

# Taming Microsoft Word 2002

Hot tips and cool tricks for  
business and technical documents

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Jean Hollis Weber

How to become an instant expert on:

- ◆ Setting up Word 2002 to work your way
- ◆ Editing and reviewing documents
- ◆ Controlling page layout
- ◆ Using templates and styles effectively
- ◆ Getting the most from fields
- ◆ Working with large or complex documents
- ◆ Working with graphics
- ◆ And more!

## Taming Microsoft Word 2002

Hot tips and cool tricks for business and technical documents

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Jean Hollis Weber  
P.O. Box 640  
Airlie Beach, Qld. 4802  
Australia

jean@jeanweber.com  
The Technical Editors' Eyrie <http://www.jeanweber.com/>

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# About this book

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## *Why another book about Microsoft Word?*

Look around the computer section of any bookshop and you'll find a dozen books about Microsoft Word. Why should I write another one?

I've found that the available books fall into three main groups: thin books for beginners, fat books for beginner-to-intermediate users, and fat books—often *huge*, up to 1,500 pages!—for intermediate-to-advanced users.

Try to find a thin book for intermediate-to-advanced users, and you're out of luck.

If you're a busy, possibly overworked, writer, editor, manager, or anyone who needs to produce large or complex documents using Word, the last thing you want is to wade through a huge book, even if it does have all the answers you need, explained in a way that makes sense to you.

This book is intended as a quick reference for writers, editors, and others who are already familiar with the basics of some word processing program (not necessarily Microsoft Word), and who need to use some of Word's more advanced features.

Readers are assumed to know the basics of working with Windows and a word processor, and to be familiar with the terminology and conventions of Microsoft documentation.

In such a short book, I have not attempted to cover all the features and functions of Word. Some topics that are not covered include macros, forms, and exchanging data with other Microsoft Office programs.

— Jean Hollis Weber  
Airlie Beach, Australia, October 2002

## *Technical notes*

The full text of this book is available in two formats: printed or PDF (Portable Document Format). You can download the PDF file through my Web site, <http://www.jeanweber.com/>.

The source files were created using Microsoft Word 2002 running on Windows ME. For screen captures, I changed the display settings to High Contrast White, captured the windows using the Windows Print Screen function and (when necessary) edited the images in MSPaint. The PDF file was created using Adobe Acrobat 5, set for Acrobat 3 compatibility.

## *Acknowledgements*

I am indebted to numerous people whose answers have contributed so much to my knowledge of how to tame Microsoft Word: the members of several Internet mailing lists, including Word-PC; Jack M. Lyons of The Editorium; Allen Wyatt of WordTips; and the many knowledgeable people on the MVPS Word website. Contact information for all of these people and groups is given in Appendix A of this book.

I am grateful to my editor Rebecca Martin, who tested all of the instructions in this book, as well as copyediting and offering excellent suggestions for improvements.

Any errors remaining in this book are entirely my responsibility.

### *Dedication*

To Eric Lindsay, for putting up with me during the research and writing of this book, assisting with technical problems, providing food and drink at appropriate intervals, and just being there as a life partner.

### *About the author*

Jean Hollis Weber has a Master of Science degree in botany and over 25 years of experience as a scientific and technical editor and writer in the fields of biology, mathematics, engineering, and computing. She has taught short courses in writing and editing and lectured to graduate and undergraduate level classes in writing and editing at several universities. Jean is active in the Australian Society for Technical Communication (NSW) Inc and the Society for Technical Communication (USA).

A dual US–Australian citizen, Jean has lived in Australia since 1974. Recently she escaped from the big cities to live in a seaside resort town at the gateway to the beautiful Whitsunday Islands, from where she conducts her editing business over the Internet. Jean maintains the Technical Editors' Eyrie website, <http://www.jeanweber.com/>, and publishes a free e-mailed newsletter for editors.

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# Chapter 1

## Setting up Word to work your way

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If you use Word a lot, you'll want to take the time to set up the interface to suit your work and your personal preferences. But even if you use Word only occasionally, you can make a few quick changes to make your work much easier.

- Controlling the Office Assistant
- Disabling personalized menus
- Choosing save options and default format
- Displaying paragraph marks, tabs, text boundaries, and other items
- Choosing editing options
- Choosing printing options
- Choosing general options
- Preparing for spelling and grammar checking
- Ensuring your user information is correct
- Controlling Word's AutoCorrect functions
- Sharing documents with people using a different version of Word
- Installing more than one version of Word on the same computer
- Advanced tips

You can change other Word features to suit your preferences and working habits. For more information, check the online help for **Toolbars, customizing**.

---

**Tips** If you use Word a lot, you'll want to learn some of the many keyboard shortcuts. Look for **Keyboard shortcuts** in the online help.

If you're not sure what the options are in a dialog, use ScreenTips to get more information. (Click the question mark  in the upper right-hand corner of the dialog, and then click the option.)

The tips in this chapter apply to Word 2002 installed on your computer. If you are running Word from a network drive, some of these changes may not be retained when you log off. You might want to put all your customizations in a personal template that you can back up or copy to other computers. See Chapter 4, "Using templates and styles effectively" for more information.

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## Controlling the Office Assistant

The Office Assistant is the cartoon that pops up to offer help with whatever you're doing, often when you don't want or need any help. If you find this behavior irritating, here's how to change what the Office Assistant does, or banish it completely:


1. Open the Office Assistant (press **F1**, or choose **Microsoft Word Help** from the **Help** menu, or click the Help button  on the toolbar).
2. In the "What would you like to do?" balloon (Figure 1), click **Options**, or right-click on the cartoon and choose **Options** from the pop-up menu.



Figure 1. The Office Assistant

3. On the **Options** tab of the Office Assistant dialog (Figure 2), deselect the **Use the Office Assistant** checkbox. If you prefer, you can keep the Office Assistant but remove some of its behavior. Deselect some or all of the checkboxes under **Show tips about**—especially the checkbox for **Using features more effectively**. You might also want to deselect some of the checkboxes under **Use the Office Assistant**, but leave **Respond to F1 key** selected.

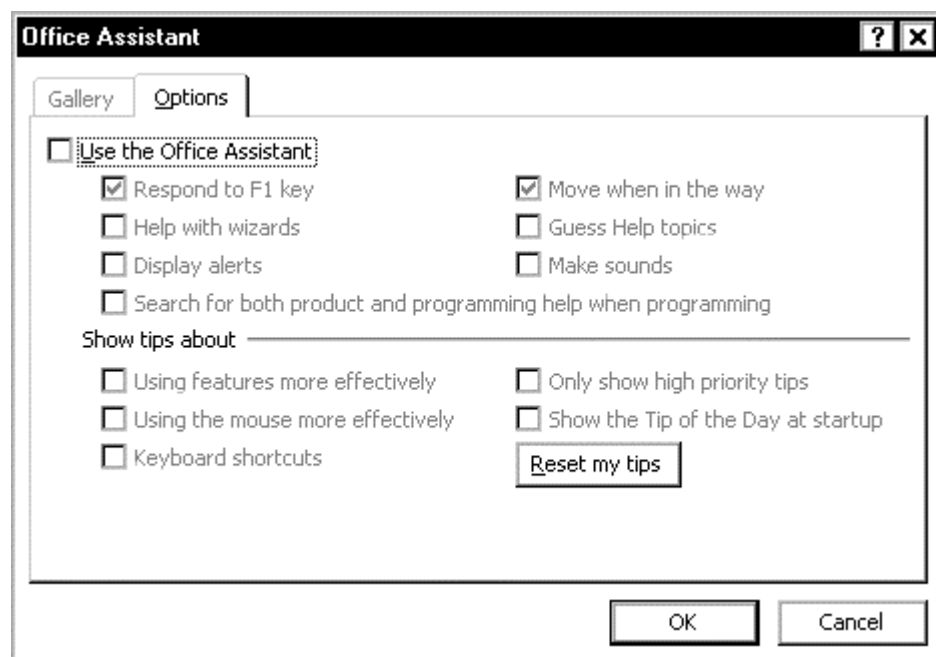


Figure 2. Choosing Office Assistant options

## Disabling personalized menus

Word 2002's menus may show only a short list of some of the commands available on each (with a double down-arrow you can click to show all the commands). The short lists change as you work, showing the most-used menu items first. As your working habits change, the menus change too.

If this feature annoys you, you can turn it off.

1. On the menu bar, click **Tools > Customize > Options** tab (Figure 3).
2. Select the checkbox for **Always show full menus**. You may also want to select **Show Standard and Formatting toolbars on two rows**. For more about toolbars, see "Customizing toolbars and menus" on page 93.

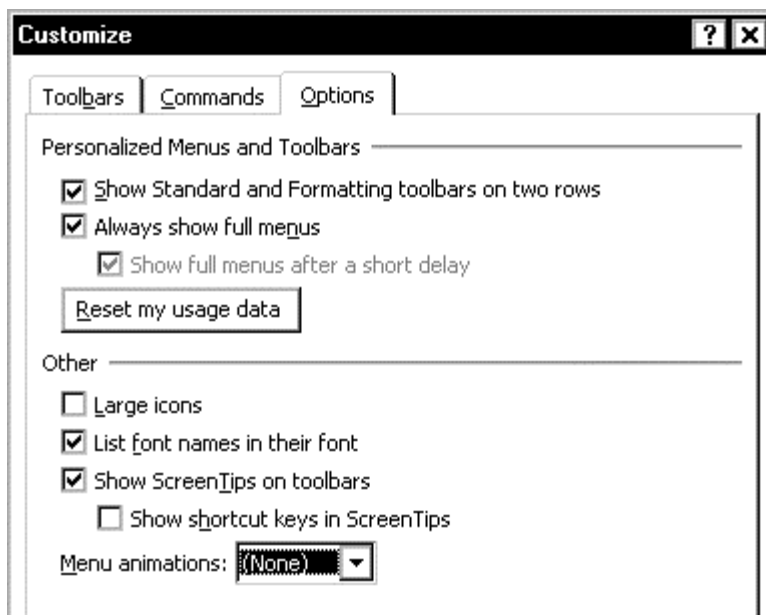


Figure 3. Disabling personalized menus

3. I deselect the **List font names in their font** checkbox, which affects one of the Style lists on the Formatting toolbar. With this checkbox selected, the Style list looks like Figure 4, left; with the checkbox deselected, the Style list does not show formatting (Figure 4, right).
4. Make any other changes you wish, then close the dialog.

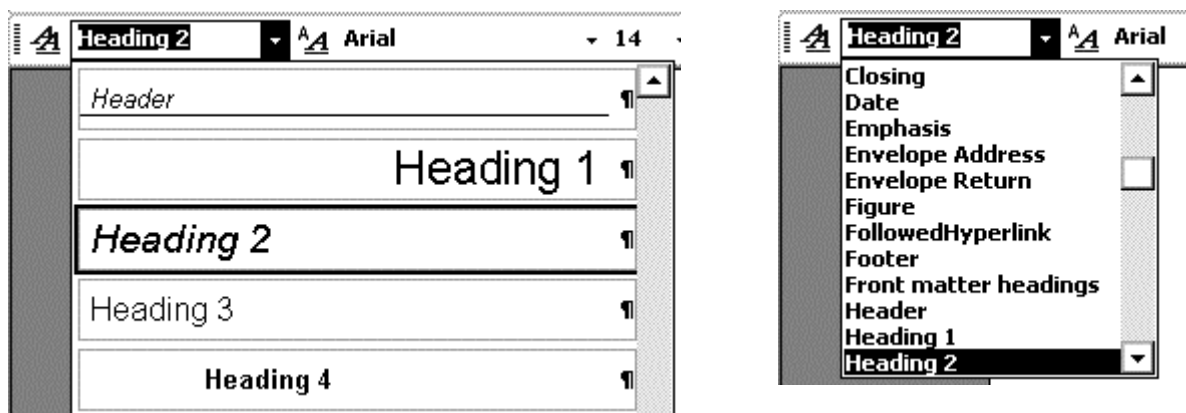


Figure 4. (Left) Style list showing formatting; (Right) Style list without formatting

## Choosing save options and default format

Why turn off Fast Save? Three main reasons: file size can increase dramatically, documents can get scrambled in the middle of a Fast Save, and—most importantly—there is a potentially serious security risk because deletions remain in the file (though hidden from your view) until the file is saved normally. You don't need this feature (it dates from the days of slow disk access speeds), so why take a chance?

1. On the menu bar, click **Tools > Options** and choose the **Save** tab (Figure 5).
2. Deselect the **Allow fast saves** checkbox.
3. I recommend you also select **Always create backup copy**.

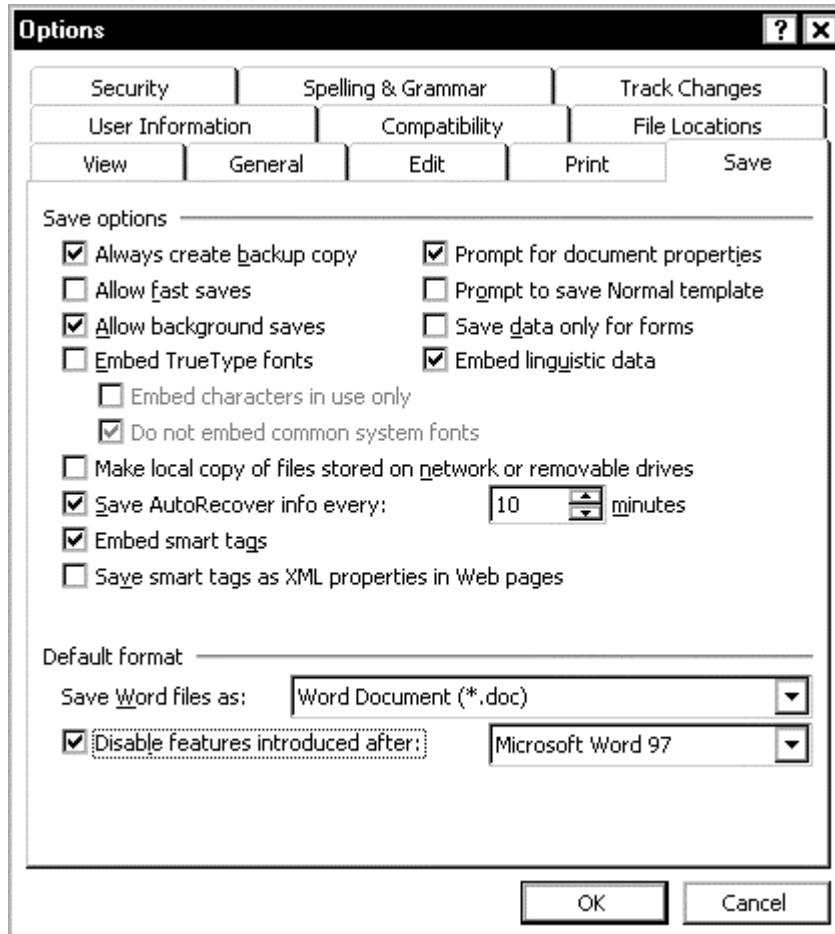


Figure 5. Choosing Save options

4. On this page you can also choose whether to **embed smart tags**. For more information about this new feature in Word, see page 96. I turn this feature off, but you may find it useful.
5. If you are working with other people who use an earlier version of Word, you may want to **disable some of the new features of Word 2002** that are incompatible with earlier versions of Word.
6. Continue to the next section (“Displaying paragraph marks, tabs, text boundaries, and other items”), or click **OK** to save your changes.

## Displaying paragraph marks, tabs, text boundaries, and other items

Writing and editing are much better done when you can see as much as possible of what's going on in Word. For example, you need to know if any blank paragraphs or tabs are included, or any tables or graphics are too wide and intrude into the margins of the page, so you can fix these problems.

1. In the Options dialog, choose the **View** tab (Figure 6).
2. In the **Show** group, choose options that suit the way you work. I select **Status Bar**, **ScreenTips**, **Horizontal** and **Vertical scroll bars**, and **Field shading When selected**. I deselect **Windows in Taskbar**, but you may prefer to enable them.
3. In the **Formatting marks** group, I select **Tab characters** and **Paragraph marks**.
4. In the Print and Web layout options group, I select **Text boundaries**, **Drawings** and **White space between pages**.

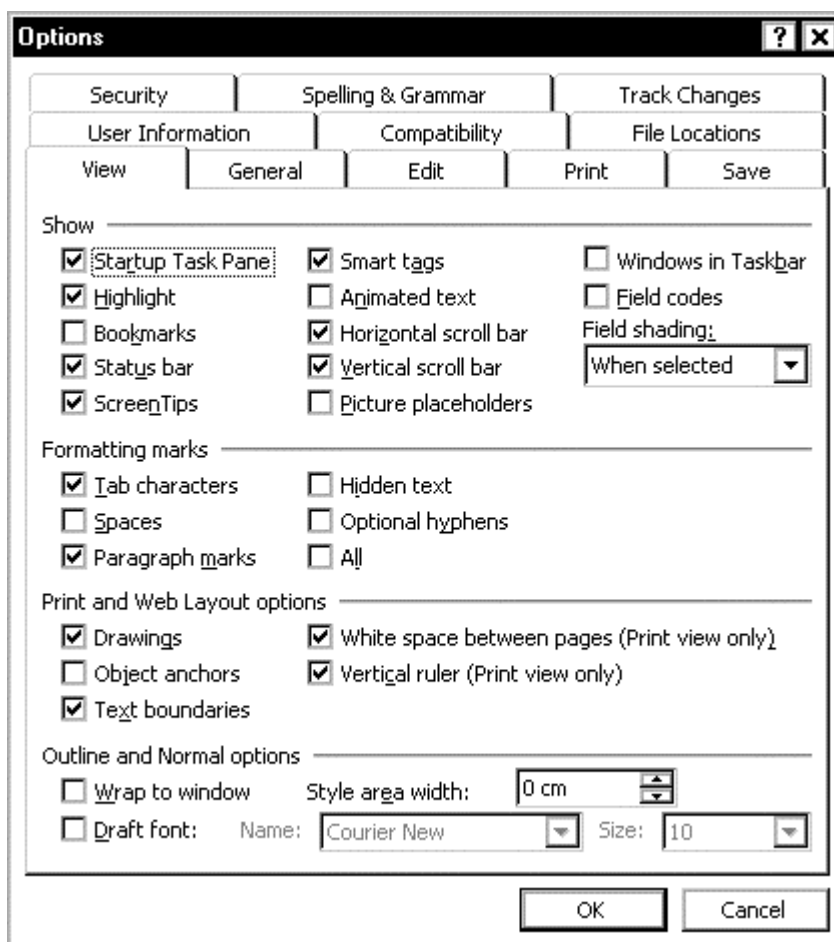


Figure 6. Choosing View options

5. Continue to the next section (“Choosing editing options”), or click **OK** to save your changes.

## Choosing editing options

1. While you're in the Options dialog, choose the **Edit** tab (Figure 7) and choose the editing options that suit the way you work.
2. I deselect most of these features, because they interfere with the way I work, but you may find some of them helpful.

I do like **Typing replaces selection**, but many people hate it. Many people like **Drag-and-drop text editing** and **Use the INS key for paste**, but I don't like either of them.

A new option is **Use smart paragraph selection**, which ensures that you select the end-of-paragraph marker when you select an entire paragraph.

Another new option is **Use CTRL + Click to follow hyperlink** to prevent following a link when you wanted to select the link instead. I love this one!

**Prompt to update style** displays a dialog asking whether you want to update a style based on your manually-applied changes or reapply the style definition (thus over-riding your manual changes).

**Keep track of formatting** tells Word to store formatting information as you type. See "Remove unwanted and unused styles from a document" on page 55 for an important use of this feature.

If you have **Keep track of formatting** selected, you can also choose whether to have Word **Mark formatting inconsistencies**. In my experience, any time you allow Word to make decisions, you increase your chances of unexpected and unwanted things happening, so I avoid all these choices.

You can also specify the default picture editor and the default option for inserting or pasting pictures (inline or several variations of floating with text wrapping).

Be sure to deselect **Enable click and type**, which is not compatible with a disciplined use of styles and layout.

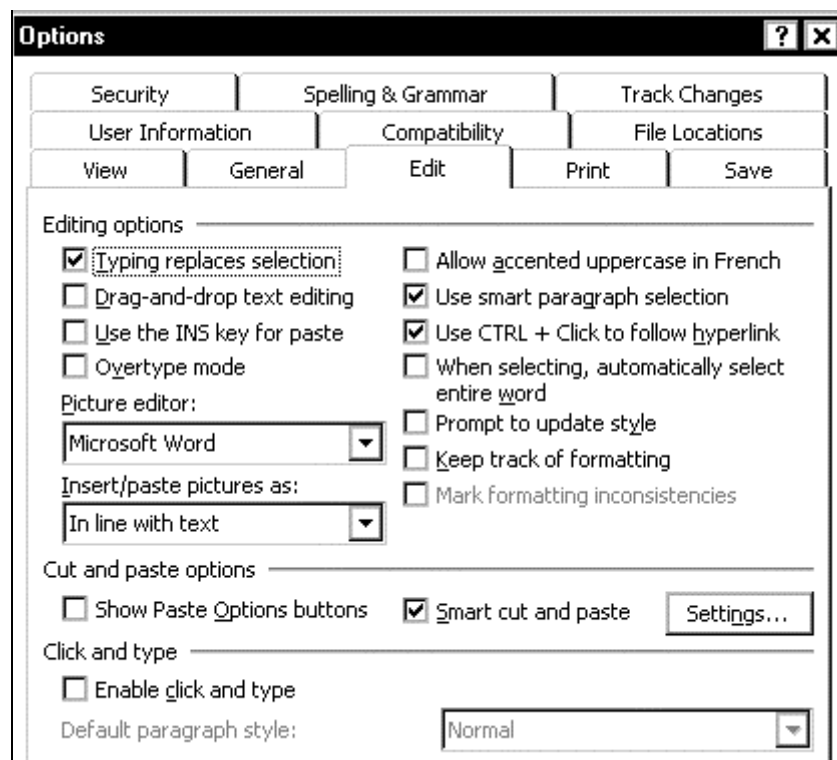


Figure 7. Choosing Edit options

3. If you do select **Smart cut and paste**, click the **Settings** button and choose individual cut-and-paste options (Figure 8).

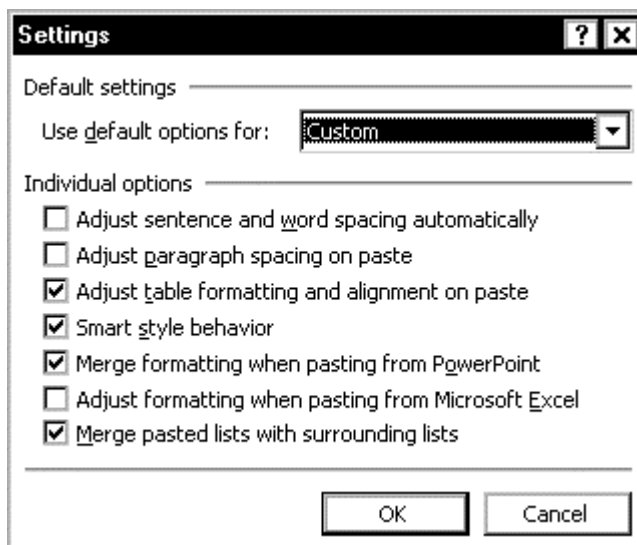


Figure 8. Choosing settings for cut and paste

4. Make any other changes you wish, then continue to the next section ("Choosing general options"), or click **OK** to save your changes.

### Choosing printing options

1. In the Options dialog, choose the **Print** tab (Figure 9).
2. Select **Update fields** in the **Printing options** group, and **Drawing Objects** in the **Include with document** group.

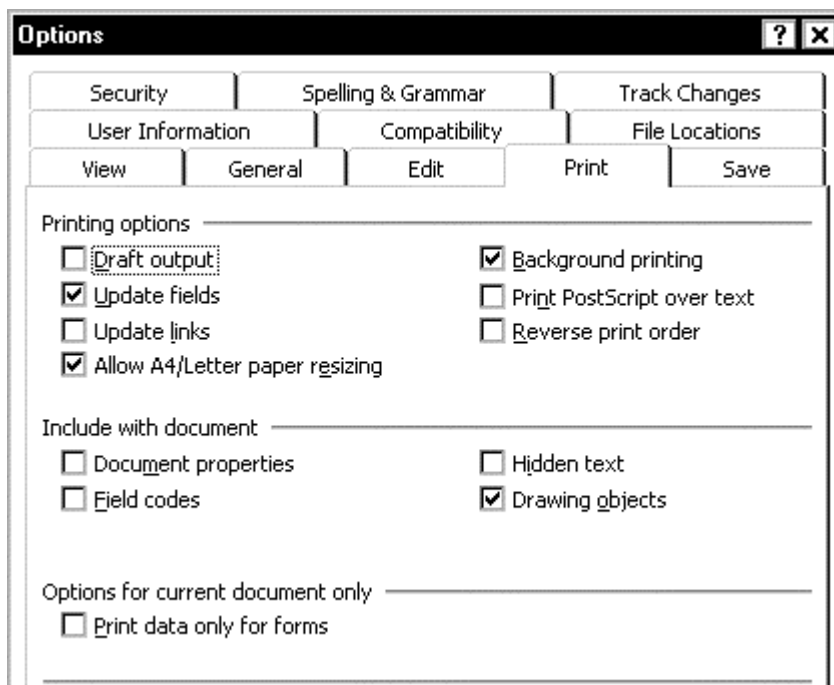


Figure 9. Choosing Print options

3. Make any other changes you wish, then continue to the next section ("Choosing general options"), or click **OK** to save your changes.

## Choosing general options

1. In the Options dialog, choose the **General** tab (Figure 10).
2. Specify the number of files in the recently-used file list (I choose 9, the largest available number).
3. Choose your measurement units.

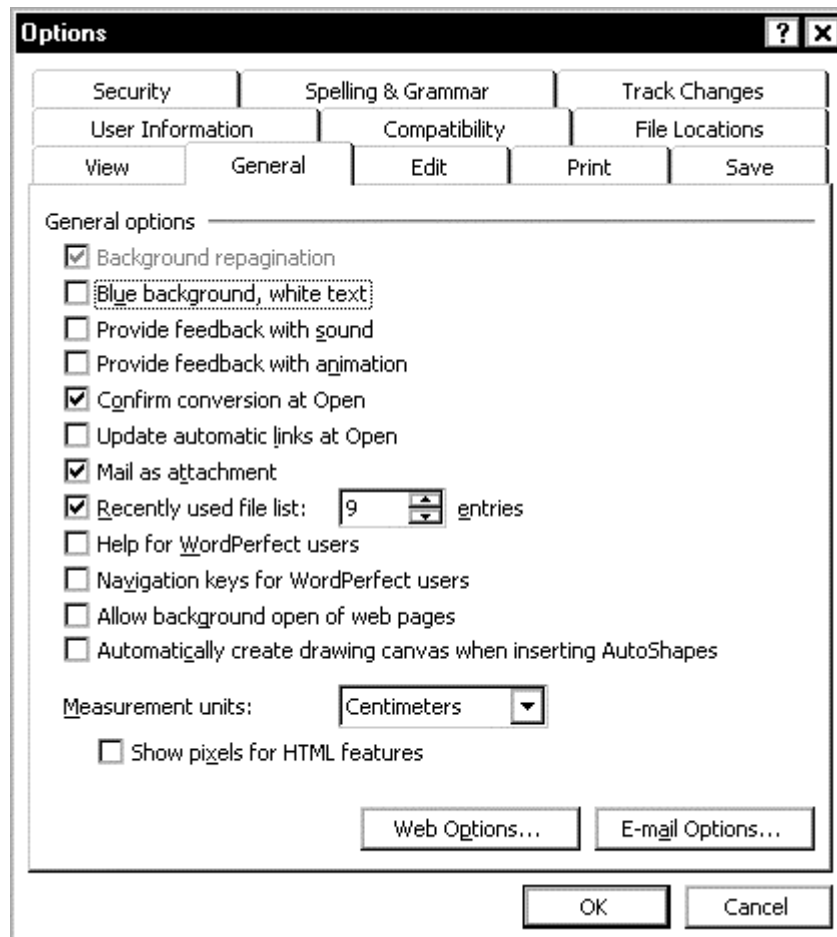


Figure 10. Choosing General options

4. If you wish, click the **Web Options** and **E-mail Options** buttons and make selections. (I don't use Word to produce Web pages or as an e-mail editor, so I ignore all of these.)
5. You may wish to set some options on the other pages of this dialog. Some of these are covered in other sections of this book:

**Spelling & Grammar** on page 9

**User Information** on page 14

**Compatibility** on page 17

**Track Changes** on page 24

**File Locations** on page 47

For information on the **Security** page, see the online help.

6. When you are done making all your changes, click **OK** to save them.



## Preparing for spelling and grammar checking

You may need to do several things to set the spelling and grammar checking options to what you want:

- Choose the spelling and grammar options
- Set the spelling checker to the correct version of English
- Create and use a custom dictionary

### Choose the spelling and grammar options

On the **Spelling & Grammar** tab (Figure 11) of the Options dialog, choose the settings that are useful for you.

In the **Spelling** section:

- I deselect **Check spelling as you type** (because it annoys me) and **Suggest from main dictionary only** (because I normally include custom dictionaries).
- If you use a custom dictionary that includes words in all uppercase and words with numbers (for example, AS/400), you probably want to deselect **Ignore words in UPPERCASE** and **Ignore words with numbers**.
- I select **Ignore Internet and file addresses**, because so many of these are not used frequently enough to bother adding to a dictionary.
- Here you can also check which custom dictionaries are active for this document, and add or remove dictionaries, by clicking the **Custom Dictionaries** button.

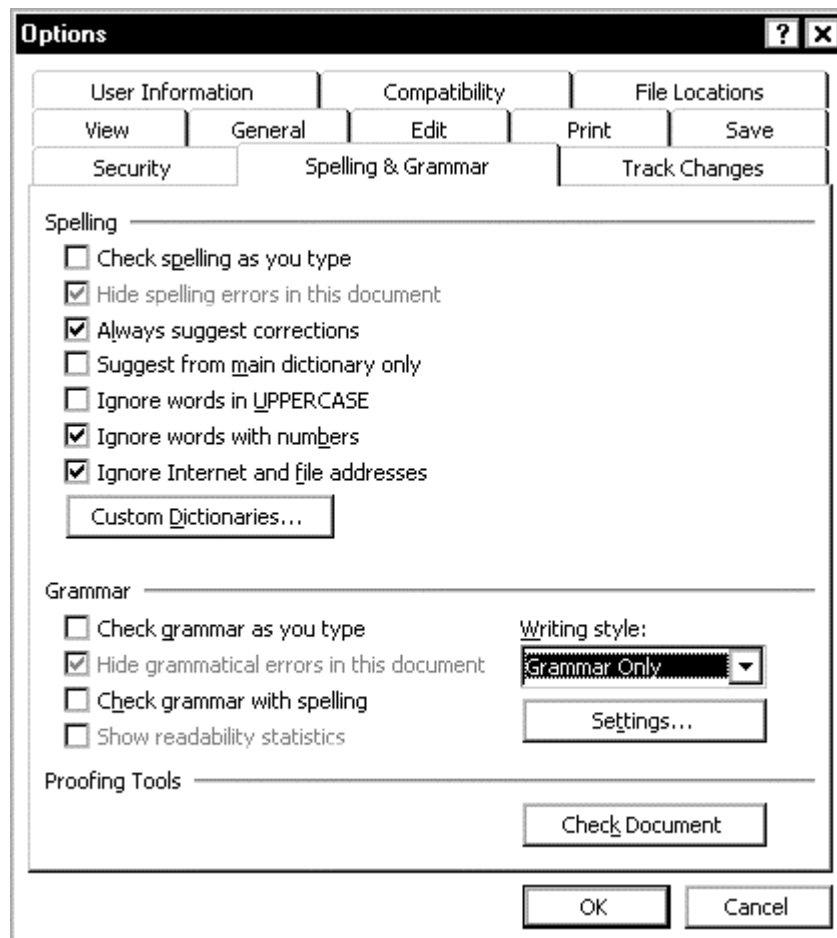


Figure 11. Choosing Spelling and Grammar options

In the **Grammar** section:

- I deselect **Check grammar as you type**.
- I deselect **Check grammar with spelling**.
- I select **Grammar Only** in the Writing Style box, and click the **Settings** button to go to the **Grammar Settings** dialog.

On the **Grammar Settings** dialog (Figure 12), you can choose some useful settings and turn off any that annoy you. The items I find most useful are:

- **Comma before last list item**. Because the standard in US English is to include the comma, and the standard in Australian English is not to include the comma (except when omitting it would cause confusion), I let the software find all the constructions that might be wrong in a particular document.
- **Punctuation with quotes**. Again, the standard in US English is different from that in Australian English.
- **Spaces required between sentences**. Whether you prefer the modern usage of one space between sentences, or the older usage of two spaces, this setting provides a quick way to ensure consistency.

I find most of the **Style** choices (visible when you scroll down in the options list) irritating—because they find a large number of constructions that are not wrong and just waste my time in checking—so I normally turn them off. However, if you find any of them useful, leave them selected. One exception is:

- **Passive sentences**. After the program finds them for me, I can decide whether to change them to active constructions, leave them passive (sometimes the passive voice is more appropriate), or decide that the construction isn't actually passive although the computer interprets it as such.

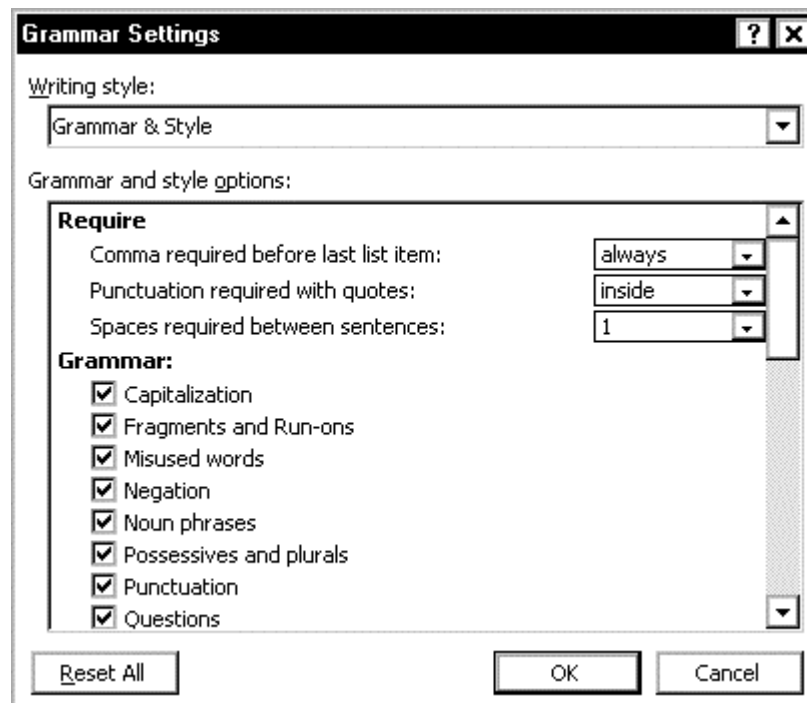


Figure 12. Choosing grammar settings

## Set the spelling checker to the correct version of English

The “correct version of English” usually isn’t an issue if you and all the writers you work with have your systems set up to use the same version (either US or UK English), and all of you write exclusively in that version of English.

However, if you work with some documents requiring US English spelling and other documents requiring UK English spelling, you may need to change a template or a document from one to the other.

To change the default language for the template you have attached to your current document:

1. On the menu bar, click **Tools > Language > Set Language**.
2. On the Language dialog (Figure 13), highlight the required version of English on the list of languages.
3. Click the **Default** button.



Figure 13. Choosing the required version of English

---

**Tip** This change does not affect the default language for any other templates, or for any existing documents, including the one you have open when you change the template. It only affects new documents based on that template.

---

To change the language for the current document:

1. Switch to Normal view and select all the text (**CTRL+A**).
2. On the menu bar, click **Tools > Language > Set Language**.
3. On the Language dialog (Figure 13), highlight the required version of English on the list of languages and click **OK**.

---

**Tips** If you don’t have a dictionary installed for the language you want, then switching to a different language won’t help. You may need to purchase the dictionaries from <http://shop.microsoft.com> or <http://www.proofing.com/>.

The English language version of Office XP includes tools (spelling, grammar, hyphenation, thesaurus) for English, French and Spanish.

The English (UK) dictionary appears to accept some American spelling as well as traditional British spelling, so you may need to use an exclude dictionary as well; see page 14.

---

## Create and use a custom dictionary

Many writing projects include large numbers of terms that are not in the supplied dictionaries. Technical terms and product names are the most common. To make sure they are spelled correctly, you can do one of these things:

- The first time the spelling checker encounters the term in a document, click the **Ignore All** button. It will then skip all other instances of the word.
- If you routinely work with highly specialist material (for example, medical or legal documents), you may wish to purchase a supplemental dictionary. For more information, see the online help.
- If the word is one that appears in several documents, you may wish to add it to a custom dictionary. Word comes with a default custom dictionary called CUSTOM.DIC. You can create as many other custom dictionaries as you need. You may want separate custom dictionaries for different clients or for different projects.

To select a custom dictionary to use with a document:

1. On the **Spelling & Grammar** tab of the Options dialog (Figure 11), click the **Custom Dictionaries** button.
2. In the Custom Dictionaries dialog (Figure 14), select the checkbox next to each dictionary you want to use (Microsoft calls this “activating” them). You can activate up to 10 custom dictionaries at a time.
3. Click **OK**.

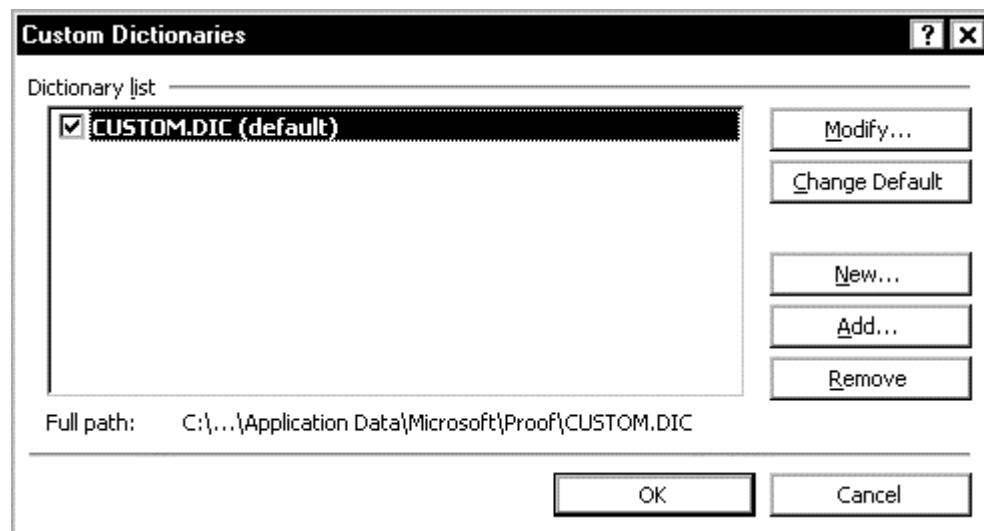


Figure 14. Activating a custom dictionary

If a custom dictionary you want to activate isn't in the Dictionaries list, but you know it exists, it is probably stored in a different folder from your proofing tools folder. To use a custom dictionary that's stored in any other location, do this:

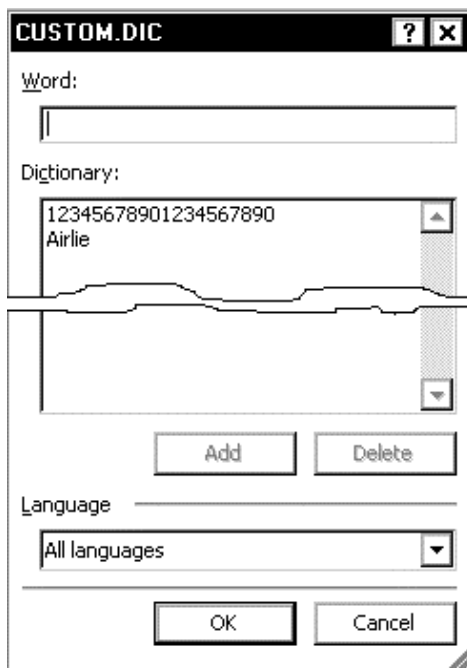
1. On the Custom Dictionaries dialog (Figure 14), click **Add**.
2. On the Add Custom Dictionary dialog, type the path and name of the custom dictionary you want to add, or browse for the file in the usual way. Click **OK**.
3. Back on the Custom Dictionaries dialog, make sure the checkbox for the added dictionary is selected, then click **OK**.

To create a new custom dictionary:

1. On the Custom Dictionaries dialog (Figure 14), click **New**.
2. On the Create Custom Dictionary dialog, type a name for your new dictionary, then click **Save**.
3. Back on the Custom Dictionaries dialog, make sure the checkbox for the added dictionary is selected, and then click **OK**.

You can add words to a custom dictionary in two ways.

1. Open the dictionary (click **Modify** on the Custom Dictionaries dialog, Figure 14). In the CUSTOM.DIC dialog (Figure 15), type or paste the words, one at a time, into the **Word** box at the top and click **Add** after each entry.



### Tips

To change an entry, add the correct word and delete the incorrect word.

You can also edit custom dictionaries directly. To do this:

- a. Open the .DIC file in a text editor such as Notepad. Dictionary files are located in the PROOF folder; the location varies with the version of Windows. See “Create and use an exclude dictionary” on page 14 for the location.
- b. Type or paste the words one to a line.
- c. Save the file. Be sure it is saved as plain text, but the file extension must be .DIC.

Figure 15. Adding a word directly to a custom dictionary

2. While checking spelling, click **Add to Dictionary** on the Spelling and Grammar dialog (Figure 16) when a correctly spelled word is highlighted in the **Not in Dictionary** box.

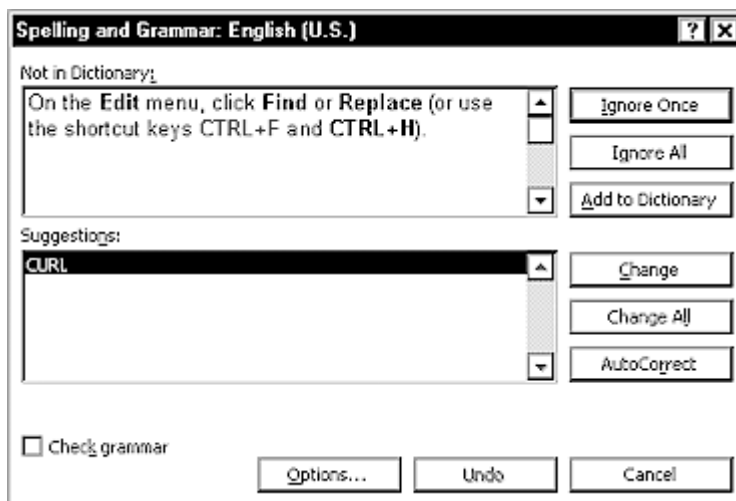


Figure 16. Adding a word to the custom dictionary while checking spelling

## Create and use an exclude dictionary

You can use an exclude dictionary to find correctly spelled words that are not the right ones for the situation or not your preferred spelling.

After you add words to the exclude dictionary, the spelling checker will question them the next time you check spelling. You can then decide whether the word is the correct one or change it if necessary.

1. Click the **New Blank Document** button on the toolbar, or press **CTRL+N**.
2. Type the words that you want to put in the exclude dictionary. Press Enter after each word.
3. On the menu bar, click **File > Save As** and navigate to the required folder.

In Windows ME or NT 4.0,

C:\Windows\_folder\Profiles\User\_name\Application Data\Microsoft\Proof

In Windows 2000 or later,

C:\Program Files\Common Files\Microsoft Shared\Proof

In Windows 98,

either C:\Windows\_folder\Application Data\Microsoft\Proof folder or

C:\Windows\_folder\Profiles\User\_name\Application Data\Microsoft\Proof

4. In the **Save as type** box, click **Plain Text**.
5. In the **File name** box, type a name for the exclude dictionary. This name must be the same name as the main language dictionary it's associated with, except for the file extension, which must be **.exc**.

For example, the English dictionary is named Mssp3en.lex, so you would name the associated exclude dictionary Mssp3en.exc.

6. Click **Save**. In the **File Conversion** dialog box, select the options you want, and then click **OK**.
7. Close the file. To activate the new exclude dictionary, restart Word.

You can edit this file any time you want, to add or delete words. If you want to disable it, you can delete it or rename it or move it to a different folder.

## Ensuring your user information is correct

Because Word's revision features mark your changes and comments with the name or initials stored in User Information, you'll want to ensure that your name and initials appear there. To do this, choose the **User Information** tab on the Options dialog (Figure 17). If anything on this page is incorrect, delete it and type the correct information. Click **OK** after making any changes.

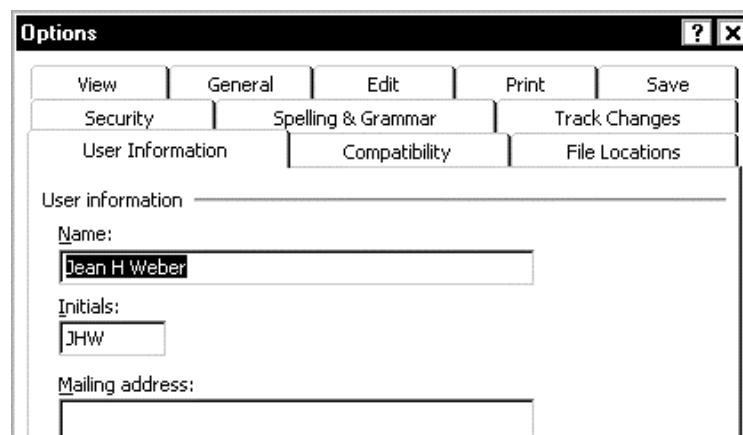


Figure 17. Checking user information

## Controlling Word's AutoCorrect functions

Some of Word's AutoCorrect functions I find very useful; others cause more trouble than they're worth.

On the menu bar, click **Tools > AutoCorrect Options**.

The AutoCorrect dialog (Figure 18) has five tabs.

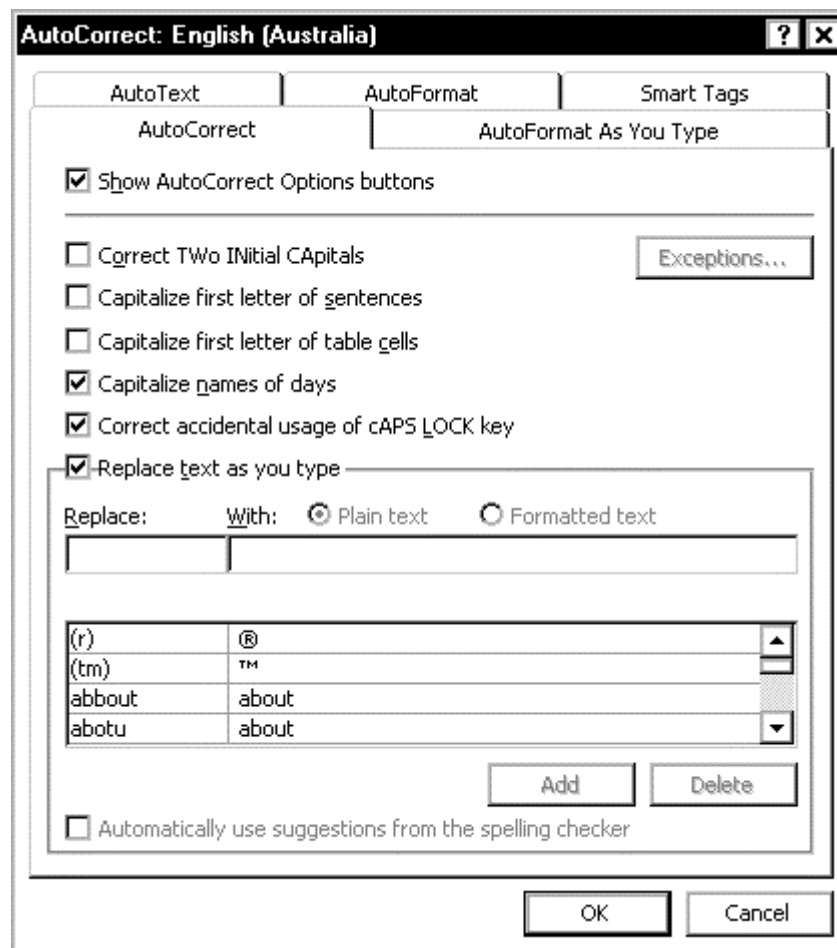


Figure 18. Choosing AutoCorrect options

### AutoCorrect

The AutoCorrect tab contains many useful functions; select the ones that suit the way you work. I recommend you go through the auto-replace list to look for things that you don't want to be changed automatically and delete them. For example, I deleted the one that replaces (c) with the Copyright symbol ©, because I use (a), (b), (c) a lot and having to override the change was extremely annoying.

### AutoFormat and AutoFormat As You Type

The AutoFormat and AutoFormat As You Type tabs (Figure 19) include several things that I dislike (but others find useful). The difference is that the AutoFormat tab settings are applied when you open a document, or when you go to the Format menu and click AutoFormat, not while you are typing.

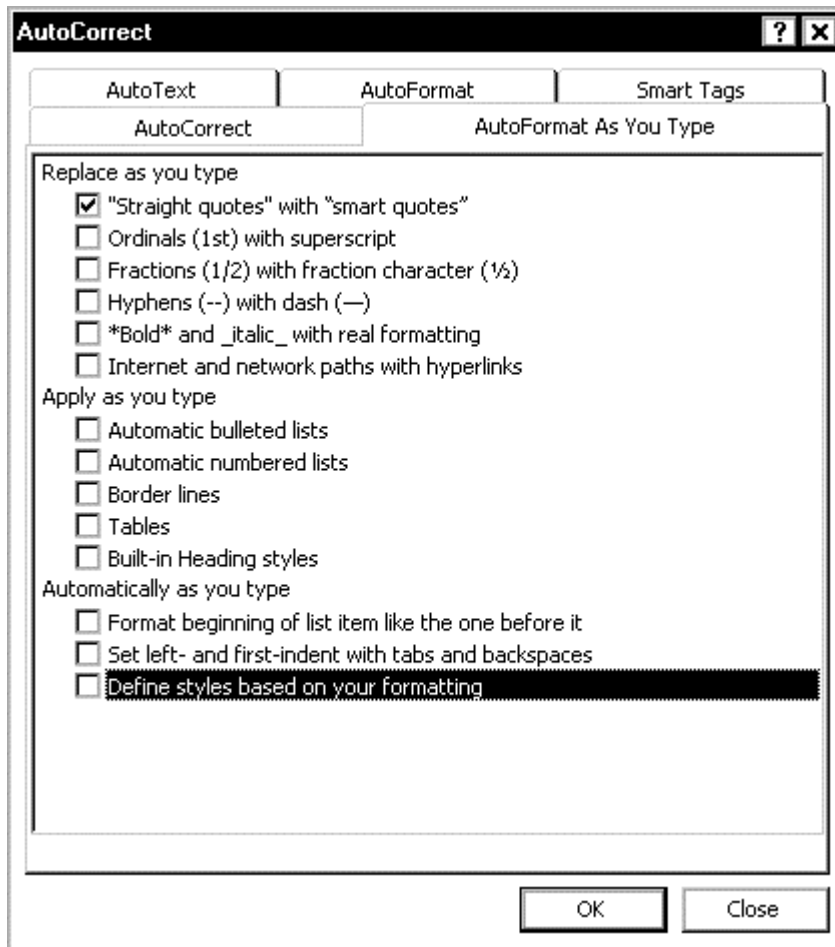


Figure 19. Choosing AutoFormat As You Type options

I deselect all the items on this page (except to replace “straight quotes” with “smart quotes”), because I don’t want Word to automatically format anything. Word’s internal logic often causes it to do things differently from what I want, and these autoformatting functions contribute to many of the problems that people have with numbered lists. (See also “Fixing or avoiding list numbering problems” on page 61.)

For some situations, having Word automatically replace Internet and network paths with hyperlinks can be very helpful. In my work, however, I normally don’t want hyperlinks; I want plain text.

### AutoText

The entries on the AutoText tab are very useful. See “Using AutoText fields to hold information that changes” on page 59 for more information.

### Smart Tags

If you plan to use smart tags, use this tab to specify what types of data are tagged. For more about smart tags, see page 96.



## Sharing documents with people using a different version of Word

If you work with people who use a different version of Word, you and they need to follow a few simple rules to avoid making a mess of any documents you share.

- Avoid using features that are not supported by the oldest version of Word being used in the group. Lists of differences, and what happens to unsupported features when you save in an older format, are provided in the online help.
- Disable the new features in Word 2002 by going to the Save page in the Options dialog (Figure 5), selecting the checkbox for **Disable features introduced after**, and specifying the version of Word that the other person uses.

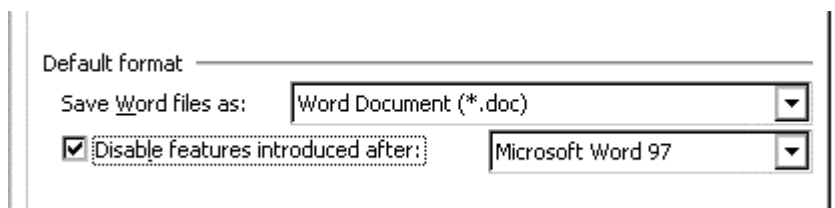


Figure 20. Disabling features introduced after Word 97

- On the menu bar, click **Tools > Options**, then choose the **Compatibility** tab (Figure 21). In the **Recommended options for** box, choose the version you want, then click **OK**.

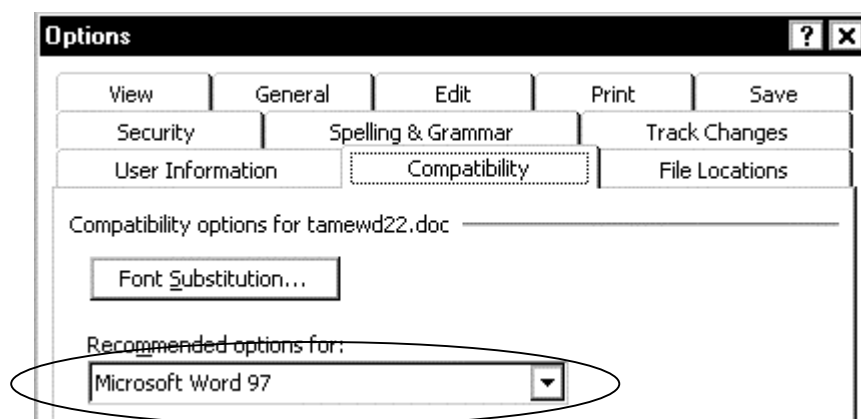


Figure 21. Setting compatibility options for Word 97

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**Tip** To help you remember to save Word 2002 documents in an earlier Word format, you can specify the default format in which to save documents. On the menu bar, click **Tools > Options**, then choose the **Save** tab. In the **Save Word files as** box, click the file format you want. The next time you save a document that is not already saved in Word 2002 format, you will be prompted to save it in the format you selected.

---

### *Installing more than one version of Word on the same computer*

If you frequently need to work on projects using different versions of Word, you can install and use more than one version of Microsoft Office (or any of its components) on the same computer.

1. If you already have one version of Office on your computer, when you start the installation of the newer version, **be sure to select the Custom Installation** option.
2. When prompted, **change the installation location** to a different folder from the one suggested, **so it is not the location of the older version** of Office.
3. When prompted, **select the option to keep all previous versions of Office** on the computer.
4. Complete the rest of the installation.

---

**Tips** Start menu shortcuts for the earlier version of the Office programs will be overwritten by the shortcuts for Office XP, but you can manually add new shortcuts for the earlier version of Office.

Don't try to install an earlier version of Office on a machine that already has Office XP installed on it. If necessary, uninstall Office XP, install the earlier version of Office, then re-install Office XP.

---

### *Advanced tips*

See Chapter 8, "Miscellaneous tips and tricks" for some advanced tips, including:

- Customizing toolbars and menus
- Using the Work menu
- Navigating through a document
- Using smart tags—or not

## Editing and reviewing documents

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Word provides many ways for individuals and workgroups to edit, review, and comment on documents. This chapter covers some of those techniques, plus a few other editing tips.

- Checking spelling and grammar
- Finding and replacing text and formatting
- Marking and tracking changes
- Inserting comments and questions
- Accepting or rejecting editorial changes and comments
- Changing the font and text size in balloons and the Reviewing pane
- Printing
- Exchanging files with other versions of Word: some incompatibilities
- Undoing edits
- Selecting a vertical block of text
- Selecting items that are not next to each other: new in Word 2002
- Changing document properties
- Automating your editing

### *Checking spelling and grammar*

Although software won't find correctly spelled wrong words, the spelling checker can be useful for a first cut. Used in combination with an exclude dictionary, you can even find words that are wrongly used; see page 12 for details. The spelling checker is also good for finding doubled words such as *the the*.

"Preparing for spelling and grammar checking" on page 9 described how to set up Word. This section describes some features you might find useful:

- Ignore some text while checking spelling and grammar
- Recheck spelling in a document (if the spelling checker says there's nothing to check)

### Ignore some text while checking spelling and grammar

To mark full paragraphs of text (such as code samples) to be ignored while checking spelling and grammar, create a *paragraph style* that specifies the language as Do Not Check Spelling or Grammar.

To mark part of a paragraph, create a *character style* that specifies the language as Do Not Check Spelling or Grammar. Select the words you don't want checked and apply the character style to them.

For more information, see "Define a new style" on page 53.

---

**Tip** For single words or phrases that are used frequently in a document, a better solution is to add them to a custom dictionary. That way they're checked but not flagged as errors unless you mistyped them. See "Create and use a custom dictionary" on page 12.

---

### Recheck spelling in a document

After you run the spelling checker over a document, if you want to check it again, Word doesn't check the same material twice; it only checks new or changed material. This can be quite helpful with long documents, by saving time, but if you do want to check everything again, you'll need to do this:

1. Click **Tools > Options** and choose the **Spelling & Grammar** tab (Figure 11). Click the **Recheck Document** button. (If the document has not previously been checked, this button is labeled Check Document.)
2. At the message asking if you're sure you want to do this, click **Yes**.

### Check index entries and other hidden text

Index entries are formatted as hidden text. The spelling checker won't check them unless you first display hidden text. You can do this in these ways:

- Click the **Show/Hide** button on the standard toolbar.
- or
- Press **CTRL+ \*** (asterisk).
- or
- On the menu bar, click **Tools > Options**, choose the **View** tab (Figure 6), and check the **Hidden Text** entry in the Formatting Marks group.

### *Finding and replacing text and formatting*

Even the simplest search can make editing faster and easier.

1. On the menu bar, click **Edit > Find** or **> Replace** (or use the shortcut keys **CTRL+F** and **CTRL+H**).
2. On either the **Find** tab or the **Replace** tab, click the **More** button to display the long version of the dialog.

Using the choices in the lower half of the dialog, you can:

- Search for and replace specific formatting and special items such as paragraph marks, fields, or graphics
- Use wildcards to fine-tune a search

### Replace manual formatting with styles

One handy use for replacing formatting includes finding manually underlined words and replacing them with a character style that includes underlining or italics. I'm sure you can find many other uses.

On the Find and Replace dialog (Figure 22):

1. To search for text with specific formatting, enter the text in the **Find what** box. To search for specific formatting only, delete any text in the **Find what** box.
2. Click **Format**, and then choose the formats you want from the list.

3. To replace text, enter the replacement text in the **Replace with** box.  
To remove text, delete any text in the **Replace with** box.  
To remove the specified character formatting, click **Format**, select **Font**, then select the opposite format (for example, **Not Bold** or **No Underline**).
4. Click **Find Next**, **Replace**, or **Replace All**.

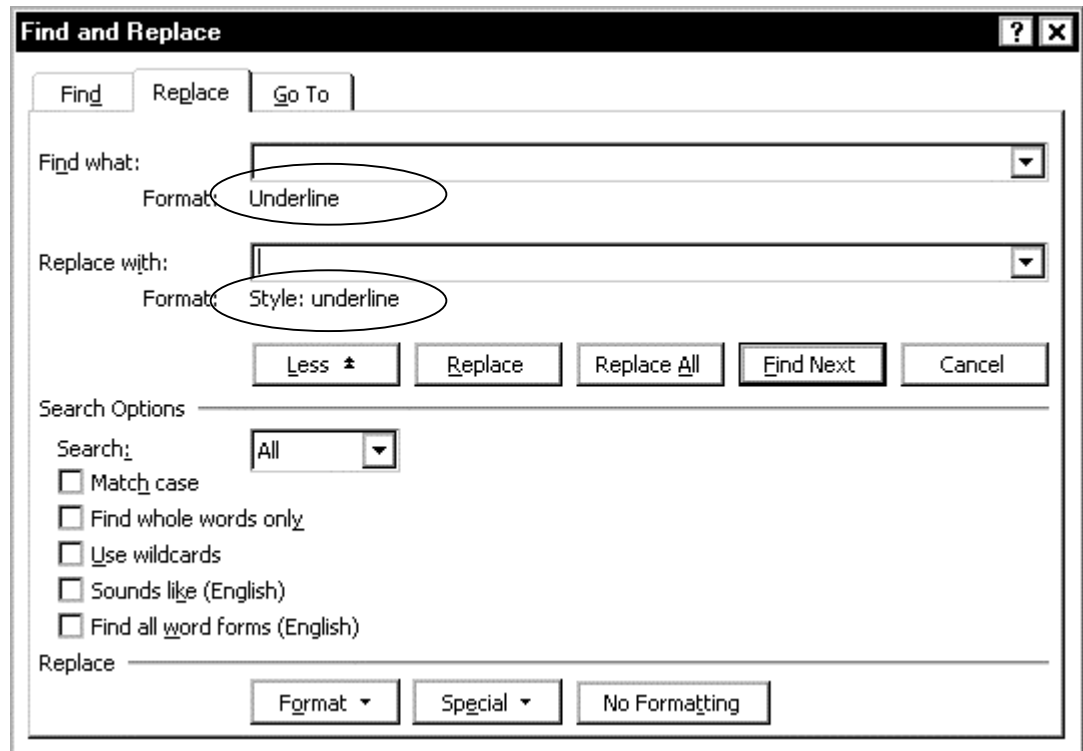


Figure 22. Finding and replacing manual formatting with a paragraph style

**Tip** Many formatting changes can be done more quickly using the new **Styles and Formatting** task pane. For an example, see “Remove unwanted and unused styles from a document” on page 55.

### Find and replace paragraph marks, page breaks, and other items

Common uses for this function are to replace two paragraph marks with one, or to remove tabs used to indent the first line of a paragraph. (If spacing and first-line indenting are required, you should use paragraph styles; see “Define a new style” on page 53).

On the Find and Replace dialog:

1. Click once in the **Find what** box, then click **Special**.
2. Choose the item you want from the pop-up list.  
You can also type a code for the item directly in the **Find what** box.
3. If you want to replace the item, click once in the **Replace with** box (or press **Tab** to move from the **Find** box). Enter what you want to use as a replacement in the **Replace with** box. To use another special item, click **Special** and follow the instructions in step 2.
4. Click **Find Next**, **Replace**, or **All**.

## Find items such as bookmarks or comments

For a quick way to find items such as bookmarks, graphics, or comments:

1. Press **CTRL+G**, or click **Edit > Find and Replace** and choose the **Go To** tab, and then click the item you want in the **Go to what** box.
2. You can click **Next** or **Previous** to find the next or previous item of the same type, or type a number in the **Enter (object) number** box if you know the sequence number of the table, graphic, bookmark or other object you are searching for.

## Plan a multiple-pass find and replace

Find and replace is a powerful feature, but it can be dangerous if you don't do a bit of planning first. You must consider the consequences of each step, so you do them in the correct order.

### Example: replacing the formatting in part of a string of characters

Suppose you need to replace a string of characters in which one is a subscript or superscript (for example H<sub>2</sub>O with H<sub>2</sub>O) in a document where these occur frequently. Here are the steps you would take:

1. Replace all occurrences of H<sub>2</sub>O by (subscript) H<sub>2</sub>O. Now you have H<sub>2</sub>O.

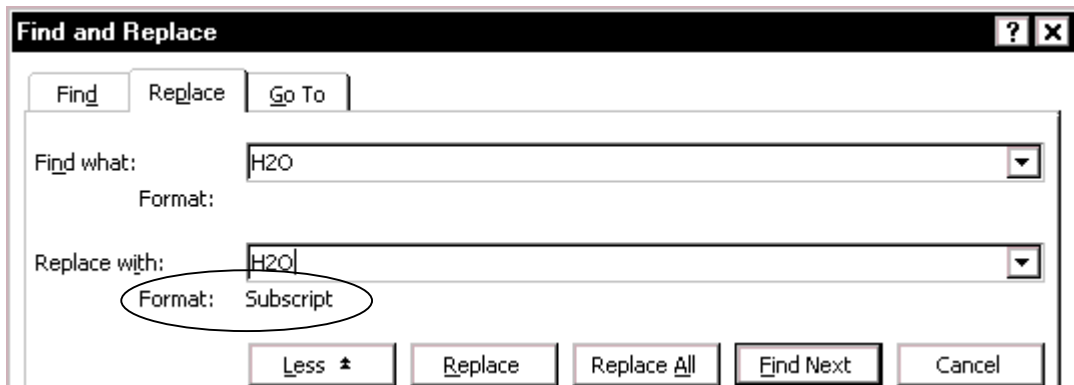


Figure 23. The first step of a multiple-pass find and replace

2. Replace all occurrences of (subscript) H with normal H. Now you have H<sub>2</sub>O.

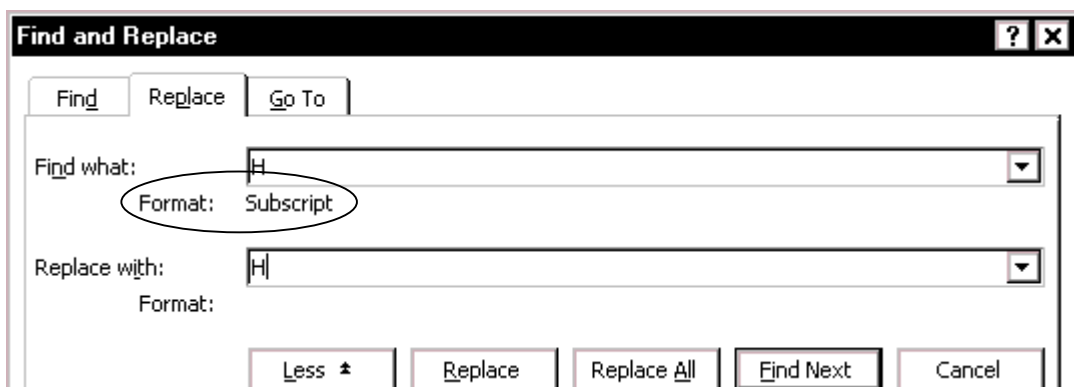


Figure 24. The second step of a multiple-pass find and replace

3. Replace all occurrences of (subscript) O with normal O. Now you have H<sub>2</sub>O.

## Use wildcards

A wildcard is a keyboard character that can be used to represent one or many characters when you are searching for something.

Once you get used to wildcards, you'll wonder how you ever did without them. Most people are comfortable with some of the simpler constructions but find the more complex ones a bit daunting. I can only suggest that a bit of practice will pay off well in time saved later.

To use wildcards when searching and replacing:

1. On the Find and Replace dialog (Figure 22), select the **Use wildcards** checkbox (you may need to click the **More** button to see the checkbox).
2. Click **Special**, then click a wildcard from the Special list (which now shows wildcards in addition to some other special characters). Type any additional text (before or after the wildcard) in the **Find what** box.

If you can remember the wildcards you need, it's much faster to type them directly into the **Find what** box.

3. Click **Find Next**, **Replace**, or **Replace All** (not recommended).

If you're replacing text, it's a good idea to click **Replace** instead of **Replace All**; that way, you can confirm each replacement to make sure it's correct. Otherwise you're likely to end up with some hilarious (and highly embarrassing) bloopers.

Table 1. Examples of search wildcards

To find	Use this wildcard	Examples
Any single character	?	b?d finds "bad," "bud," "bid" and "bed."
Any string of characters	*	b*d finds "bad," "brand" and "board."
One of the specified characters	[ ]	b[iu]n finds "bin" and "bun."
Any single character in this range	[-]	[r-t]eed finds "reed," "seed" and "teed." Ranges must be in ascending order.
Any single character except the characters inside the brackets	[!]	p[!a]st finds "post" and "pest," but not "past."
Any single character except characters in the range inside the brackets	[!x-z]	b[!a-m]ck finds "bock" and "buck," but not "back" or "beck."
The beginning of a word	<	<(log) finds "logbook" and "logistics," but not "catalog."
The end of a word	>	(log)> finds "catalog," but not "logistics."

### Notes:

1. More wildcards and their uses are described in the online help.
2. To search for a character that's defined as a wildcard, type a backslash (\) before the character. For example, to find a phrase that includes a question mark (such as "how?"), you would search for "how\?".

## Marking and tracking changes

You can use several methods to keep track of changes made to a document. Which method you use, and whether you need to keep a record of changes, depends on your company's or client's policy.

- You can make your changes to a copy of the document (stored in a different folders, or under a different name, or both), then use Word to compare the two files and show the changes you made. On the menu bar, click **Tools > Compare and Merge Documents**. This technique is particularly useful if you are the only person working on the document, as it avoids the increase in file size and complexity caused by the other methods.
- You can save versions which are stored as part of the original file, but this method can cause problems with documents of any size or complexity, especially if you save a lot of versions. Avoid this method if you can.
- You can use Word's revision marks to show what you have added, deleted, changed, or moved. Later, you or another person can review and accept or reject each change. These techniques are described in detail in this chapter.

### Prepare a document for editing or review

Although you (or your editor or reviewers) can use Word's revision feature to mark up a document that has not been prepared for review, you may want to do the preparation step first. The advantage of this step is that the editor or reviewer can't forget to turn on the revision marks.

To prepare a document for editing or review:

1. Open the document. Check whether it contains multiple versions by clicking **File > Versions**. If multiple versions are listed, save the current version as a separate document with a different name, and use this new document as the review copy.
2. With the review copy open, click **Tools > Protect Document**.
3. On the Protect Document dialog (Figure 25), select what you want the reviewers to be able to do.



Figure 25. Setting up a document to ensure any changes are tracked

- To let reviewers change the document and insert comments, and to track all the changes, select **Tracked Changes**.
- To let reviewers insert only comments and not change the contents of the document, select **Comments**.
- To let only authorized reviewers add changes and comments, type a password. Make sure you keep a record of the password!



Edit (review) the document

1. If the Reviewing toolbar is not visible, click **View > Toolbars > Reviewing** to display it.
  - If the document has been prepared for editing, the **Track Changes** button will be “on” (gray background) and you will not be able to turn it off.
  - If the document has not been prepared for editing, be sure to turn on the Track Changes feature before you start editing.



Figure 26. Choosing view options from the Reviewing toolbar

2. Click the **Show** button on the Reviewing toolbar and choose what you want to see during editing and reviewing. For example, if you do not select Insertions and Deletions, you will see only the results of your changes. You can turn this setting on and off as often as you wish.
3. To set up how your changes will be displayed, click **Options** at the bottom of this menu to display the Track Changes dialog (Figure 27).

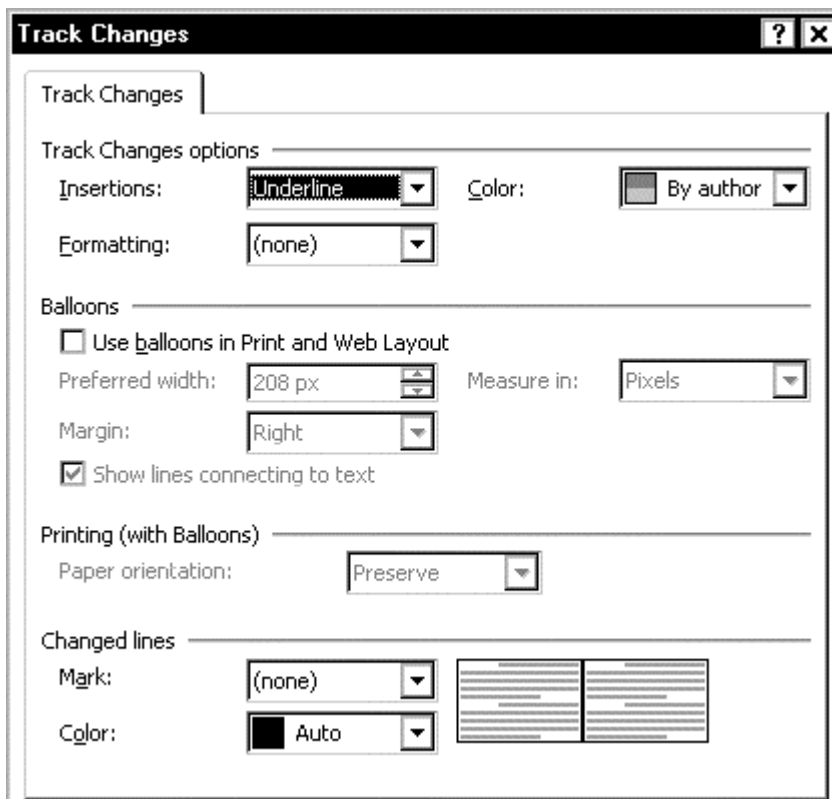


Figure 27. Choosing how your changes will be displayed

- On the Track Changes dialog, you can choose colors and presentation (underline, strikethrough, italics, and so on) for inserted text, choose whether to show "change bars" in the margins (and if so, what character to use), and whether to mark formatting changes. You cannot make insertions and deletions appear in different colors.

**Tip** Displaying markup (insertions and deletions) on screen will often change the pagination of the document, so don't regenerate the index or table of contents, or update any other fields that show page numbers, until you turn off the display of markup. To do this, go back to the Reviewing toolbar and click on **Insertions and Deletions** to remove the checkmark.

## Use balloons or not

A major new feature in Word 2002 is the choice of displaying changes in balloons in the margin of the document. You can switch between showing or not showing balloons whenever you want. Try both to see which you prefer.

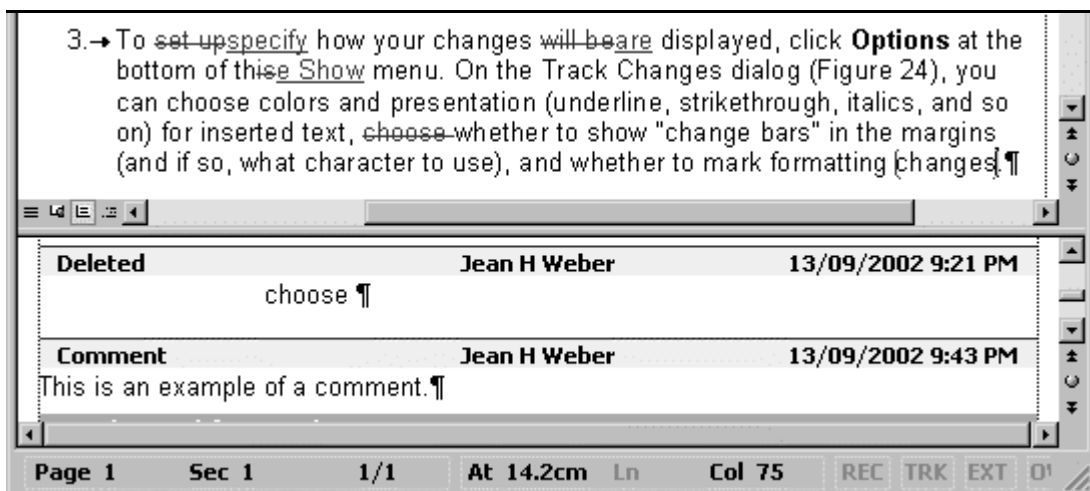


Figure 28. Reviewing pane and markup without balloons

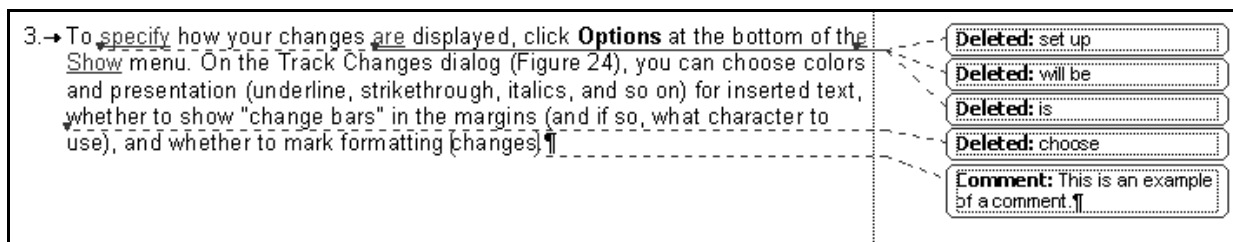



Figure 29. Markup using balloons (you can display the Reviewing pane at the same time)

## Inserting comments and questions

To insert a comment:

- Select the text you want to comment on.
- On the Reviewing toolbar, click the **New Comment** button . Word encloses the selected text in parentheses, open the Reviewing pane (if it is not already open) and positions the insertion point in the comment area of the reviewing pane.
- Type your comment. If you're using balloons, Word displays the comment in a balloon as well as in the Reviewing pane, as shown in Figure 29.

To view a comment, be sure **Comments** is selected on the **Show** menu (Figure 26). Then you can do one of the following:

- Turn on balloons (using the Track Changes dialog, as shown in Figure 27). The comments are displayed in balloons on the side of the page (see Figure 29).
- Move the mouse pointer over the comment marker. Word displays the comment and the name of the reviewer making the comment in a ScreenTip above the text. If comments don't appear, click **Tools > Options > View** tab, and then select the **ScreenTips** checkbox.
- If the Reviewing pane is not already open, click the **Reviewing Pane** button on the Reviewing toolbar to display it at the bottom of the window. Click the comment marker in the text to move the view in the Reviewing pane to the associated comment.

To edit a comment:

1. Click on the comment marker in the text, then right-click and choose **Edit Comment** from the popup menu.
2. The Reviewing pane opens (if it is not already open) and the insertion point is located at the beginning of the relevant comment.
3. Edit the comment as you would edit any text.

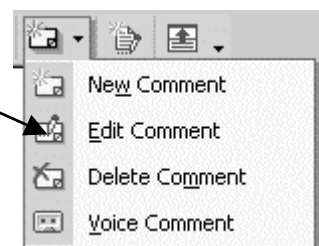


Figure 30. Comment menu

## Accepting or rejecting editorial changes and comments

Word provides several ways to work with editors' and reviewers' changes and comments. Here's how to:

- Incorporate reviewers' insertions and deletions
- Incorporate reviewers' suggestions made with comments

### Incorporate reviewers' insertions and deletions

Word 2002 provides a new Reviewing toolbar, but you can—if you prefer—restore the Accept or Reject Changes dialog from where it's been hidden.

#### Restore the old Accept or Reject Changes dialog

If you prefer to use the old Accept or Reject Changes dialog, you can get it back.



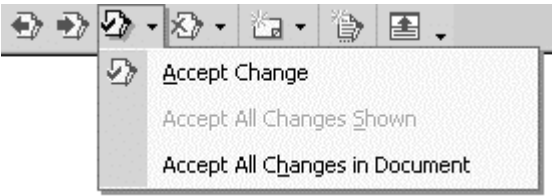
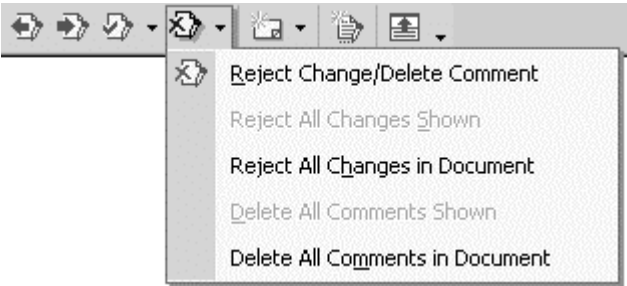
1. On the menu bar, click **Tools > Customize**. On the **Commands** tab of the Customize dialog, look in the **Categories** list and select **All Commands**.
2. In the **Commands** list, select **ToolsReviewRevisions** and drag it to a toolbar. Rename the button to something shorter, if you wish. Close the Customize dialog.

When you click on this new button, the old Accept or Reject Changes dialog appears. Use it as you did in Word 97 and Word 2000.

#### Use the new Reviewing toolbar

Make sure changes are highlighted on the screen and the Reviewing pane is open or balloons are showing.

If revision marks don't appear in the document, click **Show** on the Reviewing toolbar and click each item so they have checkmarks next to them. You can choose to view all reviewers' changes at the same time, or select one reviewer at a time, as shown in Figure 26.

To...	Do this...
Review one change at a time	Click the <b>Next</b>  or <b>Previous</b>  buttons on the Reviewing toolbar.
Accept the change	Click the <b>Accept Change</b> button.
Reject the change	Click the <b>Reject Change</b> button.
Accept all changes in one pass	Click the arrow next to the <b>Accept Change</b> button, then click <b>Accept All Changes in Document</b> . 
Reject all changes in one pass	Click the arrow next to the <b>Reject Change</b> button, then click <b>Reject All Changes in Document</b> . 
Delete selected comment	Click the arrow next to the <b>Reject Change</b> button, then click <b>Reject Change/Delete Comment</b> .
Delete all comments in one pass	Click the arrow next to the <b>Reject Change</b> button, then click <b>Delete All Comments in Document</b> .

### Incorporate reviewers' suggestions made with comments

1. Click on the comment marker in the text, then right-click and choose **Edit Comment** from the popup menu (Figure 30).
2. In the Reviewing pane (Figure 28), select and copy the comment text or item.
3. Paste the text or item in the document where you want it to appear.

### Changing the font and text size in balloons and the Reviewing pane

To change the text font used in the Reviewing pane and the balloons, change the Comment Text style.

To change the text size used in the balloons, change the Balloon Text style.

See "Change a style" on page 51 for instructions on how to change a paragraph style.

If you can't see the Comment Text or Balloon Text styles in the list of styles, click Custom in the Show box at the bottom of the Styles and Formatting task pane, then select those styles in the Format Settings dialog.

## Printing

Before printing the document, decide whether you want all the markup to be printed, or whether you want a copy that shows only the results of the changes.

- To print all the markup, open the Print dialog (on the menu bar, click **File > Print**, or press **CTRL+P**; don't click the Print button). In the **Print What** box, choose **Document Showing Markup**.
- To print a copy showing only the results of the changes, choose **Document** in the **Print What** box.

If you're going to print the document showing the changes in balloons, you may want to print it in landscape format. Set this in the Track Changes dialog (Figure 27), in the **Printing (with Balloons)** section.

## Exchanging files with other versions of Word: some incompatibilities

If you exchange files with people using earlier versions of Word, you will find that any comments inserted using Word 2002 will not be handled correctly by Word 97 or Word 2000. Therefore, it's best to not do this, if you can avoid it.

- Comment markers inserted by Word 2002 are not visible when the file is opened in the earlier version of Word.
- Comments inserted by Word 2002 are visible in the Comment pane in the earlier version of Word, but the comments are not color-coded.
- The Next and Previous buttons (or the equivalent keys) in the earlier version of Word do not move to comments inserted by Word 2002.

Insertions and deletions marked by Word 2002 display correctly in earlier versions of Word, and the Next and Previous buttons move correctly to them.

If you open in Word 2002 a file created or modified in Word 97 or Word 2000, any comments, insertions, and deletions are correctly displayed. Therefore, if you are the last person to deal with the file and you are using Word 2002, you should be able to review all the changes without problems. But if the last person to deal with the file is using an earlier version of Word, reviewing is likely to be difficult.

## Undoing edits

You can select **Undo** from the **Edit** menu, or press **CTRL+Z** on the keyboard, or click the **Undo** button, to undo a series of edits or other actions, one at a time, working backward from the last action.

You can also click the arrow next to the Undo button to see a list of the most recent actions you can undo. Scroll through the list until you find the action you want to undo, then click on it. Be careful, though: when you undo an action selected this way, you also undo all actions above it in the list. That result might not be what you want.

## Selecting a vertical block of text

If data from an outside source, such as a text file or spreadsheet, is pasted into a Word document, the pasted material may contain extra spaces at the beginning of each line. You could use find-and-replace to delete the extra spaces, but that technique might also delete groups of spaces that you want to keep in your document. An alternative is to select a vertical block of text that contains all the spaces.

To select a vertical block of text using the mouse, point to the upper left-hand corner of the block, hold down the **ALT** key, and then drag the mouse to the lower right-hand corner of the block, or press **ALT+SHIFT** and click at the lower right-hand corner of the block.


To select a vertical block using the keyboard, position the insertion point at the upper left-hand corner of the block, press **CTRL+SHIFT+F8**, and then use the arrow keys to highlight the whole block; press **ESC** to cancel selection mode.

### *Selecting items that are not next to each other: new in Word 2002*

In Word 2002, you can now select items that aren't next to each other in your document, but you can't select both inline items (text and tables or graphics that move with text) and floating objects (such as graphic elements that text flows around).

To select items of the same type that are not next to each other, select the first item you want, then hold down the CTRL key and select any additional items—just as you would select non-adjacent files or other items in a list in many other situations using Windows.

A variation is to select all text with the same formatting:

1. Make sure **Keep track of formatting** is selected in **Tools > Options > Edit** tab.
2. Open the Styles and Formatting task pane (click the **Styles and Formatting**  button on the formatting toolbar, or click **View > Task Pane** on the menu bar and select **Styles and Formatting**).
3. In the document, click a word that's formatted the way you want.
4. In the Styles and Formatting task pane, click **Select All**.

### *Changing document properties*

Many people copy one document (often written by someone else, or for a different project) when they create another, and don't change the document properties. If you don't catch these inconsistencies, they can end up being quite embarrassing for someone.

To change document properties:

1. On the menu bar, click **File > Properties**.
2. On the Properties dialog, check all the fields on the **Summary** tab, in particular **Title** and **Author**, and change anything that needs amendment. Click **OK**.

For other uses of document properties, including those on the Custom tab, see "Using document properties to hold information that changes" on page 57.

### *Counting the number of words*

In addition to the usual **Tools > Word Count** function, Word 2002 has a **Word Count** toolbar. You can use this toolbar to check the word count in a document without having to open the Word Count dialog. To display the toolbar, click **View > Toolbars > Word Count** or click Show Toolbar on the Word Count dialog.

### *Automating your editing*

You can automate some editing tasks by writing macros or using macros supplied by other sources, such as The Editorium and the Electric Editors. See Appendix A, "For more information" on page 99.

Those macros are supplied in the form of an add-in template which you install as a global template. See "Using templates and styles effectively" on page 45 for more information about global templates and add-ins.

# Chapter 3

## Controlling page layout

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Word provides many ways for you to control page layouts. Some of these ways involve templates and styles, described in Chapter 4.

This chapter covers:

- Changing page layouts
- Editing headers and footers
- Changing page numbers between sections of a document
- Using tables, text boxes, and frames for page layout
- Some tips for taming tables
- Putting portrait headers on landscape pages
- Keeping a caption with a table or figure
- Editing facing pages
- Controlling tabs

### *Changing page layouts*

To change paper size, margins, and some aspects of layout: on the menu bar, click **File > Page Setup**.

Be careful what's showing in the **Apply to** box: if your document has more than one section, this setting defaults to "This section," which can cause serious disruption of the document if that's not what you intended.

### Create a new section

Use sections if you need to have different settings for different parts of a document. For example:

- A mixture of portrait pages and landscape pages
- A mixture of single column and double column layouts, on the same page or different pages
- Different page numbers in different parts of the document, such as no numbers on the title page, roman numerals in the front matter, and arabic numerals (starting at 1) in the body of the document.

You can insert a section break in two ways:

- On the **Layout** tab of the Page Setup dialog (Figure 31), choose the settings and then choose **This point forward** in the **Apply to** box; Word will insert a section break at the insertion point location. Be careful! If the insertion point is in the middle of a paragraph, that's where the section break will occur.

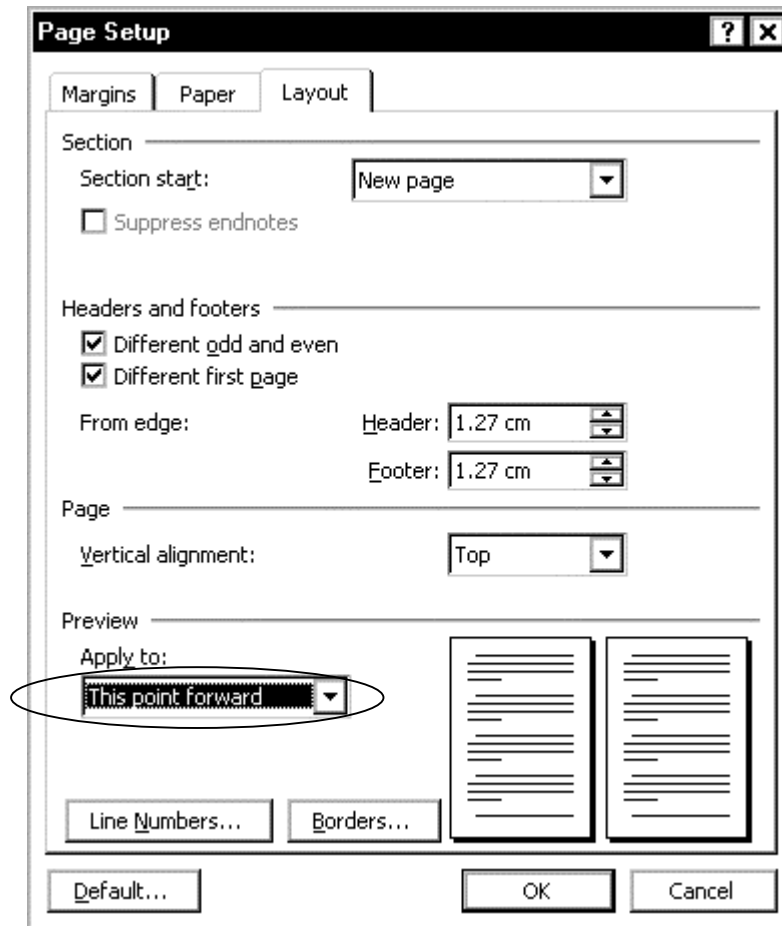


Figure 31. Starting a new section using the Page Setup dialog

- Insert the section breaks in the file (on the menu bar, click **Insert > Break** and choose the required type of section break on the Break dialog, Figure 32), then open the Page Setup dialog and choose settings for **This section only**. This is the recommended technique.

Consult the online help for explanations of the available **Section breaks** choices.

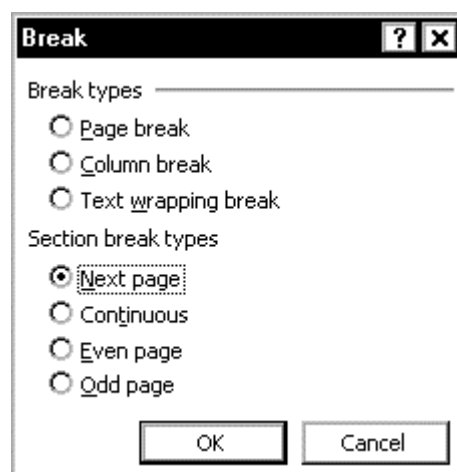


Figure 32. Starting a new section using the Break dialog



In most cases, if I have started a new section on a new page, I do **not** want it to carry over the header and/or footer from the previous section, so I immediately open the Header and Footer toolbar (on the menu bar, click **View > Header and Footer**) and **deselect** the **Same as Previous** button. For more about headers and footers, see “Editing headers and footers” on page 34.

## Change page margins

Page margins are the area between the edge of the paper (defined on the Margins tab of the Page Setup dialog) and the text area. If you must use a specific width for the text area, you’ll need to make some calculations to determine how wide to set the margins.

1. On the menu bar, click **File > Page Setup**, make sure the correct paper size is selected on the **Paper** tab, then choose the **Margins** tab (Figure 33).

Some definitions:

- The Gutter area is added to the binding edge of the page. For a single-sided layout, the gutter is always on the left. For a double-sided layout, select the Mirror margins checkbox; the gutter is now on the left of right-hand pages and on the right of left-hand pages. If you don’t want a wider margin on the binding edge, you can change the gutter size to zero.
- The Header and Footer margins are measured from the top and bottom of the page, respectively. You must make sure that the Top and Bottom margins are larger than the Header and Footer margins.

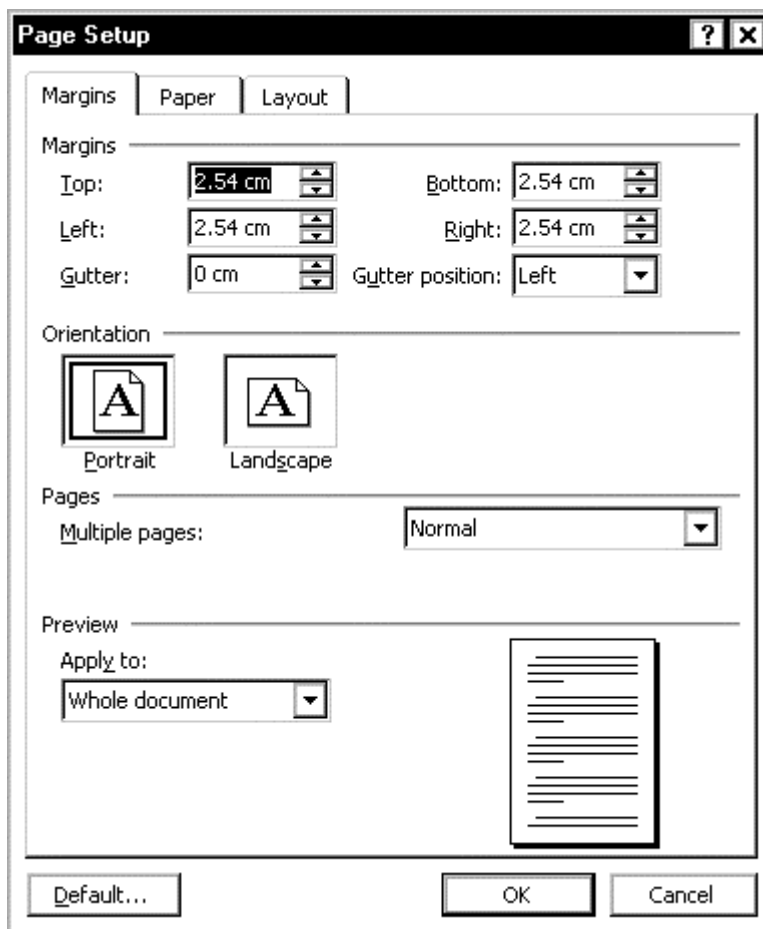


Figure 33. Changing page margins

2. Specify the margins, then make sure the **Apply to** box shows what you want.

Usually you want your changes to apply to the whole document, but you might, for example, want to change the margins on a landscape section of your document, to make a wider top or bottom margin (to allow for a binding edge when a landscape page is bound in with portrait pages). See “Create a new section” on page 31.

**Note:** You can change the right and left margins, but not the top or bottom margins, in the middle of a page. You can also create the effect of changed right and left margins by using frames or paragraph styles, but unless you’re trying to put together a complicated layout such as a newsletter, you’re better off starting sections—and changing margins—on a new page. (And if you are responsible for the layout of something complicated, you need to learn a lot more Word layout tricks than I can cover in this book.)

## Editing headers and footers

To edit headers and footers: on the menu bar, click **View > Header and Footer**, or double-click in the header or footer area of the page. The Header and Footer toolbar appears.

To specify different headers and footers on odd and even pages, or on the first page of a section:

1. On the menu bar, click **File > Page Setup**. (Or click the **Page Setup** icon on the Header and Footer toolbar.)
2. On the **Layout** tab of Page Setup dialog (Figure 34), select the appropriate checkboxes. Be sure the **Apply To** box shows **Whole document** or **This section** (if you want to change footers in a new section). Click **OK**.

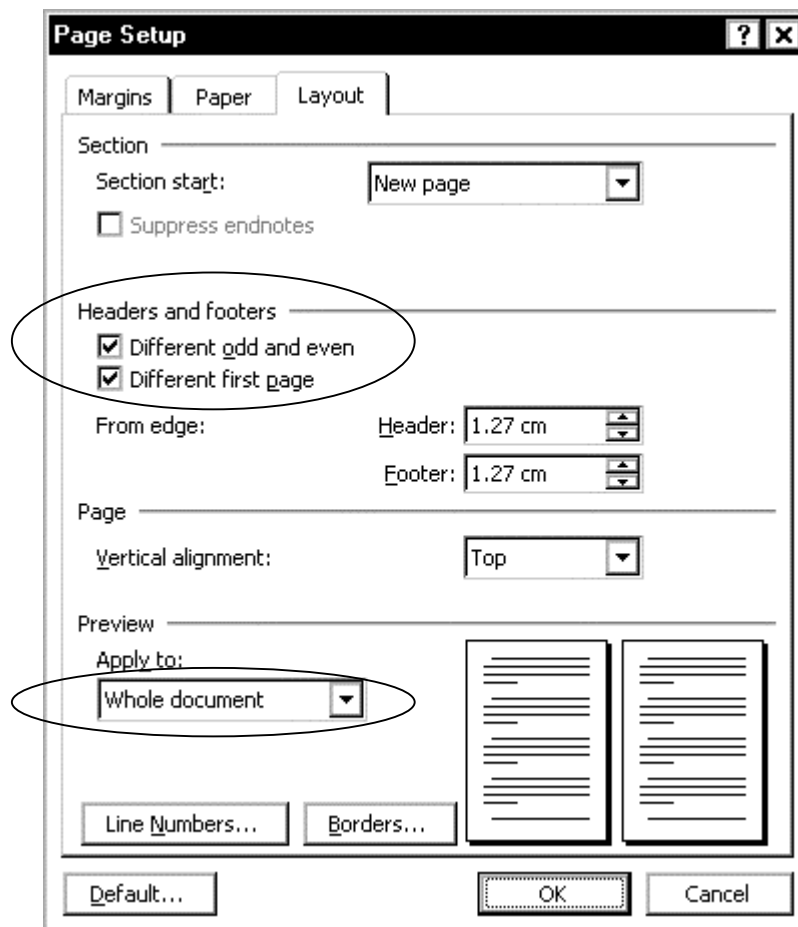


Figure 34. Specifying different headers and footers for first, odd and even pages

The left and right margins of the headers and footers are the same as the left and right margins of the page they are on. You can define the paragraph style of the header or footer to make its margins inside or outside the page margins, just as you can define the margins of any paragraph style.

You can type in the header or footer areas, or insert cross-references or other fields to include information such as the chapter title, the date, the author, and so on. To insert a page number, click the **Page Number** icon on the Header and Footer toolbar. For more information, see “Using fields in headers and footers” on page 69.

Define Word’s “Header” and “Footer” styles to suit the needs of your document. You can also define character styles for individual elements in the header or footer; for example, you could make the font for the page number large and bold, as I’ve done in this book. For more information on styles, see Chapter 4.

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**Tip** Avoid using floating pictures in a table in a header or footer. This combination can cause Word to repaginate as you scroll through a document—very annoying and tedious in a large document. Use an inline picture instead, or remove the table.

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### Changing page numbers between sections of a document

Here’s how to have different page numbers in different parts of the document. Let’s say you want to have no numbers on the title page and reverse page (located in section 1), roman numerals in the front matter (section 2), and arabic numerals in the body of the document (sections 3+).

You should have defined section 1 to have either no header and footer, or no page numbers.

1. Show the Headers and Footers toolbar. Position the insertion point in the header of section 2. If you have not already done so, click the **Same as Previous** button on the Headers and Footers toolbar to **deselect** it, then position the insertion point in the footer and click the **Same as Previous** button to **deselect** it.
2. Repeat for section 3. If you have each chapter in a separate section, repeat for each one.
3. Return to section 2. From the menu bar, click **Insert**, then **Page Numbers**. On the Page Numbers dialog (Figure 35), specify the position and alignment of the page numbers, or leave these fields as they are if you have previously inserted a page number into a header or footer. Choose whether to show the page number on the first page of the section. Click the **Format** button.

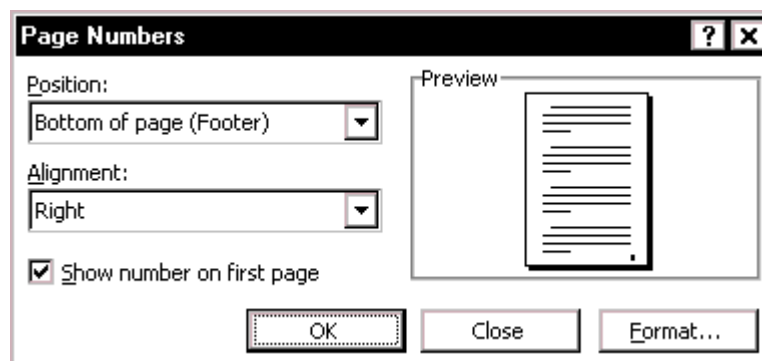


Figure 35. Specifying page number position

4. On the Page Number Format dialog (Figure 36), specify the number format (in this example, i, ii, iii), then click **Start at**. An “i” should appear in the Start at box. Click **OK**. Back on the Page Numbers dialog, click **Close**. Don’t click OK or you may end up having two page numbers on each page.

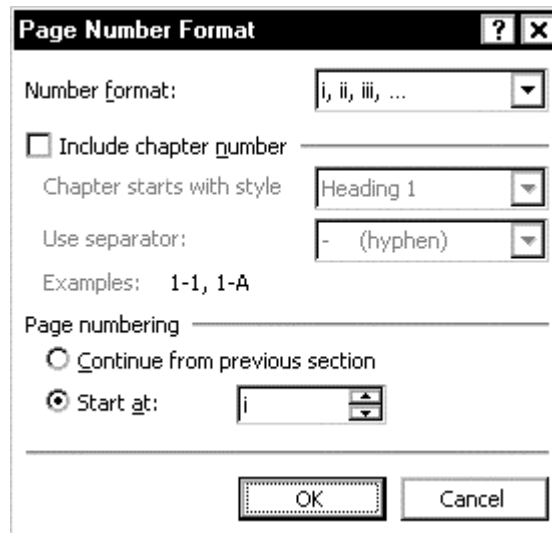


Figure 36. Specifying page number format

5. Go to section 3. Repeat steps 3 and 4, choosing “1,2,3” as the number format.
6. If you have more sections, go to the next one and repeat steps 3 and 4. If you are numbering all chapters sequentially through the document, set them to continue page numbering from the previous section.
7. Return to section 1. Quite often it will have picked up some header/footer formatting that you don’t want. Verify that section 2 has its header and footer set to not be same as previous, then remove the unwanted header/footer formatting from section 1.

### *Using tables, text boxes, and frames for page layout*

Depending on the complexity of your layout, you might find tables, text boxes, or frames useful in controlling the placement of text and graphics on the page. This section discusses some advantages and disadvantages of each method.

Used in moderation, or in small files (a few pages rather than hundreds of pages), all of these features can be very helpful.

However, all these features add complexity to a document, which can make Word run noticeably more slowly than usual, often confuses people maintaining documents they got from someone else, and can lead to behavior (such as graphics wandering away from the place you put them) that takes a long time to diagnose and correct.

#### Use a table for page layout

Word’s tables can serve several purposes:

- To present tables of data, similar to those you might see in a spreadsheet (sometimes these tables are imported from Excel or another program), and to perform some calculations
- To line up material that might otherwise be lined up using tabs and hanging indents
- To create page layouts by positioning various page elements in columns, or to line up graphics or sideheads in the margin with specific paragraphs

A full discussion of tables, their use, and how to control them is beyond the scope of this book. Word’s online help has a good overview of the parts of a table, the uses for tables, creating and formatting tables, solving problems with tables, and so on. For a different—and very helpful—view of all these topics, and some of the problems that you may encounter, see the following article on the MVP site, and several other

articles linked from it: "Table basics" by Suzanne S. Barnhill and Dave Rado, <http://www.mvps.org/word/FAQs/TblsFldsFms/TableBasicsContent.htm>

### Example of using a table for page layout

Sideheads and marginal notes are commonly used in documents from resumes to computer user guides. The main body of the text is offset to leave white space (usually on the left-hand side) in which the sideheads or notes are placed.

This book does not use sideheads, but it does have the word "Tip" in the margin area on some pages (for example, page 1). This effect is created by formatting a two-column, 1-row table with horizontal borders but no vertical borders. The offset layout of the main body of text uses styles.

### Use text boxes for page layout

Avoid using text boxes unless you really need them, because they add complexity to the document, can slow down the performance of Word, and may make the file size much larger.

Sometimes, a text box is exactly what you need to solve a problem. Common uses for text boxes include:

- Putting portrait headers and footers on landscape pages; see page 41
- Annotating graphics; see Chapter 7, "Working with graphics"
- Placing stories in a newsletter, especially when the story is continued on another page; see "Continue a story elsewhere with linked text boxes" in the online help

You cannot use some fields in text boxes, or cross-reference to the contents of a text box, so you can't put a heading in a text box and expect it to appear in the table of contents. Use a frame as the container instead. For details about the fields that don't work, see "The difference between a text box and a frame" in the online help.

### Use frames for page layout

In Word 2000 and 2002, text boxes have replaced most of the uses of frames in earlier versions of Word. However, you need to use frames instead of text boxes for positioning if your text includes comments, footnotes, endnotes, and some fields.

You can convert a text box to a frame and vice versa, without needing to recreate the contents. Instructions are in the online help.

You can add **Frame** to the **Insert** menu if you wish. Use the technique described in "Restore the old Cell Height and Width dialog" on page 40, selecting **InsertFrame** in the Commands box and dragging the command to the **Insert** menu.

### Some tips for taming tables

Word 2000 introduced many changes in table formatting. (These changes were intended to make Word more compatible with Web documents.) Some of these changes produce tables that are not compatible with earlier versions of Word; other changes affect the way you work, but not the result.

### Insert a borderless table

If you prefer borderless tables (particularly useful for page layout purposes), you can set that as the table default.

1. On the menu bar, click **Table > Insert > Table**. On the Insert Table dialog, click the **AutoFormat** button.
2. On the Table AutoFormat dialog (Figure 37), select **Table Normal** in the **Table styles** list. The preview changes to show a table with no formatting: no horizontal or vertical lines, no colors, no bold or other font changes.

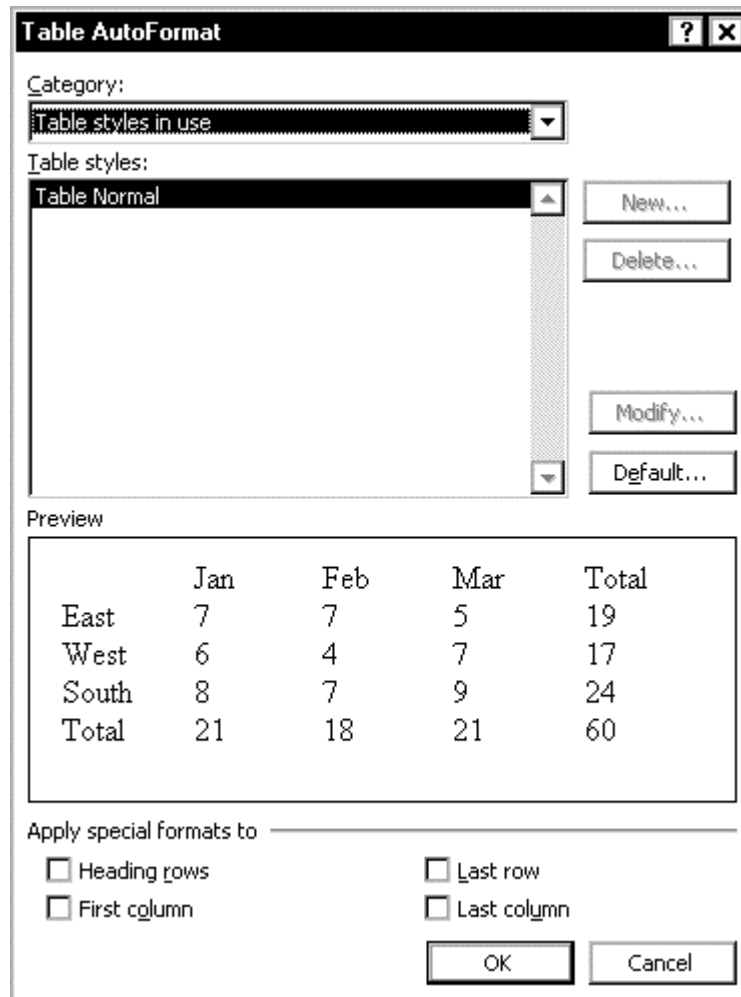


Figure 37. Setting a borderless table as the default

3. Click the **Default** button. On the Default Table Style dialog (Figure 38), choose whether you want this default to affect only the document you're working on or to be added to the Normal template. Click **OK** twice.

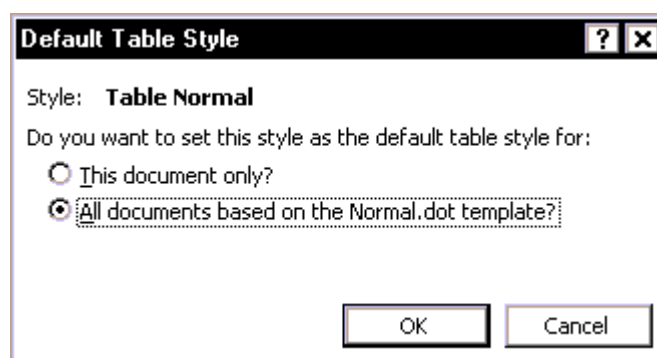


Figure 38. Confirmation of default table style

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**Tip** You can use this same technique to set any table style as the default.

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## Use AutoText for consistent table formats

If none of the table formats supplied with Word meet your needs, you can create your own. You can then store a sample table as AutoText and insert it whenever you want to insert a new table. (You can add or delete rows or columns to the sample table after you have inserted it into your document.) For more about AutoText, see “Create a new AutoText entry” on page 59.

Unfortunately, AutoText won't help you change the formatting of existing tables to a custom style. The new user-defined table styles should solve this problem, but they don't, because they don't apply paragraph styles to the text within the table.

The only way around this problem, other than manually applying paragraph styles, is to write a macro to do the job. See Chapter 8 for more about macros.

## Repeat a table heading when the table is on more than one page

When you work with a table that flows from one page to the next, you can make the table heading (if there is one) repeat on the second page, but only if the break in the table results from an automatic page break, not a manual page break.

Select the heading row or rows. The selection must include the first row of the table. On the menu bar, click **Table > Heading Rows Repeat**.

## Insert tabs, rows, and columns, and select text in a table

If you press the Tab key in a table cell, the insertion point jumps to the next cell or, if the insertion point is in the last cell of the table, a new row of cells is created.

To insert a tab into a table cell, press **CTRL+Tab**.

In Word 2002, you can choose whether to insert new rows above or below the selected row or new columns to the left or right of the selected column. Use **Table > Insert** and click one of the rows or columns choices.

The ways to select text in tables are too numerous to summarize here. One new feature in Word 2002: you can now select rows, columns, or individual cells that are not next to each other: hold down the **CTRL** key while clicking on each of them.

## Control page breaks within tables

Some of the paragraph properties used to control page breaks in ordinary text don't work quite the same in tables. Widow/Orphan Control and Keep Lines Together have no effect in a table. If you select the “Allow row to break across pages” checkbox on the Row tab of the Tables Properties dialog, the row can break anywhere, usually creating an effect that you don't want.

Keep with Next works, but only between rows. This can be quite useful to ensure that the first few rows of a table always stay together, or apply it to all the rows except the last one to keep the whole table together.

If the table is too long to fit on one page, or you want it to break at a specified row, apply the Page Break Before property to the row.

## Rotate text in a table cell

You can rotate text in a table cell 90 degrees right or left; the text rotation is visible only in Print Layout view. Text rotation is useful when you have long headings for narrow columns. When the insertion point is in a cell, you can right-click to display the shortcut menu, or click **Format > Text Direction** on the menu bar, or use the Tables and Borders toolbar. Rotated text works in Word 97 and above.

## Break up rows or cells into smaller units

Don't put several paragraphs in a single cell, especially if you need to line them up with paragraphs in an adjacent cell. This defeats the purpose of a table for alignment, can cause problems with page breaks, makes maintenance difficult, and slows down performance.

## Restore the old Cell Height and Width dialog

The Table Properties dialog has several major problems as well as some useful new functions. The problems include an inability to set a column's width reliably or to use the **F4** shortcut (Repeat last command) with the dialog, and some basic options are difficult to get to. To overcome these problems, you can restore the old Cell Height and Width dialog to your Table menu and use both it and the Table Properties dialog.

1. On the menu bar, click **Tools > Customize** and select the **Commands** tab (Figure 73).
2. Change the template shown in the **Save in:** box to the one in which you are storing your customizations. In the Categories list, click All Commands. In the Commands box, find TableFormatCell and drag it onto your Table menu.
3. The new menu command will say "Table Properties." You need to change its name, so right-click on it and type in "Cell Height and Width" or any other name.
4. Close the Customize dialog, hold down the **SHIFT** key, and click **File > Save All** to save the change.

## Change tabbed text into a table

If you have used tabs to put text into columns, and particularly if some lines have more than one tab between columns (because you used default tab stops instead of defining them explicitly), the formatting can go seriously wrong if something else is changed, for example the typeface, type size, or line length. To control the layout, you should change columns of text into tables.

To change tabbed text into a table:

1. Be sure tabs and paragraph marks are visible (see "Displaying paragraph marks, tabs, text boundaries, and other items" on page 5).
2. Remove any extra tabs; you want only one between each pair of columns. (This may temporarily make the columns not line up.) You can speed up this process by using Replace to find two tab characters and replace them with one (see "Finding and replacing text and formatting" on page 20).
3. Select all the tabbed text, including the paragraph markers.
4. On the menu bar, click **Table > Convert > Text to Table**.
5. On the Convert Text to Table dialog, select **Tabs** in the **Separate Text At** group. Click **OK** to finish.

## Avoid using some features

Although some table features work, they may have unintended consequences, in addition to slowing Word down, using more memory, and increasing the risk of table or document corruption. Here are a few features to avoid if you can.

### Automatic resize to fit contents

The **Automatic resize to fit contents** option under **Table > Table Properties > Table tab > Options** is selected by default, but it often gives undesirable results, so it is a good idea to turn it off in all tables.



### Merging cells

If you can create the same effect by removing the border between cells, do that instead of merging the cells. Don't merge cells across columns until you are sure the column widths are final, because selecting and sizing columns is complicated if any of the cells are merged.

### Nested tables

Nested tables are useful (sometimes essential) in Web pages, but are rarely useful and can be very complicated to work with in Word; use some other technique instead. If you send the document to someone who uses Word 97, nested tables will cause unpredictable results when opened in Word 97.

### Text wrapping

Text wrapping places a table in an invisible frame; the table then acts much like a graphic with text wrapping enabled. Use text-wrapped tables if you need them, but avoid them if you can.

Problems with text-wrapped tables include:

- They can span multiple pages in Word 2002, but if you send a document containing such a table to someone using Word 2000 or Word 97, the table will all be on one page; it may overlap the header and footer or part of it may be off the page completely.
- Text wrapping around tables often behaves in ways you don't want.

Be careful that you don't accidentally turn text wrapping on by clicking on the table handle (visible only in Print Layout view) and dragging the table even a tiny bit.

### User-defined table styles

A new feature in Word 2002 is the ability to define your own table styles. This sounds great until you discover that table styles don't apply paragraph styles for the text in the table cells—they apply direct formatting instead. If you're using styles (as you should in most documents of any importance), this deviation will not suit you. See Chapter 4, "Using templates and styles effectively," for more information.

## *Putting portrait headers on landscape pages*

A common problem is dealing with a document that contains mostly portrait pages, with a section of landscape pages in the middle. If the landscape material can be placed in a graphic, you can rotate the graphic and place it on a portrait page.

However, if you're dealing with text, rotating the text (within a text box, for example) may not work reliably. Here is a trick to make the headers of all the pages print on the short side of the paper (the "top" as you're looking at the sheet of paper). This is easier to do than to describe.

1. Put a section break before and after the pages to be in landscape orientation.
2. Place the insertion point anywhere in the section to be in landscape orientation. In the Page Setup dialog, on the **Margin** tab (Figure 39), select **Landscape** orientation. Make sure the **Apply to** box shows **This section**, then click **OK**.
3. On the menu bar, click **View > Header and Footer**.
4. Position the insertion point in the header. Click the **Same as Previous** button to disconnect the landscape section's header from the previous section's header. Repeat for the footer.
5. Move to the header of the portrait section after the landscape section. Click the **Same as Previous** button to disconnect the section's header from the landscape section's header. Repeat for the footer.

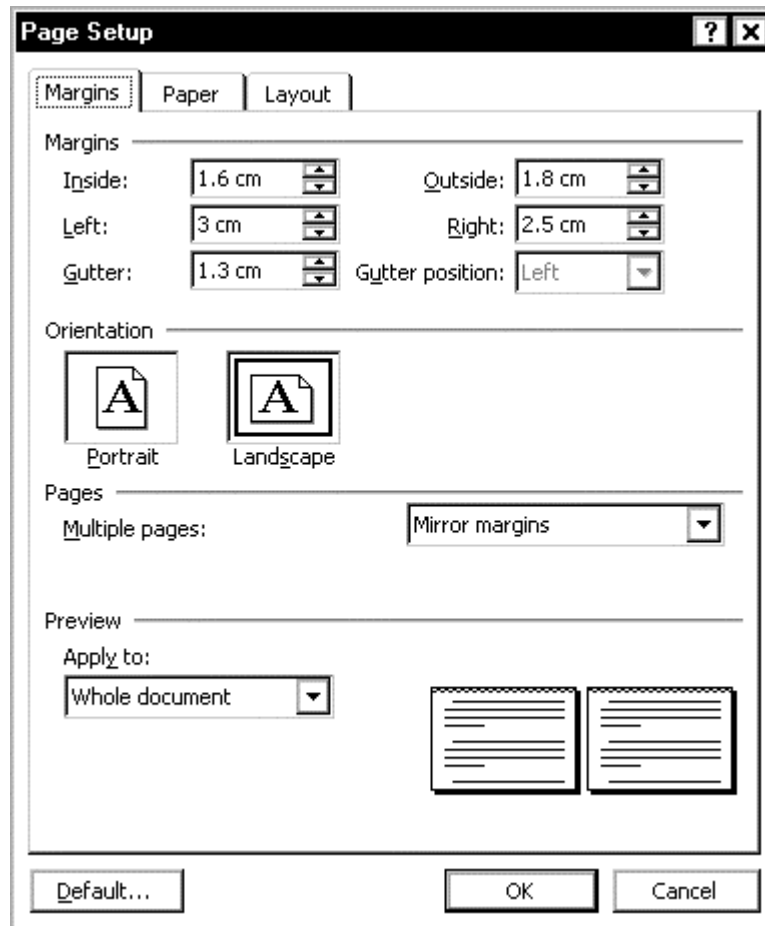


Figure 39. Selecting landscape orientation for this section

6. Position the insertion point in the header of the landscape section (along the long side of the page), as shown in Figure 40. On the menu bar, click **Insert > Text Box**. Draw a text box in the right margin area of the landscape page (along the short side of the page that you want to be the top of the page). The text box will remain selected.

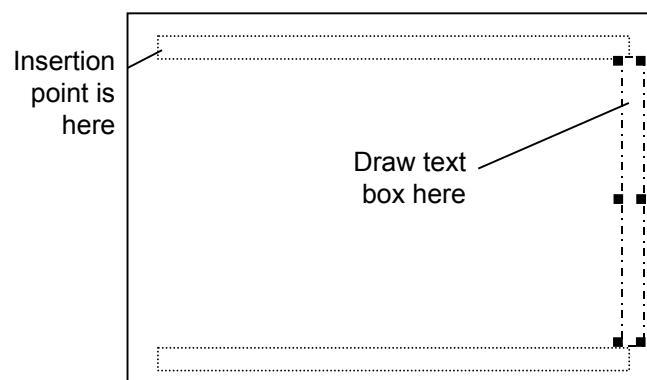


Figure 40. Drawing a text box to hold a portrait header on a landscape page

7. On the menu bar, click **Format > Text Box**. On the **Color and Lines** tab, under **Line**, change **Color** to **No Line**, and then click **OK**.

8. Click in the text box. On the Text Box toolbar, click the **Change Text Direction** button to change the text to the required direction (orientation).
9. Type or copy the required header text into the text box. To add the page number, click the **Page Number** button on the Header And Footer toolbar.
10. Make any other necessary formatting changes.
11. Repeat steps 4–9 for the footer.
12. On the Header and Footer toolbar, click **Close**. When you insert the text box while in the edit header/footer mode, Word treats it as a header/footer object and it appears on each page. No copying and pasting the text onto each page of your document.

### *Keeping a caption with a table or figure*

If you are inserting captions on tables and figures, here are two ways to keep the caption with the table or figure.

#### Define the figure or caption style to include keep with next

1. Define a style for figures, as described in “Define a new style” on page 53. If you want figure captions to appear below the figures, set the Style for the following paragraph to “Caption” on the Modify Style dialog (Figure 47). Then click **Format**, then **Paragraph**, and on the Line and Page Breaks tab, select the **Keep with next** checkbox.

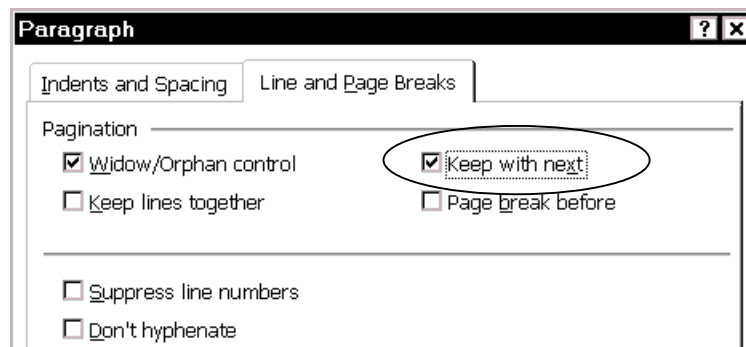


Figure 41. Keeping a figure with a following caption

2. If you want both figure and table captions to appear above the figures and tables, you can set the predefined Caption style to include Keep with next.
3. If you want table captions to appear above the tables, but figure captions to be below the figures, use the technique below for the table captions.

#### Choose keep with next for individual captions

1. Insert the table. Select the table.
2. On the menu bar, click **Insert > Reference > Caption**.
3. On the Caption dialog, choose either **Above selected item** or **Below selected item** in the **Position** box.
4. When you click **OK**, the caption appears in the specified position. Whichever paragraph is first (the caption or the picture) is now tagged Keep with next.

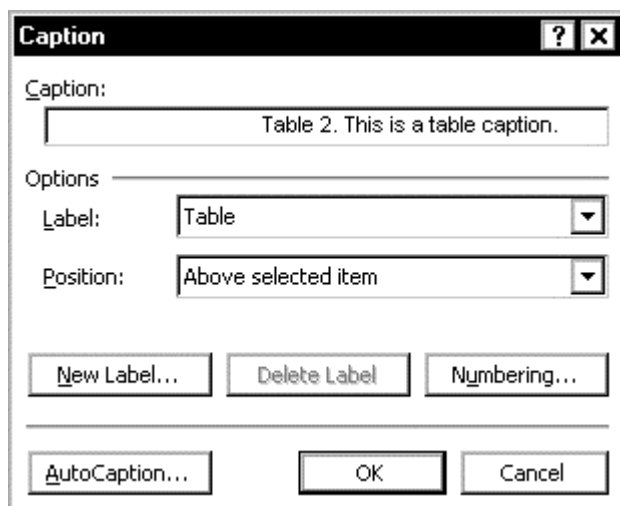


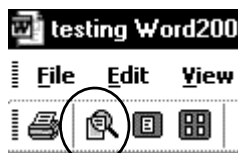
Figure 42. Inserting a table caption as “above selected item”

## Editing facing pages

When you are checking the layout of documents to be printed double-sided, you may wish to check the appearance of pages that face each other (for example, page 2 on the left and 3 on the right, then pages 4 and 5, and so on). If you use the **Zoom > Many Pages** option, Word displays page 1 on the left and 2 on the right, then pages 3 and 4, and so on—which is not what you want. If you use Print Preview, the document opens with the Magnifier button enabled, and you cannot edit the file.

To be able to edit the layout of facing pages, do this:

1. On the menu bar, click **File > Print Preview** or click the **Print Preview** button on the Standard toolbar.
2. Click the **Magnifier** button to disable it. You can now edit the file.



3. If you wish, you can display the Standard, Formatting, and other toolbars. On the menu bar, click **View > Toolbars** and select the toolbars you want.
4. To cancel Print Preview, press the **ESC** key, or click the **Close** button, or click the **Print Layout View** button, or click **View > Print Layout** on the menu bar.

## Controlling tabs

Although tables are often a better choice than tabs for lining up material, tabs can be useful in some circumstances, if you set them up and use them correctly. The rules for correct tab use are:

- Don't use the default tab stops; set the tab positions yourself.
- Don't press the **Tab** key more than once between blocks of text, except to skip a tab setting.
- Don't use spaces to line up text; choose the appropriate tab setting—right, left, center, and decimal—to line up text or numbers the way you want.

## Using templates and styles effectively

---

Every Word document is based on a **template**. Template can store styles, macros, AutoText entries, keyboard shortcuts, toolbar and menu customizations, text and graphics, and page setup information.

A **style** is a collection of formatting specifications that is given a name. Word 2002 supports **character** styles (typeface, font size, bold, italic, superscript, among others), **paragraph** styles (line spacing, space before and after, first line indent, borders and shading, plus a character style for the paragraph), **table** styles, and **list** styles. Table and list styles are new in Word 2002.

If you don't specify a template for a document, Word uses the so-called Normal template. If you don't specify a style for a paragraph in the document, Word uses the Normal paragraph style defined in the document template.

The chapter covers the basics of working with templates and styles:

### Working with templates and add-ins

- Determine what templates are attached to a document
- Find where your custom templates are stored
- Store new custom templates
- Create a new template
- Change the information in an existing template
- Copy information between templates
- Apply a different template
- Share templates with others in your workgroup

### Working with character, paragraph, table, and list styles

- Apply a style to text
- Print a style sheet
- Change a style definition
- Define a new style
- Assign styles to keyboard shortcuts
- Remove unwanted and unused styles from a document
- Remove unwanted character styles from selected text
- Find out what formatting is applied to text

There's a lot more to templates than I can cover in this chapter. If you need to work with templates at anything more than a superficial level, you'll need to study some of the many good articles available on the Web, or get someone knowledgeable to teach you—and do a lot of practicing.

## Working with templates and add-ins

Word templates can be of two types: **document templates** and **global templates** or **add-ins**. Every Word document automatically uses the so-called Normal template. You can also specify one or more other templates to be attached to a document. The first template is the document template. Any additional templates are attached as global templates or add-ins.

Don't store customizations in Normal.dot. Instead, store them in document templates or in one or more global templates. For example, you might store personal customizations of Word (such as toolbars) in one global template, project-specific or workgroup information in a second global template, and document-specific information in the document template. You might also have one or more add-in templates containing macros from third parties; for example, when you install Adobe Acrobat, it adds a template containing the PDFMaker macros, as shown in Figure 43.

You may need to delete Normal.dot occasionally, for example if your system gets infected by a Word virus. When you delete Normal.dot, Word creates a new copy, minus any customizations (and minus any viruses).

---

**Tip** Many of the tips in this chapter apply only when you have write access to the templates you are using. In many companies, only one or a few people have write access. If you're not one of them, you won't be able to do everything described in this chapter, and you may discover that the company's templates are set up to override your own customizations.

---

### Determine what templates are attached to a document

1. On the menu bar, click **Tools > Templates and Add-Ins**. The document template is shown in the **Document template** box at the top of the Templates and Add-ins dialog (Figure 43). **Global templates and add-ins** are shown in the lower box.

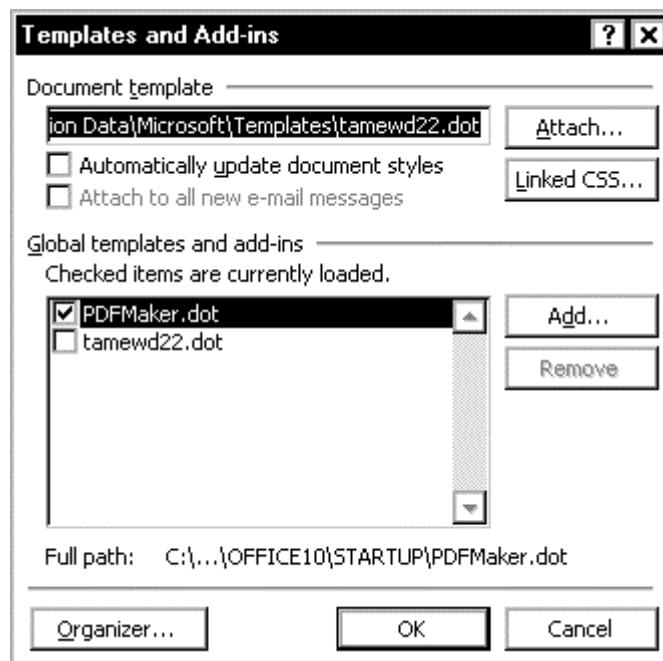


Figure 43. Determining the attached template

2. Notice the **Automatically update document styles** checkbox (under the **Document template** box). If this is checked, any changes made to the document template will apply when this document is opened again. This can be a helpful feature, or it can cause havoc.

If the attached template is used as the starting point for a range of documents, and company policy allows modification of the individual documents, then you don't want changes to the template to apply to this document unless you choose to apply them. In this case, make sure the **Automatically update document styles** checkbox is not selected.

If the attached template is used as the starting point for a series of files that are part of a larger document, or for any reason must maintain identical formatting, you may want changes to the template to apply to existing documents. In this case, make sure the **Automatically update document styles** checkbox is selected. (You should also ensure that only authorized people can make changes to the template; this might be you, or the template designer, but not necessarily every writer who can access the template.)

### Find where your custom templates are stored

Word stores custom templates in a specified folder, which is not the same folder where installed Word templates are stored. The location of the folder for custom templates varies depending on the version of Windows, whether user profiles are enabled on your machine, and whether the custom template has been designated a global template or add-in.

The easiest way to find out where your templates are stored is to click **Tools > Options** and choose the **File Locations** tab. Document templates are stored in the folders listed for User Templates and Workgroup Templates. For global templates and add-ins, look at the path listed under Startup.

To see the full path for any file location, select it and click the **Modify** button. On the menu bar of the Modify Location dialog, click **Tools > Properties**. The path is shown on the Properties dialog. Click **Cancel** twice to return to the File Locations tab.

### Store new custom templates

You can add a custom template to an existing tab on the Templates dialog, or you can create subfolders to hold templates for specific projects or for any other purpose. These subfolders will appear as new tabs on the Templates dialog.

If you want the custom template to be used as a global template or add-in that is available whenever you start Word, you must store it in the Word Startup folder.

#### To add a custom template to an existing tab on the Templates dialog

1. In Windows Explorer, go to the folder in which your custom templates are saved.
2. Create a subfolder and give it the same name as the tab in the Templates dialog.
3. Save, copy, or move your custom template into the new folder.

The template will now appear on the specified tab.

#### To add a new tab to the Templates dialog

1. In Windows Explorer, go to the folder in which your custom templates are saved.
2. Create a subfolder and give it a new name—the name you want to appear on the new tab in the Templates dialog.
3. Save, copy, or move your custom template into the new folder.

The template will now appear on the specified tab.

**Note:** The new tab does not appear in the New dialog until you save a Word document or template to the new folder.

### To store a document template in a different location

You can store a document template in the same folder as the document file, as long as you tell the document where to find the template. If the document and template are in the same folder, and you then move both of them to a different folder (on the same or a different computer), the template won't get lost; the document will find it.

This is a useful trick when you have to send a Word document to someone who does not share access to a template storage location. However, the template won't be listed in the Templates dialog, so this procedure is not recommended if you're planning to use the template to create new documents. In that case, copy the template to the document folder just before sending both document and template to someone else or moving them to a new location.

To specify the new location of a document's template:

1. On the menu bar, click **Tools > Templates and Add-Ins**. The attached template is shown in the **Document template** box at the top of the Templates and Add-Ins dialog (Figure 43).
2. Click the **Attach** button, navigate to the folder in which you've stored the template, select the template, and click **Open**. The path to the correct template is now shown in the **Document template** box.

### Create a new template

To create a new template:

1. Create a new document, open an existing document, or open an existing template.
2. From the menu bar, click **File > Save As**.
3. Set the **Save As Type** to **Document Template (\*.dot)**, browse to the place you want to store your template, and save the file there.

### Change the information in an existing template

The usual change that writers and editors make to a document template is the addition and modification of styles, described later in this chapter. You might make other changes to a document's appearance, but you are less likely to want or need to save those changes in the template.

You can change the style definitions in a template in several ways:

- Open the template in Word, make changes to the styles, then save the template.
- Make changes to styles in the document you're editing (that is based on the template), saving the changes to the template as well as in the document. Make sure you select the **Add to Template** checkbox in the Style dialog (Figure 47), that the required template is attached, and that you are authorized to change that template.
- Use the Organizer to copy the style information from one template to another.

What happens if you don't have access to the template on which the document is based, or you forget to select Add to Template? The changes don't get stored in the document template; they get stored in the document itself or in the Normal template. Then when you send the document to someone else, the changes you made might get overwritten by the settings in the document template or the Normal template on the other machine.

The intricacies of these interactions can drive you to distraction, if you're attempting to fix formatting problems but they don't stay fixed. You (or your client) may think it's a Word problem, but in fact the problem is usually one of document and template management.



## Copy information between templates

If you have styles, customizations, or other information (such as macros or AutoText) in one template that you want to use in another template, you can copy them quickly and easily using the Organizer (Figure 44).

1. On the menu bar, click **Tools > Templates and Add-ins**, then click the **Organizer** button, as shown in Figure 43.
2. In the Organizer dialog (Figure 44), use the drop-down lists in the **Styles available in** boxes to choose which template to copy from and which to copy to. You can copy from several different templates into the one you are developing.

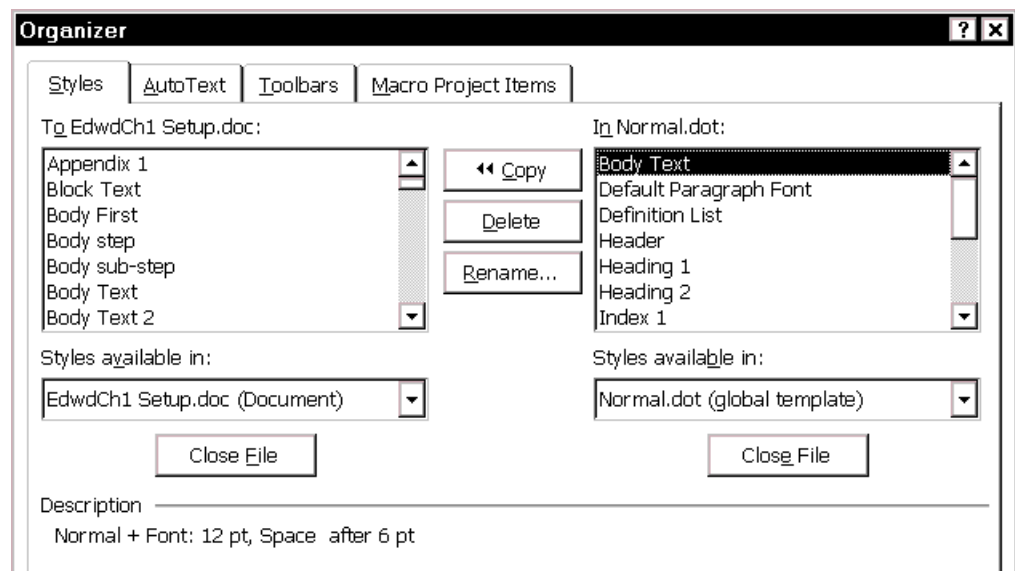


Figure 44. Use the Organizer to copy information into a new template

For example, to copy a style from the Normal template (on the right) to another template (on the left), highlight the style, then click the **Copy** button between the two columns. You can highlight and copy more than one style at a time.

3. When you have finished, click **Close**.

## Apply a different template

Applying a different document template is easy, but the effects of doing so can be confusing. The styles get updated (if you remembered to select that checkbox and if you used the same style names), but the page setup information and the contents of the headers and footers don't change—you have to do that manually.

The main problem arises when changes have been made to individual paragraphs, overriding the styles. Some of the overriding changes will persist in the document after you apply the new template; others won't. Some of those overrides you might want to keep; others you won't. So you might have to go through the entire document very carefully, looking for things that didn't do what you wanted or expected.

To avoid these problems, don't manually override styles. If you have done so, but don't need to keep the overrides, you can use some tricks to get rid of them, as described in "Remove unwanted character styles from selected text" on page 55.

To apply a different document template to an existing document:

1. On the menu bar, click **Tools > Templates and Add-Ins**.
2. In the Templates and Add-ins dialog (Figure 43), click **Attach**.
3. Select the required document template, then click **Open**.

4. Back on the Templates and Add-ins dialog, you'll now see the template file in the **Document template** box. Select the **Automatically update document styles** checkbox, then click **OK**.

### Share templates with others in your workgroup

Make sure any templates used in shared documents are available to all members of your workgroup, for example by storing them on a LAN server or the Web, and make sure that the Workgroups Templates location is listed in **Tools > Options > File Locations**.

If everyone does not have access to the same templates, some people may need to keep a copy of the templates with the document. In that case, make sure the copies are read-only, or you'll end up with a collection of slightly different templates.

### Working with character, paragraph, table, and list styles

Many people manually format paragraphs, words, tables, page layouts, and other parts of their documents, without paying any attention to templates or styles. Other people use styles, but manually change (override) the styles for some paragraphs. When several people are working on the same document, this can result in a mess. Cleaning up the mess can be time-consuming; avoiding it is a better strategy.

A *style* is a set of formats that you can apply to selected text and tables in your document to quickly change their appearance. When you apply a style, you apply a whole group of formats at the same time.

Word 2002 supports the following types of styles:


- Paragraph styles control all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders, and can include character formatting.
- Character styles affect selected text within a paragraph, such as the font and size of text, and bold and italic formats.
- Table styles (new in Word 2002) provide a consistent look to borders, shading, alignment and fonts in tables. However, the paragraph formatting in table styles does not use paragraph styles.
- List styles (new in Word 2002) apply similar alignment, numbering or bullet characters, and fonts to lists.

### Apply a style to text

Word 2002 provides several ways for you to select styles to apply. Each method can be reached from the Formatting toolbar (Figure 45). What you see from each of these ways is different. Use the method you prefer.

---

**Tip**

If the Style button  isn't on your toolbar, you can add it as described in "Add a toolbar button for a different view of the style list" on page 94.

---

Character, paragraph, table, and list styles are identified by the symbol to the right or left of each style name.

To apply an existing paragraph, table, or list style, position the insertion point in the paragraph or table and click on the name of the style in any of these lists.

To apply an existing character style, first select the characters, then click on the name of the style.

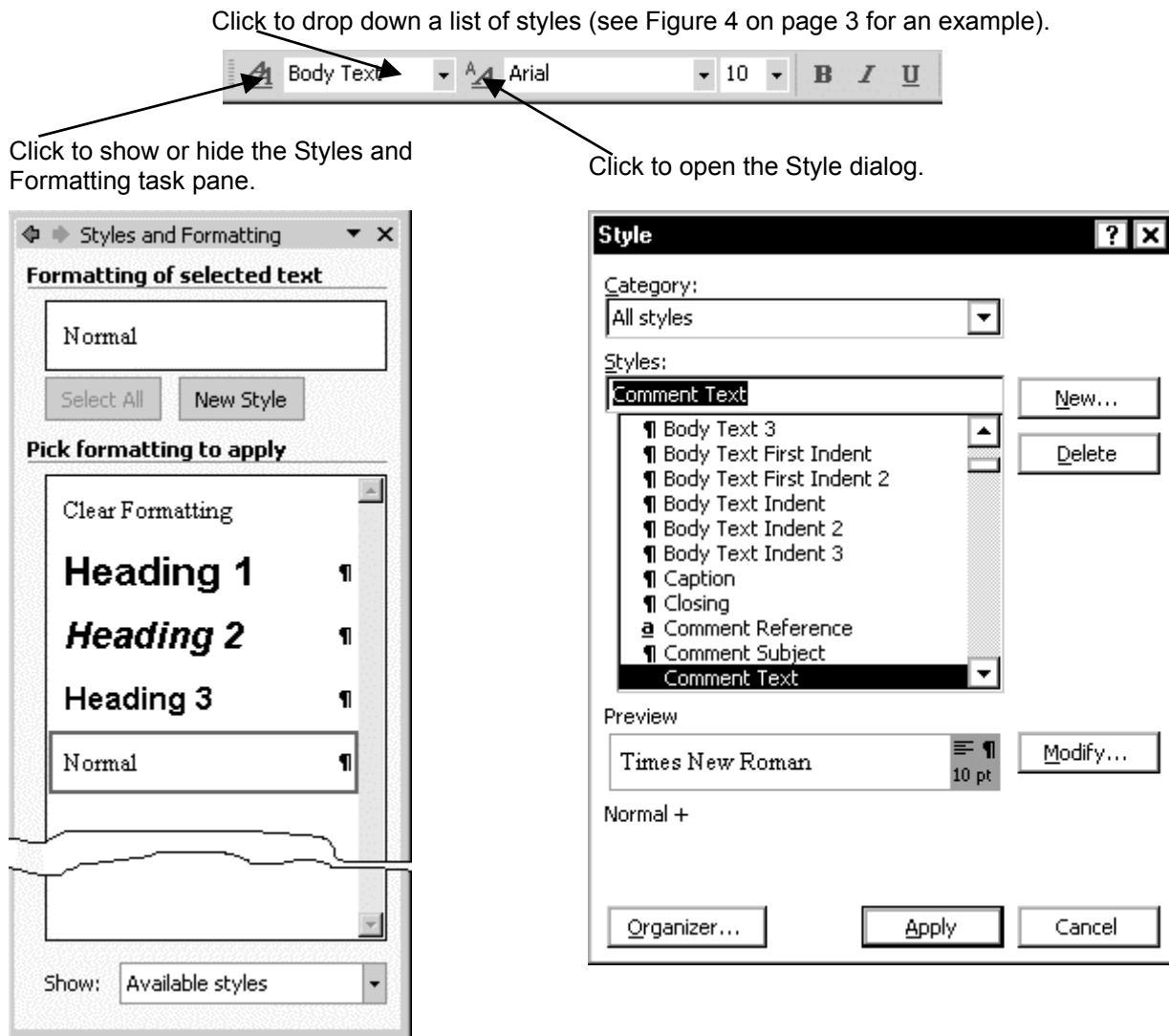


Figure 45. (Top) Part of the Formatting toolbar; (Bottom left) Styles and Formatting task pane; (Bottom right) Style dialog

## Print a style sheet

You might want to know what styles have been defined for a document, to help you decide how to modify them or which styles you can replace with other styles.

To print a list of all the styles in a document or template, and their attributes:

1. On the menu bar, click **File > Print**.
2. On the Print dialog, in the **Print what** box, choose **Styles**, then click **OK**.

## Change a style definition

Word comes with many predefined styles. You can redefine existing styles (keeping the same style name), or alter an existing style and give the altered style a new name, or create brand new styles.

One good reason to redefine the existing styles, keeping the original names, is that changing templates is easier and more effective if the same style names are used in each template.

Using the Styles and Formatting task pane, if you right-click on any style in the list, or click the arrow to the right of a highlighted style name, you get a menu from which you can choose to modify or delete the style. To apply the style, click on its name.

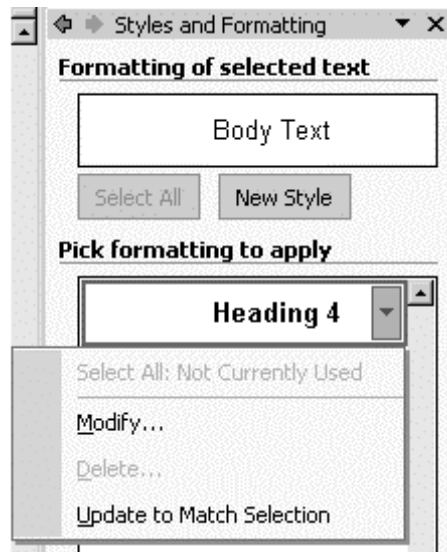


Figure 46. Style drop down menu

To redefine an existing style:

1. Choose the style you want to change (from the Style dialog or the task pane), then click **Modify**.
2. On the Modify Style dialog (Figure 47), select the **Add to template** checkbox. You can also change the style on which this style is based, and the default style for the paragraph following this one.

---

**Tip** **Style for following paragraph** applies only when you press Enter at the end of a paragraph, when the insertion point is located just before the paragraph mark.

---

3. Click **Format** and choose **Font**, **Paragraph**, or whatever is relevant.
4. Make whatever selections you need, then click **OK** to return to the Modify Style dialog.
5. If necessary, click **Format** again and choose a different attribute to define.
6. When you are done, click **OK** on the Modify Style dialog.
7. Click **Close**. You can now apply this new style as needed.

---

**Tip** If you click **Apply** instead of **Close**, the changed style is applied to the paragraph where the insertion point is located, as well as to any other paragraph tagged with that style. This effect may not be what you wanted.

---

**Notes:**

1. As discussed in “Change the information in an existing template” on page 48, if you select the **Add to template** checkbox *and* you have access to the document template, when you save your changes, they are stored in that template. If you *don't* have access to the template, the changes are stored only in the document, just as they would be if you did not select the **Add to template** checkbox.
2. You can set up hierarchies of styles, or use the existing hierarchies. For example, the built-in heading styles all take their base font from the one defined for Heading 1. If you want to change all the heading styles from one font to another, simply change the font defined for Heading 1.

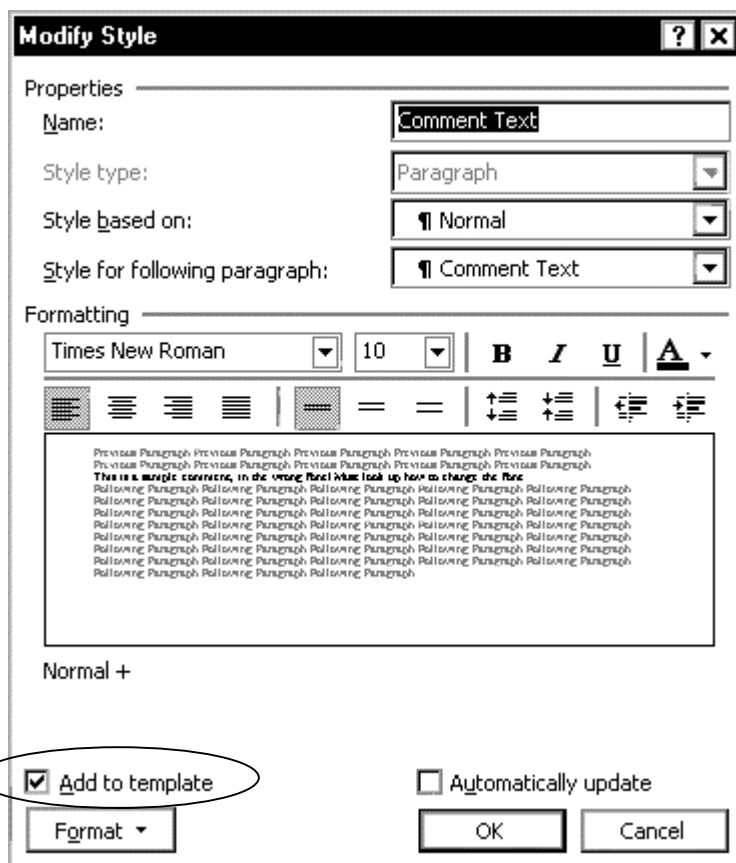


Figure 47. Changing an existing style and storing it in the template

### Define a new style

After you have defined your template and modified existing styles, you may want to add some new styles. To do this:

1. From the Style dialog or the task pane, click **New Style**.
2. In the New Style dialog (Figure 48), type a name for the new style. In the **Style type** box, select **Paragraph** or **Character**. Select the **Add to template** checkbox. Deselect the **Automatically update** checkbox.
3. Click **Format** and choose **Font**, **Paragraph**, or whatever is relevant.
4. Make whatever selections you need, then click **OK** to return to the New Style dialog.
5. If necessary, click **Format** again and choose a different attribute to define.
6. When you are done, click **OK** on the New Style dialog and return to the Style dialog.
7. Click **Close**. You can now apply this new style as needed.

---

**Tip** If you click **Apply** instead of **Close**, the new style is applied to the paragraph where the insertion point is located, as well as to any other paragraph tagged with that style. This effect may not be what you wanted.

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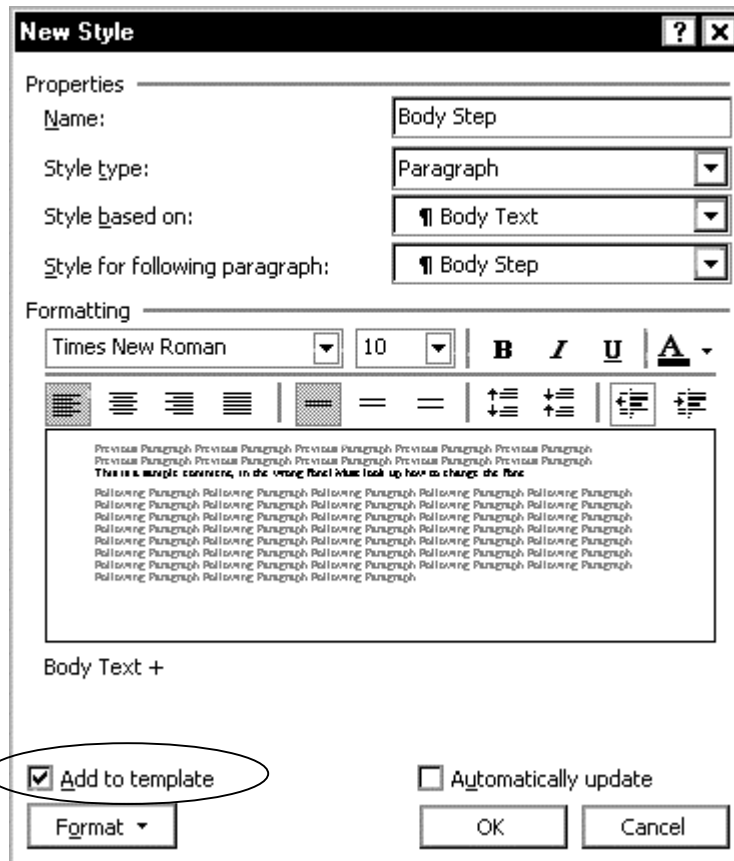


Figure 48. Adding a new style to a template

**Tip** Here's an example of the use of character styles. Let's say your company style uses bold for menu items, commands, and dialog titles. Just before you finish a book, someone decides to change the styles so dialog titles are no longer in bold. If you have defined a character style for dialog titles, you only need to change bold to not-bold in one place and then apply the change to the document.

**Note:** As discussed in "Change the information in an existing template" on page 48, if you select the **Add to template** checkbox *and* you have access to the document template, when you save your new style, it is stored in that template. If you *don't* have access to the template, the new style is stored only in the document, just as it would be if you did not select the **Add to template** checkbox. No, you don't get any warning or other indication of what's happening.

## Assign styles to keyboard shortcuts

If you prefer to use the keyboard rather than the mouse to apply styles, you can use the default keyboard shortcuts for many styles, and define your own shortcuts for other styles. Look in the online help for "Keyboard shortcuts" to find a list.

To assign other styles (including ones you've created) to keyboard shortcuts, do this:

1. On the menu bar, click **Tools > Customize**.
2. On the Customize dialog, choose the **Toolbars** tab, then click **Keyboard**.
3. On the Customize Keyboard dialog (Figure 49), scroll down in the Categories list and choose **Styles**, then highlight the style you want in the Styles list.
4. Position the cursor in the **Press new shortcut key** box, then press the key combination you want to assign to the selected style. If this key combination is already in use, you will receive an error message.

5. You can define as many keyboard shortcuts as you wish. When you are finished, click **Close**, and then click **Close** again on the Customize dialog.

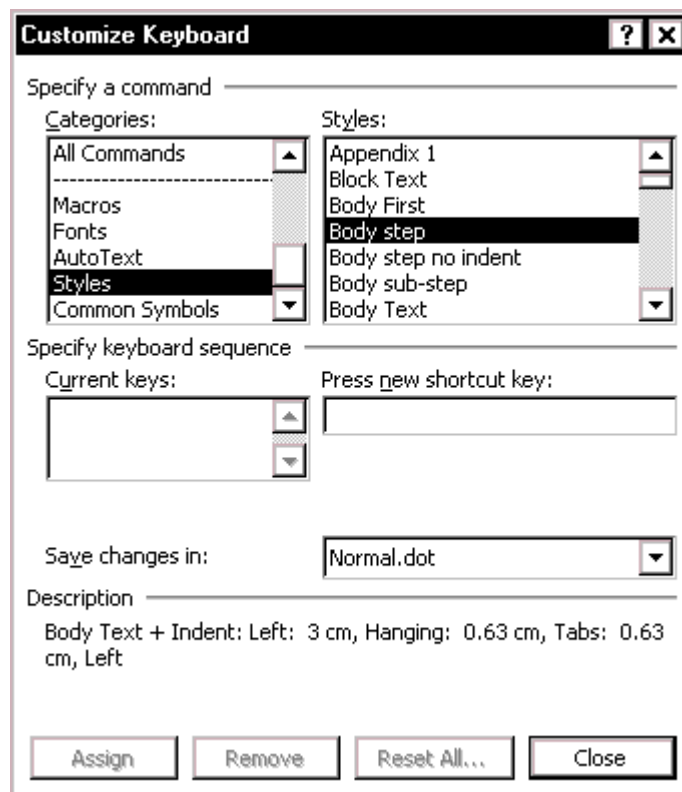


Figure 49. Assigning a style to a keyboard shortcut

## Remove unwanted and unused styles from a document

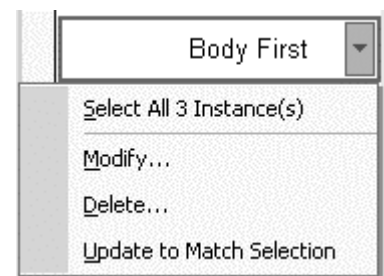
You cannot remove any of Word's predefined styles from a template, even if you are not using them.

You can remove any user-defined styles; but before you do, you should make sure the styles are not in use. If an unwanted style is in use, you'll want to replace it with a substitute style.

Replacing styles can be very useful if you are dealing with a document that has been worked on by several writers, or that has been formed by combining several documents from different sources. You want to make the styles consistent, but you don't want to spend a lot of time doing the formatting.

For example, one writer has used the style "Body Text" for all paragraphs, but another writer has used "Body First" for some paragraphs. To remove "Body First" and convert all those paragraphs to "Body Text" paragraphs:

1. Make sure **Keep track of formatting** is selected in **Tools > Options > Edit** tab.
2. Open the **Styles and Formatting** task pane, if it is not already open.
3. Point to Body First on the Styles list and click the arrow to drop down the menu shown to the right. Click **Select all # instance(s)** from the menu.



- Click on Body text in the Styles list. Word changes all instances of Body First to Body Text.

Now that the “Body first” tag is no longer in use in the document, you can safely remove it from the template.

On the Style dialog or the task pane, choose the style you want to delete, then click **Delete**. Confirm by clicking **Yes** in the pop-up box.

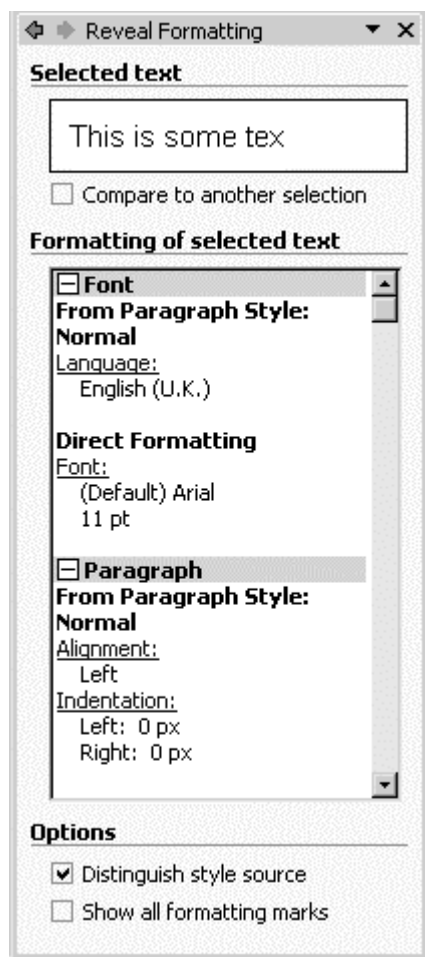
### Remove unwanted character styles from selected text

If some of your text has picked up unwanted **character** (not paragraph) styles, you can remove those styles. Select the characters, then do one of the following:

- Click **Clear Formatting** in the Styles and Formatting task pane.
- Press **CTRL+SPACEBAR**.

### Find out what formatting is applied to text

Word 2002 provides a way to quickly find out most of the formatting applied to selected text. Open the **Reveal Formatting** task pane (Figure 50).



This task pane shows information about the font, paragraph style (if any) and formatting, table formatting (if it’s a table), and section formatting (margins and other details).

The details shown vary depending on what is selected.

The example shows that direct formatting has been applied to the Normal style.

Figure 50. Reveal Formatting task pane



# Chapter 5

## Getting the most from fields

---

Fields are placeholders for data that might change in a document. This chapter describes how to use a few of them to make sure information is up to date and to avoid some of Word's numbering problems.

- Using document properties to hold information that changes
- Using AutoText fields to hold information that changes
- Fixing or avoiding list numbering problems
- Using SEQ fields to solve numbering problems
- Numbering chapters and appendixes separately
- Including the chapter number in other number sequences
- Using ListNum to solve numbering problems
- Using fields in headers and footers
- Toggling the display of fields
- Locking and unlocking fields
- Converting fields into text

Some more uses of fields are covered in Chapter 6, "Working with large or complex documents."

### *Using document properties to hold information that changes*

Word's Properties dialog contains spaces for a lot of information that you might want to include in your document. I mentioned the Summary tab in "Changing document properties" on page 30. The Custom tab (shown in Figure 51) includes many useful built-in properties, and you can add your own properties.

You may find properties, like AutoText fields, useful to hold information that might change during the course of your publishing project. For example, your company might use code names for products until just before the document is completed. Document properties have the advantage of being easier to find and change than are AutoText entries.

### Define a custom document property

To define a built-in custom document property:

1. On the menu bar, click **File > Properties** and choose the **Custom** tab.
2. Select the property from the list below the **Name** box.
3. When the property's name appears in the **Name** box, click in the **Value** box and type a value. For example, in Figure 51, the property named "Editor" has the value "Daniela" and the property named "Publisher" has the value "Wrevenge."
4. Click **Add**. The name and value of the property appear in the Properties list.

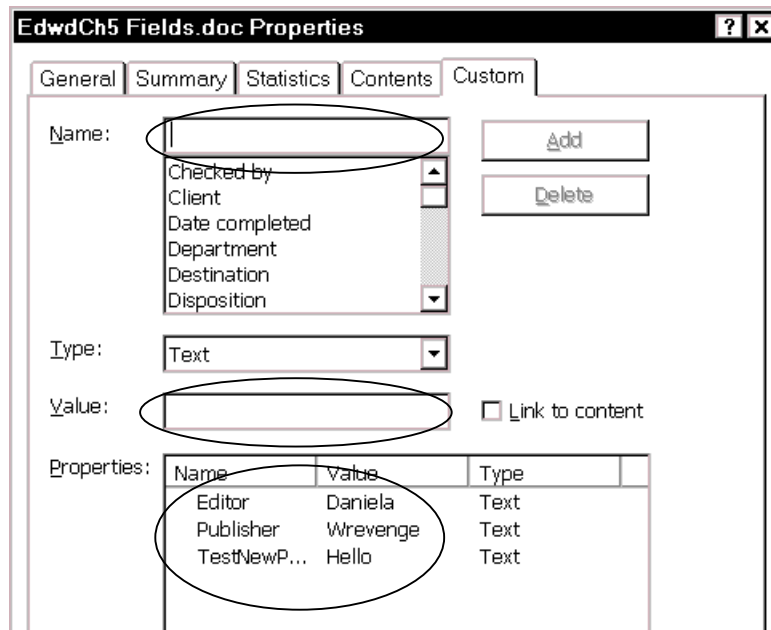


Figure 51. Defining a custom document property

To define a new custom document property:

1. Click in the **Name** box and type a new property name.
2. Click in the **Value** box and type the new property's value.
3. Click **Add**. The name and value of the new property appear in the Properties list.

To change the value of any property:

1. Click on the property in the list at the bottom of the window. The name and value appear in the boxes above.
2. Change the value of the property, then click **Modify**.

### Insert a document property field

To insert a document property field:

1. Put the insertion point where you want the field to appear. On the menu bar, click **Insert > Field**.
2. On the Field dialog (Figure 52), select **Document Information** in the Categories list, then **DocProperty** in the list of Field names.
3. In the Field Properties list, select the required property and click **OK** to insert the field in the document.

---

**Tips** If you want to see the field code, click the **Field Codes** button in the lower left-hand corner of the Field dialog.

You can also insert this field by pressing **CTRL+F9** to insert a field, then typing the field information, but you must make sure you type the property name using all the upper and lower case letters exactly as given in the document properties.

In the example given in Figure 52, the field code would look like this:

```
{ DOCPROPERTY "LastPrinted" }
```

---

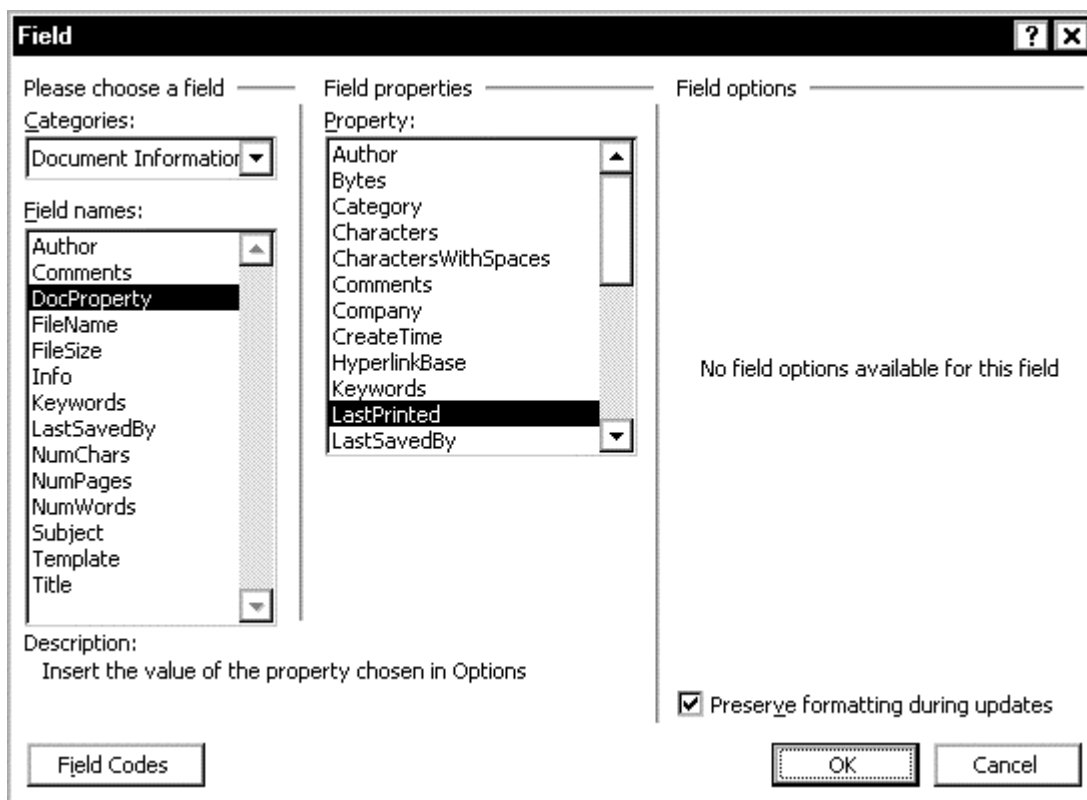


Figure 52. Choosing a document property to add to the field

## Using AutoText fields to hold information that changes

Word's AutoText and AutoCorrect features can be used for a variety of purposes.

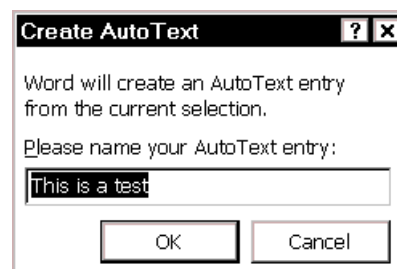
One way writers use (or should use) AutoText is to hold information that is likely to change during the course of a project. For example, the name of a manager, a product, or even your entire company may change just before the document is printed. If writers have inserted the changeable information as an AutoText field, they (or you) can change the AutoText information in one place and update all the places where that field appears.

To create an AutoText field, you must first create an AutoText *entry*, then insert the entry into an AutoText *field*. It's easy to confuse the two items.

### Create a new AutoText entry

To create a new AutoText entry:

1. Type the text you want to be in an AutoText entry.
2. Select what you typed. If it's an entire paragraph, include the paragraph mark. If it's only a phrase, but is at the end of a paragraph, make sure you do *not* select the paragraph mark.
3. On the menu bar, click **Insert > AutoText**, then click **New**.
4. The Create AutoText dialog appears. Type a name for the entry you are creating. Click **OK**.



## Insert an AutoText entry into an AutoText field

To insert an AutoText *entry* into an AutoText *field*:

1. Put the insertion point where you want the AutoText field to appear. On the menu bar, click **Insert > Field**.
2. On the Field dialog (Figure 53), select **Links and References** in the Categories list, then **AutoText** in the list of Field names.

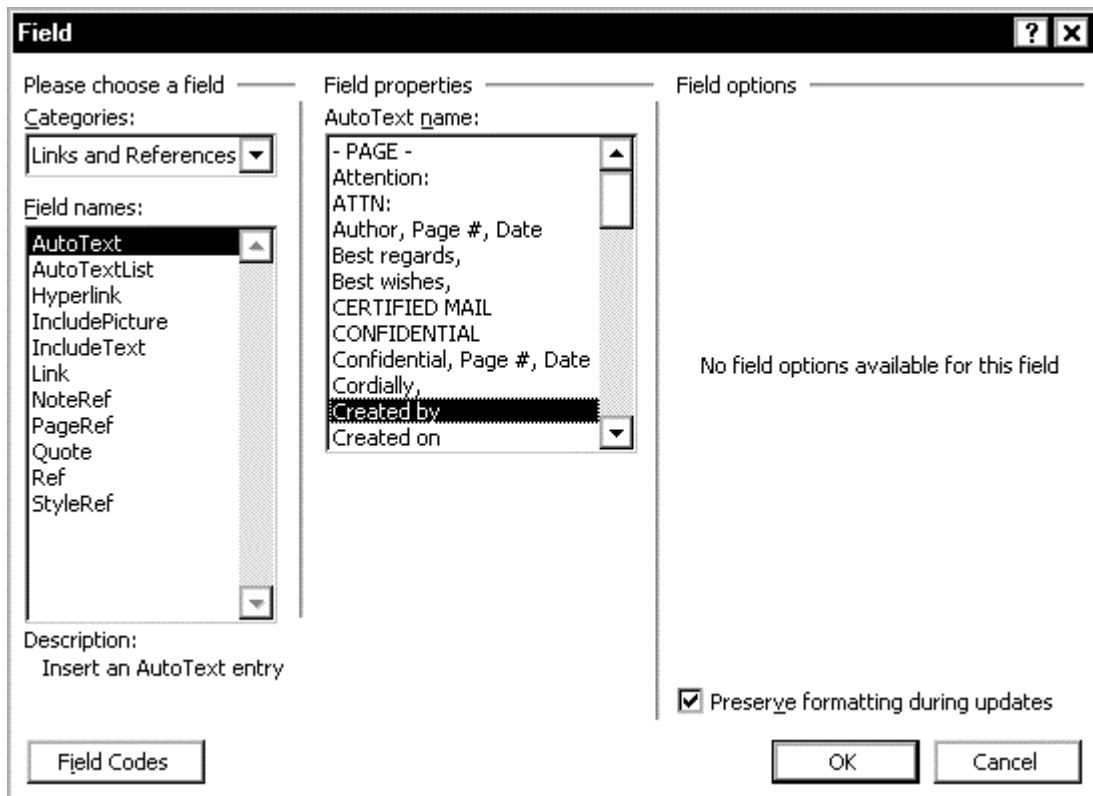


Figure 53. Selecting AutoText from the Links and References category of fields

3. In the Field Properties list, select the required entry and click **OK** to insert the field in the document.

**Tip** You can also insert this field by pressing **CTRL+F9** to insert a field, then typing the field information, but you must make sure you type the AutoText name using all the upper and lower case letters and spaces exactly as given in the list of AutoText entries.

In the example given in Figure 53, the field code would look like this:

```
{ AUTOTEXT "Created by" }
```

If you have **Field shading** set to **Always** or **When selected** on the **View** page of the Options dialog (Figure 5, reached from the **Tools** menu), you can tell that you've inserted a field instead of an ordinary AutoText entry.

All that is a bit cumbersome if you need to insert hundreds of fields into a document. You can speed up entering AutoText fields in two ways:

- Record a macro to insert the field. You'll need to record different macros for each entry. See the online help for tips on how to record a macro.
- Copy the field from one place to another in the document. This is a good way to replace words and phrases with fields, if you want to clean up a document that didn't use fields, or didn't use them consistently.

## Edit an AutoText entry

To edit an AutoText entry (for example, when a term in the document has changed):

1. Edit the text in an AutoText field in the document, or type the new words in a different place.
2. Select the edited entry. If it's an entire paragraph, include the paragraph mark. If it's only a phrase, but is at the end of a paragraph, make sure you do not select the paragraph mark.
3. On the menu bar, click **Insert > AutoText**, then click **New**.
4. In the Create AutoText dialog (**Error! Reference source not found.**), type in the box the exact original name of the entry you are editing. Click **OK**.
5. A confirmation dialog appears. ("Do you want to redefine the AutoText entry?") Click **Yes**.

**Note:** If you don't get this message, it means you haven't typed the exact name of the original entry, and you'll be creating a new one instead of overwriting the old one. Return to step 2 and try again. (And remember to delete the extraneous new entry later.)

6. When you update *fields*, the edited text will appear in all the AutoText *fields* containing the entry you just changed. To update fields, press **CTRL+A** to select the entire document, then press **F9**.

## Print AutoText entries

To print a list of the AutoText entries:

1. On the menu bar, click **File > Print**.
2. On the **Print** dialog, in the **Print what** box, choose **AutoText entries**, then click **OK**.

## Fixing or avoiding list numbering problems

Word 2002's autonumbering feature works well in some situations, but it causes major problems for many people. To avoid these problems:

1. Deselect all the list autoformatting functions on the AutoFormat and AutoFormat As You Type tabs of the AutoCorrect dialog (Figure 15).
2. For best results, and particularly if the Word document will later be converted into online help or some other program's format, use styles for numbered and bulleted list items—**don't** keep those items as ordinary paragraphs.
3. If you want more than one paragraph in any one list item (that is, a paragraph that doesn't have a number or bullet but is indented to line up with the text of the list item—like the paragraph just above this one), use a "List continue" style.
4. If some of your lists don't start at 1 when you want them to, put the insertion point in the first item of the list, then on the menu bar, click **Format > Bullets and Numbering**, select **Restart numbering**, then click **OK**.
5. Similarly, if you want a list number scheme to continue, but Word hasn't done it for you, open the Bullets and Numbering dialog (on the menu bar, click **Format > Bullets and Numbering**) and select the **Continue previous** list button.
6. For best results, don't use autonumbering at all; use LISTNUM or SEQ fields.

## Using SEQ fields to solve numbering problems

You can use Word's SEQ (sequence) fields for many purposes, for example:

- Fixing or avoiding list numbering problems
- Numbering chapters and appendixes separately
- Including the chapter number in other number sequences

### Define AutoCorrect entries to use in SEQ fields for list numbering

If you find that these steps don't solve the list numbering problems in your document (particularly if you need to bring the document into some other program, keeping list numbering intact), you'll need to use Sequence fields on your lists. These are much easier to set up and use than you might think.

First, create two new AutoCorrect entries:

1. Start a new, blank document. Press **ALT+F9** to display field codes.
2. Press **CTRL+F9** to insert a blank field, then type `SEQ Step \r 1` between the curly brackets.
3. Press **Enter** to start a new paragraph. Insert another field for `SEQ Step \n .`
4. Highlight the first field you created (the one that says `SEQ Step \r 1`). Be careful not to highlight the paragraph mark at the end of the line.
5. On the menu bar, click **Tools > AutoCorrect Options**. In the **Replace** box (see Figure 54), type `1]` (or any characters you want). Be sure that **Formatted text** is selected. Click **Add**, and then **OK**.

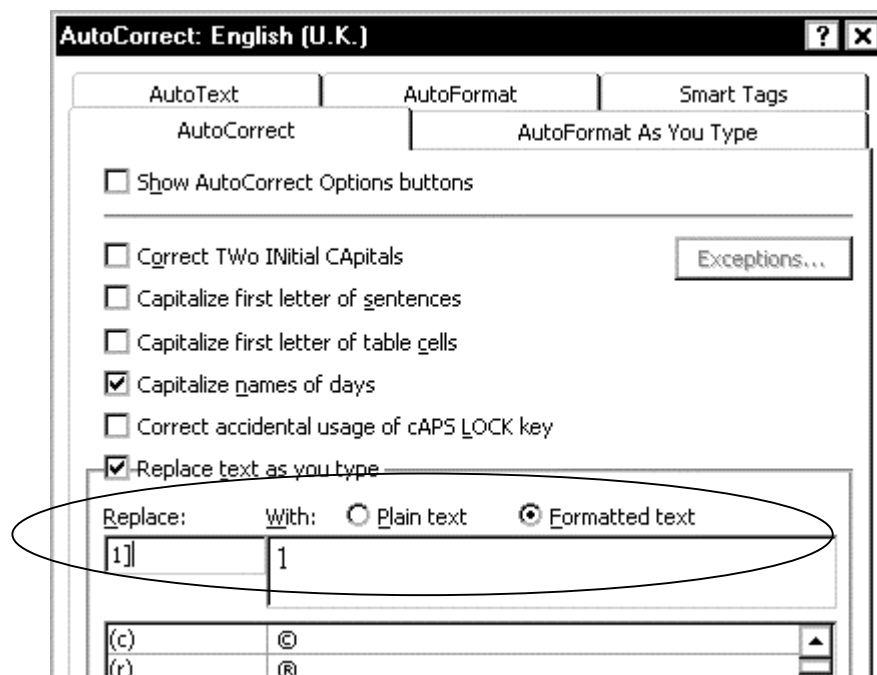


Figure 54. Defining an AutoCorrect entry

6. Highlight the second field you created (the one that says `SEQ Step \n .`). Be careful not to highlight the paragraph mark at the end of the line.
7. On the menu bar, click **Tools > AutoCorrect Options**. In the **Replace** box, type `n]` (or any characters you want). Be sure that **Formatted text** is selected. Click **Add**, and then **OK**.
8. Save the document.

## Define a new style for numbered lists

Second, define a new style for numbered lists:

1. On the **Styles and Formatting** task pane, click **New Style**.
2. On the New Style dialog (Figure 55), name the style (perhaps “Body Step” to keep it near “Body Text” in the style list), and select the new style name in the **Style for the following paragraph** list. Select the **Add to template** checkbox.

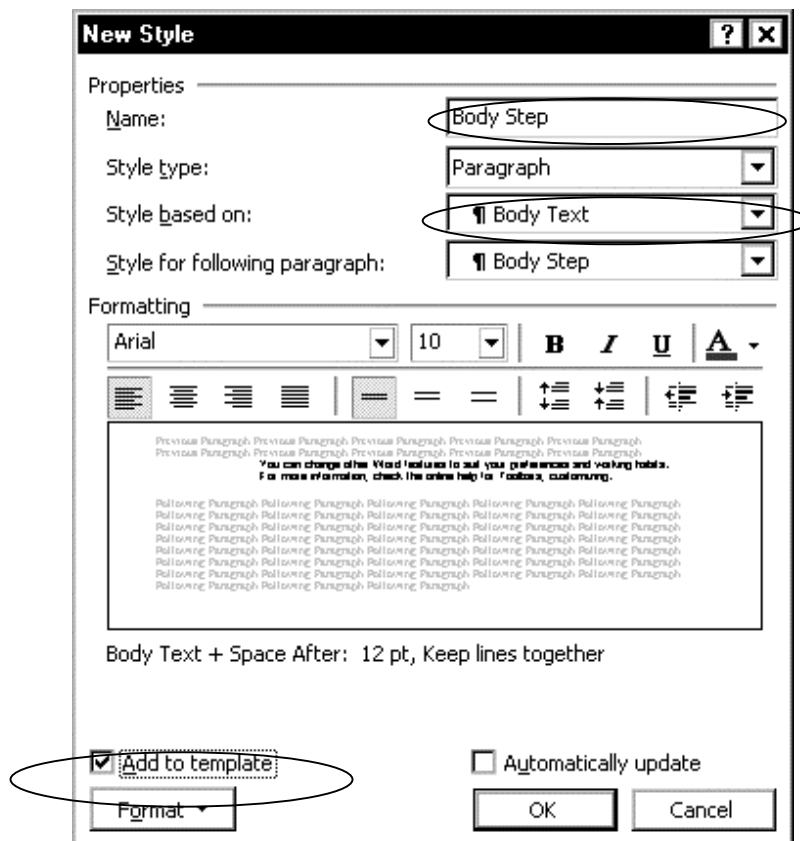


Figure 55. Defining a new style for numbered list paragraphs

3. Click **Format** and select **Paragraph**. On the Paragraph dialog (Figure 56), include a hanging indent.

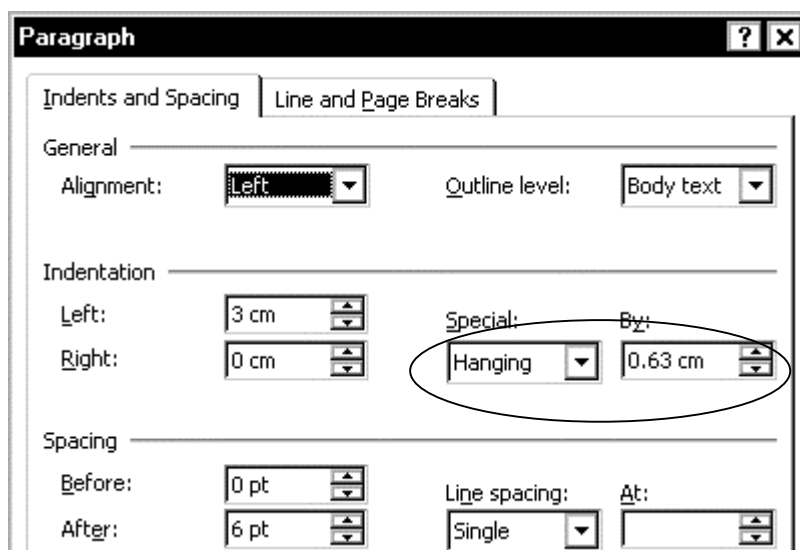


Figure 56. Including a hanging indent in a paragraph style definition

- Click the **Tabs** button and specify a left tab at the same position as the hanging indent (see Figure 57).

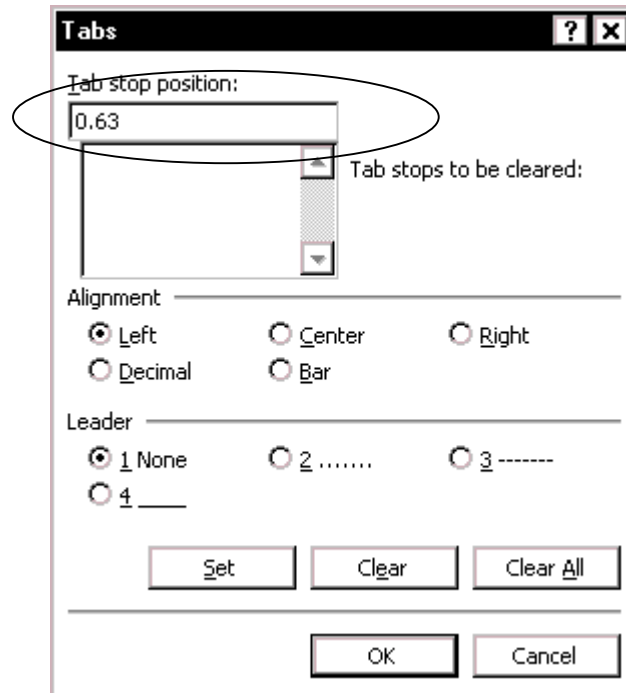


Figure 57. Defining a tab step in a paragraph style

- Click **OK** to return to the New Style dialog (Figure 55).
- Click **Format** and select **Numbering**. On the **Numbered** tab, make sure **None** is selected. Click **OK** twice.

### Use a tab to line up double- and single-digit numbers in lists

To line up double-digit numbers with single-digit numbers, you need to define the style to use two tabs. Set the first tab (for the numbers) as a **right** tab, and the second as a **left** tab. You may need to play around a bit to get the spacing the way you want, because the spacing depends on the font and size of type you are using. After you get the spacing correct, change the hanging indent to match the left tab setting, so that everything lines up properly.

### Use the AutoCorrect fields to number a list

To make it all work when writing a numbered list:

- At the point where you want a numbered list to start, press **Enter** to start a new, blank paragraph. Apply the style you just created (Body Step in this example) to this new paragraph.
- Press the **Tab** key, type **1]**, press **Tab**, then type the text of the first item in the numbered list.
- For the second and subsequent items:
  - Press **Enter** to start a new paragraph.
  - Press **Tab**, type **n]**, press **Tab**, then type the text of the next item in the numbered list.
- At the end of the list, press **Enter** to start a new paragraph, apply the usual "body text" style to the new paragraph, then continue typing.



To change an existing numbered list from Word's autonumbering to SEQ numbering:

1. If the list items already have numbers, select the list and click the number button on the toolbar to remove the numbers from the paragraphs.
2. Apply the style you created (Body Step in this example) to these paragraphs, which should now show hanging indents but no numbers.
3. Place the insertion point at the beginning of the first paragraph. Press **Tab**, type **1]**, then press **Tab**.
4. For the second and subsequent list items, move the insertion point to the start of the next paragraph, press **Tab**, type **n]**, then press **Tab** again.

**Notes:**

1. If the numbers get out of sequence (for example, because you add or delete list items, or change the order of items on the list), select the list and press **F9** to update the fields.
2. If you want nested lists (for example, sub-steps a and b under step 3), you can define other styles, with different indentations from the left margin, and other AutoCorrect items, such as **a]**, **x]** for the number sequences.

## Numbering chapters and appendixes separately

One way to number chapters and appendixes separately is to use sequence (SEQ) fields. Set up one sequence for chapters and a separate sequence for appendixes.

### Set up the chapter numbering sequence

To set up the chapter numbering sequence:

1. Place the insertion point where you want the chapter number to appear (for example, after the word "Chapter" in the chapter's title). On the menu bar, click **Insert > Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list.
3. Click the **Field Codes** button. SEQ appears in the box near the top of the dialog.
4. Type after SEQ a name for the numbering sequence, such as Chapter.

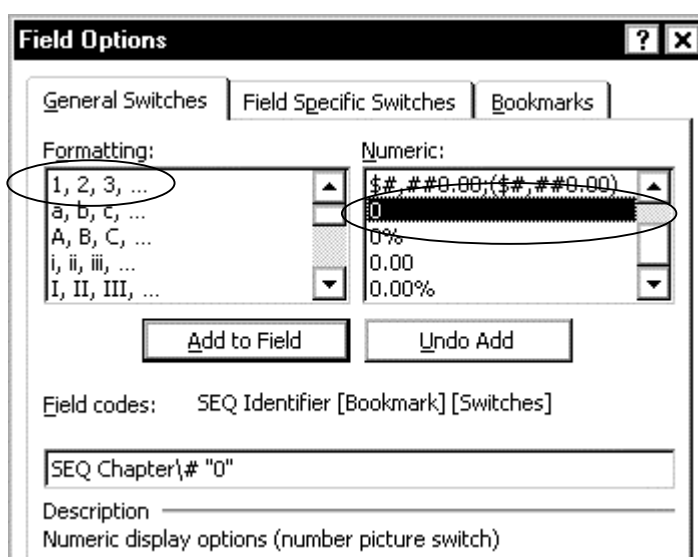


Figure 58. Specifying the display option for a chapter number sequence

- Click **Options**. On the Field Options dialog (Figure 58), choose the **General Switches** tab, select **1,2,3...** in the **Formatting** list and **0** in the **Numeric** list, then click **Add to Field**.
- Choose the **Field Specific Switches** tab (Figure 59), select **\n**, then click **Add to Field**.

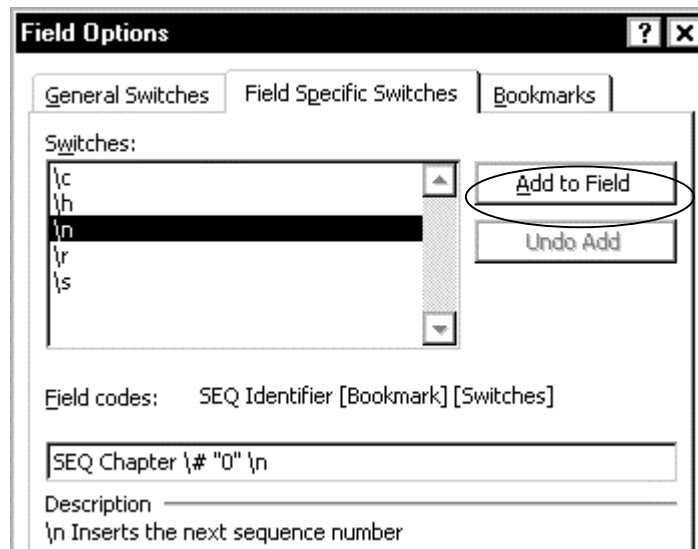


Figure 59. Specifying the \n option for a chapter numbering sequence

- Click **OK** twice to insert the field, which will display as 1.
- Insert the same field each place you want a new chapter number to appear in the file. If the chapter numbers do not display in the correct sequence, select all of the text and press **F9** to update fields.

### Set the first chapter number in each file, if necessary

If your document contains more than one file, you will need to manually set the first chapter number in each file. If you intend to use the chapter number in any other number sequence (as described in “Including the chapter number in other number sequences” on page 67), this is worth doing.

To set a chapter number, follow this procedure:

- Place the insertion point where you want the chapter number to appear (for example, after the word “Chapter” in the title). Press **CTRL+F9** to insert a field.
- Between the curly brackets, type SEQ, a name for the numbering sequence (such as Chapter), \r (not \n), and the chapter number. The fields in the different files would therefore be:

```
SEQ Chapter \r2 (for Chapter 2)
SEQ Chapter \r3 (for Chapter 3)
SEQ Chapter \r4 and so on.
```

### Set up the appendix numbering sequence

To set up the appendix numbering sequence:

- Place the insertion point where you want the first appendix number to appear (for example, after the word “Appendix” in the title). Press **CTRL+F9** to insert a field..
- Between the curly brackets, type SEQ, a name for the numbering sequence (such as Appendix), \\* ALPHABETIC, and \n. The field would be:

```
SEQ Appendix \* ALPHABETIC \
```

3. Insert the same field each place you want a new appendix number to appear in the file.

### Set the first appendix number in each file, if necessary

If the appendixes are in separate files, you need to manually set the appendix number in each file. If you intend to use the appendix number in any other number sequence (as described in “Including the chapter number in other number sequences” on page 67), this is worth doing.

To set an appendix number, follow this procedure:

1. Place the insertion point where you want the appendix number to appear (for example, after the word “Appendix” in the title). Press **CTRL+F9** to insert a field.
2. Between the curly brackets, type SEQ, a name for the numbering sequence (such as Appendix), \\* ALPHABETIC, \r (not \n), and a number corresponding to the Appendix letter. The fields in the different files would therefore be:

```
SEQ Appendix \* ALPHABETIC \r1 for Appendix A,
SEQ Appendix \* ALPHABETIC \r2 for Appendix B,
SEQ Appendix \* ALPHABETIC \r3 for Appendix C, and so on.
```

### Use a SEQ field when you don't want the number to be visible

Sometimes you may need to specify a sequence number in a file, but you want the field results (the number) to be hidden. For example, you might divide a large book into parts, and further divide the parts into chapters. You might want to put the part number in the footer so it appears in the table of contents and index along with the page number. But you don't want the part number to be visible anywhere else in the file. You can do this easily by including the \h (hidden) switch in the field code, and then . For example, { SEQ Part \r 3 \h } specifies the number to be 3, and the results to be hidden. See the next section for instructions on including this number in the footer.

### Including the chapter number in other number sequences

One reason to go to the trouble of setting up sequence fields for chapter and page numbers is to be able to easily include the chapter or appendix number in other number sequences, such as page numbers, figures numbers, and table numbers.

You might want to number your pages 1-1, 1-2, 1-3 etc in Chapter 1, 2-1, 2-2, 2-3 etc in Chapter 2, and so on. To do this:

1. On the menu bar, click **View > Header and Footer** (or double-click in the header or footer area).
2. Position the insertion point where you want the page number to appear or (if page numbers are already in the document) just before the page number field.
3. Press **CTRL+F9** to insert a blank field, then type `SEQ Chapter \c` between the curly brackets. For Appendixes, type `SEQ Appendix \* ALPHABETIC \c`
4. Type a hyphen or en-dash, then click the **Insert Page Number** button on the Header and Footer toolbar.

---

**Tip** You can also insert these fields using the Field dialog.

---

To have the chapter numbers appear in the table of contents and index along with the page numbers, you need to modify the TOC [Table of Contents] and INDEX fields. See “Creating a table of contents” on page 78 and “Creating an index” on page 81.

## Using ListNum to solve numbering problems

ListNum fields are normally used for inline numbering. For example, a sentence might include (i) an item, (ii) another item, and (iii) a third item.

You can also use ListNum fields to control numbered lists; some people find them easier to use than SEQ fields.

ListNum provides three numbering definitions, each with nine levels, as follows.

Level	Numbering list definitions		
	NumberDefault	OutlineDefault	LegalDefault
1	1)	I.	1.
2	a)	A.	1.1.
3	i)	1.	1.1.1.
4	(1)	a)	1.1.1.1.
5	(a)	(1)	1.1.1.1.1.
6	(i)	(a)	1.1.1.1.1.1.
7	1.	(i)	1.1.1.1.1.1.1.
8	a.	(a)	1.1.1.1.1.1.1.1.
9	i.	(i)	1.1.1.1.1.1.1.1.1.

The ListNum field looks like this:

```
{ LISTNUM [Name] [Switches] }
```

The switches are:

\L the level in the list, overriding the default behavior of the field

\S the start-at value for this field

**Example 1.** This code:

```
{ LISTNUM NumberDefault \L7 \S1 } First item in the list.
{ LISTNUM } Second item in the list.
{ LISTNUM } Third item in the list.
```

Produces this list:

1. First item in the list.
2. Second item in the list.
3. Third item in the list.

**Example 2.** This code:

```
{ LISTNUM NumberDefault \L7 \S1 } First item in the main list.
  { LISTNUM \L8 } First item in the sublist.
  { LISTNUM } Second item in the sublist.
{ LISTNUM \L7 } Second item in the main list.
```

Produces this list:

1. First item in the main list.
  - a. First item in the sublist.
  - b. Second item in the sublist.
2. Second item in the main list.

## Using fields in headers and footers

You can insert fields in headers and footers, to include information such as the chapter title, the date, and the author.

See “Including the chapter number in other number sequences” on page 67 for instructions on inserting a chapter number before the page number in a header or footer. (You can use the built-in Word page numbering scheme, but if you do, the chapter numbers don’t reliably carry over into a table of contents or index.)

The easiest field to insert is a cross-reference to the document’s title, a bookmark, or some other element that appear in the Cross Reference dialog (**Insert > Reference > Cross-reference**).

For more flexibility, you may wish to include a field that changes with the headings on a page. For example, you might want to include the first Heading 2 that appears on a page. You can do this using the StyleRef field:

1. Place the insertion point in the header or footer where you want the field to appear.
2. On the menu bar, click **Insert > Field**.
3. On the Field dialog (Figure 60), choose **Links and References** in the Categories list and **StyleRef** in the **Field names** list.

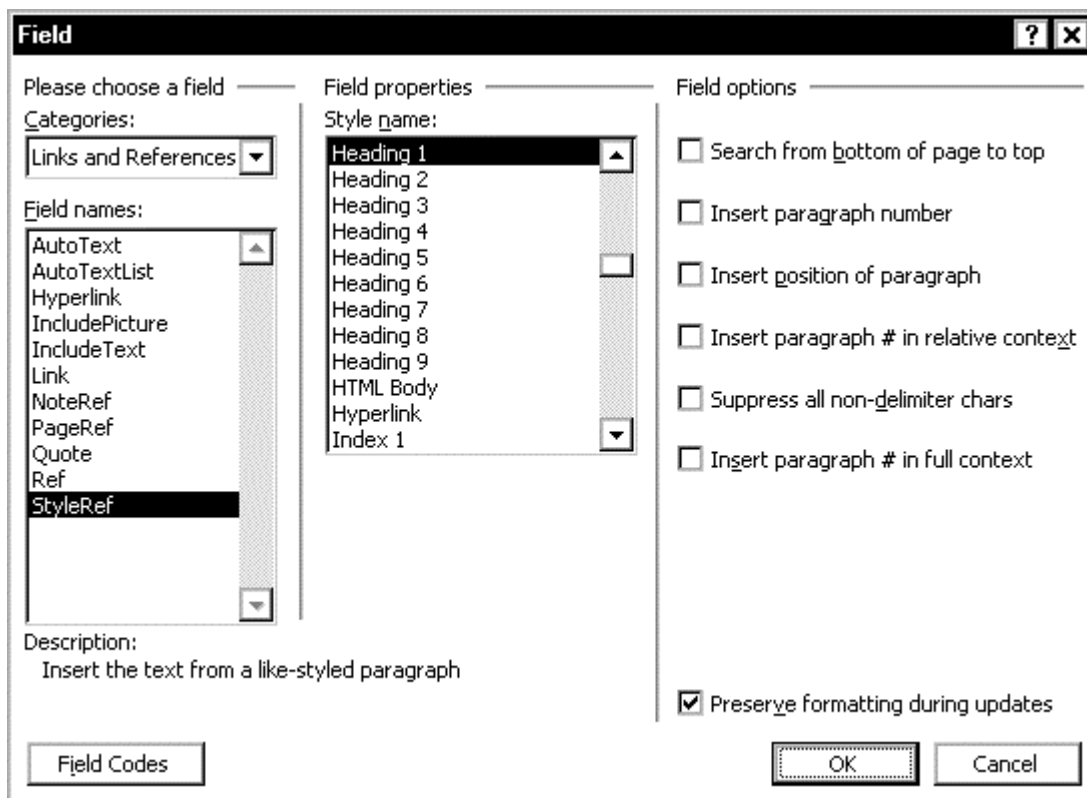


Figure 60. Using the StyleRef field

4. In the Field Properties list, select the required style name.
5. Click **OK**. The field is inserted. You can now work with this field as you would work with any other field.

---

**Tip** You can also insert this field by pressing **CTRL+F9** to insert a field, then typing the field information, but you must make sure you type the style name using all the upper and lower case letters and spaces exactly as given in the style name.

In the example shown in Figure 60, the field would look like this:

```
{ STYLEREF "Heading 1" }
```

---

## Updating fields in headers and footers

In Print Layout View, **CTRL+A** (Select All) doesn't reliably select the headers and footers, so fields may not update on screen when you press **F9**. If you switch to Normal View and back to Print Layout View, the fields should update. You could also switch to Normal View, press **CTRL+A** to select all, and press **F9** to update fields.

If you are using "Page x of y" fields in a header or footer: the y (total number of pages) may not update, or it may show the same as x on each page, or it may look right on screen but print incorrectly, or it may display wrong but print correctly. If this happens to your document, here are some suggestions for overcoming this behavior:

- Change from Print Layout view to Normal view, then back to Print Layout view. The fields in headers and footers should be automatically updated on screen.
- If printing is the problem, print pages in reverse order.
- Hide paragraph marks and other non-printing characters before updating and printing.
- Deselect **Background printing**.

## Toggling the display of fields

Here are some keyboard shortcuts to use when working with fields: Select one or more fields (or the entire document), then press the required key combination.

<b>SHIFT+F9</b>	Show or hide selected field codes
<b>ALT+F9</b>	Show or hide all field codes
<b>F9</b>	Update selected field codes

## Locking and unlocking fields

After inserting a field, you might want to make sure it does not get updated automatically, but you want to be able to update it later if necessary. To prevent updating, you need to lock the field. Select one or more fields (or the entire document), then press the required key combination.

<b>CTRL+F11</b>	Lock selected fields
<b>CTRL+SHIFT+F11</b>	Unlock selected fields

## Converting fields into text

When a document is finished, and ready to be printed or sent to layout, you may wish to turn all the fields into text, so they can't get garbled at the most inconvenient time. (Archive a copy of the file before you do this, just in case you need to return to the original and change something.)

To turn all field results into text, switch to Normal View (if you are in Print Layout View), press **CTRL+A** to select the entire document, then press **CTRL+SHIFT+F9**. (In Print Layout View, **CTRL+A** doesn't reliably select the headers and footers.)

## Working with large or complex documents

---

This chapter describes some techniques to help you use Word effectively when working with large or complex documents, for example reports or books containing multiple sections or chapters.

Many of these techniques build on the use of fields, discussed in Chapter 5.

- Strategies for working with large or complex documents
- Using section breaks to control complex documents
- Using automatic cross-references
- Using bookmarks for cross-referencing
- Cross referencing to material in another file
- Creating captions for figures and tables
- Numbering chapters and appendixes separately
- Creating a table of contents
- Editing a table of contents
- Creating an index
- Editing an index
- Creating a table of contents and an index from multiple files
- Inserting or linking to other files

### *Strategies for working with large or complex documents*

When working with large or complex documents, you have two choices: keep the entire document in one large file, or break it up into a series of smaller files. Each approach has its advantages and disadvantages. You can often combine smaller files into one large file at the end of the project and thus get the benefits of both approaches.

Avoid using Master Documents. In theory this is a great way to build large documents out of a series of smaller files, but most people cannot make it work reliably.

Some questions to consider when deciding whether to use one file or several:

- Have you had problems with Word crashing or corrupting large, complex files? Using smaller files can solve those problems.
- Do different people work on different parts of the document? Using separate files can make team writing easier, but cross-referencing between the files is more difficult.

- Do you need a table of contents or index that cover the whole document? These are easier to do if the document is in one file, but you can set up methods to compile them from multiple files.
- Will you be converting the document into another format, such as PDF? Many PDF features (such as the Toc-like “bookmarks” and clickable cross-references) can be created automatically when one Word file is converted.

### Using section breaks to control complex documents

Refer to Chapter 3, “Controlling page layout,” starting on page 31 for general instructions on the use of section breaks for these purposes:

- Changing between portrait and landscape page layouts
- Changing between single-column and multiple-column layouts
- Changing page numbering sequences (for example, from “i, ii, iii” in the front matter to “1, 2, 3” in the body of the book)
- Providing a way to have a different header and footer on the first page of each chapter

### Using automatic cross-references

If you type in references to other parts of the document, those references can easily get out-of-date if you reword a heading, add or remove figures, or reorganize sections. Replace any typed cross-references with Word’s automatic ones and, when you update fields, all the references will update automatically. (If you’re making cross-references to other files, see “Cross referencing to material in another file” on page 72.)

Ordinary cross-references within one file are easy.

1. Place the insertion point where you want the cross-reference to appear.
2. On the menu bar, click **Insert > Reference > Cross-reference**.
3. On the Cross-reference dialog (Figure 61), select the reference type (Heading is commonly used), and what you want the reference to show (for example, the heading text or the page number).

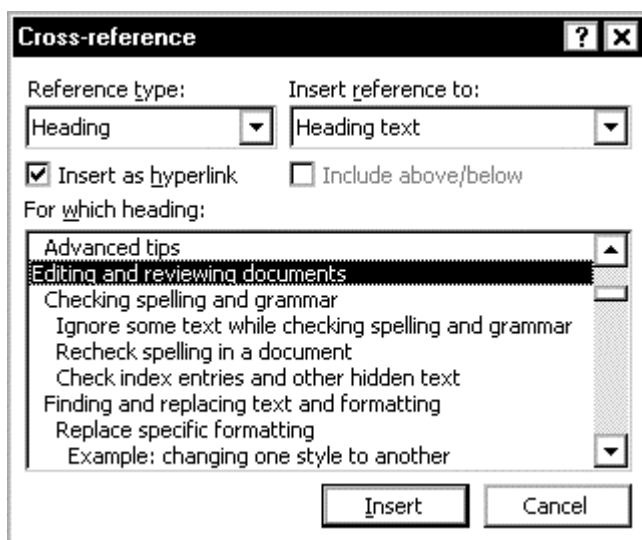


Figure 61. Selecting a heading cross-reference



Select or deselect the **Insert as hyperlink** checkbox, as you prefer; choose the heading or other item from the **For which heading** box; then click **Insert**.

The dialog stays open, so if you want to insert several cross-references, you can do so. Click outside the dialog to return to the main document. When you are finished, click **Close** (**Cancel** turns to **Close** after you have inserted a cross-reference).

### Using bookmarks for cross-referencing

Word's cross-reference dialog (Figure 61) recognizes a variety of items to which you can create references. The most versatile reference type is the bookmark.

- You can create a bookmark for anything you want.
- If you want to create a cross-reference to something in a different file, you can do so by referencing a bookmark.

To create a bookmark:

1. Highlight the text to be bookmarked.
2. On the menu bar, click **Insert > Bookmark**. On the Bookmark dialog (Figure 62), type a meaningful name for the bookmark, then click **Add**.



Figure 62. Creating a bookmark

### Prepare for cross-referencing to a page number in another file

If you intend to create a cross-reference from file A to a **page number** in file B, do this:

1. On the appropriate page in file B, press **CTRL+F9** to insert a field code **{ PAGE }**.
2. Select this field code and create a bookmark for it.
3. With the field code still selected, format it as hidden text (**Format > Font > select Hidden** checkbox).

## Cross referencing to material in another file

If you're working with a large document broken into several files, you may need to cross-reference from one file to headings, figures, page numbers, or other elements in other files. You can do this in two ways:

Method 1. Insert `includetext` fields

Method 2. Insert and edit hyperlink fields

Method 3. Use macros—see “Automating your work with macros” on page 97

**Preparation.** Before you can cross-reference from one file (A) to another (B), you need to:

- Create bookmarks in file B, as described in “Using bookmarks for cross-referencing” on page 73. Include anything you want to reference from any other file: headings, captions, page numbers.
- Store both files A and B in the same folder. This step is not strictly necessary, but it does allow you to move the files from one location to another without breaking the links.

### Method 1. Insert `includetext` fields

To create a cross-reference to another file by inserting `includetext` fields:

1. Make a list of bookmarks in file B, to use as a guide when you're inserting the cross-references in file A.
2. In file A, position the insertion point where you want a cross-reference to appear, press **CTRL+F9** to insert a blank field, then type the following field code between the curly brackets:

```
{ Includetext "B.doc" "Bookmark_name" \! \* Mergeformat }
```

where *B.doc* is the name of file B, and *Bookmark\_name* is the name of the bookmark. (If *B.doc* is in a different folder from *A.doc*, you must include the path as well as the filename.)

3. If the bookmark refers to a `{PAGE}` field (which you have previously set as hidden text in file B), select the whole field code created in Step 2, and then press **CTRL+SPACEBAR** to make the page number visible in file A.
4. Repeat for each cross-reference required.

**Note:** if you cross-referenced any `{PAGE}` fields in file B, be sure to hide hidden text and update fields in file B before updating fields in file A, to make sure that the page numbers are accurate. If you have several files all cross-referencing to each other, you may need to update each of them in turn several times before they all come out correct.

### Method 2. Insert and edit hyperlink fields

To create a cross-reference to another file by editing hyperlink fields:

1. Open file A and file B and arrange them so you can see both files. (On the menu bar, click **Window > Arrange All**.)
2. Go to the place in file A where you want to insert a cross-reference.
3. Show bookmarks in file B (**Tools > Options > View** tab > select the **Bookmarks** checkbox).

If you will be making any cross-references to page numbers, show hidden text (on the **View** tab, select the **Hidden text** checkbox).

Make sure drag-and-drop editing is enabled (**Tools > Options > Edit tab >** select the **Drag-and-drop text editing** checkbox).

4. Highlight the bookmarked text you require in file B, by clicking **Edit > Go To** on the menu bar (or pressing **CTRL+G**) and choosing the bookmark from the list.
5. Using the **right** mouse button, drag the highlighted text to the place in file A where you want the cross-reference to appear. When you release the mouse button, a pop-up menu appears. Click **Create Hyperlink Here**.
6. In file A, press **ALT+9** to display field codes. The hyperlink field will look something like this:

```
{ HYPERLINK "B.doc" \l "Bookmark_name" \s "1,15,31,4094,H2,Sample Heading" }
```

Edit this code to look something like this:

```
{ Includetext "B.doc" "Bookmark_name" \! \* Mergeformat }
```

7. You may need to change the resulting text from the style defined for hyperlinks to match the rest of the paragraph. An easy way to do this is to select the text and press **CTRL+Spacebar**.

If you have many cross-references to other files, you can speed up this process by first inserting all the hyperlinks fields and then editing them in one step.

### Creating captions for figures and tables

If you want figure captions numbered sequentially, make sure they are created using Word's caption function:

1. Select the figure. On the menu bar, click **Insert > Reference > Caption**. On the Caption dialog (Figure 63), choose **Figure** from the Label list.
2. Type the caption contents after the automatic caption label and number that appears in the **Caption** box, choose the caption position, and then click **OK**.

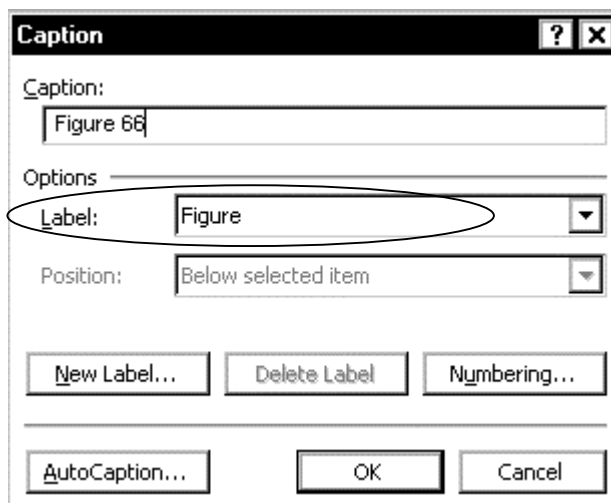


Figure 63. Using automatic figure captions

#### Notes:

1. The first figure caption in any document will be numbered 1, and each subsequent figure caption's number will be increased by 1. To start a caption with a higher number, see "Start caption numbering at 2 or more" on page 76.
2. To number tables sequentially, do the same as above, but choose **Table** in the Label box, which provides three standard sequences: Figure, Table, and Equation. You can add others. Each sequence begins with 1, and they are all numbered independently of each other.

## Start caption numbering at 2 or more

Word starts all caption sequences with 1. Sometimes you want to start numbering at 2 or more. (For example, if you have chapters in separate files, but want the figures and tables to be numbered sequentially from the beginning. If chapter 1 has figures 1, 2 and 3, then the first figure in chapter 2 should be numbered 4.)

Here's how to do it:

1. If you haven't already done so, insert the first caption into the file (on the menu bar, click **Insert > Reference > Caption**). If you've selected "Figure" as your label, the caption will read "Figure 1. blah blah."
2. Select the caption and press **SHIFT+F9** on the keyboard. The field code for the caption will appear. It will look something like this:

```
{ SEQ Figure \* ARABIC }
```

3. Place the insertion point in the field code after **SEQ Figure** and type `\r x`, where **x** is the number you want this figure to be. For this example, you would type `\r 4`. The field code will now look something like this:

```
{ SEQ Figure \r 4 \* ARABIC }
```

4. Select the caption, then press **F9** to update the field. The field now shows "Figure 4. blah blah."
5. When you insert the next caption into this file, it will automatically be numbered Figure 5. You don't have to change anything on captions after the first one.

**Note:** You can make a similar change to the field codes for Table and Equation captions, or indeed any field that produces a number sequence.

## Numbering chapters and appendixes separately

What to do if some of the headings need to be numbered (for example, Chapter 1, Chapter 2) and others at the same level need some other designation (for example, Appendix A, Appendix B)? One method uses {SEQ} fields, as described on pages 65–67. The SEQ method is best if your document is divided into multiple files, and it is useful for documents all in one file.

If your document is all in one file, and it uses Heading 1 for the chapter titles, and you don't use all of the other predefined heading levels, you can use the method described here, because the unused heading levels are available for redefinition.

- If you don't use heading numbering, you can use the same Heading 2, Heading 3, and so on for subheadings in Appendixes as well as in Chapters, so you only need one "spare" level for Appendix titles.
- If you do use heading numbering, you'll need to check how many levels of numbering you require. If your document doesn't go beyond level 4, you can use levels 5 through 8 for the equivalent Appendix heading levels.

## Set up appendix numbering

To set up Appendix numbering:

1. You need to know the exact style definition for Heading 1 style. If you've printed a list of styles, you have the information you need. Otherwise, choose **Format > Style**, and select **Heading 1**. Make a note of the information in the Description section. Note: you may need to change the list menu on the Style dialog from Styles in use to All styles before you can see the style you need in the next step.
2. Now select Heading 9 (or any other level you want to use) and click **Modify**. On the Modify Style dialog (Figure 47), choose (no style) in the **Based on** box and Body Text (or whatever style you use for ordinary paragraphs) in the **Style for following paragraph** box. Select the **Add to template** checkbox. Deselect the **Automatic update** checkbox.
3. Click **Format**, then go through the Font, Paragraph, Tabs, and (if used) Borders and Shading dialogs, specifying the same attributes as for Heading 1.
4. Now choose **Numbering** from the Format list. On the Bullets and Numbering dialog, choose the **Outline Numbered** tab (Figure 64).

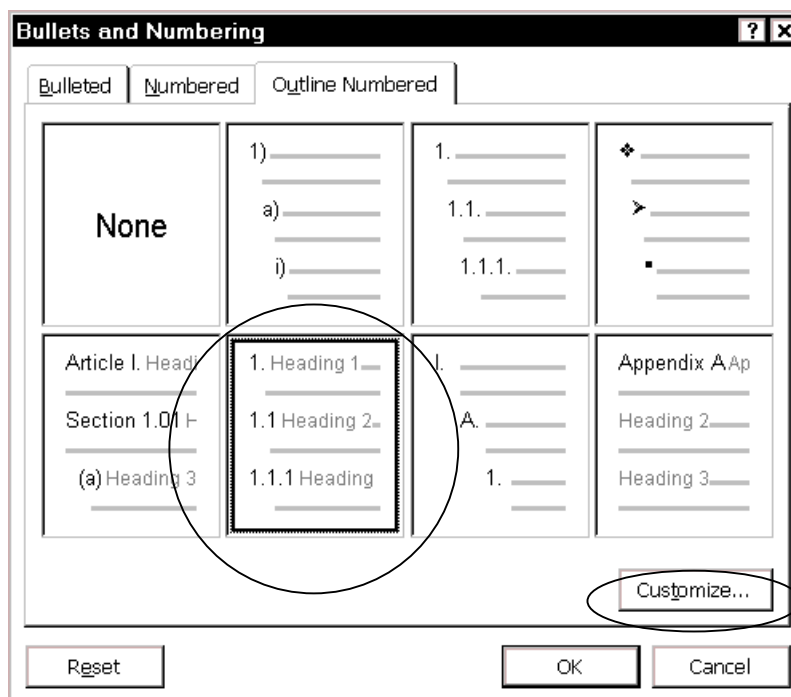


Figure 64. Selecting an outline numbering style (the choices shown on your system may be different from those shown here)

5. Choose the Chapter format if there is one, or choose any numbered style from those shown, then click **Customize**.
6. On the Customize Outline Numbered List dialog (Figure 65):
  - Type Appendix in the **Number format** box.
  - Change **Number style** to **A, B, C**.
  - When the "A" appears in the Number format box, type after it a period and a space or two (or whatever other punctuation you want to use).
  - Select **9** (or whatever Heading level you are using) in the **Level** box.
7. Click **OK** to return to the Style dialog. Click **OK** to finish.
8. You can now apply the Heading 9 style to your first-level Appendix headings.

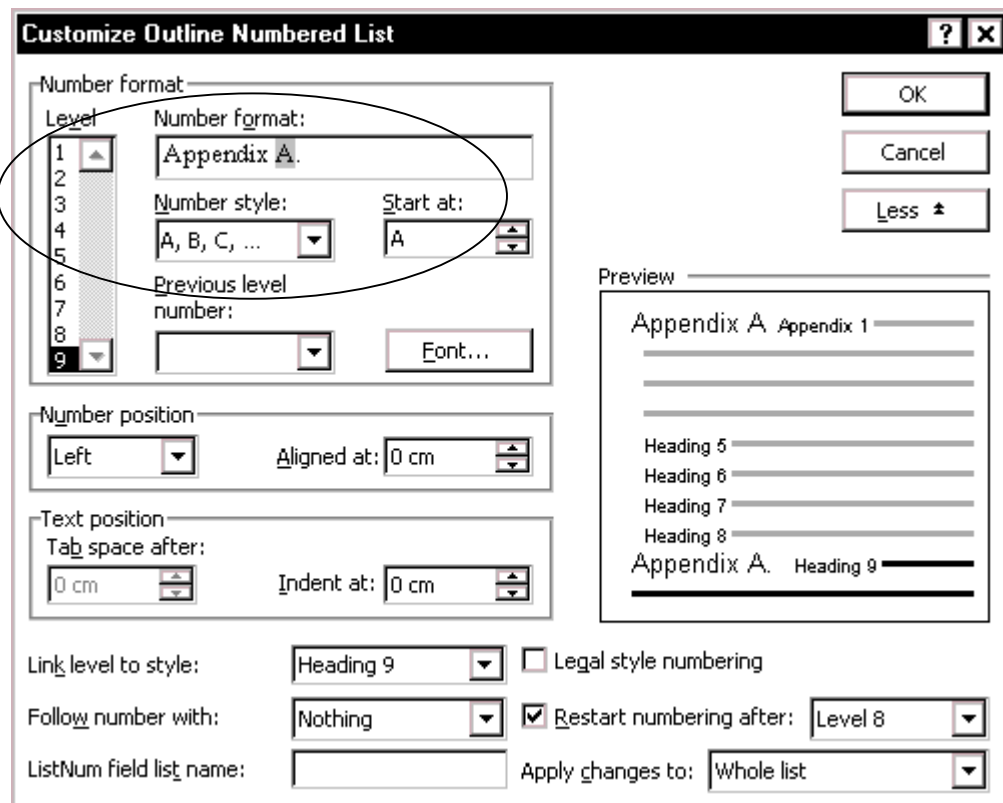


Figure 65. Changing Chapter details to Appendix details

## Creating a table of contents

Word's tables of contents are usually generated from text marked as headings (or other styles specified by the writer) in the document, although you can define and use Table of Contents Entry (TC) fields in addition to, or in place of, styles. TC fields are not covered in this book; see the online help for information.

Creating a table of contents involves these steps:

- Define the format and styles to be included
- Modify what the table of contents displays
- Generate the table of contents

See also "Creating a table of contents and an index from multiple files" on page 84.

### Define the format and styles to be included

To define the format of the table of contents:

1. Place the insertion point where you want the table of contents to appear.
2. On the menu bar, click **Insert > Reference > Index and Tables**.
3. On the Table of Contents tab of the Index and Tables dialog (Figure 66), choose one of Word's pre-defined contents-page formats, or choose From Template, which uses the TOC1, TOC2, etc. styles from the template for the document.

In the Show Levels box, choose the number of heading levels to be included in the table of contents.

4. To change which styles are included in the table of contents, click **Options**.

On the Table of Contents Options dialog (Figure 67), select the **Styles** checkbox under **Build table of contents from**.

5. As an example, we will include Heading 5, created as a first-level appendix heading in “Numbering chapters and appendixes separately” on page 76. In the list of Available styles, find Heading 5 and type a 1 in the TOC level box. (Headings 1, 2, 3 should already be specified at TOC levels 1, 2, 3.) Click **OK** to return to the Index and Tables dialog (Figure 66).

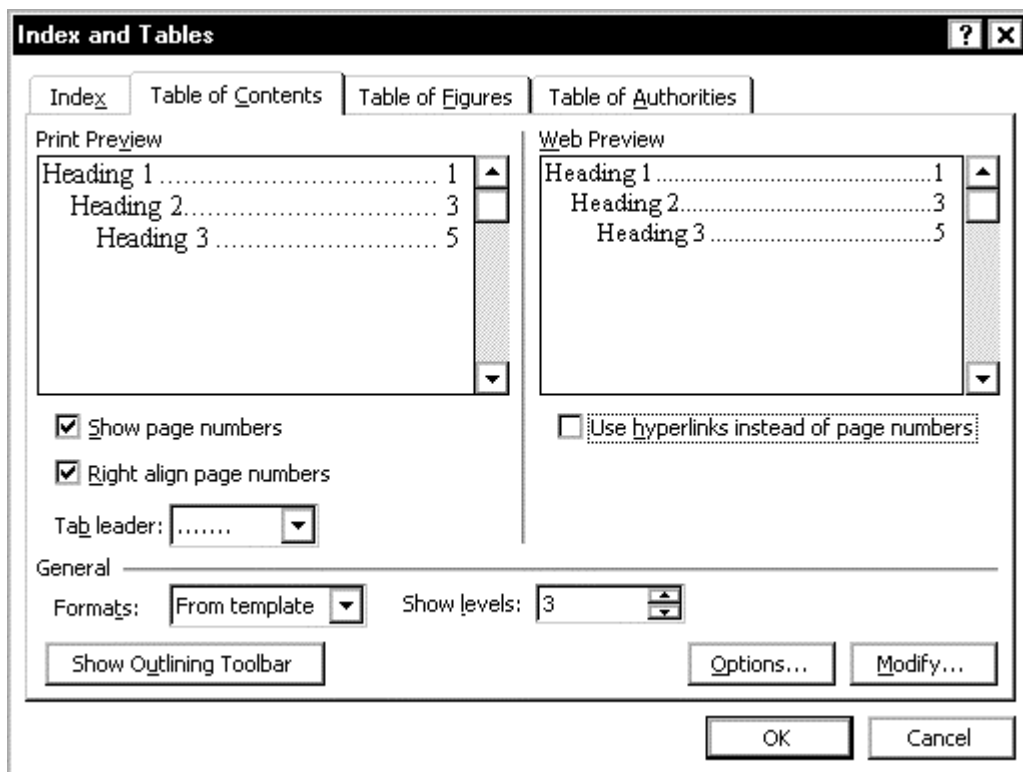


Figure 66. Defining the format of a table of contents

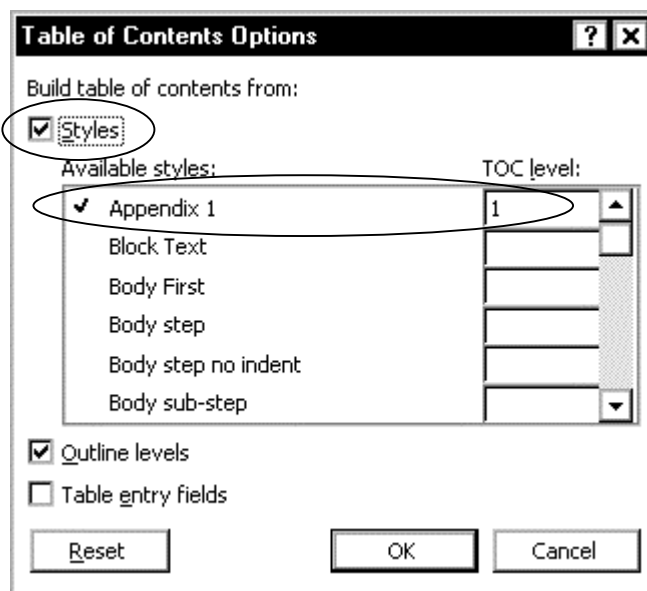


Figure 67. Specifying a style as a Table of Contents level 1 entry

Now when you generate or regenerate the Table of Contents, the appendixes will appear at the same level as the chapter headings.

## Modify what the table of contents displays

You can modify the generated TOC field. Here are some examples. Refer to the online help for more information about these switches.

To have chapter numbers appear in the table of contents along with the page numbers, you need to add the "s" switch to the TOC [Table of Contents] field. If you have used Chapter as your sequence name, your TOC field should look something like this.

```
{ TOC \o "2-3" \t "Heading 1,1" \s "Chapter" }
```

To suppress the page numbers for one heading level, add the "n" switch to the TOC field. For example, in the table of contents for this book, I have suppressed the page numbers for the chapter numbers (Heading 1). If I had not, each chapter listing would look like this:

```
Chapter 1 ..... 1
Setting up Word to work your way ..... 1
```

Here is the amended TOC field:

```
{ TOC \h \n 1-1 \z \t "Heading 1,1,Heading 2,2,Heading 3,3" }
```

Be sure to include a range of heading levels, even if you want to suppress the numbers for just one level: \n 1 does not work, but \n 1-1 does.

---

**Tip** You can also insert a TOC field by pressing **CTRL+F9**, then typing the field information between the curly brackets.

---

## Generate the table of contents

To generate a table of contents from a single file, click **OK** on the Table of Contents tab (Figure 66), or see "Creating a table of contents and an index from multiple files" on page 84.

## Editing a table of contents

To edit a table of contents in Word, you need to edit the headings, not the generated contents list. Any changes you make to a generated table of contents will be lost when it is generated again.

- If the page numbers in the existing table of contents are hyperlinks (move the pointer over a page number and see if the arrow changes to a hand), you can jump directly to the heading you want to change.
- If the page numbers are not hyperlinks, you can use Find to locate a heading, by specifying the text and choosing **Style** on the **Format** menu, then choosing the relevant heading level from the Find Style list.

## Regenerate the corrected table of contents

After you edit the headings, you'll want to regenerate and check the corrected table of contents:

1. Make sure the display of hidden text is turned off. This step is very important, if you want the page numbers in the regenerated table of contents to be correct.
2. Position the insertion point anywhere in the existing table of contents and press **F9**. (You can also select the whole file and press **F9** to update all cross-references, figure and table numbers, and the index at the same time as you regenerate the index.)
3. If you receive a message asking if you want to redate the entire ToC or just the page numbers, select "entire ToC."



## Creating an index

Word's indexes are generated from index fields that you insert into the relevant pages of the file. Creating an index involves three steps:

- Insert the index entries
- Define the format of the index
- Generate the index

See also "Creating a table of contents and an index from multiple files" on page 84.

### Insert the index entries

This is what an index entry field looks like:

```
{ XE "sample index entry" }
```

Index fields are formatted as hidden text.

To insert an index entry:

1. Highlight the word or phrase you want indexed, or position the insertion point where you want the index entry to appear.
2. Press **ALT+SHIFT+X** to open the Mark Index Entry dialog (Figure 68). A highlighted word or phrase will appear in the Main entry box.
3. Change the entry if you wish, or add a subentry, then click **Mark** to insert the index entry into the file.

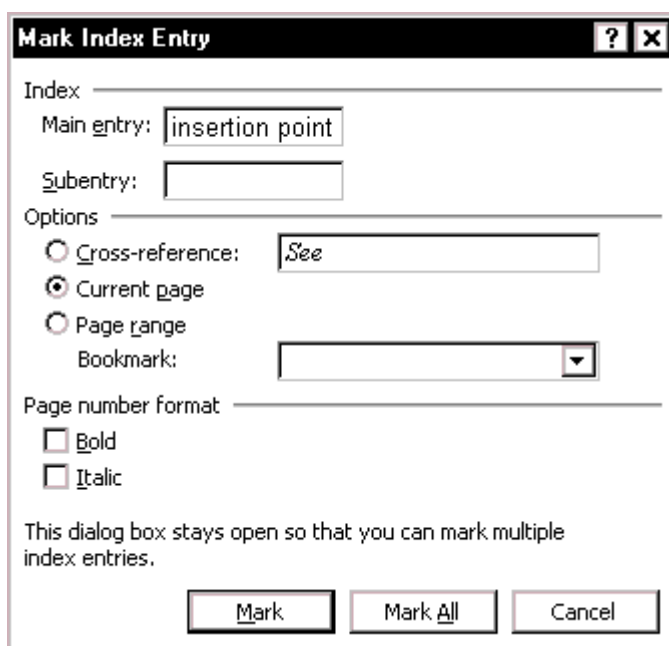


Figure 68. Creating an index entry

### Define the format of the index

To define the format of the index:

1. On the menu bar, click **Insert > Reference > Index and Tables**.
2. On the Index tab of the Index and tables dialog (Figure 69), choose one of Word's pre-defined index formats, or choose From Template, which uses the Index1, Index2, etc. styles from the template for the document.

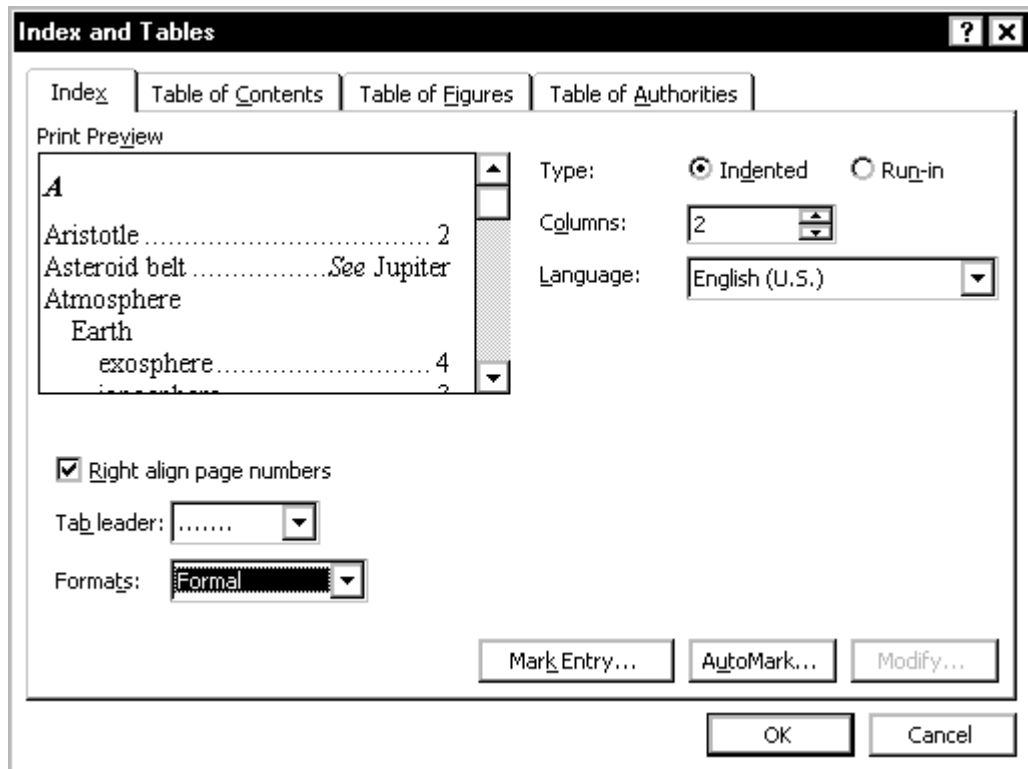


Figure 69. Defining the format of an index

To have chapter numbers appear in the index along with the page numbers, use an INDEX field something like this:

```
{ INDEX \c "2" \h "A" \s "Chapter" }
```

## Generate the index

To generate an index from a single file, click OK on the Index tab (Figure 69); or see “Creating a table of contents and an index from multiple files” on page 84.

## Include index headings (group separators) in a custom index

Group separators (called “Index Headings” in Word) are the letters that appear before the first item in an index that begins with “A,” “B,” and so on. Some index styles use group separators; others don’t. The built-in index formats found on Word’s Index and Tables dialog (Figure 69, reached from the **Insert** menu) include some formats that have group separators and some formats that don’t. Figure 69 shows one of the built-in formats that does include group separators.

If you want to define your own index format, rather than using a supplied format, you could select **From template** in the **Formats** box on this dialog, but the From template format does not include index separators. If you want to include group separators, you need to modify the index field created by this dialog—or insert an index field manually.

To modify the index field created by the Index and Tables dialog:

1. Show field codes. (**Tools > Options > View** tab, select the **Field codes** checkbox. See Figure 6.)
2. The index field code will look something like this:

```
{ INDEX \e " → " \c "2" }
```

where \e specifies the characters that separate an index entry and its page number (in this case, a tab character) and \c specifies the number of columns in the index (in this case, two).

3. Type \h "A" in the field code, so it now looks something like this:

```
{ INDEX \e " → " \h "A" \c "2" }
```

## Editing an index

To edit a Word index, you need to edit the index entries, not the generated index. Any changes you make to a generated index will be lost when the index is generated again.

I usually print and mark up the generated index, then go searching through the document looking for index entries to change. Here's a situation where the Find and Replace function comes in extremely handy. Word's index entries are formatted as hidden text, so you can specify hidden text to narrow your search.

### Edit an index entry

1. On the menu bar, click **Tools > Options > View** tab, and select the **Hidden text** checkbox. Click **OK**.
2. Press **CTRL+H** to open the Find and Replace dialog.
3. Type (or copy and paste) the index entry text into the **Find what** box.  
(If you are looking for several instances of the same index text, you might want to type the replacement entry text into the Replace with box.)
4. If necessary, click **More** to display the advanced search features.
5. Click **Format** at the bottom of the dialog, then choose **Font** from the pop-up list.
6. Uncheck all the **Effects** buttons in the Find Font dialog except for **Hidden**. Click **OK**.
7. On the Find and Replace dialog, click **Find Next**. When the entry is located, click either **Replace** (if you've put text into the **Replace with** box), **Find Next** (to skip that instance of the index entry) or **Cancel**.

You can also edit an index entry by locating it (as described above), then clicking outside the dialog and editing the entry text directly in the document. Just be careful not to delete the { **XE** " at the beginning of the entry or the " } at the end.

8. To delete the entry completely, you need to click outside the dialog, select the entire entry (including the curly brackets at the beginning and the end) and press **Delete**.
9. Repeat with new **Find what** and **Replace with** terms, until you have made all the necessary corrections.

### Regenerate and check the corrected index

1. First turn off the display of hidden text. (On the menu bar, click **Tools > Options > View** tab; or click the **Show/Hide** button on the Standard toolbar.) This step is very important, if you want the page numbers in the regenerated index to be correct.
2. Position the insertion point anywhere in the existing index and press **F9**. (You can also select the whole file and press **F9** to update all cross-references, figure and table numbers, and the table of contents at the same time as you regenerate the index.)

## Creating a table of contents and an index from multiple files

You can create a table of contents and an index from multiple files by using the RD (Referenced Document) field. This field identifies a file to include when you create a table of contents, a table of authorities, or an index for a multi-file document.

To use this technique:

1. Make sure all the documents to be included in the book have the same template applied, with the same page setup and so on.
2. If the page numbers in the book are going to be sequential throughout the book, determine the starting page number for each document and set that page number manually, as follows:
  - a. On the menu bar, click **View > Header and Footer**. Go to the first page of the document and highlight the header or footer that contains the page number.
  - b. On the menu bar, click **Insert > Page Numbers**. Click the **Format** button.
  - c. On the Page Number Format dialog (Figure 70), in the **Page numbering** section, click **Start at:** and type the page number in the box. Click **OK** to return to the Page Numbers dialog. Then click **Close** (not **OK**) on the Page Numbers dialog. Finally, click **Close** on the Header and Footer toolbar.
3. If you have other number sequences that must carry over from one file to the next (for example, chapter numbers, figure numbers, or table numbers), you'll need to set the starting number for each of those sequences in each file. For more information, see "Using SEQ fields to solve numbering problems" on page 62.

This is the main nuisance when using RD—you must manually set starting page numbers and sequence values in the individual files. But the results are reliable, so it's worth the bit of extra effort.

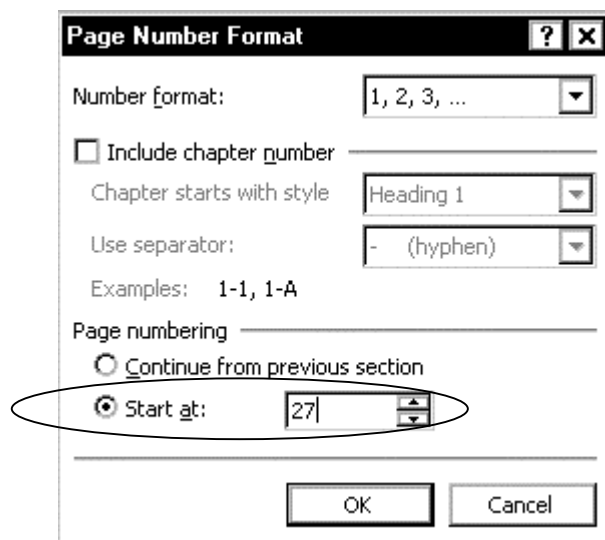


Figure 70. Specifying the starting page number for a file

4. In the file where the table of contents is to appear, show Field Codes and Hidden Text (**Tools > Options > View** tab).
5. Insert a table of contents as described in "Creating a table of contents" on page 78. You will see a { TOC } field containing whatever switches you specified.

6. Press Enter after the TOC field, to start a new paragraph.

On the menu bar, click **Insert > Field** to insert an RD field for each file in the document. Be sure to type the exact name of each file inside the quotation marks and keep the filenames in the same order as the files in the final document.:

```
{ RD "filename1.doc" } { RD "filename2.doc" }
{ RD "filename3.doc" } { RD "filename4.doc" }
```

**Notes:**

- a. Include the path with the filename if the document files are not in the same directory as the file containing the TOC field.
  - b. If the location includes a long file name with spaces, enclose it in quotation marks. Replace single backslashes with double backslashes to specify the path, for example: "C:\\My Documents\\Manual.doc". Be careful to specify the path and filename exactly.
  - c. RD fields are formatted as hidden text, so you won't see them unless you display hidden text (click **Show/Hide**).
7. To generate the table of contents, first hide Field Codes and Hidden Text (**Tools > Options > View** tab). Then select the { TOC } field and press **F9**.
  8. Similarly, in the file where the index is to appear, insert an INDEX field as described in "Creating an index" on page 81.

Press Enter after the INDEX field, to start a new paragraph.

On the menu bar, click **Insert >Field** to insert an RD field for each file in the document. Be sure to type the exact name of each file inside the quotation marks and keep the filenames in the same order as the files in the final document.:

```
{ RD "filename1.doc" } { RD "filename2.doc" }
{ RD "filename3.doc" } { RD "filename4.doc" }
```

9. To generate the index, first hide Field Codes and Hidden Text (**Tools > Options > View** tab). Then select the { INDEX } field and press **F9**.

**Note:** RD fields don't display a result in the document, so you cannot unlink an RD field (unlinking means to change field results to regular text).

## *Inserting or linking to other files*

Sometimes you'll want to insert material from another file into the one you're writing. You can do this in several ways:

- To copy all of file C into file D:
  1. Open file D and place the insertion point where you want the contents of the other file to appear.
  2. From the menu bar, click **Insert > File**, select file C from the list, and click **OK**.
- To copy all or part of file C into file D:
  1. Open both files.
  2. Copy the required material from file C, then paste it into file D.
- To make sure you always have the latest wording in file C (for example, legal information such as copyright notices, compliance statements, or licensing agreements), you need to link file C to file D, rather than copy the contents.

To do this:

1. Open file D and place the insertion point where you want the contents of the other file to appear.
  2. From the menu bar, click **Insert > File**, select file C from the list, click on the down-arrow next to the **Insert** button and select **Insert as Link**.
- To insert or link pictures, click **Insert > Picture > From File**. See “Embedding or linking graphics” on page 88 for more information.

# Chapter 7

## Working with graphics

---

Microsoft Word distinguishes between *pictures* (graphics created in another program) and *drawing objects* (graphics created using Word's drawing tools). Word treats the two types differently, but you can combine them in one illustration by using the new drawing canvas.

This chapter briefly covers a few issues related to working with graphics in Word.

- Creating graphics in another program
- Embedding or linking graphics
- Working with screen captures
- Controlling Word's drawing objects with the drawing canvas
- Wrapping text around graphics
- Editing graphics
- Cropping graphics
- Creating diagrams
- Using the drawing grid
- Working with floating or inline graphics
- Using watermarks

### *Creating graphics in another program*

You can use any software you want to create photographs, line drawings, and other graphics, as long as you can save the file as a type that Word recognizes. See "Graphics file types Word can use" in the online help for a list of these file types. Some file types require a filter that is not installed automatically when you install Word. If the required graphics filter is not on your computer, you can run the setup program again and add it.

When preparing graphics for use with Word, you need to consider several things in addition to file type. A detailed discussion of these considerations, and how to achieve the required results using your graphics software, is beyond the scope of this book, but here is a checklist:

- **Final format for the Word document.** Will it be printed or converted into a Web page, a PDF document, a help file, or some other format? If you plan to create a PDF file, is it intended to be mainly printed or viewed onscreen? Choose a graphic format that is best for the purpose.
- **Color depth.** Use the minimum number of colors that you can get away with, particularly if the final document is intended to be used online. Common color depths include 16, 256, and 16.7 million (24-bit). Lower color depths mean smaller files—often much smaller—but the resulting quality of the graphic may

not be good enough for your purposes. Experiment before you spend a lot of time creating graphics.

- **Color palette.** If you have more than one image on a page, they should all be optimized to the same color palette, or you may get strange results when the page is viewed online.
- **Compression.** Higher compression decreases file size but may degrade print or viewing quality.
- **Resizing.** Do it in your graphics program, not in Word, especially if the graphic includes any text. Make the image the exact size you want it to be in your Word document. The term in many programs is “resampling.”
- **Cropping.** Although you can crop graphics (cut off unwanted portions at the edges) in Word, cropping in graphics software reduces file size and prevents any problems if you convert the Word file to some other format.

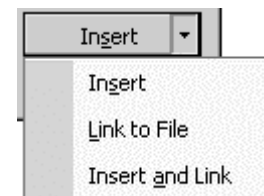
### Embedding or linking graphics

When you insert a graphic into Word, you can either embed it in the Word file or link it to the Word file, or both. Use the technique that suits your situation best.

The advantage of embedding is that the graphics won’t get lost when you send a file to someone else; they are part of the file and will travel with it. You don’t have to keep track of file locations and make sure you send all the files, and the recipient won’t have to store all the files in the correct locations so Word can find them.

The disadvantages of embedding are a much larger file size (which sometimes causes problems) and no automatic way to make sure you have the latest version of any graphics that might change. If you work in a networked group, then someone else can be working on the graphic files; if you have linked to them, then each time you open the Word document, you’ll be sure to have the most up-to-date graphics.

If you copy a graphic from another program and paste it directly into your Word document, the graphic is automatically embedded. However, if you use **Insert > Picture > From file**, you can choose whether to insert (embed) or link the picture, or both. In the Insert File dialog, click the arrow next to the **Insert** button to drop down a menu of choices.



### Working with screen captures

Technical writers frequently include screen captures (pictures of windows or dialogs) in their documents. Often, screen captures look good when you read the document on screen, but don’t print well; or they print beautifully but appear blurry on screen.

See “Controlling Word’s drawing objects with the drawing canvas” on page 89 for instructions on annotating screen captures in Word 2002.

Here are some tips for producing better screen captures, if you are not getting the results you want now.

1. Never scale (resize) a screen capture in Word. Do all resizing in a graphics program and make the picture the exact size you want it to be in Word.
2. Screen captures are bitmaps. Save screen shots as .BMP, .GIF, or .TIFF files. Never save a screen shot as a .JPG file; use .JPG for photographs only.
3. Capture the screen in full color (16 million) and use your graphics package to reduce the color depth to 256 colors. Most screen shots don’t have many colors in them anyway.



4. If you don't need color, or if your document is going to be photocopied or printed on a low-resolution printer (for example, if it is distributed as a PDF to be printed on desktop printers), consider changing your display to High Resolution White before capturing screens, and then saving the graphics as 256 colors. Most of the screen captures in this book were done that way.
5. Optimize the color palette for the entire set of pictures for the document. This ensures that the colors used in one picture are the same as the colors used in all the other pictures. You may have to experiment a bit to find the best color palette.

### Controlling Word's drawing objects with the drawing canvas

Callouts, text boxes, and other AutoShapes are some of Word's drawing objects, which you can use to create drawings and annotate graphics imported from another program.

Drawing objects do not behave the same as embedded or linked graphics such as photographs or screen captures. However, in Word 2002 you can use the new drawing canvas to group a collection of drawing objects (with or without a graphic such as a screen capture) into an object that then behaves like any other graphic.

To create a graphic composed of a screen capture with callouts:

1. Click in your document where you want the new drawing to appear.
2. On the menu bar, click **Insert > Picture > New Drawing**. A drawing canvas is placed into your document.
3. Make sure the drawing canvas is selected. On the menu bar, click **Insert > Picture > From file**. Find the screen capture (graphic file) you want to use, and click **Insert**.
4. With the drawing canvas still selected, add any Word drawing objects required, for example callouts and arrows.

For example, on the **Drawing** toolbar, click **AutoShapes**, point to **Callouts**, and choose an appropriate style. The pointer changes to a cross (+). Click and drag where you want the callout to appear (you can move it later, if necessary). Type whatever you want.

Select the callout, right-click on the edge of it, and select **Format AutoShape** from the shortcut menu. Format the callout as required, using the drawing tools.

---

**Tip** If you're creating a lot of callouts, save the format as the AutoShape default. Select the callout, then click the small arrow by **Draw** on the drawing toolbar. Select **Set AutoShape Defaults** from the popup menu.

---

5. On the Drawing Canvas toolbar, click the **Fit** button.



6. Select all of the objects on the drawing canvas (hold down the **SHIFT** key while clicking on each in turn). Right-click within the group of objects and select **Grouping**, then **Group**, from the pop-up menu, as shown in Figure 71.

All of the components of the drawing are now grouped into one drawing, so you can copy or move it without losing any of the pieces.

You can format this drawing in the same way you format any other graphic, but you can also ungroup the objects, edit the individual AutoShapes or other objects that make up the graphic, and regroup the shapes.

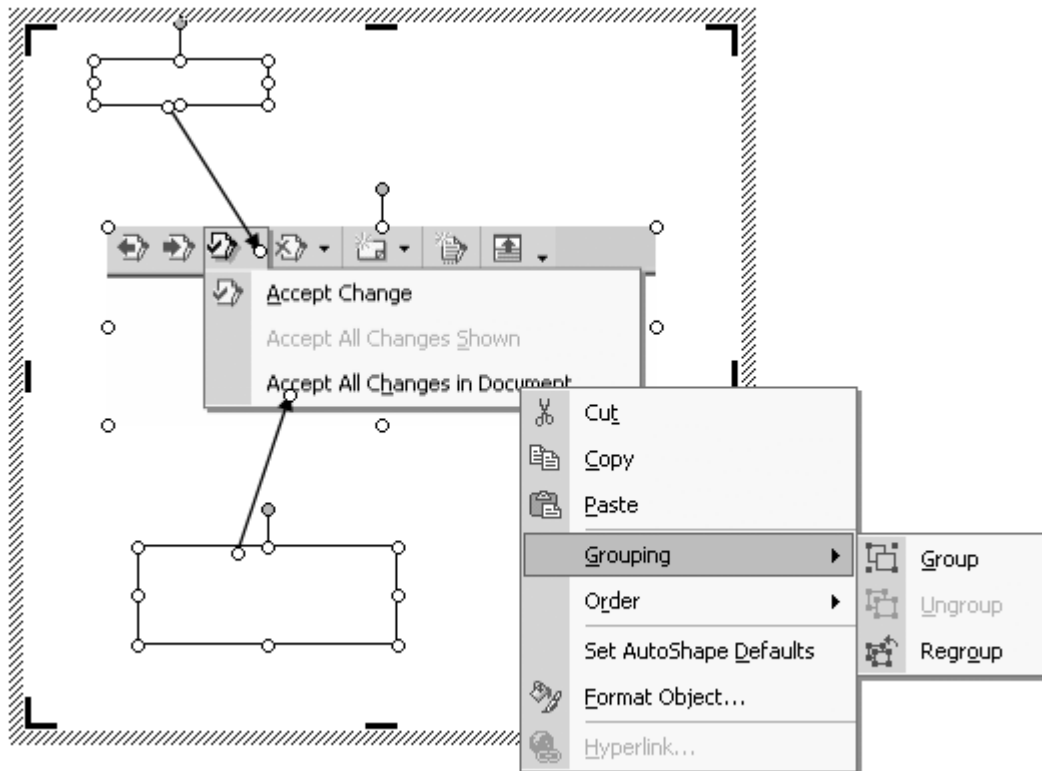


Figure 71. Using the drawing canvas to group callouts with a screen capture

## Wrapping text around graphics

Word's text wrapping features can be useful for many purposes, for example when creating brochures and newsletters. To wrap text around a graphic (picture):

1. Click on the graphic. On the menu bar, click **Format > Picture** or **Format > Object**. (Or right-click on the picture and choose **Format Picture** or **Format Object** from the shortcut menu.)

**Note:** Depending on how the picture was created, saved, or inserted, the choices may read **Picture** or **Object**, but the effect is the same.

2. On the Format Picture (or Format Object) dialog, choose the **Layout** tab (Figure 72), where you can choose the wrapping style required. To display more positioning choices, click the **Advanced** button .

## Editing graphics

If you produced a graphic using Word's Drawing tools, you can edit it directly in Word. To edit other graphics, you need to use the software that produced them, or you may be able to use equivalent software; for example, bitmaps, gifs, and jpegs can be edited using a variety of image-editing software. Consult the documentation for your graphics software.

You cannot easily extract embedded graphics from Word so you can edit them. Instead, you need to edit the original graphic file and re-embed it. If you have linked the graphics instead of embedding them, this process is easy.

If you don't have the original graphics files, you can save the Word file as HTML. When you do that, Word creates GIF or JPG files of all the graphics. Unfortunately, you cannot choose which format Word uses, and the resulting files may not be of high enough quality for your purposes.

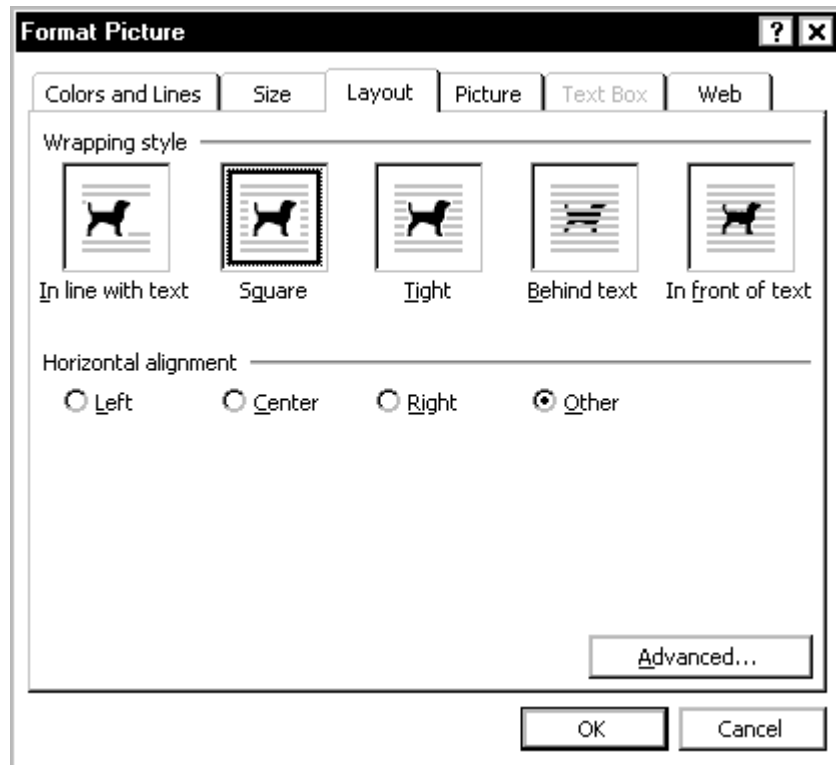


Figure 72. Basic choices for wrapping text around pictures in Word

### Cropping graphics

When possible, crop graphics (cut off unwanted portions at the edges) in your graphics software, not in Word.

If you do need to crop a graphic in Word 2002, here's how:

1. Select the graphic.
2. Display the **Picture** toolbar, if it is not visible.
3. Click the **Crop** tool (which looks like two X's). The mouse pointer turns into an arrow with a similar two-X shape at its tip.
4. Position the pointer over one of the handles on the edge of the picture, hold down the left mouse button, and drag the handle into the picture.

When you release the mouse button, part of the picture is cut off, but the picture is not resized (as would happen if you dragged a handle without clicking the Crop button first).

You can specify exact measurements for cropping a graphic by clicking **Picture** on the **Format** menu or the Picture toolbar, and then selecting the amount of cropping you want in the **Crop From** boxes.

---

**Tip** Cropping in Word does not make the file size any smaller, because it does not remove any part of the picture; the cropped portions are hidden.

---

## Creating diagrams

The Drawing toolbar now includes tools to create a variety of diagrams, including Cycle, Target, Radial, Venn, and Pyramid; and shapes, lines, and connectors to quickly draw flowcharts and organization charts. For details, consult the online help.

## Using the drawing grid

The drawing grid is an invisible network of lines that helps you align drawing objects. As you drag or draw an object or an AutoShape, Word “snaps” it into alignment with the nearest intersection of gridlines. You can display the gridlines and change the vertical and horizontal spacing between gridlines.

To change settings for the drawing grid, open the Drawing toolbar, click the arrow next to **Draw**, and then click **Grid**.

## Working with floating or inline graphics

In Word, graphics can be either *floating* or *inline*.

Use floating graphics when you need to wrap text around the graphic or have the graphic appear in front of text or behind text, or when you want to anchor a graphic to a specific place on the page. Floating graphics can sometimes wander away from where you put them, so use them only when you can find no other solution to a layout problem. For example, tables will solve many layout problems.

Use inline graphics when you want the graphic to remain in its relationship to the text rather than the page.

In Word 2002, you can change the default behavior of graphics by using **Tools > Options > Edit** and choosing a setting for **Insert/Paste Pictures As** (see Figure 7 on page 6). This setting affects **Edit > Paste**, **Edit > Paste Special**, and **Insert > Picture**. However, when you paste a floating graphic, it always pastes floating, regardless of this setting.

## Using watermarks

Watermarks are text or pictures that appear behind document text. One common use is to mark a document as a draft. To add a watermark to your document:

1. On the menu bar, click **Format > Background > Printed Watermark**.
2. To insert a picture as a watermark, select **Picture Watermark**, and then click **Select Picture**. Select the picture you want, and then click **Insert**.

To insert a text watermark, select **Text Watermark**, and then select or type the text that you want to appear as the watermark.

3. Select any additional options that you want (such as “washout” for pictures or “semitransparent” for text, and then click **Apply**.

---

**Tip** If you want to use an object, such as an AutoShape, as a watermark, you can paste or insert it into the document header, but you cannot use the Printed Watermark dialog to control the settings for the object.

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# Chapter 8

## Miscellaneous tips and tricks

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This chapter collects some tips and pointers to other sources of macros and information.

- Customizing toolbars and menus
- Using the Work menu
- Using the Office XP clipboard
- Working with document links
- Navigating through a document
- Creating equations
- Inserting symbols and international characters
- Using smart tags—or not
- Removing personal and hidden information from documents
- Automating your work with macros
- Backing up your AutoCorrect entries

### *Customizing toolbars and menus*

Word provides several ways for you to customize the toolbars and menus.

You can set up Word to display the Standard and Formatting toolbars on one row or two, using **Tools > Customize** and clicking the **Options** tab (see page 3).


You can quickly remove or restore standard buttons from any toolbar. To do so, click the **Toolbar Options** arrow at the right-hand end of the toolbar, click **Add or Remove Buttons**, then click the name of the toolbar. A list of buttons is displayed; deselect any that you don't want displayed.

You can add menus to toolbars; for example, see “Using the Work menu” on page 94

You can add other commands to toolbars and menus, using the Customize dialog:

1. On the menu bar, click **Customize > Tools** and choose the **Commands** tab (Figure 73).
2. Change the template shown in the **Save in:** box to the one in which you are storing your customizations. Go through the Categories and Commands lists to find the command you want. Drag the command to a spot on the toolbar or menu and release the mouse button.
3. Close the Customize dialog, hold down the **SHIFT** key, and click **File > Save All** to save the change.

## Add a toolbar button for a different view of the style list

If the Style button  (mentioned on page 50) isn't on your toolbar, you can add it using the Customize dialog.

1. In the Categories list, click **Format**. In the Commands box, scroll far down in the list and find the **Style...** item (the one with an icon containing two letter A's to its left, not the Style: entry with a drop-down list box to its right, which appears near the top of the list).
2. Drag the **Style...** item to the right of the Style drop-down list on the Formatting Toolbar and release the mouse button. The double-A icon appears on the toolbar.

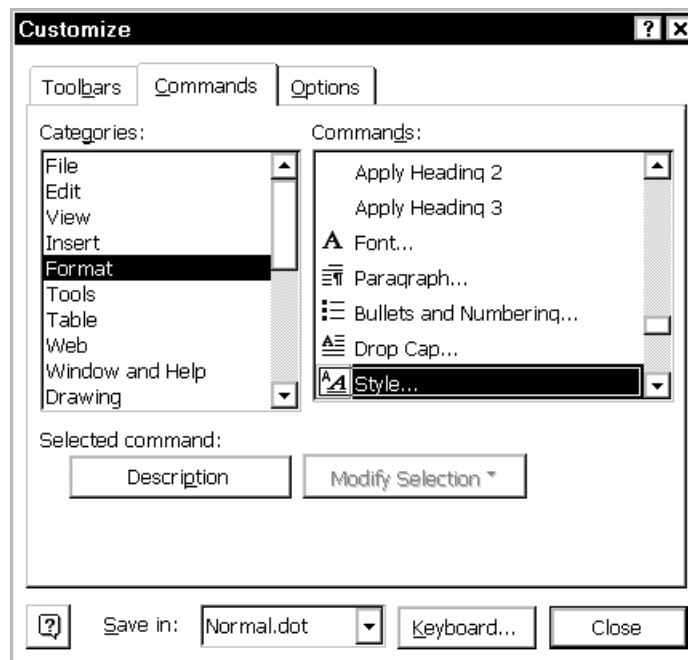


Figure 73. Choosing a toolbar button for a different view of the list of styles

## Using the Work menu

The Work menu gives instant access to files you need frequently. Use it to hold reference documents and current projects that keep falling off the bottom of the recent files list. Do not use it for sample documents (use templates for them) or boilerplate text (use AutoText or AutoCorrect).

### To add the Work menu to your toolbar:

1. From the menu bar, click **Tools > Customize** and choose the **Commands** tab.
2. In the Categories list, select **Built-in Menus** near the bottom of the list.
3. In the Commands list, select **Work**. Drag this menu to a toolbar.
4. Close the Customize dialog.

### To add a document to the Work menu:

1. Open in Word the document you want to add to the menu.
2. Click on the **Work** button, then click **Add to Work Menu**.
3. From then on you can easily access that file directly by clicking on its name.

### To remove files from the Work menu

The Work menu holds a maximum of nine document names. If you try to add a tenth, the file at the bottom falls off the list. You will therefore want to remove files from the list when you no longer need them to be there. To do this:

1. Press **CTRL+ALT+HYPHEN**. The pointer turns into a thick horizontal bar.
2. Click on the item you want to remove from the Work menu.

### If you make a mistake

If you turn on the Delete tool by accident (it's easy to do), immediately press the **ESC** key to cancel this mode and return the pointer to normal.

If you accidentally erase the wrong menu item, one way to recover—if you have “Prompt to save Normal template” checked in the Save options (see page 4)—is to quit Word immediately, and when prompted to save your Normal template, select **No**.

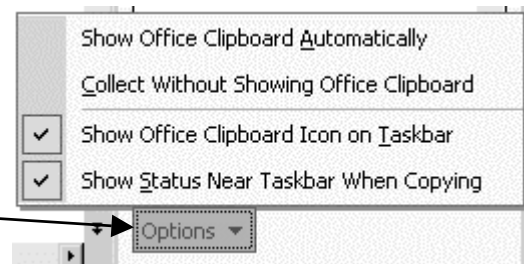
Another way to recover is to reset the affected menu to its default. However, if you have previously customized the menu, the Reset technique will remove all your customizations. In that case, you may prefer to restore the deleted items to the menu rather than resetting the menu.

## Using the Office XP clipboard

The Office XP (or Word 2002) clipboard provides easy-to-use access to multiple items that have been cut or copied from an Office program. The clipboard can contain up to 24 items of text, graphics, spreadsheet data, and other items. The newest entry is always added to the top of the list.

Display the clipboard by opening the task pane and selecting **Clipboard**, or **Edit > Office Clipboard** from the menu bar, or press **CTRL+C** twice.

You can control the clipboard's display by selecting from the options provided at the bottom of the task pane.



To paste an item from the clipboard, position the insertion point where you want the item pasted, then click on it in the Clipboard task pane. You can also paste all of the items at once, by clicking the Paste All button near the top of the task pane.

When you copy multiple items to the Office clipboard, the last item you copy is also copied to the Windows system clipboard. When you use the **Paste** command, the **Paste** button, or the **CTRL+V** shortcut keys, you paste the contents of the Windows system clipboard, not the contents of the Office clipboard.

## Working with document links

If you've linked to graphics, spreadsheets, other Word documents, Web pages, or any other sources, you may want to check what those links are, especially if some of them develop problems.

To check what internal and external links are in a document, click **Edit > Links**. On the Links dialog, you can manually update selected links, change the source from which linked information is derived, or break a link. It's a good, if often tedious, problem-solving tool.

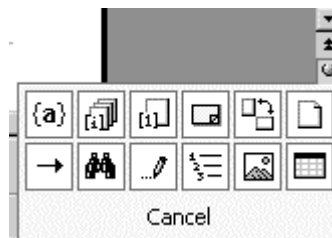
## Navigating through a document

Word provides a variety of ways to navigate quickly through a document, including:

**GoTo dialog.** See “Find items such as bookmarks or comments” on page 22.

**Document map.** Click **View > Document Map** to display on the left-hand side of the screen a list similar to a table of contents. This list can be collapsed or expanded. Click an item on the list to jump to that item in the main document.

**Browse buttons.** A quick way to move around a Word 2002 document is to use the browse buttons on the vertical scroll bar. To select a browse option, click the **Select Browse Object** button on the scroll bar and click on any button on the Browse Object palette. Then, to find the previous or next instance of the object you selected, click the **Previous** or **Next** browse buttons. Very handy for quickly checking all figures, tables, equations or other items.



Browse Object palette

## Creating equations

Equation Editor is the recommended tool for creating equations that you can't easily create using the ordinary letters, numbers, and symbols in Word. However, Equation Editor is not installed automatically when you install Office, unless you have done a custom installation and specified Equation Editor to be included. If you need to install Equation Editor after you install Office, you can do so by using **Add/ Remove Programs** in the Windows Control Panel. See Word's online help for details.

You can also create equations using the EQ (Equation) field. This is useful if you have not installed Equation Editor or if you want to write inline equations. If you double-click an EQ field, Microsoft Word converts the field to an embedded Equation Editor object. For more about fields, see Chapter 5, “Getting the most from fields,” starting on page 57. See Word's online help for details about the EQ field.

MathType is a Word add-in that is good for formulas and lets you save things as GIFs to use in other programs or HTML files. <http://www.mathtype.com/>

## Inserting symbols and international characters

Word 2002 has improved the ways to insert symbols and international characters. The characters in the Symbol dialog are now big enough to see easily, and you can resize the dialog so you can see more symbols. You can also use shortcut keys (usually **ALT+####** where **####** is the character code), AutoCorrect, or type a Unicode character code and press **ALT+X**. The Symbol dialog shows the character code and the shortcut key combination (if one is defined) for the selected character.

## Using smart tags—or not

Smart tags are among the new features in Word 2002. Don't confuse them with “Smart Tags” in Internet Explorer; despite the name, they are not the same thing.

Smart tags are designed to recognize and link information in different programs, so that, for example, you can add a person's name to an Outlook contact folder without needing to open Outlook, or look up stock quantities or prices for products without opening Access.

However, unless your work depends on a lot of integration with other programs, you probably won't want Word to embed smart tags into your documents. They create one more level of complexity that you can usually do without, and they can increase file size dramatically. To stop Word from embedding smart tags, click **Tools > Options > Save** tab and deselect the **Embed smart tags** checkbox.



By default, items identified as smart tags have a purple dotted underline when viewed on screen. Fortunately, you can hide those underlines if you don't want to be distracted by them. On the menu bar, click **Tools > Options > View** tab and deselect the **Smart tags** checkbox. This action does not remove the smart tags.

To remove smart tags from a document, click **Tools > AutoCorrect Options > Smart Tags** tab, then click the **Remove Smart Tags** button. You can also choose to use some smart tags and not others, by making selections on this tab.

### *Removing personal and hidden information from documents*

Before giving a copy of a document to someone else, you may want to remove personal, hidden, or deleted information that you don't want others to see. Here are some things you can do. Several techniques rely on distributing an amended copy of a document, and therefore may not be suitable for some workflow situations.

As discussed on page 4, don't use Fast Save. If you did, turn it off (**Tools > Options > Save** tab, deselect **Allow fast saves**), then save the document, preferably under a different name.

To remove **personal information** from the file properties, comments, track changes, routing slip, e-mail message header, and versions, click **Tools > Options > Security**, select the **Remove personal information from this file on save** checkbox, and save the document.

If you have saved one or more **versions** of the document in the same file, it may contain some information that you don't want others to see. If you don't want to keep the previous versions, delete them from the document. If you want to keep the versions for your own use, save the current version as a separate document (under a different name) and distribute that document instead.

To remove **deleted information** marked as a tracked change, save a copy of the document and accept all changes. To remove all **comments**, click the arrow next to **Reject Change/Delete Comment** on the **Reviewing** toolbar and select **Delete All Comments in Document**.

To remove any other **hidden text**, first display hidden text (**Tools > Options > View** tab; select **Hidden text** under **Formatting marks**), then search for hidden text and delete it (use the technique described in "Replace manual formatting" on page 20).

To remove field codes, you'll need to turn the results into text. Press **CTRL+A** to select the document, then press **CTRL+SHIFT+F9**.

### *Automating your work with macros*

I haven't said much in this book about macros, because it's a big topic deserving a book of its own. You can record some simple macros to make your work easier, without needing to know anything about Word's macro language. The online help explains how to record macros.

You can use the Visual Basic Editor to create macros, including some instructions that you cannot record.

You can also collect add-in templates containing macros that other people have written. See Appendix A for details of some suggested sources:

Electric Editors  
MVPS Word site  
Tech-Tav  
The Editorium  
WordTips

Store those add-in templates in Word's Startup folder so they are available for your use at any time. You can deselect them for any document if you don't want to use them. See "Working with templates and add-ins" on page 46.

## Backing up your AutoCorrect entries

Microsoft provides an AutoCorrect utility to move AutoCorrect entries between computers; you can also use it for backing up your AutoCorrect file. In Word 2002, this utility is part of the Support.dot template, which must be installed on both the source computer and the destination computer.

The Support.dot template is not installed with a typical Office setup, but you can install it at any time using Add/Remove Programs (or Change or Remove Programs, depending on your Windows operating system).

When Support.dot is installed, follow these steps to back up your AutoCorrect entries:

1. Start Word and open Support.dot (it is usually in C:\Program Files\Microsoft Office\Office10\Macros)
2. Click **AutoCorrect Backup**.
3. In the **AutoCorrect Utility** dialog, click **Backup**. Word adds your AutoCorrect entries to a new Word document and then prompts you to save the document.
4. Select the folder where you want the backup file stored and click **Save**.
5. Click **Cancel** to close the AutoCorrect Utility dialog, and then close the Support.dot template.

---

**Tip** If the AutoCorrect utility in Support.dot does not cope with AutoCorrect entries that consist of multiple paragraphs or that contain tables, and if you use AutoCorrect to store those items, you need to use a version of the utility written by Dave Rado and available from the MVPs website, [http://www.mvps.org/word/FAQs/Customization/Export\\_AutocorrectContent.htm](http://www.mvps.org/word/FAQs/Customization/Export_AutocorrectContent.htm)

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To restore the AutoCorrect files to the same or another computer, run the **AutoCorrect Backup** utility, click **Restore**, and follow the prompts.

You can also manually find all the files with the file extension .ACL and back them up or copy them to another computer, making sure to put them in the appropriate folders.

# Appendix A

## For more information

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This appendix lists some printed and electronic reference materials, and some software tools for manipulating graphic files.

### **Books (printed)**

Bott, Ed and Leonhard, Woody, *Special Edition Using Microsoft Office XP*, Que, 2001, ISBN 0789725134. Excellent introduction to Word, Excel, Outlook, PowerPoint, Access, and FrontPage, and how they all fit together, written at an intermediate to advanced level. A purchase of the book also entitles you to download a copy of Woody's Office Power Pack XP.

Camarda, Bill, et.al, *Special Edition Using Microsoft Word 2002*, Que, 2001, ISBN 0789725150. Includes more intermediate to advanced detail than could fit into a book on Office XP.

### **Electronic (Web sites, e-mailed newsletters, macro suites, other tools)**

Web sites and their addresses change frequently, often without warning or redirection to their new location. This list was up to date in October 2002.

Alki Software Corporation, <http://www.alki.com/>, has tools for Microsoft Office, including proofing tools (spelling dictionaries, hyphenation files, and thesauri) for over two dozen languages. You can go directly to those tools at <http://www.proofing.com/>

Barnhill, Suzanne S. and Dave Rado, Table basics, <http://www.mvps.org/word/FAQs/TblsFldsFms/TableBasicsContent.htm>

Electric Editors' macro library contains a selection of macros for Microsoft Word (Windows or Macintosh) and WordPerfect for Windows. Most of them are geared to editorial tasks, but some have more general uses. <http://www.electriceditors.net/macros/index.htm>

Hudson, Steve, "Editioning" template for conditional text in Word. <http://www.editorium.com/ftp/editioning.zip>

Instructions for using this template are here:

<http://www.topica.com/lists/editorium/read/message.html?mid=1708466498>

Knopf, David, "Autonumbering with RoboHELP and Microsoft Word," <http://www.knopf.com/tips/autonumber.html>

MathType is a Word add-in that is good for formulas and lets you save things as GIFs to use in other programs or HTML files. <http://www.mathtype.com/>

Microsoft's Office Assistance, Support, and Download Centers, for tips and solutions to common problems with Word, as well as free downloads, including patches, file viewers and converters. <http://office.microsoft.com/Downloads/default.aspx>  
<http://office.microsoft.com/assistance/2000/tipsWord.aspx>  
<http://office.microsoft.com/assistance/2000/ALword.aspx>  
<http://support.microsoft.com/default.aspx?xmlid=fh%3BEN-AU%3Bwrd20>

MVP Word site includes tutorials and an FAQ by people associated with Microsoft's Most Valuable Professional program. <http://www.mvps.org/word/>

Rado, Dave, "How to sidestep the problems of the Word 2000 (and higher) Table Properties dialog,"

<http://www.mvps.org/word/FAQs/TblsFldsFms/TablePropProbsContent.htm>

Rado, Dave, "Maximising the performance of Word tables,"

<http://www.mvps.org/word/FAQs/TblsFldsFms/FastTablesContent.htm>

Rado, Dave, "How can I import and export all my AutoCorrect entries, so they can be transferred to another machine?,"

<http://www.mvps.org/word/FAQs/Customization/ExportAutocorrecContent.htm>

TechTav macro suite completely replaces the Master Document, AutoNumbering, AutoHeadingNumbering, Insert Captions and Insert Cross-Reference features.

<http://www.tech-tav.com/guides.html>

The Editorium, from Jack M. Lyons, provides Microsoft Word add-in templates for editors, writers, typesetters, and other publishing professionals, and a newsletter of tips for using Word. <http://www.editorium.com/>

To subscribe to the newsletter, Editorium Update, send a blank e-mail message to [editorium-subscribe@topica.com](mailto:editorium-subscribe@topica.com)

The first year's newsletters are collected in an e-book, *Total Word Domination*, which is available from the website.

Weber, Jean Hollis, *Technical Editors' Eyrie*. Contains copies of my publications and other resources. Free newsletter available. <http://www.jeanweber.com/>

*Woody's Office Watch* is a free weekly e-mailed newsletter from Woody Leonhard.

To subscribe, visit <http://www.woodyswatch.com/office/index.asp>

A useful companion newsletter is *Woody's Office for Mere Mortals*, from <http://www.woodyswatch.com/wowmm/index.asp>

Word-PC discussion list. Archives at <http://listserv.liv.ac.uk/archives/word-pc.html>

To join, send e-mail to [word-pc-subscribe-request@liverpool.ac.uk](mailto:word-pc-subscribe-request@liverpool.ac.uk)

WordTips is a free weekly e-mailed newsletter of tips and tricks for using Word, from Allen L. Wyatt of Discovery Computing Inc. To subscribe, visit his website, which includes other relevant resources. <http://www.VitalNews.com/>

# Appendix B

## Glossary

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*This glossary includes publishing and computing terms used in this book. The definitions are adapted from several sources, including the Microsoft Press Computer Dictionary, Third Edition, 1998; FOLDOC, the Free On-Line Dictionary of Computing (<http://www.wombat.doc.ic.ac.uk/foldoc/>), and various other dictionaries reached from the search engine Onelook (<http://www.onelook.com/>).*

**AutoText.** *n.* In Microsoft Word, a place to store frequently-used text and graphics, such as product names, boilerplate text, specialist terms, or a company logo; writers can retrieve the information with a few keystrokes. If AutoText is inserted into a document as a field, the writer can change the AutoText entry to update all places in a document where the entry appears.

**bitmap.** *n.* Pictures (also called images) made from a series of small dots. Bitmaps are created with and edited in paint programs, such as Microsoft Paint. All scanned graphics and photographs are bitmaps.

**boilerplate.** *n.* Frequently used text (such as legal disclaimers and other standard paragraphs) that is copied into many documents.

**bookmark.** *n.* In a Word document, identifies a location or text selection within a file that you can later refer or link to.

**bullet.** *n.* A heavy dot or other symbol used to mark items in a list. A bulleted list (also called an unordered list) is used when the list items are not in a particular order.

**click.** *vb.* To press and release a mouse button once without moving the mouse. Clicking is usually performed to select or deselect an item or to activate a program or program feature. See *also* right-click, double-click, drag.

**color depth.** The number of possible colors or shades of gray that can be included in a particular image. 8-bit images can represent as many as 256 colors; 24-bit image can represent approximately 16 million colors.

**color palette.** *n.* A subset of all the possible colors that establishes which colors can be displayed on the screen at a particular time, or which colors are used in a set of images.

**compress.** *vb.* To modify a file (using a special program) to save storage space or transmission time; used, for example, in data communications, facsimile transmission, and CD-ROM publishing.

**crop.** *vb.* To cut off part of an image, such as unneeded sections of a graphic or extra white space around the borders; used to refine or clean up a graphic for placement in a document.

**cursor.** *n.* An on-screen indicator, such as a blinking underline or rectangle, that marks the place at which a keystroke will appear when typed. In graphical user interfaces, the cursor is often a vertical bar, known as the insertion point.

**deselect.** *vb.* To reverse the action of selecting an option, a range of text, a collection of graphical objects, and so on. *Compare* select.

**dialog** (also called dialog box). *n.* In a graphical user interface, a special window displayed by the system or application to request a response from the user.

**directory**. *n.* A catalog for file names and other directories stored on a disk, organizing and grouping the files. In the Macintosh and Windows 95 operating systems, directories are called *folders*.

**dither**. *vb.* To simulate a color that is not part of the current palette, by combining pixels of different colors close to each other. To save file space, Web graphic designers often limit their images to 256 colors and use dithering to imply other colors. If designers don't do this, and if a computer can't handle the colors, its Web browser may try to dither the image, possibly with unattractive results.

**document**. *n.* Any self-contained piece of work created with an application program and, if saved on disk, given a unique filename by which it can be retrieved. Documents include word-processor files, spreadsheets, and other files.

**double-click**. *vb.* To press and release a mouse button twice quickly, without moving the mouse; a means of rapidly selecting and activating a program or program feature. *Compare* click, drag, right-click.

**download**. *vb.* **1.** In communications, to transfer a copy of a file from a remote computer to the requesting computer by means of a modem or network. **2.** To send a block of data, such as a PostScript file, to a dependent device, such as a PostScript printer. *Compare* upload.

**drag** (also called drag-and-drop). *vb.* In graphical user interfaces, to move an image, window, or other object from one place on the screen to another by positioning the mouse pointer over the object, then pressing and holding the mouse button while moving the mouse.

**drawing canvas**. *n.* In a Word document, an area upon which you can draw multiple shapes, which can then be moved and resized as a unit.

**drawing object**. *n.* Any graphic you draw or insert into a Word document. Drawing objects include AutoShapes, curves, lines, and WordArt.

**electronic publishing**. *n.* Distributing information via electronic media, such as communications networks or CD-ROM, or by placing the material on a Web site.

**embedded object**. *n.* An object (such as a graphic file) that is inserted into a Word document and becomes part of the Word document. An embedded object does not maintain a connection with the source file and cannot be updated when the source file is updated. Contrast with *linked object*.

**EPS** (Encapsulated PostScript). *n.* A PostScript file format used for incorporating images into the PostScript output of an application such as a desktop publishing program. Many high-quality clip-art packages consist of such images. *See also* PostScript.

**field**. *n.* **1.** A space in an on-screen form or dialog where the user can enter a specific item of information. **2.** A placeholder for data that might change in a document.

**file**. *n.* A complete, named collection of information, such as a program, a set of data used by a program, or a user-created document. A file is the basic unit of storage that enables a computer to distinguish one set of information from another.

**floating object**. *n.* A graphic or other object that is inserted in the drawing layer so that you can position it precisely on the page or in front of or behind text or other objects.

**folder**. *n.* In graphical user interfaces such as the Macintosh and Microsoft Windows, a container for programs and files; a means of organizing programs and documents on a disk. Called a directory in other systems, such as MS-DOS and UNIX.

**font.** *n.* A set of characters of the same typeface (such as Garamond), style (such as italic), and weight (such as bold). A font consists of all the characters available in a particular style and weight for a particular design; a typeface consists of the design itself. Fonts are used by computers for on-screen displays and by printers for hard-copy output.

**footer.** *n.* One or more identifying lines printed at the bottom of a page. A footer may contain a page number, a date, the author's name, and the document title. *Also called* running foot. *Compare* header.

**GIF** (Graphics Interchange Format). *n.* A graphics file format used for transmitting images on the Internet. *Compare* JPEG, PNG, TIFF.

**header.** *n.* In word processing or printing, one or more identifying lines printed at the top of a page. *Also called* running head. *Compare* footer.

**heading.** *n.* A title or caption introducing a chapter, section, or topic in a document.

**highlight.** *vb.* To alter the appearance of displayed characters as a means of calling attention to them, as by displaying them in reverse video (light on dark rather than dark on light, and vice versa), with greater intensity, or in a different color. Used to indicate an item, such as an option on a menu or text in a word processor, that is to be acted on in some way.

**HTML** (Hypertext Markup Language). *n.* The markup language used for documents on the World Wide Web. HTML uses tags to mark elements, such as text and graphics, in a document to indicate how Web browsers should display these elements to the user and should respond to user actions such as activation of a link by means of a key press or mouse click.

**hyperlink.** *n.* A connection between an element in a hypertext document, such as a word, phrase, symbol, or image, and a different element in the document, another hypertext document, a file, or a script. The user activates the link by clicking on the linked element. *Also called* hot link, hypertext link.

**hypermedia.** *n.* The integration of any combination of text, graphics, sound, and video into a system of information storage and retrieval in which users jump from subject to related subject in searching for information. If the information is primarily in text form, it is regarded as hypertext; if video, music, animation, or other elements are included, the information is regarded as hypermedia.

**hypertext.** *n.* Text linked together in a complex, non-sequential web of associations in which the user can move through related topics.

**inline object.** *n.* A graphic or other object that is positioned directly in the text of a Microsoft Word document at the insertion point.

**insertion point.** *n.* In graphical user interfaces, a blinking vertical bar that marks the location at which inserted text will appear. *See also* cursor.

**JPEG** (Joint Photographic Experts Group). *n.* A standard for storing images in compressed form; often used on Web pages. A graphic stored as a file in the JPEG format has the file ending .JPG. *See also* GIF, PNG, TIFF.

**landscape orientation.** *n.* A horizontal print orientation in which text or images are printed so that the width of the image on the page is greater than the height. *Compare* portrait orientation.

**linked object.** *n.* An object (such as a graphic or spreadsheet) that is inserted into a Word document while maintaining a connection to the source file. The linked object can be updated when the source file is updated. You can also insert a pointer to the source file without including the contents of that file in the Word document. Contrast with *embedded object*.

**macro.** *n.* A series of Word commands and instructions that you group together as a single command to accomplish a task automatically. You can create macros using the macro recorder or the Visual Basic Editor.

**markup language.** *n.* Codes inserted into an electronic document to indicate how it is to be printed or displayed. SGML, HTML and XML are examples of markup languages.

**menu.** *n.* A list of options from which a user can make a selection in order to perform a desired action, such as choosing a command or applying a particular format to part of a document.

**menu bar.** *n.* A rectangular bar displayed in an application program's on-screen window, often at the top, from which menus can be selected by the user. Names of available menus are displayed in the menu bar; choosing one with the keyboard or with a mouse causes the list of options in that menu to be displayed.

**monitor.** *n.* A video display device on which images generated by the computer's video adapter are displayed; usually refers to a video display and its housing which are separate from the main computer. On a laptop computer, this device is usually known as the *screen* or the *display*.

**multimedia.** *n.* The combination of sound, graphics, animation, and video; a subset of hypermedia, which combines these elements with hypertext. *See also* hypermedia, hypertext.

**palette.** *See color palette.*

**PDF (Portable Document Format).** *n.* The file format for Adobe Acrobat. PDF represents documents in a manner that is independent of the original application software, hardware, and operating system used to create those documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution-independent format.

**PNG (Portable Network Graphics).** *n.* A file format for bitmapped graphic images, designed to be a replacement for the GIF format. *See also* GIF, JPEG, TIFF.

**point.** *vb.* In graphical user interfaces, to place the mouse pointer over an on-screen item.

**pointer (also called mouse pointer).** *n.* In graphical user interfaces, an on-screen element whose location changes as the user moves the mouse.

**portrait orientation.** *n.* A vertical print orientation in which a document is printed across the narrower dimension of a rectangular sheet of paper. This is the print mode typical of most letters, reports, and other such documents. *Compare* landscape orientation.

**resample.** *vb.* Also known as *downsample*. To reduce file size by throwing out some data, for example to meet narrow bandwidth requirements. With images, resampling is usually involved when using a graphics program to make the dimensions of an image smaller. When done correctly, the resampled image retains the sharpness of the original.

**resize.** *vb.* Reducing the dimensions of an image without reducing the file size, for example when inserting an image into Word. Resizing often results in distortion of some parts of an image, for example the text in a screen capture.

**right-click.** *vb.* To make a selection using the button on the right side of a mouse or other pointing device. Doing so in a Windows 95/98 environment typically displays a pop-up menu with options applicable to the object over which the cursor is positioned. *See also* click, double-click, drag.

**screen.** *n.* The display area on a computer monitor or laptop computer.

**screen tips.** *n.* A Microsoft term for the words that pop up when you pause the mouse pointer over an icon or other item for a short time. *See also* tooltips.



**select.** *vb.* To specify a block of data or text on screen by highlighting it or otherwise marking it, with the intent of performing some operation on it.

**style.** *n.* A collection of formatting specifications that is given a name. Word 2002 supports **character** styles (typeface, font size, bold, italic, superscript, among others), **paragraph** styles (line spacing, space before and after, first line indent, borders and shading, plus a character style for the paragraph), **table** styles, and **list** styles.

**tabs.** *n.* Indicators, much like the labels on file folders in a filing cabinet, that show in dialogs that have several pages.

**template.** *n.* In word processing and desktop publishing programs, a predesigned document that contains formatting and, in many cases, generic text.

**TIFF** (Tagged Image File Format). *n.* A standard file format commonly used for scanning, storage, and interchange of graphic images. *Compare* GIF, JPEG, PNG.

**toolbar.** *n.* In a graphical user interface, a row, column, or block of on-screen buttons or icons. For example, word processors often feature toolbars with buttons for changing text to italic, boldface, and other styles. *Compare* menu bar.

**tooltips.** *n.* Microsoft term for a specific form of screentip that shows when you pause the mouse pointer over an icon on the toolbar. *See also* screentips.

**typeface.** *n.* A specific, named design of a set of printed characters, such as Helvetica Bold Oblique, that has a specified obliqueness (degree of slant) and stroke weight (thickness of line). A typeface is not the same as a *font*, which is a specific size of a specific typeface, such as 12-point Helvetica Bold Oblique. Nor is a typeface the same as a *typeface family*, which is a group of related typefaces, such as the Helvetica family including Helvetica, Helvetica Bold, Helvetica Oblique, and Helvetica Bold Oblique. *See also* font.

**upload.** *vb.* To transfer a copy of a file from a local computer to a remote computer. *Compare* download.

**URL** (Uniform Resource Locator). An address for a resource on the Internet. Used by Web browsers to locate Internet resources.

**watermark.** *n.* Text or pictures that appear behind document text. One common use is to mark a document as a draft.

**Web page.** *n.* A document on the World Wide Web. A Web page consists of an HTML file, with associated files for graphics and scripts, in a particular directory on a particular machine (and thus identifiable by a URL).

**Web site.** *n.* A group of related HTML documents and associated files, scripts, and databases that is available on the World Wide Web. *See also* HTML, browser.

**wildcard.** *n.* A keyboard character that can be used to represent one or many characters.

**window.** *n.* In applications and graphical interfaces, a portion of the screen that can contain its own document or message.

**WYSIWYG** (What You See Is What You Get). *adj.* A document view in which a user sees the document as it will appear in the final product, and can directly edit the text, graphics, or other elements within a view.

**XML** (eXtensible Markup Language). *n.* A markup language derived from SGML.

**zip.** *vb.* To create a compressed archive from one or more files using an archiving program. *n.* A compressed file created in this way.

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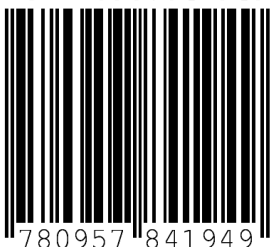
## About the author

Jean Hollis Weber has a Master of Science degree in botany and over 25 years of experience as a scientific and technical editor and writer in the fields of biology, mathematics, engineering, and computing. She has taught short courses in writing and editing and lectured to graduate and undergraduate classes in writing and editing at several universities.

Jean Hollis Weber  
P.O. Box 640  
Airlie Beach, Qld. 4802  
Australia  
jean@jeanweber.com

The Technical Editors' Eyrie: <http://www.jeanweber.com>

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