Word Processing Tricks for Genealogical Publishing
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NOTE: This is a hands-on workshop using Microsoft Word 2010 or 2011(Mac). This material is just an outline of the material and exercises covered. Menus and tabs in blue are PC and green are the Mac.

Working with a word processor to write your genealogy can be frustrating at times. To make an attractive newsletter or book, genealogists want to insert images and summarizing tables as well as produce Table of Contents and Indices. Using a few tricks in your text can make the job much easier.

Overall
To assist in making the many choices of how to format your family information, Patricia Law Hatcher’s “Producing a Quality Family History” [1] is recommended. She has invaluable checklists at the end of each chapter and leads you through the maze of choices in type fonts, styles, editing your book, indexes, and much more.

Working with Images
1. Guidelines for Scanning Documents and Photos
   ➔ TIP: 300 DPI TIFF or JPEG files are needed for printed documents.
2. Cropping and Adjusting Photos Inside Word
   Photographs are rarely the exact right size to fit into your Word document. Cropping can eliminate some of the unwanted parts of the image and focus attention on your subject.
   ➔ TIP: One way to manage this process is to have all the photos you will use in your document in one directory. If you have a large number of photos separate them by chapter.
   ➔ TIP: As you select your images be thinking about what is the important part of the image and whether adding a border, enhancing it or softening the edges is desired.
   ➔ TIP: Even after you crop a picture, the cropped parts remain in the document file.
   ☒ TRICK: You can remove the portion of the images cropped by right clicking on the image and selecting compress.
   ☒ TRICK: If your document has a graphic on the first page, then turn off preview of the file to make it smaller.
3. Placement of Images in Text
   The placement of images within the text is controlled from the Picture Tools menu. Format tab is selected then the Wrap Text -> More Layout Options to see examples [Format Picture tab in the Arrange group]. Text can be inline, square, tight, behind text, and in front of the text. The default is ‘inline with text’ which is NOT what most people would select.
   ➔ TIP: Place images after a section or chapter is completed. It’s easier to control wrapping of the text and other consequences of inserting the image within a bounded section.
   ☒ TRICK: There is more than one way to access the picture tools. Both the Format Picture tab and the Insert menu -> Picture toolbar can do the same editing functions.
   ☒ TRICK: The picture toolbar (dog behind lines) can be added to the quick access toolbar [docked in the toolbar in the ribbon].

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4. Continuous Section Breaks to Control Formatting
   On the Page Layout tab, in the Page Setup group, click Breaks and select the type of break. The Continuous Section Break starts a new section right where your cursor is located without changing the page numbering or inserting a new page. Within each section you can alter margins, paper orientation (landscape or portrait), borders, and columns without affecting other sections of the larger document. Removing section breaks is as easy as placing the cursor after the break and then deleting the ‘character’ in front it.

➤ TIP: To make the section breaks visible click on the Paragraph symbol in the paragraph group of the ribbon.

☑ TRICK: Use continuous section breaks to change the page numbers format in a section so they are different from the rest of the document such as in the Preface.

5. Multiple Columns
   Select the text you want to format in columns, or put your cursor where you want columns to begin. On the Page Layout tab [Layout tab, in the Text Layout group], click Columns. Click More Columns at the bottom to see all the choices. Click the number of columns that you want. To revert back to one column at any time just select Layout tab, in the Text Layout group, click Columns and pick one column from the choices.

➤ TIP: Use continuous section breaks to prevent the entire document from becoming multiple columns.

☑ TRICK: Use multiple columns and smaller fonts on the Index to minimize the number of pages used.

Working with Tables
1. Inserting Tables
   On the Insert Menu, Tables group select Table brings up the options for headers, lines around the table, etc. Clicking on Insert Table [New] brings up menu to create various size tables. You can also customize the table’s appearance by right clicking with the table selected.

➤ TIP: With the table select right clicking and selecting Table properties shows the widest choice of options.

2. Adding Table Rows and Columns
   To add more rows highlight one row and right click then select Insert Row. It works the same way with columns with one column selected.

➤ TIP: Select the row below the location for the new row when adding. Select the column to the right of where you want a column inserted.

➤ TIP: Tables that should be separated sometimes become attached. These can be separated.

3. Converting Text to a Table and vice-versa
   Anytime you have a consistent delimiter between items you can convert text to a table using the Table Menu and select Text to Table.

☑ TRICK: Genealogical information in tabular form can be copied and pasted into a document from web pages. This causes a loss of formatting many times. Simply take the items, insert commas between the words or phrases, and then convert to a table in your document.

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Inserting Table of Contents  

Table of Contents (TOC) can be generated from outline levels, styles, or from entries that you mark yourself. Easiest is to generate them from the styles such as Heading 1, Heading 2, etc. If you are already going to use a style sheet to help with formatting why not use that to generate each entry? Where you want a TOC click References [Insert] from the menu then Index and Tables and select Table of Contents tab. Click ok and watch the magic.

► TIP: The format of the entry is selectable using templates that are furnished with Word. Using the Classic format is always a good default choice.

► TIP: Clicking on Automatic Table [Modify] after you select Table of Contents can alter the number of TOC styles that are used to generate the TOC.

☑ TRICK: If you have generated the TOC and then add more information causing the page numbering to change, then hover over the TOC, right click and select Update Fields. This will generate a dialog box asking if you need to regenerate the page number or the entire field. Choose to regenerate the entire TOC if you have changed anything on a heading level.

☑ TRICK: Inserting a Continuous Section Break before and after the TOC can prevent unexpected formatting changes to the cover page.

Introduction to Generating an Index  

Generating Indices is similar to using and generating the TOC with the exception that the entries have to be constructed. Software like The Master Genealogist [9] generates these index entries automatically. To create an Index entry, highlight the text to index and mark it (varies by version). This

► TIP: Several entries can be entered at the same time such as on a marriage and entry for both a husband and wife.

☑ TRICK: Creating Multiple Indexes for People, Places, and Marriages can be done by using ‘People’, ‘Places’, and ‘Marriages’ as the main entry and the item as the sub-entry.

Bibliography


