

TIME-SAVING TECHNIQUES FOR MICROSOFT WORD: BEST TIPS, SHORTCUTS, IDEAS, AND GUIDES

Speaker

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By Kelly Schrank

Zoe Wright works for Ideagen, one of the exhibitors at this year's conference. Every year, she offers a session on Microsoft Word, and the PDFs of the MasterClasses are all gathered on the company's website: <https://www.ideagen.com/word-masterclass/>. Despite the fact that the material would all be available on the website, the room was standing room only (with many attendees sitting on the floor).

Though there are about 350 commands in Microsoft Word, most people only use about 10% of them. This session covered the following commands and functions: selection of text, random text filler, extended clipboard, keyboard shortcuts, calculations, object linking and embedding, and document map.

Selection of Text

The first “tips, tricks, and shortcuts” showed easy ways to select text:

- To select a *word*, double-click in the middle of it
- To select a *line of text*, put cursor at start of line, then press **Shift + down arrow**
- To select a *sentence*, put cursor within sentence, then press **Ctrl** and click in sentence
- To select a *paragraph*, put cursor within paragraph, then click three times
- To select a *section*, put cursor within section, then press **Shift** and click once

Random Text Generator

For those who need to show the layout of a document before they have complete or approved text, Wright explained how to use the random/filler text feature. Place your cursor where you need the text, then type `=lorem (x,y)` or `=rand (x,y)`, with the number of paragraphs as **x** and the number of sentences as **y**, then press **Enter**. Word will fill in the requested number of paragraphs and sentences with Lorem Ipsum dummy text or random text generated by Word. The Lorem Ipsum text is dummy Latin text that has been used for centuries in printing. The random text appears to be random English text from Microsoft instructions.

Extended Clipboard

If you find yourself doing a lot of copying and pasting, you might find the extended clipboard helpful. It allows you to

copy and paste lots of text at one time (up to 24 snippets). Any text or graphics you copy will be placed in the **Clipboard** task pane. When you are ready to paste a snippet into your text, perform the following steps: (1) click the **Home** tab; (2) click the **Clipboard** dialog box launcher; (3) the **Clipboard** task pane will open, showing all of the snippets available; (4) click the **Paste All** button to paste all of the snippets at once in the order they are presented in the **Clipboard** task pane or choose which snippets you want to paste individually. Note: You cannot use the **Paste Special** command with items you are pasting from the **Clipboard** task pane. When you are done with the snippets and ready to save and close your document, press the **Clear All** button, or these paste options will be in the next Word document you open.

Keyboard Shortcuts

There is a whole page of keyboard shortcuts in the MasterClass online, but several are popular:

- Press **Ctrl + I** for italics
- Press **Ctrl + F** to open the Find command
- Press **Ctrl + Enter** to insert a page break
- Select text, then press **Alt + Ctrl + 1** to give it the Heading 1 style (works for default Headings 1, 2, and 3)

You can also see keyboard shortcuts in ScreenTips by hovering over the menu or buttons. If you are not seeing the keyboard shortcuts, then perform the following: press **Word Options > Advanced > Display > Show shortcut keys in ScreenTips**. Note: Not all buttons and menus have keyboard shortcuts.

In response to a question, Wright informed us that there was a way to have Word flag when you have 2 spaces after a period and when the Oxford comma is not being used. Each is flagged during your Spelling and Grammar check. To set up these options, perform the following: press **Word Options > Proofing > Settings** (next to **Writing Style**). Then choose the following under **Require**: whether you want the Oxford comma, (never, always, don't check) and how many spaces should be between sentences (1, 2, or don't check).

Calculations

While Word is certainly not as robust as Excel, you can do some simple calculations in a Word table. Go to **Table Tools > Layout > Formula** to see your options. One thing to keep in mind is that choosing which cells to put in the calculation is a little trickier in Word than Excel. For example, since the cells are not numbered, you must say whether the cells are above, below, or to the right and/or left. For example, you could put the **=SUM (above)** formula in the cell at the bottom of a row, and Word will add up the numbers in the cells above it. Other options

are =SUM (below), =SUM (left), =SUM (right). If Word's calculation features are not robust enough, you can also link or embed the Excel file in the Word document.

Object Linking and Embedding

Linking and embedding objects allows you to include materials such as a graphic, spreadsheet, PowerPoint presentation, or PDF in your Word document. The fundamental differences between linking and embedding are whether the object will continue to stand on its own in another location (linking) or whether it will be incorporated into the document wholly (embedding). The advantages of linking are a reduced file size and the ability to keep up with changes in the separate file, but it does require that those receiving the Word document also have access to the separate source file. Embedding an object eliminates the requirement for access to the separate source file, but it will not be updated if the separate source file is changed, and file sizes can get burdensome with Word documents containing embedded objects.

To link an object, place your cursor where you want the object (or an icon for the object), then press **Insert > Object > Create from file > Browse....** Find the object, then click the **Link to file** box. If you would like to display an icon instead of the object, click the **Display icon** box. You can change the icon or its text to be something more helpful than a file name; for example, "Trial Data—Click Here." When you're done, press **OK**. If the source file is updated, your link will need to be updated. This is done automatically when you open and close your document, or you can do it manually.

To embed an object, place your cursor where you want the object, then press **Insert > Object > Create from file > Browse....** Find the object, then press **OK**.

Document Map

The document map function allows you to use the power of the **Navigation** pane to reorganize sections of your document quickly and without a lot of cutting and pasting. Wright explained this as taking the Outline View one step further. It does require that you use the Headings styles in your document. When you are looking at the Headings in your document in the **Navigation** pane, you can move the headings around, and the text that falls within each section will move with the headings. Word will also renumber your headings if you have numbered headings.

All of these topics are covered, some in much more detail, in the Part Three MasterClass online: <https://www.ideagen.com/word-masterclass/>.

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BEST PRACTICES FOR WRITING AND EDITING CME NEEDS ASSESSMENTS

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In this well-attended open session, only 2 or 3 in the audience had any experience preparing needs assessments for continuing medical education (CME) credits. I was barely familiar with the topic when the session began, yet by the end, my team and I had prepared a feasible needs assessment that reflected current best practices!

What Is a Needs Assessment?

Whether they are physicians, nurse practitioners, or pharmacists, all licensed health care providers must maintain a high level of practice by earning CME credits to keep their knowledge and effectiveness current. Needs assessments determine what health care professionals need to learn (and thereby help determine CME offerings) by identifying and analyzing the gaps that exist between what is customary (actual practice) and what the standard should be (optimal practice). In a 2016 *AMWA Journal* scholarly article that surveyed current methods for preparing needs assessments, authors Don Harting and Nathalie Turner explained that the activity of clearly identifying the actual practice gaps is essential. Also known as gap analyses, needs assessments "guide the development of educational interventions, with the ultimate goal of improving patient care."

To develop an accredited CME program, several other ingredients, in addition to the needs assessment, make up a typical request. These include a budget, a schedule, an audience generation plan, and an outcomes measurement plan. Although the needs assessment may be only 1 small piece of the entire pie, it plays an essential role in the planning process. For a CME offering to be approved by the governing body (such as the Accreditation Council for Continuing Medical Education, the organization that regulates CME for physicians), the education provider must be able to demonstrate that the offering was based upon an assessment of need (ie, knowledge, competence, or performance) that underlies a substantive gap in clinical practice.

A Needs Assessment of Needs Assessments

In 2010, Harting partnered with fellow AMWA member Sandra