MIDDLESEX Community College

Tools and Technologies for Tech Writers 2024

Week 3

Microsoft Word

Notices

This document was prepared as a handout for the Middlesex Community College Tools and Technologies for Technical Writers class, Winter semester 2024.

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Contents

Working with styles

I am not a Word expert. The majority of this content was figured out with a lot of help from Google.

This content was originally developed with Word 2013. I now have Word 2021. Steps and procedures may be slightly different based on your version of Word.

Import a template

Use this to import a template into an existing Word document.

While you can import a template, it doesn't always go as planned. Most sites I've read mentioned that it's better to start with a new document.

1. Select **File** > **Options**.
2. Select **Add-ins**.
3. Set **Manage** to `Templates` and click **Go**.
4. Click **Attach** and find the `.dotx` or `.dot` file.
5. Click **OK**.

All the new and changed styles are now available in the style ribbon. You then need to apply styles as needed. For example, if the default paragraph style in the new template is called "para", you need to apply the "para" style to all the paragraphs with the "normal" style.

Convince Word to find personal templates

These instructions will be different for every version of Word, but hopefully these get you headed in the right direction.

Make sure you have Word templates (.dotx) in your `Custom Office Templates`, which is usually `C:\Users\`*User Name*`\Documents\Custom Office Templates`.

These instructions were determined using Microsoft Office 2021.

1. In Microsoft Word, select **File** > **Options**.
2. Select **Save** from the navigation pane.
3. In the **Default personal templates location** field, enter the path to where your Word templates are located.
4. Click **OK**.

If all goes well, when you select **File** > **New**, there should be a **Personal** option.
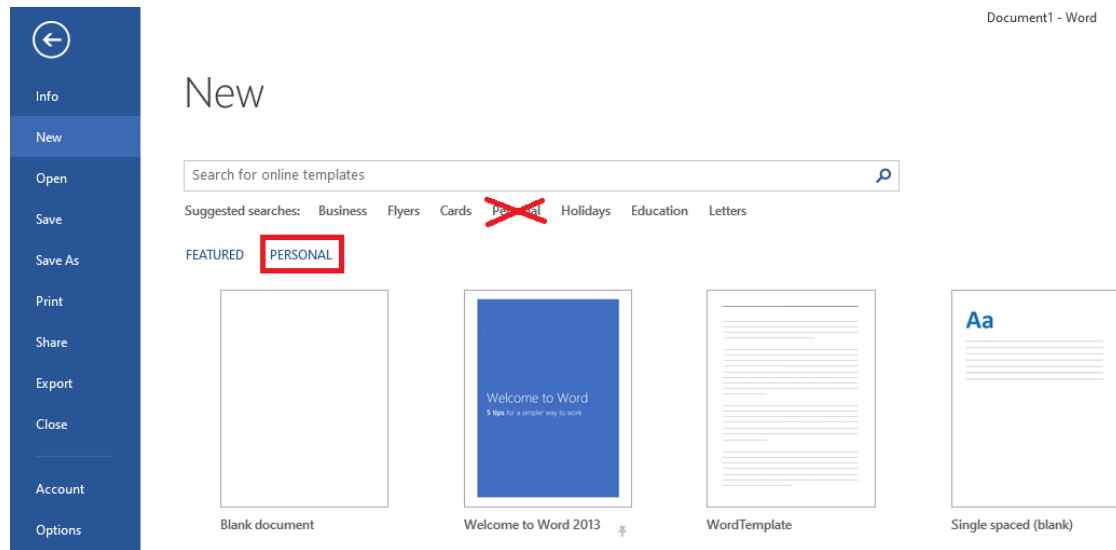
Create a new document from a template

Make sure that your `.dotx` files are in your `Custom Office Templates` folder. (`C:\Users\<`*YourUserName*`>\Documents\Custom Office Templates`)

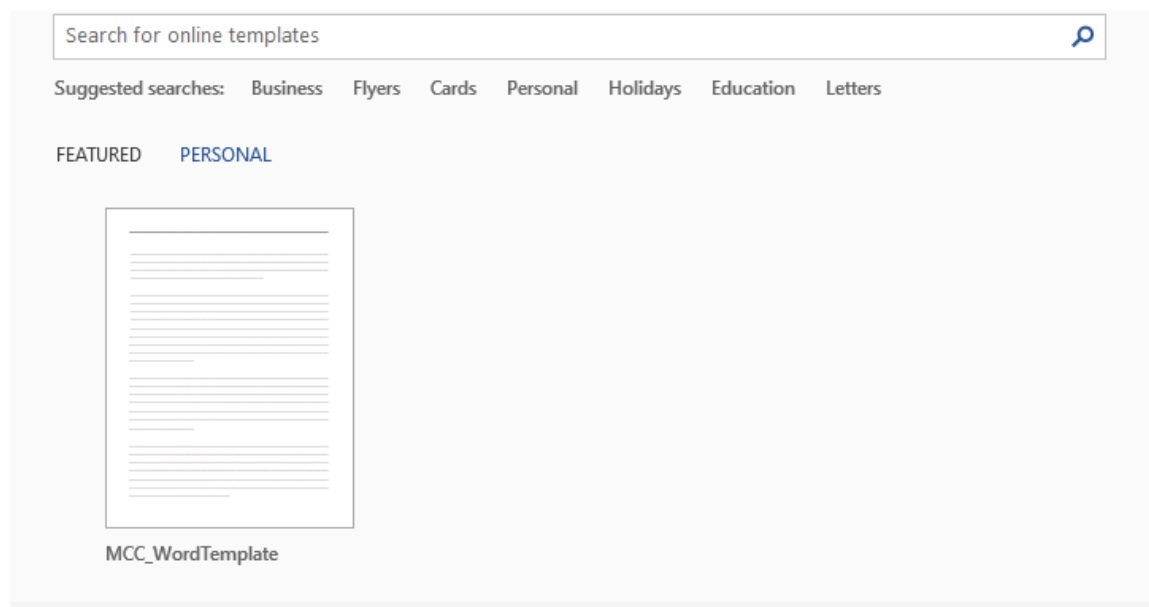1. Select **File** > **New**.

   Using `CTRL+N` doesn't get you to the template option.
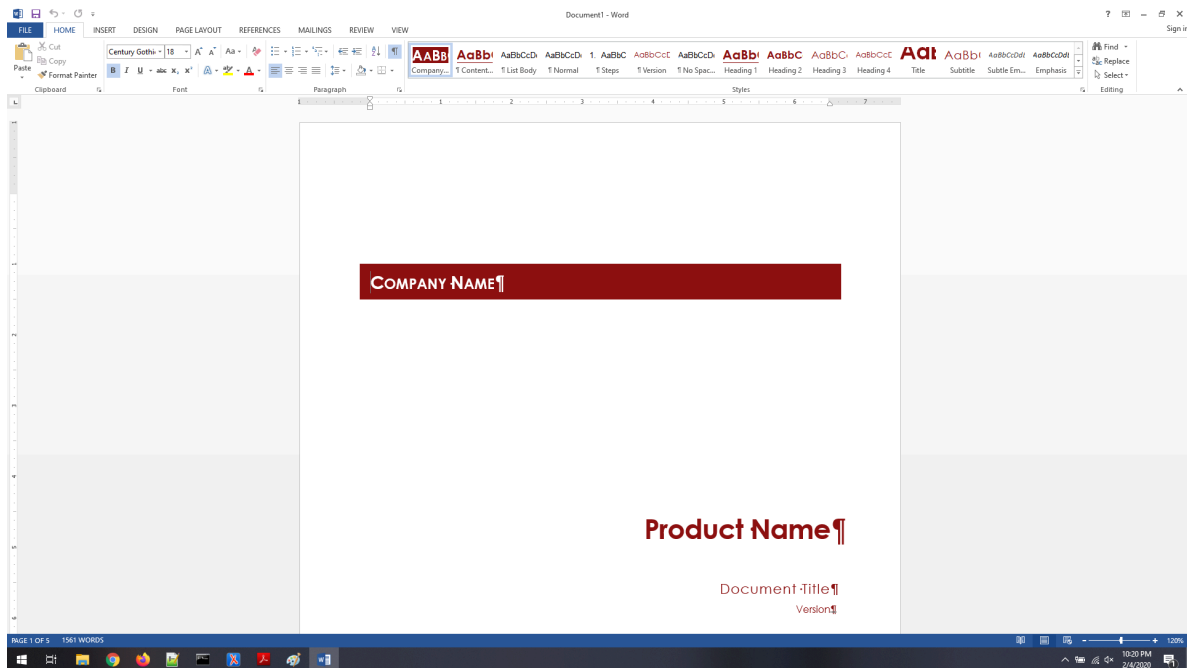2. Select **Personal** next to Featured.

   If you don't see the **Personal** option, you may need to click **More templates**, or follow the instructions in Convince Word to find personal templates on page 4.
3. Select the **MCC_WordTemplate**.

   You now have a new document using the MCC_WordTemplate.

Apply a style

Reminder, use styles. Do not use all the quick formatting tools Word makes so readily available.

1. Select the content you want to style.

   For a paragraph, you just need your cursor in the paragraph.

   For characters, you need to select the text you want to apply the style to.

2. Select the style you want to apply.

   The Styles ribbon is the quick way to see the most popular styles.

   You can click the icon in the lower right corner of the Styles ribbon to open the Styles panel (which you can dock or float). The Styles panel gives you more options, such as an easy way to make a new style.
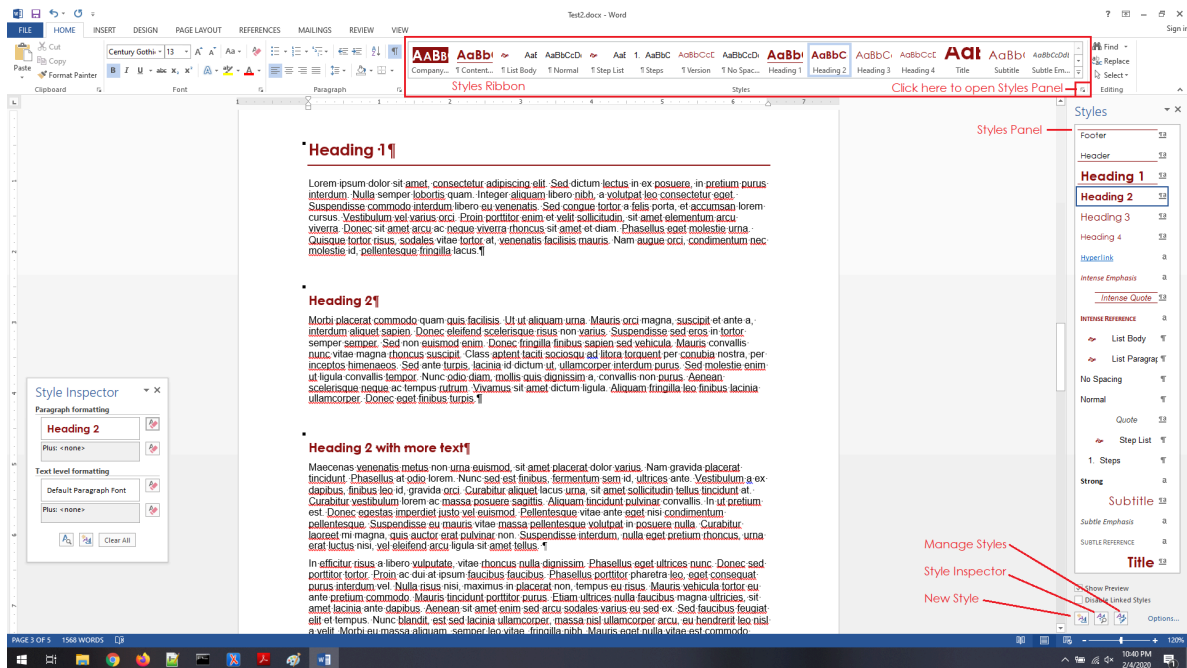
Modify a style

This is a brief explanation of the basics of making changes to styles. The internet is full of tips and tricks when you are looking for specific formatting effects.

1. Right-click a style from the Styles ribbon or Styles panel and select **Modify**.
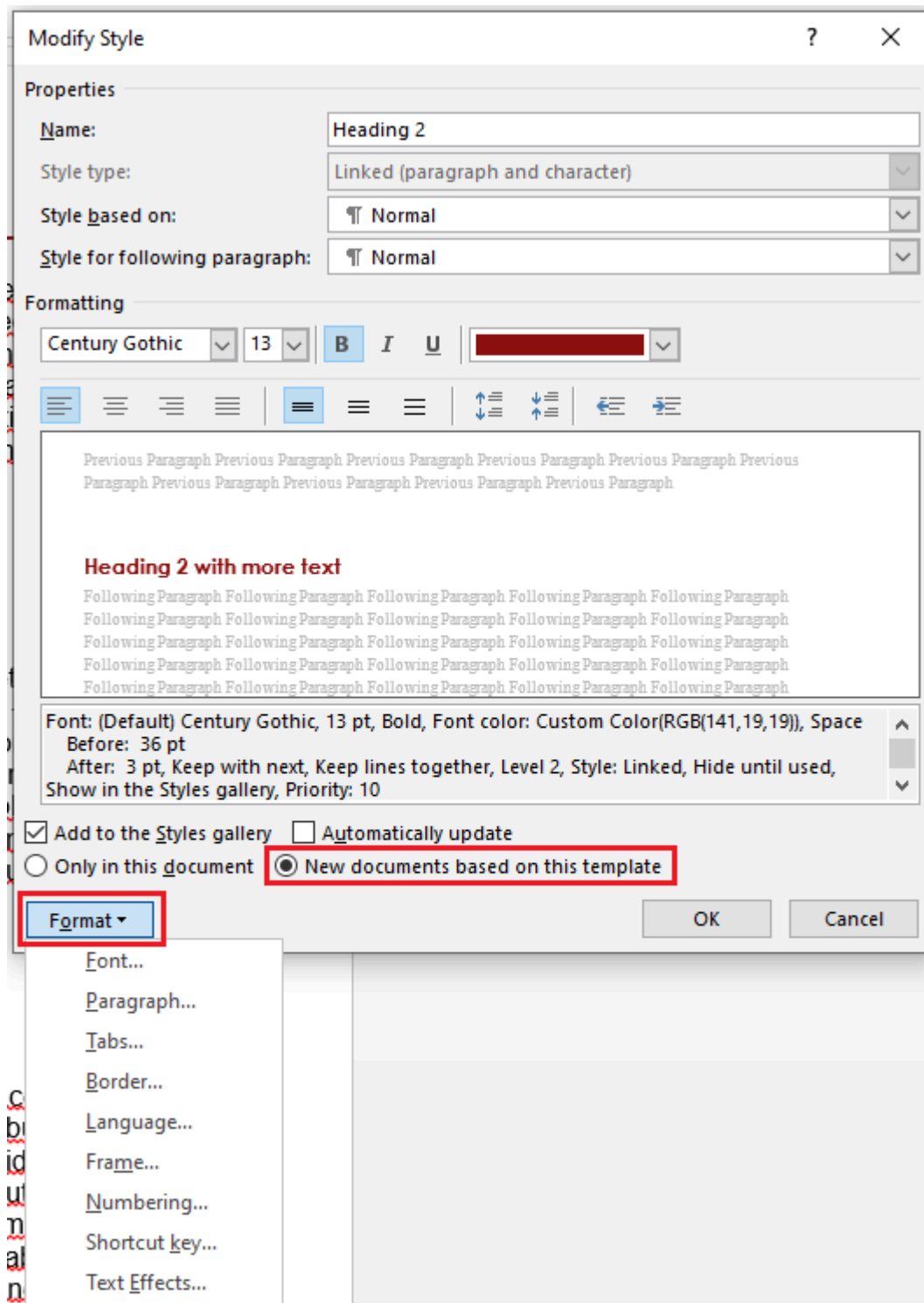
2. Make sure you select **New documents based on this template**.

3. Make your changes to the style. In general, you'll want to work from the **Format** menu.

Format Option	Description
Font	Set the font type, size, and color with more detial than what is available in the main Modify Styles dialog.
Paragraph	Set the margins, indents, and spacing with more detail than what is availalble in the main Modify Styles dialog.
Tabs	Define the tabs in the paragraph
Border	Add borders or fills to the text.
Language	Generally don't need to play with this, unless you are writing a multi-lingual document.
Frame	Gets into tricky formatting to do run-in headings
Numbering	Set up bullets or numbers.
Shortcut key	Constantly using a mouse is horrible. You can provide shortcuts such as CTRL+ALT+p for a particular style.
Text Effects	Generally, stay away from this for techincal documents. This lets you do fancy text formatting such as gradients. More useful for brochures. Maybe text on a cover.

Create a style

You may want to create a specific new style as you set up a template.

1. Open the Styles panel.

   See Apply a style on page 6 for details on how to open the Styles panel.

2. Click **New Style** .

   This opens the same Modify Style dialog as when you modify a style.

3. Provide a new name for the Style.

4. Edit the style the same as modifying a style.

   See Modify a style on page 7.

A few suggestions:

• It may help to base a style on another style. However, sometimes that also means if you change the original style, those changes cascade into styles based on it in unexpected ways.

• Style for the following paragraph can be very helpful. Usually its the same style, but if you have a particular style order, it can be very useful. For example, your style guide may have a special

"Procedure Heading". You could set the next style after "Procedure Heading" to "Step" so that it automatically does the heading followed by a numbered list.

- If you want to have the text of the style appear in something generated, don't make a new style, modify an existing one. For example, just modify the Heading 1, Heading 2, etc. styles for your headings. This way, the existing insert Table of Contents tools just work.

Master Documents

Word starts to have many issues once a document is close to a hundred pages. If you have lots of special features, such as cross-references and lots of images, it may have issues even sooner.

A lot of authoring tools get around the issue of too-large documents by having some method of linking together smaller documents. This way, content can stay in manageable chunks, but you can still have consecutive page numbers, cross-references that work, tables of contents, indexes, etc. Adobe FrameMaker has book files. DITA has ditamaps. Word has Master Documents.

Overly simplified, using the same template, you make short documents in units that make sense. For Adobe FrameMaker and Microsoft Word, that's usually chapter length. For DITA, which is a topic based system, it's usually much smaller, each section is a single file. (More on that later in the course.) In Word and FrameMaker, I've also heard of people who had to split up long chapters. Especially in reference manuals, some chapters can be over a hundred pages.

Once you have most of your chunks (or at least enough to get started with), you use whatever mechanism to organize the chunks into a single document. There are also usually mechanisms to generate common lists, such as tables of contents or indexes.

Creating a Master Document

I am not very familiar with working with master documents, and learned from a few web sites, such as https://www.dummies.com/software/microsoft-office-for-mac/word-for-mac/how-to-create-a-master-document-in-word-2013/.

Make sure you have a few of your "chunks" or sub-documents created before creating your Master Document.

All sub-documents should be using the same template. Whatever template you use for the Master Document will be used in the sub-documents.

Remember, things may be slightly different in each version of Word.

1. Open a new Word Document, using your template.
2. Go to the View tab.
3. Select **Outline**.
4. If you are not automatically redirected to the Outlining tab, go to the Outlining tab.
5. Select **Show Document**.
6. Make sure your cursor is where you want to insert the document.
7. In the Master Document section, click **Insert**.
8. Select the sub-document you want to include and click **Open**.
9. Repeat steps 6-8 until you have the whole document you want.
10. In the master document, insert a table of contents.

You may need to go through the master document and find all your numbered styles and make sure that you select **Restart at 1** for each new list. Otherwise the master document "helps" by treating all the ordered list items as one big long list.

Whenever you produce output by saving as or exporting to PDF, make sure all the subdocuments are expanded. Otherwise, you just get a PDF of the references.

Working with a Master Document

After you create the master document, every time you re-open the file, you have to manually return to outline view.

If you open a master document, and all you see is a list of hyperlinks to your other Word files, do not panic.

1. Go to the View tab
2. Select **Outline**.
3. If you are not automatically redirected to the Outlining tab, go to the Outlining tab.
4. Select **Show Document**.
5. Select **Expand Subdocuments**.

   Whenever you produce output by saving as or exporting to PDF, make sure all the subdocuments are expanded. Otherwise, you just get a PDF of the references.

Week 3 Homework

Take an existing Word document from a previous assignment and apply the `MCC_WordTemplate.dotx` template to it.

1. Get the `MCC_WordTemplate.dotx` file from Git.

   The `MCC_WordTemplate.dotx` file is in the `mcc_tools_tech\Week03-WordOffice \Homework` folder.

2. Place a copy of `MCC_WordTemplate.dotx` in your `Custom Office Templates` folder. (`C:\Users\<YourUserName>\Documents\Custom Office Templates`)

   According to the internet, on a Mac try `~/Library/Application Support/Microsoft/ Office/User Templates/My Templates`

   The User's Library folder is hidden in 10.7 and later, but you can go there by holding down `option` while clicking the Go menu in the Finder, then selecting Library.

3. Do one of the following:
   - Make a copy of an existing Word document and import the MCC_WordTemplate. See Import a template on page 4.
   - Make a new document from the MCC_WordTemplate and cut and paste your content from a previous Word document into it. See Create a new document from a template on page 4.
   - If you do not have a Word document available, make a new document using the MCC_WordTemplate and write a small how-to on the topic of your choice. Apply the styles defined in the template.

4. If you need a style that is not defined in the template, such as for a table or image title, add or modify and existing style.

5. When you are done, add the file to the `mcc_tools_tech\Week03-WordOffice\Homework` folder.

   Please have your name or initials in the file name.

Optional homework

If you find updating an existing document to use a new Word template is too easy, you can try to make your own template.

Designing templates is not as simple as it seems.

- Where will this be used? Online only? PDF and HTML? Just one, just the other? If you're converting, what tools are you using. Does your formatting in Word affect your formatting in the HTML transform?
- If you're making a PDF, is this online only or will it actually be printed? Do you need a cover for printing? Inner cover page? Back page? Spine? Artwork?
- What is your page size? What are your margins?
- Are you going to have left and right pages? Do chapters all start on the same page? Do you need "This page intentionally left blank"?
- What's in your headers? What's in your footers?

- Are you doing anything interesting, like having page tabs?
- Are you using color? (This gets way more interesting if you're sending to a printer) Single color with tints?
- What font are you using for headers?
- What font are you using for body?
- What inline fonts/formatting are you using? Cross-references and links, button names, field names, window names, tab names, file names, paths, terms, etc.? Are you going to use format-styles (bold, italic) or semantic styles (filepath, uicontrol, wintitle)?
- Table of contents? List of Figures? List of Tables? Index? Glossary? Preface? Chapter? Appendix? Parts?
- How are you formatting tables?
- Are you using Figure captions? Table titles? Example titles?
- Do you have special formatting for notes, tips, cautions, warnings? (Taking into account legal standards for hazard statements) Call outs? Side bars? Code samples?
- How are things numbered? Pages? Do you include chapter numbers in your page numbers? Do you include chapter numbers in figure and table numbers? Are your headings numbered (1.1, 1.3.4)? Are you using roman numeral page numbers for preface, etc.?
- When you're naming your styles, are there things you can do to make selecting them by key commands easier? Remember the people who will be using this template every day, what can you do to make their life easier?
- Are there things you'll have to set up to connect your content to your software?

Then you can start getting into additional specifics, such as graphic standards, etc.

You don't have to do all of these things when designing a template for class.

1. Create a new Word document, not based on a template.
2. Define at least the following styles:

   - Heading 1 through Heading 4

     Remember that Word is dumb and automatic things such as TOC require that you use the default headings.
   - Some sort of body text and 1 level of indent.
   - Some sort of bullet with two levels of style.
   - An ordered list with two levels of style
   - A note or tip style

3. For super imaginary bonus points, any number of the following:

   - A table style
   - TOC styles
   - Figure or table captions

More Optional Homework

If you don't feel like making a template, experiment with a Master Document.

You can see the example in `mcc_tools_tech\Week03-WordOffice\Homework\wDITA.zip`. This was a sample master document I did for a different course, so please ignore all the "for your final project" content in the examples.

If you make a master document, please create a sub-folder in the Homework folder for all your files.

Additional things to experiment with

As with most of the tools we are working with this course, learning Word could take an entire semester.

There are interesting things you can do with Word that might make it mildly less painful. These are a few things you might want to experiment with.

I don't know how to do all of these things. However, if I had to use Word for all my output, these are things I would look into.

I would also look into at least one of the *Word for Dummies* or equivalent books.

- Learn about Field Codes.

  There are a whole bunch of slightly obscured and completely hidden features in Word that you can use that involve Field Codes. For example, automatic page numbers are created using a Field Code. Word gives you quick ways to add them to headers and footers, but you can insert them manually in weird places, if you so choose.

  There's a field code you can use that let's you insert the value of a style. Therefore, if you only use the Version style once in your document, you can use this field code to insert the contents of the Version style. Then, to update the document to a new version, you should be able to change the text in the paragraph with the Version style, update all field values, and all the version numbers should magically update. (Theoretically)

  There's a ton more that Field Codes let you do. If you want to be a Word power user, figure them out.
- Understand how cross-references work.
- Figure out how to make an index.
- Understand how Track Changes works (or doesn't). When do you use it, when don't you.
- *Really* dig into styles. Understand how to manipulate them to your will, not the other way around.