workshop

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Advanced Word

tips & tricks

Word is not just for writing reports, emails and letters. Its advanced formatting features and navigation aids make it ideal for lengthier files such as a book or thesis. Simon Williams shows you how to use the program's long document features to best effect

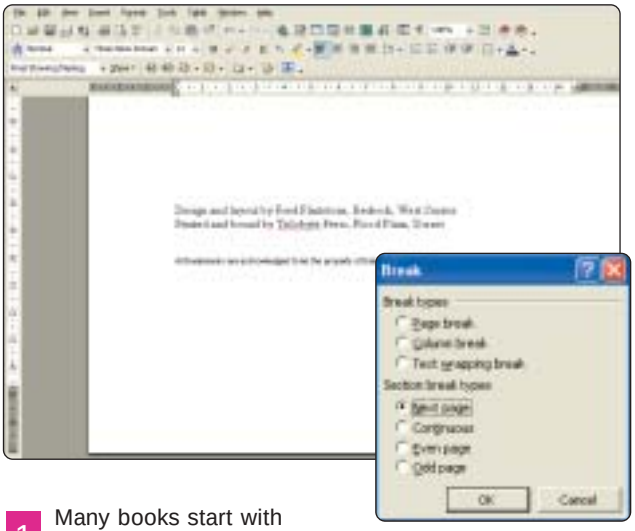
Word is a versatile program that can be used to create informal letters and the like, but it comes into its own when creating and editing longer, more complicated documents such as reports, theses or manuscripts. It provides plenty of features that will speed things up considerably – for example, handling the structure of your document, its division into chapters, contents, index and glossary.

But it's not just about using tools to ensure your work is easy to navigate. As your document gets longer, it's important to be strict about your writing. Think about dividing it into several files, perhaps one per chapter, with extras for preliminaries and concluding parts. You'll find it much easier to keep control if you use a series of linked files rather than one big one. You should also plan for things such as tables of contents, references, an index and perhaps footnotes before you start.

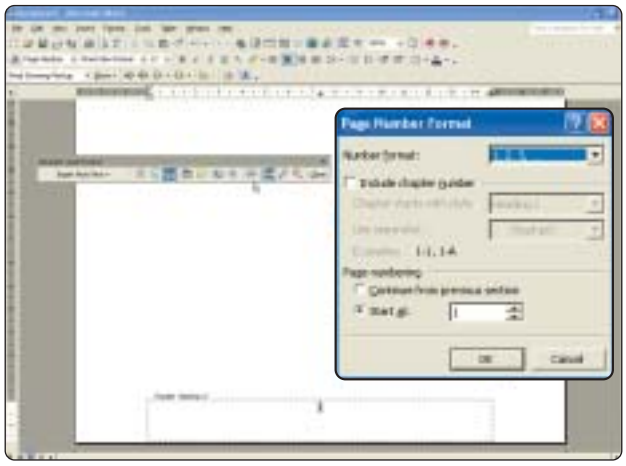
Here, we're going to work through the main elements of the longer document, showing how Word can help with the construction of each. We'll start with a table of contents and finish off with indexing, peer review options and ways of publishing your finished work.

ILLUSTRATION: JESS WILLIAMS

Start numbering after page one



1 Many books start with unnumbered pages that contain information such as the title and contents. Numbering usually starts at the beginning of chapter one. Use a section break to start page numbering some way into your document. Create as many unnumbered pages as you want then insert a section break by clicking Insert, Break, Next page



2 On the first page of the new section select View, Header and Footer. Click on the toolbar to swap between header and footer so you can see the footer area of the page. Click the icon to insert a page number and format it as you desire. Select Format Page Number, choose the Start at radio button and enter '1'. Click ok and finally click the Same as Previous icon in the header and footer toolbar to turn it off

Presenting the contents

Word automatically generates a table of contents using paragraph styles from the existing template or indent levels from the outliner. Paragraph styles is the easier method, particularly if you don't use the outliner to structure your document.

By default, Word recognises any text in the Heading 1 style as a main entry in its table of contents and any in Heading 2 as a sub-entry. As long as you're consistent with your heading and subheading styles, simply click Insert, Reference, Index then Tables, Table of Contents. Select ok to create a basic table of contents. Note that in pre-Word 2002 versions you'll need to select Insert, Index then Tables.

If you don't want to use the default style names, click Options on the Table of Contents tab. From here you can choose other paragraph styles or create your own. You can also select different layouts for your table of contents and opt for items such as tab leaders, too.

If you make changes to your document that affect the number or position of your headings you can automatically update the table of contents using the button on the Outlining toolbar.

Using chapters to impose a structure

It would be very difficult to read a book, particularly a factual one, if it had no chapters and was one continuous piece of text. It's much easier for the reader if the subject is broken down into manageable chunks, usually on a topic-by-topic basis. While you can use section breaks to identify different chapters in a document, it's often easier to work with Word's master document structure.

A master document is simply an outline where each item in the list becomes a separate file or subdocument. Switch to Outline view using the View, Outline option. Type in your chapter headings in level 2 of the outline, select each one and click on Create Sub-document in the Outline toolbar. The display changes from a single line of the outline to the filename of the subdocument in which it's held.

When you come to save the master document, Word automatically saves all the subdocuments under their chapter names. Once you have constructed your master document and its subdocuments you can save a lot of time by applying formats at the master level and having them automatically filter down through all your subdocuments. It's best to save all the files together in a separate folder so that all the subdocuments are held in one place. If you need to delete one of the subdocuments, do it from within the master document rather than simply deleting the file under Windows.

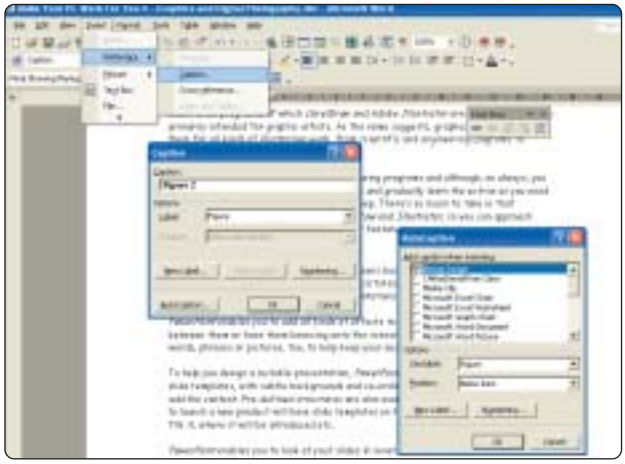
Footnotes and endnotes

Many technical documents require footnotes that provide additional information about words or phrases mentioned in the main text. They are normally reproduced in a smaller font size than the body copy. If they occur at the end of each page they're called footnotes; if they're left to the end of a chapter they're endnotes.

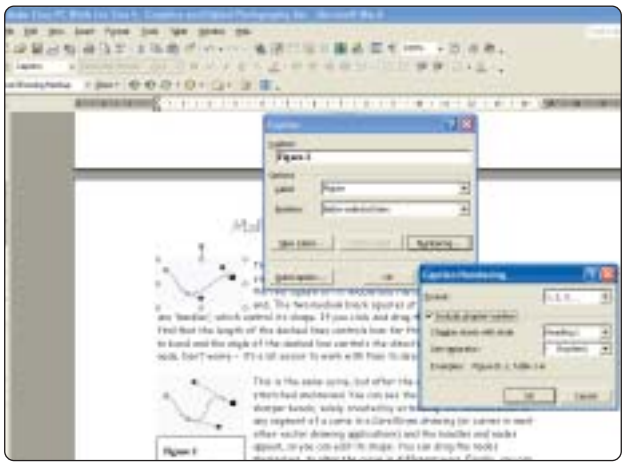
Simply position the cursor where you want the footnote marker to be applied and select Insert, Reference, Footnote. The Footnote and Endnote dialog box lets you place notes at the bottom of the page or at the end of the documents. It can be formatted as numbers, letters, Roman numerals or punctuation marks.

Once the footnote is inserted, Word adds a small horizontal line at the bottom

Adding picture captions and credits



1 The best way to add captions to your document's tables, diagrams and photos is to switch on AutoCaption before you start your document. Select Insert, Reference, Caption, click on AutoCaption and choose the types of object you want to be automatically captioned. Each time you insert an object of your selected types, Word automatically creates a caption header to which you can add your own text



2 To add captions after you've inserted objects, select each object in turn and click Insert, Reference, Caption. Word will renumber all succeeding captions if you add a new one between existing captioned objects. Use a consistent paragraph style for your document's chapter numbers, such as Heading 1, then Word can include the chapter number automatically in its caption numbers. Select Numbering, Include chapter number from the Caption dialog box

of the page and provides a corresponding marker to which you can add your footnote. As you add footnotes, the program will 'raise the bar' to try and keep the footnotes on the same page as their markers. If you insert extra footnotes or delete existing ones, succeeding notes are renumbered automatically.

Academic and scientific papers often need to refer readers to other studies and papers. A table of references is an ideal task for endnotes. If you number all your references sequentially and put the list at the end of your document, you won't have to worry about tying in the numbers to their reference entries by hand.

Word can also construct a table of authorities – citations of other relevant cases in legal documents. To find out more about this specialist tool, refer to the Help menu.

Adding a glossary or index

Word has no glossary creation tools so you need to treat the glossary as a chapter in its own right and put it together in the same way as any other. You may find it helpful to create a paragraph style specific to glossary entries so you can make the terms stand out from the rest of the text. If the glossary chapter is included as a subdocument in the master document, it will be indexed like any other.

Most lengthy documents require an index which lists prominent words and phrases and the page numbers on which they appear. Word can generate an index automatically from vocabulary that you highlight in your document.

To mark a word for indexing, press Alt, Shift, X. This pulls up the Mark Index Entry dialog box which stays open so you can mark multiple entries. The main index entry is taken from the word or phrase you highlighted, but you have the option to enter a second sub-entry. You can enter a third level by typing a colon at the end of the sub-entry followed by the text.

The Mark Index Entry dialog box also include a cross reference option. Type the destination of the cross reference after the word See to mark all occurrences of your selected word for inclusion in the index.

Click Mark in the dialog box and Word creates a field code consisting of the letters XE and the Index entry in speech marks, all enclosed in brackets. These field codes are used extensively by Word and do not print. Click on Show, Hide in the Standard toolbar to conceal them from view.

Having marked the text you want to index, select Insert, Reference, Index and Tables, Index. This previews your index, gives you options to right-align page numbers and lets you choose how many columns you need. Click ok to create the index at the current cursor position.

To index across multiple documents, set up a master document from the start and use subdocuments for each of the chapters. When it comes to indexing open the master document, expand all levels of the outline and perform an automatic index build. This will index all entries in the master and all its subdocuments.

Highlighting changes and editing marks

Checking and editing any document can be a convoluted process, particularly if it needs to be read by more than one person and runs to a lot of pages. Word tries to help with this by providing markup facilities through its Reviewing toolbar. Turn this on by selecting View, Toolbars, Reviewing then

Page breaks and break options

If you're unaccustomed to such structured word processing you may think the best way to force a new document section, whether it's chapter, subsection or paragraph, is using the Return key. It's not. Every time an edit is made that changes the length of the preceding text, the break is in the wrong place.

Use page, column or section breaks from the Insert, Break dialog box. This way, if you force a new page, it will stay a new page no matter how much text there is in the preceding one. You can even force a new section to start on a left- or righthand page. Select Format, Paragraph, Line and Page Breaks. This dialog box enables you to keep lines of a paragraph together, control widows and orphans and force a break before a given paragraph.

click on Track Changes. Any text you then type is, by default, coloured red and underlined. Lines that include changes have a vertical bar inserted in their lefthand margin for easy identification. You can add comments by clicking the Insert Comment button, again in the Reviewing toolbar. The point at which the comment is inserted is highlighted in yellow and the comment itself can be read and edited using the Edit Comment button.

If you need to send copies to several reviewers for markup and comment, first make sure the document is in its final state. If you have several versions of it save the latest as a new file. Before sending out this final copy, go to Tools, Protect Document and choose either to allow only comments or comments and tracked changes. Tracked changes can be easily identified so you can accept or reject them.

When the revised documents are returned, create a single document by selecting Tools, Merge Documents. Word combines the documents and recolours the comments from different reviewers. You can then browse through and accept or reject each change in turn, noting any comments and responding as necessary.

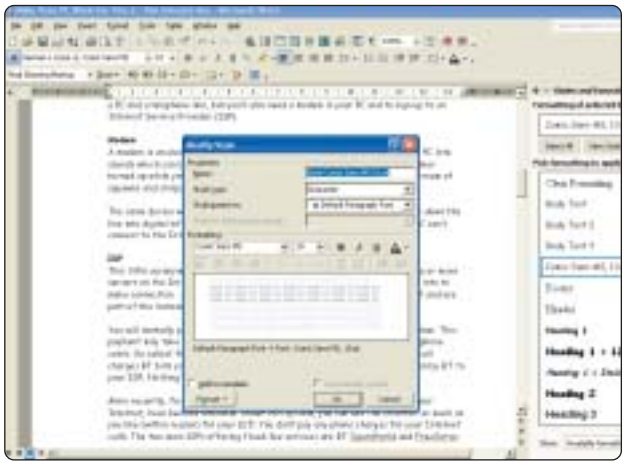
Publishing and protecting your work

Once your reviewed-and-revised document is written, has its table of contents, index and glossary, it's time to publish it. Protect it by adding a copyright notice – a copyright symbol, the date of publication and your name as author.

If you're publishing your work as a Word document protect it with a password. Click File, Save As, Tools, Security Options then define separate passwords for opening and modifying any file. You could also turn it into a PDF file which means it will be universally readable but no longer an editable document.

When saving a file for distribution, consider its format. The standard DOC format should ensure it can be read by anyone else using the same word processor. If you want something more egalitarian, choose the RTF format. This is widely compatible with a range of word processors but may not cope with Word's more esoteric formatting functions. A third choice would be HTML, which would make the document readable by anybody with a web browser, but again complex formatting may suffer. ■

Reveal formatting



1 In a document with complex formatting it's important to maintain consistency. It can look tacky if the size and style of your headings and subheadings, captions, footnotes or body copy varies between sections. The best way to ensure this is to define and use named paragraph styles, using the Format, Styles and Formatting option

2 When you've finished creating your document, additional help is available from Word 2002 and later using the Format, Reveal Formatting option. It shows details of font, paragraph and section settings and can compare one section with another. With Mark formatting inconsistencies switched on in Tools, Options, Edit, Word spots formatting problems and underlines them with a blue wavy line