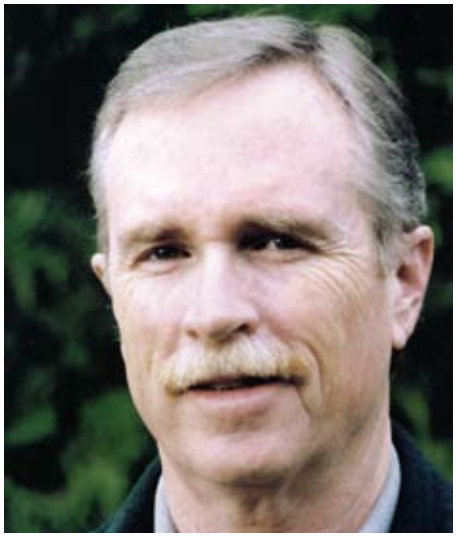
Timothy Perrin

Top 10
MS Word Tricks



The Society was kind enough to invite me to Whistler in September to give a workshop at the first Society of Notaries Public Technology Conference.

Unfortunately for me, I was unable to make it. Fortunately for you, I'm going to spend this column sharing with you what I was going to talk about at the conference, had I gone: 10 tips to optimize your use of MS Word.

A. Use Templates

Whenever I need to hire staff, I ask that they submit their résumé electronically. I want to know whether an applicant uses a template to format the document or "brute force" formatting. Are there two carriage returns separating paragraphs? Are paragraph first-line indents produced by hitting the tab key? Or is everything handled by the subtle elegance of MS Word styles?

If you are not using templates, you are barely tapping 5 percent of the power of MS Word. Skillful use of templates and their built-in styles is the difference between a Word tyro and a power user.

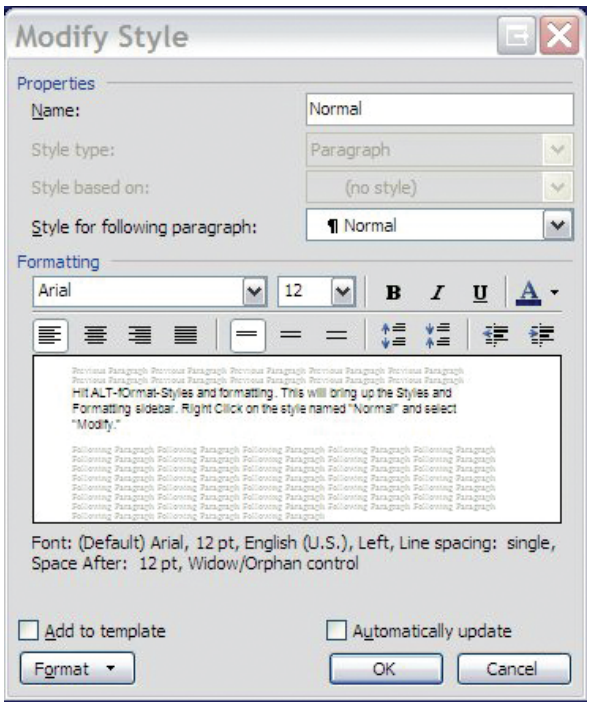
A template contains all the formatting for documents you use regularly and can, if you want, contain macros to automate tasks related to those documents.

Figure 1

You are already using a template called Normal.dot, whether you know it or not. It is the underlying template for all documents that don't use another template. Let's use it to illustrate how you can use templates to control formatting in your documents by making a few changes in it.

1. Start by opening a new, blank document in Word. Type in a few paragraphs. It doesn't matter what they say. They can be complete gibberish.
2. Now, hit ALT>format>Styles and formatting. This will bring up the Styles and Formatting sidebar (Figure 1).
3. Right-Click on the style named "Normal" and select "Modify." This will bring up the Modify Style dialogue box (Figure 2).

Figure 2



4. The first thing we're going to do is modify the font. Under "Formatting," where it lists the font, right-click again to get a dropdown box of available fonts (Figure 3). Choose something other than what you've currently got. It doesn't matter what. While you're at it, change the size and make it italics.

Figure 3

5. Click "OK." Instantly, you'll see that everything you've written changes fonts!

Now, put your cursor in any one of the paragraphs you've got on your screen. Scroll up or down until you find the "Heading 1" style in the Styles and Formatting sidebar. Double-click on it. Instantly, the paragraph will change to the "Heading 1" style.

Are you starting to see the power here?

You don't need a lot of styles in a template for it to be useful. Usually you need only 3 or 4 headings, a header and a footer style, perhaps a footnote style, and your normal style. You'll come up with others as you need them.

B. Use RTF File Format

I also demand that applicants submit résumés in RTF format. RTF stands for "Rich Text Format." It is basically a Microsoft DOC file without any macros. It contains all the same formatting, all the fonts, tables, and layout nuances as a regular MS Word file, but there is no possibility it can infect anyone's system with a virus.

MS Word files are some of the most dangerous files in existence. The "macro" programming language in MS Office is extremely powerful. It can take over your system and make it do all kinds of things without your even knowing. In 1999, the nefarious Melissa virus was spread through an MS Word DOC file. NEVER accept an MS Word DOC file from anyone, no matter how trusted you think they may be. Just delete it and email your source telling him or her to resend it in RTF format.

To make RTF your default file format, use Tools>Options and select RTF as the Default Format near the bottom of the Save tab (Figure 4).

Figure 4

To save an individual file in RTF format, use File>Save As and select "Rich Text Format (*.rtf)" in the "Save as type" drop-down box.

C. Turn On Macro Protection

You are undoubtedly still going to have to deal with the odd MS Word DOC file. To protect yourself against malicious macros lurking in those files, you need to turn on macro virus protection in Word. Use Tools>Options. On the Security tab, click the Macro Security button. Unless you have good antivirus software that knows how to check for MS Word viruses, check at least "Medium."

D. Pick Two Fonts. Get Rid of The Rest

Look at any well-designed magazine or newspaper. It uses one font for the headlines—usually a sans-serif font—and another for the body text.

Just two.

Take the hint.

E. Re-Create Your Basic Documents as Templates

I have 4 or 5 templates that I use all day long: my letterhead, a telephone note template, a memo template, an envelope, and an invoice (basically the letterhead with some information added). Create those basic templates for your own office. You'll be glad you did.

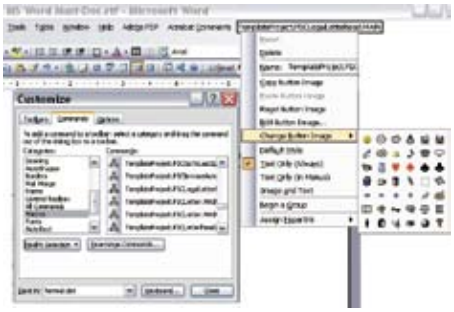
F. Learn to Record Macros and Assign Them to Buttons

At the bottom of your MS Word screen, look for REC. This is the macro recorder. Double click on this and Word will record what you do until you tell it to stop. Then you will be able to easily reply that sequence again and again.

Once you have created your letterhead, let's say, record a macro to load your letterhead automatically. The keystroke sequence would be ALT>File>New then you'd have to mouse to select the templates on your computer, then you'd have to choose your letterhead macro. That is at least 4 or 5 keystrokes and a mouse movement.

But once you've recorded that as a macro, you can use the Tools>Customize command to assign it to a toolbar button (Figure 5). Then you'll be able to load your letterhead with one click.

Figure 5



G. Use the Keyboard, Not the Mouse

Learn to use keyboard shortcuts for commands and quit using the mouse. It's faster and you're less likely to

experience repetitive strain injuries caused by too much mousing. (But remember to take frequent breaks from keyboarding.)

H. Learn to Use the Outliner

Fifteen years ago, outliners were a separate category of software altogether. Take advantage of the power of Word's built-in outliner.

You can assign styles to the outline levels as well and use the outline to create and manipulate your document easily.

I. Set the Table

Word's tables are exceedingly powerful. They are mini-spreadsheets capable of doing all kinds of math. They make many difficult formatting-problems easy. Take the time to learn how to use them.

J. Don't Switch to Word 2007!

Microsoft, for some reason, has completely changed the interface in Office 2007. Everything you know about using all Office products just became obsolete. Why Microsoft took this step is anyone's guess.

But if you are even considering switching to Office 2007, why not switch to OpenOffice.org 2.0? This is a free office suite created by Sun Microsystems, so it's not a rinky-dink piece of software. If you are going to go to the trouble to retrain yourself and your staff on new software, why not make it something free?

This has been a quick overview of some features of MS Word. Learning Word thoroughly has been an ongoing job of mine for close to 20 years, so don't expect to become a Word expert overnight. By beginning to master templates and stylesheets, creating templates of your primary office documents, and beginning to record and use macros, you'll start to unlock the hidden capabilities of MS Word. ▲

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