Take Control

of What's New in Word 2004:

Advanced Editing & Formatting

by Matt Neuburg

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Welcome to *Take Control of What's New in Word 2004: Advanced Editing & Formatting,* version 1.0.

This ebook will ease your transition to Word 2004 by explaining new techniques for typing and pasting, using styles, handling Unicode and special characters, and working with markup. This ebook picks up where its companion volume, *Take Control of What's New in Word 2004,* leaves off. This ebook was written by Matt Neuburg, edited by Caroline Rose, and published by TidBITS Electronic Publishing.

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Basics

In reading this ebook, you may get stuck if you don't know certain basic facts about Word or if you don't understand Take Control syntax for things like working with menus or finding items in the Finder. Please note the following:

- **Menus:** This ebook sometimes instructs you to choose, or describes someone as choosing, a command from a menu in the menu bar. In such cases, the command is specified starting with the menu title in the menu bar and proceeding down the hierarchy. Menu titles and menu item names are separated by a "greater-than" sign. Thus, to describe the command you choose to customize the keyboard in Word 2004, I would speak of Tools > Customize > Customize Keyboard.

- **Default interface:** Because Word's interface is so heavily customizable, I can't know what your interface looks like, so I describe the default interface. If you've rearranged commands within menus, changed command names, altered keyboard shortcuts, or changed the buttons on toolbars, you may not see what I'm describing. You can restore the default interface by choosing Tools > Customize > Customize Toolbars/Menus and (in the Toolbars pane) clicking Reset after selecting the item listed on the left that you've customized. You can restore default keyboard shortcuts, if need be, by choosing Tools > Customize > Customize Keyboard and clicking Reset All.

- **Revealing the interface:** Some parts of Word's interface can be shown or hidden at will. Although I try to be helpful and explicit about how to reveal a particular piece of the interface, I also assume you know how to use Word, so I don't repeat myself every time by giving complete instructions. Here's a quick reminder: To show a toolbar, choose its name from the View > Toolbars menu. To show the Formatting Palette, choose View > Formatting Palette. When I speak of Word's preferences, I mean the dialog you get when you choose Word > Preferences (which, oddly, is impossible unless Word has at least one document open).

> **IMPORTANT** As we started to collaborate on this ebook, editor Caroline Rose and I ran into a big problem; we weren't seeing the same menus and toolbars. After 3 days of confusion, we discovered that Word conceals a major trap: *there is a "secret" mode consisting of a completely different set of menus and toolbars!* You can easily enter this mode accidentally by pressing a keyboard shortcut that triggers it. By default, there are two such shortcuts: Control-5 and Control-8. To find out if you are in this mode, look for a command View > Word 5.1 Menus (which will have a check mark next to it). If you see it, choose it, and the standard Word 2004 menus and toolbars will reappear.

INTRODUCTION

Let's face it: Microsoft Word is a big, complicated program. That's because, over the course of its history, new features have been added but old features have rarely been revised or taken away. Bit by bit, layer upon layer, version after version, Word has undergone successive accretions like a stalactite or a coral forest. Even attempts at simplification have merely increased the vast repertory of complexity. Users can't figure out how to use the menus? We'll add toolbars. Users can't figure out the toolbars? We'll add palettes. Users don't understand styles? We'll autoformat as they type. From version to version, features change their behavior, their interface, or their name; often both the old and the new behaviors, interfaces, or names remain side by side. The result is that everything can be accomplished in five different ways in six different parts of the interface, each intended to be easier than the one before, but in fact adding to the overwhelming sense of redundancy and complexity that confronts the user.

Under these circumstances, a new version of Word always brings new challenges for the user. Word 2004 is no exception. It has even more preferences, more ways to accomplish the same thing, more layers plastered over the features you'd just gotten used to in the previous version. When you upgrade to Word 2004, you notice this immediately. Even a simple action such as pasting or typing has unexpected effects: "smart buttons" spontaneously appear in your document. If you use markup, it's shown in a whole new way: "balloons" appear off to the right of your text. The entire document seems to have come alive with new forms of decoration and animation. It's all very cute, but you're probably asking yourself: "How am I supposed to get any work done? How do I incorporate these new features into my own activities and habits?"

Well, don't worry. This book is here to help you. With it, you'll be able to make the transition to Word 2004 quickly and completely. In no time you'll be a total expert at the most important new features of Word. What's more, you'll be armed with specific strategies for using those features effectively and smoothly.

In a companion volume, *Take Control of What's New in Word 2004,* I describe the upgrade process and survey all the areas of Word in which this version brings changes. In this book, I go into full detail

about some aspects of Word 2004 where the changes are particularly significant and extensive. This book repeats a little material from the other volume, but on the whole the two volumes are different. They've been written to be read independently, but you can also read them as a pair to get the most from Word 2004.

The areas of Word 2004 treated in this book are typing, pasting, styles, Unicode, and markup. All these areas have to do with editing and formatting, so they're crucially important; you can't avoid them. Any moderate-to-advanced user needs to understand what's new with autocorrection, pasting, and styles; these are features you use all the time. Anyone who uses, has used, or ever will use a writing system other than English, or even just a few special symbols or diacritical marks, needs to understand the sea change brought about by Word 2004's long-awaited savviness in the world of Unicode. And for editors and authors who collaborate using markup, a command of the new markup features is critical to their workflow.

In this book, as in *Take Control of What's New in Word 2004,* I've made certain assumptions about you as a reader. I assume that you know Word already; I explain what's new in Word 2004, not all of Word itself. In particular, I assume that you know the previous version, Word X; it is against Word X that I gauge what is new, and in need of explanation, in Word 2004.

QUICK START TO ADVANCED EDITING AND FORMATTING

To use this section, find the heading that describes your situation or your interests and then follow its suggestions.

You're looking for a list of Word's new features for editing and formatting text:

- Turn to New Editing and Formatting Features. If you spot a feature that you want to know more about, flip to the indicated section to learn more.

You want to understand changes to the way everyday typing and editing works:

- Learn to harness the power of AutoCorrect Smart Buttons. Here you'll also find answers to such questions as: "Why is it that every time I type a fraction like '1/2', Word changes it to a single character?" and "Why does Word capitalize the first word of every table cell I type even though I turned off auto-capitalizing?" and "How can I stop the AutoCorrect smart buttons from appearing?"

- Discover subtle (and not so subtle) changes in the way pasting works. See Paste Options Smart Buttons.

- Learn about an improvement to automatic list numbering. See Numbered List Smart Buttons.

You want to know more about styles:

- Understand how Working with Styles has changed in Word 2004.

- Learn about an important new way to view and edit styles via the Formatting Palette. See Styles and the Formatting Palette.

- Find step-by-step instructions for creating Table Styles and List Styles.

You're concerned about fonts or languages:

- You may have been distressed in the past when certain characters appeared as underlines. You may be confused now when certain characters appear as boxes. You may be excited that Word 2004 allows you to enter international characters, and you want to know

how to do it. Read Entering Special Characters to find out more, and if you want to know the nitty-gritty, read Unicode Support in Detail.

You want to put comments in a document, keep track of your edits, or edit a document collaboratively:

- Find an overview of new features for inserting comments or keeping track of edits in Using Markup, and learn about The Reviewing Toolbar.

- Read about how to view comments and edits in the right margin in Page Layout view in The Balloons. Find out about yet another way to view them in The Reviewing Pane.

- Once you know the basics of the various markup features, find out how to work with them effectively in How to View Markup and How to Deal with Markup.

- Learn to use Revision-Level Document Protection to guard your markup and text from accidents. Learn how to remove confidential information in Other Markup Security.

NEW EDITING AND FORMATTING FEATURES

This section provides an overview of the ways in which the editing and formatting features in Word 2004 differ from those of its predecessor, Word X, and helps you decide which parts of the book to read in more detail right away.

- **AutoCorrect:** AutoCorrect and AutoFormat As You Type now cause a smart button to appear, allowing you to undo the effect of the change or to toggle off the correction or formatting feature. See Typing and Editing, especially AutoCorrect Smart Buttons.

- **Copy and paste:** Pasting now causes a smart button to appear, allowing you to specify how the pasted material should be formatted. See Typing and Editing, especially Paste Options Smart Buttons.

- **Bullets and numbering:** Creation of a numbered list now causes a smart button to appear, allowing you to specify whether the numbering should continue from a previous list. Indentation of numbered lists can be changed simply by dragging. See Typing and Editing, especially Numbered List Smart Buttons. Also, bulleting and numbering schemes can be codified and applied through a new kind of style, the list style. See Working with Styles, especially List Styles.

- **Style details:** The cascade of modal dialogs when you want to modify or create a style has been reduced. See Working with Styles, especially The Style Dialog. Also, there is a new way to learn that a paragraph has additional formatting beyond its style definition, and to select all paragraphs having a certain style. See Styles and the Formatting Palette.

- **Table styles:** A new kind of style, the table style, extends the notion of table autoformatting so that you can now define and apply your own table formats. See Working with Styles, especially starting with Table Styles.

- **Unicode:** Word 2004 is Unicode-savvy. Any Unicode character can be entered, and cross-platform documents containing previously problematic characters may now be legible. See Entering Special Characters. On the other hand, existing Macintosh documents that use characters in older specialized fonts may have new problems. See Unicode Support in Detail.

- **Comments:** A comment can be displayed in the document itself as a balloon in Page Layout view. The display of comments in the Reviewing Pane (formerly the Comments Pane) can no longer be filtered by author, but the display in the document itself can be. Commented text is marked by brackets rather than by highlighting. See Using Markup.

- **Revisions:** Revisions (changes performed with Track Changes turned on) are now displayed like comments: they can be displayed as balloons in Page Layout view and are listed in the Reviewing Pane (formerly the Comments Pane). Changes to formatting are now properly reported. The Reviewing toolbar has been heavily reworked, providing four modes for viewing revisions in different ways. You can strip author names when saving a document, for security. See Using Markup.

Some details of what happens when you're simply typing and editing in a document have changed in Word 2004. This section discusses those changes, some of which could affect your Word work habits. The section concentrates on a new kind of interface item, *smart buttons*. These buttons now appear in connection with several Word features, such as AutoCorrect, pasting, and bulleted and numbered lists.

AutoCorrect Smart Buttons

Before I talk about AutoCorrect smart buttons, here's a quick reminder of what AutoCorrect is. Nothing in this next paragraph is new in Word 2004 (though Word 2004 does do some new kinds of autocorrection).

AutoCorrect, together with its close cousin AutoFormat As You Type, changes the details of your text as you type it. This is one of those Word features that's extremely useful in moderation but maddening when it goes to extremes. To keep it from going to extremes, choose Tools > AutoCorrect and set the options the way you want them. In the AutoCorrect pane, I like to check "Replace text as you type," because it helps me avoid common typing errors; for example, if I type "teh" instead of "the", AutoCorrect changes it to "the" for me. And in the AutoFormat As You Type pane, I check the option to replace straight quotes with smart quotes. I generally disable the other features of AutoCorrect and AutoFormat.

Whatever your AutoCorrect settings, it's likely that sooner or later, as you type text in Word 2004, it will perform an AutoCorrect or AutoFormat action. And when it does, something new in Word 2004 may happen: a smart button appears in your document. There are many circumstances under which these buttons can appear, because there are so many AutoCorrect and AutoFormat actions, and the options offered by the button differ slightly in each case. Rather than describe every possibility, I'll give a couple of examples.

Automatic bulleted lists

Suppose you've checked "Automatic bulleted lists" in the AutoFormat As You Type pane. This setting means that if you start a paragraph with an asterisk (followed by a space or a tab character), Word may

Please pretend that I inserted here the usual lecture on "Why It Is Good to Use Paragraph Styles in Word," which can be found in many books, articles, and Web pages. Such lectures are absolutely right. If you're going to write a document longer than about two sentences with Word, it's a good idea to use paragraph styles, which will give your document structural consistency. And if your document has a hierarchical structure such as chapters or sections (like this book), it's a good idea to use the Heading styles to delineate that structure, because many Word features expect this. OK, end of lecture! This book is about Word 2004, not about how to use Word in general, so I'm going to assume for the rest of this section that you know what styles are and why it's essential to use them.

Styles, while essential, are also a headache in Word. The interface for working with them is often clumsy and unhelpful, and sometimes complex and incomprehensible. Plus, in addition to paragraph styles, there are also character styles; the interplay between the two is tricky, and you access them both through the same interface, which makes them harder to use.

So now you're probably wondering whether Word 2004 will provide some much-needed relief from the misery of working with styles. Well, ever-optimistic reader, I have good news and bad news. The good news is that the interface for working with styles is somewhat improved in Word 2004. The bad news is that the underlying mechanics of styles have not changed one iota. To top it all off, in addition to paragraph styles and character styles, Word 2004 adds two more style types to the brew: list styles and table styles.

The Style Dialog

Start up Word X. Now, quick—modify a style. Go ahead, I'll wait. Let's say the style is Heading 1, its font size is currently 16 points, and you want to make it 18 points. (And no fair redefining the style from a selection; I want you to use the Style dialog.)

First you open the Style dialog by choosing Format > Style. Then you find Heading 1 and select it. But you can't actually modify the style here, so you click the Modify button. Now you're in *another* dialog, the Modify Style dialog. But guess what? You can't actually modify the

Here's your Romanian lesson for the day. When you're lost in Bucharest and a kind lady helps you, and you want to thank her, say this:

<div align="center">

Mulțumesc!

</div>

Pronounced "mool-tzu-MESK," this is Romanian for "Thank you."

Now that you've broadened your linguistic horizons, I hope you're wondering how I typed the character that looks like a "t" with a comma under it. You *should* be wondering, because the presence of this character represents a major revolution in Word. Until Word 2004, this character, and thousands of other characters used in languages around the world, couldn't be used in Word on Mac OS X.

One of the key features of Mac OS X is that its underlying text system is Unicode. This means that text in Mac OS X can display any of about a million different characters and symbols. But when Word was originally ported to Mac OS X, it wasn't Unicode-savvy. Certain writing systems, such as Asian languages, were handled in a special way that allowed them to be used, but Word couldn't deal with most Unicode characters at all. There was no way to type the Romanian word for "Thank you" in Word; if you opened a document containing it, or if you typed it in a program that *was* Unicode-savvy (such as TextEdit) and then copied it and pasted it into Word, you'd see an underline where the fourth character should be.

All that has changed. Word 2004 can display any Unicode character. Some legacy documents may require conversion, and there are still some technical limitations (see Unicode Support in Detail), but most users who work with languages will find that they can satisfactorily use Word to display documents and enter characters that were previously impossible.

Use the Character Palette

In this section, we'll practice entering a special character using the Character Palette. We'll use the Romanian word for "Thank you" as an example.

You learned about Word 2004's new support for special characters (Unicode) in the previous section, Entering Special Characters. This section goes into more detail about how Word's Unicode support works with respect to fonts, how some old documents and fonts may give you trouble, and how Word still falls short of the full Mac OS X Unicode standard.

Understand How Unicode Fonts Work

A font containing every special character would be huge, because Unicode has so many characters (about a million, in theory, though fewer than 100,000 are currently defined). No font contains every special character; instead, fonts specialize. One font might contain chiefly Cyrillic characters and would be intended for Russian and similar languages. Another font might contain chiefly Arabic characters, another mathematical symbols, and so forth.

You might think this would make using fonts a nightmare, but in practice it's not a problem, because when you enter a character that isn't contained in the current font, it's entered in a font that does contain that character. You can see this in the earlier example of entering the "is an element of" character:

$$s1 \in s2$$

The surrounding text is in the Arial font, but Arial doesn't contain the "is an element of" character. When you enter that character, a font is chosen for you that does contain it. (On my machine, that font is Symbol.)

An interesting corollary is that if you try to change the font of selected text, you may not be allowed to. For example, if you select the text of the "is an element of" example above and change the font to Times New Roman, the font of the "s1" and the "s2" will change, but the font of the "is an element of" character will not, because the Times New Roman font doesn't contain that character.

Using Markup

The visual presentation of markup has changed in Word 2004. In a moment I'll summarize the changes, and then I'll describe the possible repercussions of those changes on your working methods. But first, here's a quick reminder of what markup is. It embraces two things:

- **Comments:** A comment (or annotation) is like a Post-it note or a scribble in the margin: it's not part of the document's text, and it's a useful place for a reminder to yourself or a remark to someone else who will collaborate on the document.

- **Revisions:** A revision (or tracked change) is any change you perform on a document, such as deleting text, typing text, or altering formatting, at a time when the document is set to remember such changes. Word can report what changed at each point in the document, and it lets you accept or reject each change separately.

Each item of markup is attributed to some reviewer (or author). The reviewer's name is the name that appears in Word's User Information preference pane for that copy of Word.

HISTORICAL NOTE The reason for the parenthetical alternatives above is that different terms are used in different places in Word. This inconsistency results from the checkered history of these features in Word. Comments were originally called annotations, and the latter term still appears occasionally in the online help. Tracked changes were originally called revisions, and the markings that indicate them in the document are still called revision marks; in at least one place in the interface they're also called edits. An author is called a "reviewer" on the Reviewing toolbar but an "author" in Word's Track Changes preference pane.

Here are the chief ways in which markup has changed in Word 2004:

- Comments were previously viewed and edited in the Comments Pane, at the bottom of the document window. Now you can also view and edit them in balloons, which appear to the right of the text in Page Layout view (**Figure 29**, next page). Comments now receive a date-time stamp.

FIGURE 29
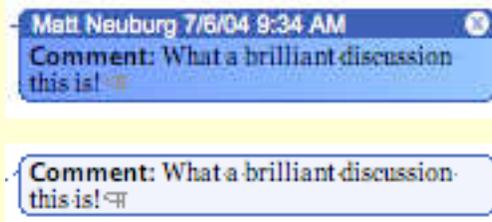
A comment balloon, shown with and without its heading. (I discuss Balloon headings later.)

- Text that was commented on was previously indicated by high-lighting, whereas now it's noted by small bracket-like marks. (See **Figure 30**.) The comment marks are a bit hard to see, but, unlike the highlighting used by previous versions of Word, they don't interfere with your ability to see text selections. Comment numbers are gone. Viewing a comment as a tooltip, by hovering the pointer over the text commented on, no longer works reliably.

FIGURE 30
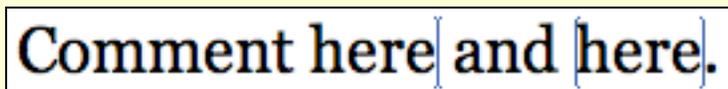
Commented text, with comment marks indicating the existence of comments. There is a comment at the insertion point after the first "here" and another comment embracing the whole of the second "here".

- Revisions were previously noted in the text by revision marks. Now they're also noted in the Reviewing Pane, which is the new name for the Comments Pane, and they can be viewed in balloons, which (like comment balloons) appear to the right of the text in Page Layout view. Changes to formatting are now properly noted and described (instead of the earlier meaningless description as a "property change").

- The Reviewing toolbar has been completely reworked, to become the primary control center for working with markup. The Next button now finds both comments and revisions; the Reject Change button can also delete a comment. The markup displayed in the document can be filtered by type (for example, to display only comments or only revisions) and by reviewer. (The Reviewing Pane cannot be filtered, as the former Comments Pane could be.) The document and its revisions can be displayed in four different markup modes.

Read this section to learn more about the author, the Take Control series, and the publisher. For help with reading or printing this ebook, see Read Me First.

About the Author

Matt Neuburg is a former Classics professor. One of his students, to whom he tried to teach the fine art of composing Greek sentences, was Adam Engst, who later went on to publish *TidBITS*. Matt eventually left academe and became a *TidBITS* Contributing Editor, writing reviews of software such as outliners and databases.

He is also a consultant and programmer, and has written three books for O'Reilly & Associates: *Frontier: The Definitive Guide, REALbasic: The Definitive Guide,* and *AppleScript: The Definitive Guide.* He lives in the village of Ojai, California, which he regards as all but indistinguishable from Paradise.

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Editor Caroline Rose has dedicated many hours to this book. Her numerous perceptive suggestions have smoothed its structure, clarified its exposition, honed its style, and eliminated several major errors. To her, my special thanks.

Shameless Plug

If references in this book to AppleScript have piqued your curiosity, you might like to learn more about it.

AppleScript is a system-level language that can make applications do things programmatically. Instead of your doing something with the mouse, then reading the screen, then thinking about what this means and what you should do next, and so forth, the computer does the
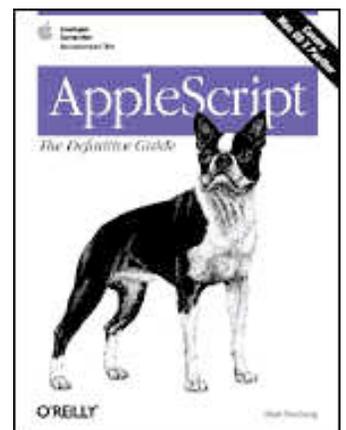
doing, the reading, and the thinking. This means that your hands, eyes, and brain are freed from having to perform repetitive or tiresome activities better suited to the computer itself. Lengthy operations can be reduced to a single step, and applications can be made to work together. AppleScript is a powerful way to automate Word 2004 and to combine its capabilities with those of other scriptable applications.

TidBITS Electronic Publishing will probably publish one or more Take Control ebooks about AppleScript in the future, but for the full story you might wish to obtain my book, *AppleScript: The Definitive Guide,* from O'Reilly & Associates.
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Adam and Tonya are well-known in the Macintosh world as writers, editors, and speakers, and they have written innumerable online and print publications. They are also parents to Tristan, who is 5 years old and thinks ebooks about trains, clipper ships, and dinosaurs would be cool.

> **TIP** To stay up to date on Macintosh topics, be sure to read *TidBITS* each week. At the *TidBITS* Web site you can subscribe to *TidBITS* for free, participate in TidBITS Talk discussions, or search 14 years of news, reviews, and editorial analysis (http://www.tidbits.com/).

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