
Microsoft Word O365

Level 3: Word for theses for Windows

Practical workbook



Introduction

Is this guide for me?

Microsoft Word O365 Level 3: Word for theses is designed for users who want to learn how to use Word efficiently to write a thesis or similar long document. 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 as part of a tutor-led training course, but it can equally be used for self-paced learning or as a self-help guide.

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What will I learn?

At the completion of 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.

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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>

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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

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.



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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,

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 have specifically changed the location, custom templates that you create in Microsoft Office are stored in a standard **Custom Office Templates** folder (which itself will be found in your **Documents** folder). The reason for this is that when you choose to create a new document based on one of your custom templates (via **New**), Word needs to know where it can locate your templates.

To find out where your templates are located, from the bottom of the **File** menu, click **Options**. On the left choose **Advanced**, scroll down to **General** options and click on **File Locations....** Your templates will reside in the folder specified in **User templates**.

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.

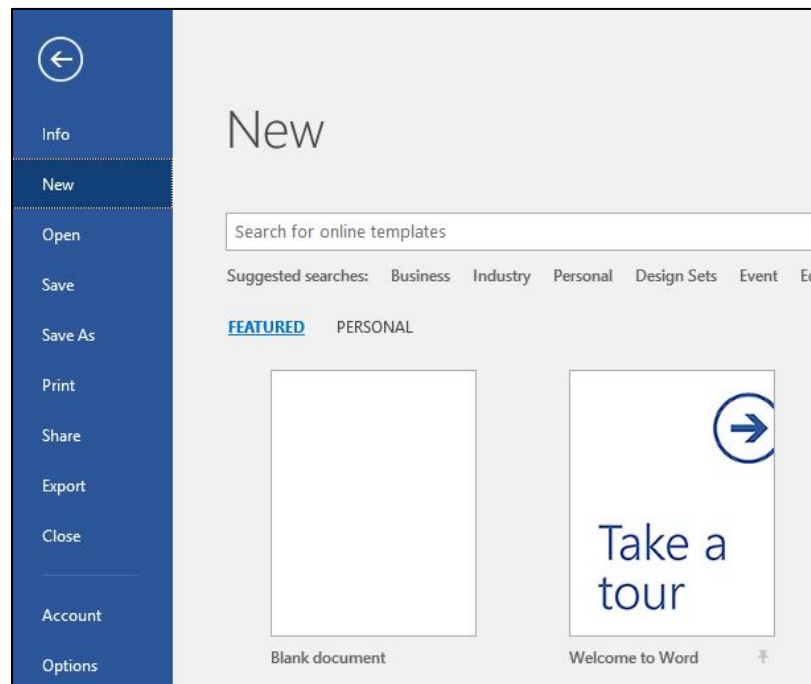


Activity

Try This Yourself:

First, have Word open...

- Click **File** tab and select **New** to see template options
- Under **Featured**, double-click on **Blank document**. We will use this to create a letter template.

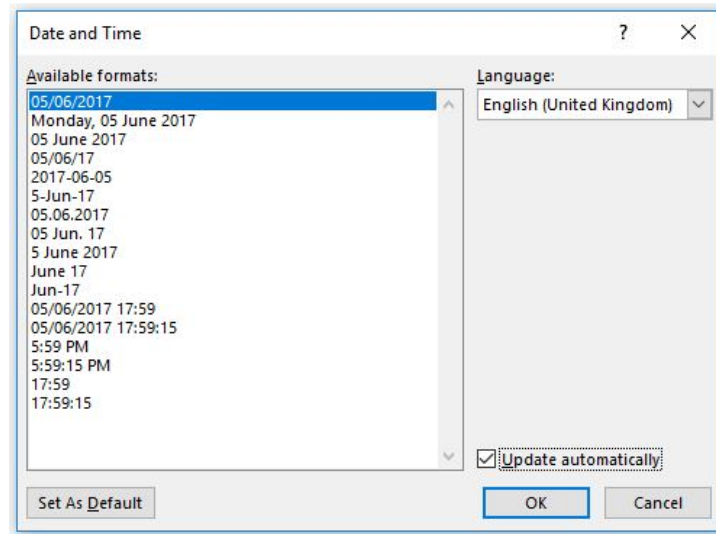


- Turn on the **Show/Hide** button in the **Home** tab > **Paragraph** group, to see paragraph marks and other hidden formatting.



- Type an address, pressing the **Enter** key after each line. As this gives more spacing than needed, we will adjust this:
- Select the whole address, then in the **Home** tab, **Styles** group, change the style from **Normal** to **No Spacing**.
- 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**. 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** then choose the **Browse** button.

Immediately change the file type to Word Template (*.dotx). This automatically directs you to the correct "**Custom Office Templates**" folder for saving templates in Office 2016. 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

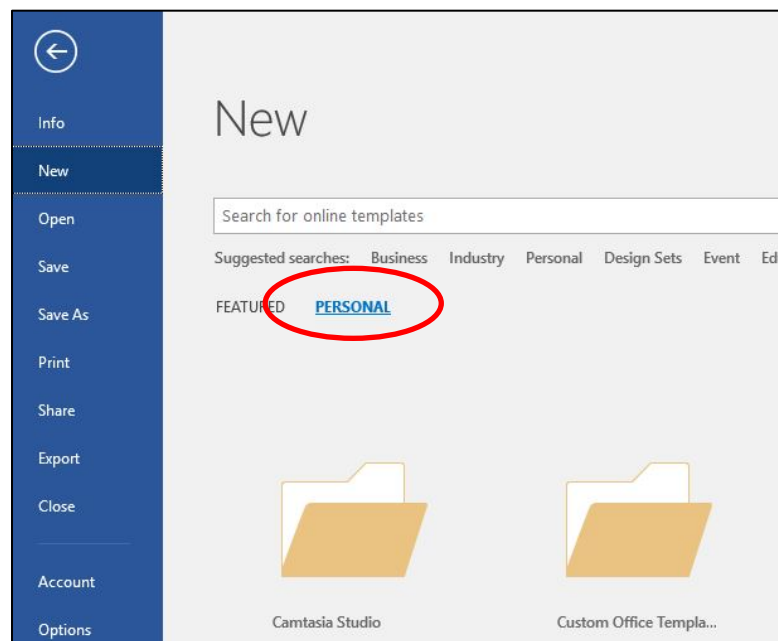
Once you have created a custom template you can use it to create new documents based on it. Any text, styles and formatting that you had included in the template will appear in the new document, ready for you to modify and/or add to. By using custom templates, you will be able to produce similar types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



Activity

To create a new document based on your template:

- Click **File > New** to display required options
- In **Personal** locate your template (this might be labelled **Custom** within the University)



- 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.
- 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.

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

In addition to being able to create a paragraph or character style, you can also specify that a particular style is a **Linked style**, which can be applied either as a paragraph and 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, and a linked style shows both symbols, ¶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.

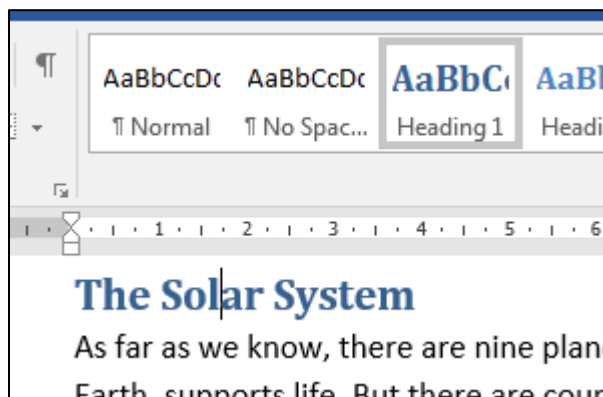
Some examples of styles are **Normal** – this is the default style, and **Heading 1**, **Heading 2** and **Heading 3** – the styles designed to be used for 1st, 2nd and 3rd level headings.



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 **More** button  for **Styles** to open the Styles gallery, then hover over **Heading 2**, then the **Subtitle** style

Notice that as you hover over these styles, the whole heading changes. This is because you are pointing to 'paragraph' or 'linked' styles. If your cursor is positioned in a paragraph but has no text selected, these styles change the whole paragraph (however long or short it is).



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' in Word's terms is from one paragraph mark to the next.

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, then click the drop arrow of the Styles group (if you need to) 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, click on **Options...** in 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 three types of styles: Paragraph, Character and Linked. 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.

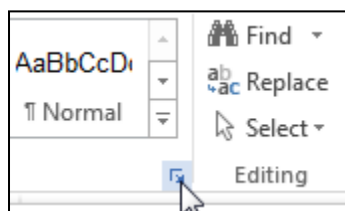


Activity

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, which is a character style and which are linked styles (effectively both a character and paragraph style combined). To make it easier to see, open the Styles pane:

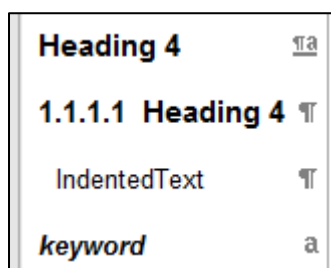
1. In the bottom right corner of the Styles group, click on the Styles pane launcher.



Styles Pane launcher

The Styles pane will appear

2. Using its title bar, drag the Styles pane to the far right or left of your screen (almost off the edge of the screen) and it will lodge itself as a fixed pane on the screen, (visible regardless of which tab you are on).
3. Look to the right of each style name and you will see an icon, (see below) to indicate which type of style it is.



Top tip

Handy to Know...

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

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...

Linked styles are both character and paragraph styles. If you select some text and apply a linked style, only the selected text is changed (as with a character style). If you just click within a paragraph and apply a linked style, the whole paragraph is changed (as with a paragraph style).

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 appropriate for the document that you are creating, and apply the individual styles as you wish from the Quick Styles gallery.



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, click the dropdown arrow
3. Hover over the style set names, such as Basic (simple), etc.
4. Live Preview will show how your document would appear if that style set was selected
5. Click on the Style Set **Shaded** to apply it
6. Notice that the various heading levels and styles applied earlier have been retained, but now have different formatting according to the style set
7. Click the Style Set dropdown button again. Click on and select **Reset to the Default Style Set** at the bottom of the list
8. This option resets the style set to the one applied when the document was last saved...



Top tip

Handy to Know...

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

You can change just the colours – this will retain the underlying styles and fonts
- or just the fonts, while retaining the styles and colours.



Context

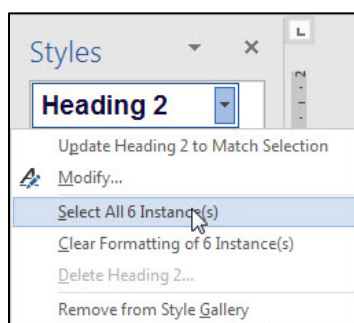
Selecting and Updating Styles (For Reference)

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** 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 style name 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 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 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 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

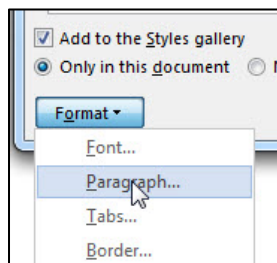
Continue using **Planets.docx** practice file with this exercise...

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, right click on Heading 2 style in either the Styles gallery on the Home tab or in the Styles dialog box, and choose **Modify**
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 (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 (and wish to set more details than can be specified by preformatting text and then creating a style from it) you can use the **New Style** button, at the bottom 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



New Style button

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**

Create New Style from Formatting

Properties

Name: Indented Quote

Style type: Paragraph

Style based on: Normal

Style for following paragraph: Normal

Formatting

Cambria 10 B I U [Background Color]

[List Icons]

Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph
 Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph Previous Paragraph
Still in the New Style box, click Format > Paragraph... to set:

Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph Following Paragraph
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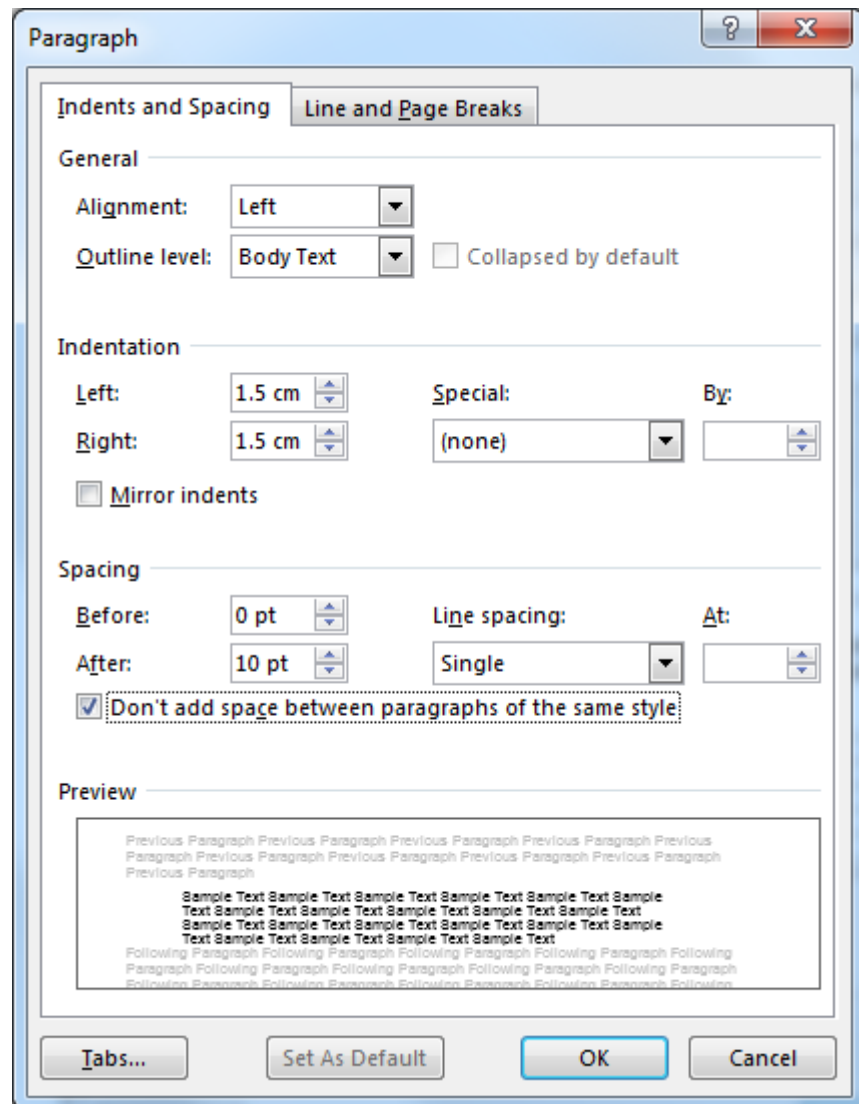
Font: Cambria, Italic, Style: Show in the Styles gallery
 Based on: Normal
 Following style: Normal

☒ Add to the Styles gallery ☐ Automatically update
☒ Only in this document ☐ New documents based on this template

Format OK Cancel

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.

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 Templates 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, and the files brought together at the end.

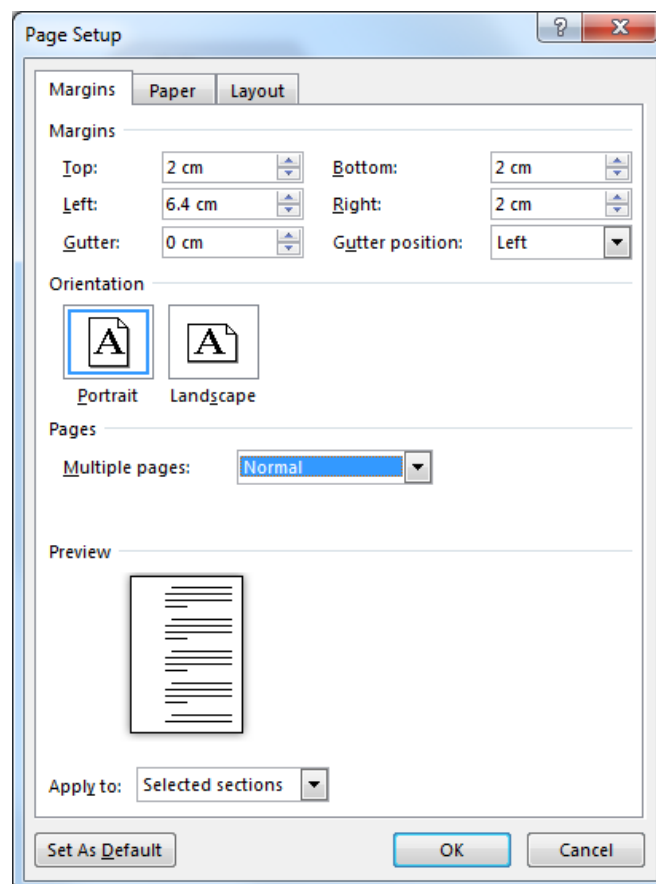


Activity

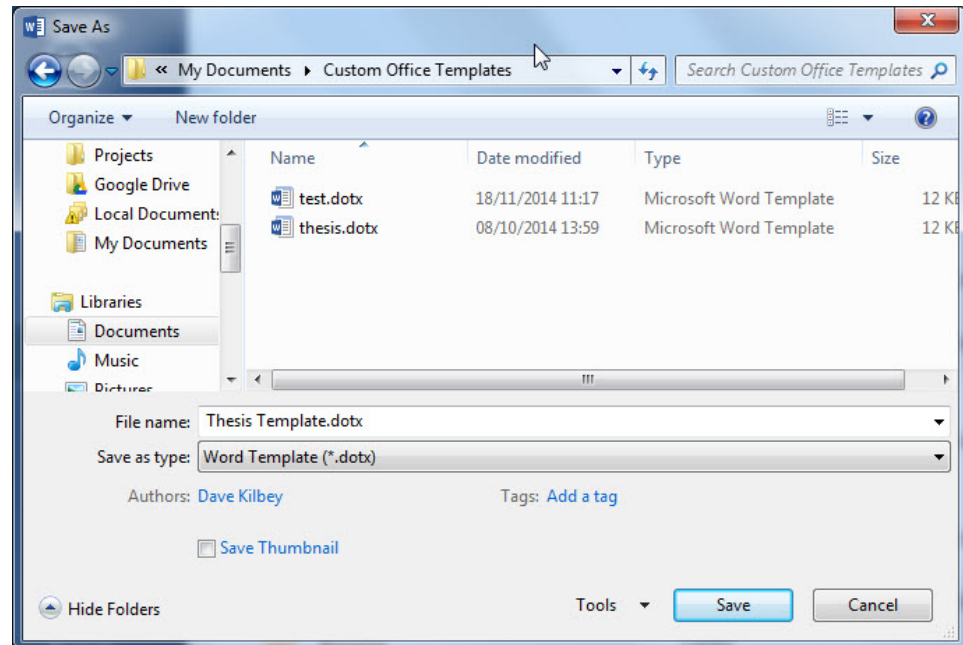
Start with a new blank document on screen...

To set the margins for double-sided printing:

1. Go to the **Layout** tab.
2. In the **Page Setup** group click **Margins** and then choose **Custom Margins**
3. Change the option for Multiple pages to 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** and select the Browse button
8. Immediately change the file type to **Word Template (*.dotx)**. This directs you to the correct “Custom Office Templates” folder for saving templates in Office 2016.
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

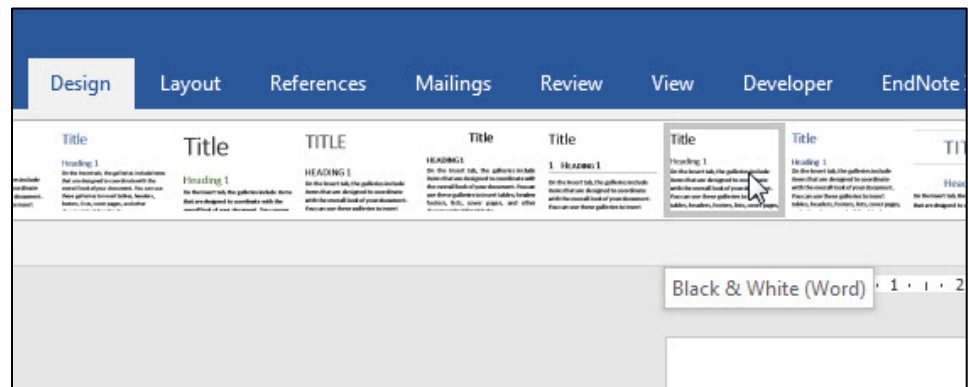
Text in a thesis is normally in double or 1.5 line spacing with a font size chosen to ensure clarity and legibility of all parts of the text. In this task we add Styles to the template that can be used as a basis to create each chapter of your thesis. Regarding fonts and formatting, remember to also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



Activity

Continue in your Thesis template for this exercise

1. Click on the **Design** tab and set the **Style Set** to be **Black and White (Word)**. (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 8th 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



Context

Heading Numbering for a Thesis

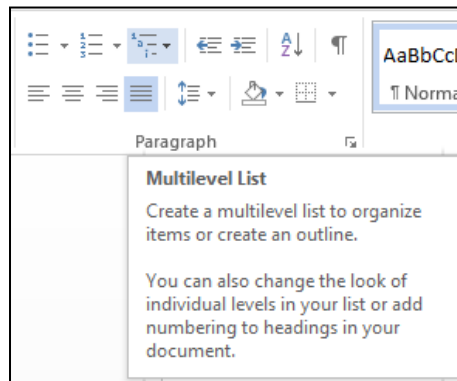
It is helpful in a thesis to have heading numbering which clearly distinguishes between different chapters or sections. In this task, changes are initially made to Heading 1 style, and these also automatically affect Heading 2 - Heading 9 styles. Whilst most style changes can be made in the Modify Styles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

Continue in your Thesis Template for this exercise...

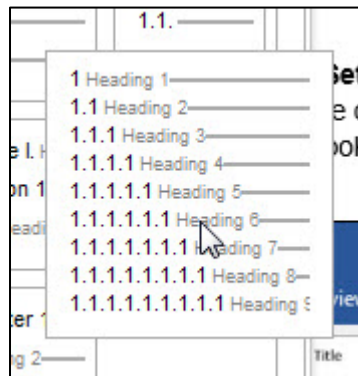
Adjusting the heading numbering affects all the heading styles, but (surprisingly) this change isn't made from the Modify Styles box.

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

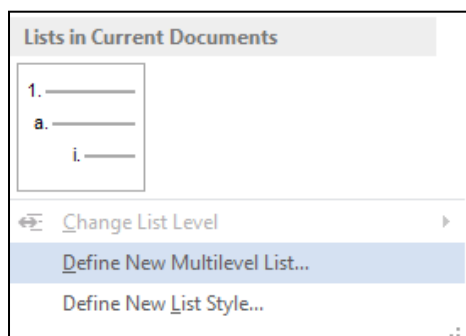
It is helpful to clearly distinguish each chapter by its numbering. In this task a further change is made to **Heading 1** style to add the word '**Chapter**' to it, so that if Heading 1 level is reserved only for starting each chapter, its title will automatically start with **Chapter 1, Chapter 2,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



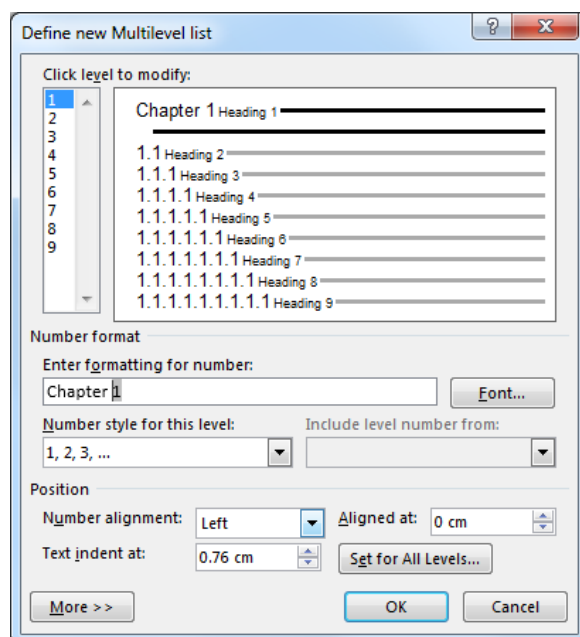
Activity

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**



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** and select the **Custom** tab (on some PCs this may appear as **Personal**)
2. Select your Thesis template and click **OK** to create a new document based on it. The file looks the same, but check the title bar at the top of the screen says *Document #*
3. Type the heading **Introduction** and make it **Heading 1** style. It should now read **Chapter 1 Introduction**
4. Start a new line and type `=rand ()` and press Enter.
3 paragraphs of random text should appear. This is a code for generating some 'dummy' text to work with
5. Apply **Quote** style to the first of these paragraphs
6. 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

Video provides a powerful way to help you prove your point. To embed an Online Video, you can paste in the embed code for the video. You can also type a keyword to search online for the video to add to your document.

1.1 Background Information

To make your document look professionally produced, Word provides a matching cover page, header, and sidebar. Click Insert and choose the design you want from the different galleries.

1.1.1 Preliminary Research

Themes and styles also help keep your document coordinated. To change the look of your document, click the Design tab and choose a new Theme, the pictures, charts, and SmartArt graphics. When you apply styles, your headings change to match the new theme.

7. Save the file in **Documents** as *Introduction.docx* and close the file.
8. Please keep to the filenames and locations given, as these will be referred to later.



If you cannot see the next heading level in the **Styles** pane, click **Options...** (bottom right). Under **Select how built-in style names are shown**, tick **Show next heading when previous level is used**.

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

Chapter 1 Rationale

1.1 Reason 1

1.2 Reason 2

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 **New documents based on this template**. This will allow you to save these changes to the template for future documents that you create based on this template
Note: documents already created based on this template will not yet include this update, but we will change this in the next task
9. Click **OK** and then save the new chapter in *Documents* folder with the filename *Rationale*.
10. When prompted '**Do you also want to save changes to the document template?**' choose **Yes**
11. 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.

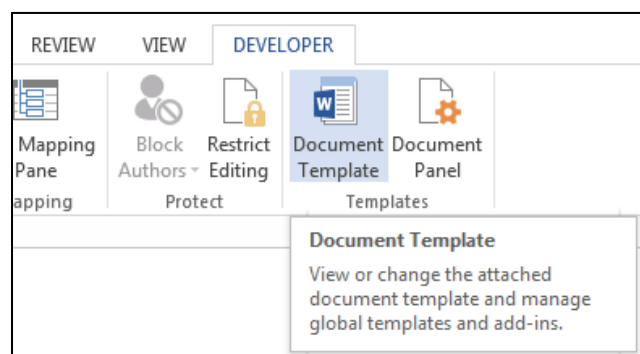


Activity

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. For this task we need to use a special tab called **Developer**. To show this (if not already in the ribbon) click **File > Options > Customize Ribbon**
2. In the right-hand column under **Main Tabs** tick the box for **Developer** and **OK** – the tab will appear in the ribbon
3. Click the Developer tab, then click on Document Template in the Templates group to open the Templates and Add-ins dialog box



4. 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
5. 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
6. Click **OK**.
7. Check that **Heading 1** style has been updated to now include a border
8. 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. On the **Developer** tab, click on Document Template to open the Templates and Add-ins dialog box

Let's now attach a new and different template that includes some of the same style names...

2. Click on **Attach** to open the **Attach Template** dialog box
3. Navigate to the **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 **Picture** in the **Illustrations** group on the **Insert** tab. Pictures are inserted wherever the insertion point is placed, 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, 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 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** in the Illustrations group
4. The Insert Picture dialog box will be displayed.
5. Navigate to the course files folder
6. Select **W732 Wheat 1.jpg**
7. then click on **Insert**
8. If you wish to resize the picture to make it smaller, remember to use a corner handle to maintain proportions.
9. In a similar way, after the heading Disease Research insert the picture **W732 Wheat 2.jpg**



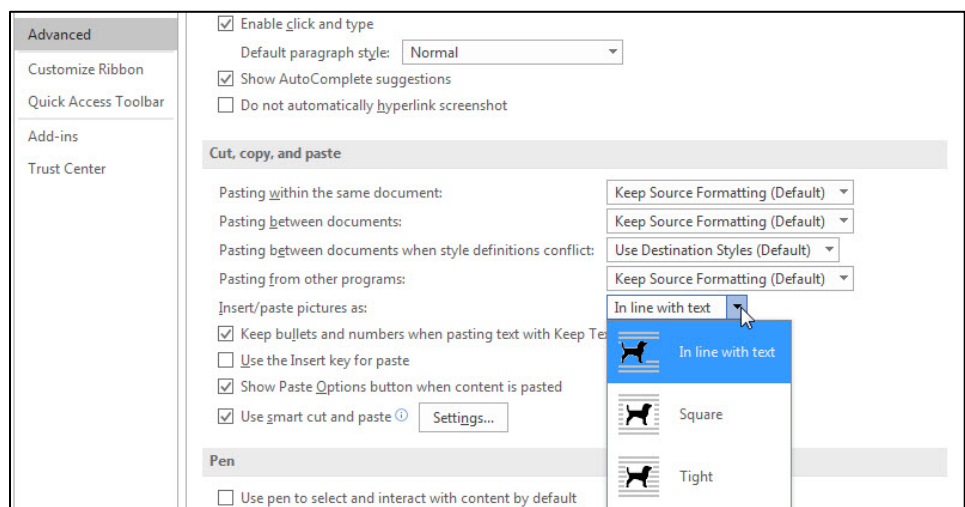
We will now make this into another 'chapter' of the thesis:

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 **File > Word Options > Advanced > Cut, copy and paste 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.



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** button and tick the box Include chapter number.
Notice that the Chapter starts with style box says Heading 1. Leave 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.

A style called **Caption** appears in your list of styles. To change the way a caption looks, alter the settings of the Caption style.

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. 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!



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 **Ctrl + X** to cut the selected information
Let's now move it to page 1
3. Press **Ctrl + Home** then click to the left of the second paragraph starting: As you can see...
4. Press **Ctrl + V** to paste the information here
Notice that the caption has not been renumbered
5. Press **Ctrl + A** to select the entire document
6. Right-click on the document 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 you may have to access the Caption style via the **Styles** dialog box, 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.



Activity

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 After** a paragraph is **0**.
2. Create a **Picture** style, or adjust the built-in 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.

8

Section Breaks



Context

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



Context

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, Paragraph group click on the Show/Hide icon (**Shift+Ctrl+8**). This enables you to see section and page breaks clearly

| REFERENCE [¶] | ITEMS COVERED [¶] |
|---|--|
| Bakewell, 1990 [¶] | Discusses examples including [¶] library image, inter-departmental liaison, public relations, displays, business cards, publications. [¶] Warns against bad public relations e.g. library appearance, negative impressions created by staff, bad material. [¶] Stresses importance of user education. [¶] |
| Hamilton, 1990 [¶] | Gives advice on publicity and marketing libraries. [¶] looks at promotional priorities of particular types of library, describes how to implement these. [¶] Includes: user profiles, newsletters, leaflets and brochures, audio-visual materials, use of computers |
| Stokes, 1997 [¶] | Discusses in detail various standard promotional methods. [¶] |
| Usherwood, 1981 [¶] | Discusses promotional communication by identifying 'audience factors' e.g. user motivation, user interest with particular communication media. This ensures that promotional activities relate to appropriate users. |
| [¶] <div style="text-align: center;">Page Break</div> | |

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 the **Page Layout** tab, then click on **Breaks** in the Page Setup group and select **Next Page**.
5. Insert another next page section break after the table
6. Click in the table. On the Page 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 | |
|--------------------------------|---------------|
| <u>F</u> ormatted Page Number | 49 |
| <u>S</u> ection | 6 |
| ✓ <u>P</u> age Number | Page 49 of 51 |
| <u>V</u> ertical Page Position | 21.7 cm |



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

Title Page Section Break (Next Page)

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

If you have concerns about earlier tasks you can insert the practice files Introduction, Rationale, Wheat and Lit Review in place of those you have created.

1. Place your cursor where you want to insert the file, then click on the **Insert** tab. Click on the drop arrow next to Object in the Text group and choose **Text from File...**
2. Browse to **Documents** and double click on your **Introduction** file to insert it
3. Repeat steps 1 and 2 to insert your Rationale, Wheat and Lit Review files
4. Notice that your captions, with chapter numbers, are now wrongly numbered. To correct them, hold down **CTRL** and press **A** to select the whole document, then press **F9** to update all fields ("fields" are codes that enter information automatically) at once
5. 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

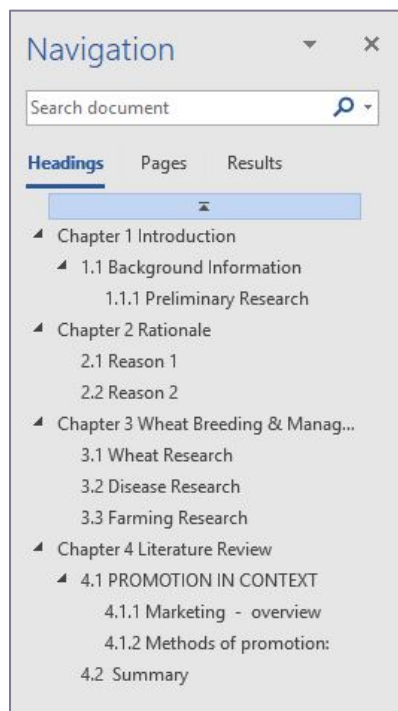
When creating or working in larger Word documents, navigation may get a bit tedious and time-consuming. The Document Map is a navigational pane that can be displayed in addition to, and alongside, the main document window and presents a list of document headings. This summarised view enables you to move 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 click on **Navigation Pane** in the Show group until it appears with a tick
3. A narrow pane is displayed to the left, listing the document headings.
4. Click on *3.1 Wheat Research* in the Navigation Pane
The insertion point will be moved to that position in the document...
5. Click on *3.3 Farming Research* to jump to that heading
6. Click on *Chapter 1 Introduction* to return to the top of the document
7. In the Navigation side pane click on **PAGES** to see a thumbnail view of your 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**

The file has opened in Outline View. This view can be reached from the View tab by clicking on Outline in the Document Views group

1. Click on the drop arrow for **Show Level** in the Outline Tools group, 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.

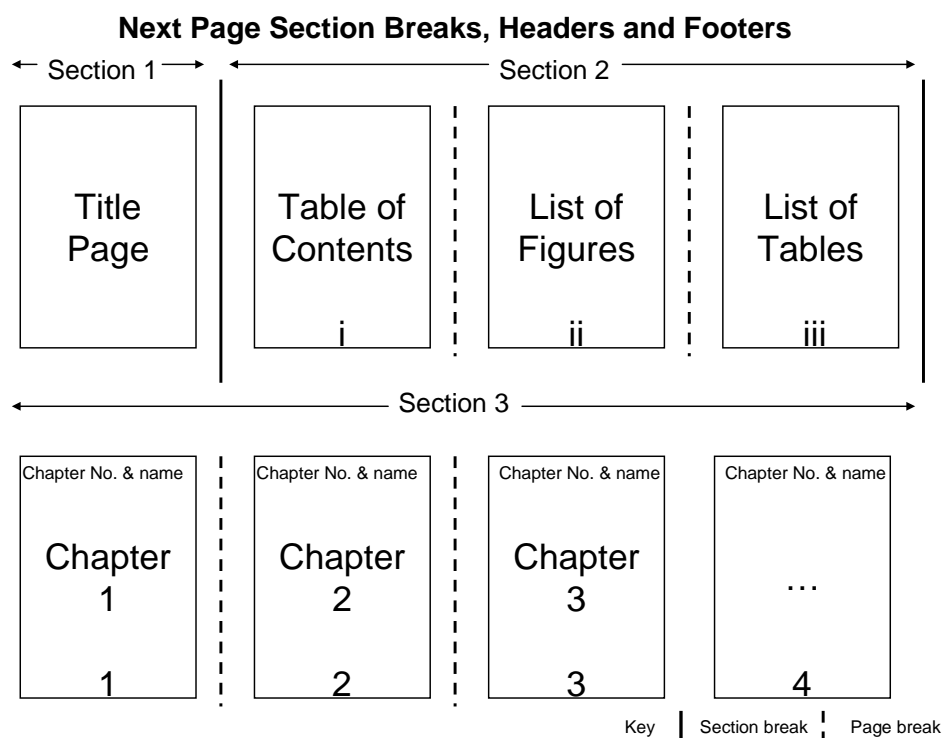
Headers and Footers in Longer Documents



Context

In documents with only a few pages, creating headers and footers is typically a 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 to 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 varied headers and footers. This might arise in your document if you want a title page, some introductory pages (eg a Contents page etc) and several chapters. 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.



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



Context

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



Activity

Continue using your **Main Thesis** document.

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 Page Layout tab)
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

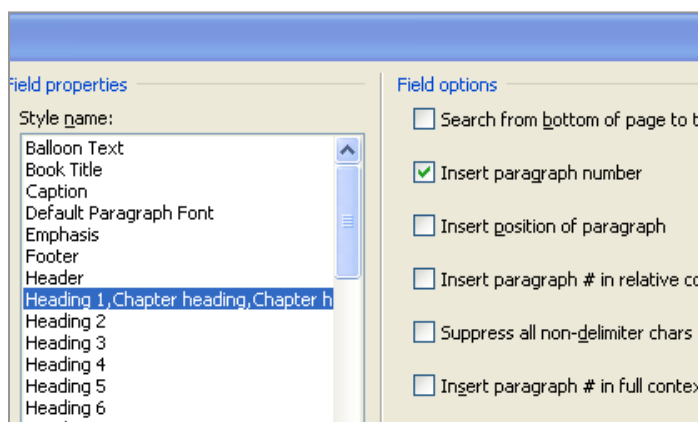
Whilst the title page and introductory pages of a dissertation may need no header, it is helpful for the chapters to have headers which are linked to the chapter name and number. To do this, codes will be added, called **Fields**, to automatically insert the correct chapter number and name in the header.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



Activity

Continue using the previous file with this exercise

1. Double click in the header space on page 1 to open the Header & Footer Tools on the **Design** 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** tab, **Text group**, click on **Quick Parts** & choose **Field**
5. Under **Field names**, scroll down and click on **StyleRef**
6. Under **Field properties** and **Field options** choose those as shown below and click [OK]



7. Press space, then repeat steps 5 and 6 then choose Heading 1 in the Field properties. **Leave Field Options blank** and click [OK] to insert the chapter name
8. Check chapters 2 and 3 headers are correct (should say Chapter 2, 3 etc).
9. Save the file



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



Context

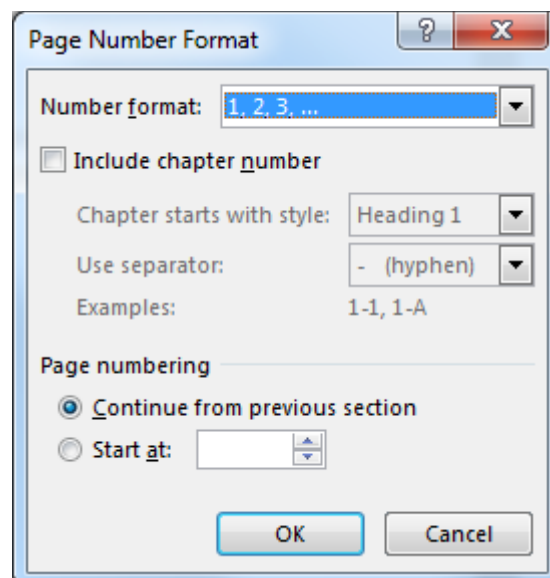
You may require different sections of your dissertation to have no page numbers, or to use Roman numerals (i, ii, iii etc) or Arabic numerals (1, 2, 3 etc). To do this you need to work in the footers of each section individually.



Activity

Continue using the previous file with this exercise

1. On the Header and footer Tools Design tab, in the Navigation Group, click on **Go to Footer**
2. Leave the footer 1 section blank and click Next Section
3. In section 2 footer, turn off **Link to Previous**
4. Click on **Page Number** in the Header & Footer group and from Bottom of Page choose Plain Number 2, to insert a centred page number
5. 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
6. With your cursor next to the page number, click on Page Number again and choose **Format Page Numbers** (see image below)
7. Change Number format to **i, ii, iii** and alter Page numbering to **Start at i**. Click **[OK]**
8. In section 3's footer, turn off **Link to Previous** and format the page numbers as Arabic numerals (1, 2..), starting at 1.
9. Save the file.



Page Numbering on Landscape Pages (Optional)



Context

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 (see below)



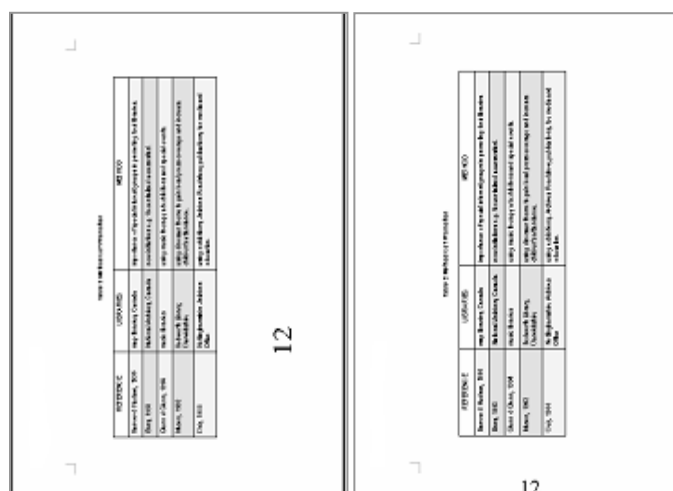
Activity

Continue using the previous file with this exercise

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

Page 9 of your file (landscape page) already has section breaks inserted

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*. If you don't turn off the header and footer links to previous sections, landscape page numbers will be inserted on additional pages
3. Return to the landscape page footer. Delete the page number and stay in the footer
4. In the Header & Footer group click Page Number and then Page Margins, and Large, Left under Plain Number
5. Click the inserted page number – it's in a text box. Select the page number, then on the Format tab of Text Box Tools, click Text Direction once (in the Text group) to change the text orientation
6. Format the page number to match the others, check all are OK, and save



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.



Context

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.

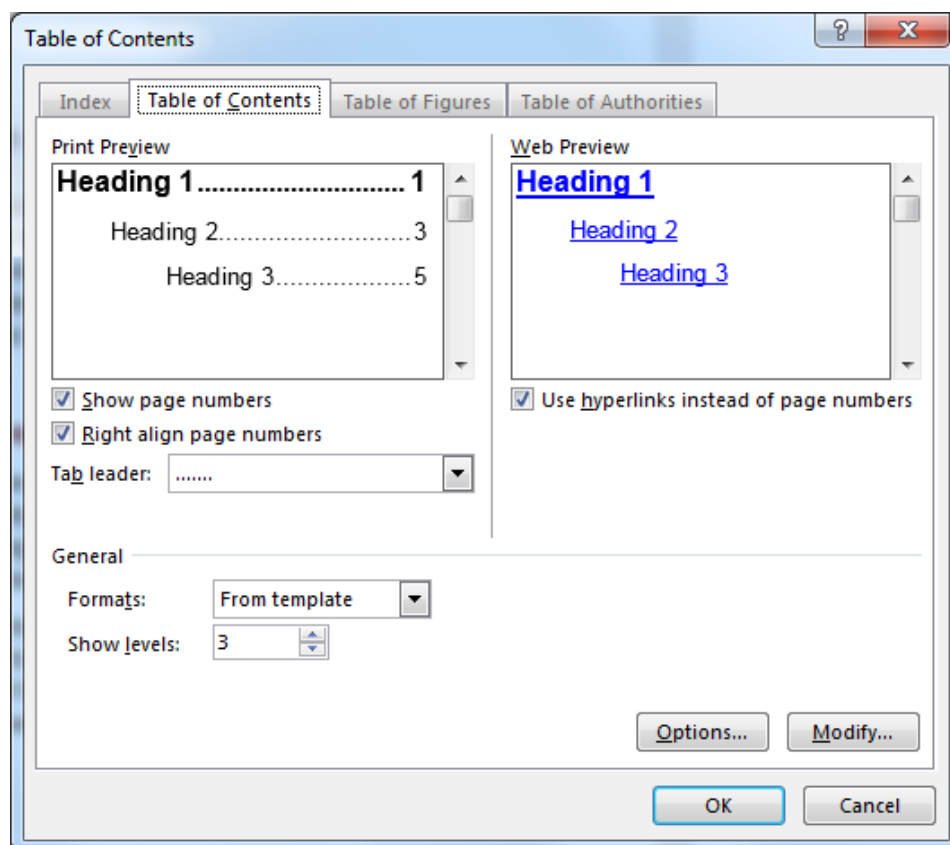
The dialog box is a more advanced method and offers you greater control over the content and appearance of the table of contents. To customise the table of contents (e.g. specify the number of heading levels to use, select an alternate tab leader character, change the style of the text in the table of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



Context

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 those options, to ensure that the workings of the dialog box is clearly understood. It is through the options in this dialog box that the user is able to exert control over the content and appearance of the table of contents. These options are shown below.



Print Preview: This preview image displays how the TOC will appear in the document, as you select from the various options in the dialog box, so that you know what to expect when you click on [OK]. You can select whether to Show page numbers for TOC entries and how to align them; directly behind the text or on the right margin. Additionally, select the Tab leader character to use between the TOC text and the page number - the default is dots, but you can choose from dashes, a solid line or no tab leaders.

Web Preview This preview image enables you to see how the TOC will appear when the document is saved in a format compatible for online display and use. Hyperlinks might prove more practical in an online document than page numbers.

General > Formats: This offers a range of built-in style sets that you can apply to the TOC to quickly change the appearance. Show levels enables you to indicate how many levels of headings and subheadings you want to collect in the TOC (e.g. select 2 to build a TOC using text based on Heading 1 and Heading 2 styles).

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 documents.

Modify: This displays the Style dialog box, enabling you to format the styles used by the table of contents. The different levels of TOC entries are formatted with built-in Word styles: TOC 1, TOC 2, TOC 3 etc. It is these styles that you are able to modify in the Style dialog box.



Context

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.



Activity

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. Ensure that the **References** tab is active, then click on **Table of Contents** in the Table of Contents group to display the menu
3. Select **Insert Table of Contents** to display the Table of Contents dialog box
4. Notice Show Levels in General is set to 3 – we'll leave this as we've only used 3 heading levels
5. Click on **Modify**.
6. The different levels of TOC entries are formatted with built-in Word styles: TOC 1, TOC 2, TOC 3 etc. These styles can be modified to format the styles used by the table of contents.
7. Click on **TOC2** to select it and then click **Modify**. Change this style to **Bold**. Click **[OK]** twice to save the changes
8. Click on **[OK]** again to insert a table of contents based on three levels of headings



Top tip

Using the **Table of Contents** dialog box to generate a TOC enables you to customise every aspect of it, such as the number of levels displayed, text styles, tab leader character and overall format of the table. Word's table of contents presets do not offer this amount of flexibility.



Context

Updating Page Numbers Only

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) might be time-consuming as all the details are refreshed. So, if only the pagination has changed, you have the option to **update the page numbers only**. This also preserves any in-table edits to titles you've made.



Activity

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 note if yours is different
2. We will now change pagination by inserting a page break...
3. Press **Ctrl + Enter** to insert a page break
4. The heading Introduction should now appear at the top of the next page, probably page 2. Let's update the TOC...
5. Press **Ctrl + Home** to go to the top of the document then scroll down to display the table of contents
6. Click on the table of contents to select it
7. *Right click* in the Table of Contents and choose **Update Field**
8. Click on **Update page numbers only** then click on **[OK]**
9. The Introduction chapter is now listed on page 2



Top tip

You can also press **F9** to display the Update Table of Contents dialog box.

The other option in the Update Table of Contents dialog box is **Update entire table**. This updates both page numbers and any changes to headings

Generating a Table of Figures



Context

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.



Activity

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. Ensure that the **References** tab is active then click on **Insert Table of Figures** in the **Captions** group – this will display the Table of Figures dialog box
3. If necessary, click on the **Caption label** dropdown and select **Figure** from the list
4. Click on **[OK]** to create the listing

Now let's add the tables...

5. Repeat step 2-4 to insert a List of Tables on the appropriate page. In the Table of Figures dialog box, you will need to ensure the **Caption label** is set to **Table**
6. Check through and save your completed Thesis document.