

How to use MS Word like a pro

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Intended audience of this handout: professional linguists (especially graduate students) who use Microsoft Word but are sometimes frustrated with its features. The goal of this handout is to highlight and explain some of the excellent but relatively unknown features of the program.

1 Preliminaries

When writing in MS Word (henceforth simply “Word”), users frequently find themselves cursing at the automated formatting features such as numbering. Word assumes that its users want most of the formatting done for them, and it fancies itself a “learning program”—that is, it tries to adapt to what it thinks your formatting needs are. Linguists have very intensive and specific word-processing needs, though, and most people like to have a fair degree of control over these features.

It is my opinion that Word is actually an excellent tool, though it hides its good features well and puts its worst features out on display. Many of these good features are exactly what many linguists need, and some of them actually work better than analogues in high-level document preparation systems such as LaTeX (especially Cross-referencing; see section 6). Other features discussed in this handout are Paragraph Styles (sec. 3 and 4), Numbering (3.1), and Table of Contents (sec 7).

This handout is based on Word versions X and 2004 for Mac, but it should work analogously for other versions. If any part of the instructions does not seem to be implementable in your version, try to look through the menus on your own first (Microsoft moves things around from version to version, just to keep you interested) and then check Help.

2 Step 1: turn off Word's brain

Word is rather lousy at guessing what your needs are, so the first step in using it is turning off its automatic formatting. Most people do this pretty early on—or as soon as they discover what Word's idea of a numbered list is. In case you haven't turned auto formatting off yet, here are the steps:

- (1) Go to Tools>AutoCorrect.
- (2) Click on the AutoFormat as You Type tab.
- (3) Uncheck the box Define styles based on your formatting. (If on, then Word thinks it's licensed to generalize every little change you make to one area of a document to others; very bad idea.)
- (4) Uncheck all the boxes under Apply as you type options. If these options are on, then Word will attempt to guess when you are trying to create, say, a numbering list, where in fact you want to tell it when to apply numbering and when not to.
- (5) Feel free to experiment with the other options under AutoCorrect; I personally like that Word supplies smart quotes but don't need it to correct "misuse" of capitals (I need to use two caps next to each other for constraint names like MPARSE, for example).

3 Step 2: define your own styles

The key to controlling Word's formatting is the idea of *styles*. Styles are similar to environments in LaTeX; these are zones in the document that have pre-defined formatting; you can change various aspects of the formatting to your liking. When you do so, all the areas of the document that are set in that style will be changed with it. This is a good feature if you use styles consistently.

Styles allow you to have controlled, automatic numbering (in more than one format if you wish), section headings that are numbered automatically, and ultimately using styles allows you to make use of Word's best feature: Cross-referencing (see section 6). If you master styles, you will never have to go through your final draft and correct numbering by hand; your document will also update references to numbered examples and other sections of the document whenever you add or move examples.

3.1 Defining styles

You define styles in Word by going to Format>Style, where you can create new styles from scratch, modify existing styles that Word ships with, and so on. The style that I find completely indispensable, and that you have to create from scratch, is the automatic-numbering-in-parentheses style. Here is how I created mine (for demonstration, it is used throughout the handout; all the numbered examples in parentheses are in that style):

- (6) Go to Format>Style. Click on New.
- (7) A new style is named *Style 1* by default; give it a less generic name such as *Numbered*. Style type should be set to *Paragraph*. Based On should be set to *Normal*.

- (8) This is very important: Style for Following Paragraph should be set to *Normal*. This ensures that when you apply the *Numbered* style, it doesn't start a never-ending list; the style is only applied when you need a numbered example, and otherwise the following paragraph is a normal text paragraph. (*Normal* is a pre-defined Word style that you shouldn't need to modify.)
- (9) In the Format drop-down menu at the bottom of the dialog box, select Numbering.
- (10) Select the middle tab in the dialog box that appears (between Bulleted and Outline Numbered). You will see six or so numbering styles. Select the one that puts the number between curly brackets, without the period after the number.
- (11) If, for some reason, this style is not among the six default ones, click on Customize. Here you can change various aspects of the numbering style, such as how the number appears and where it starts. You might need to modify the number format box (put brackets around the gray number); you might also change the numbering style itself. Click OK to return to the New Style dialog box.
- (12) In the Format drop-down menu, select Paragraph. If you want your numbered examples to be indented with respect to the rest of the text, as mine are in this list, then under Indentation, type 0.5 into the "left" box. Alternatively, select Hanging Ident by 0.5, but then you have to set a Tab at 0.5, too—which you do by clicking on the Tabs button at the bottom of this dialog box. Click OK.
- (13) When you return to the New Style dialog box, check the box Add to Template. Once you create this style, it will be available in all your new documents that are in the *Normal* template (the one Word uses by default.) Uncheck the box AutoUpdate if it is checked.

3.2 Tying styles to keys on the keyboard

You can end it here (exit by clicking OK), or take a shortcut step by tying this new style to a combination of keys. The default way of using a style in Word is through the Formatting toolbar—the drop-down menu next to your Fonts menu, the one where “Normal” usually appears, allows you to select any of the styles in the template. As this gets a little tedious, a much quicker way is to use a key combination shortcut such as Ctrl+N.

- (14) To set the key combination in the New Style dialog box, click on Shortcut Key and enter the key combinations you want to use directly. If your combination is taken, Word will inform you, but you can change its defaults.
- (15) Finally, click on OK and exit the New Style dialog box. Then click Apply and exit the Style box. The result should be that the text in your open document will now appear in the *Numbered* style.

It is a good idea to tie the *Normal* style to a key combination, too, so that you can switch back to it quickly. To do this, go to Format>Style, select *Normal* from the list of styles on the left, and click on Modify. Click on Shortcut Key and assign some other key combination. I have my *Numbered* style as ⌘+N and my *Normal* style as Ctrl+N; you may also use Alt, Fn, or any other special keys on your keyboard.

Note: I don't know about other people, but I consider it bad manners when people change default key bindings on public computers. If you expect ⌘+N to open a new

window and instead it inserts an [η], you get very mad. It's bad even if you don't change default key bindings but introduce new ones, e.g., Alt+N, because people hit key combinations by mistake sometimes and then are left to wonder what just happened... SO PLEASE CONFINE YOUR KEY BINDING EXPERIMENTS TO YOUR OWN COMPUTER.

If you don't know the key combinations that Word uses in your current configuration, go to Tools>Customize and click on the Keyboard button. The list of Word's normal commands on the left is followed by a list of *Styles* and *Macros*, which is at the bottom. You can change keyboard assignments in this box.

Windows users are familiar with many default key bindings because they are hinted at by underlined letters in menus. Mac users don't have it easy when it comes to key bindings; if you are a recent switcher like me, you might have found that key combinations you used in the Windows version of Word don't do anything in the Mac version. But you can re-assign these combinations of keys back by using Tools>Customize.

I don't know if Word has all of these key bindings listed in one place somewhere; it would be very convenient.

3.3 Aligning glosses

While we are on the *Numbered* style, it makes sense to discuss aligning glosses. There are multiple ways of doing this. (At one point, I remember there was a macro for this that somebody distributed for free...) The most straightforward and low-tech way is probably by using tabs. Here is how.

- (16) Apply the *Numbered* style and type the sentence in the original language, separating words by tabs.
- (17) The following two lines should not be in the *Numbered* style; if you want, create another style based on the *Normal* style but make sure it's always indented by 0.5. You can make a style called *Gloss* and another called *Translation*, or call both the same thing. Their properties are not that important, as long as they are left-aligned with the original sentence.
- (18) Type the gloss sentence under the original sentence, separating words by tabs.
- (19) Select the original sentence and the gloss, but not the translation. Starting from the second word of the original sentence, set the tabs manually by pointing and clicking on the ruler on top of the document window. You are aiming to put the tabs so that the word and its gloss are separated from the following word by about one or two spaces. This creates something like this:
- (20) My videli bol'sh-uju obez'jan-u v ogorod-e.
We saw big-ACC monkey-ACC in garden-OBL
'We saw a big monkey in the garden.'

Or, if you prefer more space between the words, you can move the tabs by simply clicking and dragging on them (make sure your sentence and gloss are still selected):

- (21) My videli bol'sh-uju obez'jan-u v ogorod-e.
We saw big-ACC monkey-ACC in garden-OBL
'We saw a big monkey in the garden.'

3.4 Resetting numbering to (1) or (0)

You can force Word to restart the numbering from whatever number you want. For example, if I am starting a new chapter and don't want the next example to be the number that follows (21), here's what to do.

- (1) Apply the *Numbered* style to the line and make sure your cursor is still on that line.
- (2) Go to Format>Bullets and Numbering, and select Restart numbering.
- (3) The end.

If you want the numbering to start with some other number, say, (0), you can do that as follows:

- (0) Apply the *Numbered* style to the line and make sure your cursor is still on that line.
- (1) Go to Format>Bullets and Numbering and click on Customize.
- (2) In the Start at field, type in "0."

There is no way that I've found to have numbering revert automatically to the number that follows (21); if you can figure out how to do that, let me know.

4 Creating/modifying heading styles

I find heading styles extremely useful; using headings allows you to organize your paper into subsections that can be cross-referenced in the body of the paper. Word also has a relatively good Table of Contents feature that works only if you use heading styles.

Word comes pre-packaged with several *Heading* styles, but you can change the way they look and how they are numbered. I did this for the styles you see here (I find the font in the default version really ugly). The default comes in a different font and may use different numbering.

To modify the heading styles, you basically go through similar steps as in creating a new style, but there are some important features to know about. To modify the *Heading 1* style to look as the heading of this section, I went through the following steps:

- (3) Go to Format>Style. Select *Heading 1* from the Styles list on the left, and click on Modify.
- (4) The simplest thing is to base this style on *Normal*, so make sure it is Based on Normal and is followed by *Normal* (unless you want it to be followed immediately by a subsection *Heading 2* or something.)
- (5) Then go to the drop-down Format menu. You can change anything you want about the Fonts (make them boldface, italic, all caps, small caps, change the font to Times New

Roman from the default (Arial, I think)), change paragraph indentation (see (12) in section 3.1), and so on.

The most important thing to get right is numbering, so:

- (6) From the Modify Style dialog box, go to Format>Numbering. This time, click on the Outline Numbered tab. The style I used doesn't have progressive indentation and assigns its heading numbers hierarchically (meaning that the third subsection inside section 2.3 is numbered 2.3.3, not 1.1.3). To check that it does, click Customize and make sure Level 1 is selected for the *Heading 1* style. Click OK.

Steps for modifying *Heading 2*:

- (7) When modifying the original style for *Heading 2*, make it Based on Heading 1 to save yourself some work.
- (8) To format numbering, go to Outline Numbered, click on Customize. Select Level 2 as the numbering level.
- (9) Make sure that Previous level number is set to Level 1. The little gray preview should read something like 1.1. You can check that this is all set correctly when you have multiple *Heading 2* entries; sometimes Word bugs out and decides to restart each Level 2 heading's numbering from the beginning.

Apply keyboard shortcuts to these headings if you like, or apply them to paragraphs from the Formatting toolbar. Here is what mine look like:

5 Heading 1

5.1 Heading 2

5.1.1 Heading 3

- (10) Numbered style
 - (a) Lettered style
 - (b) Lettered style

- Bulleted style (make this one on your own!)

Basically, once you get the initial idea, you can create all sorts of styles by exploring the formatting options for styles.

6 Cross-referencing

This is my favorite feature of Word. To see how it works, you need to have some text in an open Word document that appears in some sort of a numbered style, be it a *Heading* or a custom-created *Numbered* style. If you want to refer to an example in the text by its number, do the following:

- (11) Go to Insert>Cross-reference...
- (12) Select Insert Reference to: Paragraph number from the drop-down menu on the right.
- (13) Select Numbered Item from the drop-down menu on the left.
- (14) A list of all of your numbered items will appear. This includes all headings and numbered examples. Select the item you want to reference and click Insert.

If all goes well, your text should now contain a gray number (in the newest version of MS Word for Mac, the number is only gray when the cursor is on it). If I refer to a numbered example, it appears in the same format as it did in your style. E.g., item (14) or section 2 or subsection 3.1.

Word also allows you to refer to page numbers of various items in the same way, as in item (5) above on page 2 (the last four words/numbers in this paragraph were generated by this function and will be updated or changed if I move example (5)).

The key to using this feature is consistency. If you slip up and type in the cross-reference manually, Word won't know to update the number because it's just text on a page rather than a special environment it keeps track of.

If you are used to WordPerfect, OpenOffice and its cousins, and LaTeX, you should be able to appreciate this feature, since alternatives to Word require you to insert bookmarks/labels manually for all items you want to reference. What makes Word nice is that it generates these labels automatically for any numbered item and presents them to you in an organized list.

7 Making a template and organizing your styles

If you use different types of document formatting for different tasks, it makes sense to create templates for those tasks. Word has many of its own templates, which are housed somewhere in the Microsoft Office application folder. The details of location are too OS-specific to lay out here. Search your computer for files with a .dot (document template) extension; that should at least tell you the location of them all.

I prefer to have my most-used styles be available in the Normal template (the one that is applied to all new documents created in Word). To copy styles from a specific document to the Normal template so that they are available in all new documents, do the following:

- (15) Go to Format>Style and click on the Organizer button.
- (16) You will see two windows with lists of styles available in your current document and of styles available in the Normal template. You may copy styles back and forth between the two.
- (17) You may also delete styles that you created.

You can also save your document as a template.

- (18) Set up all the styles you are planning to use inside the document.
- (19) Go to File>Save As and select Document Template from the drop-down menu.

- (20) To use your new template, go to File>Open, select Enable Templates, and choose your template .dot file. Save your file immediately as a .doc file.
- (21) To use the template, replace the text in each style with whatever you need. All the styles from the .dot file will be available in your new document.

Conferences such as WCCFL and NELLS make you format your .doc file according to very specific guidelines. If you know how to use styles, you will have no problem following these guidelines, because both NELLS and WCCFL provide you with very well-made stylesheets which are basically templates:

http://www.cascadilla.com/wccfl/style/Wccfl_Stylesheet.doc

<http://glsa.hypermart.net/author/nels36-style.doc>

You can copy styles you like from these templates directly into your Normal template using the style Organizer.

8 Table of Contents

This is useful only in really long documents, such as your dissertation or an overgrown QP. To make a table of contents, go to Insert>Index and Tables and click on Table of Contents.

Every time you update or move sections/headings around your document, you will need to re-generate this table of contents to reflect recent changes.

Word updates most of its “gray fields” (such as numbered examples cross-referenced in the text) whenever you preview the document for printing, so this is the quickest and easiest method for updating things if you change your document. To do this, go to File>Print Preview. By the time you enter the Print Preview mode, all of your gray fields will reflect the new numbering.

To update the Table of Contents, though, you have to manually delete the old one and re-create a new one. It’s best to simply wait to create a TOC when you are finished with the paper.

9 Why Word still sucks

Word is wonderful in theory but not in implementation. The features I just described are somewhat buggy. They are especially prone to breaking when you are working on a long (and inevitably important) document such as a dissertation or a bloated QP.

So, BACKUP, BACKUP, BACKUP.