

Expanding Your Toolbox to Make You a More Productive Editor

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If you use Microsoft Word to edit other people's work, you probably have your own bag of tricks to get the job done. In this proceeding, I will share some of my tips and tricks, gathered from many years of experience editing different types of documents in the hopes that you will learn something new to make you a more productive editor. My goal is to cover a broad array of technical solutions: reminding you of some shortcuts you may have learned and forgotten; covering some time savers like making an Editing Tools tab in Word and customizing the Spell Check to work harder for you; and automating some of your editing tasks using advanced find and replace with wild cards and simple macros.

Word Add-ons

PerfectIt

For those editing long documents with lots of abbreviations, specifically medical writing, this software is worth the money. It can generate a list of abbreviations used, tell when they have not been expanded on first use, and point out if they have been expanded more than once.

Have words that someone ALWAYS misspells? Or changing from US to UK spelling or vice versa? It can flag particular words, so even though you have to define it once, it will do the work for you once defined. Out of the box, it can help you fix inconsistencies. Create separate styles for separate clients, and it can do a lot of the work for you.

Website: <https://intelligentediting.com/>

Cost: \$70 per year

Grammarly

This addition is controversial in some circles. I use the free version, but I have heard that the paid version is not worth the money, and even worse, that it makes life more complicated by flagging too much. It's an add-on to Chrome, so it can conduct a spell check and grammar check on your emails and anything you type in any software or apps you use (desktop or online).

Website: <https://www.grammarly.com/>

Cost: free

Keyboard Shortcuts

There are over 250 keyboard shortcuts in Word. We all have our favorites, and certain ones that everyone knows. Here are a few of my lesser-known favorites:

Operation	Shortcut
Open Word Count Dialog box	Ctrl + Shift + G
Left align text	Ctrl + L
Format a letter to subscript	Ctrl + +
Format a letter to superscript	Ctrl + Shift + +
Insert an endnote	Ctrl + Alt + D

Table 1. Keyboard Shortcuts.

Quick Access Toolbar

Some frequently used commands are not conveniently located or may require too many clicks to access in Word's default location. You can add many of these commands to your Quick Access

Toolbar (QAT) to save yourself precious steps in longer sequences.

With many of these types of customizations, you have to know what you want to do ahead of time, it may take some time to figure out what Word calls a command and where it is located, and you may not be able to make your shortcut quite as fast as you might like.

But once you have all that, here's how you do it:

1. Right-click on ribbon.
2. Choose **Customize the Quick Access Toolbar**.
3. You can **Add** or **Remove** items from your QAT.
4. Click **OK** when done.

Editing Tools Tab

Creating your own Editing Tools tab is straightforward but can save you time with actions you take repeatedly.

This is very similar to customizing your QAT; here's how you do it:

1. Right-click on ribbon.
2. Choose **Customize the Ribbon**.
3. Click the box next to items you want or don't want in your ribbon.
4. Click **New Tab** button to create a new tab.
5. Choose commands from left, then press **Add** to move them to right.
6. Click **OK** when done.

Auto Correct List

Customizing your Autocorrect list (**Options > Proofing > Autocorrect**) is one way to make Word's Spell Check work harder for you. There are many misspelled words already there, but you can add your own commonly misspelled or mistyped words to Autocorrect list.

Custom Dictionary

Your Custom Dictionary is where you add new words while you are running Spell Check and you ask it to **Add to Dictionary**.

You can also manually add new words by performing the following steps:

1. Click the **File** tab, and then **Options**.
2. From the **Word Options** dialog, click the **Proofing** tab.
3. Click the **Custom Dictionaries...** button.
4. Click **Edit Word List** button.
5. Type in new words to add and/or delete words that you mistakenly added.

Exclusion Dictionary

Your Exclusion Dictionary allows you to type in words that you want flagged as misspelled, even if they may not be wrong according to a traditional dictionary.

To modify the exclusion dictionary for a language, perform the following steps:

1. Copy this address (with your username as indicated) and paste in your Windows browser to find the following folder:
C:\Users\username\AppData\Roaming\Microsoft\UProof.
2. Locate the exclusion dictionary for US English: ExcludeDictionaryEN0409.lex.
3. Right-click the file, click **Open with**, and then select a text editor such as NotePad.
4. Add each word that you want the dictionary to flag.
5. When you are finished, click **Save** on the **File** menu, then click **Exit**.

Navigation Pane

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. 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.

Find and Replace—Advanced

Under **More>>** in the **Advanced Find** section, there are other ways to search for items, like **Match case**, **Ignore punctuation characters**, and

Ignore white-space characters that can be helpful in specialized situations. Under **Format**, you can search for highlighted items (**Highlight**), and under **Special**, you can search for special characters like an em dash.

Find and Replace—Wildcards

Using wild cards lets you get even more specific in **Advanced Find**.

Wildcard	What it Finds
?	Any single character
#	Any single number
*	Any string of characters
<	The beginning of a word
>	The end of a word

This list is just the tip of the iceberg. Wildcards can get a little or a lot more complicated, depending on what you do with them.

Find and Replace—Simple Macros

If you're organized and have a set of find and replace actions that you perform with each document you edit, you can record a macro that accomplishes all of your find and replace actions much more quickly. You just need to test it for any unintended consequences. You can also use some of what you know about wildcards to make the macro more efficient and accurate.

To record a simple macro, perform the following steps:

1. Click the **Developer** tab.
2. Click the **Record Macro** button.
3. Give your macro a name (no spaces).
4. Click **Button**.
5. When the **Customize the Quick Access Toolbar** window displays, click the **Add** button.
6. Click the **Modify** button.
7. Choose a button image and click **OK**.
8. Go through the steps you want in your macro.

9. When you're done, go back to the **Developer** tab and click the **Stop Recording** button.
10. Test it!

Note: If you don't have the Developer tab showing, use what you've learned about customizing the ribbon to display it!

Editing Checklists

Creating and using an editing checklist for a particular type of document can really help you (and your team) be more efficient and consistent. But a checklist is no good unless you use it! Being able to check off items you have completed lets you know where you left off when you've been interrupted, or you go off on an error-finding tangent.

Here are 9 steps to a great editing checklist:

1. Start with a type of document you edit often
2. Document your actions
3. Add specifics—show and tell
4. Put in order
5. Start BIG
6. Go smaller
7. Add mechanics
8. Add tracking items
9. Test, revise, test, revise, use

For more details, go to SlideShare for my handout: <https://www.slideshare.net/kellyschrank/how-to-create-an-editing-checklist>

Resources

Grammarly. <https://www.grammarly.com/>.
PerfectIt. <https://intelligentediting.com/>.

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Author Biography

Kelly Schrank has been in technical and medical communication for over 20 years. After stints as a medical editor, communications manager, and technical writer in pharmaceutical, cybersecurity, and many other industries, she has just started her own business Bookworm Editing Services, with a focus on formatting and editing formulary dossiers. She also enjoys editing proposals, slide decks, training materials, and many other types of documents.