Word Wizardry

Time-Saving and Troubleshooting in MS Word

By Jessica Dumas

The Butterfly Connection

Topics for Discussion

- Magic Time-Saver Formulas
  - Template Tricks
  - Fast-forward with Fields
  - Manage Time with Mail Merge
  - A Touch of Style
  - Magic of Macros
  - Form Formulas
- Magician's Troubleshooting Tips

Template Tricks

What is a Template?

- A pattern or boilerplate used to create other documents with a similar design or function
- A "true" template has the file extension ".dot"
- Templates are stored in Word's templates directory so you can access them easily by going to File, New
- Templates promote the development of high quality documents by
  - Reducing time in creating documents or changing formats
  - Ensuring consistency in format and layout
  - Significantly reducing cost by using instead of preprinted forms
- We use templates almost every day of our life
  - Proposals and reports
  - Newsletters and brochures
  - Memos and fax sheets
  - Invoices, employee records, forms, resumes

What's in a Template?

- A template can contain anything a document does but is more functional – some typical items are:
  - Styles for headings, bullets, body text, headers, footers, footnotes, etc.
  - Graphics such as logos & cover designs
  - Page and paper layouts
  - AutoText entries
  - Predefined or custom macros
  - Custom menus, commands or toolbars
  - Shortcut keys
  - Fields

Understanding Word's Templates

- Word's default template is called "Normal.dot"
  - It contains the formatting and default settings available when you choose File, New
  - Holds all styles, toolbars & AutoText, macros for all active documents – all new templates are based on it
  - Thus, it is considered the "global" template
- Get familiar with where templates are stored or make a shortcut to the templates folder
  - They may be stored in different locations depending on what version of Windows you are using
  - Because many viruses are designed to attack Word's default template, you need to safeguard it by making it read-only (with Word closed, locate normal.dot file & right click on it, go to Properties & check read-only box)
  - Make a back-up copy & store somewhere other than your C drive (diskette or your network user drive)

Tip: An indispensable tool which backs up all Office templates and option preferences/settings which can be used to restore or match PCs can be downloaded from Microsoft free, called the Profile Wizard included in the **Office Resource Kit core tool set.**

First Step…Plan your Template

- Determine what the objectives of this template are – what is it's purpose?
  - Is it client specific or generic?
  - Who will be using it?
  - Are you starting from scratch or a draft?
  - Is there a certain color scheme you want?
  - Is there another template or document that has styles in it you would like to use in this one – do you want all of it's styles or just a few?
- How automated do you want your template?
  - Should it have a TOC?
  - What AutoText entries could you add?
  - Do you want to prompt user for information?

Template Options

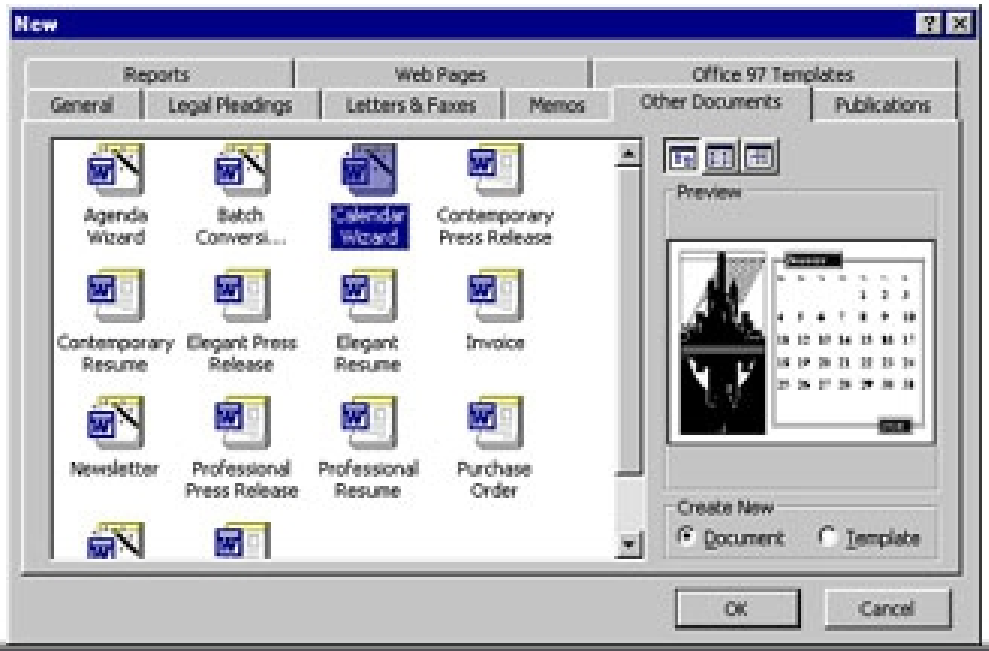
- Once you have an idea of what type of template you want and what needs modifying, make your selection from several available options
- Word's Built-in Templates
  - Word's Built-in Wizards
  - Create template based on existing template
  - Create template based on existing document
  - Applying another template's styles to existing document
  - Automated prompting templates
- The next few slides will discuss all of these options

Using Word's Built-in Templates

- Selecting a built-in template for a new document is the most common way to use a template
  - Go to File, New
  - Select from a variety of template types in 3 main categories: contemporary, elegant and professional, using similar design principles

Using Word's Built-in Wizards

- Select a Wizard the same way (File, New)
  - Agendas, calendars, newsletters
- Wizards are similar to templates but have prompts asking for information
- You can create your own wizard with WordBasic



Create Template Based on Existing Template

- Choose File, New, and click the template button
- Choose the Tab that contains the template you wish to modify, select the template, and click OK
- Change the layout and formatting of the template, make any other changes you want
- Go to File, Save as,
- Enter a file name and say OK

Note: If you change a template and preserve the original name the original template is replaced

Create Template Based on Existing Document

- Format document to your satisfaction by adding/changing styles, AutoText entries, macros
- Go to: File, Save As (or F12) & choose "Document Template (*.dot)" in the Save As Type - Word should point you to the template folder
- Name the template & click Save

Note: You can change a template from within a document by going to Format, Styles. You can modify the styles in the document and check the Add to Template box.

Applying Another Template's Styles to Existing Document

- In lieu of spending hours reformatting a document, you can copy and apply styles from another template to your document
  - Open document you want to reformat
  - Go to: Tools, Templates and Add-ins
  - Check "Automatically update document styles" box
  - Click Attach & browse to find the template you want
  - Click Open & OK, OK
  - Do a final proofing & save
- You can do the same by using the Organizer

Ingredients for an Automated Prompting Template

- The use of fields
- Fill-in fields
- Creating Bookmarks
- Nested fields

Note: Demonstration of automated prompting LOE template

Fast-Forward with Fields

What are Fields?

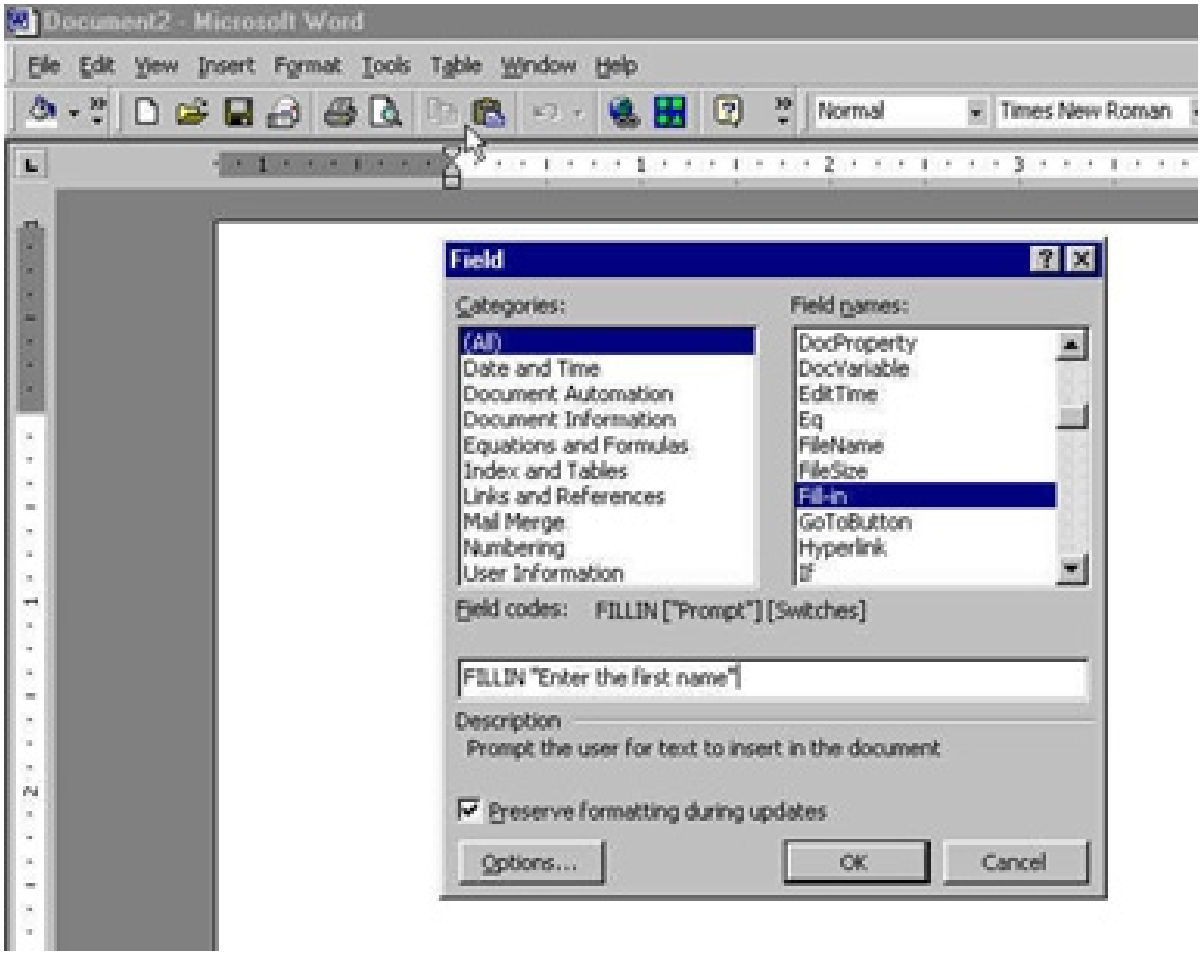
- Types of Fields
  - Result fields are fields that produce a visible result, e.g. author, date, and fillin field
  - Action Fields are codes that perform an action but do not insert text, e.g. ask, go to, and macrobutton fields
  - Marker fields mark a location in the document, like a placeholder or bookmark e.g. set, or ref
- Parts of a field
  - Field characters
  - Field type
  - Field instructions
    - Field Arguments
- Nested Fields

Creating a Field

- Insert field by selecting from the menu
  - Insert, Field, select type of field from Categories list, then from Field names list
- Insert field manually
  - Ctrl+F9, enter the field name, followed by space and field instructions between the field characters {}
- Updating a field
  - Press F9 or right-click on field and select update
- Deleting a field
  - Select the field and press delete
- Disabling a field
  - Select a field and do a Ctrl+Shift+F11
- Field shortcuts
  - To lock a field press Ctrl+F11, to unlock a field Ctrl+Shift+F11, press F11 to go to next field, Shift+F11 to go to previous field

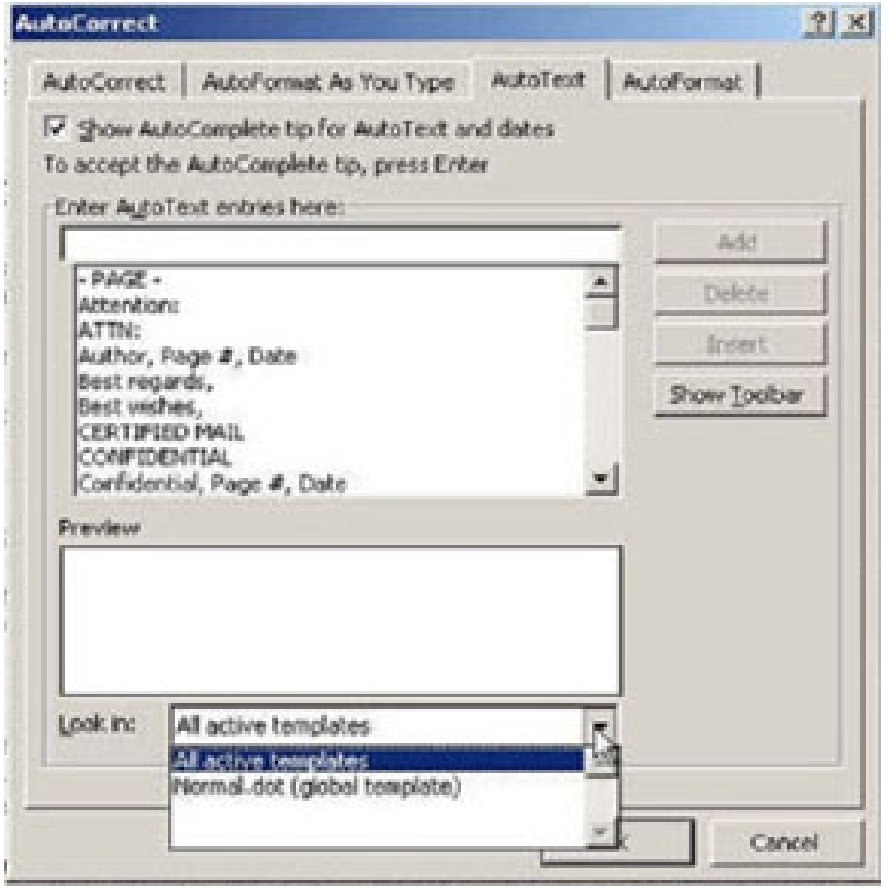
The {fillin} Field

Your best bet for a simple prompting template



AutoText and AutoTextList fields

- Insert AutoText
  - Predefined AutoText submenu, e.g. Attention line, closing line etc.
  - Customized submenus, e.g. signature> Associate, Signature Company>First Co
- Adding AutoText
  - to normal.dot
  - to another template
- Creating AutoText submenus
- Insert AutoTextList



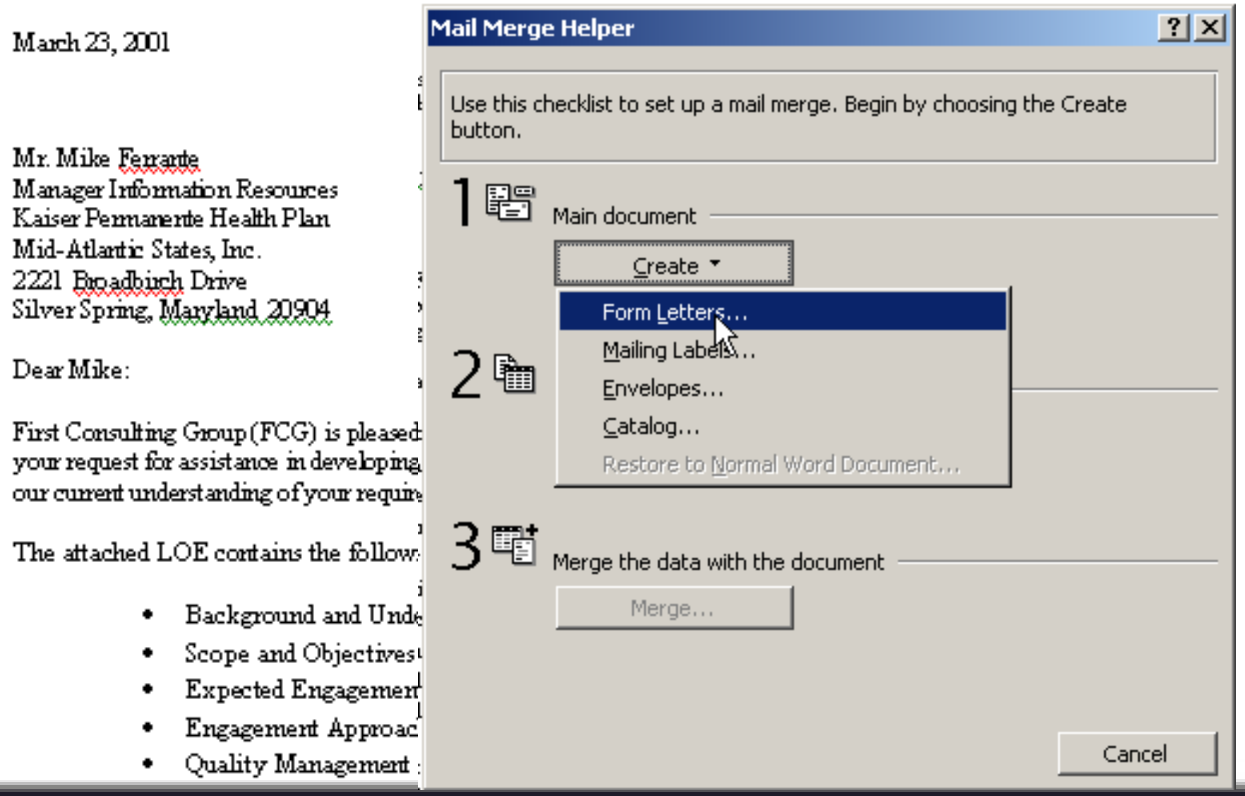
Manage Time with Mail Merge

Merging Mail

- One of the most powerful and time-saving feature in Word that uses fields is mail merge - it lets you create multiple letters or envelopes by merging a list of names and addresses with letters, envelopes, or address labels
- It has two components
  - The Main document – Open or create a main document which contains the generic information to be repeated
  - The Data Source – Open or create a data source, which contains data that varies in the merged documents, e.g. name and address of recipients. It can be a Word table or tabbed document, a spreadsheet or database file, or an a

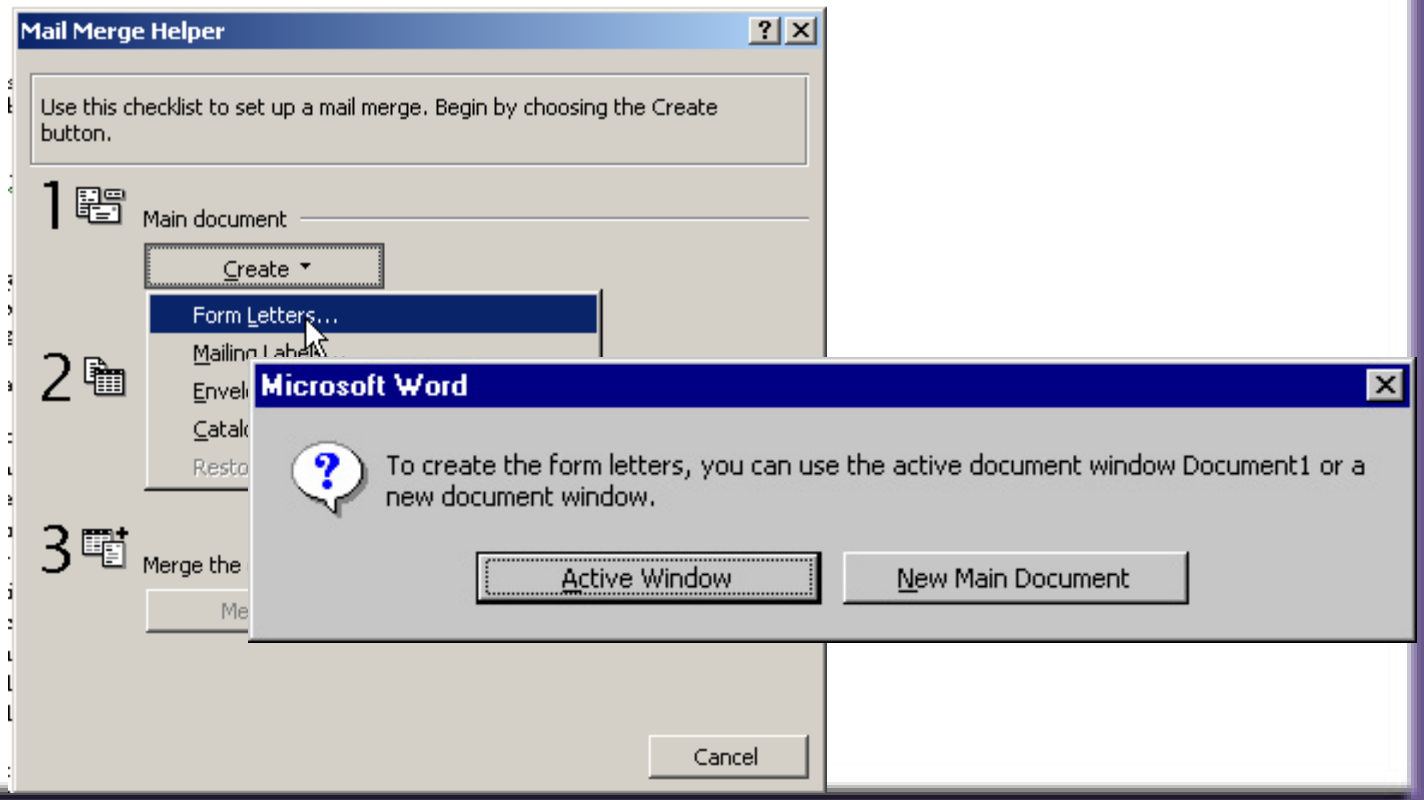
Step 1: The Document

- Open existing document or create a new document
- Choose Tools, Mail Merge
- In the Mail Merge Helper, click Create



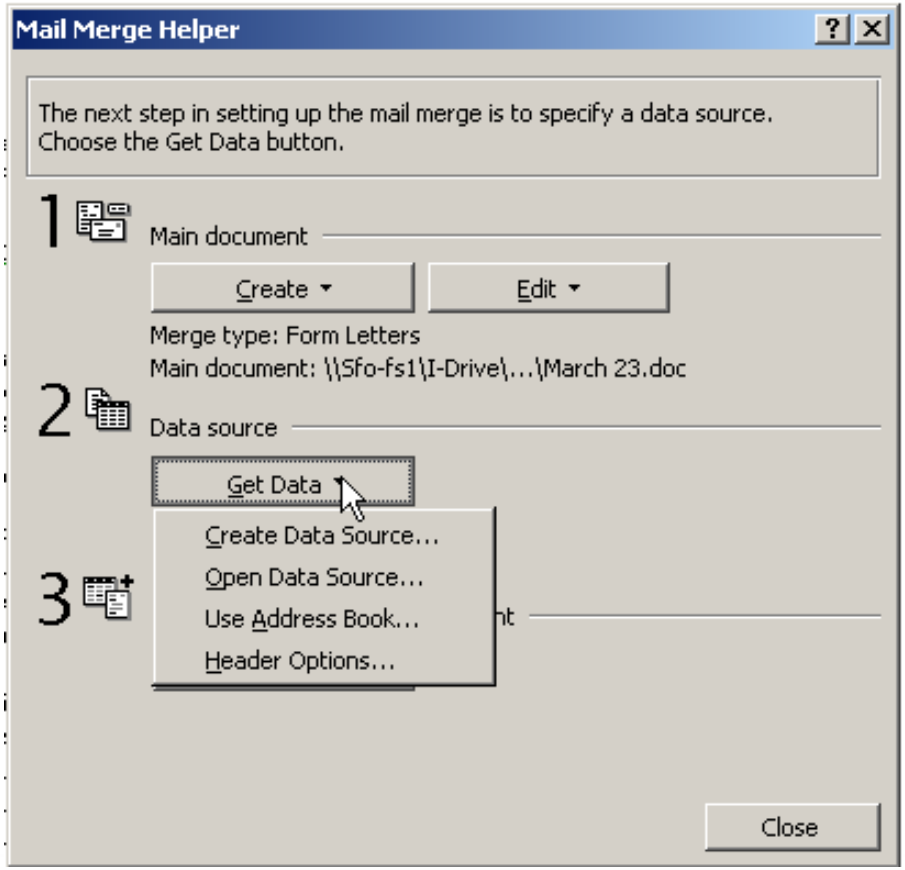
Step 1: The Document cont'd.

- The drop-down list shows 3 alternatives, choose Form letters
- A decision box appears. In this instance we will select Active Window

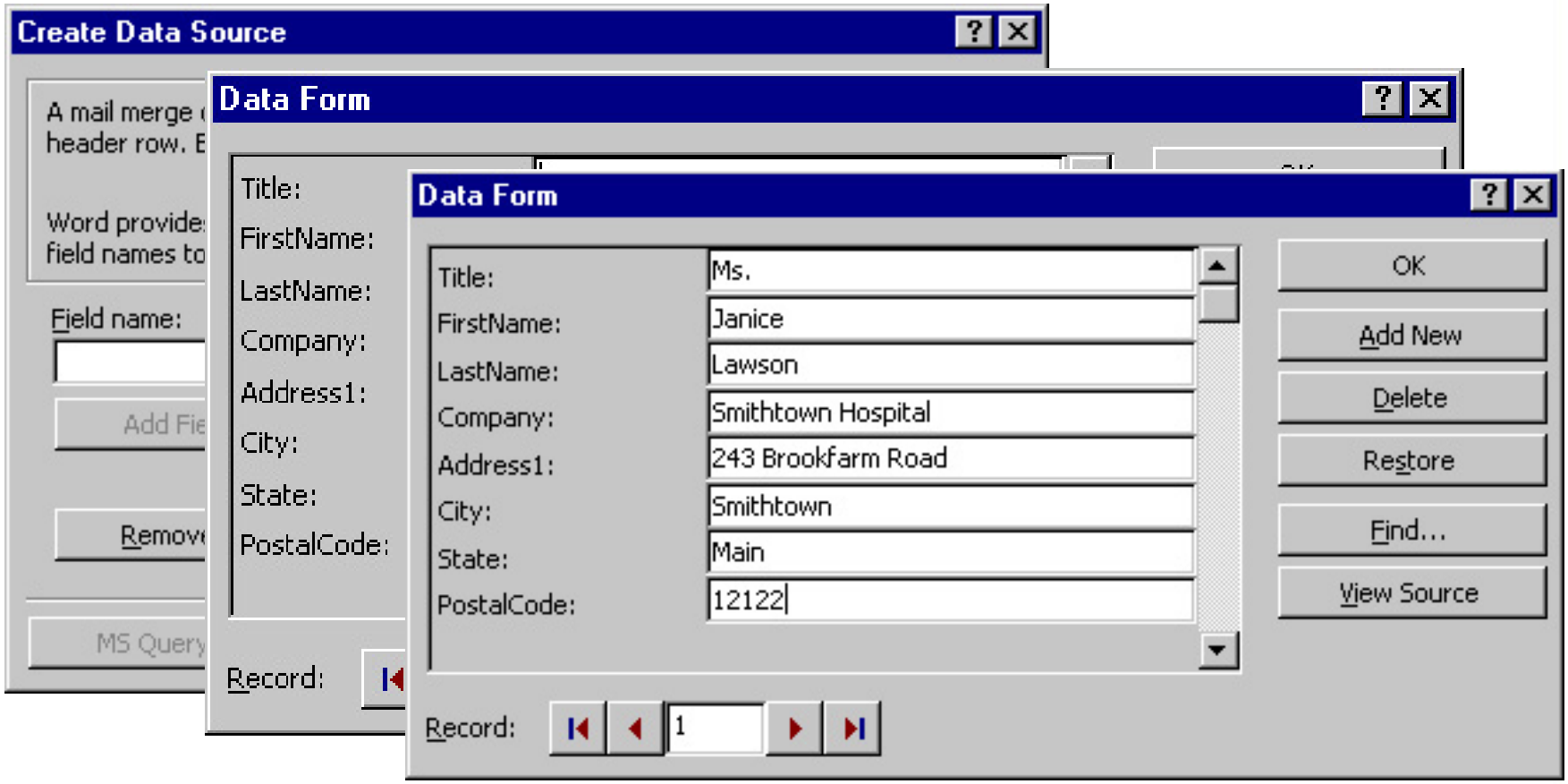


Step 2: The Source

- Under the data source heading click the Get Data button
  - Create data source
  - Open data source
  - Use Address book

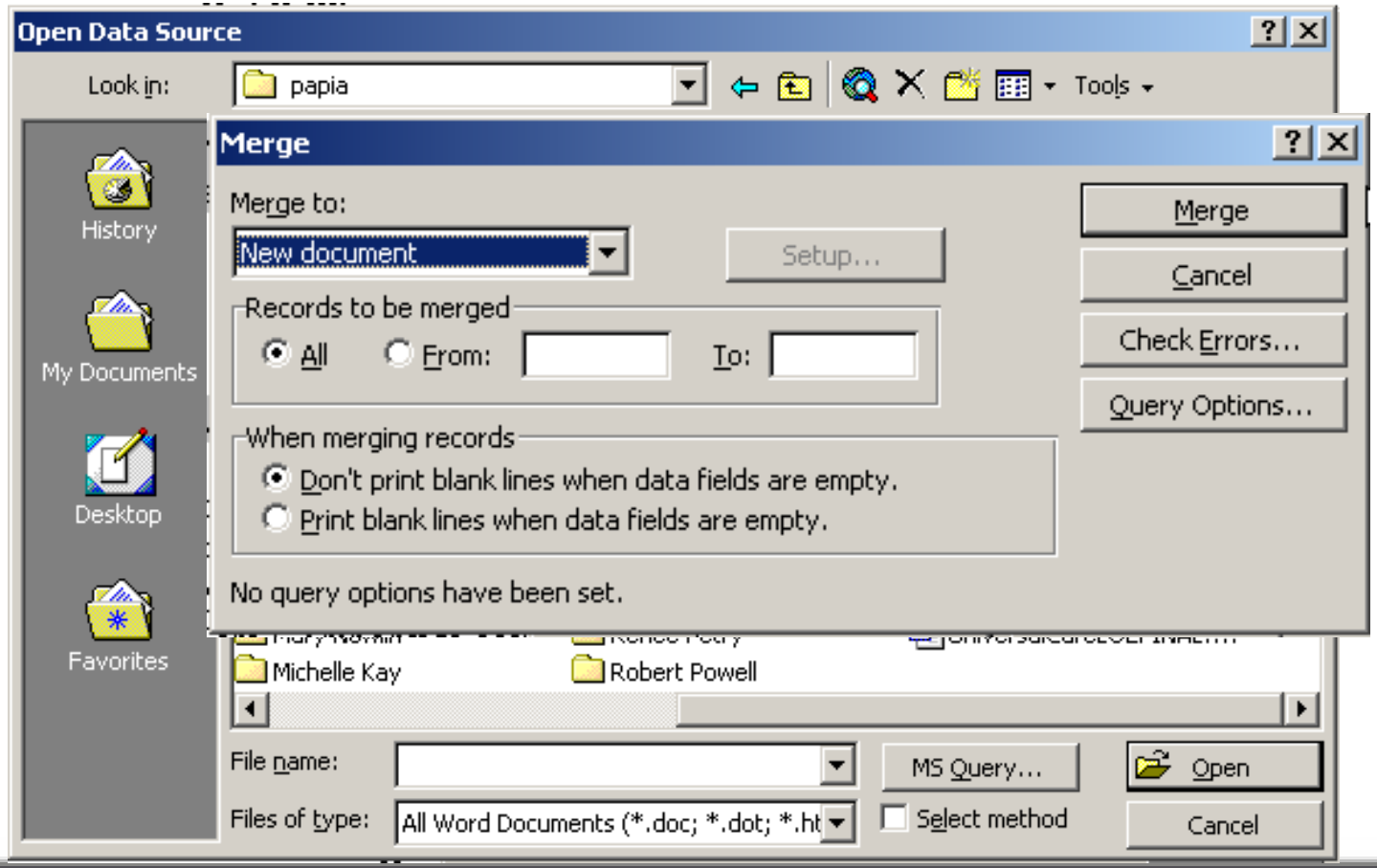


Create a Data Source

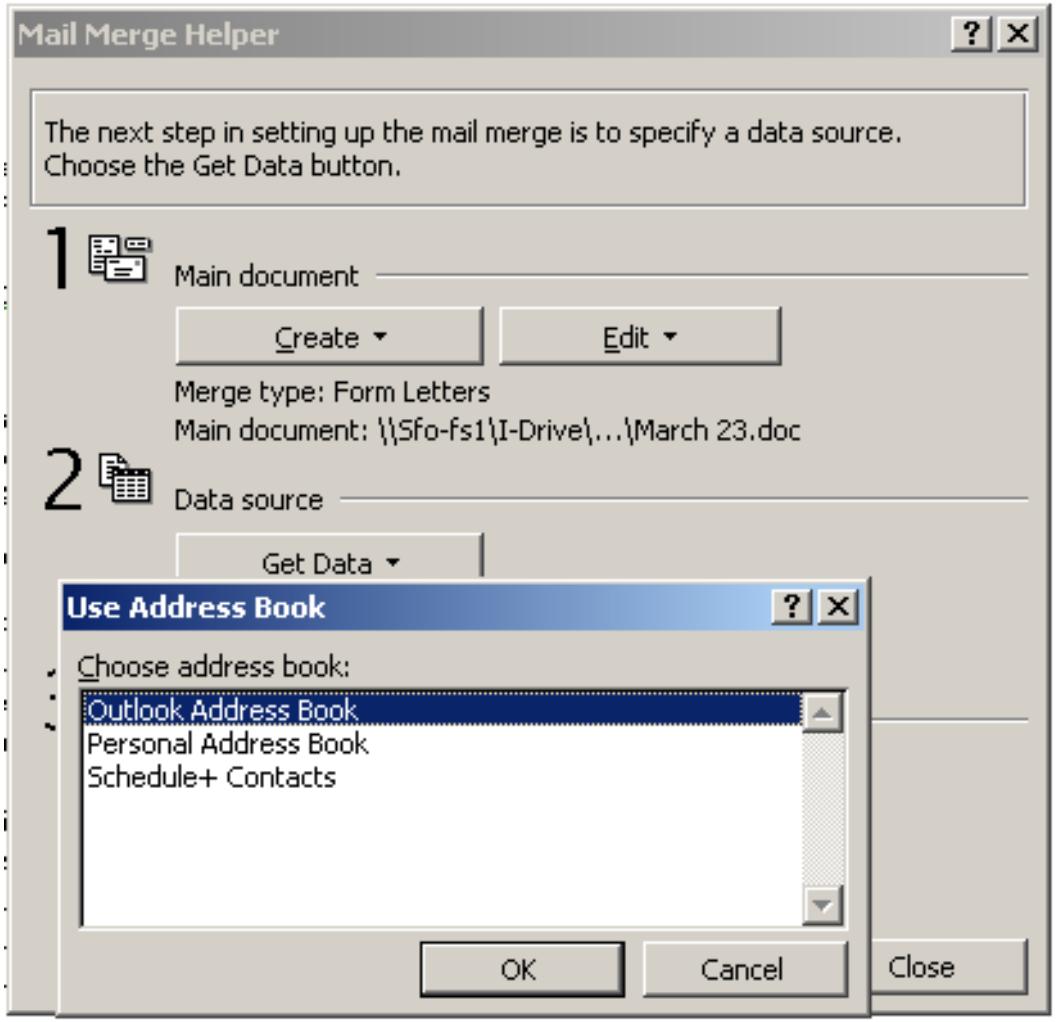


Data from Table, Spreadsheet or a Database

- You can import from Word, Excel, Access, dBase, Paradox, MS FoxPro, WordPerfect, Lotus

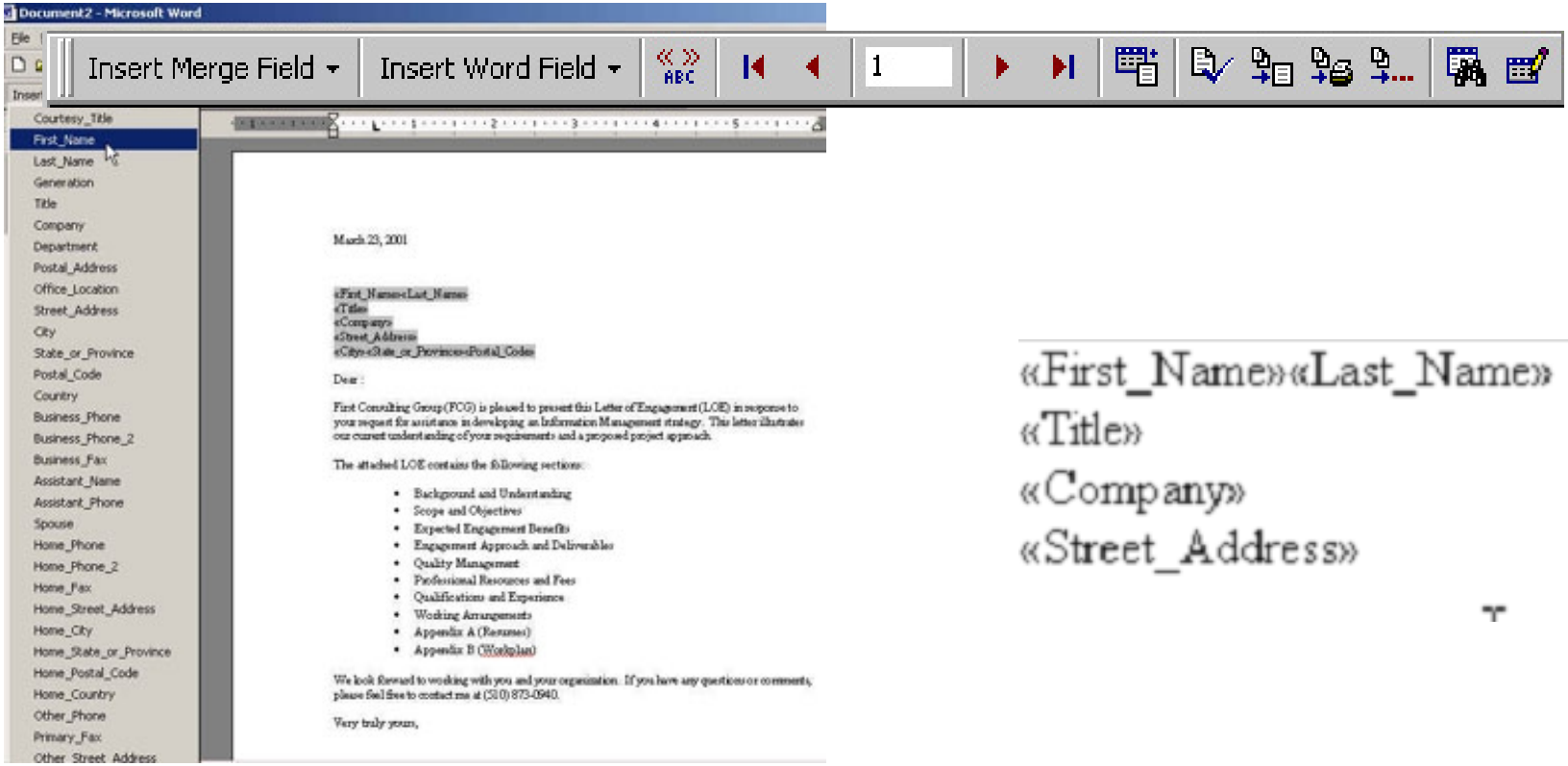


The Personal Address Book



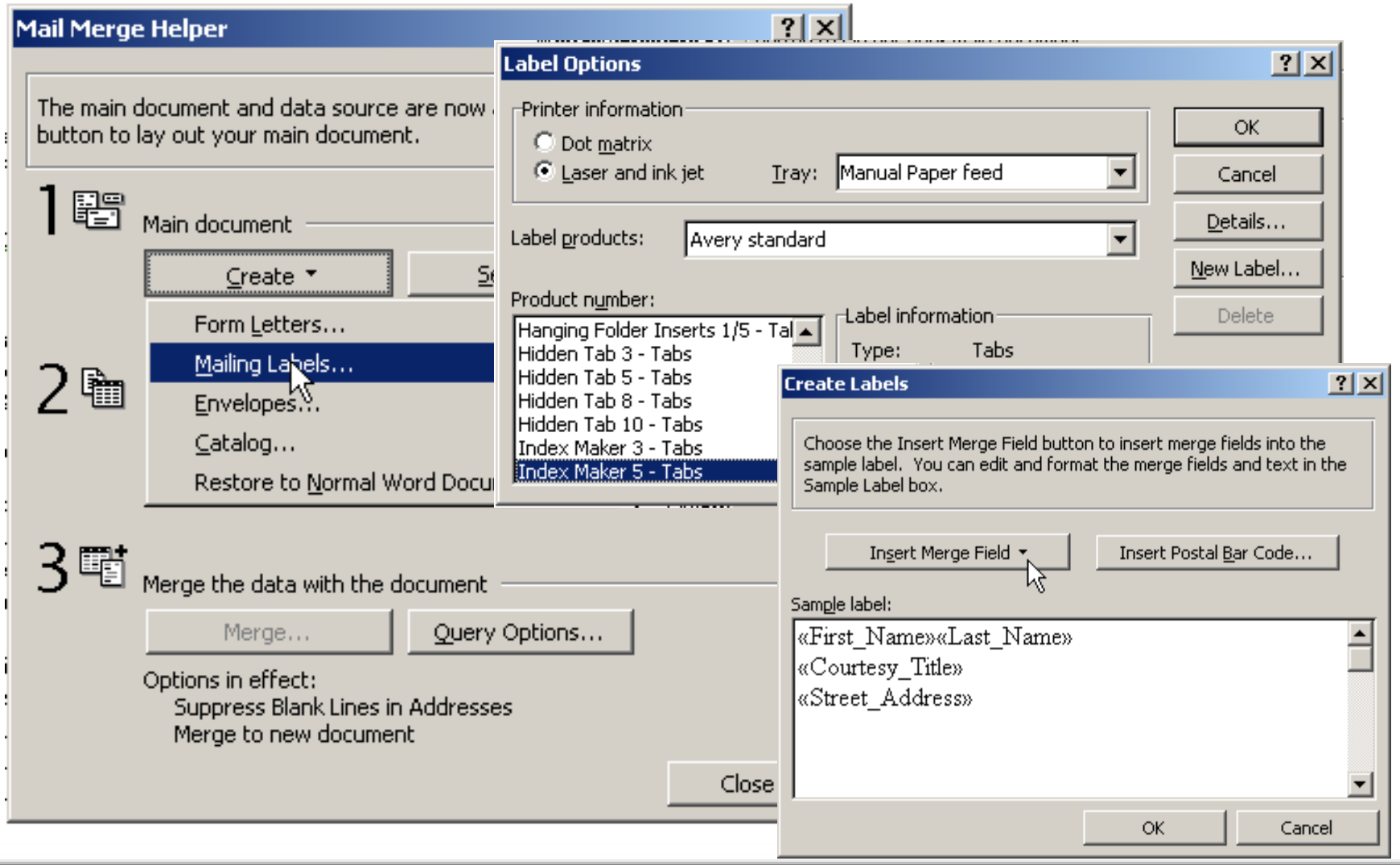
Step 3: Merge Data

- In the main document insert merge fields

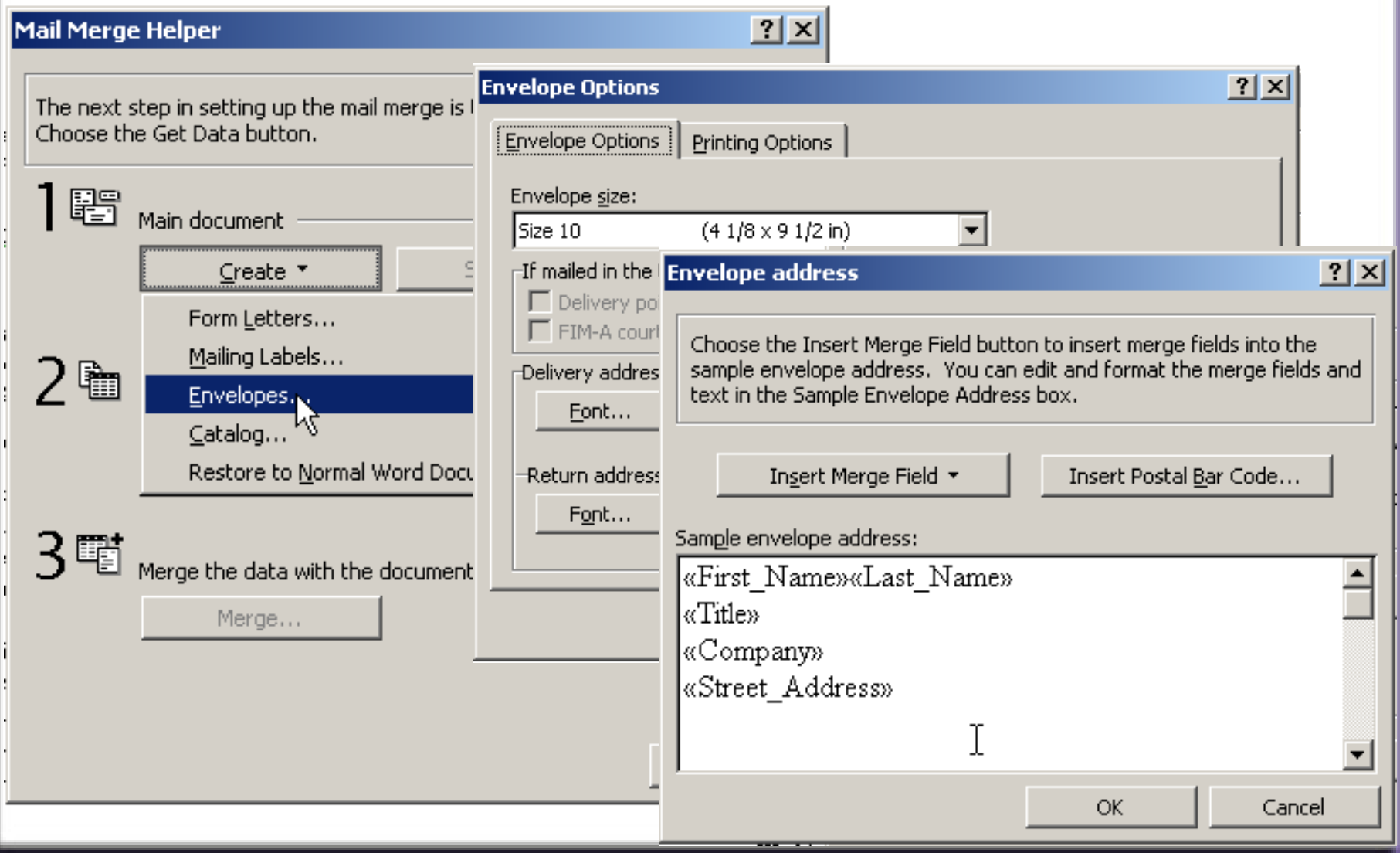


- Merge data from the data source into the main document

Mail Merges for Labels



Mail Merges for Envelopes



A Touch of Style

Styles are the Magic Wand of Word

- We will be learning…
  - What is a style?
  - Awesome automatic style formatting tools
  - How to apply styles
  - Built-in keyboard shortcuts for common styles
  - Modifying & Assigning a Shortcut Key
  - Creating, copying & deleting styles
  - Troubleshooting styles
  - Building a TOC using styles

What is a style?

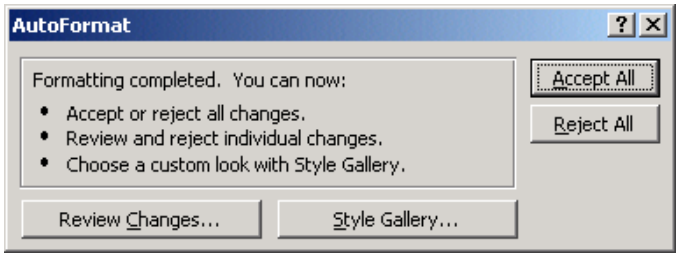
- Que's definition of a style: A series of formats that can be applied all at once to one or more paragraphs (or characters). Rather than applying formats by clicking toolbar buttons or dialog boxes, you choose a style & Word automatically applies all format for you. To change appearance of entire document, just change a few styles.
- The difference between manual & defined styles
  - **Manual: very time consuming** - applying formats by clicking toolbar buttons or dialog boxes for each individual component (bold, italics, etc.)
  - **Defined: faster** - choose a style & Word automatically applies all format components at the same time throughout the document
  - Format paintbrush can copy either manual or defined styles

OR
Ctrl+Shift+C = copy format
Ctrl+Shift+V = paste format

- Other advantages of defined styles:
  - dramatically reduce reformatting time by 90% or more
  - govern a documents appearance, readability and consistency
  - are the building blocks in the design of a template
  - allow several time-saving automated tools to work such as:
    - AutoText, AutoFormat & Themes (next slide)
    - Automatic section heading numbering, master documents and more
    - Generating table of contents (more on this later)

Awesome Automatic Style Formatting Tools

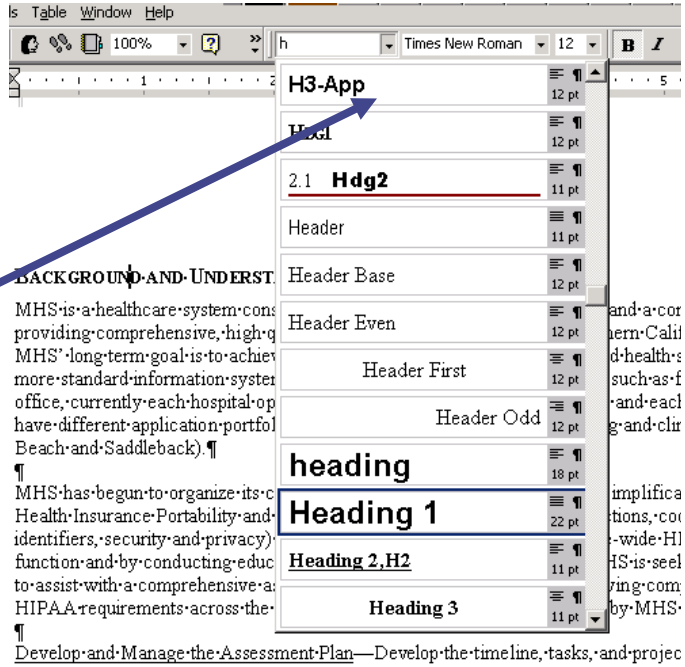
- Two automatic ways of adding a touch of style on the Format menu:
  - AutoFormat
    - Use to cleanup an unformatted document - use option that allows you to review accept/reject changes
    - Apply another look from Style Gallery (templates)



  - Themes
    - Designed for web layout but can be used in other documents as long as the format is acceptable (i.e., bullets will be become graphics & won't be hanging indents, etc.)
    - Select design that would work in printed doc (light background, darker headings, etc.)
    - After applying, return to page layout & check for consistency
    - Note that if your document has several newly created styles, they may not change since only the basic styles are affected (headings, bullets)

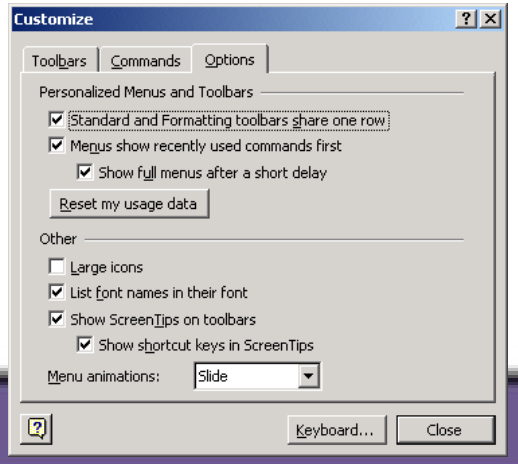
Adding a Touch of Style – Apply a Style

- Go to drop down style box and browse – each style is listed in the format as it appears in document
- Applying a style
  - Select text you want to change
  - Click on arrow in Style box scrolling to your choice
  - Click on it to apply
- If you don't like the choices, you should change them rather than adding a new style – see Modifying a Style



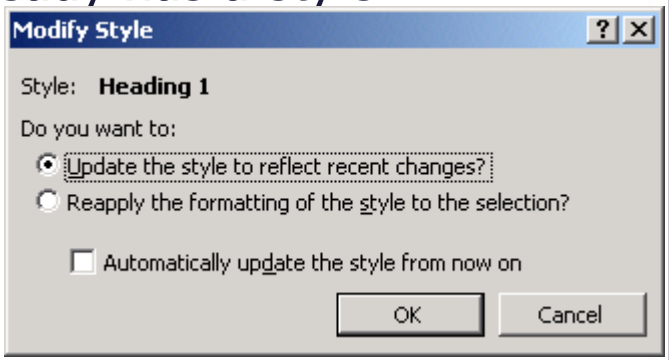
Built-in Keyboard Shortcuts for Built-in Styles

- Apply style with built-in shortcut keys for the 5 default styles most used - save on those mouse clicks by using:
  - Ctrl+Shift+N = Normal style
  - Alt+Ctrl+1 = Heading 1
  - Alt+Ctrl+2 = Heading 2
  - Alt+Ctrl+3 = Heading 3
  - Ctrl+Shift+L = List Bullet
- Other shortcuts are built-in – to see them on your menu go to View, Toolbars, Customize, Options
- You can assign your own shortcut keys to any frequently used style - see Assigning a Shortcut Key



Modifying a Style

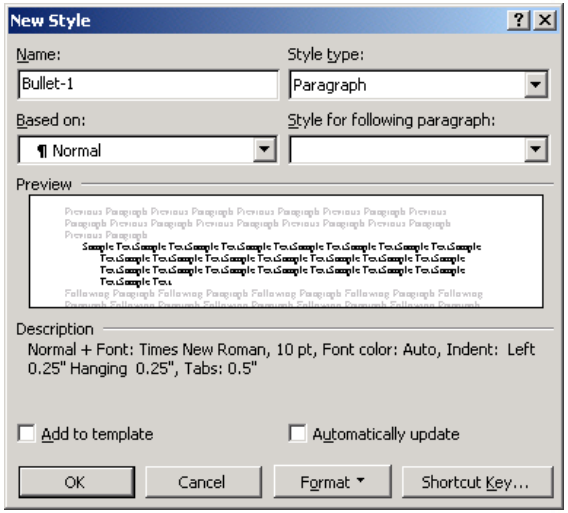
- To change or redefine a style
  - Make desired changes to text that already has a style assigned (i.e., Heading 1)
  - Click on drop-down arrow in Style box & click on Heading 1
  - Click the "Automatically update the style from now on" ONLY when you want that style to change throughout your document if you change it again as in a heading style



- Use caution when changing the "normal" style
  - Change it only if you want a global font change
  - Many other styles are based on it & will also change

Creating Styles

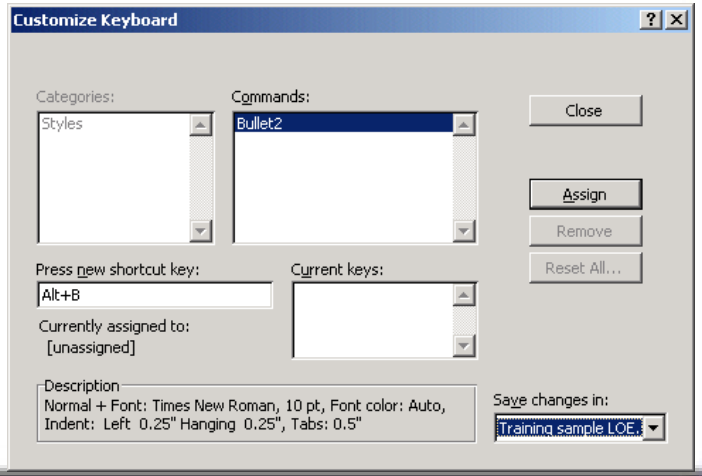
- Before creating a style check what's already available
  - Format text as desired & select paragraph
  - Go to Format/Styles/New
  - Name the new style – type in Bullet-1
  - Make it based on Normal so it changes if normal changes
  - Style for following paragraph should be same style for bullets
  - Check that description is same font – click on Format to make desired changes
  - DO NOT check the Add to template (do this only when working with a template)
  - DO NOT check Automatically update on a style being used in any kind of body text – you don't want it to change globally if you happen to bold one bullet!



- Before clicking OK, ask yourself…do you have a lot of reformatting to do using this style? If so, here's another very useful time-saving trick…

Assigning a Shortcut Key to a Style

- You can assign a shortcut key to a command, macro, font, AutoText entry, symbol, or a style
- While in the Modify Style, click on Shortcut Key button
  - Under Press new shortcut key: press Alt B for bullet
  - Always select keys not commonly used for other shortcuts – notice it will tell you if it's already assigned
  - If you want this shortcut to be active in only the current document, change the "Save changes in:" box to show the current document
  - Click Assign & Close, OK & Apply



Copying Styles

- Like everything in Word, there are several ways to copy styles from one document (or template) to another
  - The most common way to copy styles is just by coping text and pasting to new doc – that's how you get all those extra styles
  - Use format paintbrush – doesn't always work & time consuming
  - Use Templates & Add-ins when you want to bring in all styles plus all other components (AutoText, macros, toolbars)
    - Go to Tools, Templates & Add-ins
    - Check the "Automatically update document styles" box
    - Click Attach & browse to the template you want & click Open
  - Use the Organizer if you want to bring in a specific style or other component
    - Format/Styles/Organizer
    - Click Close File button on right side, then Open File & locate file to copy desired styles from

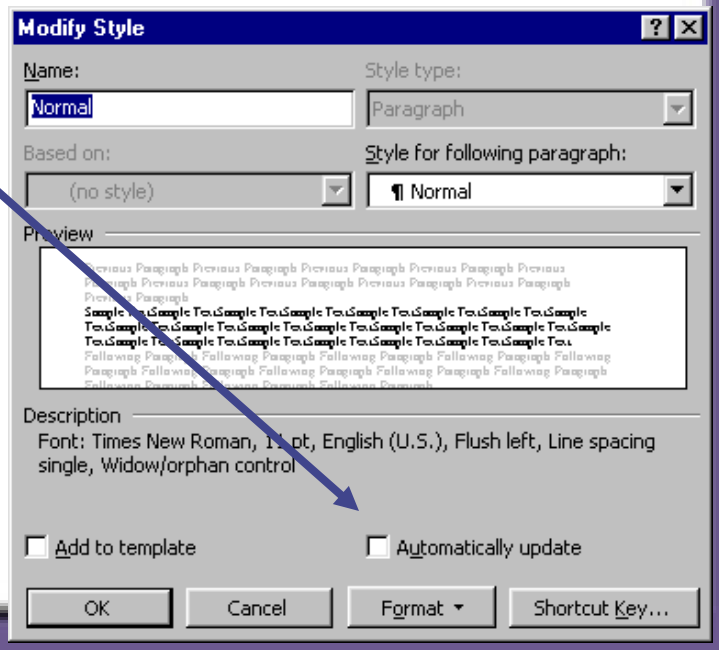
Deleting Styles

- Deleting a Style
  - Go to Format, Style
  - Select the style you want to delete
  - Click the delete button and press yes

For Steps on Quick Reformatting Tips & more about styles ask us for…
F1 Word Tip – Working with Styles

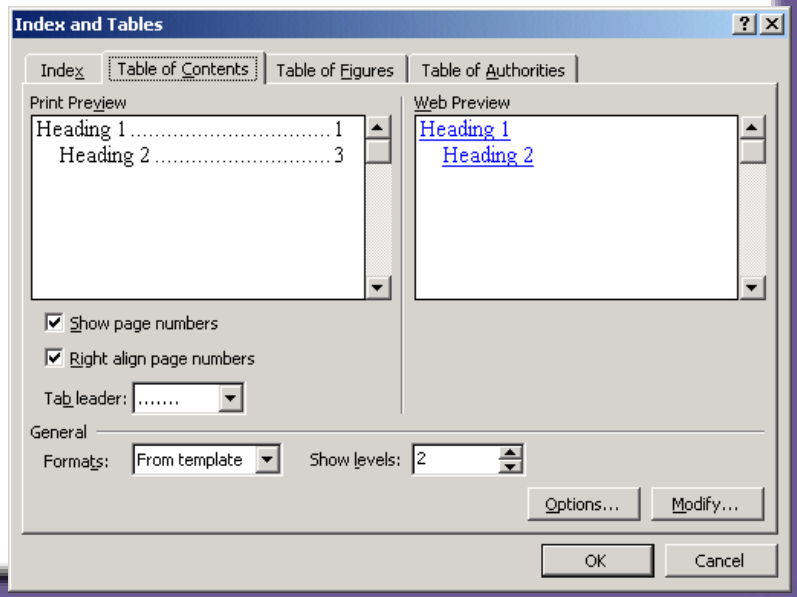
Troubleshooting Styles

- Did you change a style that other styles are based on?
  - If you change normal default style, all other styles based on it may also change
  - Limit defined style changes to normal
- Text style suddenly changes when you weren't expecting it
  - Go to Format, Style, Modify
  - Uncheck Automatically Update
- Know when to allow automatic style updates
  - Use only when you want all text with that style to change (such as a heading)

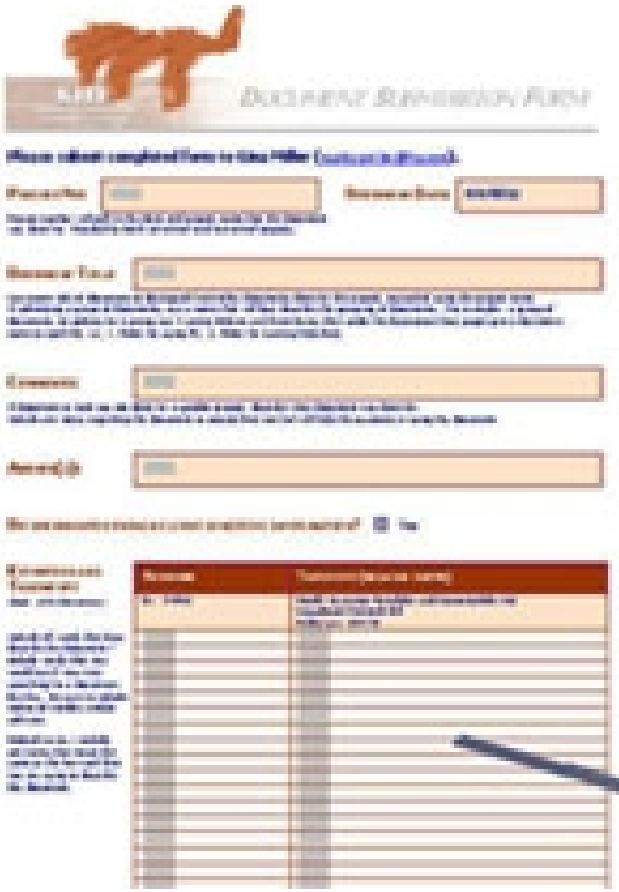


Using Styles to create an Automated Table of Contents (TOC)

- 1st check that Heading levels you want in your TOC are defined correctly throughout document
- Insert/Index & Tables/Table of Contents
  - Select 2 levels
  - Select From template for the format
  - Options – scroll to style used for Appendix headings & insert a 1 under TOC level & OK
- Once inserted, regenerate by:
  - F9 or Insert/Index & Tables
  - To change style of TOC listing, click on Modify, modify font, etc.
  - After OK answer Yes to replace



Form Formulas



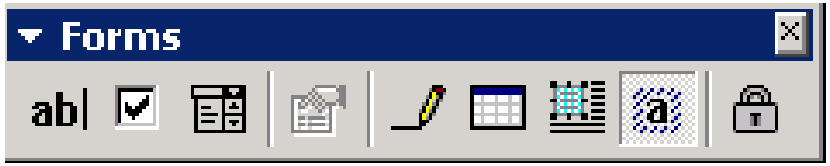
Form Facts to Consider First

- Do you need to create several forms with a consistent look?
  - Create a form template first
  - Add AutoText entries of items you need to repeat several times, i.e., yes/no boxes
- Important to know your audience before developing the format of a form
- Getting to know form toolbar - text fields, check boxes, and drop-down lists
- Tables are the foundation of most forms for both on-line or manual

Know your User

- Important to first ask the requestor how the form will be used to determine the type of layout to use
  - If it needs to be for both manual input and online, need to add more space and detail to instructions
  - If it's going to be faxed don't use shading
  - Are drop-downs appropriate? (i.e., user can only select 1 answer from a drop-down list so check boxes may be better)
  - Do you want "Help" tips included with text fields?
  - Do you want others to be able to edit form or should it be password protected?
  - Plan ahead – if the form is a "working" form, allow for future changes

Forms Toolbar

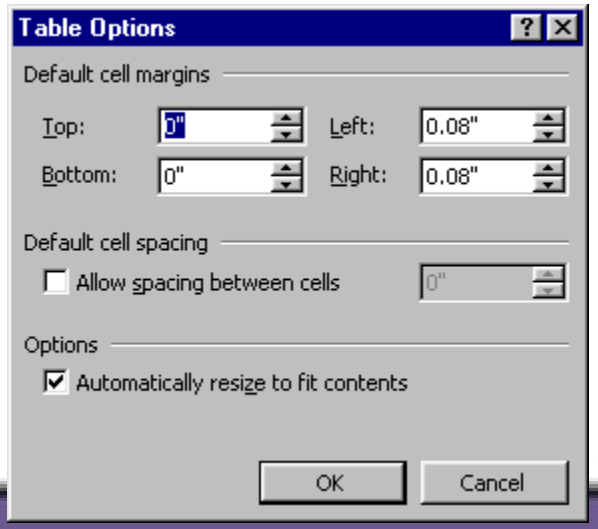


- Inserting text fields
- Adding check boxes
- Drop downs
- Table options
- Inserting frames
- Field shading on/off
- Locking/protecting
  - How do you unprotect only a portion of a form?

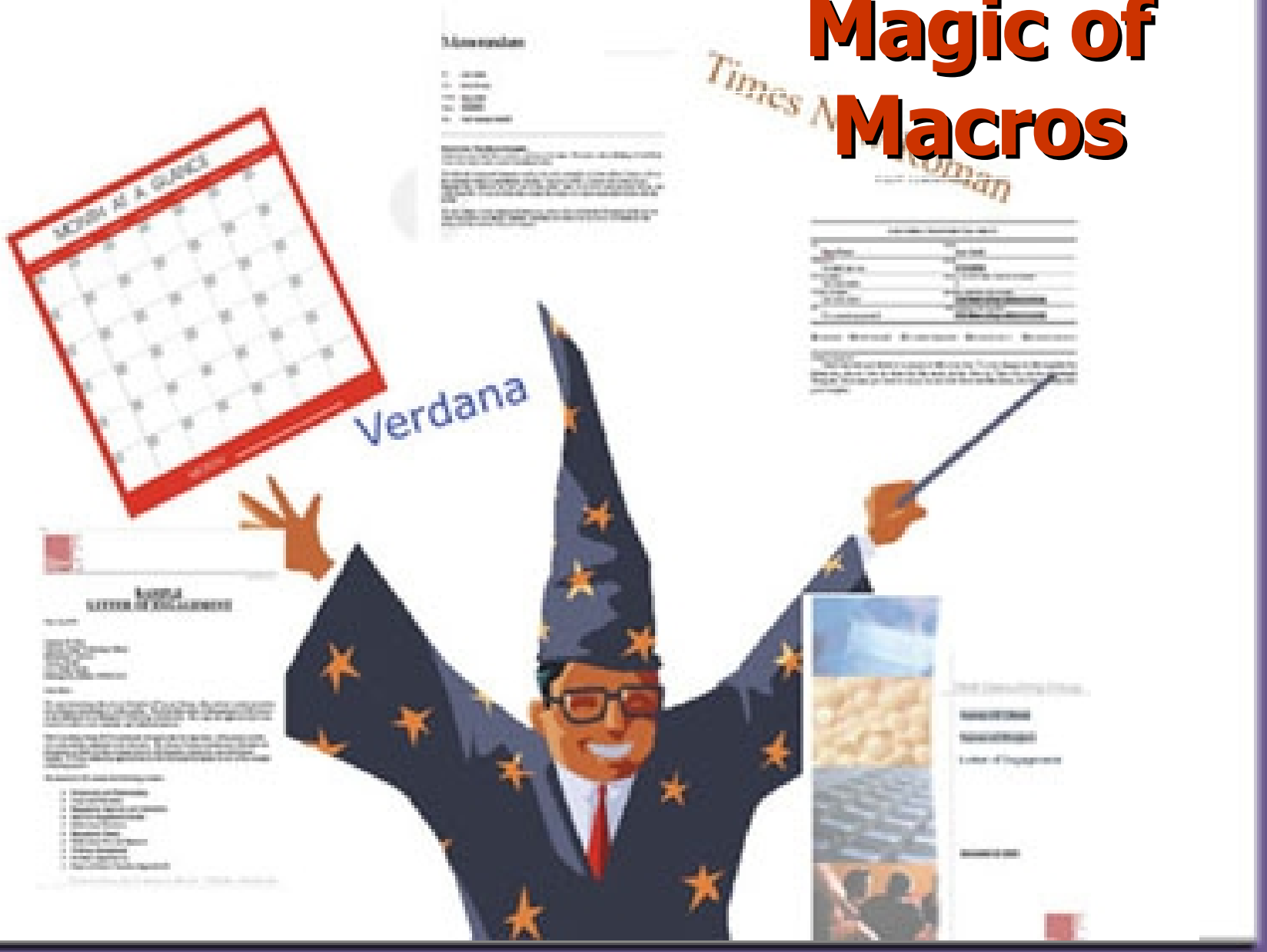
See F1 Word Tip Protect/Unprotect Form Sections

Use Tables for a Foundation

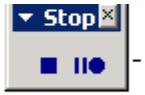
- Most forms work best in a table format
  - Add table rows, click on table button or use the pencil
  - Resize cells individually to accommodate fields
- Set table options to wrap text so the columns do not adjust in size when filled in by user
  - Table/Properties/Table, click on Options
  - Remove check from the "Automatically resize to fit contents"



Magic of Macros



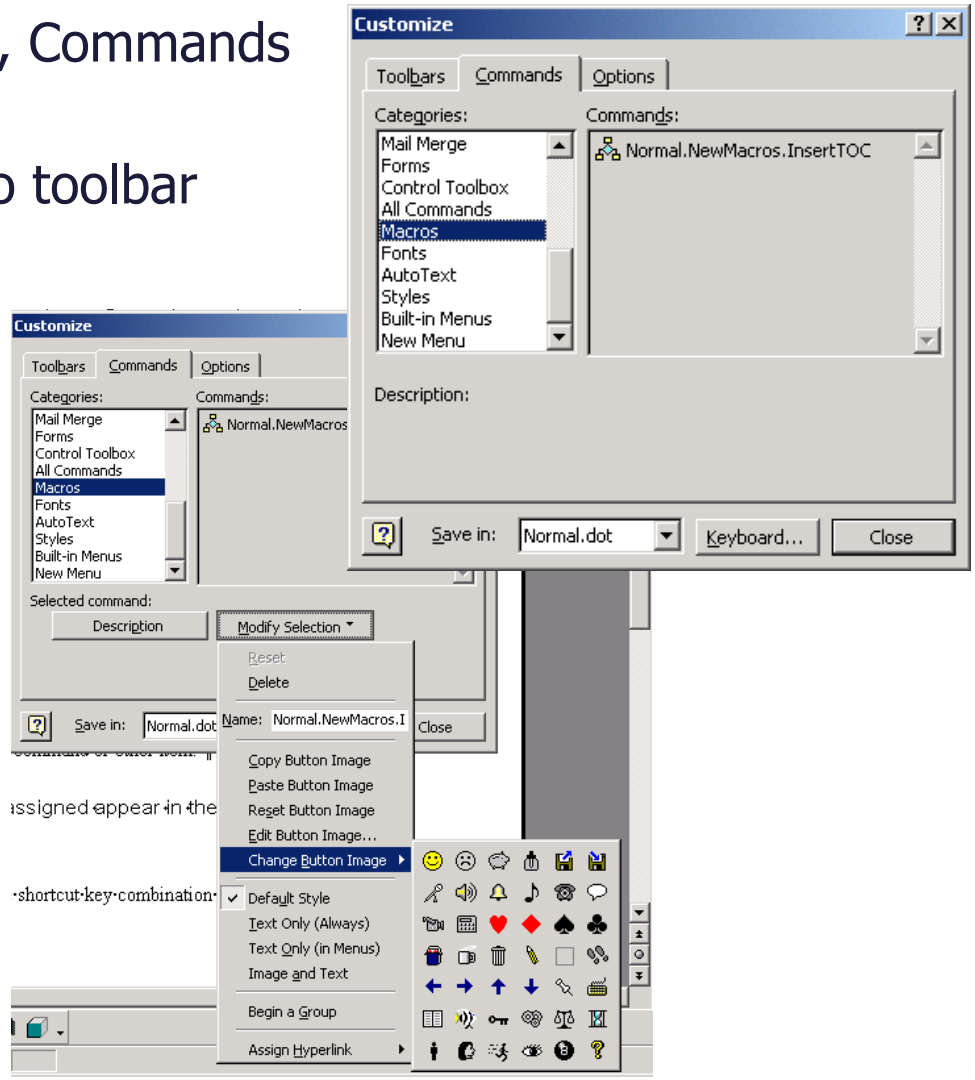
Recording Macros

- Ever think there must be an faster way to do something?
- Before making a macro, check to see if what you want to do is already done
  - Example – when working with styles you tend to go to the Organizer often but did you know there's a button already made for that? Get it off your toolbar customize selection (under All Commands).
- Recording a simple macro is like turning on a tape recorder 

- Let's make one to insert a TOC
  - Tools, Macro, Record new macro, name it, click on toolbar button, select & close
  - When you see the recorder button, go thru the steps of inserting a TOC - Insert/Index & Tables/Table of Contents/select 2 levels
  - Click OK and then Stop button on the recorder
  - To assign a button to your macro…

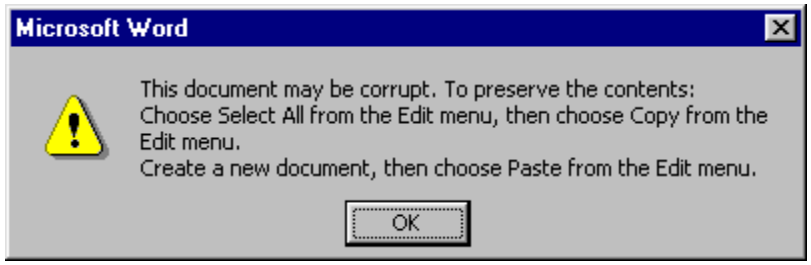
To assign a button to your macro…

- View, Toolbars, Customize, Commands
- Select Macros
- Drag the name of macro to toolbar
- Click Modify Selection
- Click on Default Style
- Click Modify Selection again & go to Change button image & select an icon



Magician's Troubleshooting Tips

Saving Corrupt/Damaged Files

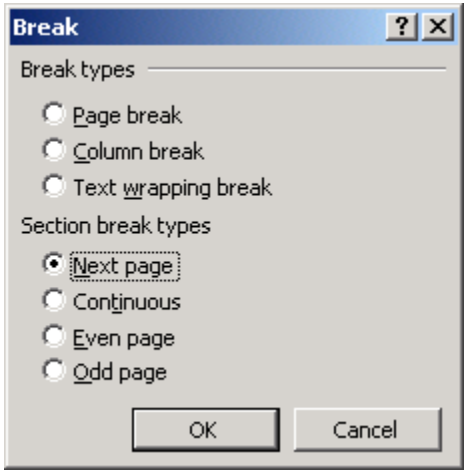


- Symptoms of a corrupted file: Continuous illegal errors, corrupt messages, not allowing you to save, print or to move past a certain point
- Most effective ways to save a file if you can open it
  - Insert damaged document into new document
  - Save as RTF file & then convert back to a doc
  - Save as HTML file & then convert back to a doc

For More Details…
See F1 Word Tip
Saving a Corrupt File

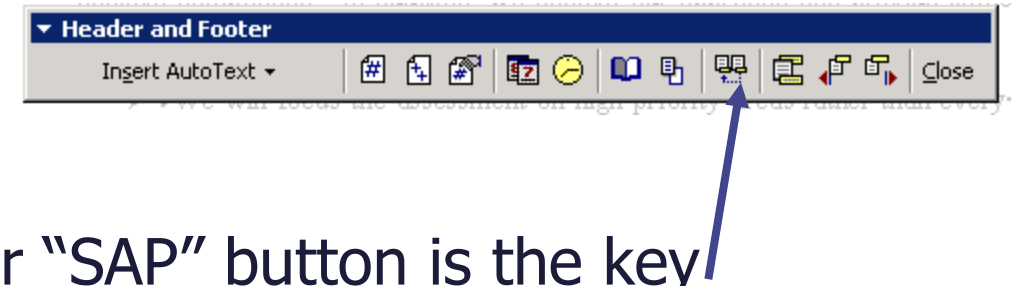
Section Breaks…
Breaking up is NOT Hard to Do!

- Importance of section breaks
  - Separates headers/footers when they need to be different
  - Holds information for header/footer
  - Allows different page layouts in same document
  - Allows page numbers to start over or have different formats
- To insert a break
  - Place cursor where to insert
  - Go to Insert – Break
  - Select Next page (if you want it to also act as a page break)



- How to remove a section break without removing header/footer
  - Quick fix…make it a continuous break

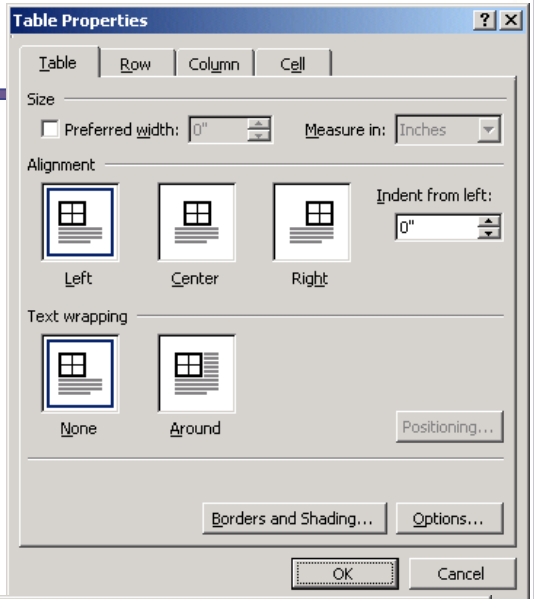
Stop the Header and Footer Nightmares



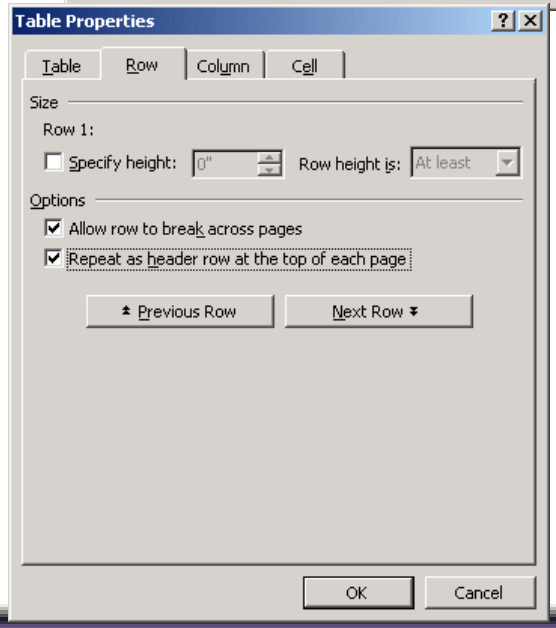
- Same as previous or "SAP" button is the key to getting headers/footers to cooperate when working with multiple sections
  - When adding section breaks, remember that the default setting for headers/footers is to be SAP
  - When you don't want the header or footer to be the same, you must click the SAP before changing

Table Tricks

- Changing Table properties
  - Text Wrapping – around vs. none
    - If tables are floating over text or on top of each other, make sure text wrapping is on None



  - Stop data from breaking up a row
    - Uncheck Allow row to break
  - Repeat header row on next page
    - Check Repeat header row

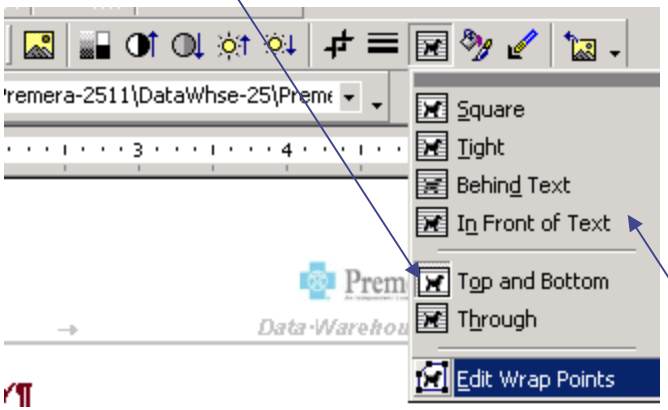


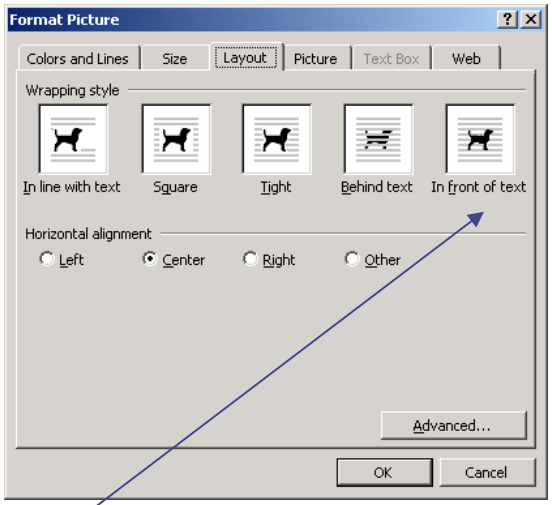
Object Tips…graphics, charts, spreadsheets

- Know the objective of the object before importing – determine which "Paste Special" format to use
  - If it needs to be edited later?
    - Word drawing vs. a PowerPoint object
  - Pros/cons of pasting as a picture
    - Less file size but limited editing
    - MS Project's "copy picture" camera
  - Pros/cons of linking
    - Great tool for updating 2 documents at same time but both files need to stay together to work

Object Tips…know the picture toolbar

- Text wrapping vs. Format picture/Layout
  - Text wrapping is similar to the layout in format picture but with different choices
    - Use Top to bottom under Text wrapping to place between text paragraphs





    - Use In Front of Text to float over the text
      - Format picture gives alignment options (text wrapping does not)

Q and A

- We will try to answer as many questions as time allows
- Please write down your questions and send us an email
- Remember to call or email me with your troubleshooting questions