SAVE TIME AND YOUR SANITY: Increase your efficiency with Microsoft Word

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About me

❖ Used Microsoft Word since early 1990s

❖ Written hundreds of 'how to' and troubleshooting blog posts on Word

❖ Since 2008, edited and formatted 1800+ long, complex Word documents for large team of authors (mostly environmental scientists)

❖ **Note:** All examples/file paths etc. in this presentation are from Windows 7 and Word 2010 and/or 2013. Mac users should be able to do similar things… but no guarantees.

What I'll cover

❖ Show everything

❖ Put most-used functions close to you

❖ Automate as much as you can

Show everything

Takeaway:

- You can't fix what you can't see

Show all general formatting marks

- **Home** tab > ¶ (pilcrow icon)
- Strange for a few days—persevere for two weeks to get used to it
- Why show these marks?
  - Shows how the author formatted the doc
  - Shows inconsistencies in use of spaces, tabs, etc.
  - Helps you troubleshoot Word formatting issues

What the formatting marks mean

- Black squares (peach)—paragraph settings apply (e.g. Keep With Next)

- Arrows (yellow)—tab inserted (auto [e.g. outline numbering] and manual look the same)

- Dots (green)—space between words

- Left-turn arrow (red)—soft line break

- 'Degree' (cyan)—nonbreaking space between value and unit of measure

- Pilcrow (purple)—end of paragraph

- Double dotted line (pink)—Section break; single dotted line—hard page break

6.4 → Methods¶

6.4.1→Invertebrate·Sampling·Transect¶
Each·transect·will·include·ten·pitfall·traps↵
comprising·43°mm·internal·diameter·plastic·vials,·half·fu
intervals.··Pitfall·traps·will·be·left·open·for·five·days.··Ne
hour·period·to·reduce·digging-in·effects.¶
¶
Vegetation-based· sampling· will· consist· of· vacuum· s
vacuum·samples·will·be·run·parallel·along·the·pitfall·tr
long·and·to·a·maximum·of·15°m·to·one·side·of·the·pitfal
¶——————————————————Section Break (Continuous)
¶
———————————————————————Page Break———————————

Show special formatting

File ➜ Options ➜ Advanced

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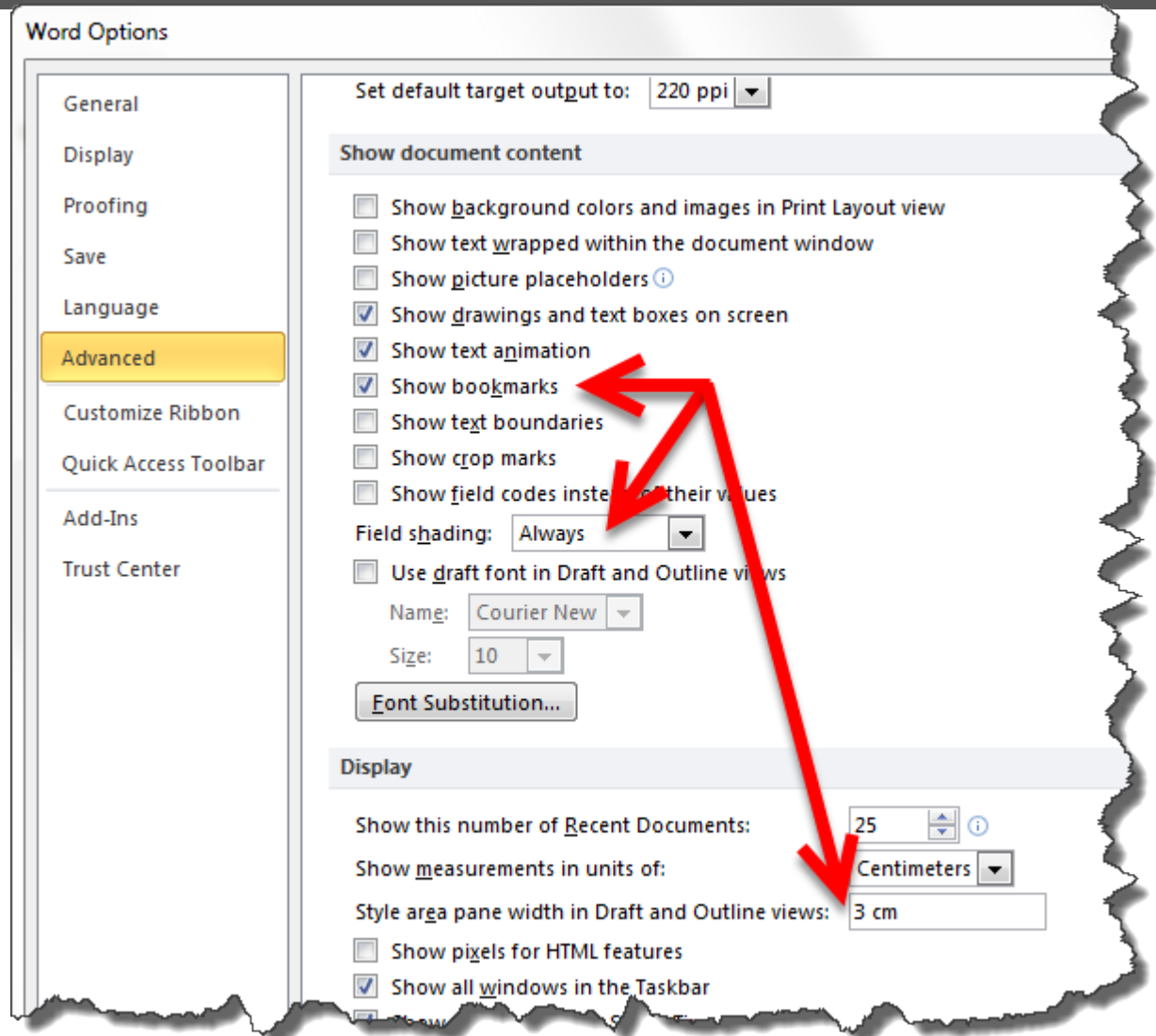
How bookmark formatting looks

❖ Light grey square brackets surround bookmarked text

Document No:¤	[G1-NT-PLNX0000303]¤	Revision:¤	[A]¤
Revision Date:¤	[10 December 2014]¤	Copy No:¤	¤
IP Security:¤	[Company Confidential]¤	¤	¤

How field shading looks

❖ Grey shading shows behind anything that's a field:

- ▪ Automated fields: contents, caption numbering, etc.
- ▪ Manually inserted fields: header text from a bookmark, cross-references, etc.

Rhonda's rule:

Don't touch the grey stuff!!

Show styles

- ❖ When checking author's formatting, display styles for each paragraph on the side:
  - ▪ Open the Styles pane (**Ctrl+Shift+Alt+S**)
  - ▪ Set a value in **File ➔ Options ➔ Advanced ➔ Display** subsection ➔ **Style area pane width…** (e.g. 1 in, 3 cm)
  - ▪ Switch to **Draft** mode:
    - ○ Word 2010: Icon on bottom of window
    - ○ Word 2013: **View** tab (or **Ctrl+Alt+N**)
  - ▪ Look for incorrect styles

- ❖ Note: Styles within tables and text boxes are not shown

Styles

Heading 1

·3.0→ Proposal·Description¶

Body Text

facilities·include,·but·are·not·limited·to:¶

List Bullet

• → ·Processing·Area:¶

List Bullet

List Bullet

List Bullet

List Bullet

• → ·facilities:¶

List Bullet

List Bullet

List Bullet

List Bullet

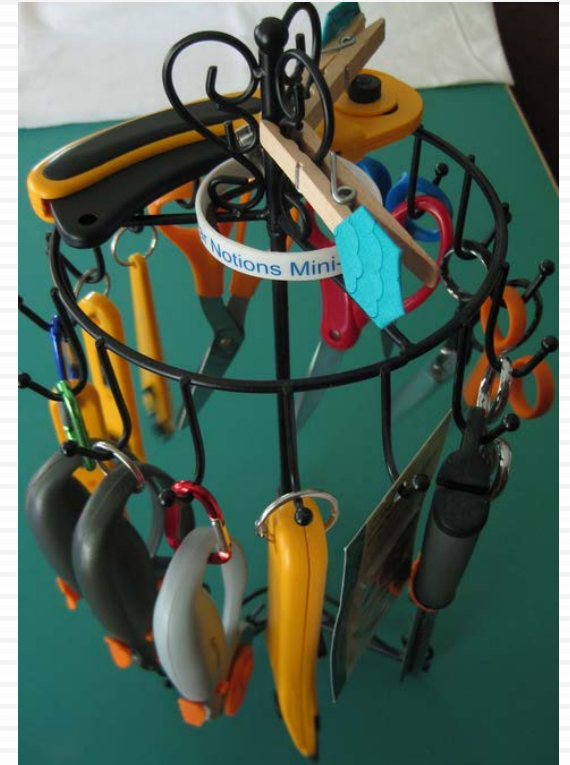List Bullet

List Bullet

List Bullet

Show track changes

❖ Show track changes (**Review** tab):

▪ Insertions and deletions

▪ Comments

▪ Turn off formatting track changes unless told otherwise (+ accept all formatting changes)

❖ Flip between views:

▪ Word 2010: **Final** and **Final Showing Markup**

▪ Word 2013: **No Markup** and **All Markup**
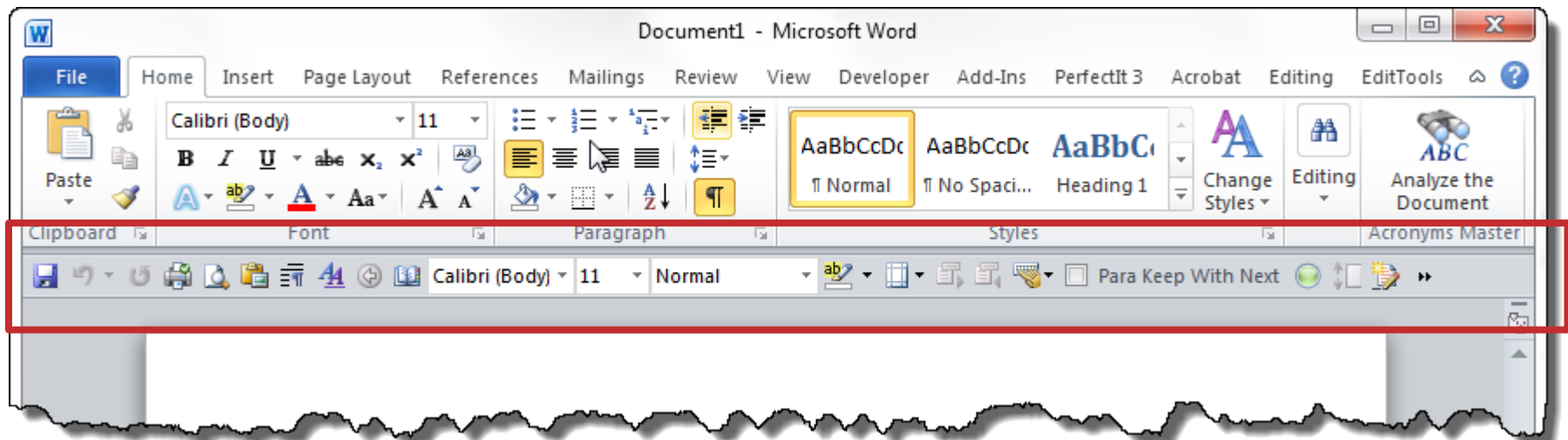
Set up your workspace

Takeaway:

❑ Put your most-used tools near your work area

Workspace: Quick Access Toolbar

❖ Put your most-used commands onto your QAT

  ▪ https://cybertext.wordpress.com/2014/07/15/microso
    ft-office-quick-access-toolbar-productivity-benefits-
    how-to-customize-it/

❖ Put your QAT below the ribbon for easier access

Workspace: Your own ribbon

❖ Create a ribbon with your most-used commands and arrange how you want

- ▪ https://cybertext.wordpress.com/2015/02/02/word-create-a-custom-tab-for-your-most-used-tools/
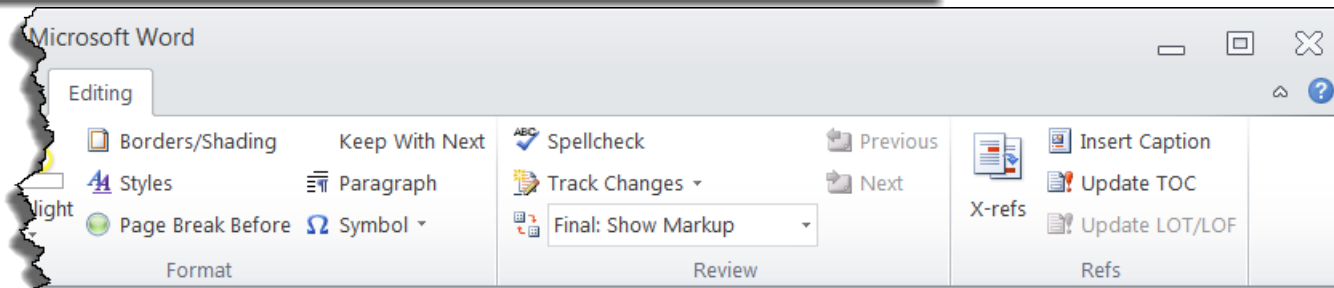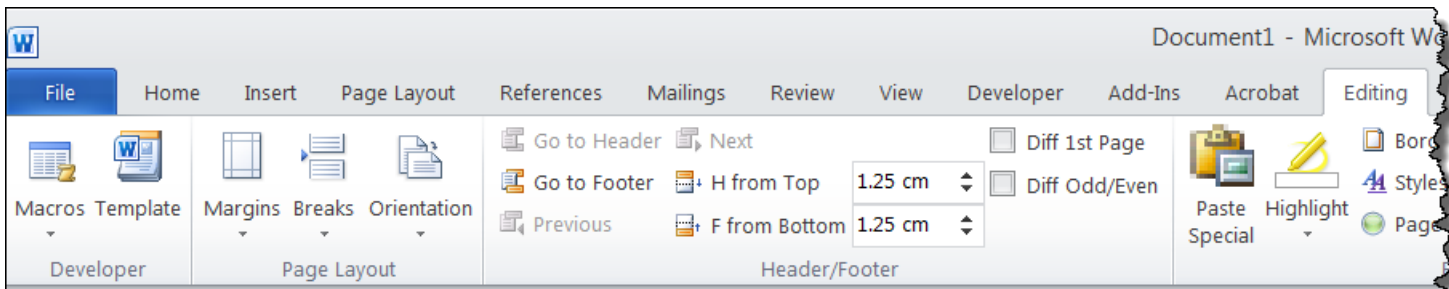
Workspace: Status Bar

❖ Add some of your most-used functions to the status bar (limited selection)
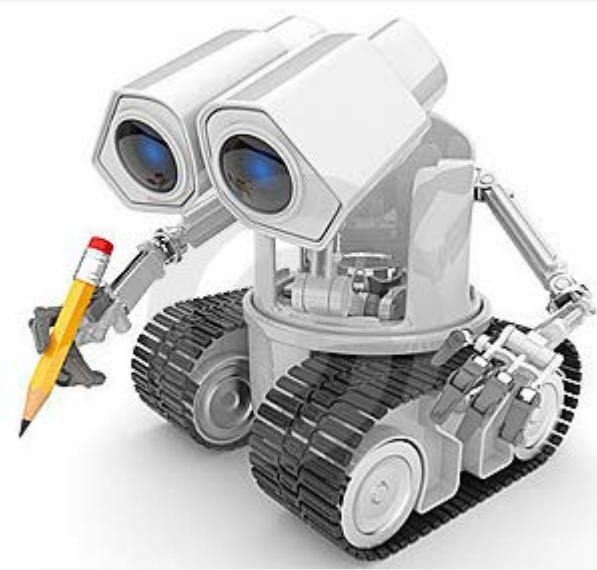
❖ Right-click in the status bar to show this list

Customize Status Bar

	Formatted Page Number	1
	Section	1
✓	Page Number	1 of 1
	Vertical Page Position	2.5cm
	Line Number	1
	Column	1
✓	Word Count	0
✓	Number of Authors Editing	
✓	Spelling and Grammar Check	
✓	Language	English (Australia)
✓	Signatures	Off
✓	Information Management Policy	Off
✓	Permissions	Off
	Track Changes	Off
	Caps Lock	Off
	Overtype	Insert
	Selection Mode	
✓	Macro Recording	Not Recording
✓	Upload Status	
✓	Document Updates Available	No
✓	View Shortcuts	
✓	Zoom	100%
✓	Zoom Slider	

Workspace: Share your settings

- ❖ Copy QAT/ribbon settings to another PC: http://wordribbon.tips.net/T009920_Copying_the_Quick_Access_Toolbar.html

- ❖ Backup your ribbon/QAT: http://www.howtogeek.com/72670/how-to-backup-and-restore-your-office-2010-ribbon-and-quick-access-toolbar-customizations/

19 Automate tasks

Takeaways:

- ❑ Key to efficiency is automating routine tasks
- ❑ Life's too short to do something manually if you can automate it
- ❑ BUT: Not everything can—or should—be automated

Types of automation

- AutoCorrect
- Keyboard shortcuts (in-built; own; for macros)
- Find and replace (general; wildcards)
- Macros (own; others')
- Table of contents (list of figures/tables)
- Quick Parts and AutoText

AutoCorrect is your friend

- ❖ AutoCorrect = consistent EVERY time

- ❖ Word 2010/2013: **File ➜ Options ➜ Proofing ➜ AutoCorrect Options**

- ❖ Set up once in Word to work across ALL Office programs

AutoCorrect is your friend

❖ Use codes/abbreviations that you will remember

❖ Add a symbol (e.g. period, underscore):

- if the code is also a real word or abbreviation (e.g. **.epa** instead of **epa** for 'Environmental Protection Authority')

- to place the entry at the beginning of the list

❖ Use for words/phrases AND paragraphs

- Alternative: AutoText under Quick Parts

❖ Option to retain formatting

- e.g. superscript, subscript, bold, italics

AutoCorrect examples

Names

(e.g. depts, orgs, companies, products, projects, places, docs…)

- **.epa** = Environmental Protection Authority
- **ggd** = Gorgon Gas Development
- **jfgp** = Jansz Feed Gas Pipeline
- **.paw** = Department of Parks and Wildlife
- **.wa** = Western Australia
- **.rob** = Reverse Osmosis Brine Disposal via Ocean Outfall Environmental Management and Monitoring Plan

Commonly used text

- Copyright and other legal statements
- Regularly inserted editorial comments, such as:
  - **.bs** = Be specific
  - **.spell** = Spell out in full here and define in Terms list if this term is used more than once in the document
  - **.term** = Is this the correct word/term for this context?
  - **.sense** = This doesn't make sense as written. Words or punctuation missing or need to be added? Split sentence? Reword?

AutoCorrect: Share your settings

❖ Location of all ACL files: **C:\Users*<username>*\ AppData\Roaming\Microsoft\Office**

❖ Copy the set of ACL files from one computer and replace the set in the same location on the other computer

Note: The MSO numbers indicate the language; e.g.:
  MSO0127.acl = Math
  MSO1033.acl = English (US)
  MSO2057.acl = English (UK)
  MSO3081.acl = English (Australia)
  See https://msdn.microsoft.com/en-us/goglobal/bb964664.aspx for a full list of locale numbers

Keyboard shortcuts

Use them!

More efficient than hunting the ribbon for the command

More efficient than using the mouse to access the command and returning to where you were

More ergonomically sound to use your fingers and reduce 'mouse grip' stresses

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Keyboard shortcuts: In-built

❖ Examples of lesser known shortcuts:

| Press these keys	To do this
Ctrl+Shift+e	Toggle track changes on/off
Ctrl+Alt+m	Insert a comment
F4	Repeat immediate last action
Shift+F3	Toggle case
Ctrl+Shift+space	Insert a nonbreaking space
Ctrl+= / Ctrl+Shift+=	Make selection subscript / superscript
Ctrl+Shift+c / Ctrl+Shift+v	Copy / paste the selection's style
Ctrl+hyphen	Insert a nonbreaking hyphen

Keyboard shortcuts: List all in-built

1. Open a blank document.

2. Go to **View** tab > **Macros**.

3. Select **Word Commands** from the **Macros in** list.

4. Select **ListCommands**.

5. Click **Run**.

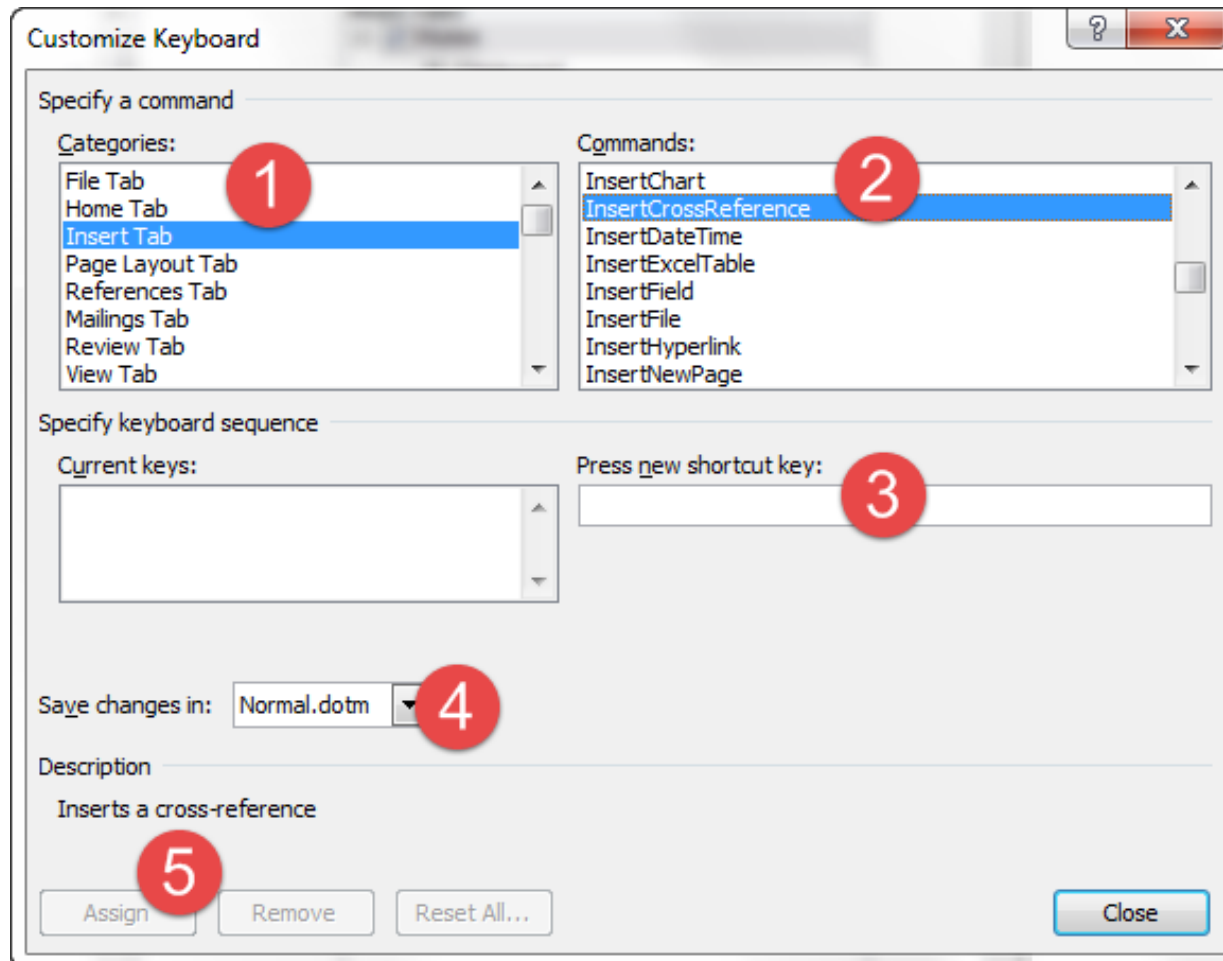Also: http://support.microsoft.com/en-us/kb/290938

Keyboard shortcuts: Your own

❖ You can add a keyboard shortcut for any command that doesn't already have one, including macros
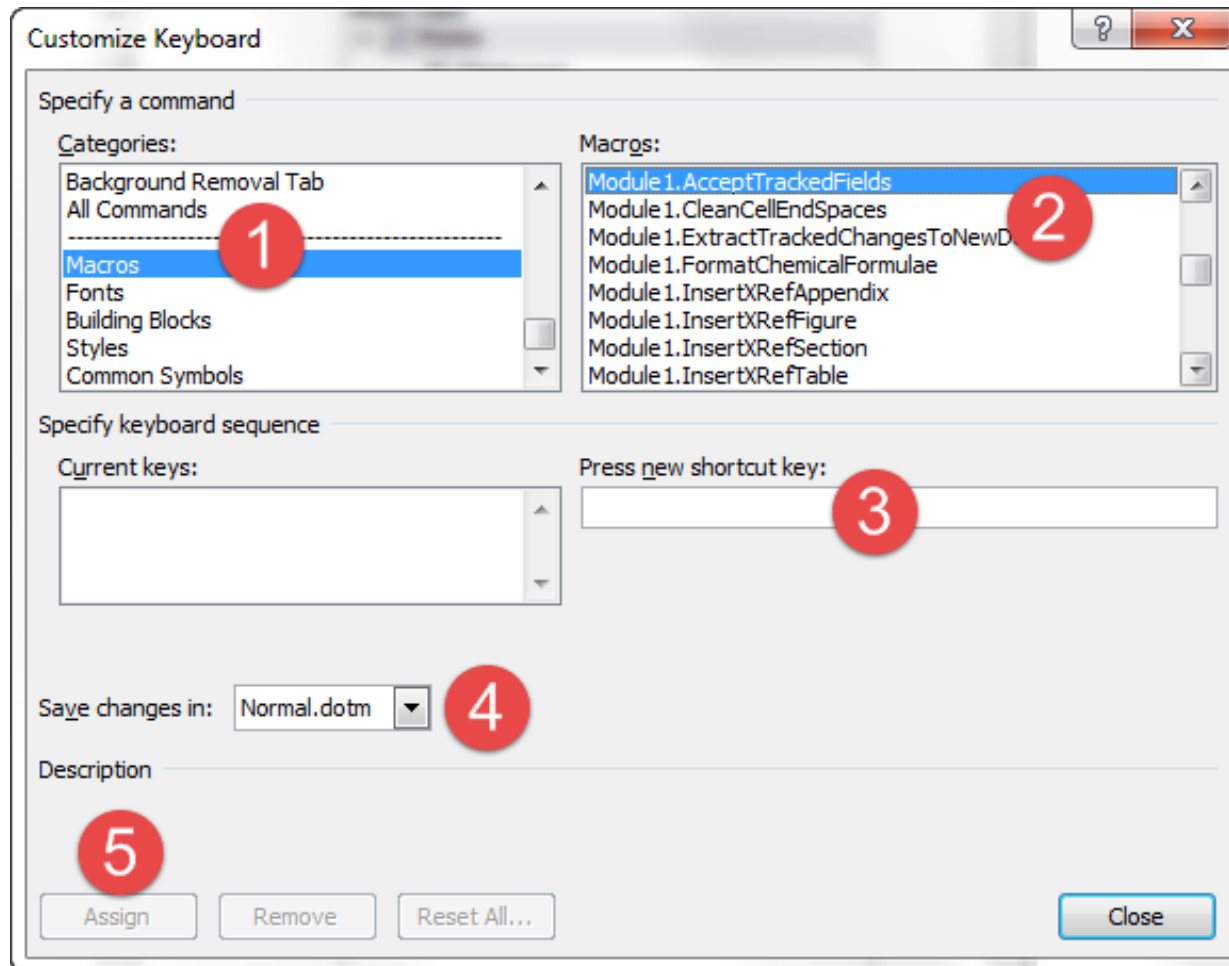
❖ **File ➜ Options ➜ Customize Ribbon**
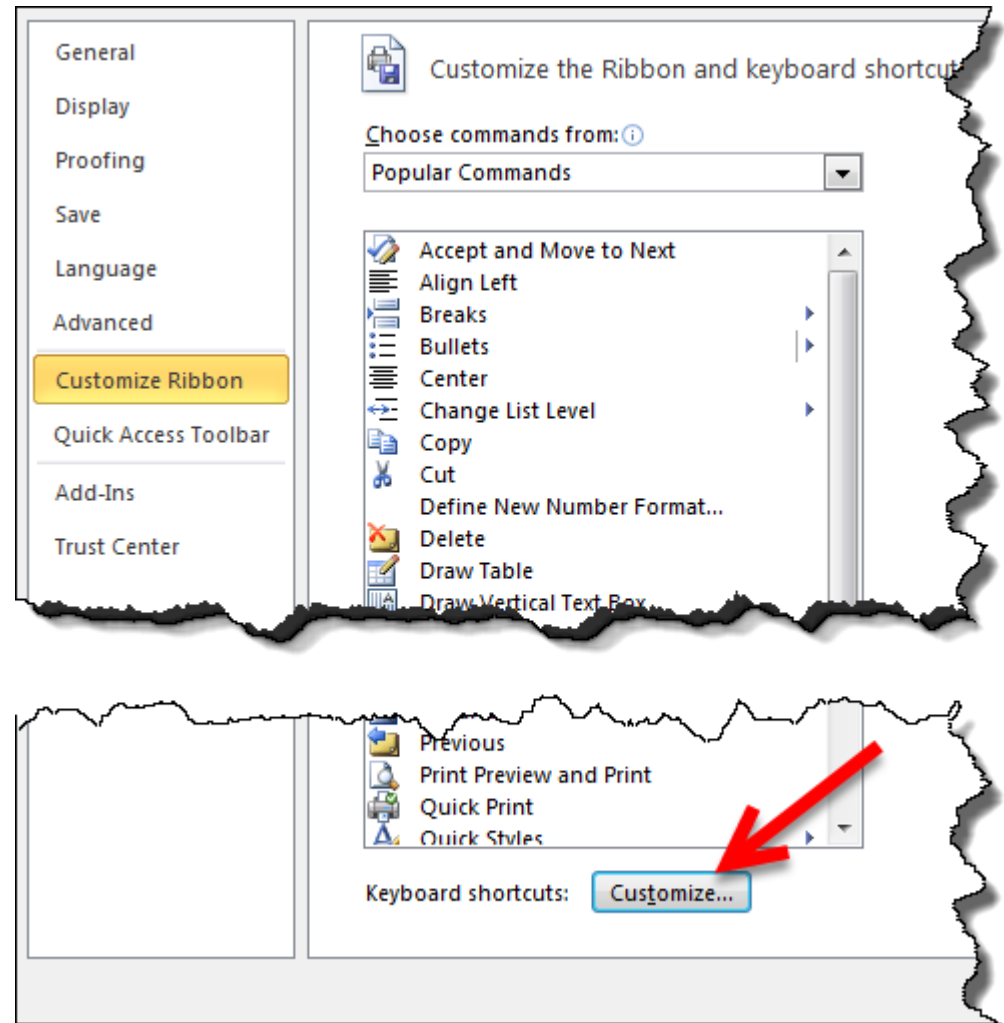
Keyboard shortcuts: Your own

Keyboard shortcuts: For macros

Find and replace: General

Ctrl + F

Basic search in Navigation panel; has highlighting; can click results list item to jump to location; also tabs to navigate by headings or thumbnails; use search icon for some options that used to be on Object Browse button

Ctrl + H

Opens Find and Replace window with all find/replace functions; click **More** to get full range of options

Global changes

Find and Replace window: Quick and easy way to find and/or make global changes to text, styles, formatting

More options

Can set to match case, single words, use wildcards, search for special characters, formatting, etc.

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Find and replace: Wildcards

- ❖ **Use wildcards** option is under **More** button on Find and Replace window (Ctrl+H)
- ❖ Uses 'regular expressions' to perform find/replace
- ❖ Very powerful
  - ▪ always check results with **Find Next** before replacing
  - ▪ MUCH safer to use **Replace** than **Replace All**
- ❖ Takes a while to learn

Find and replace: Wildcards: Examples

Simple

- Find any numeral followed by a space followed by a specified unit of measure (mm). Replace the space with a nonbreaking space.
  * Find what: **([0-9])( )(mm)**
  * Replace with: **\1^s\3**

More complex

- Find any numeral followed by a space followed by a specified unit of measure (mg), then a space OR any specified punctuation. Replace the first space with a nonbreaking space.
  * Find what: **([0-9])( )(mg)([., ;:^13\)\/])**
  * Replace with: **\1^s\3\4**

Macros (summary tips only)

Start small

- Learn how to record small repetitive tasks (e.g. table header row formatting)

Find others (R&D)

- Google
- Acknowledge source in comment text

Test

- On **backup** copies of your documents first

Store together

- Put in a single file (e.g. *macros.dotm*) in STARTUP folder
(**C:\Users*username*\AppData\Roaming\Microsoft\Word\STARTUP**):
  - Available to all docs
  - Easy to transfer file to another computer
  - Preserved if *normal.dotm* gets corrupted and is rebuilt by Word

Automatic table of contents etc.

Use heading styles, auto captions, and Word functions to automate insertion of TOC, lists of figures/tables

References tab for insert and update options

TIP: Copyedit headings/captions via TOC etc. (often missed in main edit) – Ctrl+click page # in TOC to change

Select **Update entire table** option to update page numbers AND any text changes in headings/captions

Update TOC etc. as one of final steps

Quick parts

- **Insert ➔ Quick Parts** for insertion of:
  - Building blocks
  - AutoText
  - Fields
  - Doc properties
- Can create your own
- Tip: Add underscore in front of name to place yours at top of list

Quick parts: Example: Custom table

1. Create your table, applying styles, borders, shading, header row repeat, etc., but no text, unless you want it in every table!
2. Select your table.
3. On the **Insert** tab, click **Table**.
4. Click **Quick Tables**, then **Save Selection to Quick Tables Gallery**.
5. Complete the information on the **Create New Building Block** window:
   - Name: Tip: Add an underscore in front of the name to list it at the top
   - Gallery: Select **Tables**
   - Options: Select **Insert content in its own paragraph**.
6. Click **OK**.
7. You can now insert your custom table in your documents as often as you like:
   - Insert ➔ Table ➔ Quick Tables, then select your table; OR
   - Insert ➔ Quick Parts ➔ Building Blocks Organizer, sort by Category, select your table, and click **Insert**.

Quick parts: AutoText

❖ Ideal for long passages of often-used text; e.g.:

▪ Copyright and legal statements

▪ Safety warnings

▪ Notes

▪ 'About' info for a company

❖ Select the text, then **Insert ➔ Quick Parts ➔ AutoText ➔ Save selection to AutoText Gallery**

❖ To insert it later, **Insert ➔ Quick Parts ➔ AutoText**, then click the passage (even better, assign a shortcut key to it)

Quick Parts: Share your settings

❖ https://lawyerist.com/40659/sharing-autotext-and-quick-parts-with-others/

❖ http://gregmaxey.mvps.org/word_tip_pages/building_blocks_autotext.html (full discussion on Building Blocks, AutoText, etc.)

Other automation tools

Takeaways:

❑ Word doesn't have everything

❑ Use the best tools for your job

Other tools

❖ PerfectIt (http://www.intelligentediting.com)

❖ EditTools (http://www.wordsnsync.com)

❖ PhraseExpress (the power of auto correct for ALL your programs, not just Office programs; http://www.phraseexpress.com)

Helpful links/resources

- ❖ https://cybertext.wordpress.com/category/software/word/

- ❖ https://cybertext.wordpress.com/tag/keyboard-shortcuts/

- ❖ https://cybertext.wordpress.com/tag/macros/

- ❖ https://cybertext.wordpress.com/tag/find-and-replace/

- ❖ https://cybertext.wordpress.com/2011/03/08/word-use-the-power-of-autocorrect-to-save-heaps-of-time/

What now?

❖ Your task: Apply 2+ of these tips next week

❖ Which two will you try?

❖ This set of slides (but not the demos) are available on my website (http://cybertext.com.au/tips.htm) and SlideShare (http://www.slideshare.net/rbracey/presentations)

Thank you…

Any questions?

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