

## Up, Onward, and Conquer



*Never give up before reaching the summit.* [John Muir, American climber, 1873]

*Great things are done when men and mountains meet;  
This is not done by jostling in the street.*

[Gnomonic Verses, William Blake, 1757–1827]

*My word!* [expression of surprise, also title of popular BBC radio show]

### Living with words

Schools, colleges and universities produce many words. In our present state of technology, most of this is produced using a computer rather than by the typewriter or handwritten manuscript of the past. As well, the application which is overwhelmingly dominant in education is *Microsoft™ Word™*, in one of its versions. In the lead article of this issue, I tackle getting over the learning plateau and open up possibilities of using the facilities in Word to improve your effectiveness in teaching or producing assignments in the digital world.

My advice is written for the current version of *Word™* in *Office 2000™*. On a previous version or a Mac, the interface may be slightly different.

### Big Documents

When you learn word-processing, you quickly become familiar with the features necessary to produce letters and short documents, usually in the range of 1–5 pages, but perhaps up to 10 pages. If you couldn't, you'd be in trouble and would have to ask for help.

Then, suddenly, you have to produce a 30–100 page document, perhaps a position paper, a thesis, or a book. Are you in trouble? You bet! The techniques of producing large documents are as different as designing the Sydney Harbour Bridge is from putting a log over a stream. So let us explore some of the issues: collaboration, consistency, comments, organization, pictures, revisions, and styles.

### Highlighting

In the real world you can **highlight** words and phrases with fluorescent markers as you read documents to mark a spelling error or something you need to remember, like a marker for text that someone else is to provide.

In the digital world you have the same facility, except the highlighting pen never runs dry. The icon will be



in the **Formatting** toolbar, which I assume you have open alongside your window.

Select some text in your document, click the icon and you have a printable highlight.

There is choice of colors through a pull-down list next to the icon, though probably only the lightest five **xxxxx** are useful. Highlighting is very simple to use, and the highlighted sections are difficult to miss when you are proofreading, especially if you use a color printer or view on a color screen.

### Comments

As you develop your large document, almost certainly you won't write it from start to middle to finish. If you're writing it yourself, you will sketch out a framework, and then develop the parts you feel confident about. As you write or as you incorporate work from others, you will come across inconsistencies, things that need checking, or spaces that need to be filled out. You need something more sophisticated than plain highlighting; you need *comments*.

Comments allow you to attach pop-up text to a word or words in your document. The paper world equivalent is a marginal comment, or one of those *PostIt™* sticky notes that *3M* pioneered.

Now you must learn to bring up extra toolbars. Choose the **View** menu, choose **Toolbars**, and then the **Reviewing** toolbar. The toolbars at the top of your screen will expand to include an extra row. For this section, we are interested in the first group of five icons: the comment facilities.



To insert a comment, select some text in the main document, then click on the leftmost icon in this **Reviewing** toolbar. Immediately a pane will open at the bottom of your document, into which you can type a text comment, and then click **Close**.

Your document now has a pale yellow highlighted selection[ahjs1] when displayed on the screen. When you hover the mouse cursor over it, the comment pops up to remind you there is something to do later. However, the highlight and the comment won't print unless you specifically set that option; they are intended for display and reminder.

Whack in a comment whenever you can't finish something off. To change a comment, position the cursor in it (or use the **Previous/Next** buttons on the toolbar) and click the **Edit Comment** button to bring up the pane again. Clicking the **Delete Comment** button instead removes the comment and the text goes back to normal.

## Collaborative Documents

If you are collaborating with other people in preparing a document, you need to know about Change Tracking. Put the **Reviewing** toolbar up, if you haven't already done so to look at comments. We are now going to look at the next set of five icons:



Turn on *Track Changes* by clicking the first icon (TRK will appear in the status bar). From now on every change you make to the document is marked in three ways:

- A deletion is shown in red, crossed through like ~~this~~.
- An insertion is shown in underlined blue.
- Pasting or typing over ~~Changing~~ a selection causes both the insertion and the deletion to be displayed.
- All changes, including format changes, are indicated by vertical bars in the margin. See *this* margin for an example (the word 'this' was italicized).

You can change all these defaults if you want. Turn off *Track Changes* by re-clicking the first icon.

Now, if someone sends you a document to review, you can turn this feature on and everything you do to the document is recorded for them to see when they get it back. You can also add comments relating to complex matters that you don't want to redraft yourself.

If you send a document to someone else to review, you can ask them to do this for you. You can highlight sections you really want them to look at.

It is all very well to see the changes, but how do you incorporate them into your document? One way is to use the 2<sup>nd</sup> and 3<sup>rd</sup> icons on the toolbar to reach the previous/next change, and the 4<sup>th</sup> and 5<sup>th</sup> icons to accept or reject the change. You can also choose **Tools/Track Changes/Accept or Reject Changes**, and use the options in the dialog, including one to accept all changes sight unseen.

Amongst the other things you can do is to protect the document so that reviewers can *only* add comments and tracked changes; also you can

compare an edited document with the original and produce a change-tracked one, and you can merge documents from multiple reviewers. The key phrases to search for in **Help** are 'Reviewing' and 'Track Changes'.

The key to documents being reviewed by several people simultaneously is to make sure everyone's identity is recorded on their computer, especially initials. Select **Tools/Preferences**, then click on **Options** (User Information in a Mac). Fill in the data.

## Interoperability

There are two main issues in making your long document readable on other computers. One of them is the choice of fonts, and the other is the portability of file formats.

- Only use fonts that are likely to be available on everyone's machine. Otherwise your carefully crafted image may look like a dog's breakfast when it arrives on the recipient's screen or printer. Reliable sans-serif choices: *Arial*, *Verdana*. Good serif choices: *Times New Roman*, *Georgia*. On a Mac use *Helvetica* and *Times* that become *Arial* and *Times New Roman* respectively on a PC. Use *Courier* if you really need a monofont (all characters equally spaced, for computer listings or the typewriter look). You can usually rely on *Symbol* too, with Greek letters and mathematics symbols.
- Alternatively check that your recipient has the required fonts first. This does not work for widespread dissemination.
- Another option is to incorporate your unusual fonts into the document, so they go with it to the recipients. You have two possibilities:
  - Save the fonts with the file, making it larger of course. See **Tools/Options/Save** and the **Embed TrueType fonts** check box.
  - Convert the file to PDF (Portable Document Format). You will need to have Adobe Acrobat installed, and you simply 'print' to a *PDFWriter* virtual printer, which creates a file with a '.pdf' suffix.



In either case check the result before you send the document, using a basic computer without your special fonts.

Whether you have to worry about file formats depends on your analysis of the installations of the intended recipients. If you know this includes previous versions of *Word*<sup>TM</sup> or if you simply don't know, consider saving your document in a lowest common denominator file version (in other words in an older format than your up-to-date Office 2000 format) or in the even safer RTF (Rich Text Format). The options are shown at the bottom of the **Save As**

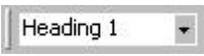
dialog box. Be aware you may lose some formatting (and things like comments) and email the copy to a friend to see what happens before you upset a lot of people.

Again, PDF is an alternative that can be read on any computer using the free Acrobat Reader.

If the document will only be used in printed versions made by your own computer, none of this applies.

## Styles

This may be the most important thing you can learn to use. Look, if your long document is formatted using consistent styles, you are in control of how it looks. If not you aren't.

Styles are shown on the left of the Formatting toolbar. They look like *Normal*, *Heading 1* or *Body Text* in the toolbar. They provide you with a consistent set of  formats for the document, while retaining the option of local variation.

Every document you create in Word has styles, even if you don't use them. When you open a default document, you import the styles from the *Normal* template.

### Using styles in new text

So how do you use them? If you are starting a document from scratch, select a style (try *Heading 1*) and type a heading for your document. Probably after you reach the end of the line you will notice that the style automatically changes to *Body Text*, or *Normal*. If you keep on typing, your paragraphs keep on adopting the 'next style' in the definition of the style in the last paragraph.

To change the style of a paragraph, select it and pull down the style list to a new one. Try *List Bullet* on a couple of paragraphs. Try *Heading 2* and *Heading 3* on a sub-heading. Change it back to what it was before.

### Stylizing an existing document

If I have an existing large document to put styles in, I usually make a printed copy first. Then I select the whole document to be *Body Text* (not *Normal* which is just the default), and then methodically work through the file several times giving the headings the appropriate style, reformatting the bulleted and numbered lists, and adding other incidental formatting.

### Editing styles

If you don't like the styles in the *Normal* template, you can choose one of the other templates that Microsoft provides. Or you can edit the styles yourself, even making up new styles or a new template to suit your own preferences.

The editing facility is to be found under the **Format/Style** menu. Many styles are based on a basic style, such as *Normal* or *Body Text*. Changing one of these (for example) will make changes in

many others. However, if you want to change the font for a document, this is where to do it.

Here are some examples of what you can do with styles. You can edit heading styles to leave white space above and below the heading, and to center or left justify them. *Digital Trekking* uses a *Body Text* that is an unindented first paragraph, and its 'next style' is *Body Text 2*: exactly the same but with the first line indented. *Body Text 2* is its own 'next style'.

## Table of Contents

If you've used styles consistently, it is so easy to generate a *Contents Page* you'll wonder why you didn't know about it before.

Position your cursor where you want the contents to be, select **Insert/Index and Tables...** then the **Table of Contents** tab. You will see on the right the levels of 'Heading' styles that will be put in the contents page and on the left how they will look using 'TOC' styles. You can change the number of levels, the style of the tab leader line, etc. Try the default settings on a small document that at least has heading styles, then explore the options.

You will also find that the contents entries are hyperlinks and if clicked will take you to the relevant chapter or section heading.

You *must* establish a routine of regenerating the contents section; it is not automatically updated when you edit the document. To regenerate, select the whole of the old contents section and insert a new one over it as explained earlier.

## Indexes

With the hints about Contents, you should be able to create an index by yourself. See 'Create an Index' in **Help**. *Word*<sup>TM</sup> will need your help to choose what words you want to index.

## Flowing around pictures

*Digital Trekking* often uses pictures to illustrate the text. To save space, the pictures are small and the text flows around them. How can you do this?

Cut and paste a picture or clip art into some text preferably at the start of a paragraph. Context Click (middle finger) on the picture, and you will bring up a menu. Select **Format Picture** then the **Layout** tab. You will see some options, but ignore them and head for the **Advanced** button and the **Text Wrapping** tab. Now choose your style of text wrapping (I suggest **Square**) and the **Largest Only** radio button for a start. Click enough **OKs** to get out.

Now you've done it once you can explore the effects of the other options, or look at **Help**. To give you a challenge, a picture on the next page has 'tight wrapping'.

## Plateau learning

Why was there a mountain illustrating this issue? One of the important messages I want to develop is that most of us show symptoms of plateau learning. When faced with some new technology such as *Word*<sup>TM</sup>, we learn enough to enable us to do the tasks we want at the time, and stop when we think we have got enough. For example, new car drivers learn enough to drive safely in normal conditions, but may not bother with skid control, defensive driving, or how to change a spark plug.

We know there is more to be learnt, but we don't invest the time to learn it. Hence the name *plateau learning* or *plateau knowledge*: we reach a level plain of competence, and have no inclination to explore the mountains we plainly see all around because they look daunting or we don't feel the need. Yet there may be even more rewarding vistas up there.

With this issue, I have tried to show you some of the more interesting paths up from a common *Word*<sup>TM</sup> plateau. I hope you explore at least a few, because you will then be on a path to reach a higher level of competence. You may come back later and explore other of the paths in the issue, but realize also that there are many, many opportunities to explore, and not just in *Word*<sup>TM</sup>. Set aside a small amount of time on a regular basis that suits you (monthly? quarterly?) to explore the software you use. Don't wait for a need to arise, because deadlines will probably not allow you to do the exploration then and you will have to make do with your existing skill set. Log the time down to professional development.

*Importantly, remember the concept of plateau learning; it is a vital part of being self-aware in the digital world.*

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## Rather talk than type?

Here is an idea that one senior executive uses to save himself typing. He starts with a *Word* document that simply consists of the name of one of his immediate sub-managers and the date. He selects a point after the name, and chooses **Insert/Object/Wave Sound**. A small loudspeaker icon appears in the document together with the *Sound Recorder* window. He clicks *New*, the Record button, and talks briefly into a microphone (perhaps on his monitor) before stopping the recorder. The file is saved, and he sends it by email as an attachment, adding anything else desired.



The recipient listens to the message by double-clicking the icon. The recipient can respond in the same way, of course. There are several ways of

directing a spoken comment to more than one person. This is voicemail on the cheap, with a file copy kept. Tips: set the lowest quality (telephone) to keep the file size down, rarely use over a modem, and be brief.

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## e-Letterhead

Have you ever wanted your emails to look more professional, and reflect the quality of your university, college or school? Although some emails are virtually conversation, others are formal communications.

Here are some tips. First, create a professional-looking *signature file* or get your IT support person to create a template for your whole department. ***The signature file is the electronic equivalent of a letterhead***, and can be uniform in format across a department or an institution.

It should contain your name, the name of the institution, your telephone number, fax number, email address, postal address, and (if applicable) a website URL. There is nothing more irritating than receiving an email and wanting to call the person back on the phone, but having no number ready to hand. The signature file should *not* contain IT in-jokes such as 'smileys', or quotes which will almost certainly irritate some recipients. This will work whatever email software you are using.

Secondly, if you are using simple plain text emails, you might consider switching to HTML format. Get someone to create a header bar (picture) that has a small file size but contains your institutional logo and its name (perhaps central address information too). Insert this into the usual template so that it appears at the top of each email message, just as on pre-printed letterhead paper.

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## Readers' comments

- 'If you are going to keep this quality up, six issues a year will keep you really busy.'
- 'Everyone in our department now uses Google.com in their searching, thanks to your article.'
- 'I've bought books from Amazon.com for a long time, but never realized before that it was a resource to be mined.'
- 'I read the last issue from front to back, and I'll have to get back to try out the ideas as soon as I have time.'
- 'I could not possibly produce a publication like this for what you charge.'

Suggestions for topics or comments are welcome, addressed to me at [ahjs@ozemail.com.au](mailto:ahjs@ozemail.com.au) or [editor@digitaltrekking.com](mailto:editor@digitaltrekking.com).