



# Wordman's Production Corner

By Dick Eassom

## Ten Things You Should Do With Microsoft® Word

### How to set Word's options to the optimum for proposal creation

#### The Problem

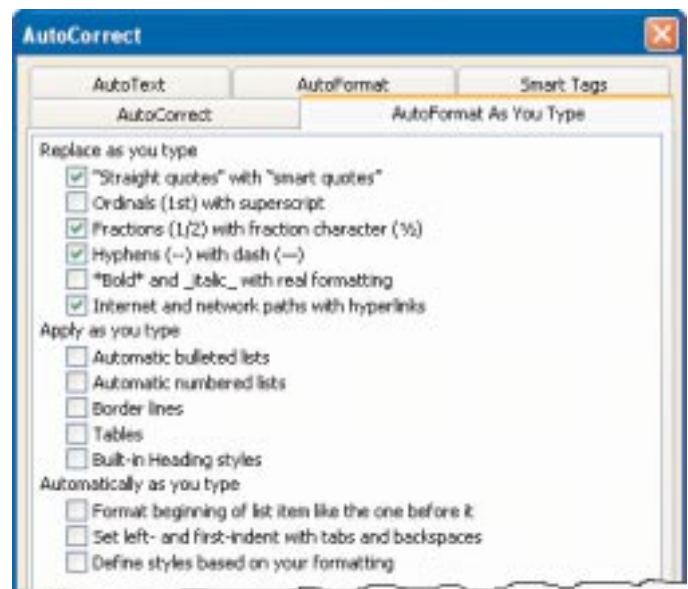
Many moons ago—actually, it was at the Annual Conference in Albuquerque—I gave a presentation called “Overcoming the Power of Word.” For this Wordman's Production Corner, I thought I'd revisit that early material and give you a simple list of the ten things you should do to Microsoft Word that will set it up optimally for proposal work. There are probably more than ten things, and the first one is not to throw it in the trash and use InDesign® or Quark®! As I have always said, with a bit of “Word Power,” Word can be a really effective tool for proposal creation.

By default, Word tries to help. It reacts to you pressing **Tab** as the first key on two successive lines and decides that you really wanted to build an indented list. Well, that's not the kind of help that we generally need when creating a proposal, or any complex document for that matter. We need to configure Word's options to stop it “helping.” All the following screenshots are from Word 2003, but basically are similar to prior versions.

#### The Solutions

##### 1. Turn off AutoFormat As You Type

Go to **Tools > AutoCorrect Options...**, and then select the **AutoFormat As You Type** tab on the **AutoCorrect** dialog:



You can uncheck virtually every option in the list, especially those that automatically try to help with list and

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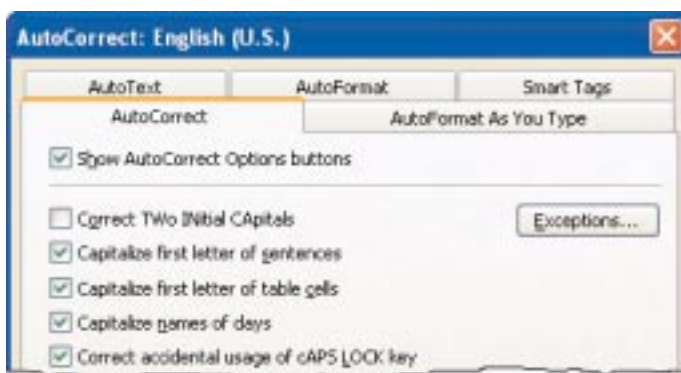
indent formatting! The last category, **Automatically as you type**, is all really bad ideas! The only ones I would leave checked are shown above and are relatively useful. Personally, I prefer the non-superscript versions of ordinal numbers, e.g., 1st rather than 1<sup>st</sup> but you may have a different preference or a company standard that dictates otherwise.

If you are not submitting an electronic version of your proposal document, then the hyperlink option is rather pointless. Note that you if you press **Ctrl+Z** immediately after Word converts an Internet path to a hyperlink, the hyperlink will be removed. That feature works for all these **AutoFormat As You Type** options.

If you've ever wondered why your style drop-down list ends up filled with a gazillion weird styles that you didn't create, you should uncheck **Define styles based on your formatting!**

### 2. Turn off AutoCorrect

Go to **Tools > AutoCorrect Options...**, then select the **AutoCorrect** tab on the **AutoCorrect** dialog:

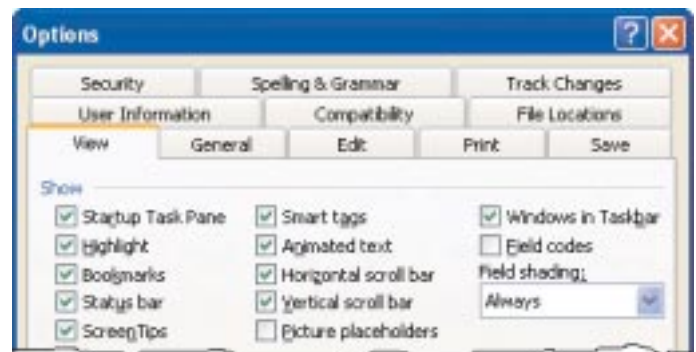


This is actually a useful tool, but make sure it is working for you and not against you! Go through the **Replace text as you type** list, remove any unwanted replacements, and, add your own if desired. The one option that I

would recommend unchecking is **Correct Two Initial Capitals**, as this feature messes up many of the ISO symbols, e.g., MHz.

### 3. Turn on Field Shading Always

Go to **Tools > Options...**, and then select the View tab on the **Options** dialog:



Select **Always** in the **Field shading:** dropdown. This will ensure that you can differentiate between text that you have typed and text generated from field codes, such as automatic caption numbers and cross-references. Word will display the latter on the screen with a pale gray background. **Smart tags** are, in my humble opinion, a relatively useless feature introduced with Office XP, and, along with **Animated text**, can be turned off if you're either not going to use them, or are not submitting electronically! Note that if you leave the Bookmarks option checked, any bookmarked text in your document is displayed enclosed in gray square brackets, e.g.,

[This is a bookmark.]

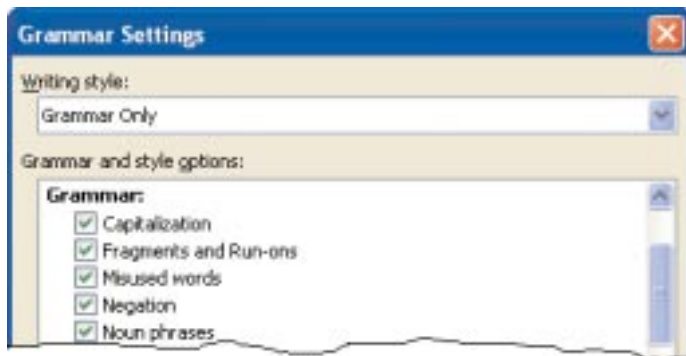
Thanks to Tammie Pasant at UGS for reminding me of that one!

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### 4. Set Formal Grammar Checking

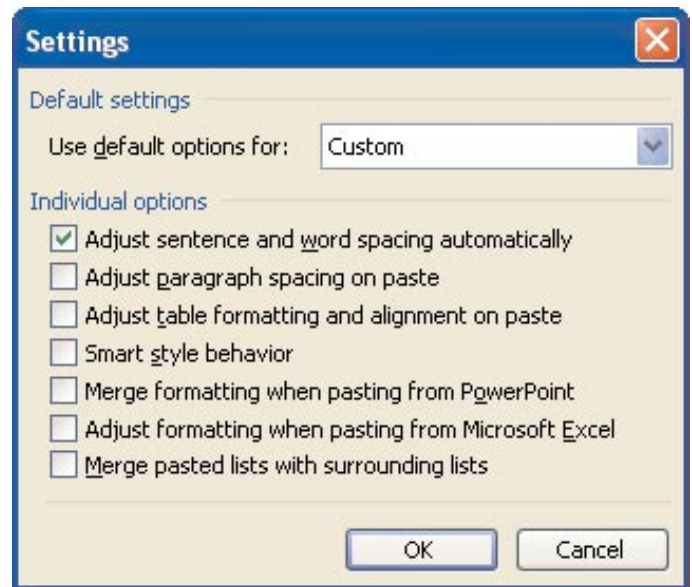
Go to [Tools > Options...](#), select the [Spelling and Grammar](#) tab on the [Options](#) dialog, then click on [Settings...](#)



Conventional wisdom says that we write proposals in active voice, present tense, first person for maximum effect (unlike my column!). This dialog allows you to ensure that Word highlights passive sentences, and the use of first person is not! And as for those darned split infinitives—well, there are a lot of options here and I suggest that you check them out for yourselves. To ensure you see the green squiggle underlining that signifies a grammar problem, you'll need to select all your text, go to [Tools > Language > Set Language...](#) and uncheck [Do not check spelling or grammar](#).

### 5. Dumb-down Smart Cut and Paste

Go to [Tools > Options...](#), select the [Edit](#) tab on the [Options](#) dialog. You can either disable all “smartness” by unchecking [Smart cut and paste](#), or click [Settings...](#) to see more options:

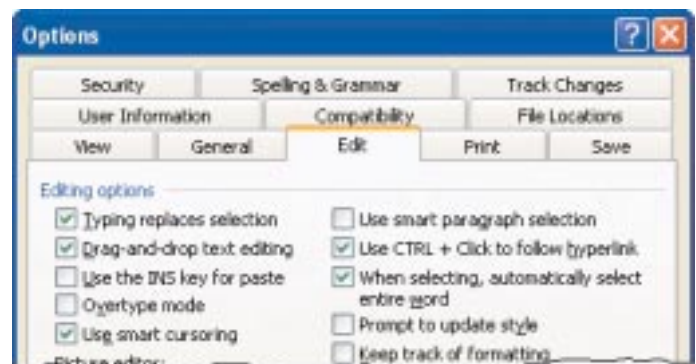


I find most of these options quite frustrating and, if any, the only one I would leave checked is [Adjust sentence and word spacing automatically](#), as shown above.

Leaving this checked will ensure that Word removes extra spaces when you delete text, and adds them when you paste text from the clipboard.

### 6. Don't Keep Track of Formatting

Go to [Tools > Options...](#), and then select the [Edit](#) tab on the [Options](#) dialog:



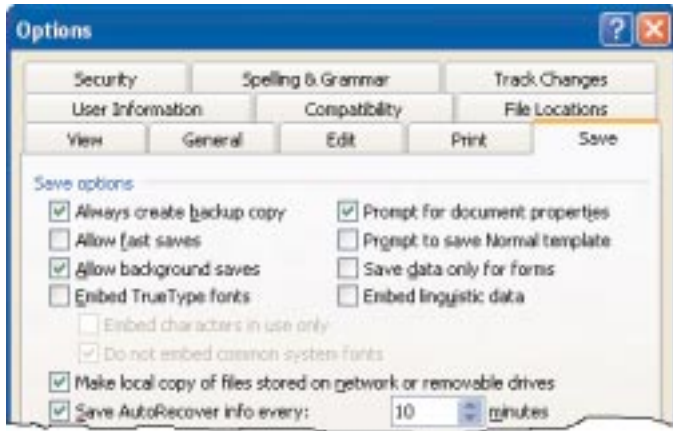
Similar to [Define styles based on your formatting](#), [Keep track of formatting](#) is also an unnecessary option and should be unchecked.

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## 7. Turn off Fast Saves

Go to **Tools > Options...**, and then select the **Save** tab on the **Options** dialog:



For those of you who saw my presentation at the 2004 APMP Annual Conference in Florida, or read the associated Wordman column on document security (see [http://www.apmp.org/docs/spring\\_04\\_4\\_9.pdf](http://www.apmp.org/docs/spring_04_4_9.pdf)), you'll know that Word documents are littered with hidden information. The worst form of these data is deleted content—by opening the document as **Recover Text from Any File** in the **File > Open** dialog, you can read everything that was previously deleted! This can be embarrassing or worse if the recipient is inquisitive (like me!). You can ensure this never happens by unchecking **Allow fast saves**, as shown above. This is an historical option from the early days, when PCs were really slow, and it was quicker to simply save the changes to the file, rather than resaving the file. A seriously bad idea nowadays.

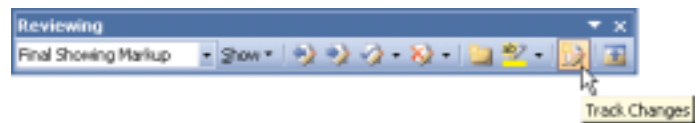
## 8. Turn off Track Changes (unless you really need to)

Tracking changes can be a useful thing when you're collaborating on a document, but is another potential security problem if the recipient should display the hidden

changes. You can quickly see whether you are tracking changes by looking at the status bar at the bottom of the Word application window:



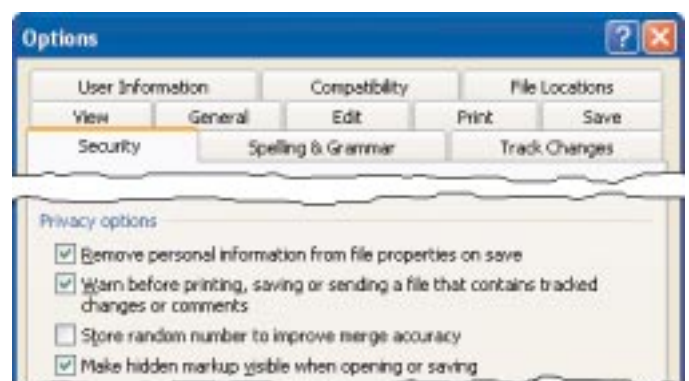
If **TRK** is shown as above, then you're tracking changes. If you really do need to track changes, then ensure that you're seeing the markup. Right-click on the menu and check **Reviewing** to display the **Reviewing** toolbar:



Ensure that **Final Showing Markup** is displayed in the dropdown. When you have finished editing the document, ALWAYS click on the **Accept Changes** icon (👉) on the toolbar, and select **Accept All Changes in Document**, then go to **File > Save As...** to save the file with a different filename. This will ensure that you have a clean version of the file.

## 9. Don't Save Personal Information

Go to **Tools > Options...**, and then select the **Security** tab on the **Options** dialog:



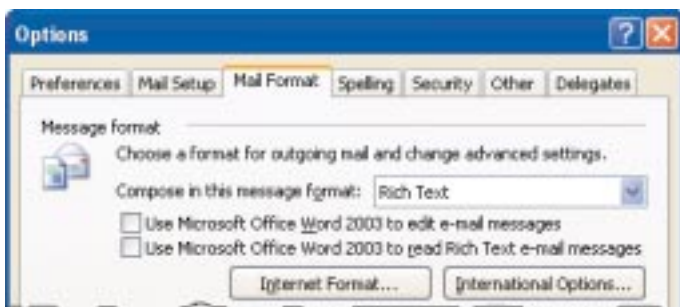
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I recommend that you check the options as shown above. Word uses the unchecked option, Store random number to improve merge accuracy, when you receive a marked up version of a document that you sent out by email. If checked, it will prompt you to merge the markup with your original version of the document. The last option, [Make hidden markup visible when opening or saving](#), is new for Word 2003.

### 10. Don't Use Word as Your E-mail Editor

OK, this isn't strictly speaking a Word option, but it is important for those of you that use Microsoft Outlook<sup>®</sup> as your e-mail application. In Outlook, go to [Tools > Options](#) and select the [Mail Format](#) tab on the [Options](#) dialog:



Why? Well, for starters, you rarely need the editing functions of Word to compose an e-mail—unless you have no life at all and enjoy sending the email equivalents of Tolstoy's *War and Peace*. But, if you're using Word and Outlook simultaneously, one can hang the other up,

depending on what you're doing. It's all to do with OLE (object linking and embedding), but I just ran out of column space...

### Summary

Microsoft Word is a very powerful application and is an ideal tool for proposal creation. If you make the changes that I've suggested above, you'll find Word is more controllable, predictable and secure. However, there are literally hundreds of options buried in Word dialogs, and I suggest that you take the time to investigate them all, armed with the Word Help files.

For those of you that enjoy my "Wordman's Q&A" at the APMP Annual Conferences, there'll be a 2-hour session at the 2005 event in Phoenix, Arizona. If you have any ideas for a tutorial during this session, please let me know at the e-mail address below.

If there's a problem you'd like a solution for, or a subject you'd like more information on, you can reach Wordman via Dick Eassom, Director of Project Management, at SM&A, Newport Beach, California—e-mail Dick at [dick.eassom@smawins.com](mailto:dick.eassom@smawins.com). As ever, thanks to Sean Jones of SM&A's Art Department for bring Wordman to life. Wordman is ©2001-2005 SM&A, and used with permission by APMP. ■