Microsoft Word

Level 3: Word for Theses for Mac – O365

Practical workbook

Introduction

Is this guide for me?

Microsoft Word Level 3: Word for theses for Mac is designed for users who want to learn how to use Word efficiently to write a thesis or similar long document on a Mac. A little time invested before you start to write can save a lot of time in the long run. Tables of contents, cross references and other features are also much easier to use if created properly in the first place.

This practical workbook is intended to be used for self-paced learning or as a self-help guide.

What will I learn?

On completing this course you should be able to:

- create and use templates in your documents
- apply, modify and create styles
- change styles and save these changes to the template
- apply an updated template to a document and attach a different template
- insert pictures and add captions to pictures and tables
- apply and use various types of document breaks
- insert one Word file into another
- insert different headers and footers in different parts of your document
- create a table of contents and list of figures/tables
- count the number of words in a document
- create and delete cross-references
- use the techniques learnt in previous tasks to create and use a new dissertation template

Prerequisites

Before undertaking this course, you should be competent in the following Word skills: formatting; page setup; print preview and print; bullets and numbering; headers, footers and page numbers; tables.

Files

If you are attending a taught version of this course the files will be provided for you. Working elsewhere, visit http://www.bris.ac.uk/it-services/learning

Where can I find out more?

In addition to this workbook we have also created an online guide: https://www.bris.ac.uk/it-services/learning/skills/word_for_theses_overview.html

Although based on the Windows version of Word, this is designed to give you a brief overview of the techniques and skills you will need to effectively write and manage your theses. If you require further information, or help, most subjects in the guide are supported by an online video tutorial. We also strongly recommend that you make use of **Lynda.com** to find further high-quality training materials on this subject. Visit http://www.bristol.ac.uk/it-services/learning/lynda to find out more.

Contents

1 Templates

Objectives

At the end of this task you will be able to:

• Create a new template
• Save and Edit a template
• Create a new document from your template

Comments

In Microsoft Word, all documents are based on a template, even if it is the blank *Normal* template. You can use one of the many templates provided by Word to create new documents, or you can create your own custom templates to use – the choice is yours.

1.1 Understanding Templates

Although you can design and create every new document from scratch, Word provides many templates which you can use to create your new document. Because a template contains the settings required to create a certain type of document (such as a report or letter), this means that you can spend more time creating the content and spend less time on its appearance.

1.1.1 What settings can be stored in a template?

Document templates store:

• Styles that are used for the various paragraphs
• Formatting information such as page size and orientation, margin, headers and footers
• Boilerplate text that can be used for the document, such as company name and address, greetings, salutations, and so on. This text is contained in content controls
• Macros that can be used in the document, such as ones providing automated data entry for letters and faxes
• Building blocks that can be used to insert common words, phrases or pictures into a document
• Themes which comprise theme colours, theme fonts (such as heading and body text fonts) and effects (which apply a pre-chosen set of fills and shading for your inserted charts, objects, flow charts and so on).

1.1.2 How are templates used?

When you create a new document, you must base it on a template. You can use the default document template (Normal.dotm) by choosing to create a new blank document, you can select one of the templates that were installed by default, you can choose from thousands of Microsoft Office online templates, or you can opt for a template that you have created and saved yourself. And once chosen,

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Microsoft Word copies all text that resides in the template into the new document – this may be as little as a single paragraph mark – plus all other saved elements from the template, before it presents the document to you for editing.

1.1.3 How are templates different to normal documents?

A Word template is almost identical to a Word document except that it can contain building blocks and can be used repeatedly as the basis and starting point for any number of new documents.

You can differentiate templates and documents by their filenames. Word documents use the file extension *.docx* while templates, by default, include the file extension *.dotx*. Templates can also include the file extension *.dotm*. Templates with the file extension *.dotm* support VBA macro code while templates with the file extension *.dotx* cannot store VBA macro code.

1.1.4 Where are templates located?

Unless you select a different location, templates are saved in **/Users/username/Library/Group Containers/UBF8T346G9.Office/User Content/Templates**.

To change where Word automatically saves your templates, on the Word menu, click **Preferences**, and then under **Personal Settings**, click **File Locations**. Under **File Locations**, select **User templates** from the list, and then click **Modify**. Type the new folder and path you want to use, and Word will save any new templates in that folder.

1.2   Creating a Template from Scratch

To create a new template, you must base it on an existing document or an existing template. To create a new template from scratch, base it on the ***Blank document*** template – ***Normal.dotx***. You can add new styles, standard text, building blocks and so on, then save it as a new template (with a new name), available for later use. In this task we create a **Letter template** as an example.

Activity

Try This Yourself:

First, have Word open…

• Click **File** menu and select **New from Template** to see template options
• Under Featured, double-click on **Blank document**. We will use this to create a letter template.
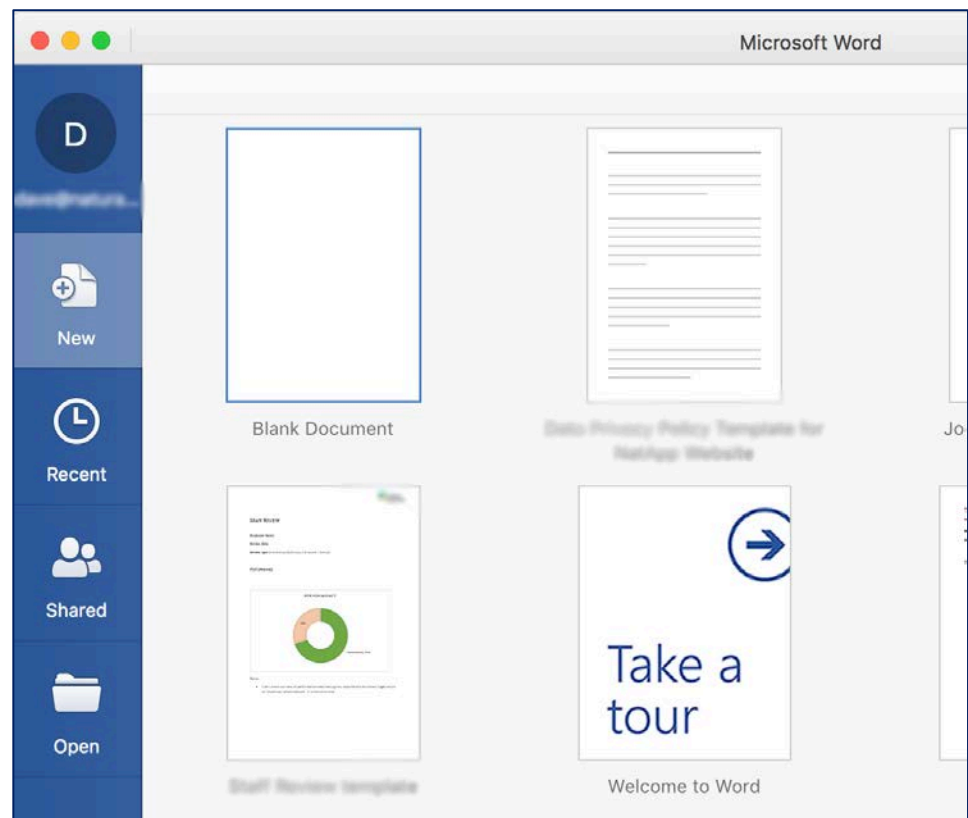
• Turn on the **Show/Hide** button in the **Home** tab > **Paragraph** group, to see paragraph marks and other hidden formatting.

- Type an address, pressing the **Enter** key after each line.
- With the address still selected, click Align Text Right button (**Home** tab > **Paragraph** group)
- Now insert a date. Start a new line and left-align the cursor and go to **Insert > Date and Time** (you'll find the icon towards the right-hand side of the ribbon). Choose a date format, tick **Update Automatically**, OK.

This adds it as a field which will update when the file is opened or printed. A field appears grey when hovered over.
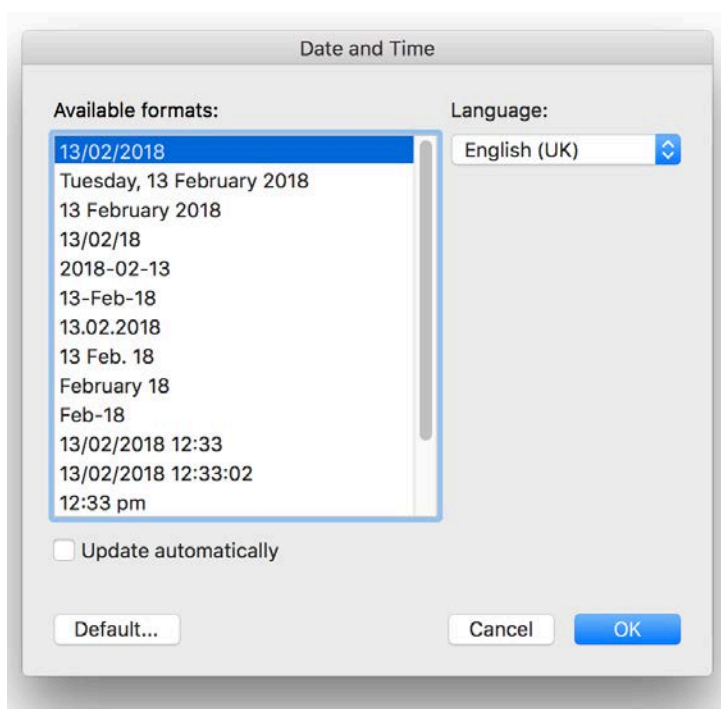
- Below this line, type **Dear** and a space.
- Go to **File > Save as Template**...

This automatically sets the correct file extension for a standard Word template and directs you to the default folder for templates.

Call your file *Letter*. Click [**Save**].

Check that the title bar shows ***Letter.dotx***, then close your new template.

1.3   Using a Custom Template

Once you have created a custom template you can use it to create new documents based on it. Any text, styles and formatting that you had included in the template will appear in the new document, ready for you to modify and/or add to. By using custom templates, you will be able to produce similar types of documents quickly and with a consistent appearance.

Activity

To create a new document based on your template:

• Click **File > New from Template…** to display required options
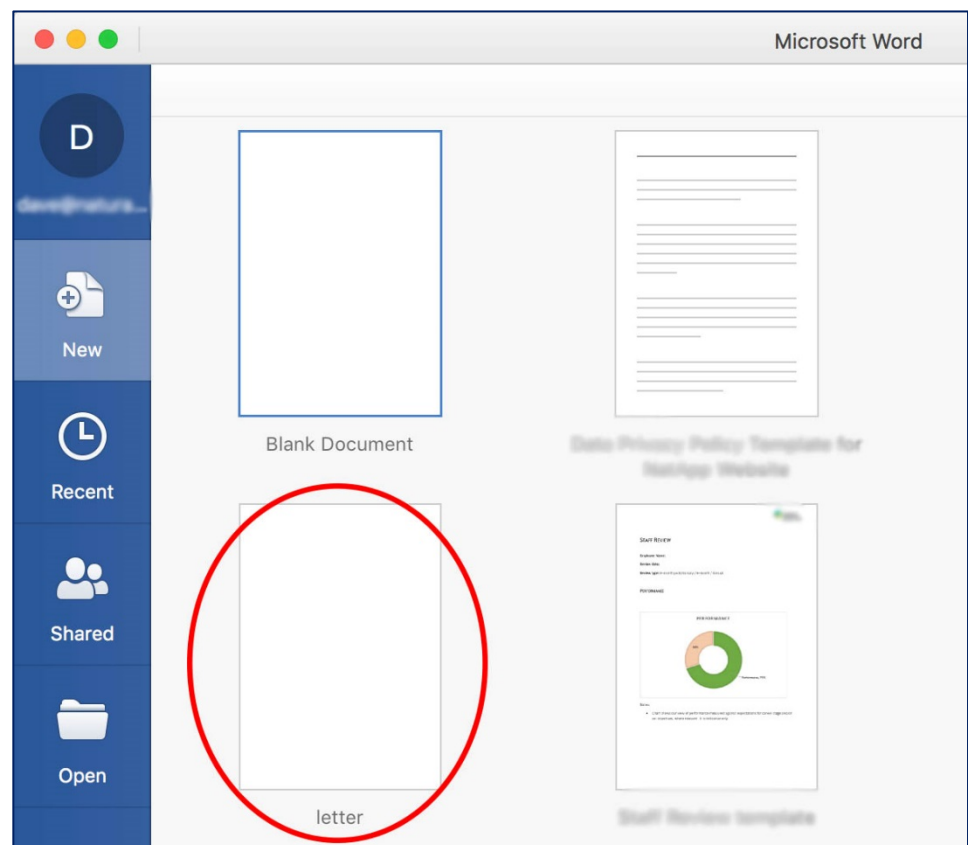
• Select your **Letter** template
• When the document appears, check the Title bar to see that it is a new document (e.g. Document2) not the template itself.
• Go to **File > Save As** and locate the Documents folder (or your preferred location).
• Give the letter an appropriate filename and check the file type is Word document (.docx).
• Click **Save**, and again check the filename in the Title bar.
• Close the file.

To note

When working with templates it is important to get into the habit of checking the file type and file location to avoid mistakes occurring.

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2 Applying Styles

Context

Word Styles can store combinations of formatting, such as font, size, alignment, indents etc. Styles ensure consistent formatting throughout the document and are quicker to use than manually applying complex formatting over and over again.

Another advantage of using Styles is the ease with which they can be modified. If you redefine a style, all paragraphs using that style in the document will be reformatted automatically.

Styles can also be used as the basis for automatically creating a Table of Contents, and can be helpful in navigating around a long document.

Objectives

In this session you will:

- gain an understanding of styles
- learn how to apply styles to paragraphs
- learn how to apply Quick styles to text
- learn how to change the Style Set
- gain an understanding of how to select all instances of a style and how to update a style.

Context

Understanding Styles

Documents should not only provide valuable and accurate information, but should also look clear and well-presented. To help with this, Microsoft Word lets you use *Styles* − either the predefined Styles offered by Microsoft, or Styles that you have created yourself − to help format your documents consistently and efficiently.

What Is a Style?

A *style* is a set of character and paragraph formatting attributes, grouped together under one name. For example, you may want all the department names mentioned in your document to appear in Garamond 16 point, bold. Rather than hand-formatting each department name with the same three settings, you can define a new style containing all these settings, then apply it to each piece of selected text.

In addition to defining your own styles, Microsoft offers a large number of ready-made styles which you can use to apply formatting. To ensure some of the common styles are easily accessible, related *styles* are grouped into *style sets which are now found under the Design tab.* (A *Style set* is a collection of the main styles that may be needed for a document − such as different *heading levels* and *emphasis* styles – which have been designed to work well together in one document.)

Using *styles* consistently provides two benefits. First, it ensures that all similar items in a document are formatted in the same way. Second, if you need to change the appearance of a particular style, you can do so very easily, and everything formatted with that style will change immediately throughout the entire document.

Paragraph versus Character Styles

Paragraph styles control all of the characteristics of a paragraph, such as alignment, spacing and all other settings that are included in the *Paragraph* dialog box. (You can open the *Paragraph* dialog box from the *Home* or *Page Layout* tabs.) Paragraph styles can also determine bullets and numbering, borders and shading, and tab settings. They are applied to the whole paragraph where the cursor is.

Paragraph styles also define the default character formatting for all characters within the paragraph. For example, you might define a new paragraph style called *Note* that specifies left-aligned paragraphs with 12 point spacing before, and with Calibri 12 point, bold, red characters. All text in a *Note* paragraph will appear as specified, unless you hand-format any text or apply another character style to it.

Character styles are similar to paragraph styles, but they only specify character formatting. This includes the font, font size, style, colour and other settings that are included in the *Font* dialog box. (You can open the *Font* dialog box from the *Home* tab.) They are just applied to a selected word, phrase or block of text.

Linked Styles

Unlike the Windows version of Word there is no Linked Style in the Mac version. However, Paragraph styles function in the same way that Linked Styles do in the Windows version. A paragraph style can be applied either as a paragraph or as a character style, depending what is selected.

You can identify the type of style by opening the *Styles* **pane** from the *Home* tab. A paragraph style includes a paragraph mark, ¶, to the right of its name, a character style includes the symbol, **a**.

The hierarchical order of Styles

With Microsoft Word, there is a strict hierarchy to character formatting as shown in the following example.

The quick brown fox jumps over the fence	The entire sentence has the **Normal** paragraph style applied to it (Arial 9 pt).
The **quick brown fox** jumps over the fence	The words 'quick brown fox' have the character style **Fox** applied to them (Britannic Bold, 10 pt, bold, purple). This style overrides the paragraph style.
The **quick *BROWN* fox** jumps over the fence	The word 'brown' has then been hand-formatted (small caps, italics, 11 pt). This manual formatting overrides both the character and paragraph styles.

Context

Applying Styles to Paragraphs

Word offers a number of in-built styles that can be used in each new document. These are accessible from the Styles group on the **Home** tab. Styles may be applied before or after text is typed.

Some examples of styles are **Normal** – this is the default style, and **Heading 1**, **Heading 2** and **Heading 3** – the styles designed to be used for 1st, 2nd and 3rd level headings.

Activity

Before starting this exercise, you MUST open the practice file
Planets.docx

1. Ensure the **Home** tab is active, then click anywhere in the heading **The Solar System**
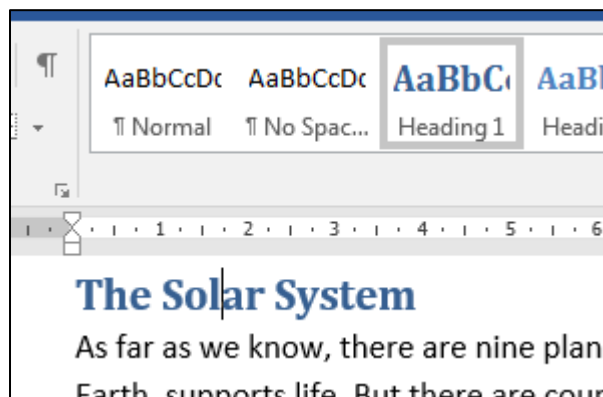
Notice that Heading 1 is selected in the Styles group on the ribbon - this is because it is the style used where the cursor is.

2. Click the **Styles Pane** button to open the Styles gallery

To note

Remember you can see what Word treats as a 'paragraph' by turning on the Show/Hide button on the Home tab/Paragraph group:

A 'paragraph' is from one paragraph mark to the next.

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3. With the cursor still in the first heading, click on the style named **Title** to apply it

4. Click anywhere in the next paragraph and select **Intense Quote** to apply this paragraph style.

Top tip

Handy to Know…

All text is based on a style. Often this is just the default **Normal** style.

Not all styles are always displayed. If you can't find a particular built-in style, go to the List: drop-down towards the bottom of the Styles window and change the **Select styles to show** field to **All styles**. Once you've found the style you're looking for, it may be easier to go back to displaying a shorter, more manageable list of styles.

Showing Style Type

There are two types of styles in Word for Mac that you will need to work with regularly: Paragraph and Character. It is not easy to see which is which from the Home tab, Styles Gallery. Opening the full **Styles pane** allows you to see the differences more easily. The **Styles pane** also gives you more options, so is worth keeping open when using styles a lot. See the earlier page *Understanding Styles* for more info on style types.

Activity

Continue using the same file with this exercise

Using just the Styles Gallery on the Home tab, it can be hard to determine which style is a paragraph style and which is a character style. To make it easier to see, open the Styles pane as previously (if not already open):

1. Look to the right of each style name and you will see an icon, (see below) to indicate which type of style it is.

1.1.1.1 Heading 4	¶
IndentedText	¶
keyword	a
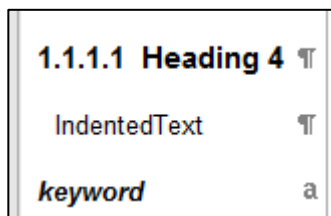
Top tip

Handy to Know…

The **Clear All** style at the top of the Styles pane clears formatting and styles from selected text

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Applying Styles to Text

Every paragraph in a document has a paragraph style applied to it – even if it is just the default *Normal* style. As well as defining paragraph features, a paragraph style also specifies the default character formatting which is applied to each character in the paragraph. You can overwrite this formatting by applying a *character* style to selected text within a paragraph.

Activity

Continue using the same file with this exercise

1. In the second full paragraph, select the word **Mariner** (in the second line)

   Currently, the text is formatted with the default character formatting set for the Normal paragraph style...

2. Click on the character style **Subtle Reference** (from the Styles pane list) to apply it.

   Notice that this character style is applied to the selected text only (unlike a paragraph style which applies to the whole paragraph)

3. Select the word Voyager (just after Mariner) and apply Subtle Reference character style.

4. Select the phrase '*Tiny by comparison to the Milky Way*', in the 3rd line of the same paragraph, and apply the **Intense Emphasis** style.

Top tip

Handy to Know…

Paragraph styles can work in two ways - both like a character and a paragraph style. If you select some text and apply a paragraph style, only the selected text is changed (as with a character style). If you just click within a paragraph and apply a paragraph style, the whole paragraph is changed.

Changing the Style Set

In Word you can choose a set of styles that are designed to work well together. The style colours and formats in a single style set create an attractive and readable document. All you need to do is choose the Style Set that is most appropriate for the document that you are creating.

Activity

Continue using the same file with this exercise

1. If the Show/Hide button is still on, turn it off, to see the page more clearly.
2. On the **Design** tab, hover over the thumbnails of the different style sets.
3. Click on several Style Sets to apply them
4. Notice that the various heading levels and styles applied earlier have been retained, but now have different formatting according to the selected style set
5. Click the Style Set dropdown button that appears when you hover over a style set thumbnail. Click on and select **Reset to the Default Style Set** at the bottom of the list
6. This option resets the style set to the one applied when the document was last saved...
7. Ensure the Style Set for this document is **Simple.**

Top tip

Handy to Know…

You can select a Style Set when you create a new document, or change it at any time

The Style Sets you see are in turn dictated by the Theme you have set. Experiment with using different Themes to see the effect this has on the type of Style Sets you can choose between.

Context

Selecting and Updating Styles (For Reference)

There may be occasions when you want to locate every occurrence of text that uses a particular style, for example if you want to see how the text would look using a different style or formatting. If you decide you like the changes, you can update the style to permanently reflect the new formatting characteristics.

Selecting All Instances

1. In the **Styles** group on the **Home** tab, right-click on the style you want to find.

2. Choose **Select All x Instance(s)** – the number of instances of text currently using the selected style.

3. All blocks of text using this style will be highlighted.

Note: You can also use the **Select All Instance(s)** option in the **Styles Pane** list. Simply click on the drop-down arrow next to the style name and choose **Select All x Instance(s)**.
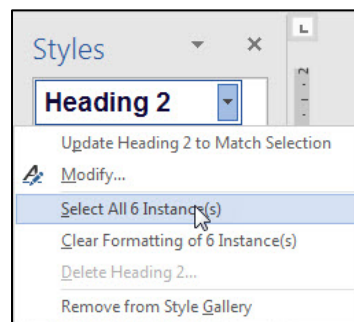
Updating Styles to Match the Selection

If you *manually* change the formatting of text that has a style applied and decide that you want the style to permanently update with the same characteristics, you can use the **Update to Match Selection** option. You don't need to use **Select All Instances** first. It may be that you've simply clicked on a block of text that has a style applied. By updating the style, any other areas of text based on that style will automatically update to reflect the new formatting characteristics.

4.   Apply new formatting to text that is based on a style.

   Note: If you want to use any of the *Font* formatting options and apply them to a *Paragraph Style*, make sure you format the entire paragraph of text and not just a word or character.

5.   Right click on the style name in the **Styles panel** and choose **Update *style name* to Match Selection**.

3 Modifying and Creating Styles

Context

Word offers a vast number of in-built styles, but you may wish to modify these or create entirely new ones to suit your requirements.

However, it is important to use the in-built **Heading styles** (Headings 1-9) keeping the same name for each level, and just modify the font or paragraph formatting within them if required.

This set of **Heading styles** is used to automatically create the **Table of Contents**. Other features such as the **Navigation pane** also rely on these style names.

Objectives

In this session you will:

- gain an overview of how to modify styles
- learn how to modify styles for your thesis
- learn how to create a paragraph style.

Modify Style Options

Context

Microsoft has provided a number of Quick Style Sets to help you quickly and easily use styles for consistent formatting within a document or set of documents. You can, of course, add your own styles or modify any styles that belong to the document or the template upon which it is based.

Opening the Modify Style options

There are different ways to access the Modify Style dialog box:

i.   Using the Styles group on the Home tab, right-click on the style you wish to change and choose **Modify**.

ii. On the Styles group, click the dialog box arrow to show the Styles list. Point to the style name you wish to change, click its drop-down arrow and choose Modify.

Either way, the Modify Styles dialog box will be displayed.

Using the Modify Styles dialog box

You can change the formatting for the selected style either using the high level Formatting tools, for most general formatting, or the [**Format**] button for further options for each category, such as Font, Paragraph, Borders, etc.

In the Modify Style dialog box, you can also choose which style the selected style is based on, and the style you want for the following paragraph (when the Enter key is pressed).

If you only want the changes you make to affect the current document, ensure **Only in this document** is selected. Alternatively, to update the style in the template that the document is based on, select **New documents based on this template**. When you next save the document, you will be prompted to also save changes to the template.

Carefully consider (and possibly avoid) use of the **Automatically update** check box. If you select this option and change the formatting of any text in your document based on the selected style, those formatting characteristics are automatically applied to the style permanently. This is a little bit like changing style formatting 'on the fly'. It is only really recommended if you are very experienced with styles and confident that individual changes you make will affect the style and potentially any text using that style in future documents.

Modifying Styles

Context

Some of the existing style names, e.g. *Heading 1, Heading 2, Heading 3* etc. and *Caption* need to be kept, since they bring useful functionality (such as being able to automatically create a table of contents). However, you may wish to *modify* an existing style to suit any departmental requirements or your personal preferences.

To note

This exercise is for practice, to see how it's done.

Activity

Continue using **Planets.docx** practice file with this exercise...

1. Click on the heading **Mercury** and reapply **Heading 2** style (if you did not change it in a previous task, you won't need to reapply it)

2. To modify Heading 2 style to be red, hover over Heading 2 style in the Styles pane and choose **Modify Style**

3. The Modify Styles box opens. Basic formatting options are available here. Click the **Font Colour** drop arrow and choose the Standard Colour: **Red**

Click **OK**. Scroll down and notice that all instances of Heading 2 in the document have been changed to red

4. Now change the formatting of **Normal** style to be **Blue**, with Double line spacing and 18pt spacing after paragraphs.

Hint, in the Modify Styles box, use the **Format** button / drop down (bottom left) and choose **Paragraph** for these further options.
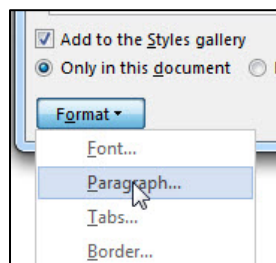
5. Click **OK** (twice) to make the changes.

Note: by default, these changes only affect the current document. Later we will see how to also save changes to the template and any future documents based on it.

Context

To note

Activity

Creating a New Paragraph Style

If you need to create a new style you can use the **New Style** button, at the top of the Styles pane. From here, in addition to the normal character and paragraph attributes, you can set other details such as style type, style for the following paragraph, and so on.

Continue in the **Planets.docx** file for this exercise

1. Click on to the Styles pane launcher and then select the **New Style** button to open the **Create New Style from Formatting** dialog box
2. Name the style **Indented Quote** and leave Paragraph as the style type
3. Leave style based on as Normal (this means that it takes on the basic attributes of Normal)
4. Style for following paragraph determines what style follows after pressing the Enter key at the end of a paragraph. Choose **Normal**
5. Give the style the following attributes:
- **Cambria font**
- **Font size 10**
- **Italic**

Still in the New Style box, click **Format > Paragraph…** to set:

- **Indented left and right by 1.5 cm**
- **Spacing After: 10 pt (you can over-type the figure in the box)**
- **Line spacing: Single**
- **Tick "*Don't add space between paragraphs of the same style*"**

Click **OK** (twice) to finish the style

The new *Indented Quote* style will appear in the Styles list. Apply it to one or two paragraphs to test it.

The paragraph symbol to the right of its name indicates that it is a paragraph style. Note that the Style type can be difficult to modify afterwards. If you selected the wrong one to begin with you may need to start again.

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4   Creating a Thesis Template

Ideally, before you start writing up your thesis, create a template containing the page layout settings and heading styles required. Then you can base each chapter on this template, saving each one as a separate file. In this chapter we set up such a template.

Writing your thesis using styles and a dedicated template will speed up and simplify the creation of your chapters, make global formatting changes much easier, and allow you to instantly create tables of contents, figures and tables, based on good use of Heading Styles.

In this session you will:

- learn how to set up margins suitable for a thesis
- learn how to set up and modify Styles for a thesis
- learn how to add heading numbering to the styles
- learn how to add chapter numbering to Heading 1 style
- learn how to start a new chapter based on a template.

Thesis Margins and Saving as a Template

Context

The University requires that **margins** allow for hard binding. It is also good to leave space for headers and footers to be added. Double-sided printing is assumed here to save paper (but do check first with your department if this is OK). In this task we save the margins as part of a **thesis template** that can be used as the basis for each chapter.

Activity

Start with a new blank document on screen…

To set the margins for double-sided printing:

1. Go to the **Layout** tab.
2. Select **Margins** and then choose **Custom Margins**
3. Select the option for Mirror margins as shown
4. Set the margins as shown:
5. Top / Bottom keep at 2.54cm Inside: 4cm   Outside: 3cm
6. Click OK

7. To now save the file as a template: Go to **File > Save As Template**
8. Check that the file type is set to **Microsoft Word Template (*.dotx)**. This directs you to the default folder for saving templates (you can change it if you want to).
9. Name the file **Thesis template** and double-check everything before clicking Save
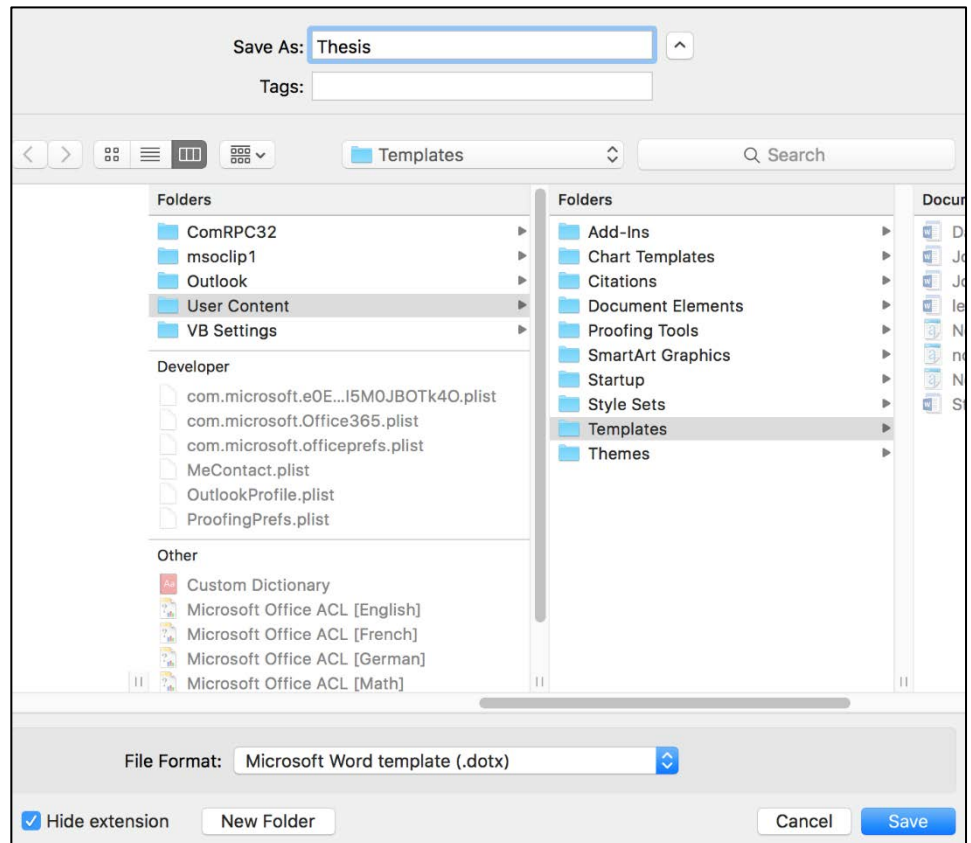
Leave your new Thesis template open as we will add to it in the next task

Modifying Styles for a Thesis

Context

Text in a thesis is normally in double or 1.5 line spacing with a font size chosen to ensure clarity and legibility of all parts of the text. In this task we add Styles to the template that can be used as a basis to create each chapter of your thesis. Regarding fonts and formatting, remember to also check your department's guidelines in case they give any specific instructions.

Continue in your Thesis template for this exercise

Activity

1. Click on the **Design tab** and set the **Style Set** to be **Simple**. (You will have to hover your mouse over the thumbnails to view the names of the style sets. The one you are looking for is usually 10th in the list.)

2. Modify the Normal style so that spacing after paragraphs is 18pt and line spacing is 1.5 (Hint, these are **Paragraph** settings)

3. Modify the Quote style so that:
   i. Font – not italic
   ii. Font – size 10pt
   iii. Alignment – justified
   iv. Indent – left & right 1cm
   v. Spacing Before paragraph 0 pt and After paragraph 18 pt
   vi. Line spacing - Single
   vii. Tick the box: Don't add space between paragraphs of the same style

(This last point ensures that paragraphs continuing in this Quote style will not have space between them, but there will be space after the final paragraph.)

4. Modify Heading 2 style to be Italic

5. Click **Save** and keep the template open for the next task

Heading Numbering for a Thesis

Context

It is helpful in a thesis to have heading numbering which clearly distinguishes between different chapters or sections. In this task, changes are initially made to Heading 1 style, and these also automatically affect Heading 2 - Heading 9 styles. Whilst most style changes can be made in the Modify Styles box, this change cannot be, so is done using the Multi-level List options.

Continue in your Thesis Template for this exercise...

Adjusting the heading numbering affects all the heading styles, but (surprisingly) this change isn't made from the Modify Styles box.

Look at the Home tab's **Paragraph** group. Next along from the Bullets and Numbering icons is Multi-level List

1. Click the Multi-level list icon
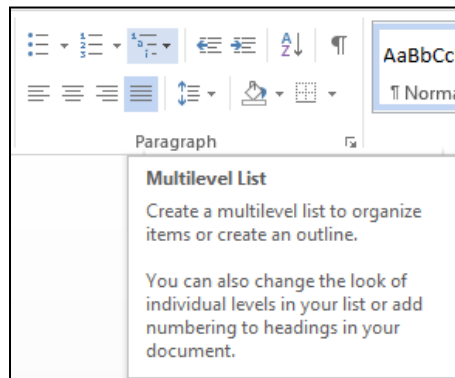
2. From the List Library select the 6th option, as shown:
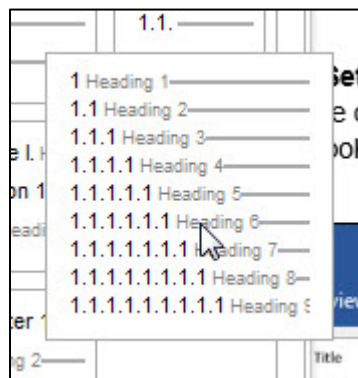
3. Notice in the Styles pane that all the heading styles have been updated and now show:

    1 Heading 1,

    1.1 Heading 2 etc

4. Save these changes and keep the template open

Adding Chapter Numbers

Context

It is helpful to clearly distinguish each chapter by its numbering. In this task a further change is made to **Heading 1** style to add the word '**Chapter**' to it, so that if Heading 1 level is reserved only for starting each chapter, its title will automatically start with **Chapter 1, Chapter 2, Chapter 3**… etc. This will also be reflected in the Table of Contents, to save you time later.

Activity

Continue in your Thesis template file for this exercise...

1. Click the Multi-level list icon on the **Home** tab and this time choose **Define New Multi-Level List**

| Define New Multilevel List... |
| Define New List Style... |
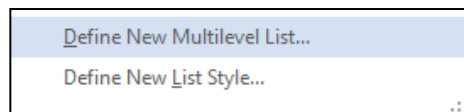
2. Check that **1** is selected underneath *Click level to modify:*
3. Under *Enter formatting for number*, put your cursor before the number 1 which is shaded grey, taking care not to delete it. This number is an automatically updateable field, allowing Word to number the chapters correctly according to their position in the document
4. Type **Chapter** then press OK and observe the changes to Heading 1 style in your Styles list
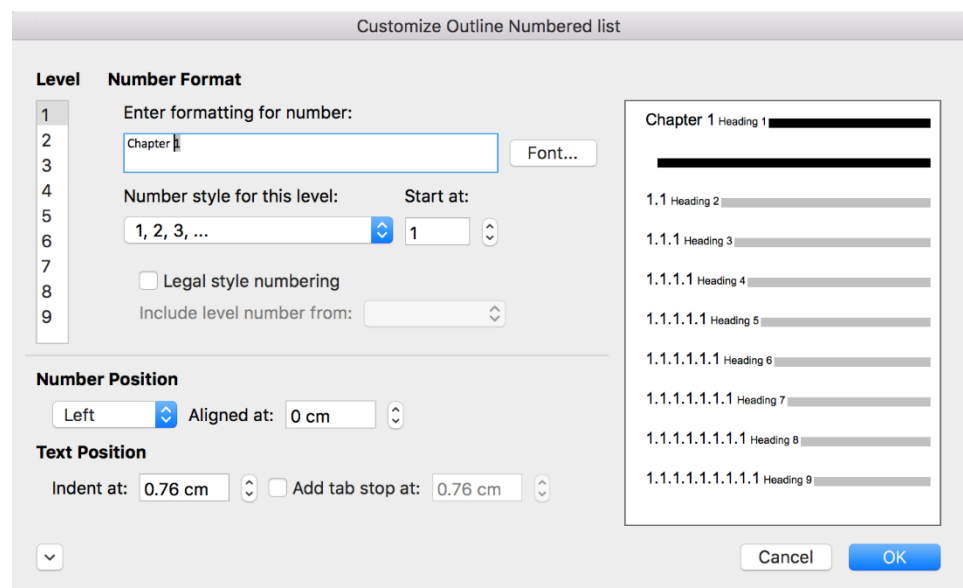
5. Save these changes to the template and close it.

Starting a New Chapter from the Template

Context

IT Services recommend each chapter of your thesis is created and saved as a separate file, then brought together into one main file at the end. This makes it easier to manage and harder to lose your work all at once, if a problem occurs.

In this exercise we create a **new document** based on your **Thesis template** created in the previous tasks.

Activity

Start with Word open but all previous files closed

Remember we are making a New file based on a template – do not open the template itself!

1. Go to **File > New from Template** and select your Thesis template and click **Create**. A new document is created based on it. The file looks the same, but check the title bar at the top of the screen says *Document #*

2. Type the heading **Introduction** and make it **Heading 1** style. It should now read **Chapter 1 Introduction**

3. Start a new line and type **=rand()** and press Enter.

   3 paragraphs of text should appear. This is a code for generating some 'dummy' text to work with

4. Apply **Quote** style to the first of these paragraphs

5. After the first and second paragraphs, type two sub-headings as shown below and format in **Heading 2** and **Heading 3** style respectively

---

Chapter 1   INTRODUCTION

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

1.1   BACKGROUND INFORMATION

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

1.1.1   PRELIMINARY RESEARCH

The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog. The quick brown fox jumps over the lazy dog.

---

6. Save the file in **Documents** as *Introduction.docx* and close the file.

7. Please keep to the filenames and locations given, as these will be referred to later.

5 Style Changes in a Template

When creating your thesis template, it is difficult to think of and create every style you might need before you start writing. You may therefore want to create additional styles or modify existing ones as you go along, adding these to template so that they are available for future thesis chapters.

In this session you will:

• Learn how to make changes to styles and add these to an existing template.

Style Changes in a Template

Context

It is not unusual to realise that you need extra or modified styles after you have created and started using your template. Such changes can be made in the chapter you are working on, and then also saved into the template to influence future documents. (In the following task we will also see how to reapply the updated template to existing documents.)

Activity

1. Create a new document based on your *Thesis template.dotx*
2. Type the title *Rationale* at the top and format this in **Heading 1** style. Type a couple of sub headings as shown opposite and apply **Heading 2** style to these
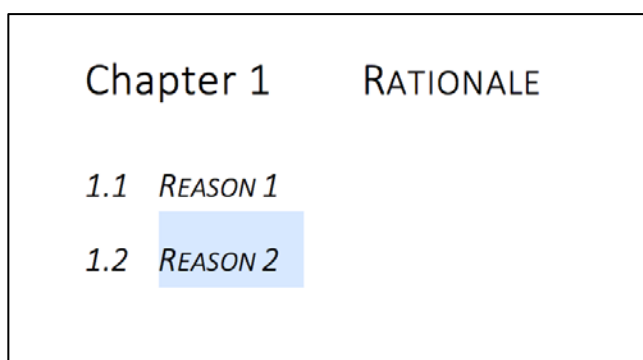
3. Now let's modify **Heading 1** style to have a border underneath it.
4. Open the **Modify Style** box for Heading 1. Click on the **Format** button in the bottom left and choose **Border**
5. Click the Bottom border icon and then click OK once only.
6. You will see a preview of the change in the **Modify Styles** box.
7. We'll also add some space after the border: go to **Format > Paragraph** and change Space after to 6pt
8. Before leaving the **Modify Style** box tick *Add to template*. This will allow you to save these changes to the template for future documents that you create based on this template

33
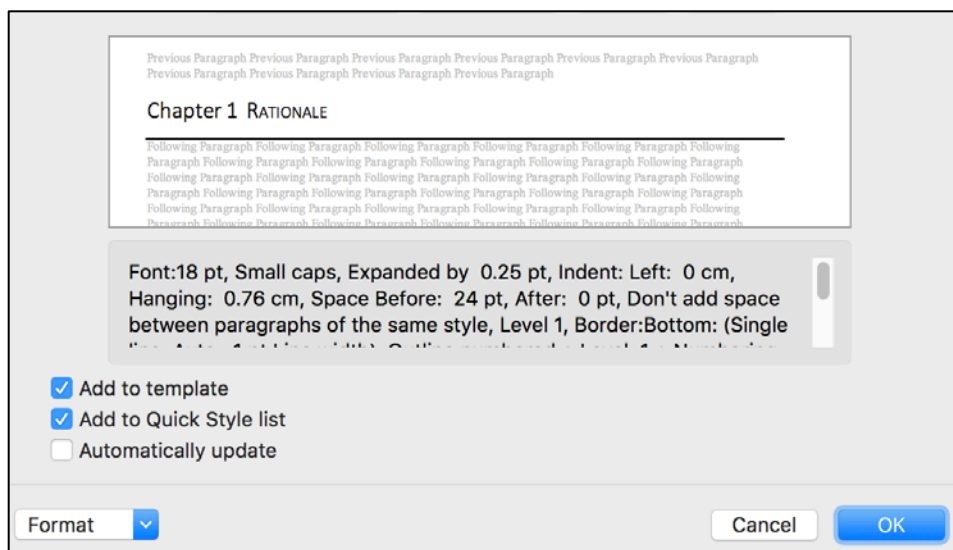
9. Note: documents already created based on this template will not yet include this update, but we will change this in the next task

10. Click **OK** and then save the new chapter in *Documents* folder with the filename *Rationale*.

11. When prompted 'Do you also want to save changes to the document template?' choose Yes

Do you also want to save changes to the document template?

No   Yes
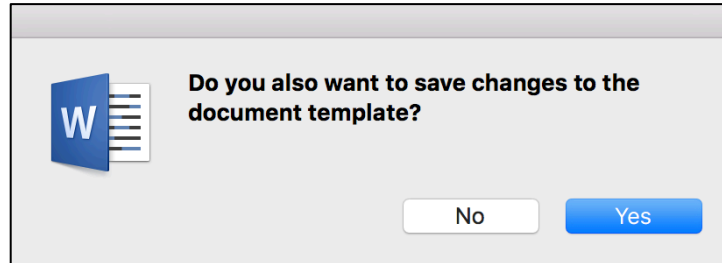
12. Close the file.

6

Attaching an Updated Template

When you make any style changes and save these to the template, the updated version will affect all future documents based on that template. However, any earlier documents based on the same template will not automatically adopt these changes. So, for consistency, you would need to re-attach the (now updated) template to the earlier document.

You may also wish to apply a different template to a particular document, which is covered here too.

In this session you will:

• learn how to apply an updated template to a document
• learn how to apply a different template to a document
• gain an understanding of working with templates if you do not always use the same computer.

Attaching an Updated Template

Context

Changes to a template are not automatically updated in existing documents based on it. You can add to or alter the styles in a document by attaching a different template, or by updating style changes from the existing template. Styles used in the existing document which have the same name as styles in the new template, will be updated with the new template settings.

Activity

Before starting this exercise open your **Introduction.docx** chapter

Notice that in your Introduction file there is no border under Heading 1 style, even though it is based on the Thesis template

1. Click the Tools menu, then Templates and Add-ins… to open the Templates and Add-ins dialog box
2. Notice the document template listed is already *Thesis template.dotx*, which is correct, but we need to force the document to check the template and update itself with any changes
3. Tick *Automatically update document styles*, this ensures all styles in the current document are updated to match those in the new template with the same name

> **Templates and Add-ins**
>
> Document template:
>
> er Content.localized/Templates.localized/Thesis.dotx
>
> [Attach...]
>
> ☑ Automatically update document styles
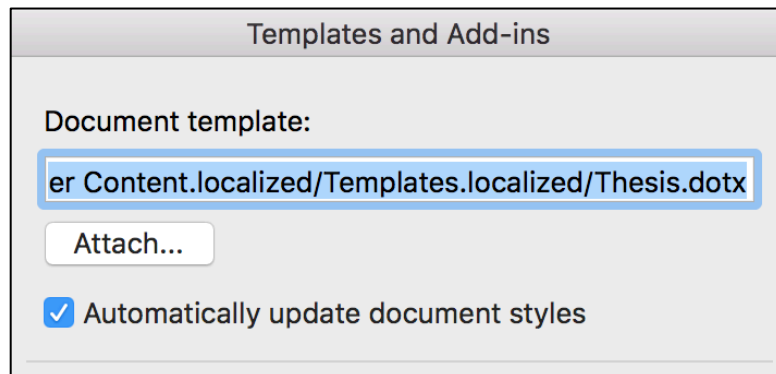
4. Click **OK**.
5. Check that **Heading 1** style has been updated to now include a border
6. Save changes and close the file.

Context

Applying a Different Template (Optional)

All documents created in Word are based on a template – and unless you specify otherwise, this is the *Normal* template. Word lets you retro-fit a new template to an existing document. If the paragraph styles used in the document have the same name as styles in the new template, those paragraphs will be updated to match the new template.

Activity

Before starting this exercise you MUST open the file **W714 Templates_1.docx**

The styles Heading 1, Heading 2 and Normal have been applied to the paragraphs in this document.

1. Open the Templates and Add-ins dialog box as before
2. Click on **Attach** to open the **Attach Template** dialog box
3. Navigate to your **Templates** folder and select your Thesis template.
4. Click **Open** to return to the Templates and Add-ins dialog box
5. Click on *Automatically update document styles* and ensure it appears ticked – this will update all styles in the current document to match those with the same name in the new template
6. Click **OK** to update the document.
7. You should see that the styles have all been updated to reflect the latest changes you made to your template.
8. Close the file (there is no need to save changes, for this practice exercise).

7 Pictures and Captions

Pictures, if chosen carefully, can tell you at a glance what a document is about and communicate far more to the reader than just the text. They can also add colour and style to your thesis, or may be used to add a further level of technical detail.

Captions are labels that you can apply to objects such as pictures, tables, figures or charts.

If you use Word's caption tools they are automatically and sequentially numbered, enabling you to identify and refer to specific objects in the document. Word manages the caption numbering so that when you add or remove objects, the numbering is automatically adjusted.

In this session you will:

* gain an understanding of captions
* learn how to create a caption for a picture
* learn how to create a caption for a table
* learn how to update captions
* gain an understanding of longer captions
* learn how to use automatic captions
* learn how to see fields in a document
* learn how to update fields when printing.

Understanding Captions

Context

To enable you to identify and refer to objects within a document, such as tables and figures, you can add a caption to each of these objects. A *Figure* caption usually appears below the object and consists of a label and a number. Each object is identified by its unique label and number. You can choose from a standard list of labels (*Figure, Table, etc.),* or create your own.

Captions enable you to identify objects in a document. This is particularly useful in a long document.

The caption consists of two parts: a label to identify the type of object (e.g. table, figure etc), and a number to distinguish objects of the same label type. The number part of the caption is automatically applied and is sequential, ensuring that each caption is unique.

Following the caption number, you can provide a brief title or description of the object, adding a bit more meaning to it. An example is shown below:

Figure 1: Agriculture versus native ecosystems

One benefit of using captions to label objects in Word is that if you move or delete an object, the caption numbers are automatically adjusted to reflect the new order. Another benefit is being able to generate an automatic Table of Figures. This is similar to a Table of Contents, in that each item is listed along with the respective page number. By listing each captioned object in a long document, you enable a reader to locate information more readily. It also provides a means of referring to specific objects in the text (e.g. ***….as shown in Figure 1***).

Word provides some default labels (***Table***, ***Figure*** and ***Equation***), but you are able to customise the list and add any labels of your own (e.g. ***Chart***, ***Item,*** ***Photo,*** etc). You can then list each item type in separate *Tables of Figures*, one below the other, typically after the main *Table of Contents*.

Inserting a Picture

Context

An image file, eg. picture, chart or photo can be inserted using *Pictures* in the *Insert* tab. There are two options: **Photo browser…** and **Picture from File…** Depending on how your Mac is configured **Photo browser**… will usually point at the Photos app. **Picture from File…** is used to insert images from your drive/s. Images are inserted wherever the insertion point is placed and inherit styles so take care that it is not in a Heading style or you may end up with a picture in your table of contents. By default pictures are inserted *In Line With Text*. Leave this setting in place, as text wrapping may interfere with captions.

Activity

Before starting this exercise you MUST open the file **W732 Pictures_1.docx**

1. Click at the end of the heading Wheat Research and press Enter to make a space, and check that it its format is **Normal** style
2. (If you do not, the picture may be inserted in Heading 2 style and later appear in the Table of Contents)
3. On the **Insert** tab, click on **Pictures > Picture from File**
4. Finder will be displayed.
5. Navigate to the course files folder
6. Select **W732 Wheat 1.jpg** then click on **Insert**
7. If you wish to resize the picture to make it smaller, remember to use a corner handle to maintain proportions.
8. In a similar way, after the heading Disease Research insert the picture **W732 Wheat 2.jpg**

We will now make this file into another 'chapter' of the thesis:

1. Attach the Thesis template to this file, remembering to automatically update the styles

2. Check that the Heading styles look right. If unsure, refer to previous tasks on attaching templates to get this right, as it is needed for future tasks

3. Go to **File > Save As**, save the file as *Wheat.docx* in Documents

4. Keep it open for the next task…

To note

The way a picture first appears (e.g. In Line with text) is controlled from **Word > Preferences > Edit > Editing Options**
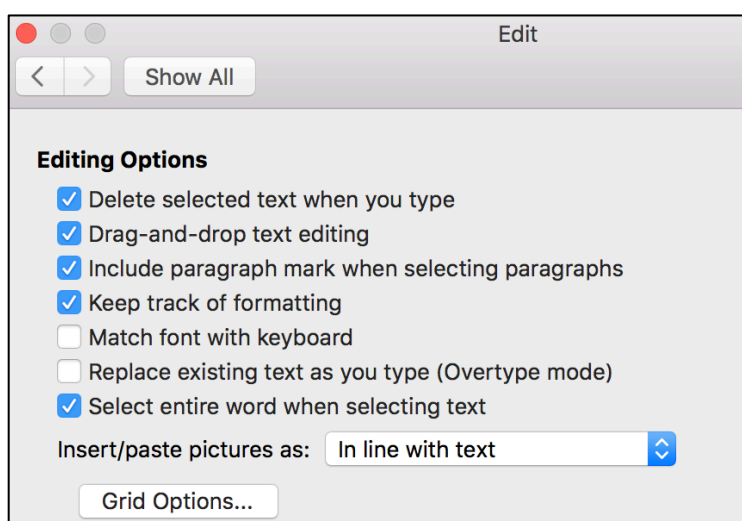
Creating a Caption for a Picture

Context

If including a picture of any kind it is useful to include a proper **caption** to identify and describe it. Picture captions typically have the label **Figure,** followed by a sequential number which can include chapter number if required. If inserted using the **Caption** tools, they can be used to create a **Table of Figures** to automatically list the Figure number, title or description, and page number. They can also be referred to using the Cross Reference tool.

Activity

Continue using the same file **Wheat.docx** for this exercise…

1. Click on the first picture to select it
2. On the **References** tab, in the **Captions** group, click on **Insert Caption**
3. In the **Caption** box, type a Space and a title: *Wheat in a field*
4. Note: any caption formatting, including colour, is set in the **Caption style** – so can easily be modified later from the Styles pane
5. Label: check that the label says **Figure**

   Note that if needed, a different label eg Table, can be selected from the drop arrow for Label
6. *Position*: ensure that **Below selected item** is selected, for a Figure (whereas Tables often have the caption displayed above them)
7. Click the **Numbering: Format…** button and tick the box Include chapter number.

   Notice that the *Chapter starts with style:* dropdown is set to Heading 1. Leave this and other settings unchanged to include the chapter number in your captions. Click **OK**
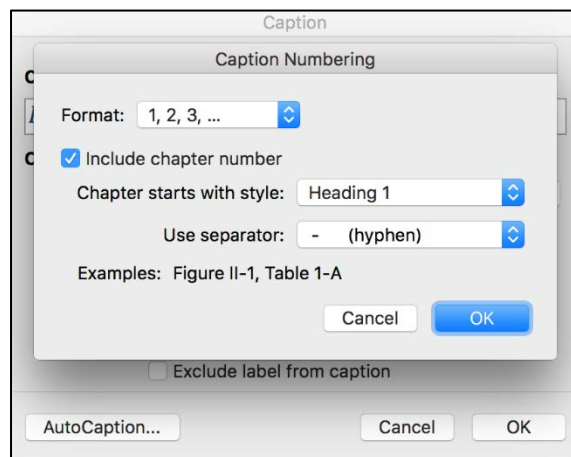
8. Click **OK** again. A figure caption is inserted below the picture
9. Repeat steps 1 to 5 to apply the caption *Figure 1-2 Wheat and sky* below the second picture (page 2)
10. Save the file and keep it open…

Top tip

Click on **New Label** in the Caption dialog box to create a new type of label (e.g. Map or Chart) as an alternative to the standard Table, Figure or Equation.

Top tip

A style called **Caption** appears in your list of styles. To change the way a caption looks, alter the settings of the Caption style not each individual caption.

Creating a Caption for a Table

Context

Tables can be used for displaying a wide array of information. In more formal documents, it is often appropriate and convenient to provide a caption for the tables – this enables you to refer to a specific table in the text. Just like with images, Word allows you to generate an automatically numbered *Table caption*, which can include the relevant chapter numbering if you wish.

Activity

Continue using the previous file with this exercise

1. After the heading *1.3 Farming Research*, press Enter twice and then insert a table of 4 rows by 5 columns

2. To insert a table caption, click inside the table, click on the **References** tab on the ribbon then click **Insert Caption** in the Captions group

   This will display the Caption dialog box…

3. Ensure the selected Label is **Table**

   If the caption just shows Table 1, click the Numbering button and tick to 'Include Chapter numbering' to show 1.1

4. After the caption Table 1.1, press Space and type *Research data from field work*

5. Using the drop arrow for Position ensure **Above selected item** is selected

6. Click **OK** and **Save** the file

   The caption will be inserted above the table. If it is too close to the heading above, add a line of space as appropriate.

Updating Captions

Context

If you insert a new object in amongst current document text and apply a caption to it, the caption numbering will initially be out of order. Similarly, if you move or delete an object with a caption, the other objects' caption numbers are not immediately *updated*. Word requires you to update the number fields manually to adjust the sequence. Don't worry, it's not as hard as it sounds and all of them can be updated in one action.

Activity

Before starting this exercise you MUST open the file **W757 Captions_6.docx**

1. On page 2 select the table plus the line of text above it and the table caption Item 4… below it, as shown
2. Press **Cmd + X** to cut the selected information

   Let's now move it to page 1
3. Move to the 1st page and then click to the left of the second paragraph starting: As you can see…
4. Press **Cmd + V** to paste the information here

   Notice that the caption has not been renumbered
5. Press **Cmd + A** to select the entire document
6. Right-click on the highlighted document text to display the shortcut menu
7. Select **Update Field** then click on any part of the document to see the effect more clearly. If you scroll through the pages, you will see that the captions have been renumbered to reflect the new order of items

Longer Captions (Optional)

Context

Your caption may require a main caption, followed by a long explanatory part. Only the main caption should appear in the List of Figures. There are 2 ways of excluding the explanatory text; which one you use depends on how you want the captions to appear.

Method 1

If the explanation is a separate paragraph to the caption title, but you want it to appear in Caption style, as in the picture below, proceed as follows:

FIGURE 1-2 WHEAT AND SKY

THIS IS A PARAGRAPH OF TEXT WHICH HAS BEEN FORMATTED IN CAPTION STYLE, BUT AS IT IS BELOW THE LINE OF THE CAPTION, IT WILL NOT BE INCLUDED IN THE LIST OF FIGURES

The list of figures is generated from any paragraph beginning with the word **Figure** (or any other **Label** that you use, eg Table, Chart etc). Create your main caption as explained previously. Once created, at the end of the caption, in your main document, press the **Enter** key and then write the explanatory paragraph and format it using the **Caption** style. It will not appear in the List of Figures. Note that you may have to access the Caption style via the **Styles pane** as it may not appear in the gallery of styles on the **Home** tab.

In addition, you can modify the Caption style so that the style for the following paragraph is also Caption style. In this way, when you insert a new line after a caption, it will automatically be in Caption style. When you want to return to another style, simply apply another style to the new line.

Method 2

If the caption needs to be a continuous paragraph of text, as in the picture below, of which you want only a part to appear in the list of figures, proceed as follows:

FIGURE 1-2 WHEAT AND SKY THIS PARAGRAPH OF TEXT WHICH IS A CONTINUOUS PART OF THE CAPTION WILL ALL BE INCLUDED IN THE LIST OF FIGURES. ONCE THIS LIST IS CREATED, TEXT THAT IS NOT REQUIRED IN THE LIST OF FIGURES NEEDS TO BE MANUALLY DELETED

1. Create the caption as explained previously containing all the text you need.
2. When you create the list of figures (see later chapter), delete the unwanted explanation that appears in the list. If you update the list of figures, choosing the setting **Update Page Numbers Only** will keep the text as it is and update the page numbers only. **Update Entire Table** will make the unwanted text re-appear. You will need to decide which option is appropriate.

To push pictures and captions nearer to each other:

1. Adjust the caption style so that **Spacing** is **0**.
2. Create a **Picture** style, where the style is based on **Normal** but has no spacing after the paragraph. Apply the picture style to all paragraphs containing a picture.
3. Go to **Layout** for each picture you wish to adjust and alter the spacing accordingly

8 Section Breaks

By default, Word documents are created in a single section and the document level formatting you apply therefore controls the entire file.

However, by inserting section breaks you are able to partition the information in a document, thereby allowing you to apply different formatting or layout to individual sections. As a result, sections can be used to:

- change the page orientation for individual pages
- change the vertical alignment of text on a page
- create different headers and/or footers for parts of a document
- create newspaper-style columns in parts of a document

In this session you will:

- gain an understanding of section breaks and sections
- learn how to insert a next page section break.

Understanding Sections

Section breaks enable you to segregate parts of a document, thereby applying different formatting and layouts to different *sections*. For instance, having two sections in a document enables one section to have portrait orientation and the other to have landscape orientation. There are four types of section breaks: *Next Page*, *Continuous*, *Even Page*, *Odd Page*.

What is a Section?

First of all, it is important to understand that some formatting and layout options available in Microsoft Word are applied automatically to an entire document, irrespective of whether it consists of one page or one hundred pages. Examples of document-wide formatting and layout options include headers and footers, margins, page orientation and vertical text alignment.

However, consider a situation where you want to change the orientation of a single page to landscape, enabling you to neatly insert a table with thirty columns. Or perhaps you are writing a book? In that case, you will want different headers and/or footers for each chapter.

The way to achieve this is to *section* off each part of the document that requires alternative formatting or layout. By inserting *section breaks*, you create sections and effectively isolate each part of the document and protect it from formatting applied to other sections.

Section Break Types

Next Page

As the name implies, a *Next Page* section break will start the section on the next page. You would use this break when the changes you want to apply affect entire pages. For example, if you want to: create different headers and footers for different chapters, or if you want to change the page size, orientation or the margins for one or a number of pages, then *Next Page* section breaks are ideal.

Continuous

A *Continuous* section break enables you to isolate text within a page and can be used, for instance, to create newspaper-style columns. By default, text on a page is in one column, which spans from the left to right margin. By inserting two continuous section breaks (one at the beginning of the text you want to isolate and the other at the end) you can apply a multi-column format to the section.

Even Page

The *Even* and *Odd Page* section breaks are used in documents with double-sided formatting. In this case, an *Even Page* section break will start the section on the next even page and is useful, for example, to ensure that the next chapter begins on a left hand page.

Odd Page

An *Odd Page* section break will start the section on the next odd page and is useful to ensure, for example, that the next chapter begins on a right hand page.

Inserting a Next Page Section Break

Context

A **next page section break** is probably the most commonly used of the section breaks, especially in large documents. By inserting **next page** section breaks you are able to control pagination plus isolate and control the layout and setup of the pages in each section; including page numbering, headers and footers, page orientation and vertical alignment of text.

Activity

Before starting this exercise you MUST open the file
W728_ChapterX_1.docx

A page break starts a new page without having to type to the bottom. A next page section break starts a new page, but also creates a new section.

1. Scroll to page 3. This page needs to be landscape to accommodate the table
2. On the Home tab, click on the Show/Hide icon. This enables you to see section and page breaks clearly
3. Delete the page breaks above and below the table. Notice that the table now jumps up onto the previous page.
4. Put your cursor in a blank line just above the table. Click on **Insert > Break > Section Break (Next Page)**.
5. Insert another next page section break after the table
6. Click in the table. On the Layout tab, click Orientation and choose Landscape. This changes the orientation for the current section, ie the table page, only
7. We want this to be a thesis chapter. Attach the Thesis template and save in **Documents** as *Lit Review.docx*

Top tip

You can display the section number in the status bar. Right-click on the status bar to display the Customise Status Bar menu and select Section (if there isn't already a tick beside it)

Customize Status Bar	
Formatted Page Number	49
Section	6
✓ Page Number	Page 49 of 51
Vertical Page Position	21.7cm

Top tip

When a section break is deleted, the section above adopts the formatting of the one below.

9 Inserting Files

It is recommended that you write your chapters as individual files. This helps to reduce the risk of losing your entire thesis if something goes wrong, and makes each file easier to manage. Once all the files are written they need to be combined into one main document.

In this session you will:

* learn how to create the main thesis file
* learn how to insert files (thesis chapters) into a main thesis file.

Creating the Main Thesis File

Context

Once all the chapters of a thesis have been written, they need to be combined together into one file. In this way, the heading and caption numbering will adjust to give consecutive numbering. The file into which you insert your chapters should be based on the same template as the chapters.

Activity

Ensure you have a new blank document on screen

1. Create a new document based on *Thesis template.dotx*. This will be the main thesis file you will insert the chapters into.
2. At the top of the page type **Title Page** and format it in Calibri, 20 pt, centred and bold
3. Press Enter twice to create a couple of blank lines
4. Save in the **Documents** folder as *Main Thesis* and leave the file open

Inserting Files into a Thesis

Context

Once you have created your Main Thesis file, you can insert the chapters. The chapters should re-number themselves correctly once inserted. If not, reapply the heading styles to any incorrect headings. It is sensible to keep backups of the main thesis file as well as the individual chapters as there is no link between them.

Activity

Continue using the previous file with this exercise

1. Place your cursor where you want to insert the file, then click on the **Insert** menu and choose **File.**
2. In the resulting window make sure you set the "**Enable**" dropdown to "**All Files**"
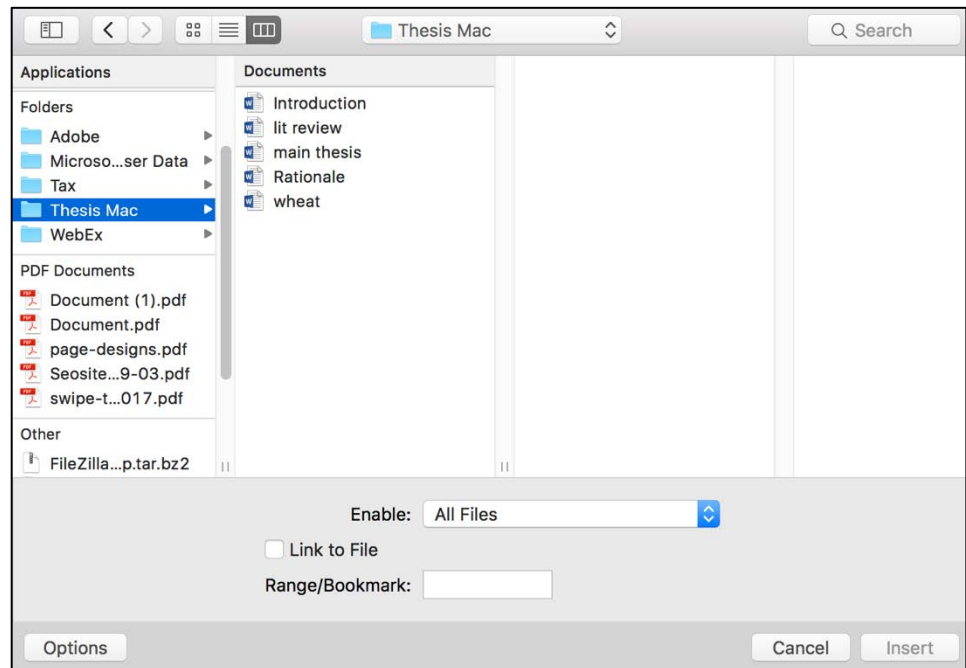
3. Browse to **Documents** and double click on your **Introduction** file to insert it
4. Repeat steps 1 and 2 to insert your Rationale, Wheat and Lit Review files
5. Notice that your captions, with chapter numbers, are now wrongly numbered. To correct them, hold down **Cmd** and press **A** to select the whole document, then press **F9** to update all fields ("fields" are codes that enter information automatically) at once
6. Save the file

10 Working with Large Files

This final document can be quite long and there are techniques that allow you to more easily move around your document and move sections of your document around.

In this session you will:

- learn how to display and navigate the Document Map
- learn how to work with an outline.

The Document Map

Context

When creating or working in larger Word documents, navigation may get a bit tedious and time-consuming. The Document Map is a navigational pane that can be displayed in addition to, and alongside, the main document window and presents a list of document headings (when using heading styles). This summarised view enables you to move quickly around the document, based on these headings.

Activity

1. Continue using your *Main Thesis.docx* file
2. Click on the **View** tab on the ribbon then tick the **Navigation Pane** option
3. A narrow pane is displayed to the left
4. Choose the view type you want (thumbnail or list) using the icons at the top
5. Click on *3.1 Wheat Research* in the Navigation Pane

   The insertion point will be moved to that position in the document...
6. Click on *3.3 Farming Research* to jump to that heading
7. Click on *Chapter 1 Introduction* to return to the top of the document

Click on the cross in the top right of the Navigation Pane to close it

Working with an Outline

Context

Outline gives you an overview of a document's structure and allows you to easily *collapse*, *expand* or *reorder* your text as required, thereby restructuring your document. *Collapsing* an outline hides the detail, one level at a time, *expanding* an outline displays the detail. You will find that the easiest method of moving information in a long document is through using *Outline* view.

Activity

Before starting this exercise you MUST open the file **W771 Outlining_1.docx**

Select Outline View. This view can be reached from the **View** tab by clicking on Outline on the left of the ribbon.

1. Click on the drop arrow for **Show Level:** then select Level 1 to see only the top-level headings (the box to the left will promote or demote your heading level so be careful using that!)
2. Repeat step 1 to display Level 2 headings
3. Repeat step 1 and select Level 3 to see all the headings in this particular hierarchy
4. Double click on the **+** symbol next to **Meeting Rooms second floor** to hide and show the detail below this heading
5. Click on the drop arrow for Show Level (as in 1) and select **All Levels**
6. Click on **Advertising** then click on **Move Down** to change its position in the hierarchy and move the heading and associated text
7. Display Level 1 headings only
8. Click on **Sales and Marketing** then click on **Move Up** twice
9. Display all heading levels - notice that the Sales and Marketing headings are now at the top of the document

11 Header and Footer Techniques

When headers and footers are inserted into a document, by default they are inserted on every page. However, using the options available in Word you are able to create different headers and footers for different pages – a feature that is useful in longer documents, for instance if it is double-sided or if it contains a cover page and/or chapters.
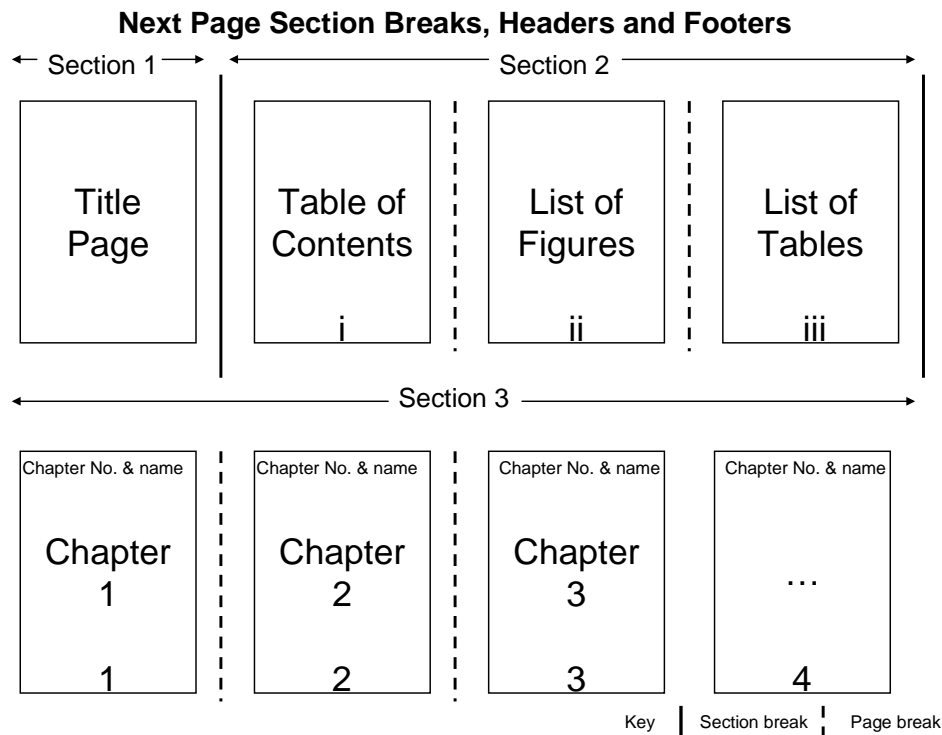
In this session you will:

* gain an understanding of headers and footers in longer documents
* learn how to create section headers and footers
* learn how to insert headers relevant for a dissertation
* learn how to create footers suitable for a dissertation
* learn how to alter the orientation of page numbering on landscape pages.

Headers and Footers in Longer Documents

Context
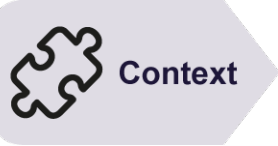
In documents with only a few pages, creating headers and footers is typically a fairly straightforward task. In longer documents, however, you have the added complications of cover pages, sections, printing double-sided (in a book format) and the like. Word enables you to customise the ***headers and footers of longer documents*** to cater for all of these needs.

In documents with a limited number of pages, you would typically repeat the same header and/or footer throughout the document. In longer documents, however, you might have the need for a range of headers and footers. This might arise in your dissertation if you want a title page, introductory pages (eg a Contents page etc) and ochapters. In this case, you would not necessarily want headers and footers to appear on the title page. You might then want different headers and footers on the introductory pages to those on the chapters, in which you might want to include the name of the chapter, see example below.

Next Page Section Breaks, Headers and Footers

← Section 1 →   ← Section 2 →

Title Page	Table of Contents	List of Figures	List of Tables
	i	ii	iii

← Section 3 →

Chapter No. & name	Chapter No. & name	Chapter No. & name	Chapter No. & name
Chapter 1	Chapter 2	Chapter 3	…
1	2	3	4

Key | Section break ┊ Page break

Header and Footer Options

First Page Header/Footer – in the sample shown above, a different header and footer has been nominated for the first page (ie no header or footer). This enables you to construct a cover or title page.

Sections – if the document has multiple sections, created by inserting section breaks, then you can have different headers and footers within each section. Each section is indicated in the header and footer label to make it easier to orientate yourself within the document.

12 Creating Sections for Headers and Footers

Creating **sections** in a document enables you to independently configure each section. This also extends to the creation of **different headers and footers**. In your dissertation, the title page has no headers or footers, whilst the introductory pages have different headers and footers to the chapters

Continue using your **Main Thesis** document. Alternatively, if you are concerned about the outcome of previous tasks, open the **file Main Dissertation_1.docx**.

We need to set up sections breaks and page breaks as per the diagram on the preceding page

1. Insert a next page section break after the heading **Title Page** (hint, look on the Layout tab > Breaks)
2. At the top of page 2, type the heading **Table of Contents** and insert a page break after this
3. On page 3, type the heading **List of Figures** and insert a page break.
4. On page 4, type the heading **List of Tables** and insert a next page section break

   This section break should move Chapter 1 onto page 5
5. Click at the start of the word Rationale in Chapter 2 and insert a page break at this point. Repeat this for the other two remaining chapters. Note you may not need to do this if you inserted a page break as part of the Heading 1 style.
6. Save your document and leave it open

Top tip

Whilst you could use Word's **Different First Page** feature to have no headers or footers on your **Title Page**, this feature doesn't put a section break after the first page which later interferes with the page numbering in the second section.

Creating Thesis Headers

Context

Whilst the title page and introductory pages of a dissertation may need no header, it is helpful for the chapters to have headers which are linked to the chapter name and number. To do this, codes will be added, called *Fields*, to automatically insert the correct chapter number and name in the header. This is done once, then, if each chapter starts on a new page, will change for each chapter.

Continue using the previous file with this exercise

1. Double click in the header space on page 1 to open the Header & Footer tab
2. Referring to the diagram on page 57, the first and second section headers are blank, so in the Navigation group, click on Next Section twice to go to section 3 header
3. Section 3's header is different. To allow this, in the Navigation group, click Link to Previous to switch off the link to the previous section
4. To insert a chapter number: On the **Insert** menu choose **Field…**
5. In the **Categories:** box choose **Links and References**
6. In the **Fields names:** box choose **StyleRef** and
7. Now select the **Options…** button

```
                          Field

Categories:                   Field names:
Document Information          IncludeText
Equations and Formulas        Link
Index and Tables              NoteRef
Links and References          PageRef
Mail Merge                    Quote
Numbering                     Ref
User Information              StyleRef

Field codes:  STYLEREF StyleIdentifier [Switches]

STYLEREF

Description:
   Insert the text from a like-styled paragraph

☑ Preserve formatting during updates

 Options...            Cancel        OK
```
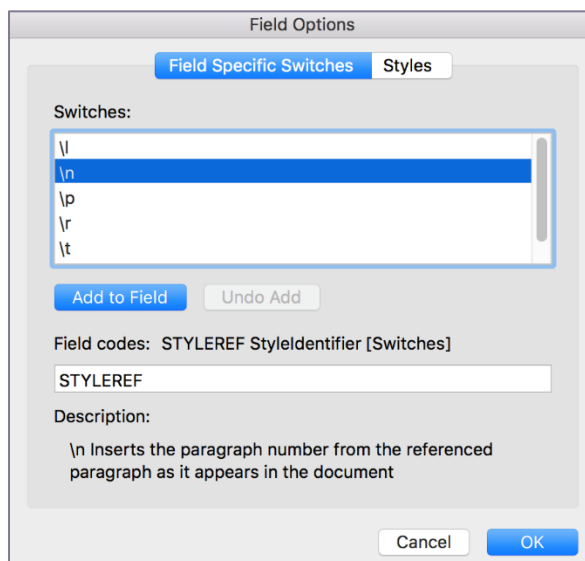
8. This launches the Field Options dialogue box. Ensure that you are looking at the Field Specific Switches tab, as shown below:

9. From the **Switches:** box select **\n** and then click the Add to Field button.

   (The **\n** switch inserts the paragraph number from the reference heading level. In this case the paragraph number is the same as your chapter number)

10. Now select the **Styles** tab and scroll the list until you find Heading 1 (as shown in the image below). Select it and click **Add to Field**.
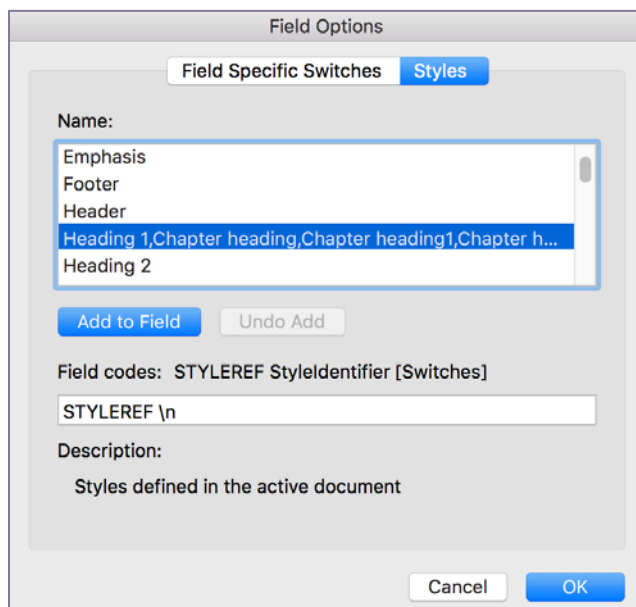

11. Click OK twice to apply the field to your header. Your header should now look like the image below:
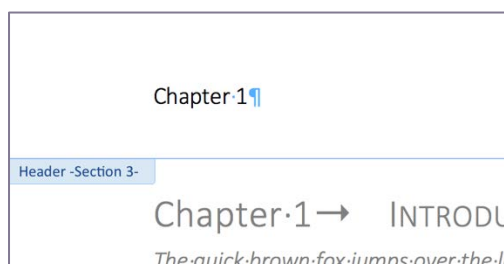
You now need to add the specific text for your chapter to the header.

12. Make sure that your cursor is positioned after *Chapter 1* in your header. Press the spacebar once to create a space.

13. From the **Insert** menu choose **Field…** > **Links and References** > **StyleRef** again

14. Choose the **Options** button

15. Select the **Styles** tab and choose **Heading 1**

16. Choose the **Add to Field** button

17. Click OK twice to apply the field to your header. Your header should now look like the image below:

Chapter·1·Introduction¶

Header -Section 3-

Chapter·1→   INTR(

The·quick·brown·fox·jumps·over·
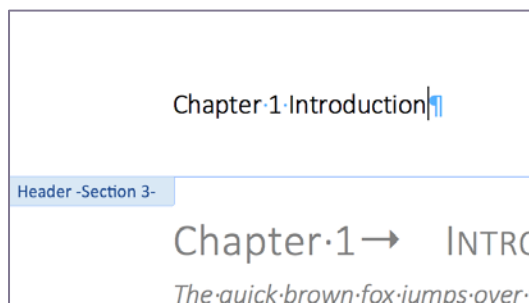
Leave the header open for the next exercise.

Top tip

If headers and footers are linked between sections, changes to the text in one section will be automatically transferred to the linked sections.
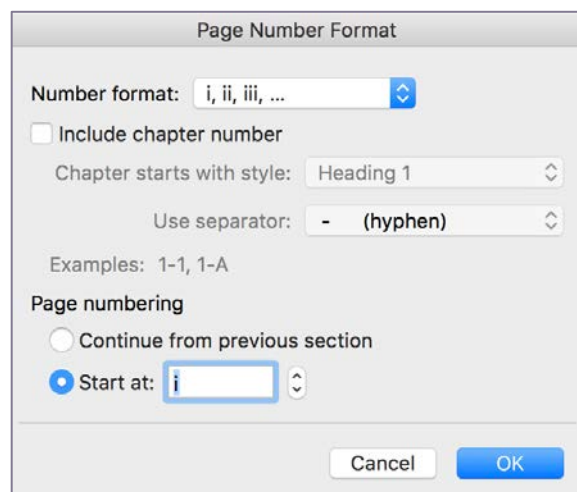
The *Link to Previous* label only appears on a header or footer when there are multiple sections or types of headers/footers.

Creating Thesis Footers

You may require different sections of your dissertation to have no page numbers, or to use Roman numerals (i, ii, iii etc) or Arabic numerals (1, 2, 3 etc). To do this you need to work in the footers of each section individually.

Continue using the previous file with this exercise

1. In the Header and footer tab click on the **Go to Footer** icon
2. Click the **Previous** icon until you are positioned in the footer for Section 1
3. Leave the footer 1 section blank and click **Next**
4. In section 2 footer, turn off **Link to Previous**
5. Click on the **Page Number** icon and choose Page Number
6. Select **Alignment: Centre**
7. The page number will be an Arabic number (2) and starts from 2 (as it's on page 2). However, we want it to be in Roman numerals starting at **i**
8. Double click the newly inserted page number to select it and click on Page Number again and choose **Format Page Numbers**
9. Change Number format to **i, ii, iii** and alter Page numbering to **Start at i.** Click [**OK**]

Page Number Format

Number format: i, ii, iii, …

☐ Include chapter number

Chapter starts with style: Heading 1

Use separator: - (hyphen)

Examples: 1-1, 1-A

Page numbering

◯ Continue from previous section

⦿ Start at: i

Cancel   OK

10. Navigate to Section 3
11. In section 3's footer, turn off **Link to Previous** and format the page numbers as Arabic numerals (1, 2..), starting at 1.
12. Save the file.

Page Numbering on Landscape Pages (Optional)

If you bind a landscape page into your final document, its page number will appear sideways to anyone reading the document. You may wish to position the page number so that it appears in the same position to the reader as all the other page numbers. This explanation only deals with moving the number to correct printing position. However, you may also wish to modify the margins of any landscape pages to ensure that they are consistent with existing portrait pages when printed.

Also, it is a good idea to delete any headers from landscape pages since headers effectively become the left margin of your page when bound.

### Continue using the previous file with this exercise

1. Moving one page number requires section breaks either side of that page.

   The table within the Main Dissertation file (landscape page) already has section breaks inserted either side of it.

2. Go to the **header AND** then the **footer** of this section and **turn off Link to Previous** and *do the same for the following section too.*

3. Return to the landscape page footer. Select the frame of the page number so that it is highlighted (as below).
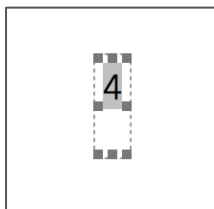
4. **Two finger click the frame border to bring up the menu and choose Format Frame…**

5. In the **Format Frame…** dialogue box set the Height dropdown to *Exactly* as shown below and make a note of the height setting.
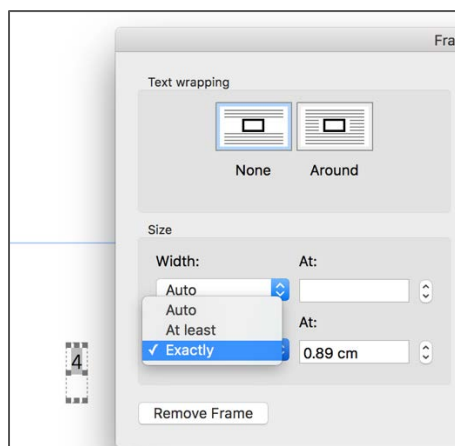
6. You can now **Cancel** the **Format Frame…** dialogue box

7. Delete the page number and close the Header and Footer tab

8. Now select the Insert tab and choose Text Box > Draw vertical text box

9. Draw an approximate sized text box in the left margin next to your table
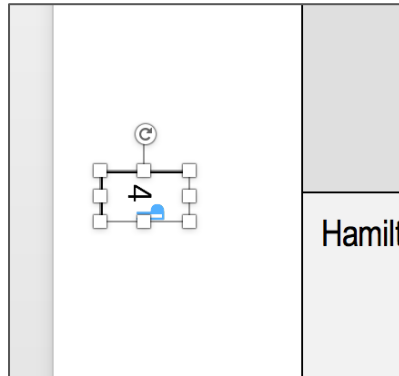
10. To specify the exact dimensions and behaviour of the text box do the following:

    i. Two finger click on the border of the text box and choose More Layout Options

    ii. Select the **Size** tab at the top right of the More Layout Options dialogue box

    iii. Specify a **Width** equal to the *height* discovered in step 5 (in this case 0.89cm)

    iv. Now select the **Position** tab and in the **Vertical > Alignment** drop down choose "**Centred**"

    v. Select OK to confirm

    vi. With the text box still selected, choose the **Shape Format** tab and choose the Shape outline dropdown, selecting "No outline" to hide the border of the text box
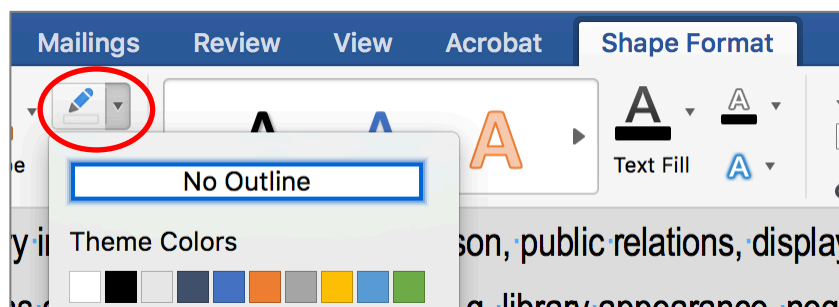
11. Save your file and keep it open for the next exercise
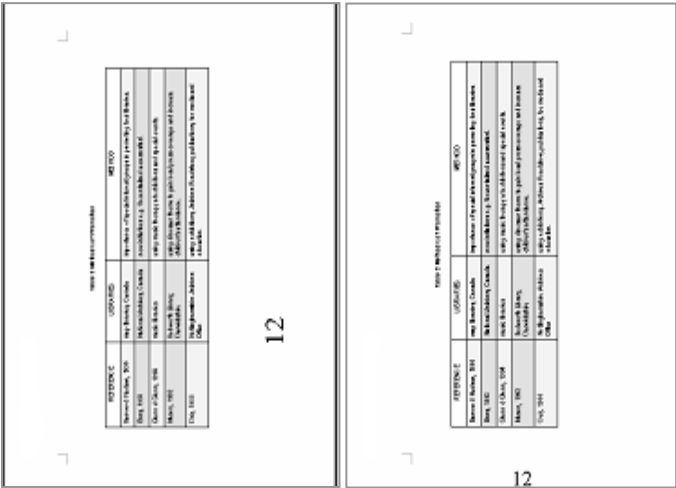
Default positioning of page number on landscape page

Modified position of page number

13 Table of Contents

A table of contents is a list of the headings contained within a document and usually includes the relevant page number, enabling you to quickly locate information. A table of contents typically appears at the front of a document and can be updated at the click of a button when changes are made within the document.

In this session you will:

- gain an understanding of a table of contents
- gain an understanding of the Table of Contents dialog box
- learn how to use the Table of Contents dialog box
- learn how to update page numbers only
- learn how to generate a Table of Figures
- learn how to create headings which will not appear in the table of contents
- learn how to mark a paragraph for inclusion.

Understanding a Table of Contents

A *table of contents* is typically located at the front of a document and presents a list of headings contained within that document, plus a page reference for each heading. The *table of contents* enables a reader to easily navigate a document and is particularly useful in long documents. It can also be automatically updated when changes have been made to the document.

Styles and The Table of Contents

To even begin to understand tables of contents, you need to know that they are built on headings formatted with styles. If you simply type text into a document and apply formatting to the headings (e.g. bold, italics, font effects), but not styles, Word will not identify any text to place in the table of contents.

The easiest way to achieve successful results is to apply Word's built-in Heading styles (*Heading 1* to *Heading 9*) to the headings in your document. The built-in Heading styles offer nine levels of headings and subheadings. You can then choose which of these heading levels you want to include in the table of contents.

Two Means; One End

Word provides two methods for inserting a table of contents into a document: you can use a preset table of contents, which produces an accurate but fairly limited result, or you can create the table of contents using the *Table of Contents* dialog box.

The dialog box is a more advanced method and offers you greater control over the content and appearance of the table of contents. To customise the table of contents (e.g. specify the number of heading levels to use, select an alternate tab leader character, change the style of the text in the table of contents) you will need to use the *Table of Contents* dialog box.

The Table of Contents Dialogue Box

There are many options available in the *Table of Contents* dialog box and it is worthwhile having a closer look at each of the options, to ensure that the workings of the dialog box are clearly understood. It is through the options in this dialog box that you are able to exert control over the content and appearance of the table of contents.
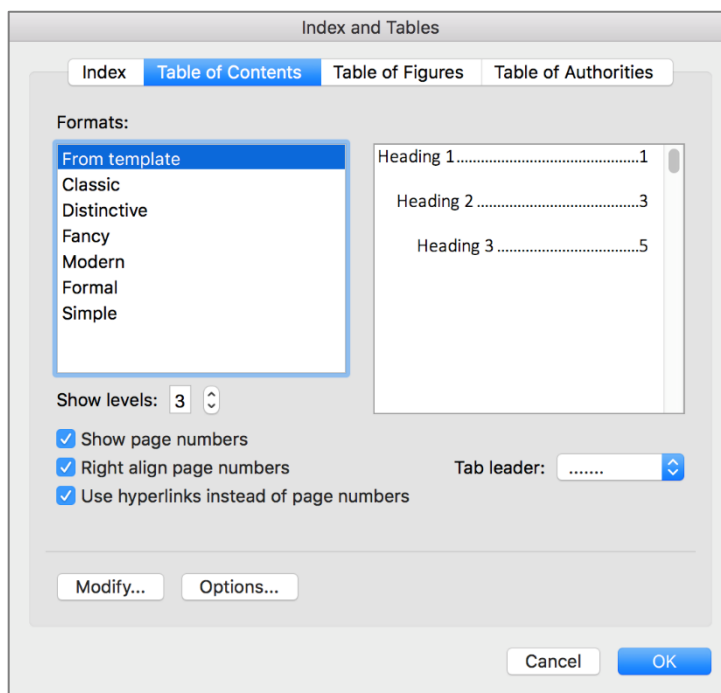
Modify: This displays the Style dialog box, enabling you to format the styles applied to the different heading styles referenced in the table of contents. For example, TOC1 is the style applied to any Heading level 1 text when it appears in your table of contents

Options: This displays a dialog box that enables you to indicate how to build the TOC; whether to use the built-in Heading styles, custom styles, outline levels or fields. Naturally, you can use a combination of all of these options for more complicated and customised documents.

Using the Table of Contents Dialogue Box

There are a couple of different techniques for inserting a table of contents into a Word document. The built-in presets enable you to quickly insert a table of contents based on predefined settings. The *Table of Contents dialog box* however offers you more flexibility and control when inserting a table of contents and inserts it using Word fields.

Continue using your **Main Thesis.docx** file with this exercise

1. Navigate to the Table of Contents page in your thesis document, and insert a new line after the heading
2. Select the **Insert** menu > **Index and Tables…**
3. In the **Formats**: box leave it set to **From template**
4. Notice **Show Levels** is set to **3** by default. This means that if you've used Heading 4-9 styles they won't currently appear in your table of contents. This enables you to selectively leave out more minor headings from your table of contents and avoid cluttering it up in large documents.
5. Click on **Modify**.
6. The different TOC levels represent the way that each heading level is shown in your table of contents. E.g. to make your Chapter headings more prominent in the table of contents you will format the TOC1 entry.
7. Click on TOC1 to select it and then click **Modify**. Change this style to Bold and increase the font size a little. Click [OK] twice to save the changes
8. Click on [OK] again to insert your table of contents

Updating Page Numbers

The great thing about a table of contents in Word, is that you are able to update it to reflect any changes that you make within the document. In a large document, updating the entire table (i.e. headings and page numbers) could be a little slow as all the details are refreshed. Also, you might have modified the text in the table. So, if only the pagination has changed, you have the option to *update the page numbers only*.

Continue using the previous file with this exercise...

1. Place your cursor at the beginning of the heading **Introduction**, this will probably be on the page numbered 1, but don't worry if yours is different
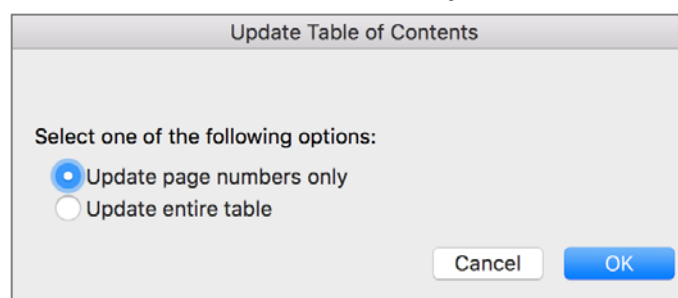
We will now change pagination by inserting a page break...

2. Go to the **Insert** tab and add a page break

The heading Introduction should now appear at the top of the next page, probably page 2. Let's update the TOC...

3. Display the table of contents
**4.** Select the **References** tab and **Update Table**

5. Leave *Update page numbers only* selected and click on [OK]
6. The *Introduction* chapter should now be listed on the correct page

Generating a Table of Figures

In documents containing a number of figures, tables, charts and the like, it might be necessary to provide a list of these objects and the relevant page numbers. Word enables you to construct a *table of figures (TOF)*, generated from captions that have been appended to the various objects within the document. The *table of figures* enables a reader to easily navigate to specific objects.

Continue using the previous file with this exercise...

1. Navigate to your List of Figures page and insert a new line under the heading
2. Select the **Insert** menu > **Index and Tables…** and select the **Table of Figures** heading/tab
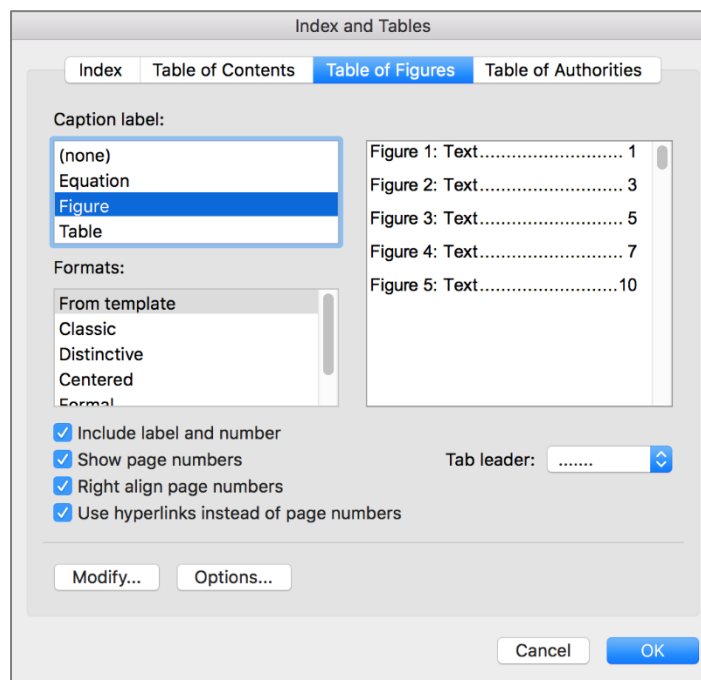
3. If necessary, select **Figure** from the **Caption label:** box
4. Click on [OK] to create the listing
5. Now let's add the table references…
    i. Repeat step 2-4 to insert a List of Tables on the appropriate page.
    ii. In the **Caption label:** box you will need to ensure the label is set to **Table**

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14 Cross Referencing

- Microsoft Word lets you refer to text within the document, such as headings or image captions, by creating cross-references.
- Using Word's Cross Reference tool is a must in large documents. Cross references update automatically if, for example, the page on which a referenced item moves, or the Figure number changes.

Understanding Cross Referencing

A cross-reference is a reference to text or an item that appears in another location in a document. "*See Table 2 for more information*" and "*See the section titled Working With Styles on page 5*" are two examples of cross-references.

Word's cross-reference feature enables you to create cross-references to headings, footnotes, bookmarks, captions, numbered paragraphs, and other items in your Word documents. If an item moves or is modified, the cross-reference can be easily updated to reflect the change. And if you're creating a document that will be read onscreen, you can take advantage of the hyperlink feature to make cross-references clickable hyperlinks to the referenced item.

Cross-referencing Headings

Before you can create cross-references to the headings in your document, you must have applied Word's built-in heading styles to the headings, such as Heading 1, Heading 2 and so on. If you haven't applied the built-in heading styles, the headings will not be listed in the Cross-reference dialog box when you select Heading in Reference type.
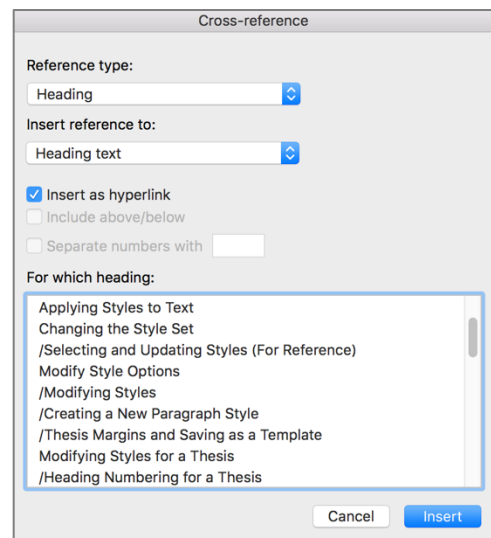
The sample cross-reference shown in the introduction above − *see the section titled Working With Styles on page 5* − actually comprises two cross-references. To create it, you would:

1. Type the text *See the section titled* into your document at the relevant point

2. Create a cross-reference (with *Heading* selected in **Reference type**, *Heading text* selected in **Insert reference to:,** and *Working With Styles* selected in **For which heading**:)

3. Select **Insert** to close the dialog box and add the cross reference field

4. Type **on page** after the inserted fields

5. Create the second cross-reference (same as step 2 except with **Page number** selected in **Insert reference to:**)

Cross-referencing Tables and Figures

Before you can create cross-references to tables and figures in your document, you must first ensure that you have created captions for them (via the References tab). To create the cross-reference, select either Table or Figure in Reference type. If you want the reference to appear similar to 'see Table 1 for more information', select Only label and number in *Insert reference to*. If you want to insert only the table or figure's title in the cross-reference, select Only caption text in *Insert reference to*.

Updating Cross-references

Because cross-references are created as fields, you should update them whenever you alter your document. This ensures that any page references or references to heading names will always be accurate, even if you alter the document's pagination or change a heading.

You can update the cross-references manually by selecting the entire document and pressing ctrl + clicking with the mouse. Choose **Update Field** from the menu.
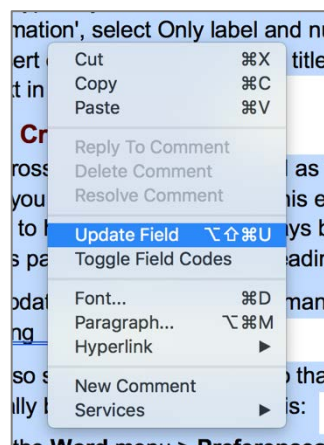
You can also set up your document so that all cross-references will be updated automatically before printing. To do this:

6. Select the **Word** menu > **Preferences…**
7. In the **Output and Sharing** section choose **Print** and tick **Update Fields**

Creating Cross References

A cross-reference refers to text or other content that appears elsewhere in the same document. By default, when you create a cross-reference, it is inserted as a hyperlink. This means that your readers can automatically display the cross-referenced information by following the hyperlink. You can create cross-references to headings, bookmarks, tables, captions, and more.

Before starting this exercise you MUST open the file W750 Cross Referencing_1.docx...

1. Click to the left of the full stop at the end of the second sentence in the paragraph under **Groundwater in the North West** on page 1, insert a space, type *(see* and enter another space.
2. From the **References** tab click on **Cross-reference**
3. Click on the drop arrow for **Reference type** and select **Heading** − all headings will appear in the dialog box
4. Ensure that **Heading text** is selected in **Insert reference to**: and that Insert as hyperlink appears with a tick
5. **Click on Water Quality Classifications For 2007** under **For which heading:**, then click on **[Insert]** and then on **[Close]**
6. Type the closing bracket to complete the cross-reference
7. Hover over and then click the cross-reference to move to the referenced text