Taming Microsoft Word

Hot tips and cool tricks for business and technical documents

Jean Hollis Weber

How to become an instant expert on:

- Setting up Word 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
- Writing and editing HTML files in Word
- Creating PDF documents

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Hot tips and cool tricks for business and technical documents

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ISBN: 0 9578419 2 2

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About this book

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. (Woody Leonhard's books fit that category for me—see Appendix A for some titles.)

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.

Chapter 1 gives some hints on how to set up Word to work the way you prefer, including how to turn off some very annoying features.

Chapter 2 covers Word's editing and reviewing features.

Chapter 3 describes how to control some tricky aspects of page and table layouts.

Chapter 4 introduces templates and styles, some of Word's most powerful tools for producing consistent presentation in documents.

Chapter 5 describes how to use fields effectively to overcome numbering problems and control information that changes.

Chapter 6 summarizes some techniques for working with large or complex documents, including those divided into several files.

Chapter 7 gives some hints on working with graphics in Word, and editing HTML code using Word.

Chapter 8 goes beyond Word to the use of Adobe Acrobat to produce PDF files.

Appendix A lists the books and Web sites mentioned in this book, plus others.

Appendix B is a glossary of publishing and computing terms used in this book.

This book began as Chapters 3 and 4 in my 1999 book, *Electronic Editing*; that material has been expanded, corrected, and updated for this book.

— Jean Hollis Weber
Airlie Beach, Australia, February 2001

Technical notes

The full text of this book is available in four formats: PDF (Portable Document Format), WinHelp 4, HTML Help, and browser-independent Web pages. You can download any or all of these files through my Web site. A version containing all four formats may be available later on CD; check the Web site (http://www.wrevenge.com.au) for details.

The source files were created using Microsoft Word 97 running on Windows 98 SE. 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 Windows Paint. The PDF file was created using Adobe Acrobat 4.01, set for Acrobat 3 compatibility. The Help and Web files were created using ForeHelp Premier 2.96, a somewhat out-of-date version of an excellent help authoring tool, and tweaked using FAR and Dreamweaver 3.

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.

Acknowledgements

Thanks to all the people—too many to list individually—who contributed to my research for the book. Special thanks to Daniela Meleo for substantively editing the manuscript and making some pertinent suggestions on content and structure, and to Leanne Frahm for copy-editing. All remaining errors are my responsibility.

About the author

Jean Hollis Weber has a Master of Science degree in botany and 26 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 Web site (http://www.wrevenge.com.au) and publishes a fortnightly newsletter for editors.

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Chapter 1

Setting up Word to work your way

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 in Word 2000
- Turning off fast save and turning on backup copies
- Displaying paragraph marks, tabs, text boundaries, and other items
- Setting up editing and printing options
- Preparing for spelling and grammar checking
- Ensuring your user information is correct
- Controlling Word's AutoCorrect functions
- Adding a toolbar button for an easier-to-use style list (Word 97)
- Sharing documents with people using a different version of Word
- Installing more than one version of Word on the same computer

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

Tip If you use Word a lot, you'll want to learn some of the many keyboard shortcuts. Look for **Keys - shortcut keys** in the online help; you might want to print out a copy for reference.

Tip If you're using Word 97, make sure you have Service Release 2 (SR-2) for Microsoft Word or Microsoft Office. To check which version of Word you have: on the **Help** menu, click **About Microsoft Word**. If the first line in the About window does not say Microsoft® Word 97 SR-2, you need to upgrade.

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 it does, or banish it.

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**.

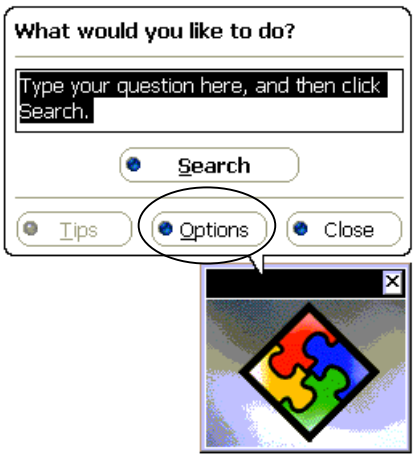

Figure 1. The Office Assistant

3. On the **Options** tab of the Office Assistant dialog (Figure 2), deselect all the checkboxes under **Show tips about** and **Other tip options**—especially the checkbox for **Using features more effectively**. You'll probably also want to deselect some of the checkboxes under **Assistant capabilities**, but leave **Respond to F1 key** selected.

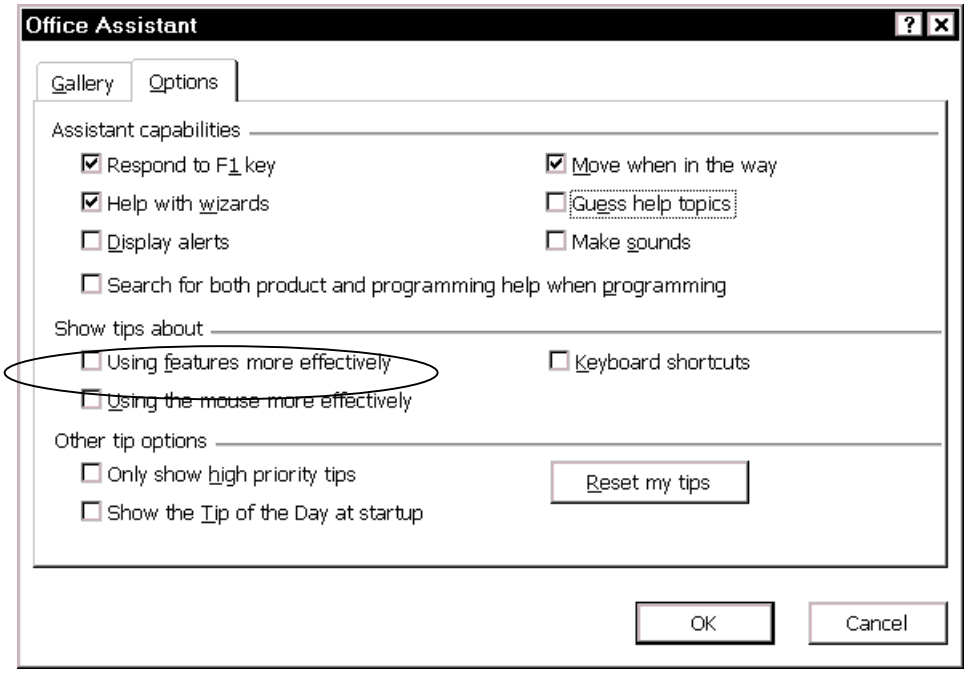

Figure 2. Choosing Office Assistant options

To banish the Office Assistant completely, click the **X** in the upper right-hand corner of the cartoon box (Figure 3) or right-click on the cartoon box and choose **Hide Assistant** from the pop-up menu.

Figure 3. Getting rid of the Office Assistant

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If you want to open the Office Assistant again, press **F1** (unless you disabled this in the Options dialog, or choose **Microsoft Word Help** from the **Help** menu, or click the **Help** button on the toolbar.

Disabling personalized menus in Word 2000

Word 2000's menus 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, turn it off.

1. On the **Tools** menu, click **Customize**. On the Customize dialog, choose the **Options** tab.
2. Clear the checkbox for **Menus show recently used commands first**.

Turning off fast save and turning on backup copies

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

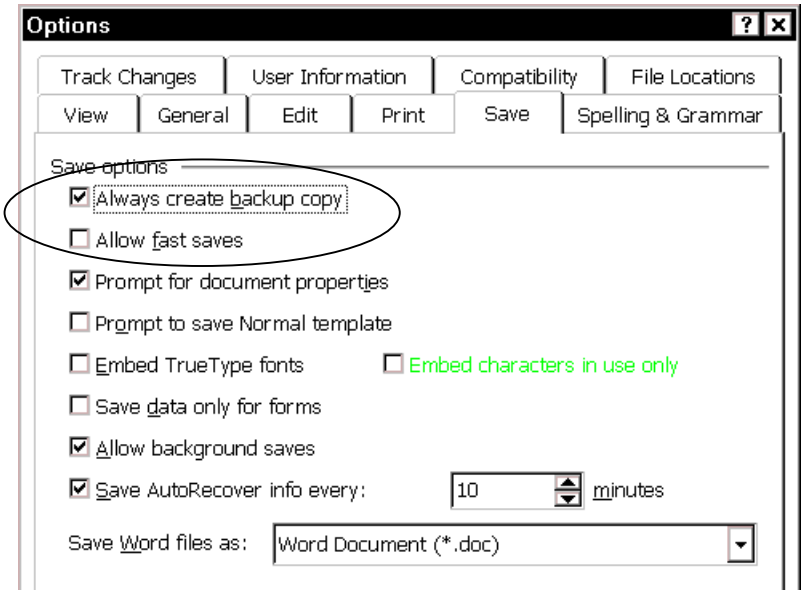

Figure 4. Choosing Save options

To turn off Fast Save:

1. On the **Tools** menu, click **Options**. On the Options dialog, choose the **Save** tab.
2. Deselect **Allow fast saves**, as shown in Figure 4. I recommend you select **Always create backup copy** unless you are very short of hard disk space.

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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. You need to know if, for example, 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.

On the **Tools** menu, click **Options**, choose the **View** tab, then select **Text boundaries** (in the Show group), **Tab characters** and **Paragraph marks** (both in the Nonprinting characters group), as shown in Figure 5.

You'll probably also want to select **Drawings** and **ScreenTips** in the Show group. During part of your work, you may want to select **Picture placeholders**, to speed up page loading (graphics will be represented by a blank box the size of the graphic).

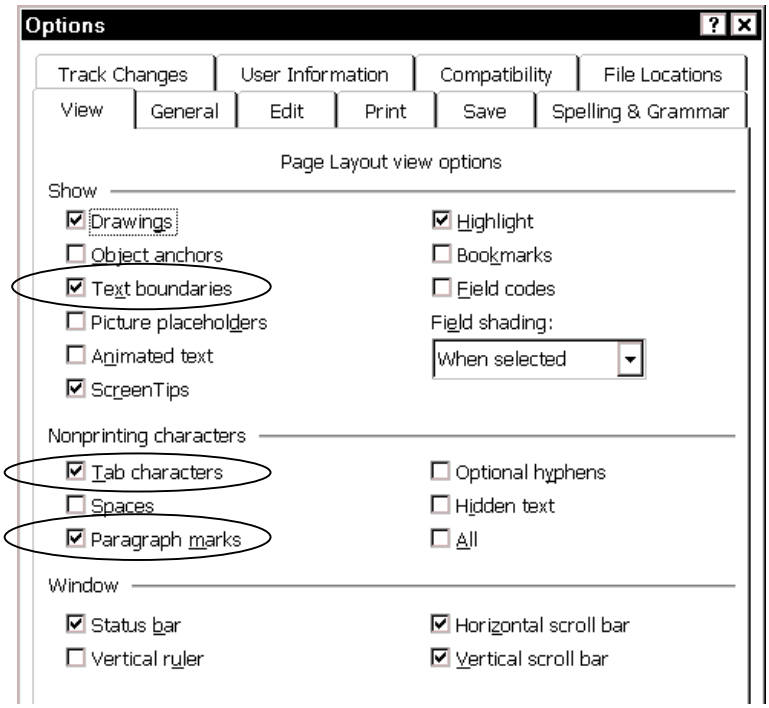

Figure 5. Choosing View options

Setting up editing and printing options

While you're in the Options dialog, choose the **Edit** tab (Figure 6) and choose the editing options that suit the way you work. One that I hate is **When selecting, automatically select entire word**, but you may find that feature very helpful. I like **Typing replaces selection**, but many people hate it.

Use smart cut and paste is another feature that you may love or hate. If you select this, Word adds or deletes spaces before and after text that you cut or paste. If the text includes complete words, phrases, or sentences, this is quite useful; you don't accidentally run two words together or leave a wider-than-usual gap between words. However, if the text isn't a complete word and should not have a space before and after it, you must manually delete the extra space.

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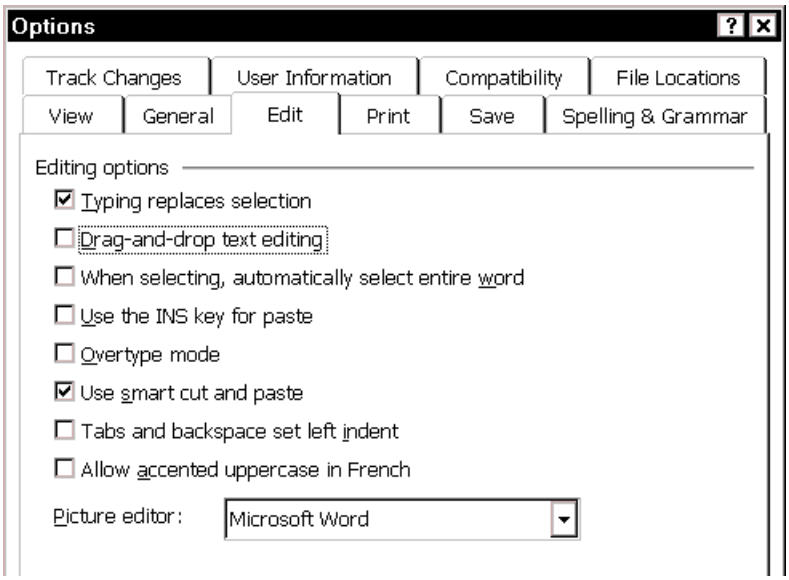

Figure 6. Choosing Edit options

On the **Print** tab (Figure 7), select **Update fields** and **Update links** (in the **Printing options** group), and **Drawing Objects** (in the **Include with document** group).

If you have problems with page numbering (especially if you need to use the "page x of y" fields), deselect **Background printing**.

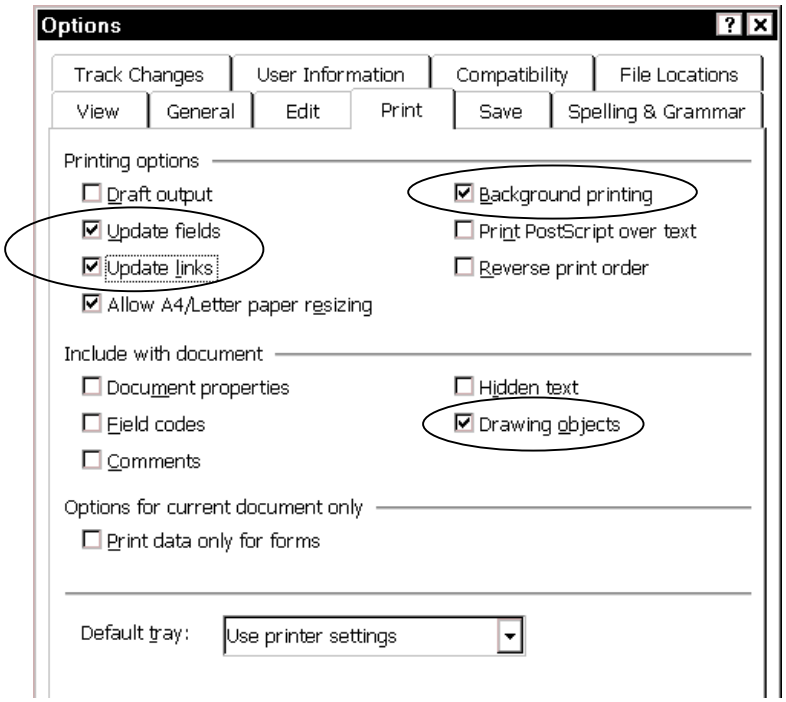

Figure 7. Choosing Print options

On the **General** tab (Figure 8), deselect **Update automatic links at Open**. If you edit documents that have links to spreadsheets or graphics, but you don't have the linked objects on your computer, you may find that the linked objects disappear from your copy of the file if you have this checkbox selected.

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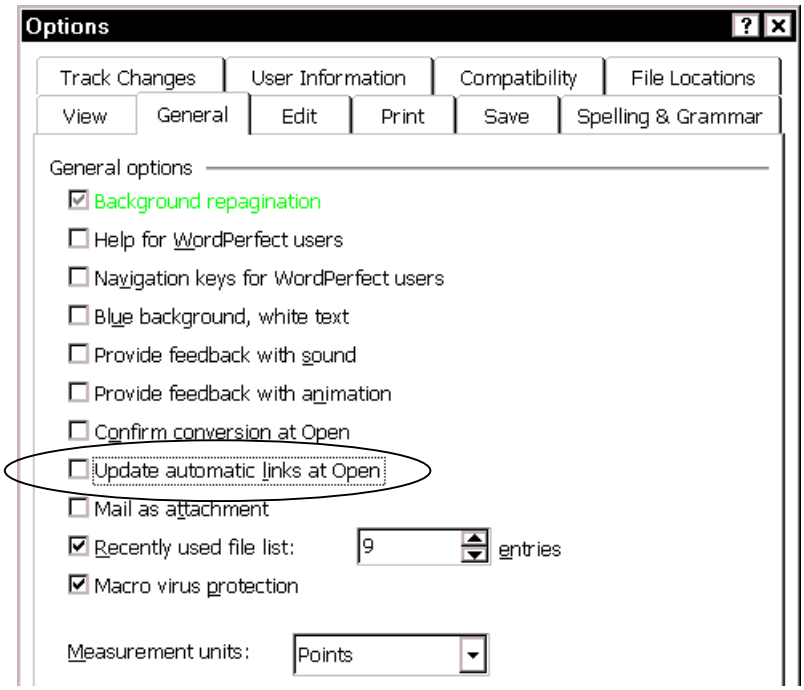

Figure 8. Choosing General options

Exception: If you're the last stop before printing a final copy of the document, you need to make sure you have those spreadsheets or graphics available—either on your computer, in the correct folder, or on a network to which your computer is connected; then you should select this checkbox to make sure the most up to date information is included.

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 of the Options dialog (Figure 9), choose settings that are useful for you.

Word 6/95	**Spelling** and **Grammar** are separate tabs of the Options dialog. On the **Grammar** tab, click **Customize Settings**.

In the **Spelling** section:

- I always deselect **Check spelling as you type** (even when writing) 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 would probably want to deselect **Ignore words in UPPERCASE** and **Ignore words with numbers**.
- I find **Ignore Internet and file addresses** useful, because so many of these are not used frequently enough to bother adding to a dictionary.

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- Here you can also check which custom dictionaries are active for this document, and add or remove dictionaries by clicking the **Dictionaries** button.

In the **Grammar** section:

- I deselect **Check grammar as you type** (even when writing).
- I deselect **Check grammar with spelling**.
- I select **Technical writing style** (unless I'm working with some other type of document), and click the **Settings** button to go to the **Grammar Settings** dialog.

On the **Grammar Settings** dialog (Figure 10), you can choose some useful settings and turn off any that annoy you. The items I find most useful are:

- **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.
- **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.

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 checked.

You can always change the options for a specific document by pressing **F7**, then choosing the **Options** button on the Spelling and Grammar dialog.

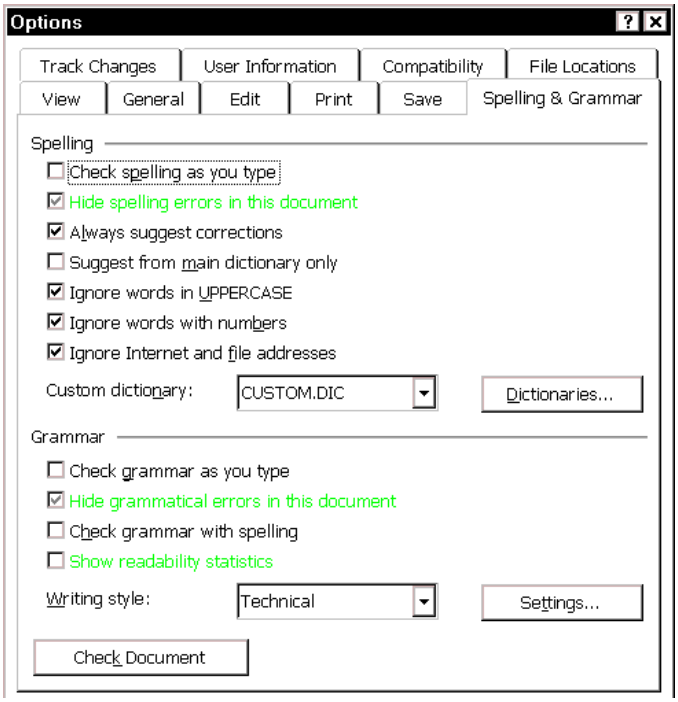

Figure 9. Choosing Spelling and Grammar options

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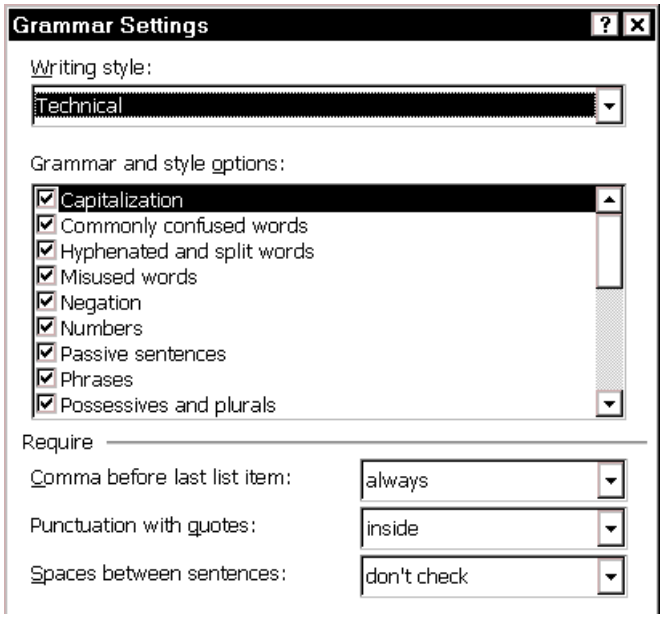

Figure 10. Choosing grammar settings

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 default to 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 document from one to the other, or clean up after contributors have re-used material that was originally written for the other version of English.

To change the default language for your system's spelling checker:

1. On the **Tools** menu, point to **Language**, then click **Set Language**.

Word 6/95	On the **Tools** menu, click **Language**.

2. On the Language dialog (Figure 11), highlight the required version of English on the list of languages.
3. Click the **Default** button.

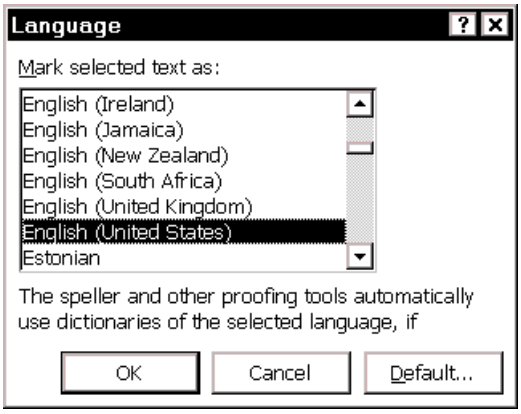

Figure 11. Choosing the required version of English

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To change the language for the current document only:

1. Select all the text (**CTRL+A**).
2. On the **Tools** menu, click **Language**, then **Set Language**.
3. On the Language dialog (Figure 11), highlight the required version of English on the list of languages.
4. Click **OK**.

Note: If you don't have a dictionary installed for the language you want (whether a version of English or some other language), then switching to a different language won't help; but most installations of an English-language version of Word should have at least the US and UK dictionaries installed.

Word 2000 The English language version of Office 2000 includes tools (spelling, grammar, hyphenation, thesaurus) for English, French and Spanish. Other languages are available on the Office 2000 Proofing Tools CD. (See your Office 2000 documentation for more information) With the correct language packs installed, Word will switch spelling and grammar checkers when you type in a different language. AutoCorrect now works correctly across multiple languages.

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 information about purchasing such supplemental dictionaries, contact your local Microsoft subsidiary or check Alki Software Corporation's Web site (see Appendix A).
- If the word is one that appears in several documents that you work with, 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, or because you have too many words to fit into one dictionary.

To select a custom dictionary to use with a document:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click **Dictionaries**.

Word 6/95 On the **Spelling** tab, click **Custom Dictionaries**.

3. In the Custom Dictionaries dialog (Figure 12), 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.
4. Click **OK**.

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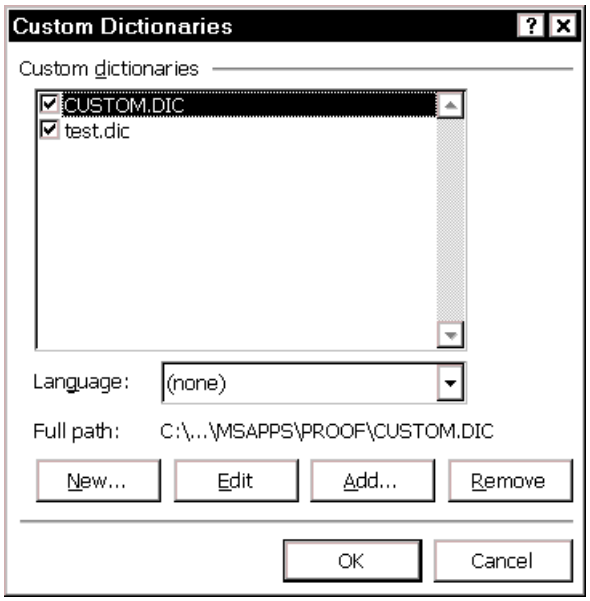

Figure 12. Activating a custom dictionary

If a custom dictionary you want to activate isn't in the Custom dictionaries box, but you know it exists, it is probably stored in a different folder from your proofing tools folder.

If you want to use a custom dictionary that's stored in any other location, you need to add the dictionary to the list in the Custom dictionaries box. To do this:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click the **Dictionaries** button.
3. On the Custom Dictionaries dialog, click **Add**.
4. 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**.
5. 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 **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click the **Dictionaries** button.
3. Click the **New** button.
4. On the Create Custom Dictionary dialog, type a name for your new dictionary, then click **OK**.
5. Back on the Custom Dictionaries dialog, make sure the checkbox for the added dictionary is selected, then click **OK**.

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

- Open the dictionary (click **Edit** on the Custom Dictionaries dialog, Figure 12) and type or paste the words, one to a line.
- While checking spelling, click **Add** on the Spelling and Grammar dialog (Figure 13) when a correctly spelled word is highlighted in the **Not in Dictionary** box.

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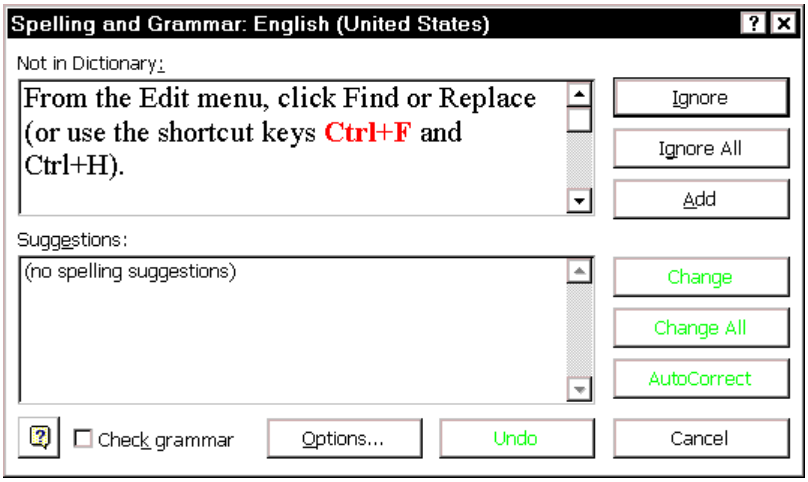

Figure 13. Adding a word to the dictionary while checking spelling

Ensuring your user information is correct

Because Word 97'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, click **Options** on the **Tools** menu and choose the **User Information** tab on the Options dialog. If anything on this page is incorrect, delete it and type the correct 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 **Tools** menu, click **AutoCorrect**. The AutoCorrect dialog (Figure 14) has four tabs:

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 15) 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.

I deselect all the items in the **Apply** (or **Apply as you type**) section, for example, because I don't want Word to automatically format my numbered or bulleted lists. I prefer to explicitly tell Word when to make something into a list item. 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 in Word 97" on page 54.)

Another choice that I usually disable is **Internet and network paths with hyperlinks**. Unless I plan to convert my document to a Web page, I don't want hyperlinks; I want plain text.

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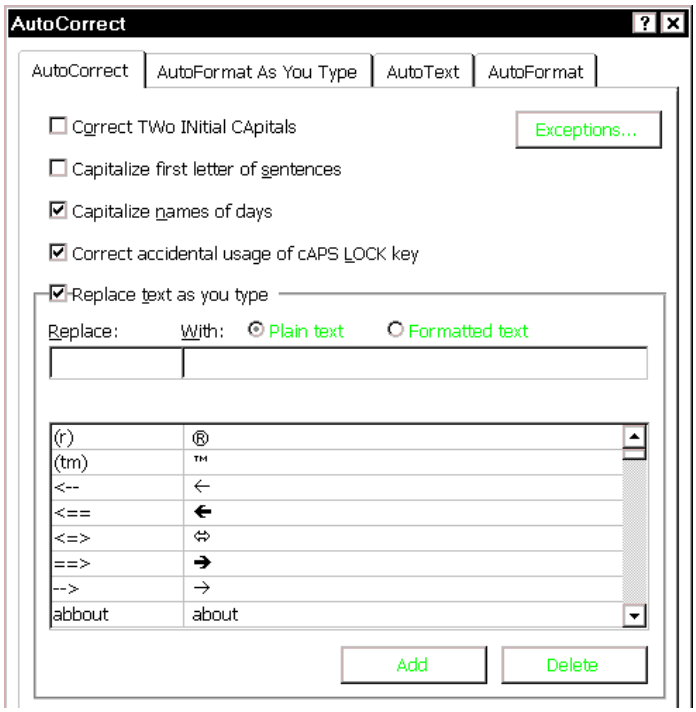

Figure 14. Choosing AutoCorrect options

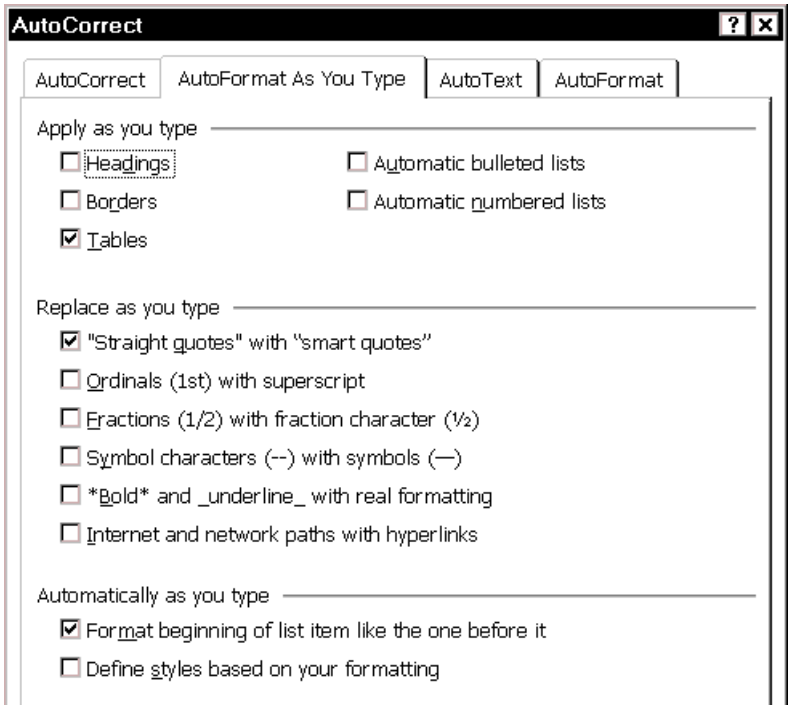

Figure 15. Choosing AutoFormat As You Type options

AutoText

The entries on the AutoText tab are very useful. See "Using AutoText fields to hold information that changes" on page 51 for more information.

Word 6/95 **AutoText** is a dialog of its own, reached from the **Edit** menu.

AutoFormat and **AutoFormat As You Type** are on a tab of the Options dialog, not on the AutoCorrect dialog.

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Adding a toolbar button for an easier-to-use style list (Word 97)

The style list provided with Word 97 shows what the fonts look like and gives some information about the styles. This list can be helpful, but if the writer has created custom styles, they don't appear in alphabetical order along with the supplied styles. Finding what you want can be frustrating. Users of earlier versions of Word will remember a different type of Style list and may want to have it back. Fortunately, you can add the old Style list to the menu bar (though you can't delete the new one, even if you want to).

1. On the **Tools** menu, click **Customize**.
2. On the Customize dialog, choose the **Commands** tab (Figure 16).
3. Make sure **Save in:** shows normal.dot. In the Categories list, click **Format**. In the Commands box, 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).
4. 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.
5. Click **Close** to close the Customize dialog.

Word 6/95	The easy-to-use Style list is standard in Word 6/95. No changes necessary!

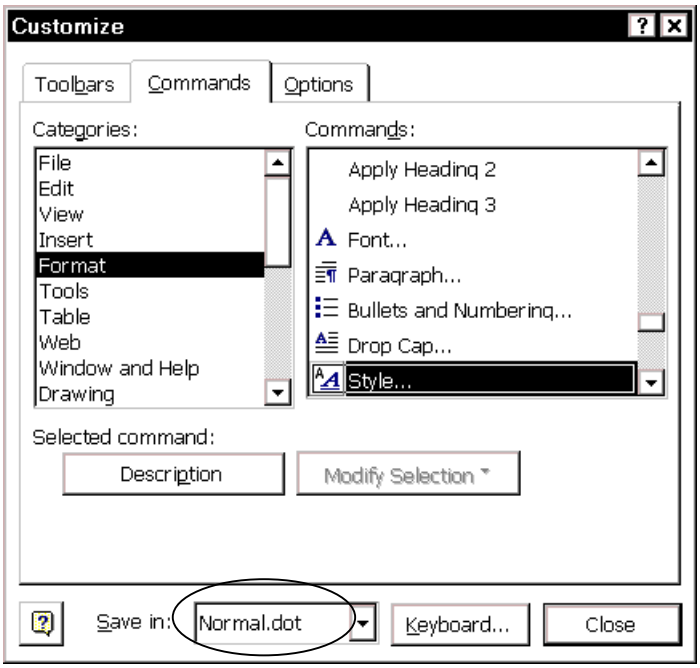

Figure 16. Choosing an easier-to-use style list

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.

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If anyone in your workgroup is using Word 6/95, everyone will need to be particularly careful. In addition to not using unsupported features, you have two choices for sharing files:

- Word 6/95 users can install an import filter so they can open and work on Word 97/2000 files, but they cannot save in Word 97/2000 format. You can get the filter from the Microsoft's Office Update Web site (see Appendix A).
- Word 97/2000 users can save documents in Word 6/95 format. Everyone can open and work on the files.

Tip To help you remember to save Word 97/2000 documents in Word 6/95 format, you can specify the default format in which to save documents. On the **Tools** menu, click **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 97 format, you will be prompted to save it in the format you selected.

Tip You can make Word 97/2000 behave like Word 95. On the **Tools** menu, click **Options**, then choose the **Compatibility** tab (Figure 17). In the **Recommended options for** box, choose Microsoft Word 6.0/95, then click OK.

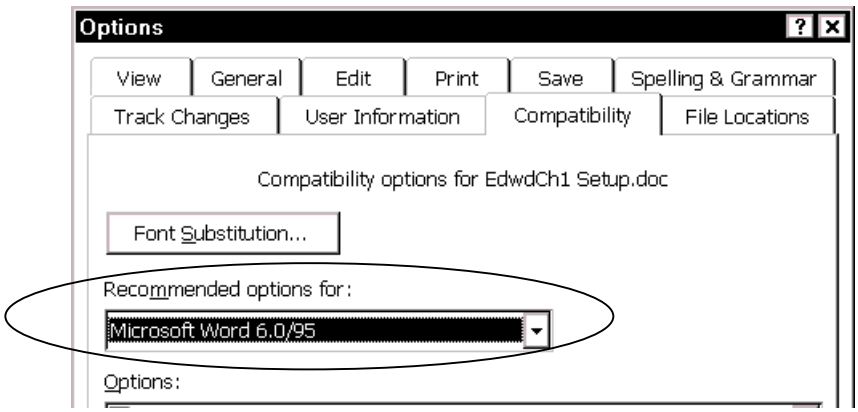

Figure 17. Setting up Word 97 to behave like Word 95

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. This works best if you install a new version of Office on a machine that already has an older version installed. Here's the secret:

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 the earlier versions of Office** on the computer.
4. Complete the rest of the installation.

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

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Chapter 2

Editing and reviewing documents

Word provides many ways for individuals and workgroups to edit, review, and comment on documents. This chapter covers some of the techniques, including some often overlooked features and problems.

- Checking spelling and grammar
- Finding and replacing text and formatting
- Marking and tracking changes
- Inserting comments and questions
- Changing document properties
- Accepting or rejecting editorial changes and comments
- Remove comments from a file
- Undoing edits
- Selecting a vertical block of text

Checking spelling and grammar

Although software won't find correctly spelled wrong words, the spelling checker can be useful for a first cut. It's also good for finding doubled words such as "the the".

"Preparing for spelling and grammar checking" on page 6 described how to set up Word. This section describes some features you might find useful:

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

Ignore some text while checking spelling and grammar

To mark some text (for example, code or e-mail addresses) to be ignored while checking spelling and grammar:

1. Select the relevant text.
2. On the **Tools** menu, point to **Language**, then click **Set Language**.
3. On the Language dialog (Figure 11 on page 8), highlight **(no proofing)** on the list of languages.
4. Click **OK**.

Tip For full paragraphs of text (such as code samples), define the language as "no proofing" in the style definition for those paragraphs. On the **Format** menu, click **Style**, select the style, then click **Modify**, **Format**, **Language**.

Recheck 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. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** dialog (Figure 13), click Options to display the Spelling and Grammar options dialog. Click **Recheck Document**.
3. At the message asking if you're sure you want to do this, click **OK**.

Finding and replacing text and formatting

Many people never learn how to use the advanced features of Find and Replace, but even the simplest search can make editing faster and easier.

1. On the **Edit** menu, click **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 specific formatting

One handy use for replacing formatting includes finding underlined words and replacing them with italics; I'm sure you can find many other uses.

On the Find and Replace dialog (Figure 18):

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.

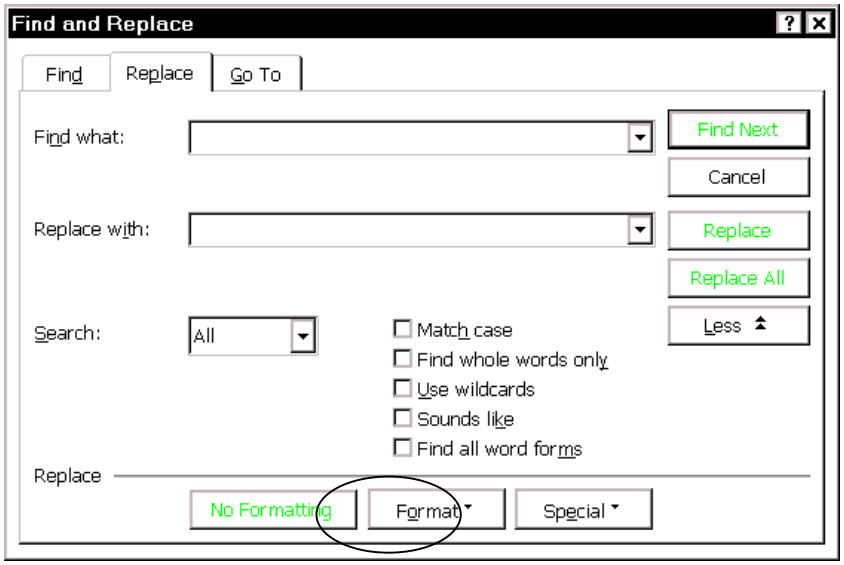

Figure 18. Finding and replacing specific formatting

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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**.

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

A common use for this function is to replace two paragraph marks with one, when a writer has pressed Enter twice between paragraphs (you, of course, are going to define a style that puts in any necessary extra space between paragraphs; see "Defining a new paragraph or character style" on page 43).

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**.

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

1. On the Find and Replace dialog (Figure 19), choose the **Go To** tab, then click the item you want in the **Go to what** box.

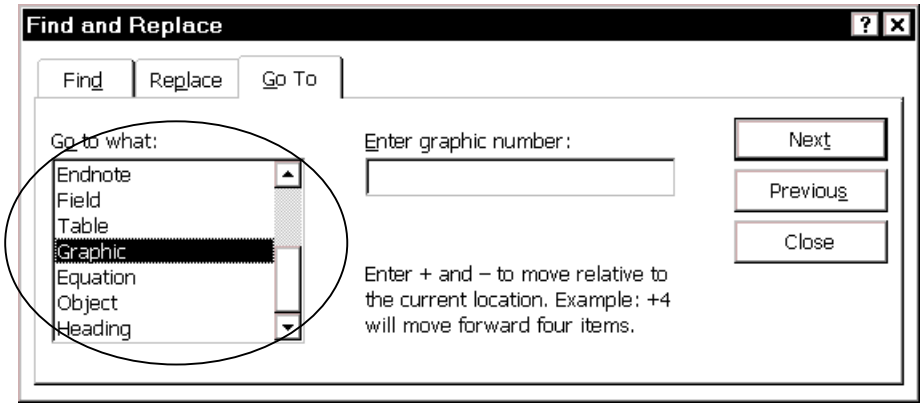

Figure 19. Finding items quickly using Go To

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.

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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 18), 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\?".

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Marking and tracking changes

If you need to keep a record of the changes you've made, you can use Word's revision marks to show where you want text, graphics, or formatting to be added, deleted, changed, or moved. Later, the writer (or the senior editor or another person) can review and accept or reject each change.

Another way to keep track of changes is for you to simply make your changes (after archiving the original document), then use Word to compare the two files and show the changes you made. On the **Tools** menu, point to **Track Changes**, then click **Compare Documents**.

A third way is to save versions, which are stored as part of the original file, but this can become a problem on documents of any size or complexity, especially if you save a lot of versions, because the file becomes quite large and Word slows down conspicuously. 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 use Word's revision feature to edit a document that has not been prepared for review, but you may want to ask the writer to do the preparation step before sending you the file. Again, using this technique is a matter of policy. The advantage is that the editor or reviewer can't forget to use revision marks. The disadvantage is if you change your mind about something you deleted, and you don't catch it soon enough to "undo" it, you have to type it in again, and it shows as both a deletion and an insertion. You'll have people being confused and asking "but what did you change?"

Prepare a document for editing

If you do need to prepare a document for editing, here's what to do:

1. Open the document.
2. Check whether the document contains multiple versions by clicking Versions on the File menu.

   If multiple versions exist, save the current version as a separate document with a different name, and use this copy as the review copy.
3. On the **Tools** menu, click **Protect Document**.
4. On the Protect Document dialog (Figure 20), select what you want the reviewers to be able to do.
   - To let reviewers change the document and insert comments, and to track all changes with revision marks, select **Tracked Changes**.

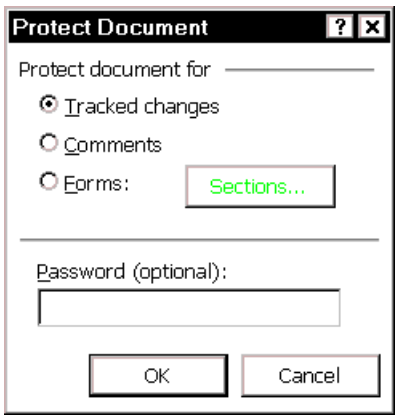

Figure 20. Setting up a document to ensure any changes are tracked

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- 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. To set up your reviewing options, on the **Tools** menu, point to **Track Changes**, then click **Highlight Changes**. Select the **Track changes while editing** checkbox (Figure 21).

   If you want to see your changes (not just the results of your changes) on screen, select the **Highlight changes on screen** checkbox.

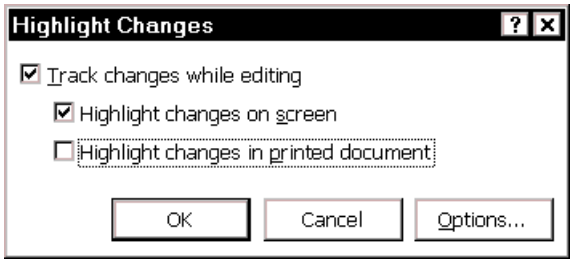

Figure 21. Specifying your reviewing options

2. To select which of your changes will be displayed, and how they will look, click **Options**. On the Track Changes dialog (Figure 22), you can choose colors and presentation (underline, strikethrough, italics, and so on) for inserted and deleted text, choose whether to show "change bars" in the margins (and if so, what character to use), and whether to mark formatting changes.

Word 6/95 tip	Display these selections by clicking **Revisions** on the Tools menu.

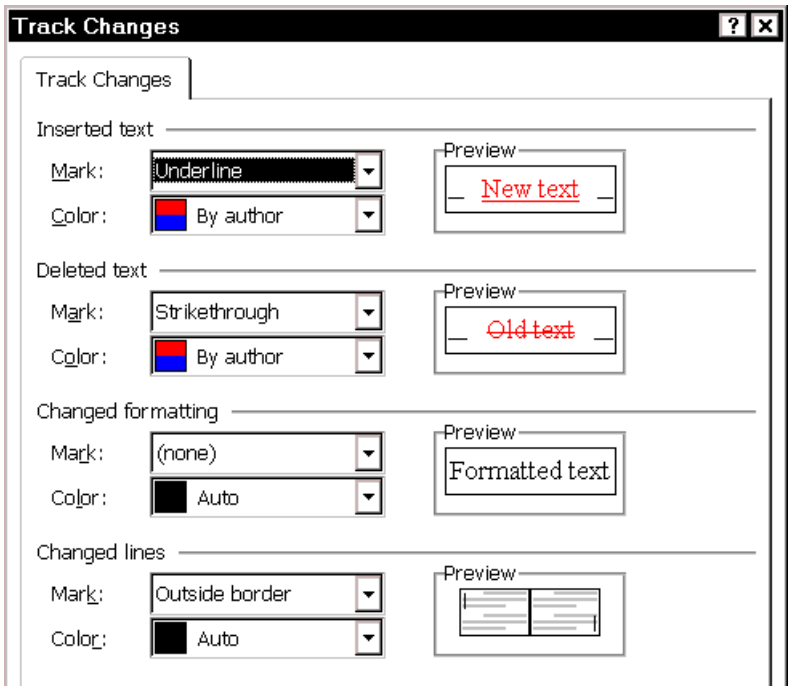

Figure 22. Choosing which of your changes will be displayed, and how they will look

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3. To display the Reviewing toolbar (not available in Word 6 or 95), open the View menu, click **Toolbars**, then click **Reviewing**.
   - 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 the Track Changes feature is turned on before you start editing. To turn on Track Changes, click the **Track Changes** button on the Reviewing toolbar.

Two things to remember:

1. Displaying changes (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 changes. To do this, go back into the Highlight Changes dialog (on the Tools menu, point to **Track Changes**, then click **Highlight Changes**) and deselect **Highlight changes on screen**.
2. If you're going to print the document, be sure **Highlight changes in printed document** is not selected (Figure 21), unless you want all the inserts and deletions to be printed.

Inserting comments and questions

When you insert a comment, Word numbers it and records it in a separate comment pane. You can view comments in ScreenTips or in the comment pane. You can also modify the comments you or others have made.

Word 6/95	Comments are called Annotations in Word 6/95. There is no Reviewing toolbar.

To insert a comment (annotation):

1. Select the text you want to comment on, or place the insertion point anywhere in the text.
2. On the Insert menu, click **Comment** (**Annotation** in Word 6/95), or press **Alt+Ctrl+M** on the keyboard, or (Word 97 only) click the **Insert Comment** button on the Reviewing toolbar. Your initials and a sequence number appear in the file, the comments pane opens at the bottom of the Word screen, and the spot where the comment was inserted is highlighted yellow.
3. Type your comment, then click **Close** to close the comments pane. (You can leave the comments pane open and click back in the main document to continue working; this can be faster if you're making a lot of comments.)

To edit a comment, move the mouse pointer over the comment marker until the pointer changes shape, then right-click and choose **Edit** from the popup menu (or click the **Edit Comment** button on the Reviewing toolbar) to display the comments pane.

To view a comment, you can either:

- Move the pointer over text shaded with light yellow. 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 **Options** on the Tools menu, click the **View** tab, and then select the **ScreenTips** checkbox.
- Click the **Edit Comment** button (on the Reviewing toolbar) to display the comments pane.

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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 **File** menu, click **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 49.

Accepting or rejecting editorial changes and comments

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

- Merge documents
- Incorporate reviewers' insertions and deletions
- Review changes by using the toolbar (Word 97 and Word 2000)
- Incorporate reviewers' suggestions made with comments
- Remove comments from a file

Merge documents

If more than one person reviews or edits separate copies of a document, the writer may wish to combine all of those comments and changes into one document. Word provides a way to do this, but it doesn't work quite as advertised.

Here's the theory:

1. Open the copy of the original document into which you want to merge changes.
2. On the **Tools** menu, click **Merge Documents**.
3. Locate and click one of the documents that has changes to be merged, and then click **Open**.
4. Repeat steps 2 and 3 until all copies of the document are merged.

Here's the problem:

Although insertions and deletions are marked correctly, using different colors for different reviewers, the comments don't merge correctly. Highlighting disappears and the comments (from reviewers after the first one merged) are duplicated in the comments pane.

Incorporate reviewers' insertions and deletions

You can review tracked changes in two ways:

- Using the Reviewing toolbar (not available on Word 6/95)
- Using the Accept or Reject Changes dialog

Review changes by using the toolbar (Word 97 and Word 2000)

Make sure changes are highlighted on the screen and the ScreenTips option is turned on (so you can see who made each change by resting the pointer over the highlighted revision).

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If revision marks don't appear in the document, point to **Track Changes** on the Tools menu, and then click **Highlight Changes**. Select the **Highlight changes on screen** checkbox.

If the reviewer information doesn't appear above the change when you rest the pointer over it, click **Options** on the **Tools** menu, choose the **View** tab, and then select the **ScreenTips** checkbox.

To...	Do this...
Review one change at a time	Click **Next Change** or **Previous Change** on the Reviewing toolbar.
Accept the change	Click **Accept Change**
Reject the change	Click **Reject Change**
Accept or reject all changes in one pass	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Accept All** or **Reject All**. If you change your mind, you can click **Undo**.
See how the document would look if you accepted all changes	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Changes**, without highlighting.
Display the original, unchanged document so you can see how the document would look if you rejected all changes	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Original**. However, if the document contains formatting changes, Word displays the changed formatting, not the original formatting.

Incorporate reviewers' suggestions made with comments

1. On the Reviewing toolbar, click **Edit Comment**.
2. In the comment pane, select and copy the comment text or item.
3. Paste the text or item in the document where you want it to appear.

If you want to see only those comments from a particular reviewer:

1. Open the Comments pane, then click on the down-arrow next to the **Comments From** box.
2. Choose the name you want from the list. Comments by the other reviewers are not displayed until you choose another name (or **All Reviewers**) from the list.

Remove comments from a file

After dealing with editorial comments, and before the document is finalized, the writer should remove the comments. Unfortunately Word does not have a quick and easy way to remove all comments with one command, although you can record a macro to do the work.

To remove comments:

1. Make sure Track Changes is turned off.
2. Rest the pointer over the highlighted text of the first comment.
3. When the ScreenTip appears, press the **Delete** key on the keyboard.
4. Click the **Next Comment** button on the Reviewing toolbar to move to the next comment.
5. Repeat steps 2 and 3 until all comments have been deleted.

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Undoing edits

Most people know that 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.

Many people don't realize that 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. 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.

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Chapter 3

Controlling page layout

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
- Editing footnotes and endnotes
- Changing table layouts
- Putting portrait headers on landscape pages

Changing page layouts

To change paper size, margins, and some aspects of layout, on the **File** menu, click **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

If you want to have different settings for different parts of a document (for example, some portrait pages and some landscape pages, or single column and double column layouts), you need to have the different parts in different sections. You can do this in two ways:

- On the **Layout** tab of the Page Setup dialog (Figure 23), 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.

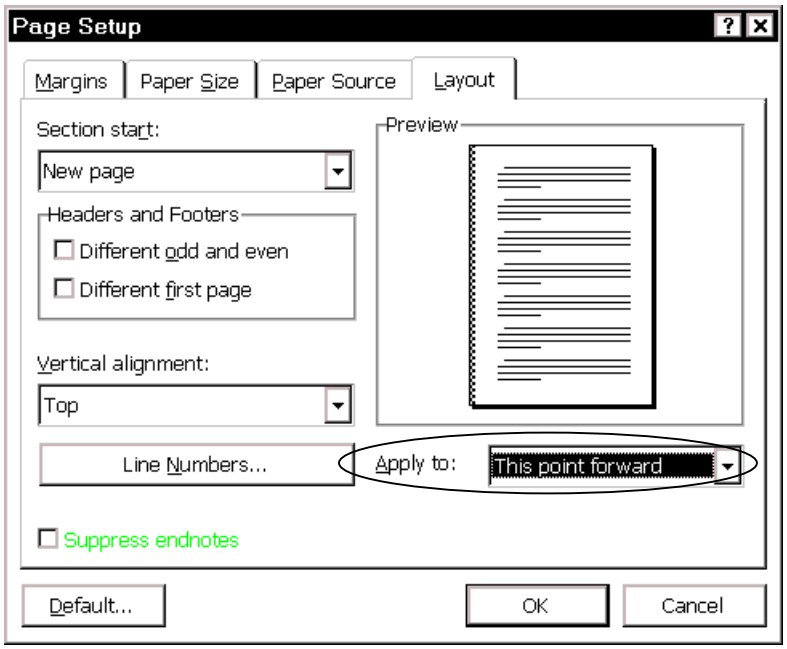

Figure 23. Starting a new section using the Page Setup dialog

- Insert the section breaks in the file (on the **Insert** menu, click **Break** and choose the required type of section break on the Break dialog (Figure 24), 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.

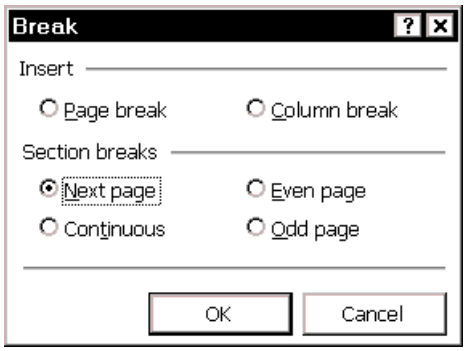

Figure 24. Starting a new section using the Break dialog

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Change page margins

Page margins are the area between the edge of the paper (defined on the Paper Size 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 **File** menu, click **Page Setup**, make sure the correct paper size is selected on the **Paper Size** tab, then choose the **Margins** tab (Figure 25).

   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.

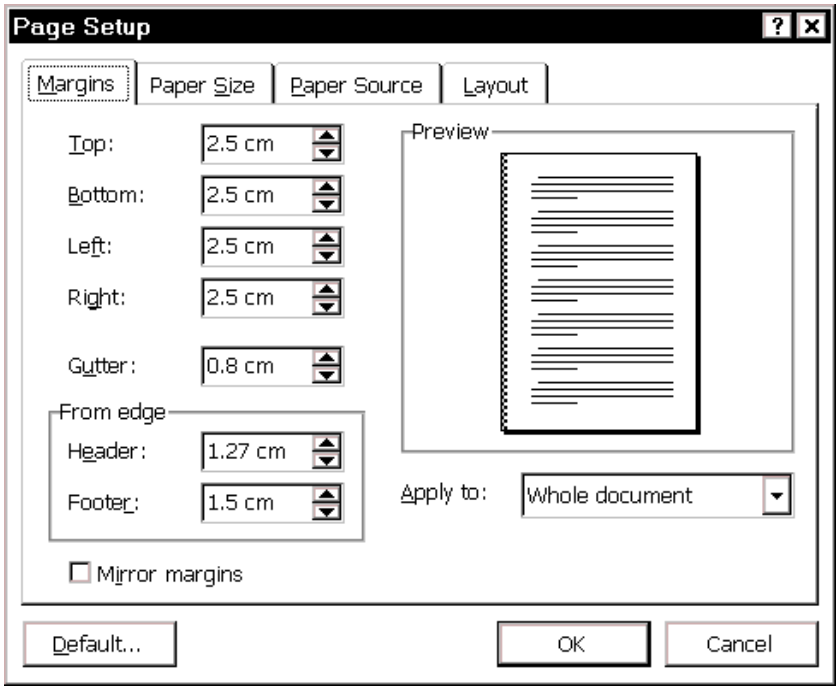

Figure 25. Changing page margins

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".

   Note: If you start a new section on the same page as a previous section, this technique won't work, because page margins apply to a whole page. You can create the same effect 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 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.)

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Editing headers and footers

To edit headers and footers: on the **View** menu, click **Header and Footer**, or simply 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 **File** menu, click **Page Setup**. (Or click the **Page Setup** icon on the Header and Footer toolbar.)
2. On the **Layout** tab of Page Setup dialog (Figure 26), 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**.

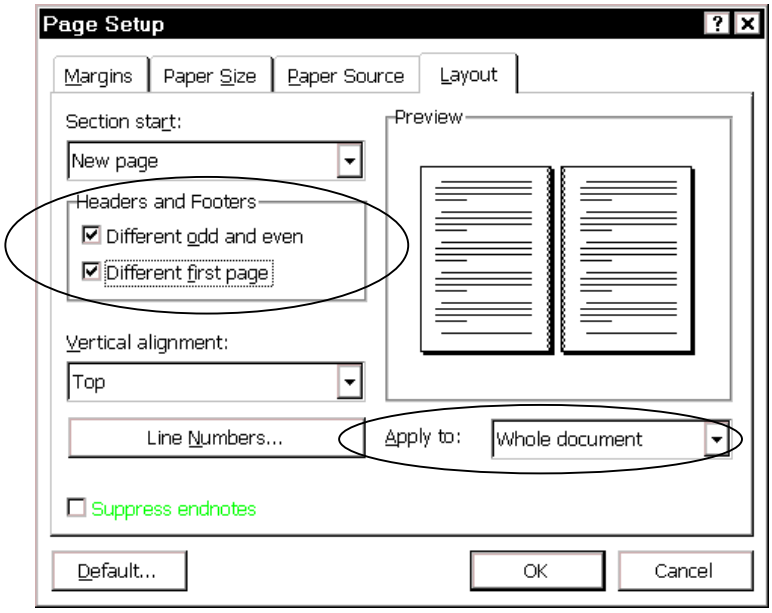

Figure 26. Specifying different headers and footers for first, odd and even pages

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 62.

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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Editing footnotes and endnotes

You can edit footnotes and endnotes in Word without doing anything special.

However, if you want to delete a footnote completely, be sure to delete the footnote marker (number or symbol) in the body of the document, not the footnote text, or you will still have the footnote marker in the document body, and the line at the bottom of the page, but no footnote text. When you delete the marker, the footnote text is automatically deleted as well.

For more information on footnotes and endnotes, check the online help.

A handy trick for editors: If you want to change the footnote markers (for example, from a number series to a series of symbols):

1. On the **Insert** menu, click **Footnote**. On the Footnote and Endnote dialog (Figure 27), click **Options**.

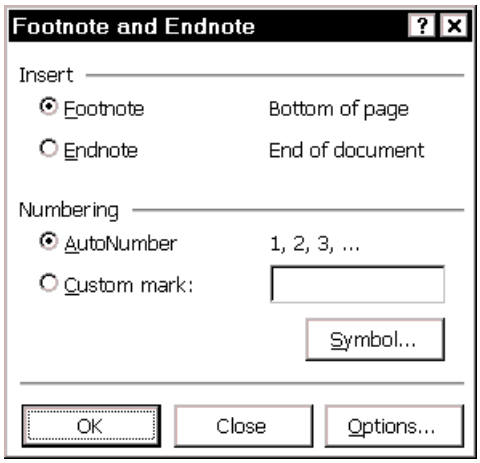

Figure 27. Using the Footnote and Endnote dialog

2. On the Note Options dialog (Figure 28),where your choice affects all footnotes in the document, choose the number format you want, then click **OK**.

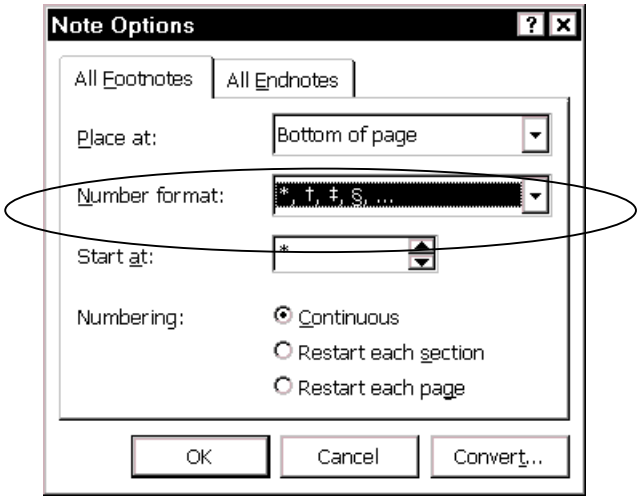

Figure 28. Changing the number format for footnotes

3. Back on the Footnote and Endnote dialog (Figure 27), click **Close**. The number format will change for all existing footnotes, but you won't insert a new footnote. (If you clicked **OK** here, you would also insert a new footnote.)

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Change footnotes to endnotes

1. On the **Insert** menu, click **Footnote**, then click the **Options** button.
2. On the Note Options dialog (Figure 28), click **Convert**.
3. On the Convert Notes dialog (Figure 29), select the option you want, then click **OK**. (If you only have footnotes or endnotes, but not both, only one choice will be active.)

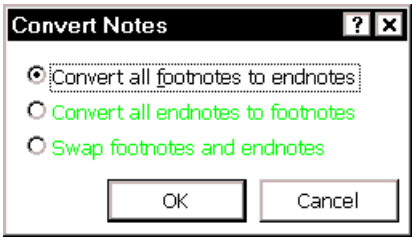

Figure 29. Changing footnotes to endnotes

Changing table layouts

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 spreadsheet)
- To line up material that might otherwise be lined up using tabs
- To position various page elements in columns, or line up graphics in the margin with text in indented paragraphs

In each case, you may need to change what Word has produced. For example:

- Word's default table layout is page width, with the columns in the table of equal width. You may need to adjust these to the best fit for the data in the columns.
- Some tables may extend into one or both margins. This often happens when the data has been imported from another program.
- The style guide for the document may prescribe a table layout style that has not been applied consistently.

This section provides some tips for changing table layouts quickly:

- Fit a table to the page margins
- Adjust column widths
- Adjust row heights
- Remove vertical or horizontal gridlines
- Change tabbed text into a table

Fit a table to the page margins

When fitting a too-wide (or too-narrow) table to the page width:

1. Decide whether you want the columns in the table to be of equal width, or you want to adjust the columns to better fit the data.
2. Select the entire table (place the insertion point anywhere in the table; on the **Table** menu, click **Select Table**—or use the keyboard shortcut **ALT+5** on the numeric keypad (with NumLock off).

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3. On the **Table** menu, click **Cell Height and Width**.
4. In the Cell Height and Width dialog (Figure 30), select the **Column** tab.
5. Do one of the following:

   To make all columns equal width:

   a. In the **Width of column** box, type **A** and click on the down arrow so the box shows **Auto**.

   b. If you wish to change the **Space Between Columns**, you can do so now.

   c. Click **OK**.

   To make columns fit the data:

   a. Leave the **Width of column** box blank. You can change the **Space between columns** if you wish.

   b. Click **AutoFit**.

   c. You'll probably want to adjust some of the column widths after doing this.

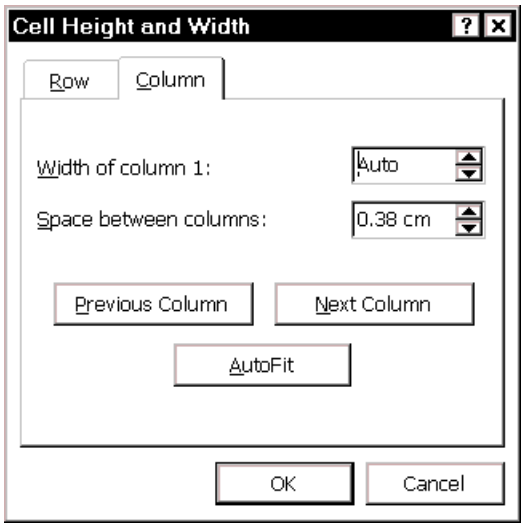

Figure 30. Specifying the size of a column in a table

Adjust column widths

You can adjust the width of individual columns in several ways:

- Using the **Distribute Columns Evenly** choice on the **Table** menu, if you want all the columns to be the same width
- Using the **Cell Height and Width** dialog
- Using the mouse to drag column margins

To use the Cell Height and Width dialog:

1. Select the column you want to adjust, not the entire table. To do this, position the pointer just above the top of the column you want to adjust; the pointer will turn into a down-arrow (🡻). Click to select (highlight) the column.
2. On the **Table** menu, click **Cell Height and Width**.
3. Adjust the **Width of column** as required. You can also change the **Space between columns** if you wish.

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4. If you want to change the width of another column, click the **Next Column** or **Previous Column** button until the required column is displayed.
5. Repeat steps 3 and 4 until you have finished adjusting column widths.
6. Click **OK**.

To use the mouse to drag column margins:

1. Display the horizontal ruler, if it is not already visible at the top of the document.
2. Select the table.
3. Position the pointer over one of the markers on the ruler, until the pointer turns into a double-headed arrow (↔). Hold down the left mouse button and drag the marker to the required location. All cells to the right resize proportionally.

   To resize only the first cell to the right, hold down the **Shift** key while you drag the marker.

   To make all cells to the right resize to an equal width, hold down the **CTRL** key while you drag the marker.

Note: This technique moves column margins in increments defined by the setting for drawing gridlines. If you need a finer adjustment, you can either change the gridlines setting or use the Cell Height and Width dialog.

To change the gridlines setting:

1. Display the Drawing toolbar.
2. On the Drawing toolbar, click **Draw**, then click **Grid**.
3. On the Snap to Grid dialog (Figure 31), you can deselect the **Snap to grid** checkbox, or change the horizontal spacing.

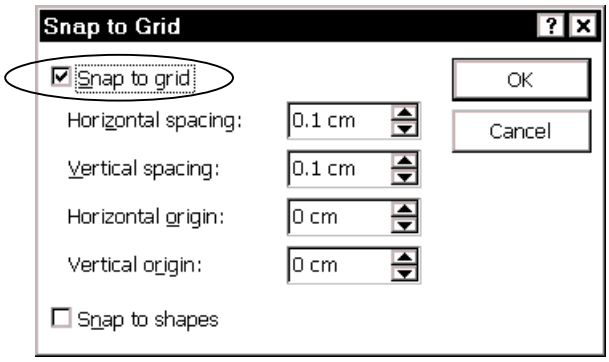

Figure 31. Specifying the grid spacing for tables and drawings

Remember that anything you change here will not affect existing tables or drawings, but it will affect anything using gridlines that you create or adjust in the future, so you may want to return to this box and change the settings back after you've finished fixing the tables.

Adjust row heights

You can adjust the height of the row in several ways:

- Using the Cell Height and Width dialog
- Using the mouse to drag the row height up or down
- Using paragraph styles to adjust the space before and after the text in the row

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The first two methods can increase the space after the text, but won't affect the space before.

If you need to adjust the space before as well as after the text in a row, use paragraph styles (see "Defining a new paragraph or character style" on page 43 for more information).

Remove vertical or horizontal gridlines

By default, Word creates tables with visible horizontal and vertical gridlines. In some cases (for example, spreadsheet-like tables), this may be what you want. In other cases, you may want only vertical lines, or only horizontal lines, or no lines at all.

I haven't found any way to make a different table layout the default. When I'm creating a table with no data (intending to type the data in afterwards), I copy a blank, formatted table from my collection of stock tables. When I'm editing an existing table, or creating a table out of existing text, or importing a table from a spreadsheet, then I have to apply the required table formatting afterwards. Fortunately, this isn't difficult, though if you have a lot of tables, it can be time-consuming.

To remove all gridlines from a table:

1. Select the table.
2. On the **Table** menu, click **Table AutoFormat**.
3. On the Table AutoFormat dialog (Figure 32), choose **(none)** in the **Formats** list and click **OK**.

To remove vertical gridlines and keep the horizontals, follow the procedure above, but choose one of the other AutoFormats. I find **List 3**, with the **Color** checkbox deselected, useful.

To remove horizontal gridlines and keep the verticals, you'll need to use **Borders and Shading** on the **Format** menu. Start with an AutoFormat that's close to what you want and amend it. This can get a bit complicated, so I won't go into the details here.

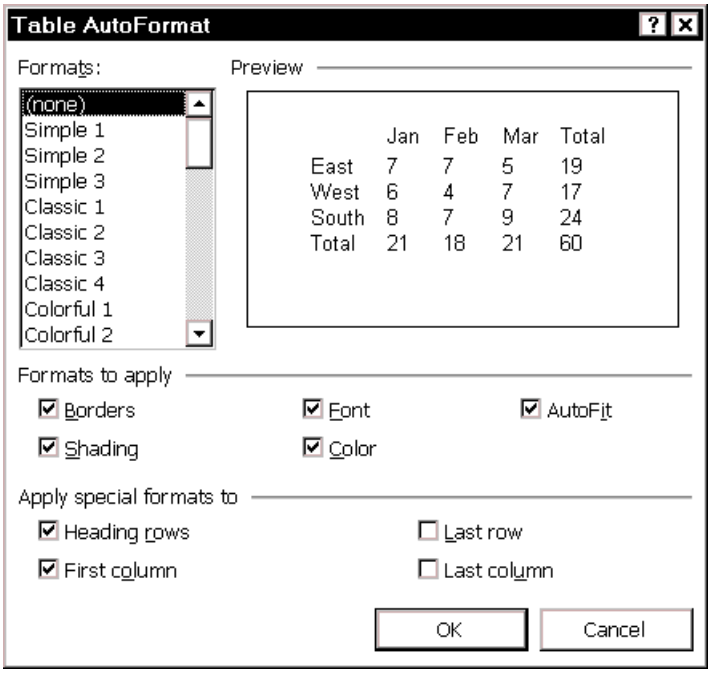

Figure 32. Removing all gridlines (cell borders) from a table

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Tip When you create a new table, you can remove all the borders this way: before you do anything else (including entering text into the table), press **CTRL+ALT+U**. This trick can be very useful when you're using a table for page layout.

Change tabbed text into a table

If a writer has used tabs to put text into columns, and particularly if some lines have more than one tab between columns (because the writer 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 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 4).
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 16).
3. Select all the tabbed text, including the paragraph markers.
4. On the **Table** menu, click **Convert Text to Table**.
5. On the Convert Text to Table dialog (Figure 33), select **Tabs** in the **Separate Text At** group.

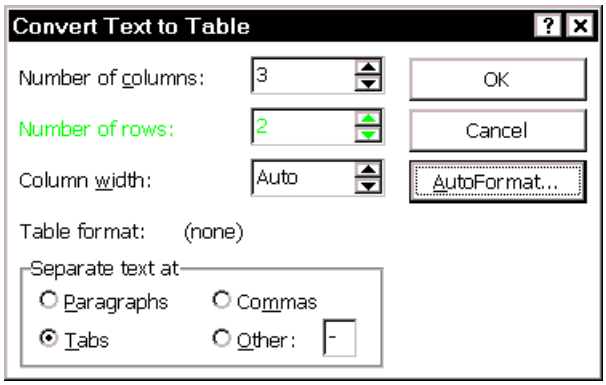

Figure 33. Converting selected text to a table

6. Click **AutoFormat**. On the Table AutoFormat dialog (Figure 32), choose whatever you want in the Formats box, then click **OK**.
7. Back on the Convert Text to Table dialog, click **OK**.

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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 you want the headers of all the pages to print on the short side of the paper (the “top” as you’re looking at the sheet of paper), follow these instructions (this is actually 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 **Paper Size** tab (Figure 34), select **Landscape** orientation. Make sure the **Apply to** box shows **This section**, then click **OK**.
3. On the **View** menu, click **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.

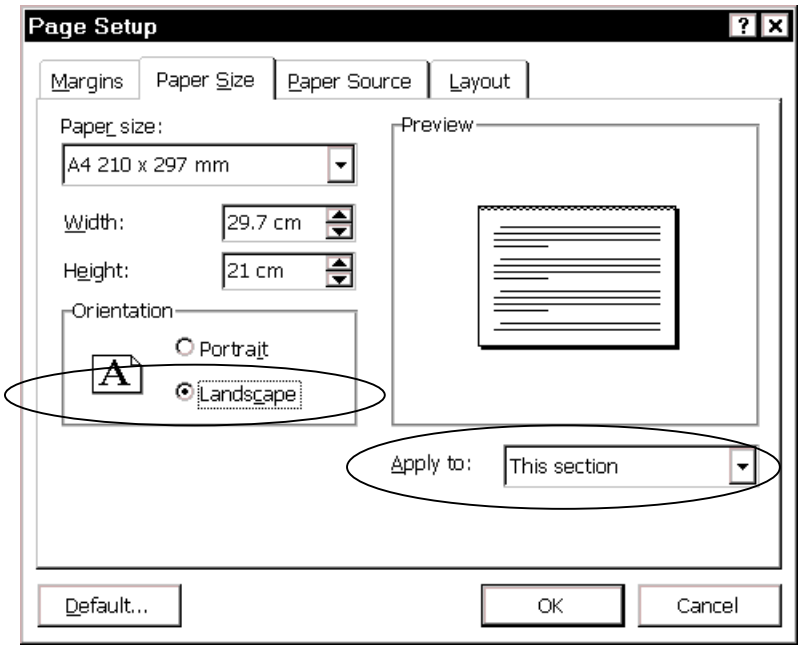

Figure 34. Selecting landscape orientation for this section

6. Position the insertion point in the header of the landscape section (along the long side of the page), as shown in Figure 35. On the **Insert** menu, click **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.
7. On the **Format** menu, click **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.

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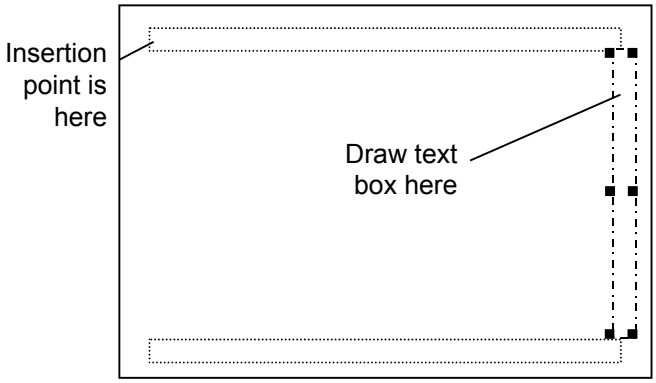

Figure 35. Drawing a text box to hold a portrait header on a landscape page

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.

Word 6/95 This technique does not work, unless you use WordArt to rotate the text in the text box. You insert a text box from the **Drawing** toolbar, not the **Format** menu.

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Chapter 4

Using templates and styles effectively

Every Word document is based on a **template**, which specifies the layout and styles used in the document. (Templates can also contain custom toolbars, macros, AutoText entries, the contents of headers and footers, standard “boilerplate” text and graphics, and more. Some templates are effectively fill-in-the-blanks forms.)

A **style** is a collection of formatting specifications that is given a name. Word supports both **character** styles (typeface, font size, bold, italic, superscript, among others) and **paragraph** styles (line spacing, space before and after, first line indent, and so on, plus a character style for the paragraph). You can apply a character style to parts of a paragraph.

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 template.

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, quite often this results in a mess. Cleaning up the mess can be quite time-consuming; avoiding it is a far better strategy.

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

- Understanding template hierarchies
- Determining what templates are attached to a document
- Changing the information in a template
- Copying information between templates
- Applying a different template
- Sharing templates with others in your workgroup
- Changing a paragraph or character style
- Defining a new paragraph or character style
- Speeding up style selection
- Removing unwanted and unused styles from a document
- Printing a style sheet

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Understanding template hierarchies

Word lets you use more than one template with a document. For example, you can store personal customizations of Word (such as toolbars) in one template, project-specific or workgroup information in a second template, and document-specific information in a third. And every Word document automatically uses the so-called Normal template.

Word uses this sequence to determine which template's settings take priority:

1. The attached template (the one on which the current document is based), if there is one. Settings defined here take precedence over those in other active templates. You can change this template by attaching a different template.
2. The Normal template, which is a global template that is associated with every document you open.
3. Any other global templates. Any settings they contain that don't conflict with those in the attached or Normal templates are available. If two or more global templates are used, Word prioritizes them alphabetically.

Problems can arise when you and others don't have the same templates available, or when everyone is working with copies of the same templates but individuals have changed something (such as a paragraph style definition) so the copies are no longer identical. See also "Changing the information in a template" on page 39.

Determining what templates are attached to a document

1. On the **Tools** menu, click **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 36).

Word 6/95 tip	On the **File** menu, click **Templates**.

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 the individual documents can be modified (that is, company policy allows modification), 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 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 do want changes to the template to apply to existing documents. In this case, make sure the 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.)

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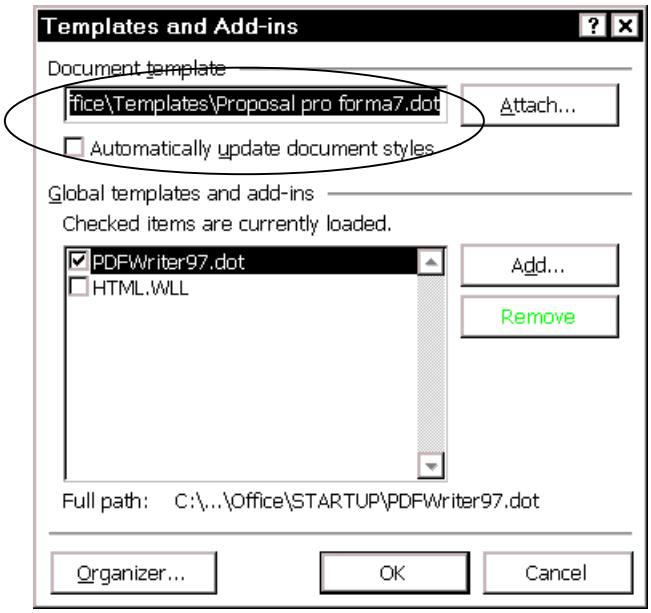

Figure 36. Determining the attached template

Changing the information in a template

The usual changes that writers and editors make to a 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 a template in two ways:

- Open the template itself in Word, make changes to 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 38).

But what happens if you don't have access to the template on which the document is based? The changes don't get stored in the document template; they get stored in the document itself. Then when you send the document back to the writer, 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.

Copying information between templates

If you have customizations or other information in one template that you want to use in another template, you can copy it quickly and easily using the Organizer (Figure 37).

1. On the **Tools** menu, click **Templates and Add-ins**, then click the **Organizer** button, as shown in Figure 36.

   In the Organizer dialog (Figure 37), 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.

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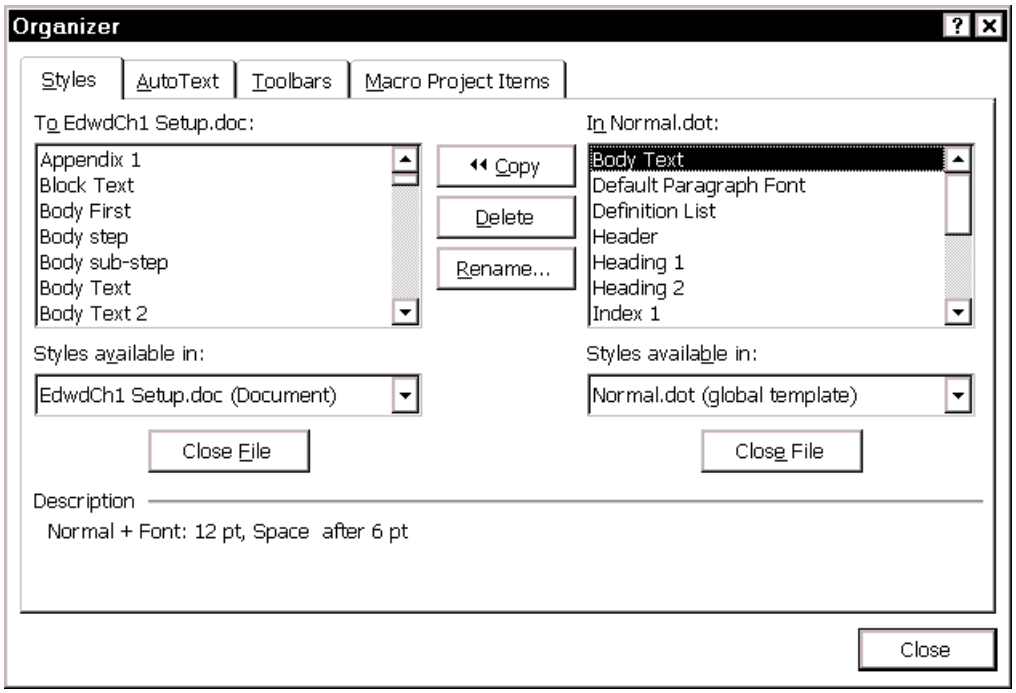

Figure 37. Use the Organizer to copy information into a new template

2. 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 located between the two columns. You can highlight and copy more than one style at a time. You can also copy AutoText, toolbar, and macro customizations to a new template using the Organizer; click on the relevant tab.
3. When you have finished, click **Close**.

Applying a different template

To apply a different template to an existing document:

1. On the **Tools** menu, click **Templates and Add-Ins**.
2. In the Templates and Add-ins dialog (Figure 36), click **Attach**.
3. Select the required template file, 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**.

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 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 "Removing unwanted and unused styles from a document" on page 47.

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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 consult a good, in-depth book or get someone knowledgeable to teach you—and do a lot of practicing.

Sharing templates with others in your workgroup

Make sure any templates used in shared documents are available to all members of your workgroup. If everyone does not have access to the same shared drives, each person may need to keep a copy of the template 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.

Word stores templates in a specified folder, unless you tell it to put them somewhere else. You can store a project 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 still find it.

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

1. On the **Tools** menu, click **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 36).
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.

Changing a paragraph or character style

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.

To redefine an existing style:

1. On the **Format** menu, click **Style**, choose the style you want to change, then click **Modify**.
2. On the Modify style dialog (Figure 38), 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.

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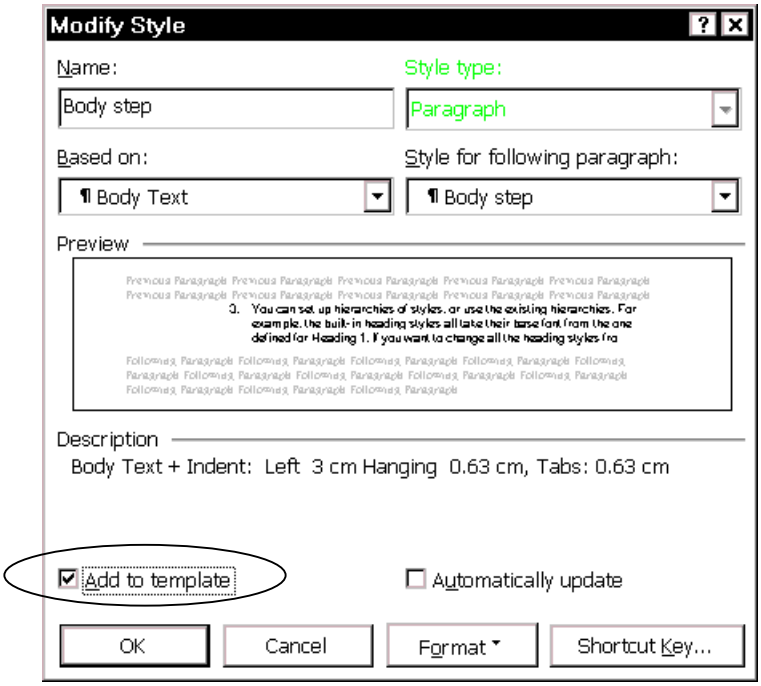

Figure 38. Changing an existing style and storing it in the template

Notes:

1. As discussed in “Changing the information in a template” on page 39, 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. In many templates, most of the paragraph styles are based on the Normal paragraph style. Unless the other paragraph styles have been defined with different attributes (font typeface and size, paragraph spacing, and so on), they take those attributes from the Normal style. Therefore, if you want to change the basic text font (say, from Times New Roman to Palatino), or the basic paragraph spacing, or other attributes, you could simply change the Normal style.
3. 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.

As with templates, there’s a lot more to styles than I can cover in this chapter. For a more in-depth knowledge of styles, you’ll need a good book or a style expert to assist you.

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Defining a new paragraph or character style

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

1. On the **Format** menu, click **Style**, then click **New**.
2. In the New Style dialog (Figure 39), 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.

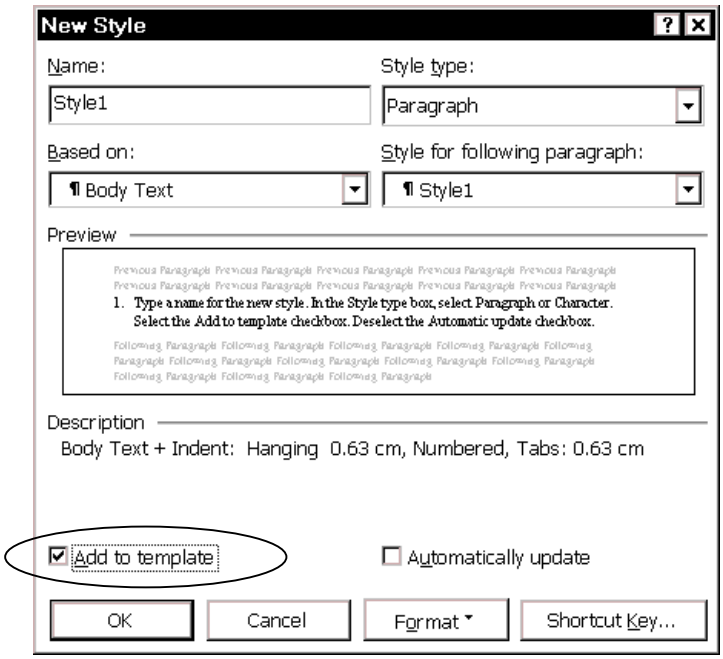

Figure 39. Adding a new style to a template

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 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 “Changing the information in a template” on page 39, 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.

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Speeding up style selection

When you're writing, editing, or reformatting a document, you'll want to speed up the process of assigning styles to paragraphs and characters.

Instead of selecting text, then moving to the style list and clicking on a style, you can assign frequently used styles to keyboard shortcuts, toolbar buttons, or the shortcut menu that pops up when you right-click on a selection.

Add styles to the shortcut menu

To add styles to the right-click shortcut menu, do this:

1. On the **Tools** menu, click **Customize**.
2. On the Customize dialog (Figure 40), choose the **Toolbars** tab and scroll down to select the **Shortcut Menus** checkbox. A small Shortcut Menus toolbar appears somewhere on your screen. Move it close to the top of the screen, if it isn't there already.

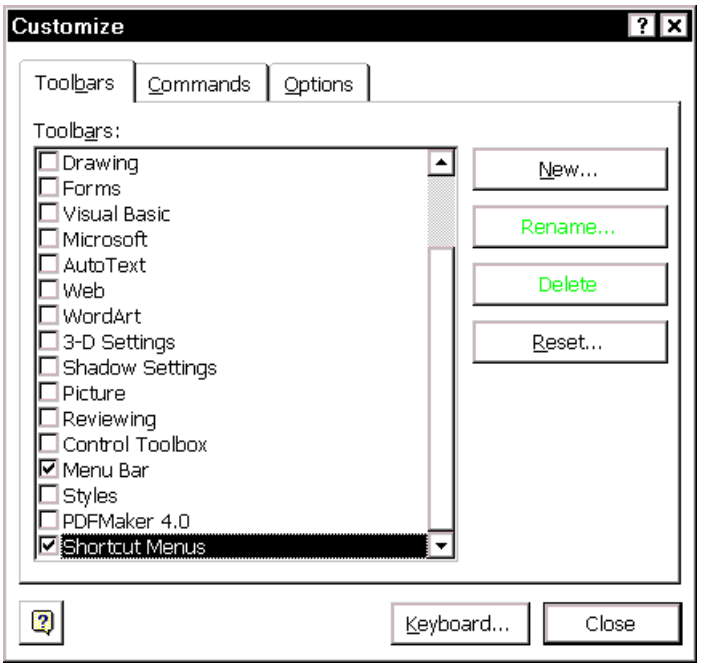

Figure 40. Choosing Shortcut Menus in the Customize dialog

3. On the Shortcut Menus toolbar, click **Text**, and from the drop-down menu that appears, click **Text**. (See Figure 41.)
4. The drop-down menu will stay in place. In the Customize dialog, select the **Commands** tab, and choose **New Menu** (under Categories). In the Command section on the right, the New Menu command appears (Figure 42).
5. Drag the New Menu command to the drop-down menu.
6. In the Customize dialog, select the Commands tab, and choose **Styles** (under Categories). In the Command section on the right, a list of available styles appears.
7. Drag the styles you want to use from the Command section to the new menu you've created, one at a time. The shortcut menu now looks like Figure 43.

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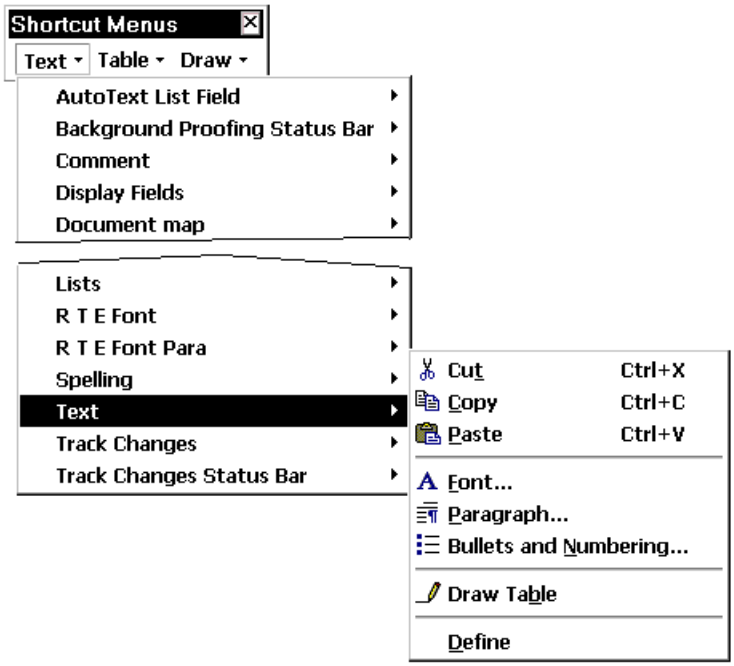

Figure 41. Choosing the Text shortcut menu

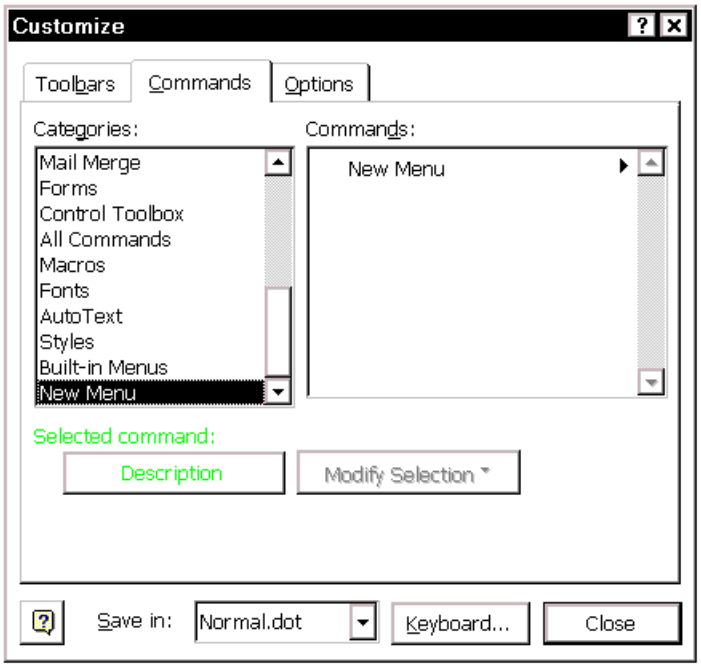

Figure 42. Choosing the New Menu command

8. Right-click on the New Menu command to rename it to something like Styles.
9. If you want to modify the text of the menu items (by default, they all have the word Style at the end), right-click each item and choose the Name command.
10. When you're finished, click **Close** in the Customize dialog box.

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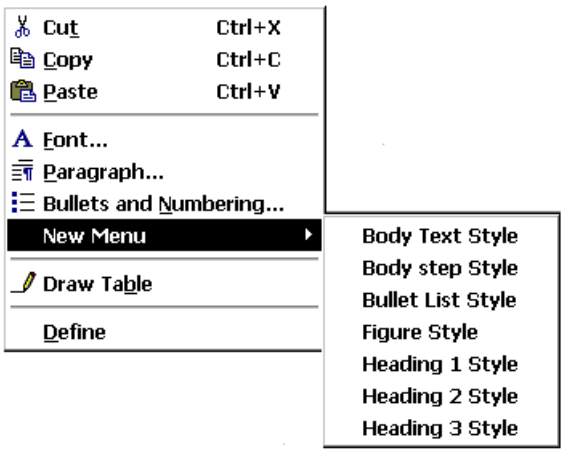

Figure 43. New menu showing styles added

Assign styles to keyboard shortcuts

Word provides default keyboard shortcuts for five commonly-used styles, in addition to dozens of shortcuts for other purposes. You probably use a few of these regularly but you don't try to remember all of them.

To assign styles to keyboard shortcuts, do this:

1. On the **Tools** menu, click **Customize**.
2. On the Customize dialog (Figure 40), choose the **Toolbars** tab, scroll down to select the **Styles** checkbox, then click **Keyboard**.
3. On the Customize Keyboard dialog, 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. Try again with another combination.
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.

Assign styles to toolbar buttons

Instead of (or in addition to) assigning styles to keyboard shortcuts, you can assign them to toolbar buttons. To do this:

1. On the **Tools** menu, click **Customize**.
2. On the Customize dialog (Figure 40), choose the **Toolbars** tab, then click **New**.
3. On the New Toolbar dialog, give the new toolbar a name (for example, Styles) and choose which template you want it attached to. The new toolbar now appears in the list on the Toolbars tab in the Customize dialog.
4. Select the checkbox for the toolbar you just created. A new toolbar appears somewhere on the screen.
5. In the Customize dialog, select the **Commands** tab, and choose **Styles** (under Categories). In the Command section on the right, a list of available styles appears.
6. Drag the styles you want to use from the Command section to the new toolbar you've created, one at a time.

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7. If you want to modify the text of the menu items (by default, they all have the word Style at the end), right-click each item and choose the Name command.
8. When you're finished, click **Close** in the Customize dialog box, and move the new toolbar to a convenient location.

Removing 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. You want to remove "Body first" and convert all those paragraphs to "Body text" paragraphs. Here's how to do it:

1. On the **Edit** menu, choose **Replace**. On the Find and Replace dialog, click **More** to expand the dialog.
2. Click in the **Find what** box, then click **Format** and choose **Style** from the list.
3. Choose from the list the style you want to replace ("Body first" in our example). The style name now appears below the Find what box.
4. Click in the **Replace with** box, then click **Format** and choose **Style** from the list.
5. Choose from the list the style you want to use as a replacement ("Body text" in our example). The style name now appears below the Replace with box, and the dialog looks like Figure 44.

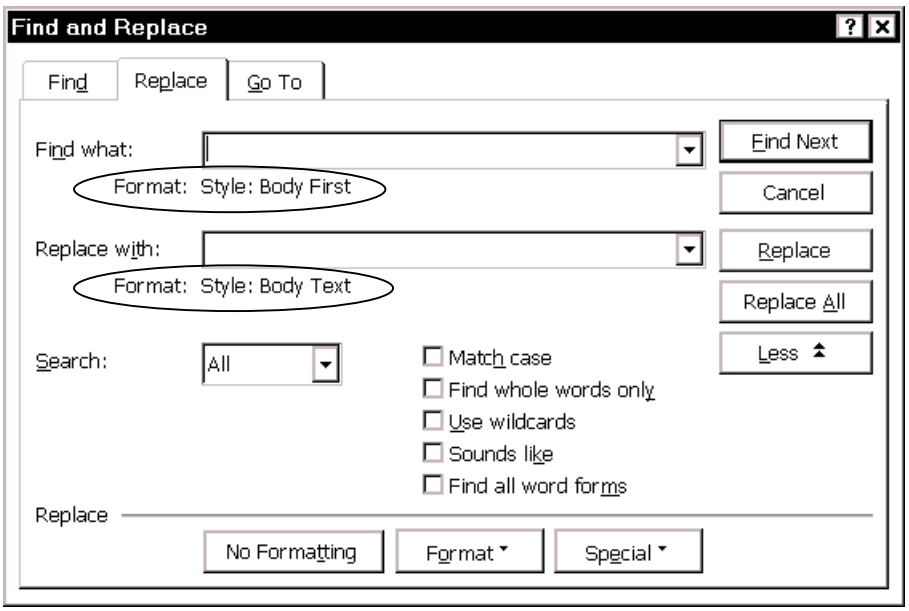

Figure 44. Replacing one style with another style in a document

6. Click **Replace All**.

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

On the **Format** menu, click **Style**, choose the style you want to change, then click **Delete**. Confirm by clicking **Yes** in the pop-up box.

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

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Chapter 5

Getting the most from fields

Fields are extremely useful features of Word. 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
- Using SEQ fields to solve numbering problems
- Fixing or avoiding list numbering problems in Word 97
- Numbering chapters and appendixes separately
- Including the chapter number in other number sequences
- Using fields in headers and footers
- Updating 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 22. The Custom tab (shown in Figure 45) 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. Select the property from the list below the **Name** box.
2. When the property's name appears in the **Name** box, click in the **Value** box and type a value. For example, in Figure 45, the property named "Editor" has the value "Daniela" and the property named "Publisher" has the value "Wrevenge."
3. Click **Add**. The name and value of the property appear in the Properties list.

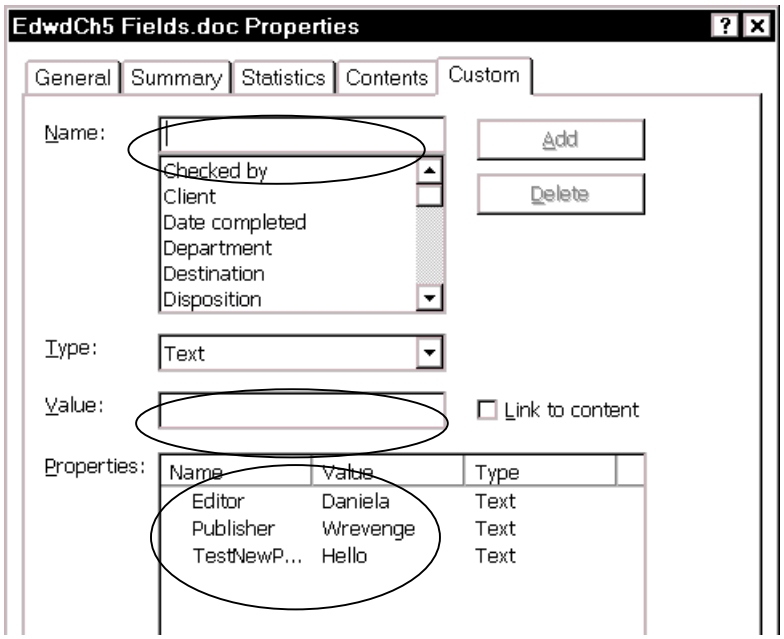

Figure 45. Defining a custom document property

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 **Insert** menu, click **Field**.
2. On the Field dialog (Figure 48), select **Document Information** in the Categories list, then **DocProperty** in the list of Field names.
3. Click **Options**. On the Field Options dialog (Figure 46), select the entry from the Property list and click **Add to Field**. The entry you select appears after the word “DOCPROPERTY” in the box below the list.
4. Click **OK** to return to the Field dialog, and **OK** to insert the field in the document.

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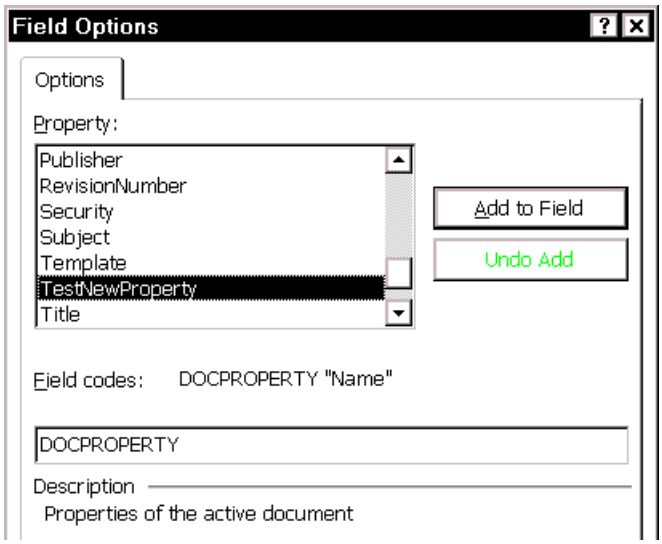

Figure 46. Choosing a document property to add to the field

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 **Insert** menu, point to **AutoText**, then click **New**.

Word 95 tip	On the **Edit** menu, click **AutoText**.

4. The Create AutoText dialog (Figure 47) appears. Type in the box a name for the entry you are creating. Click **OK**.

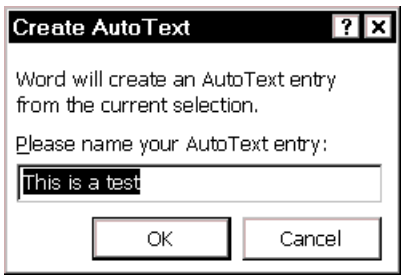

Figure 47. Creating an AutoText entry

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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 **Insert** menu, click **Field**.
2. On the Field dialog (Figure 48), select **Links and References** in the Categories list, then **AutoText** in the list of Field names.

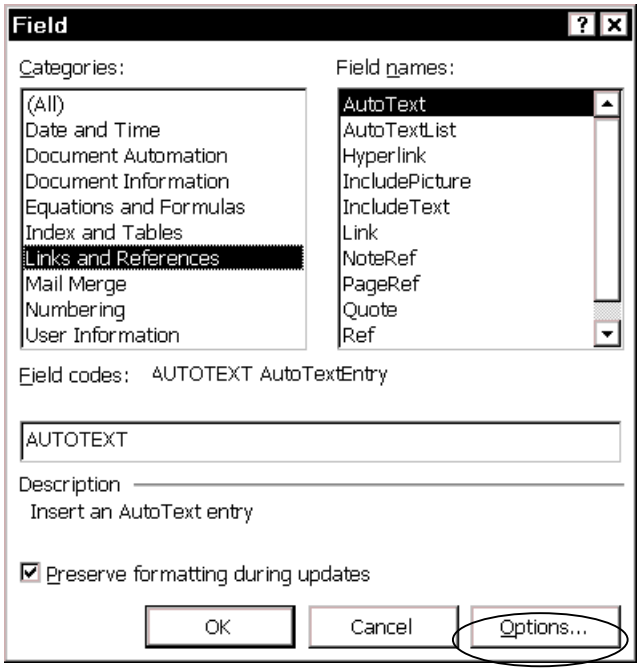

Figure 48. Selecting AutoText from the Links and References category of fields

3. Click **Options**. On the Field Options dialog (Figure 49), select the entry from the AutoText name list and click **Add to Field**. The entry you select appears after the word "AUTOTEXT" in the box below the list.

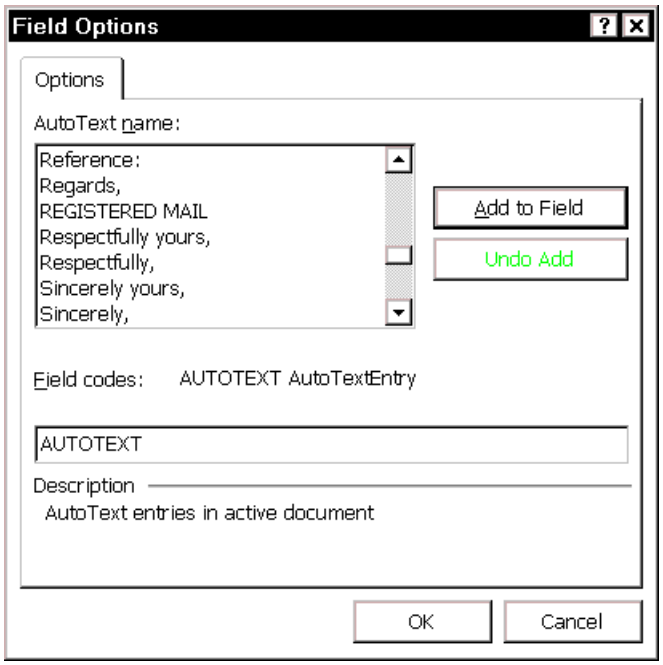

Figure 49. Selecting an AutoText entry to insert in a field

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4. Click **OK** to return to the Field dialog, and **OK** to insert the field in the document.
5. 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 do exactly what you did in the steps above. (See the online help for tips on how to record a macro.) You'll need to record different macros for each entry. Put the macros on the toolbar or a right-click shortcut menu item, so you can simply click on the entry you want to insert. You can use the techniques described in "Speeding up style selection" on page 44 to put macros on a toolbar or shortcut menu.
- 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 **Insert** menu, click **AutoText**, then click **New**.
4. In the Create AutoText dialog (Figure 47), 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 you have created:

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

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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 in Word 97
- Numbering chapters and appendixes separately
- Including the chapter number in other number sequences

Fixing or avoiding list numbering problems in Word 97

Word 6/95 In general, Word 6/95 users don't need to worry about these numbering problems. However, the technique described here does work in Word 6/95, and you might want to use it if your document is to be converted into some other format for layout and the conversion doesn't handle list numbering cleanly.

Word 97's (and Word 2000'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 (for example, FrameMaker), define and 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 this paragraph), define a "list continuation" 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, open the **Format** menu, click **Bullets and Numbering**, select **Restart numbering**, then click **OK**. (See Figure 50.)

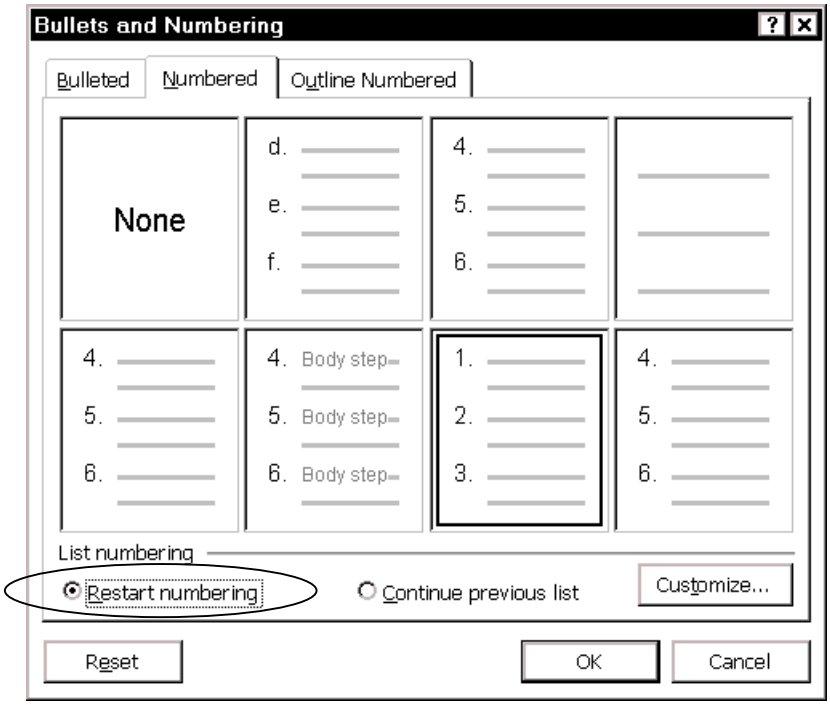

Figure 50. Restarting list numbering at 1

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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 **Format** menu, click **Bullets and Numbering**) and select the **Continue previous** list button.
6. For best results, don't use autonumbering at all; use SEQ fields as described in this section.

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 in the Normal template:

1. Start a new, blank document. Press **ALT+F9** to display field codes.
2. On the **Insert** menu, click **Field**. In the box at the bottom of the Field dialog (Figure 51), replace the equal sign with `SEQ Step \r 1` , then click **OK**.

Tip You can use the keyboard shortcut **CTRL+F9** to insert a blank field, then type `SEQ Step \r 1` between the curly brackets.

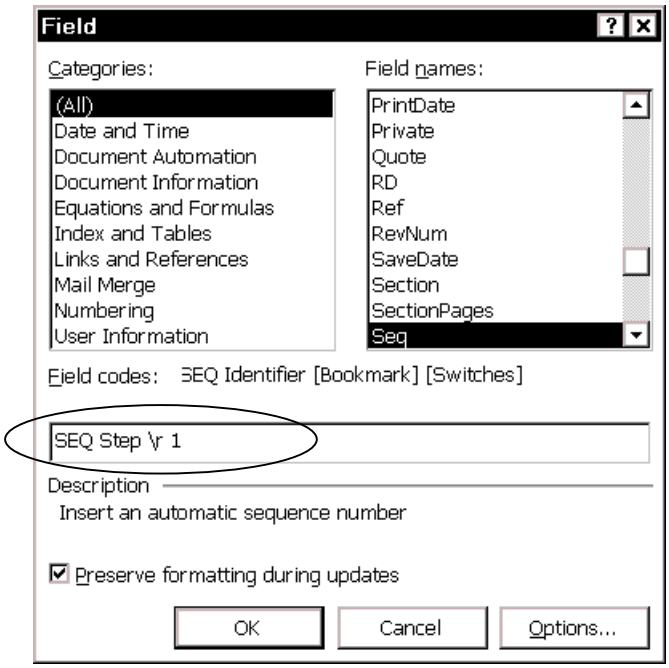

Figure 51. Defining a sequence field using the Field dialog

3. Back in your document, press **Enter** to start a new paragraph.
4. Insert another field for `SEQ Step \n` .
5. 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.
6. On the **Tools** menu, click AutoCorrect. In the **Replace** box (see Figure 52), type `1]` (you can use any character you want; it doesn't have to be]). If your document style is to include a period after the number, type a period after the 1 shown in the **With** box. Click **OK**.

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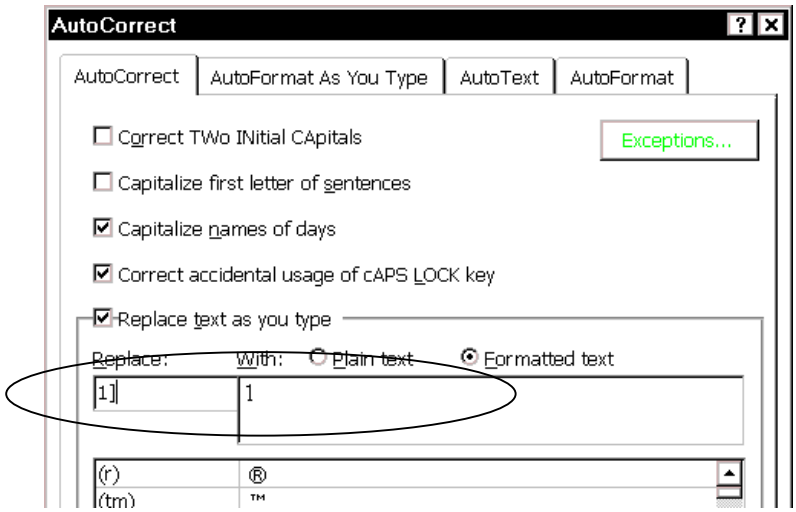

Figure 52. Defining an AutoCorrect entry

7. 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.
8. On the **Tools** menu, click **AutoCorrect**. In the **Replace** box, type `n]`. Click **OK**.
9. Save the document.

Define a new style for numbered lists

Second, define a new style for numbered lists:

1. On the **Format** menu, click **Style**, then click **New**.
2. On the New Style dialog (Figure 53), 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.

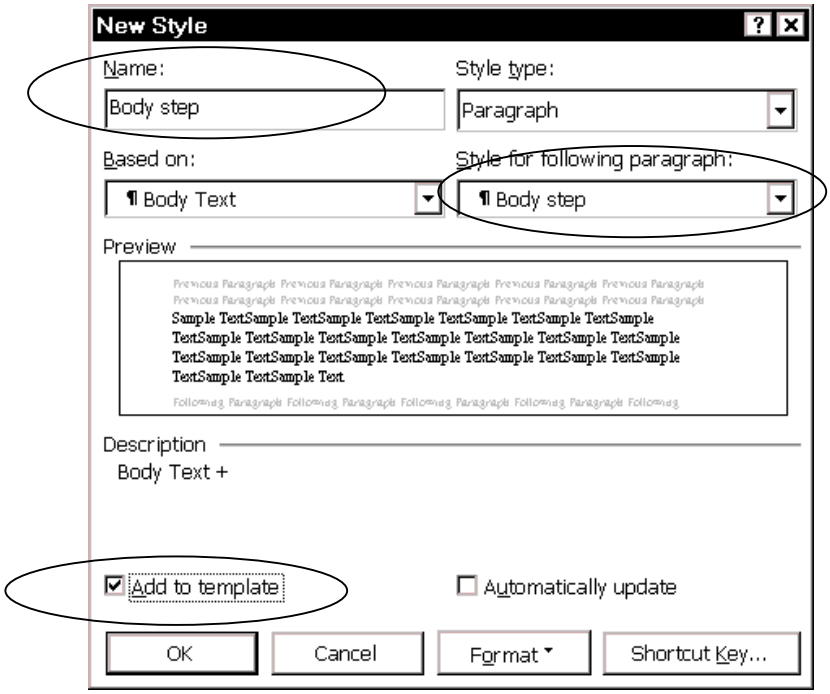

Figure 53. Defining a new style for numbered list paragraphs

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3. Click **Format** and select **Paragraph**. On the Paragraph dialog (Figure 54), include a hanging indent.

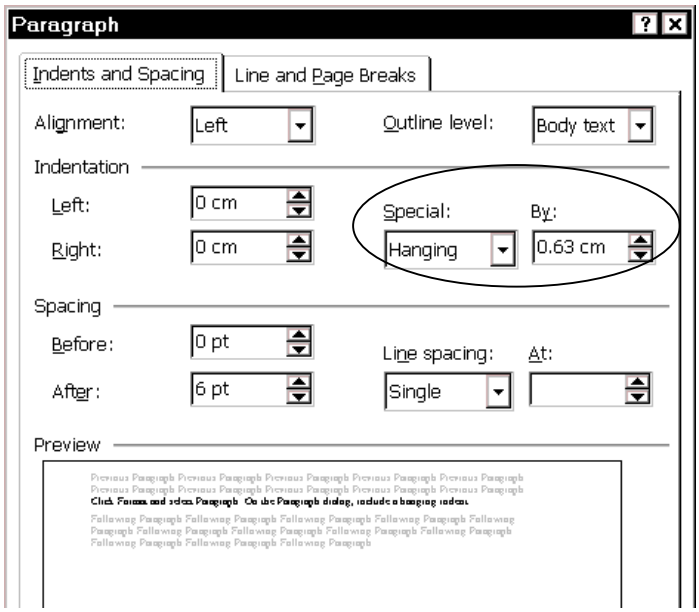

Figure 54. Including a hanging indent in a paragraph style definition

4 Click the **Tabs** button and specify a left tab at the same position as the hanging indent (see Figure 55).

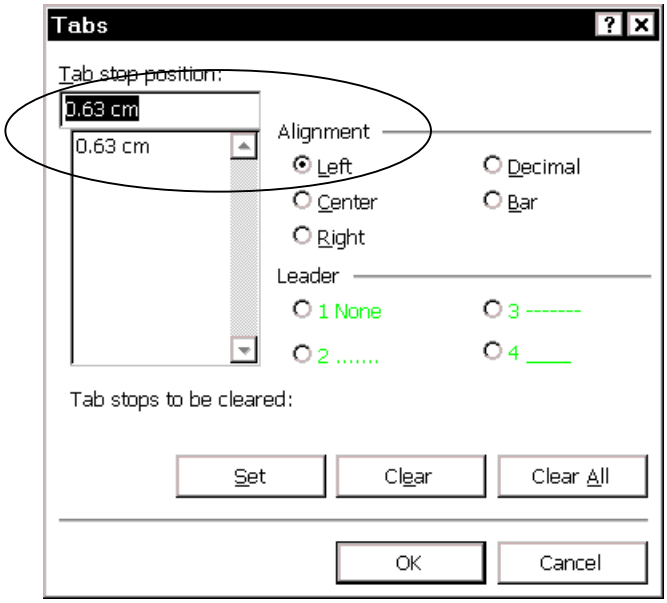

Figure 55. Defining a tab step in a paragraph style

5. Click **OK** twice to return to the New Style dialog (Figure 53).
6. Click **Format** and select **Numbering**. On the **Numbered** tab, make sure **None** is selected. Click **OK** twice to return to the Style dialog, then click **Close**.

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Use the AutoCorrect fields to number a list

To make it all work when writing a numbered list:

1. 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.
2 Type `1]`, press the **Tab** key, then type the text of the first item in the numbered list.
3 For the second and subsequent items:
   a. Press **Enter** to start a new paragraph.
   b. Type `n]`, press the **Tab** key, then type the text of the next item in the numbered list.
4. 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. Type `1]`, then press the **Tab** key.
4. For the second and subsequent list items, move the insertion point to the start of the next paragraph, type `n]`, then press the **Tab** key.

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 **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Chapter.
4. Click **Options.** On the Field Options dialog (Figure 56), choose the **General Switches** tab, select **123** in the **Formatting** list and **0** in the **Numeric** list, then click **Add to Field**.

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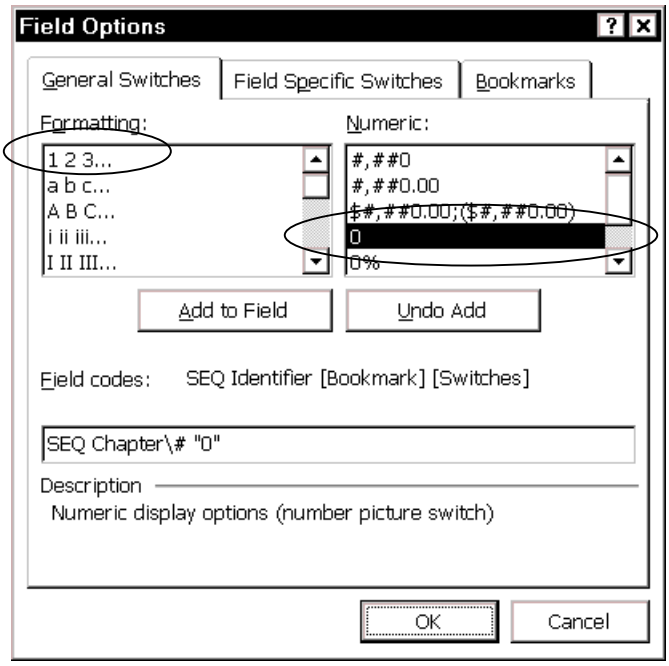

Figure 56. Specifying the display option for a chapter number sequence

5. Choose the **Field Specific Switches** tab (Figure 57), select **\h**, then click **Add to Field**.

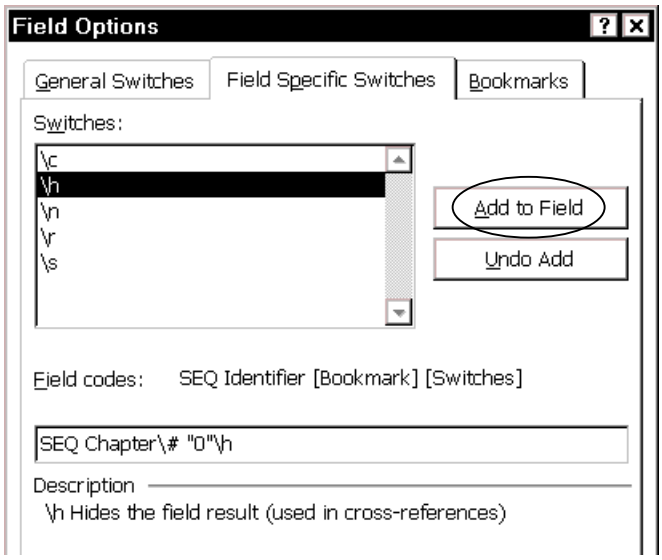

Figure 57. Specifying the \h option for a chapter numbering sequence

6. Click **OK** twice to insert the field, which will display as 1.
7. 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.

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Set the first chapter number in each file

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 61), this is worth doing.

To set a chapter number, follow this procedure:

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 **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Chapter.
4. Click **Options.** On the Field Options dialog (Figure 56), choose the **General Switches** tab, but do not select anything on this tab. Click **Add to Field**.
5. Choose the **Field Specific Switches** tab (Figure 57), select **\r** (not \h) and type the chapter number after the **r**. 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.
6. Click **Add to Field**, then click **OK** twice to insert the field.

Set up the appendix numbering sequence

To set up the appendix numbering sequence:

1. Place the insertion point where you want the first appendix number to appear (for example, after the word "Appendix" in the title). On the **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Appendix.
4. Click **Options.** On the Field Options dialog, choose the **General Switches** tab, select **A,B,C** in the **Formatting** list, do not select anything in the **Numeric** list, then click **Add to Field**.
5. Click **OK** twice to insert the field, which will display as A.
6. Choose the **Field Specific Switches** tab (Figure 57), select **\h**, then click **Add to Field**.
7. 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 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 61), this is worth doing.

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To set an appendix number, follow this procedure:

1. Place the insertion point where you want the first appendix number to appear (for example, after the word "Appendix" in the title). On the **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Appendix.
4. Click **Options.** On the Field Options dialog, choose the **General Switches** tab, select **A,B,C** in the **Formatting** list, do not select anything in the **Numeric** list, then click **Add to Field**.
5. On the Field Options dialog, choose the **Field Specific Switches** tab (Figure 57), select **\r**, and type the numeric equivalent of the appendix number after the **r**. The fields 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.
6. Click **OK** twice to insert the field, which will display as A.

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 **View** menu, click **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` .

Note: You can also insert these fields using the Field dialog, as described in "Numbering chapters and appendixes separately" on page 58.

To have the 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. In this example, you have used Chapter as your sequence name, so your TOC field should look something like this (refer to the online help for more information about these switches):

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

Similarly, to have the 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" }
```

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Using fields in headers and footers

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

See "Including the chapter number in other number sequences" on page 61 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 (on the **Insert** menu, click **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 **Insert** menu, click **Field**.
3. On the Field dialog (Figure 58), choose **Links and References** in the Categories list and **StyleRef** in the **Field names** list, then click the **Options** button.
4. On the Field Options dialog (Figure 59), choose the **Styles** tab. Select the required style name from the list shown and click **Add to Field**.
5. Click **OK** to return to the Field dialog. The selected style is now listed after STYLEREF in the box below the lists.
6. Click **OK**. The field is inserted. You can now work with this field as you would work with any other field.

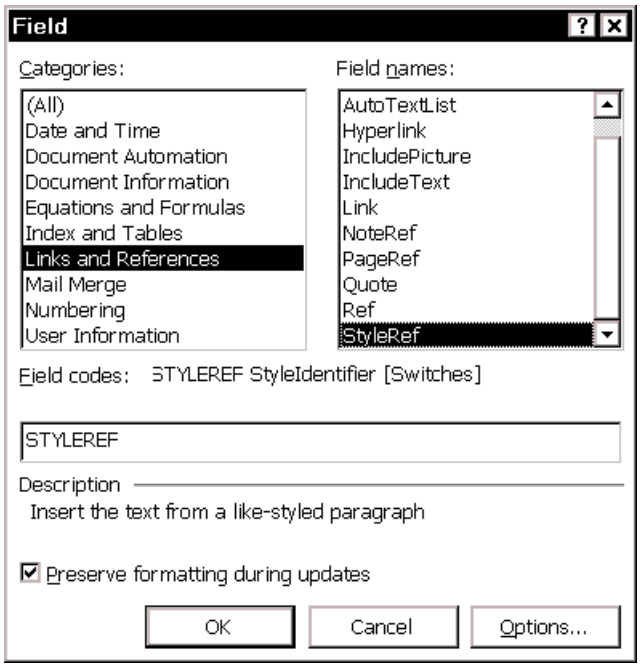

Figure 58. Using the StyleRef field

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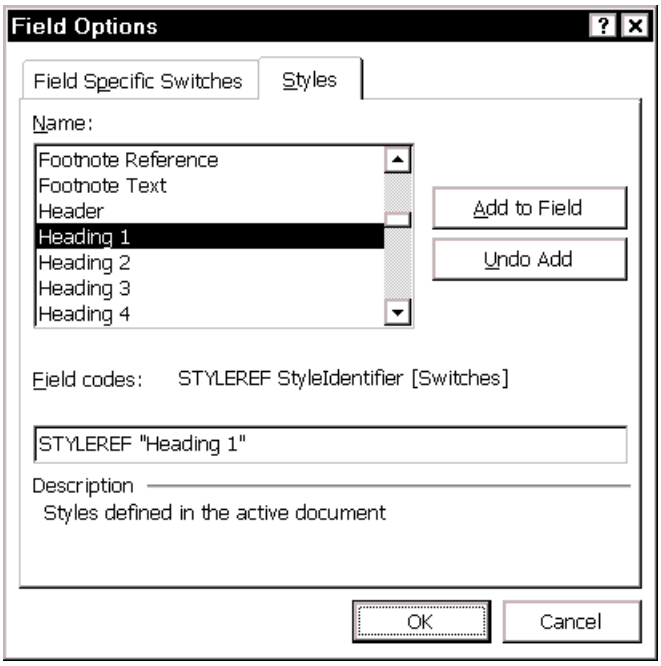

Figure 59. Selecting the paragraph style to be referenced by the StyleRef field

Updating fields in headers and footers

In Page 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**, so it's often a good idea to switch to Normal View (if you are in Page Layout View) before updating.

A common problem occurs if you are using the "Page *x* of *y*" fields in a header or footer: the *y* (total number of pages) doesn't update, or is the same as *x* on each page, or it looks right on screen but prints incorrectly, or it displays wrong but prints correctly. Here are some suggestions for overcoming this behavior:

- If you're using Word 2000, you can download and install the Service Pack. However, the Service Pack also affects your ability to receive attachments in Outlook, so you may not want to install it. Try the other suggestions instead.
- Change from Page Layout view to Normal view, then back to Page 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.

SHIFT+F9	Show or hide selected field codes
ALT+F9	Show or hide all field codes
F9	Update selected field codes

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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.

CTRL+F11	Lock selected fields
CTRL+SHIFT+F11	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 Page Layout View), press **CTRL+A** to select the entire document, then press **CTRL+SHIFT+F9**. (In Page Layout View, **CTRL+A** doesn't reliably select the headers and footers.)

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Chapter 6

Working with large or complex documents

This chapter describes some techniques to help you use Word effectively when working with large or complex documents, including tables of contents and indexes. Most of these techniques build on the use of fields, discussed in Chapter 5.

- 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 tables of contents and indexes from multiple files
- Inserting or linking to other files

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 65.)

Ordinary cross-references within one file are easy.

1. Place the insertion point where you want the cross-reference to appear.
2. On the **Insert** menu, click **Cross-reference**.
3. On the Cross-reference dialog (Figure 60), 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).

   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).

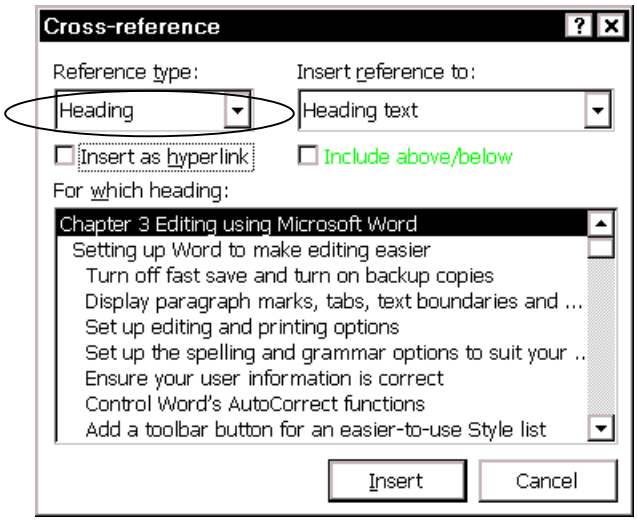

Figure 60. Selecting a heading cross-reference

Using bookmarks for cross referencing

Word's cross-reference dialog (Figure 60) 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 **Insert** menu, choose **Bookmark**. On the Bookmark dialog (Figure 61), type a meaningful name for the bookmark, then click **Add**.

Word 6/95	Bookmark is on the **Edit** menu.

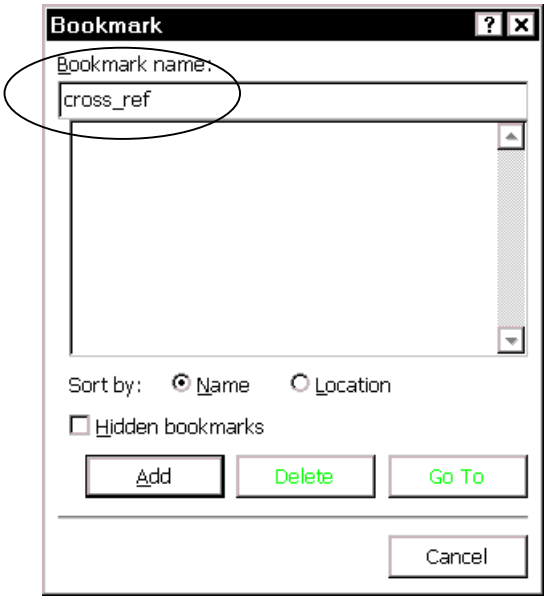

Figure 61. Creating a bookmark

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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.

Before you can cross-reference from one file (A) to another (B), you need to do some preparation:

1. Create bookmarks in file B, as described in "Using bookmarks for cross referencing." Include anything you want to reference from any other file: headings, captions, page numbers.
2. Make a list of bookmarks in file B, to use as a guide when you're inserting the cross-references in file A, or leave file B open with bookmarks showing (**Tools > Options > View** tab **>** select the **Bookmarks** checkbox).

To create a cross-reference to another file:

1. 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 c:\\path\\B.doc Bookmark_name \! \* Mergeformat`

   where *path* is the folder where file B is located, *B.doc* is the name of file B, and *Bookmark_name* is the name of the bookmark.
2. If the bookmark is to a `{PAGE}` field (which you set as hidden text in file B), select the whole field code, then press **CTRL+Spacebar** to make it visible in file A.
3. Repeat for each cross-reference required.

Note: if you cross-referenced any `{PAGE}` fields in file B, be sure to update fields in file B before updating fields in file A, to make sure that the page number is 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.

Creating captions for figures and tables

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

1. On the **Insert** menu, click **Caption**. On the Caption dialog (Figure 62), choose **Figure** from the Label list.
2. Type the caption contents after the automatic caption label and number that appears in the **Caption** box, then click **OK**.

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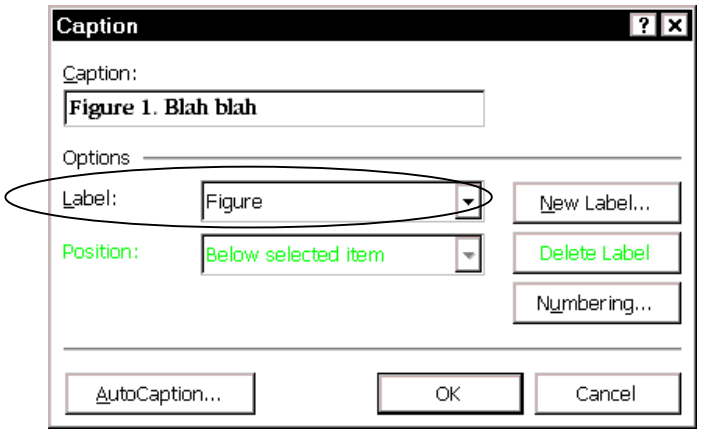

Figure 62. Using automatic figure captions

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."
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 **Insert** menu, click **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.

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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 58–60. 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.
2. Now select Heading 5 (or any other level you want to use) and click **Modify**. On the Modify Style dialog (Figure 38), choose Heading 1 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. Clear 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 63).

Word 6/95	When you modify the numbering of a built-in heading style, a Heading Numbering dialog is displayed, instead of the Bullets and Numbering dialog.

5. Choose the Chapter format if there is one, or choose any numbered style from those shown, then click **Customize**.

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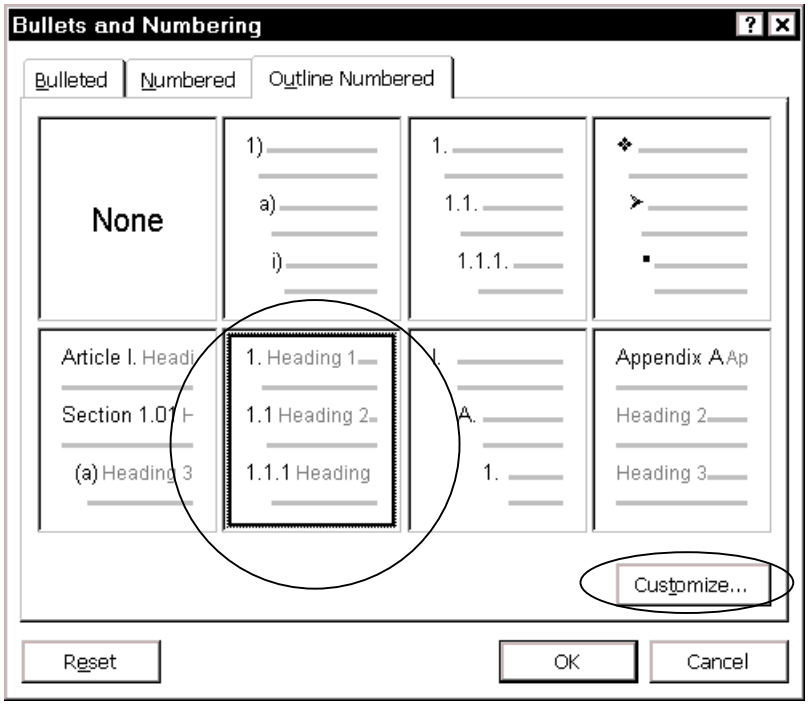

Figure 63. Selecting an appropriate outline numbering style

6. On the Customize Outline Numbered List dialog (Figure 64):
   - Change Chapter to Appendix in the **Number format** box. (**Note:** If you make an error, use the Backspace key to remove any text you entered and then want to change; the Delete key doesn't work in this field.)
   - Change **Number style** to **A, B, C**.
   - Select **1** in the **Level** box.

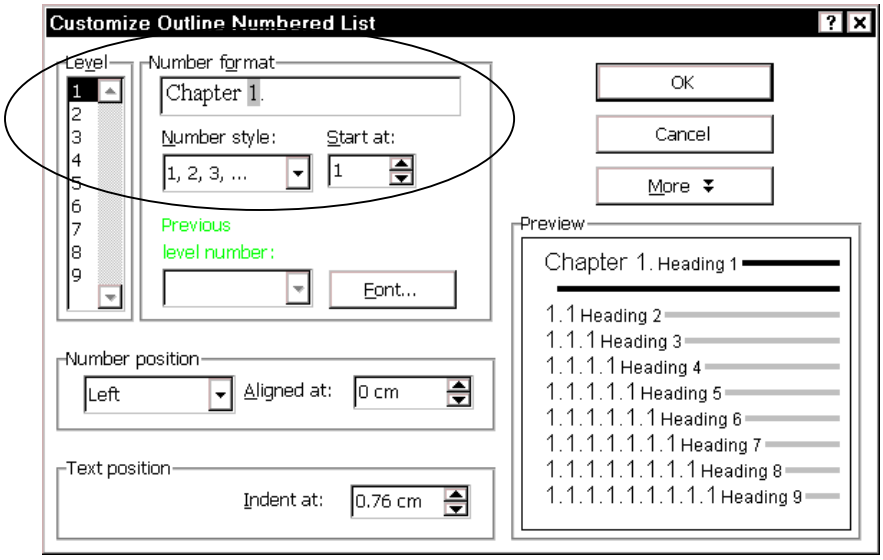

Figure 64. Changing Chapter details to Appendix details

7. Click **OK** twice to return to the Style dialog. Click **OK** to finish.
8. You can now apply the Heading 5 style to your first-level Appendix headings.

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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. Creating a table of contents involves two steps:

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

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 **Insert** menu, click **Index and Tables**.
3. On the Table of Contents tab of the Index and Tables dialog (Figure 65), 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.

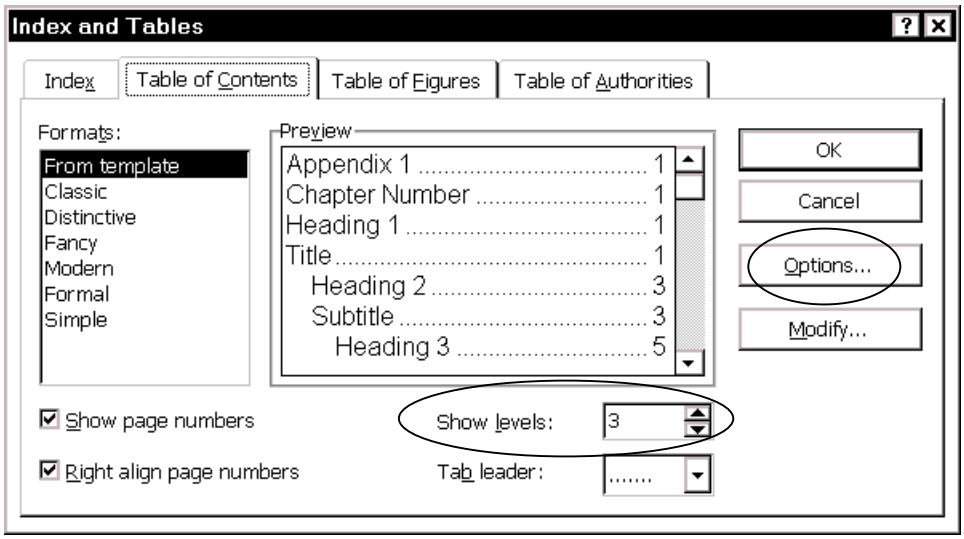

Figure 65. Defining the format of a table of contents

4. To choose some styles (in addition to heading levels) to be included in the table of contents, click **Options**.
5. On the Table of Contents Options dialog (Figure 66), select the **Styles** checkbox under **Build table of contents from**.
6. As an example, we will include Appendix numbers, created as described in "Numbering chapters and appendixes separately" on page 69. In the list of Available styles, find Heading 5 and type a 1 in the TOC level box. (Heading 1 should already be specified at TOC level 1.) Click **OK** to return to the Index and Tables dialog (Figure 65).

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

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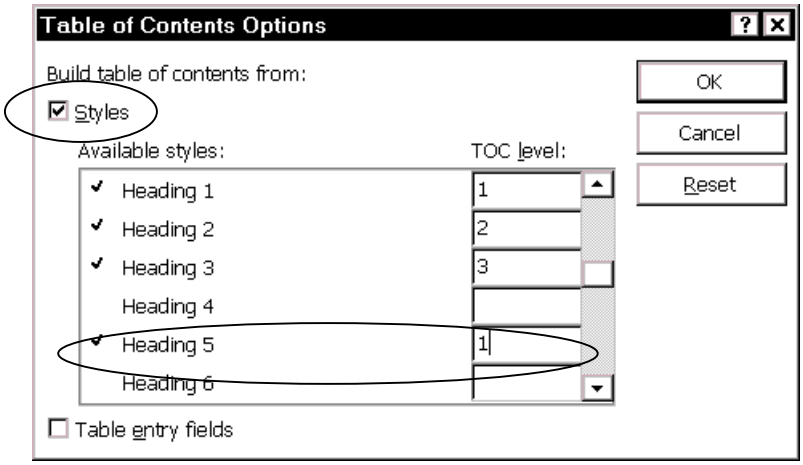

Figure 66. Specifying a style as a Table of Contents level 1 entry

Generate the table of contents

To generate a table of contents, click **OK** on the Table of Contents tab (Figure 65).

Editing a table of contents

To edit a Word tables of contents, 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.)

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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

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 **CRTL+ALT+X** to open the Mark Index Entry dialog (Figure 67). A highlighted word or phrase will appear in the Main entry box.

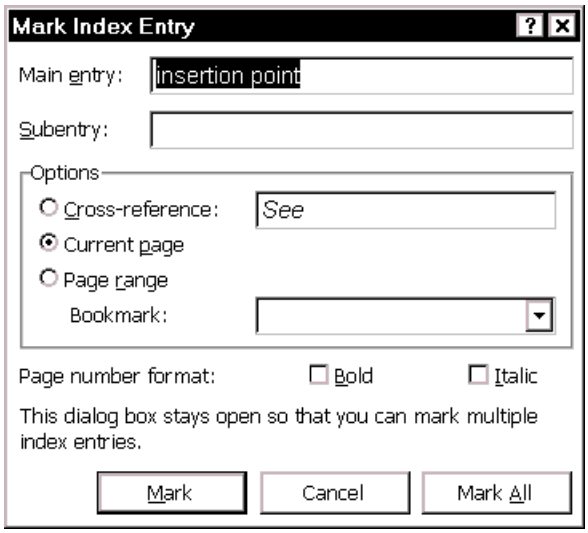

Figure 67. Creating an index entry

3. Change the entry if you wish, or add a subentry, then click Mark to insert the index entry into the file.

Define the format of the index

To define the format of the index:

1. On the **Insert** menu, click **Index and Tables**.
2. On the Index tab of the Index and tables dialog (Figure 68), 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.

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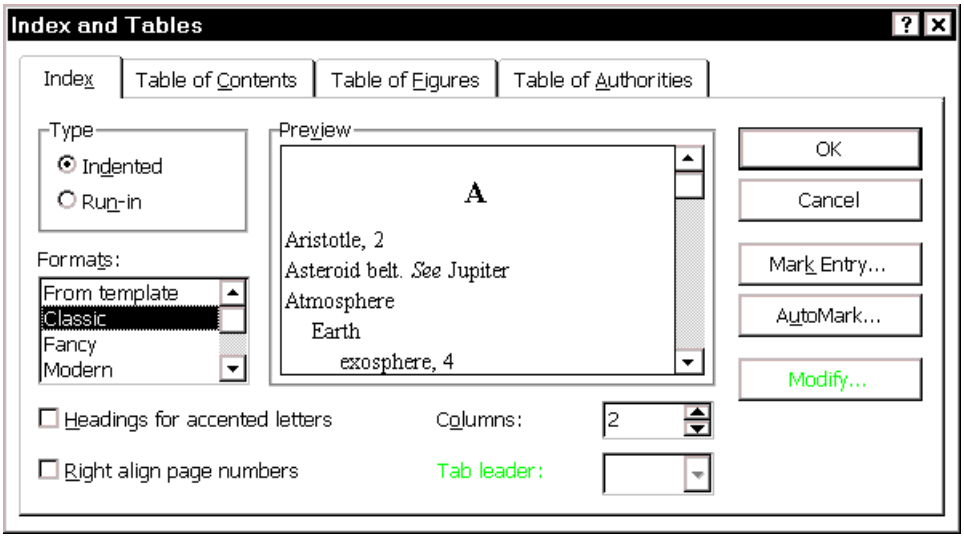

Figure 68. Defining the format of an index

Generate the index

To generate the index, click OK on the Index tab (Figure 68).

Include group separators in a custom index

Group separators 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 words Index and Tables dialog (Figure 68, reached from the **Insert** menu) include some formats that have group separators and some formats that don’t. Figure 68 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’ll have to insert your index using a field rather than using this dialog.

1. Place the insertion point where you want the index to appear. On the **Insert** menu, click **Field**.
2. In the **Categories** list, select **(All)**. In the **Field names** list, select **Index**. Click the **Options** button.
3. On the Field Options dialog (Figure 69), select `\h "A"` and click the **Add to Field** button, then click **OK**.
4. Back on the Field dialog (Figure 70), make sure the **Preserve formatting during updates** checkbox is selected, then click **OK**.

Your index will be generated using the styles you have defined for Index 1, Index 2, and so on; Index Heading is the style used for the group separator letters.

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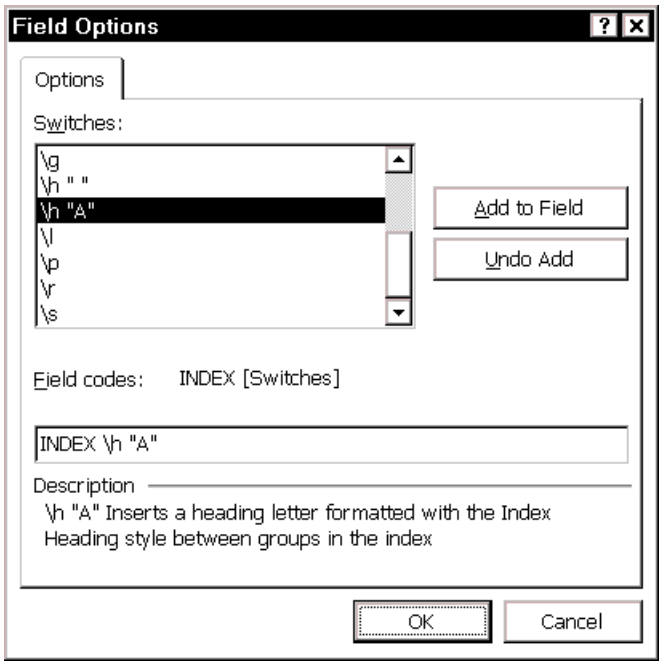

Figure 69. Adding a field option to display alphabetic separators in an index

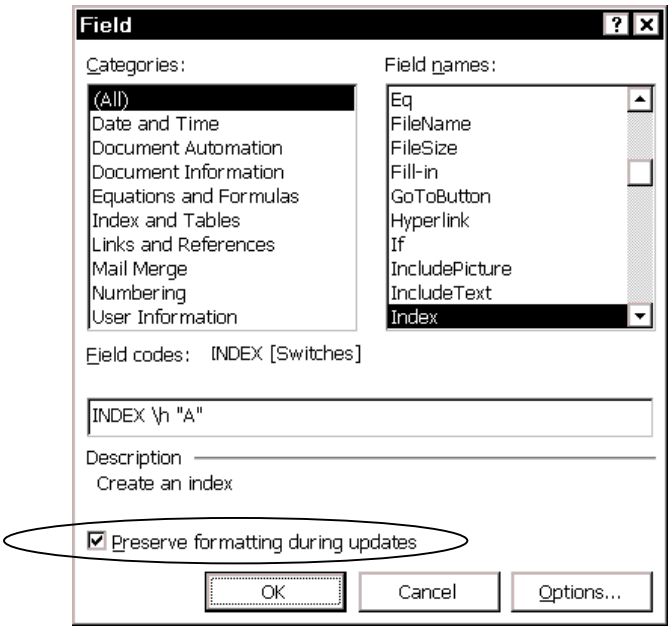

Figure 70. Specify preserving of formatting during updates of an index

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.

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Edit an index entry

1. On the **Tools** menu, click **Options**; then on the **View** tab, 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 **Tools** menu, click **Options**, then choose the 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 tables of contents and indexes from multiple files

If you must produce large, complex documents (such as books) using Word, do not use Master Documents. In theory this is a great way to build large documents out of a series of smaller files, but this feature has never worked reliably, so experienced Word users avoid it.

You can achieve the same result using another technique. This technique isn't quite as easy to use (until you get used to it), but it produces reliable results and will save you hours of hair-tearing frustration when Master Documents go wrong.

The secret is the RD (Referenced Document) field, which has the form { RD "FileName "}. 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.

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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 **View** menu, click **Header and Footer**. Go to the first page of the document and highlight the header or footer than contains the page number.
   b. On the **Insert** menu, click **Page Numbers**. Click the **Format** button.
   c. On the Page Number Format dialog (Figure 71), in the **Page numbering** section, click **Start at:** and type the page number in the box. Click **OK**.

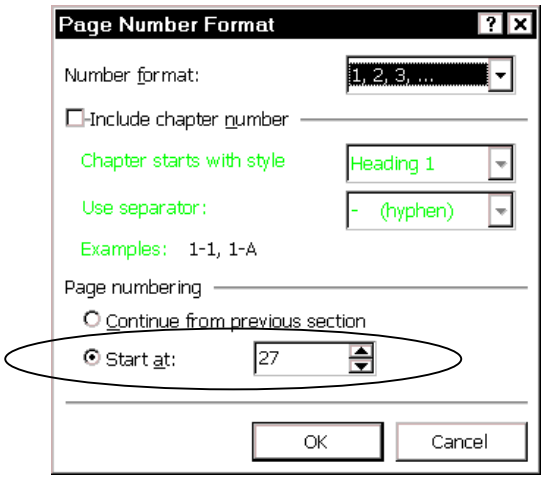

Figure 71. Specifying the starting page number for a file

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 54.

   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.

4. In the file where the table of contents is to appear, on the **Insert** menu, click **Field** to insert each of these fields, each in its own paragraph:

```
{ TOC }
{ RD filename1.doc }{ RD filename2.doc }{ RD filename3.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**).

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5. To generate the table of contents, select the { TOC } field and press **F9**.
6. Similarly, in the file where the index is to appear, on the **Insert** menu, click **Field** to insert:

   ```
   { INDEX }
   { RD filename1.doc }{ RD filename2.doc }{ RD filename3.doc }
   ```

7. To generate the index, select the { INDEX } field and press **F9**.
8. If you displayed hidden text to see the RD fields, click **Show/Hide** again to hide the fields.

Notes:

1. 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).
2. RD fields that reference a series of files must be in the same order as the files in the final document.

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. Choose **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. Choose **Insert > File**, select file C from the list, select the **Link to File** checkbox, and click **OK**.

Word 2000	**Link to file** is a choice on the drop-down list beside the **Insert** button.

- To insert or link pictures, choose **Insert > Picture > From File**. See "Embedding or linking graphics" on page 80 for more information.

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Chapter 7

Working with graphics and HTML

This chapter briefly covers a few issues related to working with graphics and HTML in Word:

- Creating graphics to use with Word
- Working with screen captures
- Embedding or linking graphics
- Turning off float over text (Word 97)
- Keeping the caption with the picture
- Editing graphics
- Cropping graphics
- Annotating graphics
- Changing autoshape defaults
- Keeping callouts with pictures
- Wrapping text around graphics
- Preventing the big red X in Word 97
- Writing and editing HTML files in Word

Creating graphics to use with Word

You can use any software you want to create photographs, line drawings, and other graphics, as long as you can save the file in a format that Word recognizes. You can even create some graphics using Word's drawing tools. Some tools are listed on page 98.

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. (Some common formats are .BMP, .TIFF, .GIF, .JPG, .WMF, .EPS.)
- **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; 16.7 million (24-bit). Lower color depths mean smaller files—often much smaller.

- **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 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, for best results, 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."

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.

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 picture in full color (16 million). In your graphics package, resample the picture to a smaller size (perhaps 75%), then sharpen the picture. Some people suggest going through the resampling and sharpening process several times; do some testing to see what works best for you. Finally, reduce the color depth to 256 colors, to decrease the file size; most screen shots don't have many colors in them anyway.
4. Optimize the color palette for the entire set of pictures for the document, using a package such as Palette Express (see page 94). This ensures that the colors used in one picture are the same as the colors used in all the other pictures.

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.

The advantage of embedding is that the graphics won't get lost when you send a file to someone else; it is 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 you have no automatic way to make sure you have the latest version of graphic files 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 file you'll be sure to have the most up-to-date copy.

If you copy a picture from one program and paste it directly into your file, that graphic is automatically embedded. However, if you use **Insert > Picture > From file**, you can choose whether to embed or link the picture. Use the technique that suits your situation best.

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Turning off float over text (Word 97)

Although Word's Float over Text setting for pictures can be useful in some situations (for example, in newsletters where you might want to place a picture precisely on a page and have the text wrap around it), in other situations this feature causes more problems than it solves.

If you want your pictures to remain in a particular sequence in the text (for example, a screen shot in a step of a procedure, or a little graphic in a sentence), rather than a specific place on the page (for example, in the upper right-hand corner), you do not want to use Float over Text. You want the picture to be "inline"—that is, to act like text in a paragraph. The picture could be in a paragraph of its own, in a table cell, or inserted like a character in a sentence (little pictures of icons are often done this way).

Word 6/95	Pictures are inline; to "float" them, you must put them into a frame.
Word 2000	Inline is the default, but you can choose to "float" a picture if you want to.

To change a floating picture to an inline picture:

1. Click on the picture.
2. On the **Format** menu, click **Picture**.
3. On the Format Picture dialog, choose the **Position** tab (Figure 72), deselect the **Float over text** checkbox, then click **OK**.

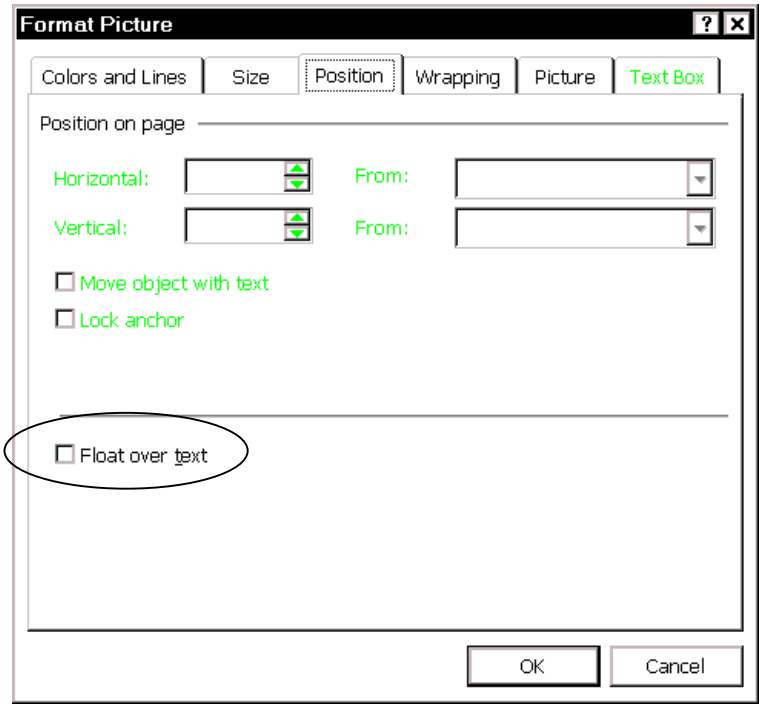

Figure 72. Turning off "float over text"

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Keeping the caption with the picture

If you are inserting captions (for example, changing non-automatic captions to automatic ones, here are two ways to keep the caption with the picture.

Define the figure or caption style to include keep with next

1. Define a style for figures, as described in "Defining a new paragraph or character style" on page 43. 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 38). Then click **Modify**, choose **Format**, then **Paragraph**, and on the Line and Page Breaks tab, select the **Keep with next** checkbox.

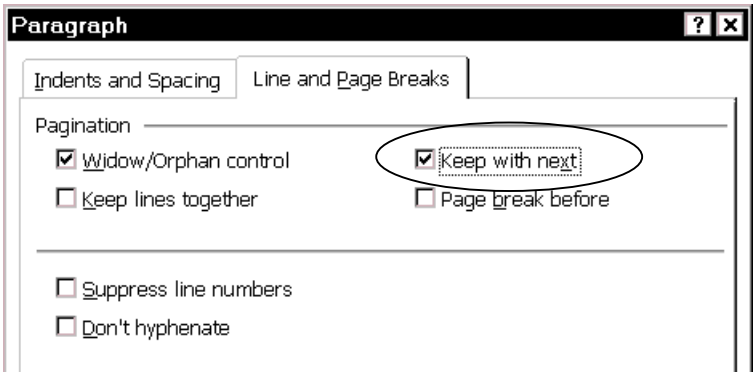

Figure 73. Keeping a figure with a following caption

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.

Choose keep with next for individual captions

1. Insert the picture. Select the picture or the paragraph containing the picture.
2. On the **Insert** menu, click **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.

Editing graphics

If graphics were produced using the Word's Drawing tools, you can edit them directly in Word. To edit other graphics, you may need to use the software that produced them (for example, PowerPoint or Visio) or you may be able to use equivalent software (for example, bitmaps, gifs or jpegs can be edited using a variety of image-editing software).

Consult the documentation for your graphics software for instructions on how to edit graphics.

Cropping graphics

When possible, crop graphics (cut off unwanted portions at the edges) in your graphics software, to reduce file size and prevent any problems if you convert the Word file to some other format (the cropping might not convert).

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If you do need to crop a graphic in Word 97, 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 and then selecting the amount of cropping you want in the **Crop From** boxes.

Word 6/95 Here's how to crop a picture in Word 6/95:

1. Select the graphic.
2. Hold down **Shift** and click a sizing handle so it becomes the cropping tool.
3. Drag the sizing handle toward the graphic.

Annotating graphics

You can use Word's drawing tools to insert callouts and other annotations to graphics:

1. If necessary, display the Drawing toolbar (click the **Drawing** button on the Standard toolbar, or point to **Toolbars** on the **View** menu and select **Drawing**).
2. Click on the picture you want to annotate.
3. On the **Drawing** toolbar, click **AutoShapes**, point to **Callouts**, and click an appropriate style.
4. The pointer changes to a cross (+). Click and drag where you want the comment to appear (you can move it later, if necessary). Type whatever you want.
5. 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.

Changing autoshape defaults

If you will be inserting a lot of callouts, you may want to change the default autoshape attributes to a format of your choice. To do this:

1. Create and format a callout as described in "Annotating graphics" on page 83.
2. Select the callout, then click the small arrow by **Draw** on the drawing toolbar. Select **Set AutoShape Defaults** from the popup menu.

Keeping callouts with pictures

Before you insert a callout, be sure you click on the picture it goes with. This helps by keeping the callout with the picture, so the two will move together if the picture's location on the page changes, but it does not prevent minor differences from occurring.

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To make completely sure that the callouts will remain precisely where you want them, you have two choices:

- Open the picture outside Word in a graphics package. Create the callouts there and save them as part of the picture itself.
- In Word, double-click on the picture to open it in Word's picture editor. Add the callouts. Then click the border (or Reset Picture Boundary) button on the Edit Picture toolbar (Figure 74) that usually pops up when you open the graphic. This button groups the picture with everything you've added to it.

  (Don't confuse the Edit Picture toolbar with the Picture Toolbar that is usually displayed when you select—but don't open—a picture in Word.)

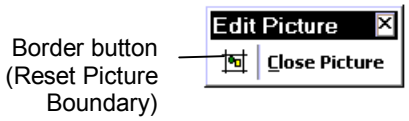

Figure 74. Edit Picture toolbar

Wrapping text around graphics

Word's "text wrapping" features can be useful for some purposes, for example brochures and newsletters. However, before you can use them, you need to float the picture. As mentioned in "Turning off float over text (Word 97)" on page 81, in many cases floating causes a lot of trouble.

1. Click on the picture. On the **Format** menu, click **Picture**. (Or right-click on the picture and choose Format Picture from the shortcut menu.)
2. On the Format Picture dialog, choose the **Position** tab (Figure 72) and select the **Float over text** checkbox.
3. Now choose the **Wrapping** tab (Figure 75), where you can choose the wrapping style required.

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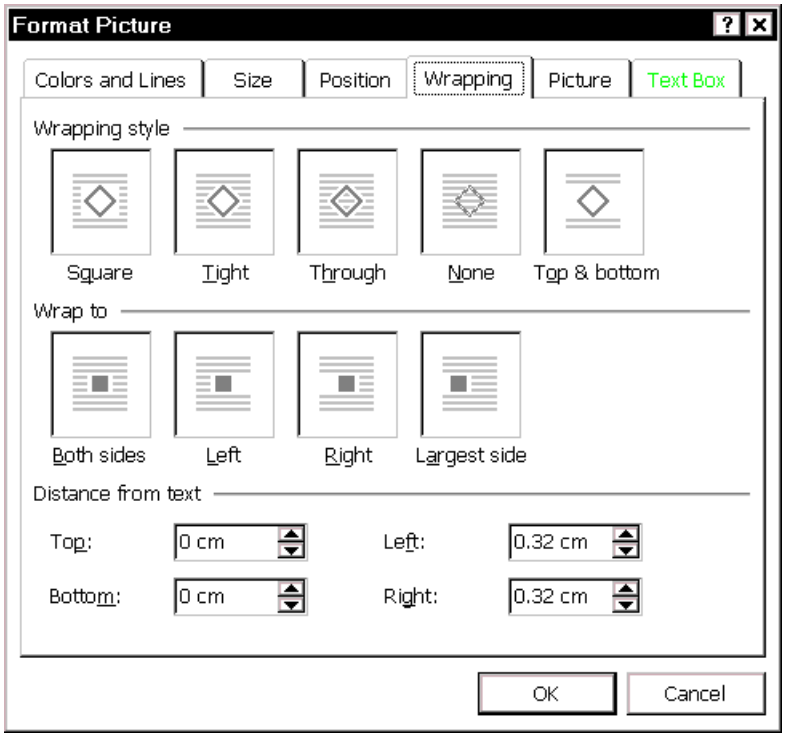

Figure 75. Choices for wrapping text around pictures in Word

Preventing the big red X in Word 97

A common problem in Word 97 is receiving from someone else a document that should contain graphics, but some or all of the graphics are displayed as red Xs or a general picture (such as a circle, square, and triangle).

Many things can go wrong with graphics in Word. A full treatment of the problems would take up another full chapter in this book, so I'll just mention two common problems.

The first problem arises from linked graphics. As mentioned in "Embedding or linking graphics" on page 80, graphics can be either embedded or linked. If you did not receive linked graphics with the text file, you'll need to get them sent to you, and you'll have to make sure they are stored in a folder with the exact same path as on the system they were sent from, because Word uses "absolute" path names instead of "relative" path names.

Second, many graphics problems can be solved by making these changes:

1. Upgrade your copy of Word 97 to SR-1 or SR-2 (best).
2. Turn off Fast Save: on the **Tools** menu, click **Options**. On the **Save** tab (Figure 3), deselect the **Allow Fast Saves** checkbox.
3. Turn off **Update Automatic Links at Open**: On the **General** tab of the Options dialog (Figure 8), deselect the **Update automatic links at Open** checkbox.

Unfortunately, after having done that, you'll probably also have to manually restore the missing or corrupted graphics.

Some other problems can cause the missing-graphics effect, so what you have to do to recover or prevent the problem will vary. For a full treatment of the problem and how to restore the graphics, read this item in the Microsoft Knowledge Base:

`http://support.microsoft.com/support/kb/articles/q162/3/49.asp`

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Writing and editing HTML files in Word

Although you can write and format a document in Word and then save it as HTML, the results are often not very good. Word attempts to make the resulting Web page look just like the Word document—including all fonts and layout, but often what looks good in print does not look good online. In addition, Word is notorious for including large amounts of unnecessary coding in the HTML files, making them much larger than necessary. Word 2000 is even worse than its predecessors, but a filter does exist; see "Save Word 2000 files as HTML" on page 87.

You can, however, use Word to produce clean HTML files that can be brought into a website editor such as Microsoft FrontPage or Macromedia Dreamweaver. This can be very useful if your content writers need to indicate heading levels, numbered or bulleted lists, bold or italic words, and other basic formatting, but they are not responsible for the design and layout of the final Web pages.

Create clean HTML files using Word

The secret to keeping excess code out of HTML files produced by Word is to not convert from a .DOC file, but to create a file based on the HTML.DOT template which is supplied with Microsoft Office. The easiest way to do this is to choose **File > New** to open the New dialog box that lists all the templates. On the **Web Pages** tab, choose **Blank Web Page**.

Make sure you use **only** the H1, H2, H3 etc styles for headings (NOT Heading 1, Heading 2, etc) and Normal for everything else. For a list, first type the list items, then select all of them and click either the **Number** or **Bullet** button on the toolbar. For bold, italic, or underlined words or phrases, select the word or phrase and click the relevant toolbar button. Do **no** manual font/character formatting except bold, italic, or underline. Do **no** manual layout formatting at all. (I tried some simple tables and they worked fine; I haven't tested this method with complex tables yet.)

When you save the document, it is saved as an HTML file, not a DOC file. Open the HTML file in NotePad and you'll see it's clean.

You can convert from an existing document, but it takes extra steps to get rid of unwanted code. The conversion attaches the HTML.DOT template, but I find that I usually then have to apply the correct styles (H1 in place of Heading 1 etc) and make sure everything else is tagged with the Normal paragraph style. Sometimes I have to fiddle with the Normal style (and sometimes the heading styles) to make sure they have no font or other attributes that are different from the Default Paragraph Style.

Edit HTML files in Word

Normally when you open an HTML file in Word, it attempts to display a formatted web page, by converting the file to hide the HTML code. If you make changes to the page and save, Word often does unwanted things to the code.

What if you want to edit the code? Most people who work with HTML code strongly recommend that you don't use Word, but rather a text editor or HTML editor. However, you can edit HTML code in Word, just as you can edit any other text file. Here's the secret:

1. On the **Tools** menu, choose **Options**.
2. On the **General** tab (Figure 8 on page 6), select the **Confirm conversion at Open** checkbox.
3. Now when you open an HTML document, the **Convert File** dialog (Figure 76) will appear, with HTML Document highlighted. Scroll up to find **Text Only**, select that, then click **OK**. The document will open as a plain text file.

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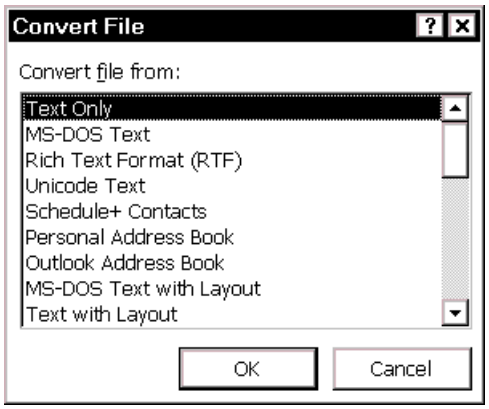

Figure 76. Choosing Text Only to open an HTML file as text in Word

Save Word 2000 files as HTML

If you must convert Word 2000 files into HTML, you need to get Microsoft's Office 2000 HTML Filter 2.0 from this Web address:

`http://officeupdate.microsoft.com//2000/downloadDetails/Msohtmf2.htm`

This utility removes the Office-specific XML tags, which are intended for users who post Word documents to a company intranet for collaborative work and editing. While this works quite well, the resulting code bloat makes the files worthless for Web publishing, and other HTML editors or help authoring tools don't cope well if you try to import these files.

The utility adds a new item to the **File** menu: **Export to > Compact HTML**.

With slightly more trouble (opening a DOS box) there are some good command line switches that can control just how pure you want the output to be. With appropriate filtering choices, you can create output containing almost no extraneous markup, much better than the files created via Export to Compact HTML in Word.

Explanations and instructions are provided through links from the address above.

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Chapter 8

Creating PDF documents from Word using Adobe Acrobat 4

Portable Document Format (PDF) files have become popular as a distribution method for both review copies and final copies of documents.

Acrobat Reader is a free program for reading PDF documents onscreen or printing them (if they are not protected against printing). Acrobat Reader does not provide tools for creating, editing, or annotating those files.

Adobe Acrobat 4 is a collection of programs for creating and modifying electronic documents in PDF. Acrobat includes macros for Microsoft Office 97 applications, so you can create PDF files directly from those applications. The PDFMaker macro for Microsoft Word and PowerPoint can create PDF files using Acrobat Distiller, and it supports Acrobat features such as the retention of hyperlinks with a document.

You can use other methods to produce PDF files (see "Using alternatives to Adobe Acrobat" on page 95), but those methods may be unsuitable for documents requiring careful selection of settings to minimize file size and maximize graphic quality, and free services may limit the number or size of documents you can have converted.

A detailed discussion of how to use Adobe Acrobat 4 to create PDF documents is beyond the scope of this book. This chapter provides a brief introduction to:

- Hints for getting the best results
- Setting up Acrobat 4
- Using PDF Maker
- Printing to a PostScript file and distilling
- Using alternatives to Adobe Acrobat

Hints for getting the best results

- Be sure you have installed the latest Adobe PS driver for Acrobat 4, and always "print" a PDF using this driver. You don't need to have a physical PostScript printer attached; all you need is a PostScript printer driver. Even if you do have a physical PostScript printer installed, don't use its driver—use the Adobe PS driver.
- Don't use the PDF Writer option in PDF Maker for more than simple, text-based documents or perhaps draft copies of a more complex document where, for example, you're not concerned about the quality of the illustrations but only whether the correct illustration has been used.

  Instead, either print to a PostScript file and use Acrobat Distiller to produce the PDF, or use the Distiller option in PDF Maker, which is a set of macros that takes care of the intermediate steps for you.

Distiller produces smaller (often much smaller) file sizes, in addition to clearer graphics. It gives you much more control over the results.

- Specify whatever job options you want in Distiller, before running PDF Maker.
- Be sure you have at least three times the size of the PostScript file available as free space on your hard disk, before attempting to distill the file. The resulting PDF file may be considerably smaller than the PostScript file, but the Distiller needs a lot of space to do its work.
- Many expert users recommend that you use only Type 1 fonts (not TrueType fonts) in your original document. Other users have no problem with TrueType fonts.
- Test a small file, containing examples of typical fonts and graphics, to determine what combination of Distiller settings give the best results. If the final PDF file is to be read on screen and printed by users, be sure to test on different monitors and different printers (the results can be dramatically different at 300 dpi, 600 dpi, and 1200 dpi).

Setting up Acrobat 4

Essential steps for setting up Acrobat 4:

1. Install Acrobat 4 and any upgrades on your computer, following the instructions given by Adobe.
2. Make sure you have installed the latest AdobePS printer driver. If necessary, download it from the Free Plug-ins & Updates section of http://www.adobe.com
3. Check the printer properties to make sure the paper size selected is the same as the paper size you have set in Word. Strange things can happen if the two settings are not the same.

You can either use the pre-defined job options for Distiller or modify them to suit your requirements. Job options are pre-defined for print optimized, press optimized, and screen optimized PDF output. Use the appropriate pre-defined options on a test file; if you're not completely happen with the results, then start tweaking the options.

1. Open Acrobat Distiller (Figure 77). Select one of the items on the Job Options list. On the **Settings** menu, click **Job Options**.
2. Study the options carefully, and choose settings that optimize for the document's purpose, which could be printing on a low-resolution local printer, printing on a high-resolution printer, or viewing online.

   A detailed discussion of the options is outside the scope of this book. Study the Distiller Parameters Guide, found under the **Help** menu on the Distiller main dialog.
3. Here are a few suggestions to help you get acceptable results for both on-screen viewing and printing from the same PDF file, by changing the Compression and Resampling settings.

   If your pictures are mainly screen captures, switch Resampling off and use the 8-bit ZIP compression setting.

   If your pictures are mainly photographs and the PDF is intended mainly to be read on screen, you might get acceptable results if you leave Resampling on and choose a medium JPEG compression setting.

After you have set up Distiller, you are ready to create PDFs.

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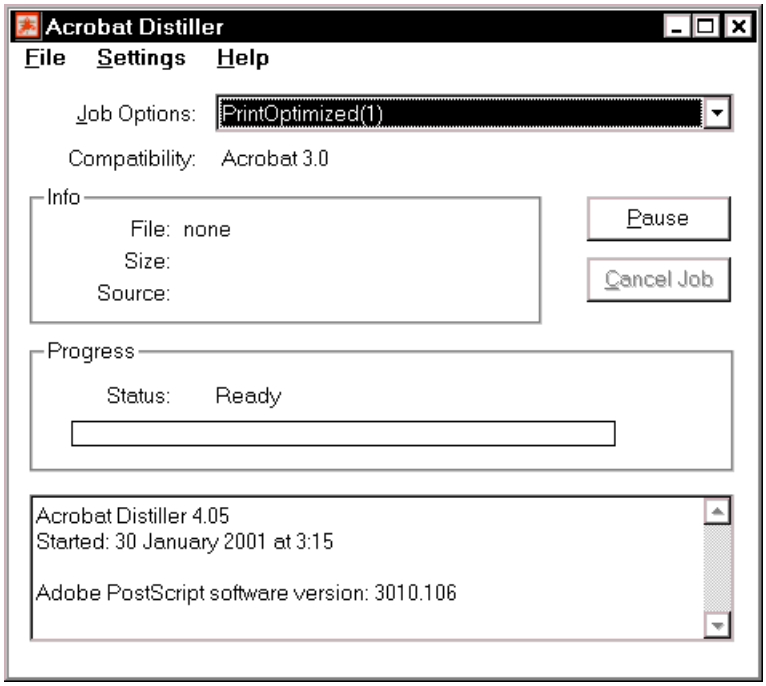

Figure 77. Choosing job options from the Acrobat Distiller dialog

Using PDF Maker

To create a PDF file from within Word:

1. On the **File** menu, click **Create Adobe PDF**.
2. On the **General** tab of the Acrobat PDFMaker dialog (Figure 78), select **Use Acrobat Distiller** and **Print via Distiller's printer**. Choose the Distiller settings required for this job. (You previously defined all these settings.)

   Also choose whether you want:

   - To be prompted for the name of the PDF. This choice includes deciding where the resulting file will be stored, so you probably want to do this, rather than letting Distiller do it.
   - To view the PDF immediately after creating it, a matter of personal preference; you may find it useful or a nuisance to have Acrobat open at the end of the job.
   - To have Distiller display errors on screen. Again a matter of preference, but generally very useful for trouble-shooting.
   - To have the intermediate PostScript files deleted automatically at the end of the job. These files can be huge and can quickly fill up your disk space if you're doing a lot of them.

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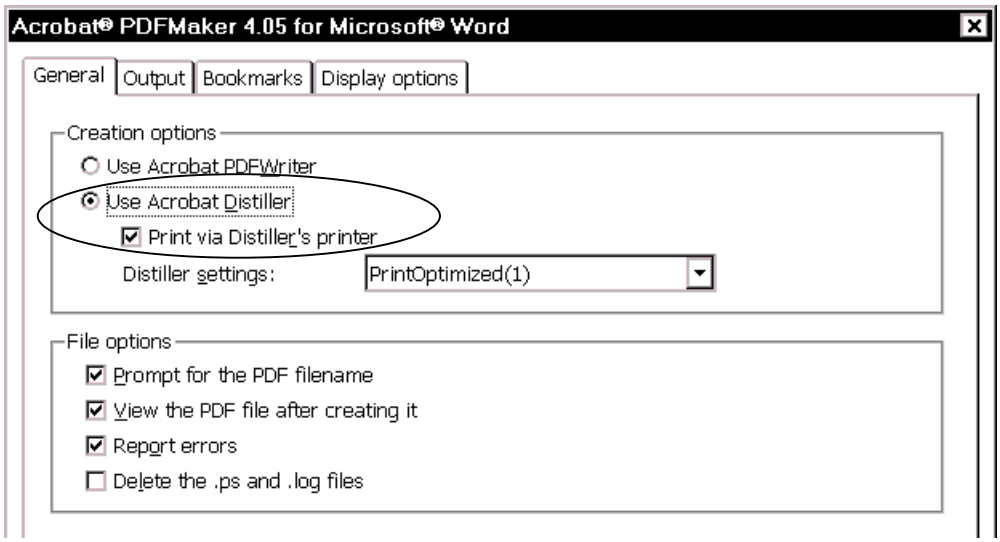

Figure 78. Choosing Acrobat Distiller in PDFMaker

3. On the **Output** tab (Figure 79), choose the features you want included in the PDF.

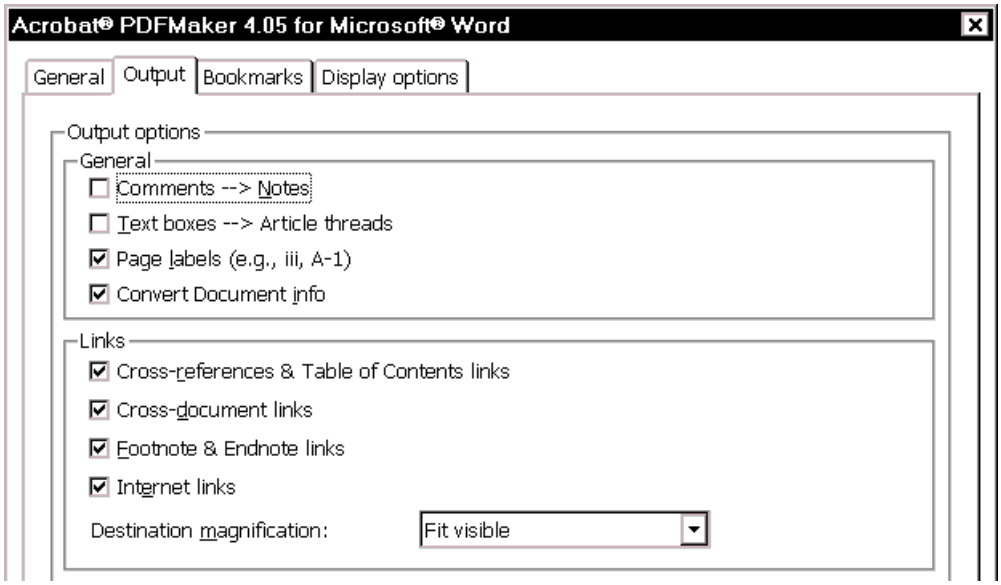

Figure 79. Choosing output options for Distiller

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4. On the **Bookmarks** tab (Figure 80), choose the heading levels you want turned into PDF bookmarks.

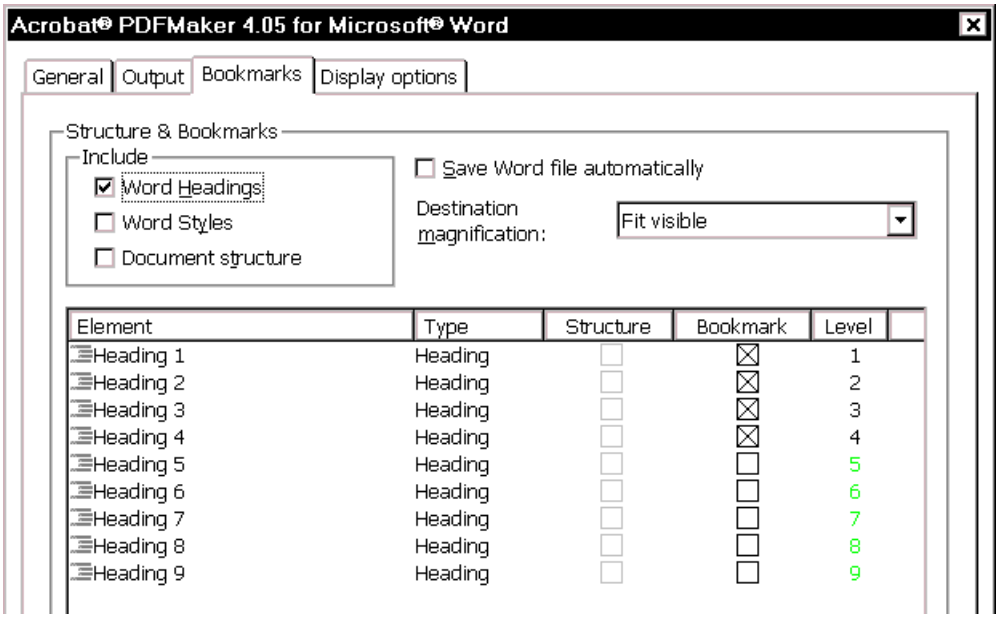

Figure 80. Choosing heading levels for PDF bookmarks

5. On the **Display options** tab (Figure 81), choose the appearance of links and the way you want the document to open.

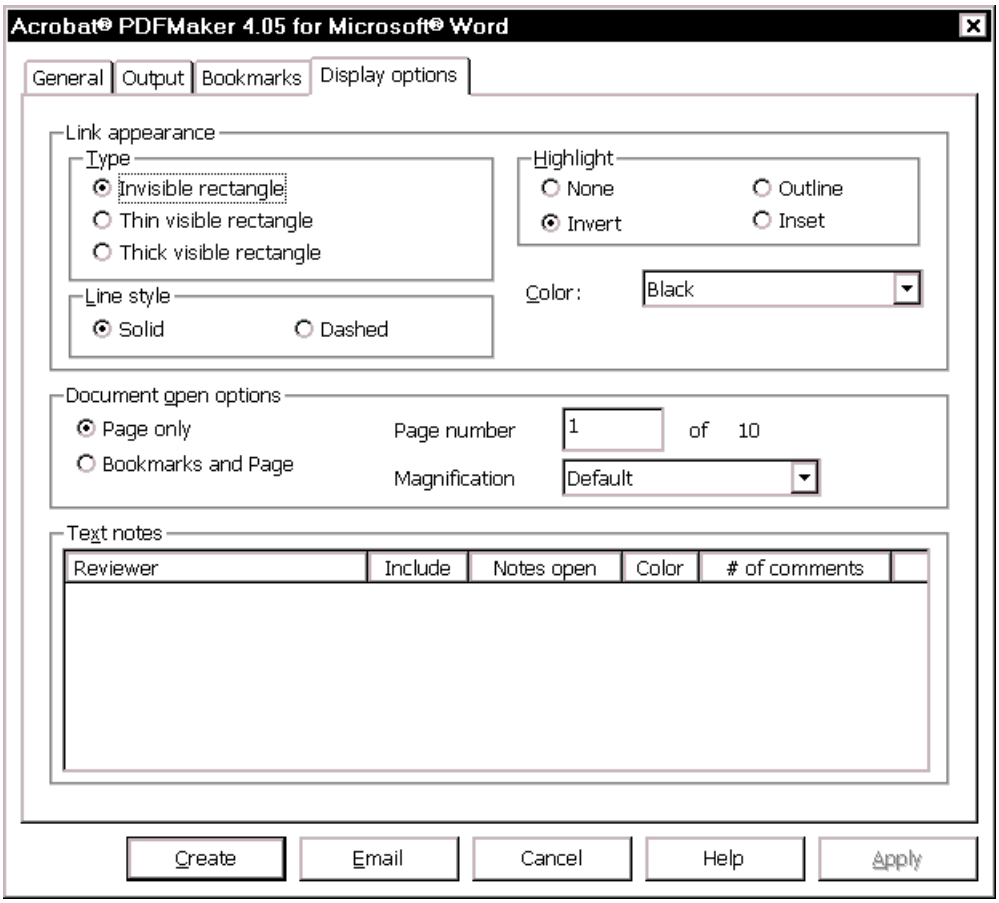

Figure 81. Choosing the appearance of links and the way the document will open

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6. Click **Create**.

The process of creating and distilling a PostScript file will take care of itself. A large file can take quite awhile (up to an hour or more), especially if your computer is underpowered or doesn't have a lot of memory.

If you've chosen to be asked for a file name, the process will stop in the middle until you do that.

I recommend that you don't attempt to use the computer for any other purpose while this process is running. Go to lunch, or attend a meeting, or read a book, or catch up on your filing, but don't touch the computer.

Printing to a PostScript file and distilling

If you prefer to use the manual two-step process to create a PDF, here's how:

1. Make sure you have set up your system as described in "Setting up Acrobat 4" on page 90.
2. In Word, open the document to be distilled into PDF.
3. On the **File** menu, choose **Print**.
4. In the **Printer** section of the Print dialog (Figure 82), select **Acrobat Distiller** from the **Printer Name** list, select the **Print to file** checkbox, then click **OK**.

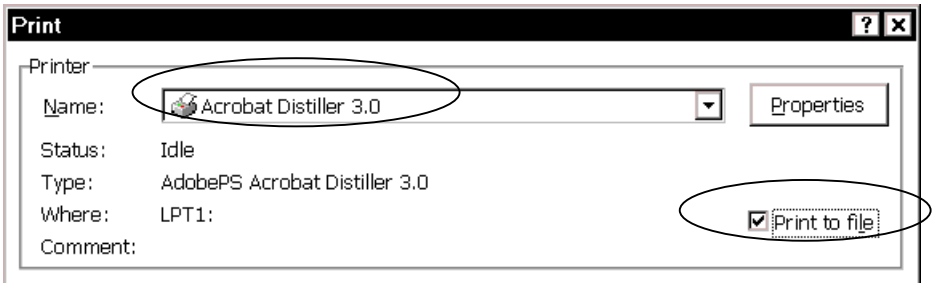

Figure 82. Selecting Acrobat Distiller and Print to file

5. On the Print to File dialog (not shown), select **All Files (*.*)** from the **Save as Type** list, choose the folder where you want to store the PostScript file, type a filename with the **.PS** extension (not .PRN, as some programs insert automatically), then click **OK**.

   The PostScript file is created and stored in the folder you selected. If you have a long, complicated document, this process could take a while.
6. Open Acrobat Distiller (Figure 77). From the Job options list, choose the one you want.
7. On the **File** menu, click **Open**. Find and select the PostScript file you just created.
8. Choose **PDF Files (*.PDF)** on the **Save as type** list, make sure the filename and the folder shown are the ones you want, then click **Save**. Acrobat Distiller creates a PDF file and saves it in the selected folder. If you have a long, complicated document, this process could take a while.

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Using alternatives to Adobe Acrobat

Adobe offers a service to convert certain types of files to PDF through your browser. (You can also receive the results by e-mail.) Check the details of the service at:

`http://createpdf.adobe.com/`

You can register for a free trial. If it suits you, you can sign up for unlimited file processing for a monthly or annual fee.

Links to other resources, including some free ones, are given in this article:

`http://www.webtools.com/story/graphics/TLS20000516S0003`

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Appendix A
For more information

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

Books (printed)

Adobe Development Team, *Adobe Acrobat 4.0 Classroom in a book*, Adobe Press, 1999, ISBN 1568304765.

Bott, Ed and Leonhard, Woody, *Special Edition Using Microsoft Office 2000*, Que, 1999, ISBN 0789718421. Excellent introduction to Word, Excel, Outlook, PowerPoint, Access, Publisher, FrontPage, and PhotoDraw, and how they all fit together, written at an intermediate to advanced level. Comes with a CD containing, among other things, Woody's Office Power Pack (WOPR) 2000.

Camarda, Bill, *Special Edition Using Microsoft Word 2000*, Que, 1999, ISBN 0789718529. Includes a lot more intermediate to advanced detail than could fit into a book on Office 2000.

Leonhard, Woody, *Woody Leonard teaches Office 97*, Que, 1998, ISBN 0789717050

Leonhard, Woody, Hedspeth, Lee and Lee, T.J., *Word 97 annoyances*, O'Reilly & Associates, Inc., 1997, ISBN 1565923081. A great collection of tips on how to get Word 97 working the way you want, as much as possible.

Electronic (Web sites, e-mailed newsletters)

Web sites and their addresses change frequently, often without warning or redirection to their new location. This list was up to date in February 2001.

Adobe user forums: http://www.adobe.com/supportservice/custsupport/forums.html

Adobe's service to convert certain types of files to PDF through your browser is here: http://createpdf.adobe.com/

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/

Blue World Communications, http://www.blueworld.com/, has discussion lists. For information about the Adobe Acrobat list, go to http://www.blueworld.com/blueworld/lists/acrobat.html

Clarke, Cathy and Brown, Ron, “Word can do it,” is a discussion about referenced documents, sequence numbers, field codes, and how to make them all work. Institute of Scientific and Technical Communicators (ISTC), http://www.istc.org.uk/wordcan.htm

Knopf, David, “Autonumbering with RoboHELP and Microsoft Word,” http://www.knopf.com/tips/autonumber.htm

Microsoft's Office Update site, for free downloads, including patches, file viewers and converters. http://officeupdate.microsoft.com/welcome/word.asp

PDFzone has discussion lists, resources, and links to other information about creating and using Adobe's PDF (Portable Document Format) files. http://www.pdfzone.com/resources/tips/tipsfull.asp

Links to other resources for creating PDFs, including some free ones, are given in this article: http://www.webtools.com/story/graphics/TLS20000516S0003

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

Woody's Office Watch is a free weekly e-mailed newsletter from Woody Leonhard. It covers the entire Microsoft Office 97 suite. http://www.woodyswatch.com/
To subscribe, send a message to <wow@woodyswatch.com>.

Word-PC discussion list. Send e-mail with the message "Subscribe" to <listserv@listserv.liv.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, send a blank e-mail to <join-wordtips@lists.lyris.net>. Wyatt's website (http://www.VitalNews.com/) includes other relevant resources.

Graphic tools

These are just a few of the many screen capture and graphics tools available.

Adobe Photoshop and other Adobe products. Designed for professional graphic artists and other people who create many graphic materials and who need color separations and other advanced techniques. Many documents do not need the power of these products. You may find that a less full-featured and less expensive tool will do everything you need. http://www.adobe.com/

Hijaak Pro. Screen capture, graphic file conversion and organization, image editing, batch processing. Many features. Non-pro version also available. http://www.imsisoft.com/

Paint Shop Pro. The choice of many technical communicators. Captures screens and does most graphics creation and editing tasks. Imports and exports a wide range of graphic formats. http://www.jasc.com/

Palette Express. Creates a single, highly optimized palette (color table) based upon the various palettes used in multiple images. Dithers images to smaller palettes in order to reduce file sizes, without degrading image quality. Batch converts among .BMP, .GIF, and .JPEG formats. http://www.risoftsystems.com/palexp.asp

SnagIt. Captures Windows screens, optionally including the mouse cursor; on-screen activity, including mouse movements, as a standard AVI video file; images or text from vertical scrolling windows; entire Web pages as a single image; DOS program screens that run under Windows. Supports numerous graphic formats; creates interlaced GIF and progressive JPEG. http://www.techsmith.com/

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Appendix B
Glossary

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/index.html), 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. Similar to Adobe FrameMaker's user-defined variables.

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

browser (also called Web browser). *n.* An application that enables a user to view HTML documents on the World Wide Web, on another network, or on the user's computer; follow the hyperlinks among them; and transfer files. In addition, most current browsers can display graphics and video files, play audio files, and permit users to send and receive e-mail and to read and respond to newsgroups.

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.

electronic publishing. *n.* Distributing information via electronic media, such as communications networks or CD-ROM, or by placing the material on a Web site.

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.* A space in an on-screen form or dialog where the user can enter a specific item of information.

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.

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.

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GIF (Graphics Interchange Format). *n.* A graphics file format used for transmitting images on the Internet. *Compare* JPEG, PNG, TIFF.

GUI (Graphical User Interface). *n.* A type of environment that represents programs, files, and options by means of icons, menus, and dialog boxes on the screen. The user can select and activate these options by pointing and clicking with a mouse or, often, with the keyboard.

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.

insertion point. *n.* In graphical user interfaces, a blinking vertical bar that marks the location at which inserted text will appear. *See also* cursor.

Internet. *n.* The worldwide collection of networks and gateways that communicate with one another; based on high-speed data communication lines that route data and messages between computers.

intranet. *n.* A network designed for information processing within a company or organization; used for document distribution, software distribution, access to databases, and training. An intranet usually employs applications associated with the Internet, such as Web pages, Web browsers, FTP sites, e-mail, newsgroups, and mailing lists, accessible only to those within the organization.

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.

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.

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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.

PostScript. *n.* A page-description language from Adobe Systems that offers flexible font capability and high-quality graphics.

printer driver. *n.* A software program designed to enable other programs to work with a particular printer.

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.

screentips. *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.

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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.

SGML (Standard Generalized Markup Language). *n.* An information management standard adopted by the International Organization for Standardization (ISO) in 1986 as a means of providing platform- and application-independent documents that retain formatting, indexing, and linked information. SGML provides a mechanism for users to define the structure of their documents and the tags they will use to denote the structure in individual documents.

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 oause 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.

Web browser. *n. See* browser.

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.

World Wide Web. *n.* The total set of interlinked hypertext documents residing on Web servers all around the world.

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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This page is for your notes.

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