Getting Word to show you some Love ♥

Word for Technical Communicators
Instructional Design & Learning SIG, a community of practice
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with Mellissa Ruryk
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- 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).

Field Shading and [Bookmarks]

File>Options>Advanced>Display
See the topic Bookmarks on page 3.
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 mistake.

- 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

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 valuable 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

1. Outline View
2. Go To dialog

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Created by Mellissa Ruryk for Instructional Design & Learning SIG/COP of STC 2/19/2021
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**
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

- 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**

- **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.
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”
Find and Replace
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

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
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, click 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
   - 2.2. Cost 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 procedure
     - 4.2.1. Washing
     - 4.2.2. Straining
     - 4.2.3. Cooking
     - 4.2.4. Jarring
     - 4.2.5. Storing
   - 5. Clean-Up
   - 5.1. Washing
   - 5.2. Storage

Find and Replace

Find what: Replace with: Options: Search Down Go To Replace Replace all Find Next Close
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...

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**APPENDIX F: SOCIAL-MEDIA-TAGS**

Because we all know social media is a thing now, here are some tags to reference when you post your work online, sign up for a feed... or to source inspiration.

Should you post tags as plurals (cubochons) or singular (cubochon)? There is no much difference, but it is not recommended to use both. Pick one and be consistent. When searching use the singular because “stone” matches both stone and stones.

Table F: Social-media-tags

- Appraisal
- Faceting specimens
- Petrified wood
- Arrowhead
- Flint
- Polished
- Artisan
- Flintknapping
- Precious gem
- Reading
- Fossil
- Precious stone
Converting Text to Table

- Set the number of columns you want
- Specify where to split the text
- Click OK
### Results of using Convert Text to Table

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

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

```
Apples → Oranges → Pears → Dragon-fruit
Candy → Chocolate → Chips → Cheezies
Broccoli → Kohlrabi → Cabbage → Kale
```

<table>
<thead>
<tr>
<th>Apples</th>
<th>Oranges</th>
<th>Pears</th>
<th>Dragon-fruit</th>
</tr>
</thead>
<tbody>
<tr>
<td>Candy</td>
<td>Chocolate</td>
<td>Chips</td>
<td>Cheezies</td>
</tr>
<tr>
<td>Broccoli</td>
<td>Kohlrabi</td>
<td>Cabbage</td>
<td>Kale</td>
</tr>
</tbody>
</table>
CONVERT TABLES TO TEXT

- Select content
  Tables Layout menu > Convert to Text
- Pick a separator
- Click OK
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
- Shows quickly what formats have been applied to the selected text
Assigning a priority to a style moves it up the list when sorted “As recommended” but also in the Style Gallery.
Video provides a powerful way to help you prove your point. When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document.

Look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar. Click Insert and then choose the element you need. Click Design and choose the templates from the appropriate galleries. Themes and styles also help keep your document coordinated. When you click Design and choose a theme, colors, text, and SmartArt graphics change to match your new theme.

When you apply styles, your headings change to match the new theme. Save time in Word with new buttons that need them. To change the way a picture fits in your document, click it and a button for layout options appears. When you click on a table, click where you want to add a row or a column, and then click the plus sign.

Reading is easier, too, in the new Reading view. You can collapse parts of the document and focus on the text you want to stop reading before you reach the end, Word remembers where you left off - even on another device. Video provides a visual element that can help you prove your point.

When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page.
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 Shortcut 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
Saving Shortcut Keys

- 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 Love: Word

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

**Codes, AKA:**
- “hidden” characters
- Non-printing characters
- Formatting marks

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

---

**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
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?

- Don’t cross reference both title and page number:

  (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.
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.

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
- Using bookmarks and cross-references in Word:
  - http://www.docs.is.ed.ac.uk/skills/documents/3617/3617.pdf
  - 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.
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thank you