

Windows Overview—What are the 5.5 things?

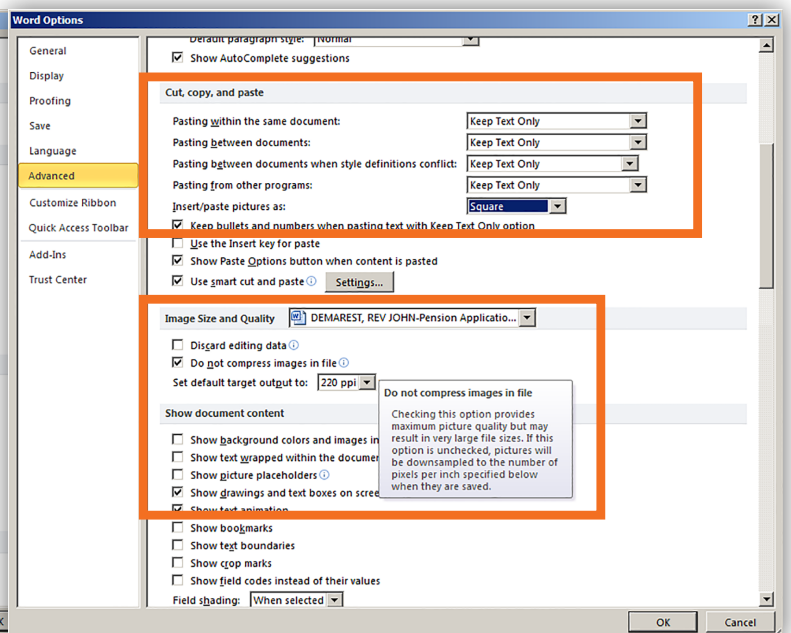
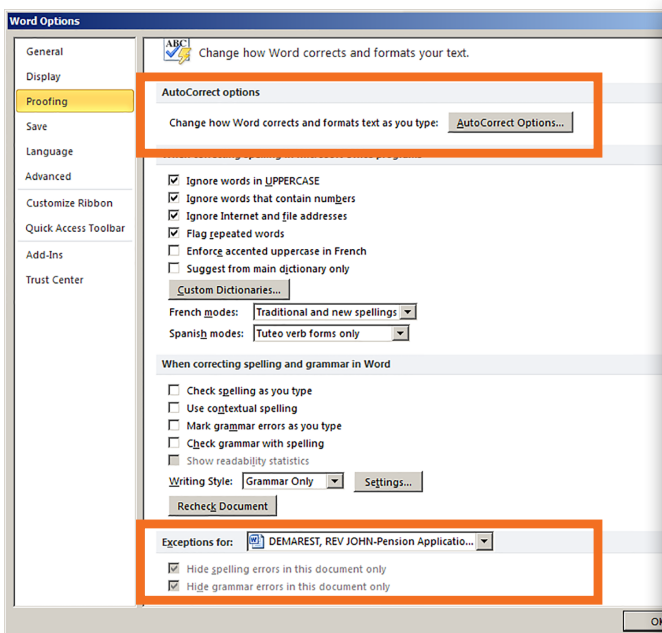
1) Use your presets—edit Word’s options to help speed your work

- **File > Info > Options**—Explore and adjust the preferences to save work as you type:
 - Hide spelling and grammar errors as you type so they don’t distract. You can always turn them on again later when you’re ready to proof and spell-check.
 - Turn off auto-correct options (I like to turn them all off so they don’t change my text—especially when I am transcribing!)
- **“Embed fonts in the file”? Don’t count on it!**
 - The “Embed” was disabled in Microsoft products after a lawsuit from Adobe.
 - For most reliable performance and consistency, use only fonts that are standard system fonts across various versions of Office, Windows, AND Mac (e.g., Garamond, Arial, Times, etc.).
- **Advanced and Important Settings**
 - **Copy, Cut, and Paste:** Keep the formatting in your document pristine—change the defaults to **Keep Text Only** or use **Paste Special > Unformatted** when pasting text

- **Copy, Cut, and Paste:** Insert pictures as **Square** for easier insertion into text
- **Image Size and Quality:** Make sure to change this setting to **“Do not compress images in this file”** and set the resolution to the highest **BEFORE** pasting any images into the file!

2) Master margins, headers, and footers and the different types of breaks

- **Header Area**
 - Double click on the top margin to access the Header settings or select **Insert > Header**. Once the header is open, a special tab, **Header & Footer Tools**, will appear.
 - Anything in the **Header** area, e.g., text, a logo, an address, an image, or a document title, has the potential to appear on every page of the document. This will look grayed-out on-screen but will print and PDF fine.
 - When you start a new Section in a document (**Page Layout > Section Break** or **Insert > Page Break**) the header will expect to be different than the Section before it. To avoid this, use Page Breaks instead of Section Breaks.



5.5 THINGS EVERY GENEALOGIST SHOULD KNOW HOW TO DO IN WORD

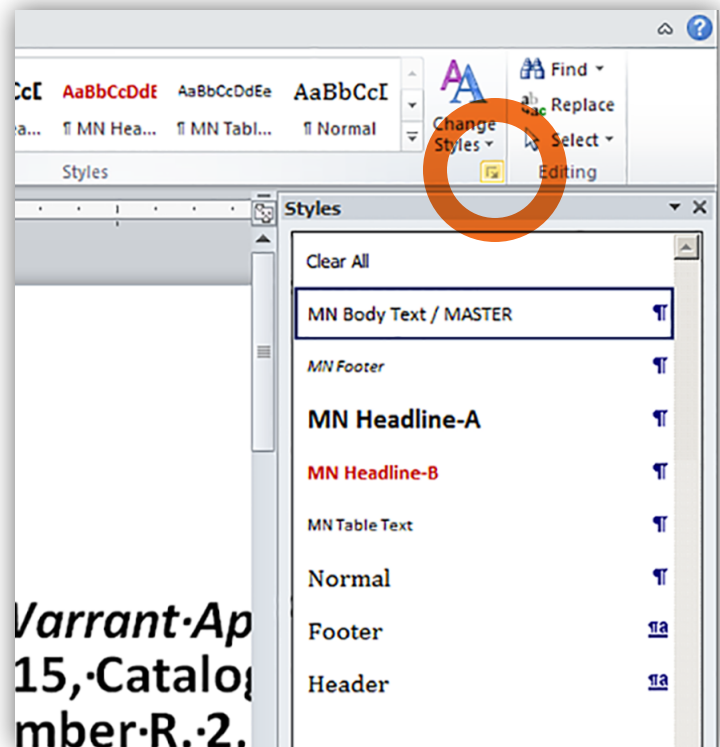
▪ Footer Area

- Double click on the bottom margin to access the Footer settings or select **Insert > Footer**. Once the footer is open, a special tab, **Header & Footer Tools**, will appear.
- Highly recommend using “Page X of Y” format for all documents and contracts.
- Anything in the **Footer** area, e.g., text, a logo, page numbers, has the potential to appear on every page of the document.
- Use the pre-formatted options and then change the type settings to suit your style. You can even make and apply **Custom Paragraph Styles** to headers and footers.
- Note that, like headers, footers may disappear when you insert a Section Break. Use Page breaks whenever you can to avoid this.

3) Employ the correct character/punctuation (See table)

4) Create custom Paragraph and Character text styles (and avoid the built-in ones)

- Access the **Custom Styles Panel** under the **Home > Styles** tab. It’s the super-tiny arrow-button in the lower-right corner of the Styles section, or under the Change Styles drop-down. Or select **Alt+Control+Shift+S**.
- **Custom Styles** are user-defined styles. Create them, name them, and apply them to the text in your document. Click on the text and then click on the style (in the palette) you want to apply.
- Once applied to text, you can modify the Style—and all the text linked to that style will follow the changes you make to the Style.
- To avoid re-flows on different computers, in **Style Based On**, select **(No Style)**. This de-links it from the “Normal” style, which may differ from computer to computer.
- In the **Modify Style** panel, the **Format** drop-down allows you to customize all types of settings.
- Paragraph line spacing should be set to single or a multiplier. Do not set the line spacing to less than single spacing.



- In the Paragraph setting, avoid Space Before, use Space After instead. Use Space Before sparingly as it may cause layout problems.

5) Templates—Save your most used files and documents as template files to help speed your work.

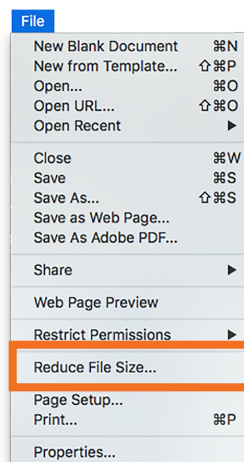
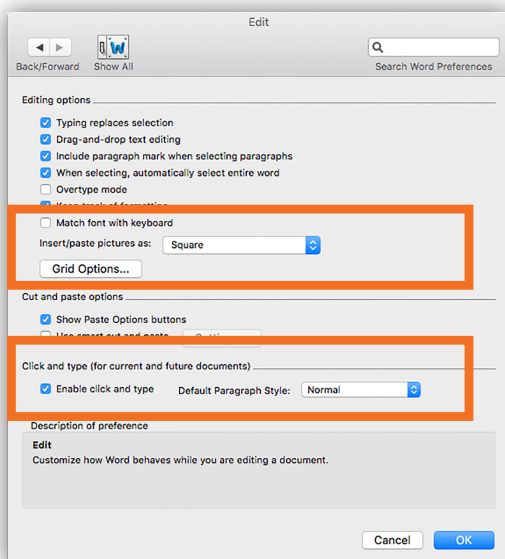
- Work your document into a usable format that you like and that meets the needs of the document (form follows function).
- Delete the “unique” elements of the document.
- ‘Save As’ a template file (.dot or .dotx)—either into the template folder, a specific folder, or to your Desktop.
- When you need to make a new file, use the template. It will prompt you to ‘Save As’ to a new file so you won’t overwrite the template.
- If you need to make changes to your template, open it, modify it, and then save as a template again—overwriting the old one.

5.5) Explore footnotes, endnotes, and citation helpers (See article)

Mac Overview—What are the 5.5 things?

1) Use your presets—edit Word's options to help speed your work

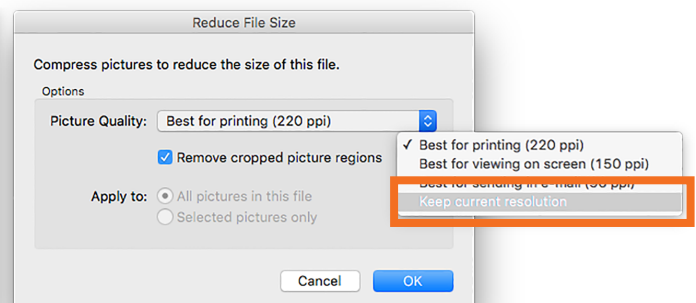
- **Word > Preferences**—Explore and adjust the preferences to save work as you type. Most options will be under **Spelling and Grammar** and **Auto-Correct** panels:
 - Hide spelling and grammar errors as you type so they don't distract. You can always turn them on again later when you're ready to proof and spell-check.
 - Turn off auto-correct options (I like to turn them all off so they don't change my text—especially when I am transcribing!)
- **“Embed fonts in the file”?** Don't count on it!
 - The “Embed” was disabled in Microsoft products after a lawsuit from Adobe.
 - For most reliable performance and consistency, use only fonts that are standard system fonts across various versions of Office, Windows, AND Mac (e.g., Garamond, Arial, Times, etc.).
- **Preferences > Edit** (below-left)
 - Keep the formatting in your document pristine—change the defaults to **Keep Text Only** or use **Paste Special > Unformatted** when pasting text
 - Insert pictures as **Square** for easier insertion into text



- **Preserve Image Quality** (below-right)
 - Make sure to change this setting to **“Do not compress images in this file”** and set the resolution to the highest **BEFORE** pasting any images into the file! Change settings at **File > Reduce File Size**, and change the setting to **Do Not Compress**.

2) Master margins, headers, and footers and the different types of breaks

- **Header Area**
 - Double click on the top margin to access the Header settings or select **Document Elements > Header**. Once the header is open, a special tab, **Header & Footer Tools**, will appear.
 - Anything in the **Header** area, e.g., text, a logo, an address, an image, or a document title, has the potential to appear on every page of the document. This will look grayed-out on-screen but will print and PDF fine.
 - When insert a Section Break in a document (**Layout > Break**) the header will expect to be different than the Section before it. To avoid this, use **Page Breaks** instead of **Section Breaks**.
- **Footer Area**
 - Double click on the bottom margin to access the Footer settings or select **Document Elements > Footer**. Once the footer is open, a special tab, **Header & Footer Tools**, will appear.



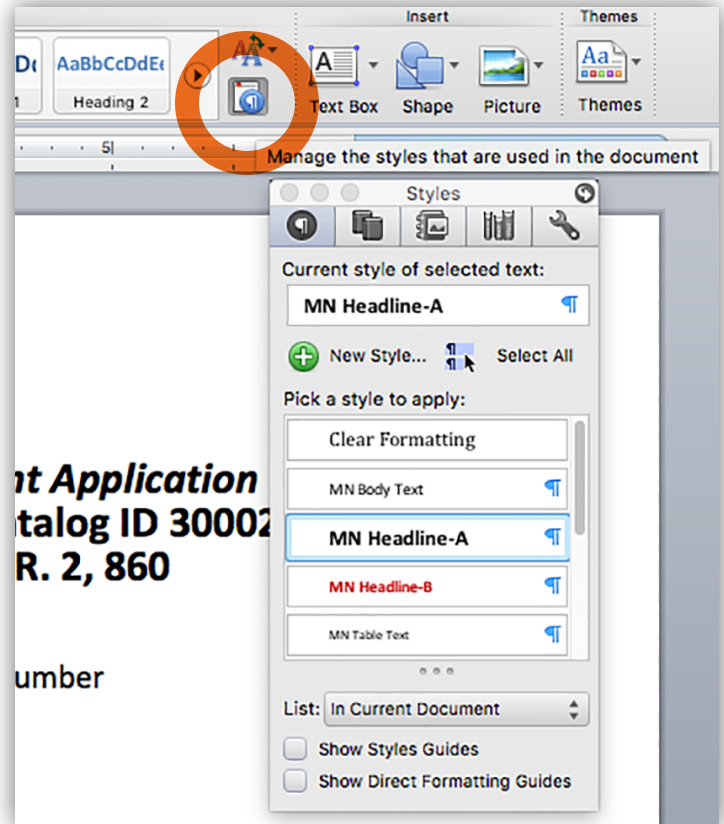
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4) Create custom Paragraph and Character text styles (and avoid the built-in ones)

- Access the **Custom Styles Panel** under the **Home > Styles** tab. It's the tiny paragraph button at the lower-right of the Styles section, under the **Change Styles** drop-down. Change the view to “**In Current Document**” (optional). [In Office 365 it's now a large button—yay!]
- **Custom Styles** are user-defined styles. Create them, name them, and apply them to the text in your document. Click on the text and then click on the style (in the palette) you want to apply.
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




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5.5) Explore footnotes, endnotes, and citation helpers

- **Document Elements Tab** (See article)

Punctuation—The Invisibles

		Mac	PC	What is it
	Paragraph Return Hard-Return	Return Key	Return Key	Separates paragraphs from one another and allows for a new paragraph style to be applied.
	Shift+Return Soft-Return	Shift+ Return Key	Shift+ Return Key	Line breaks within a paragraph—without signaling the start of a new paragraph. Especially useful in transcriptions where you record the lines as faithful to the original breaks as possible.
	Tab Stops	Tab Key	Tab Key	Large spaces between words or representation of gaps in document transcription. Note that the basic tab stops are set at 1/2 of an inch—you should adjust where the tab stops fall to use as FEW tabs as possible. Adjust the position of the tab stop instead of adding more tab stops.
	Word Space	Space Bar	Space Bar	Space between words AND sentences—one space only.
	En Space	Command+ Shift+ N	(Use Symbol Palette)	The width of an upper-case N character. Traditionally used as the space between sentences, now used for special spacing needs.
	Em Space	Command+ Shift+ M	(Use Symbol Palette)	The width equal to the height of an upper-case M character. Used for special spacing needs.

Punctuation—Specialty Punctuation

		Mac	PC	What is it	Example of use
-	Hyphen	-	-	Syllabic breaks in words—continuation of a word over a line break.	The application was continuously made...
—	En Dash	Option+ -	Alt+ Control + -	Longer than a hyphen. Used to make compound words or names or to separate dates.	The Smith–Adams family... ...community, 1609–1624.
—	Em Dash	Option+ Shift+ -	Alt+ Control+ Shift+ -	Longer than an En Dash. Used to separate thoughts—can take the place of commas, parentheses, or colons.	Upon discovering the errors—all 124 of them—the publisher immediately recalled the books.
“”	Double Quotes	Shift+ “	Shift+ “	Offsets a quotation from narrative.	She said, “I love writing.”
‘’	Single Quotes	‘	‘	Used to set off a term or quotation inside of a quotation.	She said “I love writing, especially when I get to write ‘free form’.”
’	Single Closing Quote	Option+ Shift+ }	Alt+ Control+ }	Apostrophe with the open side facing left. Note that this is NOT the same as an automatic apostrophe and is a special character.	It was in the ’70s. (Note that adding a possessive apostrophe, e.g., “70’s” makes it possessive, not plural.)
[]	Brackets	[]	[]	In transcription, used to separate the transcribed data from unclear or segments or to make notations about the condition of the original text.	...it was up to [him] to see that the deeds w [page torn, illegible]

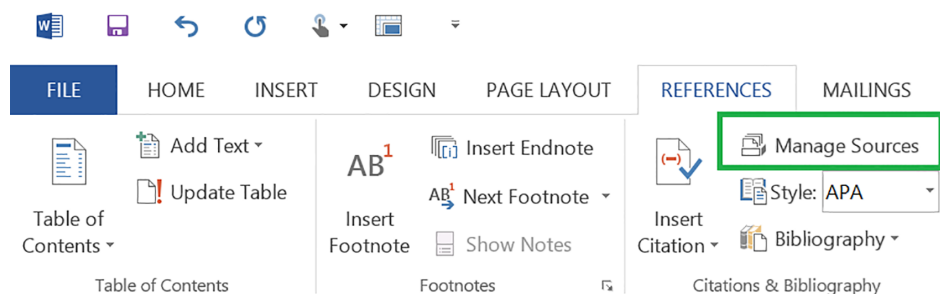
How to use Microsoft Word's Works Cited Tools: Sources, Footnotes, and More

Anthony Domanico | PCWorld Sep 25, 2014

Adding references

When you choose to include a source, such as a journal article, book, or web site in your paper, you'll want to add that source to your references. Word's Manage Sources, found in the Citations & Bibliography section of the References ribbon, is your one-stop-shop for managing your references. To add a source, click the Manage Sources button, then click New in the resulting pop-up menu.

Word makes it easy for you to manage all of your references with the Manage Sources tool.



In the new reference section, you'll first need to choose the type of source you're adding from the drop-down menu. Depending on the type of source you choose, Word will give you line items for all the fields you'll need to appropriately cite your reference, and it'll do it in APA or MLA style. Once you've entered information into all of the appropriate sections, click okay and either get back to your paper or add more sources.

 A screenshot of the 'Create Source' dialog box in Microsoft Word. The 'Type of Source' dropdown menu is set to 'Book'. Below this, the 'Bibliography Fields for APA' section is active, showing input fields for Author, Title, Year, City, and Publisher. There is a checkbox for 'Corporate Author' and an 'Edit' button next to the Author field. At the bottom, there is a checkbox for 'Show All Bibliography Fields', a 'Tag name' field with 'Placeholder1' entered, and 'OK' and 'Cancel' buttons.

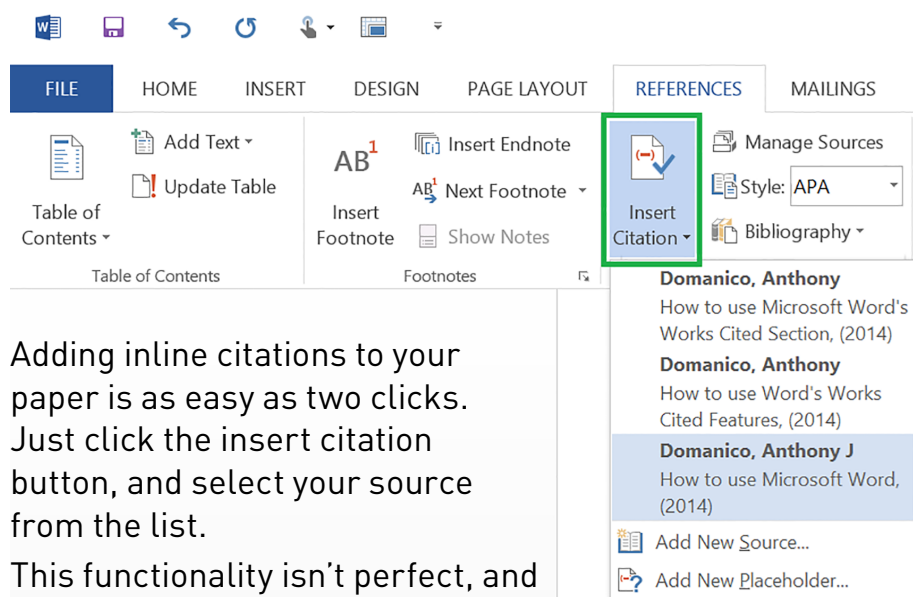
The Manage Sources tool pulls in the appropriate fields to fill in for each type of source available. The book source, for example, yields fields for Author, Title, Year, City and Publisher.

Adding inline citations

As you use material within the body of your paper, you'll need to add inline citations to properly attribute your material to the original source. Assuming you've added your references, simply point your cursor to the location you'd like the footnote to go, then click on the Insert Citation button in the Citations & Bibliography section of the References ribbon. In the subsequent dropdown, click on the source you're referencing, and Word will automatically enter the inline citation at that location.

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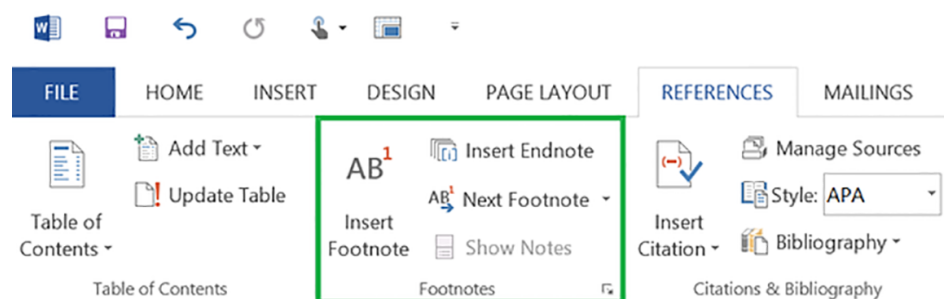
Adding inline citations to your paper is as easy as two clicks. Just click the insert citation button, and select your source from the list.

This functionality isn't perfect, and it's important to double check your in-line citations to ensure they're compliant with the applicable style guide. But 99 percent (or more) of the time, Word gets the job done flawlessly.

Adding footnotes and endnotes

Some assignments will require you to add footnotes or endnotes to your paper, and it's important to know the difference between the two if you're going to use them appropriately. Footnotes are notes that occur at the end of each individual page within your paper, while endnotes appear only on the final page and are often used in lieu of a references page.

Regardless of whether you use footnotes or endnotes, Word makes it incredibly easy to add these to your paper. You can add footnotes or endnotes in the Footnotes section in the References ribbon, but be sure to place your cursor where you'd like the superscripted number referencing the footnote to appear before clicking on the tools.



Everything you need to add footnotes and endnotes to your paper can be found in the Footnotes section of the References tab.

For footnotes, click on the Insert Footnote button, then type in either your reference or add notes and supporting materials. To navigate between footnotes within your paper, simply click on the Next Footnote button. To add endnotes, click on the Insert Endnote button and add your notes and/or citations. Here's what your footnotes will look like within your Word document.

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For either option, you can also use the Insert Citation button in the Citations & Bibliography section (covered in the previous section) to add appropriate references to your footnote or endnote.

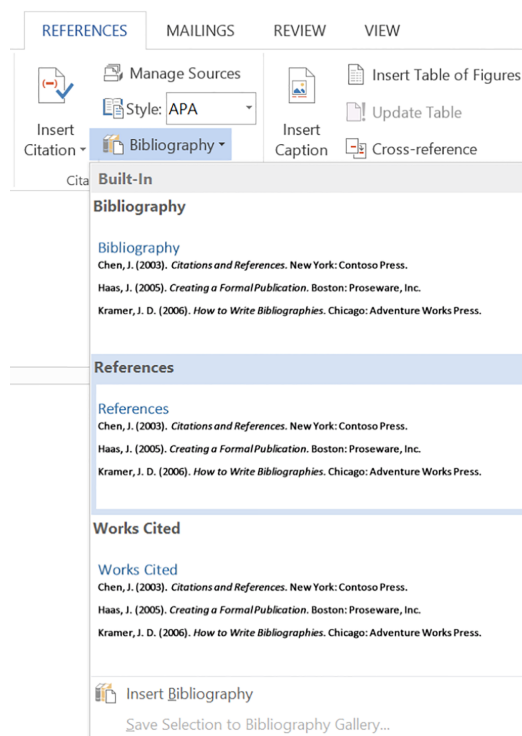
Insert a bibliography

Before Word 2007 added a References section, adding a bibliography was an arduous, manual task that was often one of the worst parts of completing a research paper. Now, adding a bibliography to your paper is as simple as two mouse clicks.

The bibliography automatically adapts to the style guide you choose in the Style dropdown, and you can set the title to bibliography, references, or works cited.

In the Citations & Bibliography section of the References ribbon, click on the Bibliography drop down menu to pull up the three options for a bibliography. Stylistically, all three options look identical with the exception of the heading, since different fields of study can't seem to agree on what to call the bibliography.

Depending on the requirements for your particular paper, choose either the bibliography, references, or works cited type of bibliography to add it to the end of your paper. Each option will be perfectly referenced according to the style guide you choose in the style drop-down menu.



If you add references into your paper after you insert the bibliography, click on the Update Citations & Bibliography button at the top of the References page. The button will appear once you mouse over the word "References." Reselecting the Style option will also refresh your bibliography's sources.

The only other thing you may need to do is insert a page break immediately before the

references to ensure it's always on the last page of your document. You can do this by clicking Page Break in the Pages section of the Insert ribbon.

www.pcworld.com/article/2687533/how-to-use-microsoft-words-works-cited-tools-sources-footnotes-and-more.html