



Tools to Enhance Your Productivity as an Editor

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editing services

Handout

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Word Add-ins

PerfectIt

For those editing long documents with lots of abbreviations, 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.

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

Cost: \$49 per year (with AMWA discount)

Available in Word, not yet for PowerPoint

Grammarly

The free version is all you need. Because it's an add-in to Chrome, 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

We all have favorite keyboard shortcuts, but there are so many we are not using. Here are some keyboard shortcuts I wish I had known before doing this research.

Endnotes

For those still using endnotes and cross-references using Word's functionality rather than the Endnote program, having a keyboard shortcut for inserting an endnote is helpful.

Operation	Shortcut
Insert an endnote	Ctrl + Alt + D

Available in Word, not PowerPoint

Left Align Text

This shortcut is helpful for quickly changing errant text from full justification to left align.

Operation	Shortcut
Left align text	Ctrl + L

Available in Word and PowerPoint

Word Count Dialog Box

This shortcut is helpful if you are putting together social media posts with character and word limitations.

Operation	Shortcut
Open Word Count Dialog box	Ctrl + Shift + G

Available in Word, not PowerPoint

Subscript and Superscript

The subscript and superscript shortcuts are essential in medical editing. If writers copy and paste text from another document, they will often miss that subscript and superscript text has been made normal size. These shortcuts are helpful when fixing normal size text to superscript or subscript.

Operation	Shortcut
Format a letter to subscript	Ctrl + =
Format a letter to superscript	Ctrl + Shift + =

Available in Word and PowerPoint

Note: For instructions on how to see all the keyboard shortcuts, check out this article:
Pinola, Melanie. "How to See All of Microsoft Word's Keyboard Shortcuts." January 29, 2016. Laptop website.
<https://www.laptopmag.com/articles/see-all-word-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.

Here is a default QAT:



The default QAT in Word contains the following:

- AutoSave (O365)
- Save
- Undo
- Redo
- Touch/Mouse Mode (for touchscreen laptops)

You can customize the QAT to display whatever you need or want. You can display over 20 commands there; this differs by version, mode, and size of screen. Displaying your most-used commands on the QAT can really save you time.

Available in Word and PowerPoint

Here is an enhanced QAT, useful for an editor:



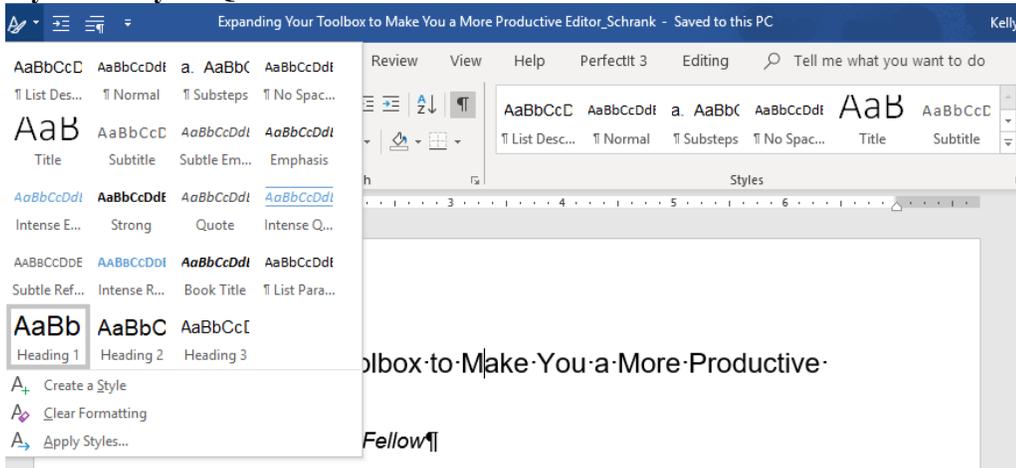
This editor's QAT in Word contains the following:

- AutoSave (O365)
- Save
- Undo
- Redo
- Touch/Mouse mode (for touchscreen laptops)
- Text Styles (Styles Gallery)
- Paragraph Indent & Spacing
- Para Keep with Next
- Custom macro with icon(user-created; to be discussed later)

Text Styles (Styles Gallery)

Moving the Text Styles command to the QAT brings up the complete Styles Gallery at the click of a button. As you can see in the following screenshot, there are only four to seven styles that will show in the Styles Gallery in a normal setup, which means you spend a lot of time opening the whole Style Gallery just to apply a style. Having this button available is a little quicker, only one click faster (if you're not in the **Home** tab), but it is more direct and therefore less annoying.

Style Gallery on QAT



Paragraph Indent & Spacing

Moving the Paragraph Indent and Spacing command to the QAT is much quicker than going through the menus, unless you are already in the **Layout** tab

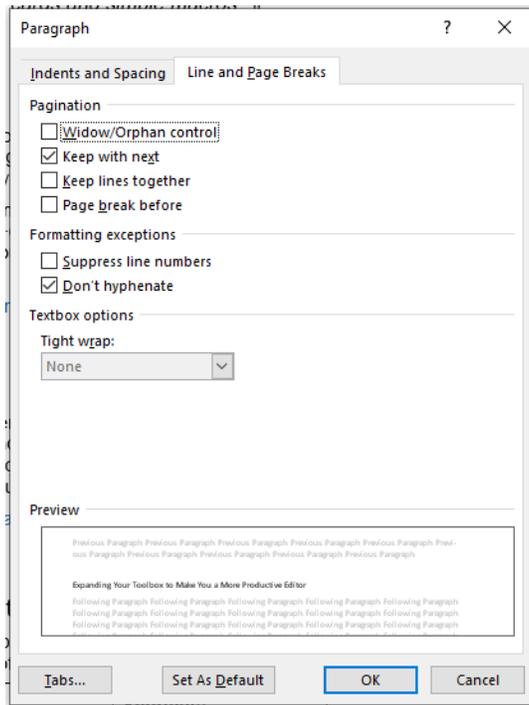
When you are in any other menu, it saves you one click, but if you need to access this command often, then it's worth it.

Paragraph Indent & Spacing on QAT



Para Keep with Next

The Keep with Next function is really helpful in smoothing out the layout in a document, but in editing other's documents, it is obvious that many people do not know how to use it correctly. It seems to go in one of two ways: *every* line has the Keep with Next applied or *none* of the lines have Keep with Next applied. In these cases, you might find yourself in the **Paragraph** window often, which is usually three clicks away from the **Home** tab.



After adding the button for Para Keep with Next to the QAT, you can click that button instead of clicking the **Layout** tab, then the dialog box launcher in the **Paragraph** group, then the box next to **Keep with Next**.

Disclaimer: Unfortunately, you cannot easily make the button an icon or smaller, like you can with other buttons discussed in later posts.

Custom Macro

How to create a macro (and assign a QAT icon to it) is discussed [here](#).

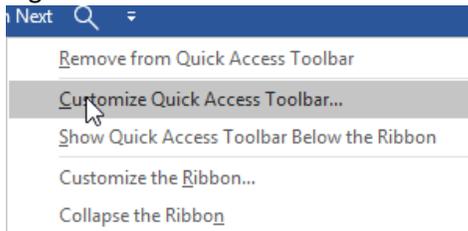
How To Add Commands to QAT

Commands Discussed Above

In the examples above, you can use the name of the command on the QAT to find it in the **Customize Quick Access Toolbar** window. Following the steps in this section will help you add any of the commands discussed in this post to your QAT.

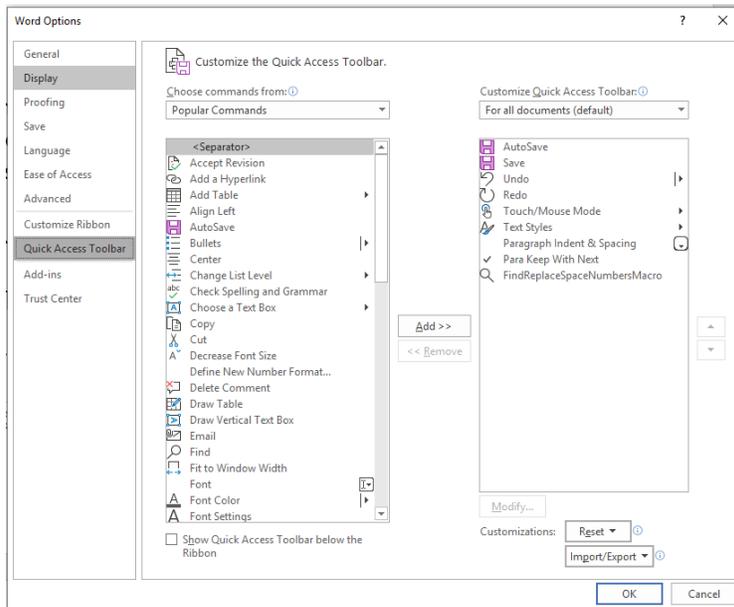
Here's how you do it:

1. Right-click in ribbon.



2. Choose **Customize the Quick Access Toolbar**.

3. Choose a command from the list on the left.



4. Click **Add** to add command to your QAT.

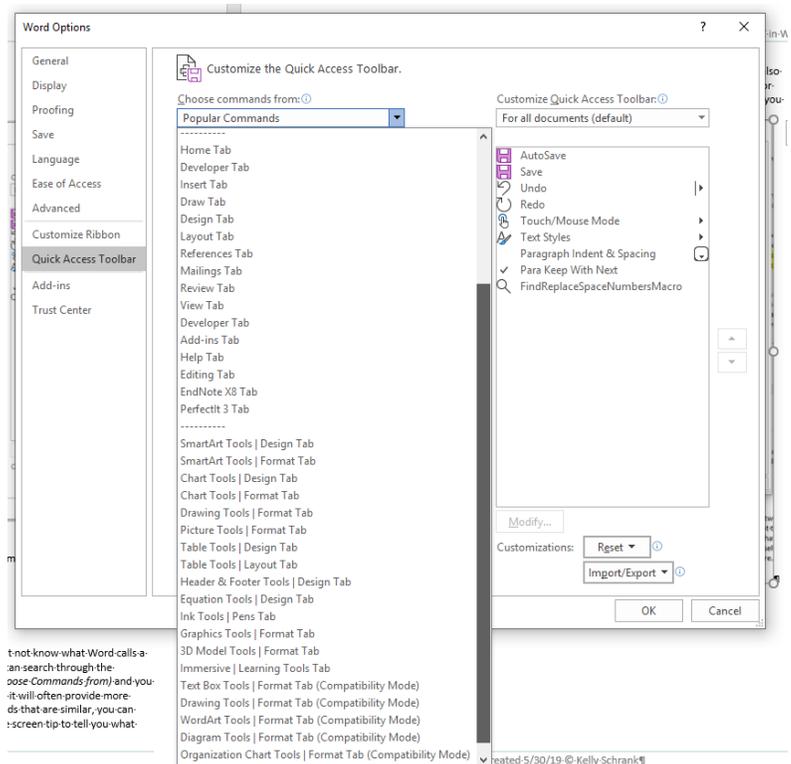
Hint: Word's default under **Choose Commands from** is *Popular Commands*, but you can find much more if you change it to *All Commands*.

5. Click **OK** when done.

Commands NOT Discussed in Post

When you are considering other commands to add to your QAT, you might not know what Word calls a certain command. This requires a little research on your part. Often, you can search through the **Customize Quick Access Toolbar** window (choose **All Commands** from *Choose Commands from*) and you might find what you need quickly. If you hover over the commands listed, it will often provide more information on what the command does.

If there are a couple of commands that are similar, you can add the similar commands to QAT, then go to your QAT and either use the screen tip to tell you what the commands does or test it out. (Later, you remove the commands you don't need.) You can also specify in *Choose Commands from* that you want to see all of the commands in a particular tab or particular tools on a particular tab. Those are helpful if you know where you normally find the commands you use on a regular basis.



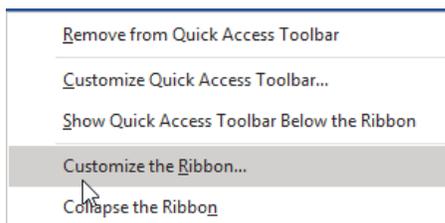
Available in Word and PowerPoint

Editor Tools Tab

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

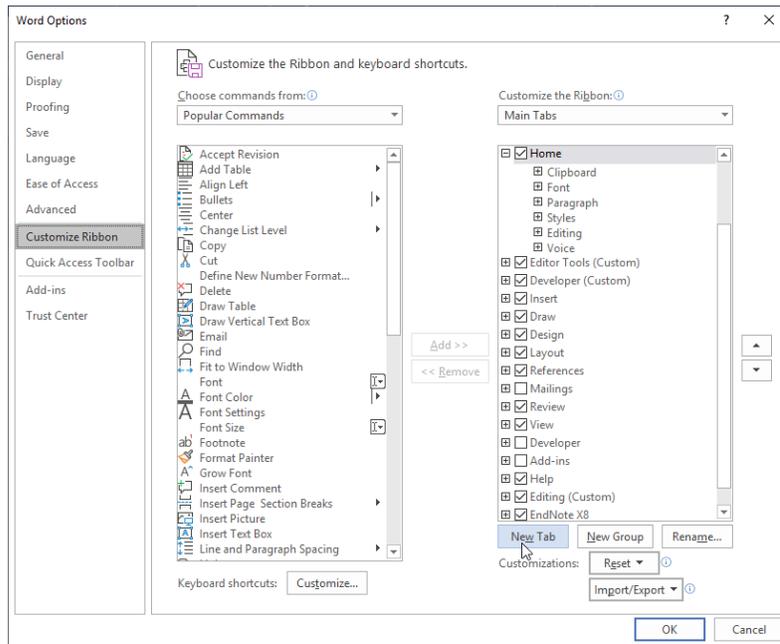
Here's how you do it:

1. Right-click in ribbon.



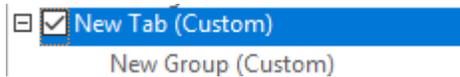
2. Choose **Customize the Ribbon**.

3. Click **New Tab** button to create a new tab.

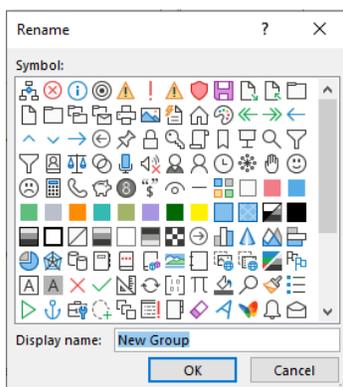


Hint: Word's default under **Choose Commands from** is *Popular Commands*, but you can find must more if you change it to *All Commands*.

4. Once a new tab is created, click **New Tab (Custom)**.



5. Click **Rename** button to give your tab a name.
6. Type a name, then press **OK**.
7. When the tab is created, a new group will also be created automatically.
8. Click **New Group (Custom)**.
9. Click **Rename** button to give your group a name.



10. Type a name, then press **OK**.
11. Click **New Group (Custom)** to prepare to add commands to the group (and tab).
12. Choose commands from left, then press **Add** to move them to right.
13. Click **OK** when done.

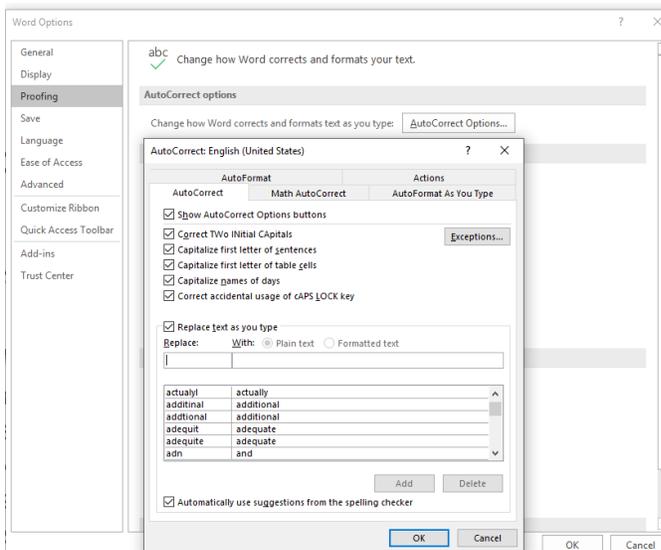
Available in Word and PowerPoint

Auto Correct List

Customizing your AutoCorrect list 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 mis-typed words to the AutoCorrect list.

Add your own misspelled or mis-typed words to AutoCorrect list:

1. Type the word incorrectly into a Word document (and add a couple of spaces after).
2. Select the word.
3. Go to **File > Options > Proofing > AutoCorrect Options**.
4. In **AutoCorrect** tab, under **Replace Text as You Type**, your word should be under the **With** column.
5. Type the correct spelling of the word under the **Replace** column.
6. Click **OK**.



Available in Word and PowerPoint

Shortcuts for Common Symbols

The following shortcuts are default in Word. You might use the symbols regularly, but did you know they had a shortcut?

Symbol	Shortcut
©	(c)
™	(tm)
®	(r)

Check the AutoCorrect list for other shortcuts you may not know about by exploring **File > Options > Proofing > AutoCorrect Options**.

If there is not a shortcut for a symbol you often use, create your own shortcut:

1. Insert a symbol that you use often that's hard to access into a Word document (and add a couple of spaces after).
2. Select the symbol.
3. Go to **File > Options > Proofing > AutoCorrect Options**.
4. In **AutoCorrect** tab, under **Replace Text as You Type**, your symbol should be under the **With** column.
5. Type something you will remember to type using symbols or letters easily found on the keyboard under the **Replace** column.
6. Click **OK**.

The following shortcuts were added based on shortcuts in the AutoCorrect list. The first and second use an underscore, followed by a bracket, since those are symbols easily found on the keyboard. The third uses an underscore followed by a plus sign. The last follows the shortcuts above by putting a word in between parenthesis. These are symbols used a lot in medical editing that are not easy to find in the Symbols list.

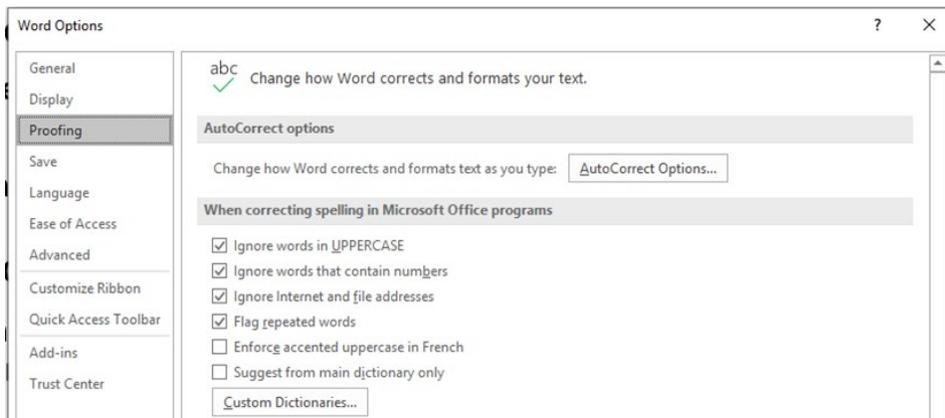
Symbol	Shortcut
≥	_>
≤	_<
±	_+
✓	(check)

Custom Dictionary

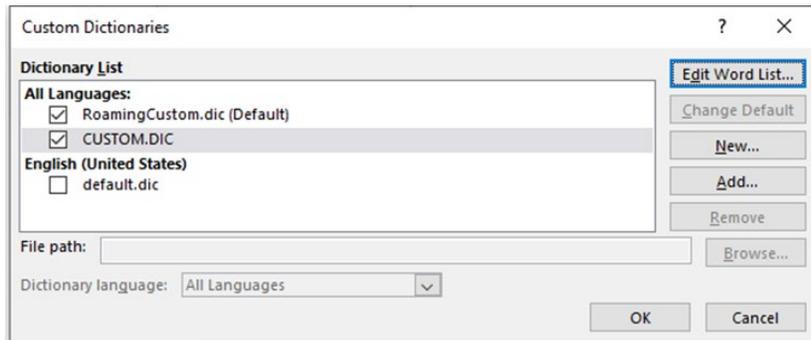
Your Custom Dictionary is where Word stores new words when you are running Spell Check and you ask it to **Add to Dictionary**. You can also manually add new words as shown below. This can save time when you are running Spell Check with unique words that you will be using in the future.

Add new words to your custom dictionary:

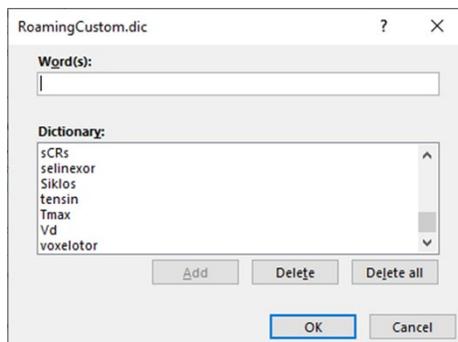
1. Click the **File** tab, and then **Options**.
2. From the **Word Options** dialog, click the **Proofing** tab.
3. Click the **Custom Dictionaries** button, then **OK**.



4. Click **Edit Word List...** button.



5. Type in new words to add, click **Add** button, then **OK**.



6. Delete words that you mistakenly added by clicking on the word(s), then clicking the **Delete** button, then **OK**.

Available in Word and PowerPoint

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. For instance, many people type *manger* instead of *manager*; you can put *manger* in your exclusion dictionary, and it will be flagged as misspelled during spell check.

Before you get started...you'll need to know your username on your computer.

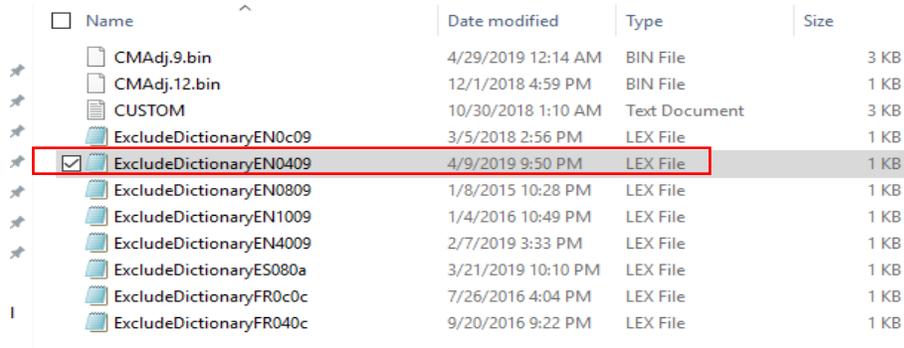
To modify the exclusion dictionary for a language, perform the following steps:

1. Open your Windows browser or File Manager.
2. Copy this address (with *your* username as indicated):
C:\Users*username*\AppData\Roaming\Microsoft\UProof.

3. Paste in your Windows browser or File Manager:

This PC > Windows8_OS (C:) > Users > **KellsFury** > AppData > Roaming > Microsoft > UProof

4. Locate the exclusion dictionary for US English: *ExcludeDictionaryEN0409.lex*.



Name	Date modified	Type	Size
CMAAdj.9.bin	4/29/2019 12:14 AM	BIN File	3 KB
CMAAdj.12.bin	12/1/2018 4:59 PM	BIN File	1 KB
CUSTOM	10/30/2018 1:10 AM	Text Document	3 KB
ExcludeDictionaryEN0c09	3/5/2018 2:56 PM	LEX File	1 KB
ExcludeDictionaryEN0409	4/9/2019 9:50 PM	LEX File	1 KB
ExcludeDictionaryEN0809	1/8/2015 10:28 PM	LEX File	1 KB
ExcludeDictionaryEN1009	1/4/2016 10:49 PM	LEX File	1 KB
ExcludeDictionaryEN4009	2/7/2019 3:33 PM	LEX File	1 KB
ExcludeDictionaryES080a	3/21/2019 10:10 PM	LEX File	1 KB
ExcludeDictionaryFR0c0c	7/26/2016 4:04 PM	LEX File	1 KB
ExcludeDictionaryFR040c	9/20/2016 9:22 PM	LEX File	1 KB

5. Right-click the LEX file, click **Open with**, and then select a text editor such as Notepad.
6. Add each word that you want the dictionary to flag.
7. When you are finished, click **Save** on the **File** menu, then click **Exit**.

Note: The exclusion dictionary applies to all of your Office products; so even though you may add it to help you in Word, it will also flag words in Excel and PowerPoint.

Available in Word and PowerPoint

Navigation Pane

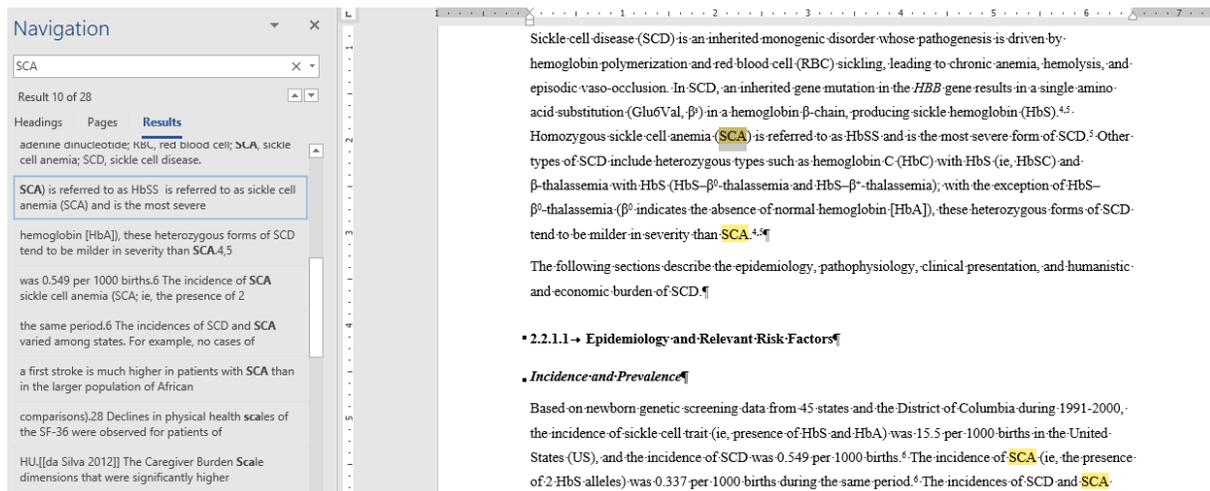
Results Tab

Editors are laser focused on consistency, and the *newish* **Navigation** pane makes checking for the consistency of words and phrases in a document SO much easier. This allows you to see what's going on in larger documents better than when you scroll through the document or use the Find to search through the document looking for words or phrases.

Here's how you do it:

1. If it's not open already, click Ctrl-F to bring up the **Navigation** pane.
2. Click the **Results** tab in **Navigation** pane, then type in a word or phrase to search.

The **Navigation** pane will show the word or phrase in bold, and the word or phrase will be highlighted yellow in the document.



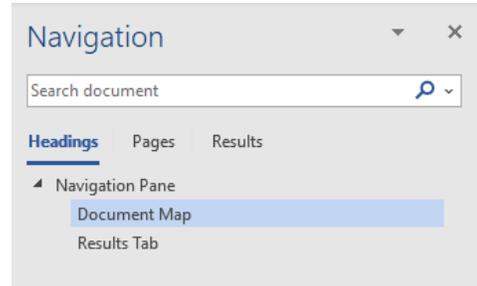
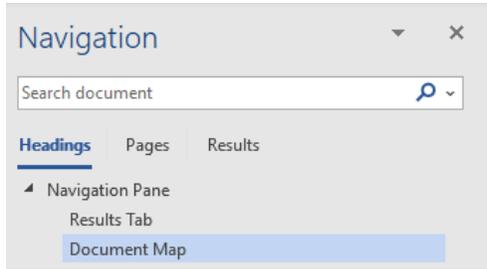
Document Map

But that's not all you can do in the **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 styles for the headings in your document.

When you click on the **Headings** tab 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.

Here's how you do it:

1. Click the heading you want to move.



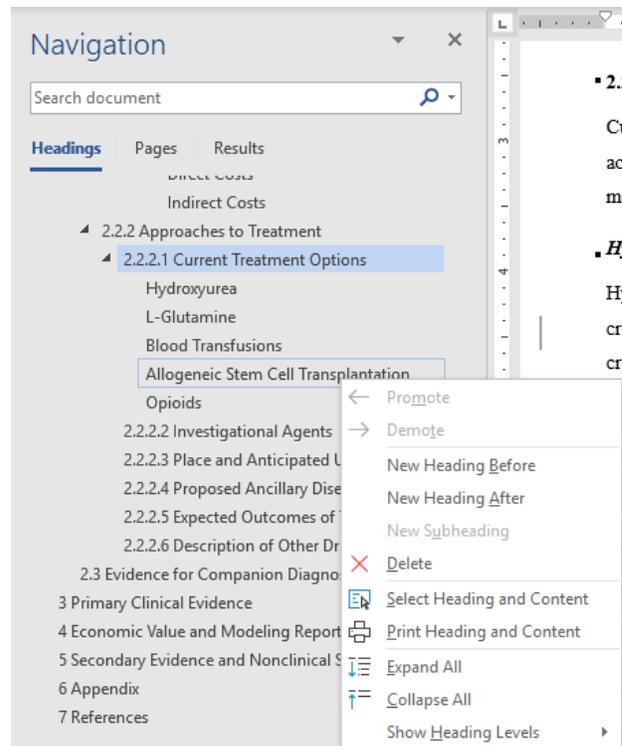
2. Drag and drop to the new location.

You can also add headings before and after other headings within the **Navigation** pane to allow you to plan for the future of the doc.

Here's how you do it:

1. Right-click on a heading in the **Navigation** pane.
2. Select an option (New Heading Before or New Heading After) from the window that appears.

You can also do this in the Outline View, but since the **Navigation** pane is almost always open, it's quicker to use it than change to the Outline View.



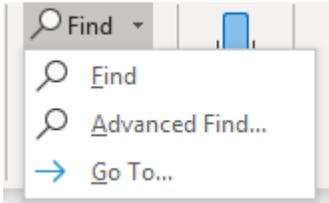
Available in Word, not PowerPoint

Find and Replace – Advanced

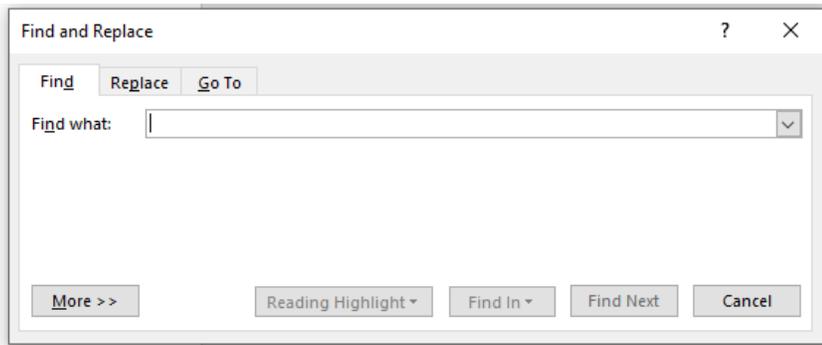
While there is much to be found in the **Navigation** pane and using the **Find** command, there are even more options in the Advanced Find and Replace window.

Available in Word, not PowerPoint

From the **Home** tab, click the arrow next to **Find**, to see the option for **Advanced Find**.

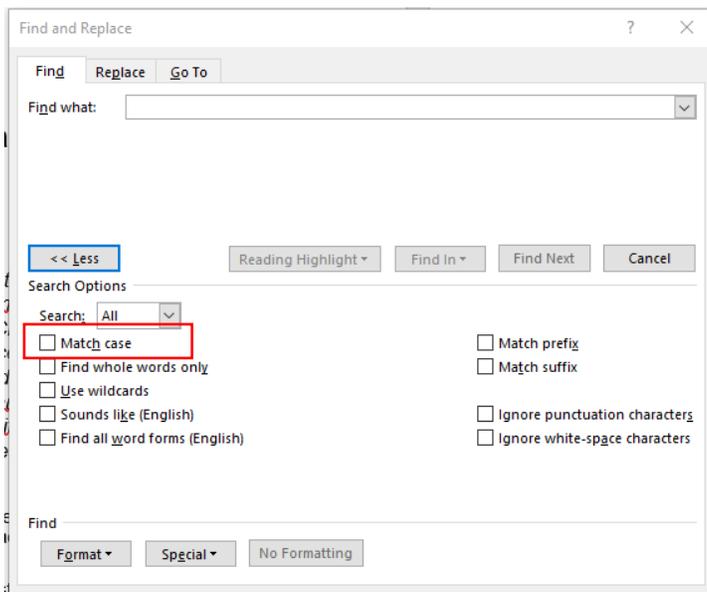


Click **Advanced Find** to access the Advanced Find window, then the **More >>** button.



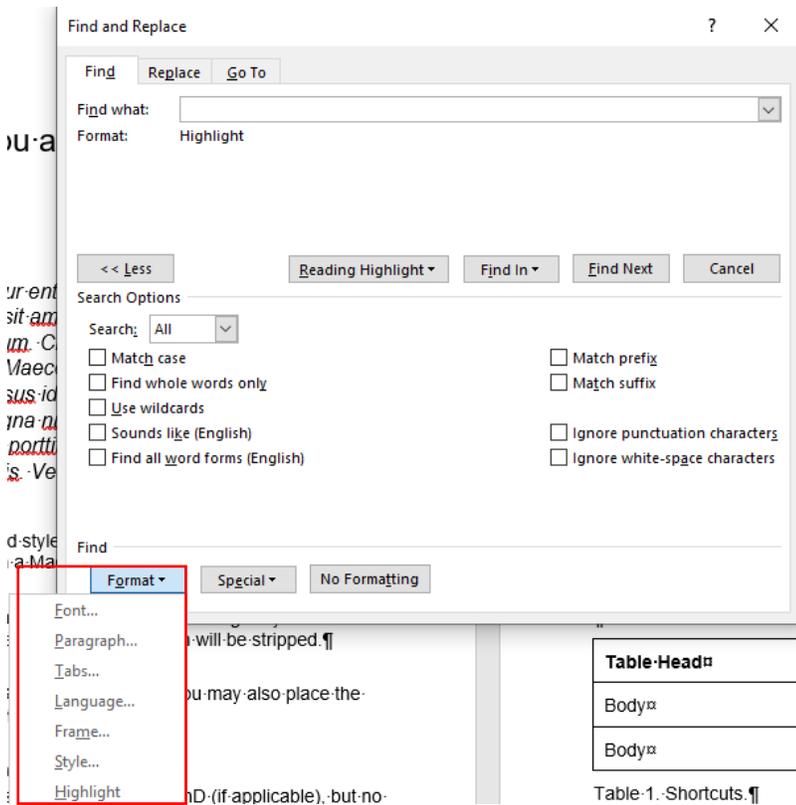
Match Case

The **Match case** option is helpful when you need to find that one instance of a word that was upper case early in the document before you figured out later in the document that the rest of the instances were NOT upper case.



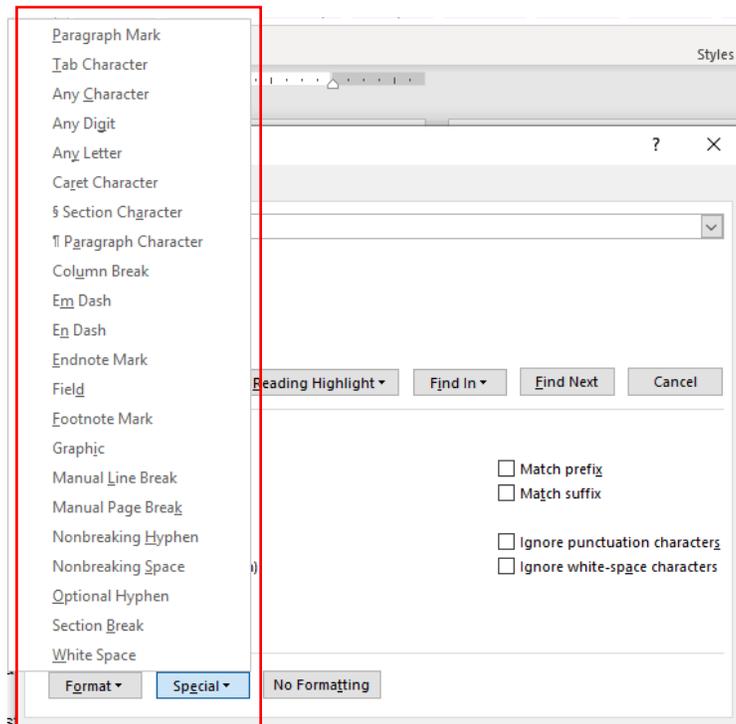
Highlight

The **Highlight** option is helpful when you have highlighted information you need to find again in a long document. Using this find to scan through the document and see the highlighted parts is quicker than just scrolling.



Special

There are many different items to be found using the **Special** button in the Advanced Find.



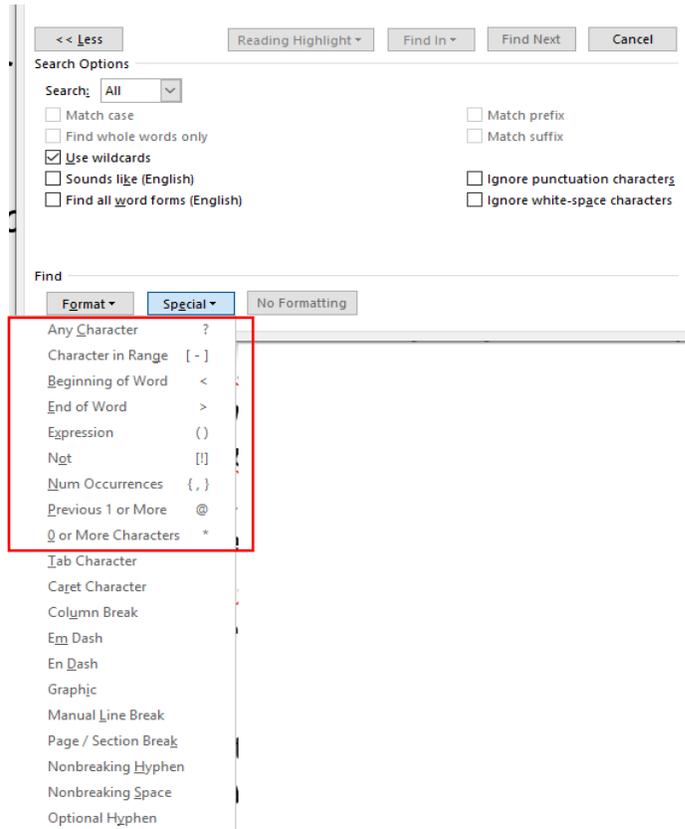
Find and Replace - Wildcards

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

Wildcard	What it Finds / What it Does
?	Any single character
[-]	Any single character in the specified range
<	The beginning of a word
>	The end of a word
()	Groups wildcards together
[!]	Any single character except those specified (ie, not)
{,}	Occurrences of the previous character
@	One or more of the previous character or expression before something else
*	Any string of characters

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.

In Advanced Find, click **Use wildcards** to see more options under the pull-down menu from the **Special** button.



The list in the table are the ones listed here; it is different than the pull-down from the **Special** button when **Use wildcards** is NOT selected.

Wildcard Ranges

In addition to wildcards for individual characters, there are wildcard ranges.

Wildcard Range	What it Represents
[0-9]	Any digit
[a-z]	Any occurrence of a lowercase letter
[A-Z]	Any occurrence of an uppercase letter
[A-z]	Any occurrence of any letter

Available in Word, not PowerPoint

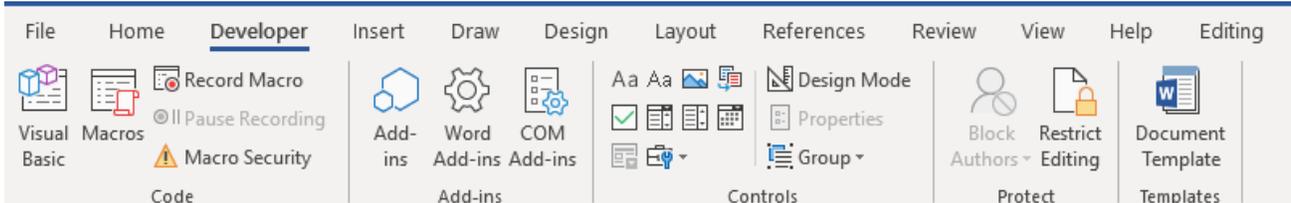
Find and Replace - Simple Macros

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

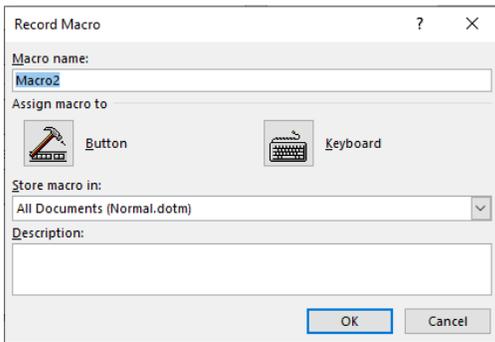
to test it for any unintended consequences. You can also use some of what you know about wildcards to make the macro more efficient and accurate.

Record a simple macro:

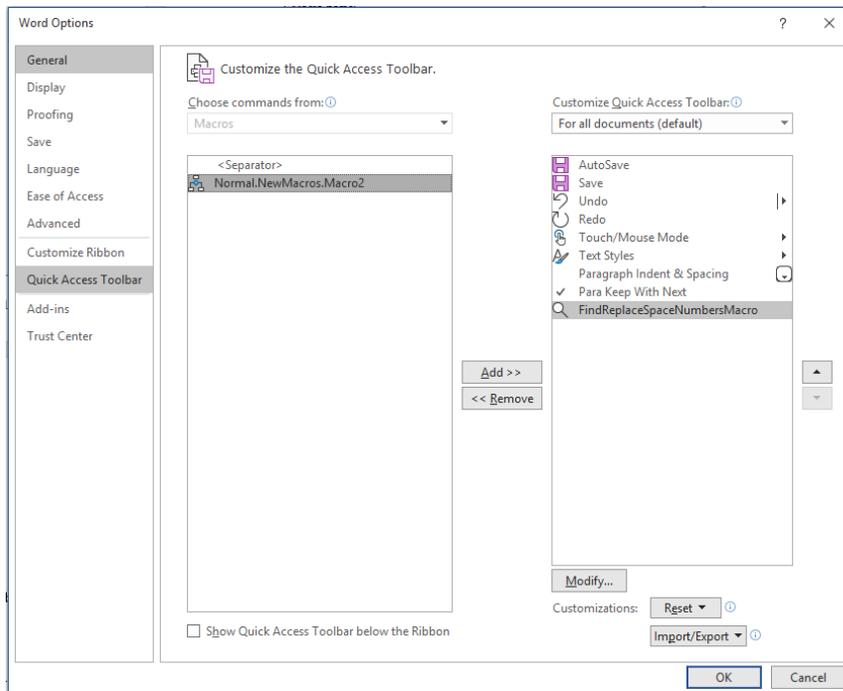
1. Click the **Developer** tab.
2. Click the **Record Macro** button.



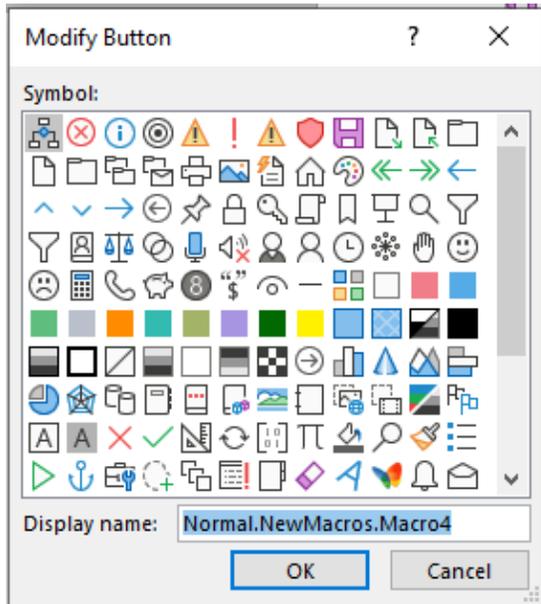
3. Give your macro a name (no spaces).



4. Click **Button**.
5. When the **Customize the Quick Access Toolbar** window displays, select the macro name you just created and 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, it's **Available in Word, not PowerPoint**. You can learn more 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>

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