

# Advanced Microsoft® Office Documents 2007 Edition Inside Out

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Press

## CHAPTER 4

# Building Easy-to-Manage, Robust Documents

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**Y**ou want documents that remain easy to use and easy to share regardless of content or editing needs. Should you consider playing the lottery instead, for better odds?

Actually, you might be surprised at just how much document-related stress you can easily avoid, and how solid your documents can be. There is a reason for everything that happens in a Microsoft Word document. You might not always like the reason, but when you take the time to understand it, the pieces can come together nicely and much more simply than you might expect.

The difference between good, healthy documents that can stand up to editing and frustrating documents that continually let you down is the difference between understanding *why* versus just knowing *how*.

### What You Can Really Do with Word

The document shown here contains 12 graphics and 14 tables. The file size is just 430KB. What's more, it took just two hours to create everything you see on these pages. Sound too good to be true? Check it out for yourself. You can edit this document, share it, do as you like with it. This document will not let you down.

Northwind Traders

**Pitch Book Sample**

Prepared for: Type Client Name Here

Date: Select Date

Presented by: Your Name

Your Title

Northwind Traders

Heading 1

Heading 2

The layout for this page uses two tables. The first table contains 3 columns and 2 rows. A second table is created in the bottom-left cell of the first table. The second table (in which you see the Excel chart and bulleted text) contains 1 column and 4 rows.

Table heading

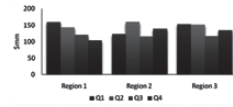


Table heading

- Notes that the table containing this bulleted list is a 4-row, 3-column nested table, inside a 3-column, 2-row first table.
- Notes also that the first paragraph style contains paragraph shading that bleeds off the edge of the page and the page numbering begins at the edge of the right margin. This formatting is accomplished with paragraph indents stored in the paragraph style.

Table heading

This SmartArt diagram was created in PowerPoint and pasted into Word as a PNG picture, where it has been cropped.



Notes also that the paragraph in which the diagram appears uses a custom paragraph style named Picture Placeholder, which adds paragraph spacing before and after the picture.

Page 2

Northwind Traders

Page Heading

Page Subheading

The layout for this page uses two tables. The first table contains 3 columns and 5 rows, where the second column and third row are used to create white space on the page. A third nested table appears in the bottom-right cell of the first table, providing individual space for the two charts that appear side-by-side.

Table heading

This SmartArt layout is used because of the shape of the table cell. If the shape of the cell were taller than wider, a different layout may have been better, to keep the text of readable size.



Table heading



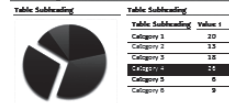
Table heading

Following are notes about the chart and table on the right.

- The nested table that contains the pie chart and numeric table uses the table style named Table Normal, which contains the same formatting as the custom first table style but with default cell margins. The left and right cell margins are used to create space between the columns in that nested table.

A third table style, named Financial Table, is used to format the numeric table with borders between rows. Text in all tables throughout the document is formatted using paragraph styles.

Table heading



Page 3

Northwind Traders

Page Heading

Page Subheading

The two tables used to create the layout on this page are separated by a paragraph mark. The tables are separate because their layouts are very different, and so they would be more difficult to edit as a single table. Note that the paragraph between the tables can contain text and be formatted with any paragraph style that's appropriate for your page content.

Table heading



Table heading

There are a total of six tables on this page. In addition to the two tables used for this layout, there are four nested tables, as follows:

- A 2-cell nested table contains the two SmartArt diagrams at left.
- A nested table is used for each of the three small financial tables below.

Table heading

Table Subheading	Value (mm)	Value (°)
Sample 1	122.45	42%
Sample 2	135.56	35
Sample 3	145.87	29
Sample 4	155.92	45
Sample 5	165.21	34
Sample 6	175.10	27
Sample 7	185.09	19

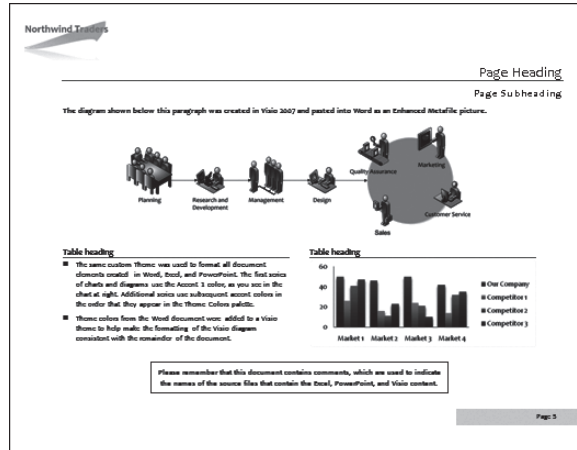
Table heading

Table Subheading	Value (mm)	Value (°)
Sample 1	195.87	28%
Sample 2	205.16	42
Sample 3	215.21	34
Sample 4	225.10	27
Sample 5	235.09	19
Sample 6	245.45	42
Sample 7	255.56	35

Table heading

Table Subheading	Value (mm)	Value (°)
Sample 1	265.21	34%
Sample 2	275.10	27
Sample 3	285.09	19
Sample 4	295.45	42
Sample 5	305.56	35
Sample 6	315.87	29
Sample 7	325.92	45

Page 4



This is what you can really do with Microsoft Office Word 2007.



Find this document, *Fearless.docx*, as well as the accompanying files containing the original graphics you see in this document (*Fearless.xlsx*, *Fearless.pptx*, and *Fearless.vsd*), in the sample files you can install from the Welcome tab of this book's CD.

## Staying in Control: Be the Boss of Your Documents

As introduced in Chapter 1, “Welcome to the 2007 Microsoft Office System,” Microsoft Word “likes” things to be as simple and as organized as possible. That doesn’t mean that you have to sacrifice design or complex layouts. On the contrary, the simpler and more organized your choices, the more complex your document can be without losing stability or complicating your efforts.

### The Three Levels of Word Formatting

The best place to start to understand why things work the way they do in Office Word 2007 is with the three levels of formatting. Word organizes most of the formatting you can apply in your document into these three levels—font, paragraph, and section—with font being the simplest of the three and section being the most complex.

Here’s a quick introduction to each of the three levels of formatting, including how they’re stored in your document.

## Font Formatting

Font formatting is anything you can apply to as little as one character, such as font face (for example, Times New Roman, Arial, Calibri) or font size. Any formatting available from the Font group on a Ribbon tab or the Font dialog box, as well as language setting, text borders, and text shading, are all types of font formatting.

When you apply font formatting in your document, it is stored directly in the character to which you apply it.

## Paragraph Formatting

Paragraph formatting includes anything you can apply to as little as one paragraph, such as paragraph alignment or indents. Any formatting available from the Paragraph group on a Ribbon tab (such as bullets, numbering, and paragraph borders and shading), or from the Paragraph dialog box, are types of paragraph formatting.

When you apply paragraph formatting in your document, it is stored in the paragraph mark at the end of the paragraph where the formatting appears.

### INSIDE OUT

#### Formatting vs. tools to manage formatting

If you think of styles as formatting, think again. Neither styles nor the new Themes feature are actually formatting. Rather, both of these features are tools for organizing, storing, and applying several types of formatting at once. For example, a paragraph style can store a range of paragraph formatting settings and font formatting settings together, to easily access and apply them together.

## Section Formatting

Section formatting is often thought of as page setup formatting. Any formatting that can be applied from the Page Setup group on the Page Layout tab or from the Page Setup dialog box, as well as text columns, page and footnote number formatting, and information about which header and footer appears on a page, are all types of section formatting.

To change any type of section formatting for just part of the document, a section break is required. That's because all section formatting is stored in the section break at the end of the section. Note that for single-section documents, section formatting is stored in the last paragraph mark in the document.

### Note

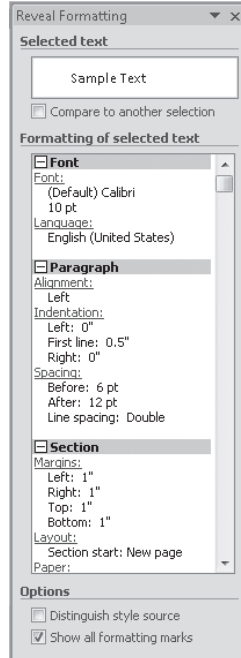
There are a few settings in the Page Setup dialog box that are not really section formatting, because you can't change them for just part of the document. These include the Different Odd And Even header and footer setting on the Layout tab, as well as the Multiple Pages settings on the Margin tab. Conversely, settings in that dialog box that you might not think of as formatting at all (such as Paper Source) are indeed section formatting, stored in a section break when you change the setting for just part of the document.

For more on how section formatting is stored, when section breaks are required, and how to manage section formatting, see Chapter 8, "Sections."

## Managing the Three Levels with the Reveal Formatting Task Pane

The Reveal Formatting task pane is a great tool for troubleshooting document formatting because you can see all formatting for a selection at a glance. But, Reveal Formatting can also help to bring into focus the concept of the three levels of formatting and how Word organizes formatting in a document.

As you see in the image that follows, a look at the Reveal Formatting task pane clearly demonstrates how formatting is organized along the three levels being discussed here.



To view formatting for your current selection, press SHIFT+F1. When using Reveal Formatting, keep the following in mind.

- Blue, underlined text in the Reveal Formatting task pane is linked to a dialog box where you can change the referenced type of formatting for your selection.
- The option Compare To Another Selection enables you to select any other content in the document to see an instant comparison of formatting for both selections.
- If your selection includes a table or paragraphs that contain bullets or numbering, you will see additional categories in the Reveal Formatting task pane. These are not additional levels of formatting. Bullets and numbering are paragraph-level formatting, as explained earlier. Tables are not formatting at all, as explained in the next section of this chapter. Breaking out these items simply helps you to quickly see formatting for a selection, because bullets, numbering, and tables can each contain quite a bit of unique formatting.

## Understanding Objects and Stories

A document consists of a range of content types (or objects) and formatting, both of which can be added to the body area of the document or to other areas, such as a header, a footnote, or a comment. These areas are known in Word as stories.

### The Story Behind Word Stories

Although the concept of stories in Word is most often addressed when using code (such as VBA) to interact with your document, it's an important part of the way Word organizes content. Understanding stories can help you stay in control of any document you need to create.

A story is simply a distinct component of the document that can contain its own content and formatting, similar to the concept of layers in a graphics program. In fact, stories are layers in some ways, as follows.

- Headers and footers (which also comprise watermarks), as well as footnote separators, are all story types that sit behind the main document story.
- Comments, as well as the text areas within text boxes or shapes, are story types that sit on top or in front of the main document story.

### Stories, Objects, and Formatting

A text box is a type of object (content type) that you can insert into your document. Wait a minute. Didn't I just tell you that text boxes are stories? Not exactly.

A text box is an object. The text area within that object is a discrete location, separate from the main document, into which you can add text and other content—that is, a story. (Note that there is just one of each story type in a document. So, for example, the text within the collection of all text boxes in a document belongs to the same story.)

So, what about tables? If the content area within text boxes is a separate story, is the area within tables a separate story as well? No. Unlike text boxes, tables become a part of the story into which they're inserted. A table sits in a paragraph mark, just like text. So, Word treats the content you add within a table very much like any other content in the applicable story. It is because of this that tables are often the simplest solution for creating complex layouts in Word.

In a nutshell, here are the simple definitions of formatting, objects, and stories.

- Stories are the locations in your document where you can add content and formatting.
- Objects are the content types you add to your document.
- Formatting is an attribute applied to an object or story.

## Finding the Simple Approach to Any Task

The reason that you as an advanced Word user will benefit from taking the time to distinguish between formatting, objects, and stories, is that it can help you find the simplest solution for whatever you need to do in a document.

My rule of thumb for the simplest approach to a document task is the method that will add the least information to the document and require the least work. For example:

- Anything that can be stored in a style (that is, paragraph and font formatting, or table structure formatting in the case of table styles) is the simplest way to apply formatting to text and objects, because styles consolidate several types of formatting into a single container—less work for you to apply, less information for Word to manage. See Chapter 5, “Styles,” to learn more about creating styles that simplify documents.
- As discussed earlier, tables are the simplest solution in most cases for organizing complex layouts, because they don't require adding a new layer (such as is required by text boxes). They also don't require adding additional sets of formatting information to the document, such as the section breaks you need when using text columns to lay out a page. Learn more about the logic behind using tables as a layout tool and how to make them work for you, in Chapter 6, “Tables.”

### Note

Understanding stories, objects, and formatting in your document can help you not just with the documents you create today, but can be a great help when you begin to venture into working with your documents programmatically. Learn more in Chapter 21, “VBA Primer.”



## Document Logic: Bringing Yourself to the Document

One of the easiest things you can do to stay in control of your documents is to remember what you already knew before you ever sat down at a computer. The two most important skills for simplifying complex document production have nothing to do with software features. They're skills you've been developing and using since childhood—planning and organization.

People often learn software programs by memorizing the set of steps necessary to execute tasks. When it comes to Word, that approach just won't get you as far as you might want to go. Using Word effectively at an advanced level requires that you take time to think and understand what's happening in your document. If that sounds like more of a commitment than you want to make to a software program, consider this: The time you spend planning, organizing, and thinking about your document is a fraction of the time most people spend on the point, click, and tear-your-hair-out method.

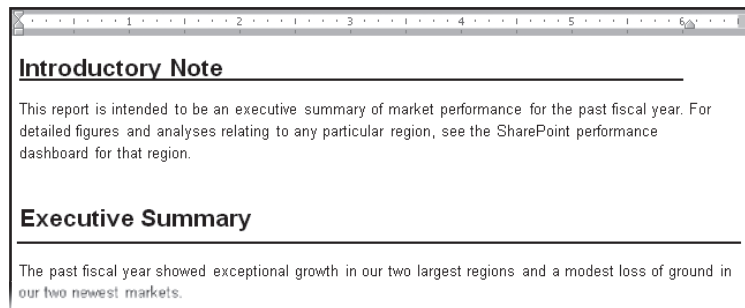
Staying in control of your document can be as simple as understanding what's happening on screen at all times. And that can be much simpler to do than you might think. Using tools such as the Reveal Formatting task pane, along with formatting marks (often referred to as nonprinting characters) and the available options for viewing your document, everything you need to manage your document effectively is right in front of you.

### Working with Formatting Marks

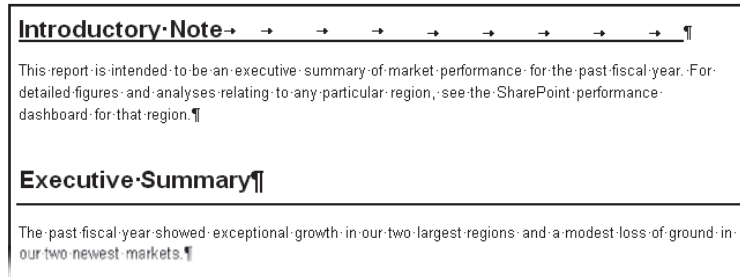
The issue of whether to work with formatting marks visible in your document is very simple: You simply can't know what's going on in your document without them.

They're annoying, they get in your way, it's hard to see what the document looks like when formatting marks are visible. Although I don't agree with those statements—I've used formatting marks for so long that they've become like background noise—I know that many of you feel that way. Well, sorry, there's no easy way around this one. Formatting marks tell you a great deal about how your document is formatted. You'll never be fully in control of a complex document without them.

For example, in the image shown here, why don't the right edges of the paragraph borders on the two heading paragraphs line up?



If you're looking at the ruler in the preceding image, assuming that your insertion point is in the first paragraph, you'll say it's because there's a right indent on the first paragraph. But, if you move the right indent in this case, it won't make any difference at all. Why not? With formatting marks visible, you can see the answer immediately. That's no border, as you can see in the following image. It's the old-fashioned, rudimentary work-around of underlining tabs.



Not only do formatting marks enable you to see the problem immediately, but you can also correct it quickly without trial and error, because you can see exactly what content you need to alter.

Take another example. Have you ever copied content from one part of a document only to have the formatting change when you paste that content? That happened because you pasted the content into a paragraph mark containing a different set of formatting.

As discussed earlier, paragraph marks store formatting. When you press ENTER twice to create a new paragraph, as you would on a typewriter, you're adding an extra, unnecessary set of formatting to your document.

So, not only is it less precise and, ultimately, more work to press ENTER twice after every paragraph than to add formatting for space before or after the paragraph to your paragraph styles, you're also adding an unnecessary set of content to the document that can get in your way later.

When you view formatting marks, you see spaces, tab characters, object anchors, page breaks, and other marks that inform you about how your document is constructed. But, you also see the paragraph marks, cell and row markers, and section breaks that store formatting, which means you have more information about the formatting in your document without having to look for it.

To view formatting marks, press the Show\Hide ¶ icon in the Paragraph group on the Home tab or press CTRL+SHIFT+8. The option Show All Formatting Marks is also available at the bottom of the Reveal Formatting task pane.

You can also customize, to some degree, which formatting marks appear on screen. To do this:

1. Click the Microsoft Office Button and then click Word Options.

2. On the Display tab of the Word Options dialog box, select the formatting marks you want to view.

### Note

When you turn on individual formatting marks using the steps provided here, they will remain on even if you turn off formatting marks using Show\Hide ¶ (CTRL+SHIFT+8).

## Using Views Effectively

Is it better to work in Print Layout view, Draft view (formerly called Normal view), Outline view, or Print Preview? The best answer to that question is all of the above. If you work in one view all the time, you might be doing yourself a disservice. Changing views based on the task at hand can save a lot of time and effort. Following is a summary of the benefits of each of these Word views.

View	When to Use It
Print Layout	Print Layout is the best view to use when creating complex documents, because you need to be able to see page layout to manage page layout. Print Layout view enables you to see exactly what your document will look like when printed, with the addition of formatting marks to help you stay in control.
Draft	Draft view doesn't show headers, footers, footnotes, or page layout, so it's not the best view to use for complex document creation. But, because of what you don't see in this view, it also uses less memory—so it can be faster to work in Draft view when simply editing text in a large document. Draft view always shows section and page breaks fully across the page, and it has an optional style area that shows the paragraph styles applied throughout the document. To turn on the style area in Draft view, in the Word Options dialog box, on the Advanced tab, find the Draft option under the Display heading.
Outline	When using Heading styles 1 through 9, or any styles with Outline Level formatting applied, this view is a great tool for quickly reorganizing content in your document. For example, click the plus sign that appears beside any top-level heading when in this view to automatically select it and all content that falls below it. Then, just drag and drop the entire selection to a new location. When you select Outline on the View tab in Word 2007, you see a new contextual Outlining tab that helps you manage the outline (similar to the Outline toolbar that appears in this view in previous versions). To return to your previous view, on the Outlining tab click Close Outline View.
Print Preview	Print Preview is a great way to quickly see your finished product without having to toggle formatting marks and table gridlines on and off. You can also disable the Magnifier on the Print Preview tab to click into the document and edit while in Print Preview. Note that editing in Print Preview is a bit more limited in Word 2007 than in previous versions. Only the Print Preview tab and contextual tabs will appear on the Ribbon when in this view. However, many formatting features will still work in Print Preview. To access those that you often use in this view, add them to your Quick Access Toolbar.

# Monitoring the Health of Your Document

You plan, you organize, you stay in control of your document, but still something goes wrong. Perhaps you inherited a document from someone else or added content to a document from another source. What do you do when the document refuses to behave?

Giving your document a time-out probably isn't an effective way to resolve the issue, but there's usually an easy solution.

## What Is Document Corruption?

Actually, let's begin with what corruption is not. *Corrupt* is, without a doubt, the most frequently misused word in document production. Yes, documents and content can become corrupt. But, just because something has gone wrong in your document doesn't mean it's corrupt.

The majority of problem documents I've seen across law firms, investment banks, and major corporations, have not been corrupt at all. Formatting errors or misunderstood formatting account for more than their share of documents labeled as corrupt.

- An outline numbered list incorrectly numbers paragraphs.
- A table falls off the edge of the page and ignores formatting commands to reset its size.
- Shaded paragraphs overlap in the printed document.

All of these are examples of common formatting errors often mistaken for document corruption. The problem, of course, is that when someone assumes a document is corrupt, they look for the wrong type of solution. In instances like the formatting error examples provided here, diagnosing and fixing the individual formatting problem is what you need to do. Extreme troubleshooting solutions are not only unnecessary, they won't get the job done. So, what are the most common solutions for the examples provided here?

- When paragraph numbering in an outline doesn't adjust to accommodate changes in the outline, check to see if the Start At value (also called the Set Numbering Value) has been set for some paragraphs. This value forces the paragraph to always show the specified number and not adjust for changes to the outline.
- When a table exceeds the width of the page or any desired width and won't respond to commands to adjust it (such as AutoFit To Window), check to see if the table contains more content than can fit within the desired width. For example, you might select the table and then press CTRL+SHIFT+< repeatedly, as needed, to reduce font size to see if this reduces table size as well.
- When shaded paragraphs look fine on screen but overlap in Print Preview or when printed, check to see the type of shading applied. Using Fill Color to shade paragraphs works fine in just about any scenario. But, using Pattern fills is another story. Patterns include a background and a foreground—information that some printers (as well as some e-mail clients) don't know how to handle.

In contrast to these simple solutions, the troubleshooting workarounds and extreme solution attempts I've seen for such formatting issues include stripping a 300-page document to plain text and reformatting it from scratch or converting all tables in the document to text and reformatting them with a variety of workarounds.

Poorly formatted documents can sometimes lead to corruption when content is mis-managed or content is added to the document from an incompatible source. But, the fact remains that corruption is not the same as problematic formatting.

## TROUBLESHOOTING

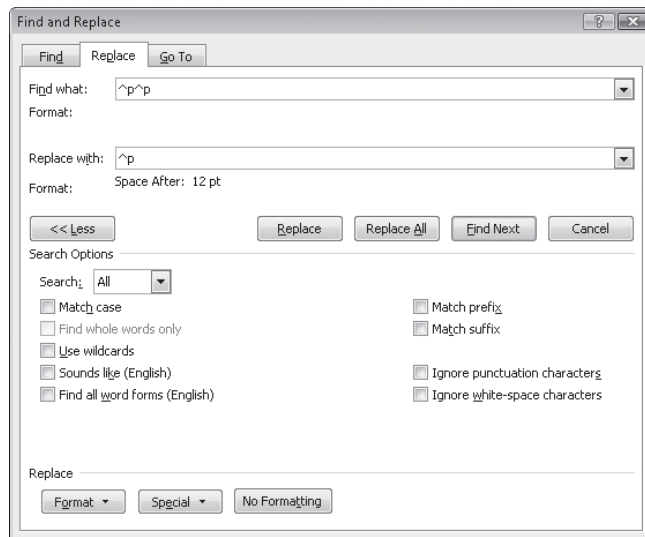
### How can I clean up bad formatting quickly throughout the document?

The Replace feature in Word is, of course, great for global corrections to text. But, Replace is also a fantastic troubleshooting tool for repairing problem formatting.

For example, if two paragraph marks are used to create vertical space between each paragraph in your document, you can replace all instances of two consecutive paragraph marks with one paragraph mark containing formatting for space after the paragraph.

To replace formatting marks as well as some content types (such as fields), select the item from the Special menu within the Replace dialog box. Or, if you know the character code for the item you want, you can type it directly into the Find or Replace box. The Format menu in the Replace dialog box gives you the option to find or replace a wide range of font and paragraph formatting as well as paragraph, character, or list styles.

In the Replace dialog box shown here, I'm searching for two consecutive paragraph marks and replacing them with one paragraph mark containing formatting for 12 points after the paragraph.



Corruption is when something happens in a document or element of a document that Word doesn't understand. For example, if a table becomes corrupt, Word might lose the ability to properly manage content in that table. So, pasting content into that table could cause the document to crash.

So, how do you distinguish between a formatting error and corruption? If an issue isn't obviously a formatting error, the easiest place to start is with Open And Repair.

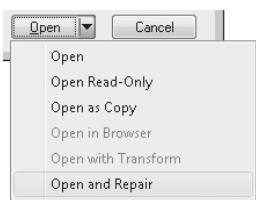
## Using Open And Repair

Open And Repair has been around since Word 2002, but it continues to improve with age. Essentially, Open And Repair diagnoses and, in many cases, repairs genuine document corruption. It's a great place to start because, if Open And Repair doesn't find corruption in your document, it's likely that the problem you need to be looking for is a formatting issue and not corruption at all.

When Open And Repair finds corruption in your document, a Show Repairs dialog box opens with a list of the corruption types found in your document (such as corrupt tables or styles). In many cases, you can select an error in the list and click Go To in order to be taken directly to the source of the problem. For those who remember the dreaded error message "A Table in this document has become corrupt" before the advent of Open And Repair—when you had to figure out for yourself which table was the troublemaker—you can see how this feature is an enormous timesaver.

To use Open And Repair, do the following.

1. Click the Microsoft Office Button and then click Open (or press CTRL+O).
2. In the Open dialog box, browse to and select your file.
3. Instead of clicking the Open button, click the arrow to the right of the Open button, as shown here, and then click Open And Repair.



When the document opens, if the Show Repairs dialog box does not appear, Word found no corruption in your document. If the dialog box does appear, take note of the errors and then click Close. To make the repairs permanent, save the document.

**CAUTION!**

In repairing some types of corruption, such as tables or numbered styles, Word might alter your formatting or even, in rare cases, your document content. Because of this, notice that documents opened with Open And Repair in Word 2007 always open as an unsaved copy of the original. It's a good idea to page through the document completely after closing the Show Repairs dialog box but before saving the document (especially if replacing the original), to ensure that no content or formatting has been changed.

Open And Repair can also be an excellent tool for ensuring the integrity of a complex document or template as you create it. I often open a healthy document or template with Open And Repair as I'm working on it, to ensure that no problems arise during construction.

**INSIDE OUT****Using the new file formats to repair corruption**

The new Office Open XML Formats provide additional options for addressing document problems. Because Office Open XML files are actually a collection of files, errors are more easily compartmentalized and so they can be more easily rectified. See Chapter 22, "Office Open XML Essentials," to learn more about fixing document problems through the file formats.

## The Five Tools You Need to Create Any Word Document

People often think that, because Word is so powerful, it would take far too much time to learn everything they need to create complex documents effectively. The fact is that, for all the power of Word, the list of what you need to learn to create most documents is much shorter than most people realize.

If you look through the Word content in a book like this one, you might pass over some things, believing them to be details you don't need. Well, some features are certainly more applicable to some people than others. For example, you might never need to include mathematical equations in your document; someone else might never need an index or a bibliography.

However, some things that might seem like details are actually essential components that can make all the difference in the world. When you know the right details, everything comes together. In Word, those details are the five tools you need to create any complex document.

- Styles
- Tables
- Graphics
- Sections
- Quick Parts

If the last item in that list looks foreign to you, it's because Quick Parts are new functionality in Word 2007. That last item in this list used to be fields—which have now been absorbed by the much broader and more powerful Quick Parts.

When you understand how these five features work together most effectively, no document is out of your reach. The next five chapters will give you the tools you need to bring the right details together and create great Word documents.