Authoring in Word

The majority of authors and editors have traditionally used Microsoft Word, and for good reason: It is very, very good as a writing and editing tool.

Some people have poo-pooed Word, and word processors in general, as not supporting structured writing and editing. It is true that most authors (and many editors) don’t use Word as a structured document editor. But Word has very rich structural capabilities. Once you learn to use these capabilities, it is an excellent writing and editing tool. In my own work I have used Word very effectively to supply hundreds of manuscripts, from very simple to very complex, to the page typesetting and ebook composition processes.

In this chapter, I will explain how to use Word to do structured writing and editing. In a later chapter, I will talk about how to hook Word into an professional publishing workflow as a content source.

# Structured Writing and Editing in Word

## Paragraph Styles

Many authors are unaware of Word’s built-in support for paragraph styles, but paragraph styles are at the foundation of a professional publishing workflow, and learning to use them effectively can make your life as an author or editor much less frustrating.

For example, rather than using ALL CAPS or **bold** or *italic* type to indicate a first-, second-, or third-level heading, use one of the heading styles: “Heading 1,” “Heading 2,” and “Heading 3.” These styles are readily available both in the styles pane and on the keyboard.[[1]](#footnote-1) Similarly, use “Body Text” for regular paragraphs, “List” for a list, and so on. Word comes with a pretty good selection of styles built in. You can use these styles rather than extra returns, tabs, and bold/italic font formatting to indicate what each paragraph is, not just how it appears.

The built-in selection can, however, be improved. For example, “Chapter Title” is a better style name for the chapter title than “Heading 1”. So I have created a Word Manuscript template that adds a number of useful styles and keyboard shortcuts.[[2]](#footnote-2)

## Character Styles

Just as paragraph styles are better than using Return and Tab to format paragraphs, character styles are better than using direct bold or italic to format text. The primary reason character styles are better is that they give designers much greater flexibility in how they display bold and italic text. With direct bold formatting, the bold text will always be displayed with the bold weight of the same typeface that was used for the Roman (regular) weight text, and the italic version of the same typeface will be used for italic text. But sometimes this is not what designers want: They might want to use a semi-bold weight of the same typeface for bold, or even a different typeface altogether, to represent bold type. Similarly, they might want to use a different typeface for italic type. When you use character styles rather than direct formatting, you make it possible for the designers to have this flexibility without requiring them to hunt through your manuscript for instances of italic and bold text. They just need to define the style for the italic or bold character style, and they will get the results they wish.

For this reason, the BlackEarth Word Manuscript template binds new character styles called “bold” and “italic” to the keyboard shortcuts that are usually used for direct bold and italic formatting: Ctrl+B and Ctrl+I on Windows, Command+B and Command+I on macOS. If you write your manuscript from the beginning using this template and these common shortcuts, all of your bold and italic text will already be styled correctly for production, without your needing to do anything additional.

There are also situations where a different typeface is needed in-context to accommodate a different language or script. For example, a lot of academic manuscripts in Biblical Studies and Theology use Greek and Hebrew right in line with other text. In those cases, rather than limiting the design only to typefaces that support Greek and Hebrew, we can use “greek” and “hebrew” character styles. Then the designers can choose whatever typeface they wish for headings and body text, and use different typefaces for Greek and Hebrew type if they so choose.[[3]](#footnote-3)

## Footnotes and Endnotes

Word’s footnote and endnote capabilities are one of the things that makes it capable as a professional publishing tool. Generally speaking, you can use Word’s footnote and endnote capabilities while writing and editing your manuscript. The footnotes and endnotes should be carried through the entire publishing process, with correct automated numbering and bi-directional linking in digital formats.[[4]](#footnote-4)

## Tables

{TODO}

## Hyperlinks

{TODO}

## Bookmarks

{TODO}

## Indexing

{TODO}

## Document Properties and Variables

{TODO}

# Capabilities of Word to Avoid Using in Manuscript Writing and Editing

## Direct Formatting of Font, Paragraph, Column, Section, and Page

{TODO}

## Pictures, Clip Art, Shapes, Charts, Text Boxes, WordArt

{TODO}

# Collaborating with Others Using Word

## Tracked Changes (Redlining)

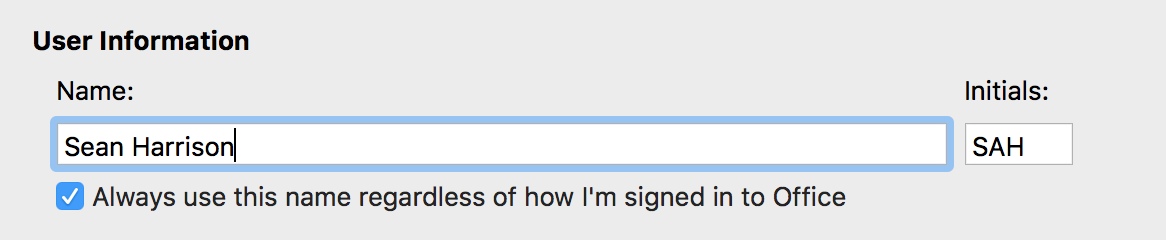
Word’s change tracking or “redlining” functionality is excellent. To use it, just turn “Track Changes” on in the Review ribbon, and Word will automatically track all changes that you and others make to the manuscript.

## Comments

Word’s built-in comment function enables various people to read a manuscript and make comments on it without changing the text. “Insert > Comment” is available on the “Insert” ribbon or menu. Others can then reply to the comments or mark them as resolved. This makes a very natural and easy-to-use way to interact regarding the content of a manuscript.

## User Information

Tracked changes and comments are connected to each user, and you can hover the mouse over a change to see who made it. However, on a lot of teams, the user name is often something like “Software Administrator,” because the actual user didn’t set up their own copy of Word. You want the correct name of the user to appear so that, when collaborating with others, you can have a conversation if one of you disagrees with a change. (Your user name also appears whenever you insert a comment.)

So, to make sure the correct user information appears, open Word’s “User Information” preferences and type your name and initials into the provided fields, if they are not already there.

# Questions People Ask about Word and Word Documents

## What about Future Proofing? Shouldn’t we be archiving our manuscripts in a future-proof format?

Yes, you should, which is why you should always store your Word documents as .docx files. This is the default in recent versions of Word, but to be sure, go into the Word “Save” Preferences and look for a line that says “Save Word files as:”, following which the drop-down menu should say: “Word Document (.docx)”. If it doesn’t say that, change it to that.

The reason for using .docx format for Word Documents is that .docx uses XML for all of the content data, and ZIP to compress all of the XML into a single file. Both ZIP and XML are industry-standard technologies—they are being used by just about everyone for just about everything. For example, an EPUB ebook is just a ZIP file with XML inside of it.

In the 1980s and 1990s, there were no standards for file formats, so software vendors created a lot of incompatible proprietary formats. But then, as the web started taking off, we began to see the benefit of being able to share content in standardized formats. There was also a strong movement toward using XML as a standard way to format content. Eventually someone came up with the idea of packaging XML inside of a ZIP file as a way of creating a cross-platform file format (ZIP is a public-domain archive compression format that was first released in 1989 and began to be very widely used to compress and archive files and folders.[[5]](#endnote-1) The idea of using XML inside ZIP caught on. Since 2007, Microsoft Office[[6]](#endnote-2) and Libre Office[[7]](#endnote-3) have both used this method as the default file format storage mechanism. EPUB, also released in 2007, is essentially a website inside a ZIP archive, with a couple of other XML files to indicate reading order and such.[[8]](#endnote-4)

Some people worry that these formats are less future-proof than plain text, but it is in fact extremely unlikely that either ZIP for compression or XML for content data will ever be superseded in the foreseeable future. The global adoption of these technologies was a process that took 40 years to complete, and it is likely that the world will continue to use them at least for the next 40 years. Even if something comes along to replace ZIP and XML as the primary storage format, the tools required to work with them are freely available and ubiquitous, so it will always be possible to read, process, and write files in these formats.

The result of all of this is that, at least since 2007, if you are using the default .docx file format of Microsoft Word, you are already storing your manuscripts in a future-proof format, and you don’t need to worry about it at all.

1. On Windows, hold down Ctrl+Alt and then press 1, 2, or 3 in order to make the current paragraph Heading 1, 2, or 3. On macOS, hold down Option+Command and then press 1, 2, or 3. [↑](#footnote-ref-1)
2. You can download the template, with instructions, here: <https://github.com/BlackEarth/word-manuscript>. [↑](#footnote-ref-2)
3. Excellent, production-quality Greek and Hebrew fonts are available for free from SBL (Society for Biblical Literature) and SIL (Summer Institute of Linguistics):  
   SBL Greek: <https://www.sbl-site.org/educational/BiblicalFonts_SBLGreek.aspx>  
   SBL Hebrew: <https://www.sbl-site.org/educational/BiblicalFonts_SBLHebrew.aspx>  
   Galatia SIL (Greek): <http://scripts.sil.org/cms/scripts/page.php?site_id=nrsi&id=GalatiaSIL>  
   Ezra SIL (Hebrew): <http://scripts.sil.org/cms/scripts/page.php?site_id=nrsi&id=ezrasil_home>  
    [↑](#footnote-ref-3)
4. I say should because the production specialists should know how to do this successfully without any extra work on the part of the author or editor.

   Unfortunately, the most common note format, endnotes, is not supported well by the most common page layout program, InDesign. The solution to this conundrum is to avoid using InDesign’s Word import and instead to use an XML-based workflow to convert Word manuscripts to InDesign. One such workflow is the Publishing XML workflow (see <http://publishingxml.org)>. See further the chapter on production workflow. {TODO} [↑](#footnote-ref-4)
5. For a short history of the ZIP file format, see <https://en.wikipedia.org/wiki/Zip_(file_format)>. [↑](#endnote-ref-1)
6. Microsoft Office: <https://en.wikipedia.org/wiki/Microsoft_Office#File_formats_and_metadata>. [↑](#endnote-ref-2)
7. Libre Office uses OpenDocument as its standard file format: <https://en.wikipedia.org/wiki/OpenDocument>. [↑](#endnote-ref-3)
8. EPUB: <https://en.wikipedia.org/wiki/EPUB>. [↑](#endnote-ref-4)