, then move it just as you'd move text.

Advanced Options

Word's toolbox may not be bottomless, but there's no denying it's deep. Beyond markup, beyond comments, and even beyond formatting, Word has more gadgets to make your editorial life easier. Here are a few things you might like to do with them.

Add Automatic Tables of Contents

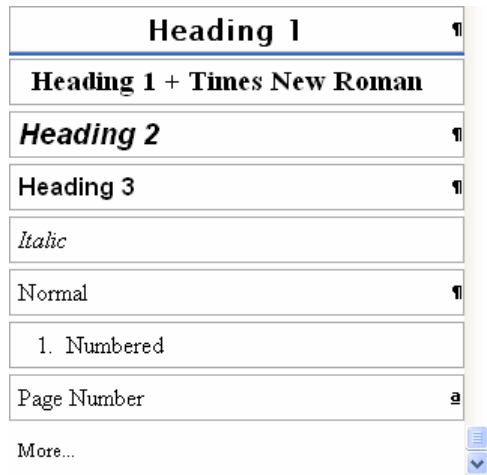
You can do some impressive things with Word fields, but they're a subject for independent study (and extra credit). We have a supply of gold stars for anyone who wants to do it.

Most of the time, there's just one field you need to use: TOC. When you insert a TOC field, you insert an automatic table of contents, and that's something worth knowing how to do.

A table of contents field picks up headings in the text and plops them with their page numbers, according to their outline level, into a table of contents that reflects *exactly* what's in the document. In the process, it makes all the entries in the table of contents links, so you can just press Ctrl, click anywhere in the entry, and go straight to that spot in the document. If you change the wording of a heading or it wraps to another page, or you delete a heading or add a whole new one, the table of contents will know it and show it (see Updating the Entries, below)—but only if you've styled your headings correctly.

Styling Your Headings. For an automatic table of contents to pick up text headings, the headings must be styled using named template styles—Chapter Title, Heading 1, A Head, that sort of thing—that are different from the styles used in the rest of the document. If your whole document is styled Normal, Word won't be able to differentiate the headings from the text.

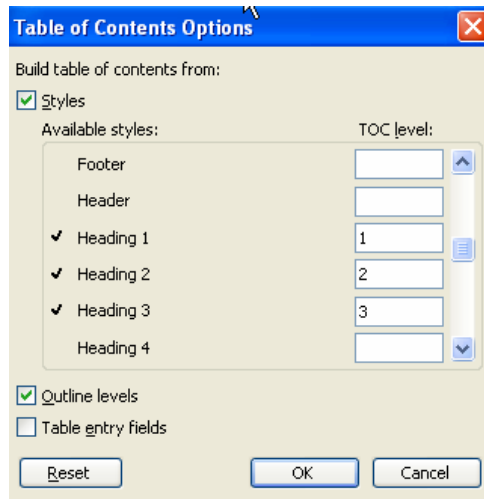
Once you've highlighted a heading, you can give it a text style from the Styles drop-down menu on the Formatting toolbar, or you can go to Format > Styles and Formatting.



From that location, you can right-click on a style name, choose Modify, and do just about anything you like with heading styles. You can alter them (make them any size, any font, centered, flush left, underlined, outlined in lights—it's up to you) and name them anything you want. You can call your level 1 headings *Ralph* if you like.

Warning: When you create new styles or modify existing styles, make sure the Automatically Update box is *unchecked*. If it's not, and you make a manual change (say, italics for emphasis) to an individual item that carries a template style (say, a bulleted list item), you'll automatically change the style of *every* item in the document that carries that style. Editors discover whole new vocabularies when things like that happen.

The Table of Contents Options dialog (Insert > Reference > Index and Tables > Table of Contents > Options) shows you all the named styles in your document's style template and lets you assign a hierarchy (1, 2, 3, and so on) to the ones you choose (Ralph, for instance).



Once that's done, the TOC field will pick up everything in the document that carries the styles you've specified and tuck it into the table of contents, according to its designated level.

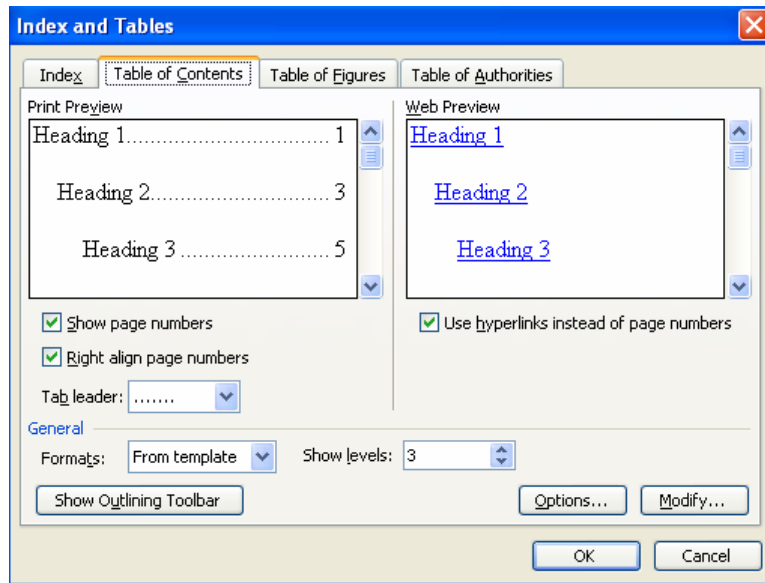
A table of contents is really just an outline, so level 1 headings will be farthest left in the table of contents, level 2 headings will be indented from the level 1s, level 3 headings will be indented from the 2s, and so on, in good outline style.

You can probably see this pitfall coming: *your table of contents will be only as accurate as your style definitions*. Computers only read your mind when you don't want them to, so for this whole thing to work, you must be careful to style every heading correctly, and to use those styles for nothing else in your document.

Tip: If all this styling perfection sounds like pressure, don't worry; in many cases, if you've made a mistake, you'll see it right away in the table of contents. Inappropriate items will appear, error messages will sprout, the outline style will be off, and you'll easily see what you need to correct.

You *will* need to verify that all headings that should appear do, and at the right level, and that nothing that shouldn't appear is included. But once you're satisfied that your document and the table of contents are in sync, you can rest easy and enjoy those automatic page and wording updates.

Inserting the Table of Contents. With your headings styled, place your cursor in the document where you'd like the table of contents to appear, and go to Insert > Reference > Index and Tables.



If you like the defaults on the dialog that appears, and your heading styles match the styles shown, just click OK. An automatic table of contents springs to life next to your cursor.

If you'd like your table of contents styled differently, this dialog offers prepackaged formatting options, or you can click Modify and tweak the appearance of the text. Word really gives you free rein here.

Tip: Tables of contents (and other fields) show up shaded in text, but it's not really shading and it won't print. It just appears in the file to indicate an inserted field.

Updating the Entries. When your table of contents goes in, it reflects what's in the document *at that moment*. But if anything changes in the document, you'll need to update the table of contents before you see the changes there (so it's not completely "automatic").

Fortunately, updating is simple. Just place your cursor anywhere in the table and right-click. Choose Update Field, then decide whether you want to update the entire table or just the page numbers. You'll almost always want to update the entire table, to catch any little thing that's changed since the last time you updated. You'll want to be especially sure to do it at the end of your work, along with that final spell-check. It takes mere seconds, and it's good insurance.

The only time you might want to update just the page numbers is if you've made a manual change to the text of the table of contents and don't want to lose it, but that's a pretty rare event.

There's another way (naturally) to update the table of contents. You can click Update TOC on the Outlining toolbar.

There are two versions of this toolbar: the fully loaded, and the lite. If you go to View > Outline, you'll see the full-featured version. If you go to View > Toolbars > Outlining, or click Show Outlining Toolbar on the Index and Tables dialog, you'll see a much-reduced version. On either version, you'll see Update TOC. Click it and proceed.

These toolbars offer other handy options, too. To add an entry to your table of contents, just place your cursor in the item you want to add and choose the appropriate level from the Outline Level drop-down. Then update the table of contents; whatever you've just redefined will appear there.

Be forewarned, though: when you pick a level, you'll assign that level to the *entire paragraph* where your cursor resides. You can't select specific text by highlighting it. So be sure any headings you want to include are on lines of their own.

To remove an entry, you can assign it a level that doesn't appear in the table of contents (Body Text, for instance). To make either operation even easier, you can change text levels with the arrows next to the drop-down.

And if you want to quickly review heading levels in your document, go to the Show Level drop-down on the expanded version of the Outlining toolbar. There you can look at any one level of heading, or all of them (for more, see Check Heading Levels, below).

Insert Hyperlinks

In a Word document, you can create clickable links to:

- Other places in the same document, such as the top of the document or a section within it
- Other documents on your hard drive or on your company's network
- Any Internet address

To insert a link, place your cursor where you want the link to appear and go to Insert > Hyperlink (or press Ctrl+K) and type the text of your link in the "Text to display:" field.

Depending on the type of link you're inserting, Word will then help you navigate to your destination and complete the process.

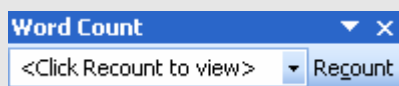
Check the Word Count

If you're an author writing an article or putting together a newsletter, you might be working toward a specific word count. For you, length is what matters.

If you're an editor or proofreader, time is what matters. How long will it take to complete an editorial project? In both cases, word count is key. Although the concept of a "page" has become a tad abstract in the electronic age, the standard way to estimate how long it will take to edit or proofread a document is still calculated using pages per hour.

In the days of hard-copy manuscripts, a page was defined as an 8½" x 11" double-spaced sheet. In a Word file, a page is considered approximately 250–300 words. For help in estimating your time (or the length of your article), go to Tools > Word Count and you'll see how many pages, words, characters (with or without spaces), paragraphs, and lines are in the file you're working on. And you can choose whether to include footnotes and endnotes if you have those in the file. The count doesn't include comments you've inserted with the Comment feature, because they won't be part of the finished file. (If you've typed them directly in the text, however, comments will affect the word count.)

Tip: If you'd like to keep *very* close tabs on the word count, choose the Show Toolbar option. With the Word Count toolbar open, you can check the count as often as you like just by clicking Recount.



Compare Text

If you've used the text comparison tools that Word keeps under Window, you probably wonder how you ever lived without them. If you haven't used them before, prepare for a treat.

What editor or proofreader doesn't frequently need to compare something in one document (or part of a document) with something in another? None that we know.

Word makes it delightfully simple to do so—without constant scrolling or minimizing and maximizing.

To compare two documents side by side, go to *Window* and choose *Compare Side by Side with...* To split one document horizontally into two independent sections, choose *Split* and then click in the document. To see and work with several documents on your screen at the same time, choose *Arrange All*. (When you apply *Split*, the option in the *Window* menu becomes *Remove Split*. Choose that when you want your document back in one piece, or else just grab the horizontal bar with your mouse and slide the bar off the top or bottom of your page.)

Once you have your desired combination, you can choose *New Window* to preserve that view as a separate document, so you can flip back and forth between your combined view and any other documents more easily.

Tip: When working with two or more documents on the same screen, the one that appears on the top (or the left) is the one you're viewing when you go to *Window* to make your comparison choices.

Check Heading Levels

It's an editor's (and a proofreader's) job to verify that all headings are handled consistently, both in formatting and wording. For example, your document style might require level 1 headings to be in all caps, set on their own lines, and worded as commands, and level 2 headings to be in bold italic, run into the text, and worded as questions. If your document is styled with Word's template styles (*Heading 1*, *Heading 2*, etc.), there's an easy way to check them for consistency.

Go to *View > Outline*, and your document will switch to *Outline View*. More important, the *Outline* toolbar will appear.



On the *Show Level* drop-down menu, you can choose to view all the headings in your document or only the heading levels you choose. Using this tool, you can quickly review your headings—with no distractions—to be sure they are as they should be.

Returning Finished Files

When you finish editing electronic files, and it's time to send them into the ether, they might be a little *large*. (That goes for *all* electronic files, such as PDFs and PowerPoints, as well as Word files.) Large files can make upload times long and e-mail servers cranky. Some e-mail programs compress files automatically, but some don't. If you fear your file is a beast, or you have several files to send, run it (or them) through a compression utility like WinZip or ZipIt. Then attach the streamlined version to your message.

And as a last step, always open your attached file *from* your e-mail message just before you send it, to be sure you've really attached the right thing. It can save so much confusion (take it from people who *know*).

Editing in Word—A Quick Reference

Word has a dizzying array of options, but the ones you'll use most as you edit can be pared down to a relative few. Here's a brief guide to working with Word's primary editing tools:

- **To turn Track Changes on or off:** Click the Track Changes button on the Reviewing toolbar, double-click TRK at the bottom of the screen, or press Ctrl+Shift+E.
- **To set markup options:** On the Reviewing toolbar, go to Show > Options and choose colors and styles for different types of changes.
- **To turn balloons on or off:** On the Reviewing toolbar, go to Show > Balloons and choose Always if you want to use them for all your changes, Never if you don't want to use them, or Only for Comments/Formatting if that's your preference. You can also choose balloon settings under Show > Options.
- **To set how changes are viewed:** On the Display for Review toolbar, choose Final Showing Markup while you're working, to see changes as you make them, and Final when you do your final reading, to get a clean view of the finished product.
- **To insert new text:** With Track Changes on, place your cursor where you want the new text, and start typing.
- **To delete text:** With Track Changes on, place your cursor at the start of the text you want to delete and hold down the Delete key.
- **To add a comment:** Place your cursor at the spot in the text where you want to insert a comment, then go to the Reviewing toolbar and click Insert Comment. If you're using balloons, one will appear, and you can type your remarks in it. If



you're not using balloons, the Reviewing Pane will open; type your comment there. To close the Reviewing Pane, click the Reviewing Pane button in the Reviewing toolbar. (If you want to bypass Word's commenting tool and just type your remark directly in the text, it's a good idea to set it off with something like double braces or asterisks to make searching for comments easy.)

- **To remove a comment:** If you're using balloons, highlight the balloon that contains the comment you want to remove and click the Reject Change/Delete Comment button in the Reviewing toolbar. If you're not using balloons, highlight the comment number bracketed in the text and press Delete, or click the Reject Change/Delete Comment button in the Reviewing toolbar. (Naturally, if you've typed a comment directly in the text, just use the Delete key.)
- **To accept or reject changes:** Step forward through marked changes by clicking the Next button on the Reviewing toolbar. Step backward through them by clicking the Previous button. To accept a change, make sure it's highlighted, then click the Accept Change button. To reject one, click the Reject Change/Delete Comment button. Be *very* leery of choosing an Accept All or Reject All option.
- **To search:** Use the Find function under the Edit menu. Narrow your search with the options under the More button. Go to the Replace tab to automatically replace text once it's found (but be *very* leery of choosing Replace All).
- **To work with a split screen or multiple documents:** Go to Window and choose Split to create two independent halves of a single document; choose Arrange All to see and work with multiple documents on the screen at the same time; and choose Compare Side by Side with... to see and work with two documents side by side.
- **To spell-check your document:** Place the cursor at the beginning of the document and click the Spelling and Grammar button on the Basic toolbar.

Handy Keyboard Shortcuts

The Word menu options include some keyboard shortcuts, and the Help menu has many more. For your convenience, here's a list of some keys that can save you time and mousing. (Note: If you're working on a laptop or a keyboard with a nonstandard configuration, in a few cases you might need to use different keys.)

| | |
|---------------------|--------|
| Center a paragraph | Ctrl+E |
| Close | Ctrl+W |
| Copy | Ctrl+C |
| Create new document | Ctrl+N |

| | |
|-------------------------------|----------------------------------|
| Cut | Ctrl+X |
| Find | Ctrl+F |
| Go to | Ctrl+G |
| Help | F1 key |
| Insert a comment | Alt+Ctrl+M |
| Insert an em dash | Alt+Ctrl+minus sign (not hyphen) |
| Insert an en dash | Ctrl+minus sign (not hyphen) |
| Justify a paragraph | Ctrl+J |
| Left-align a paragraph | Ctrl+L |
| Open | Ctrl+O |
| Paste | Ctrl+V |
| Print | Ctrl+P |
| Print Preview | Ctrl+F2 key |
| Repeat an action | Ctrl+Y |
| Replace | Ctrl+H |
| Right-align a paragraph | Ctrl+R |
| Save | Ctrl+S |
| Save As | F12 key |
| Spelling and Grammar | F7 key |
| Split (screen) | Ctrl+Alt+S |
| Thesaurus | Shift+F7 key |
| Turn track changes on and off | Ctrl+Shift+E |
| Undo an action | Ctrl+Z |

*If you liked this job aid, but would like a slightly condensed version full of pointers on the basics and nice-to-know extras, see **Tips for Working with Microsoft Word Documents—Basic**, and for quick help, see the **Quick Help** version. For even more help in the world of words, see our entire set of easy-to-use [Job Aids for Effective Communication](#) that give you quick, clear guidance as you prepare anything from a memo to a manual to a web page.*

