Tips and Tricks for Using Microsoft Word Styles

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Who I am

Senior Technical Writer, Tableau Software

Many years with Microsoft Word, yet …

Learn something new *every single week*

Please feel free to contact me!

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Preliminaries

Today's presentation

Have 70+ tips—just a selection today!

Demo-focused

Word 2013

Questions as we go

▶ Stop me if something is not clear

Presentation and *all* tips here:

http://www.mikepope.com/ACES2016

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Goals

Cover style basics

Provide some basic and some advanced tips

Induce you to always use styles

Try not to confuse you ☺

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Styles overview

Why styles?

Reusable formatting

Consistency within & across documents

Easy & accurate global changes

Integration with TOCs and other document-level features

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Style types

Paragraph: Indentation, spacing, alignment, border; also font, color

Character: font, color

Linked: Hybrid of paragraph and character style

List: bullet/number character, list item indentation

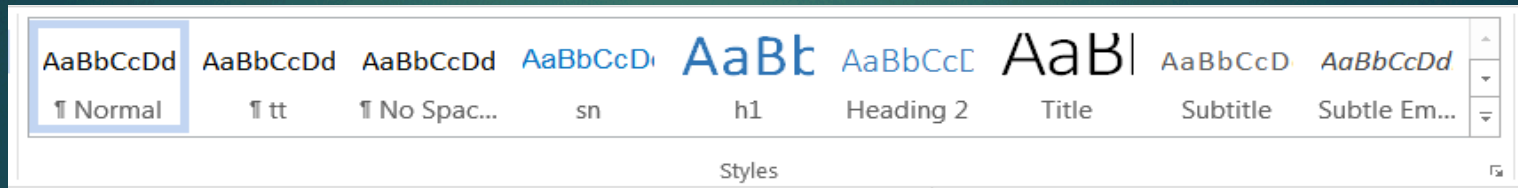**Table**: color, shading, font for headers, rows, columns

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Overview

Demo

Demo-ApplyStyles.docx

Tips for applying styles

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Quick Style gallery

Easily accessible

Preview-y

Live preview (hover)
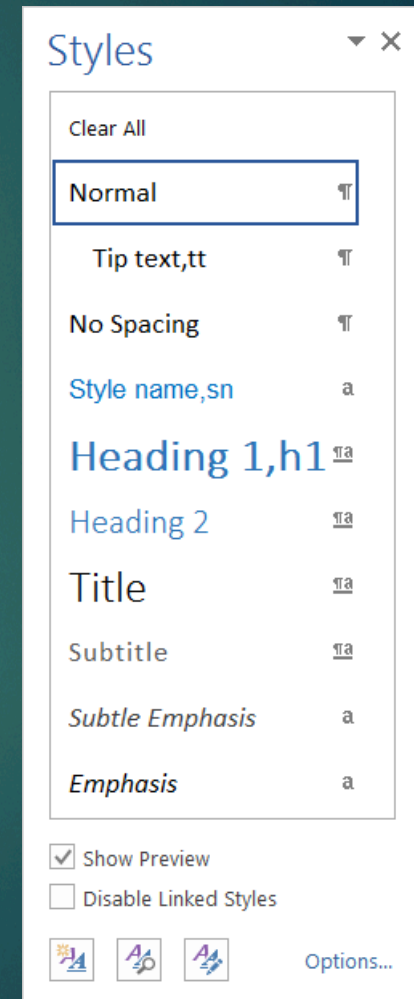
Contents customizable

Demo-ApplyStyles.docx

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Styles pane

Toggle with Ctrl+Alt+Shift+S

Preview-y

Choose what to display

Entry point for styles management

Demo-ApplyStyles.docx

Styles
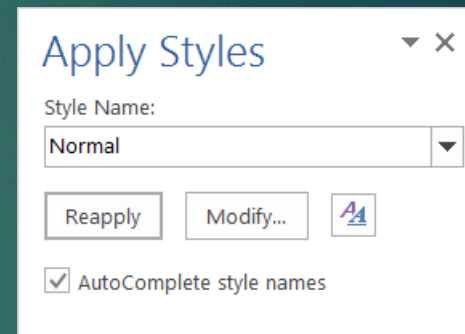
Clear All

Normal ¶

Tip text,tt ¶

No Spacing ¶

Style name,sn a

Heading 1,h1 ¶a

Heading 2 ¶a

Title ¶a

Subtitle ¶a

Subtle Emphasis a

Emphasis a

☑ Show Preview

☐ Disable Linked Styles

Options...

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Apply Styles dialog

Open with Ctrl+Shift+S

Keyboard friendly

▶ Supports aliases

Provides access to *all* styles

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More options

Keyboard shortcuts (built-in and custom)

Copying paragraph marks

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Demo-ApplyStyles.docx

General tips

Don't choose a style based on appearance

Don't mix styles and direct formatting

Do map common keystrokes (Ctrl+B) to styles

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Tips for creating styles

Demo

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Set "inheritance"

Style based on setting

Useful when formatting should be in sync (headings)

Inherits all formatting from "parent"

Changes in the parent cascade (except overridden settings)

Demo-CreateStyles.docx

More options

Unselect **Automatically update** option

Create a style alias

Create a keyboard shortcut

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Demo-CreateStyles.docx

General tips

Plan the styles you need

Create a style for *every* formatting need

Use semantic (functional) names

- ▶ Good: **Alert paragraph, Blockquote, Placeholder text, Scientific name, Image in list**

- ▶ Not as good: **Wide paragraph, Green text, Italics, Indented image**

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Tips for using styles with lists

List styles

Automatic lists

All "automatic" lists use **List Paragraph** style

You *can* set:

▶ Font; color; line spacing; alignment; borders

You *cannot* set:

▶ Bullet/number style; indentation; different formats for different levels

Demo-Lists-Auto.docx

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Built-in list paragraph styles

Word includes styles **List Bullet** *n*, **List Number** *n*, **List Continue**

▶ Paragraph styles with bullet/number formatting, indentation

Each level is independent, based on **Normal**

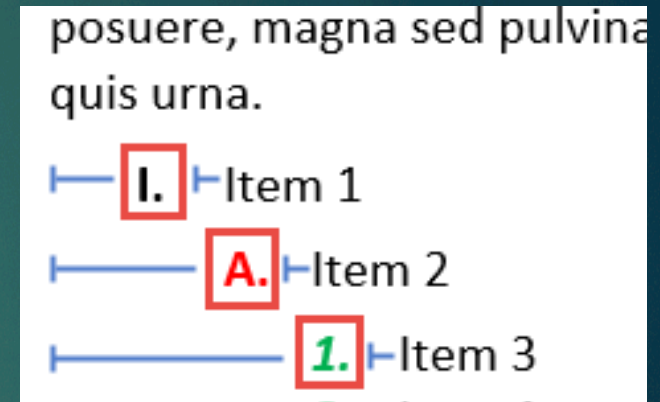**Style for following** is set to same

Get *some* automatic behavior (renumbering)

No tab behavior for indentation levels

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Demo-Lists-Auto.docx

Multi-level list styles

List styles set the following:

▶ Bullet/number character (each level)

▶ Bullet/number font (weight, color)

▶ Indentation (each level)

▶ Space between bullet/number and text

Does not set font or paragraph formatting of list item *text*. Instead, …

Link to a paragraph style for each level.

Demo-Lists-ListStyle.docx

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Tips for working with templates

About templates

Templates store:

▶ Styles, macros, keyboard shortcuts, auto-text, page layout, and default text

By default, Word uses Normal.dotm

If Normal.dotm is deleted or corrupted, Word creates a fresh copy

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Custom templates

Create a custom template "by example"

Use a custom template

Change the location for custom templates

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Locking templates

Prevent users from using direct formatting

Prevent users from modifying or adding styles

(You can also lock an individual document)

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Demo-ApplyStyles.docx
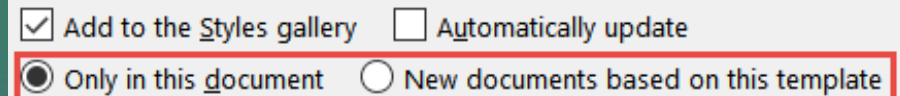
Tips for modifying styles

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Modifying styles

Modify manually

Modify a style "by example"

Specify the scope for the change:

▶ This document

▶ All new documents

☑ Add to the Styles gallery	☐ Automatically update
◉ Only in this document	◯ New documents based on this template

Demo-ApplyStyles.docx

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Tips for using styles for document-level features

Tables of contents (TOCs)

Create TOC from styled text

▶ Default: based on outline level (e.g. headings)

▶ Can base on arbitrary styles

Change appearance of TOC itself using styles (font, color, tab leaders, etc.)—**TOC 1**, **TOC 2**, etc.

Demo-TOC.docx

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Tips for debugging styles

Debugging

Debugging tools

View direct formatting in the **Styles** pane

Style Inspector pane

Demo-ExamineStyles.docx

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Fun & useful tips

Fun & useful

Miscellaneous tips

Use styles in Outlook (desktop client)

Find text that's been styled

Change the style for comments

Skip spell check for certain styled text

Use the **Manage Styles** dialog for many other features

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Demo-NoSpellcheck.docx

Wrapup

Q&A

Questions?

Catch me at the conference

Email me: **mike.pope@gmail.com**

Download all the materials:
www.mikepope.com/ACES2016