Taming Microsoft Word®

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Abstract

The long, complex documents that medical writers often work with can place unusual demands on a word processing program. Microsoft Word® is a powerful program, but that does not mean using it properly is always easy or intuitive. Many problems that writers encounter are the result of not knowing exactly how Word works, what unintended effects its options may have, or the best practices for performing certain writing and editing tasks. This article explains some of Word's more troublesome quirks and shows you how to avoid them.

Keywords: Microsoft Word, Word processing

If you are a medical writer, there are pretty good chances that you use Microsoft Word® to create and edit your documents. For better or worse, it is the *de facto* standard in the pharmaceutical industry. It is a powerful and flexible program, to be sure, but as such it offers pitfalls and traps to the unwary user. Many of these potential problems are not bugs but are actually features of the program, features that may have their uses in certain circumstances, but which can also cause problems when the user is not aware of how they work. In this article, we explain some of these potentially problematic 'features' and tell you how to deal with them. We deal specifically with Word 2010, but the information is generally relevant to earlier versions of the program.

Keeping track of formatting

As you probably know, a style is a defined set of formatting rules that can quickly be applied to the text in your document and that can be easily modified. Styles are certainly an important and useful feature. However, some users find their list of styles becoming cluttered up with seemingly extraneous styles, styles that you do not remember being there when you started the document, and it can become difficult and time-consuming to locate and apply the styles you actually need. What gives

this unwanted proliferation of styles is what a medical person might call a *style malignancy.*

The culprit is a Word option named **Keep track of formatting**. When this option is turned on, Word keeps a watch on what you are doing and automatically defines a new style for formatting that you apply to the existing styles. Let us see how this works.

Suppose that your document's base style for text is called Body Text and it is defined as Arial font, 12 points. As you edit the document, you select a paragraph formatted as Body Text and make it boldface. Word notes your action and creates a new style called Body Text + Bold. Then, you change another section of the Body Text from 12 points to 10 points – a new style called Body Text + 10 pt is created. This goes on and on until your style list is a metre long. It is easy to prevent Word from creating new styles by turning off a particular program option as follows:

1. Display the **File** tab.
2. Click the **Options** command.
3. Choose the **Advanced** category.
4. Turn off (remove the check from) the **Keep track of formatting** option, as shown in Figure 1.

Easy enough – but what if you have inherited a document that is already loaded down with these unnecessary styles from a previous user? You could delete them all, but it would be easier just to hide the style names so they do not clutter up the style list.

1. If the style list is not already displayed on the right side of your screen, show it by clicking the diagonal down arrow at the lower right corner of the **Styles** group on the **Home** tab.
2. A dialogue box containing the style list will appear and at the bottom is the **Options** link. Select this link to open the dialogue box **Style Pane Options** (Figure 2).
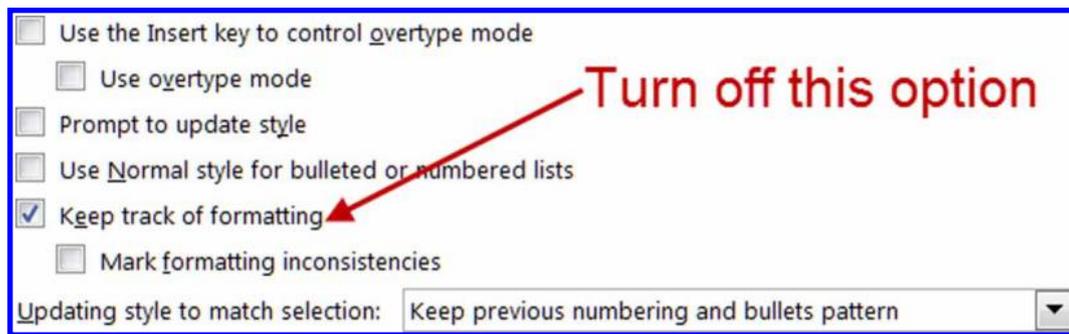
Figure 1: Telling Word not to create new styles based on the formatting changes.

3. Turn off the three options that are indicated in the figure and then close the dialogue box.

Now, your style list will not show the names of any styles that were created by the **Keep track of formatting** feature.

Prompt to update style

Have you ever had formatting in a document change, seemingly for no reason at all? You could think that there is a poltergeist in the computer! It is more likely, however, that the **Prompt to update style** option is turned on. This option tells Word to watch what you are doing and update the style definitions to match the manual formatting changes that you apply. For example, suppose your document has a style named Body Text that is defined as Times New Roman font, 12 points. If you select a single paragraph that is assigned this style and change the font size to 10 points, Word updates the style definition to match the previous command, with the result that all the current and future Body Text paragraphs will be formatted as a 10 point font. This is probably not what you want, and it can be
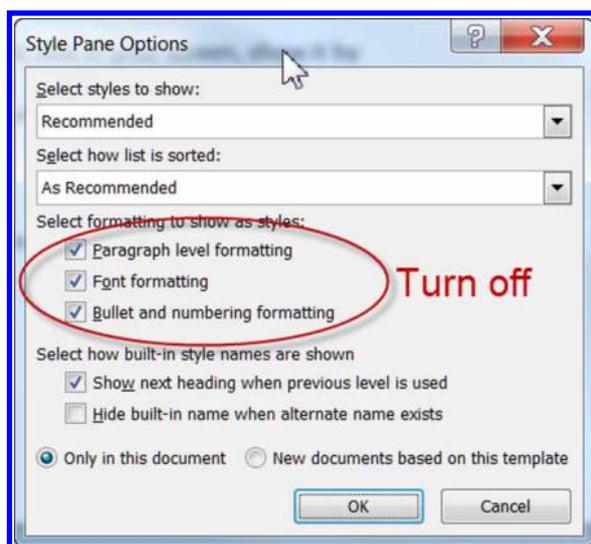

Figure 2: Hiding the names of unnecessary styles.

particularly problematic when you are working in a client's template and inadvertently change one of their carefully planned styles. We recommend that you turn this option off and leave it that way. It is located in the same dialogue box as the **Keep track of formatting** option (see Figure 1).

'Paste as Unformatted Text' – A writer's best friend

As medical writers, we are often required to copy text from a source document and paste it into our own document. Depending on where you are copying from, the copied text may be accompanied by its original formatting – that is, the formatting it had in the source document. Sometimes you may want this, but more often it creates problems because you want to apply formatting from the destination document to the copied text. In some cases, it can also bring one or more style definitions from the source document and these can conflict with your own document styles.

Here's where 'Paste as Unformatted Text' comes to the rescue. This command pastes just the text that you have copied, as if you had typed it in yourself, and ignores any and all formatting that may be attached to the text. By default, the formatting that is in effect where you paste the text is applied, but you can also format the text differently as desired. Here's how:

1. In the source document, copy the text to the clipboard.
2. Switch to the destination document and click the arrow at the bottom of the **Paste** command on the Home tab. This displays the **Paste Options** (Figure 3).
3. Click the button indicated in the figure to paste the clipboard contents without formatting.

There is a shortcoming with this technique, namely that non-standard text symbols such as $\leq$ and © are lost, as are non-breaking spaces and hyphens, and these will typically be replaced by small boxes in
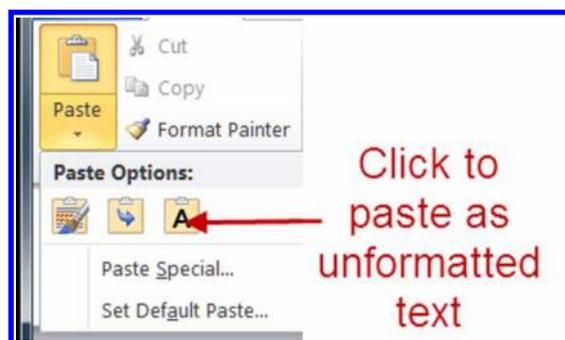
Figure 3:   Pasting text without formatting.

the pasted text, so you will have to put them back in manually.

My table of contents formatting keeps vanishing

Word has powerful tools for creating table of contents (TOCs) that automatically update to reflect the changes in the document. A common complaint, however, is that the formatting you have applied to a TOC will vanish without warning and you will have to start all over again. Frustrating! The fact is, however, that you should not be manually formatting your TOC. You will see why, once you understand how Word TOCs work.

A TOC is generated automatically by Word based on the headings in your document. The appearance of the TOC is controlled by styles, just like the other text. These special styles are named TOC 1 (controls the appearance of the top-level TOC items), TOC 2 (second-level items), and so on. These styles do not show up in the style list because they are used only with the TOCs, but they work just like other paragraph styles to control font, alignment, indentation, justification, etc.

Here's what happens when you manually format a TOC in your document. Subsequently, you will almost surely update the TOC to make sure it accurately reflects the document. The update means that Word deletes the old TOC and generates a new one by using the assigned TOC styles – and of course your manual formatting vanishes to be replaced by the TOC style formatting.

The bottomline, then, is that you must modify the TOC styles in order to change the TOC formatting. We would not go into the details of working with styles, but a TOC style is really not different from a regular paragraph style and you work with it the same way. It is a bit tricky to find these styles, however! Here are the required steps:

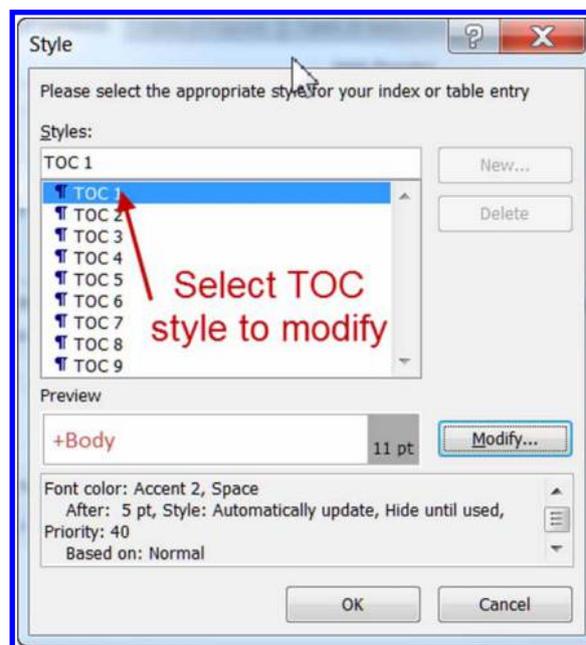1. Place the editing cursor anywhere in your active TOC.

Figure 4:   Selecting a TOC style to modify.

2. Click the **Table of Contents** command in the **Table of Contents** group on the **References** tab.
3. Near the bottom of the menu, click the **Insert Table of Contents** command.
4. In the next dialogue box, click the **Modify** button to display the **Style** dialogue box (Figure 4). You can see that the various TOC styles are listed here.
5. Click the TOC style that you want to change, then click the **Modify** button. This opens the **Modify Style** dialogue box where you can make the desired changes to the selected style.
6. Repeat step 5 as needed to change the other TOC styles.
7. Close all the dialogue boxes. When Word updates your TOC you will see the formatting changes applied.

Now that you know how TOC formatting works you would not waste any more time trying to do it manually.

A few dos and don'ts

We are going to wrap up this article with a short list of things you should not do in Word and the proper way to get the same result. Some of these are pretty basic but they can make a big difference in the ease of working with Word documents.

If you want some white space between paragraphs, **don't** press the 'Enter' key twice. This adds an extra, blank paragraph that can cause problems later. **Do** define the paragraph's style

to include some space before and/or after each paragraph.

Don't press 'Enter' repeatedly to move an item to the top of the next page. This may look fine initially, but things will shift as text is added to and deleted from the document. **Do** insert a hard page break by pressing the 'Ctrl' and 'Enter' keys simultaneously before the item or use the **Keep with next** option by accessing the dialogue box in the **Paragraph** group on the **Home** tab or the **Insert** tab.

Don't press the spacebar repeatedly to move a word to the next line. **Do** press 'Shift' and 'Enter' to start a new line without starting a new paragraph.

In summary

As medical writers, our job is to use our writing and scientific expertise to create high-quality documents. We should not be wasting our time fighting with the word processor! The information in this article should help you get a handle on Microsoft Word.

Author information

Peter Aitken, PhD served on the faculty at Duke University Medical Center, Departments of Cell Biology and Surgery for 18 years participating in clinical and pre-clinical research and teaching medical and graduate students. Since leaving academia 12 years ago he has specialised in writing regulatory and educational documents for the pharmaceutical industry.

Maxine Okazaki, PhD received her degree in pharmacology and was a research scientist and faculty member in the Department of Pharmacology and Cancer Biology at Duke University Medical Center from 1984 to 2001. Since leaving Duke she has worked for several pharmaceutical companies and contract research organisations and is currently an independent consultant.

Both the authors are principals at Piedmont Medical Writers LLC, a small firm providing writing and consulting services to the pharmaceutical industry. They also authored the book *Microsoft Word 2010 for Medical and Technical Writers* (see http://www.tech-word.com and a review of the book in this edition of MEW, page 67).