Getting Word to show you some Love ❤️

Word for Technical Communicators
Instructional Design & Learning SIG, a community of practice
February 19, 2021

with Mellissa Ruryk

Speaking Today

Mellissa Ruryk, B.Ed. Sec. (English and Art)

- Facilitates "Advanced Word for Technical Writers" adult education course for Simon Fraser University

- Was a WordPerfect maven until version 3.1... MS Word power user since then. Still says "hard return."

- Freelance technical writer/editor for 25+ years

- STC & IDL member since 2005

- Longtime volunteer with IDL and Technical Editing SIGs and Alberta and Canada West Coast chapters

Who are you?

- You use Word and you're good at it!

- Word is what's available in your office, so you use it, grudgingly

- You use Word almost exclusively but it drives you crazy

- Word scares you – you're never sure what it's going to do next

- You use Word a lot but you suspect "there *must* be an easier way!"

Outline of Topics Covered

Setting Up for Success

- Customizing your Word territory
- Nav pane, shortcuts, Options

Editing Others' Mistakes

- Find and Replace tips
- Text→ table, Table → text

How Do We Fix This?

- Captions
- Cross-referencing
- "Same as Previous" headers and footers

What's not in this session

- Creating a template

- Bullet-proof numbering

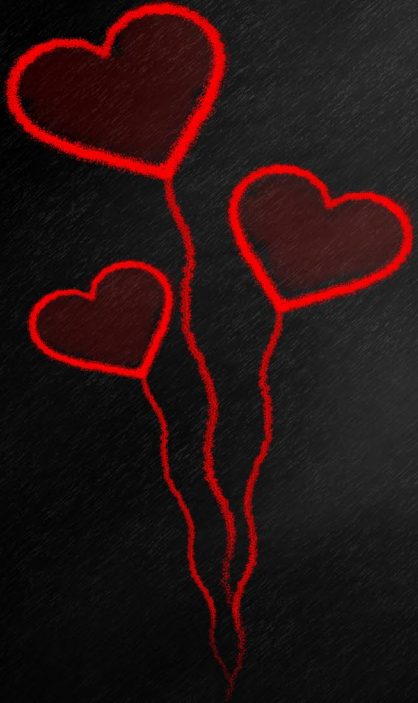These follow-on sessions are planned for later in 2021 and early 2022
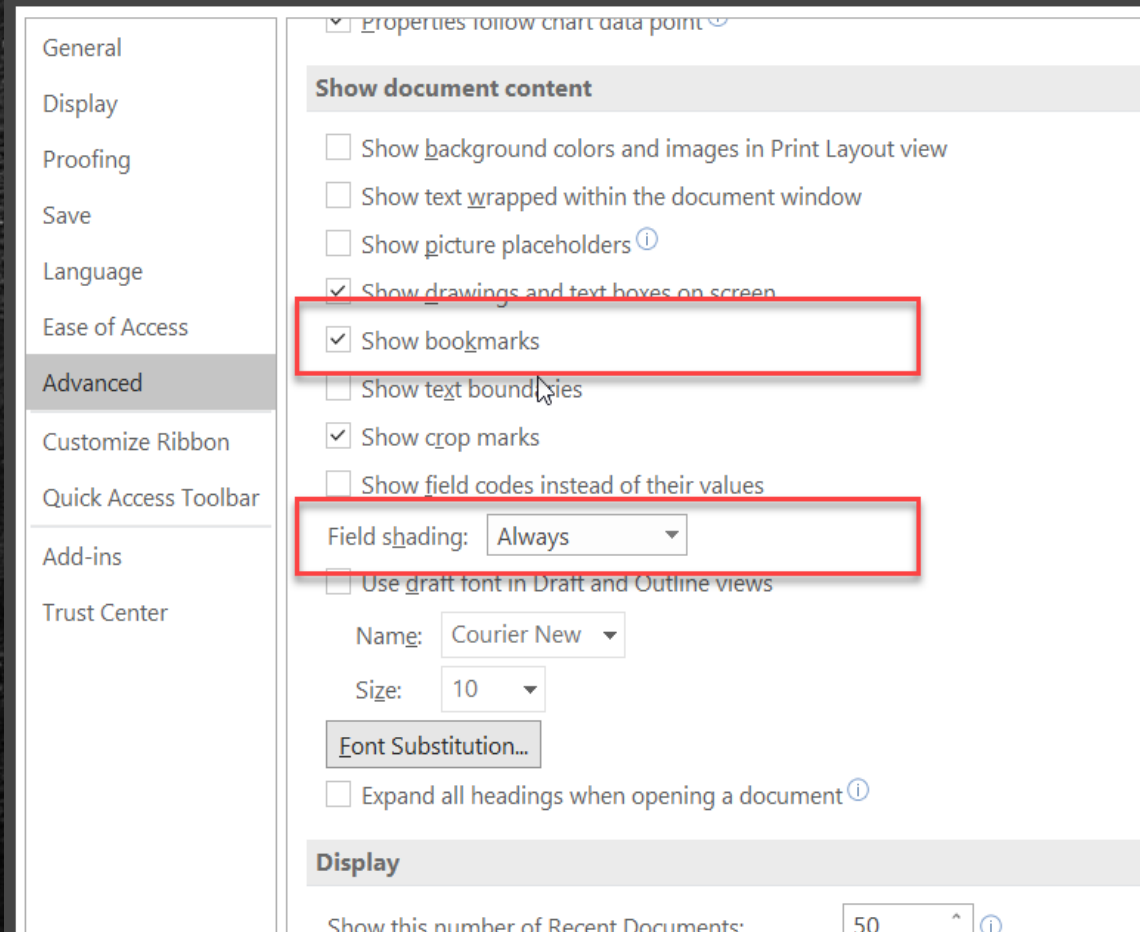
SETTING UP FOR SUCCESS

Word is set up for the average user: but we technical writers are anything BUT average...

Field Shading and Bookmarks

- Access Word Options

File>Options>Advanced>Display

- Select *Show Bookmarks*

- Set *Field Shading* to *Always*

Field Shading and Bookmarks

Field Shading and Bookmarks
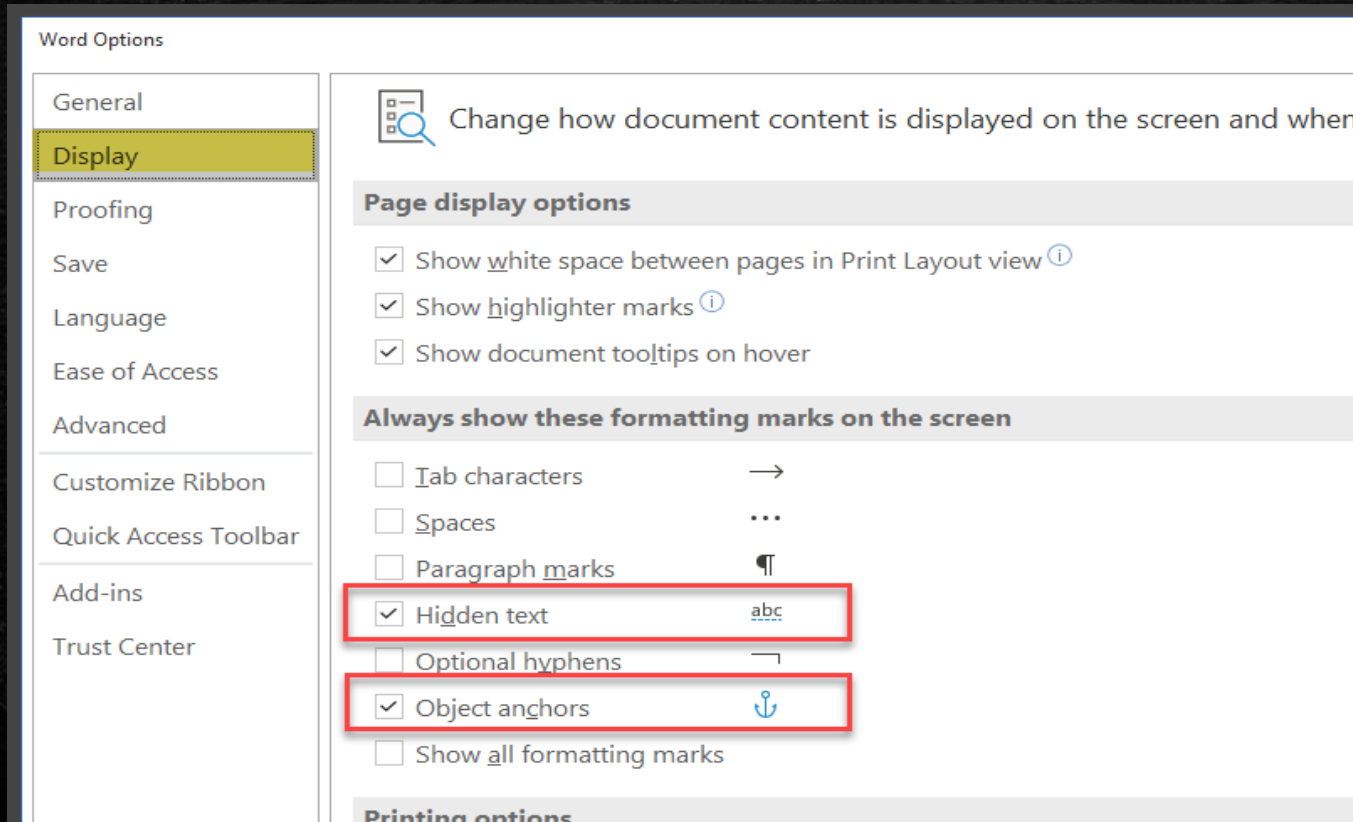

- Square brackets show you where a bookmark is

- All fields (such as page number here) show with a grey background

- To update all fields in your document at once, press Ctrl-A (select All), then press F9 (update fields)

Hidden Text and Object Anchors


- Access Word Options

File>Options>Advanced>Display

- Locate Always show these formatting marks on the screen

- Select *Hidden Text* and *Object Anchors*

Hidden Text

> This is hidden text. A grammar issue was highlighted. Here is a spelling misteak.

- Hidden text appears underlined with faint green dots

- Contrast to the heavier blue dotted underline for grammar issues or the heavier red squiggle under a spelling mistake

- *Best practice to create a style for hidden text with a distinctive text color (and hidden text attribute)–makes it easier to see*
  - *Applying the style turns on the hidden text and changes font color at the same time*
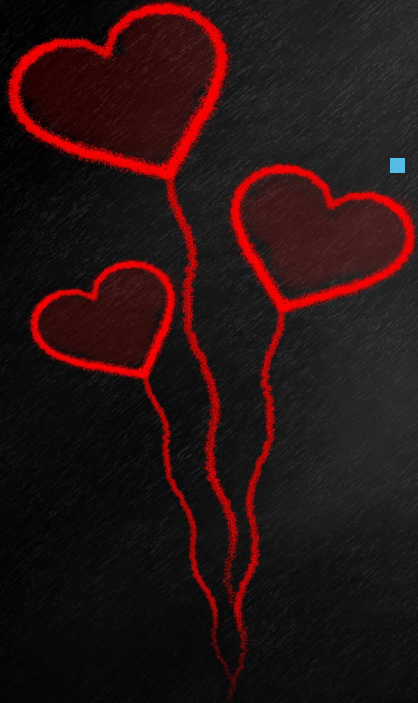
Object Anchors
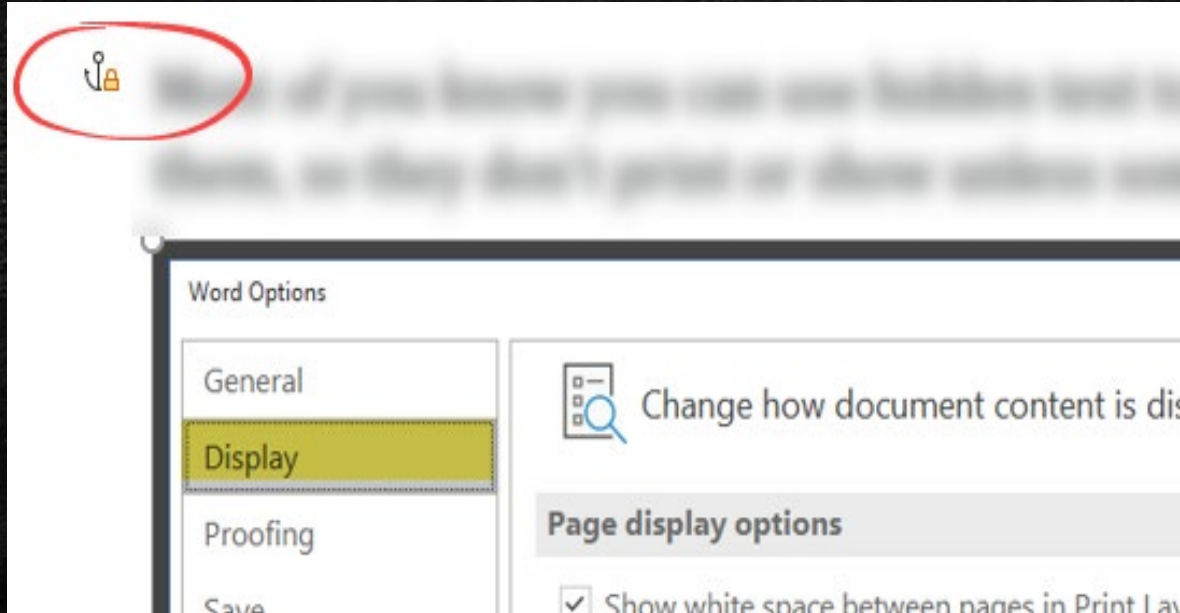
- Anchors only appear when text wrap for image is set to anything but *In Line with Text*

- Anchors are attached to a paragraph on the *Text Layer*. Moving or deleting that paragraph affects the image

- Find the Anchor Lock:
  - *Select image and right-click*
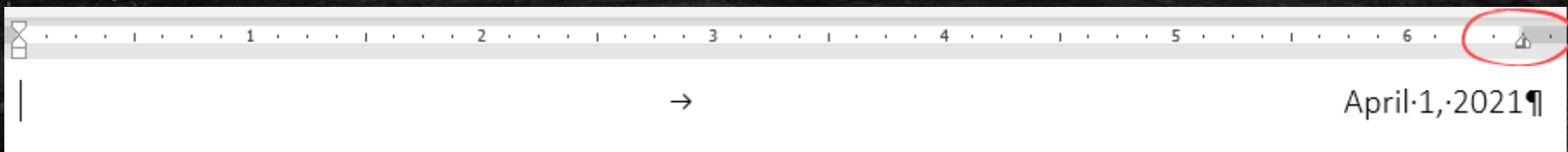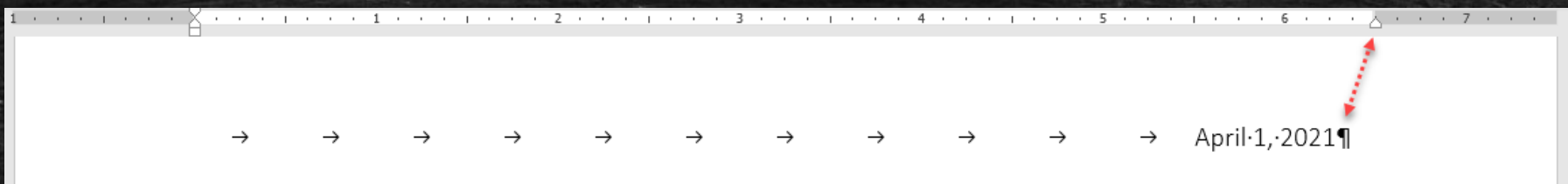 - *Select More Layout Options > Position tab > look in lower left corner*

All About Tabs

TAB STOPS

- Using Tab to reposition text betrays you & never aligns correctly

- It's easy to set and use tabs using the ruler

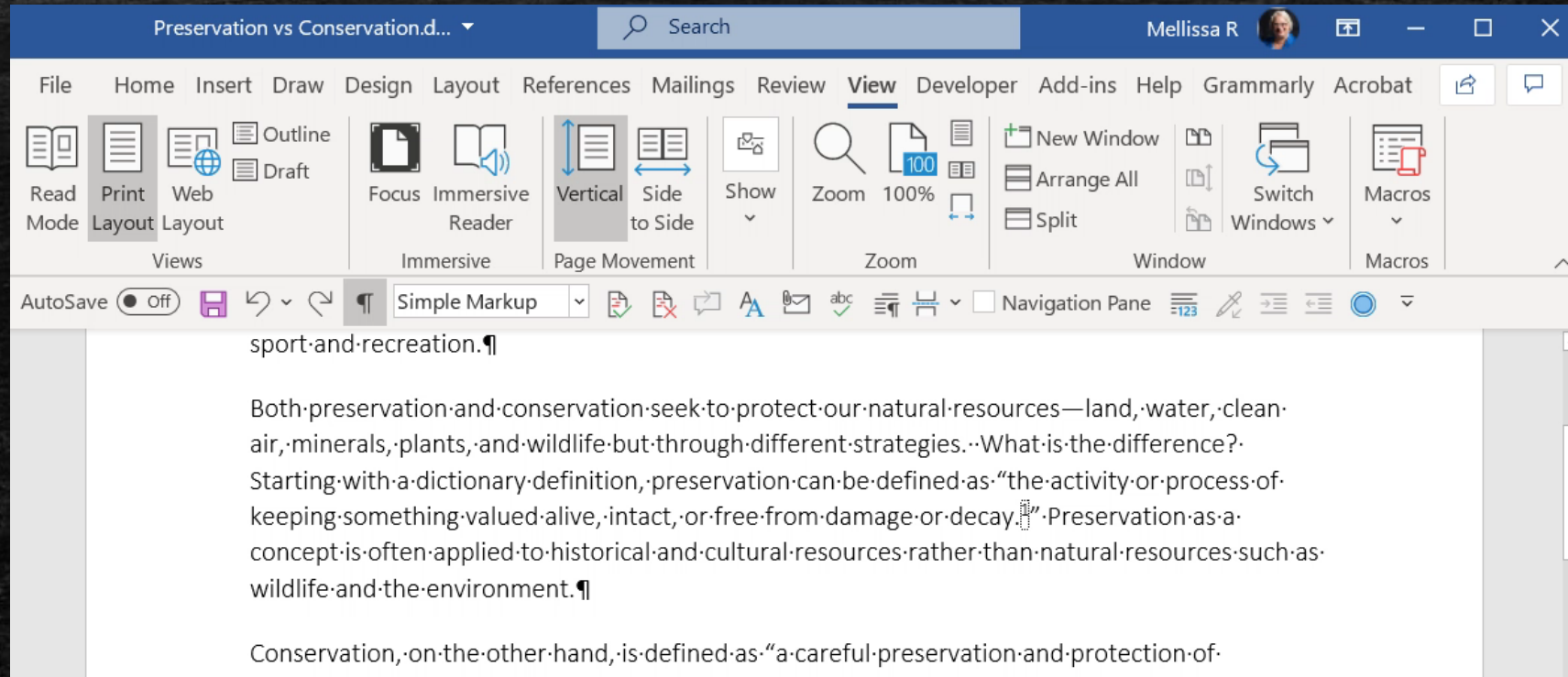# Use the Ruler to Set Tabs Quickly

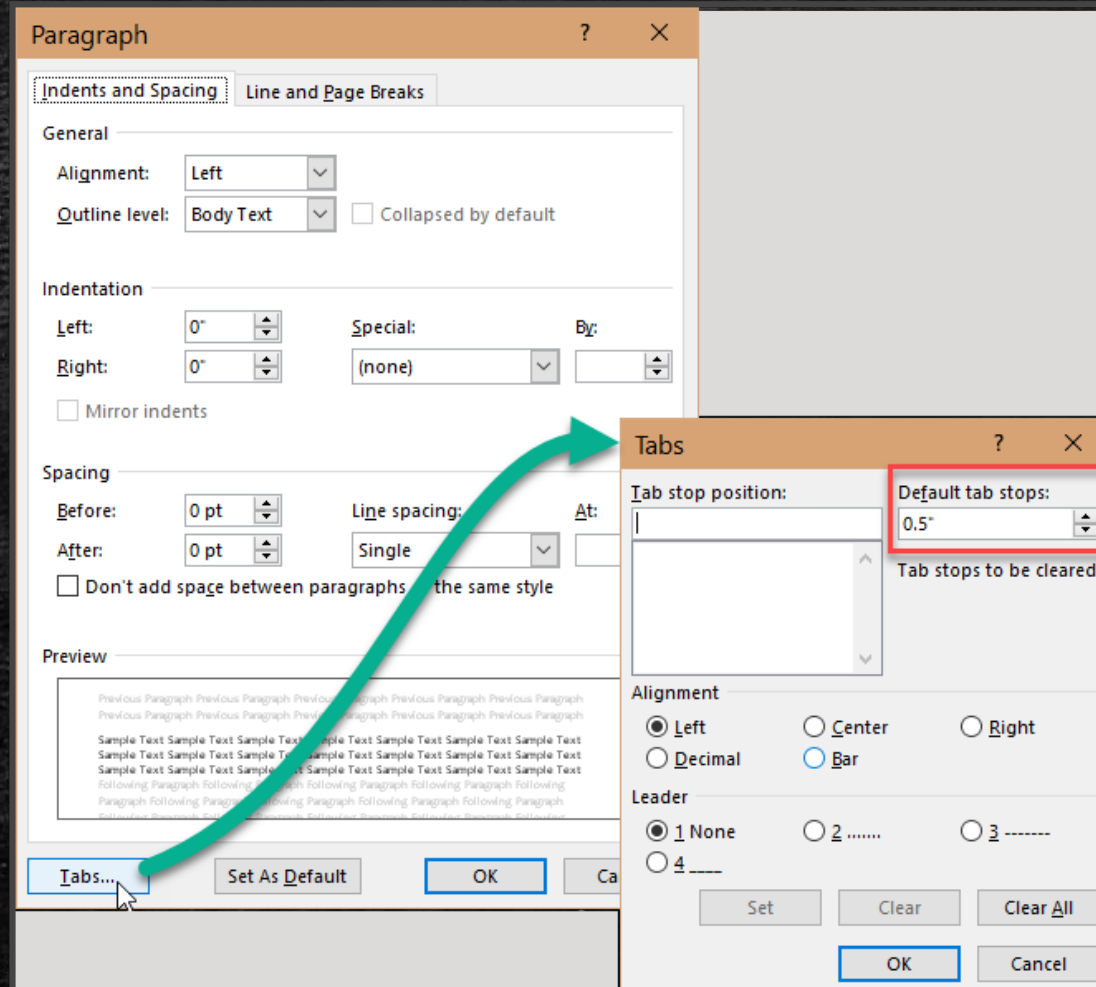Left-aligned

Center-aligned

Right-aligned

Decimal-aligned

Bar tab

Preservation vs Conservation.d... ▾   Search   Mellissa R

File   Home   Insert   Draw   Design   Layout   References   Mailings   Review   View   Developer   Add-ins   Help   Grammarly   Acrobat

Read Mode   Print Layout   Web Layout   Outline   Draft | Focus   Immersive Reader | Vertical   Side to Side | Show | Zoom   100% | New Window   Arrange All   Split | Switch Windows | Macros

Views   Immersive   Page Movement   Zoom   Window   Macros

AutoSave ● Off | Simple Markup | Navigation Pane

sport·and·recreation.¶

Both·preservation·and·conservation·seek·to·protect·our·natural·resources—land,·water,·clean· air,·minerals,·plants,·and·wildlife·but·through·different·strategies.··What·is·the·difference?· Starting·with·a·dictionary·definition,·preservation·can·be·defined·as·"the·activity·or·process·of· keeping·something·valued·alive,·intact,·or·free·from·damage·or·decay."·Preservation·as·a· concept·is·often·applied·to·historical·and·cultural·resources·rather·than·natural·resources·such·as· wildlife·and·the·environment.¶

Conservation,·on·the·other·hand,·is·defined·as·"a·careful·preservation·and·protection·of·
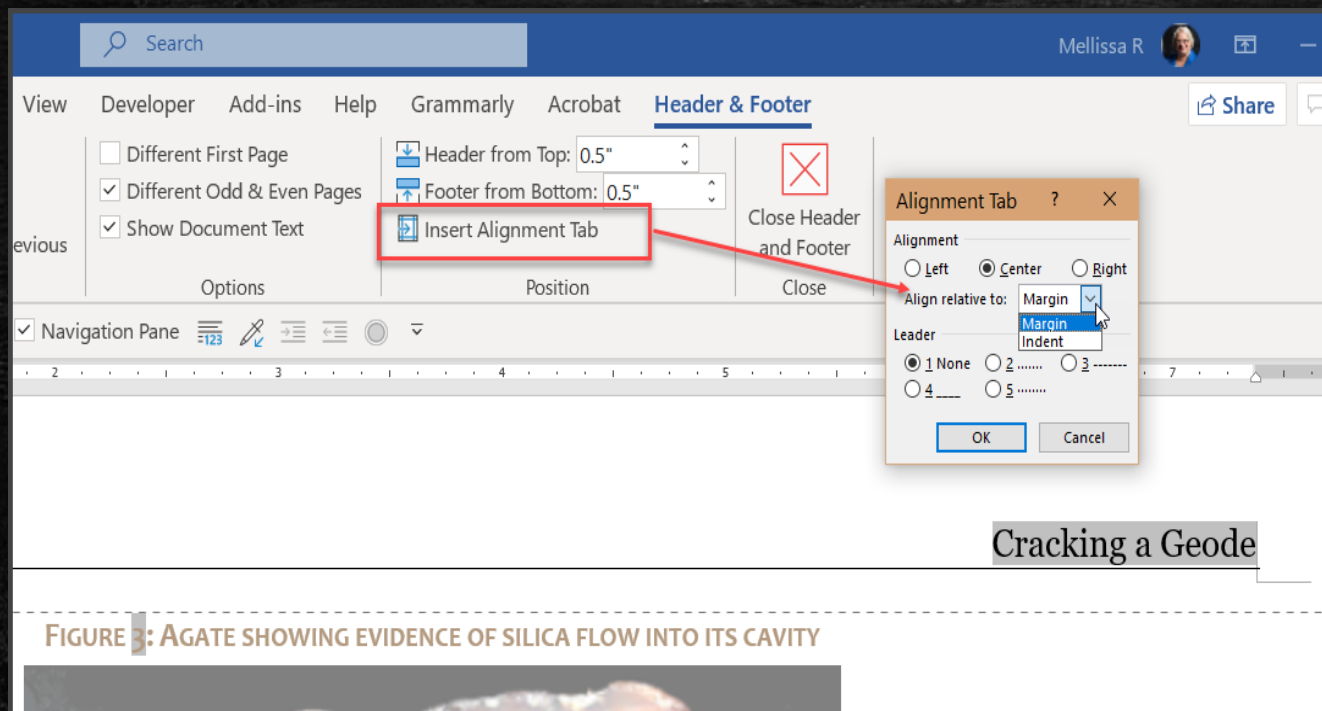
Default Tab stops

- Default tab stops don't show on the ruler
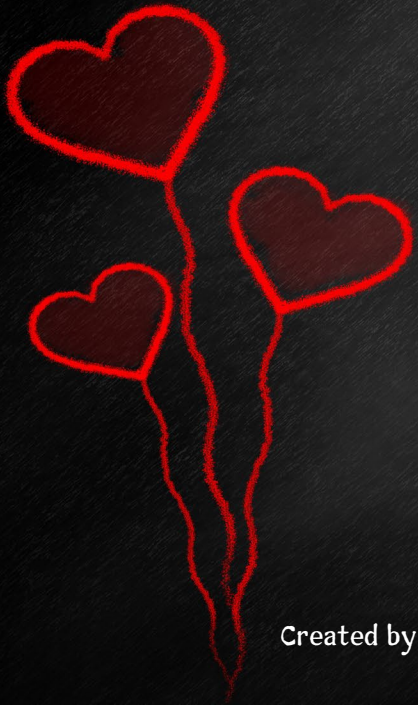
ALIGNMENT TABS

- Alignment tabs don't show on the ruler

- They stay in alignment regardless of page size or orientation

Doubleclick in the header or footer area to open the Header/Footer dialog

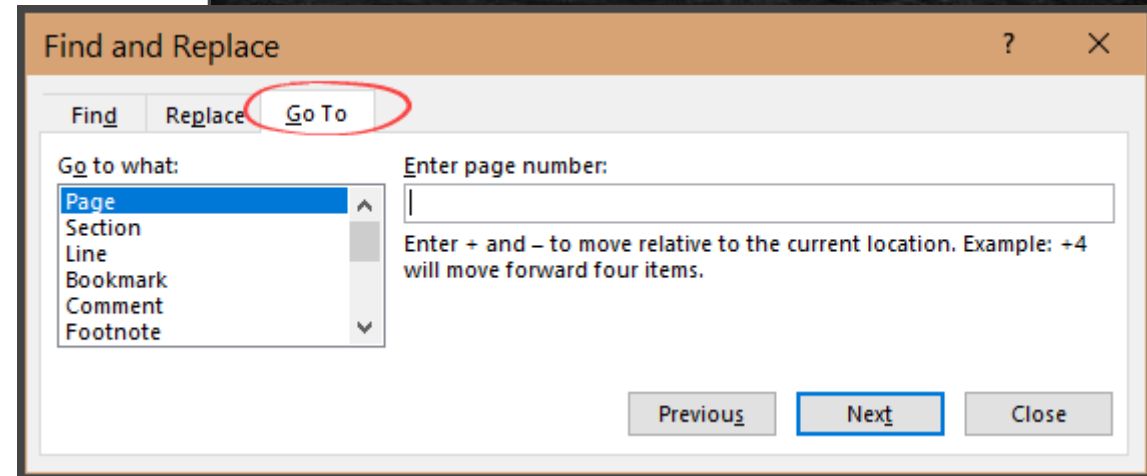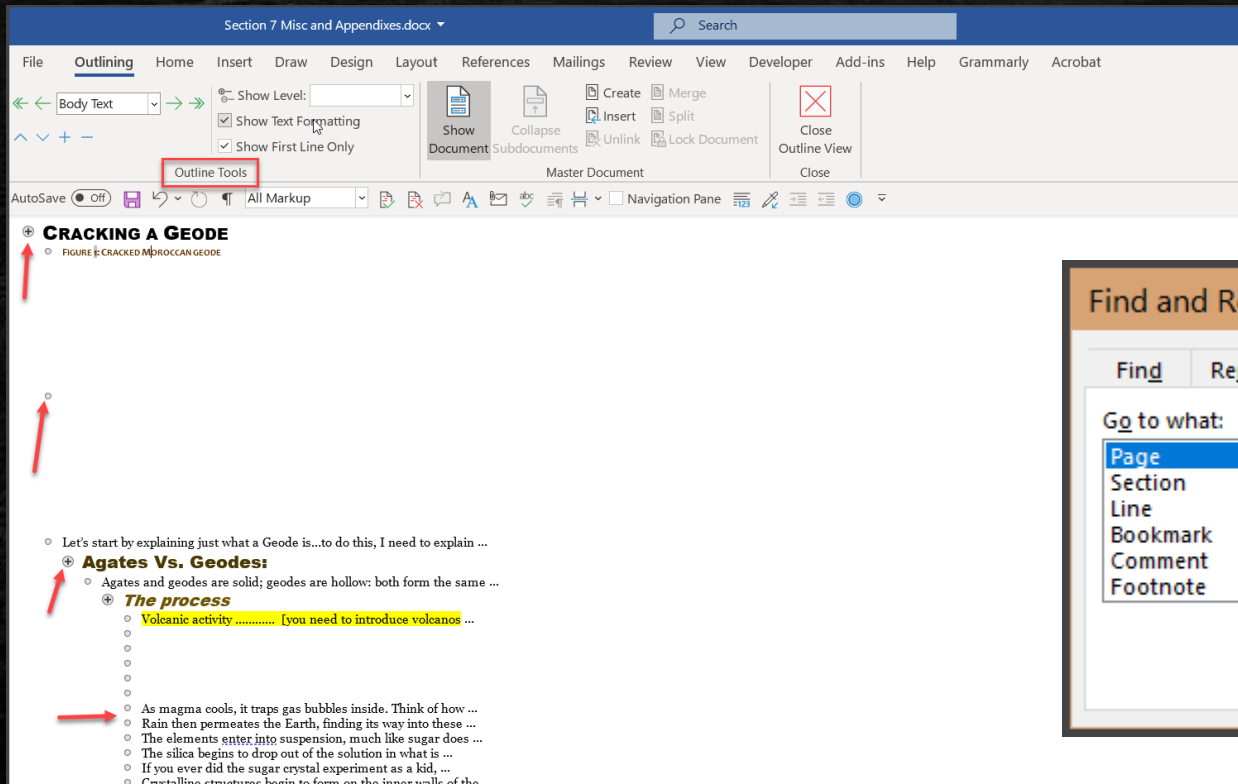- Select left, center, or right alignment *in relation to* margin or indent
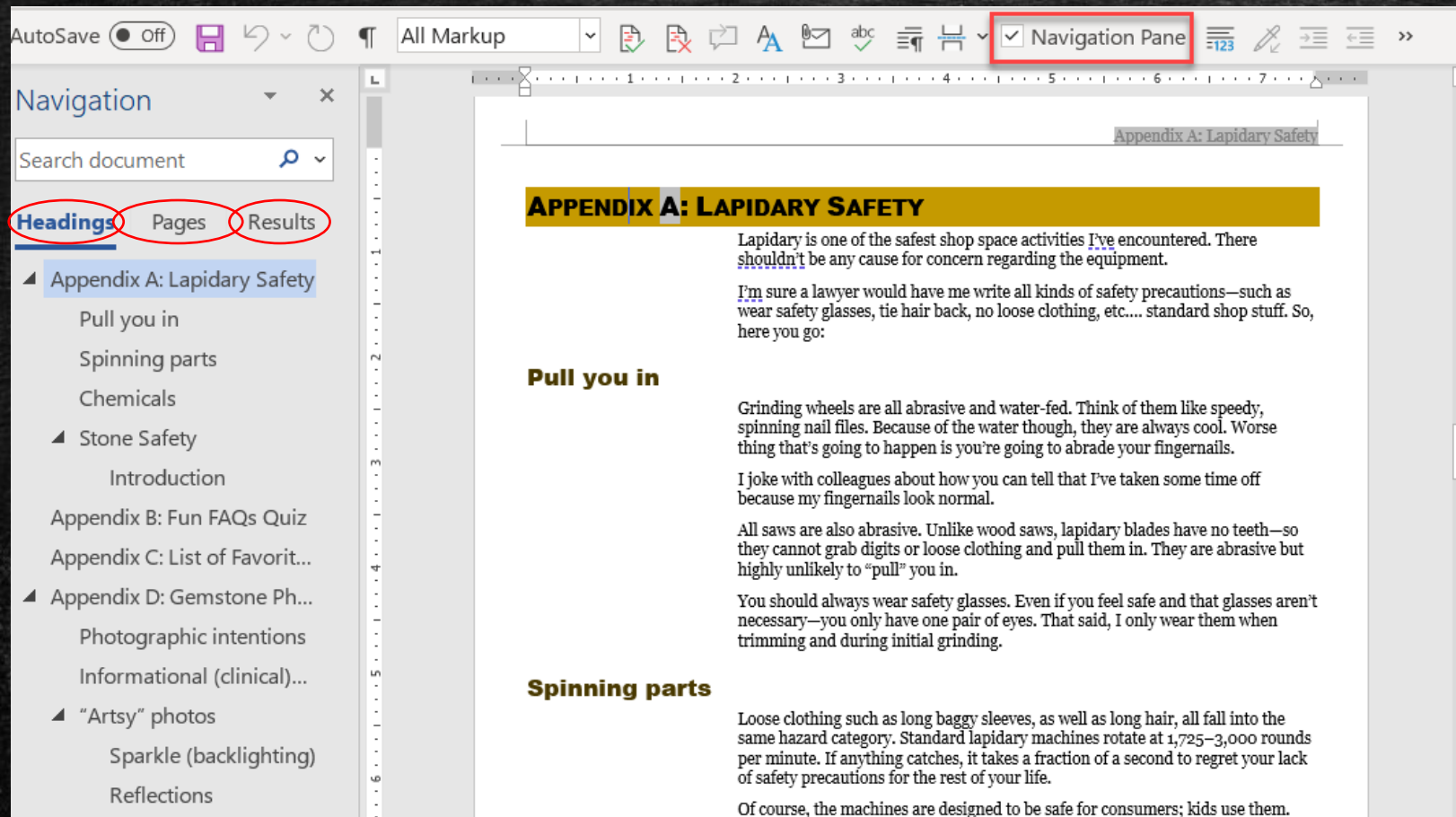
Learn to Love the Navigation Pane

LEARN TO ❤ THE NAVIGATION PANE

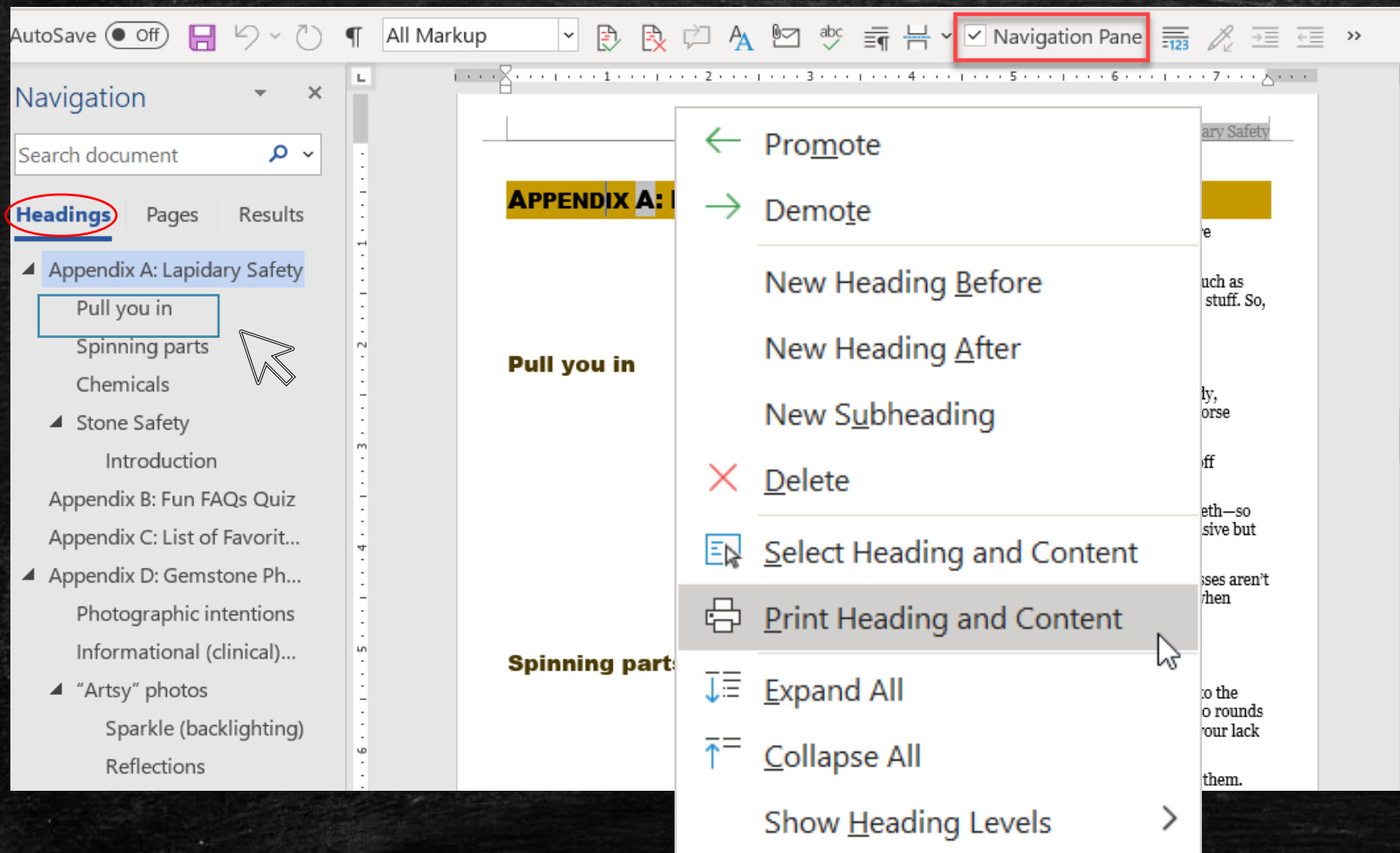*Outline View* and *Go To dialog* still work, but there's a skookum upgrade

LEARN TO ❤ THE NAVIGATION PANE

- Access the Nav pane from the View menu

- Or, customize your quick access toolbar to let you turn it on or off quickly

- *Note the 3 tabs – Headings, Pages, Results*
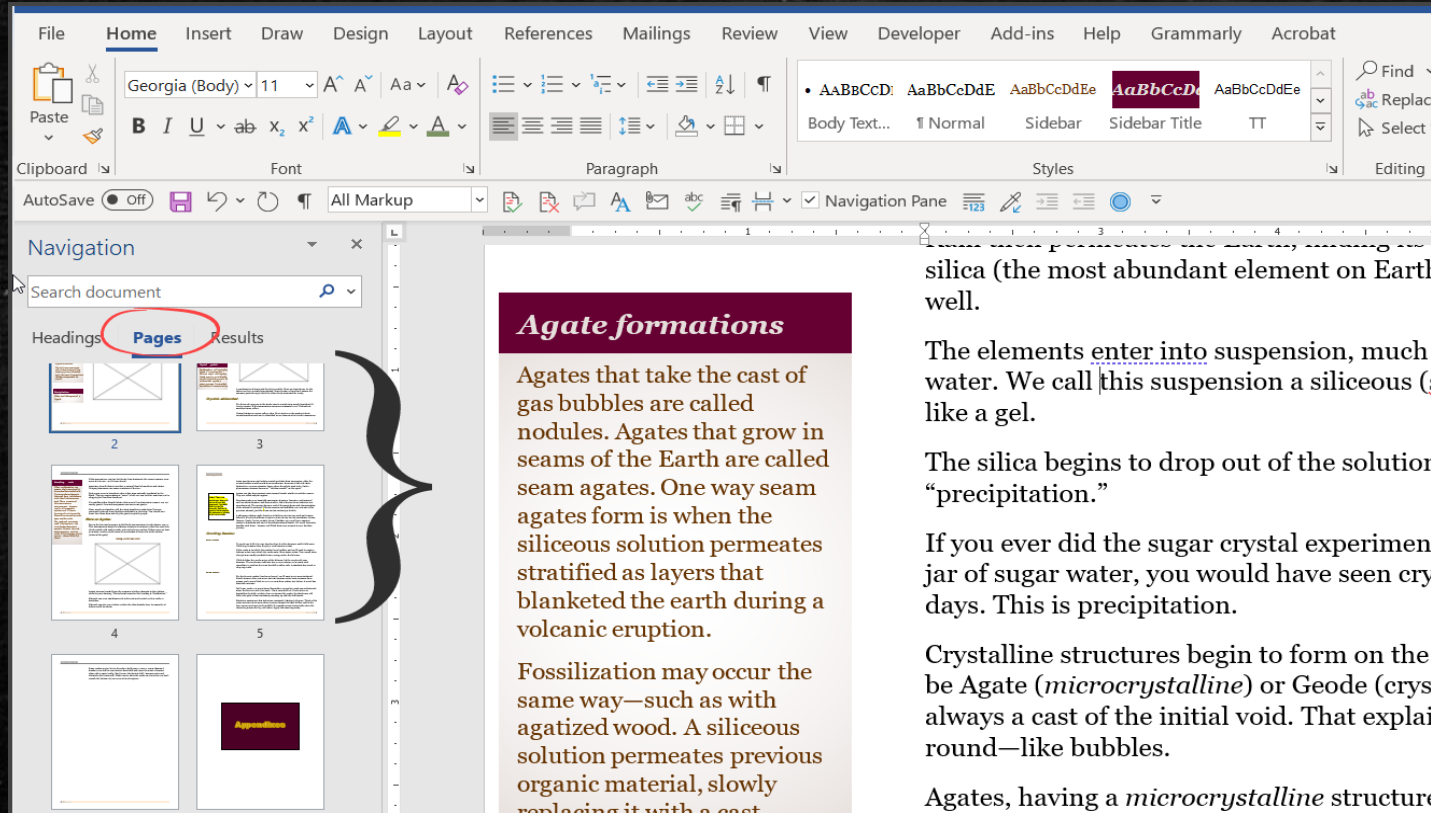
LEARN TO ♥ THE NAVIGATION PANE

- See doc structure and doc content at the same time, with formatting

- Move content around without fuss

- *Promote or demote sections (and more) with a single right-click*

Nav Pane—Pages Tab

- I use this view to check for layout issues

- Resolution of the images is fixed but you can resize the Nav pane to see 1, 2, or 3 pages at a time

- Click a page to move your cursor there

Nav Pane–Results Tab
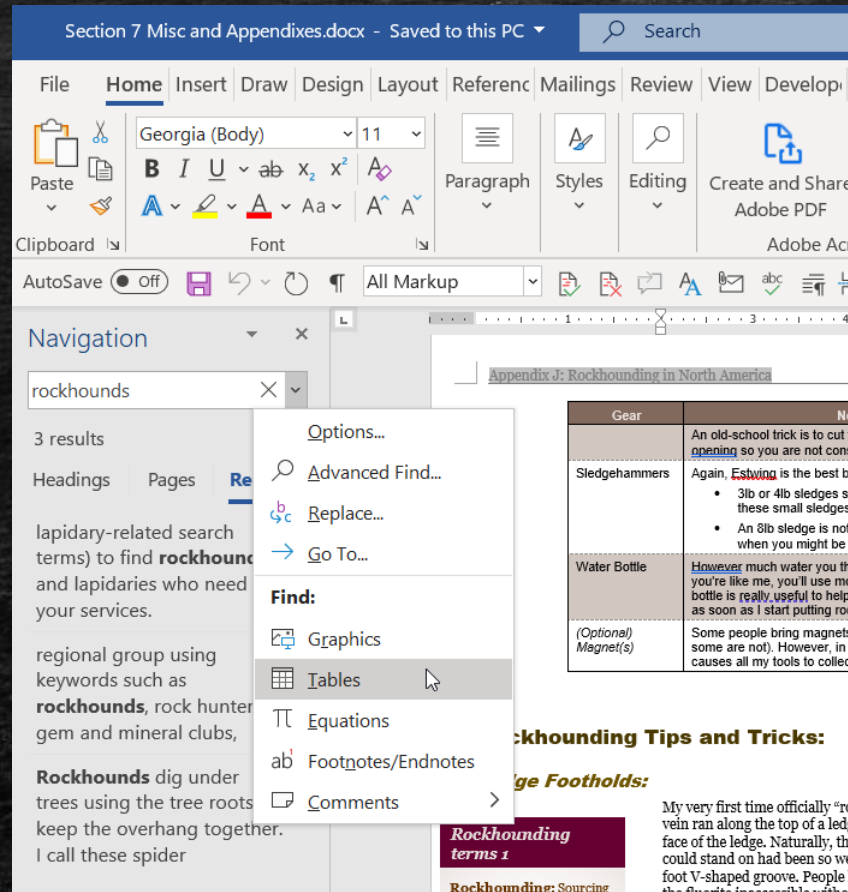

- Shows a count of results

- Easily move from one result to the next using the arrows

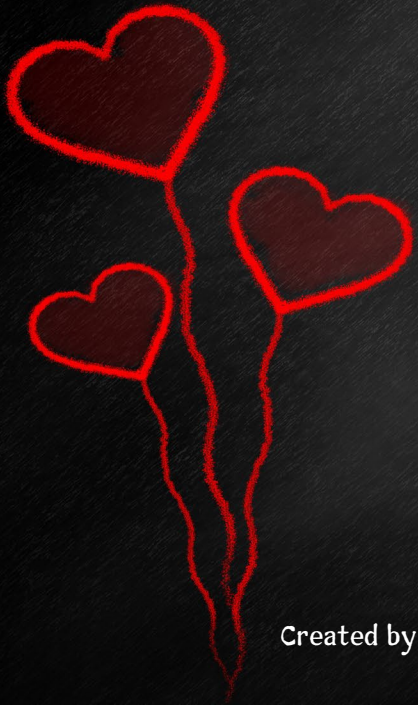- Right click down arrow by search field to see additional options

Nav Pane–Results Tab

- Find and quickly move from one object (graphics, tables, footnotes, etc.) to the next
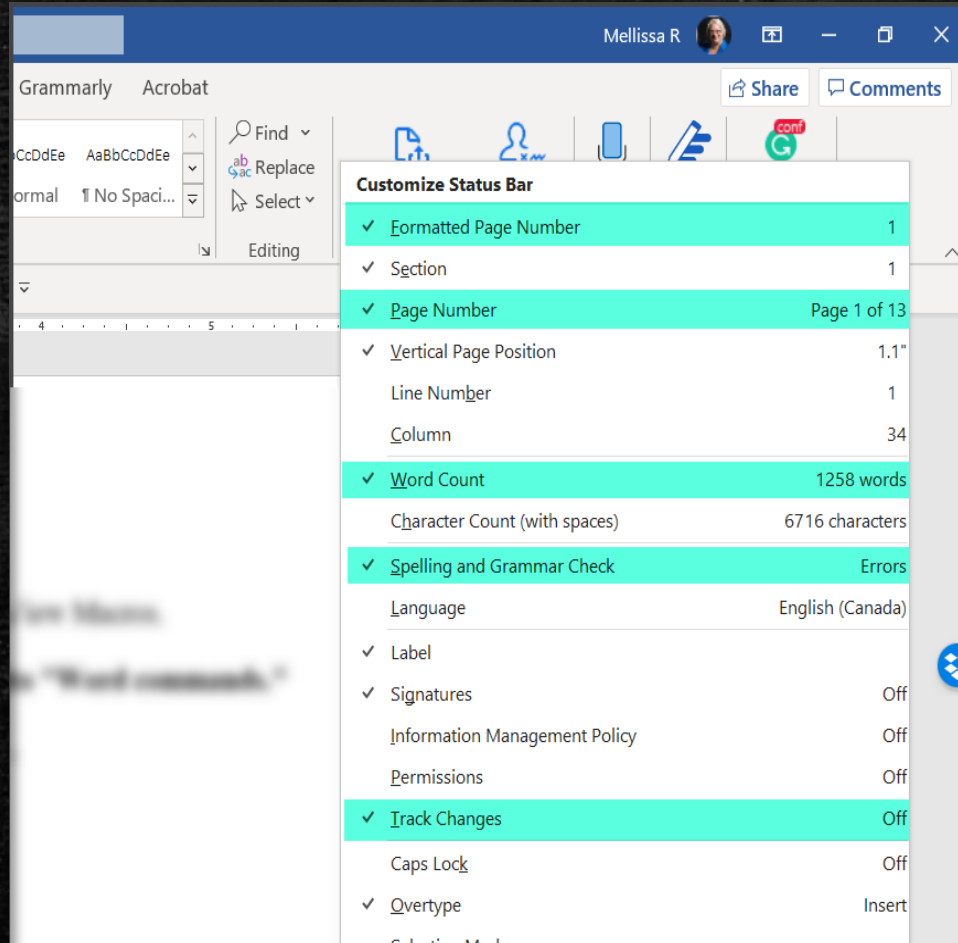
Customize your Status Bar & QAT

Customize the Status Bar

Customize Status Bar

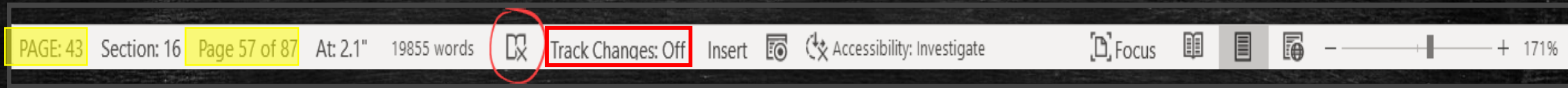|		
✓	Formatted Page Number	1
✓	Section	1
	Page Number	Page 1 of 13
✓	Vertical Page Position	1.1"
	Line Number	1
	Column	34
✓	Word Count	1258 words
	Character Count (with spaces)	6716 characters
✓	Spelling and Grammar Check	Errors
	Language	English (Canada)
✓	Label	
✓	Signatures	Off
	Information Management Policy	Off
	Permissions	Off
✓	Track Changes	Off
	Caps Lock	Off
✓	Overtype	Insert
	Selection Mode	

- Use the Status bar to increase your productivity by eliminating keystrokes

- My most-used are highlighted

Right click on the status bar at the bottom of your window
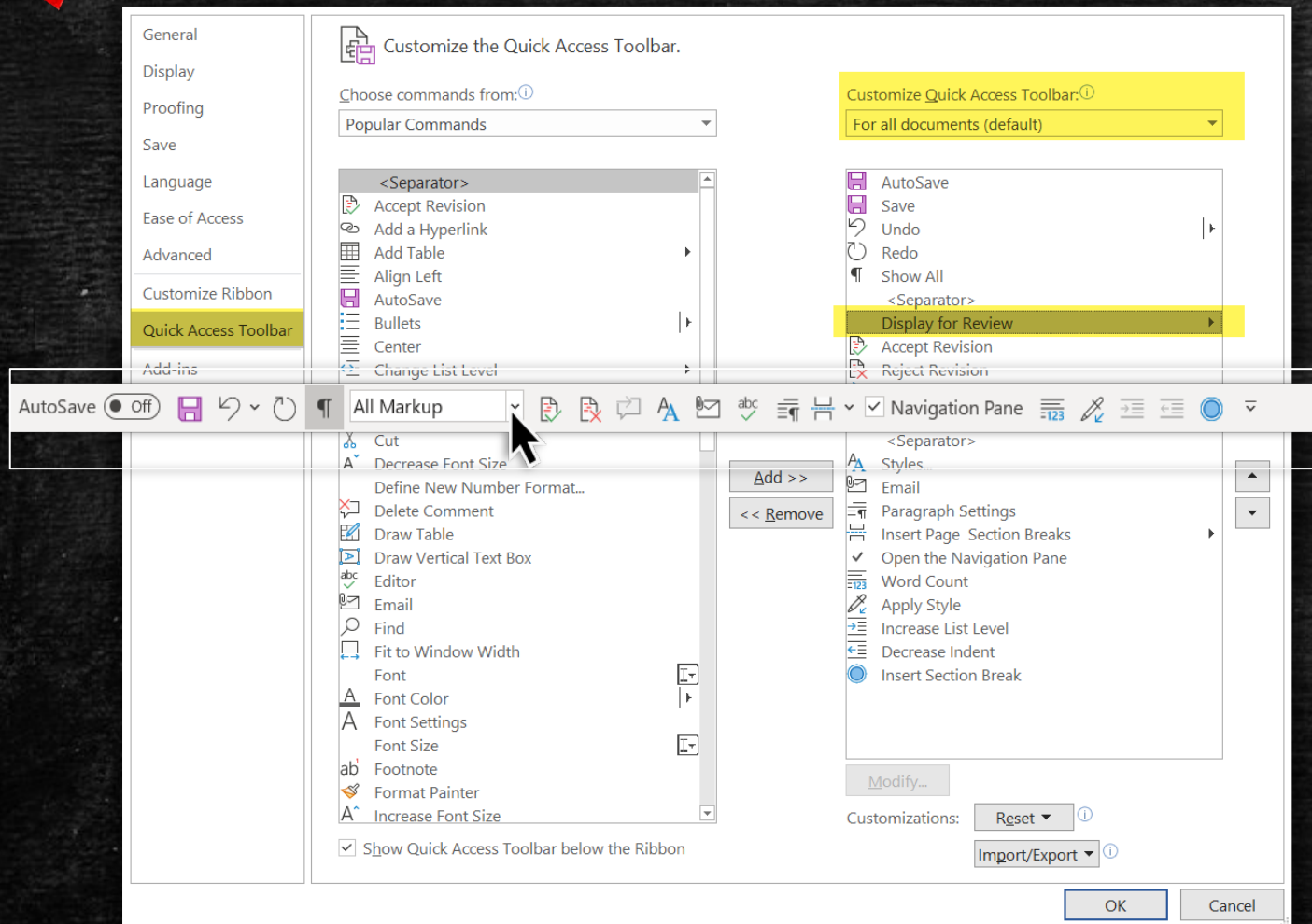
Status Bar Customizations

PAGE: 43 | Section: 16 | Page 57 of 87 | At: 2.1" | 19855 words | Track Changes: Off | Insert | Accessibility: Investigate | Focus | 171%

- *Note 2 different page counts–handy for printing*
  - *You'll get a Resources page after the presentation; see hyperlinked article (but remember how easy printing from Nav Pane is...)*

- Word Count given for entire doc or selection

- Editor issues in grammar or spelling are indicated by X on book icon
  - Open the Editor by double clicking that icon

- Favorite new addition is Track Changes toggle on/off

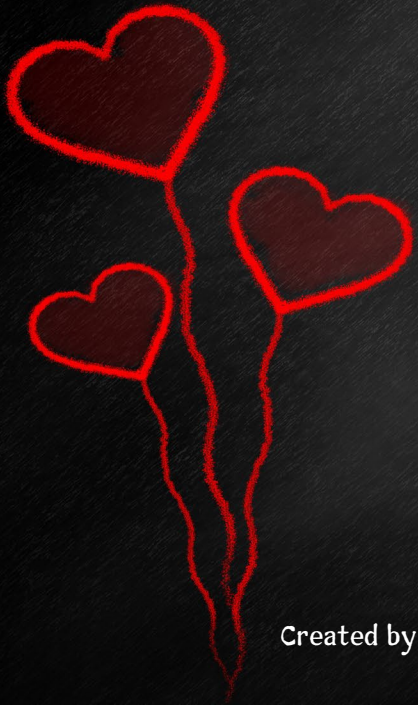# Customize the Quick Access Toolbar (QAT)

File > Options > Quick Access Toolbar

- To match the Track Changes toggle in the status bar, I added Display for Review (same options):
  - Simple Markup
  - All Markup
  - No Markup
  - Original

- Quick Access Toolbar can be pinned above or below the ribbon

Autocorrect

Autocorrect

- Click the Autocorrect Options button to open the dialog

- Enter exceptions to Autocorrect

- Use options to set exceptions for items such as ToC, TCBoK, etc.

- If you haven't looked at Word's Grammar refinements lately, they've been greatly improved.

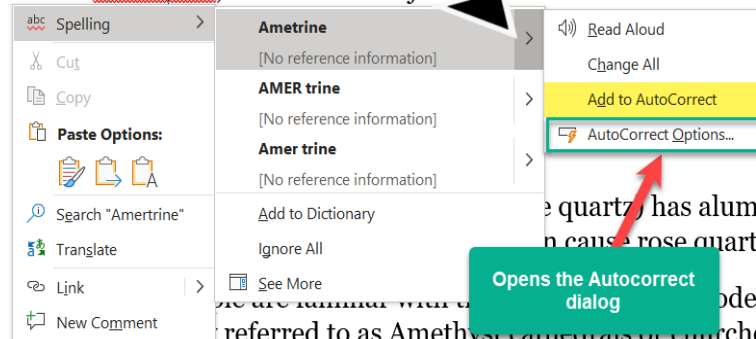# Adding to Autocorrect With Spellcheck

- I went more than a year thinking Word had removed the ability to add a correction while spellchecking...

- Note the ability to open the Autocorrect dialog (last slide) from here

Editing Others' Mistakes

This section offers strategies for editing other people's Word documents... they can be, uh... "messy"

Created by Mellissa Ruryk for Instructional Design & Learning SIG/COP of STC

Find and Replace

Find and Replace special characters
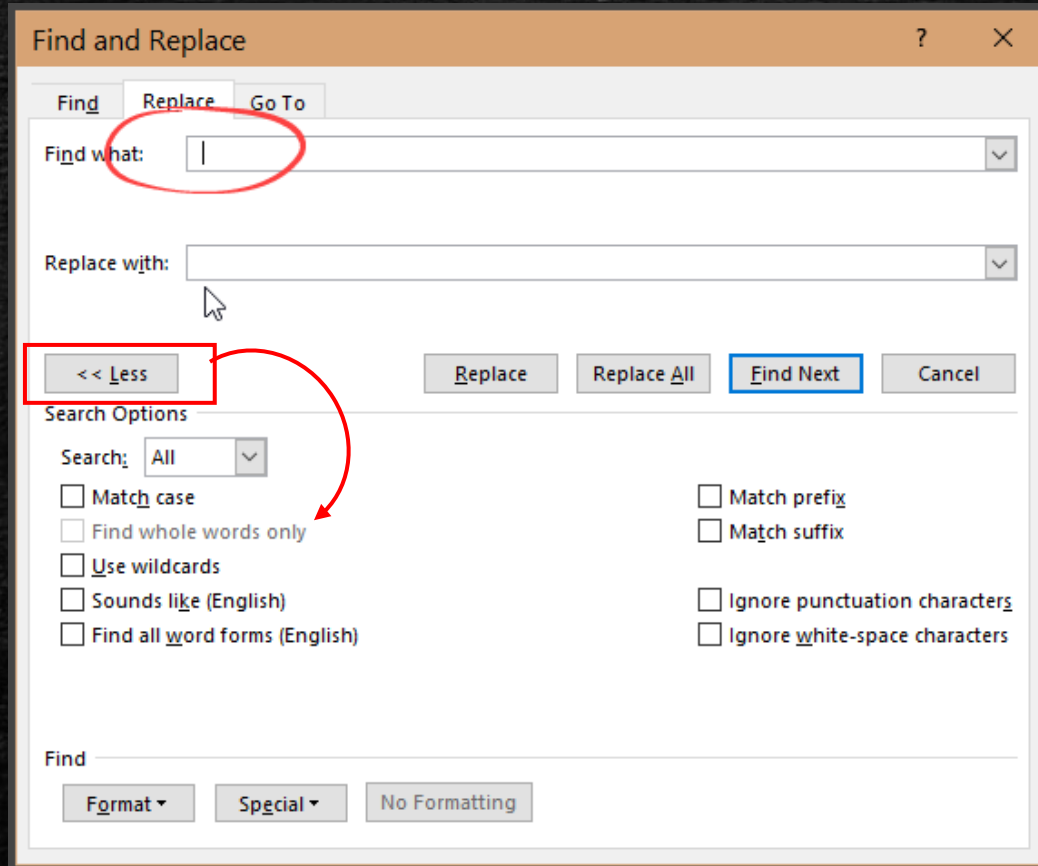
Home>Editing>Replace

- Turn off Track Changes for wholesale changes like this

- Replace 2 spaces with 1

- Repeat until 0 replaced

Find and Replace other than words

Home>Editing>Replace

- Replace 2 paragraph marks with 1

- Repeat until 0 replaced
  - ^p = paragraph
  - ^t = tab
  - ^l = manual line breaks
  - ^m = manual page breaks
  - ^b = section break

- *Use only lower-case letters*

Special Characters

Paragraph Mark
Tab Character
Any Character
Any Digit
Any Letter
Caret Character
§ Section Character
¶ Paragraph Character
Column Break
Em Dash
En Dash
Endnote Mark
Field
Footnote Mark
Graphic
Manual Line Break
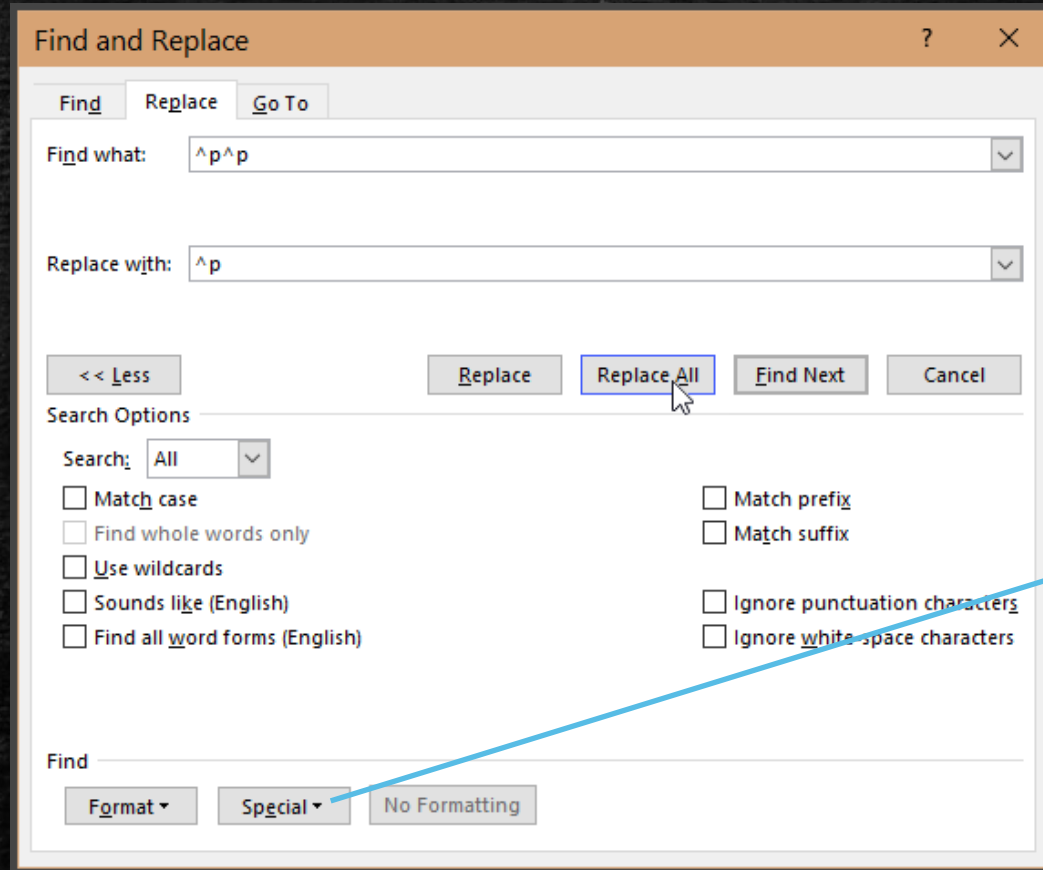Manual Page Break
Nonbreaking Hyphen
Nonbreaking Space
Optional Hyphen
Section Break
White Space

☐ Find all word forms (English)   ☐ Ignore white-space characters

Find

Format ▾   Special ▾   No Formatting

Home> Editing> Replace> More >>> > Special

If you can't remember the codes, click *Special* to see a list of what you can replace (without using wildcards)

▪ Using Wildcards presents different list

▪ *Check out Format choices*
  – *You can swap one Style for another*

Apply Styles

Reformatting Document with Styles

- Size of document and number of images

- Smaller doc, few/no images
  - Strip all formatting
    - Ctrl-End
    - Ctrl-A
    - Un-select last pilcrow
      - Keep shift key held, let go Ctrl, cick left arrow
    - Ctrl-C
    - Open Notepad or Notepad++
    - Ctrl-V, click anywhere to clear selection
    - Ctrl-A, Ctrl-C to copy entire contents
    - Ctrl-V in new doc

Why omit last pilcrow?

Don't copy corruption into new document.

Reformatting Document with Styles

- Size of document and number of images

- ## Larger doc, more/lots of images
  - If *all* formatted as Normal
    - Copy to new doc omitting last pilcrow
    - Ctrl-A
    - Strip all section breaks
    - Apply Body text Style
    - Re-apply Heading Styles where appropriate
    - Apply Image format to images
    - Apply table style to tables
    - Add captions to images and tables
    - Always configure section breaks before adding headers and footers, moving from the front of the document to the back
    - Generate ToC

- If there is a mix of different styles and manual formatting, use whatever you need to standardize and make styles consistent

- Reformat manually numbered (or bulleted) content with a neat trick: selecting text vertically.

SELECTING TEXT VERTICALLY IN WORD

Introduction¶
1.··Planning·and·Scheduling·your·Canning·Day¶
··1.1.··Participants¶
···1.1.1.··How·many·participants?¶
···1.1.2.··How·much·to·make?¶
···1.1.3.··Who·pays·for·what?¶
··1.2.··Setting·a·date¶
··1.3.··Location¶
2.··Equipment¶
··2.1.··Special·equipment¶
···2.1.1.··How·much·equipment·to·buy¶
···2.1.2.··Where·to·buy·equipment¶
···2.1.2.··Cost·of·equipment¶
··2.2.··Storage·of·equipment¶
3.··Ingredients¶
··3.1.··Ingredient·list¶
··3.2.··Preparation¶
···3.2.1.··Who·does·what·preparation¶
··3.3.··Health·benefits¶
4.··Process¶
··4.1.··Safety¶
··4.2.··Step-by-step·procedures¶
···4.2.1.··Washing¶
···4.2.2.··Straining¶
···4.2.3.··Cooking¶
···4.2.4.··Jarring¶
···4.2.5.··Eating¶
5.··Clean·Up¶
··5.1.··Washing¶
··5.2··Storage¶

Find and Replace

Find | Replace | Go To

Find what: `.`
Options: Search Down

Replace with: `^t`

More >> | Replace | Replace All | Find Next | Close

Introduction¶
1 → Planning·and·Scheduling·your·Canning·Day¶
··1.1→Participants¶
···1.1.1 → How·many·participants?¶
···1.1.2 → How·much·to·make?¶
···1.1.3 → Who·pays·for·what?¶
··1.2→Setting·a·date¶
··1.3→Location¶
2 → Equipment¶
··2.1→Special·equipment¶
···2.1.1 → How·much·equipment·to·buy¶
···2.1.2 → Where·to·buy·equipment¶
···2.1.2 → Cost·of·equipment¶
··2.2→Storage·of·equipment¶
3 → Ingredients¶
··3.1→Ingredient·list¶
··3.2→Preparation¶
···3.2.1 → Who·does·what·preparation¶
··3.3→Health·benefits¶
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··4.2→Step-by-step·procedures¶
···4.2.1 → Washing¶
···4.2.2 → Straining¶
···4.2.3 → Cooking¶
···4.2.4 → Jarring¶
···4.2.5 → Eating¶
5 → Clean·Up¶
··5.1→Washing¶
··5.2→Storage¶

Selecting Text Vertically in Word
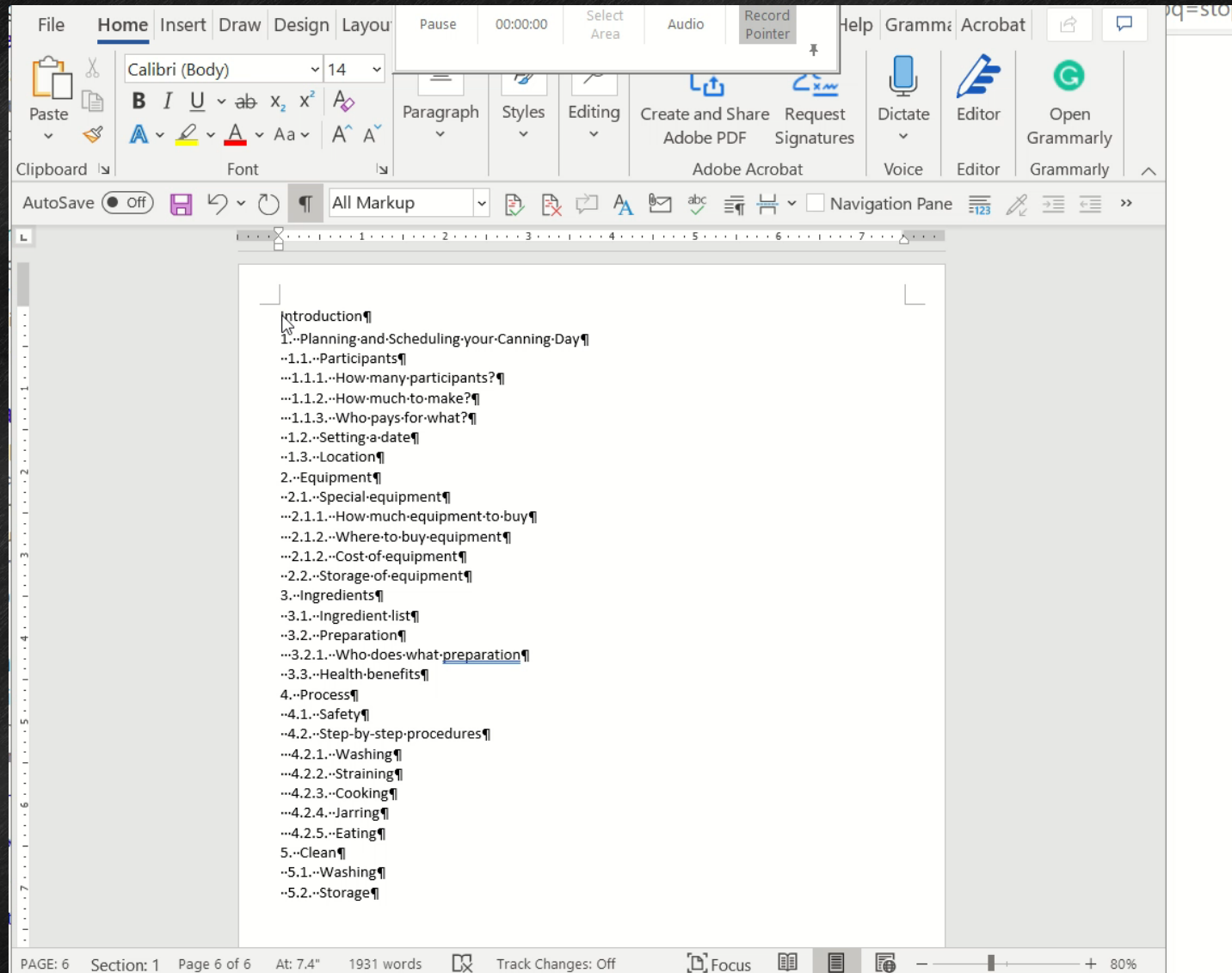
The last step requires that you hold down the Alt key before dragging up and to the left.

Re-format Tables

- This section of content had the formatting stripped from it.

- Quick way to fix that

Insert > Table > Convert Text To Table…

Converting Text to Table

- Set the number of columns you want

- Specify where to split the text

- Click OK

Text to Table

Results of using Convert Text to Table

Appraisal	Faceting specimens	Petrified wood
Arrowhead	Flint	Polished
Artisanal	Flintknapping	Precious gem
Beading	Fossil	Precious stone
Beads	Gem art	Rare
Cabochon	Gemstone	Rock
Cabs	Gemstone jewelry	Rock art
Carver	Gold	Rockhounding
Carving	Gold jewelry	Rose cut
Cast	Healing	Rough rock
Casting	Inlay	Sandblasting
Collection	Intarsia	Semi-precious
Commission	Jewelry	Setting
Consignment	Jewelry repair	Silver
Copper	Knapping	Silver jewelry
Course	Lapidary	Silversmith
Crystal	Local made	Silversmithing
Custom	Market	Slabbing
Cut stone	Metaphysical	Smithing
Cutting	Minerals	State gemstone
Design	Mining	Stone
Drill	Natural	Stone drilling
Exhausted mine	Old stock	Wholesale
Faceted stone	Petrified stone	Wire wrapping

Text to Table

Type the content separated by tabs and use this function to create a plain table you can then style.
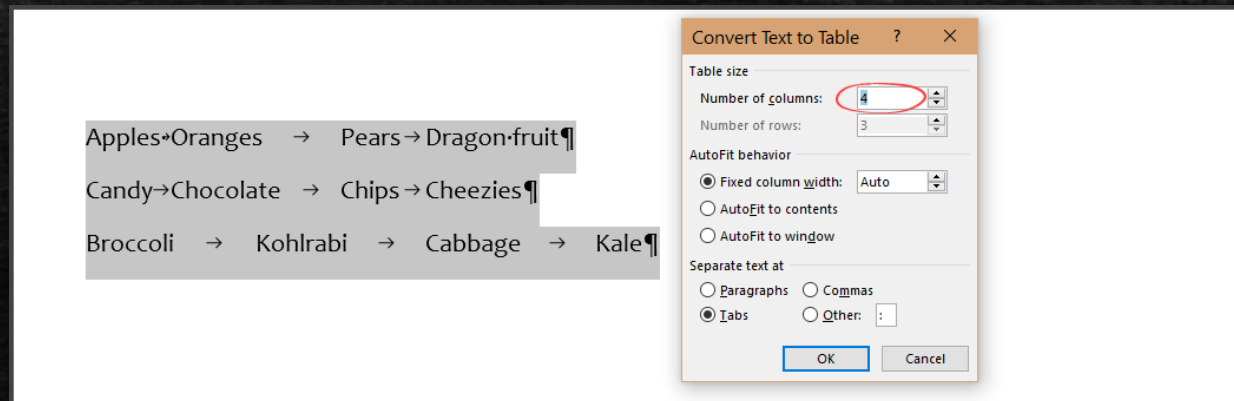
Convert Tables to Text
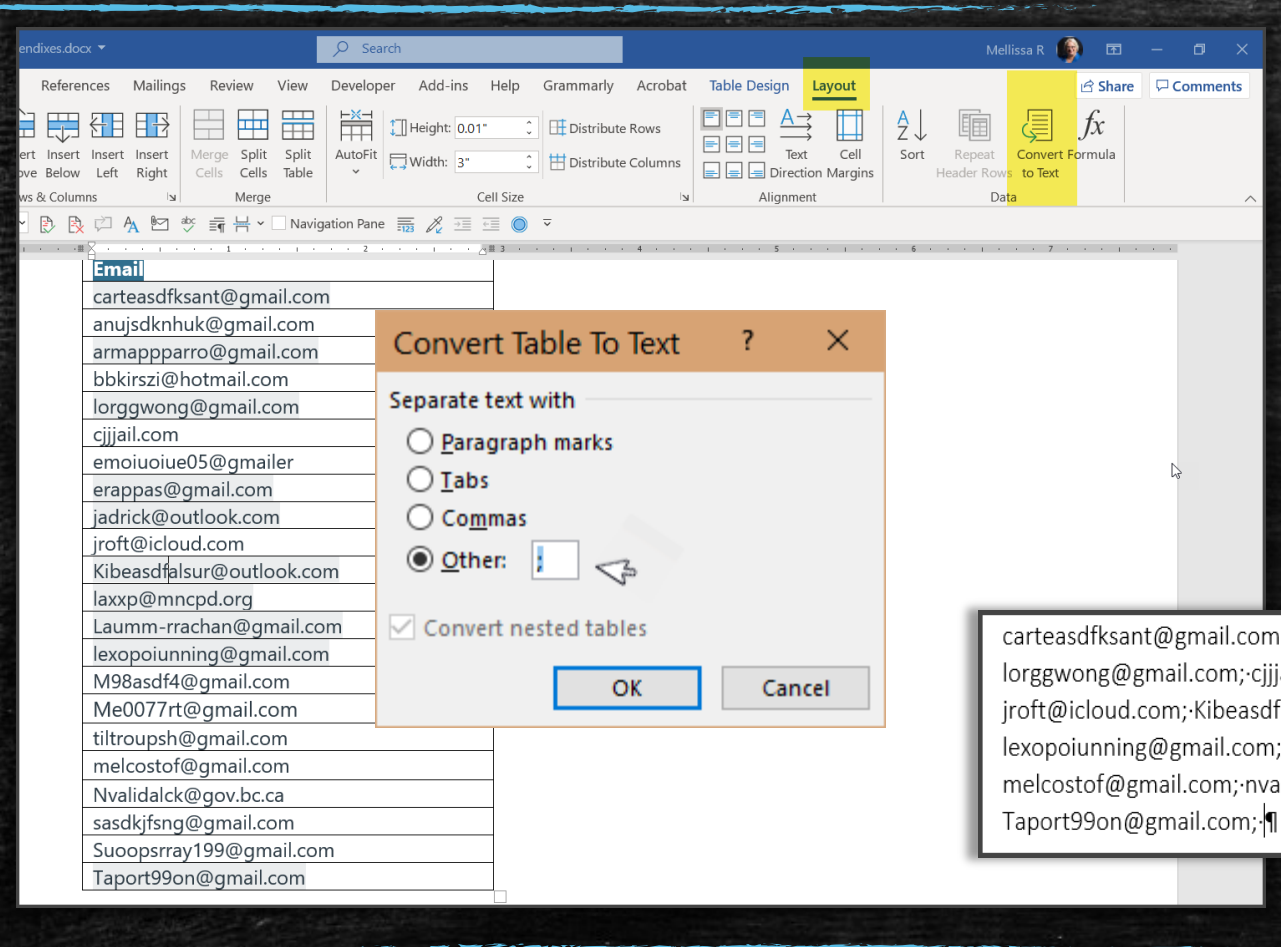
- Select content

Tables Layout menu > Convert to Text

- Pick a separator

- Click OK

Style Gallery vs. Style Pane

Style Gallery vs. Style Pane
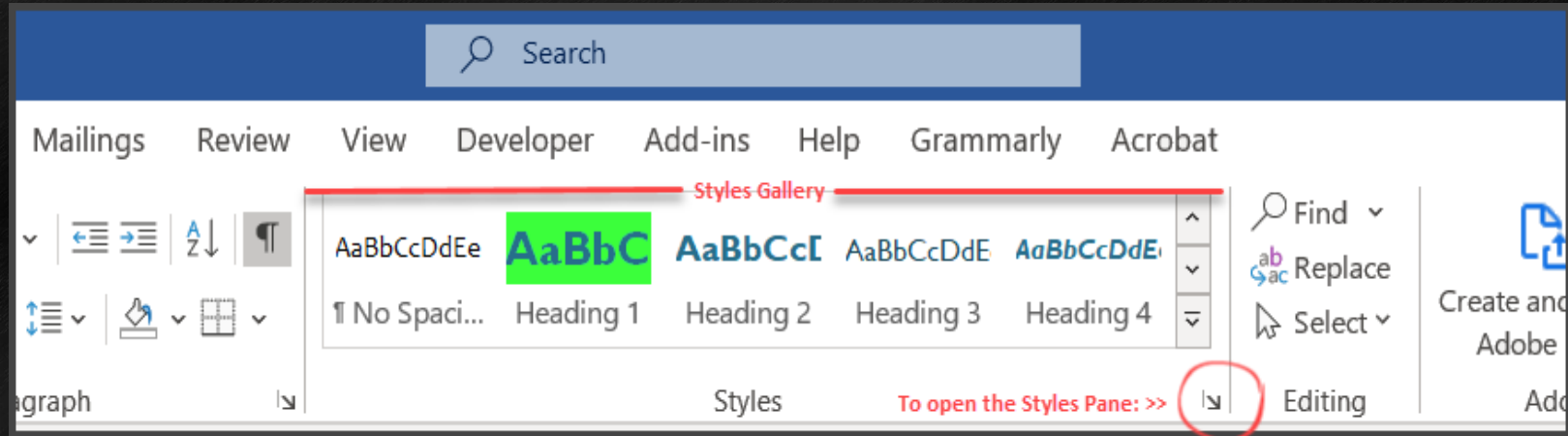
The Style Gallery is a shortcut to a subset of styles.

- To see the larger list of styles, click the disclosure arrow at the bottom right of the Style Gallery

Style Gallery vs. Style Pane
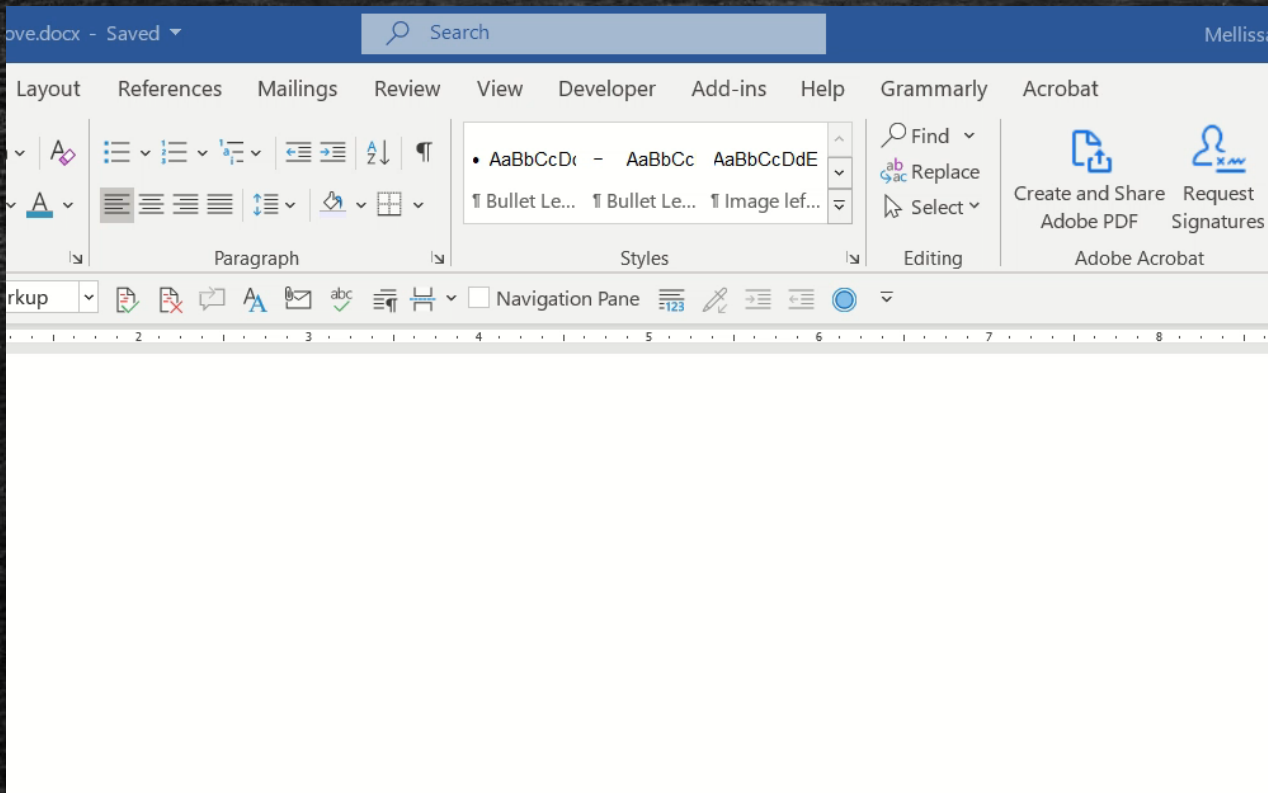
Style Pane Options

- Affects how styles are listed in the pane
  - *Personal preference is In Current document, sorted in Alpha order*

Add a New Style

Open the Style Inspector

Open the Manage Styles dialog

Style Pane – Style Inspector
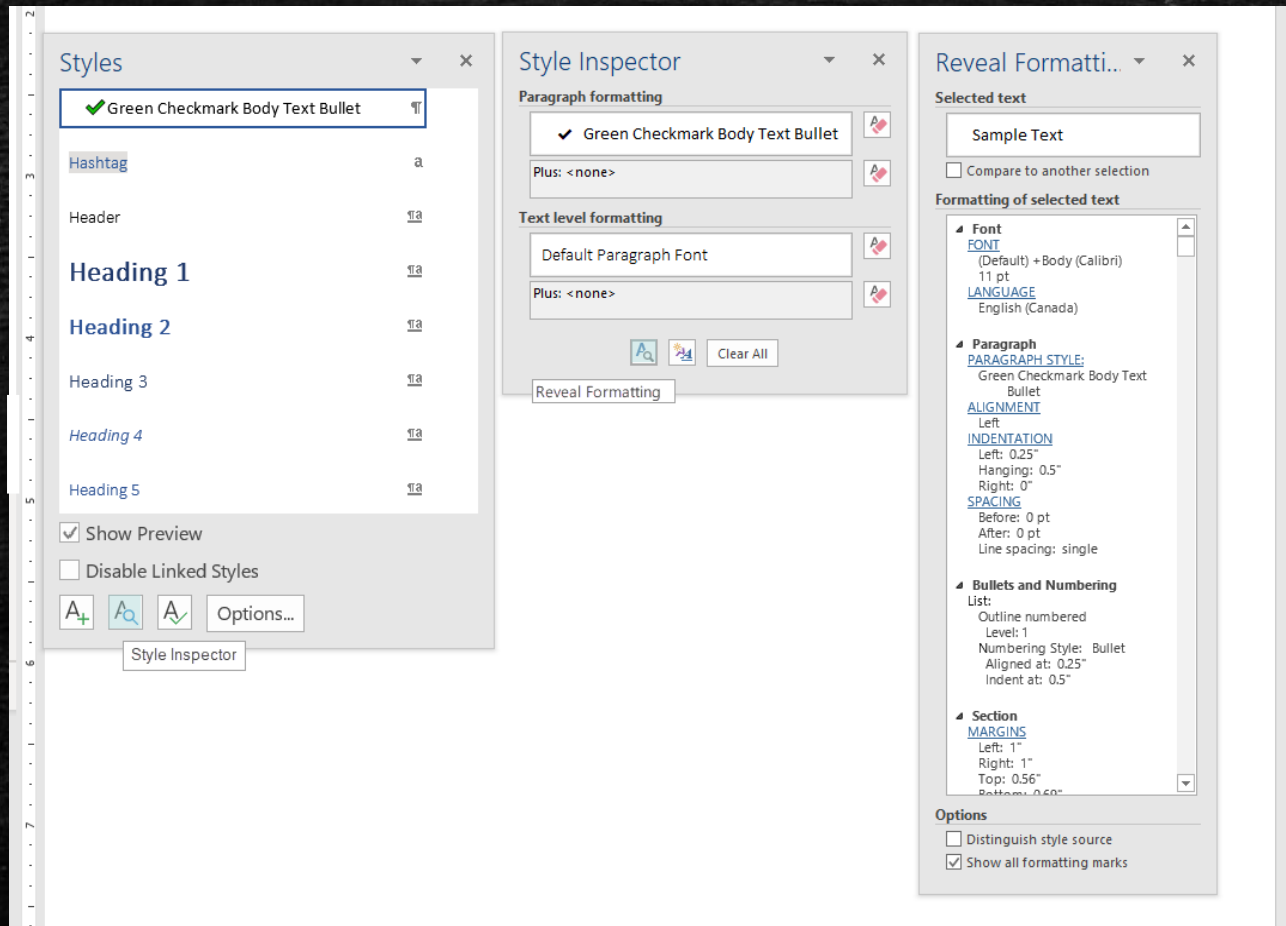
- Shows quickly what formats have been applied to the selected text

Style Pane – Manage Styles

Assigning a priority to a style moves it up the list when sorted "As recommended" but also in the Style Gallery

Style Pane – Apply Style
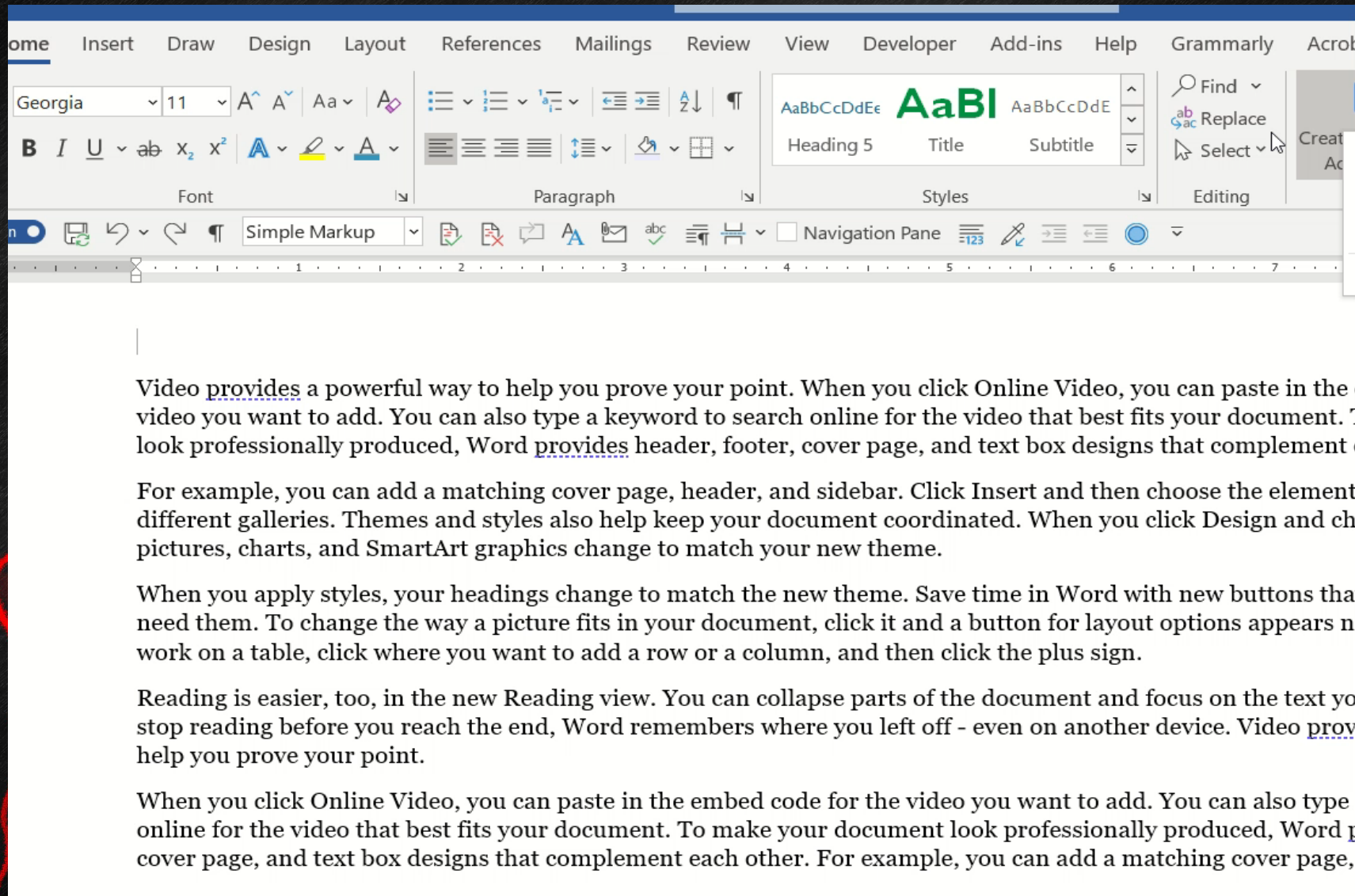
Apply a style by clicking the style in the Style Gallery or use the *Apply Style* dialog

Applying Styles – Creating a Style Shortcut
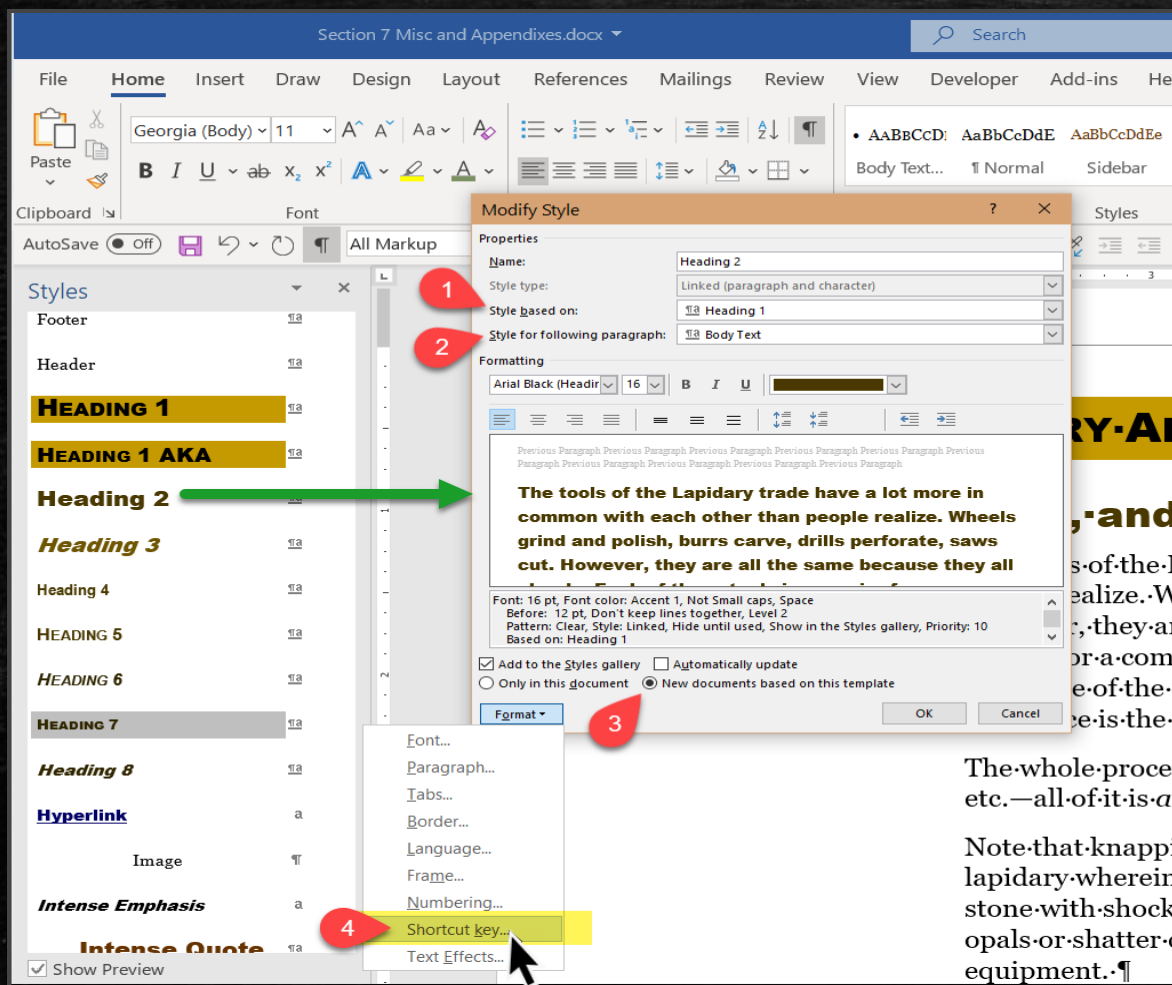
- Modify Style

Open Styles pane or locate the style in the Style Gallery, right-click > Modify

- But first, notice:
  1 *Style based on:*
  2 *Style for following paragraph*
  3 *New docs based on this template*

- Click the Format button
  4 *This is where you find the shortcut key*

Adding a Short Cut Key Assignment
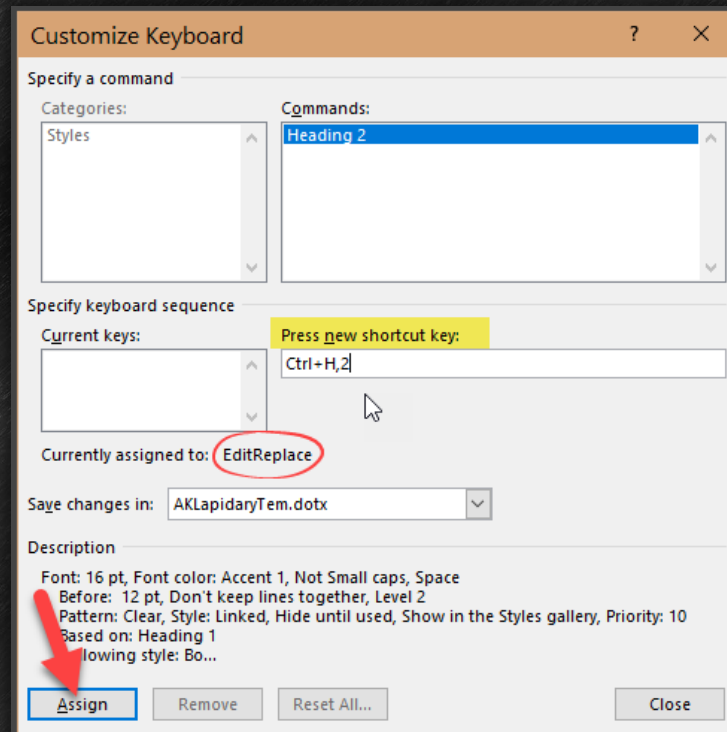
- Put your cursor in the Press new shortcut key field
  - *Writes over any previous assignment*

- I picked something I hope I'll remember: Ctrl-H should remind me of headings, 2=heading level 2

- Clicking Assign moves the shortcut to the Current keys: field

Created by Mellissa Ruryk for Instructional Design & Learning SIG/COP of STC

Saving Shortcut Keys

Customize Keyboard

Specify a command

Categories:
- Styles

Commands:
- **Heading 2**

Specify keyboard sequence

Current keys:
- Ctrl+H,2

Press new shortcut key:

Save changes in: **AKLapidaryTem.dotx**

Description

Font: 16 pt, Font color: Accent 1, Not Small caps, Space
Before: 12 pt, Don't keep lines together, Level 2
Pattern: Clear, Style: Linked, Hide until used, Show in the Styles gallery, Priority: 10
Based on: Heading 1
Following style: Bo...

[Assign] [Remove] [Reset All...] [Close]

- You can use the drop-down to select the current document or Normal.dotx as a place to store this shortcut.

- *If you feel you've made this change before, maybe more than once – it's because you didn't save it in the template you are currently using.*

Speaking the Language of the Word

When you learn to read Word's codes and formatting marks, you can make it behave.

Word's Codes
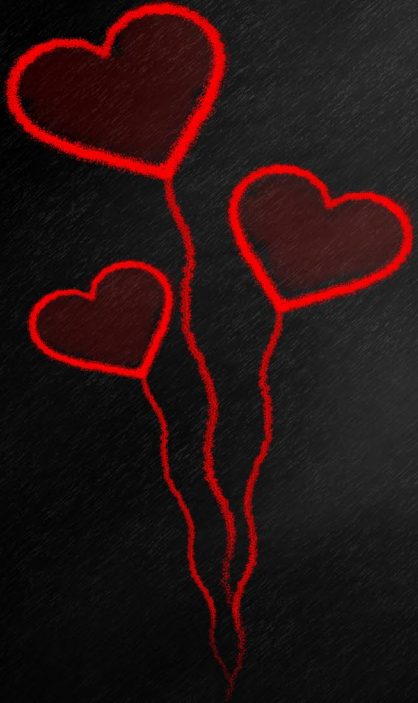
Tab characters	→
Spaces	...
Paragraph marks	¶
Hidden text	abc
Optional hyphens	⌐
Object anchors	⚓

End of row/cell marker	¤
Locked object anchor	⚓🔒
* Line and page break formatting	■
Line feed / soft return	↵
Non-breaking space	°
Sample hidden text	

Codes, AKA:
- "hidden" characters
- Non-printing characters
- Formatting marks

Pilcrow, AKA the:
- Backwards P
- Paragraph mark
- Hard return

Speaking Word's Language –1

- Each pilcrow controls the paragraph formatting of the paragraph before it.

- Each section break controls the section formatting of the section before it.

- When you delete a section break, you delete the section formatting of the section before the break. The section before the break adopts the section formatting of the section after the break.

- There is one exception, the last section of the document. The section formatting for the last section is stored in the last paragraph mark of the document.

- You cannot delete the last pilcrow in a doc, but you can cut everything from a doc except the last pilcrow and paste into new doc.

Speaking Word's Language –2

- All headers and footers are associated with sections.

- Headers and footers come in pairs.
  - No header without a footer, and vice versa
  - Either one or both of a header/footer set may be blank

- Every section has at least one header/footer set.
  - Create a new section → new header/footer set

- Add section breaks from front to back of document
  - Take advantage of the "Same as Previous" setting for header/footer sets
  - Understand "Previous" = previous *same type* of header/footer (i.e., same as previous First page header, same as previous Odd Page footer, etc.)
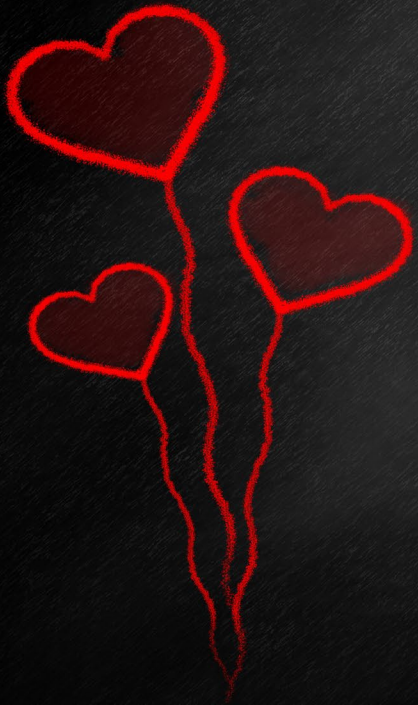
HOW DO WE FIX THIS?

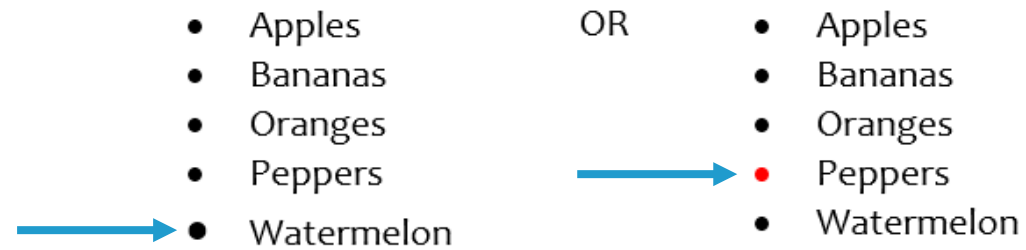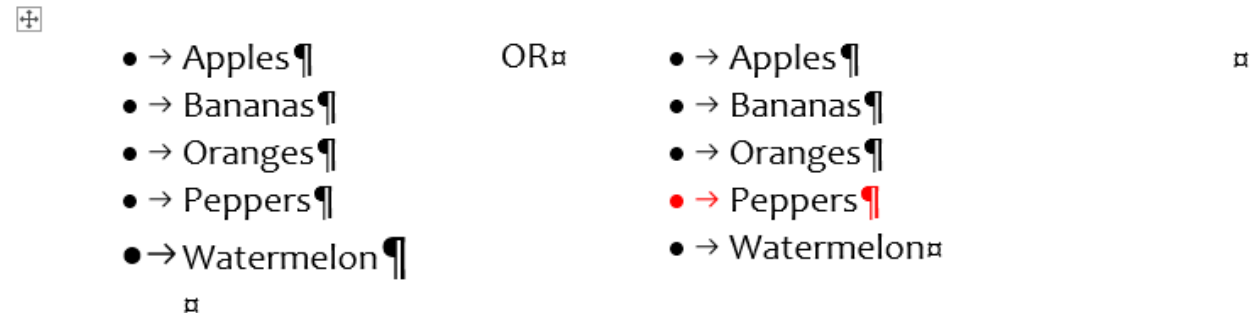Troubleshooting is much easier now...

Fixit Section

- What the heck?

- Look at the pilcrows:

Fixit Section

- What the heck?

See Error! Reference source not found. on page Error! Bookmark not defined.
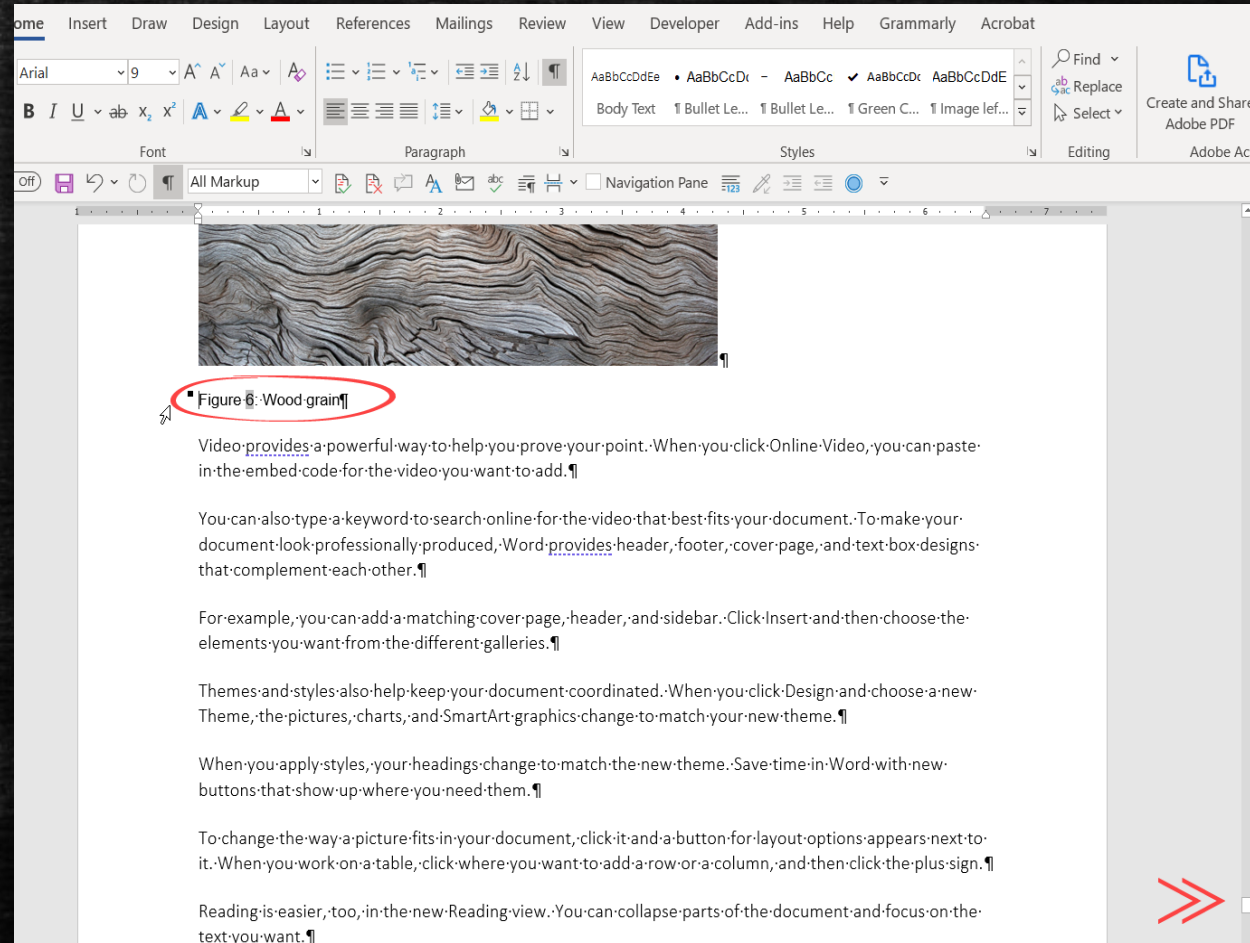
- Don't cross reference both title and page number:

See Headings on page Error! Bookmark not defined.

- (Heading is less likely to change, so xref page number. If heading changes, use Find and Replace to correct)
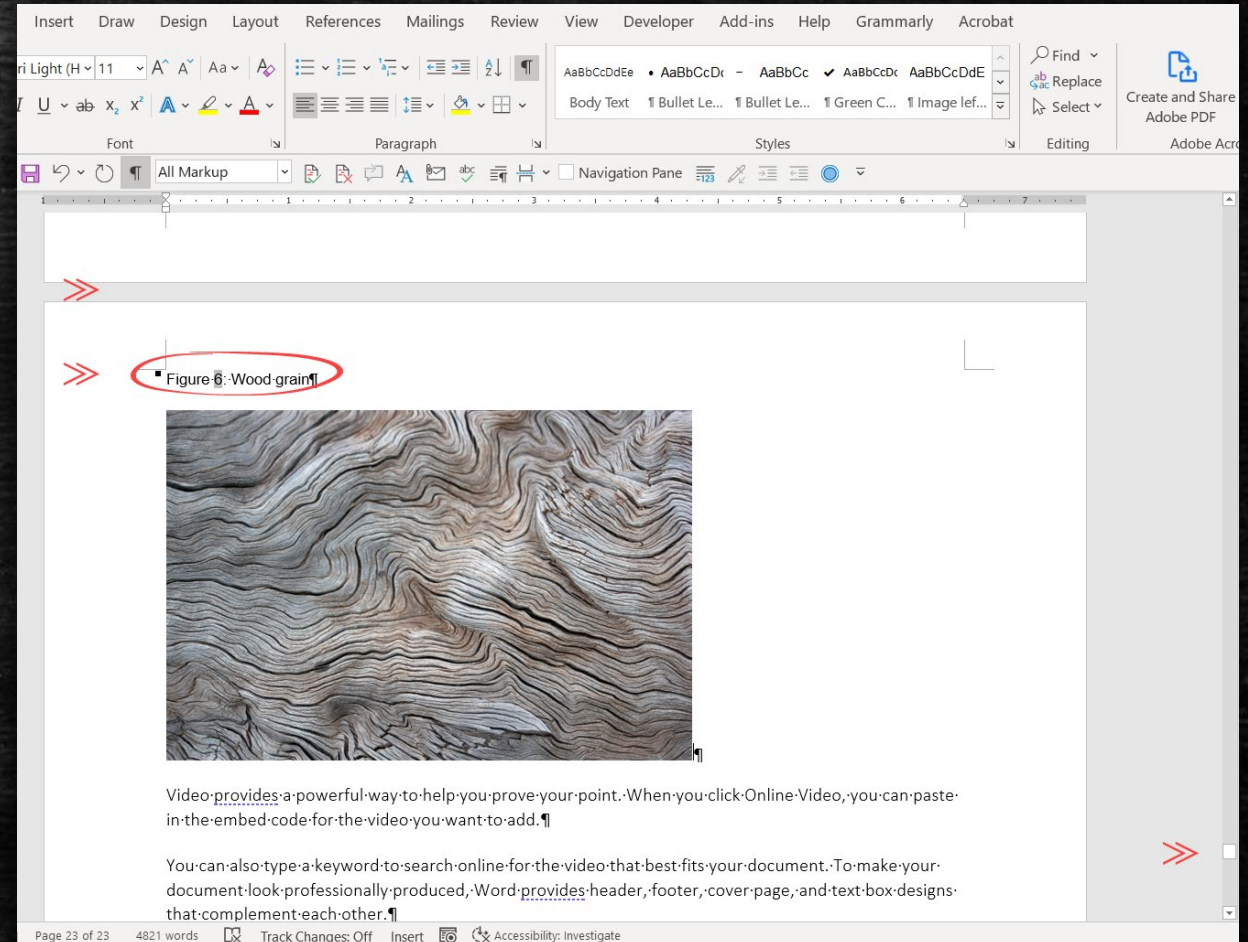
Fixit Section

- What the heck?

- Putting captions at the bottom means cross-references reposition such that the user has to scroll to see the entire image.

Fixit Section

- What the heck?

- Putting captions at the top means cross-references reposition such that the user can see the entire image without scrolling.
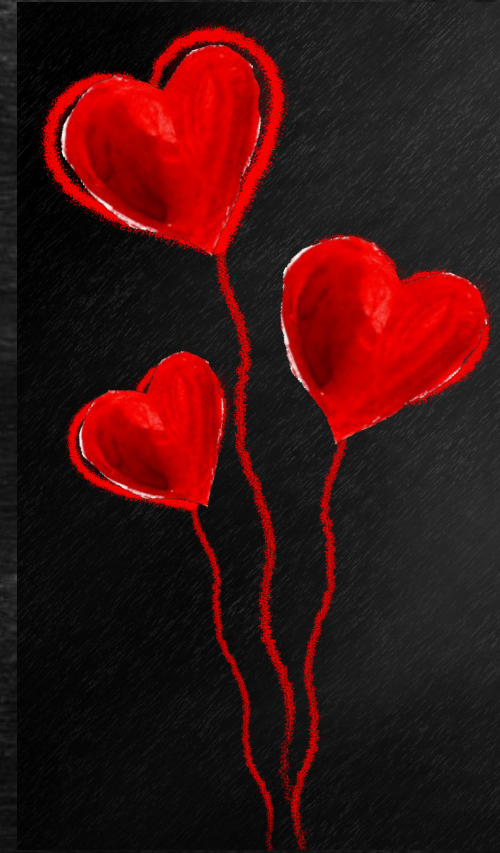
Shameless Plug

If you are interested in practicing these tips and creating your own How-to-Use-Word Manual with these and other tips, take a course called TCOM240 from the Lifelong Learning faculty at Simon Fraser University (SFU). It's a course that is part of SFU's Technical Communication Certificate, a well-regarded program that teaches the 9 core competencies of technical communication in 10 focused courses, plus a final 3-month practicum project.

https://www.sfu.ca/continuing-studies/programs-and-courses/area-of-study/writing-communications/technical-writing.html.
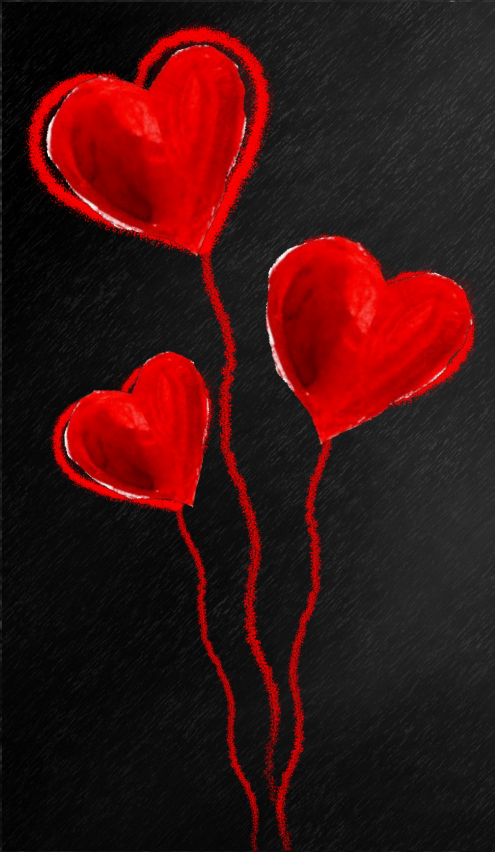
References and Resources

- Kevin Stratvert (used to be Kevin from Microsoft) runs a channel on YouTube with excellent videos on Word. One for beginners is How to use Styles in Microsoft Word.
- Allen Wyatt runs a website called wordribbon.tips.net providing tons of information and assistance. He also offers a free weekly email called Wordtips—sign up on his site.
- Shauna Kelly's advice was always spot on, but she passed away in 2011 from ovarian cancer. Basic information on her site (shaunakelly.com) is clear and exceedingly easy to understand, but not maintained. Newer features in Word are not covered.
- I was surprised to see so much free content at https://www.dummies.com/software/microsoft-office/word/—in addition to selling the For Dummies books onsite.
- Using wildcards in Find in Word: https://wordmvp.com/FAQs/General/UsingWildcards.htm
- Printing individual pages and page ranges in multi-sectional documents: https://support.microsoft.com/en-us/help/826218/how-to-print-a-range-of-pages-in-a-multiple-section-document-in-word-2
- Using bookmarks and cross-references in Word: http://www.docs.is.ed.ac.uk/skills/documents/3617/3617.pdf
- http://wordtrainingandtips.blogspot.com/2010/04/review-of-formatting-marks-aka_08.html
- https://www.online-tech-tips.com/ms-office-tips/show-reveal-formatting-in-word/
- https://www.howtogeek.com/357623/microsoft-word-keyboard-shortcuts-that-make-your-life-easier/
- Information about the SFU Certificate program and every course is available on https://www.sfu.ca/continuing-studies/programs-and-courses/area-of-study/writing-communications/technical-writing.html.

The End

If you have any questions, call or email me

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thank
yo♥u