

Microsoft Word Tips and Tricks for Technical Writers

by P. Rose Primeau, Autumn Jonssen, and Mellissa Ruryk

6-24-2024

© 2024 P. Rose Primeau, Autumn Jonsen, and Mellisa Ruryk.

This document is part of the assignment requirements for Simon Fraser University's TCOM240: Microsoft Word for Technical Writers: Advanced course in Technical Communication. The instructions and graphics work for Microsoft 365, version 2405 of Microsoft Word.

Contents

Module 1: Formatting	1
Setting up Word for technical writing	1
<i>How to set up autocorrect</i>	1
<i>How to set up field shading</i>	2
Formatting checklist	3
Styles	3
<i>How to create new paragraph styles</i>	3
<i>How to create new character styles</i>	4
Tables	4
<i>How to create table styles</i>	4
Images checklist	5
Formatting tips	5
Module 2: Page Layouts	7
Types of page layouts	7
Section breaks	7
Page numbers	8
<i>How to start page numbering at 1</i>	8
Module 3: Templates/Screencasts—Marking Index Entries	9
Creating and editing index entries	9
<i>How to mark index entries</i>	9
Module 4: Dynamic Content	11
Field codes	11
Numbering with sequence fields	12
<i>How to create numbered lists using sequence codes</i>	12
<i>How to use autocorrect to number lists</i>	13
Cross-references	13
<i>How to create cross-references to heading titles</i>	13
<i>How to create cross-references to heading page numbers</i>	14

Contents

P. Rose Primeau

Module-level tables of contents	15
<i>How to bookmark a module</i>	15
<i>How to create module-level tables of contents</i>	15
<i>Index style notes</i>	16
Index	17

Module 1: Formatting	1
Setting up Word for technical writing	1
<i>How to set up autocorrect</i>	<i>1</i>
<i>How to set up field shading</i>	<i>2</i>
Formatting checklist	3
Styles	3
<i>How to create new paragraph styles</i>	<i>3</i>
<i>How to create new character styles</i>	<i>4</i>
Tables	4
<i>How to create table styles</i>	<i>4</i>
Images checklist	5
Formatting tips	5

Module 1: Formatting

Using Microsoft Word (“Word”) effectively and efficiently is a balancing act. For some things, you hand over control to the software. For others, you take control of the software. Advanced users of Word understand when to use features that give the software control, and when to disable features that prevent the user from having complete control.

Word contains several features that allow you to format your documents consistently, efficiently, and in a manner that is easier to maintain.

Setting up Word for technical writing

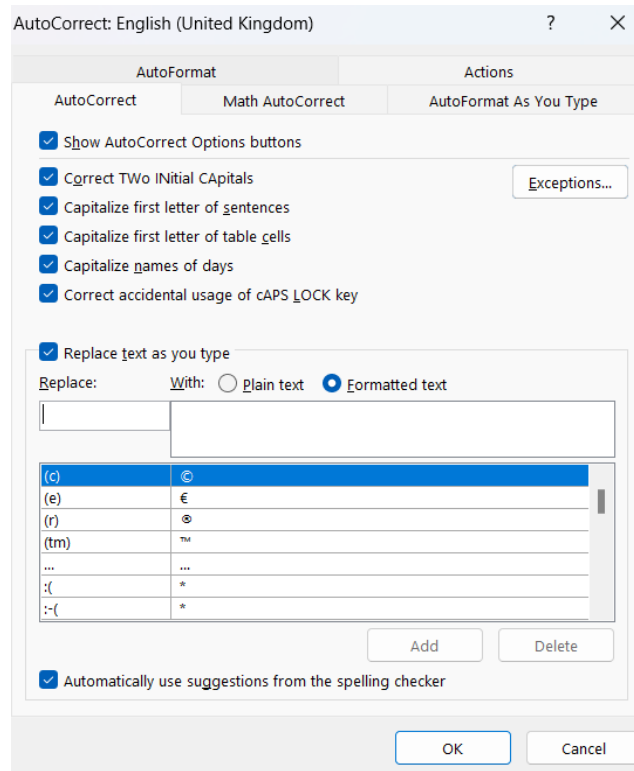
Technical writers need to see special formatting and characters that standard Word users do not need to see. Set up autocorrect and field-shading to optimize Word for technical writing.

How to set up autocorrect

You can set up autocorrect for technical writing using the following procedure (Figure 1):

1. Select **File > Options**.
2. Select **Proofing**.
3. Select **AutoCorrect Options**.
4. Choose options to meet your requirements.
5. Click **OK** on the dialogue boxes.

Figure 1: Autocorrect options



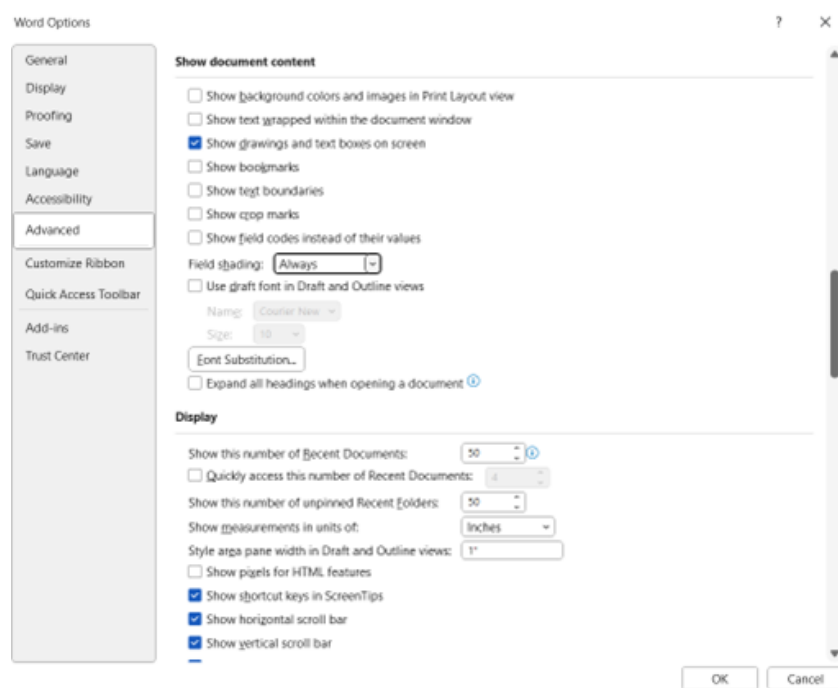
Source: Primeau 2024

How to set up field shading

You can set up field shading for technical writing using the following procedure (Figure 2):

1. Select **File > Options**.
2. Select **Advanced**.
3. Scroll to **Show document content**.
4. Select **Always** in the **Field shading** drop-down menu.
5. Click **OK** on the dialogue box.

Figure 2: Dialogue box for field shading



Source: Primeau 2024

Formatting checklist

When you verify the formatting of your documents, ensure you remove or avoid the following:

- Remove unnecessary carriage returns.
- Remove unnecessary double spaces.
- Avoid manual line breaks.
- Avoid manual paragraph formatting (including indentations).
- Avoid manual character formatting.
- Avoid manual page breaks.
- Avoid manual/multiple spaces instead of tabs.

Styles

In Word, a paragraph style includes character and paragraph formatting characteristics that you can apply to a paragraph or a series of paragraphs. These include font characteristics (name and size, colour, bold, and italic) as well as line spacing, text alignment, and indentations.

How to create new paragraph styles

You can create a new *paragraph* style for your document using the following procedure.

1. Ensure that your style gallery is visible (press **Alt+Ctrl+Shift+S**).
2. Select **New Style**.
3. Observe that the **Create New Style from Formatting** dialogue box opens.
4. Enter a unique name for the new style in the **Name** field.
5. Select **Paragraph** as the **Style type**.
6. Select your preferred font.

Module 1: Formatting

P. Rose Primeau

7. Choose your preferred formatting options using the **Format** drop-down menu.
8. Click **OK** to save your paragraph style.

Character style contains formatting characteristics that you can apply to text including text within a paragraph, such as colour, bold, italic, underlining, and superscript.

How to create new character styles

You can create a new *character* style for your document using the following procedure:

1. Ensure that your style gallery is visible (press **Alt+Ctrl+Shift+S**).
2. Select **New Style**.
3. Observe that the **Create New Style from Formatting** dialogue box opens.
4. Enter a unique name for the new style in the **Name** field.
5. Select **Character** as the **Style type**.
6. Select **Font**, and choose your preferred formatting options using the **Format** drop-down menu.
7. Click **OK** to save your character style.

Tables

Table 1 shows a default table style in Word. This default table style is 4 columns wide by 5 rows deep. The shading in row 1 and the row height of 0.4" emphasises the column titles. The table aligns left and indents from left at 0.25".

Table 1: Default table style

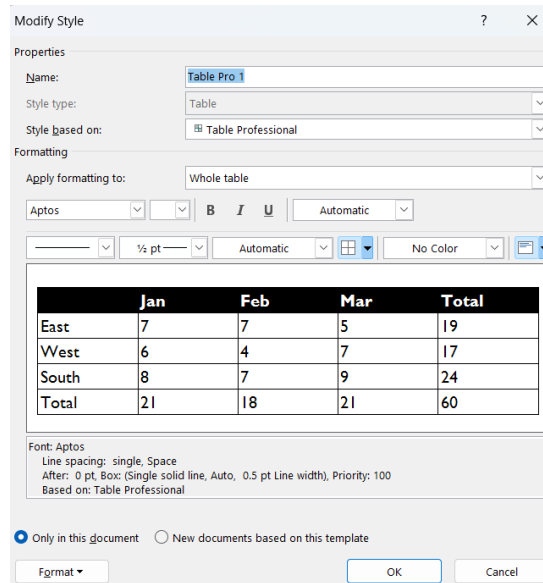
How to create table styles

You can create your own table style using the following procedure:

1. Click **Insert > Table** to insert a table.
2. Select all cells in the table.
3. Click **Table Design > Table Styles > New Table Style**.
4. Enter a unique name for the new table style in the **Name** field.
5. Select your preferred formatting options for the table design.

Figure 3 shows the style's properties dialogue box for Table 1.

Figure 3: Default table style



Source: Primeau 2024

Images checklist

When you insert images into your documents, keep the following in mind:

- Choose whether to link or embed images into your documents.
 - ❖ Link images that appear in long documents, or in documents with many images.
 - ❖ Embed images that appear in shorter documents.
- Avoid floating images by setting the **Wrapping Style** to **In line with text**.
- Use styles to adjust indents, spacing, and other aspects of image formatting.
- Resize your images by clicking the image and use **Size and Position > Scale**.

Formatting tips

Here are some formatting tips for you to remember:

- Control image placement using styles.
- Inspect formatting using Outline view (**View > Outline**).
- Examine non-printing characters with the pilcrow function (¶).
- Access functions quickly using shortcuts (like **Ctrl-F**, **Ctrl-Z**, **SHIFT+F5**).

Module 2: Page Layouts	7
Types of page layouts	7
Section breaks	7
Page numbers	8
<i>How to start page numbering at 1</i>	8

Module 2: Page Layouts

Page layout is the part of document design that deals with the placement of content on the page. Typically, a document page has three areas:

1. **Margins:** the area on the edges of the page with no text or graphics.
2. **Headers and footers:** the area on the top and bottom of the page that usually contains navigation information (document title, section number or chapter title, page number).
3. **Content area:** the area in the middle of the page that contains the document content.

Page layouts can be simple or complex. Typically, online documents have a simple layout (all pages have the same structure). Printed documents have a complex structure (different even and odd pages and sections starting only on odd pages).

Types of page layouts

To configure page layouts in your document, you need to choose which type of layout(s) to use. Table 2 describes the different types of page layouts and when to use them.

Table 2: Different types of page layouts

Page layout type	Description	When to use
Simple layout	Uses the same structure (header and footer content) for all pages in the document; this is the default layout for Word documents	For single-sided documents or documents unlikely to go to print
Double-sided layout (even/odd)	Uses the same headers and footers on all odd-numbered pages, and the same on all even-numbered pages. The odd pages and even pages do not need to be the same.	For double-sided documents bound most often in portrait orientation
Different first page layout	Uses headers and footers on the first page of a section that differ from the section's pages (such as the first page of a chapter, where headers and footers are blank)	For single-sided documents or documents unlikely to go to print
Complex layout	Uses headers and footers on the first page of a section that differ from the section's pages (such as the first page of a chapter, where headers and footers are blank) Uses different page numbering formats in different parts of the document (such as Roman numerals in the table of contents or unnumbered pages in the front matter)	For single-sided and double-sided documents (most technical documents use a complex layout)

Section breaks

Section breaks divide types of content and give you control over document formatting and page layout. Table 3 describes the different types of section breaks and when to use them.

Table 3: Different types of section breaks

Section break type	Description	When to use
Next Page	Starts new section on the next page, whether even or odd	For single-sided documents
Continuous	Starts new section on the same page	For columns (such as indexes)
Even Page	Starts new section on the next even-numbered page	For mixing landscape pages with portrait pages—avoid in technical writing
Odd Page	Starts a new section on the next odd-numbered page, adding a blank page if needed.	For double-sided documents

Page numbers

Complex documents may have sections that follow different formats for page numbers. Among other options, you can restart the sequence of page numbers.

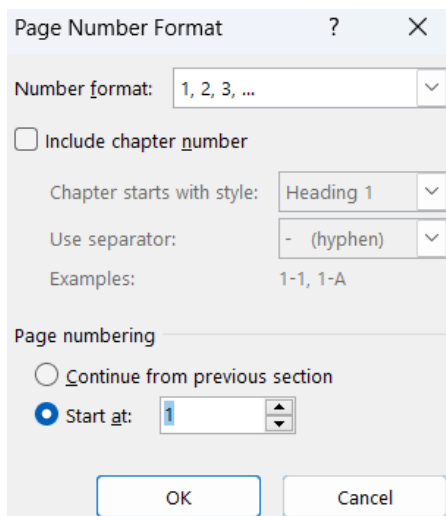
How to start page numbering at 1

You can use the following procedure to start page numbering at 1 after the table of contents:

1. Ensure that an even page section break follows the table of contents.
2. Place the cursor in the footer of the page following the section break.
3. Turn off **Same as previous**.
4. Click **Insert > Page Number**.
5. Select **Format > Page Numbers** from the drop-down menu.
6. Select **Start at** under **Page numbering** in the **Page Number Format** dialogue box.
7. Enter numeral **1** in the adjacent box.
8. Click **OK** to save your page number settings.

Figure 4 shows the dialogue box for the procedure to start page numbering at 1 after the table of contents.

Figure 4: Page numbering format



Source: Primeau 2024

Module 3: Templates/Screencasts—Marking Index Entries **9**

Creating and editing index entries.....	9
<i>How to mark index entries.....</i>	<i>9</i>

Module 3: Templates/Screencasts—Marking Index Entries

As a technical writer, you can create an embedded index in Word to enhance your document creation process. A good index helps make user-friendly documents. Readers of technical documentation can consult indexes to “raid” specific topics of interest. Use embedded tags to index terms during the editing and revising stages. As you modify your document, Word adjusts the page numbers each time you update the index.

Creating and editing index entries

Word’s embedded indexing feature allows you to embed index markers and terms into your document. You can find the embedded indexing feature on the References tab in the Index group. Figure 5 shows the Mark Index Entry dialogue box for the procedure to mark words as index entries.

How to mark index entries

You can mark an index entry using Word’s embedded indexing feature using the following procedure.

1. Highlight a word or phrase in the text.
2. Select **References > Mark Entry** or press **Alt-Shift-X** to open a **Mark Index Entry** dialogue box.
3. Accept or overwrite the highlighted word or phrase in the **Main Entry** box.
4. Click **Subentry** or press the **TAB** key to enter a subheading.
5. Choose options to meet your requirements.
6. Click the **Mark** button to mark the entry.
7. Click **Close**.
8. Ensure that the pilcrow function (¶) is active to see your index entry.

Module 3: Templates/Screencasts—Marking Index Entries

P. Rose Primeau

Figure 5: Dialogue box for marking index entries

Mark Index Entry

Index

Main entry:

Subentry:

Options

Cross-reference:

Current page

Page range

Bookmark:

Page number format

Bold

Italic

This dialog box stays open so that you can mark multiple index entries.

Mark Mark All Cancel

Source: Primeau 2024

As you revise a document, Word revises the page numbers each time you regenerate the index. To view a screencast of the procedure, see [How to mark index entries in Word](#).

Module 4: Dynamic Content	11
Field codes	11
Numbering with sequence fields	12
<i>How to create numbered lists using sequence codes</i>	<i>12</i>
<i>How to use autocorrect to number lists</i>	<i>13</i>
Cross-references	13
<i>How to create cross-references to heading titles</i>	<i>13</i>
<i>How to create cross-references to heading page numbers</i>	<i>14</i>
Module-level tables of contents	15
<i>How to bookmark a module</i>	<i>15</i>
<i>How to create module-level tables of contents</i>	<i>15</i>

Module 4: Dynamic Content

Dynamic content is content that Word controls. Using the dynamic content features to automate tasks saves you time and makes your documents easier to update.

Fields are variables used to assign data within your documents. Word uses fields with commands that generate dynamic information, such as numbered lists, date and time, page numbers, and cross references.

Technical writers typically use fields for the following elements:

- Page numbers.
- Bullets and numbering.
- Cross references and hyperlinks.
- Table of contents.
- Indexes.

Field codes

Field codes are the values used to control the data in the fields. They instruct Word to insert specific information. Table 4 describes the shortcuts for displaying, hiding, updating, locking, and unlocking field codes.

Table 4: Field codes with shortcuts

Action	Description	Shortcut
Display/Hide field codes	Toggles between displaying and hiding field codes in a document	Press ALT+F9
Display/Hide selected field code	Toggles between displaying and hiding a selected field code	Click within the field, then press SHIFT+F9
Update selected field	Updates a selected field manually; Word’s default setting automatically updates fields when you open a document.	Click within the field, then press F9

Action	Description	Shortcut
Update fields in main body of document	Updates all fields in the main body of a document manually; Word's default setting automatically updates fields when you open a document.	Press CTRL+A , then press F9
Update fields in headers, footers, and text boxes	Updates separately from the main body of a document	Click within the header, footer, or text box, press CTRL+A , then press F9
Lock a field	Locks a field to prevent automatic updating	Click within the field, then press CTRL+F11
Unlock a field	Unlocks a field so that you can update the field	Click within the field, then press CTRL+SHIFT+F11

After you revise your document, ensure that you update all fields. Remember that you need to update headers, footers, and text boxes manually. For additional information on inserting, editing, and viewing fields in Word, see [Insert, edit, and view fields in Word](#).

Numbering with sequence fields

Use numbered lists when the sequence of the steps is important. Numbered lists are particularly challenging in Word. If your document contains more than 10 numbered lists, complex numbered lists, or multiple authors, then use the Sequence function (SEQ) instead of the default number styles.

Each field contains the following parts:

- Field name, which is SEQ.
- Identifier, such as Step, for a given style of numbering.
- Switch that controls the number:
 - ❖ \r 1 restarts numbering at 1.
 - ❖ \n displays the next number in sequence.

How to create numbered lists using sequence codes

To create predictable numbered lists using sequence codes, complete the following procedure:

1. Create a paragraph style for your list. Set the tab characteristics and hanging indent appropriately.
2. Insert a SEQ code for the first item in your list:
 - a. Select **Insert > Quick Parts > Field** and the **Field** dialogue box opens.
 - b. Select **Numbering** from the **Categories** drop-down menu, then select the field **SEQ** from the **Field names** gallery.
 - c. Type a unique name for your list in the **Advanced field properties** dialogue box.
 - d. Click **Options**.
 - e. Select the numbering format and click **Add to Field**.
 - f. Select the switch (\r) and click **Add to Field** with the number **1**.
 - g. Click **OK**.
3. Insert a separator and a tab character into your document.
4. Insert a SEQ code for the second and subsequent items in the list.

- a. Select **Insert > Quick Parts > Field** and the **Field** dialogue box opens.
 - b. Select **Numbering** from the **Categories** drop-down menu, then select the field **SEQ** from the **Field names** gallery.
 - c. Type the same name for your list (from step 2c) in the **Advanced field properties** dialogue box.
 - d. Click **Options**.
 - e. Select the switch (**\n**) and click **Add to Field**.
 - f. Click **OK**.
5. Insert a separator and a tab character into your document.

How to use autocorrect to number lists

Technical writers can more effectively control the formatting of lists in larger documents by using autocorrect to insert SEQ codes.

You can use the following procedure to number lists in your document with autocorrect:

1. Follow the procedure How to create numbered lists using sequence codes to number the first two items in your list.
2. Ensure that the pilcrow function (**¶**) is active.
3. Select the number and tab for the first item in your list.
4. Click **File > Options >**.
5. Select **Proofing > Autocorrect Options** in the **Word Options** dialogue box.
6. Set the **With** field to **Formatted text** under **Replace text as you type**.
7. Click **OK** to save your settings.

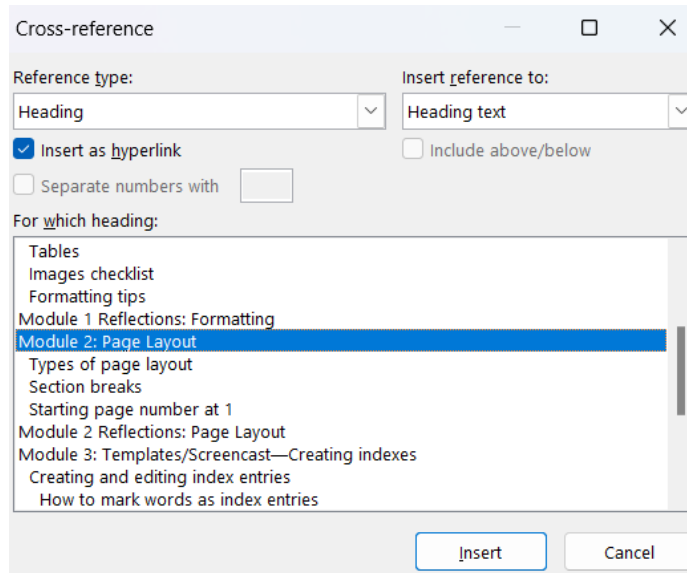
Cross-references

Technical writers use cross-references to refer users to information without repetition. Print documents must include both a heading title and a page number for each cross-reference.

How to create cross-references to heading titles

- You can add a cross-reference to a heading title using the following procedure (Figure 6):
 1. Select **Insert > Cross-reference**.
 2. Select **Heading** in the **Reference type** drop-down menu.
 3. Select **Heading text** in the **Insert reference to** drop-down menu.
 4. Select the appropriate heading from the **For which heading** gallery.
 5. Click **Insert**.

Figure 6: Adding a cross-reference to a heading title



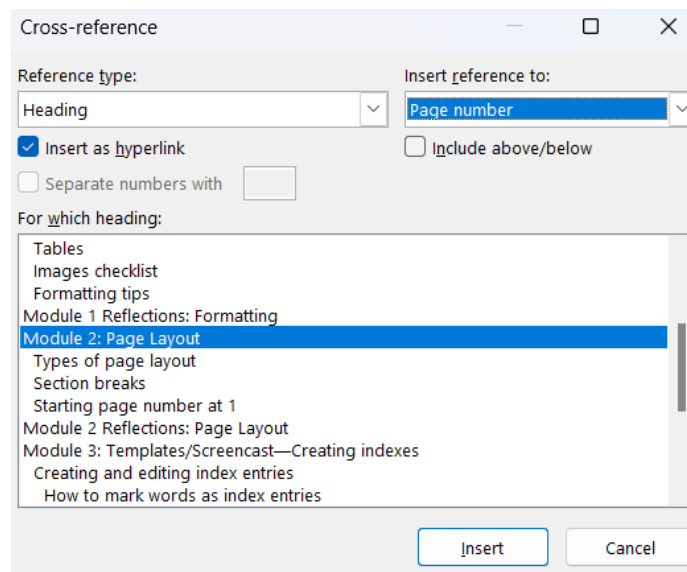
Source: Primeau 2024

How to create cross-references to heading page numbers

You can add a cross-reference to a heading page number using the following procedure (Figure 7):

1. Select **Insert > Cross-reference**.
2. Select **Heading** in the **Reference type** drop-down menu.
3. Select **Heading text** in the **Insert reference to** drop-down menu.
4. Select the appropriate heading from the **For which heading** gallery.
5. Click **Insert**.

Figure 7: Adding a cross-reference to a heading page number



Source: Primeau 2024

This produces a cross-reference, in the format of **Module 2: Page Layouts**

Types of page layouts	7
Section breaks	7
Page numbers	8
<i>How to start page numbering at 1</i>	<i>8</i>

Module 2: Page Layout on page 7. on page 7.

Module-level tables of contents

As a technical writer, you can use lists of headings to help the user navigate your documents. Complex document styles often begin each module with its own table of contents (TOC) or a mini-TOC.

You can add a module table of contents by creating a bookmark for the entire content of the specified module and then creating a TOC for that bookmark.

How to bookmark a module

You can create a bookmark for a module using the following procedure:

1. Select the entire content of the specified module.
2. Select **Insert > Bookmark**.
3. Insert a unique **Bookmark name**.
4. Click **Add**.

How to create module-level tables of contents

You can create a table of contents for a module using a bookmark using the following procedure:

1. Select **Insert > Quick Parts > Field**.
2. Select **TOC**.
3. Click **Field codes**.
4. Click **Options**.
5. Select **(/b)** from the **Switches** gallery and click **Add to Field**.
6. Type the bookmark name under **Field codes: TOC [Switches]**.
7. Click **OK** in the **Field Options** dialogue box.
8. Click **OK** in the **Field** dialogue box to create a module-specific TOC.

Index style notes

Acronyms. Use the full name for acronyms in parentheses: e.g., “TOC (Table of Contents)” as recommended by the Chicago Manual of Style, 17th edition.

Capitalization. Use lowercase letters on all nouns.

Cross-references. Use *See* references when multiple keywords or phrases have identical meanings and a particular one is favoured (e.g., “automating tasks. *See* dynamic content”).

Nouns. Use the plural for countable nouns (e.g., “fields”, “tasks”, “styles”); this is done for consistency and to follow industry convention.

Verbs. Use gerunds in place of action verbs, both as stand-alone *headings* (e.g., “numbering”, “creating”, “formatting”) and within *main headings* and *subheadings*.

Parentheses. Use parentheses only surrounding a gloss – e.g., “toggles (editing function)” – or when expanding an acronym or abbreviation: e.g., “TOC (table of contents)”.

Columns. The index is two-column, run-in style.

Index

- autocorrect, 1, 19
- automating tasks. See dynamic content
- bookmarks, 21
- character styles, 3, 4
- complex documents, 10
- cross references, 19–20
- dynamic content, 17–21
- embedded indexes, 13–14
- field, 1, 2, 17, 18, 19
- field codes, 17–19; cross-references, 19;
shortcuts, 17; updating, 18
- field shading, 2
- footers: page layouts, 9
- formatting, 1–3; checklist, 3; images, 5; tips, 5
- headers: page layouts, 9
- images checklist, 5
- list numbering: using autocorrect, 19; using the
SEQ (sequence function), 18
- margins: page layouts, 9
- module bookmarks, 21
- module table of contents, 21
- module TOC (table of contents), 21
- page layouts, 9–10; complex, 9; section breaks,
10; simple, 9; types, 9
- page numbering, 10
- paragraph styles, 3, 18
- section breaks, 10
- SEQ (sequence function), 18, 19
- setup, 1–3
- styles, 3–4
- table styles, 4
- tables, 4–5
- TOC (table of contents), 10, 21
- toggles (editing function), 17