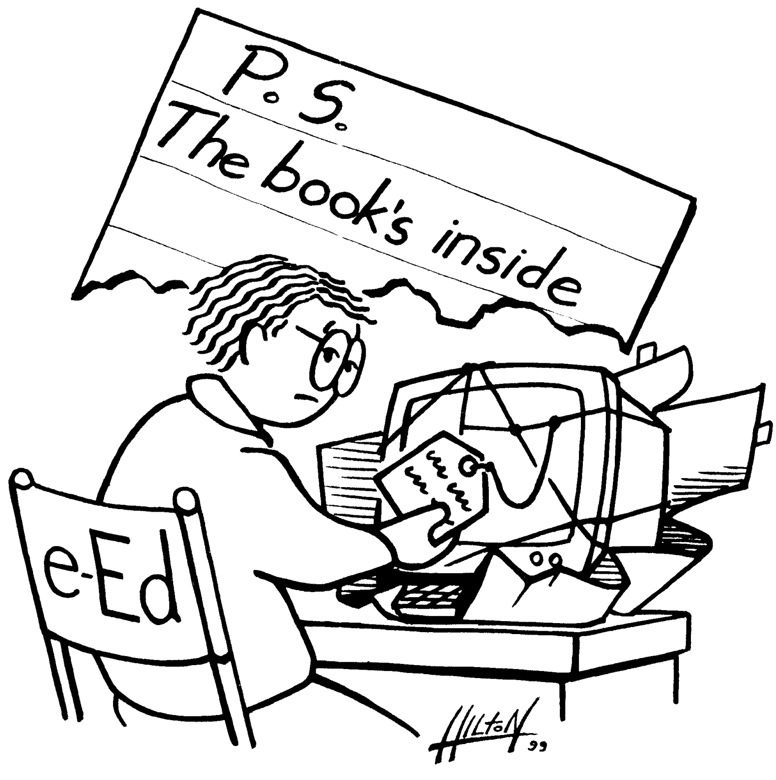
Electronic Editing

editing in the computer age

Jean Hollis Weber



Electronic Editing
Editing in the computer age

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About this book

Some editors are still marking changes on paper, with someone else typing the editor's markup into the file. Managers, writers and editors are discovering, however, that having the editor type changes and questions directly into the file can be a lot more efficient—particularly when the writer and editor don't work in the same office.

This book is intended for students, writers and editors who are making the transition to working electronically, and for their managers and clients, as well as more experienced people who have to learn the essentials of a new word-processing or publishing program in a few hours. You might be an employee editor or an independent. You might work in the same office as the writer and other members of the publishing group, or you might work in a different office in the same metropolitan area, or you might be located anywhere in the world, receiving and sending manuscripts over the Internet.

By providing some specific tool-use information, this book supplements other texts on editorial topics such as grammar, style and organization. Readers are encouraged to use the other texts for more information on those topics.

Although the examples in this book use Windows 95/98 software, the programs discussed (except for Lotus Word Pro) are also available for Apple Macintosh computers, with minor differences in the available features.

Chapter 1 briefly summarizes the electronic editor's role, how editors fit into the document production cycle, and related management issues. You might find this chapter useful when clarifying exactly what managers, writers, or other clients expect from you when you edit their documents.

Chapter 2 summarizes the basic things an electronic editor needs to know when working with a client and when editing a file.

Chapters 3 through 7 provide specific instructions and tips for editing materials electronically for print publication, using Microsoft Word, Lotus WordPro, Adobe FrameMaker and Adobe Acrobat.

Appendix A gives an overview of backing up data and programs.

Appendix B includes some hints for an editor needing to collect e-mail when away from the home or office.

Appendix C lists the books, articles, and Web sites mentioned in this book, plus others that supplement the material included.

Appendix D is a glossary of publishing and computing terms used in this book.

— Jean Hollis Weber
Airlie Beach, September 1999

Dedication

To Eric Lindsay, for putting up with me during the research and writing of this book, assisting with technical problems, providing food and drink at appropriate intervals, and just being there as a life partner.

Acknowledgements

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About the author

Jean Hollis Weber has a Master of Science degree in botany and 24 years of experience as a scientific and technical editor and writer in the fields of biology, mathematics, engineering, and computing. She has taught short courses in writing and editing and lectured to graduate and undergraduate level classes in writing and editing at several universities. Jean is active in the Australian Society for Technical Communication (NSW) Inc and the Society for Technical Communication (USA).

A dual US–Australian citizen, Jean has lived in Australia since 1974. Recently she escaped from the big cities to live in a seaside resort town at the gateway to the beautiful Whitsunday Islands, from where she conducts her editing business over the internet. Jean maintains the Technical Editors' Eyrie Web site (http://www.wrevenge.com.au) and publishes a fortnightly newsletter for editors.

Contents

Chapter 1
Defining the electronic editor's role

edit, transitive verb. 1 a: to prepare for publication or public presentation; b: to assemble (as a moving picture or tape recording) by cutting and rearranging; c: to alter, adapt, or refine, especially to bring about conformity to a standard or to suit a particular purpose; 2: to direct the publication of; 3: delete, usually used with out.

editor, noun. 1: someone who edits, especially as an occupation; 2: a device used in editing motion-picture film or magnetic tape; 3: a computer program that permits the user to create or modify data (as text or graphics) especially on a display screen.

— from Merriam Webster's online WWWebster Dictionary, http://www.m-w.com/cgi-bin/dictionary

The editor's role covers two main functions:

- Analytical and decision-making
- Clerical (typing in the changes)

With on-paper editing, these two functions are often done by different people. Electronic editing combines the two functions.

Electronic editors are people who make changes directly into computer documents (files), or use computer programs to insert comments into electronic files, instead of (or in addition to) marking printouts on paper.

This chapter covers the following topics:

- What do electronic editors edit?
- What work does the electronic editor's role include?
- What are the benefits and problems of electronic editing?
- How do you divide editing into identifiable tasks?
- Why should you use standards and guidelines?
- How does the editor fit into the organization?
- How do you organize the flow of writing and editing work?
- How long does editing take?
- How many writers can one editor support?
- How do managers work with editors located off-site?
- How do you specify the editor's role and responsibilities for a job?
- Finding more information

What do electronic editors edit?

Electronic editors work in a variety of fields, including:

- Commercial publishing
- Computer software and hardware
- Engineering, sciences, and medicine
- Legal, banking and brokerage services
- Advertising
- Web site development for any business or activity
- Any business or activity that produces written materials, in any form, for internal or external use
- Voluntary or non-profit organizations

Many people who edit are not called editors; they have other job titles and roles, for example personal assistant, analyst, researcher, engineer, consultant, manager, and so on. Some editors are employees; others are independents.

Examples of material edited

Editing today covers far more than just printed materials. Electronic editors may be required to deal with materials to be provided in printed or electronic form, or both.

Materials edited include internal company documents, documents that have a limited audience, and documents to be delivered and used electronically.

Examples of printed materials that may also be electronic:

- Reports, including research reports, annual reports, progress reports
- Proposals, including grant applications, project proposals
- Conference proceedings
- Books, including encyclopedias and textbooks
- Journal articles
- Presentation materials (for talks at meetings) and displays
- User guides, training materials, policy and procedures manuals
- Newsletters
- Press releases, marketing materials

Examples of electronic materials:

- Video scripts
- On-line help, computer-based training (CBT), electronic performance support systems (EPSS)
- Web pages, either publicly-accessible through the World Wide Web or on a company intranet
- Multimedia such as CD-ROM or information kiosks

What work does the electronic editor's role include?

The commercial publishing industry has well-defined editorial roles, but many editors work in other businesses (see "What do electronic editors edit?" on page 2).

Most people may have an idea what editors do, but their idea is usually a subset of what editors actually do. And most people know even less about what electronic editors do.

Because of the diversity of ideas and definitions about the editor's role, I always recommend that editors clarify exactly what the client expects them to do.

For example, what does the client mean by copy edit? It may be rather different from what you mean. You may think the term includes a lot more revising of language use than the client intends—if you don't specify the scope before you do the work, you may be accused of making arbitrary changes and interfering with the writer's creativity. On the other hand, the client may ask you to copy edit, but really wants you to rearrange the book; when you don't, the client thinks you are incompetent.

You may find the following sections useful as a starting point when clarifying your role. Change the lists as appropriate to your situation.

Depending on the size of the group (whether a publishing group or any other group of people working on a project), the amount of work, and the skills of the editor and other team members, the editorial work outlined in this chapter could be spread over more than one individual. In many cases, it is preferable that more than one editor be involved.

Editors do all of these things:

- Get involved in a writing project from the planning stage through to completion
- Plan the documents necessary for a project: content, cost, timing, other resource requirements
- Coordinate the production of several books on one product (often written by different people)
- Set and enforce standards for the company's publications and (in consultation with writers) for a particular project
- Determine the suitability of material for the target audience:
  - Organization
  - Presentation
  - Word use
  - Illustrations
  - Comprehensibility
  - Completeness and correctness
  - Retrievability (index, table of contents),
  - Tone
  - Coherence
  - Non-sexist style
  - Adherence to accessibility guidelines (Web materials)
- Assist writers in the development of material, particularly its logical order and structure

- Advise writers on the appropriate use of graphics, wording of headings, figure and table captions, page breaks, index and glossary entries
- Perform whatever levels of edit are necessary (see “Types and levels of edit“ on page 6)
- Review, edit and rewrite all copy as necessary, in cooperation with writers
- Supervise graphic artists and editorial assistants (a term that covers a range of duties, usually clerical)
- Fix problems in files, as described in Chapters 3 through 7 of this book
- Produce final camera-ready copy (or the electronic equivalent), liaise with printers, examine and approve page proofs, resolve associated problems

In addition, editors may be required to:

- Provide additional or missing material
- Edit copy written by a person unskilled in English
- Edit transcribed tapes
- Edit for technical content
- Assist with translations, usually in the idiomatic expression in English of technical concepts
- Organize reviews of material for technical accuracy
- Test written procedures against the product (software or hardware)
- Help people prepare speeches, select visual aids, and rehearse presentations
- Maintain a reference library on writing and other communications
- Collect samples of previous publications to provide material for decision-making
- Design and present in-house writing courses

In the case of technical material such as computer documentation, often the audience for the material is not composed of other technical people, and the editor is not the person responsible for ensuring the technical accuracy of the material.

In some cases, the editor is partly responsible for technical accuracy. For example, when editing a user’s guide for a computer software program, the editor may test the written procedures using the software.

What are the benefits and problems of electronic editing?

The benefits of electronic editing are mostly in saving time and money for a company. The problems generally have more to do with conflicts between the writer and the editor, rather than any technical issues.

Electronic editing is a new way of working for most people, even those who use a computer for writing and other work. Most people take a while to become familiar with new ways of working, and many resist the changes.

If electronic editing is being imposed on an existing writer or group, management needs to (but all too often doesn’t) treat the situation with tact and consideration. New hires (staff or contract) can reasonably be required to work the new way without any negotiation, but hiring managers should ensure that candidates are aware of the working arrangements, whatever they are. Remember that the word “teamwork“ means different things to different people—to some it means sharing ownership or responsibility for a document, but to others it means each person contributing expertise but one is the owner or responsible person.

Benefits

Electronic editing can have many benefits to a company, including:

- **Saves time over a project.** Writers do not need to spend time deciphering editors' handwriting and typing minor copy-editing corrections; this is effectively doing the work twice. If the editor types the corrections directly into the file, the writer can quickly check that no errors have been introduced. The time the writer spends on a document is reduced. Some editors may take a bit longer to type in corrections instead of handwriting them, but I can type much faster than I can write, and I know how to use the computer to do some of the work for me.
- **Saves storage space while maintaining archives of changes.** Drafts and changes can be archived electronically, rather than on paper. The same essential information is preserved: who made the changes and when. Physical storage space is expensive; electronic storage is relatively cheap.
- **Supports workgroups not all in one location.** If you work with subcontractors or staff in other locations (as is quite common), no longer do you have to send piles of paper by courier (thus saving time and money), with the potential of losing the only copy containing your hand-written comments.
- **Increases and diversifies editors' skills.** By learning more about publishing software and working directly with files, editors can:
    - Assist inexperienced writers
    - Troubleshoot problems with files
    - Be better placed to coordinate and manage publication projects
    - Provide consulting services covering a wide range of writing, editing and publishing requirements
    - Spot problems in online versions of documents (for example, those to be published on a Web site) that would not be apparent on paper

Problems

Electronic editing isn't all positive, of course. Some common problems include:

- **Difficulty seeing things on screen.** Some punctuation marks are difficult to see, WYSIWYG (what you see is what you get) displays sometimes aren't entirely accurate, and most editors find consistency comparisons more difficult when they can't simply flip pages. So editors often print documents, scribble on them, and then type changes into the file. This process may take the editor longer than simply doing the scribbling, but it saves the writer time. I find that when I work with printouts, my scribbles are more cryptic (and thus faster to do) than when I know someone else will have to interpret them.
- **Difficulty getting used to a new way of working.** Editors unused to electronic editing may take some time to learn the necessary skills and become proficient in the techniques. This initial increase in time spent should, however, be recovered later through increased efficiency.

  Many writers are used to receiving editors' comments hand-written on printouts of their work. Some writers may be uncomfortable with someone making changes to their files, even if the original files are not touched. (Other writers are used to seeing only the typeset version of their manuscript after editorial changes are complete, so they probably won't notice any change in the way editors work.)
- **Difficulty comparing multiple reviews.** If several people (technical experts, for example, in addition to an editor) electronically review or edit copies of a file, the writer may have difficulty comparing all the comments on

screen; this job is usually done more easily by spreading out a collection of papers on a desk.

- **Lack of easy change-tracking features in some programs.** Adobe FrameMaker, for example, doesn't elegantly handle change tracking. You can do it (as described in Chapter 6, "Editing using Adobe FrameMaker") but some techniques are cumbersome and time-consuming for all concerned. If your publication process requires detailed tracking of changes, you may need to develop different ways of working.
- **Ergonomic considerations.** Editors spending more time working on a computer must be aware of the associated risks of back, eye, arm and wrist problems. They need to ensure that desks, chairs, lighting, and other workplace features are appropriate; take frequent breaks and exercise; and observe all the other precautions that other groups of computer users do.
- **Difficulties adjusting to working with editors located off-site.** Having some people working off-site provides much opportunity for misunderstanding and resentment from co-workers and managers. See "How do managers work with editors located off-site?" on page 17 for more discussion of this problem.

How do you divide editing into identifiable tasks?

By dividing the editing job into several tasks, you can help clients clarify what they expect from an edit and what you can reasonably do in the time available. This helps you and your clients or management make several decisions:

- How many levels of edit are required for each document
- How many levels of edit can be done, given time and money constraints on a project
- Who can or should edit at each of the levels identified

Here are some of the ways that editorial tasks are defined or classified:

- Types and levels of edit
- Rule-based and analysis-based edits

Types and levels of edit

An excellent paper by Robert van Buren and Mary Ann Buehler (1980) divides editing into nine types of edit, which are then grouped into five levels of edit, as shown in Table 1. (A level 1 edit includes all 9 types; a level 2 edit drops the substantive edit, and so on.)

Table 1. Types and levels of edit

	Level of edit				
Type of edit	**1**	**2**	**3**	**4**	**5**
Coordination	x	x	x	x	x
Policy	x	x	x	x	x
Integrity	x	x	x	x	
Screening	x	x	x	x	
Copy clarification	x	x	x		
Format	x	x			
Mechanical style	x	x			
Language	x	x			
Substantive	x				

A **coordination edit** is concerned with manuscript handling, planning and estimating, job monitoring and control, dealing with printers, webmasters, and so on.

A **policy edit** ensures that the document conforms to the policy of the company, in presentation, content, legal requirements, and so on.

An **integrity edit** ensures that the document is internally consistent. For example, are references to figures, tables, sections, part numbers, product numbers, and other documents correct, and do the referenced items exist? For online materials, do the hyperlinks work?

Screening and **copy clarification edits** examine many of the topics I've seen referred to elsewhere as copy editing. For example:

- Spelling, grammar and punctuation are correct
- Incomprehensible statements (for example, resulting from missing material) are identified and clarified
- Illustrations are correctly inserted
- Mathematical equations are typeset correctly

A **format edit** determines that the document conforms to the organization's standards on typography, layout and illustrations.

A **mechanical style edit** examines whether the document meets the organization's standards on such matters as capitalization, spelling, hyphenation of compound words, use of symbols, bibliographic references, use of italics or bold type, and so on.

A **language edit** is concerned with how ideas are expressed, regardless of the format or mechanical style. The language edit is one of the most important types of edit from the point of view of the reader of the document, and the area in which much business and technical writing needs the most work. For example:

- Sentence complexity and use of active or passive verbs
- Conciseness
- Clear, logical development of ideas
- Use of jargon or technical terms appropriate for the intended audience

The **substantive edit** deals with the overall structure of the publication:

- Does it all fit together into a coherent whole?
- Is the order of presentation logical (from the target audience's point of view)?
- Is all the necessary information included, and unnecessary information deleted?
- For online help, is the help helpful? Does the content answer the target audience's questions?
- Are the retrieval aids (particularly the index) useful? Does the index contain terms that are useful to the target audience? Are irrelevant index entries deleted? (Irrelevant entries typically arise from automated indexing systems, particularly noticeable in online help systems.)
- For online materials, are the navigation aids logical and useful in context? Can users easily find the links they want?

Some of these types of edit can be (indeed, often should be) performed by different people, or they could all be done by one person.

In practice, most organizations tend to divide editing into three types:

- Substantive edit
- Copy edit, which typically includes screening, copy clarification and language edits
- Production edit (sometimes called a quality edit), which includes policy, integrity, format and mechanical style edits

Rule-based and analysis-based edits

Classifying editing tasks into "rule-based" and "analysis-based" edits provides a basis for determining which editorial decisions are negotiable with the writer and which are non-negotiable.

Rule-based editing covers ways to make a document correct, consistent, accurate and complete, using standards and guidelines. Rule-based editing is usually non-negotiable with the writer: the editor enforces the rules, as specified by the company. Most of the topics covered by the first seven types of edit are rule-based. Some examples:

- Spelling, grammar, punctuation, capitalization, hyphenation
- Adherence to legal requirements (copyright, trademarks, and so on)
- Internal consistency, typically to do with design: typography, layout and illustrations
- Bibliographic references and citations

But rule-based editing is not enough: the document can still be inappropriate for the intended audience.

Analysis-based editing covers the process of evaluating a document for concept, content, organization, form and style, to make it more functional and appropriate for its readers. Much of this type of editing should be negotiable: the editor should suggest improvements rather than make corrections.

Problems arise when the difference between "enforcing the rules" and "making suggestions" is not clear.

Why should you use standards and guidelines?

Standards are usually non-negotiable and enforced by the editor, while guidelines may be either rules (non-negotiable) or suggestions and examples (negotiable between the writer and the editor). However, usually rules and suggestions are mixed up in the same document (often called a "guide" or "guideline"), and it's not always easy to determine what is negotiable and what is not.

Which items should be rules and which should be suggestions is a matter of opinion and corporate policy.

Here are some reasons to use standards and guidelines:

- Quality control
- Ensure documents conform to corporate image and policy, including legal requirements
- Inform new writers and editors of how things are done in the organization
- Define what's negotiable and what isn't
- Improve consistency within and among documents, especially when more than one writer is involved
- Remove the necessity to "reinvent the wheel" for every new project

Publication guidelines (usually called a "style guide") often contain three types of information:

- Process (how we do things in this company or this department)
- Design (what our documents should look like)
- Style (contents)

I don't think process information belongs in a style guide, but it often ends up there, probably because someone needed this information written down, and no one knew—or could agree on—where else to put it.

Whether design information belongs in a style guide depends on several factors, which I'll mention later.

Process guides

Process guides include such information as:

- Who is responsible for what and when (writer, editor, reviewer, manager, subject matter expert, graphic artist, and anyone else who might be involved). For example, who approves a project and its budget; who needs to sign off on a project; how many reviews are required and at what stage of a document's development; who reviews a document and for what; and so on.
- What's the timeline? (For example, at what stage of development are reviews held?)
- What procedures are to be followed to initiate a project, call a review, etc? What milestones does the client want monitored and reported? Which tools are to be used for specific purposes? Who has authority to make the final call when writer/editor/subject-matter expert do not agree on a change?
- Where are documents stored (for example, in a directory on the LAN)? What file naming conventions, document numbering (equivalent to ISBN), document version numbering, check-out and check-in procedures, and so on are used?
- What type of information is to be included in a particular document? For example, what goes in a user's guide or a reference manual or online help?
- How to use tools; for example, what file formats and resolutions to use for graphics.

Design guides

While I think "design" is separate from "style," I appreciate that both types of information might be best presented in one document. For example, when outsourcing a writing project, you might want to specify quite clearly the "look and feel" of the documents as well as their content, either before letting the contract or sometime during the planning stage. (This could be initiated by the contractors, who would want agreement from you for the expenditure to be involved in producing the docs, or it could be initiated by the company for which the docs are being written, if they know exactly what they want.) It's not really any different with in-house projects.

Some of the factors determining whether design information should be included in a style guide, and what sort of design information is needed, include:

- What publishing medium are we using—paper? web? online help? other? all of the above?
- Do we need to adhere to a corporate style?
- Who is responsible for design and layout—the writer? an in-house designer? someone else?

With the increasing use of markup languages (SGML, for example; or even HTML with style sheets), the presentation of information is again becoming separate from the creation and maintenance of the content of that information. Information content is increasingly being stored in databases for reuse in a variety of situations and media. (Markup languages are nothing new—they were here long before desktop publishing and WYSIWYG.)

Design decisions may be made at a corporate level, with writers and editors required to follow those design decisions (for example, font size and face; offset, two-column or other presentation; use of horizontal rules); or writers' and editors' work may be "typeset" by some other part of the company. This way of working is typical of the publishing industry, but unfamiliar to many people who work in other industries.

So someone, somewhere, should have a design guide that covers the work you're doing. What level of detail you need to pay any direct attention to is another matter. If you are responsible for the final layout of the document you are working on, then you need to be familiar with (and follow) the design guide in detail. If you are not responsible for the layout, you may not need to know much about the design—except as it may constrain the way you are writing or the illustrations you may be producing (or asking the graphics people to produce for you). A style guide is an appropriate place to put design information that crosses disciplines.

Here are some items that might be design or might be style:

- Headers and footers: what goes in them and what pages do they appear on?
- Chapter and section numbering conventions

Style guides

What does belong in a style guide? The answers to questions such as these:

- What version of English to use (Australian? American?), specifying any variations. For example, in Australia, when writing computer software documentation for the local market, it's common to use Australian English but spell computer-specific terms (such as program or disk) in the industry standard way rather than the generic way (programme, disc).
- What system of measurement to use (metric? American?), specifying any variations (those pesky "dots per inch" etc) and whether conversions should be included in parentheses.
- What if any reference materials (such as an industry style guide or a particular dictionary) to use, specifying any variations.
- What style of capitalization to use for headings, vertical lists, figure and table captions, and other situations.
- What style of punctuation to use for running lists and vertical lists.
- What document elements (for example, title page, preface, table of contents, index, summary of changes, copyright information) are required, and what goes in them.
- What minimum level of information to include in a particular type of document (for example, conceptual information, procedural information)? Where appropriate (for example, corporate policy and procedures), include content templates.
- What style to use for cross-references within the document and to other documents.

- Illustrations and tables: do they always need captions? If not, under what circumstances do they need captions or not? Should they always be referenced in the text? If not, under what circumstances?
- When to use various types of highlighting (for example, bold or italics type).
- Numbers—when to spell out, when to use numerals; the use of commas or spaces in numbers over 999.
- Word use (for example, company-specific or product-specific terms; acronyms and abbreviations, and words to be avoided).
- Caution, danger and warning notices: wording and usage.
- Index style: how many levels? page numbers (for books) on main entries if they have sub-entries, or not? Page ranges—when to use. General guidelines on deciding what goes into an index.
- Glossaries and bibliographies; footnotes—what style, and when to use.
- Revision bars: what style, and when to use.
- How to indicate and acknowledge trademarks.

Too many style guides get turned into tutorials on grammar, spelling and punctuation. When the style guide is used by people who are not professional writers, this emphasis is understandable. It's always a matter of tradeoffs between brevity (including only what's needed for consistency) and completeness (when you know that the audience does not know the basics). I generally try to solve this problem by having a separate section for the writing tutorial, if one is needed. Separate documents might be better, on the theory that a small guide is more likely to be read. Many companies adopt a commercially-available style guide, and only note any additions or changes in the company style guide.

Style sheets

Style sheets supplement the style manual (if there is one). You might also use one to summarize vital information for your own reference or to give to an editor.

Record on a style sheet any decisions made for a particular product or publication, especially those not covered by the style manual or if the issue is a negotiable one. For example:

- Acceptable jargon, or the spelling, capitalization and hyphenation of names and terms
- Abbreviations used, including in measurements
- Special requirements for this audience (for example, language or knowledge levels); for example:
  - Whether the singular "they" is acceptable
  - Any terms to be avoided, such as non-English abbreviations or words, or terms that your audience might find confusing or unacceptable
- Special requirements for the document (often design issues), for example:
  - Whether and when nonstandard bullet styles or more than one bullet style are to be used
  - Whether heading numbering is used
  - How pages are numbered (sequentially throughout, or by chapter)

How does the editor fit into the organization?

The editor's role in relation to other members of an organization can vary greatly. In some cases, a team of people—including one or more editors—is assigned to a particular project; in other cases, work arriving at an editorial department is assigned to the next available editor, and there may be no ongoing relationship between the editor and other people working on a project.

Putting marks on paper (or into a file) is the most basic task that an editor does. More complex is the range of interpersonal and technical skills that an effective editor uses to help writers and publishing teams manage a project and reach their goal.

The editor's status and degree of authority may vary greatly, depending on the culture of the organization. Even though editorial activities may be similar, editors may be given either high or low authority within their organizations. If editing is valued by the organization, the editor is given significant authority, for example, to participate in projects, oversee writers, make changes and even create an organizational style. Status goes with this authority. (If editing is not valued or understood, the editor may be regarded as a glorified spelling-checker or "the person who gets our documents printed".)

Too often the editor's role is:

- Poorly defined
- Not always explained to the people the editor will be working with
- Not seen as needing management support
- Not seen as requiring authority appropriate to the responsibility

The individual editor needs to be involved in negotiating an appropriate role within a given organization. At a minimum, this negotiation needs to cover:

- Clarifying management issues, including the editor's level of responsibility and authority
- Ensuring writers know what the editor's role is
- Determining the timing and type of editorial involvement
- Setting priorities on the editor's time
- Setting editorial policy

Working with other members of the publishing team

In addition to analytical and language skills, editors need to be good in dealing with people. They need to understand personality and communication types; and they need to know how to negotiate, be persuasive, be assertive without being aggressive, deal tactfully but effectively with difficult people, and contribute to a team effort (even when the team is not all located in the same office). Many books on human communications, personalities, negotiation, and similar topics are available; a few are listed in "Finding more information" at the end of this chapter.

An editor may work with:

- Managers
- Project planners
- Lead writers
- Graphic artists
- Designers
- Writers
- Other editors

Working with managers

When working with managers, the editor's role includes:

- Keeping the manager informed
- Making suggestions on writing, editing, scheduling and production
- Working with the manager to establish schedules and editorial policies, for example:
  - Who does what, when?
  - How much notice is needed?
  - Define the company or project style through standards and guidelines
  - Define the types of edit to be used on the project
  - Determine what reviews should be held: formal or informal, and when
  - Determine what sort of editorial conferences should be held, and when
  - Decide who has the final say when writers and editors disagree

Working with project planners

When working with project planners, the editor's role includes:

- Assisting in determining writing and editing requirements, including:
  - Number and type of documents
  - Target audience for each document
- Assisting in developing writing, editing and production schedules
- Identifying missing or misleading information in source documents
- Identifying usability problems in product
- Editing planning documents

Working with lead writers

When a project has more than one writer, one is usually designated as the "lead writer" (this person might be the project planner). When working with lead writers, the editor's role includes:

- Sharing responsibility for coordination of writing
- Pointing out possible problems
- Offering suggestions
- Organizing group conferences on editorial matters to ensure consistency

Working with graphic artists

When working with graphic artists, the editor's role includes:

- Liaising with writer and artist to produce illustrations, looking at content, presentation, and consistency
- Helping with scheduling

Working with designers

When working with designers, the editor's role includes:

- Consulting on design questions
- Helping with scheduling
- Looking at consistency issues, for example across many documents, if different designers are involved

Working with writers

When working with writers, the editor's role includes:

- Developing an editing schedule
- Providing timely edits
- Providing private, constructive editorial conferences when appropriate
- Assisting as requested with indexing, figures, tables, examples, and any other questions
- Providing training to overcome weaknesses
- Providing a different perspective on the content and organization of the document
- Collaborating rather than confronting:
  - Put the emphasis on improvements, not corrections
  - Use negotiation, and define what's negotiable and what isn't
  - Talk about what helps readers understand or retain a message
  - Tell the writer why you do what you do
  - Listen actively; work to understand the writer's point of view by paraphrasing what the writer says, probing tactfully for more information, and using positive, goal-oriented language rather than criticism

Working with other editors

When working with other editors, a senior editor's role includes:

- Developing editorial policy
- Developing editing schedules
- Assigning editorial work equitably, with regard to each editor's skill level
- Training and mentoring more junior editors
- When more than one editor is involved on a project, establishing a style sheet, keeping it up to date, and ensuring that everyone uses it

How do you organize the flow of writing and editing work?

What's the best way to organize the division and flow of writing and editing work? I am familiar with several possibilities, depending on the individuals involved, the project, and the organization.

Some questions to consider:

- How many people are involved in the project?
- What are their skill levels?
- What are the time constraints?
- How much other work does each person have to do?
- At what stage is a document reviewed by a subject-matter expert or other person who looks at the accuracy of the content?
- How well do team members get along with each other? Do they respect and value each other's work (both methods and results)? (See also "Problems" on page 5.)

Some typical scenarios for electronic editors are:

- The editor types in changes, and the result goes directly to layout and production.

  This method is best when the writer is not available (for example, has left the company) or fast turnaround is required (for example, news). It may be used in any situation where the editor has the final say. The writer may proofread a printout of the final layout.

- The editor types in changes and questions (using revision feature, so changes are marked), and the file goes to the writer to accept or reject the changes or to request clarification if required.

  This method is best when the writers are experienced or will have their names on the resulting document, or when the writers are inexperienced and markup will assist in their education; it is equivalent to markup on paper.

- The editor types in questions and changes (without using the revision feature), and the amended file (or a printout) is returned to the writer to check and answer questions.

  This method is best when the editor is dealing with writers who are not used to working with computer files, who are confused by visible insertions and deletions, or who prefer to see only the revised version. It is also used when the editor needs more information, but telephone or fax contact isn't required.

- The editor types in changes and questions and discusses the markup with the writer.

  This method is best when training inexperienced writers (or those new to the company style), or if the editor has many comments or questions that are best resolved through discussion.

- The editor provides comments in a separate file and the writer or layout person inserts them into the document.

  This method is best when the editor doesn't have the appropriate software to edit the file directly and/or layout is most important (for example, in brochures). The writer usually proofreads a printout of the final layout.

- Technical reviews are conducted before editing.

  This method is best when a complex document is likely to be changed substantially by subject-matter experts during their review, so that the copy is reasonably stable and accurate before it reaches the editor.

- First-pass editing is done before technical reviews.

  This method is best when dealing with inexperienced writers or those unfamiliar with the company style, so that the review copy is free of grammatical, spelling, word use, and other errors that might distract the subject-matter experts from focusing on the accuracy of the information.

- Editing is done on parts of a document rather than the entire document.

  Time constraints often mean that the editor must edit pieces of a document separately (often interspersed with other work), rather than receiving the entire document to edit at one time. In this situation, the editor needs a detailed style sheet and must take extra precautions to spot inconsistencies. This method is not recommended, but is quite common.

How long does editing take?

Editors know (though their clients and managers may not) that how the time required for editing depends very much on what level of editing is required. A detailed, heavy edit requiring major rewriting is obviously going to take a lot longer than a light copy edit. So the first thing you need to do is clarify:

- What are the document's main problems? Structure? Language? Inconsistent mechanical style? Other? Given limited time, what should be fixed first, from an editorial point of view?
- What does the client want to be done? This is often quite different from the editor's list of the document's main problems.

Be prepared to negotiate the client's and editor's "want lists" when, as frequently happens, the client decides your initial estimate is too long and too expensive.

When considering how much editing you can do for a project, consider:

- The time available
- What the client wants
- What the client will accept
- The ease or difficulty of fixing what needs to be done
- What is appropriate for the reader of the document
- The importance of the document

Accurate estimation is an important factor in running a successful business (or department). Whether you are paid by the hour or by the project, you need to have a reasonably good idea of how long you (or someone else) will take to edit a document. Even if money isn't a problem, time may well be. The time that editing takes is related to another question, covered in the next section of this chapter: How many writers can one editor support?

"How long" also depends on the speed with which an editor can make changes in a file. Often you can make corrections much more quickly (for example, using search-and-replace to find and correct many instances of an error). In other situations, you may find that onscreen editing takes longer. See "What are the benefits and problems of electronic editing?" on page 4 for a more detailed discussion.

Here are some of my editing estimates, based on my personal experience. They are within the range suggested by writers such as Carolyn Rude (1998), JoAnn Hackos (1994) and others.

Some assumptions in the estimates:

1. A "standard page" contains 500 words. (This is independent of the page size, or whether the draft is single- or double-spaced. You can adjust the page count by converting the number of physical pages into the number of "standard" pages.)

   If a document contains a lot of illustrations, it has fewer words per page, but I still have to give the illustrations some attention, so I try to take that into account when people give me page counts. For example, if someone tells me the document has 350 pages, most of which contain one screen shot, I may decide that 1 document page equals 2/3 of a "standard" page and adjust my estimate accordingly. If the paper size is unusually small or large, a document page may be more or less than a standard page.
2. I am typing my comments and changes into the file, not writing on paper. (I usually work faster that way, but not everyone does.)
3. I am marking every occurrence of a change, not instructing the writer to "find and change all instances of (whatever)."

For online help, if link-checking, index editing, and "is it helpful" analysis is involved, I would use the lower range of the estimating metrics. Online help can be very fiddly and time-consuming to check, as you need to use a compiled file (if at all possible) but enter your edits into an uncompiled file.

(Remember to convert the number of help topics to page-equivalents. A commonly-used conversion factor is 1 help topic equals 0.5 page; field-level help, pop-up glossary terms, and other short help topics are each equivalent to 0.25 page.)

For Web pages and Web sites, I use the same estimates as for online help.

Table 2. Time required for editing

Substantive edit, including some rewriting	1-2 pages per hour
Copy edit	4-6 pages per hour
Light copy edit (skim document, correcting obvious errors in spelling, grammar, punctuation, consistency and completeness)	8-10 pages per hour
Quality or production edit	20 pages or more per hour (varies widely depending on what's involved)

How many writers can one editor support?

JoAnn Hackos (1994) mentions 10-15% of writing time as a rule of thumb for estimating editing time; I've seen similar figures in numerous other sources.

Hackos also points out what editors know (but managers don't always understand)—the percentage of time spent on editing varies with the stages of a project, the type of editing required, and the skill of the writer. As with other metrics (writing time, etc), she recommends keeping records of how much time editors in your group actually spend, and on what tasks, so you can get a good idea of the dynamics of your particular situation. And lastly, having an on-call editor to handle extra work at peak traffic times, or when one of the staff editors is away sick or on vacation, can smooth out the workload without a company needing to hire another staff member.

In my personal experience, one full-time editor can support around 9 full-time writers, maximum (which fits into Hackos' 10-15% estimate; 1:9 = 11%)—but if all 9 have a deadline at the same time, the editor is in deep trouble!

How do managers work with editors located off-site?

Many independent editors work in their own offices, not in their clients' offices, although they may visit the client's site frequently or occasionally for meetings.

Most employees work on-site, although telecommuting (at least part of the time) is becoming more common. However, many managers actively resist the telecommuting option, usually because they have limited or no experience working in dispersed groups. Resistance also comes from some on-site co-workers, for a variety of reasons.

Having some people working off-site provides much opportunity for misunderstanding and resentment from co-workers and managers, who have expectations about team members' availability (for meetings or simply to answer questions) and who aren't sure whether off-site workers are doing their share of the work.

A major complaint from managers and co-workers who are not used to working with editors, writers and others who are working off-site is: "If they're not in the office, how do I know that they're working?"

Experienced managers of off-site workers know that good management practices are much the same wherever people are located. A full discussion of managing remote workers would easily fill a whole book, so this section merely mentions briefly a few points to keep in mind. Managers might also refer to the brief list of books on human communications, personalities, negotiation, and similar topics in "Finding more information" at the end of this chapter.

Managers and editors need to work together to:

- Define the editor's role, both within the organization as a whole, and for each individual project, as described earlier in this chapter; ensure that all members of the group know what this role is.
- Define deliverables (what level of edit) and a time frame for each project or document: what work is expected to be done each week.
- Set goals for editing, both for individual documents and overall within the department, by difference time scales: weekly, monthly, six-monthly—whatever is appropriate for the job.
- Track progress against the agreed goals, using a spreadsheet.
- Determine the technical and operational requirements for the job; see "Working with the client: the necessities" in Chapter 2 for details.
- Determine who supplies whatever equipment is needed for the off-site worker. Independents usually, but not always, provide their own equipment; employees usually, but not always, are provided with equipment by their employer.
- Schedule on-site meetings on specific days, as far in advance as possible, so all who need to attend can make arrangements to be there.
- Determine availability requirements; for example, whether the off-site worker is expected to be available for telephone contact between certain hours, how flexible are those hours, and whether workers are expected to keep others informed of their availability (in the case of employees, the requirements should be similar, if not identical).
- Specify any security requirements for materials kept at an off-site location, including non-disclosure issues regarding others (family, other members of the independent's company, and so on) at that location.
- If several editors are involved in a project, agree upon methods to ensure consistency in their work; for example, who is the lead editor—the person who is responsible for the contents of the style sheet, and has the authority to make and enforce decisions about consistency and style?

How do you specify the editor's role and responsibilities for a job?

You might provide the general definition of an editor's role in a job description or a series of descriptions; for example, copy editor, developmental editor, production editor, editorial coordinator, and so on.

Statements of deliverables and time frames and (where relevant) the technical and operational requirements for the job, and agreements on who supplies what hardware and software can be part of a formal publication plan or included in a simple letter of understanding that states "here's what we have agreed."

Finding more information

Elgin, Suzette Haden, *How to disagree without being disagreeable: Getting your point across with the gentle art of verbal self-defense*, 1997, John Wiley & Sons, ISBN 0471157058

Hackos, JoAnn, *Managing your documentation projects*, John Wiley & Sons, 1994, ISBN 0471590991

Leonhard, Woody, *The underground guide to telecommuting*, Addison-Wesley, 1995, ISBN 0201483432

Littauer, Florence, *Personality plus: How to understand others by understanding yourself*, 1992, ISBN 080075445X

Maxwell, John C., *Developing the leader within you*, Thomas Nelson, 1993, ISBN 0840767447.

Miller, Casey and Swift, Kate, *The handbook of nonsexist writing for writers, editors and speakers*, 3rd edition, The Women's Press, 1995, ISBN 0704344424.

Rude, Carolyn, *Technical editing*, 2nd edition, Allyn & Bacon, 1998, ISBN 020520032X

Tarutz, Judith, *Technical editing: The practical guide for editors and writers*, Addison-Wesley, 1992, ISBN 0201563568

van Buren, Robert and Buehler, Mary Ann, *The levels of edit*, 2nd edition, Jet Propulsion Laboratory, Pasedena, CA, January 1980, JPL Publication 80-1, 26 pp.

Chapter 2
Working electronically

Some editors may have the luxury of needing to deal with files in only one format, produced by only one program, and managed through software on their employer's internal network.

Many editors (especially the independents) have to work with files in more than one format, sent to them on disk or over the Internet, often by people who don't understand how to check files in and out, compress files, or do a variety of other tasks that may be automated when done internally.

In either case, you need to know some basic techniques for dealing with files if you are going to be editing them electronically. These techniques apply to files in any format, but exactly what you do depends on which word-processor, desktop publishing program, or other software you are using.

This chapter discusses the following topics:

- Working with the client: the necessities
  - Receiving and sending files
  - Using virus-checking software
  - Using a file naming, tracking and archiving system
  - Tracking information you and the client require
  - Working with fonts and printer drivers
  - Authorizing someone (granting permission) to edit a file
  - Keeping track of multiple text and graphics files in one book or project
  - Using a reader, PDF file, or print file
  - Converting between file formats
- Editing the file: the necessities
  - Checking spelling and grammar
  - Finding and replacing text
  - Marking and tracking changes
  - Inserting comments and questions
  - Applying and changing paragraph and character styles (formats)
  - Applying and changing document templates
  - Changing page layouts and table layouts
  - Using automatic cross-references
  - Editing indexes and tables of contents
  - Editing headers and footers
  - Editing footnotes and endnotes
  - Editing and annotating graphics
  - Accepting or rejecting editorial changes and comments
- Finding more information

Working with the client: the necessities

In addition to clarifying some management issues with the client (for example, what exactly are you expected to do, how much, and when—as discussed in Chapter 1, "Defining the electronic editor's role"), you need to ensure that the technical side of the relationship works correctly. (And don't forget that tactful communication skills are necessary in all client relationships, but especially when you aren't talking face-to-face. I've listed some useful books in Appendix C, "For more information.")

This section lists the things I need to know how to do when dealing with the client. I often have to teach the client how to do these things, so I have to understand them.

Details on some of these items are outside the scope of this book, but I'll say at least a few words about each of them later in this chapter.

- Receiving and sending files (including compressing and uncompressing them)
- Using virus-checking software
- Using a file naming, tracking and archiving system
- Tracking information you and the client require
- Working with fonts and printer drivers
- Authorizing someone (granting permission) to edit a file
- Keeping track of multiple text and graphics files in one book or project
- Using a reader, PDF file, or print file
- Converting between file formats

See also Appendix A, "Backing up data and programs."

Receiving and sending files

When sending and receiving files and e-mail, follow these rules:

- Ask whether the recipient prefers e-mail in plain text or HTML format. Many older e-mail programs don't handle HTML, or don't handle it well, and many people simply prefer their notes in plain text. If your correspondent doesn't understand the question, and you like using HTML in your e-mail, you could send a test message and ask if it looks the way you intended.
- Never send attachments with e-mail unless you have agreement from the recipient first. Because attachments can carry viruses, many people do not appreciate receiving unexpected ones.
- Get agreement on what word processor format and version to use for the files. For example, if you're using Microsoft Word, is it Word 6, Word 95 (a.k.a. Word 7) or Word 97 (a.k.a. Word 8)? If you can't use the same format, and must convert, problems may arise. See "Converting between file formats" on page 26 for more information.
- Check your files for viruses before you send them. See "Using virus-checking software" on page 23.
- Compress attachments before sending them, unless they are quite small. (Compressing is often called "zipping" because a common compression format is .zip.) Make sure the recipient can uncompress the files you send. If necessary, provide a copy of the software and instructions on how to use it, or use a program that creates a self-unzipping file (the recipient only needs to double-click on the file to uncompress it). Two popular compression programs for PCs are WinZip and Aladdin Expander (see "Finding more information" on page 32).

- If you or your client have an FTP site, then you can upload and download files using an FTP program. (If one of you has your own Web domain, then you probably have an FTP site as part of the domain; if you only have an e-mail address and perhaps some space for a personal home page, but not your own domain, then you probably don't have an FTP site, but check with your Internet Service Provider to be sure.)

  FTP has several advantages over e-mail attachments: it's generally faster, avoids any file size limitations imposed by your e-mail program, and is less likely to garble a file by converting it into something you don't want.

  Many FTP programs are available for Windows, including ones that come with Web browsers such as Netscape Navigator. You can also use the very basic FTP program that comes with Windows itself, if you're comfortable working from a DOS command line (open a DOS window and type `FTP ?` to get a list of commands; type `EXIT` to close the DOS window when done).

Using virus-checking software

If you don't already have a good anti-virus program on your computer, get one immediately, install it, and use it. Set it up to automatically check all incoming files. Although many viruses are more of a nuisance than a disaster, losing a day's work while you clean your system can be seriously damaging to your schedule; if you're an independent, innocently passing a virus to a client can be at best a major embarrassment and often seriously damaging to your professional reputation.

Even more importantly, keep your virus-checking data files up to date. The program uses its data files to recognize viruses; new viruses often won't be recognized by an old data file. If you're not sure how to get updates for the data files, check your documentation. If you're not disciplined enough to get and install updates at least once a month, use a virus checker with an "automatic update" feature that will do all the work for you—logging on to the appropriate Web site, finding the required file, downloading it, and running it.

See "Finding more information" on page 32 for the Web addresses for some of the most commonly-used anti-virus programs, in case you want to compare features and prices. All are available from many retail stores and mail-order houses.

Using a file naming, tracking and archiving system

Be sure you and the client agree on when, where and how often you save files on their server. Do you upload files only when you're finished editing them, or do you upload your latest (unfinished) version once a day, or what? If you can't upload files directly to their server, to whom do you send them?

Does the company you're working for have a file naming, tracking and archiving system? If so, use it. If not, encourage them to develop and enforce such a system.

If you're an independent, you need a way to keep track of files on your own computer and archive them. Here's a fairly simple manual tracking system that I use:

1. Create a folder for each project or document. Create several subfolders in each folder: In, Pending, Out, and Archive (or whatever terms you prefer).

   If the project has multiple files (for example, separate graphic files), you might prefer to make subfolders to hold the graphics—I try to follow the convention used by the client.

2. When you receive a file, put it into the In folder for that document.
3. Copy the file into the Pending folder, and edit that copy. Don't touch the original.
4. When you've completed editing the file, move it into the Out folder. You know that anything in the Out folder is ready to send back to the client. I rename the file to indicate its changed status (for example, I might rename "Procedures" to "Procedures edited").
5. After you send the edited file, move it to the Archive folder. I usually archive a compressed file, to save space.
6. If you later edit the same files again (for example, after the writer has revised them), make a separate folder for the second edit.
7. At some point I'll remove all the files (originals and archived edited copies) from the hard disk; depending on the client, I may keep a backup copy or I may not. (If there's a security issue, I'll generally remove the files from my system and send all the backup copies to the client.)

You may also want to include tracking information in the file itself, for example in the header or footer of each page, or on a cover sheet that's included in the file but removed when the document is complete, approved and ready for distribution.

You may also need to consider access controls and, particularly if you work in a group, an audit trail of editorial changes to documents. A full discussion of the issues involved is well beyond the scope of this book; see Rude (1998) for a summary.

Tracking information you and the client require

Does the client have a system for tracking information required for accounting or other purposes? If so, use it. Otherwise, devise one for your own use. Even if the client has a system, the data required may not be what you need to know for your own use.

You need to keep track of your projected and actual editing schedule, including the projects you're working on, the length of time you estimate you need to do the work, when you expect to receive the files, when they need to be returned, what level of editing is required, how long you actually took to edit each file, and the accounting or other code to which you'll bill your time.

What software to use? You probably don't need project management software, unless the client wants you to provide data in that format. A spreadsheet normally does all you need, and if you set it up properly you can extract a wealth of information about your editing projects, your clients, and your own work patterns. Even a table in your word processor is better than nothing!

Here's an example of two simple tables of relevant information. You can set up a spreadsheet to calculate some of the details from data you enter, and automatically insert data in several places at the same time. You need to consult the user guide or online help for your spreadsheet program to learn how to do this.

Client	Project	Estimate hrs req'd	Planned start date	Actual start date	Days late starting[1]	Actual hrs req'd[2]	Differ-ence[3]	Comments
AAA	AAA-1							
	AAA-2							
BBB	BBB-1							
	BBB-2							

Figure 1. Example summary table or spreadsheet

Date	Start time	End Time	Hours spent	Running total (hours)	Hours left to finish work	Comments

Figure 2. Example table or spreadsheet for a project (repeat for each project)

From this information, you can find out:

- Which clients are habitually late getting work to you
- How good your estimates are
- How much project-related (billable) time you spend each day

You can use some of this same information in other spreadsheets or your accounting program.

Working with fonts and printer drivers

If you're doing anything related to page layout, even as simple as checking page breaks, you need to ensure that you are using the same fonts and printer driver as the person who prepared the document.

Many programs allow you to "embed" fonts into a file so they are transferred along with the file from one computer to another. If you and the other person don't have the same fonts installed on your computers, you should make sure the person sending you the file embeds the fonts used.

If you're working on-screen, you don't need to have the same brand of printer (that the other person is using) attached to your computer, but you do need the identical printer driver (software) installed, and you need to choose it as your printer when working with any document that requires it—if you want to see the same line breaks, page breaks, fonts and some other layout features that the writer used.

If you're only dealing with drafts, and aren't concerned about the details of page layout, you may not need to worry about the fonts or the printer driver. Your system will substitute fonts; things may look a bit odd, but that need not interfere with your editing. For example, special bullet characters may turn into odd symbols, numbers or letters.

If you want to print the file, you have two choices: use the correct physical printer (as well as the correct printer driver), or change the driver to match the printer you do have, and understand that what you're getting is a draft, which may not match the real thing.

[1] Calculated from Actual start date minus Planned start date.
[2] Running total (hours) from project spreadsheet (Figure 2)
[3] Calculated from Actual hours required minus Estimated hours required.

Authorizing someone (granting permission) to edit a file

Some software can make a file read-only, except for people who are authorized to edit it. If you're using such a program, learn how to authorize someone to edit a file, because you may need to explain the process to the writer. (For an example, see "Marking and tracking changes" in Chapter 5, "Editing using Lotus Word Pro.")

If you get stuck with having to edit a read-only file, you should be able to make a copy of the file under another name, and edit the copy.

Keeping track of multiple text and graphics files in one book or project

You'll need to know where your software stores the files you're working on. If multiple files are involved, you must be sure to bundle them all together when you send them to someone else. Most software stores files by default in places that are not useful to you as an editor, so you'll need to learn how to change the settings so the files are stored where you want them to go. Because "where you want the files to go" will probably be different for different projects—so you can keep them separate—you may need to change the settings frequently, or adopt some strategy to ensure everything goes where it should.

I generally use a system similar to the one I use for tracking and archiving files: I create a folder for each project. I may store all the project's files in that one folder, or I may create subfolders for, say, graphics and text.

Some software has utilities you can use to bundle multiple files into one for archiving or distribution purposes. Otherwise, if you know where everything is, you can simply compress all the files into one—being sure to keep the subfolder structure intact, if that is required by the publishing software. See also "Receiving and sending files" on page 22.

Using a reader, PDF file, or print file

Readers, PDF files and print files have their uses, but helping you edit electronically is not one of them. However, it's worth knowing about these techniques, in case you need to print on a printer that you don't have, or from a machine (for example, your travelling laptop computer) that doesn't have your publishing program on it, or you've been asked to edit on hard copy (so the fact that you don't have the publishing software doesn't matter).

Readers. Many people are familiar with Acrobat Reader, but not with the readers available for Microsoft Word, FrameMaker and other programs. Readers can usually be distributed without the recipient needing a license, but check the documentation to be sure. Readers may come on the CD with the main program, or you may need to get them from the distributor or download them from the company's Web site.

In most cases distributing a file and reader will result in a file that recipients can't change or annotate, although they can read the file online and print it.

Printing to file. This technique results in a file that can normally only be printed, not viewed on-screen, unless the recipient has software that can display print files. Like reader files, print files can't be changed or annotated.

PDF files. PDF (Portable Document Format) has pretty much taken over the "print to file" role, and has the advantage of easily being viewed online, as long as you have Acrobat Reader. If you have Acrobat Exchange, you can attach comment notes to the file; see Chapter 7, "Editing using Adobe Acrobat" for more information.

Converting between file formats

File conversion can be a problem. (Now there's an understatement!)

If a document is being converted from one format (used by the writer) into a second format (used by the editor) and converted back to the first format when it's returned to the writer, formatting, graphics and tables are likely to go awry (if they don't dissolve into total chaos). Conversion between Windows and Macintosh programs can be even worse, although with compatible software, it's usually no worse than conversion between two Windows-based programs.

If the formatting of the document matters at the stage when you're editing it, then if at all possible, use the same software as the writer. Ask the client for a copy of the program you need. Uninstall it afterwards if necessary.

If you're working on a draft, and the formatting doesn't matter at that stage (and graphics aren't embedded so they don't get messed up), then conversion isn't much of a problem, and it may be the easiest solution to a lack of a common software package. But watch out for things like em and en dashes, bullet points, and other symbols, which often don't convert correctly. You might need to convince the other person to not use symbols, but rather to use character combinations that can be changed into symbols later; for example, use two hyphens (--) for an en dash and three hyphens (---) for an em dash.

Note that I'm not just talking about converting between, say, WordPerfect and Word or between Word and FrameMaker. Just moving from Word 6 to Word 97 and back again can cause interesting problems, even if you have the latest filters. Test—test—test before you rely on conversion.

Sometimes file conversion is the best solution. If the purpose is to get a document from one format to another, and it's going to stay in the second format, then file conversion is quite appropriate. For example, you may receive files from contributors to a magazine; these files may arrive in a variety of formats but will ultimately be put into one common format that goes to the layout artist.

Editing the file: the necessities

This section describes file-editing necessities in general terms. Chapters 3 through 7 of this book give details for a range of common programs. If the program you're using isn't in this book, I hope the general list will help you find out what you need to know, using the program's online help and user guide.

I am often required to learn about a new program at very short notice, so I have compiled a checklist of the things I have to know in order to do my job.

Here is my list of the main things I have to know how to do when editing the file:

- Check spelling and grammar
- Find and replace text
- Mark and track changes
- Insert comments and questions
- Apply and change paragraph and character styles (formats)
- Apply and change document templates
- Change page layouts and table layouts
- Use automatic cross-references
- Edit indexes and tables of contents
- Edit headers and footers
- Edit footnotes and endnotes
- Edit or annotate graphics, including photographs and screen captures
- Accept or reject editorial changes and comments

Checking spelling and grammar

Even if the writer assures you that the spelling has been checked, check it again yourself. You might have to change a setting or two to make sure the spelling checker looks at the entire file.

Editors know that software won't find correctly-spelled wrong words, but the spelling checker can be useful for a first cut. It's also good for finding doubled words such as "the the."

Although many editors sneer at grammar checkers, they can be very useful. For example, I use them to search for passive constructions. I can then look at each instance and decide whether that particular use of a passive is appropriate or not—or whether the construction is actually passive (grammar checkers often find verb forms that are not passive). Check the options provided by your grammar checker and select those that can help you identify possible problems quickly. Turn off any options that just get in the way by mis-identifying a lot of problems.

Finding and replacing text and other document elements

Find (sometimes called Search) is a much more powerful tool than most people ever discover. You can usually search for a wide variety of things in addition to text. For example, you can search for and replace specific formatting (bold, italics, hidden text and so on) and special items such as paragraph marks, tabs, page breaks, fields or graphics. You can often use wildcards to fine-tune a search in quite complex ways (familiar to UNIX users of the "grep" function, but often unknown to users of word processors such as Word).

Learn to use the advanced features of Find—it will speed up many editing tasks dramatically.

Marking and tracking changes

The electronic equivalent of the editor's pen is the "tracking changes" or "revision" feature. If you use this, all your insertions and deletions can be made visible or hidden, so the writer can see exactly what you've done and the file can be archived with all the changes in it. The writer can accept or reject your changes with little or no retyping required. Not all programs have this feature.

Even if this feature is available, you may want to avoid using it, unless the client requires you to use it. Tracking changes can increase the size of the file dramatically, especially if you move large amounts of text or graphics (because the text or graphics will be in the file twice–once marked for deletion and once marked for insertion). Large files can slow down the program or even cause it to stop working.

Some other ways to track changes include:

- If someone (an auditor, for example) needs to see the changes you made (not just the results of those changes), you can use a document comparison function to compare the original file (which you archived before working on a copy of the original) with the edited file and mark the changes. This technique is useful when the need for change tracking is uncommon rather than normal procedure.
- You can set up the software to put change bars (marks, usually vertical lines) in the margins to indicate lines that have changed, but not to retain all deletions. Then the writer can see at a glance where changes have been made. This technique isn't too helpful if you make changes to almost every line of the file, a common occurrence when copy-editing. However, you may want to ask writers to use change bars when they add or rewrite material and

return a document to you to re-edit, so you can focus on those sections rather than reading the entire document through in detail a second time.

Inserting comments and questions

In addition to (or instead of) tracking changes, you can insert editorial comments. Typically these can be printed as footnotes, with a reference mark in the text. I use them for questions to the writer. Some workgroups prefer all changes to be made as comments (and some programs provide only a comment facility, not a facility for marking insertions and deletions); in these cases, the writer must copy or retype the accepted changes into the body of the document.

Applying and changing paragraph and character styles (formats)

If your writers aren't using styles (formats), they should be. More likely, they use styles, but they cheat a lot. You may need to educate them, or clean up the mess they've left. Learn where the settings for paragraph and character styles are stored and how to change them.

If you're editing a document produced by someone who hits the Enter key twice between paragraphs, or uses it to provide extra space before headings, tables and figures, you have to deal with the "empty paragraph" problem—paragraphs with no text in them. Unless it's a one-off document and isn't worth the trouble to fix, you'll not only need to clean up the formatting, you'll also need to teach the writer how to use styles.

Another common problem is the writer who doesn't use Heading styles, so you can't compile a table of contents.

When cleaning up a document (even if it doesn't include empty paragraphs), avoid making manual changes to individual paragraphs, unless you know you are working with a one-off document. If there's any chance the document will be converted into another format, or loaded into a different program, or have a different template applied to it, always use styles and don't change individual paragraphs.

Similarly, in most cases you should use character styles rather than applying changes manually to words. If you use font changes for highlighting (say, a change to a monospaced font for filenames, or bold or italic for emphasis or to indicate keys or parts of the user interface), make sure your writer creates and applies a character style for that font change. Then, when a designer decides to change the fonts or the highlighting used in the document, only the style needs to be changed—in one place.

Applying and changing document templates

Document templates may include a variety of information:

- Page layout, paragraph and character styles (formats), standard header and footer information, user variables, (AutoText) and so on
- Standard wording (boilerplate) for copyright and trademark information, company address, and the like
- Macros and other customization of a program

Some people use the word "template" to mean a skeleton document containing fixed headings and places to type information that changes, as in for example departmental memos or forms used to collect information for a variety of purposes. If your client asks for a "template," be sure to find out whether they mean a skeleton document or a design template.

Editors are often called upon to design templates to supplement style guides, or to make sure writers use the templates provided by a company. If you need to work with template, you need to be familiar with what goes into them, how to use them, how to modify them, how to quickly change a document from one template to another, and what sort of problems arise if writers haven't followed the rules for using templates and styles.

Changing page layouts and table layouts

In some organizations, most editing is done before page layout, but in other organizations the writer is laying out the pages while composing the text. In the latter case, you need to know what devices the program uses to place graphics and text on the page, for example sections and frames. If frames are used, they may or may not move when the text around them changes. The captions to graphics may or may not be linked to the graphic and move with it.

You need to be familiar with the basics of such things in the program you're using, so if something goes a bit weird, you have an idea of what's gone wrong and how to fix it. Some things to check: page size (US letter size? A4? other?), margins, columns; check all chapters to see if something has changed (that should not have changed).

Using automatic cross-references

If your writers have typed in references to other parts of the document, those references can easily get out-of-date if you reword a heading, add or remove figures, or reorganize sections. You should replace any typed cross-references with the program's automatic ones; then when you update fields, all the references will update automatically.

If the file you're editing is going to be put into another program for layout, check first to see if the automatic cross-references will convert; if they won't convert, you'll need to turn them into plain text just before the manuscript goes to layout (ask the layout person how to handle page number references—an old-fashioned "xx" or "xxx" may be the best solution. After layout, someone can manually insert the correct page numbers.

Editing indexes and tables of contents

To edit an index, you need to edit the index entries, not the terms that appear in the index itself; otherwise, the next time the index is compiled, the changes you have made will be overwritten. To electronically edit an index, you need to know how to get to the index entries themselves. These are often formatted as hidden text, or stored separately from the main file, with a reference mark in the file. (I am assuming that the index is generated from markers in the file, instead of being completely separate.)

Tables of contents are usually compiled from text tagged as various heading levels, or marked in some other way. To edit a table of contents, you need to edit the heading text, not the text that appears in the ToC; otherwise, the next time the ToC is compiled, the changes you have made will be overwritten.

If you are not making corrections directly into the file, you could electronically mark up edits to an index by working on a copy of the compiled index. Copy the index into a separate file, edit it and return it to the writer, who will then have to make the changes to the index entries in the original file.

Editing headers and footers

When working with documents to be printed, you'll need to edit the headers and footers. In many cases, you will not be able to make changes to headers and footers in the same view of your file as you make changes to text. Check your program's online help, or look in later chapters of this book, to find out how to get to the headers and footers and edit them (this may be on a "Master Page" or in a "Headers and Footers View").

While you're looking at the headers and footers, check the pagination. Do you want page numbers to start at 1 on the first page of the main text (for example, following pages i through xii in the front matter)? Do you want a more complex numbering scheme, such as "page x of y" or some variation? You'll need to know how to make the page numbering work, in case your writer doesn't know how.

Editing footnotes and endnotes

Footnotes and endnotes (and the text markers associated with them) are features that you may not be able to edit in the main text view. If that's the case, you will need to check your program's online help to find out how to get to footnotes before you can edit them.

Editing and annotating graphics

Some graphics (usually fairly simple ones like flowcharts and organization charts) are created using tools within the word processor or publishing program itself and can easily be edited using those same tools. It's reasonable for you to correct spelling and capitalization directly in those graphics.

Other graphics are created by outside programs, or are screen captures, and need to be edited using the appropriate program. You can best deal with these by inserting comments detailing any changes needed. Occasionally I've resorted to using built-in drawing tools to produce crude callouts (in lurid colors) to identify exactly where I think a change is needed, if it's difficult to describe in words. The writer or graphics person can easily delete my callouts where they are no longer needed.

Accepting or rejecting editorial changes and comments

If you've used the program's revision feature to mark your changes, the writer can either use the file with all the changes in it (but hidden), accept all your changes, or go through the changes individually, accepting some and rejecting others. The writer can also view your comments and make the associated changes.

After revisions are accepted or rejected, they no longer appear as revisions. Comments can be tricky, because they are automatically removed from the file. If they are hidden, people can view and print the file without knowing the comments are there, but anyone can make them visible. Since comments often include discussion among the writers, reviewers and editor, you may want to ensure that whoever does the final pass on the file removes all the comments before the document is made public. Archive a version with comments if you need them as an audit trail.

Finding more information

The programs listed here are available from a wide range of software resellers, as well as directly from the companies that produce them. Mention of these programs does not constitute endorsement of any of them. Other programs are available that do much the same things.

Anti-virus programs

Norton Anti-Virus (owned by Symantec):
  http://www.norton.com/ or (better)
  http://www.symantec.com/nav/index_product.html

Dr Solomon's Anti-Virus (recently acquired by Symantec)
  http://www.drsolomon.com/products/antivirus/index.cfm

McAffee Virus Scan (search through their store to find products for operating systems in addition to Windows 95/98):
  http://www.mcafee.com/

PC-cillin 6 (Windows 95/98)
  http://www.antivirus.com/products/pc_cillin.htm

Compression programs

WinZip
  http://www.winzip.com/

Aladdin Expander (for Windows) and StuffIt Expander (for Macintosh),
  http://www.alladdinsys.com/expander/

Chapter 3
Editing using Microsoft Word

One of the most valuable tool-use skills for an electronic editor today is a good working familiarity with Microsoft Word. Even if you work for a company that uses some other product, chances are you'll need to deal with Word documents at some point, especially if you want to change jobs or gain new clients.

If you're already using Word, do learn more about it: how to use it faster, easier, more efficiently; and how to solve common problems. Subscribe to some of the Word information sources (see "Finding more information" for a list).

By becoming a problem-solving resource, employee editors can improve their chances of taking on a more senior role. Freelance editors can offer an extra skill to prospective clients and (potentially, at least) improve their earnings, possibly moving into a more consultative role.

This chapter provides a brief summary of the essentials an electronic editor needs to know about using Microsoft Word:

- Setting up Word to make editing easier
- Checking spelling and grammar
- Finding and replacing text
- Marking and tracking changes
- Inserting comments and questions
- Editing an index
- Editing a table of contents
- Changing page layouts
- Editing headers and footers
- Editing footnotes and endnotes
- Changing table layouts
- Using automatic cross-references
- Editing or annotating graphics, photographs and screen captures
- Changing document properties
- Accepting or rejecting editorial changes and comments
- Removing comments from a file
- Finding more information

See also Chapter 4, "Advanced problem-solving in Microsoft Word."

Notes:

1. The explanations in this chapter are for Word 97, but other versions of Word have similar functions. Major differences are noted.

2. Word 6 is part of Microsoft Office 4.x, which runs under Windows 3.1 (and is occasionally used on a machine running Windows 95). Word 95 (Word 7) is essentially identical to Word 6, but runs under Windows 95/98. Word 97 (Word 8), which also runs under Windows 95/98, has a different file structure to Word 6 and Word 95. Word 2000 (Word 9) is essentially the same as Word 97 but with new features added. This book uses Word 6/95 to refer to both Word 6 and Word 95.

Setting up Word to make editing easier

If you're using Word 97, make sure you have Service Release 2 (SR-2) for Microsoft Word or Microsoft Office. To check which version of Word you have: on the **Help** menu, click **About Microsoft Word**. If the first line in the About window does not say Microsoft® Word 97 SR-2, you need to upgrade.

If you use Word a lot, you'll want to take the time to set up the interface to suit your work and your personal preferences. But even if you use Word only occasionally, you can make a few quick changes to make your work much easier. Here are the things I always change when I install Word on a new machine:

- Turn off fast save and turn on backup copies
- Display paragraph marks, tabs, text boundaries and other items
- Set up editing and printing options
- Set up the spelling and grammar options to suit your preferences
- Ensure your user information is correct
- Control Word's AutoCorrect functions
- Add a toolbar button for an easier-to-use style list (Word 97)

You can change many other Word features to suit your preferences and working habits, but I'm only mentioning the very basics needed to get to work editing.

Tip If you use Word a lot, you'll want to learn some of the many keyboard shortcuts. Look for "Keys - shortcut keys" in the online help; you might want to print out a copy for reference.

Turn off fast save and turn on backup copies

Why turn off Fast Save? Two main reasons: file size can increase dramatically, because deletions remain in the file (though hidden from your view) until the file is saved normally, and more importantly, documents can get scrambled in the middle of a Fast Save. You don't need it (this feature dates from the days of slow disk access speeds), so why take a chance?

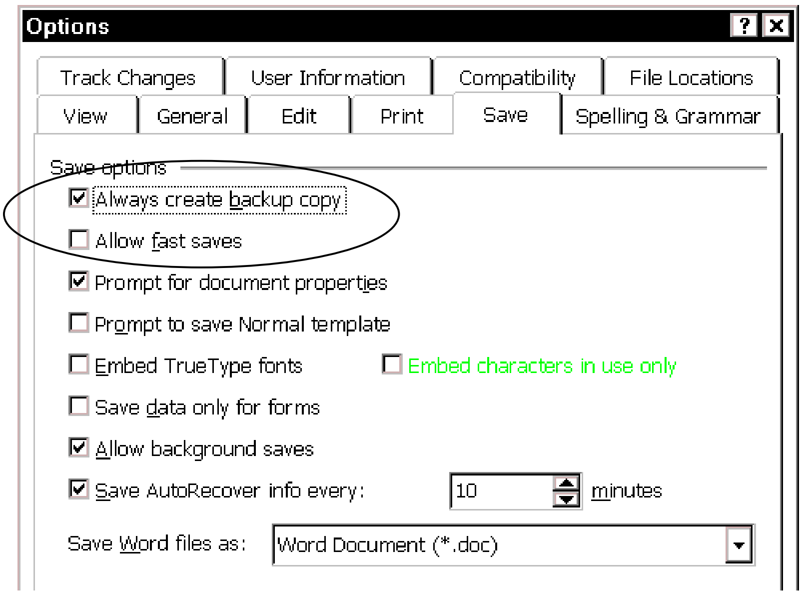


Figure 3. Choosing Save options

To turn off Fast Save:

1. On the **Tools** menu, click **Options**. On the Options dialog, choose the **Save** tab.
2. Deselect **Allow fast saves**, as shown in Figure 3. I recommend you select **Always create backup copy** unless you are very short of hard disk space.

Display paragraph marks, tabs, text boundaries and other items

Editing (and writing) is much better done when you can see as much as possible of what's going on in Word. You need to know whether the writer has included unnecessary blank paragraphs or tabs, or made the tables or graphics too wide so they intrude into the margins of the page, so you can fix these problems.

On the **Tools** menu, click **Options**, choose the **View** tab, then select **Text boundaries** (in the Show group), **Tab characters** and **Paragraph marks** (both in the Nonprinting characters group), as shown in Figure 4.

You'll probably also want to select **Drawings** and **ScreenTips** in the Show group. During part of your editing, you may want to select **Picture placeholders**, to speed up page loading (graphics will be represented by a blank box the size of the graphic).

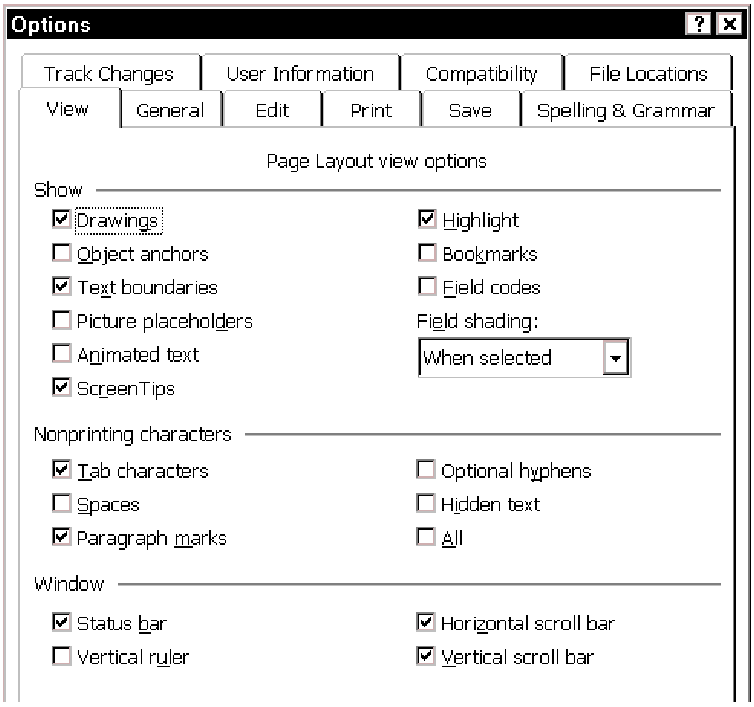


Figure 4. Choosing View options

Set up editing and printing options

While you're in the Options dialog, choose the **Edit** tab (Figure 5) and choose the editing options that suit the way you work. One that I hate is **When selecting, automatically select entire word**, but you may find that feature very helpful. I like **Typing replaces selection**, but many people hate it.

On the **Print** tab (Figure 6), select **Update fields** and **Update links** (in the **Printing options** group), and **Drawing Objects** (in the **Include with document** group).

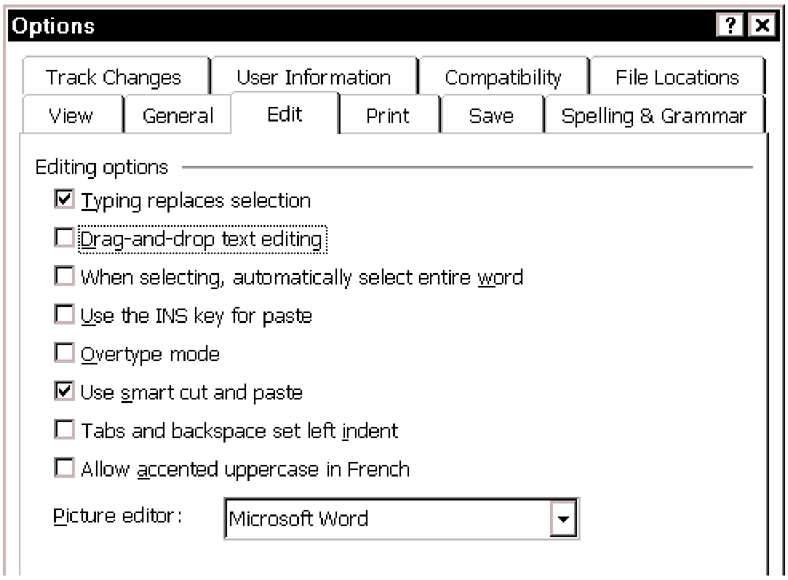


Figure 5. Choosing Edit options

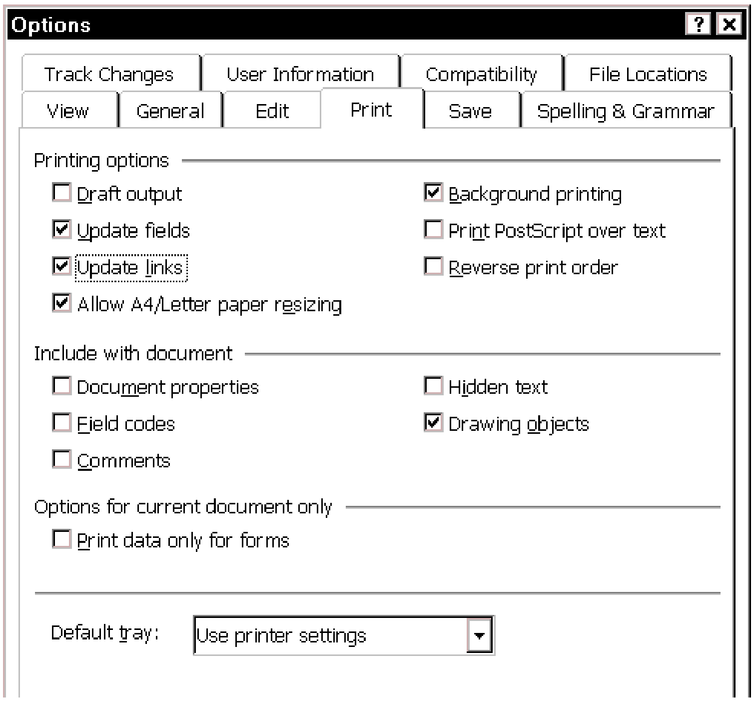


Figure 6. Choosing Print options

On the **General** tab (Figure 7), deselect **Update automatic links at Open**. If you edit documents that have links to spreadsheets or graphics, but you don't have the linked objects on your computer, you may find that the linked objects disappear from your copy of the file if you have this checkbox selected.

Exception: If you're the last stop before printing a final copy of the document, you need to make sure you have those spreadsheets or graphics available—either on your computer, in the correct folder, or on a network to which your computer is connected; then you should select this checkbox to make sure the most up to date information is included.

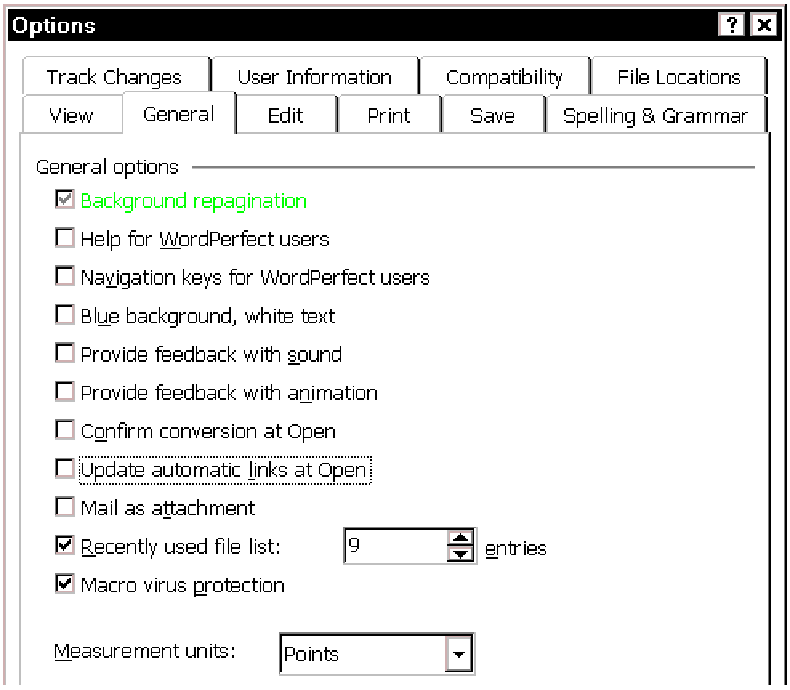


Figure 7. Choosing General options

Set up the spelling and grammar options to suit your preferences

To set the spelling and grammar checking options to what you want, on the **Spelling & Grammar** tab of the Options dialog (Figure 8), choose settings that are useful for you.

Word 6/95 **Spelling** and **Grammar** are separate tabs of the Options dialog. On the **Grammar** tab, click **Customize Settings**.

In the **Spelling** section:

- I always turn off **Check spelling as you type** (even when writing) and **Suggest from main dictionary only** (because I normally include custom dictionaries).
- If you use a custom dictionary that includes words in all uppercase and words with numbers (for example, AS/400), you would probably want to uncheck **Ignore words in UPPERCASE** and **Ignore words with numbers**.
- I find **Ignore Internet and file addresses** useful, because so many of these are not used frequently enough to bother adding to a dictionary.
- Here you can also check which custom dictionaries are active for this document, and add or remove dictionaries by clicking the **Dictionaries** button.

In the **Grammar** section:

- I deselect **Check grammar as you type** (even when writing).
- I select **Check grammar with spelling**.
- I select **Technical writing style** (unless I'm working with some other type of document), and click the **Settings** button to go to the **Grammar Settings** dialog.

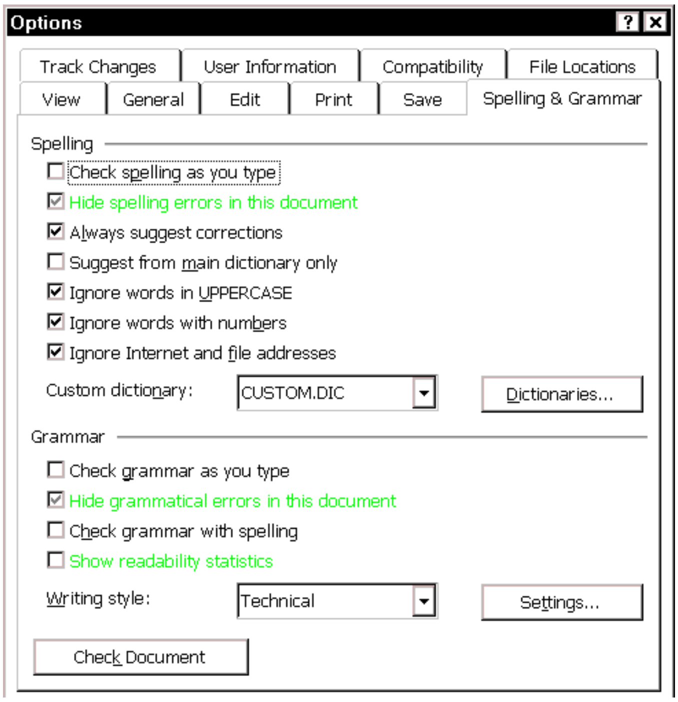


Figure 8. Choosing Spelling and Grammar options

On the **Grammar Settings** dialog (Figure 9), you can choose some useful settings and turn off any that annoy you. The items I find most useful are:

- **Passive sentences**. After the program finds them for me, I can decide whether to change them to active constructions, leave them passive (sometimes the passive voice is more appropriate), or decide that the construction isn't actually passive although the computer interprets it as such.

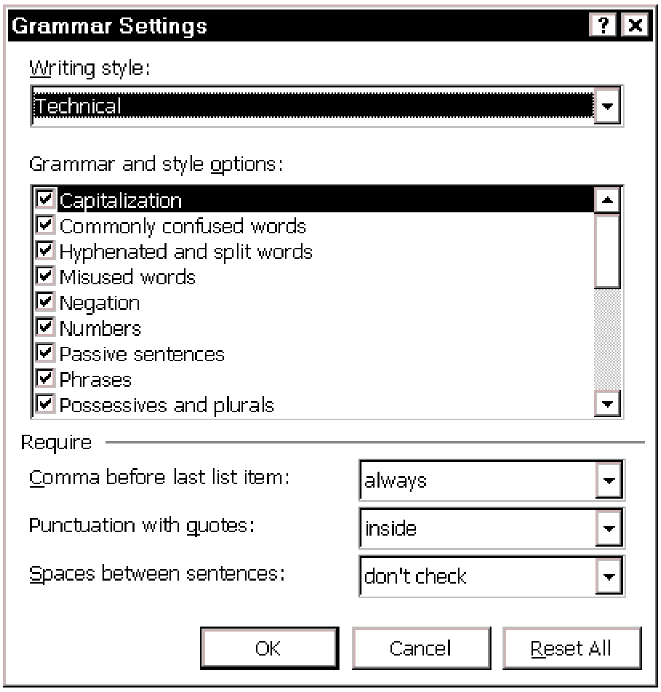


Figure 9. Choosing grammar settings

- **Comma before last list item**. Because the standard in US English is to include the comma, and the standard in Australian English is not to include the comma (except when omitting it would cause confusion), I let the software find all the constructions that might be wrong in a particular document.
- **Punctuation with quotes**. Again, the standard in US English is different from that in Australian English.

I find most of the **Style** choices (visible when you scroll down in the options list) irritating—because they find a large number of constructions that are not wrong and just waste my time in checking—so I normally turn them off. However, if you find any of them useful, leave them checked.

You can always change the options for a specific document by pressing **F7**, then clicking the **Options** button on the Spelling and Grammar dialog.

Ensure your user information is correct

Because Word 97's revision features mark your changes and comments with the name or initials stored in User Information, you'll want to ensure that your name and initials appear there. To do this, click **Options** on the **Tools** menu and choose the **User Information** tab on the Options dialog. If anything on this page is incorrect, delete it and type the correct information.

Control Word's AutoCorrect functions

Some of Word's AutoCorrect functions I find very useful; others cause more trouble than they're worth.

1. On the **Tools** menu, click **AutoCorrect**. The AutoCorrect dialog has four tabs:

AutoCorrect

The AutoCorrect tab contains many useful functions; select the ones that suit the way you work. I recommend you go through the auto-replace list to look for things that you don't want to be changed automatically and delete them. For example, I deleted the one that replaces (c) with the Copyright symbol ©, because I use (a), (b), (c) a lot and having to override the change was extremely annoying.

AutoText

The entries on the **AutoText** tab are a very handy. See "Using AutoText fields to hold information that changes" on page 76 for more information.

AutoFormat and **AutoFormat As You Type**

The **AutoFormat** and **AutoFormat As You Type** tabs include several things that I dislike (but others find useful). The difference is that the **AutoFormat** tab settings are applied when you open a document, or when you go to the **Format** menu and click **AutoFormat**, not while you are typing.

I deselect all the items in the **Apply** (or **Apply as you type**) section, for example, because I don't want Word to automatically format my numbered or bulleted lists. I prefer to explicitly tell Word when to make something into a list item. Word's internal logic often causes it to do things differently from what I want, and these autoformatting functions contribute to many of the problems that people have with numbered lists. (See also "Fix or avoid list numbering problems in Word 97" on page 82.)

Word 6/95 **AutoText** is a dialog of its own, reached from the **Edit** menu.

AutoFormat and **AutoFormat As You Type** are on a tab of the Options dialog, not on the AutoCorrect dialog.

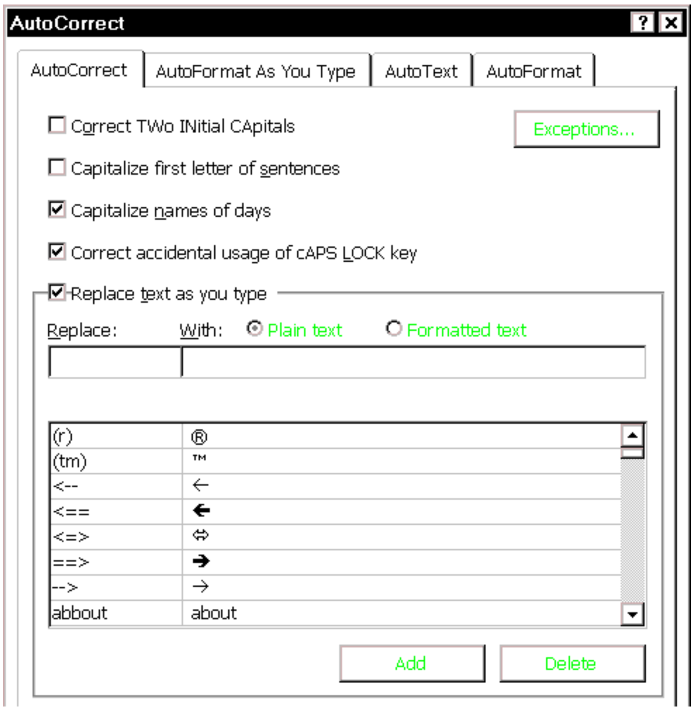


Figure 10. Choosing AutoCorrect options

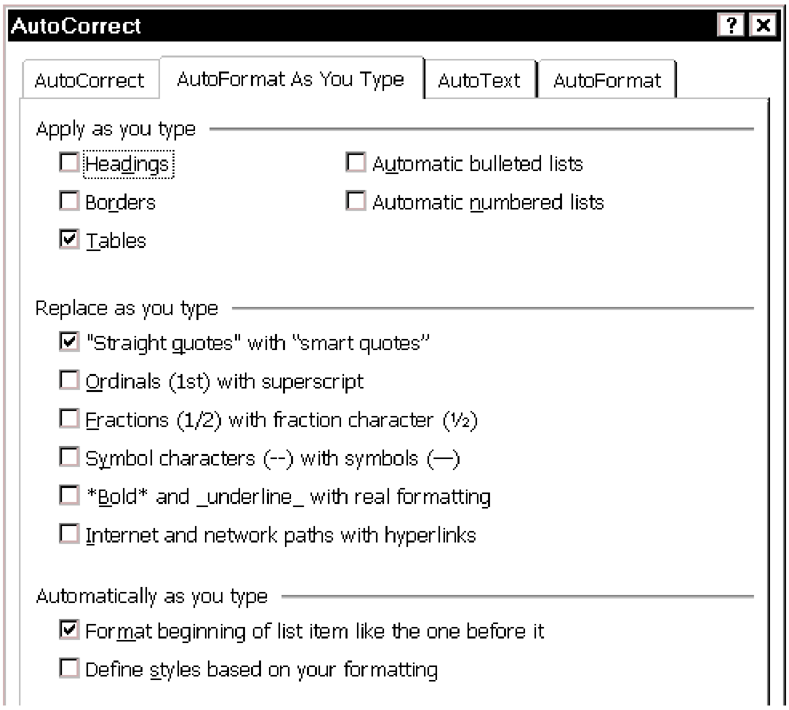


Figure 11. Choosing AutoFormat As You Type options

Add a toolbar button for an easier-to-use style list (Word 97)

The style list provided with Word 97 shows what the fonts look like and gives some information about the styles. This list can be helpful, but if the writer has created custom styles, they don't appear in alphabetical order along with the supplied styles. Finding what you want can be frustrating. Users of earlier versions of Word will remember a different type of Style list and may want to have it back. Fortunately, you can add the old Style list to the menu bar (though you can't delete the new one, even if you want to).

1. On the **Tools** menu, click **Customize**.
2. On the Customize dialog, choose the **Commands** tab.
3. Make sure **Save in:** shows normal.dot. In the Categories list, click **Format**. In the Commands box, find the **Style...** item (the one with an icon containing two letter A's to its left, not the Style: entry with a drop-down list box to its right).
4. Drag the **Style...** item to the right of the Style drop-down list on the Formatting Toolbar and release the mouse button. The double-A icon appears on the toolbar.
5. Click **Close** to close the Customize dialog.

Word 6/95	The easy-to-use Style list is standard in Word 6/95. No changes necessary!

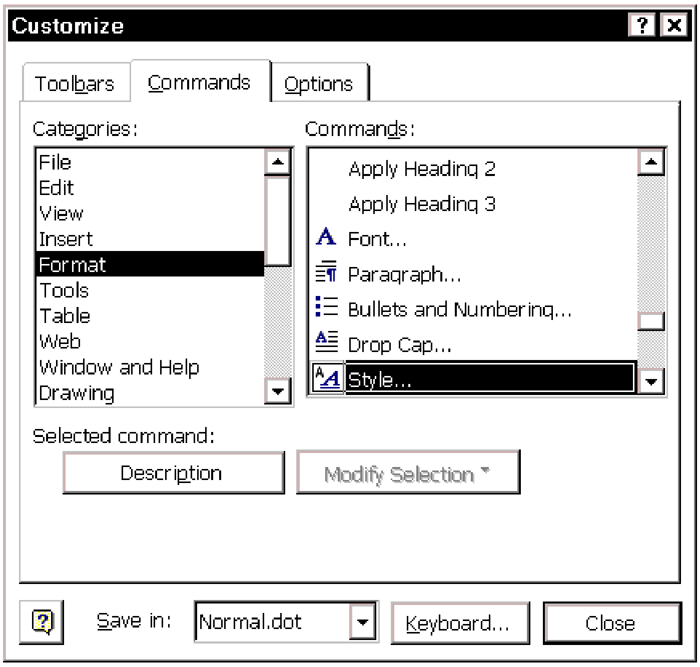


Figure 12. Choosing an easier-to-use style list

Checking spelling and grammar

Even if the writer assures you that the spelling has been checked, check it again yourself. Editors know that software won't find correctly spelled wrong words, but the spelling checker can be useful for a first cut. It's also good for finding doubled words such as "the the."

This section describes some features of Word that are useful for editors:

- Set the spelling checker to the correct version of English
- Mark some text to not be checked (for example, code or e-mail addresses)

- Recheck a document (if the spelling checker says there's nothing to check)
- Create and use a custom dictionary

Set the spelling checker to the correct version of English

"The correct version of English" usually isn't an issue if you and all the writers whose work you edit have your systems set up to default to the same version (either US or UK English). If you are in that situation, you can skip this section.

However, if you edit some documents requiring US English spelling and other documents requiring UK English, you may need to change a document from one to the other, or clean up after writers have re-used material that was originally written for the other version of English.

To change the default language for your system's spelling checker:

1. On the **Tools** menu, point to **Language**, then click **Set Language**.

Word 6/95	On the **Tools** menu, click **Language**.

2. On the Language dialog (Figure 13), highlight the required version of English on the list of languages.
3. Click the **Default** button.

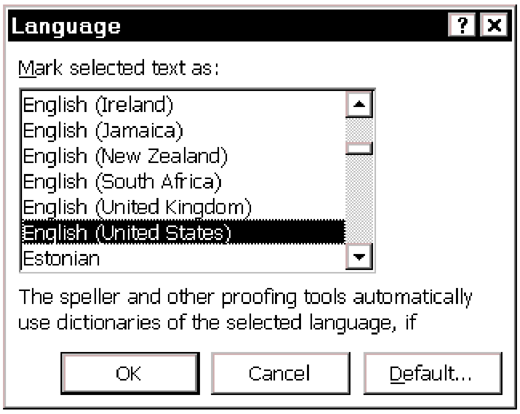


Figure 13. Choosing the required version of English

To change the language for the current document only:

1. Select all the text (**Ctrl+A**).
2. On the **Tools** menu, click **Language**, then **Set Language**.
3. On the Language dialog (Figure 13), highlight the required version of English on the list of languages.
4. Click **OK**.

Note: If you don't have a dictionary installed for the language you want (whether a version of English or some other language), then switching to a different language won't help; but most installations of an English-language version of Word should have at least the US and UK dictionaries installed.

Word 2000	The English language version of Office 2000 includes tools (spelling, grammar, hyphenation, thesaurus) for English, French and Spanish. Other languages are available on the Office 2000 Proofing Tools CD. (See your Office 2000 documentation for more information) With the correct language packs installed, Word will switch spelling and grammar checkers when you type in a different language. AutoCorrect now works correctly across multiple languages.

Mark some text to not be checked

To mark some text (for example, e-mail addresses or samples of code) in the current document to not be checked:

1. Select the relevant text.
2. On the **Tools** menu, click **Language**, then **Set Language**.
3. On the Language dialog, highlight **(no proofing)** on the list of languages.
4. Click **OK**.

Better still, define the language as "no proofing" in the style definition for those paragraphs. On the **Format** menu, click **Style**, select the style, then click **Modify**, **Format**, **Language**.

Recheck a document

After you run the spelling checker over a document, if you want to check it again, Word doesn't check the same material twice; it only checks new or changed material. This can be quite helpful with long documents, by saving time, but if you do want to check everything again, you'll need to do this:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click the **Recheck Document** button. (This selection causes both spelling and grammar to be rechecked.)
3. At the message asking if you're sure you want to do this, click **OK**.

Create and use a custom dictionary

Many writing projects include large numbers of terms that are not in the supplied dictionaries. Technical terms and product names are the most common. To make sure they are spelled correctly, you can do one of these things:

- The first time the spelling checker encounters the term in a document, click the **Ignore All** button. It will then skip all other instances of the word.
- If you routinely edit highly specialist material (for example, medical or legal documents), you may wish to purchase a supplemental dictionary. For information about purchasing such supplemental dictionaries, contact your local Microsoft subsidiary or check Alki Software Corporation's Web site (see "Finding more information").
- If the word is one that appears in several documents that you edit, you may wish to add it to a custom dictionary. Word comes with a default custom dictionary called CUSTOM.DIC. You can create as many other custom dictionaries as you need. You may want separate custom dictionaries for different clients, or for different projects, or because you have too many words to fit into one dictionary.

To select a custom dictionary to use with a document:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click **Dictionaries**.

Word 6/95	On the **Spelling** tab, click **Custom Dictionaries**.

3. In the Custom dictionaries box, select the checkbox next to each dictionary you want to use (Microsoft calls this "activating" them). You can activate up to 10 custom dictionaries at a time.
4. Click **OK**.

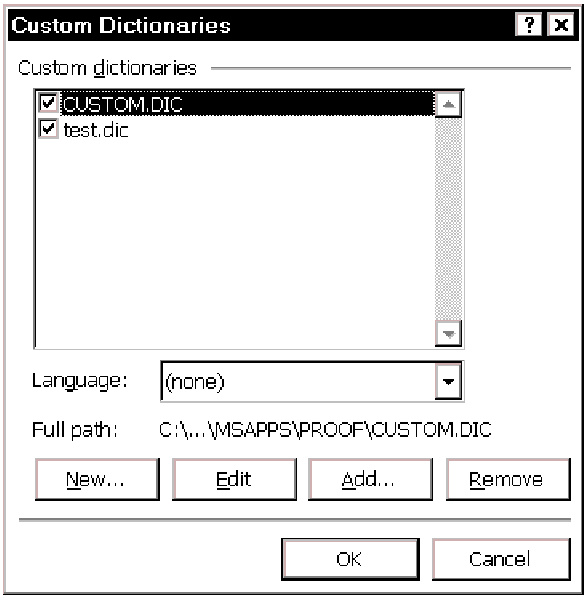


Figure 14. Activating a custom dictionary

If a custom dictionary you want to activate isn't in the Custom dictionaries box, but you know it exists, it is probably stored in a different folder from your proofing tools folder. If you want to use a custom dictionary that's stored in any other location, you need to add the dictionary to the list in the Custom dictionaries box. To do this:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click the **Dictionaries** button.
3. On the Custom Dictionaries dialog, click **Add**.
4. On the Add Custom Dictionary dialog, type the path and name of the custom dictionary you want to add, or browse for the file in the usual way. Click **OK**.
5. Back on the Custom Dictionaries dialog, make sure the checkbox for the added dictionary is selected, then click **OK**.

To create a new custom dictionary:

1. On the **Tools** menu, click **Options**.
2. On the **Spelling & Grammar** tab, click the **Dictionaries** button.
3. Click the **New** button.
4. On the Create Custom Dictionary dialog, type a name for your new dictionary, then click **OK**.
5. Back on the Custom Dictionaries dialog, make sure the checkbox for the added dictionary is selected, then click **OK**.

You can add words to a custom dictionary in two ways:

- Open the dictionary (click **Edit** on the Custom Dictionaries dialog) and type or paste the words, one to a line.
- While checking spelling, click **Add** on the Spelling and Grammar dialog when a correctly spelled word is highlighted in the **Not in Dictionary** box.

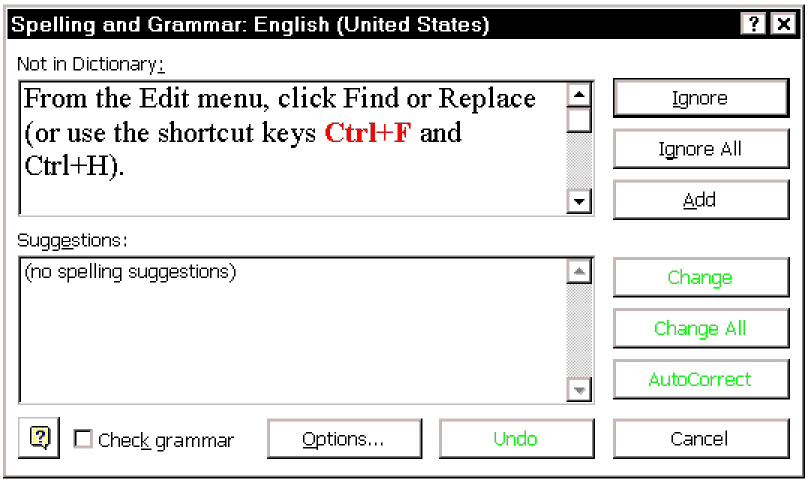


Figure 15. Adding a word to the dictionary while checking spelling

Finding and replacing text

Many people never learn how to use the advanced features of Find and Replace, but even the simplest search can make editing faster and easier.

1. On the Edit menu, click **Find** or **Replace** (or use the shortcut keys **Ctrl+F** and **Ctrl+H**).
2. On either the **Find** tab or the **Replace** tab, click the More button to display the long version of the dialog.

Using the choices in the lower half of the dialog, you can:

- Search for and replace specific formatting and special items such as paragraph marks, fields, or graphics
- Use wildcards to fine-tune a search

Replace specific formatting

One handy use for replacing formatting includes finding underlined words and replacing them with italics; I'm sure you can find many other uses.

On the Find and Replace dialog (Figure 16):

1. To search for text with specific formatting, enter the text in the **Find what** box. To search for specific formatting only, delete any text in the **Find what** box.
2. Click **Format**, and then choose the formats you want from the list.
3. To replace text, enter the replacement text in the **Replace with** box.

   To remove text, delete any text in the **Replace with** box.

   To remove the specified character formatting, click **Format**, select **Font**, then select the opposite format (for example, **Not Bold** or **No Underline**).
4. Click **Find Next**, **Replace**, or **Replace All**.

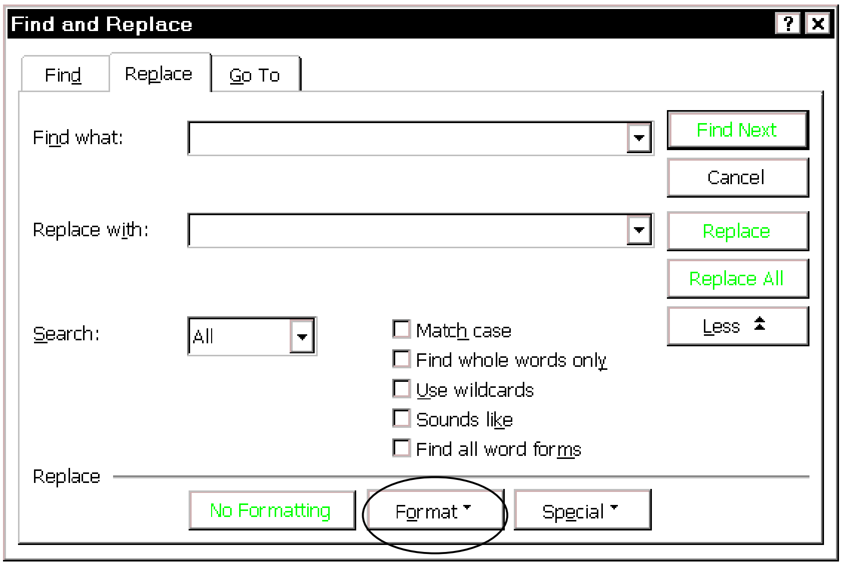


Figure 16. Finding and replacing specific formatting

Find and replace paragraph marks, page breaks, and other items

A common use for this function is to replace two paragraph marks with one, when a writer has pressed Enter twice between paragraphs (you, of course, are going to define a style that puts in any necessary extra space between paragraphs; see "Applying and changing paragraph and character styles" on page 74).

On the Find and Replace dialog:

1. Click once in the **Find what** box, then click **Special**.
2. Choose the item you want from the pop-up list.

   You can also type a code for the item directly in the **Find what** box.
3. If you want to replace the item, click once in the **Replace with** box (or press **Tab** to move from the **Find** box). Enter what you want to use as a replacement in the **Replace with** box. To use another special item, click **Special** and follow the instructions in step 2.
4. Click **Find Next**, **Replace**, or **All**.

For a quick way to find items such as graphics or comments:

1. On the Find and Replace dialog, select the **Go To** tab, then click the item you want in the **Go to what** box.

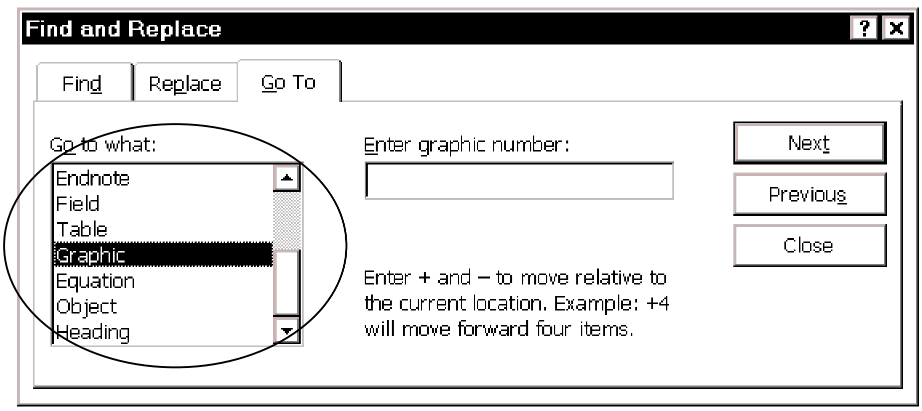


Figure 17. Finding items quickly using Go To

2. You can click **Next** or **Previous** to find the next or previous item of the same type, or type a number in the **Enter (object) number** box if you know the sequence number of the table, graphic, bookmark or other object you are searching for.

Use wildcards

Once you get used to wildcards, you'll wonder how you ever did without them. Most people are comfortable with some of the simpler constructions but find the more complex ones a bit daunting. I can only suggest that a bit of practice will pay off well in time saved later.

To use wildcards when searching and replacing:

1. On the Find and Replace dialog, select the **Use wildcards** checkbox (you may need to click the More button to see the checkbox).
2. Click **Special**, then click a wildcard from the Special list (which now shows wildcards in addition to some other special characters). Type any additional text (before or after the wildcard) in the **Find what** box.

   If you can remember the wildcards you need, it's much faster to type them directly into the **Find what** box.
3. Click **Find Next**, **Replace**, or **Replace All** (not recommended).

   If you're replacing text, it's a good idea to click **Replace** instead of **Replace All**; that way, you can confirm each replacement to make sure it's correct. Otherwise you're likely to end up with some hilarious (and highly embarrassing) bloopers.

Table 3. Examples of search wildcards

To find	Use this wildcard	Examples
Any single character	?	b?d finds "bad," "bud," "bid" and "bed."
Any string of characters	*	b*d finds "bad," "brand" and "board."
One of the specified characters	[ ]	b[iu]n finds "bin" and "bun."
Any single character in this range	[-]	[r-t]eed finds "reed," "seed" and "teed." Ranges must be in ascending order.
Any single character except the characters inside the brackets	[!]	p[!a]st finds "post" and "pest," but not "past."
Any single character except characters in the range inside the brackets	[!x-z]	b[!a-m]ck finds "bock" and "buck," but not "back" or "beck."
The beginning of a word	<	<(log) finds "logbook" and "logistics," but not "catalog."
The end of a word	>	(log)> finds "catalog," but not "logistics."

Notes:

1. More wildcards and their uses are described in the online help.
2. To search for a character that's defined as a wildcard, type a backslash (\) before the character. For example, search for "\?" to find a question mark.

Marking and tracking changes

If you need to keep a record of the changes you've made, you can use Word's revision marks to show where you want text, graphics, or formatting to be added, deleted, changed, or moved. Later, the writer (or the senior editor or another person) can review and accept or reject each change.

Note: another way to keep track of changes is for you to simply make your changes (after archiving the original document), then run a comparison between the two files to show the changes you made. A third way is to save versions, which are stored as part of the original file, but this can become a problem on documents of any size or complexity, especially if you save a lot of versions, because the file becomes quite large and Word slows down conspicuously. Which method you use, and whether you need to keep a record of changes, depends on your company's or client's policy.

You can use Word's revision feature to edit a document that has not been prepared for review, but you may want to ask the writer to do the preparation step before sending you the file. Again, using this technique is a matter of policy. The advantage is that the editor or reviewer can't forget to use revision marks. The disadvantage is if you change your mind about something you deleted, and you don't catch it soon enough to "undo" it, you have to type it in again, and it shows as both a deletion and an insertion. You'll have people being confused and asking "but what did you change?"

Prepare a document for editing

If you do need to prepare a document for editing, here's what to do:

1. Open the document.
2. Check whether the document contains multiple versions by clicking Versions on the File menu.

   If multiple versions exist, save the current version as a separate document with a different name, and use this copy as the review copy.
3. On the **Tools** menu, click **Protect Document**.
4. On the Protect Document dialog (Figure 18), select what you want the reviewers to be able to do.
   - To let reviewers change the document and insert comments, and to track all changes with revision marks, select **Tracked Changes**.

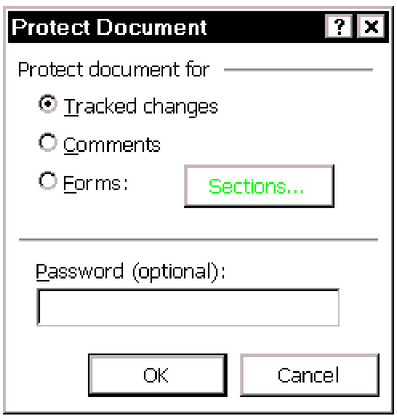


Figure 18. Setting up a document to ensure any changes are tracked

- To let reviewers insert only comments and not change the contents of the document, select **Comments**.
- To let only authorized reviewers add changes and comments, type a password. Make sure you keep a record of the password!

Edit (review) the document

1. To set up your reviewing options, on the **Tools** menu, point to **Track Changes**, then click **Highlight Changes**. Select the **Track changes while editing** checkbox.

   If you want to see your changes (not just the results of your changes) on screen, select the **Highlight changes on screen** checkbox.

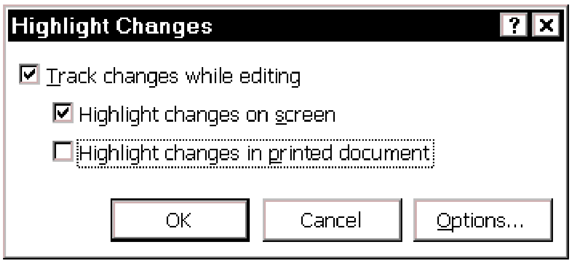


Figure 19. Specifying your reviewing options

2. To select which of your changes will be displayed, and how they will look, click **Options**. On the Track Changes dialog, you can choose colors and presentation (underline, strikethrough, italics, and so on) for inserted and deleted text, choose whether to show "change bars" in the margins (and if so, what character to use), and whether to mark formatting changes.

Word 6/95 tip Display these selections by clicking **Revisions** on the Tools menu.

---

3. To display the Reviewing toolbar (not available in Word 6 or 95), open the View menu, click **Toolbars**, then click **Reviewing**.
   - If the document has been prepared for editing, the **Track Changes** button will be "on" (gray background) and you will not be able to turn it off.
   - If the document has not been prepared for editing, be sure the Track Changes feature is turned on before you start editing. To turn on Track Changes, click the **Track Changes** button on the Reviewing toolbar.

Two things to remember:

1. Displaying changes (insertions and deletions) on screen will often change the pagination of the document, so don't regenerate the index or table of contents, or update any other fields that show page numbers, until you turn off the display of changes. To do this, go back into the Highlight Changes dialog (on the Tools menu, point to **Track Changes**, then click **Highlight Changes**) and deselect Highlight changes on screen. See "Regenerate and check the corrected index" and "Regenerate the corrected table of contents."
2. If you're going to print the document, be sure Highlight changes in printed document is not selected, unless you want all the inserts and deletions to appear.

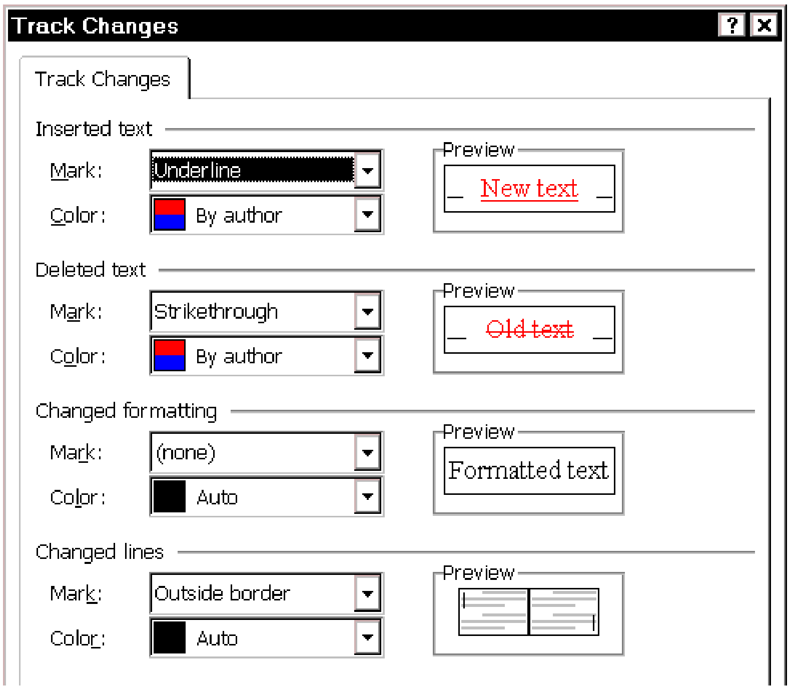


Figure 20. Choosing which of your changes will be displayed, and how they will look

Inserting comments and questions

When you insert a comment, Word numbers it and records it in a separate comment pane. You can view comments in ScreenTips or in the comment pane. You can also modify the comments you or others have made.

Word 6/95	Comments are called Annotations in Word 6/95. There is no Reviewing toolbar.

To insert a comment (annotation):

1. Select the text you want to comment on, or place the insertion point anywhere in the text.
2. On the Insert menu, click **Comment** (**Annotation** in Word 6/95), or press **Alt+Ctrl+M** on the keyboard, or (Word 97 only) click the **Insert Comment** button on the Reviewing toolbar. Your initials and a sequence number appear in the file, the comments pane opens at the bottom of the Word screen, and the spot where the comment was inserted is highlighted yellow.
3. Type your comment, then click **Close** to close the comments pane. (You can leave the comments pane open and click back in the main document to continue working; this can be faster if you're making a lot of comments.)

To edit a comment, move the mouse pointer over the comment marker until the pointer changes shape, then right-click and choose **Edit** from the popup menu (or click the **Edit Comment** button on the Reviewing toolbar) to display the comments pane.

To view a comment, you can either:

- Move the pointer over text shaded with light yellow. Word displays the comment and the name of the reviewer making the comment in a ScreenTip above the text. If comments don't appear, click **Options** on the Tools menu, click the **View** tab, and then select the **ScreenTips** checkbox.
- Click the **Edit Comment** button (on the Reviewing toolbar) to display the comments pane.

To remove a comment:

1. Rest the pointer over the highlighted text of the comment.
2. When the ScreenTip appears, press **Delete**.

Editing an index

To edit a Word index electronically, you need to edit the index entries, not the generated index. Any changes you make to a generated index will be lost when the index is generated again. However, you could copy the generated index into a separate file, edit that file, and then send it to the writer, who will then make the necessary changes to the actual index entries.

I usually print and mark up the generated index, then go searching through the document looking for index entries to change. Here's a situation where the Find and Replace function comes in extremely handy. Word's index entries are formatted as hidden text, so you can specify hidden text to narrow your search to index entries only (unless the document has other text formatted hidden).

This is what an index entry looks like:

```
{ XE "sample index entry" }
```

Edit an index entry

1. On the **Tools** menu, click **Options**; then on the **View** tab, select the **Hidden text** checkbox. Click **OK**.
2. Press **Ctrl+H** to open the Find and Replace dialog.
3. Type (or copy and paste) the index entry text into the **Find what** box.

   (If you are looking for several instances of the same index text, you can type the replacement entry text into the Replace with box.)
4. If necessary, click **More** to display the advanced search features.
5. Click **Format** at the bottom of the dialog, then choose **Font** from the pop-up list.
6. Uncheck all the **Effects** buttons in the Find Font dialog except for **Hidden**. Click **OK**.
7. On the Find and Replace dialog, click **Find Next**. When the entry is located, click either **Replace** (if you've put text into the **Replace with** box), **Find Next** (to skip that instance of the index entry) or **Cancel**.

   You can also edit an index entry by locating it (as described above), then clicking outside the dialog and editing the entry text directly in the document. Just be careful not to delete the `{ XE "` at the beginning of the entry or the `" }` at the end.
8. To delete the entry completely, you need to click outside the dialog, select the entire entry (including the curly brackets at the beginning and the end) and press **Delete**.
9. Repeat with new "Find what" and "Replace with" terms, until you have made all the necessary corrections.

Regenerate and check the corrected index

1. First turn off the display of hidden text. (On the **Tools** menu, click **Options**, then choose the View tab; or click the Show/Hide button on the Standard toolbar.) This step is very important, if you want the page numbers in the regenerated index to be correct.
2. Position the insertion point anywhere in the existing index and press **F9**. (You can also select the whole file and press F9 to update all cross-references, figure and table numbers, and the table of contents at the same time as you regenerate the index.)

Editing a table of contents

Word tables of contents are usually generated from text formatted as headings (or other styles specified by the writer) in the document. Therefore you need to edit the headings, not the generated contents list.

- If the page numbers in the existing table of contents are hyperlinks (move the pointer over a page number and see if the arrow changes to a hand), you can jump directly to the heading you want to change.
- If the page numbers are not hyperlinks, you can use Find to locate a heading, by specifying the text and choosing **Style** on the **Format** menu, then choosing the relevant heading level from the Find Style list.

Regenerate the corrected table of contents

After you edit the headings, you'll want to regenerate and check the corrected table of contents:

1. Make sure the display of hidden text is turned off. This step is very important, if you want the page numbers in the regenerated table of contents to be correct.
2. Position the insertion point anywhere in the existing table of contents and press F9. (You can also select the whole file and press **F9** to update all cross-references, figure and table numbers, and the index at the same time as you regenerate the index.)

Number chapters and appendixes separately

What to do if some of the headings need to be numbered (for example, Chapter 1, Chapter 2) and others at the same level need some other designation (for example, Appendix A, Appendix B)? Here's one way. (Another method uses {SEQ} fields; see "Number chapters and appendixes separately" on page 87.)

Note: If you use the method described here, the Appendix headings do not appear in the list of headings available for automatic cross-references. However, in Word 97 the Appendix headings do appear in the list of Numbered Items for cross-references.

1. If necessary, modify the Heading 1 style to include chapter numbers:
   a. On the **Format** menu, click **Style**, then click **Modify**. On the Modify Style dialog, click **Format**, then choose **Numbering** from the popup list. On the Bullets and Numbering dialog (Figure 21), choose the **Outline Numbered** tab.

Word 6/95	When you modify the numbering of a built-in heading style, a Heading Numbering dialog is displayed, instead of the Bullets and Numbering dialog.

b. Choose an appropriate numbering style. If you want "Chapter 1" but none of the styles shown include the word "Chapter," select the style with numbering the way you want, then click the **Customize** button.

c. On the Customize Outline Numbered List dialog (Figure 22), type Chapter (followed by a space) before the number shown in the **Number format** box. (**Note:** If you make an error, use the Backspace key to remove any text you entered and then want to change; the Delete key doesn't work in this field.)

d. Click **OK** twice to return to the Style dialog.

2. Create a new style (say, Appendix 1) based on Heading 1:

   a. On the **Format** menu, click **Style**, then click **New**.

   b. Type a name for the new style. In the **Style type** box, select **Paragraph**. In the **Based on** box, select Heading 1. Select the **Add to template** checkbox. Clear the **Automatic update** checkbox.

   c. Click **Format**, then select **Numbering** from the pop-up menu. On the Bullets and Numbering dialog, click the **Outline Numbered** tab.

   d. Choose the format you just created (Chapter) and click **Customize**.

   e. On the Customize Outline Numbered List dialog, change "Chapter" to "Appendix" in the **Number format** box. Change **Number style** to A, B, C.

   f. Click **OK** twice to return to the New Style dialog. Click **OK**.

3. Tag your first-level headings appropriately. If your first Appendix isn't A:

   a. Right-click on the first Appendix heading and choose **Bullets and Numbering**.

   b. Select **Restart Numbering**, click **OK**.

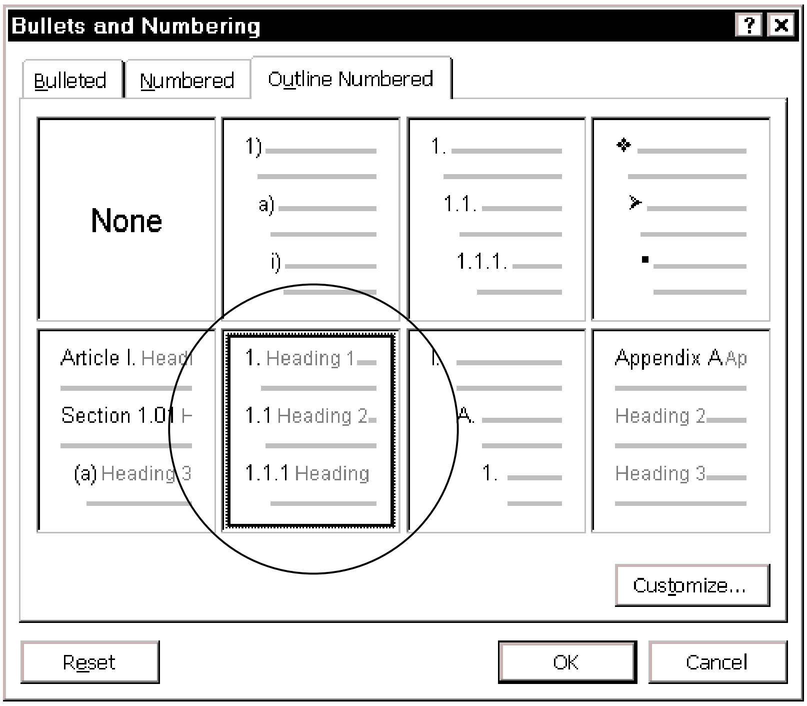


Figure 21. Selecting an appropriate outline numbering style

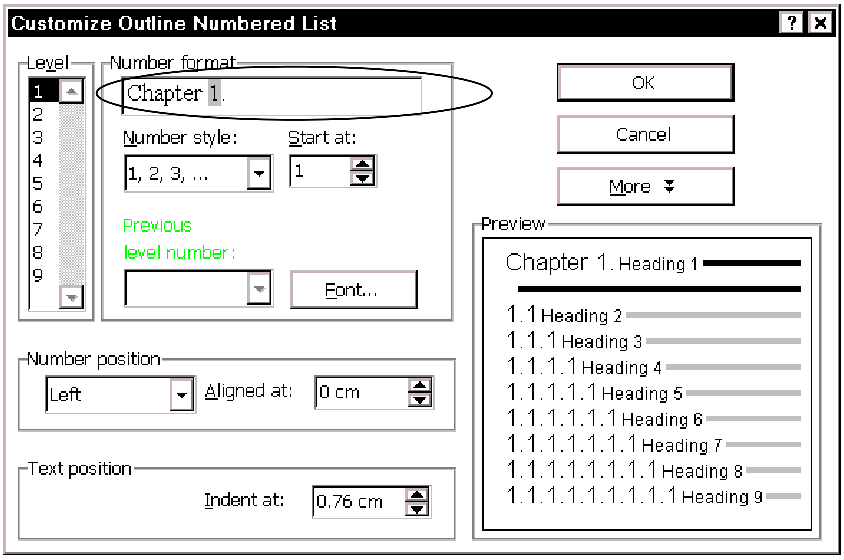


Figure 22. Typing Chapter before the number shown in the Number format box

To include the new style in the Table of Contents:

1. On the **Insert** menu, click **Index and Tables**.
2. On the **Table of Contents** tab, select the required TOC style in the **Formats** box, then click **Options**.
3. On the Table of Contents Options dialog (Figure 23), select the **Styles** box under **Build table of contents from**.
4. In the list of Available styles, find Appendix 1 and type a 1 in the TOC level box. (Heading 1 should already be specified at TOC level 1.) Click OK.

Now when you generate or regenerate the Table of Contents, the appendixes will appear at the same level as the chapter headings.

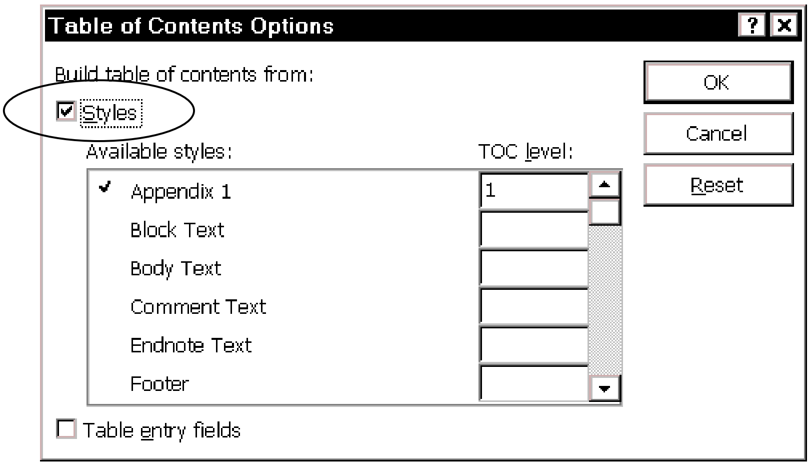


Figure 23. Specifying a new style as a Table of Contents level 1 entry

Changing page layouts

To change paper size, margins, and some aspects of layout, on the **File** menu, click **Page Setup**.

Be careful what's showing in the **Apply to** box: if your document has more than one section, this setting defaults to "This section," which can cause serious disruption of the document if that's not what you intended.

Create a new section

If you want to have different settings for different parts of a document (for example, some portrait pages and some landscape pages, or single column and double column layouts), you need to have the different parts in different sections. You can do this in two ways:

- On the **Layout** tab of the Page Setup dialog (Figure 24), choose the settings and then choose **This point forward** in the **Apply to** box; Word will insert a section break at the insertion point location. Be careful! If the insertion point is in the middle of a paragraph, that's where the section break will occur.

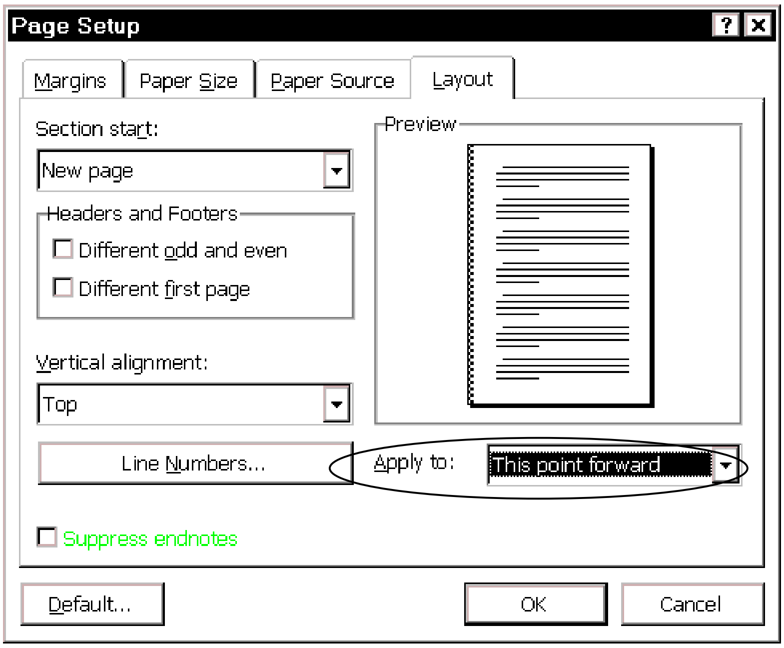


Figure 24. Starting a new section using the Page Setup dialog

- Insert the section breaks in the file (on the **Insert** menu, click **Break** and choose the required type of section break on the Break dialog (Figure 25), then open the Page Setup dialog and choose settings for **This section only**. This is the recommended technique.

  Consult the online help for explanations of the available **Section breaks** choices.

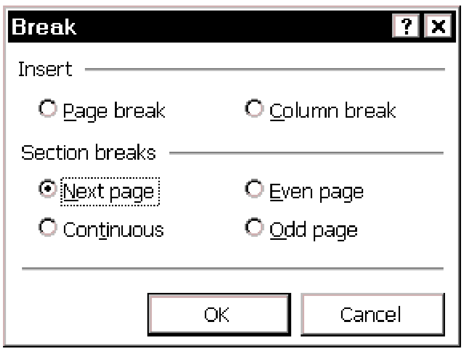


Figure 25. Starting a new section using the Break dialog

Change page margins

Page margins are the area between the edge of the paper (defined on the Paper Size tab of the Page Setup dialog) and the text area. If you must use a specific width for the text area, you'll need to make some calculations to determine how wide to set the margins.

1. On the **File** menu, click **Page Setup**, make sure the correct paper size is selected on the **Paper Size** tab, then select the **Margins** tab.

   Some definitions:

   - The Gutter area is added to the binding edge of the page. For a single-sided layout, the gutter is always on the left. For a double-sided layout, select the Mirror margins checkbox; the gutter is now on the left of right-hand pages and on the right of left-hand pages. If you don't want a wider margin on the binding edge, you can change the gutter size to zero.
   - The Header and Footer margins are measured from the top and bottom of the page, respectively. You must make sure that the Top and Bottom margins are larger than the Header and Footer margins.

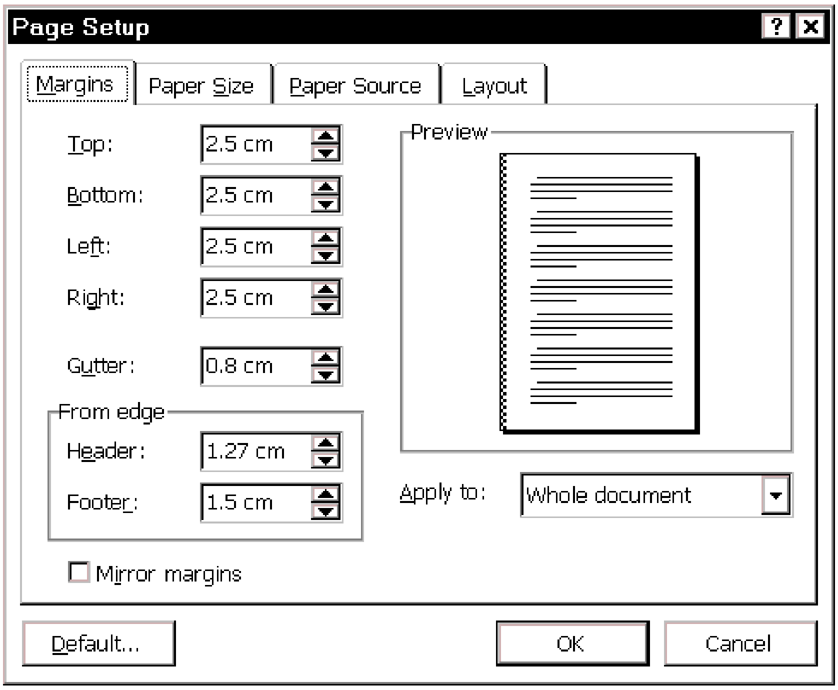


Figure 26. Changing page margins

2. Specify the margins, then make sure the **Apply to** box shows what you want.

   Usually you want your changes to apply to the whole document, but you might, for example, want to change the margins on a landscape section of your document, to make a wider top or bottom margin (to allow for a binding edge when a landscape page is bound in with portrait pages). See "Create a new section".

   Note: If you start a new section on the same page as a previous section, this technique won't work, because page margins apply to a whole page. You can create the same effect by using frames or paragraph styles, but unless you're trying to put together a complicated layout such as a newsletter, you're better off starting sections on a new page. (And if you are responsible for the layout of something complicated, you need to learn a lot more Word layout tricks than I can cover in this book.)

Editing headers and footers

To edit headers and footers: on the **View** menu, click **Header and Footer**, or simply double-click in the header or footer area of the page. The Header and Footer toolbar appears.

To specify different headers and footers on odd and even pages, or on the first page of a section:

1. On the **File** menu, click **Page Setup**. (Or click the **Page Setup** icon on the Header and Footer toolbar.)
2. On the **Layout** tab of Page Setup dialog (Figure 27), select the appropriate checkboxes. Be sure the **Apply To** box shows **Whole document** or **This section** (if you want to change footers in a new section). Click **OK**.

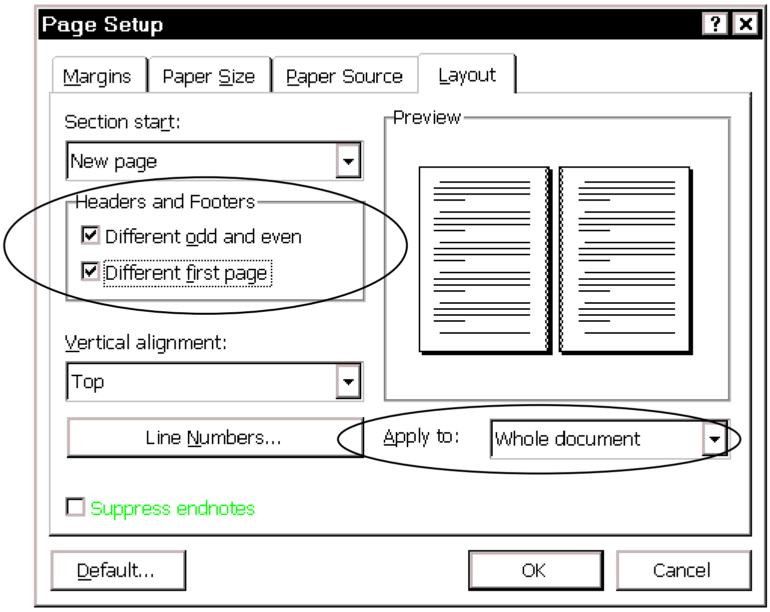


Figure 27. Specifying different headers and footers for first, odd and even pages

The left and right margins of the headers and footers are the same as the left and right margins of the page they are on. You can define the paragraph style of the header or footer to make its margins inside or outside the page margins, just as you can define the margins of any paragraph style.

You can type in the header or footer areas, or insert cross-references or other fields to include information such as the chapter title, the date, the author, and so on. To insert a page number, click the **Page Number** icon on the Header and Footer toolbar. See "Using fields in headers and footers" on page 92 for more information.

Editing footnotes and endnotes

You can edit footnotes and endnotes in Word without doing anything special.

However, if you want to delete a footnote completely, be sure to delete the footnote marker (number or symbol) in the body of the document, not the footnote text, or you will still have the footnote marker in the doc body, and the line at the bottom of the page, but no footnote text. When you delete the marker, the footnote text is automatically deleted as well.

A handy trick for editors: If you want to change the footnote markers (for example, from a number series to a series of symbols):

1. On the **Insert** menu, click **Footnote**. On the Footnote and Endnote dialog (Figure 28), click **Options**.

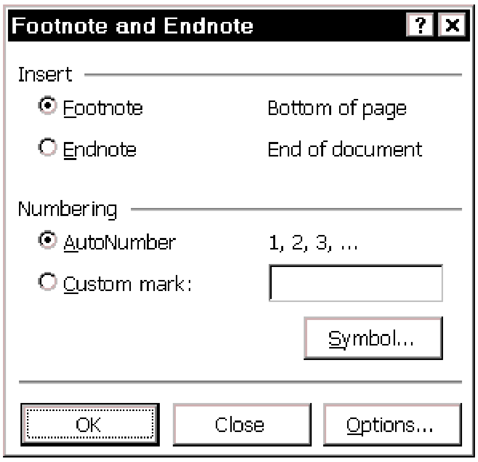


Figure 28. Using the Footnote and Endnote dialog

2. On the Note Options dialog (Figure 29),where your choice affects all footnotes in the document, choose the number format, then click **OK**.

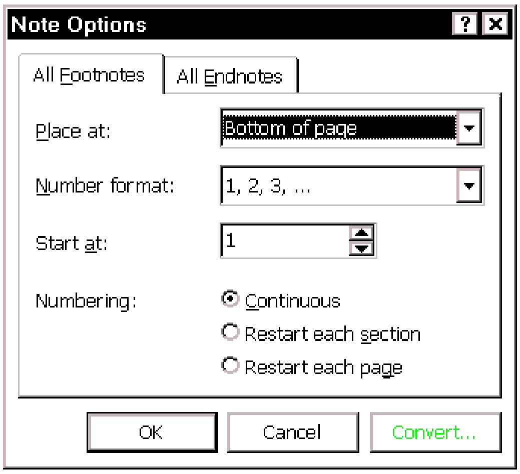


Figure 29. Changing the number format for footnotes

3. Back on the Footnote and Endnote dialog (Figure 28), click **Close**. The number format will change for all existing footnotes, but you won't insert a new footnote. (If you clicked **OK** here, you would also insert a new footnote.)

Change footnotes to endnotes

1. On the **Insert** menu, click **Footnote**, then click the **Options** button.
2. On the Note Options dialog, click **Convert**.
3. On the Convert Notes dialog, select the option you want, then click **OK**.

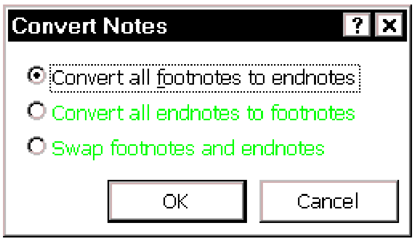


Figure 30. Changing footnotes to endnotes

Changing table layouts

Word's tables can serve several purposes:

- To present tables of data, similar to those you might see in a spreadsheet (sometimes these tables are imported from Excel or another spreadsheet)
- To line up material that might otherwise be lined up using tabs
- To position various page elements in columns, or line up graphics in the margin with text in indented paragraphs

In each case, you may need to change what the writer has produced. For example:

- Word's default table layout is page width, with the columns in the table of equal width. The writer may not have adjusted these to the best fit for the data in the columns.
- Some tables may extend into one or both margins. This often happens when the data has been imported from another program.
- The style guide for the document may prescribe a table layout style that the writer has not applied consistently.

This section provides some tips for changing table layouts quickly:

- Fit table to page margins
- Adjust column widths
- Adjust row heights
- Remove vertical or horizontal gridlines

Fit a table to the page margins

When fitting a too-wide (or too narrow) table to the page width:

1. Decide whether you want the columns in the table to be of equal width, or you want to adjust the columns to better fit the data.
2. Select the entire table (place the insertion point anywhere in the table; on the Table menu, click Select Table—or use the keyboard shortcut ALT+5 on the numeric keypad (with NumLock off).
3. On the **Table** menu, click **Cell Height and Width**.
4. In the Cell Height and Width dialog, select the **Column** tab.
5. Do one of the following:
    - To make all columns equal width:
        a. In the **Width of column** box, type **A** and click on the down arrow so the box shows **Auto**.

b. If you wish to change the **Space Between Columns**, you can do so now.

c. Click **OK**.

- To make columns fit the data:

a. Leave the **Width of column** box blank. You can change the **Space between columns** if you wish.

b. Click **AutoFit**.

c. You'll probably want to adjust some of the column widths after doing this.

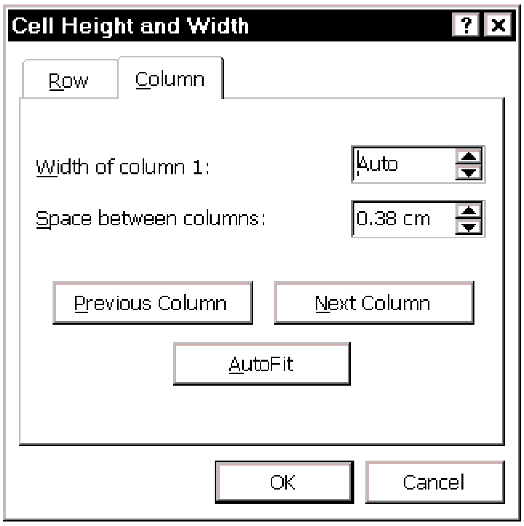


Figure 31. Specifying the size of a column in a table

Adjust column widths

You can adjust the width of individual columns in several ways:

- Using the **Distribute Columns Evenly** choice on the **Table** menu, if you want all the columns to be the same width
- Using the **Cell Height and Width** dialog
- Using the mouse to drag column margins

To use the Cell Height and Width dialog:

1. Select the column you want to adjust, not the entire table. To do this, position the pointer just above the top of the column you want to adjust; the pointer will turn into a down-arrow (🡇). Click to select (highlight) the column.
2. On the **Table** menu, click **Cell Height and Width**.
3. Adjust the **Width of column** as required. You can also change the **Space between columns** if you wish.
4. If you want to change the width of another column, click the **Next Column** or **Previous Column** button until the required column is displayed.
5. Repeat steps 3 and 4 until you have finished adjusting column widths.
6. Click **OK**.

To use the mouse to drag column margins:

1. Display the horizontal ruler, if it is not already visible at the top of the document.
2. Select the table.
3. Position the pointer over one of the markers on the ruler, until the pointer turns into a double-headed arrow (↔). Hold down the left mouse button and drag the marker to the required location. All cells to the right resize proportionally.

   To resize only the first cell to the right, hold down the Shift key while you drag the marker.

   To make all cells to the right resize to an equal width, hold down the Ctrl key while you drag the marker.

Note: This technique moves column margins in increments defined by the setting for drawing gridlines. If you need a finer adjustment, you can either change the gridlines setting or use the Cell Height and Width dialog.

To change the gridlines setting:

1. Display the Drawing toolbar.
2. On the Drawing toolbar, click **Draw**, then click **Grid**.

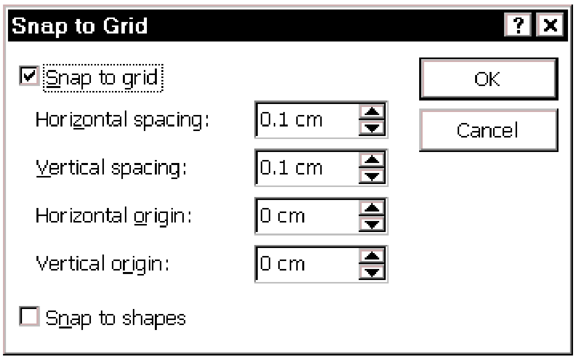


Figure 32. Specifying the grid spacing for tables and drawings

3. On the Snap to Grid dialog (Figure 32), you can deselect the **Snap to grid** checkbox, or change the horizontal spacing.

   Remember that anything you change here will not affect existing tables or drawings, but it will affect anything using gridlines that you create or adjust in the future, so you may want to return to this box and change the settings back after you've finished fixing the tables.

4. Click **OK**.

Adjust row heights

You can adjust the height of the row in several ways:

- Using the Cell Height and Width dialog
- Using the mouse to drag the row height up or down
- Using paragraph styles to adjust the space before and after the text in the row

The first two methods can increase the space after the text, but won't affect the space before.

If you need to adjust the space before as well as after the text in a row, use paragraph styles (see "Applying and changing paragraph and character styles" on page 109 for more information).

Remove vertical or horizontal gridlines

By default, Word creates tables with visible horizontal and vertical gridlines. In some cases (for example, spreadsheet-like tables), this may be what you want. In other cases, you may want only vertical lines, or only horizontal lines, or no lines at all.

I haven't found any way to make a different table layout the default. When I'm creating a table with no data (intending to type the data in afterwards), I copy a blank, formatted table from my collection of stock tables. When I'm editing an existing table, or creating a table out of existing text, or importing a table from a spreadsheet, then I have to apply the required table formatting afterwards. Fortunately, this isn't difficult, though if you have a lot of tables, it can be time-consuming.

To remove all gridlines from a table:

1. Select the table.
2. On the **Table** menu, click **Table AutoFormat**.
3. On the Table AutoFormat dialog (Figure 33), choose **(none)** in the **Formats** list and click **OK**.

To remove vertical gridlines and keep the horizontals, follow the procedure above, but choose one of the other AutoFormats. I find **List 3**, with the **Color** checkbox deselected, useful.

To remove horizontal gridlines and keep the verticals, you'll need to use **Borders and Shading** on the **Format** menu. Start with an AutoFormat that's close to what you want and amend it. This can get a bit complicated, so I won't go into the details here.

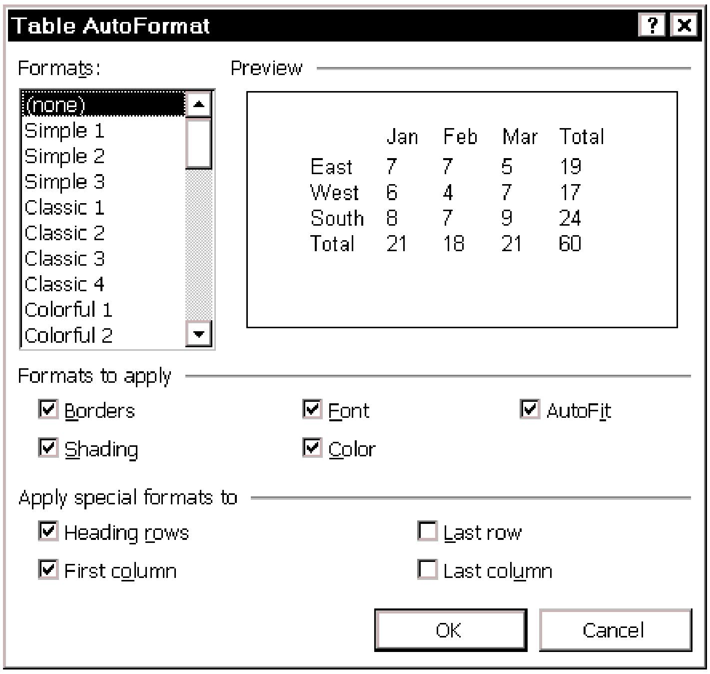


Figure 33. Removing all gridlines (cell borders) from a table

Change tabbed text into a table

If a writer has used tabs to put text into columns, and particularly if some lines have more than one tab between columns (because the writer used default tab stops instead of defining them explicitly), the formatting can go seriously wrong if something else is changed, for example the typeface, type size, or line length.

To change tabbed text into a table:

1. Be sure tabs and paragraph marks are visible (see "Display paragraph marks, tabs, text boundaries and other items" on page 35).
2. Remove any extra tabs; you want only one between each pair of columns. (This may temporarily make the columns not line up.)

   You can speed up this process by using Replace to find two tab characters and replace them with one (see "Find and replace paragraph marks, page breaks, and other items" on page 46).
3. Select all the tabbed text, including the paragraph markers.
4. On the **Table** menu, click **Convert Text to Table**.
5. On the Convert Text to Table dialog, select **Tabs** in the **Separate Text At** group.

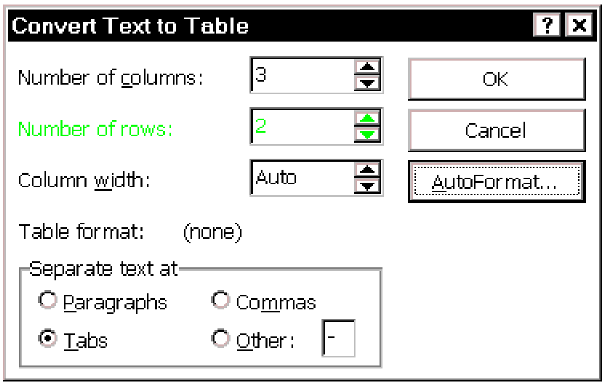


Figure 34. Converting selected text to a table

6. Click **AutoFormat**. On the Table AutoFormat dialog (Figure 33), choose whatever you want in the Formats box, then click **OK**.
7. Back on the Convert Text to Table dialog, click **OK**.

Using automatic cross-references

If your writers have typed in references to other parts of the document, those references can easily get out-of-date if you reword a heading, add or remove figures, or reorganize sections. Replace any typed cross-references with Word's automatic ones and, when you update fields, all the references will update automatically. (If you're making cross-references to other files, this can get a bit messy; I'm not going to attempt a full discussion on how to handle that situation.)

Ordinary cross-references within one file are easy:

1. Place the insertion point where you want the cross-reference to appear.
2. On the **Insert** menu, click **Cross-reference**.
3. On the Cross-reference dialog, select the reference type (Heading is commonly used), and what you want the reference to show (for example, the heading text or the page number).

Select or deselect the **Insert as hyperlink** checkbox, as you prefer; choose the heading or other item from the **For which heading** box; then click **Insert**.

The dialog stays open, so if you want to insert several cross references, you can do so. You can click outside the dialog to return to the main document. When you are finished, click **Close** (**Cancel** turns to **Close** after you have inserted a cross-reference).

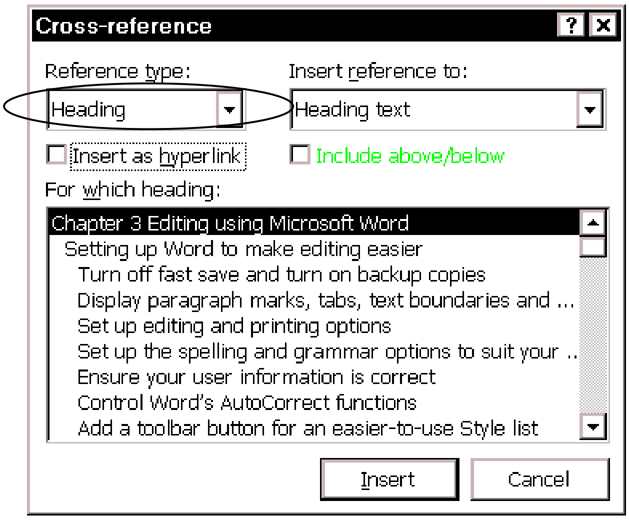


Figure 35. Selecting a heading cross-reference

Editing or annotating graphics, photographs and screen captures

Word has some quite useful graphics tools and ways to handle figure captions, but it also has some quirks that will annoy you unless you know how to deal with them.

This section discusses the following topics:

- Turn off float over text (Word 97)
- Number captions sequentially
- Keep the caption with the picture
- Edit graphics
- Crop graphics
- Annotate graphics

See also "Starting caption numbering at 2 or more" on page 80 and "Preventing the big red X in Word 97" on page 95.

Turn off float over text (Word 97)

Although Word's Float over Text setting for pictures can be useful in some situations (for example, in newsletters where you might want to place a picture precisely on a page and have the text wrap around it), in other situations this feature causes more problems than it solves.

If you want your pictures to remain in a particular sequence in the text (for example, a screen shot in a step of a procedure, or a little graphic in a sentence), rather than a specific place on the page (for example, in the upper right-hand corner), you do not want to use Float over Text. You want the picture to be "inline"—that is, to act like text in a paragraph. The picture could be in a paragraph of its own, in a table cell, or inserted like a character in a sentence (little pictures of icons are often done this way).

Word 6/95	Pictures are inline; to "float" them you must put them into a frame.
Word 2000	Inline is the default, but you can choose to "float" a picture if you want to.

To change a floating picture to an inline picture:

1. Click on the picture.
2. On the **Format** menu, click **Picture**, then choose the **Position** tab.
3. On the Format Picture dialog (Figure 36), deselect the **Float over text** checkbox, then click **OK**.

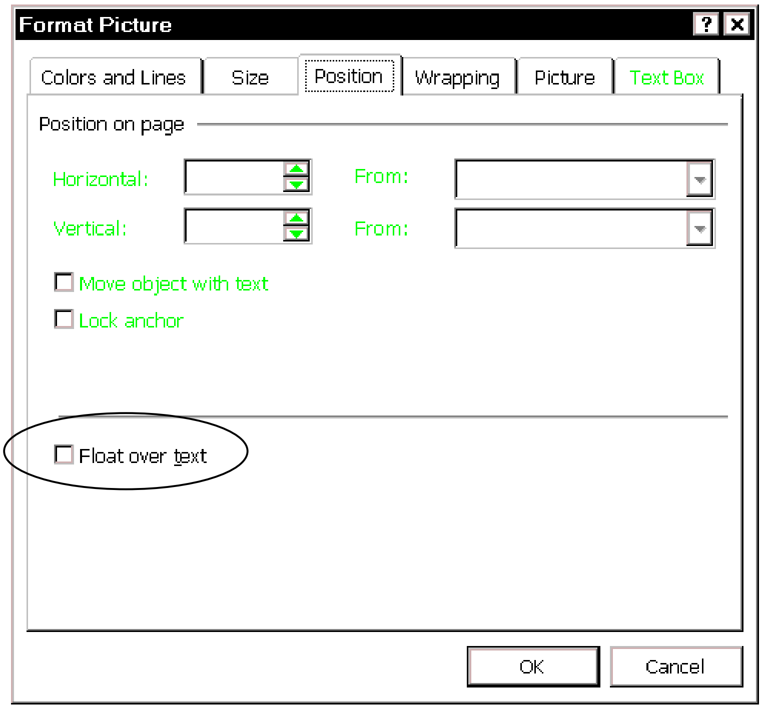


Figure 36. Turning off "float over text"

Number captions sequentially

If you want figure captions numbered sequentially, make sure they are created using Word's caption function:

1. On the **Insert** menu, click **Caption** and choose **Figure** from the Label list.
2. Type the caption contents after the automatic caption label and number that appears in the **Caption** box, then click **OK**.

Notes:

1. The first figure caption in any document will be numbered 1, and each subsequent figure caption's number will be increased by 1. To start a caption with a higher number, see "Starting caption numbering at 2 or more" on page 80.
2. You can have more than one sequence of captions. The **Label** box provides three standard sequences: Figure, Table, and Equation. You can add others. Each sequence begins with 1, and they are all numbered independently of each other.

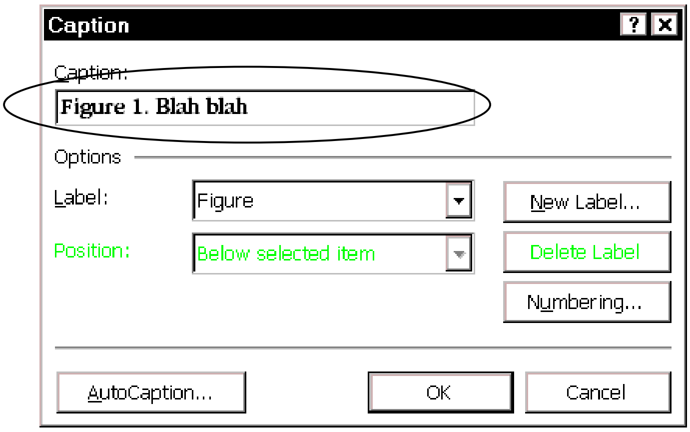


Figure 37. Using automatic figure captions

Keep the caption with the picture

If you are inserting captions (for example, changing non-automatic captions to automatic ones, here's the easiest way to keep the caption with the picture:

1. Insert the picture. Select the picture or the paragraph containing the picture.
2. On the **Insert** menu, click **Caption**.
3. On the Caption dialog, choose either **Above selected item** or **Below selected item** in the **Position** box.
4. When you click **OK**, the caption appears in the specified position. Whichever paragraph is first (the caption or the picture) is now tagged Keep with next.

Edit graphics

If graphics were produced using the Word's Drawing tools, you can edit them directly in Word. To edit other graphics, you may need to use the software that produced them (for example, PowerPoint or Visio) or you may be able to use equivalent software (for example, bitmaps, gifs or jpegs can be edited using a variety of image-editing software).

Crop graphics

To crop a graphic (cut off unwanted portions at the edges) in Word 97:

1. Select the graphic.
2. Display the Picture toolbar, if it's not visible.
3. Click the Crop tool (which looks like two X's). The mouse pointer turns into an arrow with a similar two-X shape at its tip.
4. Position the pointer over one of the handles on the edge of the picture, hold down the left mouse button, and drag the handle into the picture.

   When you release the mouse button, part of the picture is cut off, but the picture is not resized (as would happen if you dragged a handle without clicking the Crop button first).

You can specify exact measurements for cropping a graphic by clicking **Picture** on the **Format** menu and then selecting the amount of cropping you want in the **Crop From** boxes.

Word 6/95 Here's how to crop a picture in Word 6/95:

1. Select the graphic.
2. Hold down **Shift** and click a sizing handle so it becomes the cropping tool.
3. Drag the sizing handle toward the graphic.

Annotate graphics

If your job as editor is not to change the graphics directly, but to comment on them (annotate them), here's a way to use Word's drawing tools to insert those comments:

1. If necessary, display the Drawing toolbar (click the **Drawing** button on the Standard toolbar, or point to **Toolbars** on the **View** menu and select **Drawing**).
2. Click on the picture you want to annotate. (This ensures that the comment you are going to insert will be attached to the picture and will move with it if its location on the page changes.)
3. On the **Drawing** toolbar, click **AutoShapes**, point to **Callouts**, and click an appropriate style.
4. The pointer changes to a cross (+). Click and drag where you want the comment to appear (you can move it later, if necessary). Type whatever you want.

Changing document properties

Many people copy one document (often written by someone else, or for a different project) when they create another, and don't change the document properties. If you don't catch these inconsistencies, they can end up being quite embarrassing for someone.

To change document properties:

1. On the **File** menu, click **Properties**.
2. On the Properties dialog, check all the fields on the **Summary** tab, in particular **Title** and **Author**, and change anything that needs amendment. Click **OK**.

Accepting or rejecting editorial changes and comments

This step would normally be done by the writer, but if the writer is not experienced at using Word's reviewing feature, you may need to explain how to accept or reject changes and comments.

Merge documents

If more than one person reviews or edits separate copies of a document, the writer may wish to combine all of those comments and changes into one document. Word provides a way to do this, but it doesn't work quite as advertised.

Here's the theory:

1. Open the copy of the original document into which you want to merge changes.
2. On the **Tools** menu, click **Merge Documents**.
3. Locate and click one of the documents that has changes to be merged, and then click **Open**.

4. Repeat steps 2 and 3 until all copies of the document are merged.

Here's the problem:

Although insertions and deletions are marked correctly, using different colors for different reviewers, the comments don't merge correctly. Highlighting disappears and the comments (from reviewers after the first one merged) are duplicated in the comments pane.

Incorporate reviewers' insertions and deletions

You can review tracked changes in two ways:

- Using the Reviewing toolbar (not available on Word 6/95)
- Using the Accept or Reject Changes dialog

Review changes by using the toolbar (Word 97 and Word 2000)

Make sure changes are highlighted on the screen and the ScreenTips option is turned on (so you can see who made each change by resting the pointer over the highlighted revision).

If revision marks don't appear in the document, point to **Track Changes** on the Tools menu, and then click **Highlight Changes**. Select the **Highlight changes on screen** checkbox.

If the reviewer information doesn't appear above the change when you rest the pointer over it, click **Options** on the **Tools** menu, choose the **View** tab, and then select the **ScreenTips** checkbox.

To...	**Do this...**
Review one change at a time	Click **Next Change** or **Previous Change** on the Reviewing toolbar.
Accept the change	Click **Accept Change**
Reject the change	Click **Reject Change**
Accept or reject all changes in one pass	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Accept All** or **Reject All**. If you change your mind, you can click **Undo**.
See how the document would look if you accepted all changes	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Changes**, without highlighting.
Display the original, unchanged document so you can see how the document would look if you rejected all changes	On the **Tools** menu, point to **Track Changes**, click **Accept** or **Reject Changes**, and then click **Original**. However, if the document contains formatting changes, Word displays the changed formatting, not the original formatting.

Incorporate reviewers' suggestions made with comments

1. On the Reviewing toolbar, click **Edit Comment**.
2. In the comment pane, select and copy the comment text or item.
3. Paste the text or item in the document where you want it to appear.

If you want to see only those comments from a particular reviewer:

1. Open the Comments pane, then click on the down-arrow next to the **Comments From** box.
2. Choose the name you want from the list. Comments by the other reviewers are not displayed until you choose another name (or **All Reviewers**) from the list.

Removing comments from a file

After dealing with editorial comments, and before the document is finalized, the writer should remove the comments. Unfortunately Word does not have a quick and easy way to remove all comments with one command, although you can record a macro to do the work.

To remove a comment:

1. Rest the pointer over the highlighted text of the first comment.
2. When the ScreenTip appears, press the **Delete** key on the keyboard.
3. Click the **Next Comment** button on the Reviewing toolbar to move to the next comment.
4. Repeat steps 2 and 3 until all comments have been deleted.

Finding more information

In addition to the online help, you might like to try:

- Leonhard, Woody, Hedspeth, Lee and Lee, T.J., *Word 97 annoyances*, O'Reilly & Associates, Inc., 1997. A great collection of tips on how to get Word 97 working the way you want, as much as possible.
- *Woody's Office Watch*, a free weekly e-mailed newsletter from Woody Leonhard. It covers the entire Microsoft Office 97 suite. I find it valuable mainly for the notices of patches that can be downloaded or ordered from Microsoft (and descriptions of why I need them), plus instructions on how to get them. To subscribe, send an e-mail message to <wow@wopr.com>.
- *WordTips*, another free weekly e-mailed newsletter of tips and tricks for using Word, from Allen L. Wyatt of Discovery Computing Inc. To subscribe, send a blank e-mail to <join-wordtips@lists.lyris.net>. Wyatt's website (http://www.VitalNews.com/) includes other relevant resources.
- Word-PC discussion list. Send e-mail with the message "Subscribe" to <listserv@listserv.liv.ac.uk>.
- Microsoft's Office Update site, for free downloads, including patches, file viewers and converters. http://officeupdate.microsoft.com/word/
- Alki Software Corporation, http://www.alki.com/, has tools for Microsoft Office, including proofing tools (spelling dictionaries, hyphenation files, and thesauri) for over two dozen languages. (You can go directly to those tools at http://www.proofing.com/.)

Chapter 4
Advanced problem-solving in Microsoft Word

You as editor may be called upon to solve some of these common problems that writers encounter with Word. This chapter attempts an all-too-brief overview of some of these problems:

- Applying and changing templates
- Applying and changing paragraph and character styles
- Using AutoText fields to hold information that changes
- Including group separators in a custom index
- Starting caption numbering at 2 or more
- Working with large documents in multiple files
- Using SEQ fields to solve numbering problems
  - Fix or avoid list numbering problems in Word 97
  - Number chapters and appendixes separately
  - Include the chapter number in other number sequences
  - Number headings
- Using fields in headers and footers
- Putting portrait headers on landscape pages
- Preventing the big red X in Word 97

This material isn't really part of the basic set of things an editor needs to know, but several people who read an early draft of this book said that they commonly encountered these problems, and encouraged me to cover them—so here they are.

Applying and changing templates

Every Word document is based on a template, which specifies the layout and styles used in the document. Templates can contain custom toolbars, macros, AutoText entries, the contents of headers and footers, standard ("boilerplate") text and graphics, and more. Some templates are effectively fill-in-the-blanks forms.

More importantly for the editor, Word lets you (or the writer) use more than one template with a document. For example, you can store personal customizations of Word (such as toolbars) in one template, project-specific or workgroup information in a second template, and document-specific information in a third. And every Word document automatically uses the so-called Normal template.

Word uses this sequence to determine which template's settings take priority:

1. The attached template (the one on which the current document is based), if there is one. Settings defined here take precedence over those in other active templates. You can change this template by attaching a different template.
2. The Normal template, which is a global template that is associated with every document you open.
3. Any other global templates. Any settings they contain that don't conflict with those in the attached or Normal templates are available. If two or more global templates are used, Word prioritizes them alphabetically.

Problems can arise when you don't have the same templates available, or when you and others are working with copies of the same templates but have changed something (such as a paragraph style definition) so the copies are no longer identical. See also "Change the information in a template" on page 73.

Determine what templates are attached to a document

1. On the **Tools** menu, click **Templates and Add-Ins**. The attached template is shown in the **Document template** box at the top of the Templates and Add-ins dialog.

Word 6/95 tip	On the **File** menu, click **Templates**.

2. Notice the **Automatically update document styles** checkbox (under the **Document template** box). If this is checked, any changes made to the document template will apply when this document is opened again. This can be a helpful feature, or it can cause havoc.

   - If the attached template is used as the starting point for a range of documents, and the individual documents can be modified (that is, company policy allows modification), then you don't want changes to the template to apply to this document unless you choose to apply them. In this case, make sure the checkbox is not selected.
   - If the attached template is used as the starting point for a series of files that are part of a larger document, or for any reason must maintain identical formatting, you do want changes to the template to apply to existing documents. In this case, make sure the checkbox is selected. (You should also ensure that only authorized people can make changes to the template; this might be you as editor, or the template designer, but not every writer who can access the template.)

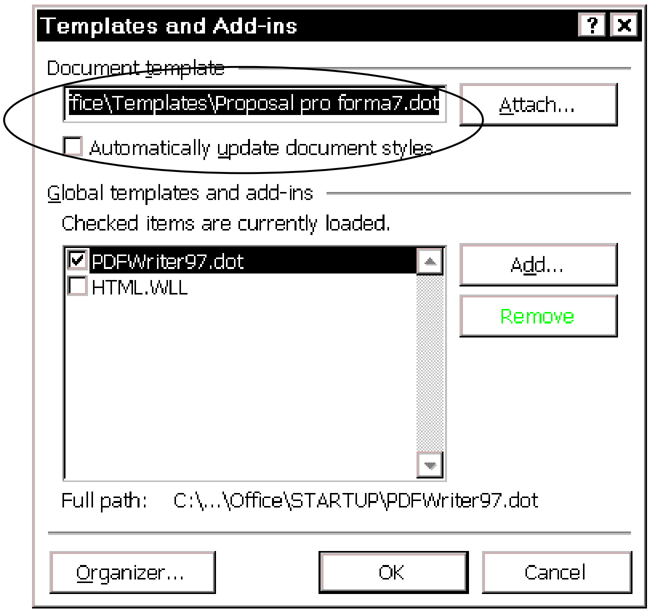


Figure 38. Determining the attached template

Change the information in a template

The usual changes an editor makes to a template is the addition and modification of styles, as described in "Applying and changing paragraph and character styles" on page 74. You may make other changes to a document's appearance, but you are less likely to want or need to save those changes in the template.

You can change a template in two ways:

- Open the template itself in Word, make changes to styles, then save the template.
- Make changes to styles in the document you're editing (that is based on the template), saving the changes to the template as well as in the document. Make sure you select the **Add to Template** checkbox in the Style dialog.

But what happens if you don't have access to the template on which the document is based? The changes don't get stored in the document template; they get stored in the document itself. Then when you send the document back to the writer, the changes you made might get overwritten by the settings in the document template or the Normal template on the other machine.

The intricacies of these interactions can drive you to distraction, if you're attempting to fix formatting problems but they don't stay fixed. You (or your client) may think it's a Word problem, but in fact the problem is usually one of document and template management.

Apply a different document template

1. On the **Tools** menu, click **Templates and Add-Ins**.
2. In the Templates and Add-ins dialog,. click **Attach**.
3. Select the required template file, then click **Open**.
4. Back on the Templates and Add-ins dialog, you'll now see the template file in the **Document template** box. Select the **Automatically update document styles** checkbox, then click **OK**.

Applying a different document template is easy, but the effects of doing so can be confusing. The styles get updated (if you remembered to select that checkbox and you used the same style names), but the page setup information and the contents of the headers and footers don't change (you have to do that manually). The main problem arises when changes have been made to individual paragraphs, overriding the styles. Some of the overriding changes will persist in the document after you apply the new template; others won't. Some of those overrides you want to keep; others you don't. So you'll have to go through the entire document very carefully, looking for things that didn't do what you wanted or expected.

There's a lot more to templates than I can cover in this chapter. If you need to work with templates at anything more than a superficial level, you'll need to consult a good, in-depth book or get someone knowledgeable to teach you—and do a lot of practicing.

Applying and changing paragraph and character styles

If your writers aren't using paragraph and character styles, they should be. More likely, they use styles, but they manually change (override) the styles for a lot of individual paragraphs. You may need to educate them, or clean up the mess they've left. Learn where the settings for paragraph and character styles are stored, how to change them, and how to recognize and fix some of the most common problems.

Note: Word comes with many predefined styles. You can alter an existing style, and give the altered style a new name; you can also create brand new styles. However, you may prefer to redefine the existing styles, keeping the original names, because changing templates is easier and more effective if the same style names are used in each template.

Define a new paragraph or character style

1. On the **Format** menu, click **Style**, then click **New**.
2. In the New Style dialog (Figure 39), type a name for the new style. In the **Style type** box, select **Paragraph** or **Character**. Select the **Add to template** checkbox. Deselect the **Automatically update** checkbox.
3. Click **Format** and choose **Font**, **Paragraph**, or whatever is relevant.
4. Make whatever selections you need, then click **OK** to return to the New Style dialog.
5. If necessary, click **Format** again and choose a different attribute to define.
6. When you are done, click **OK** on the New Style dialog and return to the Style dialog.
7. If you want this new style to apply to the highlighted text in your document, click **Apply** on the Style dialog. Otherwise click **Close**. You can now apply this new style as needed.

Note: As discussed in "Change the information in a template" on page 73, if you select the **Add to template** checkbox *and* you have access to the document template, when you save your new style, it is stored in that template. If you *don't* have access to the template, the new style is stored only in the document, just as it would be if you did not select the **Add to template** checkbox. No, you don't get any warning or other indication of what's happening.

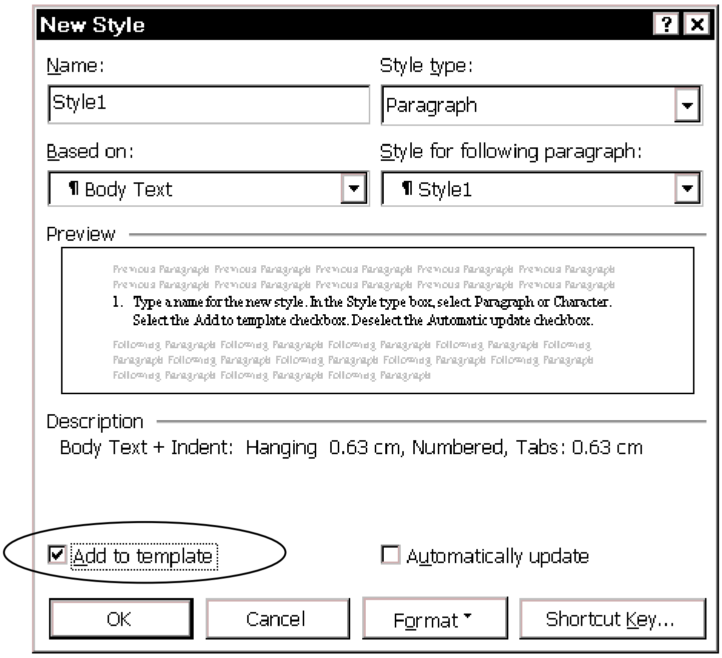


Figure 39. Adding a new style to a template

Change a style

1. On the **Format** menu, click **Style**, choose the style you want to change, then click **Modify**.
2. Click **Format** and choose **Font**, **Paragraph**, or whatever is relevant.
3. Make whatever selections you need, then click **OK** to return to the Modify Style dialog.
4. If necessary, click **Format** again and choose a different attribute to define.
5. When you are done, click **OK** on the Modify Style dialog.
6. If you want this style to apply to the highlighted text in your document, click **Apply**. Otherwise click **Close**. You can now apply this new style as needed.

Notes:

1. As mentioned in "Define a new paragraph or character style" on page 74, if you select the **Add to template** checkbox *and* you have access to the document template, when you save your changes, they are stored in that template. If you *don't* have access to the template, the changes are stored only in the document, just as they would be if you did not select the **Add to template** checkbox.
2. In many templates, most of the paragraph styles are based on the Normal paragraph style. Unless the other paragraph styles have been defined with different attributes (font typeface and size, paragraph spacing, and so on), they take those attributes from the Normal style. Therefore, if you want to change the basic text font (say, from Times New Roman to Palatino), or the basic paragraph spacing, or other attributes, you could simply change the Normal style. However, such a change does not affect styles that have fonts explicitly defined, so you'll need to check everything.

As with templates, there's a lot more to styles than I can cover in this chapter. If you need to work with styles at anything more than a superficial level, you'll need to consult a good, in-depth book or get someone knowledgeable to teach you—and do a lot of practicing.

Speed up style selection

If you need to reformat much or all of a document, you'll want to speed up the process by assigned frequently used styles to keyboard shortcuts or to toolbar buttons.

I don't use keyboard shortcuts because I can never remember them, but many people do use them; the online help explains how to set them up.

Print a style sheet

1. On the **File** menu, click **Print**.
2. On the Print dialog, in the **Print what** box, choose **Styles**, then click **OK**.

Using AutoText fields to hold information that changes

Word's AutoText and AutoCorrect features can be used for a variety of purposes. I won't discuss most of the tricks of creating and inserting AutoText and AutoCorrect entries; if you're interested, refer to the online help.

One way writers use (or should use) AutoText is to hold information that is likely to change during the course of a project. For example, the name of a manager, a product, or even your entire company may change just before the document is printed. If writers have inserted the changeable information as an AutoText field, they (or you) can change the AutoText information in one place and update all the places where that field appears.

To create an AutoText field, you must first create an AutoText entry, then insert the entry into an AutoText field.

To create a new AutoText entry:

1. Type the text you want to be in an AutoText entry.
2. Select what you typed. If it's an entire paragraph, include the paragraph mark. If it's only a phrase, but is at the end of a paragraph, make sure you do not select the paragraph mark.
3. On the **Insert** menu, point to **AutoText**, then click **New**.

Word 95 tip	On the **Edit** menu, click **AutoText**.

4. The Create AutoText dialog (Figure 40) appears. Type in the box a name for the entry you are creating. Click **OK**.

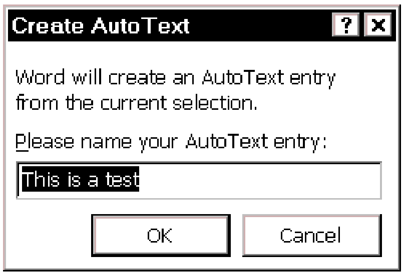


Figure 40. Creating an AutoText entry

To insert an AutoText entry into an AutoText field:

1. Put the insertion point where you want the autotext field to appear. On the **Insert** menu, click **Field**.
2. On the Field dialog, select **Links and References** in the Categories list, then **AutoText** in the list of Field names.

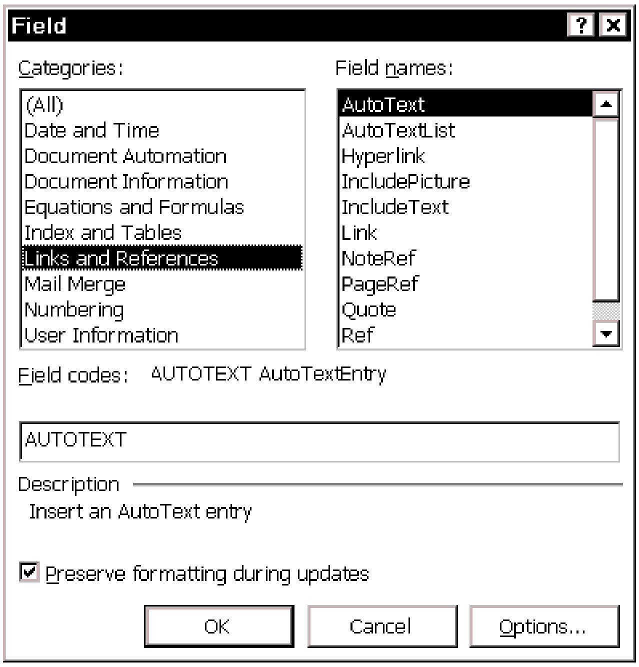


Figure 41. Selecting AutoText from the Links and References category of fields

3. Click **Options**. On the Field Options dialog, select the entry from the AutoText name list and click **Add to Field**. The entry you selected appears after the word "AUTOTEXT" in the box below the list.

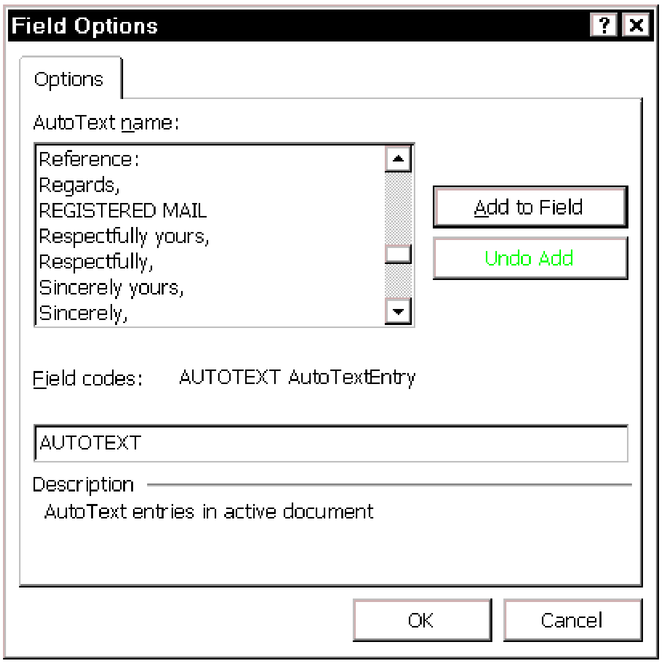


Figure 42. Selecting an autotext entry to insert in a field

4. Click **OK** to return to the Field dialog, and **OK** to insert the field in the document.

5. If you have **Field shading** set to **Always** or **When selected** on the **View** page of the Options dialog (reached from the **Tools** menu), you can tell that you've inserted a field instead of an ordinary AutoText entry.

All that is a bit cumbersome if you need to insert hundreds of fields into a document. You can speed up entering AutoText fields in two ways:

- Record a macro to do exactly what you did in the steps above. You'll need to record different macros for each entry. Put the macros on the toolbar, where you can simply click on the entry you want to insert.
- Copy the field from one place to another in the document. (This is a good way to replace words and phrases with fields, if you want to clean up a document that didn't use fields, or didn't use them consistently.)

Tip When a document is finished, and ready to be printed or sent to layout, you may wish to turn all the fields into text, so they can't get garbled at the most inconvenient time. (Archive a copy of the file before you do this, just in case you need to return to the original and change something.)

To turn all field results into text, swtich to Normal View (if you are in Page Layout View), press **Ctrl+A** to select the entire document, then press **Ctrl+Shift+F9**. (In Page Layout View, **Ctrl+A** doesn't reliably select the headers and footers.)

To edit an AutoText entry (for example, when a term in the document has changed):

1. Edit the text in an AutoText field in the document, or type the new words in a different place.
2. Select the edited entry. If it's an entire paragraph, include the paragraph mark. If it's only a phrase, but is at the end of a paragraph, make sure you do not select the paragraph mark.
3. On the **Insert** menu, click **AutoText**, then click **New**.
4. In the Create AutoText dialog (Figure 40), type in the box the exact original name of the entry you are editing. Click **OK**.
5. A confirmation dialog appears. ("Do you want to redefine the AutoText entry?") Click **Yes**.

   Note: If you don't get this message, it means you haven't typed the exact name of the original entry, and you'll be creating a new one instead of overwriting the old one. Return to step 2 and try again. (And remember to delete the extraneous new entry later.)
6. When you update fields, the edited text will appear in all the AutoText fields containing the entry you just changed. To update fields, press **Ctrl+A** to select the entire document, then press **F9**.

Including group separators in a custom index

Group separators are the letters that appear before the first item in an index that begins with "A," "B," and so on. Some index styles use group separators; others don't. The built-in index formats found on Word's Index and Tables dialog (reached from the **Insert** menu) include some formats that have group separators and some formats that don't. Figure 43 shows one of the built-in formats that does include group separators.

If you want to define your own index format, rather than using a supplied format, you could select **From template** in the **Formats** box on this dialog, but the From template format does not include index separators. If you want to include group separators, you'll have to insert your index using a field rather than using this dialog.

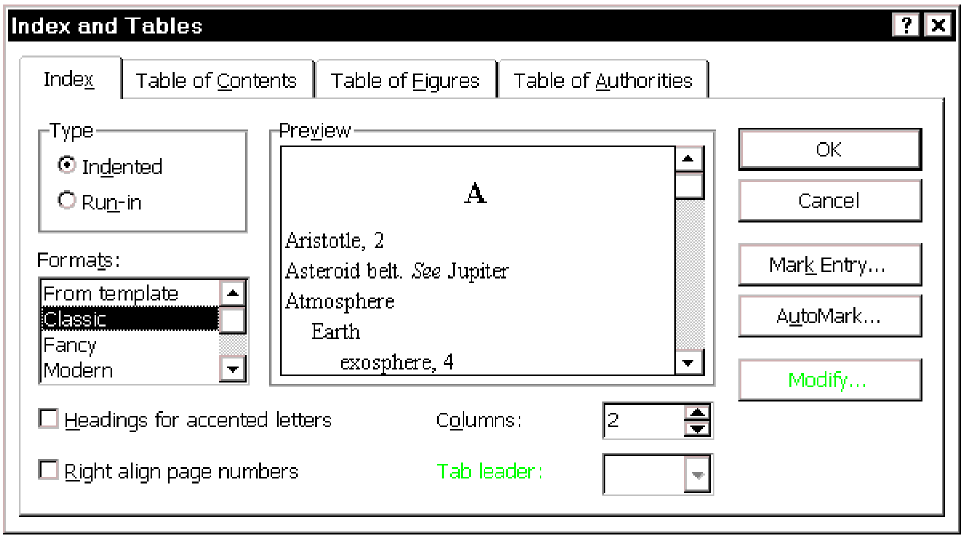


Figure 43. One of the built-in index formats that includes group separators

To use a field to include group separators:

1. Place the insertion point where you want the index to appear. On the **Insert** menu, click **Field**.
2. On the Field dialog (Figure 41), in the **Categories** list, select **(All)**. In the **Field names** list, select **Index**. Click the **Options** button.
3. On the Field Options dialog (Figure 44), select `\h "A"` and click the **Add to Field** button, then click **OK**.

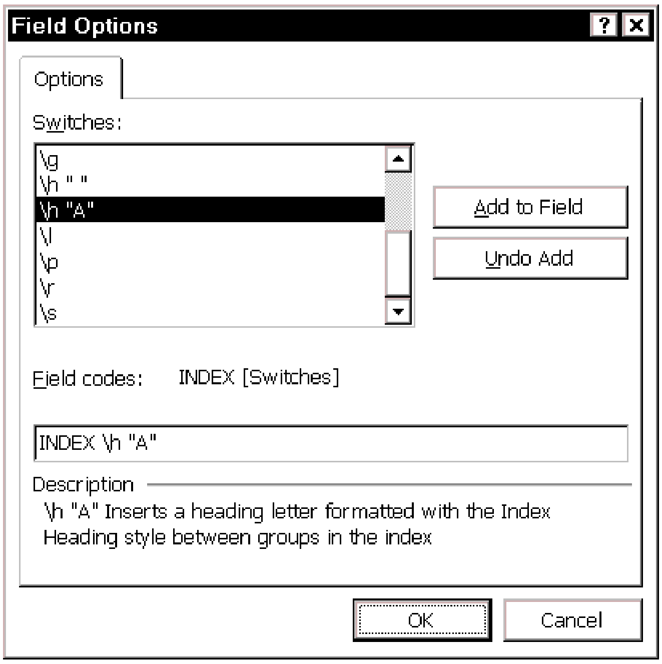


Figure 44. Adding a field option to display alphabetic separators in an index

4. Back on the Field dialog (Figure 45), make sure the **Preserve formatting during updates** checkbox is selected, then click **OK**.

Your index will be generated using the styles you have defined for Index 1, Index 2, and so on; Index Heading is the style used for the group separator letters.

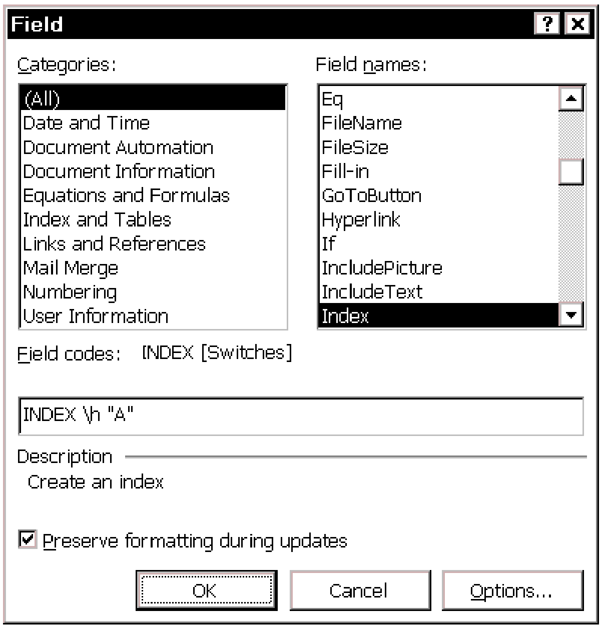


Figure 45. Specifying preserving of formatting during updates of an index

Starting caption numbering at 2 or more

Word starts all caption sequences with 1. Sometimes you want to start numbering at 2 or more. (For example, if you have chapters in separate files, but want the figures and tables to be numbered sequentially from the beginning. If chapter 1 has figures 1, 2 and 3, then the first figure in chapter 2 should be numbered 4.)

Here's how to do it:

1. If you haven't already done so, insert the first caption into the file (on the **Insert** menu, click **Caption**). If you've selected "Figure" as your label, the caption will read "Figure 1. blah blah."
2. Select the caption and press **Shift+F9** on the keyboard. The field code for the caption will appear. It will look something like this:

   ```
   { Seq Figure \* ARABIC }
   ```

3. Place the insertion point in the field code after `Seq Figure` and type `\r x` , where `x` is the number you want this figure to be. For this example, you would type `\r 4` . The field code will now look something like this:

   ```
   { Seq Figure \r 4 \* ARABIC }
   ```

4. Select the caption, then press **F9** to update the field. The field now shows "Figure 4. blah blah."
5. When you insert the next caption, it will automatically be numbered Figure 5. You don't have to change anything on captions after the first one.

Note: You can make a similar change to the field codes for Table and Equation captions, or indeed any field that produces a number sequence.

Here are some handy keyboard shortcuts to use when working with fields:

Ctrl+A	Select all. To be sure that you include the headers and footers in the selection, first switch to Normal View if you are in Page Layout View.
Shift+F9	Show or hide selected field codes.
Alt+F9	Show or hide all field codes.
F9	Update selected field codes.

Working with large documents in multiple files

Do your writers use (or try to use) Master Documents? In theory this is a great way to build large, complex documents out of a series of smaller files, but it's never worked reliably, so experienced Word users avoid it.

If you must produce large, complex documents (such as books) using Word, you can achieve the same result using another technique. This technique isn't quite as easy to use (until you get used to it), but it produces reliable results and will save you hours of hair-tearing frustration when Master Documents go wrong.

The secret is the RD (Referenced Document) field, which has the form { RD "FileName" }. This field identifies a file to include when you create a table of contents, a table of authorities, or an index for a multi-file document. A good, clear explanation is provided by Cathy Clarke and Ron Brown of the ISTC (see "Finding more information" at the end of Chapter 3 for the full Web address).

To use this technique:

1. Make sure all the documents to be included in the book have the same template applied, with the same page setup and so on.
2. If the page numbers in the book are going to be sequential throughout the book, determine the starting page number for each document and set that page number manually, as follows:
   a. On the **View** menu, click **Header and Footer**. Go to the first page of the document and highlight the header or footer than contains the page number.
   b. On the **Insert** menu, click **Page Numbers**. Click the **Format** button.
   c. On the Page Number Format dialog, in the **Page numbering** section, click **Start at:** and type the page number in the box. Click **OK**.

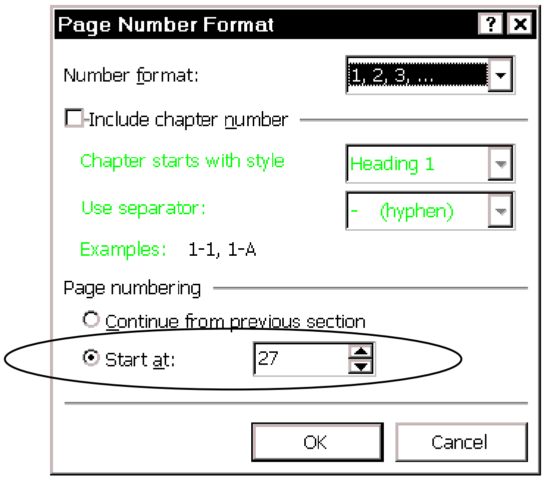


Figure 46. Specifying the starting page number for a file

3. If you have other number sequences that must carry over from one file to the next (for example, chapter numbers, figure numbers, or table numbers), you'll need to set the starting number for each of those sequences in each file. See "Using SEQ fields to solve numbering problems" on page 82 for more information about sequence fields.

   This is the main nuisance when using RD—you must manually set starting page numbers and sequence values in the individual files. But the results are reliable, so it's worth the bit of extra effort.

4. In the file where the table of contents is to appear, on the **Insert** menu, click **Field** to insert each of these fields, each in its own paragraph:

   ```
   { TOC }
   { RD filename1.doc }{ RD filename2.doc }{ RD filename3.doc }
   ```

   Notes:

   1. Include the path with the filename if the document files are not in the same directory as the file containing the TOC field.
   2. If the location includes a long file name with spaces, enclose it in quotation marks. Replace single backslashes with double backslashes to specify the path, for example: "C:\\My Documents\\Manual.doc". Be careful to specify the path and filename exactly.
   3. RD fields are formatted as hidden text, so you won't see them unless you display hidden text (click **Show/Hide**).

4. To generate the table of contents, select the { TOC } field and press **F9**.
5. Similarly, in the file where the index is to appear, on the **Insert** menu, click **Field** to insert:

   ```
   { INDEX }
   { RD filename1.doc }{ RD filename2.doc }{ RD filename3.doc }
   ```

6. To generate the index, select the { INDEX } field and press **F9**.
7. If you displayed hidden text to see the RD fields, click **Show/Hide** again to hide the fields.

Notes:

1. RD fields don't display a result in the document, so you cannot unlink an RD field (unlinking means to change field results to regular text).
2. RD fields that reference a series of files must be in the same order as the files in the final document.

Using SEQ fields to solve numbering problems

You can use Word's SEQ (sequence) fields for many purposes, for example:

- Fix or avoid list numbering problems in Word 97
- Number chapters and appendixes separately
- Include the chapter number in other number sequences
- Number headings

Fix or avoid list numbering problems in Word 97

Word 6/95 In general, Word 6/95 users don't need to worry about these numbering problems.

However, the technique described here does work in Word 6/95, and you might want to use it if your document is to be converted into some other format for layout and the conversion doesn't handle list numbering cleanly.

Word 97's (and Word 2000's) autonumbering feature works well in some circumstances, but it causes major problems for many people in other situations. To avoid these problems:

1. Deselect all the list autoformatting functions in the AutoCorrect dialog.

2. For best results, and particularly if the Word document will later be converted into online help or some other program's format (for example, FrameMaker), define styles for numbered and bulleted list items.

   If you want more than one paragraph in any one list item (that is, a paragraph that doesn't have a number or bullet but is indented to line up with the text of the list item—like this paragraph), define a "list continuation" style.

3. Type your lists as ordinary paragraphs, then select them, apply the appropriate paragraph style, then click the number or bullet button on the toolbar.

4. If some of your lists don't start at 1 when you want them to, simply put the insertion point in the first item of the list, open the **Format** menu, click **Bullets and Numbering**, select **Restart numbering**, then click **OK**.

   Similarly, if you want a list number scheme to continue, but Word hasn't done it for you, open the Bullets and Numbering dialog (on the **Format** menu, click **Bullets and Numbering**) and select the **Continue previous** list button.

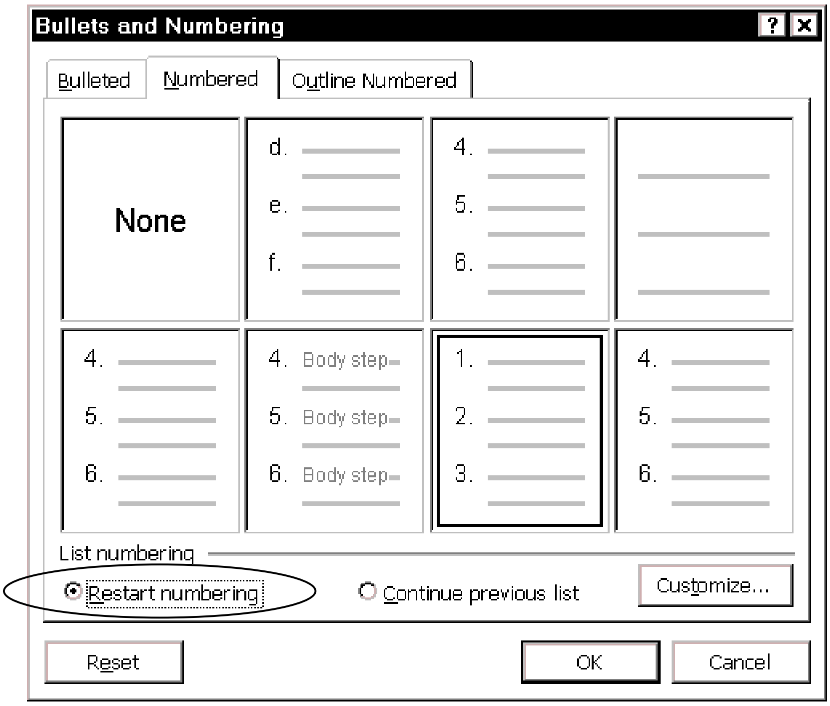


Figure 47. Restarting list numbering at 1

If you find that these steps don't solve the list numbering problems in your document (particularly if you need to bring the document into some other program, keeping list numbering intact), you'll need to use Sequence fields on your lists. These are much easier to set up and use than you might think. The following instructions are adapted from an excellent description given by David Knopf (see "Finding more information" on page 96).

First, create two new AutoCorrect entries in the Normal template:

1. Start a new, blank document. Press **Alt+F9** to display field codes.
2. On the **Insert** menu, click **Field**. In the box at the bottom of the Field dialog, replace the equal sign with `SEQ Step \r 1` , then click **OK**.

Tip You can use the keyboard shortcut **Ctrl+F9** to insert a blank field, then type `SEQ Step \r 1` between the curly brackets.

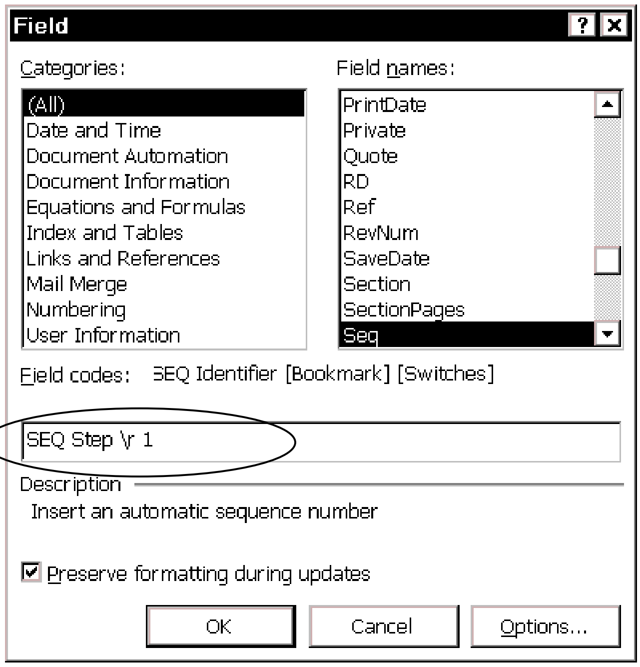


Figure 48. Defining a sequence field using the Field dialog

3. Back in your document, press **Enter** to start a new paragraph.
4. Insert another field for `SEQ Step \n` .
5. Highlight the first field you created (the one that says `SEQ Step \r 1`). Be careful not to highlight the paragraph mark at the end of the line.
6. On the **Tools** menu, click AutoCorrect. In the **Replace** box (see Figure 49), type `1]` (you can use any character you want; it doesn't have to be]). If your document style is to include a period after the number, type a period after the 1 shown in the **With** box. Click **OK**.

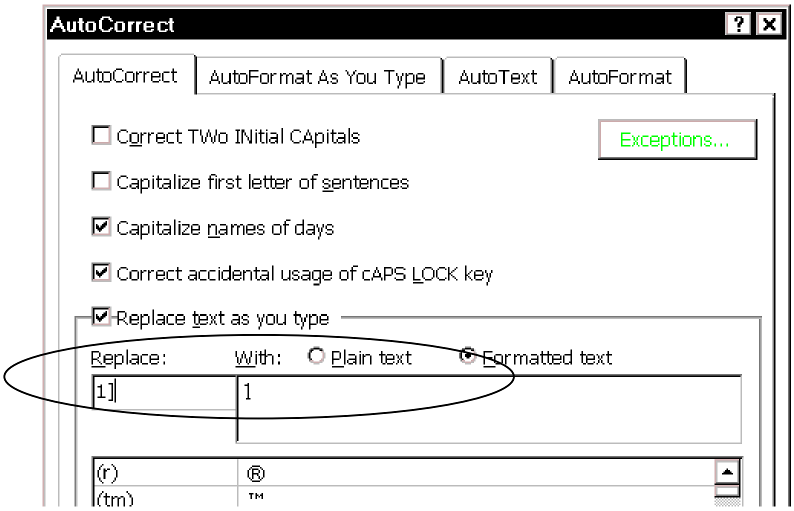


Figure 49. Defining an AutoCorrect entry

7. Highlight the second field you created (the one that says `SEQ Step \n`). Be careful not to highlight the paragraph mark at the end of the line.
8. On the **Tools** menu, click **AutoCorrect**. In the **Replace** box, type `n]` . Click **OK**.
9. Save the document.

Second, define a new style for numbered lists:

1. On the **Format** menu, click **Style**, then click **New**.
2. On the New Style dialog (Figure 50), name the style (perhaps "Body Step" to keep it near "Body Text" in the style list), and select the new style name in the **Style for the following paragraph** list. Select the **Add to template** checkbox.

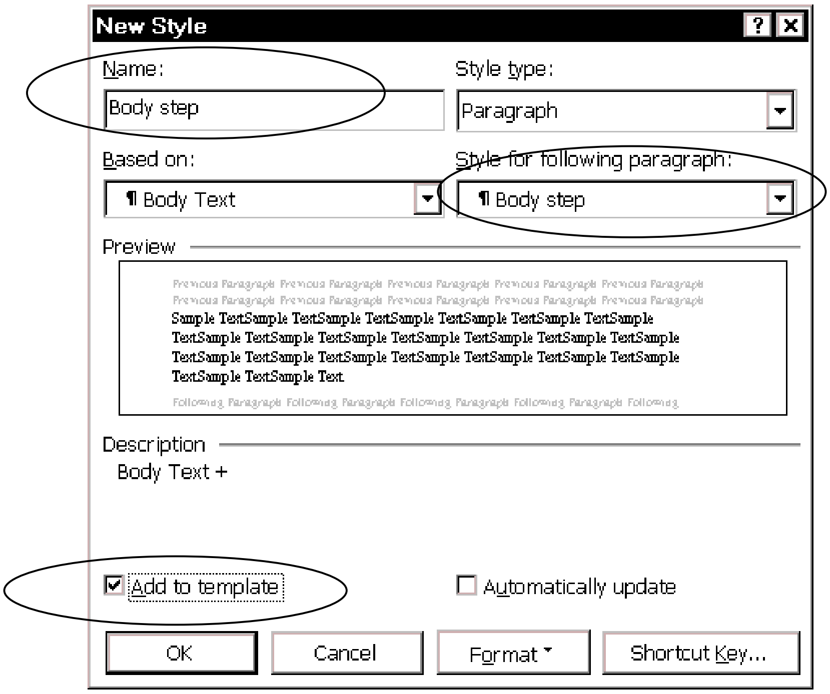


Figure 50. Defining a new style for numbered list paragraphs

3. Click **Format** and select **Paragraph**. On the Paragraph dialog (Figure 51), include a hanging indent.

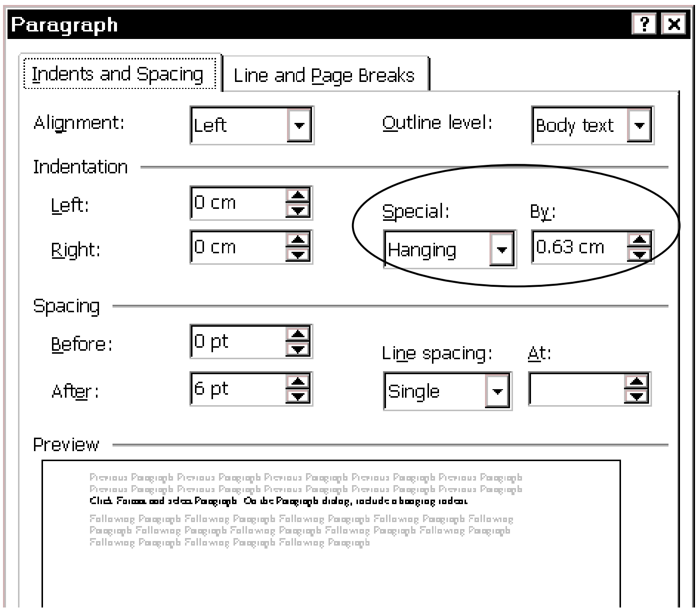


Figure 51. Including a hanging indent in a paragraph style definition

4 Click the **Tabs** button and specify a left tab at the same position as the hanging indent (see Figure 52).

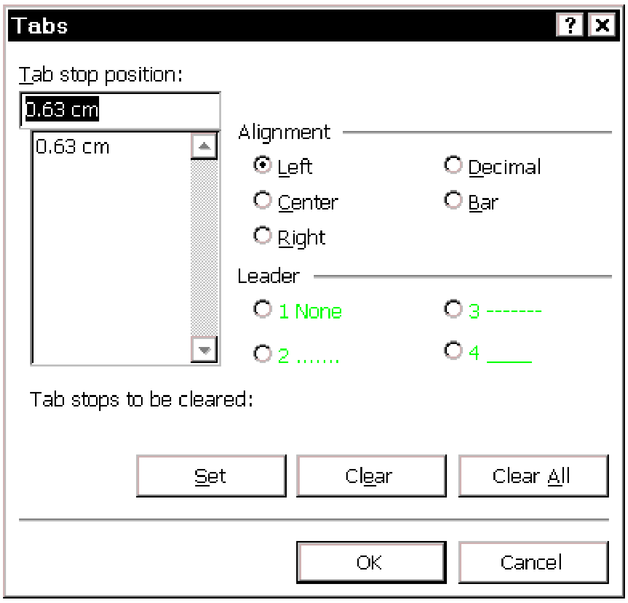


Figure 52. Defining a tab step in a paragraph style

5. Click **OK** twice to return to the New Style dialog (Figure 50).
6. Click **Format** and select **Numbering**. On the **Numbered** tab, make sure **None** is selected. Click **OK** twice to return to the Style dialog, then click **Close**.

To make it all work when writing a numbered list:

1. At the point where you want a numbered list to start, press **Enter** to start a new, blank paragraph. Apply the style you just created (Body Step in this example) to this new paragraph.
2 Type `1]`, press the **Tab** key, then type the text of the first item in the numbered list.
3 For the second and subsequent items:
   a. Press **Enter** to start a new paragraph.
   b. Type `n]`, press the **Tab** key, then type the text of the next item in the numbered list.
4. At the end of the list, press **Enter** to start a new paragraph, apply the usual "body text" style to the new paragraph, then continue typing.

When editing an existing numbered list:

1. If the list items already have numbers, select the list and click the number button on the toolbar to remove the numbers from the paragraphs.
2. Apply the style you created (Body Step in this example) to these paragraph, which should now show hanging indents but no numbers.
3. Place the insertion point at the beginning of the first paragraph. Type `1]`, then press the **Tab** key.
4. For the second and subsequent list items, move the insertion point to the start of the next paragraph, type `n]`, then press the **Tab** key.

Notes:

1. If the numbers get out of sequence (for example, because you add or delete list items, or change the order of items on the list), select the list and press **F9** to update the fields.
2 If you want nested lists (for example, sub-steps a and b under step 3), you can define other styles, with different indentations from the left margin, and other AutoCorrect items, such as `a]`, `x]` for the number sequences.
3. See the Tip on page 78 for information about turning field results into text.

Number chapters and appendixes separately

In Chapter 3, "Editing using Microsoft Word," I mentioned one way to number chapters and appendixes separately.

A more versatile solution uses sequence (SEQ) fields. Set up one sequence for chapters and a separate sequence for appendixes.

To set up the chapter numbering sequence:

1. Place the insertion point where you want the chapter number to appear (for example, after the word "Chapter" in the chapter's title). On the **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Chapter.
4. Click **Options.** On the Field Options dialog, choose the **General Switches** tab, select **123** in the **Formatting** list and **0** in the **Numeric** list, then click **Add to Field**.

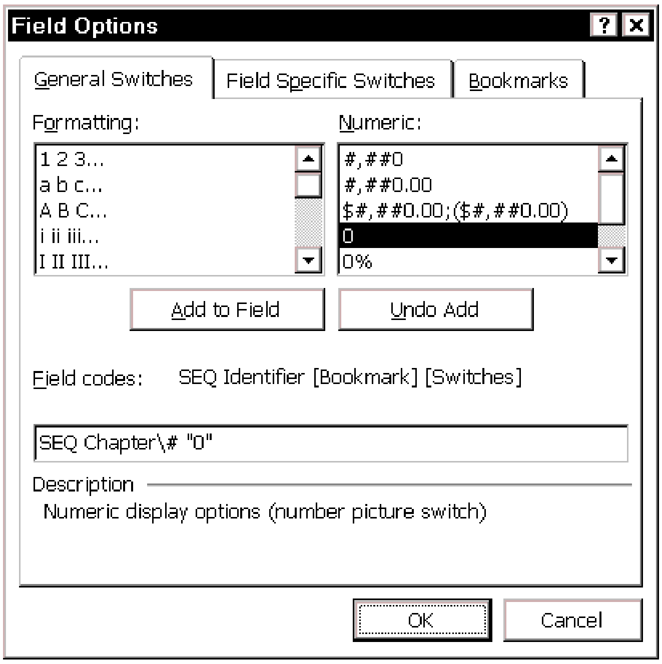


Figure 53. Specifying the display option for a chapter number sequence

5. Choose the **Field Specific Switches** tab, select **\h**, then click **Add to Field**.

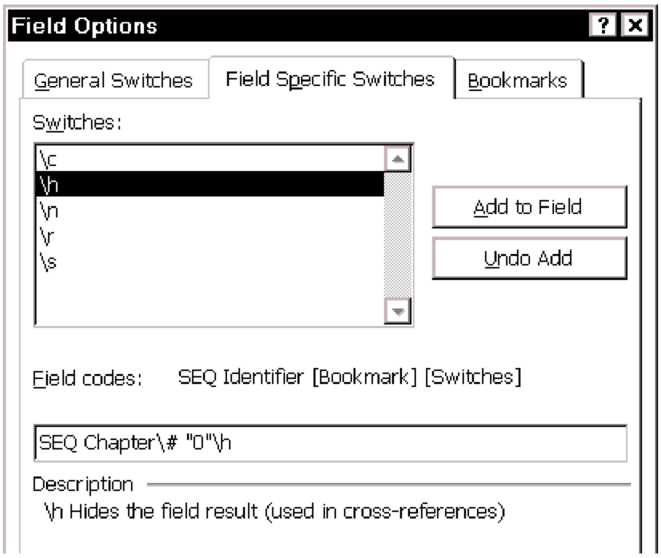


Figure 54. Specifying the \h option for a chapter numbering sequence

6. Click **OK** twice to insert the field, which will display as 1.
7. Insert the same field each place you want a new chapter number to appear in the file. (To speed up this process, you could save the field code as an autotext entry and assign it to a toolbar button.) If the chapter numbers do not display in the correct sequence, select all of the text and press **F9** to update fields.

Note: If your document contains more than one file, you will need to manually set the first chapter number in each file. If you intend to use the chapter number in any other number sequence (as described in "Include the chapter number in other number sequences" on page 89), this is worth doing.

To set a chapter number, follow the procedure above, but in step 4:

- On the **General Switches** tab of the Field Options dialog, do not select anything.
- On the **Field Specific Switches** tab of the Field Options dialog, select **\r** (not \h) and type the chapter number after the **r**. The fields would therefore be `SEQ Chapter \r1` (for Chapter 1), `SEQ Chapter \r2`, `SEQ Chapter \r3`, and so on.

To set up the appendix numbering sequence:

1. Place the insertion point where you want the first appendix number to appear (for example, after the word "Appendix" in the title). On the **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Appendix.
4. Click **Options.** On the Field Options dialog, choose the **General Switches** tab, select **A,B,C** in the **Formatting** list, do not select anything in the **Numeric** list, then click **Add to Field**.
5. Click **OK** twice to insert the field, which will display as A.

6. Insert the same field each place you want a new appendix number to appear in the file. (To speed up this process, you could save the field code as an autotext entry and assign it to a toolbar button.)

Note: If the appendixes are in separate files, you need to manually set the appendix number in each file. If you intend to use the chapter number in any other number sequence (as described in "Include the chapter number in other number sequences" on page 89), this is worth doing.

To set an appendix number, follow the procedure above, but add to step 4:

- Choose the **Field Specific Switches** tab, select **\r**, and type the numeric equivalent of the appendix number after the **r**. The fields would therefore be `SEQ Appendix \* ALPHABETIC \r1` for Appendix A, `SEQ Appendix \* ALPHABETIC \r2` for Appendix B, `SEQ Appendix \* ALPHABETIC \r3` for Appendix C, and so on.

Include the chapter number in other number sequences

One reason to go to the trouble of setting up sequence fields for chapter and page numbers is to be able to easily include the chapter or appendix number in other number sequences, such as page numbers, figures numbers, and table numbers.

You might want to number your pages 1-1, 1-2, 1-3 etc in Chapter 1, 2-1, 2-2, 2-3 etc in Chapter 2, and so on. To do this:

1. On the **View** menu, click **Header and Footer** (or double-click in the header or footer area).
2. Position the insertion point where you want the page number to appear or (if page numbers are already in the document) just before the page number field.
3. Press **Ctrl+F9** to insert a blank field, then type `SEQ Chapter \c` between the curly brackets. (For Appendixes, type `SEQ Appendix \* ALPHABETIC \c )`.

Note: You can also insert these fields using the Field dialog, as described in "Number chapters and appendixes separately" on page 87.

To have the chapter numbers appear in the table of contents along with the page numbers, you need to add the "s" switch to the TOC field. In this example, you have used Chapter as your sequence name, so your TOC field should look something like this (refer to the online help for more information about these switches):

```
{ TOC \o "2-3" \t "Heading 1,1" \s "Chapter" }
```

Similarly, to have the chapter numbers appear in the index along with the page numbers, use an INDEX field something like this:

```
{ INDEX \c "2" \h "A" \s "Chapter" }
```

Number headings

If your organization uses heading numbering (also known as outline numbering) in its documents, you may have had problems using Word's outline numbering system. If so, try this technique:

1. Remove any existing heading numbering from all headings in the document.
2. Set up a numbering field for Heading 1 paragraphs.
3. Set up a numbering field for Heading 2 paragraphs.
4. Repeat as necessary for Heading 3 and other paragraphs.

To remove existing heading numbering from the document:

1. On the **Edit** menu, click **Select All** (or press **Ctrl+A**).
2. On the **Format** menu, click **Bullets and Numbering**, and then click the **Outline Numbered** tab.
3. Click **None**, then click **OK**.

To set up Heading 1 numbering (1.0, 2.0, 3.0, and so on):

1. Click before the first character of your first Heading 1 paragraph. On the **Insert** menu, click **Field**.
2. On the Field dialog, choose **Numbering** from the **Categories** list, then choose **Seq** from the **Field names** list. SEQ appears in the box below the lists.
3. In the box, after SEQ, type a name for the numbering sequence, such as Heading1.
4. Click **Options.** On the Field Options dialog (Figure 55), choose the **General Switches** tab, select numeric 0.00, then click **Add to Field**. Delete the extra zero so formatting is "0.0" (don't delete the closing quote mark).

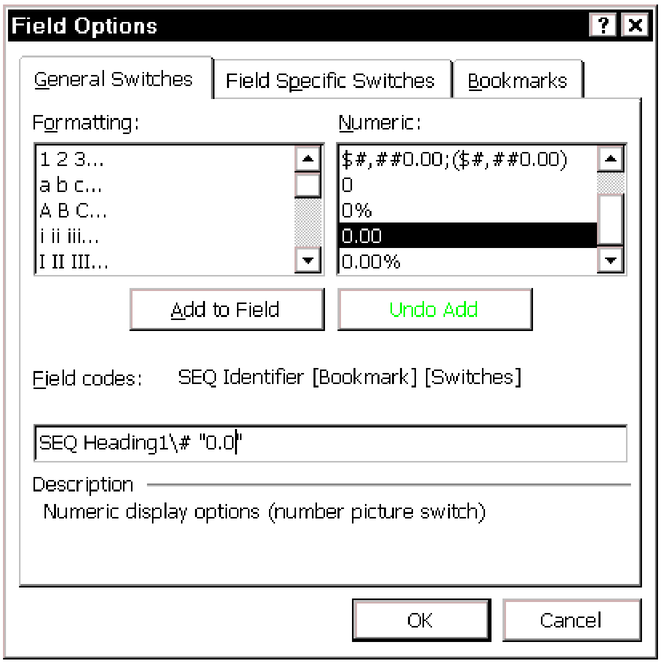


Figure 55. Choosing general switches for the SEQ field, using the Field Options dialog

5. On the **Field Specific Switches** tab, select **\h**, then click **Add to Field**.
6. Click **OK** twice to insert the field, which will display as 1.0 with no space between the 0 and the first character of the heading. Press the spacebar once or twice to insert some space.

   If you want to see the field contents, highlight the paragraph and press Shift+F9. The field looks like this:

   ```
   { SEQ Heading1\# "0.0"\h \* MERGEFORMAT }
   ```

   Note: If you prefer, you can insert this field by pressing **Ctrl+F9** and typing the field contents exactly as shown above.

7. Insert the same field at the beginning of each Heading 1 paragraph in the file. (To speed up this process, you could save the field code as an autotext entry and assign it to a toolbar button.)

To set up Heading 2 numbering (1.1, 1.2, 1.3, and so on), you need to insert two fields:

- The first field picks up the preceding Heading 1 number and the deminal point, but without the final zero.
- The second field inserts the number after the decimal point.

To insert the first field, repeat the steps for Heading 1 numbering, with these changes:

1. Call the field Heading2.
2. Delete the two zeros after the decimal point, so the switch is “0.” and choose the \c switch (instead of the \h switch). The field now looks like this:

```
{ SEQ Heading2\# "0."\c \* MERGEFORMAT }
```

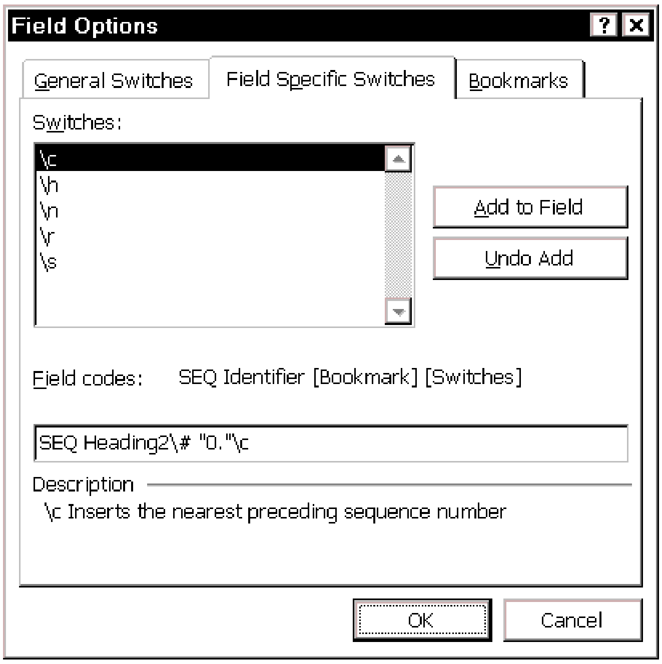


Figure 56. Choosing field-specific switches using the Field Options dialog

3. After inserting the field, do not press the spacebar to insert any space.

To insert the second field (the number after the decimal point), repeat the steps for Heading 1 numbering, with these changes:

1. Call the field SubHeading.
2. Insert a zero, so the switch is "0" (with no decimal point). The second field now looks like this:

```
{ SEQ SubHeading\# "0"\h \* MERGEFORMAT }
```

3. Here’s the tricky bit: for the **first** Heading 2 under each Heading 1, you must change the SubHeading field to include **\h** instead of **\r1**, to restart the numbering sequence after the decimal point, so the field looks like this:

```
{ SEQ SubHeading\# "0"\r 1 \* MERGEFORMAT }
```

If you don't, you will end up with numbers like this:

1.0 Heading 1 Title
    1.1 Heading 2 Title
    1.2 Heading 2 Title
    1.3 Heading 2 Title

2.0 Heading 1 Title
    2.4 Heading 2 Title (should be 2.1)
    2.5 Heading 2 Title (should be 2.2)
    2.6 Heading 2 Title (should be 2.3)

4. Together, the two fields look like this:

   For the first Heading 2 under each Heading 1:

   ```
   { SEQ Heading2\# "0."\c \* MERGEFORMAT }{ SEQ SubHeading\#
   "0"\r 1 \* MERGEFORMAT }
   ```

   For alll other Heading 2s under each Heading 1:

   ```
   { SEQ Heading2\# "0."\c \* MERGEFORMAT }{ SEQ SubHeading\#
   "0"\h \* MERGEFORMAT }
   ```

Using fields in headers and footers

You can insert fields in headers and footers, to include information such as the chapter title, the date, the author, and so on.

See "Include the chapter number in other number sequences" on page 89 for instructions on inserting a chapter number before the page number in a header or footer. (You can use the built-in Word page numbering scheme, but if you do, the chapter numbers don't reliably carry over into a table of contents or index.)

The easiest field to insert is a cross-reference to the document's title, a bookmark, or some other element that appear in the Cross Reference dialog (reached from the **Insert** menu; click **Cross Reference**).

For more flexibility, you may wish to include a field that changes with the headings on a page. For example, you might want to include the first Heading 2 that appears on a page. You can do this using the Styleref field:

1. Place the insertion point in the header or footer where you want the field to appear.
2. On the **Insert** menu, click **Field**.
3. On the Field dialog (Figure 57), choose **Links and References** in the **Categories** list and **StyleRef** in the **Field names** list, then click the **Options** button.
4. On the Field Options dialog (Figure 58), choose the **Styles** tab. Select the required style name from the list shown and click **Add to Field**.
5. Click **OK** to return to the Field dialog. The selected style is now listed after STYLEREF in the box below the lists.
6. Click **OK**. The field is inserted. You can now work with this field as you would work with any other field.

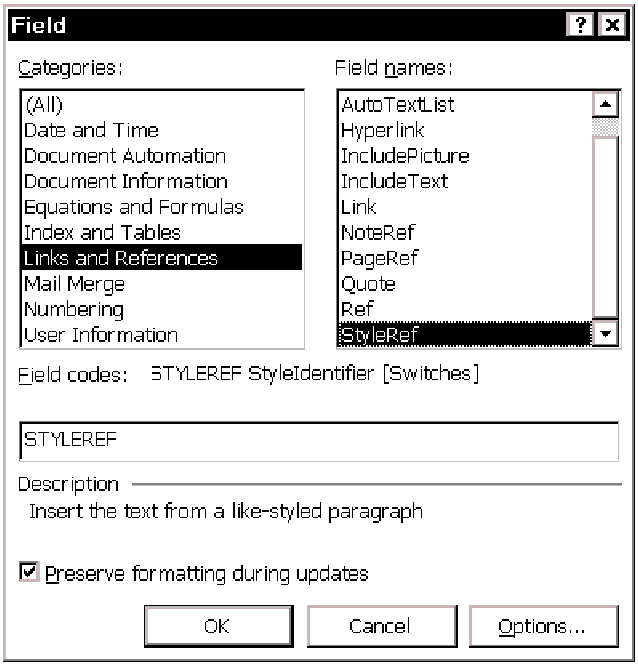


Figure 57. Using the StyleRef field

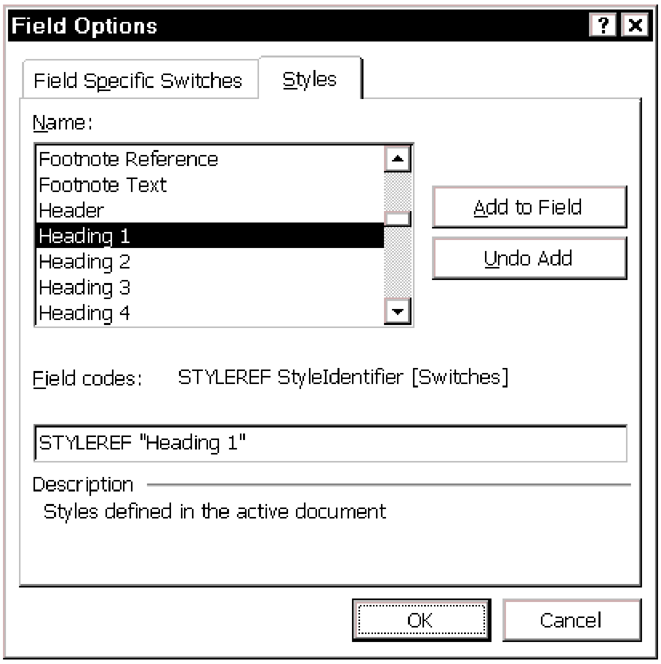


Figure 58. Selecting the paragraph style to be referenced by the StyleRef field

Putting portrait headers on landscape pages

A common problem is dealing with a document that contains mostly portrait pages, with a section of landscape pages in the middle. If you want the headers of all the pages to print on the short side of the paper (the "top" as you're looking at the sheet of paper), follow these instructions (this is actually easier to do than to describe):

1. Put a section break before and after the pages to be in landscape orientation.
2. Place the insertion point anywhere in the section to be in landscape orientation. In the Page Setup dialog, on the **Paper Size** tab (Figure 59), select **Landscape** orientation. Make sure the **Apply to** box shows **This section**, then click **OK**.
3. On the **View** menu, click **Header and Footer**.
4. Position the insertion point in the header. Click the **Same as Previous** button to disconnect the landscape section's header from the previous section's header. Repeat for the footer.
5. Move to the header of the portrait section after the landscape section. Click the **Same as Previous** button to disconnect the section's header from the landscape section's header. Repeat for the footer.

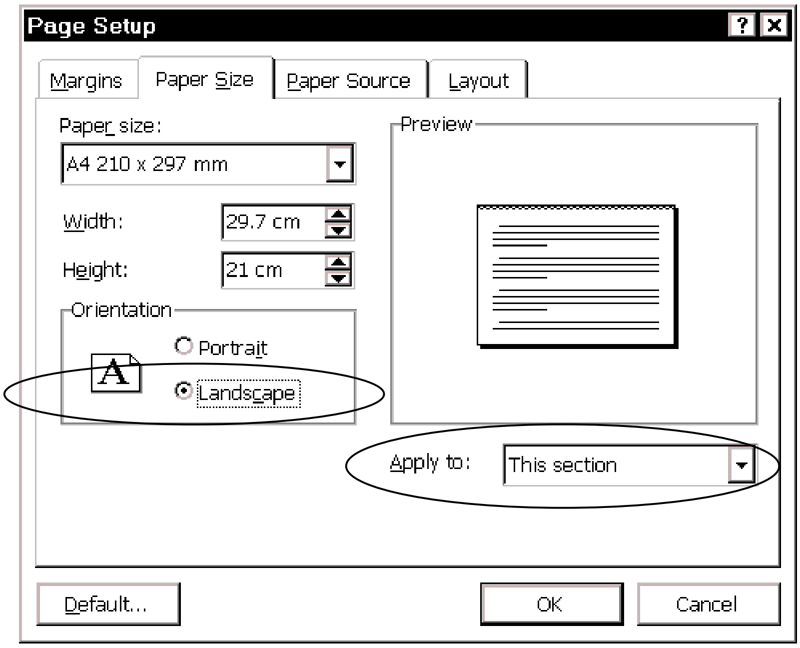


Figure 59. Selecting landscape orientation for this section

6. Position the insertion point in the header of the landscape section (along the long side of the page), as shown in Figure 60. On the **Insert** menu, click **Text Box**. Draw a text box in the right margin area of the landscape page (along the short side of the page that you want to be the top of the page). The text box will remain selected.
7. On the **Format** menu, click **Text Box**. On the **Color and Lines** tab, under **Line**, change **Color** to **No Line**, and then click **OK**.
8. Click in the text box. On the Text Box toolbar, click the **Change Text Direction** button to change the text to the required direction (orientation).
9. Type or copy the required header text into the text box. To add the page number, click the **Page Number** button on the Header And Footer toolbar.

10. Make any other necessary formatting changes.

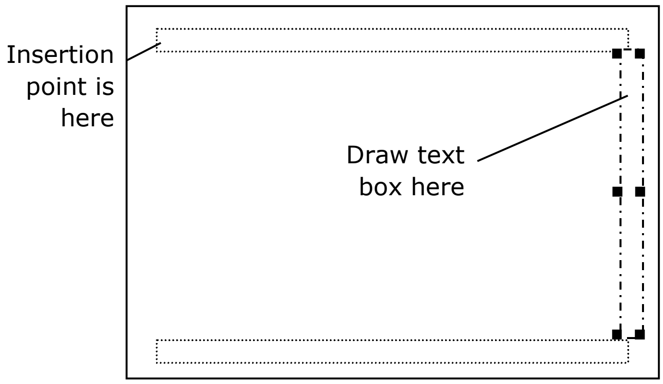


Figure 60. Drawing a text box to hold a portrait header on a landscape page

11. Repeat steps 5-9 for the footer.
12. On the Header and Footer toolbar, click **Close**. When you insert the text box while in the edit header/footer mode, Word treats it as a header/footer object and it appears on each page. No copying and pasting the text onto each page of your document.

Word 6/95 This technique does not work, unless you use WordArt to rotate the text in the text box. You insert a text box from the **Drawing** toolbar, not the **Format** menu.

Preventing the big red X in Word 97

A common problem is receiving a document that should contain graphics, but some or all of the graphics are displayed as red Xs or a general picture (a circle, square and triangle).

Lots of things can go wrong with graphics in Word. A full treatment of the problems would take up another full chapter in this book, so I'll just mention two common problems.

First, graphics can be either embedded or linked or both. If you did not receive linked graphics with the text file, you'll need to get them sent to you, and you'll have to make sure they are stored in a folder with the exact same path as on the system they were sent from, because Word uses "absolute" path names instead of "relative" path names.

Second, many graphics problems can be solved by making these changes:

1. Upgrade your copy of Word 97 to SR-1 or SR-2 (best).
2. Turn off Fast Save: on the **Tools** menu, click **Options**. On the **Save** tab, deselect the **Allow Fast Saves** checkbox.
3. Turn off **Update Automatic Links at Open**: On the **General** tab of the Options dialog, deselect the **Update automatic links at Open** checkbox.

Unfortunately, after having done that, you'll probably also have to manually restore the missing or corrupted graphics.

Some other problems can cause the missing-graphics effect, so what you have to do to recover or prevent the problem will vary. For a full treatment of the problem and how to restore the graphics, read this item in the Microsoft Knowledge Base:

WD97: Picture displayed as red "X" in document,
http://support.microsoft.com/support/kb/articles/q162/3/49.asp

Finding more information

- Clarke, Cathy and Brown, Ron, "Word can do it," is a discussion about referenced documents, sequence numbers, field codes, and how to make them all work. Institute of Scientific and Technical Communicators (ISTC), http://www.istc.org.uk/wordcan.htm
- Knopf, David, "Autonumbering with RoboHELP on Word 97," http://www.knopf.com/tips/01-autonumbering/autonumber.htm
- Microsoft Knowledge Base, "WD97: Picture displayed as red 'X' in document," http://support.microsoft.com/support/kb/articles/q162/3/49.asp

Chapter 5
Editing using Lotus Word Pro

Lotus Word Pro is part of Lotus SmartSuite, an integrated group of applications that includes 1-2-3 (spreadsheet), Freelance Graphics (presentations), Approach (database), and other programs.

Word Pro is less commonly used than Microsoft Word, so an editor is less likely to be experienced in its use. If you are suddenly faced with a document in Word Pro, or you are applying for work with a company that uses Word Pro, you'll need to come up to speed quickly.

Word Pro does most of the same things as Microsoft Word, but it does many of them just a bit differently—enough that some features may confuse you thoroughly at first.

This chapter provides a brief summary of how to use Lotus Word Pro to accomplish the following tasks:

- Setting up Word Pro to make editing easier
- Marking and tracking changes
- Inserting comments and questions
- Checking spelling and grammar
- Finding and replacing text
- Applying and changing paragraph and character styles
- Applying and changing SmartMasters (templates)
- Editing an index
- Editing a table of contents
- Editing headers and footers
- Editing footnotes and endnotes
- Changing page layouts
- Changing table layouts
- Using automatic cross references
- Editing glossary and document field entries
- Editing or annotating graphics, including photographs and screen captures
- Accepting or rejecting editorial changes and comments
- Removing comments from a file

The explanations in this chapter are for Word Pro 97.

Setting up Word Pro to make editing easier

If you use Word Pro a lot, you'll want to take the time to set up the interface to suit your work and your personal preferences. But even if you use Word Pro only occasionally, you can make a few quick changes to make your work much easier. Here are the things I always change when I install Word Pro on a new machine:

- Turn on backup copies and verify personal information
- Display paragraph marks, tabs, text boundaries and other items
- Set up the spelling and grammar options to suit your preferences

You can change many other Word Pro features to suit your preferences and working habits, but I'm only mentioning the very basics needed to get to work editing.

Tip To reveal whether you are in Insert mode or Typeover mode, click the longest button in the status bar (bottom of the Word Pro screen).

Turn on backup copies and verify personal information

Unless you are very short of hard disk space, you'll want to create backup copies of the documents you're working on when you save them.

To turn on backup copies:

1. From the **File** menu, point to **User Setup**, then click **Word Pro Preferences**.
2. On the **General** tab (Figure 61), select the **Auto back up documents** checkbox.

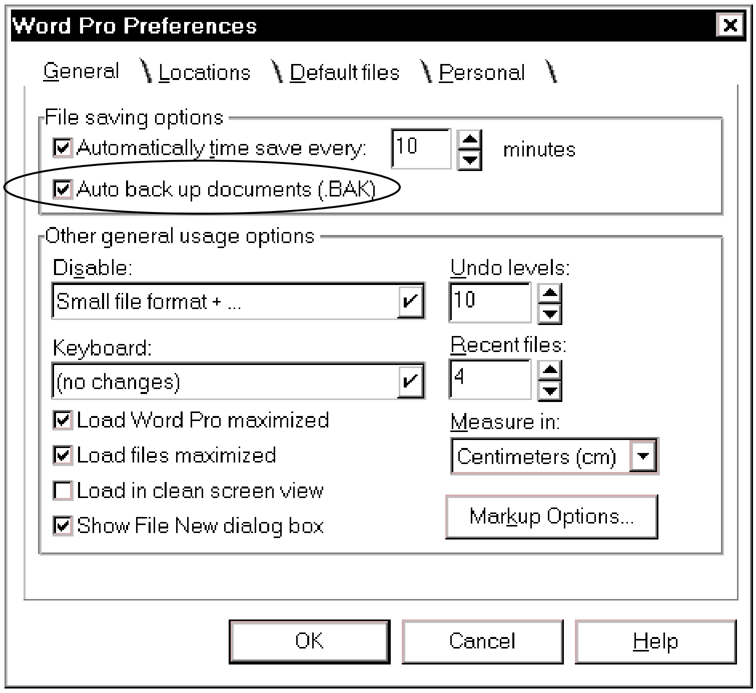


Figure 61. Choosing general preferences

3. You may also want Word Pro to automatically save your document every 5 or 10 minutes (or some other time interval). To turn on autosave, select the **Automatically time save** checkbox, and select an appropriate length of time.

4. While you're in Word Pro Preferences, look at the selections in the **Disable** drop-down list and the settings on other tabs, and change anything you want to better suit the way you work. For example, I find the background spelling check extremely distracting, so I disable it.
5. Also look at the **Personal** tab to make sure your name, initials and other information are correct. Word Pro 97's revision features mark your changes and comments with the name or initials stored here.

Display paragraph marks, tabs, text boundaries and other items

Editing (and writing, for that matter) is much better done when you can see as much as possible of what's going on in Word Pro. You need to know whether the writer has included unnecessary blank paragraphs or tabs, or made the tables or graphics too wide so they intrude into the margins of the page, so you can fix these problems.

1. On the **View** menu, click **Set View Preferences**.
2. Choose the **Show** tab, then select the checkboxes for **Show margin guides**, **Show table guides**, and any other items you prefer.
3. On the same tab, in the **Show marks** drop-down list, select **Tabs**, **Returns**, and any other items you prefer.

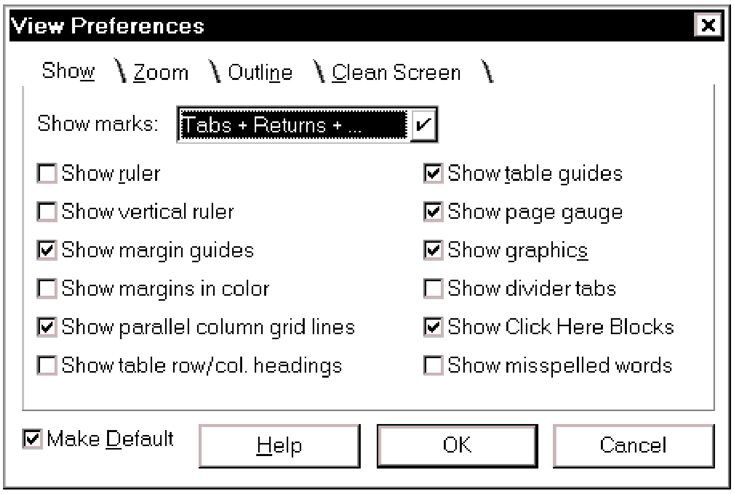


Figure 62. Choosing view preferences

4. If you want to make these selections the default, select the **Make Default** checkbox.
5. During part of your editing, you may want to deselect **Show graphics**, to speed up page loading (graphics will be represented by a blank box the size of the graphic).

Set up the spelling and grammar options to suit your preferences

To set the spelling checker options to what you want:

1. On the **Edit** menu, click **Check Spelling**. The Spell Check bar appears at the top of the document window. On the Spell Check bar, click **Options**.
2. On the Spell Check Options dialog (Figure 63), choose settings that are useful for you.
   - If you don't use a custom (user) dictionary that includes words with numbers (for example, AS/400), you might want to deselect **Check words with numbers**.

- Here you can also check what custom dictionaries are active for this document, add or remove dictionaries by clicking the **Choose Dictionaries** button, create a new dictionary, or edit the contents of an existing dictionary. (See also “Create and use a custom (user) dictionary“ on page 106.)

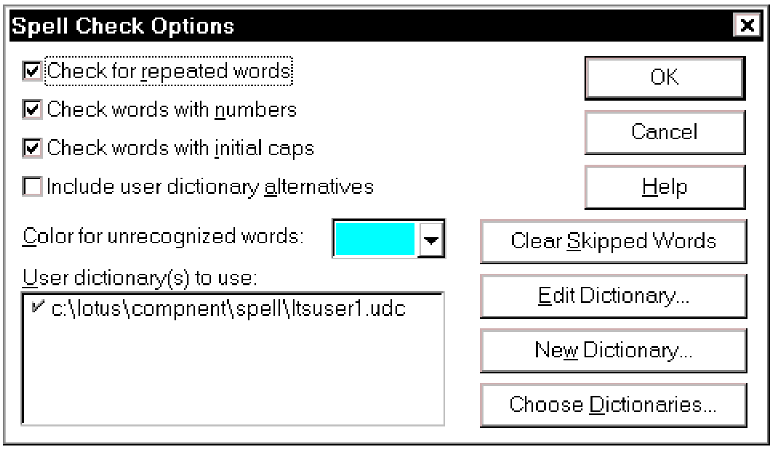


Figure 63. Choosing options for checking spelling

To set the grammar checker options to what you want:

1. On the **Edit** menu, click **Check Grammar**. The Grammar Check bar appears at the top of the document window. On the Grammar Check bar, click **Options**.

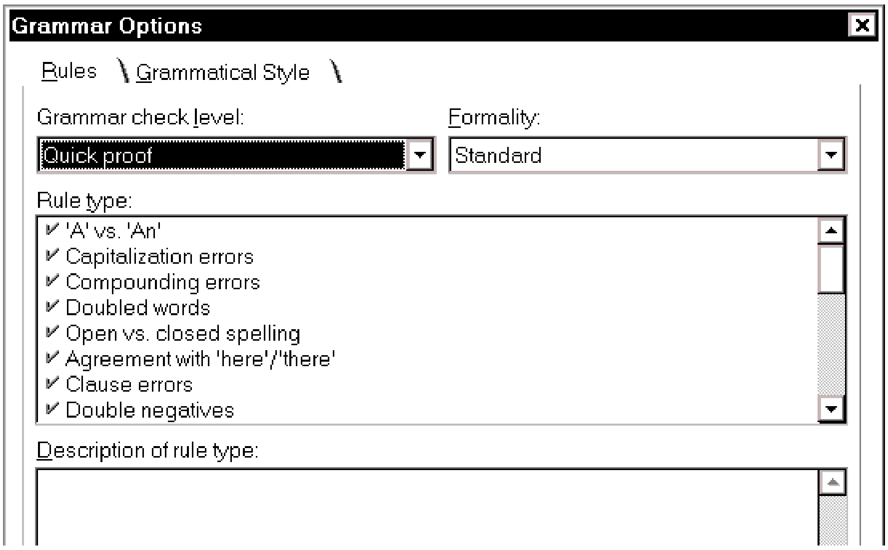


Figure 64. Choosing options for checking grammar

2. Scroll down the **Rule type** list and deselect any that you find annoying rather than useful.

Note: The default Word Pro installation does not include a number of features, including the Grammar Checker, foreign language dictionaries (for checking spelling), or various text and graphics filters. You can install any or all of these features by selecting Customized when you install Word Pro 97. If Word Pro 97 is already installed, you can run install again, select Customized Install, select Word Pro, select customize, and choose only those features you did not previously install.

If you require grammar checking data files for the various languages, look in the \EXTRA\WORD PRO\GRAMMAR directory of the SmartSuite 97 CD.

Filename	**Language**
LOTUSDE3.IPR	German
LOTUSES3.IPR	Spanish
LOTUSFR3.IPR	French
LOTUSIT3.IPR	Italian
LOTUSNL3.IPR	Dutch
LOTUSPT3.IPR	Portuguese
LOTUSSE3.IPR	Swedish

To install any of these files for use with Word Pro 97, simply copy the required language file to the \LOTUS\WORD PRO directory. Word Pro will then be able to check the grammar of those portions of your documents that are marked as being in that language.

Marking and tracking changes

Word Pro uses revision marks to show where you want text, graphics, or formatting to be added, deleted, changed, or moved. Later, the author can review and accept or reject each change.

You can use Word Pro's revision feature to edit a document that has not been prepared for review, but you may want to ask the writer to do the preparation step before sending you the file. This preparation step is called "assigning editor rights and options" in Word Pro.

- Prepare a document for editing
- Edit (review) the document

Prepare a document for editing

To assign an editor and specify editing rights:

Open the document.

1. On the **File** menu, click **TeamSecurity**.
2. On the TeamSecurity dialog (Figure 65), choose the **Editing Rights** tab, then select the editor in the **Editor's name** box.
3. In the section **When this document is being edited by**, select one or more editing rights options. An editor would usually be assigned the **All edits marked up** editing rights in the **Limited to** box.
4. Click the **Markup** button.
5. On the Markup Options dialog (Figure 66), specify the attribute, text color, and background color for insertions and deletions. (You can select the same color or a different color for deletions that you use for insertions.)
6. Specify a highlighter/comment color.
7. If you want these selections to apply to each new document, click **Make Default**.
8. Click **OK** to return to the TeamSecurity dialog, then click **OK** again.

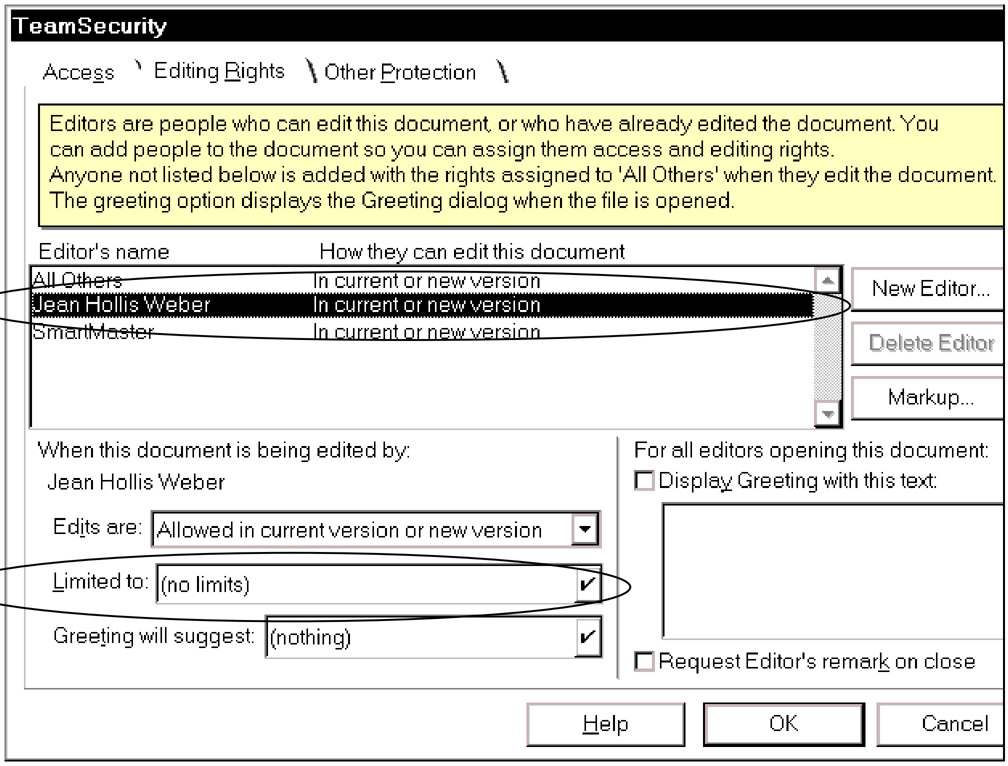


Figure 65. Specifying editing rights

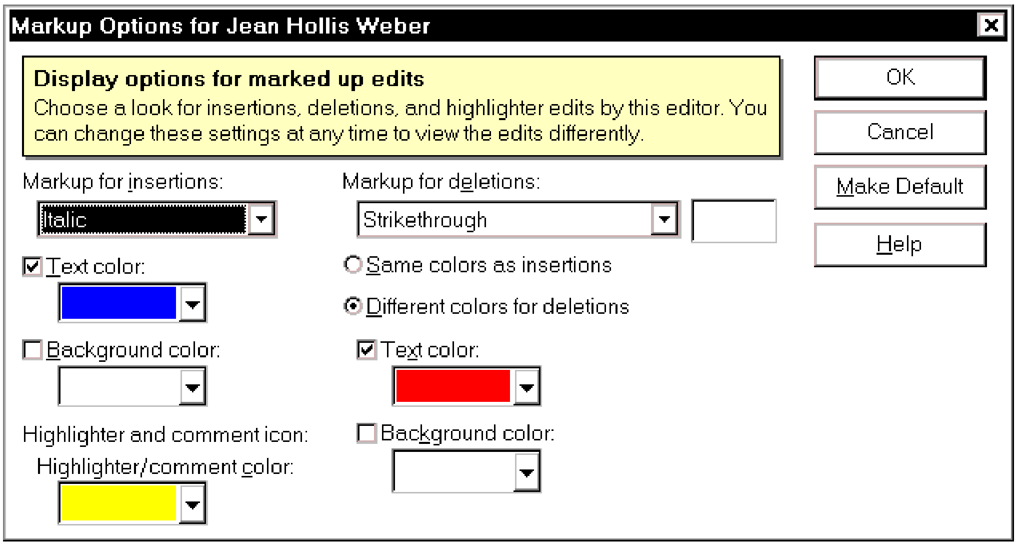


Figure 66. Specifying options for marked up edits

To set review and comment options:

1. On the **File** menu, point to **Document Properties**, then click **Document**.
2. On the Document Properties dialog (Figure 67), choose the **Options** tab, then select the required review and comment options. You can:
   - Indicate marked edits with a revision bar or other character in the margin, and specify the position of this mark in the margin.
   - Choose whether to show or hide the initials for the original editor of a comment note in the comment note mark.

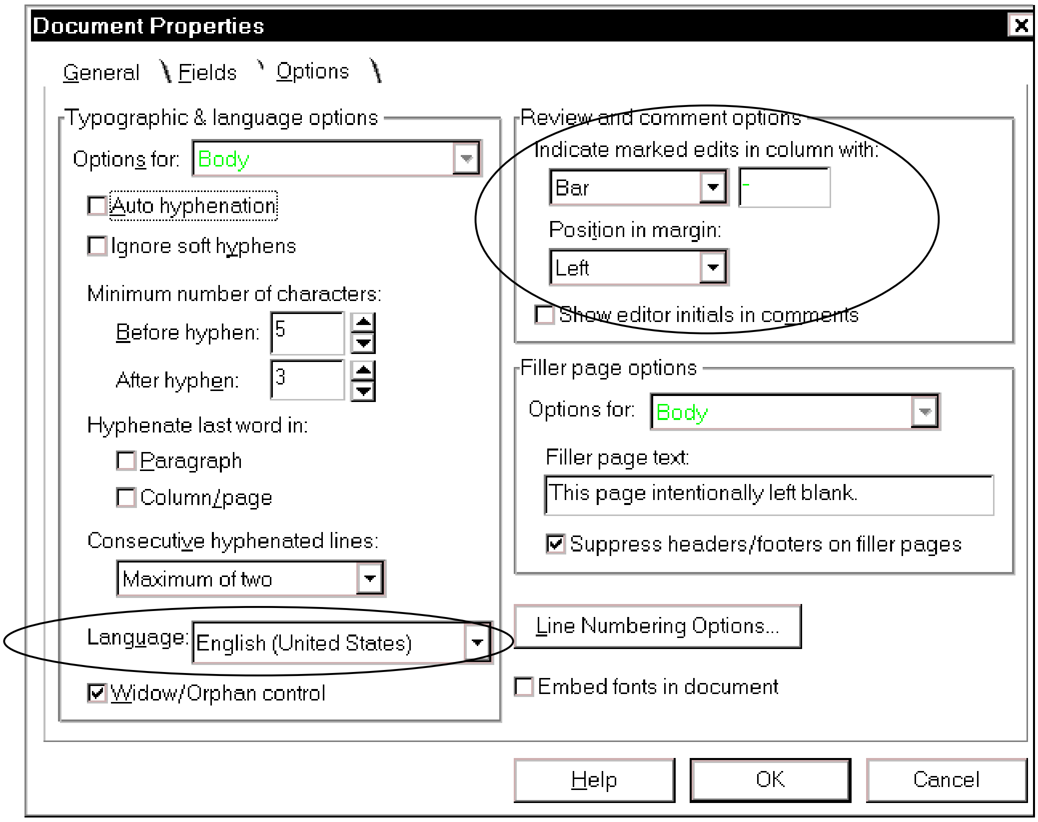


Figure 67. Specifying review and comments options

Edit (review) the document

Assuming that you have "all edits marked up" rights:

1. Open the document.
2. On the **Edit** menu, click **Markup Edits**. The cursor changes to show a small insert/delete icon at its top right-hand side.

When you make revisions, Word Pro marks them as either an insertion or a deletion using the markup options for the current editor.

Inserting comments and questions

You can insert comments and questions using a comment note, which looks like a sticky note attached to the document. You can specify the color of the note (the default is yellow).

To insert a comment:

1. Place the insertion point where you want the comment note.
2. On the **Create** menu, click **Comment Note**.
3. Type the text for the note.

   You can resize the note by clicking on the note's frame, moving the mouse pointer to any corner of the frame until the double-headed arrow appears, and then dragging the double arrow to make the frame smaller or larger.
4. To close the note, click the close box in the comment note window.

You can open a comment note by double-clicking on the colored comment note mark in the text. When a note is open, you can edit it the same way you edit any Word Pro document.

You can move or resize the comment note, as long as it stays on the same page as its comment note mark.

To show or hide the editor's initials in the comment note mark, click the **Show initials** icon on the Review & Comment Tools bar. If the toolbar isn't visible, you can display it; on the **View** menu, point to **Show/Hide**, then click on **Review & Comment Tools**.

To show or hide the comment note marks, click the **Show/Hide comment notes** icon on the Review & Comment Tools bar.

To find comment notes in a document:

1. Place the insertion point where you want to start searching for the comment notes.
2. Click the **Next Comment Note** or **Previous Comment Note** icon on the Review & Comment Tools bar.

Repeat for each note you want to find.

To delete a comment note:

1. Open the note you want to delete.
2. Right-click in the title bar of the comment note.
3. Select **Delete This Comment** from the pop-up menu.

   If you are in Markup Edits mode, the comment note remains, with a red cross through it, indicating that it has been marked for deletion; if you are not in Markup Edits mode, the comment note is deleted.

Checking spelling and grammar

Even if the author assures you that the spelling has been checked, check it again yourself. Editors know that software won't find correctly spelled wrong words, but the spelling checker can be useful for things like finding doubled words such as "the the."

This section describes some features of Word Pro that are useful for editors:

- Set the spelling checker to the correct version of English
- Override a language selection
- Mark some text to not be checked
- Recheck a document
- Create and use a custom (user) dictionary

Set the spelling checker to the correct version of English

"The correct version of English" usually isn't an issue if you and all the writers whose work you edit have your systems set up to default to the same version (either US or UK English). If you are in that situation, you can skip this section.

However, if you edit some documents requiring US English spelling and other documents requiring UK English, you may need to change a document from one to the other, or clean up after writers have re-used material that was originally written for the other version of English.

To change the language for the selected division of your document (if you haven't divided the document into divisions, this will apply to the whole document):

1. On the **File** menu, point to **Document Properties**, then click **Document**.
2. On the **Options** tab (Figure 67), select a language from the **Language** box.
3. Click **OK**.

Note: If you don't have a dictionary installed for the language you want (whether a version of English or some other language), then switching to a different language won't help; but most installations of an English-language version of Word Pro should have at least the US and UK dictionaries installed.

Override a language selection

You can override a language selection in two ways: by specifying the language to be used when checking the spelling, or by marking the text as a different language.

To specify the language when checking the spelling:

1. Select the text to be checked in a different language, or position the insertion point at the beginning of the document, if you want to change the language for the whole document.
2. On the **Edit** menu, click **Check Spelling**.
3. Click the globe icon on the Spell Check bar.
4. Select the required language from the list of languages.

To mark the text as a different language:

1. Select the text or place the insertion point at the required location.
2. Click the right mouse button and choose **Text Properties**, or choose **Text Properties** on the **Text** menu.
3. On the **Misc.** tab, select the required language from the list of languages.

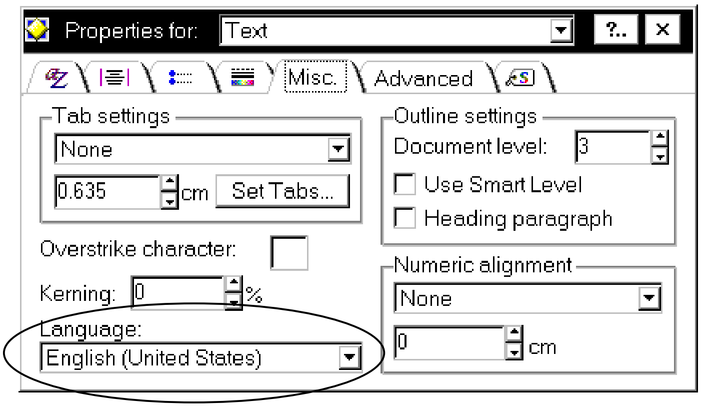


Figure 68. Choosing a language on the Text Properties dialog

Mark some text to not be checked

To mark some text (for example, lines of code or internet addresses) in the current document to not be checked:

1. Select the relevant text.
2. In **Text Properties**, on the **Misc.** tab, choose a language that you do not have installed.

If you use this trick, you'll get an error message when the spelling checker gets to the text marked this way, but when you click **OK** it will skip the text and continue checking the rest of the document normally.

Recheck a document

After you run the spelling checker over a document, if you want to check it again, Word Pro doesn't check the same material twice; it only checks new or changed material. This can be quite helpful with long documents, by saving time, but if you do want to check everything again, you'll need to do this:

1. On the **Edit** menu, click **Check Spelling**. The Spell Check bar appears at the top of the document window and any new material is checked.
2. When the message box saying "there are no more misspelled words. Would you like to close the Spell Check bar?" appears, click **No.**
3. On the Spell Check bar, click **Options**.
4. Click the **Clear Skipped Words** button, then click **OK**.

Create and use a custom (user) dictionary

Many technical writing projects include large numbers of terms that are not in the supplied dictionaries. Technical terms and product names are the most common. To make sure they are spelled correctly, you can do one of these things:

- The first time the spelling checker encounters the term in a document, click the **Skip All** button. It will then skip all other instances of the word.
- If the word is one that appears in several documents that you edit, you may wish to add it to a user dictionary. Word Pro comes with a default user dictionary called LTSUSER1.UDC. You can create as many other user dictionaries as you need. You may want separate user dictionaries for different clients, for different projects, or for different specialist topics.

To select a user dictionary to use with a document:

1. On the Spell Check bar, click **Options**.
2. The available user dictionaries are listed in the **User dictionary(s) to use** box. A check mark appears by the selected dictionaries.
3. Click on the dictionary names to select or deselect them.
4. Click **OK**.

To create a new user dictionary:

1. On the Spell Check Options dialog (Figure 63), click the **New Dictionary** button.
2. On the New User Dictionary dialog, type a name for your new dictionary, then click **OK**. (You don't need to include the file extension; Word Pro will add that for you.)
3. Back on the Spell Check Options dialog, make sure the added dictionary is selected, then click **OK**.
4. You can add words to a custom dictionary in two ways:
   - Open the dictionary (click **Edit Dictionary** on the Spell Check Options dialog) and type or paste the words, one to a line.
   - While checking spelling, click **Add to User Dictionary** on the Spell Check bar when a correctly spelled word is highlighted. The word will be added to the first selected dictionary in the list.

Finding and replacing text

Most people never learn how to use the advanced features of Find and Replace, but even the simplest search can make editing faster and easier.

- Replace specific formatting (styles)
- Find and replace paragraph marks (returns) and tabs
- Use wildcards
- Change smart quotes to straight quotes

To start, go to the **Edit** menu and choose **Find and Replace Text**. The Find and Replace bar opens at the top of the document window.

Replace specific formatting (styles)

On the Find and Replace bar:

1. Type `^p` in both the **Find** and **Replace with** boxes.
2. Click the **Options** button.
3. In the **Find options** section of the Find & Replace Text Options dialog (Figure 69), click the **Text format** button (it has an **AZ** icon on it).

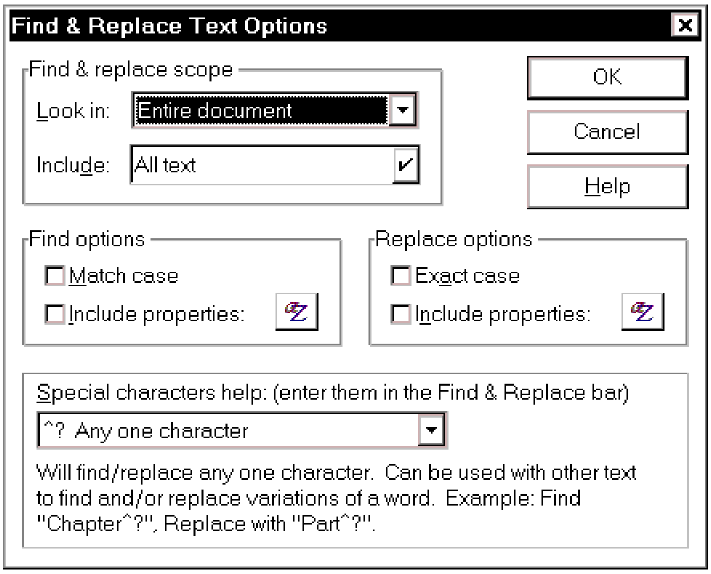


Figure 69. Choosing what to find and replace

4. On the Find & Replace Text Properties dialog (Figure 70), you can choose either:
   - Character formatting such as bold or italics and a specific font, font size, and so on.
   - A paragraph or character style.
5. To choose a style for the text to be found, select the **Style** checkbox and select the required style from the drop-down list.
6. Click the **Replace with** tab and choose character formatting or a style for the replacement text.
7. Click **OK** to return to the Find & Replace Text Options dialog.
8. Click **OK**.

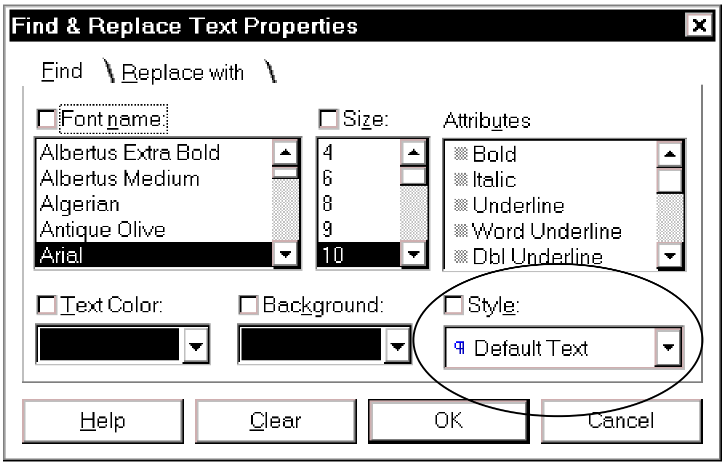


Figure 70. Choosing font attributes or style for text to be found

9. Start the find and replace process by clicking **Find**.
   - To replace one occurrence, click **Replace**.
   - To replace all occurrences, click **Replace All**.

Find and replace paragraph marks (returns) and tabs

On the Find and Replace bar:

1. In the **Find** box, type `^t` for a tab or `^r` for a return (paragraph mark).
2. In the **Replace with** box, type whatever you want to replace the tab or return.
3. Start the find and replace process by clicking **Find**.

Use wildcards

Once you get used to wildcards, you'll wonder how you ever did without them.

In the **Find** box on the Find and Replace bar, you can type:

^? for any one character

^* for any number of characters to the end of a word

^+ for any number of characters across multiple words

^p to the end of the paragraph

For more information and examples, consult the online help.

Change smart quotes to straight quotes

If the writer has enabled the SmartCorrect option for changing straight quotes to smart quotes, typing in a single quote mark (') or a double quote mark (") automatically changes the quote to the corresponding curly quotes. However, sometimes when editing a document, you want to change some of the curly quotes back to straight quotes.

Turning off the **Change straight quotes to smart quotes** option does not convert the existing smart quotes back to the keyboard quotes. You must use Find & Replace Text to find the smart quotes and replace them with the keyboard quote. To do this:

1. Select the text containing the quotes you want to change.

2. From the **Edit** menu, click **Find & Replace Text** to open the Find & Replace bar.
3. Select **Words Containing** in the drop-down box at the bottom left of the Find & Replace Bar.
4. In the **Find** box, insert the left double quote by holding down the <ALT> key on the keyboard and typing 0147 from the number pad (numlock must be enabled on the keyboard). This places a wide vertical bar in the find box (because the dialog cannot display the extended ANSI character).
5. In the **Replace** box type a regular double quote from the keyboard.
6. Click the **Find** button.
7. If the quote found is one you want to change, click the **Replace** button. If the quote is one you do not want to change, click **Find Next**.
8. Continue until you have changed all the left double quotes that you want changed.
9. Repeat steps 4-8 using ALT-0148 to change the right double quotes.

If you want to change single quotes, find ALT-0145 and ALT-0146 and replace with the single quote.

Applying and changing paragraph and character styles

If your writers aren’t using paragraph and character styles, they should be. More likely, they use styles, but they manually change (override) the styles for a lot of individual paragraphs. You may need to educate them, or clean up the mess they’ve left. Learn where the settings for paragraph and character styles are stored, how to change them, and how to recognize and fix some of the most common problems.

Note: Word Pro comes with many predefined styles. You can alter an existing style, and give the altered style a new name; you can also create brand new styles. However, you may prefer to redefine the existing styles, keeping the original names, because changing templates is easier and more effective if the same style names are used in each template.

Define a new paragraph or character style

To define a new style, you need to do two steps:

1. Manually format some text the way you want it for the new style.
2. Create a style based on the text you formatted.

To manually format text:

1. Select the text.
2. Right-click anywhere in the text and choose **Text Properties** from the pop-up menu.
3. On the Text Properties dialog (Figure 71), use the **Font**, **Alignment**, **Bullets**, **Advanced** and other tabs to format the text as required.

Your choices are applied immediately to the selected text. You can leave the Text Properties box open, select some other text, and apply formatting to it too.

To create a style based on the text you formatted:

1. Select the text you want to use as the basis for your new style.
2. Right-click anywhere in the text and choose **Text Properties** from the pop-up menu.
3. On the Text Properties dialog (Figure 71), choose the **Style** tab (it has an S in a tag as an icon).

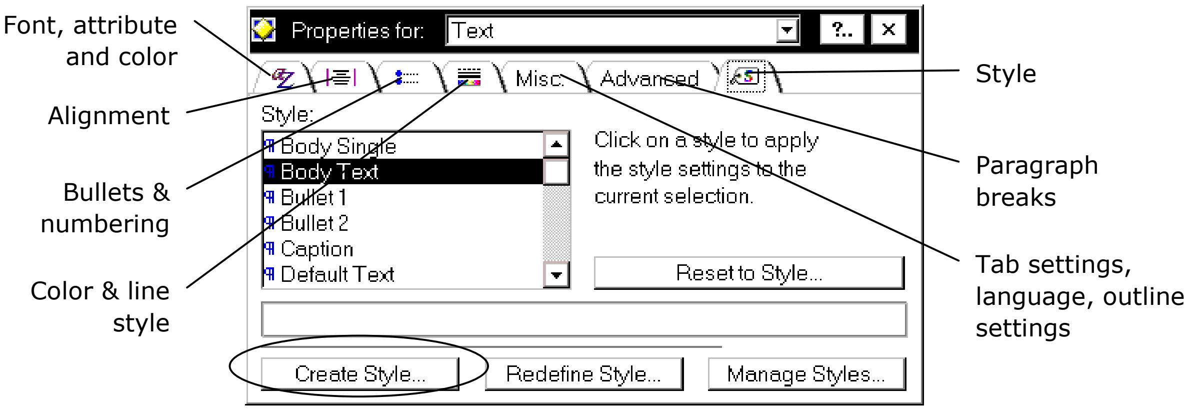


Figure 71. Managing styles with the Text Properties dialog

4. Click the **Create Style** button.
5. Type a name and description for the style in the appropriate boxes.

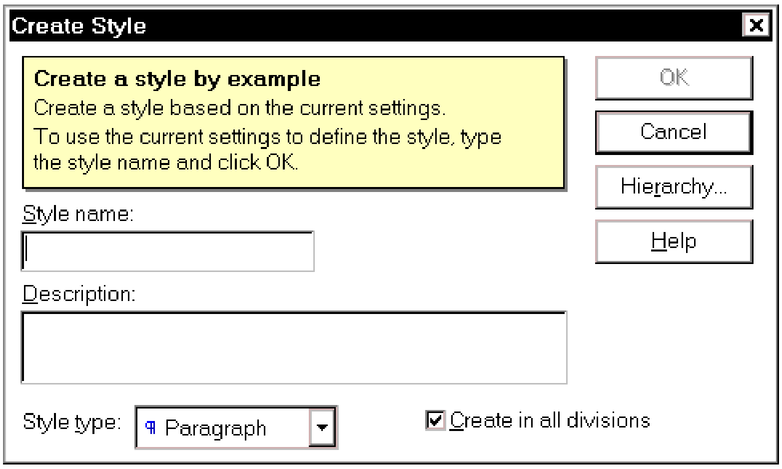


Figure 72. Creating a style by example

6. Select **Paragraph** or **Character** in the **Style type** box.
7. Click **OK**.

Notes:

1. You can define styles for pages, frames, tables, and table cells in a similar way.
2. Style names are case-sensitive. For example, Word Pro differentiates between **Heading** and **heading** style names.

Define heading numbering styles

The writer may have created one or more numbered heading styles (for example, Chapter and Appendix headings) to supplement the styles supplied. You may want to edit those styles, or define new styles.

Let's say you want to define or change the Heading 1 style (used for chapter titles) to include the word "Chapter" and a sequence number (1, 2, 3, and so on). To do this:

1. Right-click on any Heading 1 and select **Text Properties** from the pop-up menu.
2. On the **Bullets** tab, click the **Custom** button.
3. On the Custom Numbering dialog, choose the **Outline** tab, then click the **Edit** button.

Tip If you want the Heading 2 style to include the chapter number (but not the word "Chapter") and a sequence number (1.1, 1.2, 1.3 and so on), and the Heading 3 style to be 1.1.1, choose "Legal Numbering" from the Outline Numbering Sequence list before clicking the Edit button.

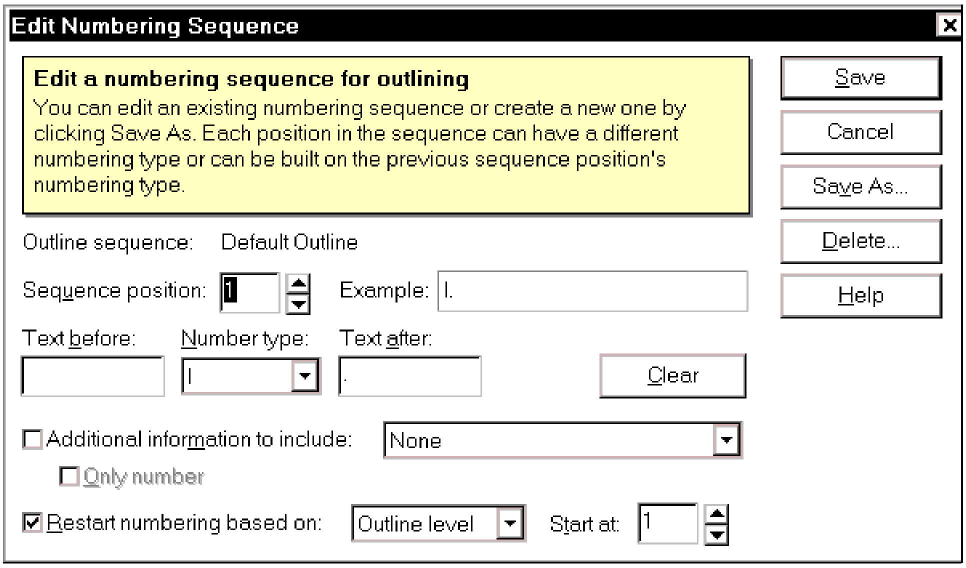


Figure 73. Editing the numbering sequence for a heading

4. On the Edit Numbering Sequence dialog (Figure 73), specify these settings:

   Sequence position: Select **1**

   Additional information: Select **None**

   Text before: Type **Chapter**, followed by a space

   Number type: Select **1**

   Text after: Type 1 or 2 spaces, or a colon and 1 or 2 spaces, or whatever characters you wish to separate the chapter number from the chapter title

5. Click the **Save As** button.
6. In the small popup dialog, type a name for the new sequence (for example, Chapter headings) and click **OK**. The Edit Numbering Sequence dialog appears. Click **Save**.
7. Back on the Custom Numbering dialog, click **OK**.

8. Follow the instructions in "Change a style definition" on page 114 to save this numbering style as part of the Heading 1 style. All headings tagged "Heading 1" will now have "Chapter x" associated with them.

If you now want to change the Heading 2 style, do this:

1. Right-click on any Heading 2 and select **Text Properties** from the pop-up menu.
2. On the **Bullets** tab, click the **Custom** button.
3. On the Custom Numbering dialog, choose the **Outline** tab, then click the **Edit** button.
4. On the Edit Numbering Sequence for Outlining dialog, specify these settings:

   Sequence position: Select **2**

   Additional information to include: Select **Number from higher position**

   Only number: Select this checkbox

   Restart numbering based on: Select **Outline level**

   Text before: Type a period (full stop)

   Number type: Select **1**

   Text after: Type 1 or 2 spaces or whatever punctuation you want to separate the heading number from the heading text

---

Tip If you plan to define the Heading 3 style as 1.1.1, leave Text after blank or you will get a gap between the 1.1 and the final .1.

---

5. Click the **Save** button (not Save As, because this style is part of the existing Chapter heading numbering system).
6. Back on the Custom Numbering dialog, click **OK**.
7. Follow the instructions in "Change a style definition" on page 114 to save this numbering style as part of the Heading 2 style. All headings tagged "Heading 2" will now have numbers associated with them.

Note: The online help instructions tell you to use the menu bar (on the **Text** menu, point to **Outline** and click **Outline Styles**) to reach the Edit Numbering Sequence for Outlining dialog (and other dialogs related to outline numbering), but the dialog you reach by that method does not show the custom sequences or correctly save anything you enter. This appears to be a bug in Word Pro, if it isn't just a problem with my installation.

Define a separate sequence for appendix headings

If your chapters are numbered "Chapter x" and you also have appendixes in the book, do not tag the appendix headings with the same heading tags; instead, create a sequence of tags called (for example) Appendix heading 1, Appendix heading 2, Appendix heading 3, with all the same attributes as Heading 1, Heading 2, Heading 3 except for the numbering sequence style.

To do this:

1. Right-click on any Heading 1 and select **Text Properties** from the pop-up menu.
2. On the **Style** tab, click the **Create Style** button.

3. Type a name (for example, Appendix heading 1) and description for the style in the appropriate boxes, select **Paragraph** in the **Style type** box, and click **OK**.
4. On the **Bullets** tab, click the **Custom** button.
5. On the Custom Numbering dialog, choose the **Outline** tab, then click the **Edit** button.

Tip If you want the Heading 2 style to include the appendix number (but not the word "Appendix") and a sequence number (A.1, A.2, A.3 and so on), and the Heading 3 style to be A.1.1, choose "Legal Numbering" from the Outline Numbering Sequence list before clicking the **Edit** button.

---

6. On the Edit Numbering Sequence dialog (Figure 73), specify these settings:

   Sequence position: Select **1**

   Additional information: Select **None**

   Text before: Type **Appendix**, followed by a space

   Number type: Select **A**

   Text after: Type 1 or 2 spaces, or a colon and 1 or 2 spaces, or whatever characters you wish to separate the appendix number from the appendix title
7. Click the **Save As** button.
8. In the small popup dialog, type a name for the new sequence (for example, Appendix headings) and click **OK**.
9. Back on the Custom Numbering dialog, click **OK**.
10. Follow the instructions in "Change a style definition" on page 114 to save this numbering style as part of the Appendix heading 1 style. All headings tagged "Appendix heading 1" will now have "Appendix x" associated with them.

Create the Appendix heading 2 style in a similar manner.

Apply a different style

To apply a different style to a paragraph:

1. Place the insertion point anywhere in the paragraph.
2. Open the **Text Properties** dialog and choose the **Style** tab (Figure 71).
3. Click on a different paragraph style in the list of styles, then click the **Reset to Style** button.

To specify a different character style for selected text:

1. Select the text.
2. Open the **Text Properties** dialog and choose the **Style** tab (Figure 71).
3. Click on a different character style in the list of styles, then click the **Reset to Style** button.

Tip You can also apply styles using two other methods:

- Click on the **Style Status** button in the status bar and select the required style from the popup list.
- Use **Fast Format** from the **Text** menu (for details, see the online help).

Change a style definition

If no style definition meets your needs, you can create a new one.

1. Select some text formatted in the style you want to change.
2. Use the Text Properties dialog to change the selected text as required.
3. Choose the **Style** tab and click the **Redefine Style** button.
4. Click **OK**.

Tip You can do the same for character styling. This is handy if you decide to change a character style of "user-entered text" from italics to bold, for example.

Applying and changing SmartMasters (templates)

Lotus SmartSuite calls templates "SmartMasters." Every Word Pro document is based on a template, which specifies the layout and styles used in the document. Templates can contain the contents of headers and footers, standard ("boilerplate") text and graphics, scripts, and more.

Determine which SmartMaster is attached to a document

1. On the **File** menu, point to Document **Properties**, then click **Document**.
2. On the Document Properties dialog (Figure 74), choose the **General** tab and look in the **Document Statistics** section for the SmartMaster.

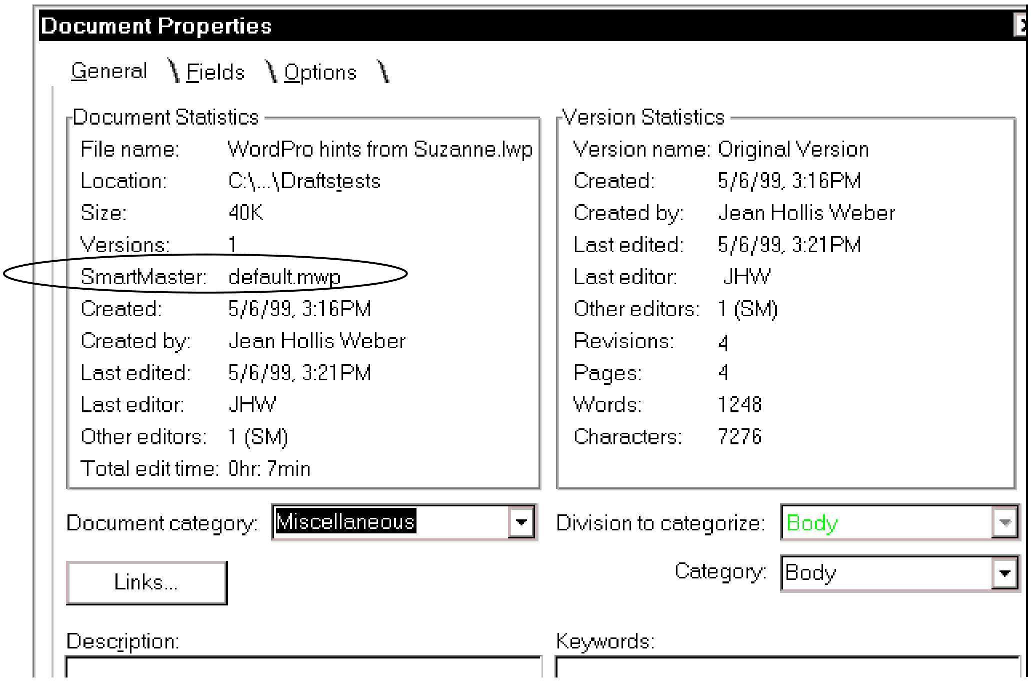


Figure 74. Determining which SmartMaster is attached to a document

Change the information in a SmartMaster

1. On the **File** menu, click **Open**.
2. Select **Lotus Word Pro SmartMaster** in the **Files of type** box.
3. Select the required file name and click **Open**.
4. Make any required changes, then save the file.

Create a new SmartMaster

The easiest way to create a new SmartMaster is to modify an existing one that is similar to what you want. You can also start with the default blank SmartMaster.

1. On the **File** menu, click **Open**.
2. Select **Lotus Word Pro SmartMaster** in the **Files of type** box.
3. Select the required file name and click **Open**.
4. On the **File** menu, click **Save As** and save the file under another name.
5. Make any required changes, then save the file.

Apply a different SmartMaster to a document

You can replace the SmartMaster that is attached to a document with a different SmartMaster. Word Pro uses the styles and page layout of the new SmartMaster, but any contents (text or graphics) from the new SmartMaster are not placed in the document. The existing contents will assume the formatting defined in the new SmartMaster.

You can apply a SmartMaster change to the entire document, the current division, or all divisions at the same level and below.

To apply a different SmartMaster:

1. On the **File** menu, click **Choose Another SmartMaster**.
2. From the list displayed (Figure 75), choose the SmartMaster you want to use, or click the **Change to Any SmartMaster** tab and make your selection.

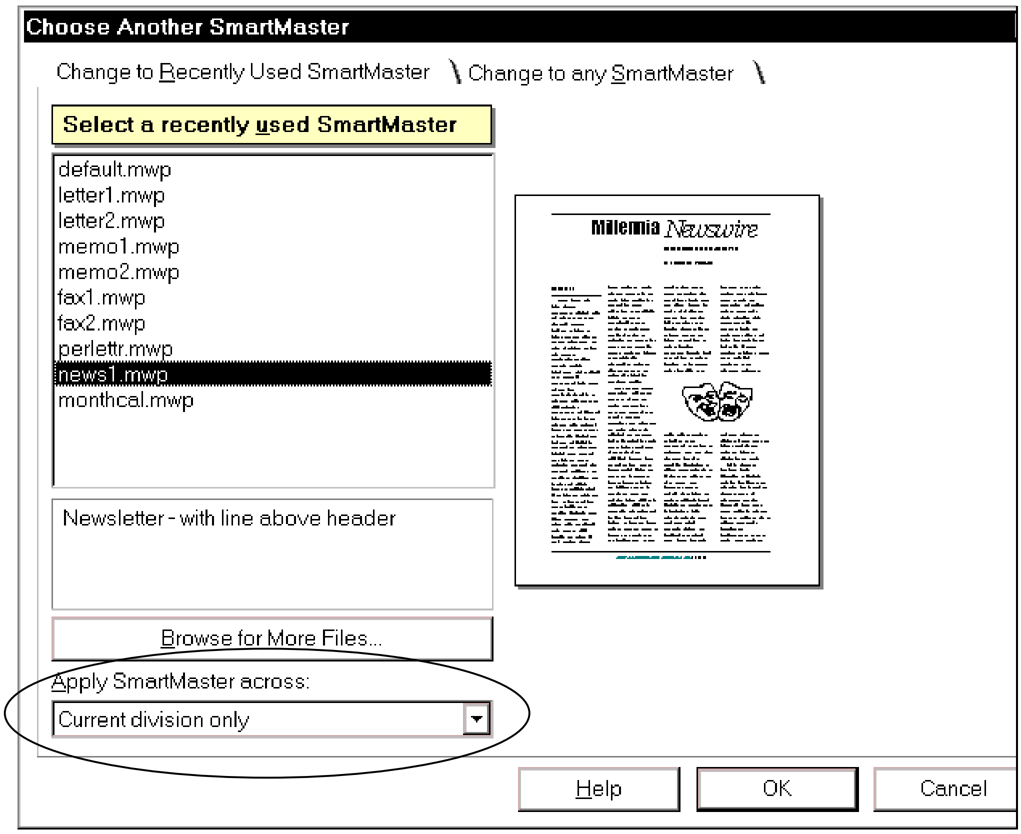


Figure 75. Choosing a different SmartMaster for your document

3. Select the scope of the SmartMaster change from the **Apply SmartMaster across** box.
4. Click **OK**.

Editing an index

To edit a Word Pro index electronically, you0 need to edit the index entries, not the generated index. Any changes you make to a generated index will be lost when the index is generated again. However, you could copy the generated index into a separate file, edit that file, and then send it to the writer, who will then make the necessary changes to the actual index entries.

I usually print and mark up the generated index, then go searching through the document looking for index entries to change. Here's a situation where the Find and Replace function comes in extremely handy.

This is what an index entry looks like:

<Index "*Primary*" # "*Secondary*" "*other*" >

Edit an index entry

First show the index entries:

1. On the **Text** menu, click **Mark Text As**.
2. Choose **Index Entry** to display the **Mark Text** bar at the top of the document window.
3. Select the **Show Index Marks** checkbox.
4. Then use Find and Replace to locate the required index entry.
5. Edit the entry, being careful not to delete the quote marks and other delimiters.

Regenerate and check the corrected index

1. On the Mark Text bar, make sure the **Show Index Marks** checkbox is deselected. This step is very important, if you want the page numbers in the regenerated index to be correct.
2. On the **Create** menu, point to **Other Document Part**, then click on **Index**.

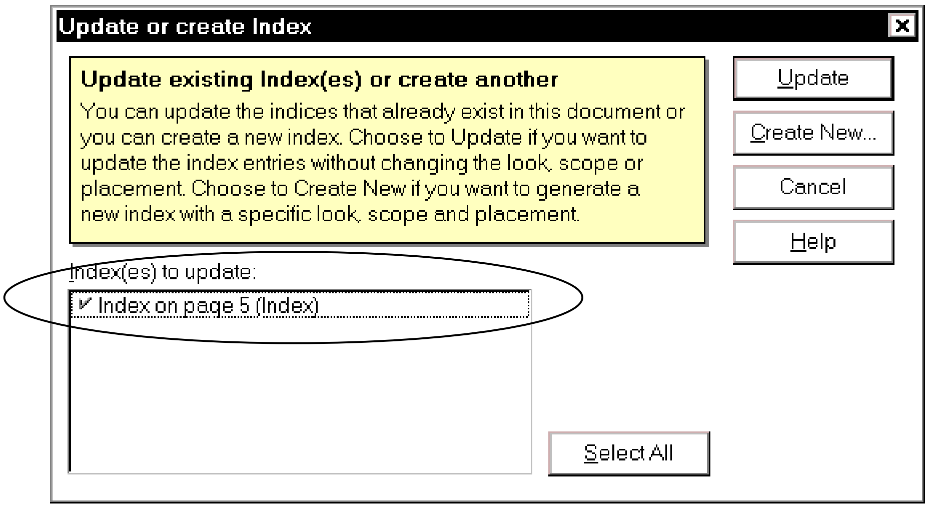


Figure 76. Choosing an index to update

3. On the Update or create index dialog (Figure 76), select the index you want to update from the list in the **Index(es) to update** box.
4. Click the **Update** button.

Note: If you want to change options for the look, scope or placement of the index, you must first delete the existing index and then recreate it using different options.

Editing a table of contents

Word Pro tables of contents are usually generated from text formatted as headings (or other styles specified by the writer) in the document. Therefore you need to edit the headings, not the generated contents list.

- If the page numbers in the existing table of contents are hyperlinks (move the pointer over a page number and see if the arrow changes to a hand), you can jump directly to the heading you want to change.
- If the page numbers are not hyperlinks, you can use Find and Replace to locate a heading.

After you edit the headings, you'll want to regenerate and check the corrected table of contents:

1. On the **Create** menu, point to **Other Document Part**, then click on **Table of Contents**.
2. Select the ToC you want to update from the list in the **Table of contents to update** box.
3. Click the **Update** button.

Note: If you want to change options for the look, scope or placement of the table of contents, you must first delete the existing one and then recreate it using different options.

Change the appearance of the table of contents

When you create a table of contents using any of the default settings, the text in the ToC will pick up the attributes from the heading styles. For example, if a heading 1 has a heavy line across the width of the text, the line will also appear in the ToC.

If this is not what you want, you need to select an appropriate SmartMaster ToC style.

If you are editing a document containing a ToC that was based on a SmartMaster, and you do not have that SmartMaster on your own system, or you fail to specify that SmartMaster when you regenerate the ToC, the ToC will lose its formatting.

Here's what to do:

1. If necessary, obtain the appropriate SmartMaster from the author and store it in the folder with the other Word Pro SmartMasters.
2. Delete the current ToC and create a new one. (On the Create menu, point to **Other Document Part**, then click on **Table of Contents**.)
3. If you get the Update or Create Table of Contents dialog, click the **Create New** button.
4. On the Step 1 tab of the Table of Contents Assistant dialog, click **SmartMaster** in the **ToC look** box. In the Choose TOC SmartMaster dialog, select the required file and click **Open**.

5. Back on the ToC Assistant dialog, make any necessary changes to the selections in Steps 2 and 3, then click **Done**.

The ToC will be recreated using the styles in the SmartMaster you selected.

Change the appearance of the page numbers in the ToC

What appears in the page numbers column of a ToC is determined by what is defined for the page numbers in the document.

Right-click on the page number in the header or footer of your document. On the pop-up menu, select **Edit Page Number**. On the Insert Page Number dialog, three boxes in the Page number options determine the look of the page numbers in the document and in the ToC. The **Text before** box is typically used for a chapter number designation such as 1-, 2-, 3- that appears before page numbers in some documents. In this case, you want that text to appear in the ToC.

Sometimes, authors will put the word "Page" in the **Text before** box, so that pages are numbered "Page 1," "Page 2," and so on. However, you may not want the word "Page" to appear in the ToC. You can easily remove "Page" from the ToC yet retain it in the document body, by doing this:

On the Insert Page Number dialog, delete the word "Page" from the **Text before** box.

Edit the document's header or footer and type the word "Page" (followed by a space) before the page number field.

Editing headers and footers

If the header and footer areas of the page are hidden, the page may look like it has no top and bottom margins. To display the header and footer areas, choose Show/Hide from the **View** menu, then click Headers and Footers.

To edit a header or footer, click in the header or footer area and edit as usual.

To specify different headers and footers on odd and even (right and left) pages:

1. On the File menu, point to **Document Properties**, then click **Page**.
2. On the Page Layout Properties dialog (Figure 77), choose the **Size & Margins** tab.

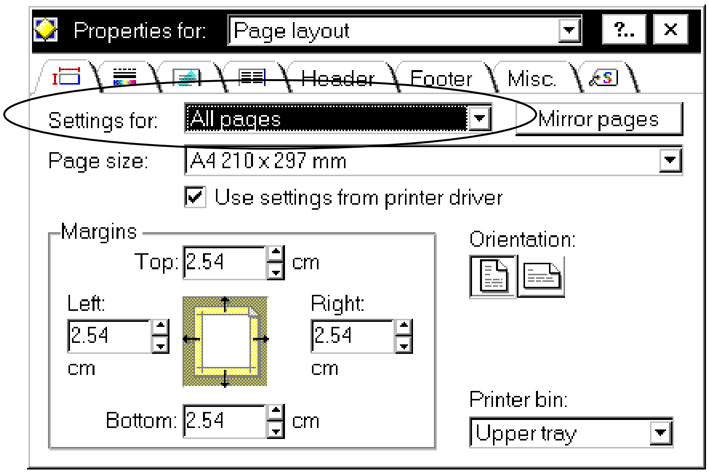


Figure 77. Specifying what pages these settings are for

3. In the **Settings for** box, select **Left pages** or **Right pages**. Click in the header (in the document itself; leave the Page Properties dialog open) and specify the contents, or leave blank.

4. Go to the next header and specify the contents, or leave blank.

To specify the page on which the header or footer begins (for example, if you want the first page or two of a document, or of a new page layout in a document, to have blank headers or footers):

1. On the Page Layout Properties dialog, choose the **Header** tab or the **Footer** tab (Figure 78).

2. Specify the page number where you want the header or footer to display in the **Begin on page** box.

   Note: if you start a new page layout on page 6 and want the header or footer to start on page 7, type 2 in the **Begin on page** box, not 7, because the header or footer starts on the second page of the layout.

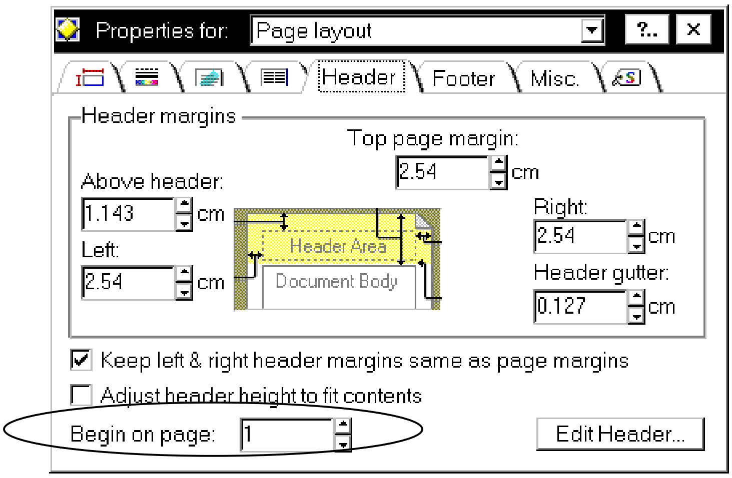


Figure 78. Specifying the first page for the header to appear

Have portrait headers on landscape pages

A common problem is dealing with a document that contains mostly portrait pages, with a section of landscape pages in the middle. If you want the headers of all the pages to print on the short side of the paper (the "top" as you're looking at the sheet of paper), follow these instructions (this is actually easier to do than to describe):

1. When you change the page layout for the landscape pages, be sure you deselect the checkboxes for **Use header text from previous page layout** and **Use footer text from previous page layout**. For example:

   a. On the Text menu, click **Insert Page Layout.**

   b. On the Insert Page Layout dialog (Figure 79), deselect the **Use header text from previous page layout** and **Use footer text from previous page layout** checkboxes.

   c. Choose **On next page** in the **Start page layout** list.

   d. Click the **Insert & Edit** button.

2. A new page is created, and the Page Properties dialog appears. Click the **Landscape** icon under **Orientation**, and adjust the margin sizes if necessary to make sure there is room for portrait headers and footers.

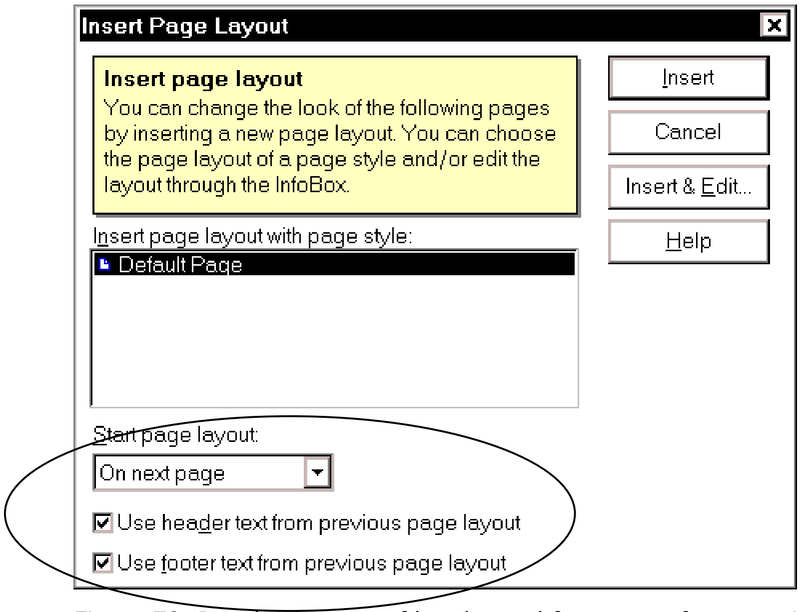


Figure 79. Deselecting use of header and footer text from previous page

3. Place the insertion point in the blank header area at the top of the landscape page.
4. On the **Create** menu, click **Frame**. On the Create Frame dialog (Figure 80), click the **Size & Place Frame Manually** button. Draw a frame in the right-hand margin of the page (which will be the top of the page in portrait orientation).

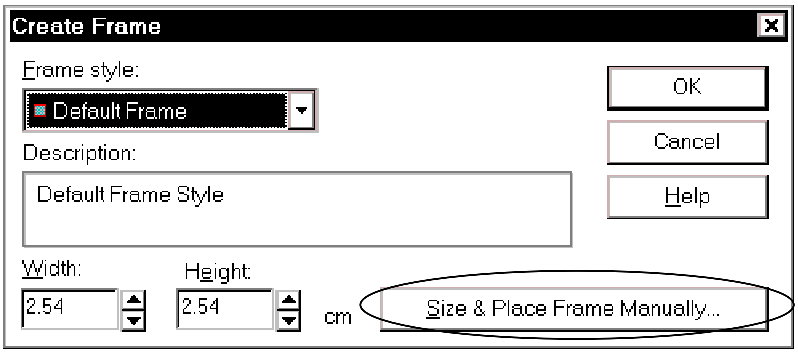


Figure 80. Creating a frame manually

5. Position the frame precisely by right-clicking on it, choosing **Frame Properties**, and specifying the placement and margins on the **Placement** tab. If you are using different headers for right and left pages, be sure to specify **On left/right pages** in the **Place frame** list.
6. On the **Misc.** tab of the Frame Properties dialog, click on the right-most icon in the **Text direction** group to rotate the text to the required orientation.
7. Type or copy the header text into this frame. Make sure the text is assigned to the same style as the other header text.
8. Repeat steps 3–7 for the footer.
9. If you're using different right and left pages, repeat steps 3–8 for the next page.

Editing footnotes and endnotes

You can edit footnotes and endnotes in Word Pro without doing anything special. However, if you want to delete a footnote completely, be sure to delete the footnote marker (number or symbol) in the body of the document, not the footnote text, or you will still have the footnote marker in the doc body, and the line at the bottom of the page, but no footnote text. When you delete the marker, the footnote text is automatically deleted as well.

Changing page layouts

To change paper size, margins, and some other aspects of page layout, point to **Document Properties** on the **File** menu, then click **Page**. You can define different page layout styles (for example, portrait and landscape) and choose one with a single click.

If your document has more than one section or division, you can change page layouts in each of them independently of the others.

Create a new section

If you want to have different settings for different parts of a document (for example, some portrait pages and some landscape pages, or single column and double column layouts), you can put the different layouts in different sections:

1. Place the insertion point where you want the new setting to take effect.
2. On the **Create** menu, click **Section**. Choose settings and click **OK**.
3. Right click in the new section and select **Page Properties**. Choose settings and click **OK**.

Changing table layouts

Word Pro's tables can serve several purposes:

- To present tables of data, similar to those you might see in a spreadsheet (sometimes these tables are imported from 1-2-3 or another spreadsheet)
- To line up material that might otherwise be lined up using tabs
- To position various page elements in columns, or line up graphics in the margin with text in indented paragraphs

In each case, you may need to change what the writer has produced. For example:

- The writer might have used a default layout (typically with columns of equal width) and may not have adjusted the columns to the best fit for the data.
- The table may be wider or narrower than is necessary. For example, tables width may default to column width, if the document is using an offset style, but the amount of data or number of columns may mean a page-width table would display the data better. In other situations, a page-width table might be better reduced to fit the text column width.
- Some tables may extend into one or both margins, for example if the table has been imported from another program.
- The style guide for the document may prescribe a table layout style that the writer has applied incorrect or inconsistently.

This section provides some tips for changing table layouts quickly:

- Fit a table to the page margins
- Adjust column widths
- Adjust row heights
- Adjust the spacing of text in a table
- Change or remove vertical or horizontal gridlines
- Change tabbed text into a table

Fit a table to the page margins

If the table placement is "with paragraph above" or "in text" (check the Table Properties if you're not sure):

1. Right-click next to the paragraph marker and select **Text Properties**.
2. On the **Style** tab, select a paragraph style with the required width (page or column).

   The table will readjust to fit the specified paragraph margins.
3. You might now need to adjust the columns to fit the data better.

If the table placement is any other choice:

1. Click anywhere in the table.
2. Move the mouse pointer over one of the edges of the table, until the pointer turns to a double-headed arrow (↔).
3. Drag the edge of the table to the required width.
4. You might now need to adjust the columns to fit the data better.

Adjust column widths

You can adjust the width of individual columns using the dialog or the mouse.

To use the dialog:

1. Right-click anywhere in the column to be adjusted and select **Cell Properties**.
2. On the **Size & Margins** tab of the Table Cell Properties dialog (Figure 81), define the column width.

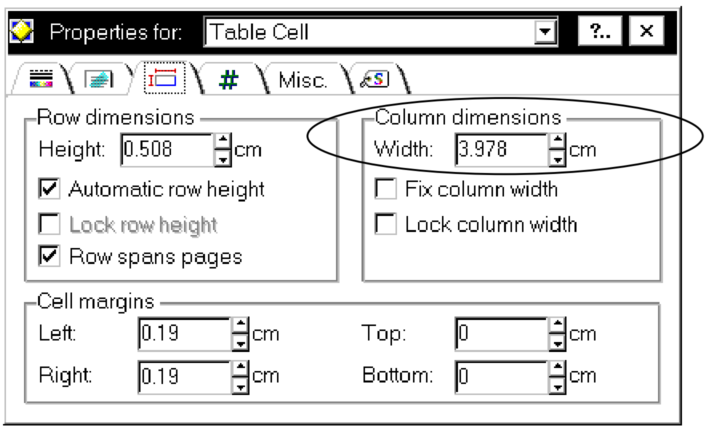


Figure 81. Defining the column width in the Table Cell Properties

3. Leaving the Table Cell Properties dialog open, click in another column. Return to the dialog and define that column width.
4. Repeat as necessary until all columns are adjusted.

To use the mouse to drag column widths:

1. Click anywhere in the column to be adjusted.
2. Position the pointer over one of the lines between the columns, until the pointer turns into a double-headed arrow (↔). Hold down the left mouse button and drag the marker to the required location.
3. If this does not work, the column width is fixed or locked. Select **Cell Properties**.
4. On the **Size & Margins** tab, deselect the **Fix Column Width** and **Lock Column Width** checkboxes.
5. Repeat step 2.
6. Repeat for other columns, as needed until all columns are the required width.
7. If necessary, return to the Table Cell Properties dialog and select the **Fix Column Width** or **Lock Column Width** checkboxes.

Note: This technique moves column margins in increments defined by the grid setting. If you need a finer adjustment, you can change or turn off the grid setting.

To change the grid setting:

1. Right-click anywhere in the column and select **Table Cell Properties**.
2. On the **Misc.** tab, make adjustments as needed to the **Grid settings** section.

Adjust row heights

You can adjust the height of the row by:

- Using the settings on the **Size & Margins** tab of the Table Cell Properties dialog
- Using the mouse to drag the row height up or down (you may need to deselect the **Automatic row height** checkbox on the **Size & Margins** tab of the Table Cell Properties dialog first)

Adjust the spacing of text in a table

To adjust the paragraph spacing of text in a table:

- Increase the height of the row.
- Change the top and bottom cell margins on the **Size & Margins** tab of the Table Cell Properties dialog.

Change or remove vertical or horizontal gridlines

To show only horizontal gridlines or only vertical gridlines, or to remove all gridlines from a table:

1. Select the table.
2. On the Table Cell Properties dialog, choose one of the grid formats on the **Lines** tab.

Change tabbed text into a table

If a writer has used tabs to put text into columns, and particularly if some lines have more than one tab between columns (because the writer used default tab stops instead of defining them explicitly), the formatting can go seriously wrong if something else is changed, for example the typeface, type size, or line length.

To change tabbed text into a table:

1. Be sure tabs are visible (see “Display paragraph marks, tabs, text boundaries and other items‟ on page 99).
2. Remove any extra tabs; you want only one between each pair of columns. (This may temporarily make the columns not line up.)

   You can speed up this process by using Replace to find two tab characters and replace them with one (see “Find and replace paragraph marks (returns) and tabs‟ on page 108).
3. Select all the tabbed text.
4. On the **Create** menu, click **Table**.
5. At the confirmation box (“Convert selected text to a table?”), click **Yes**.
6. You might then need to adjust column widths and other attributes of the table.

Using automatic cross references

If your writers have typed in references to other parts of the document, those references can easily get out-of-date if you reword a heading, add or remove figures, or reorganize sections. Replace any typed cross-references with Word Pro’s automatic ones, and when you update fields, all the references will update automatically. (If you’re making cross-references to other files, this can get a bit messy; I’m not going to attempt a full discussion on how to handle that situation.)

Ordinary cross-references within one file are easy. First you mark the information to be referenced (as Word Pro bookmarks), and then you insert a cross-reference power field where you want the reference to appear. You can create many cross reference marks before you start inserting the cross references to the marks.

1. On the **Create** menu, point to **Other Document Part**, then click **Cross Refrence**. The Cross Reference bar appears near the top of the document window.
2. Select the text (for example, a heading) to be cross referenced, then click **Mark Text to be Referenced**.
3. On the Create Reference Mark dialog (Figure 82), type a name for the mark, then click **OK**.

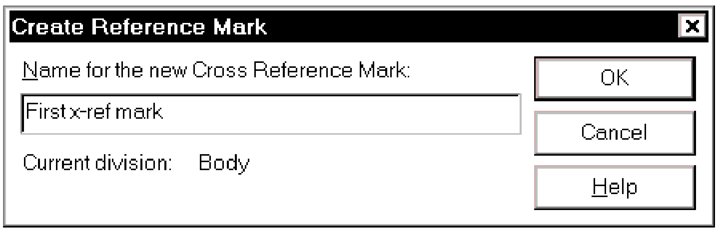
   

   Figure 82. Marking information to be referenced
4. Place the insertion point where you want a cross reference to appear, then click **Reference Marked Text**.

5. On the Insert Reference to Marked Text dialog (Figure 83), select the text to be referenced from the list displayed, choose one of the buttons in the Insert Reference As group, then click **Reference Marked Text**.

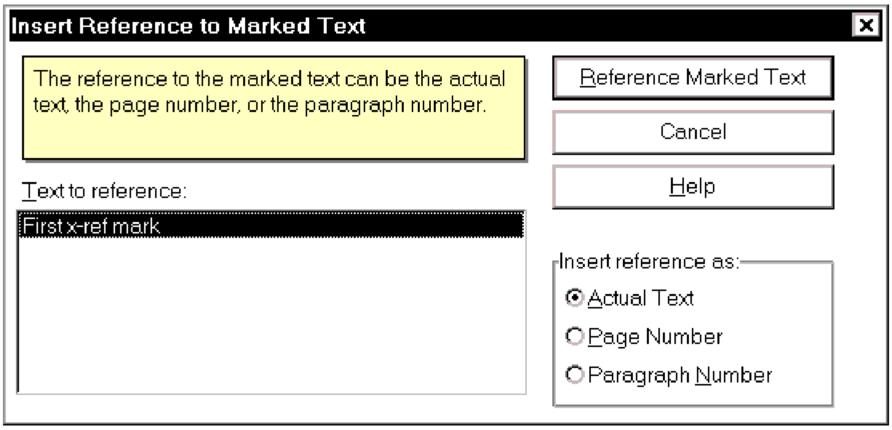


Figure 83. Inserting a cross reference to previously marked text

Editing glossary and document field entries

Word Pro's glossary feature can be used for a variety of purposes. By storing frequently used text, frames and tables as glossary entries, you can insert those elements into your Word Pro documents rather than typing or creating them each time. I won't discuss the details of creating and inserting glossary entries; if you're interested, refer to the online help.

If you edit an entry in the glossary, your changes do not affect any instance where that entry has already been used in the document. If, however, the writer used a document field rather than a glossary entry to hold and insert often-used information, then you can edit that information in one place and have all instances of its use be changed immediately in the document.

One way writers use (or should use) document fields is to hold information that is likely to change during the course of a project. For example, the name of a manager, a product, or even your entire company may change just before the document is printed. If writers have inserted the changeable information as document fields, they (or you) can change the information in one place and all the places where that field appears will be updated automatically.

Tip Word Pro does not provide a way for you to highlight fields in a document, however you can find them in several ways:

- Choose **Text - Insert Other**. Choose **Power/Doc. Field**. Use the **Next Field** and **Previous Field** buttons.
- Position the insertion point in the text; if it's a field, the cursor will jump to just before or just after the text (word, phrase, sentence, paragraph) in the field.
- With the insertion point in a field, click the right mouse button and select **Next Field** or **Previous Field**.

To create a document field (which will update automatically):

1. On the **File** menu, point to **Document Properties**, then click **Document**.
2. On the Document Properties dialog (Figure 84), choose the **Fields** tab, then click the **New** button.

3. Type a name for the field in the **Field name** box.
4. Type text required in **Contents** box, then click **OK**.

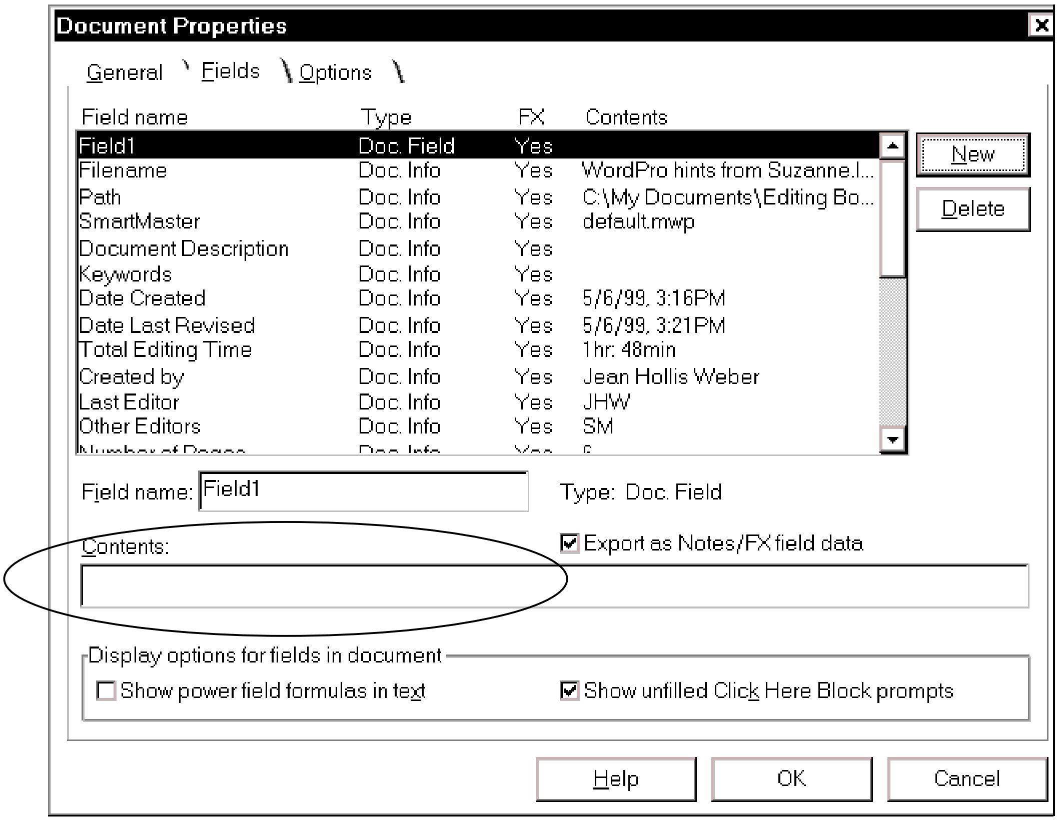


Figure 84. Creating a document field

To insert a document field into your document:

1. On the **Text** menu, point to **Insert Other**, then click **Power/Doc. field**.
2. Click **Document Field**. The list (Figure 85) shows all the document fields, including any built-in fields and your custom-defined fields.
3. Highlight the **Field name** you require and click **Insert**. The text in the **Contents** column is inserted into your document.

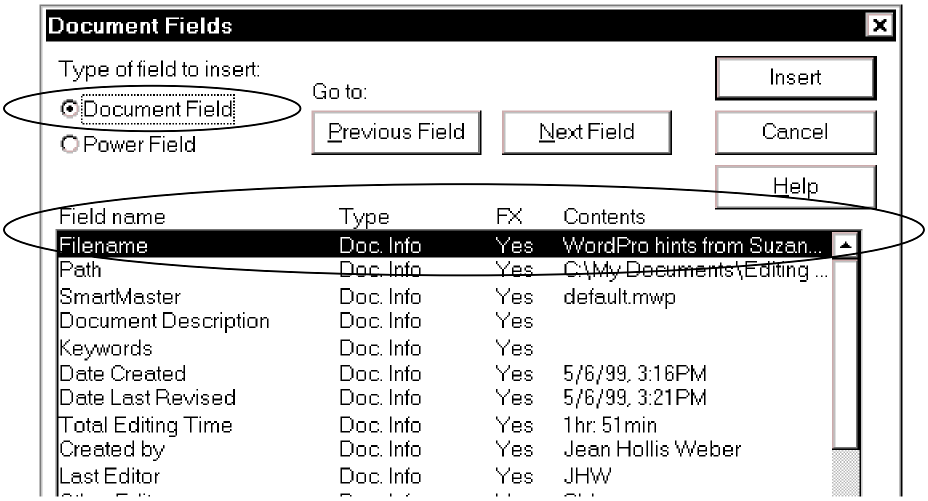


Figure 85. Inserting a document field

To change the contents of the field everywhere in the document:

1. On the **File** menu, point to **Document Properties**, then click **Document**.
2. On the **Fields** tab, select the required field in the **Field name** box.
3. Edit the text displayed in the **Contents** box.
4. Click **OK**. All instances of the field are changed in the document.

Editing or annotating graphics, including photographs and screen captures

All graphics, pictures, equations, drawings, and charts are placed in frames.

You can use one or more frames anywhere on a page, including in the margins, and can overlap frames on a page. You can add lines, shadows, corner designs, background filler, pattern, and color to a frame.

Word Pro lets you size a frame to any dimension, place it anywhere on a page, and determine the position of surrounding text in relation to the frame.

When you create a frame, Word Pro uses the "Default Frame" style. When Word Pro creates a frame automatically (for example, when you import a picture), it uses the "Default Graphic/OLE" frame style. You can use these default styles, redefine these styles, or create and apply different styles to your frames.

- Anchor the frame to the text
- Keep the caption with the figure
- Edit graphics
- Annotate graphics

Anchor the frame to the text

If you want pictures to remain in a particular place in the text (for example, a screen shot in a step of a procedure, or a little graphic in a sentence), you want the picture to act like a paragraph or a character in a paragraph.

1. Click in the frame.
2. Right-click and choose **Frame Properties**.
3. On the **Placement** tab (Figure 86), click **Placement and Anchoring Options**.

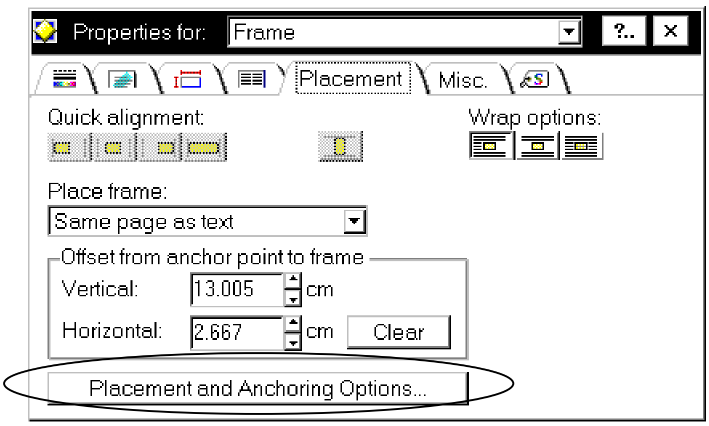


Figure 86. Choosing placement and anchoring options for a frame

4. On the Placement Options dialog (Figure 87), in the **Place frame** box, select **With paragraph above** or **In text**.

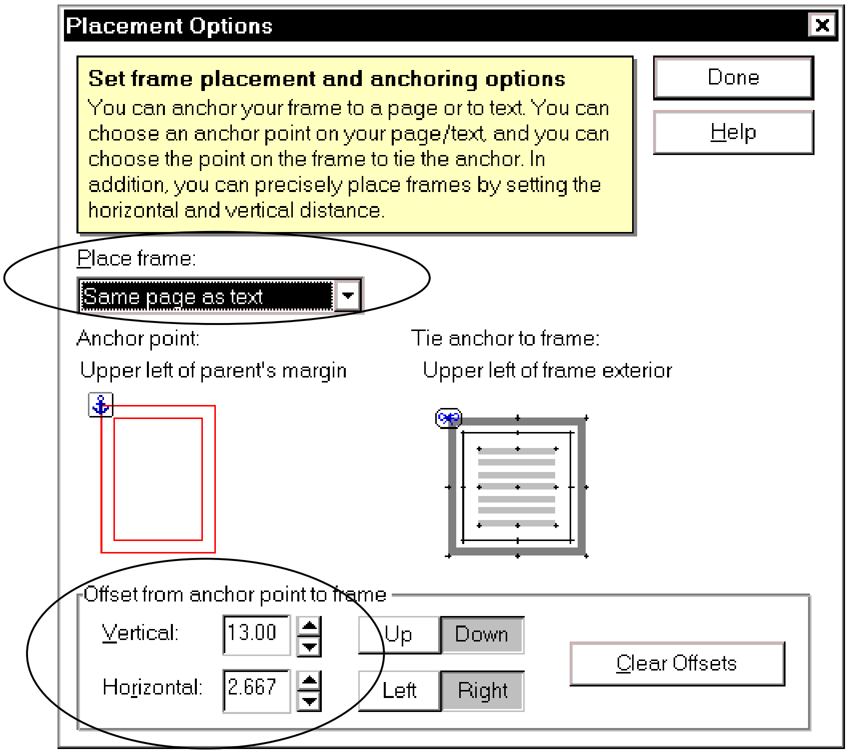


Figure 87. Specifying placement options for a frame

5. If you selected **With paragraph above**, you can specify the frame's horizontal position, but not the vertical position.
6. Click **Done**.

Tip If you have many frames to anchor to text in this way, you can speed up the process by defining a frame style and selecting it from the **Style** tab in the Frame Properties dialog.

Keep the caption with the picture

You cannot put a caption (or any text) into a frame that contains a picture. However, if the frame is anchored to a paragraph (as described in the previous section), you can keep the caption with the picture by doing this:

1. Create a style for the paragraph that contains the caption. On the **Advanced** tab of the Text Properties dialog, in the Paragraph break options section, select the **Keep paragraph** checkbox and (in the drop-down list) choose either **With next paragraph** or **With previous paragraph** (depending on the location of the caption in relation to the frame).
2. Apply this style to each picture caption paragraph.

Edit graphics

If graphics were produced using the Word Pro's Drawing tools, you can edit them directly in Word Pro. To edit other graphics, you may need to use the software that produced them (for example, PowerPoint or Visio) or you may be able to use equivalent software (for example, bitmaps, gifs or jpegs can be edited using a variety of image-editing software).

Annotate graphics

If your job as editor is not to change the graphics directly, but to comment on them (annotate them), you can use the comments feature (described in "Inserting comments and questions" on page 103) to insert those comments.

Although it is possible to use the drawing tools to create comments that point to specific parts of the graphic, learning to do this (which involves frames) is neither quick nor easy.

Accepting or rejecting editorial changes and comments

This step would normally be done by the writer, but if the writer is not experienced at using Word Pro's reviewing feature, you may need to explain how to accept or reject changes and comments.

Combine comments from several reviewers into one document

If more than one person reviews or edits separate copies of a document, the writer may wish to combine (consolidate) all of those comments and changes into one document. Word Pro provides a way to do this.

The differences between the files are marked as insertions or deletions in the markup style of the person who made the edits.

To incorporate reviewers' insertions and deletions:

1. Open the file (usually the original file, or a copy of it) to which you want to compare the other files.
2. On the **File** menu, choose **TeamConsolidate**.
3. On the TeamConsolidate dialog (Figure 88), select the files you want to compare to the current file.

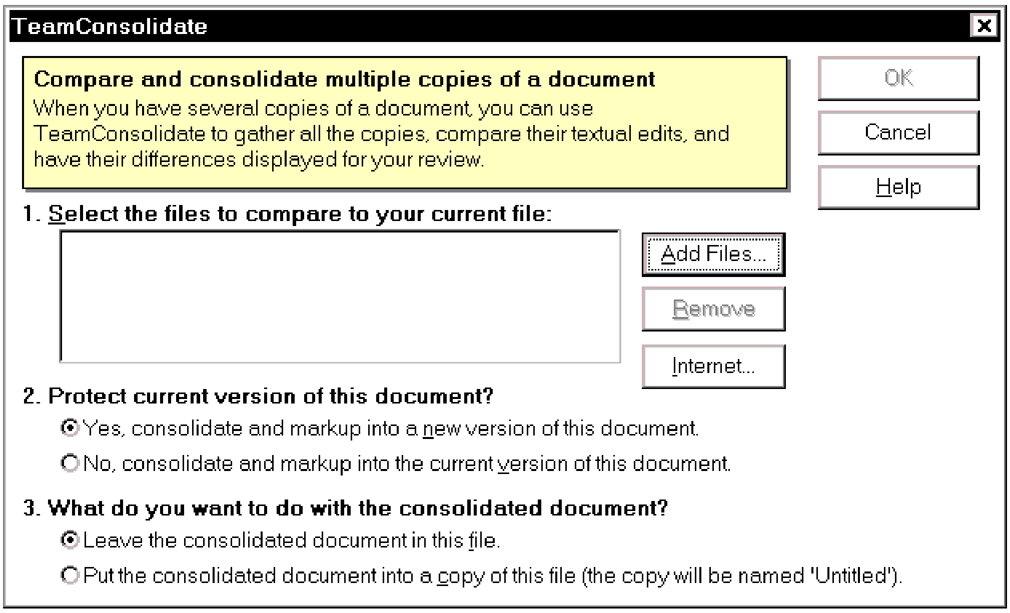


Figure 88. Consolidating multiple copies of a document

4. Select the consolidate options, then click **OK**.
5. Word Pro displays the Edit Review bar which you can use to compare and consolidate all the revisions.
6. Continue as described in "Review changes by using the Edit Review bar."

Review changes by using the Edit Review bar

If you have not used the consolidation technique described in the previous section, you can work in the edited (reviewed) file.

1. On the **Edit** menu, click **Review Marked Edits** to display the Edit Review bar.
2. Place the insertion point where you want to start, or select a block of text to check.
3. Click **Find Next** to start the review process.
4. When the first marked edit is highlighted, you have several choices. For details, see the online help.
   - Accept Edit
   - Reject Edit
   - Accept Insertion
   - Reject Insertion
   - Accept Deletion
   - Reject Deletion
   - Accept All Edits
   - Reject All Edits
5. If necessary, click **Next Edit** to move to the next marked edit.
6. Click **Done** to remove the Edit Review bar.

Incorporate reviewers' suggestions made with comments

1. Find the comment note you want to incorporate, as described in "Inserting comments and questions" on page 103.
2. Select and copy the comment text. Paste the text in the document where you want it to appear.
3. Delete the comment note or leave it to be deleted later.

Removing comments from a file

After dealing with editorial comments, and before the document is finalized, the writer should remove the comment notes.

To remove a comment note:

1. Open the note you want to delete.
2. Right-click in the title bar of the comment note.
3. Select **Delete This Comment** from the pop-up menu.

To remove all comment notes at one time:

1. Open one comment note.
2. Right-click in the title bar of the comment note.
3. Select **Delete All Comments** from the pop-up menu.
4. Click **Yes** at the confirmation message.

Finding more information

In addition to the online help, you might like to try the Word Pro User Discussion community:

http://www.support.lotus.com/freewpro.nsf?opendatabase

These discussions are intended for user to user communication. Lotus does not actively participate in these discussions.

Chapter 6
Editing using Adobe FrameMaker

Adobe FrameMaker is a powerful publishing program which is used to produce long or complex documents that word-processors such as Microsoft Word don't handle well. FrameMaker competently deals with multi-file books, numerous linked graphics, complicated numbering systems, conditional text (described later in this chapter), large tables of data, multi-column layouts, variables, cross-references, and other difficulties.

Many technical publishing departments dealing with, for example, computer software or any type of hardware prefer FrameMaker over other software in its price range. (Non-technical publishers tend to prefer Adobe PageMaker or QuarkXpress, which excel at page layout but are less able to handle some aspects of technical publishing.)

This chapter provides a brief summary of how to accomplish the following tasks using FrameMaker:

- Setting up FrameMaker to make editing easier
- Checking spelling
- Finding and replacing text
- Marking and tracking changes
- Inserting comments and questions
- Applying and changing paragraph and character formats
- Working with multi-file books
- Editing an index
- Editing a table of contents
- Changing page layouts
- Editing headers and footers
- Editing footnotes and endnotes
- Changing table layouts
- Using automatic cross-references
- Editing user variables
- Using conditional text
- Editing or annotating graphics, including photographs and screen captures
- Accepting or rejecting editorial changes and comments
- Removing comments from a file

The explanations in this chapter are for FrameMaker 5.5.6 for Windows 95/98, but other versions of FrameMaker on other platforms have similar functions.

Setting up FrameMaker to make editing easier

If you use FrameMaker a lot, you'll want to take the time to set up the interface to suit your work and your personal preferences. But even if you use FrameMaker only occasionally, you can make a few quick changes to make your work easier. Here are the very basic things I do before I get to work editing:

- Turn on backup copies
- Display paragraph marks, tabs, text boundaries and other items
- Set up the spelling options

Tip If you use FrameMaker a lot, you'll want to learn some of the many keyboard shortcuts. Refer to the Quick Reference Card, or print out a list of shortcuts from the online help.

Turn on backup copies

Unless you are very short of hard disk space, making an automatic backup copy is good insurance against major mistakes you might make (as long as you save often enough, and just before doing anything major).

1. On the **File** menu, click **Preferences**.
2. On the Preferences dialog (Figure 89), select the **Automatic Backup on Save** checkbox.

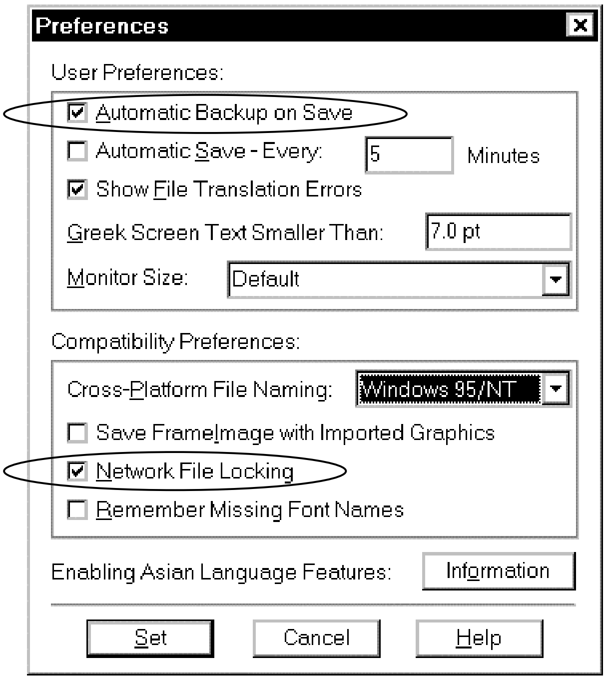


Figure 89. Selecting automatic backup of files

If you are working in Windows with files on a network, and other people (such as the author of the document) may be likely to access the files, it's a good idea to also select the **Network File Locking** checkbox.

Display paragraph marks, tabs, text boundaries and other items

Editing (and writing, for that matter) is much better done when you can see as much as possible of what's going on in your file. You need to know whether the writer has included unnecessary blank paragraphs or tabs, or made the tables or graphics too wide so they intrude into the margins of the page, so you can fix these problems.

You can show the following types of visual guides in the document window:

- Borders around text frames, graphic frames, and imported objects
- Markers, end of paragraph symbols, tabs, discretionary hyphens, and other symbols in text
- A grid of horizontal and vertical lines that provide a visual aid for drawing, placing, and resizing objects (the visible grid lines are independent of the snap grid, an invisible grid you use to align graphic objects and to position paragraph indents and tab stops precisely)

You can make pages display more quickly by turning off the display of graphics. This selection hides all imported graphics and all graphics that have been created with FrameMaker drawing tools. The graphics also do not appear in print, so you will probably want to turn them on again before printing the document.

1. On the **View** menu, click **Options**.
2. On the View Options dialog (Figure 90), select or deselect **Borders on Objects**, **Text Symbols**, **Grid Lines**, **Graphics**, and so on, to suit your preferences.
3. Click **Set**.

Note: You can also text symbols or grid lines on the **View** menu, by selecting or deselecting the appropriate choices. Check marks indicate the selected options.

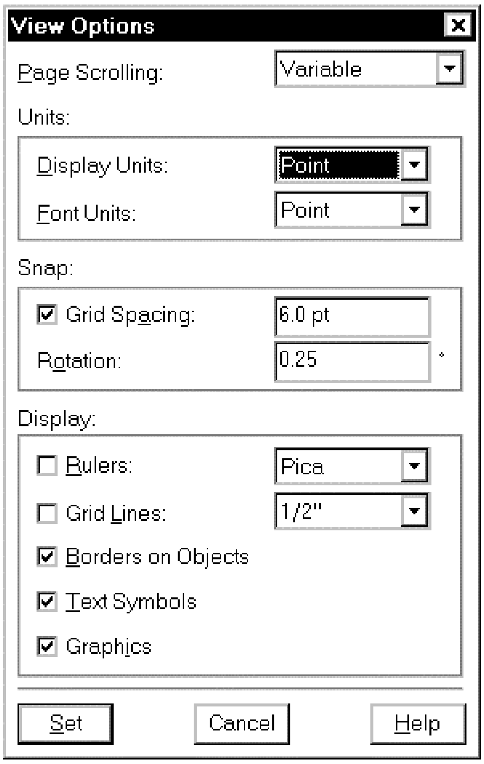


Figure 90. Selecting view options

Set the spelling options to suit your preferences

When you check the spelling in a document, FrameMaker also checks for errors that don't involve spelling; for example, repeated words, extra or misplaced spaces, or unusual capitalization. You can specify the kinds of typing errors to be checked.

You can also limit the checking so that FrameMaker overlooks certain types of words. For example, you may want to overlook words that contain numbers.

To set the spelling options:

1. On the **Edit** menu, click **Spelling Checker**, then click the **Options** button.
2. In the **Find** area of the Spelling Checker Options dialog (Figure 91), specify the kinds of typing and other errors you want to find.

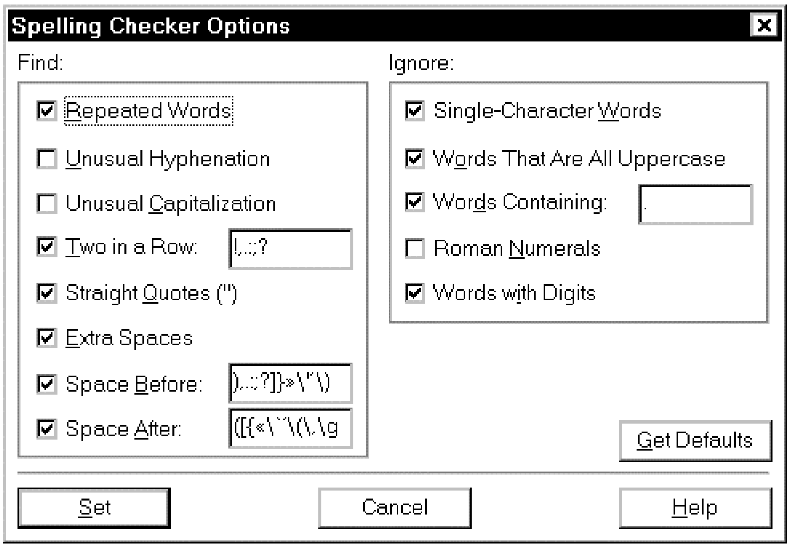


Figure 91. Selecting spelling checker options

3. In the **Ignore** area, specify the kinds of words you want to overlook.
4. Click **Set**.

Checking spelling

This section describes some features of FrameMaker that are useful for editors:

- Set the document's language to the correct version of English
- Mark some text (code or URLs) to not be checked
- Recheck material that has been checked before
- Use FrameMaker dictionaries

Set the document's language to the correct version of English

"The correct version of English" usually isn't an issue if you and all the writers whose work you edit have your systems set up to default to the same version (either US or UK English). If you are in that situation, you can skip this section.

However, if you edit some documents requiring US English spelling and other documents requiring UK English, you may need to change a document from one to the other, or clean up after writers have re-used material that was originally written for the other version of English.

FrameMaker's spelling checker uses the language specified for each paragraph when checking the document, so you need to make sure that all the paragraphs specify what you want.

To check or change the language of a document you are editing:

1. Press **Ctrl-A** to select all the text.
2. On the **Format** menu, point to **Paragraphs**, then click **Designer**.
3. On the **Default Font** page of the Paragraph Designer dialog (Figure 92), look in the **Language** box. It should show either U.S. English or U.K. English.

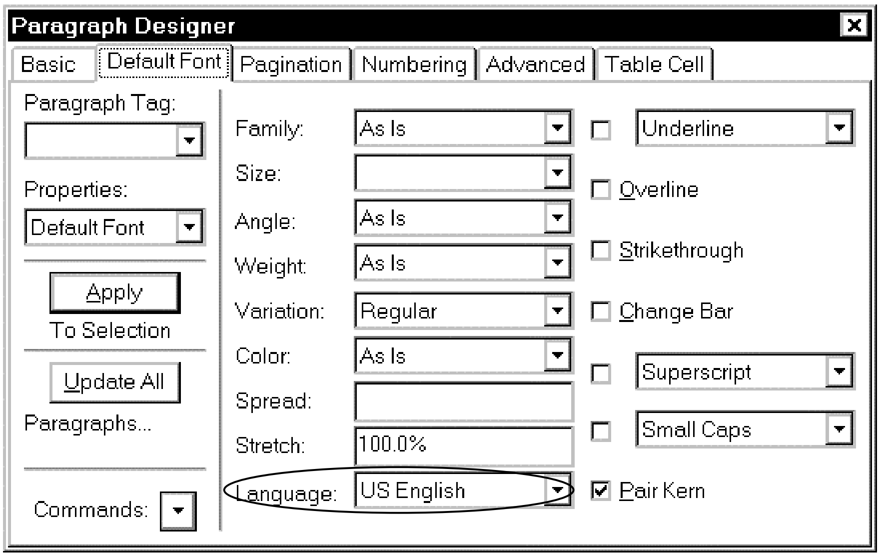


Figure 92. Specifying the language for a document

4. If you want the document to be in a different version of English, click on the **Language** list drop-down arrow, choose the required version on the list, then click **Update All**.
5. On the Global Update Options dialog (Figure 93), make sure **Default Font Properties Only** and **All Paragraphs and Catalog Entries** are selected, then click **Update**.

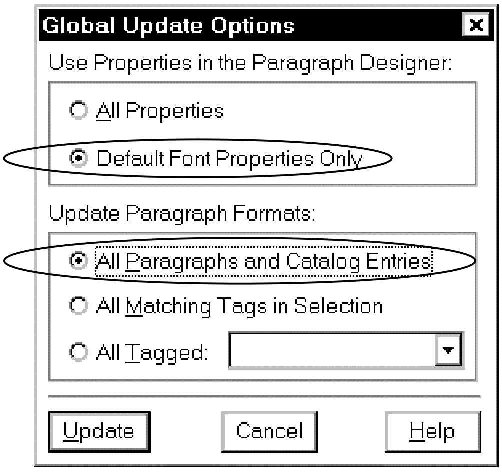


Figure 93. Specifying global update options

Note: if the **Language** box on the **Default Font** tab shows **As Is**, you have a mixture of languages defined for different paragraph formats in the document. This could be for several reasons:

- Some paragraph formats have a language defined as "none" so the spelling checker will skip them (see "Mark some text to not be checked" on page 138).
- Some paragraph formats have been defined as a language other than English (Japanese or French, for example).
- Some paragraph formats have been defined as US English and others as UK English, probably because material was copied from one document to another, and the two documents used different versions of English.

In the first two cases, you may need to check the paragraph formats individually and change only those that should be in English.

Note: The CD-ROM version of FrameMaker contains dictionaries for all supported languages. However, the default Windows version contains only a single language. For information on installing additional dictionaries, see the *Getting Started* guide.

Mark some text to not be checked

To mark some text (for example, listings of code) to not be checked:

1. Select the relevant text.
2. On the **Format** menu, point to **Paragraphs**, then click **Designer**.
3. On the **Default Font** tab (Figure 92), choose **None** on the list of languages.
4. Click **Apply** (not **Update All**) to restrict the change to the selected text.

Recheck a document

FrameMaker ordinarily rechecks only paragraphs that have been edited since the previous check. If you change options after checking a document, you may want to run the spelling checker again; if so, you need to tell FrameMaker to mark all paragraphs for rechecking.

To mark all paragraphs for rechecking:

1. On the **Edit** menu, click **Spelling Checker**. On the Spelling Checker dialog (Figure 94), click **Dictionaries**.

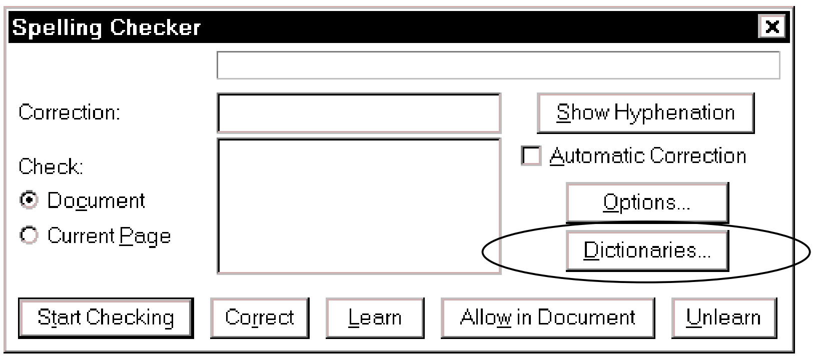


Figure 94. Choosing Dictionaries from the Spelling Checker dialog

2. On the Dictionary Functions dialog (Figure 95), select **Mark All Paragraphs for Rechecking** and click **OK**.
3. Run the spelling checker as usual.

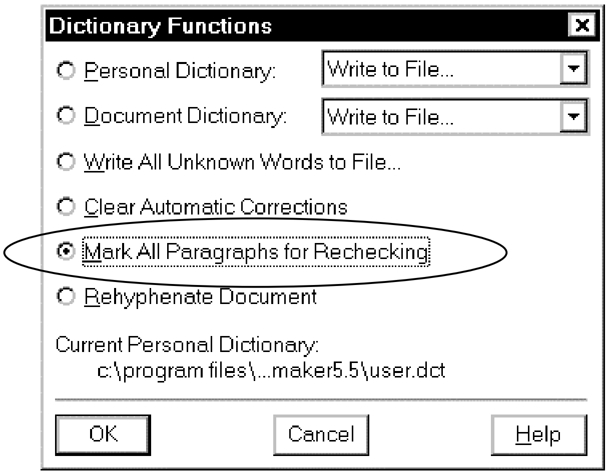


Figure 95. Marking all paragraphs for rechecking

Use FrameMaker dictionaries

Editors are often the keepers of the dictionaries for a site, project or document, so you need to understand how to work with them.

FrameMaker provides a series of dictionaries:

- The *main dictionary* contains words found in a standard dictionary. You cannot add words to or delete words from this dictionary.
- The default *site dictionary* contains some technical terms. You can add words common to your site or work group—for example, the company name and product names.

  You can specify a different site dictionary for each of several projects, among other purposes. You can also edit your site dictionary directly.

  In Windows, the site dictionary is normally named site.dict and found in the FrameMaker dict folder. To change the site dictionary, specify the required dictionary in the maker.ini file. For details, see the online manual *Customizing FrameMaker Products*. **Note:** If FrameMaker is used across a network at your site, a system administrator probably manages the site dictionary.
- Your *personal dictionary* contains words you use often. Because FrameMaker uses this dictionary whenever you check the spelling of any document, use this dictionary for words that are neither document-specific nor site-specific (for example, your name). You can add or delete words. FrameMaker automatically creates a personal dictionary for you, called by default user.dct. You can create other personal dictionaries (with different names) and switch between them.
- The *document dictionary* contains words that are acceptable in a particular document. FrameMaker uses this dictionary regardless of who is editing the document. You can add words to or delete words from it. FrameMaker automatically creates a document dictionary for each of your documents. Unlike the other dictionaries, the document dictionary is part of the document rather than a separate file.

You can add words to the personal or document dictionaries in several ways:

- When you are checking the spelling of a document
- By creating or editing the dictionary file directly
- By adding all unknown words in a document to a file
- By merging the contents of two dictionaries

To add words when checking spelling

When you are checking the spelling of a document, and you find a correctly-spelled word that is not included in any of the dictionaries

- To add the word to a personal dictionary, make sure it appears in the **Misspelling** box at the top of the Spelling Checker dialog and click **Learn**.
- To add the word to a document dictionary, make sure it appears in the **Misspelling** box at the top of the Spelling Checker dialog and click **Allow in Document**.

To create or edit a dictionary file directly

1. If you are creating a new dictionary file in a text editor or word processor, skip to step 4.
2. If you're editing an existing personal or document dictionary, first use FrameMaker to write the dictionary's contents to a file.

   On the Dictionary Functions dialog (Figure 96), select either **Personal Dictionary** or **Document Dictionary** and select **Write to File** in the corresponding drop-down list, then click **OK**.

   You will be asked for a file name, in the same way as when you use "Save As" on any file.

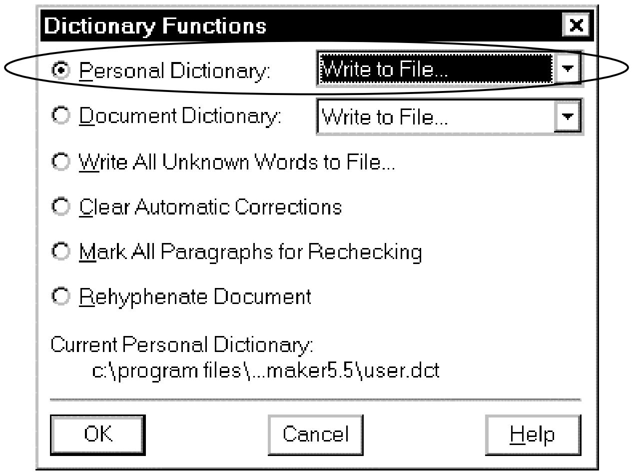


Figure 96. Choosing a dictionary to write to a file

3. Open the file you just created, using a text editor (NotePad will do), a word processor, or FrameMaker itself. If you use FrameMaker, be sure that when you open the file, you select **Treat Each Line as a Paragraph** in the Reading Text File dialog (Figure 97) and click **Read**.

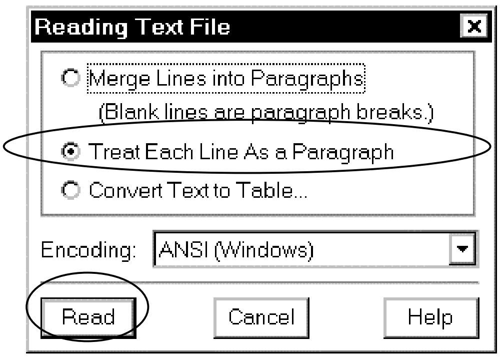


Figure 97. Reading a text file into FrameMaker

4. Edit the file. The first line must be <MakerDictionary 2.0> (including the angle brackets). Be sure each word (with a hyphen at each hyphenation point) is in a paragraph by itself.
5. Save the edited file.
   - If you use a word processor, be sure you save the file as "text only" (plain ASCII).
   - If you use FrameMaker, choose **Text Only** format. Make sure the file is named correctly and click **Save**. Then on the Save As Text dialog (Figure 98), click **Only between Paragraphs** and click **Save**.

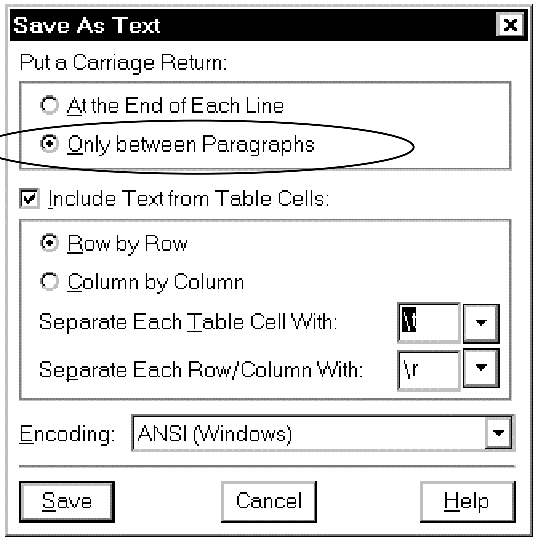


Figure 98. Saving a FrameMaker file as text

To add all unknown words to a dictionary

If your document contains many correctly spelled words that FrameMaker will question, you can expedite spell-checking by adding these words to a dictionary in a separate operation before you begin to spell-check.

1. On the Dictionary Functions dialog, select **Write All Unknown Words to File** and click **OK**.
2. Specify a filename for the dictionary file, and click **OK** or **Save**. FrameMaker creates a dictionary file that contains all the unknown words in the document. The dictionary file doesn't include typing errors such as repeated words, capitalization errors, or extra spaces.
3. Edit the dictionary file with a text editor or with FrameMaker (see "To create or edit a dictionary file directly" on page 140). Delete any words you don't want to add to your dictionary, such as misspelled words.
4. In the Spelling Checker dialog, click **Dictionaries**.
5. Choose **Merge from File** on the **Personal Dictionary** or **Document Dictionary** drop-down menu, and click **OK**. If you expect the words to appear in several documents, you should merge the words with a personal dictionary.
6. Name and save the dictionary file.

To use a different personal dictionary

1. On the Dictionary Functions dialog, choose **Change Dictionary** on the **Personal Dictionary** list and click **OK**.
2. Specify the name of the file containing the personal dictionary you want to use.

To merge dictionaries

To merge the contents of a dictionary with the current personal or document dictionary:

1. On the Dictionary Functions dialog, choose **Merge from File** on the **Personal Dictionary** or **Document Dictionary** list and click **OK**.
2. Specify the file you want to merge with the current dictionary.

Finding and replacing text

Many people never learn how to use the advanced features of Find and Replace, but even the simplest search can make editing faster and easier.

In addition to text and footnotes, you can search for any of the following items.

- **Text formats and tags.** Character format properties, or specific paragraph or character tags.
- **Markers.** Any markers regardless of their marker types, markers of a specific type, or markers that contain specified text.
- **Cross-references.** Any cross-references regardless of their formats, cross-references that use a specific format, or unresolved cross-references (those that FrameMaker is unable to update).
- **Variables.** Any variables regardless of their variable names, or specific variables.
- **Anchored frames.** You can find graphics by searching for the anchored frames that contain them.
- **Tables.** Any tables regardless of their table format tags, or tables with a specific tag.
- **Conditional text.** Any conditional text regardless of its condition tags, text with specific condition tags, or unconditional text. FrameMaker cannot find conditional table rows or hidden conditional text.
- **Automatic hyphen.** Words that are hyphenated automatically.

To search for any item

1. Click where you want to begin the search. On the **Edit** menu, click **Find/Change**.
2. On the **Find** list in the Find/Change dialog (Figure 99), choose the item (text, paragraph tag, marker, cross-reference, and so on) you want to find.

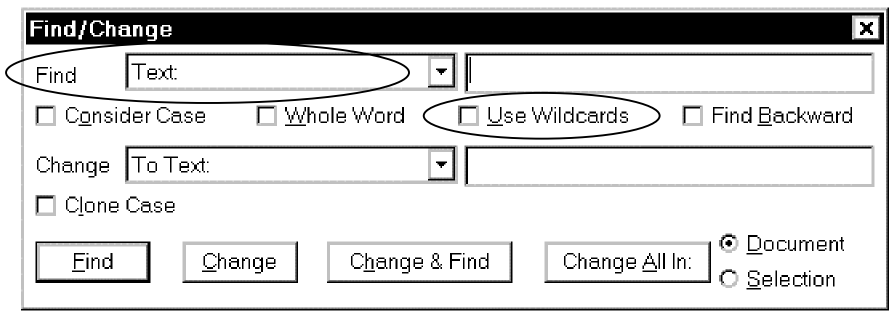


Figure 99. Choosing what to find

3. Enter text and make other relevant selections as needed. For details on all the combinations and possibilities, consult the online help.

To find an item by using wildcards, enter the text and wildcards in the **Find** box and select the **Use Wildcards** checkbox. For more information, see "Use wildcards" on page 146.

4. To replace the found item with something else, use the **Change** list and text box to specify what you want for a replacement.
5. Click **Find**. If FrameMaker finds an exact match, it displays the page that contains the item and selects the item.

After you find an item, you can change it in several ways. Generally, you find text and replace it with other text, but you can also change the character format of the found item or apply the contents of the Clipboard to the item. For example, you can copy a variable to the Clipboard and replace a word with the variable. Or you can replace a word with a graphic in an anchored frame.

You can change each occurrence of the item as it is found, or have FrameMaker automatically make the change throughout the document.

To change any item

After finding the first occurrence of the item, do one of the following:

- To change the found occurrence but not continue searching for the item, click **Change**.
- To continue searching but not change the found occurrence, click **Find** again.
- To change the found occurrence and continue searching for the item, click **Change & Find**.
- To change all occurrences of the item (not recommended), specify the scope of the change (all occurrences in the document or only the occurrences in the current selection) and click **Change All In**.

Replace specific formatting

You can search for text with specific formatting and replace it with other formatting. For example, you can search for:

- Any character format property (for example, any text in italics) and change it to another character format property (for example, bold)—useful for global changes to highlighting
- Specific properties and capitalization—useful for changing headings in all capitals to initial capitals, or for changing the name of a product from plain text to bold small capitals

To search for character format properties

1. Click in text that is currently formatted with the properties you want to find.
2. In the **Find/Change** dialog, choose **Character Format** on the **Find** list.
3. Click **Set**, and then click **Find**.

To search for specific text and character format properties

1. Copy the text with the character format you want to find.
2. In the Find/Change dialog, choose **Text & Character Formats on Clipboard** on the **Find** list. Don't type the text you want to find in the **Find** box.
3. Click **Find**.

To specify the character format properties you want to change

1. Do one of the following:
   - If you're changing several character format properties, click in text that has a character format similar to the one you want to apply to the found text.
   - If you're changing one or two character format properties, click in any text.
2. In the Find/Change dialog, choose **To Character Format** on the **Change** list, specify the character format you want to use, and then click **Set**.

   To prevent FrameMaker from applying a property to found text, set that property to **As Is**.

Find and replace paragraph marks, page breaks, and other items

You can search for any text, including single characters, phrases, and special characters that aren't on your keyboard. When you enter special characters in a dialog box in Windows, you'll need to type a backslash (\) before each one.

To find nonprinting symbols (such as tab, paragraph, and end-of-flow symbols) and positions (such as the start of a paragraph or word), use the following character sequences.

To find...	Type this sequence...
Tab	\t
Forced return	\r
End of paragraph	\p (lowercase)
Start of paragraph	\P (uppercase)
End of flow or end of table cell	\f
Start of word	\<
End of word	\>

For example, you could find empty paragraphs by searching for \P\p (beginning of paragraph followed by end of paragraph).

You can use most of these sequences for both searching and replacing—for example, replacing a forced return symbol with an end-of-paragraph symbol. However, you cannot replace with the end-of-flow, start-of-word, or end-of-word sequence.

Search for markers

FrameMaker uses markers for cross-references, indexes, conditional text, and other purposes. It can find any type of marker or just the marker type you specify. When text symbols are visible, a symbol indicates a marker.

FrameMaker can also find markers with specific marker text.

To search for a marker:

1. In the Find/Change dialog (Figure 99), do one of the following:
   - To find any marker in the document, choose **Any Marker** on the **Find** list, and leave the **Find** box blank.
   - To find a specific type of marker, choose **Marker of Type** on the **Find** list, and enter the marker type in the **Find** box.
   - To find a marker with specific text, choose **Marker Text** on the **Find** list, and enter the marker text in the **Find** box.

2. Click **Find**. If the Marker dialog is open (on the **Special** menu, click **Marker**), the marker text for the found marker appears there.

Note: You can't change marker text (such as an index entry) by using the Find/Change dialog. If FrameMaker finds the marker text you specify, and if you type different text in the **Change** box and click **Change**, FrameMaker replaces the marker—not the marker text—with the text in the **Change** box. To change marker text, use **Marker** from the **Special** menu.

Search for conditional text

You can search for visible text that has specific condition tags. When FrameMaker finds visible conditional text, it selects all adjacent text that uses these condition tags.

FrameMaker cannot find conditional table rows.

To search for conditional text:

1. Make sure that the text with the condition tags you want to find is visible. On the **Special** menu, click **Conditional Text**, then click **Show/Hide** and select the required conditions on the Show/Hide Conditional Text dialog (Figure 100).

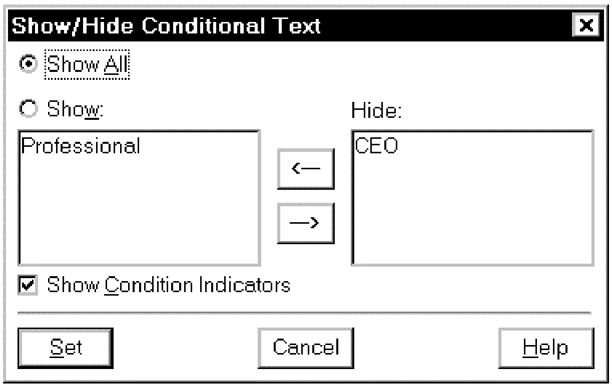


Figure 100. Choosing which conditional text to show or hide

2. In the Find/Change dialog (Figure 99), choose **Conditional Text** on the **Find** list.
3. In the Find Conditional Text dialog (Figure 101), do the following:
   - To find text with a particular condition tag, move the condition tag to the **In** list. (Highlight the tag and use the arrow buttons to move the tag to the appropriate list.)
   - To find text that doesn't have a particular condition tag, move the tag to the **Not In** scroll list.
   - If you don't care whether found text has a particular tag, move the tag to the **As Is** scroll list.
   - To find all conditional text, move all tags to the **As Is** scroll list.
   - To find unconditional text, click **Unconditional**.
   - To move a condition tag between scroll lists, select the tag and click an arrow, or double-click the tag. To move all tags from one scroll list to another, select a tag in the list and Shift-click an arrow.
4. Click **Set**, and then click **Find**.

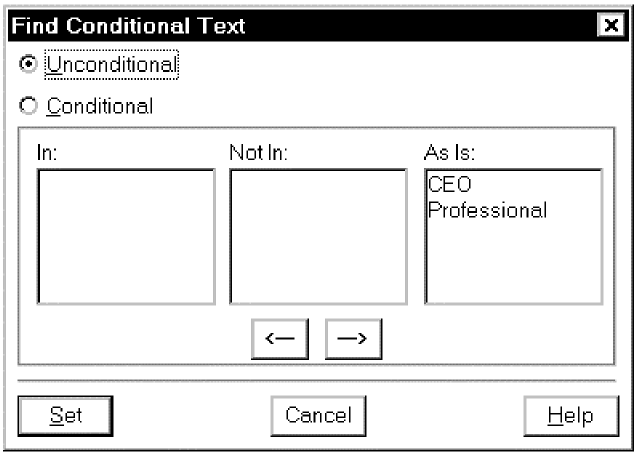


Figure 101. Choosing which conditional text to find

Use wildcards

Once you get used to wildcards, you'll wonder how you ever did without them. Most people are comfortable with some of the simpler constructions but find the more complex ones a bit daunting. I can only suggest that a bit of practice will pay off well in time saved later.

Examples of search wildcards

When the **Use Wildcards** checkbox is selected in the Find/Change dialog, you can use the following wildcards to find character patterns.

Other wildcard characters are described in the user guide and online help.

To find	Use this wildcard	Examples
Any single character	?	b?d finds "bad," "bud," "bid" and "bed."
Any string of characters	*	b*d finds "bad," "brand" and "board."
One of the specified characters	[ ]	b[iu]n finds "bin" and "bun."
Any single character in this range	[-]	[r-t]eed finds "reed," "seed" and "teed." Ranges must be in ascending order.
Any single character except the characters inside the brackets	[^]	p[^a]st finds "post" and "pest," but not "past."
Any single character except characters in the range inside the brackets	[^x-z]	b[^a-m]ck finds "bock" and "buck," but not "back" or "beck."

Marking and tracking changes

FrameMaker doesn't have the easy-to-use tools found in word processors for marking and tracking changes. If your organization, author or client requires an audit trail of all editorial changes you have made, or wants to be able to accept or reject each changes, you have several choices:

- Edit substantively before the layout phase
- Edit using character formats
- Use the document comparison facility
- Save FrameMaker files as RTF for editing
- Edit using conditional text
- Edit a PDF file

Each choice is suitable for only some situations, and some are not recommended.

Edit substantively before the layout phase

Ideally, you should be making substantive edits as early as possible in the document's development, because this makes everyone's job easier (no matter what word processor or page layout program they are using). When using a page layout program such as FrameMaker, you should also copy edit (and reviewers should conduct their reviews) before page layout. However, this ideal is often not reality.

When not to use this process. In technical publishing departments, writing and editing are often done at the same time as page layout; many documents are quite complex; and documents go through several published revisions, with changes being made to material that is already in page-layout form.

Therefore editors may not have the opportunity to work on a document in a "pre-layout" state, and they may be working with writers who do not want anyone changing their carefully crafted layout (and are able to prevent editors from doing so). If this is the case, this choice is not suitable for you.

When to use this process. In organizations where a word processor is used during the writing, review and editing phase, you can edit the file using the word-processor's revision tools (and technical reviewers can do the same). After editing and reviewing is complete, and the writer and graphic artist have made any necessary changes, the layout person brings all the pieces together into the final document.

Edit using character formats

If you don't have the opportunity to edit the files before page layout, you will probably need to edit in FrameMaker. If so, you can use character formats to mark text for insertion and deletion. The result is similar to a word processor's change-tracking feature, but it's not automatic and therefore not as quick or easy. This process works well in all situations, particularly when combined with the use of comment markers explaining the reason for the changes.

A useful set of character format tags includes "Delete" and "Add." Each format could have change bars applied, or not, as you prefer.

- "Delete" has Strikeout and a color (say, Red) turned on.
- "Add" has Underline and a different color (say, Blue) turned on.

See "Inserting comments and questions" on page 149 and "Applying and changing paragraph and character formats" on page 150 for details.

When to use this process. This technique is excellent for substantive edits and technical reviews, when you're more likely to be making comments than changing text, and the writer will be providing answers or rewriting portions of the text.

If you are required to mark every tiny copy-editing change as an addition or deletion, this process may be exceptionally time-consuming (and you're likely to forget to mark something). However, it appears to be the best of a collection of bad choices.

Use the document comparison facility

You can edit a copy of the file within FrameMaker without attempting to mark your changes. The writer can then use the document comparison facility to generate a file showing insertions and deletions, and a report summarizing the changes.

When not to use this process. The document comparison facility can have problems, especially if major changes have been made to the file, so it isn't always a good choice. Test a typical sample file before deciding to use this technique.

When to use this process. This technique can be useful if you're mainly copy-editing and not expecting (or not permitted) to make major structural changes in the document. You could use FrameMaker markers to indicate where the changes are and the reasons for them. See "Inserting comments and questions" on page 149 for more information about markers.

Use FrameMaker 5.5.6 or later. This version has the most bug fixes to the document comparison facility.

After the editor makes changes to the document, the writer can run Document Compare, comparing the original document to the editor's. The Document Compare utility supplies two new documents informing you of the editor's changes:

- A hypertext-enabled Summary Document, which lists each of the changes, its page number, and other information.
- A Composite Document, which is a conditional document containing conditional text tagged Deleted and Inserted. To create this document, Frame looks at the original document and checks what the reviewer has done. If the reviewer has removed text, Frame leaves it in the composite document, but assigns the condition tag of Deleted, and if the reviewer inserted text, it assigns the condition tag of Inserted. By viewing both of the condition tags, the writer has a view similar to that in Word when you look at all changes.

The writer can then choose to accept some or all of the changes the editor has made. See "Accepting or rejecting editorial changes and comments" on page 176 for more information.

Save FrameMaker files as RTF for editing

You can work in a word processor on an RTF (rich text format) file produced from the FrameMaker file. Because you may lose some (or most) formatting, this method is usually not recommended.

When not to use this process. You do not want to be converting complex documents from one format to another, and you especially don't want to be converting them back. The problems with preservation of formats (styles), graphics, tables, colors, variables, equations, markers, cross-references, autonumbering, and conditional text during conversions make this process more trouble than it is worth.

When to use this process. This method can work if you are dealing with documents that are not complex, or when the writer will transfer your edits into the FrameMaker document regardless of how you do your edits.

If you do choose to save FrameMaker documents as RTF files, experienced users recommend that you use the MIF2RTF filter, which does a much better conversion than FrameMaker's native RTF export and is highly customizable. See "Finding more information" on page 179 for details on obtaining this filter.

The writer may be able to convert the edited file back into FrameMaker, or may need to cut-and-paste or retype the changes into the original FrameMaker file.

Edit using conditional text

You can use conditional text to mark insertions and deletions in a similar way to using character formats.

When to use this process. The advantage of conditional text is that you can easily display only the revised (added) text and hide the old (deleted) text. Otherwise, this technique has no advantages over the character formatting technique. See "Using conditional text" on page 173 for details.

Edit a PDF file

To edit a PDF file, you must have a copy of Acrobat Exchange, which is part of the full Adobe Acrobat suite of programs. You cannot use the free Acrobat Reader to attach comments or mark up files. Adobe Acrobat 4 has more extensive editing and commenting facilities than Acrobat 3. See Chapter 7, "Editing using Adobe Acrobat" for more information.

When to use this process. Editing a PDF can be useful for layout and production edits, when you do not expect to be making many or major changes.

When not to use this process. This technique is unsuitable for most copy-editing, because you would typically be making many small changes. Not only would you have to type a lot more to explain where to make the change and what to change, but the writer would then have to copy all the changes into the FrameMaker file.

Inserting comments and questions

You can insert comments or questions to the author in two ways:

- Use the Comment marker, or create a new marker specifically for your comments.

  Your comments won't show in the text (only the marker will show), and thus they won't affect the page layout, but the author can search for and read them. The author can also generate a collection of comments (hyperlinked to the place they occur) and print them for a permanent record.

- Use a Comment condition tag, or create a new condition tag specifically for your comments.

  Your comments will show in the text if the Comment condition tag is set to Show. The comments will therefore affect the page layout when they are shown.

Insert a comment marker

1. Position the insertion point where you want the comment to appear.
2. On the **Special** menu, click **Marker**. (Or right-click and select **Marker** from the pop-up menu.)
3. On the Marker dialog (Figure 102), choose **Comment** from the **Marker Type** list, and type your comment in the **Marker Text** box.

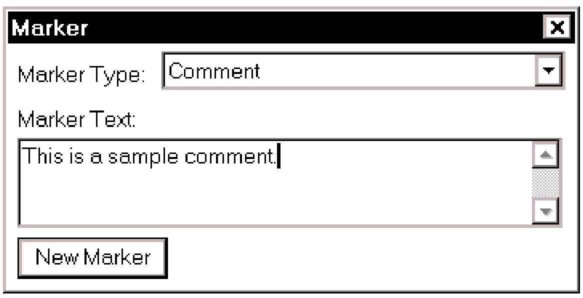


Figure 102. Typing a comment

4. Click **New Marker.** A Marker symbol appears in the text.

Edit a comment marker

1. Select the marker. The easiest way is to select the word in which the marker appears.
2. On the **Special** menu, click **Marker**. (Or right-click and select **Marker** on the pop-up menu.)
3. The comment text appears in the **Marker Text** box on the Marker dialog, and the button reads **Edit Marker** instead of **New Marker**.
4. Change your comment as required and click **Edit Marker.**

For instructions on how to generate a collection of these markers and print them, see "Incorporate reviewers' suggestions made with comments" on page 178.

Applying and changing paragraph and character formats

If your authors aren't using paragraph and character formats, they should be. More likely, they use formats, but they manually change the formats for a lot of individual paragraphs. You may need to educate them, or clean up the mess they've left. Learn where the settings for paragraph and character formats are stored and how to change them.

Each document contains a Paragraph Catalog and a Character Catalog. These catalogs, which appear in floating palettes, contain predefined formats.

The formats in the Paragraph Catalog affect whole paragraphs; the formats in the Character Catalog affect any amount of selected text—usually just portions of paragraphs.

Apply a paragraph or character format

To apply a format using a catalog:

1. Display the Paragraph Catalog by clicking the paragraph button in the upper right corner of the document window.

   Display the Character Catalog by clicking the font button in the upper right corner of the document window.

2. Select the text you want to change by doing one of the following:
   - To apply changes at the paragraph level, click in a paragraph or select several paragraphs.
   - To apply changes at the character level (typically, to portions of a paragraph), select any amount of text. (Avoid selecting an entire paragraph. If you do, the character format you apply is considered a change to the paragraph's default font.)
   - To apply changes only to the characters you are about to type, click in the paragraph without selecting any text.
3. Click a format in a catalog to apply that format to the selection.

   The Tag area on the left side of the status bar changes to show the new tag.

To apply a format using the keyboard:

1. Press **Ctrl+9** (for paragraph formats) or **Ctrl+8** (for character formats).
2. At the status bar prompt, start typing the format's tag until the name appears. (You can also use the up arrow and down arrow keys to scroll through formats.)
3. Press **Enter** to apply the format. To cancel, click in the document without pressing **Enter**.

Define a new paragraph format

Use the Paragraph Designer to define new paragraph formats.

1. On the **Format** menu, point to **Paragraphs**, then click **Designer**.
2. Click the **Commands** button in the lower left corner and select **New Format** from the pop-up list.
3. On the New Format dialog (Figure 103), type a name for the new tag, select the **Store in Catalog** checkbox, and click **Create**.

   The new format name now appears in the **Paragraph Tag** list on the Paragraph Designer dialog.

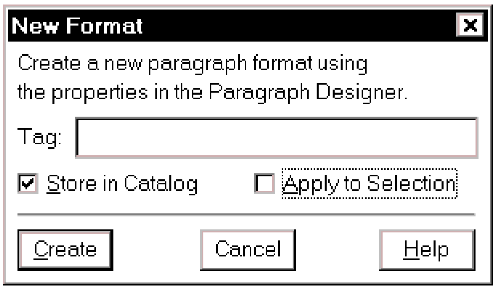


Figure 103. Creating a new paragraph format

4. Select the new format name from the **Paragraph Tag** list. Click on a tab to display the required page of formatting properties.
5. Make the changes to properties that you want. For an overview of the changes you can make, see the user guide or the online help.
6. Click **Update All**.

Define a new character format

Use the Character Designer to define new character formats.

1. On the **Format** menu, point to **Characters**, then click **Designer**.
2. Click the **Commands** button in the lower left corner and select **New Format** from the pop-up list.
3. On the New Format dialog (Figure 104), type a name for the new tag, select the **Store in Catalog** checkbox, and click **Create**.

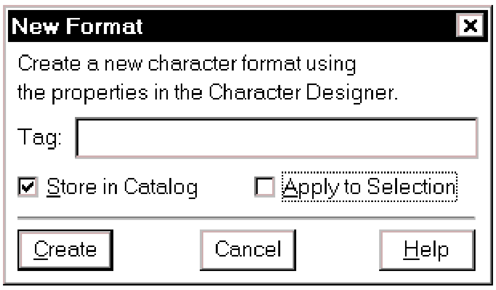


Figure 104. Creating a new character format

The new format name now appears in the **Character Tag** list on the Character Designer dialog (Figure 105).

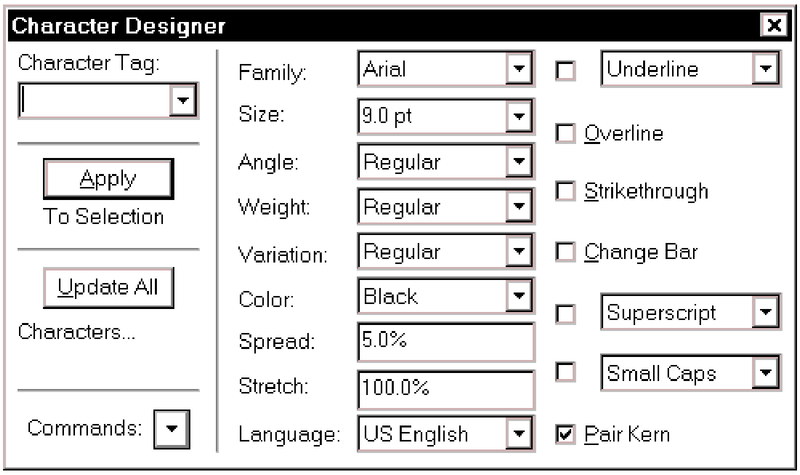


Figure 105. Defining a new character format

4. Choose the new format name from the **Character Tag** list.
5. Make the changes to properties that you want.
6. Click **Update All**.

Change a format

Use the Paragraph Designer and the Character Designer to change existing formats.

When changing fonts, keep these guidelines in mind:

- Use the Paragraph Designer to change the default font properties of an entire paragraph.
- Use the Character Designer to change the font properties of specific text within a paragraph.

To change a paragraph or character format:

1. On the **Format** menu, point to **Paragraphs** (or **Characters**), then click **Designer**.
2. Select the name of the format on the **Character Tag** list.
3. Make the changes to properties that you want.
4. Click **Update All**.

Re-apply formats to get rid of overrides

Some publishing departments do not allow the use of overrides to the defined paragraph and character formats. (Overrides are changes made to the formatting of specific text, for example to change the spacing of some paragraphs to make a section fit on a page, to change the indentation of some paragraphs, or to change some paragraphs from left-aligned to right-aligned.)

Overrides can cause problems if a different template is applied to a document, or if the formatting isn't the same in all of the chapters in a book.

The easiest way to get rid of overrides is to apply a template to a file; use the same template on which the file was based. See the discussion in "Apply a different template" on page 162, and select both checkboxes in the **While Updating, Remove** section of the Import Formats dialog (Figure 119).

If you are dealing with multi-file book, you can apply a template to all the files (or a selection of the files) in the book at the same time, as described in Make layout and formatting consistent‟ on page 154.

Working with multi-file books

One of FrameMaker's strengths is that it works well with multi-file documents. You can group several document files into a book and generate a table of contents, a table of figures, other lists, and an index.

When editing a table of contents, index, or ordinary document files in a book, you may notice problems with pagination, formatting, or what's included. For example, an appendix added at the last minute might not appear in the contents list. To correct these problems, you need to know a bit about working with book files.

Add files to a book

1. Open the book file. Right-click in the book file window and click **Add File**.
2. On the Add File to Book dialog (Figure 106), select **Document File**. Click **Browse**, select one or more files to add to the book, then click **Add**. The files to be added will be shown in the box in the Add File to Book dialog.

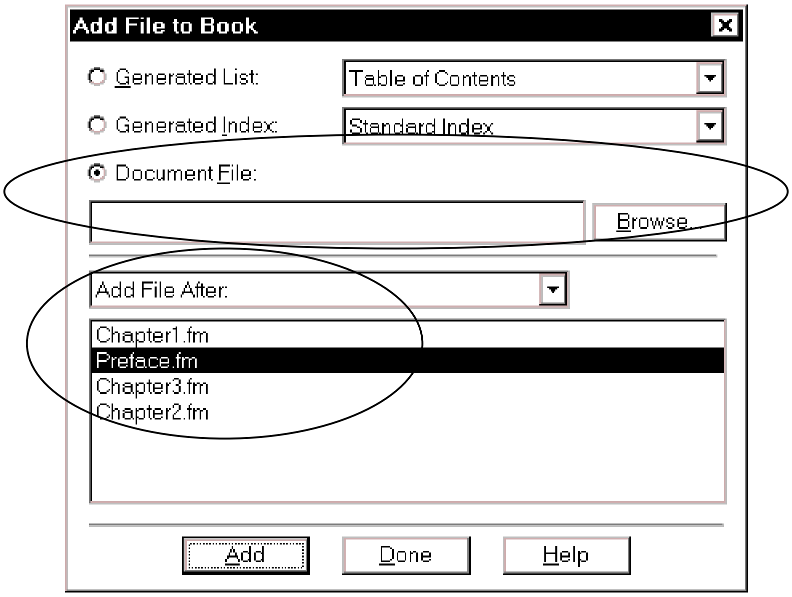


Figure 106. Adding a file to a book

3. Specify whether to add the file before or after a file selected in the list, then click **Add**. The files are added to the list in the book file window.
4. If the added file isn't in the correct place in the list, right-click in the book file window and click **Rearrange Files** on the pop-up menu. On the Rearrange Files dialog (Figure 107), select the file and click **Move Up** or **Move Down** as needed to put the files in the correct order.

Delete files from a book

1. Open the book file.
2. Select a file, then right-click and select **Delete File from Book** from the pop-up menu. (This action does not delete the file itself; it only removes it from the list of files in the book.)

You can also delete a file using the Rearrange Files dialog (Figure 107).

Tip You cannot undo this change. If you delete a file by mistake, you need to right-click, select **Add File**, and add the file again.

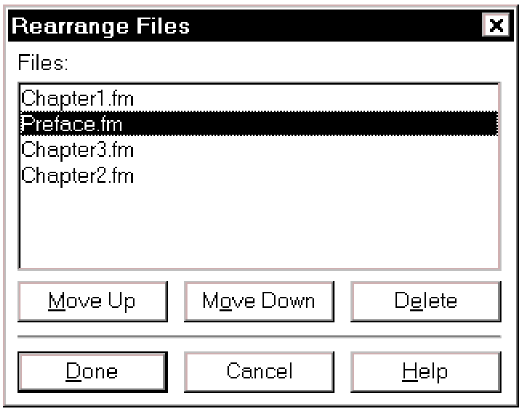


Figure 107. Rearranging the order of files in a book

Fix pagination problems

When you generate a table of contents for the book (see page 159), you may find that you need to change the page numbers. For example, you may want the preface numbered with lower-case Roman numerals (i, ii, iii) and the body of the document numbered in Arabic numerals starting with 1, but the document body may start with a higher number.

1. Open the book file.
2. Right-click on the name of the first chapter in the book, then choose **Set Up File** from the pop-up menu.
3. On the Set Up File dialog (Figure 108), choose **Restart at 1** from the **Page Numbering** list, then click **Set**.

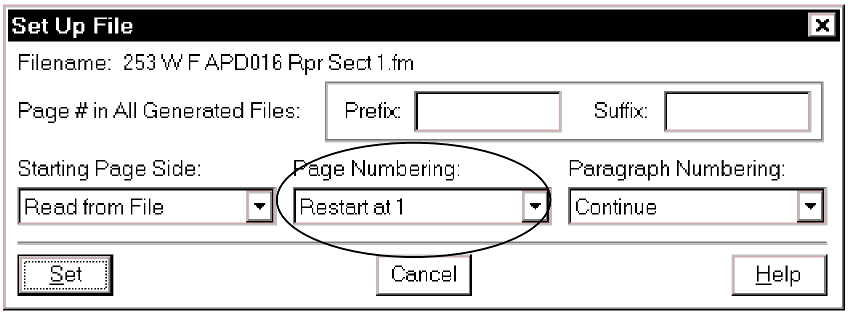


Figure 108. Specifying a starting page number for a file

To fix more complicated page numbering schemes, see the discussion on autonumbering in the user guide or the online help.

Make layout and formatting consistent

If you notice inconsistencies in the layout or formatting (paragraphs, characters, tables) of the files in book, you can apply a template to correct the problems.

1. Open the template or document that contains the layout and formatting you want to apply consistently to the book.
2. Open the book file.
3. On the **File** menu of the book file window, point to **Import**, then click **Formats**.

4. In the Import Formats dialog (Figure 109):
    a. In the **Import from Document** list, choose the file with the formats you want to import.
    b. Specify the files you want to change, by moving them to the **Update** or **Don't Update** lists.
    c. Select the checkboxes for settings you want to import and update.
    d. Select both checkboxes in the **While Updating, Remove** section.
    e. Click **Import**.

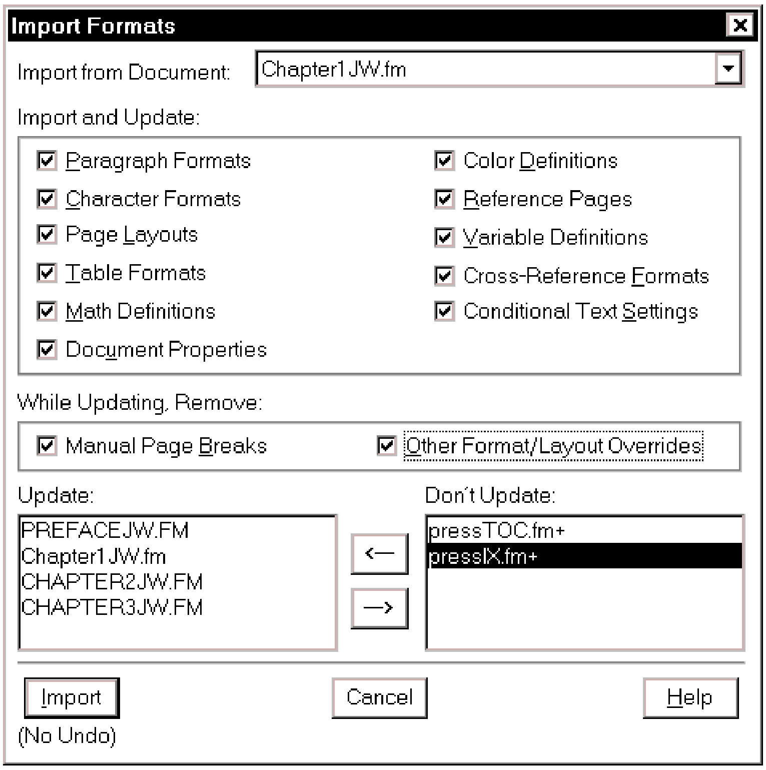


Figure 109. Importing formats to several files in a book

5. Save any open files, to make sure the updates are effective.

Editing an index

You may need to make different types of changes to an index:

- Regenerate an index
- Add new index entries
- Change existing index entries
- Delete existing index entries
- Change the appearance (formatting) of the index

FrameMaker indexes are generated from marker text (tagged as index entries) in the document. To edit a FrameMaker index electronically, you need to edit the index entries, not the generated index. Any changes you make to a generated index will be lost when the index is generated again.

- If the page numbers in the generated index are hyperlinks, you can jump directly to the index marker you want to change.

- If the page numbers are not hyperlinks, you can either regenerate the index using hyperlinks, or use Find/Change to locate an entry.

Tip For assistance in finding and fixing indexing errors, see “Troubleshooting indexes” in the user guide or the online help.

Regenerate an index

The steps for regenerating an index vary slightly depending on whether the document is in one file or several files (combined into a book).

Before regenerating an index, make sure the display of unwanted conditional text is turned off. This step is very important, if you want the index entries and page numbers in the regenerated file to be correct.

To regenerate the index for a single-file document

1. Open the document.
2. On the **File** menu, click **Generate/Book**
3. On the Generate/Book dialog (Figure 110), select **Index**.

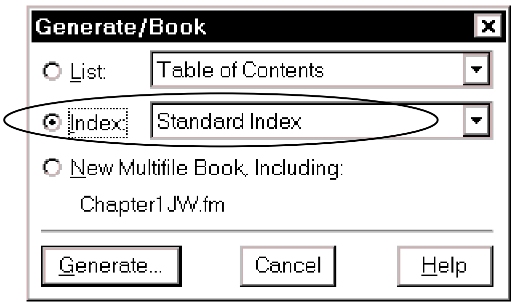


Figure 110. Generating an index

4. Click **Generate**. The Set Up Standard Index dialog (Figure 111) appears.

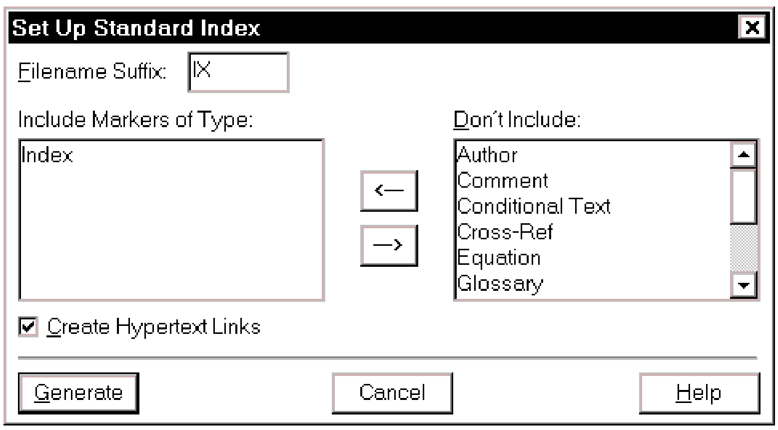


Figure 111. Setting up the index

5. If necessary, change the list of markers to be included in the index, and select or deselect the **Create Hypertext Links** checkbox.
6. Click **Generate**. The generated index replaces any previously generated index for the document.
7. Save the generated file.

To regenerate the index for a multi-file document

1. Open the book file for the document.
2. If you **do not** want to make any changes to the headings included in the index, or whether the entries are hypertext links, skip to step 4.

   If you **do** want to make any changes to the index, or whether the entries are hypertext links, right-click on the name of the index file and click **Set Up File** from the pop-up menu.
3. On the Set Up Standard Index dialog (Figure 112), make any necessary changes, then click **Set**. You return to the book file window.

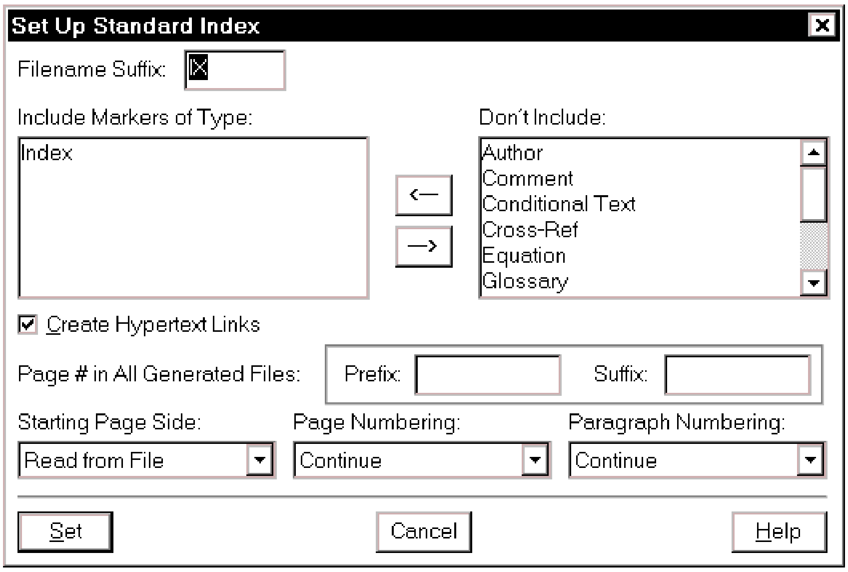


Figure 112. Changing the setup for an index for a book file

4. Right-click on the index file and click **Generate/Book** from the pop-up menu.
5. On the Generate/Book dialog (Figure 110), select **Index**, then click **Generate**.
6. Save the generated file.

Add a new index entry

1. Open the document file. On the **View** menu, click **Text Symbols** to display markers.
2. In the document file, position the insertion point where you want the index entry to be located (usually just before or after the words to be indexed), or select the text you want to appear in the index entry.
3. On the **Special** menu, click **Marker**. In the Marker dialog (Figure 113), make sure Index is chosen in the **Marker Type** box. Type the index entry in the **Marker Text** box, or change the text that appears there.

   You can indicate a subentry by typing a colon (:) between two index terms or phrases, for example **index entry:creating**. Then click **New Marker**.
4. Leave the Marker dialog open, return to the index window, and repeat steps 2 and 3 for the next entry that you want to add. Continue until you have added all the index entries, then close the Marker dialog.

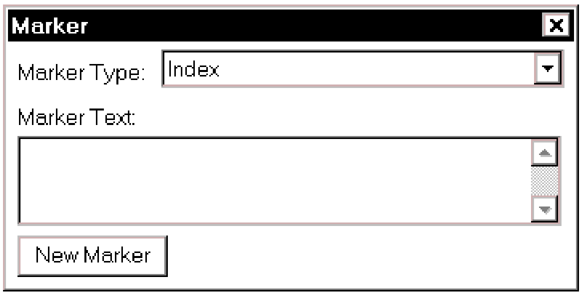


Figure 113. Creating a new index marker

Find and change the source of an index entry by using a link

1. If you did not select Create Hypertext Links when you generated the index, select this option and regenerate, as described in "Regenerate an index" on page 156.
2. On the **Special** menu, click **Marker**. The Marker dialog (Figure 114) opens.
3. In the generated index, press and hold **Alt+Control** and click on a page reference in the index.

   FrameMaker opens the source document to the page that contains the corresponding index marker and selects it. The marker text appears in the Marker dialog (Figure 114).

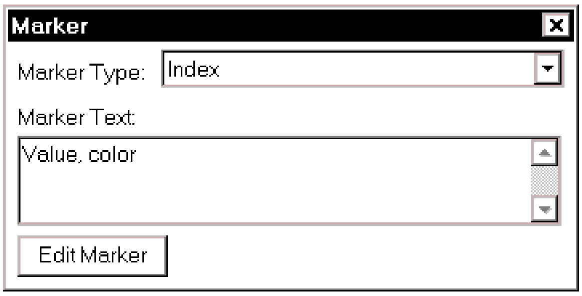


Figure 114. Editing an index marker

4. Change the marker text as needed, then click **Edit Marker**.
5. Leave the Marker dialog open, return to the index window, and repeat steps 3 and 4 for the next entry that you want to change. Continue until you have made all your corrections, then close the Marker dialog.

Find and change the source of an index entry by using Find/Change

1. On the **Special** menu, click **Marker** to open the Marker dialog (Figure 114).
2. In the source document (not in the generated index), on the **Edit** menu, click **Find/Change**.
3. Choose **Marker Text** on the **Find** list. Type the index entry text.
4. Click **Find**.
5. Change the marker text as needed, then click **Edit Marker**.

Tip Do **not** change the index text in the **Change text** box and click **Change**, because FrameMaker will replace the marker—not the marker text—with the text in the **Change text** box. If you open the Marker dialog first, you'll be less likely to edit the wrong text.

Delete an index entry

Select the marker and press **Delete**.

Do not delete the marker text and leave the marker, but be careful when deleting markers that you delete the right one (if more than one are located in the same place in the text).

Change the appearance of the index

In the index file (not the document file from which the index was created), change paragraph and character formats and page layout as needed. See "Applying and changing paragraph and character formats" on page 150 and "Changing page layouts" on page 161 for more information.

Editing a table of contents

You may need to make several different types of changes to a table of contents:

- Correct errors in the words in the headings
- Change the appearance (formatting) of the table of contents
- Add or delete heading levels to be included
- Perform other troubleshooting, such as removing entries with a page number only (no words)

FrameMaker tables of contents are usually generated from text tagged as headings (or other tags as specified by the writer) in the document. Therefore you need to edit the headings or other text in the source document, not the generated contents list.

- If the page numbers in the existing table of contents are hyperlinks, you can jump directly to the heading you want to change.
- If the page numbers are not hyperlinks, you can either regenerate the table of contents using hyperlinks (see "Regenerate a table of contents"), or use Find/Change to locate a heading.

After you edit the headings, you'll want to regenerate and check the corrected table of contents. First make sure the display of unwanted conditional text is turned off. This step is very important, if you want the entries and page numbers in the regenerated table of contents to be correct.

Tables of contents, tables of figures, and other generated lists are in separate files from the main document. If you need to change the formatting of a table of contents (for example, if the font size of the Heading 2 TOC entries is incorrect, or the dot leaders are missing from the Heading 1 TOC entries), you need to do this in the TOC file.

Tip For assistance in finding and fixing errors, see "Troubleshooting TOCs and lists" in the user guide or the online help.

Regenerate a table of contents

The steps for regenerating a table of contents vary slightly, depending on whether the document is in one file or several files (combined into a book).

To regenerate the table of contents for a single-file document

1. Open the document.
2. On the **File** menu, click **Generate/Book**.

3. On the Generate/Book dialog (Figure 115), select **List** and choose **Table of Contents**.

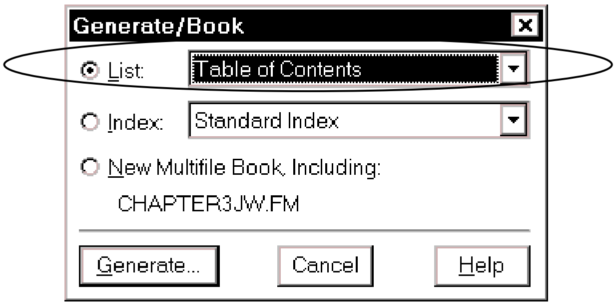


Figure 115. Generating a table of contents list

4. Click **Generate**. The Set Up Table of Contents dialog (Figure 116) appears.

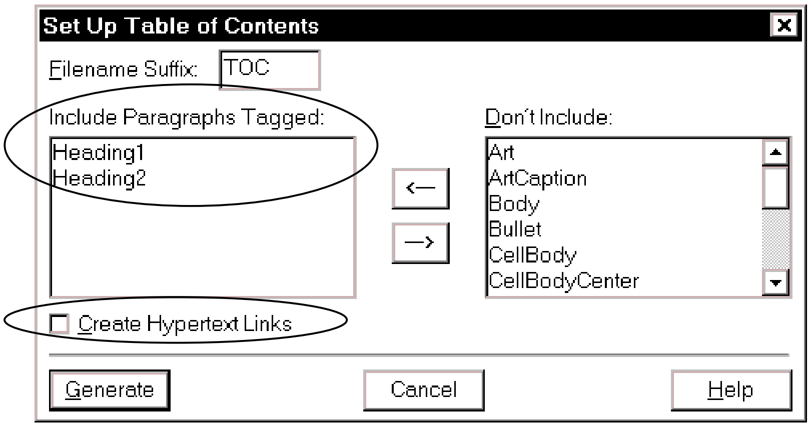


Figure 116. Choosing what to include in a table of contents

5. If necessary, change the list of paragraph tags to be included in the table of contents, and select or deselect the **Create Hypertext Links** checkbox.
6. Click **Generate**. The generated table of contents replaces any previously generated contents list for the document.
7. Save the generated file.

To regenerate the table of contents for a multi-file document

1. Open the book file for the document.
2. If you **do not** want to make any changes to the headings included in the table of contents, or whether the entries are hypertext links, skip to step 4.

   If you **do** want to make any changes to the TOC, or whether the entries are hypertext links, right-click on the name of the TOC file and click **Set Up File** from the pop-up menu.
3. On the Set Up Table of Contents dialog (Figure 117), make any necessary changes, then click **Set**. You return to the book file window.
4. Right-click on the TOC file and click **Generate/Book** from the pop-up menu.
5. On the Generate/Book dialog (Figure 115), select **List** and **Table of Contents**, then click **Generate**.
6. Save the generated file.

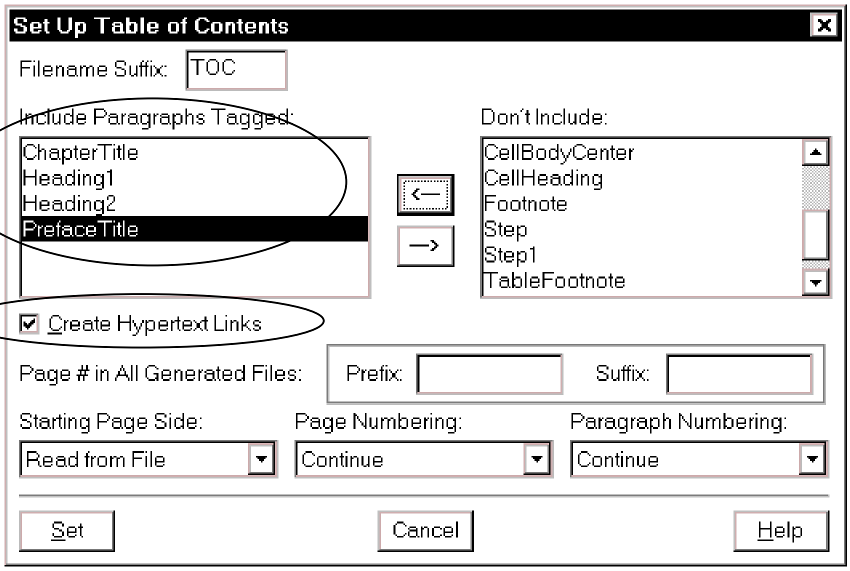


Figure 117. Changing the setup for a table of contents for a book file

Change the appearance of the table of contents

In the TOC file (not the document file from which the table of contents was created), change paragraph and character formats and page layout as needed. See "Applying and changing paragraph and character formats" on page 150 and "Changing page layouts" on page 161 for more information.

Changing page layouts

Page layouts are stored in master pages. FrameMaker **templates** contain master pages and reference pages. FrameMaker **documents** contain master, body and reference pages. (For details on Reference pages, see the user guide or the online help.)

You can change page layouts in several ways:

- Make layout changes directly to a body page, which affect only the page or pages specified, or make layout changes directly to a body page and instruct FrameMaker to update any related master pages and the layout of any other body pages that use those master pages.

  For details on how to change page layouts, please see the user guide or the online help. It's best not to try to change anything unless you know a lot more than I can tell you in this brief section.
- Apply a different master page from the same document template to the body page (see "Apply a different master page" on page 161).
- Import formats and page layouts from a different template, to affect the entire document (see "Apply a different template" on page 162).

Apply a different master page

If the appropriate master page exists in the document template, you can apply it to any body page:

1. Display the body page you want to change.
2. On the **Format** menu, point to **Page Layout**, then click **Master Page Usage**.

3. On the Master Page Usage dialog (Figure 118), in the **Use Master Page** area, click **Custom** and choose the page name on the **Custom** list.

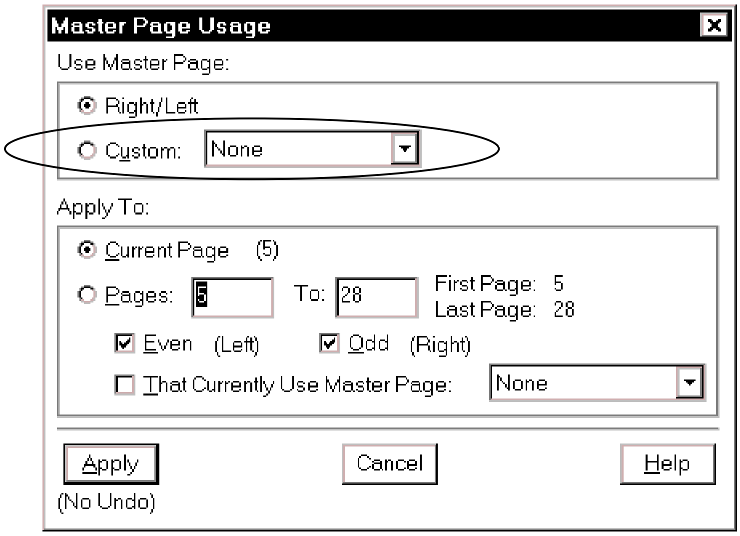


Figure 118. Choosing a master page to apply to a body page

4. In the **Apply To** area, do one of the following:
   - To apply the change to the current body page, click **Current Page**.
   - To apply the change to a range of pages, type the starting and ending page numbers in the **Pages** boxes.
5. Click **Apply**.

Apply a different template

To change an existing document by applying page layouts, formats (paragraph, character, table, cross-reference), variables, and other settings from a different template, you import those settings from the template. It's best if the document and the new template use the same names for these settings; remember that format and other names are case sensitive (that is, "body" is not the same as "Body").

1. Open the document you want to update, and the document (in this example, a template) that contains the formats you want to import.
2. In the document you're updating, on the **File** menu, point to **Import**, then click **Formats**.
3. In the Import Formats dialog (Figure 119):
   a. Select the template from the **Import from Document** list.
   b. Select the **Import and Update** settings you want to apply.
   c. To remove page breaks that are not part of a paragraph format, select **Manual Page Breaks** in the **While Updating, Remove** section.
   d. To remove format and layout overrides from the document, select **Other Format/Layout Overrides**.
4. Click **Import**. The settings from the selected template are applied to your document, and its appearance changes.

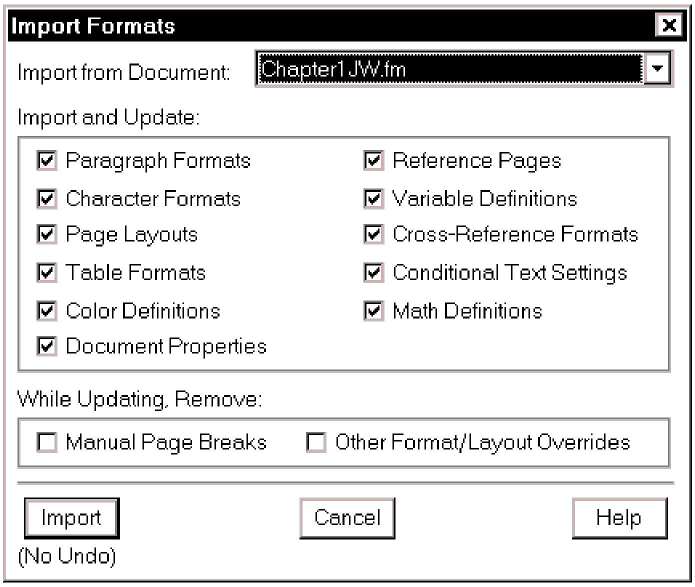


Figure 119. Importing formats from one document to another

5. Check your document carefully for any unchanged paragraphs, tables or other formats that existed in the document but not in the template. You need to redefine those formats manually, as described in other sections of this chapter.

Tip You cannot undo this change. If you make a mistake, close the document without saving, then reopen it and start again.

Editing headers and footers

Headers and footers are stored on the master pages for the document. Therefore you need to display the master page before you can edit the headers or footers.

On the **View** menu, click **Master Pages**. The master page used by the current body page appears. (You can view other master pages when a master page is visible, by using the same methods as moving through body pages.)

Some information in headers and footers may be ordinary text; other information may be supplied by markers or by system or user variables.

- Edit ordinary text as you would edit any other text.
- To edit markers, you may want to replace one marker with a different marker, or you may want to change the marker text (but if you change the marker text, it will change what appears anywhere else the marker is used).
- To edit variables, see "Editing user variables" on page 172.

For more information on editing headers and footers, see the user guide or the online help.

To specify different headers and footers on odd and even pages, or on the first page of a section:

1. Make sure a separate master page has been defined for each of the page types on which you want a different header or footer.
2. Display the relevant master page and edit the header or footer as needed.

Have portrait headers on landscape pages

A common requirement is a document that contains mostly portrait pages, with a section of landscape pages in the middle. If you want the headers of all the pages to print on the short side of the paper (the “top” as you’re looking at the sheet of paper), FrameMaker (unlike Word or Word Pro) makes this very easy for you, by providing the facility to define “rotated” master pages.

If the appropriate master page exists in the document, you can apply it to any body page, as described in “Apply a different master page” on page 161.

If the document does not include an appropriate master page, you need to define a new master page (look for “rotated master page” in the user guide or online help) or import an appropriate page layout from another template (see “Apply a different template” on page 162).

Editing footnotes and endnotes

You can edit footnotes and endnotes in FrameMaker without doing anything special. However, if you want to delete a footnote completely, you need to delete the footnote reference in the body of the document, not the footnote text, or you will still have the footnote reference in the document body, and the line at the bottom of the page, but no footnote text. When you delete the reference marker, the footnote text is automatically deleted as well.

If you want to change the numbering style (for example, from a number series to a series of symbols):

1. Click in a text frame outside a table.
2. On the **Format** menu, point to **Document**, then click **Footnote Properties**.
3. On the Footnote Properties dialog (Figure 120), choose a numbering style on the drop-down list or enter a style in the **Custom** box.

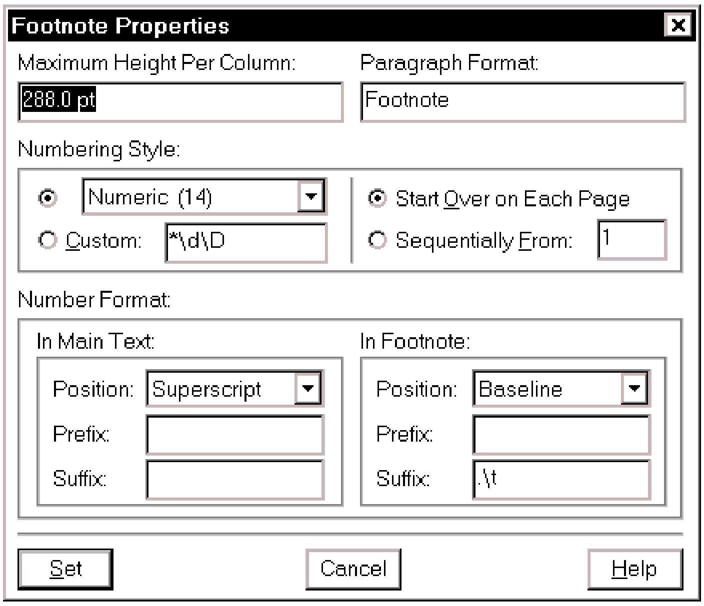


Figure 120. Choosing footnote properties

The list includes numbers and letters. Your custom style can use any combination of numbers, letters and symbols, which will be used in the order you enter them. To enter a sequence of characters, type a backslash (****) before each character.

4. Choose whether you want document footnote numbers to be restarted on each page or numbered sequentially throughout the document.
5. Specify the format of the footnote reference in main text and of the footnote number in the footnote. Either number can be in the superscript, baseline or subscript position, and either can have a prefix and suffix.
6. Click **Set**.

Changing table layouts

FrameMaker's tables can serve several purposes:

- To present tables of data, similar to those you might see in a spreadsheet
- To line up material that might otherwise be lined up using tabs
- To position various page elements in columns, or line up graphics in the margin with text in indented paragraphs (although you can create many of the same effects using anchored frames)

In each case, you may need to change what the writer has produced. For example, the style guide for the document may prescribe a table layout style that the writer has not applied consistently.

This section provides some tips for changing table layouts quickly:

- Select a cell, a row, a column, or a table
- Change table width
- Change column widths
- Change row heights
- Add columns and rows
- Delete columns and rows
- Merge and split cells
- Reformat table or individual cells
- Remove vertical or horizontal gridlines
- Change tabbed text into a table

Select a cell, several cells, a row, a column, or a table

To select a table cell, click in the cell and drag across the cell boundary, then back into the cell. A handle appears at the right-hand edge of the cell.

To select several adjacent cells (vertically or horizontally) or an entire row, drag across all the cells you want to select, across the boundary of the last cell, then back into the last cell. One or more handles appear at the right-hand edge of the selected cells.

To select an entire column, drag from a heading cell into the first body cell below it.

To select an entire table, you can drag from the upper left-hand cell to the lower right-hand cell, or you can select one or more cells, then press **Ctrl+A**. (If you don't select at least one cell first, pressing **Ctrl+A** will select the entire text flow in the document.)

Tip FrameMaker provides keyboard shortcuts for all these selection actions and more.

Change the width of a table

A common reason to change the width of a table is to make it fit exactly into a column or across an entire page.

1. Select an entire row of the table. A handle appears on the right-hand edge of the table.
2. Drag the handle to the right or left to make the table wider or narrower. When you release the mouse button, the table moves as necessary and the columns adjust in width to keep the same ratio as before.
3. If necessary, now adjust individual column widths.

Change column widths

To quickly change the width of a column:

1. Select two or more adjacent cells in the column. A handle appears on the right-hand edge of each selected cell.
2. Drag the handle to the right or left to make the column wider or narrower. The total table width adjusts to fit the new column width.
3. To change the width of two adjacent columns, without changing the width of the entire table, hold down the **Shift** key while you drag the column handle.

For more precise positioning:

1. Right-click in the selected column and click **Resize Columns** on the pop-up menu.
2. On the Resize Selected Columns dialog (Figure 121), specify the column width, then click **Resize**.

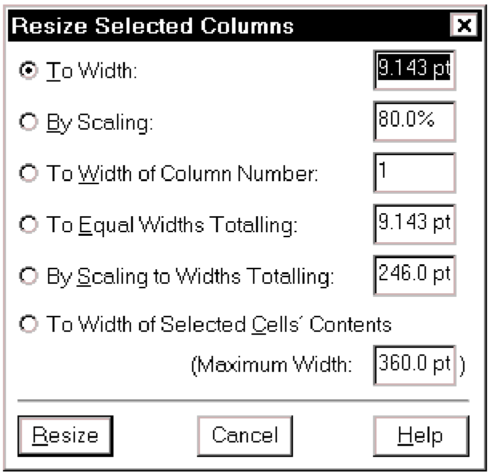


Figure 121. Resizing columns in a table

Change row heights

1. Right-click in the row you want to adjust, point to **Table** in the pop-up menu, then click **Row Format**.
2. On the Row Format dialog (Figure 122), type minimum and maximum values for the row height, then click **Set**.

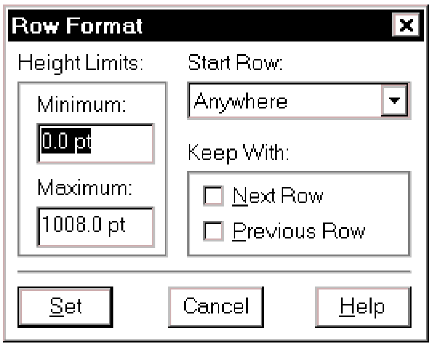


Figure 122. Choosing minimum and maximum values for row height

Add columns and rows

To add a column to a table

1. Click in the column before or after which you want to add a new column.
2. On the **Table** menu, click **Add Rows or Columns**.
3. On the Add Rows or Columns dialog (Figure 123), select **Add 1 Column**, choose where you want the column placed (to the left or the right of the selected column), and click **Add**.

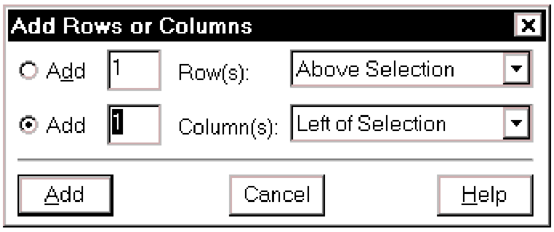


Figure 123. Adding a column to a table

After adding a column, you may need to resize the table or the columns to fit the space available, as described in "Change the width of a table" and "Change column widths" on page 166.

To add a row to a table

1. Click in the row above or below which you want to add a new row.
2. On the **Table** menu, click **Add Rows or Columns**.
3. On the Add Rows or Columns dialog (Figure 123), select **Add 1 Row**, choose where you want the row placed (above or below the selected row, or as a heading), and click **Add**.

Tip To quickly add a row at the bottom of a table, place the insertion point in the last row and press **Ctrl+Enter**.

Delete columns and rows

1. Select a column or row, right-click in the selection, then choose **Cut** on the pop-up menu.
2. On the Cut Table Cells dialog (Figure 124), select **Remove Cells from Table** and click **Cut**.

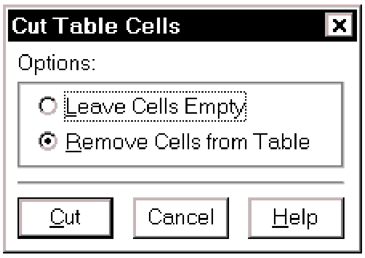


Figure 124. Deleting a column or row from a table

Merge and split (straddle and unstraddle) cells

Select the cells you want to merge, right-click in the selection, then choose **Straddle** on the pop-up menu. The cells are merged. You may want to redefine the position of the text in the merged cells (see "Reformat table or individual cells").

You can split (unstraddle) cells that have previously been merged. Select the straddle cell, right-click, then choose **Unstraddle** on the pop-up menu.

Reformat table or individual cells

The document design should specify which lines in a table are visible (outside borders, vertical gridlines, horizontal gridlines), the weights of different lines, and so on. If the appropriate table format has been defined but not applied to a table:

1. Right-click anywhere in the table, point to **Table** in the pop-up menu, then click **Table Designer**.
2. On the Table Designer dialog (Figure 125), choose the required table format in the **Table Tag** list, then click **Apply**.

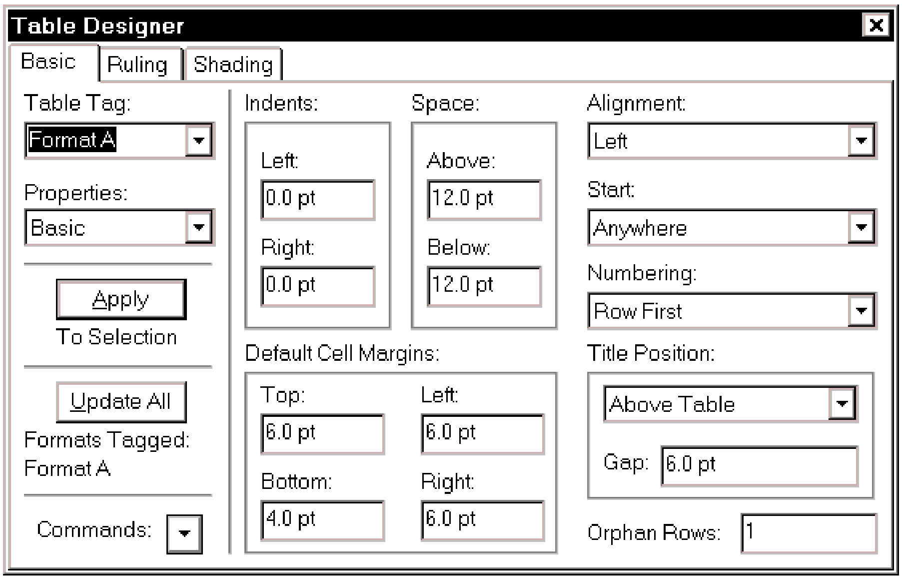


Figure 125. Choosing a table format

If the table's appearance does not change to the format you selected, then you need to remove any formatting overrides first. To do this:

1. Select the entire table.
2. Right-click anywhere in the table and select **Custom Ruling & Shading** on the pop-up menu.

3. On the Custom Ruling and Shading dialog (Figure 126), choose **From Table** in the **Apply Ruling Style** list, make sure all the checkboxes in the **Outside Edge** and **Inside Borders** sections are selected, then click **Apply**.

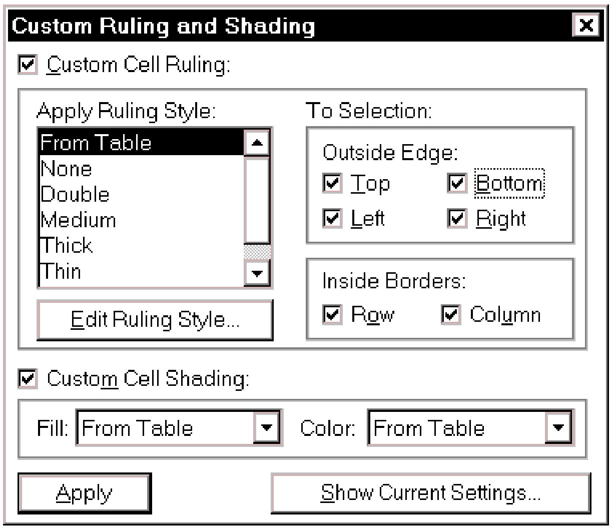


Figure 126. Removing format overrides from a table

If none of the table formats are appropriate for a particular table, you can either:

- Define a new format and apply it to the table
- Use the Custom Ruling and Shading dialog to specify the ruling and shading.

To remove vertical or horizontal gridlines

For a quick way to remove all gridlines from a table:

1. Select the entire table.
2. Right-click anywhere in the table and select **Custom Ruling & Shading** on the pop-up menu.
3. On the Custom Ruling and Shading dialog (Figure 126), choose **None** in the **Apply Ruling Style** list, make sure all the checkboxes in the **Outside Edge** and **Inside Borders** sections are selected, then click **Apply**.

Tip To define borders (or no borders) on only some cells, select the cells before right-clicking and selecting **Custom Ruling & Shading**. The settings you choose in the dialog will apply only to the selected cells.

Change tabbed text into a table

If a writer has used tabs to put text into columns, and particularly if some lines have more than one tab between columns (because the writer used default tab stops instead of defining them explicitly), the formatting can go seriously wrong if something else is changed, for example the typeface, type size, or line length.

To change tabbed text into a table:

1. Remove any excess tabs, so that only one tab appears between the columns.
2. Select all the text you want to convert.
3. On the **Table** menu, click **Convert to Table**.
4. On the Convert to Table dialog (Figure 127), select a table format, click **Tabs** in the **Treat Each Paragraph As** section, and click **Convert**.

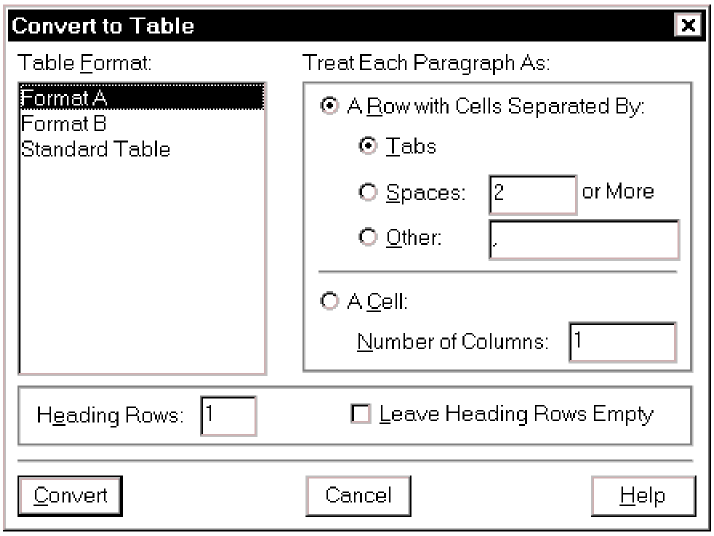


Figure 127. Changing tabbed text into a table

Using automatic cross-references

Most cross-references you use will probably point to a paragraph (for example, a heading, a figure caption, or a table caption), although they can point to a spot indicated by a Cross-Ref marker (similar to a bookmark in Word).

Insert a new cross-reference

To insert a new cross-reference or replace a typed reference with an automatic one:

1. Place the insertion point where you want the cross-reference to appear (or select the text you want the cross-reference to replace).
2. On the **Special** menu, click **Cross-Reference**.
3. In the Cross-Reference dialog (Figure 128):
    a. If you are cross-referencing a paragraph in another file (for example, in a multi-file book), choose the required file in the **Document** list.
    b. If necessary, click the down-arrow next to **Source Type** and choose **Paragraph Tags**.
    c. Choose the required paragraph tag (for example, Heading 2, Figcap, Tablecap) in the **Paragraph Tags** list, then select the paragraph text from the **Paragraphs** list.
    d. In the **Reference Format** section of the dialog, choose the format you want for the cross-reference (for example, “See xxxxx on page yy” or “Figure xx”). If necessary, you can change the format or add a new format by clicking **Edit Format**.
4. When you have made your selections, click **Insert**. (This button is labeled **Replace** if you have selected text to be replaced by the cross-reference.)

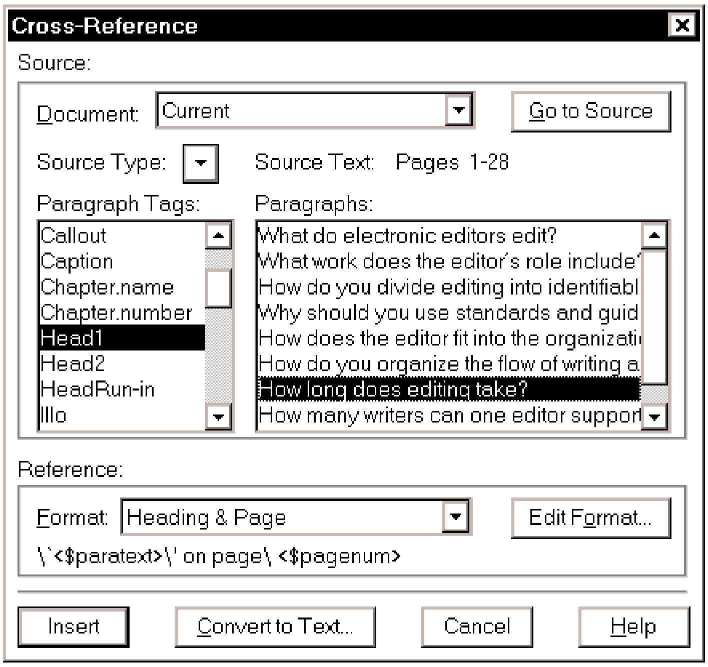


Figure 128. Specifying a cross-reference target

Change an existing cross-reference

You cannot edit the text of a cross-reference directly. Instead, you need to change the source text or the format of the cross-reference.

1. Double-click the cross-reference you want to change. The Cross-Reference dialog (Figure 128) appears.
2. If you want to change the format of the cross-reference, you can:
   - Choose a different format from the list at the bottom of the dialog.
   - Click **Edit Format** and change the definition or define a new format. (For details on how to define a cross-reference format, see the user guide or the online help.)

   If you want the cross-reference to point to a different source, select the required paragraph or spot from the list in the middle of the dialog.

   When you are done, click **Replace**.
3. If you want to display the source text, click the **Go to Source** button, found at the top right of the dialog. FrameMaker displays the page containing the source.
4. If you can't see the marker at the beginning of the source text, go to the **View** menu and click **Text Symbols**.
5. You can now change the source paragraph.

Editing user variables

FrameMaker's system and user variables can be used for a variety of purposes. I won't discuss most of them here; if you're interested, refer to the user guide or the online help.

One way writers use (or should use) user variables is to hold information that is likely to change during the course of a project. For example, the name of a product or some of its components may change during development or just before release. If writers have inserted the changeable information as a user variable, they (or you) can change the definition of the variable in one place and all the places where that information appears will be updated automatically.

You can insert a variable on any type of page in a document—a body page, master page, or reference page. However, you can insert the Current Page # variable or a running header/footer variable only in a background text frame on a master page.

You can't edit occurrences of a variable directly in a document. To change the variable, you need to change its definition. You can convert a variable to editable text and then edit the text in the document; however, the text is no longer updated when the variable definition changes.

To edit a user variable definition:

1. Click in a text frame. On the **Special** menu, click **Variable**.

   If you're changing the definition of the Current Page # variable or a running header/footer variable, you must click in a background text frame on a master page.

2. On the Variable dialog (Figure 129), select a variable in the list and click **Edit Definition**.

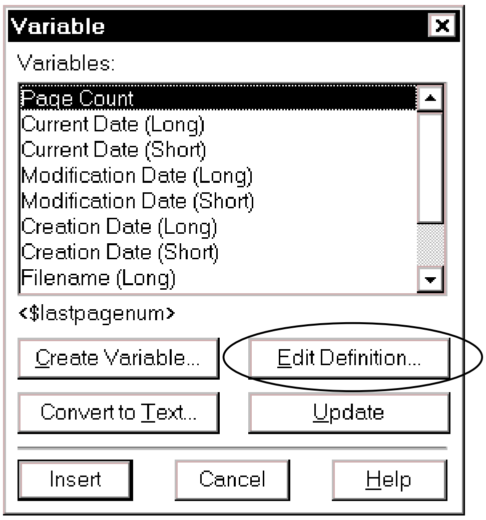
   

   Figure 129. Choosing a variable to edit

3. In the Edit User Variable dialog (Figure 130), edit the name or definition and click **Change**. Variable names are case-sensitive.

4. To change the character format within the variable definition, using a character format stored in the Character Catalog:

   Place the insertion point in the **Definition** box where you want to change the character format and then click the character format in the **Character Formats** list. Do not use a character format whose tag includes angle brackets.

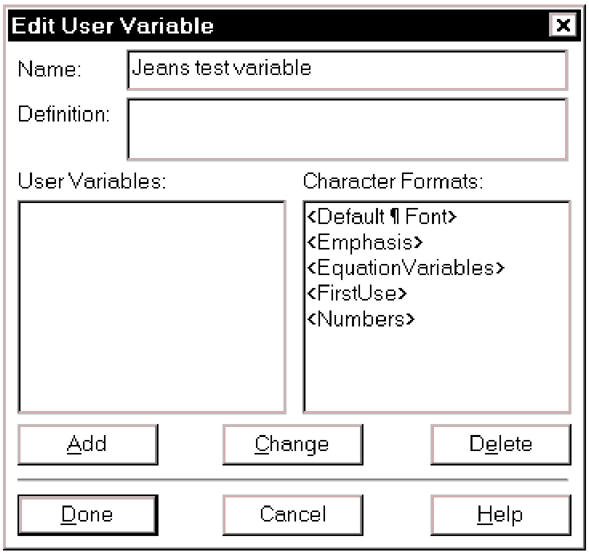


Figure 130. Editing the definition of a variable

5. To change the character format back to the paragraph's default font before the end of the variable:

   Place the insertion point in the **Definition** box where you want to change the character format, and then click <Default ¶ Font> in the **Character Formats** list.

6. Click **Done** to return to the Variable dialog and then click **Done**. (The **Cancel** button shown in Figure 129 changes to **Done** after you have edited a variable.)

To create a new user variable definition:

1. Click in a text frame. On the **Special** menu, click **Variable**.
2. Click **Create Variable**.
3. On the Edit User Variable dialog, type the name and definition of the variable. Variable names are case-sensitive.

   If you don't specify a character format in the variable definition, the variable uses the format at the insertion point.

4. You can change the text and character format within the definition as described earlier for editing a definition.
5. Click **Add**. The variable appears in the **User Variables** list.
6. Click **Done** to return to the Variable dialog and then click **Done**.

Using conditional text

To use Conditional Text, the writer or editor needs to create condition tags, which the editor then applies manually to the inserted and deleted text and comments.

To set up a condition tag:

1. On the **Special** menu, click **Conditional Text**.
2. On the Conditional Text dialog, click **Edit Condition Tag**.
3. On the Edit Condition Tag dialog (Figure 131), type a name for the tag and specify the style and color to be used for the tag. For example, you might choose Strikethrough and Red for the Deleted tag.
4. Click **Set**. The new condition tag appears in the Conditional Text dialog.

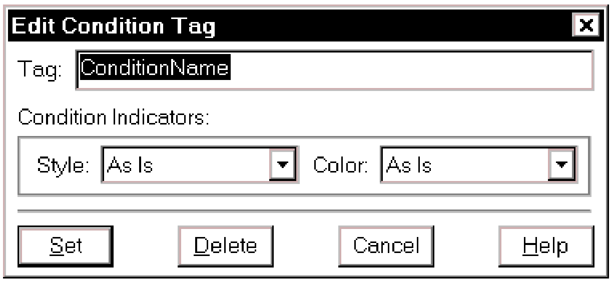


Figure 131. Specifying style and color for conditional text

To apply a condition tag to text as you type:

1. Click to place the insertion point where you want to start inserting text.
2. Press **Ctrl+4**. Look in the left-hand corner of the status bar. It now displays a question mark, and the first condition tag by alphabetical order.
3. If the tag you want isn't the one shown, type the first letter of the required tag (for example, **I** for **Insert**).
4. Press **Enter**. The condition tag shown will be applied to any text you type until you turn it off.
5. Type the text you want to insert at that point.
6. If you wish, you can now move the insertion point to another place in the document and insert more conditional text.
7. When you want to stop inserting text (for example, when you want to delete some text), press **Ctrl+6** to turn off the condition tag.

To apply a condition tag to existing text (for example, to indicate text you want to delete):

1. Select the text to be deleted.
2. On the **Special** menu, click **Conditional Text**.
3. On the Conditional Text dialog (Figure 132), click on the appropriate tag on the **Not In** list. The **Conditional** button is now selected. Move the tag (**Delete** in this example) to the In list, by clicking on the left-arrow button below the **Not In** list.

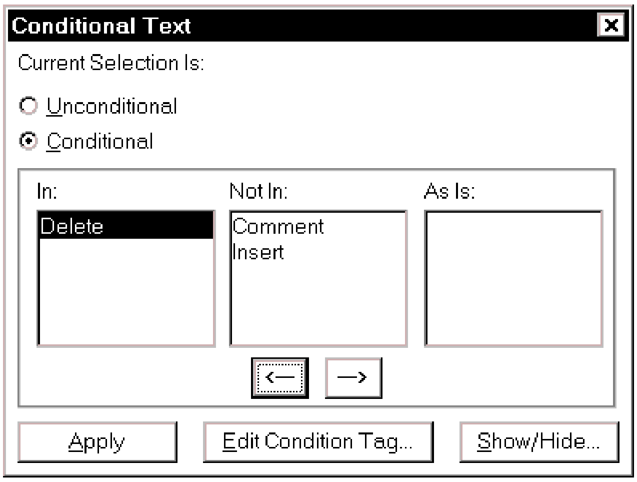


Figure 132. Choosing conditional text to include or exclude

4. Click **Apply** to apply this condition tag to the selected text.

Editing or annotating graphics, including photographs and screen captures

To keep an illustration at a specific place on a page (for example, a logo on letterhead stationery), so it doesn't move when the surrounding text moves, you would draw, paste or import the illustration directly onto the body page of the document, then move the illustration to the desired position.

To keep an illustration at a specific place in the text (so that it does move when the surrounding text moves), you would use an anchored frame. An anchored frame is created automatically when you paste or import a graphic at an insertion point, or you can create a frame by choosing **Anchored Frame** on the **Special** menu.

This section describes a few techniques for deal with illustrations and anchored frames:

- Keep the caption with the figure
- Edit graphics
- Annotate graphics

Keep the caption with the figure

When using anchored frames, you can provide a title or caption for the figure (and make sure it stays on the same page as the figure) in these ways:

- Use the paragraph immediate before or after the anchored frame as the caption, and use a paragraph tag that defines the caption as "keep with previous" or "keep with next"
- Place the graphic into a one-cell table and use the table caption as a figure caption
- Create a one-column, two-row table and place the anchored frame in one cell and the caption in the other
- If the caption is to appear beside the figure instead of below or above it, place the anchored frame and the caption paragraph into two cells of a one-row table

Edit graphics

If graphics were produced using FrameMaker's drawing tools, you can edit them directly in FrameMaker. To edit other graphics, you may need to use the software that produced them (for example, PowerPoint or Visio) or you may be able to use equivalent software (for example, bitmaps, gifs or jpegs can be edited using a variety of image-editing software).

Annotate graphics

If your job as editor is not to change the graphics directly, but to comment on them (annotate them):

- The quickest and easiest way is to use the same commenting technique as you'd use for comments in text (see "Inserting comments and questions" on page 149). Put the comment marker in the figure caption or other paragraph before or after the illustration.
- You could use a text frame and drawing tools (lines, arrows) to annotate a graphic. For instructions, see the user guide or the online help.

Accepting or rejecting editorial changes and comments

This step would normally be done by the writer, but you may need to explain how to accept or reject changes and comments.

Accept or reject changes marked with character formats

Using the example in "Edit using character formats" on page 147, where the Delete tag uses Strikeout and a color (say, Red) and the Add tag uses Underline and a different color (say, Blue):

1. Save a copy of the document with all editorial comments in it.
2. In the working copy of the document, find the first change.
3. For text marked Delete, either delete the text (accepting the editor's change) leave it as shown (rejecting the editor's change), or change it to something different.
4. For text marked Add, either leave it as shown (accepting the editor's change), delete it (rejecting the editor's change), or change it to something different.

When you are done, all remaining text should represent the revised version of the document. Now you want to remove the special formats.

1. On the **Edit** menu, click **Find/Change**.
2. On the Find/Change dialog (Figure 99), choose **Character Format** from the **Find** list.
3. In the Find Character Format dialog (Figure 133), change most of the items to As Is except for the special characteristics of the Deleted tag (red, strikethrough in my example). Then click **Set**.

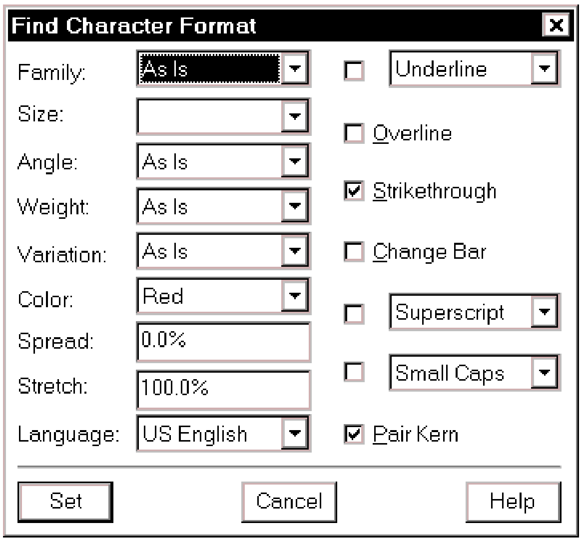


Figure 133. Specifying the characteristics of the Deleted tag

4. Back on the Find/Change dialog, select **To Character Format** from the **Change** list.
5. In the Change Character Format dialog (similar in appearance to Figure 133), change most of the items to As Is, change Color to Black (assuming your default font is Black), and uncheck Strikethrough. Click **Set**.
6. Back on the Find/Change dialog, click **Change All in Document**.

7. Repeat steps 2 through 6 to remove the characteristics of the Add tag (blue, underline).
8. Close the Find/Change dialog. Check your document carefully for change bars (assuming you had them turned on for the Add and Delete formats) or unwanted colors, just to make sure you have caught and changed everything.

Tip You could change each occurrence of the Add and Delete tags to the default paragraph font as you accept or reject the changes, rather than waiting until the end and changing them all at once. This technique might suit your work better.

Accept or reject changes marked as conditional text

This technique works with files created using the document comparison facility, and text manually tagged as conditional.

To accept all the editor's deletions, delete the condition tag called Deleted:

1. On the **Special** menu, click **Conditional Text**.
2. On the Conditional Text dialog (Figure 132), click on the Deleted tag, then click **Edit Condition Tag**.
3. At the Edit Condition Tag dialog (Figure 134), click **Delete**.

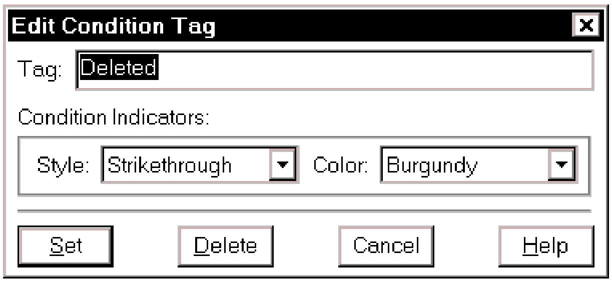


Figure 134. Editing a condition tag

4. At the Delete Condition Tag dialog, select **Delete the Text** and click **OK**.

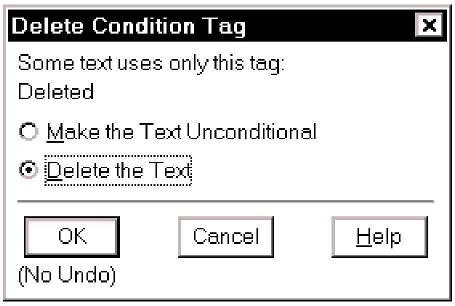


Figure 135. Deleting a condition tag and the text tagged with that condition

To accept all the editor's insertions, delete the condition tag called Inserted. At the prompt, select **Make the Text Unconditional** and click **OK**.

To accept deletions individually:

1. Search for text tagged with the Deleted condition tag. Manually remove the text that you confirm should be deleted.
2. To keep some of the text tagged Deleted (that is, to reject the deletion), you can:
   - Select it as you go and make it Unconditional.

- Or, after deleting all the text you don't want, you can simply delete the condition tag called Deleted. At the Delete Condition Tag dialog (Figure 135), select **Make the Text Unconditional**.

To accept insertions individually:

1. Search for text tagged with the Inserted condition tag. Manually remove the text that you do not agree should be inserted.
2. To keep some of the text tagged Inserted (that is, to confirm the insertion), you can:
   - Select it as you go and make it Unconditional.
   - Or, after removing all the text you don't want inserted, you can simply delete the condition tag called Inserted. At the prompt, select **Make the Text Unconditional**.

If you used the document comparison technique, and the writer agrees with everything that the editor did (both insertions and deletions), just save the Summary and Composite documents for your audit trail, and keep the edited document as your new version.

Incorporate reviewers' suggestions made with comments

If you used comment markers, you or the writer can generate a list of the markers in the document. The markers are hyperlinked to where they were inserted, so you can jump directly to the marker itself and read it in context. You can also search through the document to find the markers one at a time.

If you keep the marker dialog box open to the side, you'll see the contents of each marker as you encounter it. You can then cut and paste the marker text into the document text, or type changes directly into the document text.

If comments were inserted using conditional text, you can deal with them as you did insertions and deletions.

Removing comments from a file

After dealing with editorial comments, and before the document is finalized and distributed to others, the writer may wish to remove the comments.

To remove comment markers from a file:

1. Save an archive copy of the document for audit purposes, if required.
2. On the **Edit** menu, click **Find/Change**.
3. In the Find/Change dialog, choose **Marker of Type** and type **Comment** in the **Find** box. Leave **Change** as **To Text:** and nothing in the text box. Click **Change All In**.

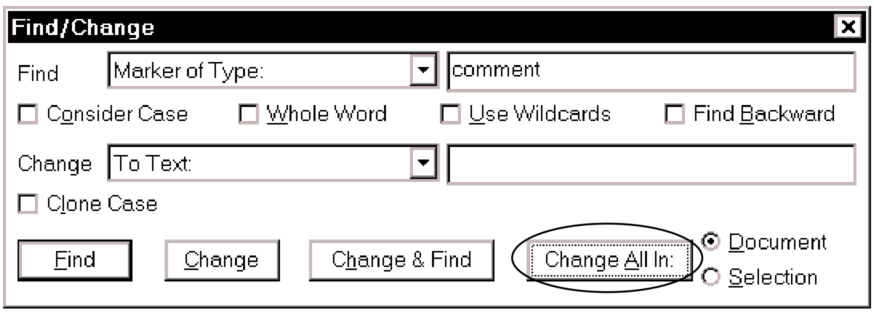


Figure 136. Finding comment markers in a file

Finding more information

In addition to the user guide and online help, you might like to try:

Adobe Systems, *Adobe FrameMaker 5.5 classroom in a book*, Adobe Press, 1997, ISBN 1568303998.

Mastering FrameMaker 5, by Thomas Neuburger, ISBN 0782117120. This book is out of print, but a revised edition (for FrameMaker 6) is expected to be published in 2000.

FrameMaker for dummies, by Sarah O'Keefe, IDG Books Worldwide, 1999, ISBN 0764506374.

Framers discussion lists: send e-mail with the message "Subscribe Framers" to <majordomo@FrameUsers.com> or <majordomo@omsys.com> (two different lists).

Adobe user forums:
http://www.adobe.com/supportservice/custsupport/forums.html

Chapter 7
Editing using Adobe Acrobat

Adobe Acrobat is a collection of programs for creating and modifying electronic documents in Portable Document Format (PDF). PDF files have become popular as a distribution method for both review copies and final copies of documents.

Acrobat Reader is a free program for reading PDF documents online. It does not provide tools for editing or annotating those files. You need to have a copy of Acrobat Exchange to be able to modify, as well as view, PDF documents. Acrobat Exchange is part of the full Adobe Acrobat suite of products, which also includes PDF Writer, Acrobat Distiller, and various plug-ins.

If you don't have the software (for example, FrameMaker) being used to develop a document, or if the development process is such that you're not allowed to touch the files (all editing has in the past been done on paper), you can electronically mark up a PDF file. How much electronic editing you can do depends on which version of Adobe Acrobat you and the writer have.

If the final copy of the document is to be distributed to customers in PDF format, and it is intended to be read online, part of your job as the production editor should be to check the file just as you would check the final layout of any other document, but you will also need to check some online-specific features (such as hypertext links) in addition to the things you would normally check. A discussion of what to check and how to do the checking is outside the scope of this chapter, which looks only at using PDF files as a proofing mechanism for materials to be printed.

This chapter provides a brief summary of the following topics:

- Editing PDF documents using Adobe Acrobat 3
    - Work with comment notes
    - Store and distribute comment notes
    - Edit a PDF document directly
    - Touch up PDF files
- Editing PDF documents using Adobe Acrobat 4
    - Set annotation preferences
    - Display the tools you need
    - Work with note annotations
    - Work with text annotations
    - Work with graphic markup
    - Work with text markup
    - Store and distribute annotations
    - Touch up PDF files
- Creating PDF documents using Adobe Acrobat 3
- Creating PDF documents using Adobe Acrobat 4

Editing PDF documents using Adobe Acrobat 3

Adobe Acrobat 3 has limited capabilities for editing a PDF document that someone else has created. You can attach comments (in the form of "sticky notes") and do some minor line-by-line editing, but you can't rearrange paragraph order, change paragraphs into lists, amend page layout, adjust the width of table columns, edit graphics, or do any of a wide range of other electronic-editing tasks. You're limited to the sort of things you would be able to do on paper, but you can't do any of them as easily when marking up a PDF electronically.

Because of this limited editing capability, I strongly recommend that you find some other way to edit at any stage prior to production editing. At the production editing stage, you shouldn't be making any major changes anyway, but you should be looking for things such as bad page breaks, fuzzy graphics, hyperlinks that don't work correctly, and so on.

Adobe Acrobat 4 has more capabilities for editing files, most of which are relevant only if you are performing the final stop before publication of a document. Please see the online guides for Acrobat 4 if you need to work at that level.

Work with comment notes

Using notes, multiple reviewers can comment on the same copy of a document; notes can be color-coded for easy identification of the person commenting. Notes from other versions of the document can also be collected and incorporated into the review document.

To attach a note to a PDF document

1. Start Acrobat Exchange and open the file you want to edit.
2. On the **File** menu, point to **Preferences**, then click **Notes**.
3. On the Note Preferences dialog (Figure 137), type your name for **Default Label**, choose the color, font and point size for your notes, then click **OK**.

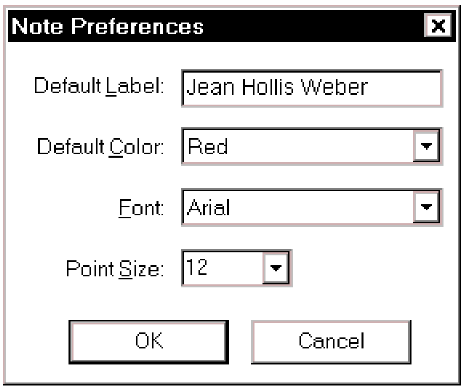


Figure 137. Setting preferences for comment notes

4. Click the **Text Notes** tool on the toolbar. The pointer will appear as a set of cross hairs.
5. Click in the paragraph you want to comment on (or anywhere on the page). An empty note window will appear.
6. Type your comment. Include enough information so the writer can be sure what paragraph you are talking about, because it's not always obvious from the location of the note on the page. When you finish, close the note window. It appears as a small colored "page" icon.

You can return to this note at any time, double-click on it to reopen it, and read or change its contents.

7. To turn off the Text Note function, select another tool (such as the Hand tool) from the toolbar.

To delete a note

1. Click on the note to select it.
2. Press **Delete**, and click **OK** to the confirmation message.

Store and distribute comment notes

Acrobat provides two convenient ways for storing and distributing comments, useful for archiving and for sharing among members of a team, without needing to distribute a large original document.

- Export
- Summarize

You can export all the notes from a document and place them in a new PDF file. The new (comments) file will contain the exported notes in their original placements on the page, but it will not contain the contents of the original file. (This can be useful when sending comment files over the Internet; the file size is significantly smaller than the original file. If recipients have the original file, they can import your notes file into the original document file and see the notes in relation to the document text.)

To export comment notes

1. On the **File** menu, point to **Export**, then click **Notes**.
2. Type an appropriate name for the file, change the location if necessary, and click **Save**.

To import a notes file into a PDF document

1. Open the document file.
2. On the **File** menu, point to **Import**, then click **Notes**.
3. Select the required notes file and click **Select**.

To summarize notes

You can also summarize and compile just the text of the notes into a new PDF document:

1. On the **Tools** menu, click **Summarize Notes**.

   A new PDF file is created. This file lists the notes that appear on each page of the original document, including the note labels (usually the reviewers' names), the dates they were added to the file, and the full text of the notes.

2. On the **File** menu, click **Save As**. Give the file an appropriate name and click **Save**.

To add summarized notes to a PDF document

1. On the **Document** menu, click **Insert Pages**.
2. Select the PDF file containing the summarized notes and click **Select**.
3. On the Insert dialog (Figure 138), click **After** in the **Location** group and **Last** in the **Page** group, then click **OK**.

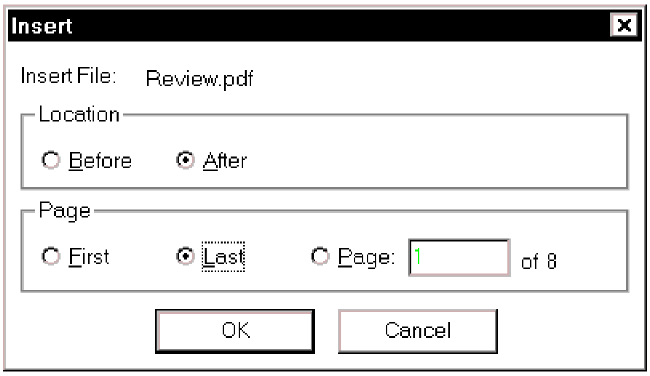


Figure 138. Inserting a summary of comment notes into the PDF file

Edit a PDF document directly

You can use the touch-up tool to change text formatting—font size, color and alignment—or to change the text itself. You can select existing text (one line at a time) and then enter new text and make it fit into the space that the selected text occupied.

For most editing purposes, you probably won’t be touching up the final copy; instead, you’ll be indicating your editorial changes and comments to the writer, who will incorporate the changes into the source file and regenerate a new PDF document. You might want to change the color of a word or a phrase which you discuss in a comment note, so the writer can easily see what you’re referring to.

Note: There are some restrictions on which fonts you can edit and what you can do if you don’t have the same font installed on your system. Check the Acrobat documentation for details.

To edit text

1. Select the touch-up tool, then select the text you want to change. (You can edit only one line of text at a time.)
2. Type in new or corrected characters.

To change the color of text

On the **Edit** menu, click **Text Attributes**, then click the **Font** tab on the Text palette (Figure 139). Select a font color for the changed text.

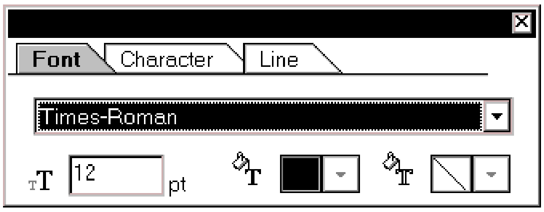


Figure 139. Selecting a font color for text

To adjust the alignment of a text line

You might use this function to make a heading centred instead of flush left.

On the Text palette, click the **Line** tab (Figure 140), then choose an alignment icon.

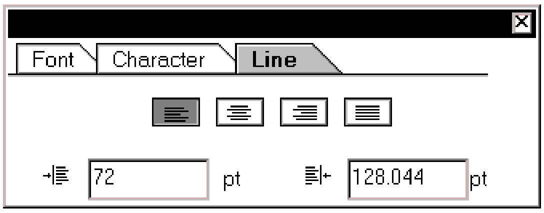


Figure 140. Adjusting the alignment of a heading

When you are finished using the Text palette, click the **Close** box at the top right corner.

Touch up PDF files

If you are doing the final production touch-up work on a PDF document, you might also need to:

- Crop and rotate pages
- Insert and delete pages
- Copy pages within a document and from one document to another
- Combine several PDF documents into one document
- Create a new PDF document that consists of pages extracted from an existing PDF document
- Replace some pages in a PDF document with pages from another PDF document

An explanation of these functions is outside the scope of this book. Please see the Acrobat online documentation for instructions on how to make those changes.

Editing PDF documents using Adobe Acrobat 4

Adobe Acrobat 4 has many capabilities for editing PDF files, most of which are relevant only if you are performing the final stop before publication of a document. At the production editing stage, you can fix a number of last-minutes problems such as bad page breaks, fuzzy graphics, hyperlinks that don't work correctly, and so on. Please see the online guides for Acrobat 4 if you need to work at that level.

Any changes you make to a PDF file do not affect the source file. You can use comment notes (called "annotations" in Acrobat 4) and mark up text and graphics to indicate your changes, but someone will have to type the changes into the source file. This type of editing is equivalent to marking up hard copy by hand.

Set annotation preferences

Before you start, check that the annotation preferences show your name as author. This setting affects the author listed for all notes, text, and graphic annotations that you create. (You can change the author listed for individual annotations at any time, by changing the annotation's properties.)

1. Start Adobe Acrobat and open the file you want to edit.
2. On the **File** menu, point to **Preferences**, then click **Annotations**.
3. On the Annotation Preferences dialog (Figure 137), type your name for **Author**, choose the font and point size for your notes, then click **OK**.

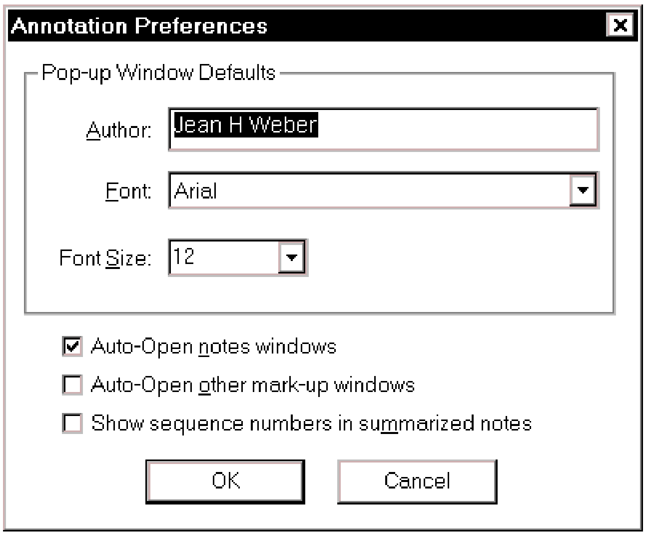


Figure 141. Setting preferences for comment notes in Acrobat 4

Display the tools you need

The annotation tools in Acrobat 4 are displayed in a toolbar on the left side of the document window.

If this toolbar is not visible, click the **Show/Hide Navigation Pane** icon in the command bar (below the menu bar). After the Annotation Toolbar appears, you can hide the Navigation Pane again, but the toolbar remains visible.

Some of the annotation tools are grouped into mini-toolbars that become visible when you point to a tool and hold down the left mouse button. (Not all of the visible tools have mini-toolbars.) To select a tool from a mini-toolbar, move the mouse pointer over it and release the mouse button. The selected tool is now the one visible on the main toolbar.

The groups of tools are:

Notes, Text, Audio, Stamp, File

Pencil, Line, Rectangle, Ellipse

Highlight, Strike through, Underline

Work with note annotations

Using annotations, multiple reviewers can comment on the same copy of a document; notes can be color-coded for easy identification of the person commenting. Notes from other versions of the document can also be collected and incorporated into the review document.

To attach a note annotation

1. Click the **Notes** tool on the toolbar. The pointer will appear as a small note symbol.
2. Click in the paragraph you want to comment on (or anywhere on the page). An empty note window will appear.
3. Type your comment. Include enough information so the writer can be sure what paragraph you are talking about, because it’s not always obvious from

the location of the note on the page. When you finish, close the note window. It appears as a small colored "page" icon.

4. If you wish, right-click on the closed note and choose **Properties** from the pop-up menu. On the Notes Properties dialog (Figure 142), you can select a different icon or a different color for the note, or change the author's name.

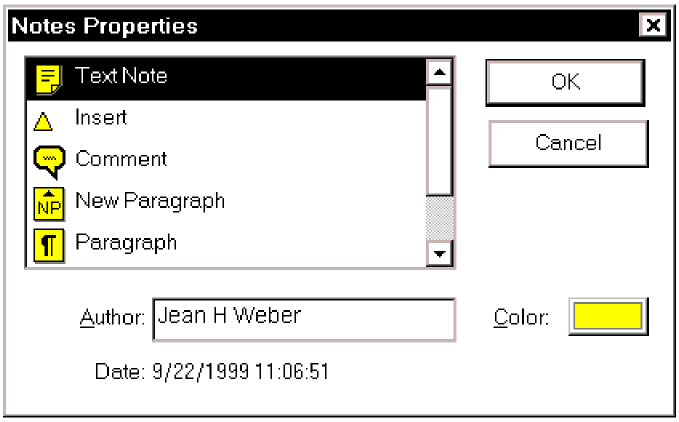
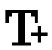


Figure 142. Changing the properties of a note in Acrobat 4

You can return to this note at any time, double-click on it to reopen it, and read or change its contents.

Work with text annotations

You can place a text annotation anywhere on a PDF page. Text annotations do not close like notes annotations; they remain visible on top of the document page.



1. Click the **Text Annotation** tool on the toolbar.
2. Click where you want the annotation to appear.
3. Type the text, then click outside the bounding box to finish the annotation.

If you want to change the properties of the text annotation:

1. Select the annotation, then right-click on it and choose **Properties** from the pop-up menu.
2. On the Text Properties dialog (Figure 143), choose a font style, size, and color, a border thickness, and a background color, then click **OK**.

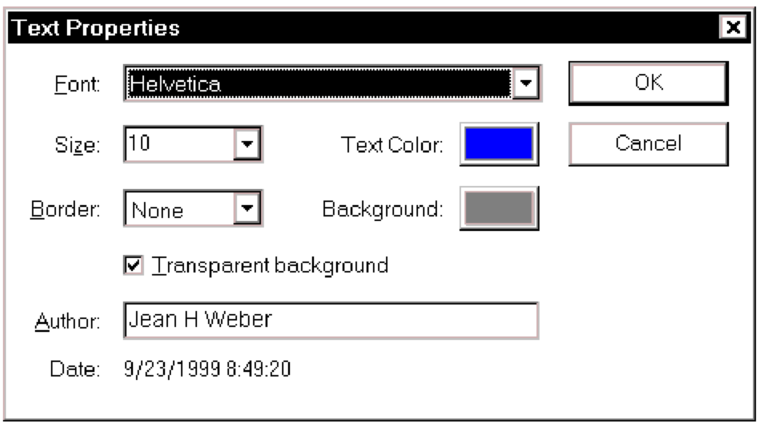


Figure 143. Changing the properties of a text annotation in Acrobat 4

Work with graphic markup

Sometimes graphic markup (usually combined with a text or note annotation) is the best way to indicate editorial comments. For example, you might want to circle an item on the page, or use a line or arrow to point to something.

Use this tool…	**To create this markup…**
Pencil	Freeform line
Rectangle, ellipse	A graphic that you can position over text or graphics
Line	Straight line

To draw with the pencil

1. Select the pencil tool.
2. Position the cursor where you want to begin drawings.
3. Hold down the left mouse button while you draw a shape. You can release the mouse button, move the cursor to a new location, press the mouse button again, and continue drawing.
4. When you have finished, click anywhere on the document page or choose another tool.
5. To change the properties of the line (for example, thickness and color), right-click on the drawing and choose **Properties** from the pop-up menu. Select the required properties and click **OK**.

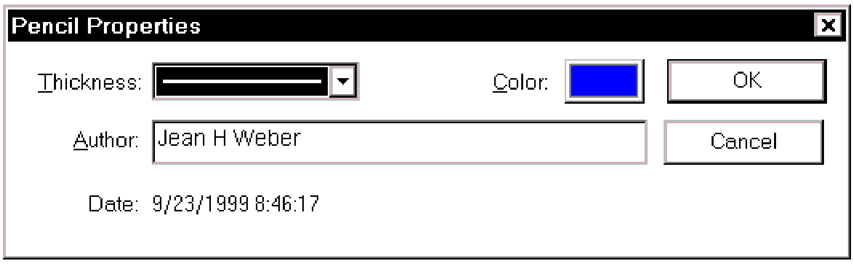


Figure 144. Changing the properties of a line drawn in Acrobat 4

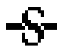
6. To change the placement of the graphic, click the Hand tool and move the cursor over the graphic until the cursor changes to an arrow. Drag to the correct location.
7. To adjust the size of the graphic, position the Hand tool over a handle at one of the corners of the graphic; when the cursor changes to a double-headed arrow, you can click and drag the graphic to the required size.
8. To associate a note with the pencil annotation, with the Hand tool selected, double-click the graphic and type the note text inside the window that opens.

To use the rectangle, ellipse, or line tool

1. Select the required tool.
2. Click a start point on the page, hold down the mouse button, and drag the graphic element to the required size. Release the mouse button when you are done.
3. Adjust placement, size and properties, or add a note, as for the pencil tool.

Work with text markup

You can use the text markup tools to highlight, strike through, or underline a section of text, and add a note window to explain your reason for the markup.

Use this tool...	To create this markup...
	Highlight
	Strikethrough
	Underline

1. Select the required tool.
2. Position the cursor at the beginning of the text you want to mark up, hold down the left mouse button, and drag through the text to be marked. Release the mouse button to complete the markup. The selected text changes color.
3. To change the color of the markup, right-click on the drawing and choose **Properties** from the pop-up menu. Select the required color and click **OK**.

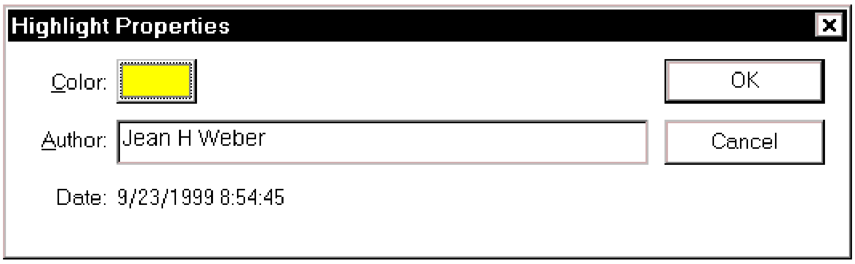


Figure 145. Changing the properties of text markup in Acrobat 4

4. To associate a note with the marked up text, double-click on it and type the note text inside the window that opens.

Store and distribute annotations

Acrobat 4 provides two convenient ways for storing and distributing annotations, useful for archiving and for sharing among members of a team, without needing to distribute a large original document.

- Export
- Summarize

You can export all the notes from a document and place them in a new PDF file. The new (comments) file will contain the exported notes in their original placements on the page, but it will not contain the contents of the original file. (This can be useful when sending comment files over the Internet; the file size is significantly smaller than the original file. If recipients have the original file, they can import your notes file into the original document file and see the notes in relation to the document text.)

To export all annotations

1. On the **File** menu, point to **Export**, then click **Annotations**.
2. Type an appropriate name for the file, change the location if necessary, and click **Save**.

To export selected annotations

1. On the **Tools** menu, point to **Annotations**, then click **Annotations Filter Manager**.
2. Choose the annotation types and author names you want to export, then click **OK**.
3. On the **File** menu, point to **Export**, then click **Annotations**.
4. Type an appropriate name for the file, change the location if necessary, and click **Save**.

To import annotations

1. Open the document file.
2. On the **File** menu, point to **Import**, then click **Annotations**.
3. Select the required annotations file and click **Select**.

To summarize notes

You can also summarize and compile just the text of the notes into a new PDF document:

1. On the **Tools** menu, point to **Annotations**, then click **Summarize Annotations**. A new PDF file is created.
2. On the **File** menu, click **Save As**. Give the file an appropriate name and click **Save**.

Touch up PDF files

If you are doing the final production touch-up work on a PDF document, you might need to:

- Change the alignment of text (for example, to center headings)
- Change font size or text color
- Crop and rotate pages
- Insert and delete pages
- Copy pages within a document and from one document to another
- Combine several PDF documents into one document
- Create a new PDF document that consists of pages extracted from an existing PDF document
- Replace some pages in a PDF document with pages from another PDF document

An explanation of these functions is outside the scope of this book. Please see the Acrobat 4 online documentation for instructions on how to make those changes.

Creating PDF documents using Adobe Acrobat 3

A detailed discussion of how to use Adobe Acrobat to create PDF documents (for example, how to create hypertext links within a document) is beyond the scope of this book. However, if you are dealing with documents produced by inexperienced Acrobat users, here are some hints to pass on to them.

Install and set up the necessary software on your computer

- For best results, many expert users recommend that you use only Type 1 fonts (not TrueType fonts) in your original document. (Other users say they have no problem with TrueType fonts.)
- Expert users recommend that you don't use PDF Writer for more than simple, text-based documents or perhaps draft copies of a more complex document, where (for example) you're not concerned about the quality of the illustrations but only whether the correct illustration has been used. Similarly, they recommend that you don't use FrameMaker's "Save as PDF" feature.

  Instead, print to a PostScript file and use Acrobat Distiller to produce the PDF. Distiller produces smaller (often much smaller) file sizes, in addition to clearer graphics. See "Print to a PostScript file" on page 192 and "Distill a PDF file from a PostScript file" on page 195 for details.
- If you're using Acrobat 3, be sure you are running Distiller 3.02; it's a crucial upgrade to 3.0. It works much better and you get a smaller PDF file as well. You can download it free from the Adobe site if you have an older version of Distiller. If you are using Acrobat 4, be sure you have the latest version.
- Be sure you have installed ADISTILL.PPD (PostScript Printer Description file) and the Adobe PS 4.2.6 driver (for Acrobat 3) or the latest driver for Acrobat 4. (You don't need to have a physical PostScript printer attached; all you need is a PostScript printer driver. Even if you do have a physical PostScript printer installed, don't use its driver.)

  Read and follow the instructions in the Readme file that accompanies Acrobat 3, especially the section starting "Configuring Distiller Assistant for use with Adobe PS 4.1." The Acrobat installer configures Distiller Assistant with a different (earlier) driver by default, and you will need to reconfigure it.

  In your printer driver properties, on the **PostScript** tab, under PostScript output format, select PostScript (optimize for portability – ADSC). Then click the **Advanced** button, and in the **Data format** section (Figure 147), select the **Pure binary data** checkbox.
- Be sure you have at least three times the size of the PostScript file available as free space on your hard disk, before attempting to distill the file. (The resulting PDF file may be considerably smaller than the PostScript file, but the Distiller needs a lot of space to do its work.)
- Print to a PostScript file, then distill the PostScript file to a PDF document. This process is summarized in the following sections. For details, see the online guide for Acrobat Distiller. By distilling, you can specify whatever job options you want and pick the specific printer driver you want to use.

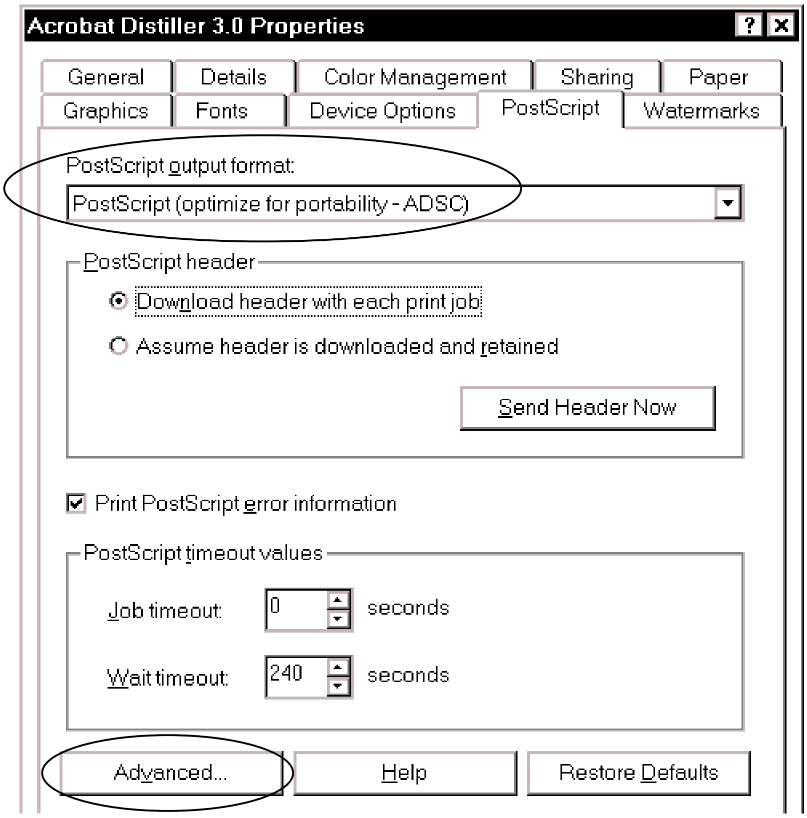


Figure 146. Setting PostScript printer driver options

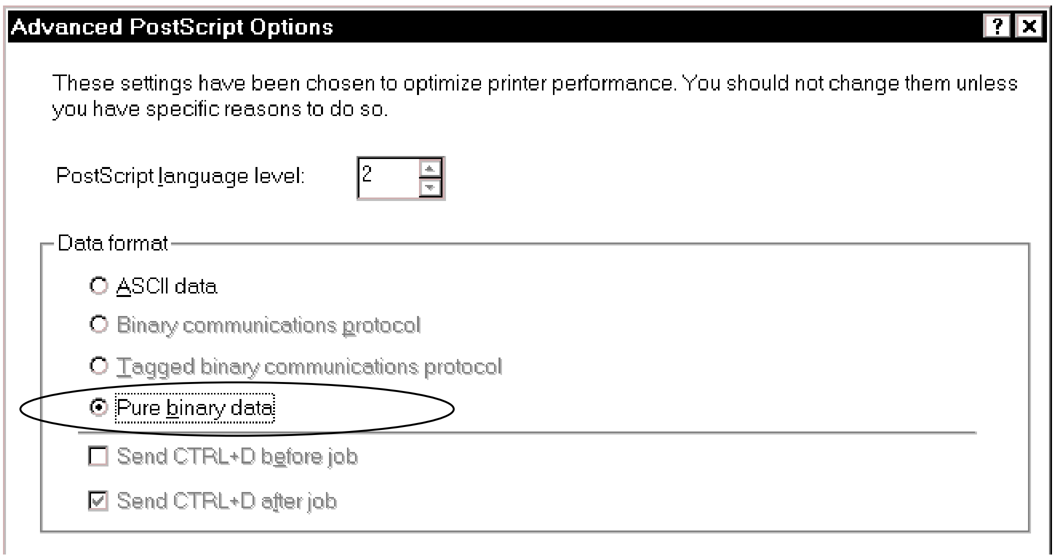


Figure 147. Setting advanced PostScript printer driver options

Print to a PostScript file

1. Make sure you have set up your system as described in “Install and set up the necessary software on your computer“ on page 191.
2. In your word-processing or desktop publishing program, open the document to be distilled into PDF.
3. On the **File** menu, choose **Print**.

4. In the **Printer** section of the Print dialog (Figure 148), select **Acrobat Distiller** from the **Printer Name** list, select the **Print to file** checkbox, then click **OK**.

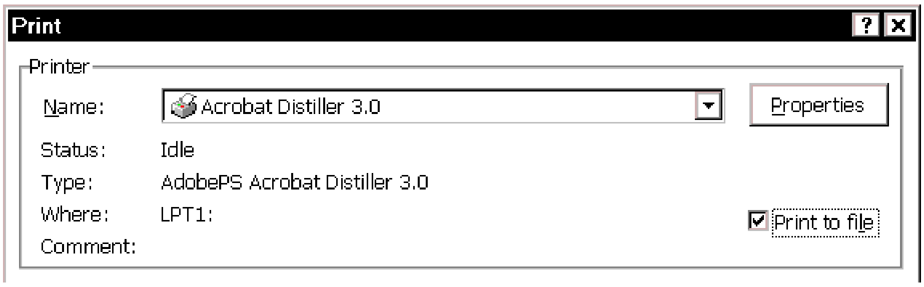


Figure 148. Selecting Acrobat Distiller and Print to file

5. On the Print to File dialog (not shown), select **All Files (*.*)** from the **Save as Type** list, choose the folder where you want to store the PostScript file, type a filename with the **.PS** extension (not .PRN, as some programs insert automatically), then click **OK**.

   The PostScript file is created and stored in the folder you selected. If you have a long, complicated document, this process could take a while.

Choose the distiller options

1. Open Acrobat Distiller.
2. On the **Distiller** menu, click **Job Options**.
3. Study the options carefully, and choose settings that optimize for the document’s purpose, which could be printing on a low-resolution local printer, printing on a high-resolution printer, or viewing online.

Here are some suggested settings for onscreen display (not pre-press).

On the **General tab** (Figure 149)

- Choose **Acrobat 3.0** from the **Compatibility** list.
- Clear the **ASCII format** checkbox.
- Type **600 dpi** in the **Default Resolution** box.

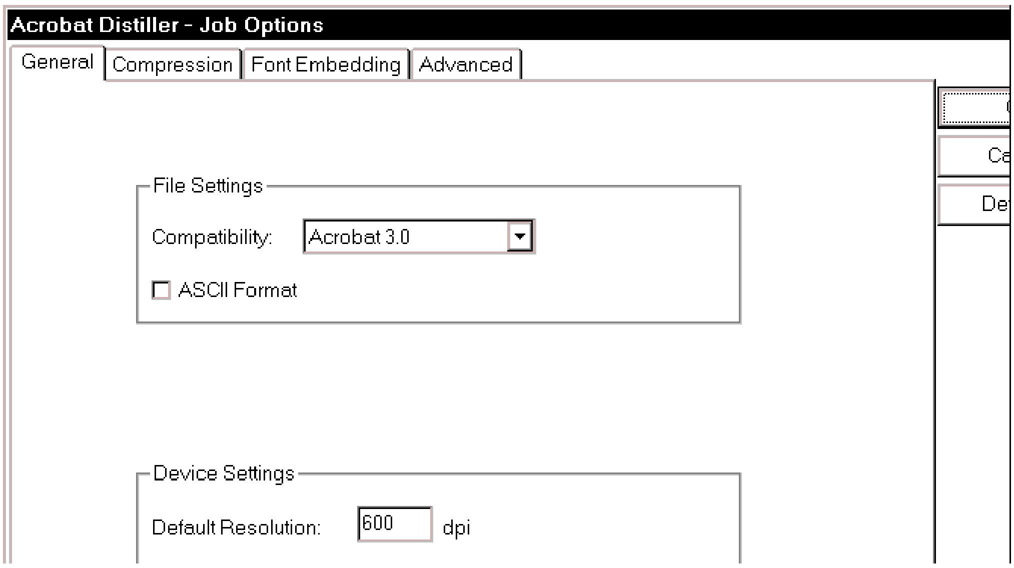


Figure 149. Setting general options for the distiller

On the **Font Embedding tab** (Figure 150)

- Select the **Embed All Fonts** checkbox.
- Select the **Subset fonts below** checkbox and specify **50%**.

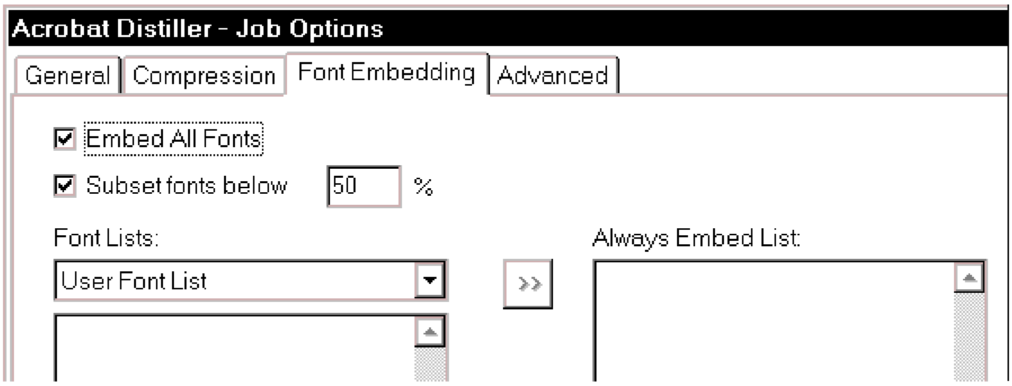


Figure 150. Selecting font embedding options for the distiller

On the **Compression tab** (Figure 151)

- Select the **Compress text and line art** checkbox.
- For color and grayscale images, select **Downsample to 72 dpi** and select **Automatic Compression**.
- For monochrome images, select **Downsample to 300 dpi**.

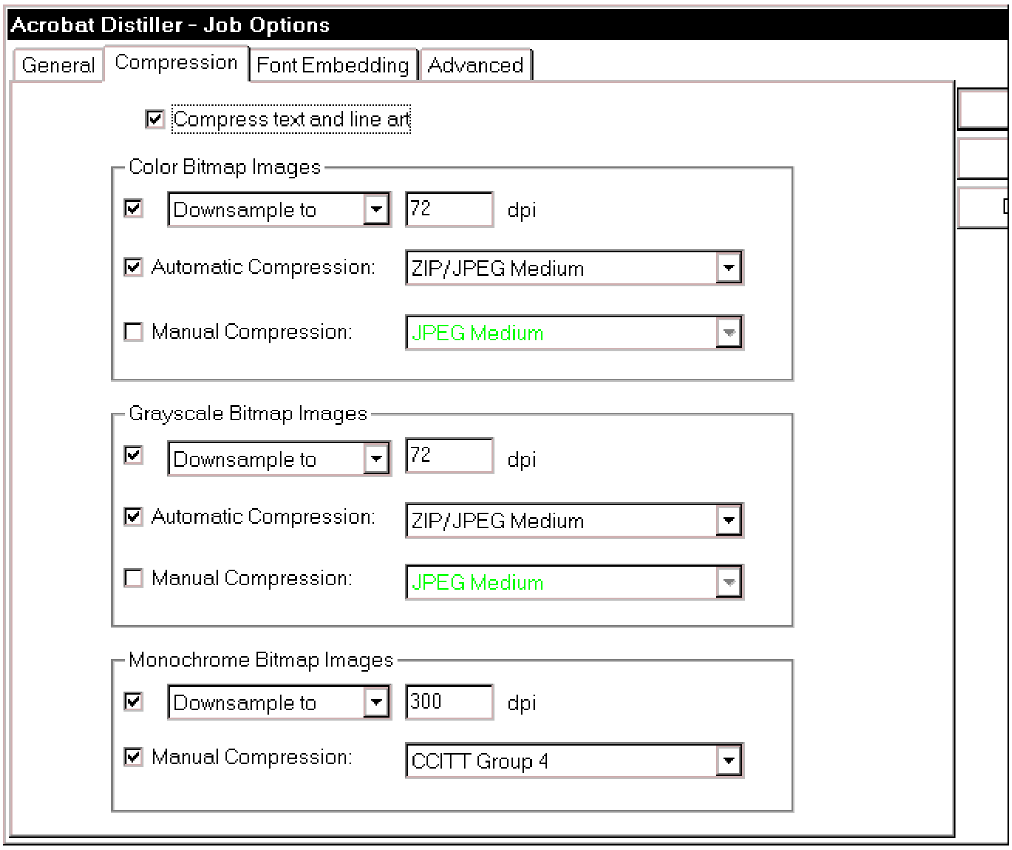


Figure 151. Selecting compression options for the distiller

Distill a PDF file from a PostScript file

1. Open Acrobat Distiller.
2. On the **File** menu, click **Open**. Find and select the PostScript file you created in "Print to a PostScript file" on page 192.
3. Choose **PDF Files (*.PDF)** on the **Save as type** list, make sure the filename and the folder shown are the ones you want, then click **Save**. Acrobat Distiller creates a PDF file and saves it in the selected folder. If you have a long, complicated document, this process could take a while.

Creating PDF documents using Adobe Acrobat 4

Create PDF documents using Adobe Acrobat 4 is generally easier than with Acrobat 3, because you need to do less "tweaking" to produce good results.

If you use Microsoft Office 97 on Windows 95 or 98, when you install Acrobat 4, be sure to install the macros for Office 97 applications, so you can create PDF files directly from those applications. The PDFMaker macro for Microsoft Word 97 and PowerPoint 97 can create PDF files using Acrobat Distiller or PDFWriter, and it supports new Acrobat features such as the retention of hyperlinks within a document.

Finding more information

In addition to the online guides provided on the Adobe Acrobat CD-ROM, you might find these sources useful:

Adobe Development Team, *Adobe Acrobat 4.0 Classroom in a book*, Adobe Press, 1999, ISBN 1568304765.

Adobe Systems Inc., *Adobe Acrobat 3.0 Classroom in a book*, Adobe Press, 1997, ISBN 1568303653.

PDFzone (© Knowledge in Motion) has discussion lists, resources, and links to other information about creating and using Adobe's PDF (Portable Document Format) files. http://www.pdfzone.com/resources/tips/

Blueworld (http://www.blueworld.com/) also has discussion lists. Go to http://www.blueworld.com/blueworld/acrobat.html for more information about the Acrobat list.

Appendix A
Backing up data and programs

Although you can back up everything on your computer (programs and data) at the same time, this practice can be quite time consuming (and take up a lot of space on your storage device). Most people back up programs separately from data.

This appendix discusses:

- Backing up data (documents and other files)
- Backing up programs

Backing up data (documents and other files)

Backing up your data is an essential part of your work. If you lose an hour's work because you forgot to save, that may be a nuisance; if you lose a day's work, you may be in serious trouble; if you lose a whole project, you could be out of business. And remember to keep a copy of your backups at some other location: what happens if your office is destroyed by fire, flood or earthquake?

Experienced independents recommend that, in addition to making backup copies of your documents and other files, you keep the working copies of your valuable documents on a different physical drive from the drive that holds the operating system, so you're never in a position where you cannot boot your computer and your valuable documents are on the bad drive. With two physical drives, you can almost always recover from problems without data loss or significant downtime, especially if you follow the suggestions in "Backing up programs."

For data backup, you can use any convenient method (such as a zip drive or a CD) that can handle the volume of data you need backed up. Don't forget to include such things as your e-mail files, personal templates, and so on, that may be stored in obscure folders.

Backing up programs

The program backup techniques described here are great for two situations:

- The fairly common case of unwanted software—writers and editors often have to install software for test purposes; when you no longer need the software, you may uninstall it, but it often leaves unwanted files on your hard disk. Power users recommend that you reformat your hard disk every six to twelve months and reinstall the programs you actually use.
- Virus infection, or any system crash, that causes loss or corruption of program files—you have no choice except to reinstall programs (after disinfecting or—even better—reformatting the hard disk).

In either case, reinstalling hundreds of megabytes of software is a slow, tedious process, and when you're done, you have to make all those little changes to set it up just the way you like to work. How much better if you have an "image" of your setup stored somewhere, so you can simply copy it onto your hard disk, all set up and customized, ready to use.

Here's how to do this at home:

1. Purchase and install the necessary hardware.
2. Purchase and install software.
3. Make an image of your hard drive, or copy the contents of the drive.
4. When necessary, restore the image or copy of the drive contents.

Step 1. Purchase and install hardware.

If you don't feel comfortable poking around in the guts of your computer (I sure don't!), you may want to get a techie to do some of this for you, or specify what you want when you buy a new machine. A neighbor's computer-savvy teenager (if you don't have one of your own) can be very useful if you need to retrofit an existing machine.

1. When buying a new computer, be sure you get a case with enough full-height drive bays to hold at least two hard drives in addition to a floppy drive and a CD-ROM drive.

If you are retrofitting an existing computer which doesn't have enough drive bays, either get a bigger case or get an external hard drive case.

2. Buy two removable hard drive carriers and fit them into the computer's case. Your existing hard drive can go into one of these carriers. (You may have to hunt around a bit to find a source of removable carriers; check mail-order suppliers of computer parts if you don't have a convenient component store that stocks them, or ask that helpful teenager.)
3. Buy an extra hard drive (you could use this as an excuse to buy a bigger drive to use as your main drive), or salvage a drive from an older computer. The backup drive can be smaller than your existing drive, as long as it's big enough to take the files you're going to be backing up—depending on the software you choose in the next step, you may be able to compress the files considerably. Fit the extra hard drive into the second removable drive carrier.

Step 2. Purchase software.

1. Decide whether you want to:
   - Copy the contents of one hard drive to another, so you can use the new drive in addition to (or in place of) the old one. (This technique is the one to use when you want to copy all the contents to a larger drive, to be used as your main drive.)
   - Compress the contents of the working drive and store it as a backup. In this case your backup takes up less space on the drive but you can't use it without restoring and decompressing it. This technique is best if you want to use a smaller drive for the compressed backup, and is called "making a drive image." It's also popular with network administrators, who keep a "standard image" on a file server, to download to any new or reformatted hard drive.
2. Buy a copy of one of these programs (available from many software resellers; see "Finding more information" on page 200), depending on your needs:
   - To compress contents and make an image of a drive setup, choose DriveImage 2.0 from PowerQuest (note: **not** DriveImage Pro, which is for networks and costs far more than the single-machine DriveImage program), Norton Ghost Personal Edition from Symantec, or an equivalent program. Go to "Step 3a. Make an image of a new drive setup."
   - To copy but not compress contents, choose DriveCopy 2.0 from PowerQuest, DiskClone 1.0 for Windows from Symantec, or an equivalent program. Go to "Step 3b. Copy an existing drive."

Step 3a. Make an image of a new drive setup.

1. Start with a clean, formatted drive. If Windows is pre-installed, that's okay. Set up Windows the way you like it. Do as much tweaking as possible.
2. Install other programs you use regularly. Do all the customizing you want. Get everything set up, as much as possible, the way you'd like it to be for everyday use. **Do not** do any real work or install test software at this point.
3. Use DriveImage to make an "image" of this disk on your backup hard disk (follow the instructions that come with the program).
4. Take the removable part of the hard drive carrier (containing the backup hard disk) out of the computer and store it safely (preferably in other location). If you want to use the disk carrier again, you can take the drive completely out of the carrier and store only the drive. You can now use the carrier to hold another working drive.

Step 3b. Copy an existing drive.

Follow the instructions for the program you chose in "Step 2. Purchase software."

Step 4. When necessary, restore the drive.

If you've made an image of the drive, put the new (or newly formatted) main hard disk in the "primary" drive carrier slot, and the backup hard disk in the "secondary" drive carrier slot. Follow the instructions with your software to move the programs from the backup drive to the new drive.

If you've copied the drive (rather than taking an image), you can simply remove the problem drive and insert the backup drive.

In both cases, after restoring the programs, you'll need to restore your documents and other data from wherever you back them up.

Finding more information

The programs listed here are available from a wide range of software resellers, as well as directly from the companies that produce them. Mention of these programs does not consistitue endorsement of any of them. Other programs may be available that do much the same things.

DiskClone (Symantec)
 http://www.symantec.com/sabu/qdeck/diskclone/mainreg.html

Norton Ghost Personal Edition (Symantec)
 http://www.symantec.com/press/1999/n990802b.html

DriveCopy (Powerquest)
 http://www.powerquest.com/drivecopy/index.html
 (English language version for North Americans)

 http://www.powerquest.com/en/drivecopy/index.html
 (English language version for non-North Americans)
 Other language versions available.

DriveImage (Powerquest)
 http://www.powerquest.com/driveimage/didetail.html
 (English language version for North Americans)
 http://www.powerquest.com/en/driveimage/didetail.html
 (English language version for non-North Americans)
 Other language versions available.

Appendix B
Managing your e-mail when traveling

Many editors (traditional as well as electronic) communicate as much or more by e-mail these days as they do using the telephone. If you're in that situation, you may need to collect your e-mail when away from your home or office. Perhaps you're attending a professional conference, or you need to visit clients at their offices, or you might have family obligations that require you to spend time somewhere else. In each case, you may need to keep in touch with your clients and your work.

Collecting and sending e-mail when you're away from the office can be easy or frustratingly difficult, depending on your situation.

In most cases, all you need to collect your e-mail is some way to connect your computer to the Internet—usually a phone number, username and password for any internet service provider (ISP). Once you are connected to the Internet, you can pick up e-mail from any account anywhere, as long as you know the account name, address and password.

Well, almost any account—it needs to be:

- Either a POP3 account (explained later), or an account that has a Web-based access method. (Web-based access can be optional, as with AOL, or the only access method, as with HotMail or Yahoo! CompuServe accounts will soon be optionally accessible this way, too—possibly before this book is published.) If you're collecting your e-mail using any of the programs described in this chapter, you probably have a POP3 account. If you're on CompuServe, you can optionally set up your account to be POP3; GO POPMAILfor details.
- Not on a company server that's accessible only through a direct dial-up number to the company's intranet. If your account is on a company server, see "Collecting e-mail from a company account" on page 202.

This appendix describes how to manage your e-mail in several common situations:

- Collecting e-mail from a company account
- Avoiding long-distance phone charges
- Dealing with attachments
- Collecting e-mail using your own computer and account
- Collecting e-mail using your own computer and someone else's account
- Collecting your e-mail using someone else's computer
- Collecting your e-mail using a public-access internet connection

Collecting e-mail from a company account

If you're collecting e-mail from a company account, be sure to find out before you leave:

- What phone number to use to dial in, and how to set up (or change) that number in your e-mail software.
- What if any programs, setups, or passwords you need to enable you to collect your e-mail remotely. For example, to collect Lotus Notes e-mail, you need to have Notes installed on your computer and configured to "replicate" your e-mail database on the company intranet.

Your system administrator should be able to tell you what you need and how to set it up. Arrangements vary so much that I can't begin to give you a step-by-step procedure.

Another possibility is to have your e-mail redirected to your personal account while you're away from the office. You'll probably need to ask your system administrator how to redirect mail, and be sure to test that it works—before you leave on the trip!

Avoiding long-distance phone charges

If your ISP doesn't have a local dial-up number where you're going, or a 1800-number you can call, you have two choices to avoid making a long-distance call:

- Get a second account with an ISP that does have a local telephone number where you're going and connect to the Internet through that account.
- Use someone else's account to dial a local telephone number and connect to the Internet.

In both cases, once you are connected to the Internet, you can collect your mail from your usual e-mail account, as described in:

- "Collecting e-mail using your own computer and account"
- "Collecting your e-mail using someone else's computer" on page 205

Dealing with attachments

Downloading large attachments can be a problem, either because you're using your own machine but running up a large hotel telephone bill, or because you're using someone else's machine and the files are too large to fit on a diskette. You therefore need to ensure that your mail doesn't download automatically, and that it stays on the server until you download it or delete it. Somewhere in the settings for your account (noted on the figures in "Collecting e-mail using your own computer and someone else's account" starting on page 205) will be a checkbox for "leave mail on server" and another one to skip messages over a certain size. Select settings that are relevant to your situation.

Collecting e-mail using your own computer and account

Here's what to do when you have your own computer and a local telephone number for your ISP:

1. Compose and queue messages offline, if possible.
2. Change your dial-up information to use a different telephone number.
3. Dial in to the new telephone number and connect to the Internet (see page 204).
4. Open your e-mail program and send and receive your mail as usual.

Compose and queue messages offline

If your e-mail program allows you to compose and queue outgoing messages without being connected to the Internet, open it, and prepare those messages that you are ready to send.

Change your dial-up information to use a different telephone number

I recommend that you don't change your normal account information. Instead, to change your dial-up information, first create a new icon for your traveling needs. You can change phone numbers in it as often as you need, without accidentally losing (or forgetting) your normal dial-up information.

You can set up a separate "traveling connection" icon before you leave home:

1. Open Windows' Dial-Up Networking folder (Figure 152). In Windows 95, this folder is usually found under **Programs > Accessories**; in Windows 98, it's usually found under **Programs > Accessories > Communications**.
2. Double-click the **Make New Connection** icon.

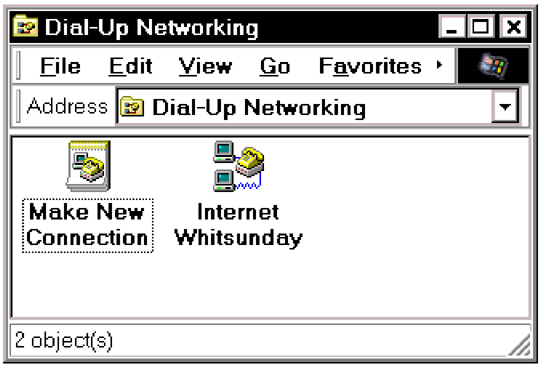


Figure 152. Choosing the Make New Connection icon

3. On the first page of the Make New Connection wizard (Figure 153), give the connection a name, then click **Next**.

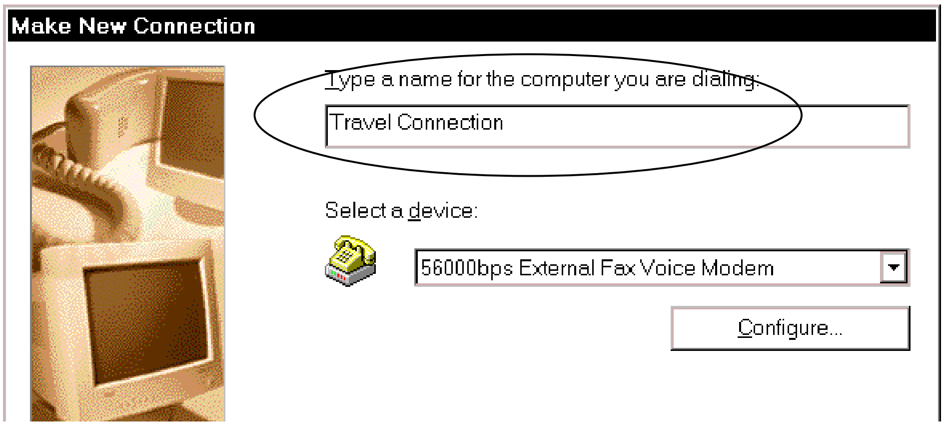


Figure 153. Naming the new Internet connection

4. On the next page of the wizard (Figure 154), fill in the telephone number information and click **Next**. If you don't know what phone number you'll be using, just put in a fake one and change it later when you find out the real one.

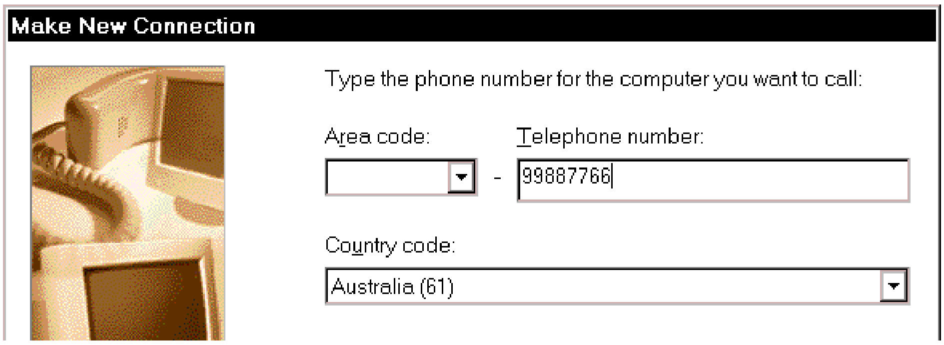


Figure 154. Typing the telephone number for the new connection

5. On the next page, click **Finish**.
6. Make a shortcut (icon) on the desktop for the Travel Connection.

Dial in to the new telephone number and connect to the Internet

The first time you use the new connection, don't let your e-mail software dial it automatically. First verify that the information is correct:

1. Double-click on your **Travel Connection** icon.
2. On the Connect To dialog (Figure 155):
   - Check that your **User name** is correct, or change it if necessary (for example, if you are using your second account or someone else's account).
   - Type the password for the dial-up account you are using, but don't select the **Save password** checkbox (for security reasons).
   - Verify the telephone number, then click **Connect**.

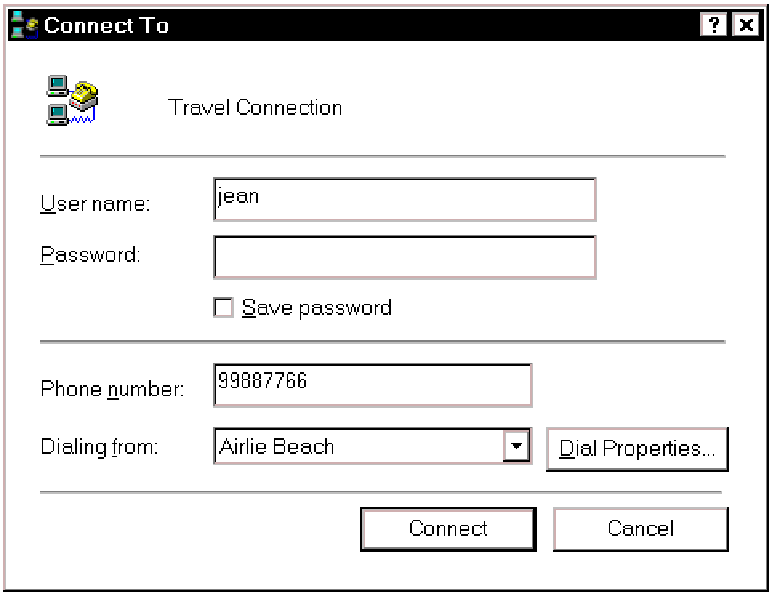


Figure 155. Checking your user name and connection telephone number

Note: The next time you use this connection, the user name and telephone number will be those you used this time. You can either set up your e-mail software to use this connection automatically, or you can continue to make the connection manually.

Open your e-mail program and send and receive your mail as usual

I hope you don't need to be told how to do this!

Collecting e-mail using your own computer and someone else's account

As noted in the introduction to this Appendix, all you need is some way to connect your computer to the Internet, using any internet service provider (ISP) anywhere in the world. Once you are connected to the Internet, you can pick up e-mail from any account anywhere (with the restrictions mentioned on page 201).

Sometimes the cheapest and easiest way to get your e-mail is to connect to the Internet using someone else's account. For example, when traveling in the USA, I could connect to the Internet through a friend's account on compuserve.com and collect my e-mail from my ISP (whitsunday.net.au) in Australia.

1. Follow the steps in "Collecting e-mail using your own computer and account" on page 202 to set up a Travel Connection icon, if you haven't already done so.
2. On the Connect To dialog (Figure 155), type the other person's user name, password, and phone number.
3. After you are successfully connected to the Internet, receive and send your e-mail as usual. Because your mail server information is in the account settings, you don't have to do anything else.

Collecting your e-mail using someone else's computer

Using someone else's computer to collect your e-mail can be a bit complicated, especially if you've never done it before, but with a bit of planning you should not have any problems.

Note: if you're using a Web-based e-mail account (HotMail, Yahoo!, AOL's NetMail, or similar), you can skip steps 1, 2 and 5 below. All you need is your user name and password, and a connection to the Internet.

If you don't have a Web-based e-mail account, here's what you need to do:

1. Before you leave home, collect this information about your e-mail account:
   - Your e-mail address (the address people use when they send mail to you)
   - Your password
   - Your incoming mail server user name
   - Your outgoing mail server user name
   - The name of the incoming mail server for your account
   - The name of the outgoing mail server for your account

   This chapter will help you find the last four items.
2. In the e-mail program available on the machine you're using, set up a new account using your account information. Don't change any of their account information—your colleague won't appreciate it!

   Note: Do not leave your e-mail password on anyone else's machine. Be sure **not** to choose a setting that allows the program to "remember" your password.
3. Connect to the Internet, using either your own ISP or someone else's.
4. Collect your e-mail.
5. Remove your account information from the computer you're using (not necessary for Web-based services).

I'll discuss each of these steps in the following sections, for three commonly available (and free) e-mail programs, Netscape Communicator, Outlook Express, and Eudora Light. If you must use a program that is not listed, these instructions should give you enough information to apply to the available program.

Using Netscape Communicator 4.5

Step 1. Collect your account information before you leave home

1. On the **Edit** menu, click **Preferences**.
2. To find the incoming and outgoing mail servers for your account, go to the **Mail Servers** page in the Preferences (Figure 156).

   Usually the two server names are the same, but sometimes they are different, as in this example.
3. To find your mail server user name, click the **Edit** button in the Incoming Mail Servers section of the Mail Servers Preferences to display the Mail Server Properties dialog.

   On the **General** tab (Figure 157), fill in the necessary information. Usually your mail server user name is the same as the first part of your e-mail address, but sometimes they are different, as in this example.

   On the **POP** tab (Figure 158), select both checkboxes.

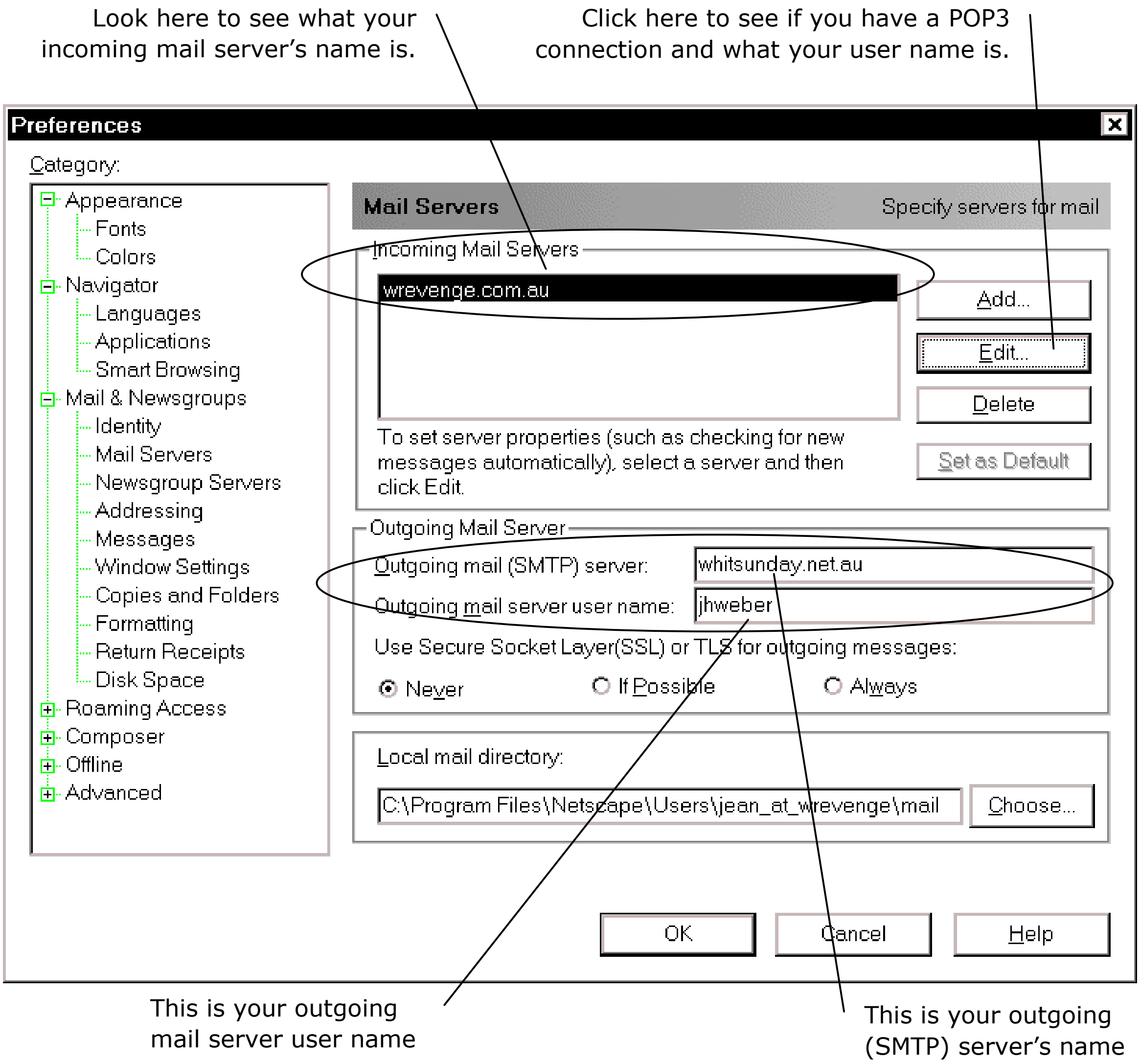


Figure 156. Finding the incoming and outgoing server details in Netscape

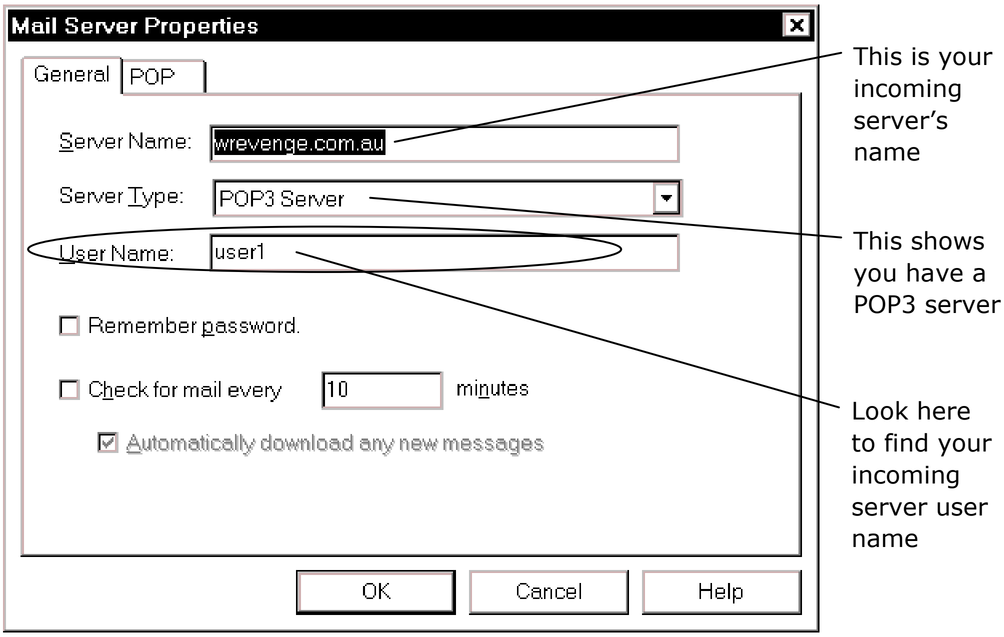


Figure 157. Finding your incoming server user name using Netscape

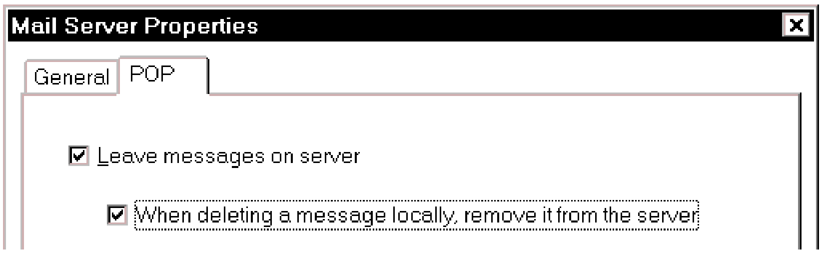


Figure 158. Leaving messages on the server using Netscape

Step 2. Set up your account information on the other computer

1. Close Netscape if it is open.
2. Open Netscape's **User Profile Manager** (usually found under **Programs > Netscape > Utilities**).
3. On the Profile Manager dialog (Figure 159), click **New**, read the instructions on the next page, then click **Next**.

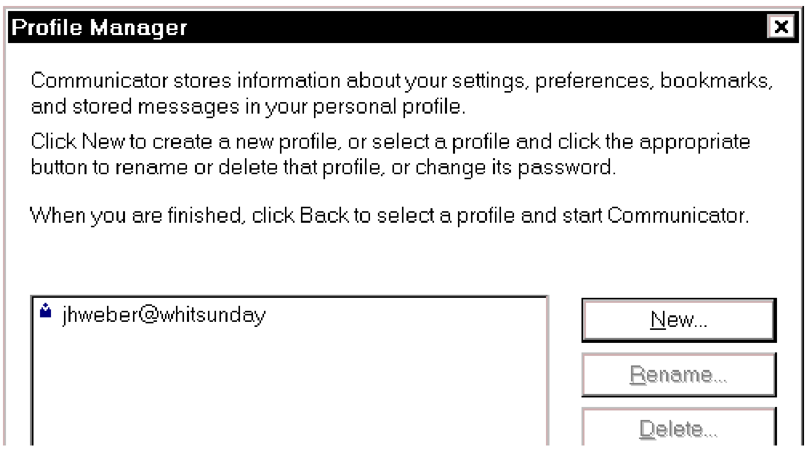


Figure 159. Starting Netscape's Profile Manager

4. On the Enter your Name and Email Address dialog (Figure 160):
    - In the upper box, type your name as you want it to appear in your outgoing messages.
    - In the lower box, type the e-mail address you want to collect your mail from—the e-mail address you normally use.

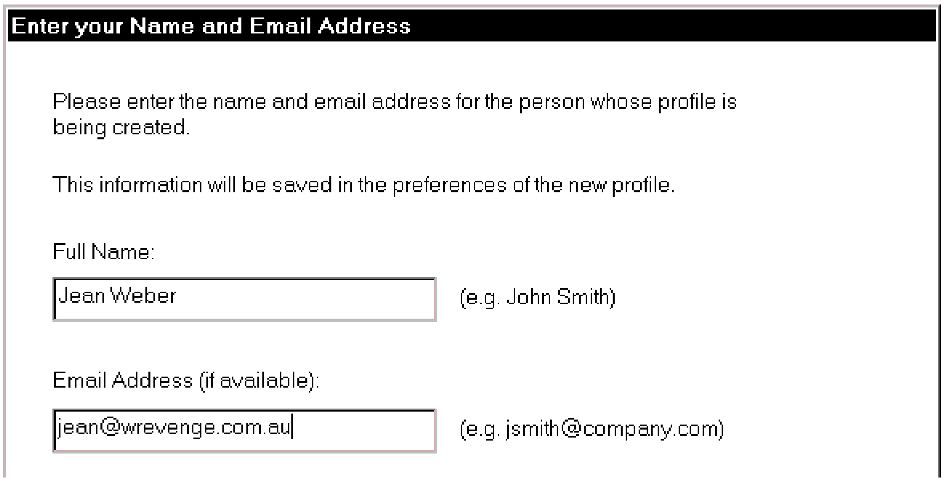


Figure 160. Entering your name and e-mail address in Netscape

5. Click **Next**. On the Choose a Name and Directory for your Profile dialog (Figure 161):
    - In the upper box, type a name for this profile. This name is just for your own convenience and does not need to have anything to do with the name you use for e-mail.

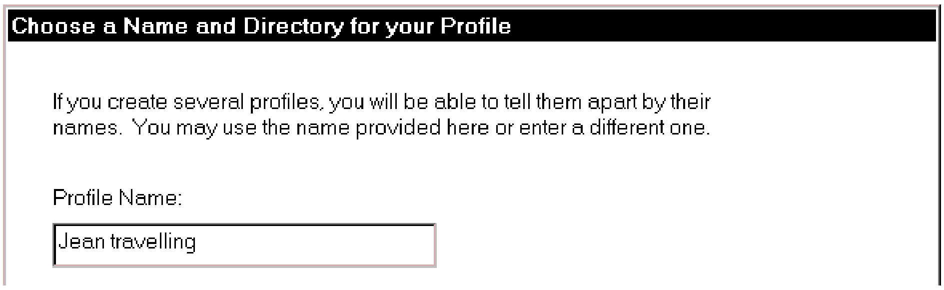


Figure 161. Choosing a profile name and a directory for your profile in Netscape

6. Click **Next**. On the Set up your Outgoing Mail Server dialog (Figure 162), type the outgoing mail server information you recorded in your normal setup.

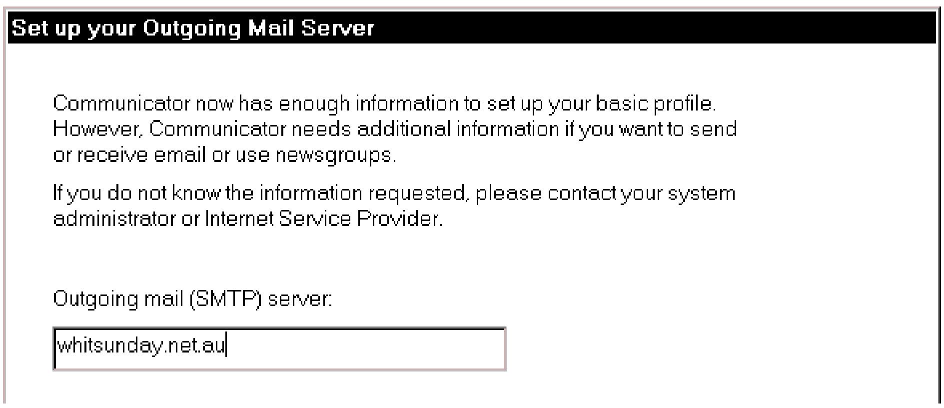


Figure 162. Entering the name of your outgoing mail server in Netscape

7. Click **Next**. On the Set up your Incoming Mail Server dialog (Figure 163), type the same information you have recorded in your normal setup.

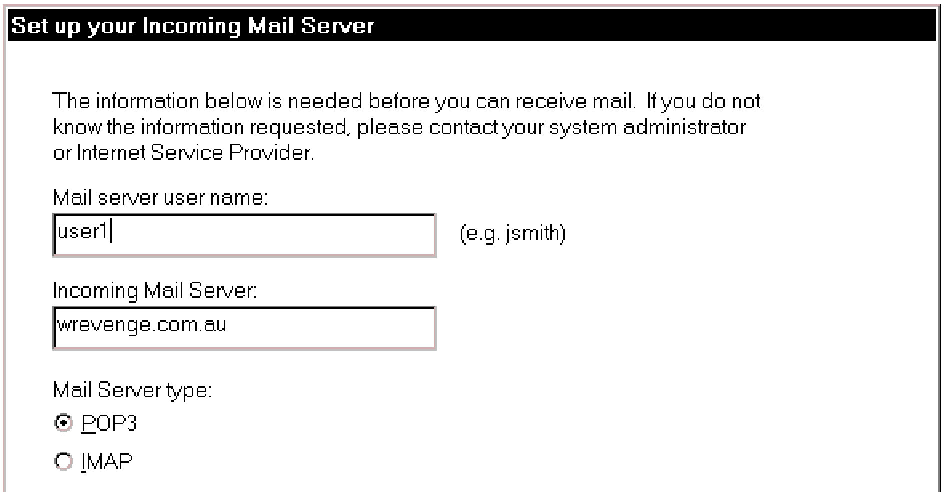


Figure 163. Entering information about your incoming mail server in Netscape

8. Click **Finish**. Netscape sets up a new profile for you. Note that you did not record your password while setting up this profile, so even if you forget to delete the profile after you've collected your mail, no one else can access your account.

Step 3. Connect to the Internet

If the machine you are using is not on a permanent Internet connection, you need to dial in as usual.

- If you are dialing in to your own account, be sure your account information is shown in the Connect To dialog (Figure 155 on page 204).
- If you are using someone else's account, be sure that person's account information is shown in the Connect To dialog.

Step 4. Send and receive your e-mail

Because your mail server information is in the account settings, you can now collect your e-mail as usual. Read and reply to your mail, then delete any mail you don't want to keep. (If you are on a dial-up connection, you can log off now.)

Step 5. Remove your account information from the computer

Close Netscape, open the Profile Manager, select the profile you created, then click **Delete**.

Using Outlook Express 98

Step 1. Collect your account information before you leave home

1. On the **Tools** menu, click **Accounts**.
2. On the **Mail** page of the Internet Accounts dialog, choose your account and click the **Properties** button.
3. On the **Servers** tab of the Account Properties dialog (Figure 164), you can see the incoming and outgoing server names, and your logon user name.

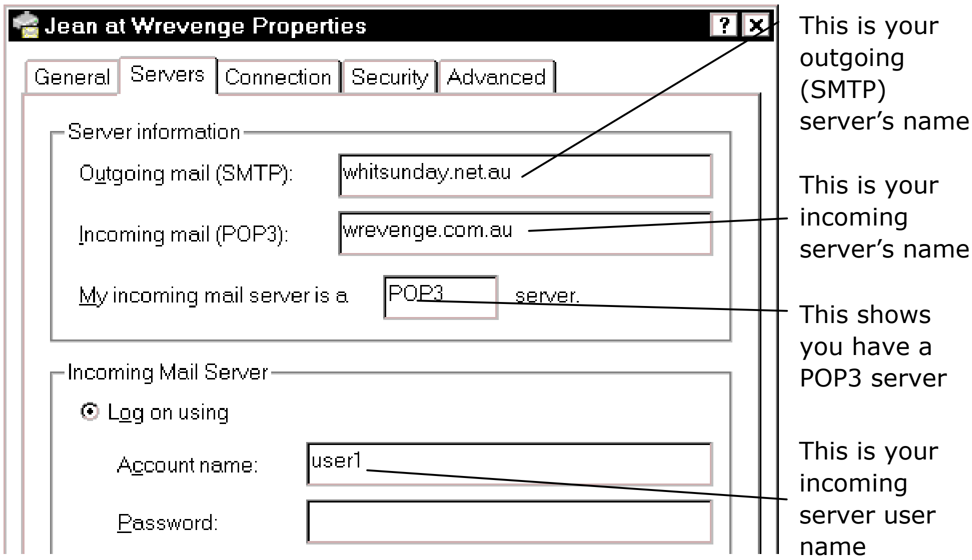


Figure 164. Looking up incoming and outgoing server information in Outlook Express

4. On the **Advanced** tab (Figure 165), you can choose to leave your messages on the server until you delete them.

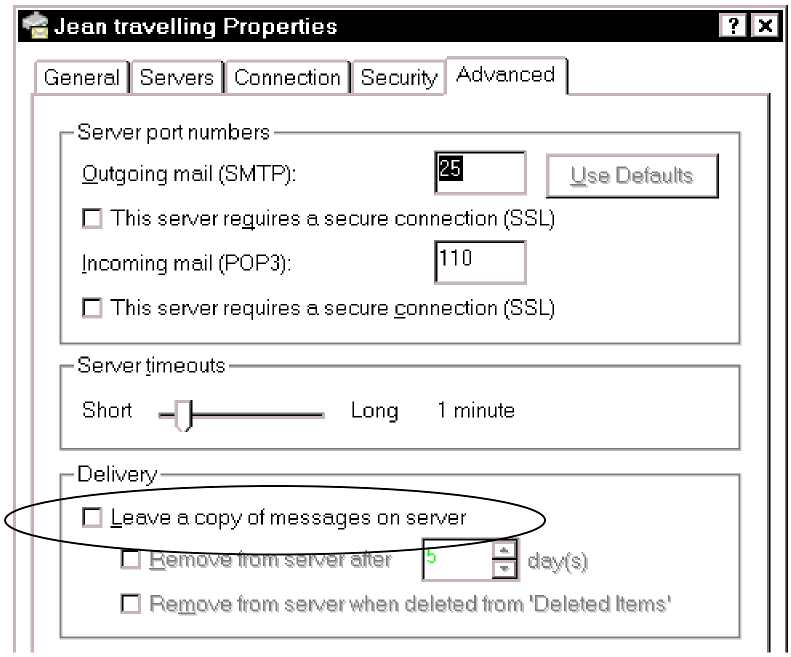


Figure 165. Leaving messages on the server using Outlook Express

Step 2. Set up your account information

1. On the **Tools** menu, click **Accounts**, select the **Mail** tab (Figure 175), then click the **Add** button and select **Mail.**
2. On the first page of the Internet Connection Wizard, type your name, then click **Next**.
3. On the Internet E-mail Address page of the wizard (Figure 166), type your e-mail address, then click **Next**.

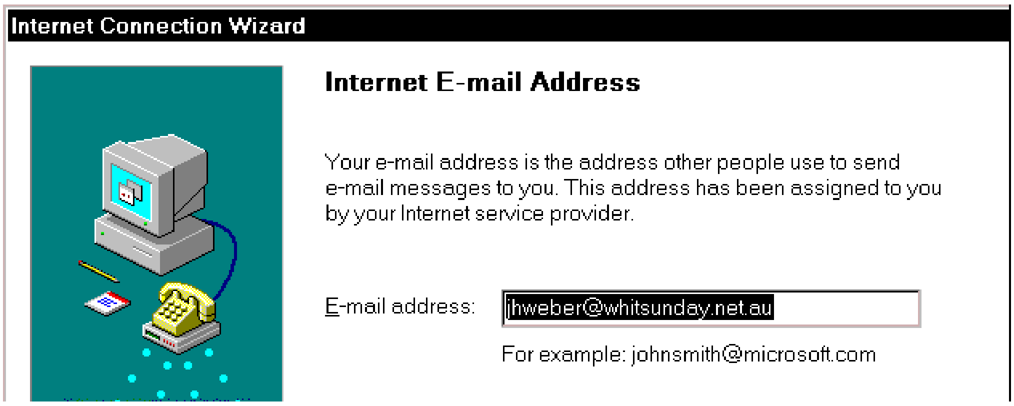


Figure 166. Typing your e-mail address for a new account setup

4. On the E-mail Server Names page of the wizard (Figure 167), type your incoming and outgoing server names, then click **Next**. .

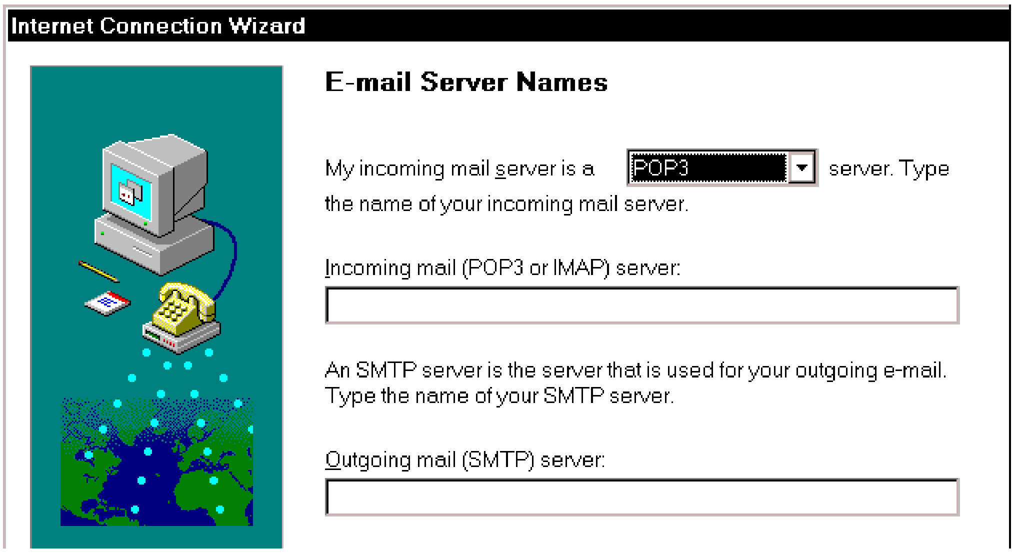


Figure 167. Typing your incoming and outgoing server names for a new account setup

5. On the Internet Mail Logon page of the wizard (Figure 168), type your account name, **leave the password box blank**, then click **Next**.

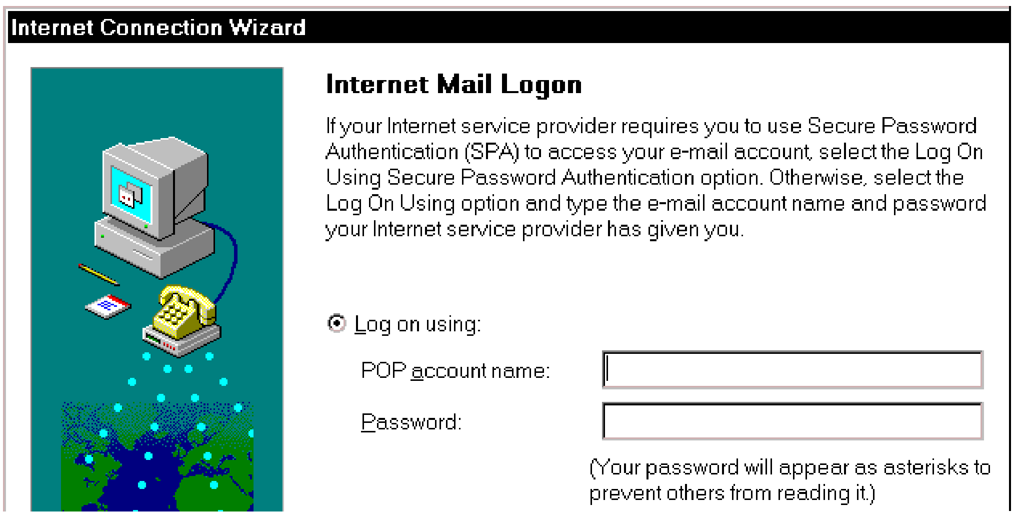


Figure 168. Typing your incoming user name for a new account setup

6. On the Friendly Name page of the wizard, type a name to help you remember which account this is.
7. On the Choose Connection Type page of the wizard (Figure 169), select **I will establish my internet connection manually**, then click **Next**.

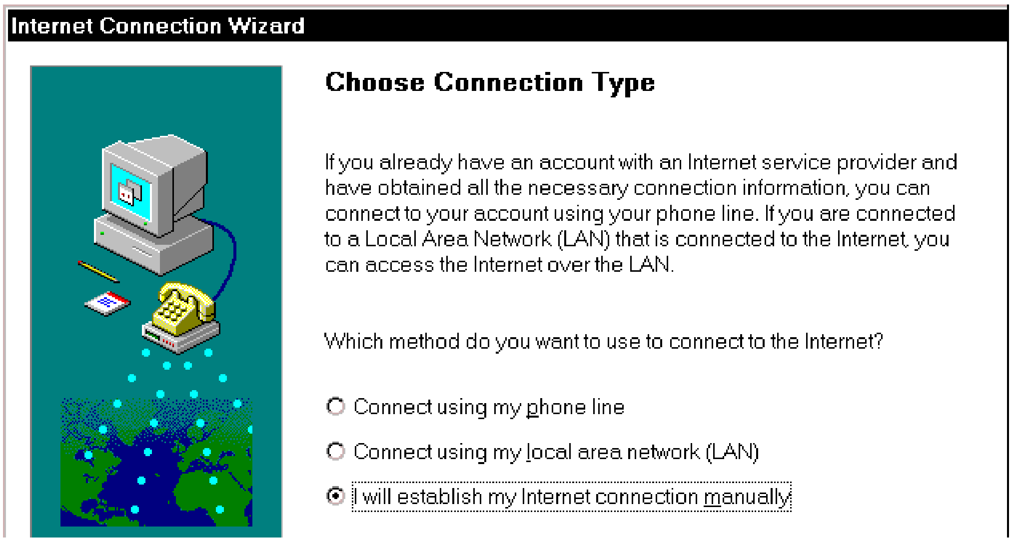


Figure 169. Specifying your connection type as a manual connection

8. On the next page of the wizard, click **Finish**.

Step 3. Connect to the Internet

If the machine you are using is not on a permanent Internet connection, you need to dial in as usual.

- If you are dialing in to your own account, be sure your account information is shown in the Connect To dialog (Figure 155 on page 204).
- If you are using someone else's account, be sure that person's account information is shown in the Connect To dialog.

Step 4. Send and receive your e-mail

Because your mail server information is in the account settings, you can now collect your e-mail as usual. Read and reply to your mail, then delete any mail you don't want to keep. (If you are on a dial-up connection, you can log off now.)

Step 5. Remove your account information from the computer

1. In Outlook Express, go to the **Tools** menu and click **Accounts**.

2. On the Internet Accounts dialog (Figure 175), select the account you created, then click **Remove**.

Using Eudora Light 3.0

Step 1. Collect your account information before you leave home

1. On the **Tools** menu, click **Options**.
2. Click the **Personal Info** icon in the left-hand pane. You can see your incoming server's user name.

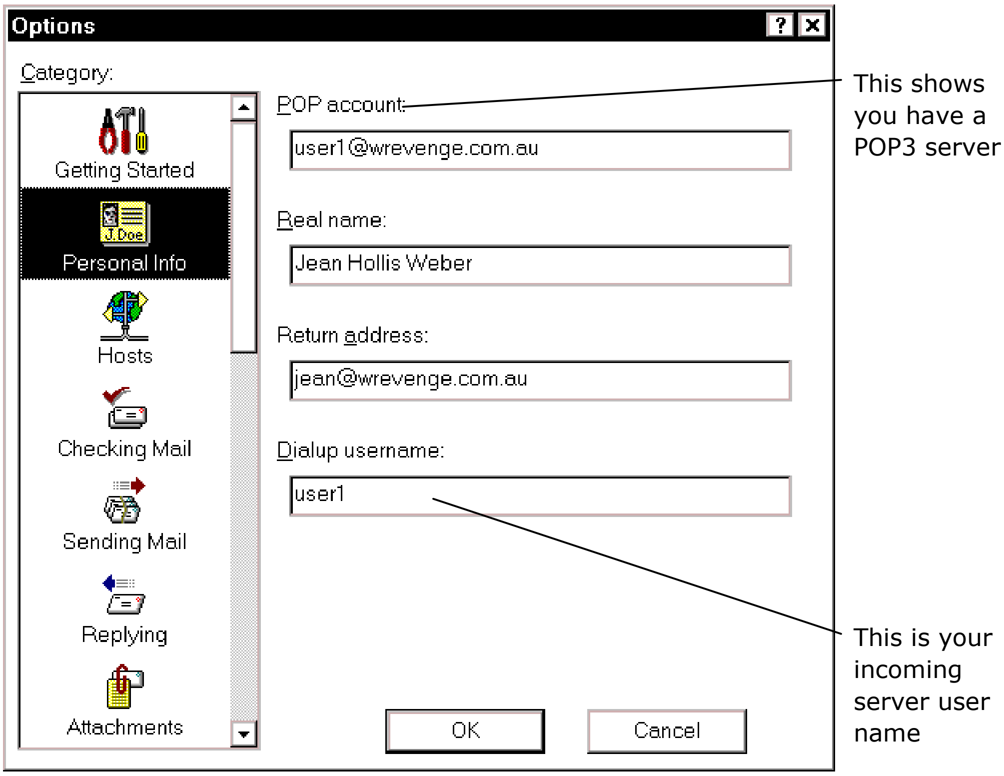


Figure 170. Looking up incoming server information in Eudora Light

3. Click the **Hosts** icon in the left-hand pane. You can see your outgoing (SMTP) server's name.

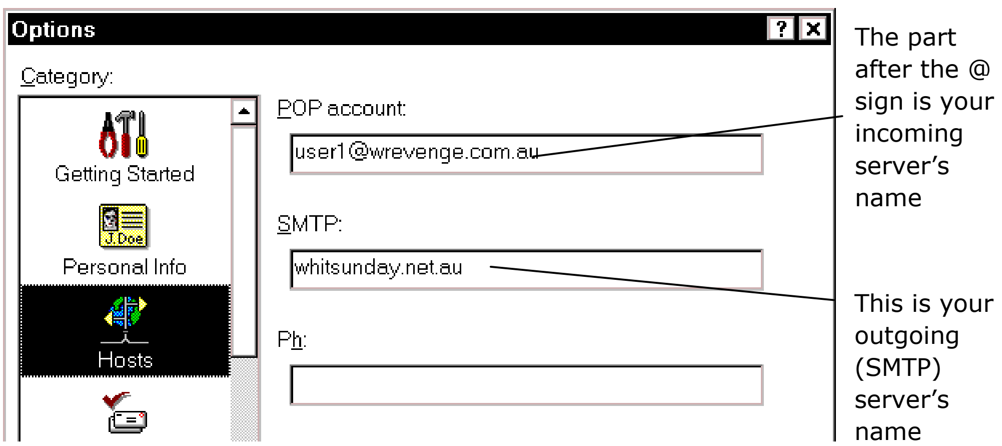


Figure 171. Looking up incoming and outgoing server information in Eudora Light

4. Click the **Checking Mail** icon in the left-hand pane. You can choose to delete the mail from the server after a specified number of days, if you wish.

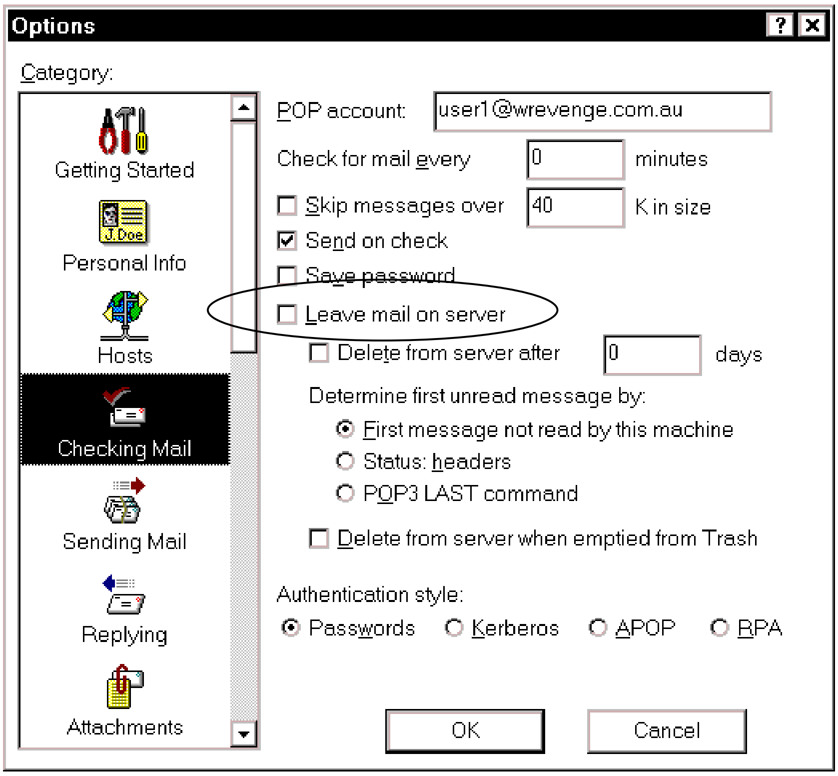


Figure 172. Leaving mail on the server using Eudora Light

Step 2. Set up your account information on the other computer

1. Create a new folder for your e-mail and copy eudora.ini into that folder, or copy eudora.ini onto a diskette. (You can find eudora.ini in the Eudora folder, usually located in C:\Program Files\Eudora.)
2. Right-click on the desktop, point to **New**, and click **Shortcut**.
3. On the first page of the Create Shortcut wizard (Figure 173), browse to the Eudora folder and select eudora.exe.
4. Still on that page of the wizard, click after the quotation mark (") at the end of the line, press the spacebar once, then type the location of the eudora.ini file you just copied. For example, if you put it on a diskette, you would type:

   a:\eudora.ini

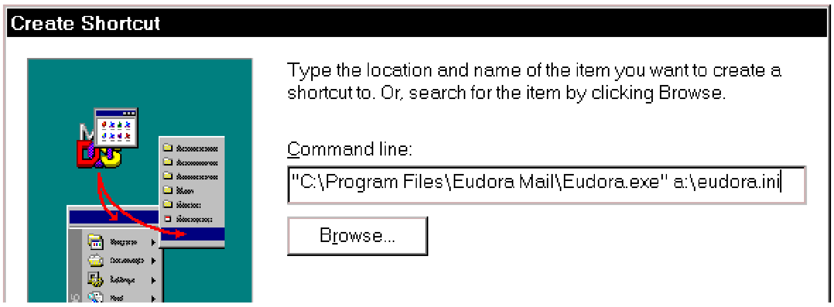


Figure 173. Creating a shortcut to your Eudora.ini file

5. Click **Next**, give the shortcut a name, and click **Finish**.
6. Double-click on the new shortcut (icon) to open Eudora Light.
7. On the **Tools** menu, click **Options**.

8. Click the **Personal Info** and **Hosts** icons in the left-hand pane (see Figure 170 and Figure 171) and change the settings to the ones you recorded from your setup at home.
9. Use this shortcut whenever you access your e-mail from this machine. All of your incoming, outgoing and other mailboxes will be placed in the folder you set up (or on the diskette, if you used that method). You can then take the diskette with you and use it again at your next stop.

Step 3. Connect to the Internet

If the machine you are using is not on a permanent Internet connection, you need to dial in as usual.

- If you are dialing in to your own account, be sure your account information is shown in the Connect To dialog (Figure 155 on page 204).
- If you are using someone else's account, be sure that person's account information is shown in the Connect To dialog.

Step 4. Send and receive your e-mail

Because your mail server information is in the account settings, you can now collect your e-mail as usual.

Step 5. Remove your account information from the computer

If you are using a diskette, all of your account information is on your diskette. Delete the icon you placed on the desktop.

If you set up a folder for your e-mail, delete the folder and all its contents.

Collecting your e-mail using a public-access internet connection

In some cases, public-access terminals only cater for Web-based e-mail access. In other cases, you can collect mail from POP3 accounts as described in this section.

To collect your e-mail, you need to follow the same steps as described in "Collecting your e-mail using someone else's computer" starting on page 205, with two exceptions:

You may find it easier and faster to change existing account information (which is probably the name of the last person to use this machine).

These machines are usually on a permanent Internet connection, so you don't have to dial-up a telephone number.

Here are the steps:

1. Change existing account information to yours
2. Collect and send mail as usual
3. Delete your account information

Change existing account information to yours

A public-access terminal might be set up to accept your user information on a form that is different from the ones supplied with the usual e-mail readers. If that is the case, use whatever form is presented to you. Otherwise, here are the instructions for filling your information into an existing account (probably set up as "Guest" or a similar name), using Netscape Communicator, Outlook Express or Eudora Light.

Changing an existing account in Netscape Communicator 4.5

1. Open Netscape Communicator.
2. On the **Edit** menu, click **Preferences**.
3. On the **Identity** page of the Preferences (Figure 174), fill in your name, email address and reply-to address.

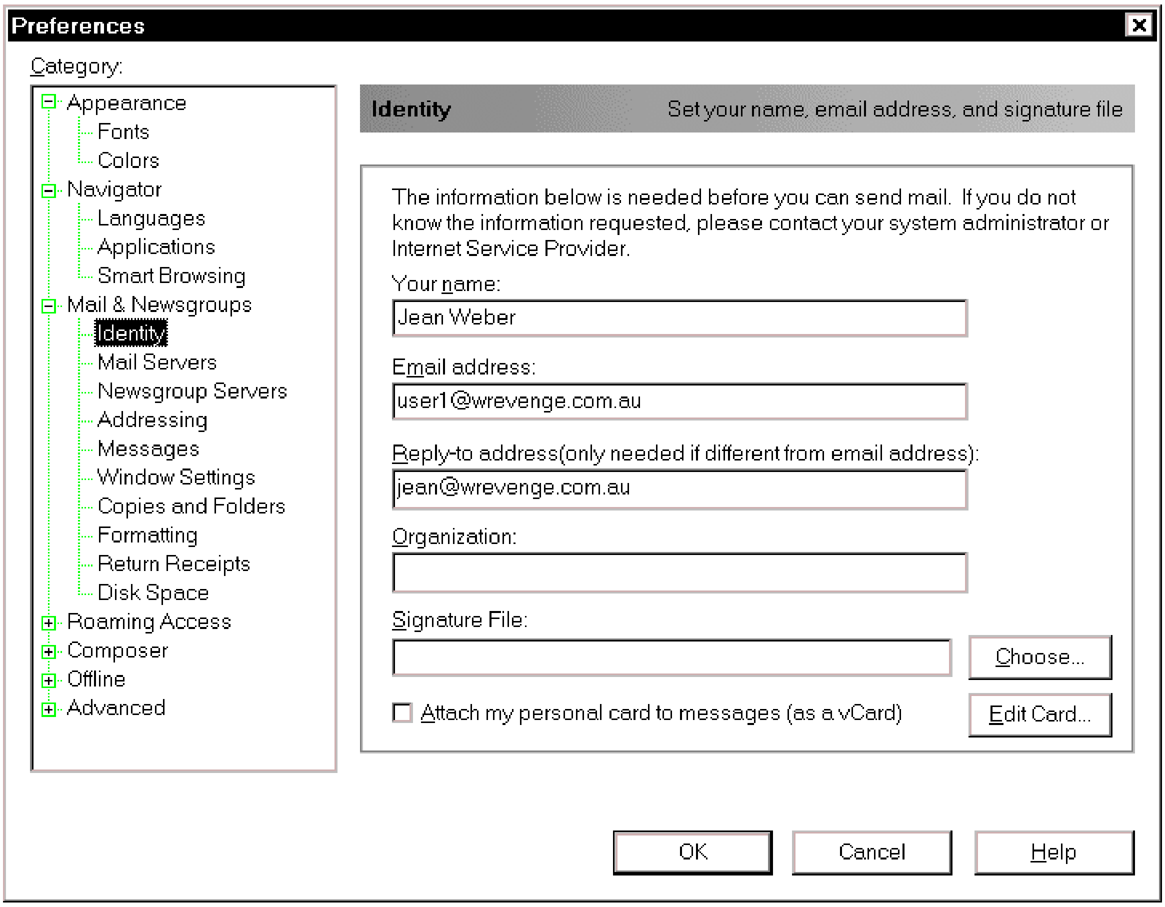


Figure 174. Entering your name and e-mail address on Netscape's Identity page

4. On the **Mail Servers** page (Figure 156):
   - Fill in your outgoing mail server information.
   - Click **Edit** to display the Mail Server Properties page (Figure 157), where you fill in your incoming mail server information. Click **OK** to return to the **Mail Servers** page.

Changing an existing account in Outlook Express 98

1. On the **Tools** menu, click **Accounts.**
2. On the **Mail** page of the Internet Accounts dialog (Figure 175), choose an existing account name and click the **Properties** button.
3. On the **Servers** tab of the Account Properties dialog (Figure 164), change the incoming mail server names and the logon account name to yours.

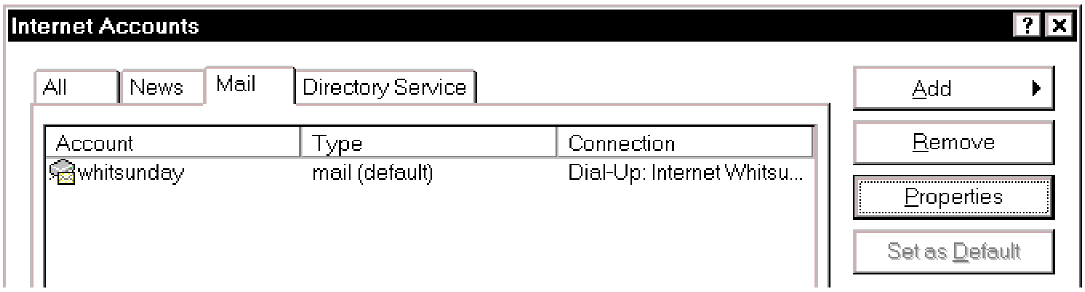


Figure 175. Choosing an existing account and displaying its properties

Changing an existing account in Eudora Light 3.0

1. On the **Tools** menu, click **Options**.
2. Click the **Personal Info** and **Hosts** icons in the left-hand pane (Figure 170 and Figure 171) and change the settings to the ones you recorded from your setup at home.

Appendix C
For more information

This appendix includes the resources (books and Web sites) listed at the end of chapters, plus other related references.

Books and articles (printed)

Adobe Development Team, *Adobe Acrobat 4.0 Classroom in a book*, Adobe Press, 1999, ISBN 1568304765.

Adobe Systems Inc., *Adobe Acrobat 3.0 classroom in a book*, Adobe Press, 1997, ISBN 1568303653

Adobe Systems Inc., *Adobe Framemaker 5.5 classroom in a book*, Adobe Press, 1997, ISBN 1568303998

Bonura, Larry S. *The art of indexing*, John Wiley & Sons, 1994, SIBN 0471014494

Elgin, Suzette Haden, *How to disagree without being disagreeable: Getting your point across with the gentle art of verbal self-defense*, 1997, John Wiley & Sons, ISBN 0471157058

Hackos, JoAnn, *Managing your documentation projects*, John Wiley & Sons, 1994, ISBN 0471590991

Leonhard, Woody, *The underground guide to telecommuting*, Addison-Wesley Publishing Company, 1995, ISBN 0201483432

Leonhard, Woody, *Woody Leonard teaches Office 97*, Que, 1998, ISBN 0789717050

Leonhard, Woody, Hedspeth, Lee and Lee, T.J., *Word 97 annoyances*, O'Reilly & Associates, Inc., 1997, ISBN 1565923081. A great collection of tips on how to get Word 97 working the way you want, as much as possible.

Littauer, Florence, *Personality plus: How to understand others by understanding yourself*, 1992, ISBN 080075445X

Maxwell, John C., *Developing the leader within you*, Thomas Nelson, 1993, ISBN 0840767447.

Miller, Casey and Swift, Kate, *The handbook of nonsexist writing for writers, editors and speakers*, 3rd edition, The Women's Press, 1995, ISBN 0704344424.

Neuburger, Thomas, *Mastering FrameMaker 5*, ISBN 0782117120. This book is out of print, but a revised edition (for FrameMaker 6) is expected to be published in 2000.

O'Keefe, Sarah, *FrameMaker for dummies*, IDG Books Worldwide, 1999, ISBN 0764506374

Ross-Larson, Bruce, *Edit yourself*, W.W. Norton & Co., 1996, ISBN 0393313263

Rude, Carolyn, *Technical editing*, 2nd edition, Allyn & Bacon, 1998, ISBN 020520032X

Tarutz, Judith, *Technical editing: The practical guide for editors and writers*, Addison-Wesley, 1992, ISBN 0201563568

University of Chicago Press, *The Chicago manual of style: the essential guide for writers, editors and publishers*. 14th edition. 1993. ISBN 0226103897

van Buren, Robert and Buehler, Mary Ann, *The levels of edit*, 2nd edition, Jet Propulsion Laboratory, Pasedena, CA, January 1980, JPL Publication 80-1, 26 pp.

Electronic (Web sites, e-mailed newsletters)

Web sites and their addresses change frequently, often without warning or redirection to their new location. This list was up to date in August 1999.

Adobe user forums:
http://www.adobe.com/supportservice/custsupport/forums.html

Alki Software Corporation, http://www.alki.com/, has tools for Microsoft Office, including proofing tools (spelling dictionaries, hyphenation files, and thesauri) for over two dozen languages. (You can go directly to those tools at http://www.proofing.com/.)

Blueworld, http://www.blueworld.com/, has discussion lists. For information about the Adobe Acrobat list, go to http://www.blueworld.com/blueworld/acrobat.html.

Clarke, Cathy and Brown, Ron, "Word can do it," is a discussion about referenced documents, sequence numbers, field codes, and how to make them all work. Institute of Scientific and Technical Communicators (ISTC), http://www.istc.org.uk/wordcan.htm

The Electric Editors site has lots of useful resources, on a variety of relevant topics, and three mailing lists. http://www.ikingston.demon.co.uk/ee/

FOLDOC (Free On Line Dictionary of Computing) is a good site for looking up computer terms. http://www.wombat.doc.ic.ac.uk/foldoc/index.html

Framers discussion lists: send e-mail with the message "Subscribe Framers" to <majordomo@FrameUsers.com> or <majordomo@omsys.com> (two different lists).

Knopf, David, "Autonumbering with RoboHELP on Word 97," http://www.knopf.com/tips/01-autonumbering/autonumber.htm

Microsoft Knowledge Base, "WD97: Picture displayed as red 'X' in document." http://support.microsoft.com/support/kb/articles/q162/3/49.asp

Microsoft's Office Update site, for free downloads, including patches, file viewers and converters. http://officeupdate.microsoft.com/word/

Merriam Webster's online WWWebster Dictionary. http://www.m-w.com/cgi-bin/dictionary

Onelook is a search engine that connects to various other dictionary sites, providing definitions from a variety of fields, such as business, computers, and medical. http://www.onelook.com/

PDFzone (© Knowledge in Motion) has discussion lists, resources, and links to other information about creating and using Adobe's PDF (Portable Document Format) files. http://www.pdfzone.com/resources/tips/

ResearchBuzz (http://www.researchbuzz.com/) is a site full of up-to-date information and tips on how to use the Internet for research. It is kept up to date by Tara Calishain, the author of *The Official Netscape Guide to Internet Research* (published in 1998 and now a bit out of date).

Troffer, Alysson, "Editing online documents, strategies and tips," in *Contentious*. See http://www.contentious.com/articles/V2/2-4/feature2-4a.html and linked pages.

Weber, Jean Hollis, *The Technical Editors' Eyrie*. Contains copies of my publications and other resources. Free newsletter available. http://www.wrevenge.com.au/

Whatis is a good place to look up computer terms. http://whatis.com

Woody's Office Watch is a free weekly e-mailed newsletter from Woody Leonhard. It covers the entire Microsoft Office 97 suite. To subscribe, send a message to <wow@wopr.com>.

Word-PC discussion list. Send e-mail with the message "Subscribe" to <listserv@listserv.liv.ac.uk>.

WordTips is a free weekly e-mailed newsletter of tips and tricks for using Word, from Allen L. Wyatt of Discovery Computing Inc. To subscribe, send a blank e-mail to <join-wordtips@lists.lyris.net>. Wyatt's website (http://www.VitalNews.com/) includes other relevant resources.

Word Pro user discussion community, http://www.support.lotus.com/freewpro.nsf?opendatabase

Programs

The programs listed here are available from a wide range of software resellers, as well as directly from the companies that produce them. Mention of these programs does not constitute endorsement of any of them. Other programs may be available that do much the same things.

DiskClone (Symantec)
  http://www.symantec.com/sabu/qdeck/diskclone/mainreg.html

Norton Ghost Personal Edition (Symantec)
  http://www.symantec.com/press/1999/n990802b.html

DriveCopy (Powerquest)
  http://www.powerquest.com/drivecopy/index.html
    (English language version for North Americans)

  http://www.powerquest.com/en/drivecopy/index.html
    (English language version for non-North Americans)
  Other language versions available.

DriveImage (Powerquest)
  http://www.powerquest.com/driveimage/didetail.html
    (English language version for North Americans)
  http://www.powerquest.com/en/driveimage/didetail.html
    (English language version for non-North Americans)
  Other language versions available.

Compression programs

WinZip http://www.winzip.com/

Aladdin Expander (for Windows) and StuffIt Expander (for Macintosh),
  http://www.alladdinsys.com/expander/

Anti-virus programs (not a complete list)

Norton Anti-Virus (owned by Symantec):
  http://www.norton.com/ or (better)
  http://www.symantec.com/nav/index_product.html

Dr Solomon’s Anti-Virus (recently acquired by Symantec)
http://www.drsolomon.com/products/antivirus/index.cfm

McAffee Virus Scan (search through their store to find products for operating systems in addition to Windows 95/98):
http://www.mcafee.com/

PC-cillin 6 (Windows 95/98)
http://www.antivirus.com/products/pc_cillin.htm

Appendix D Glossary

This glossary includes publishing and computing terms used in this book. The definitions are adapted from several sources, including the Microsoft Press Computer Dictionary, Third Edition, 1998; FOLDOC, the Free On-Line Dictionary of Computing (http://www.wombat.doc.ic.ac.uk/foldoc/index.html), and various other dictionaries reached from the search engine Onelook (http://www.onelook.com/).

archive. *n.* **1.** A tape or disk containing files copied from another storage device and used as backup storage. **2.** A compressed file. *vb.* **1.** To move or copy files onto a tape or disk for long-term storage. **2.** To compress a file.

AutoText. *n.* In Microsoft Word, a place to store frequently-used text and graphics, such as product names, boilerplate text, specialist terms, or a company logo; writers can retrieve the information with a few keystrokes. If AutoText is inserted into a document as a field, the writer can change the AutoText entry to update all places in a document where the entry appears. Similar to Adobe FrameMaker's user-defined variables.

backup. *n.* A duplicate copy of a program, a disk, or data, made either for archiving purposes or for safeguarding valuable files from loss if the active copy is damaged or destroyed. *vb.* To make a duplicate copy (the verb is two words, *back up*).

boilerplate. *n.* Frequently used text (such as legal disclaimers and other standard paragraphs) that is copied into many documents.

browser (also called Web browser). *n.* An application that enables a user to view HTML documents on the World Wide Web, on another network, or on the user's computer; follow the hyperlinks among them; and transfer files. In addition, most current browsers can display graphics and video files, play audio files, and permit users to send and receive e-mail and to read and respond to newsgroups.

bullet. *n.* A heavy dot or other symbol used to mark items in a list. A bulleted list (also called an unordered list) is used when the list items are not in a particular order.

CBT. Computer-based training. A type of education in which the student learns by using training programs on a computer. CBT is especially effective for training people to use computer applications because the training program can be integrated with the application so that students can practice using the application as they learn.

click. *vb.* To press and release a mouse button once without moving the mouse. Clicking is usually performed to select or deselect an item or to activate a program or program feature. *See also* right-click, double-click, drag.

command-line interface. *n.* A form of human–computer interaction, based on text-only input and output, in which the user types commands using a special command language. *Compare* graphical user interface (GUI).

compress. *vb.* To modify a file (using a special program) to save storage space or transmission time; used, for example, in data communications, facsimile transmission, and CD-ROM publishing.

crop. *vb.* To cut off part of an image, such as unneeded sections of a graphic or extra white space around the borders; used to refine or clean up a graphic for placement in a document.

cursor. *n.* An on-screen indicator, such as a blinking underline or rectangle, that marks the place at which a keystroke will appear when typed. In graphical user interfaces, the cursor is often a vertical bar, known as the insertion point.

deselect. *vb.* To reverse the action of selecting an option, a range of text, a collection of graphical objects, and so on. *Compare* select.

dialog (also called dialog box). *n.* In a graphical user interface, a special window displayed by the system or application to request a response from the user.

directory. *n.* A catalog for file names and other directories stored on a disk, organizing and grouping the files. In the Macintosh and Windows 95 operating systems, directories are called *folders*.

document. *n.* Any self-contained piece of work created with an application program and, if saved on disk, given a unique filename by which it can be retrieved. Documents include word-processor files, spreadsheets, and other files.

domain name. *n.* In the Internet and other networks, a subdivision in a network address that identifies the owner of that address (for example, .microsoft, .ibm, or .wrevenge), the type of entity owning the address (for example, .com for commercial users or .edu for educational institutions) and in some cases the geographical location of the address (for example, .au for Australia, .ca for Canada, .uk for the United Kingdom).

double-click. *vb.* To press and release a mouse button twice quickly, without moving the mouse; a means of rapidly selecting and activating a program or program feature. *Compare* click, drag, right-click.

download. *vb.* **1.** In communications, to transfer a copy of a file from a remote computer to the requesting computer by means of a modem or network. **2.** To send a block of data, such as a PostScript file, to a dependent device, such as a PostScript printer. *Compare* upload.

drag (also called drag-and-drop). *vb.* In graphical user interfaces, to move an image, window, or other object from one place on the screen to another by positioning the mouse pointer over the object, then pressing and holding the mouse button while moving the mouse.

e-commerce (electronic commerce). *n.* Commercial activity (communications and transactions) that takes place by means of computers connected to the Internet; includes buying and selling of goods and services, the transfer of funds, electronic mail, file transfer, fax, and video conferencing.

e-mail (electronic mail) *n.* The exchange of text messages and computer files over a communications network, such as a local area network or the Internet, usually between computers. *vb.* To send an e-mail message.

electronic publishing. *n.* Distributing information via electronic media, such as communications networks or CD-ROM, or by placing the material on a Web site.

EPS (Encapsulated PostScript). *n.* A PostScript file format used for incorporating images into the PostScript output of an application such as a desktop publishing program. Many high-quality clip-art packages consist of such images. *See also* PostScript.

EPSS (Electronic Performance Support System). *n.* Software that provides job-related help to people while they're doing the job; for example, how to process a customer's order. EPSS is different from the online help for an application program, which tells people how to use the program itself, although EPSS may be integrated with an online help system. Some of the "wizards" in modern software are a form of EPSS, but many EPSS systems are specific to an organization or an industry.

ergonomics. *n.* The study of the design and arrangement of equipment so that people will interact with the equipment in a healthy, comfortable, and efficient manner. As related to computer equipment, ergonomics is concerned with such factors as the physical design of the keyboard, screens, and related hardware, and the manner in which people interact with these hardware devices.

field. *n.* A space in an on-screen form or dialog where the user can enter a specific item of information.

file. *n.* A complete, named collection of information, such as a program, a set of data used by a program, or a user-created document. A file is the basic unit of storage that enables a computer to distinguish one set of information from another.

folder. *n.* In graphical user interfaces such as the Macintosh and Microsoft Windows, a container for programs and files; a means of organizing programs and documents on a disk. Called a directory in other systems, such as MS-DOS and UNIX.

font. *n.* A set of characters of the same typeface (such as Garamond), style (such as italic), and weight (such as bold). A font consists of all the characters available in a particular style and weight for a particular design; a typeface consists of the design itself. Fonts are used by computers for on-screen displays and by printers for hard-copy output.

footer. *n.* One or more identifying lines printed at the bottom of a page. A footer may contain a page number, a date, the author's name, and the document title. *Also called* running foot. *Compare* header.

FTP (File Transfer Protocol). *n.* Used for copying files to and from remote computer systems on a network, such as the Internet. Users can also work with files on the remote system, for example listing files and directories. *vb.* To download files from or upload files to remote computer systems using FTP.

GIF (Graphics Interchange Format). *n.* A graphics file format used for transmitting images on the Internet. Compare JPEG, PNG, TIFF.

GUI (Graphical User Interface). *n.* A type of environment that represents programs, files, and options by means of icons, menus, and dialog boxes on the screen. The user can select and activate these options by pointing and clicking with a mouse or, often, with the keyboard.

header. *n.* In word processing or printing, one or more identifying lines printed at the top of a page. *Also called* running head. *Compare* footer.

heading. *n.* A title or caption introducing a chapter, section, or topic in a document.

highlight. *vb.* To alter the appearance of displayed characters as a means of calling attention to them, as by displaying them in reverse video (light on dark rather than dark on light, and vice versa), with greater intensity, or in a different color. Used to indicate an item, such as an option on a menu or text in a word processor, that is to be acted on in some way.

home page. *n.* An entry page for a set of Web pages and other files on a Web site.

HTML (Hypertext Markup Language). *n.* The markup language used for documents on the World Wide Web. HTML uses tags to mark elements, such as text and graphics, in a document to indicate how Web browsers should display these elements to the user and should respond to user actions such as activation of a link by means of a key press or mouse click.

hyperlink. *n.* A connection between an element in a hypertext document, such as a word, phrase, symbol, or image, and a different element in the document, another hypertext document, a file, or a script. The user activates the link by clicking on the linked element. *Also called* hot link, hypertext link.

hypermedia. *n.* The integration of any combination of text, graphics, sound, and video into a system of information storage and retrieval in which users jump from subject to related subject in searching for information. If the information is primarily in text form, it is regarded as hypertext; if video, music, animation, or other elements are included, the information is regarded as hypermedia.

hypertext. *n.* Text linked together in a complex, non-sequential web of associations in which the user can move through related topics.

insertion point. *n.* In graphical user interfaces, a blinking vertical bar that marks the location at which inserted text will appear. *See also* cursor.

Internet. *n.* The worldwide collection of networks and gateways that communicate with one another; based on high-speed data communication lines that route data and messages between computers.

intranet. *n.* A network designed for information processing within a company or organization; used for document distribution, software distribution, access to databases, and training. An intranet usually employs applications associated with the Internet, such as Web pages, Web browsers, FTP sites, e-mail, newsgroups, and mailing lists, accessible only to those within the organization.

ISP (Internet Service Provider). *n.* A business that supplies Internet connectivity services to individuals, businesses, and other organizations. *Also called* access provider, service provider.

JPEG (Joint Photographic Experts Group). *n.* A standard for storing images in compressed form; often used on Web pages. A graphic stored as a file in the JPEG format has the file ending .JPG. *See also* GIF, PNG, TIFF.

LAN (local area network). *n.* A group of computers and other devices dispersed over a relatively limited area and connected by a communications link that enables any device to interact with any other on the network. LANs commonly connect computers and shared resources such as laser printers.

landscape orientation. *n.* A horizontal print orientation in which text or images are printed so that the width of the image on the page is greater than the height. *Compare* portrait orientation.

markup language. *n.* Codes inserted into an electronic document to indicate how it is to be printed or displayed. SGML, HTML and XML are examples of markup languages.

menu. *n.* A list of options from which a user can make a selection in order to perform a desired action, such as choosing a command or applying a particular format to part of a document.

menu bar. *n.* A rectangular bar displayed in an application program's on-screen window, often at the top, from which menus can be selected by the user. Names of available menus are displayed in the menu bar; choosing one with the keyboard or with a mouse causes the list of options in that menu to be displayed.

modem (**mo**dulator/**dem**odulator). *n.* A communications device that enables a computer to transmit information over a standard telephone line.

monitor. *n.* A video display device on which images generated by the computer's video adapter are displayed; usually refers to a video display and its housing which are separate from the main computer. On a laptop computer, this device is usually known as the *screen* or the *display*.

multimedia. *n.* The combination of sound, graphics, animation, and video; a subset of hypermedia, which combines these elements with hypertext. *See also* hypermedia, hypertext.

palette. *n.* **1.** In graphics programs, a collection of drawing tools, such as patterns, colors, brush shapes, and different line widths, from which the user can choose. **2.** A subset of all the possible colors that establishes which colors can be displayed on the screen at a particular time.

PDF (Portable Document Format). *n.* The file format for Adobe Acrobat. PDF represents documents in a manner that is independent of the original application software, hardware, and operating system used to create those documents. A PDF file can describe documents containing any combination of text, graphics, and images in a device-independent and resolution-independent format.

PNG (Portable Network Graphics). *n.* A file format for bitmapped graphic images, designed to be a replacement for the GIF format. *See also* GIF, JPEG, TIFF.

point. *vb.* In graphical user interfaces, to place the mouse pointer over an on-screen item.

pointer (also called mouse pointer). *n.* In graphical user interfaces, an on-screen element whose location changes as the user moves the mouse.

POP (Post Office Protocol). *n.* A protocol for servers on the Internet that receive, store, and transmit e-mail and for clients on computers that connect to the servers to download and upload e-mail. POP3 is the latest version of the POP standard.

portrait orientation. *n.* A vertical print orientation in which a document is printed across the narrower dimension of a rectangular sheet of paper. This is the print mode typical of most letters, reports, and other such documents. *Compare* landscape orientation.

PostScript. *n.* A page-description language from Adobe Systems that offers flexible font capability and high-quality graphics.

printer driver. *n.* A software program designed to enable other programs to work with a particular printer.

protocol. *n.* Any set of rules describing how to transmit data, especially across a network. Every type of computer data transfer and network communication, internal or external, is done according to one or more protocols.

right-click. *vb.* To make a selection using the button on the right side of a mouse or other pointing device. Doing so in a Windows 95/98 environment typically displays a pop-up menu with options applicable to the object over which the cursor is positioned. *See also* click, double-click, drag.

screen. *n.* The display area on a computer monitor or laptop computer.

screentips. *n.* A Microsoft term for the words that pop up when you pause the mouse pointer over an icon or other item for a short time. *See also* tooltips.

select. *vb.* To specify a block of data or text on screen by highlighting it or otherwise marking it, with the intent of performing some operation on it.

server. *n.* **1.** On a local area network (LAN), a computer running administrative software that controls access to the network and its resources, such as printers and disk drives, and provides resources to computers functioning as workstations on the network. **2.** On the Internet or other network, a computer or program that responds to commands from another computer, called a client. For example, a file server may contain an archive of data or program files; when a client computer submits a request for a file, the server transfers a copy of the file to the client computer.

SGML (Standard Generalized Markup Language). *n.* An information management standard adopted by the International Organization for Standardization (ISO) in 1986 as a means of providing platform- and application-independent documents that retain formatting, indexing, and linked information. SGML provides a mechanism for users to define the structure of their documents and the tags they will use to denote the structure in individual documents.

SmartMaster. *n.* In Lotus SmartSuite, a template for a Word Pro or other document.

SMTP (Simple Mail Transfer Protocol). *n.* A protocol for sending messages from one computer to another on a network. This protocol is used on the Internet to route e-mail. *Compare* POP (Post Office Protocol).

tabs. *n.* Indicators, much like the labels on file folders in a filing cabinet, that show in dialogs that have several pages.

telecommute. *vb.* To work in one location (often at home) and communicate with a main office at a different location through a personal computer equipped with a modem and communications software.

template. *n.* In word processing and desktop publishing programs, a predesigned document that contains formatting and, in many cases, generic text.

TIFF (Tagged Image File Format). *n.* A standard file format commonly used for scanning, storage, and interchange of graphic images. *Compare* GIF, JPEG, PNG.

toolbar. *n.* In a graphical user interface, a row, column, or block of on-screen buttons or icons. For example, word processors often feature toolbars with buttons for changing text to italic, boldface, and other styles. *Compare* menu bar, palette (definition 1).

tooltips. *n.* Microsoft term for a specific form of screentip that shows when you oause the mouse pointer over an icon on the toolbar. *See also* screentips.

typeface. *n.* A specific, named design of a set of printed characters, such as Helvetica Bold Oblique, that has a specified obliqueness (degree of slant) and stroke weight (thickness of line). A typeface is not the same as a *font,* which is a specific size of a specific typeface, such as 12-point Helvetica Bold Oblique. Nor is a typeface the same as a *typeface family,* which is a group of related typefaces, such as the Helvetica family including Helvetica, Helvetica Bold, Helvetica Oblique, and Helvetica Bold Oblique. *See also* font.

upload. *vb.* To transfer a copy of a file from a local computer to a remote computer. *Compare* download.

URL (Uniform Resource Locator). An address for a resource on the Internet. Used by Web browsers to locate Internet resources.

variable. *n.* In Adobe FrameMaker, a field that displays system information which may change (for example, today's date), or which may be defined by the user, redefined when information changes, and then displays the new information everywhere the variable occurs (for example, the name of a product). Similar to Microsoft Word's AutoText.

virus. *n.* An intrusive program that inserts copies of itself into ("infects") computer files. The copies are usually executed when the file is loaded into memory, allowing them to infect still other files, and so on. Viruses often have damaging side effects—sometimes intentionally, sometimes not.

Web browser. *n. See* browser.

Web page. *n.* A document on the World Wide Web. A Web page consists of an HTML file, with associated files for graphics and scripts, in a particular directory on a particular machine (and thus identifiable by a URL).

Web server (also called HTTP server). *n.* **1.** Software that serves up HTML documents and any associated files and scripts when requested by a Web browser. **2.** Any machine on which an HTTP server program is running.

Web site. *n.* A group of related HTML documents and associated files, scripts, and databases that is available on the World Wide Web. *See also* home page, HTML, Web server, browser.

wildcard. *n.* A keyboard character that can be used to represent one or many characters.

window. *n.* In applications and graphical interfaces, a portion of the screen that can contain its own document or message.

World Wide Web. *n.* The total set of interlinked hypertext documents residing on Web servers all around the world.

WYSIWYG (What You See Is What You Get). *adj.* A document view in which a user sees the document as it will appear in the final product, and can directly edit the text, graphics, or other elements within a view.

XML (eXtensible Markup Language). *n.* A markup language derived from SGML.

zip. *vb.* To create a compressed archive from one or more files using an archiving program. *n.* A compressed file created in this way.

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