

USING MICROSOFT WORD TO CREATE A THESIS (MANAGING LONG DOCUMENTS)



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This manual refers specifically to Microsoft Word version 2003. Other versions of Microsoft Word may require different procedures to achieve the same results. To facilitate this in Office 2007 please use the Microsoft Word Help Files

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Introduction

This guide outlines the main features and functions of Microsoft Word that you will need to use when working with long documents such as dissertations and theses. This is not a basic introductory manual to Microsoft Word, and it is assumed that you will have a thorough working knowledge of the basics of word-processing.

The guide covers a number of areas such as templates, graphics, headers and footers, footnotes, styles, section breaks, table of contents, building an index, document map, master documents and outline view.

Tips for Creating Large Documents

Planning the Document

There are a number of things that you should do before you begin creating the document.

Decide on a general outline for the document. Divide the work into sections and subsections, which could equate to chapters. Use the outline view to plan, organise and reorganise the document as required.

You will need to decide on which printer will be used for the final copy. Prepare a few samples of the text, graphics and illustrations that are to be included and print them as samples. Make sure that any special symbols you must use are printable.

Get confirmation on the required layout of the final document. This would include such things as the font to be used, text to be included in the headers and footers, introductory and declaration pages, specific page layout such as margins and page numbering. You also need to consider the final binding requirements.

Think about and set up some templates and styles that will help keep your work consistent and save time. Any styles will need to be tested.

Developing the Document

Concentrate on the words at first. Don't waste time fiddling with the formatting. If you have to make drastic changes to the document later on then you will have wasted time, which you may not be able to afford.

Use a specialist program such as EndNote to organise your bibliographic references. There are other programs available. You will need to look into the one that suits your needs the best and is also supported by the institution.

Managing the Document

A long document can be managed more effectively if it is split into several files. Try not to have files longer than about 15 – 20 pages.

You may find it more efficient to work on sections separately and combine the files at the end into a Master Document. Doing this at the end will enable you to take advantage of automatic features such as Table of Contents.

File Management and Backups

Have at least three backups. Rotate these and number the backup files accordingly. You could have three diskettes or CDs to hold the backups. Call the first backup file Backup_1 and put it on Disk 1, put the second backup file, Backup_2, on Disk 2 and the third backup file, Backup_3, on Disk 3. What ever you do, use meaningful file names and back up names.

You may find it useful to keep a paper copy of each file. Reprint these at regular intervals. Keep the paper copies in a safe location.

Graphics

Create any pictures and graphics as separate files (appropriately labelled) and keep them together in a folder to be added to the document later. Inserting graphics will greatly increase the file size of a document and will slow you down when working on it.

Insert captions into the document at the appropriate place plus a reminder of which graphic to insert later. You could type in the file name of the graphic and highlight the text in another colour to make it conspicuous (use the Highlight button).

If you are working on a personal computer and have the required applications you can link items such as illustrations and tables from the original program. For example, an Excel chart can be linked directly into a Word document. Whenever the original Excel data is changed the updated chart appears automatically in the document.

Automated features

If you use Styles and Captions in your document you can automatically generate Tables of Contents and Figures.

Only very large documents require an index. Think carefully about whether you actually need one, as it is a big undertaking even when using the automatic index facility.

Timing

It always takes a lot longer than you think! Allow plenty of time for the final formatting and printing.



Working with Long Documents

When documents grow longer and longer, it can become increasingly difficult to see the overall structure. In Outline View you can *collapse* a heading and hide its subheadings and text, and *expand* a collapsed heading to display its subheadings and text. You can also move whole blocks of text around the document very easily in Outline View.

While you can see any Microsoft Word document in outline view by clicking **Outline** on the **View** menu, what you see depends on how the document is formatted. Headings must be formatted with one of the built-in heading styles that come with Word, or paragraphs must be formatted with outline levels. As you rearrange the headings and subheadings in outline view, Word automatically applies built-in heading styles to them.

Using Document Map

The Document Map feature of Word enables you to display an outline list of the headings in the document. This can only be done if the document uses styles to define the headings. The advantage of using Document map is that it enables you to navigate quickly around a document.

To Turn Document Map on

- From the **View** menu select **Document Map**.

or

- Click on the **Document Map button** on the **Toolbar**.



A vertical pane is displayed on the left side of the screen outlining the document structure. You can move quickly to different parts of the document by selecting headings in the document map. Select a heading by clicking on it once. The + and – symbols next to the headings show whether there are further sub headings within a heading or not. Clicking on a + or – will expand or collapse these headings.

To Turn Document Map off

- From the **View** menu select **Document Map**.

or

- Click on the **Document Map button** on the **Toolbar**.

Using New Windows

In addition to Document Map, the **Window** ⇒ **New Window** command provides a means of working in different sections of a document at the same time without losing your place or train of thought. You can switch easily between different sections or chapters of your document, for instance to create cross-references between those sections, and thus greatly increase the connections between different parts of your thesis as a logical argument.

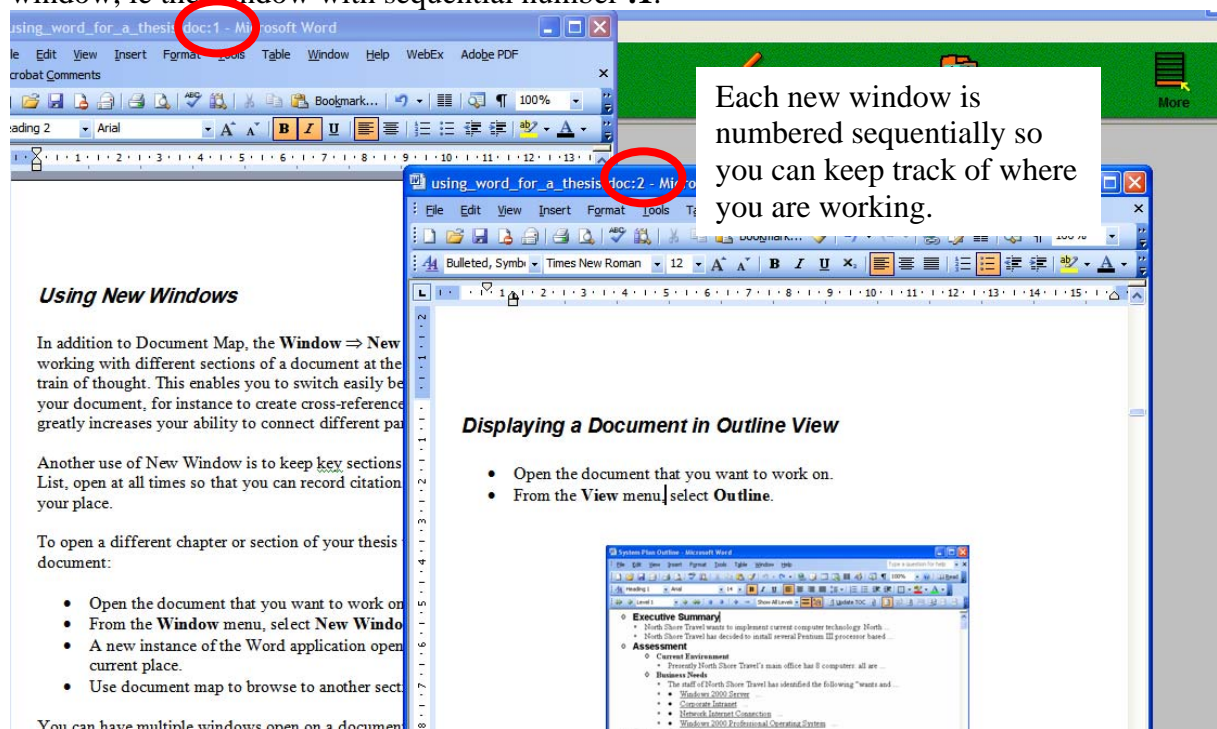
Another use of New Window is to keep key sections of your document, such as the Reference List, open at all times so that you can record citations on the fly as you work, without losing your place.

To open a different chapter or section of your thesis without losing your current place in the document:

- Open the document that you want to work on.
- From the **Window** menu, select **New Window**.
- A new instance of the Word application opens, with the document open at your current place.
- Use document map to browse to another section or chapter.

You can have multiple windows open on a document, enabling you to work simultaneously on a number of different chapters. Each new window is numbered sequentially in the document title bar so that you can easily keep track of which window you are currently viewing.

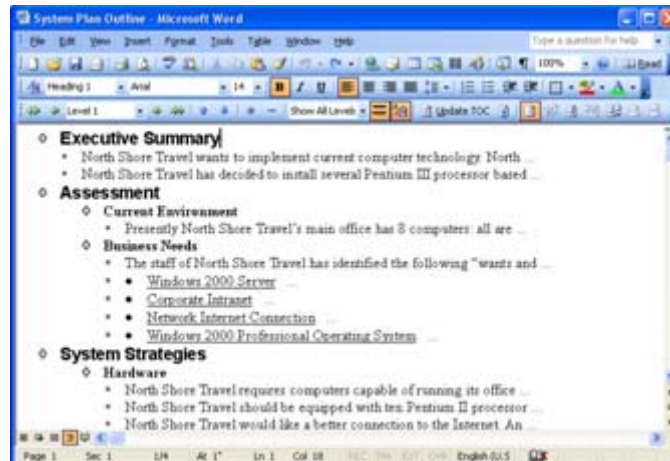
Each New Window is simply a separate view of a document and is not a separate file. As you close windows you are not prompted to save the document until you close the original window, ie the window with sequential number :1.



A two-window view of this document

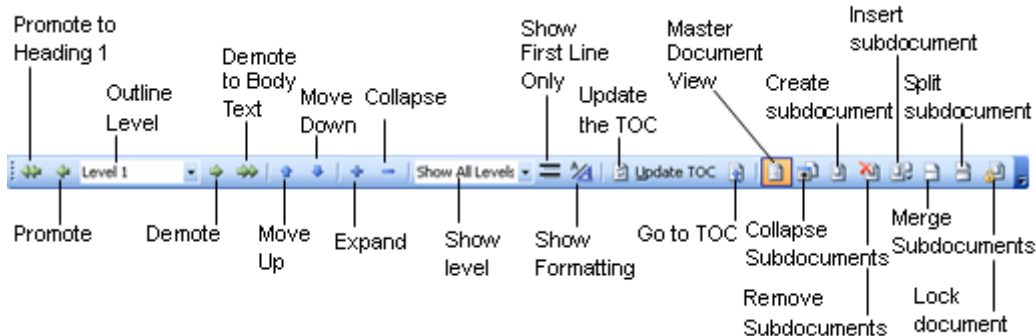
Displaying a Document in Outline View

- Open the document that you want to work on.
- From the **View** menu, select **Outline**.



The document display changes and the Outlining toolbar is opened.

The Outlining Toolbar



Creating a Document in Outline View

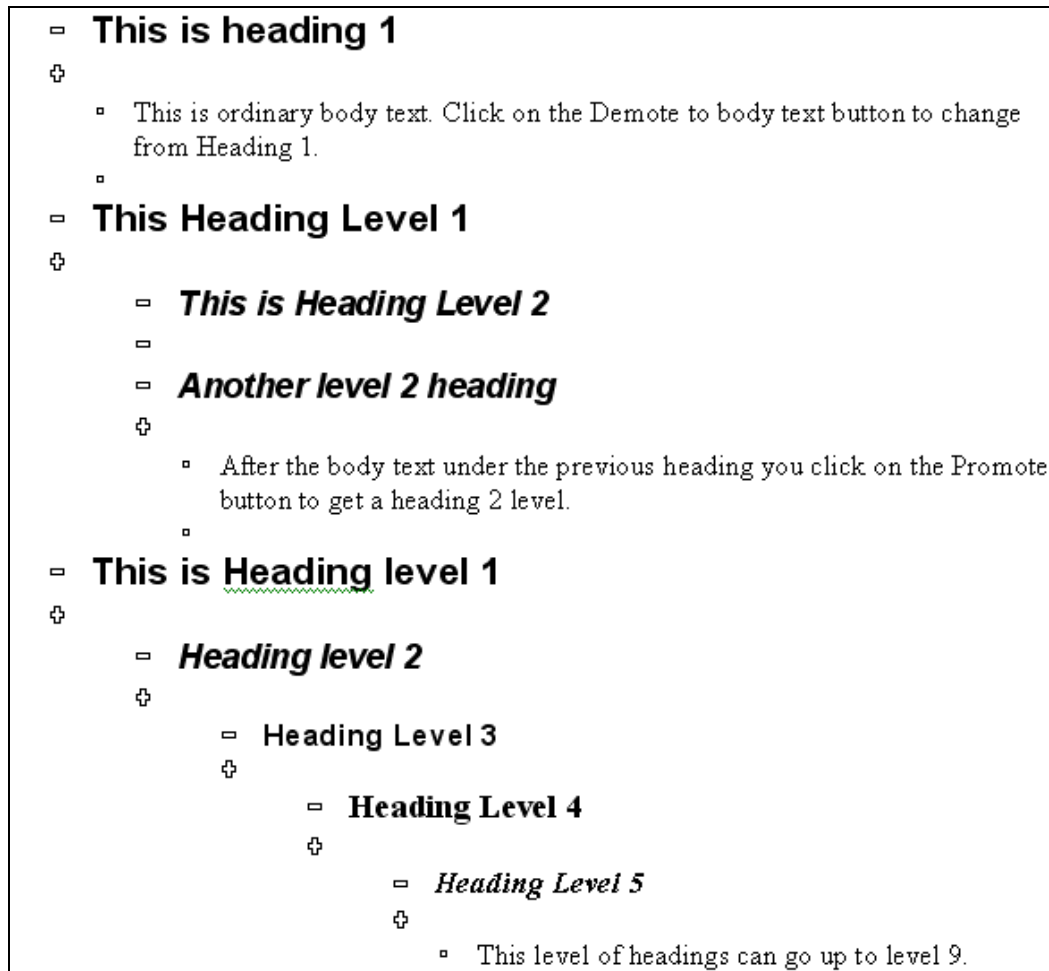
Any new document can be created whilst in outline view. If the document is going to be long, such as a chapter of a thesis or book, then using outline view can save you time and help maintain consistent formatting.

To create a new document in outline view:

- Open a new blank document.
- From the **View Menu**, select **Outline**.

You are now ready to begin entering the text of your document.

- Type the initial heading text, which is automatically formatted using the Heading 1 style.
- Press the **[Enter]** key twice to start the next paragraph. The paragraph will maintain the previous heading level.
- Use the **Promote** or **Demote** buttons to select the next heading level required, or select Demote to Body Text.
- Continue typing the document using the promote and demote buttons for the various headings and body text.



An example of a Document created in Outline

Promoting and Demoting Heading Levels

An advantage of using Outline View is that the Heading Levels can be changed easily. Any heading level can be promoted to a higher level or demoted to a lower level.

To Promote a Heading level:

- Click anywhere in the heading text that is to be promoted.
- On the **Outline Toolbar** click the **Promote** button. (The one with the arrow pointing to the left).

This promotes the heading text to next level higher style. The heading text can be promoted to level one by clicking on the Promote to Level 1 button, which is the button with two arrows pointing to the left.

To Demote a Heading Level:

- Click anywhere in the heading text that is to be demoted.
- On the **Outline Toolbar** click the **demote** button. (The one with the arrow pointing to the right).

This demotes the heading text to next level lower in style. The heading text can be demoted to body text level by clicking on the Demote to Body Text button, which is the button with two arrows pointing to the right.

Collapsing and Expanding Headings

Word enables you to collapse and expand headings. This simply means that the text under each heading will be either hidden or displayed. In long documents you can have all of the headings collapsed, except for the one with the text that you are working on.

To Collapse Headings:

- Click in the heading that you want to collapse.
- Click on the **Collapse** button on the Toolbar, which is the one with the minus sign.

To expand Headings:

- Click in the heading that you want to expand.
- Click on the **Expand** button on the Toolbar, which is the one with the plus sign.

Changing the Order of a Document

Another benefit of working in Outline View is that you can easily modify an outline. You can easily rearrange the topics in an outline by moving the headings and subheadings to different positions and locations in the document. When you move a heading the body text associated with it will be moved as well.

To Change the Order of a Document:

- Position the cursor in the heading that you want to move.
- Use the Move Up and Move Down Arrows on the Outline Toolbar to move the order of the headings and related text.

Master Documents

A large document, such as a thesis or book, is usually made up of a number of smaller documents, such as chapters. Word's Master document feature can be used to combine a number of smaller documents into one, while still maintaining each as a separate file.

A master document is simply a new document into which the multiple smaller documents, known as subdocuments, are added. Working with a master document enables you to:


- Generate a complete table of contents and index.
- Print the multiple subdocuments as one.

To create and manage the master document, a special view called Master Document View is used. It includes an extended outlining toolbar allowing you to further manage the contents of the master document.

When each subdocument is inserted into the master document, the following occurs:

- Section breaks are automatically inserted above and below the subdocuments.
- All styles are maintained. If the master document has styles with the same name as the subdocuments, then Word provides an option to rename the styles in the subdocuments or to apply the styles from the master documents in the subdocuments. Keep in mind that your styles should be consistent.
- All margins, headers and footers within subdocuments will be retained as they are.

You need to be in Outline View to create a master document. Once you're in Outline View, you can easily add and delete subdocuments to and from the master document and move the subdocuments to change their order. You can also open, modify, and print any subdocument from within its master document. Whenever you open a master document, all of the subdocuments open and are displayed in outline view, enabling you to work on all the documents at once.

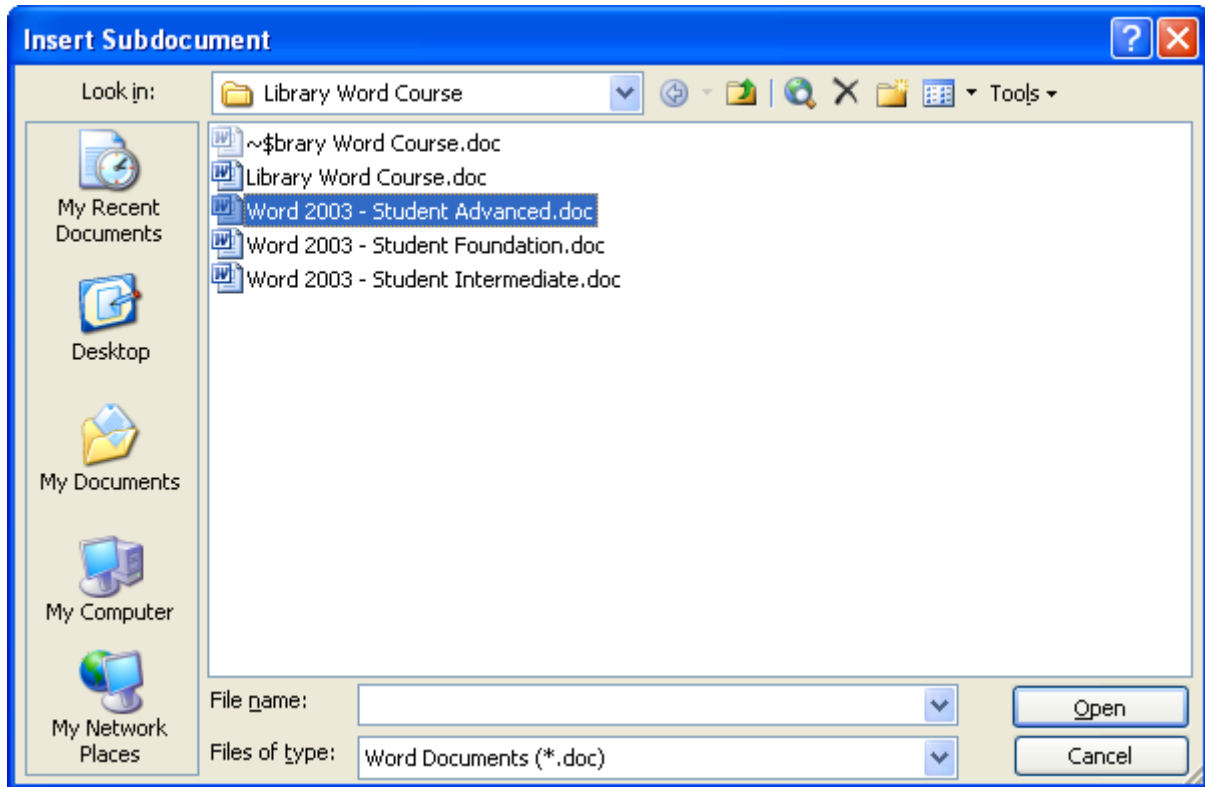
It's important to realize that a subdocument is not actually saved inside of its master document. Instead, a master document contains information on where to find the subdocument file. When you open a master document, all of its subdocuments are closed, or collapsed, by default. You can open a subdocument by clicking its text if the subdocuments are collapsed, or by double-clicking its  subdocument icon when the subdocuments are expanded. You can open all the subdocuments in a master document by print previewing the master document.

Creating a Master Document

The following steps are required in order to create a master document.

- Create a new document in the usual way.
- Add any formatting and text to the document that you require.
- Turn **Outline View** on. Subdocuments can only be inserted in Outline View.

- Turn Master Document View on by clicking on the Master Document View button on the Outline toolbar.
- Click the Insert Subdocument button on the toolbar.



The Insert Subdocument dialog box appears. You need to specify the document you want to insert as a subdocument.

- Select the document and click on **Open**.
- Repeat this process to insert as many subdocuments as required.
- Save the master document in the usual way.

Opening a Subdocument from within a Master Document

- Open the Master document.
- Switch to Outline view and activate Master Document view.
- Double click on the icon beside the link to the subdocument.

Removing a Subdocument from the Master Document

- Open the Master document.
- Switch to Outline view and activate Master Document view.
- Click on the icon beside the link to the subdocument to select it.

- Press the delete key.

Note: this does not delete the subdocument. The original still exists. All it does is remove the subdocument from the master.

Removing a Link to a Subdocument

You can remove a link to a subdocument and retain the content of the subdocument in the master document.

- Open the Master document.
- Switch to Outline view and activate Master Document view.
- Click on the icon beside the link to the subdocument to select it.
- Click on the **Remove Subdocument**.

Note: this does not delete the subdocument. The original still exists. All it does is remove the link to the subdocument from the master and retain the content in the master document.

Section Breaks

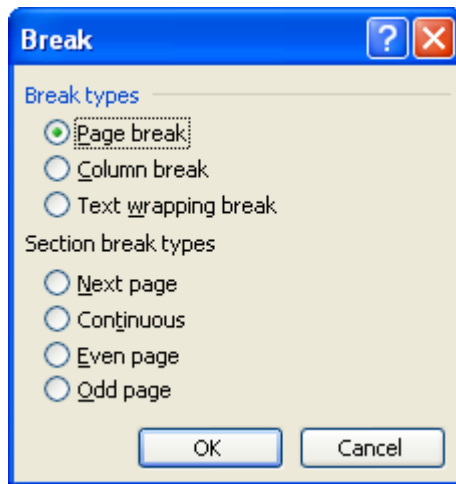
Dividing a Document into Sections

When you begin a new document in Word for Windows the entire document consists of one section. However a document can be divided into as many sections as you like and each section can be formatted differently. A section can be as short as a paragraph or as long as you like. A new section of the document must be created whenever you want to change any of the following features:

- ◆ Paper size, page orientation, margins.
- ◆ Newspaper style columns.
- ◆ Page numbering and vertical alignment.
- ◆ Headers and footers, footnotes and endnotes.

To insert a section break:

- Position the cursor where the section break is to be inserted.
- Click on **Insert**.
- Click on **Break**. The following dialog box will be displayed.



- Select the appropriate type of break and Click on **OK**.

Type of Break	Effect
Next Page	Word for Windows breaks the page at the section break. The new section begins a new page.
Continuous	A section break is inserted but the new section begins on the same page.
Even Page	The new section begins on the next even page.
Odd Page	The new section begins on the next odd numbered page.

Headers and Footers

Headers and footers are text or graphics that appear at the top and bottom of every page in your document. Word allows you to have extensive control over the headers and footers and what goes into them. You can have any text and other elements such as graphics, different headers and footers for odd and even pages, different ones for each section, page numbers, dates, times, file names and paths all entered automatically.

By default, headers and footers are left aligned, and they use whatever font and size is the default in the normal template. Two tabs are set with one in the centre of the header or footer and a right aligned tab on the right margin of the header and footer. If your document has only one section then the header and footer will appear on every page.

Accessing Headers and Footers

To Work With Headers or Footers:

- From the **View** menu select **Header and Footer**.

Word switches to Print layout view (if you're not already there) and displays the header surrounded by non-printing dotted lines that represent its size and location. Word will also display the header and footer toolbar.

If you want to work with footer instead of the header, click on the **Switch between Header and Footer** button on the toolbar. You can also use the **down arrow key** to do the same.

The Header and Footer Tool Bar



Insert AutoText ▾

Enables you to choose from a series of preformatted entries for headers and footers that specify elements such as page numbers, the author's name, date, filename and other information.



Displays the page number on all pages. Displays the number of pages in the entire document. Displays the Page Number format dialogue box.



Inserts a field that displays the current date. Inserts a field that displays the current time.



Displays the Page Setup dialogue box where you can specify different headers and footers for odd and even pages or for the first page.



Toggles between displaying document text in the background (in grey) or showing no text in the background.



Specifies that a header or footer contain the same text as the header or footer in the preceding section.



Switches between displaying the current header or footer. Displays the header or footer associated with the preceding section. Displays the header or footer associated with the next section.



Closes the header or footer pane.

Creating Headers and Footers

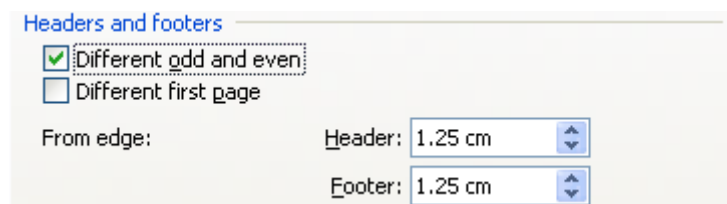
To Create Headers and Footers for Your Document:

- From the **View** menu select **Headers and Footers**.
- Enter the required text, field codes and formatting for the header or footer.
- Click on **Close** to return to the document.

Headers and Footers on Odd and Even Pages

It is not possible to create different headers and footers for odd and even pages unless the document has more than one page. In other words, at least one odd page and one even page.

- From the **View** menu select **Headers and Footers**.
- From the Toolbar click on the **Page Setup** icon.
- In the **Layout** tab click **Different odd and even** on.
- Click on OK.



Word will display the area for the odd header/footer.

- Enter the required text, field codes and formatting for the header or footer.
- To go to the even header/footer click on the **Show Previous** button.

The **Show Previous** and **Show Next** buttons toggle between the odd and even headers and footers.

Headers and Footers for Different Sections

If your document has more than one section Word automatically repeats the header and footer for every section. However this may not be appropriate. Word will allow you to create different headers and footers for each section.

To Create Different Headers and Footers for Different Sections:

- Make sure that the cursor is in the section where the new header/footer is to go.
- From the **View** menu select **Headers and Footers**.
- The Header/footer dialogue box will indicate the section number.

Use the **Show Next** button to navigate to the section for which you want a different header/footer. The header pane for the next section appears and the **Same as Previous** button becomes available on the Toolbar.

- Click on the **Same as Previous** button to turn it off.

This effectively disconnects the header/footer from the one in the previous section.

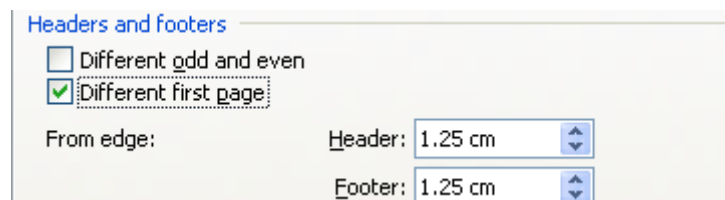
- Change the text as required in the header/footer.
- Click on **Close**.

Different Header and Footer on the First Page of a Document

- From the **View** menu select **Headers and Footers**.
- From the Toolbar click on the **Page Setup** button.
- In the **Layout** tab click **Different first page** on.
- Then click on OK.

Word displays a blank header/footer. If you don't want a header/footer on the first page leave it blank or enter any text, field codes and formatting as required. If you leave it blank there will be no header or footer on the first page of the document.

- Click on **close**.



An Introduction to Graphics

The Microsoft Office package includes a large number of art files. In addition to these you can use art files that are available in other programs or that you have created yourself. Word provides graphics filters which are programs that translate graphics files into a suitable format for inclusion in a Word document. With these graphics filters, you can add art from files in the following formats.

Supported Graphics Formats

- ◆ AutoCAD Format 2-D (DFX)
- ◆ Computer Graphics Metafile (CGM)
- ◆ Corel Draw (CDR)
- ◆ Encapsulated PostScript (EPS)
- ◆ Graphics image format GIF
- ◆ Hewlett-Packard Graphics Language (HGL)
- ◆ JPEG File Interchange Format
- ◆ Kodak Photo CD
- ◆ Micrografx Designer/Draw (DRW)
- ◆ Macintosh PICT (PCT)
- ◆ PC Paintbrush (PCX)
- ◆ Portable Network Graphics
- ◆ Tag Image File Format—TIFF (TIF)
- ◆ Targa (TGA)
- ◆ Windows Bitmap (BMP)
- ◆ Windows Enhanced Metafile
- ◆ Windows Metafile
- ◆ WordPerfect Graphics (WPG)

If you have an art file in a different graphics format, you can't insert it directly into Word. If you have the program that created the art open it in that program and then save it in one of the graphics file formats Word accepts. Alternatively, copy the image to the Clipboard, and then paste the image into your Word document.

Inserting a Graphic

To help you insert art which Word calls **Clip Art**, Word contains an Insert Picture command and an Insert Picture button on the Picture toolbar.

To Insert Clip Art:

- Place the insertion point where you want the graphic to be inserted.
- From the **Insert** menu, select **Picture**, then **Clip Art**.

The Task Pane will be displayed on the right of the screen. Click the go button to display all of the available clip art. When the images are displayed you can click on the one that you want. This will insert the picture at the cursor position.

Formatting a Graphic

All of the graphics you add to a document can have borders and shading, be resized, positioned anywhere on a page or in relation to a paragraph, column, or margin, and all of the art objects can be set up to have text flow around them in various ways. Resizing can be done by cutting off parts of the graphics (cropping) or by changing the size of the picture (scaling).

Adding a Border

- Select the graphic by clicking on it once.
- From the **Format** select **Borders and Shading**.
- Select the border options (colour, size etc) and then click OK.

Sizing a Graphic - Scaling and Cropping

When you insert a graphic, it appears at its full size. Sometimes the size is too large to blend elegantly into the surrounding subject matter. Other times, the size is too small to be seen clearly. Sometimes you might want only part of the graphic. At other times, you might want lots of space around a graphic. To change the size of the image, you scale the graphic. To change the amount of the graphic that appears, or to add space around a graphic, you crop it. To enlarge part of a graphic, crop it to show only that part, and then scale it to the larger size. To scale or crop a graphic, you can use either the mouse or the Format Picture command.















Note: Scaling a small picture to a larger size can cause it to become distorted in the way television news programs hide people's faces. If this happens then you need to use a specialist graphics program like Photoshop to work on the graphic before using it in a Word document.

Scaling and Cropping with the Mouse:

- Select the graphic by clicking on it once.

- To scale a graphic, drag any one of the sizing handles. Dragging the sizing handle toward the centre of the graphic scales it down (decreases the size of the image). Dragging the sizing handle away from the centre of the graphic scales it up (increases the size of the image).
- Drag one of the corner sizing handles if you want to maintain the proportion between the graphic's height and width. If you drag using a sizing handle that's not on one of the corners, you'll distort the picture as you resize it.
- To crop a graphic, click the Crop button on the Picture toolbar, drag a sizing handle, and then, when you're done cropping, click the Crop button again. When you drag toward the centre of the graphic, you cut off part of the image. When you drag away from the centre of the graphic, you add white space along that edge of the image.

The Picture Toolbar

Button	Function	Button	Function
	Insert Picture		Rotate Left 90 ⁰
	Image Control		Line Style
	More Contrast		Compress Pictures
	Less Contrast		Text Wrapping
	More Brightness		Format Picture
	Less Brightness		Set Transparent Colour
	Crop		Reset Picture

Positioning a Graphic

When you put a picture in your document, it's located at the insertion point you set before you choose the Insert command. After the picture is in place, you can change its position with either the mouse or with the Format command.

To Move a Graphic with the Mouse:

- Select the graphic by clicking on it once.
- Position the mouse pointer inside the graphic.
- Click down and drag it to the required position.

Adding Captions

Charts, tables, graphics and equations should appear with captions that number and explain them. This is especially important if you have lots of them in long publications and if you refer to them in the text of your document. Adding captions will also make it easier to generate lists of them, much like a table of contents.

Captions in your publications will look similar to the following examples:

Figure 1: Rainfall January to June 2000

Table 1: Rainfall Data Jan - Jun 2000

Equation 1: Average Daily Rainfall Jan - Jun 2000

Adding Captions in Documents

- Select the object that is to have a caption attached to it.
- From the **Insert** menu, select **Reference** then **Caption**.



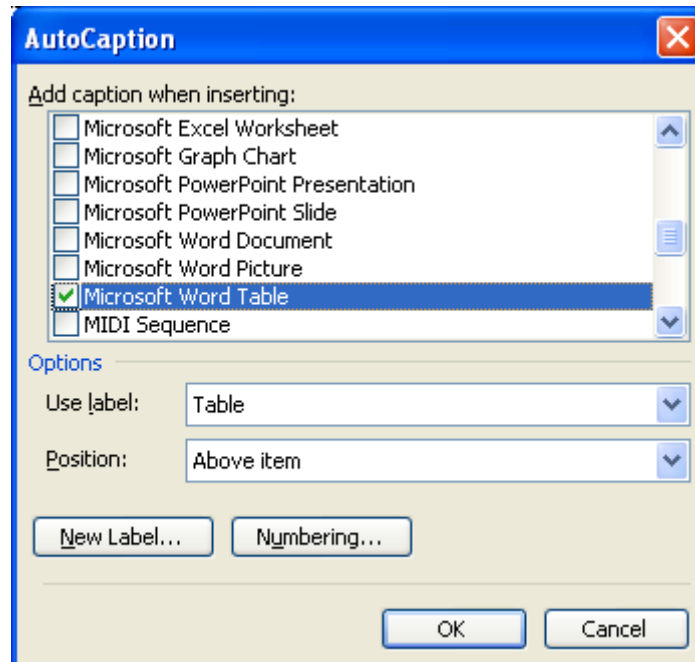
- Select the type of label. It can be Table, Figure or Equation.
- Select the position of the label, which can be either above or below the selected object.
- Enter the text for the caption in the **Caption** box.
- Click on **OK**.

Automatic Captions

If you turn the Autocaption feature on, Word will insert a new caption for each table, equation or figure that appears in your publication.

To Turn Autocaption On

- From the **Insert** menu, select **Reference**, then **Caption**, and then click on the **Autocaption** button.



- Select the object that a caption is to be added to.
- Select the appropriate label.
- Select the required position.
- Click on **OK**.

After you set up the Autocaption, Word automatically adds the caption to each new object. Any text that you want to include in the caption still has to be added by you because Word only adds the caption name and number such as Table 2. All you have to do is click beside the caption name and add your text to it.

To Turn Autocaption Off

- From the **Insert** menu, select **Reference**, then **Caption**. Click on the **Autocaption** button.
- Turn the check box off for the object in the **Add caption when inserting** box.
- Click on **OK**.

Footnotes and Endnotes

Word 2003 provides both footnotes and endnotes. Footnotes are positioned at the bottom of the page and endnotes are located at the end of a document or section.

Footnotes look similar to this example.

Character

He was of short stature, handsome and well proportioned and he possessed that commodity so rare in rulers - grace. However he suffered from bad teeth and was generally of feeble health. His body was covered in spots and he had many birthmarks scattered over his chest and belly.¹

¹ Tacitus, *The Caesars*, London, 1988

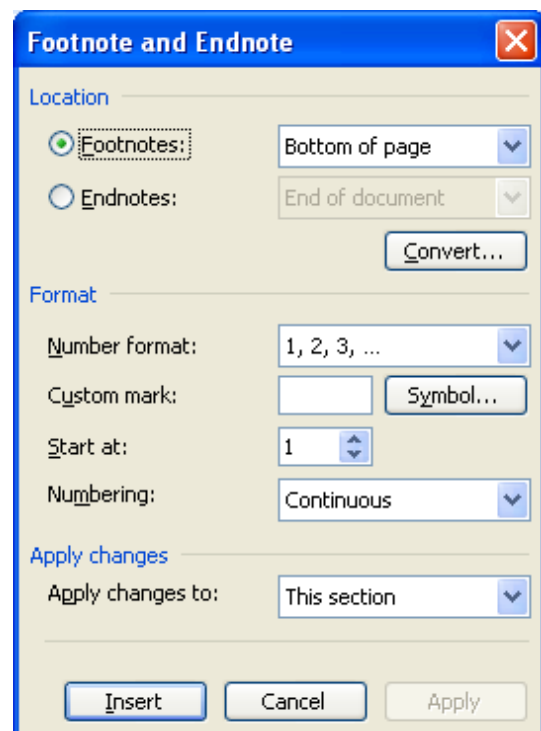
Word inserts a marker in the text of the document, which defaults to a number. Word automatically draws a line about one third of the way across the page to separate the footers from the rest of the document. Word does not restrict you to using numbers for footnotes. It is possible to use Roman numerals or any font symbol that is available.

Inserting a Footnote or Endnote

- Place the insertion point where the footnote or endnote marker is required.
- From the **Insert** menu, select **Reference**, then **Footnote**.
- Select the required options and then click on **Insert**.
- If you are in **Normal View** Word opens the Footnote pane. Enter the footnote data and click on **Close**.

Footnote and Endnote Options

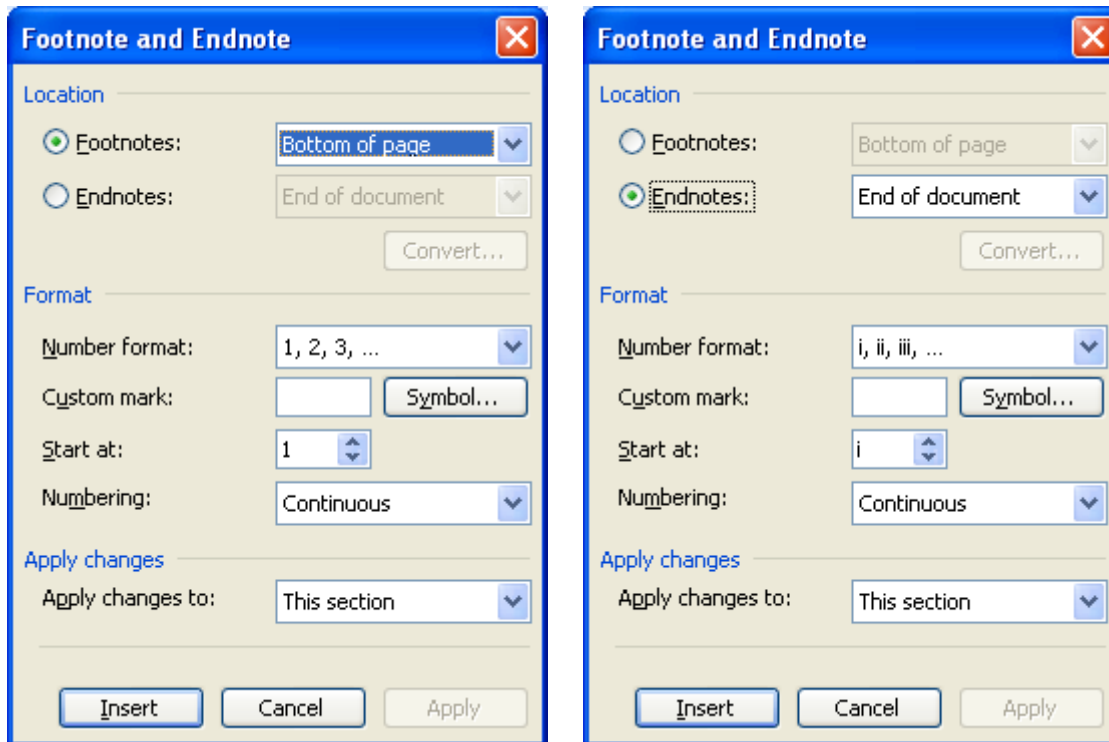
The default settings for footnotes and endnotes are set to number continuously from one, with footnotes using Arabic numerals and endnotes using lowercase Roman numerals. You may want to change this because the documents



form part of a larger document such as a thesis or book. You can also change the numbering style for footnotes and endnotes.

To Change Footnote and Endnote Options:

- From the **Insert** menu, select **Reference** and then select **Footnote**.



Footnote Options

Endnote Options

- Select the position of the footnotes or endnotes from the list of options.
- Change the formatting options if required.
- Click the Insert button when finished.

Editing Footnotes and Endnotes

To edit footnotes and endnotes:

- Place the cursor on the page where the footnote or endnote marker is located.
- From the **View** menu, select **Footnotes**.

or

- Double click on the marker in the text.

Whichever option you choose, Word will open the footnotes or endnotes pane and the cursor will be in the pane. Use the arrow keys to move through each footnote or endnote and the backspace and delete keys to edit them. Make any required changes to the footnotes or endnotes and click on the **Close** button to end the process. If you double click on the footnote marker, Word will take you directly to that footnote.

- Make the changes to the footnote and click on the close button.

A Note On Footnotes and Endnotes

When you insert footnotes or endnotes, Word will automatically adjust the numbers for all of the footnotes and endnotes after the new one is inserted. The same applies if a footnote or endnote is deleted.

Using Styles

Styles

When you apply a style, you apply a whole group of formats in one simple step. Using styles to format documents helps to ensure that documents are consistent. When styles are used to format a document you only have to change the style once to change all text that has been formatted with the particular style. Styles are very important for setting up tables of contents and other automated features such as indexes and lists of diagrams.

What are Styles

A style is a series of formats that can be applied all at once to one or more paragraphs or one or more characters.

- **Paragraph Styles:** paragraph styles control the formatting of whole paragraphs. They can include features such as fonts, character spacing, indents, tabs, alignment, borders, shading, bullets and numbering.
- **Character Styles:** character styles can only be built from text formatting options such as fonts, borders and shading. Character styles apply to text only.

Generally, paragraph styles are used much more than character styles. Character styles are usually for very specific purposes. For example you can use a character style to format a short block of text such as a Department name.

Word 2003 also has two other types of styles. These are **Table** and **List**. Table styles are used to format Word tables and the List style is for numbered and bulleted lists.

Conflicting Styles

When ever two styles are used together a possible conflict may occur, such as two different fonts, then the character style will override the paragraph style. Any manual formatting will override both paragraph and character styles.

Default Styles

Everything that you do in Word is controlled by styles. When you start a new document Word uses the Normal style. All the default and predefined styles can be changed.

Applying a Predefined Styles

To Apply an Existing Style:

- Select the text or paragraph you want to format.

To Use an Existing Paragraph as the Basis for a Style:

- Format the paragraph or text the way you want it then select it.
- Display the Styles and formatting options in the Task Pane. From the **Format** menu select **Styles and Formatting**.
- Click on the button labelled **New Style**.
- Enter a name for the new style in the **Name** box.
- Click OK to close the dialog box.

Modifying Styles

Any style can be modified, including predefined styles and styles that you create yourself. **A word of warning: Do not modify predefined styles. It is a far better option to create a totally new style, even if it is very similar to an existing style.** The reason for this is that once you have modified a predefined style the original will be replaced with the new version.

To Modify a Style:

- Display the Styles and formatting options in the Task Pane. From the **Format** menu select **Styles and Formatting**.
- Place the mouse pointer over the style to be modified.
- Click on the drop down arrow on the right of the style name.
- Select **Modify** from the list. The style can now be modified.
- Click **OK** when the modifications are complete.

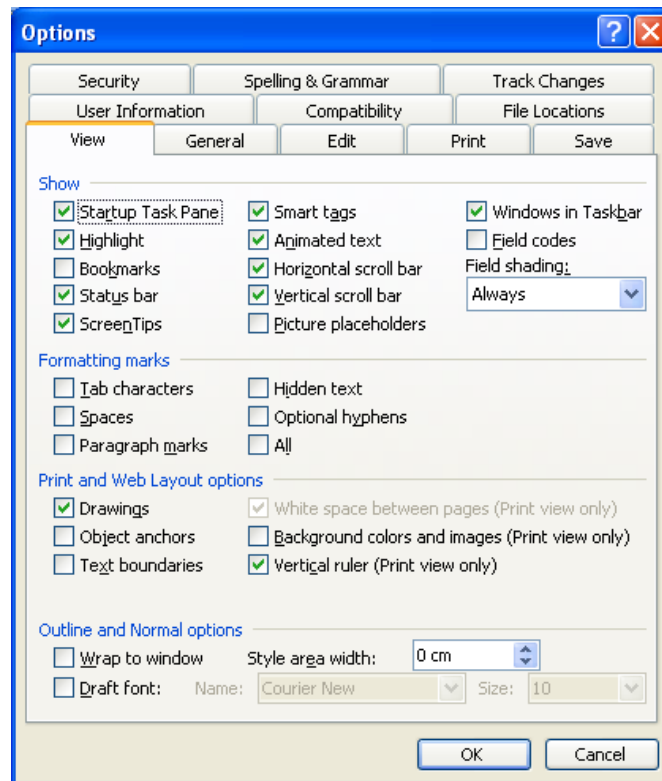
Note: All instances of the modified style will be automatically updated when you click on the OK button.

Displaying Styles in a Document

Style names can be displayed on the document that you are working on. This can be very useful if the document uses styles created by someone else, or that uses styles you created a long time ago.

Displaying style names on a document:

- Change the document view to **Normal**. This can only be done in **Normal View**.
- Select the **Tools** menu, then **Options**.
- Select the **View Tab**.



- Set the Style Area Width to about 3 cm. This measurement is the amount of space used at the left of the screen to display the style names.
- Click **Ok** to close the dialog box.

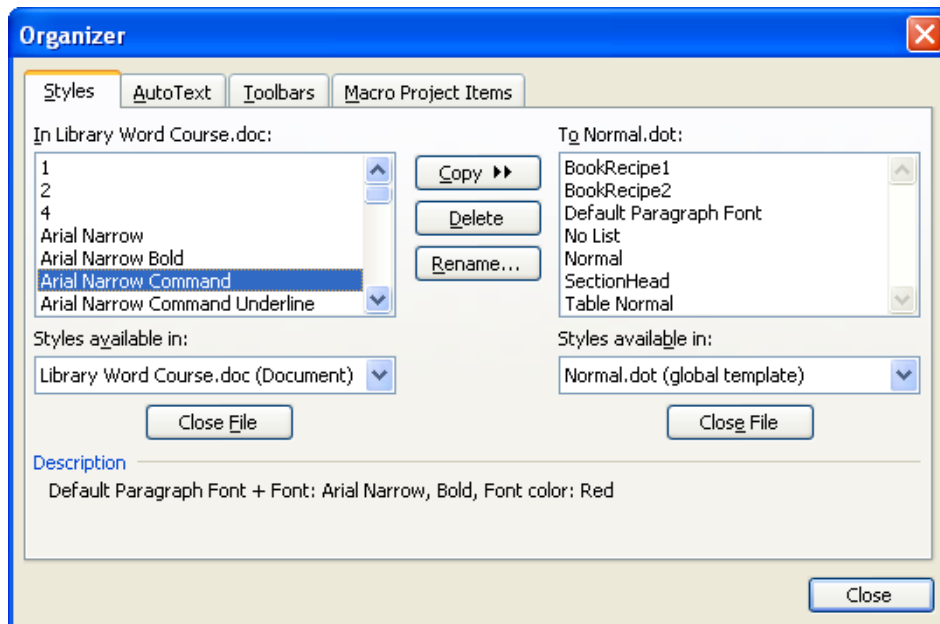
The style names appear in the left side of the document window. You can adjust the width of the Style area by dragging the vertical line between the document and the Style area.

Style names can be hidden by changing the **Style Area Width** back to zero cm.

Copying Styles between Documents and Templates

When you create styles they are often attached only to individual documents. Word allows you to attach the styles to the Normal template, which every new document is based on. This means that you do not have to recreate the styles for every document that you want to use them in.

- From the Tools Menu select Templates and Add-ins.
- Click on the Organiser button.
- Make sure that the **Styles** tab is selected.



The left side of the dialog box displays the name and styles of the current document. The right side of the dialog box displays the name and styles of the currently attached template: the Normal template. You must close the NORMAL.DOT template before you can open another template or file.

- If the file that contains the styles you want to attach to the Normal Template is not listed in the left hand box, click the **Close File** button and then click the **Open File** button to locate the required file.
- Select the style name by clicking on it once.
- Click the **Copy** button to copy the style from the file or template to the document in the box on the right side of the dialog box.
- Click the Close button when all of the styles are copied across to the required file or template.

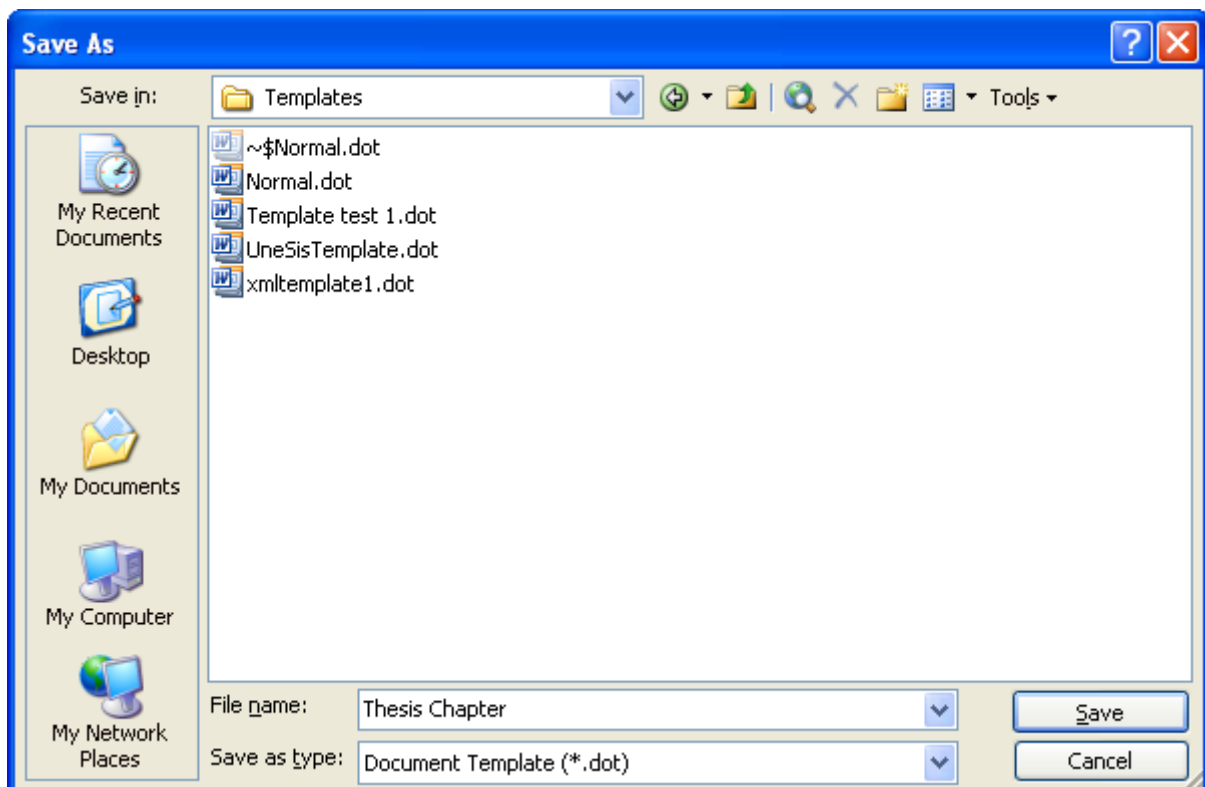
Templates

Word bases all documents on the Blank Document template, named Normal. Because the Normal template supplies every document, it is called a global template. It is a good idea to create your own templates for specific tasks. For example, if you work on a newsletter, it would save time to create a template with all of the elements that are repeated in each edition of the newsletter, such as formatting colours, fonts and styles, logos, graphics and standard text.

Creating a New Template

You can either open a new blank document and add all of the elements that you want in the template, or open an existing document, edit it and then save it as a template.

- Open a new document.
- Add all of the elements to the document that you want to include in the template.
- From the **File** menu, select **Save As**.



- Type a name for the new template and select **Document Template** for the file type.
- The Save in option will default to the **Templates** folder. Do not change this.
- Click on the **Save** button.

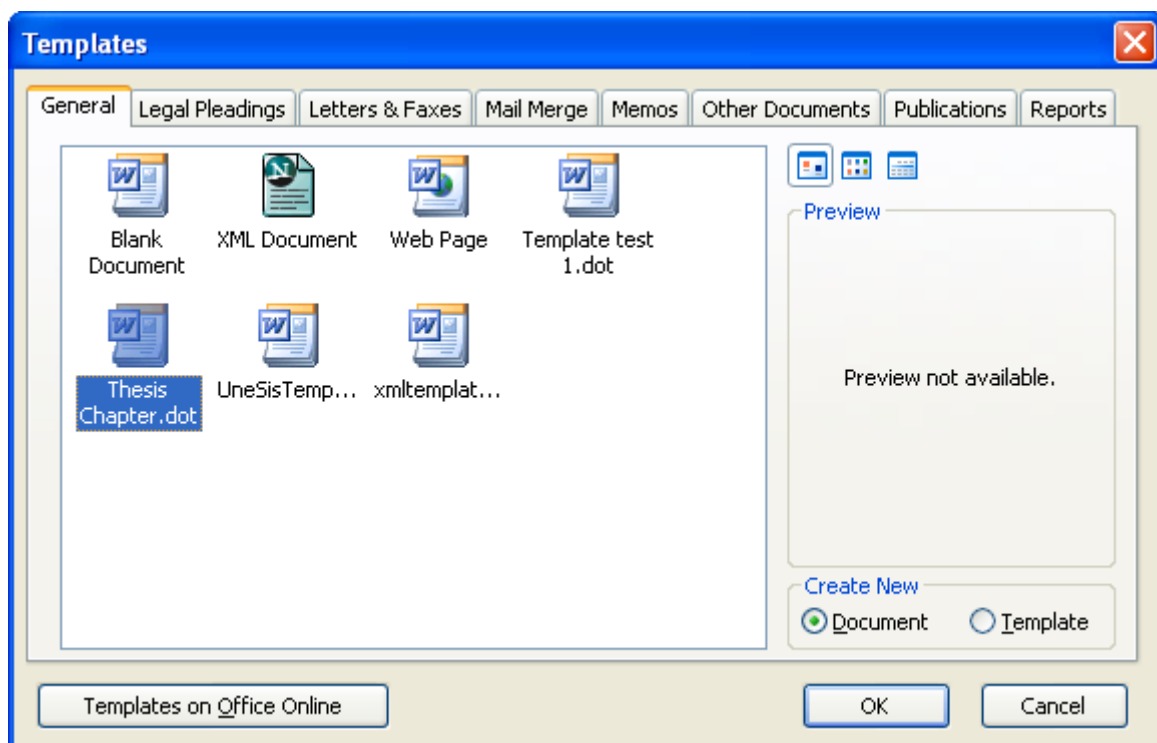
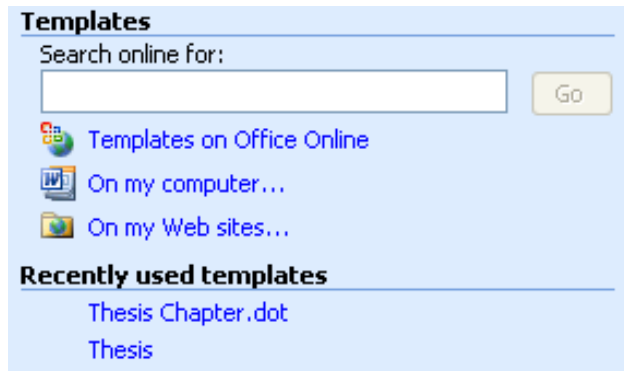
If you save a template in the **Templates folder**, the template will appear on the **General tab** when you click **New** on the **File** menu.

Using the Template

- From the **File** menu, select **New**.
- The Task Pane will be displayed on the Left of the screen.

The template that you require may be listed under the **Recently Used Templates** heading. If not, you can search for it or click on the link **On My Computer**. This will open the Templates dialog box.

- The template you created should be in the **General** tab.



- Make sure that **Create New Document** is checked.
- Select the template and open it like any normal new document.
- Create your document in the usual way and save it.

Creating a Table of Contents

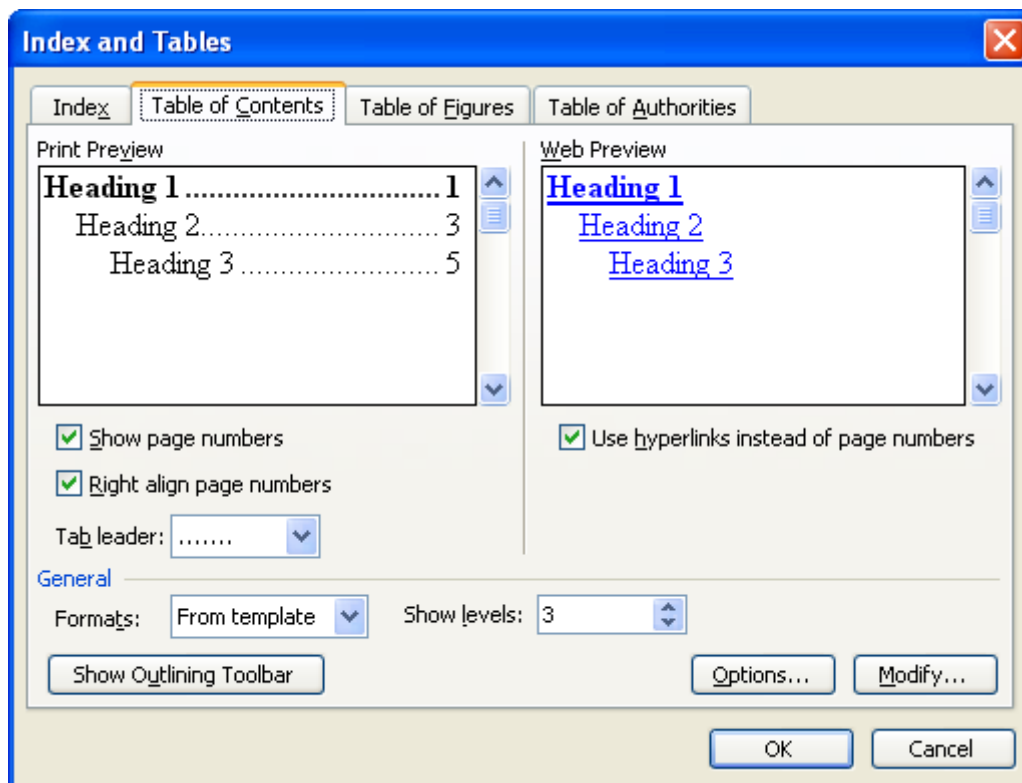
Setting up a table of contents for a long document is always a good idea and mandatory with documents such as a thesis. With a little work before you begin creating the document, Word makes it easy to generate and update as needed any table of contents.

Before you generate a table of contents, the headings that are to be included must be formatted with the correct styles. Use the set heading styles Heading 1, Heading 2 and Heading 3. You can create and use your own heading styles, however this will mean a few extra steps when generating the table of contents.

Generating a Table of Contents

To Set Up a Table of Contents:

- Apply the **Heading styles** to the text that is to be included in the table of contents.
- Position the insertion point where the table of contents is to be placed.
- From the **Insert** menu, select **Reference**, then **Index and Tables**.
- Select the **Table of Contents** tab.



- Click on **OK**.

If Word can not generate the table of contents then the following error message will be displayed. **Error! No table of contents entries found.**

Updating a Table of Contents

The table of contents is not updated automatically. Any changes that you make to your document may affect the table of contents. These could include page numbering as well as new headings and sections that may not be included in the table of contents. To overcome this problem you don't have to start from scratch because Word will allow you to update the table of contents.

To Update the Table of Contents:

- Position the insertion point anywhere in the table of contents.
- Press the **Update Field** key (**F9**). The following dialogue box will be displayed.



- Select the required option.
- Click on **OK**.

Table of Contents Options

Selecting a look for your table of contents

Word provides a number of different choices for changing the look of your table of contents. These are Classic, Distinctive, Fancy, Modern, Formal and Simple.

- Select the required look for your table of contents by clicking on its name in the list of **Formats** in the **Index and Tables** dialogue box.

Word will change the preview to show a sample of each style of table of contents.

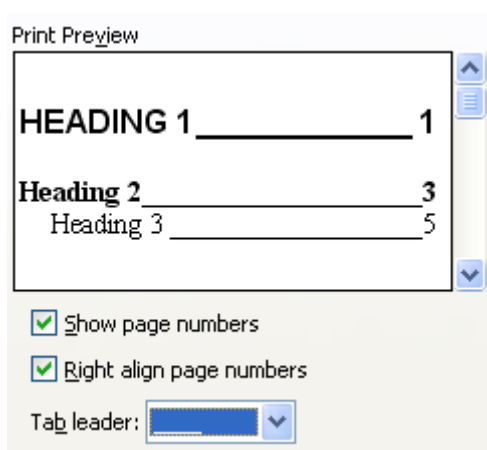
Page Numbers in Tables of Contents

Word gives you three choices for page numbers in a table of contents. These are:

(1) No page numbers: Turn the **Show Page Numbers** check box off. When you do this Word will also deactivate the **Right Align Page Numbers** check box and the **Tab Leader** box.

(2) Word will usually place the page numbers on the right margin in a table of contents. It is possible to place the page numbers after a space at the end of the entry in the table of contents. To do this, turn the **Right Align Page Numbers** check box off. Word will also deactivate the **Tab Leader** box.

(3) The last option is to change the leader style. Word will automatically select a leader style based on the format that you have selected. It can be changed by selecting a different option under the **Tab Leader** box.



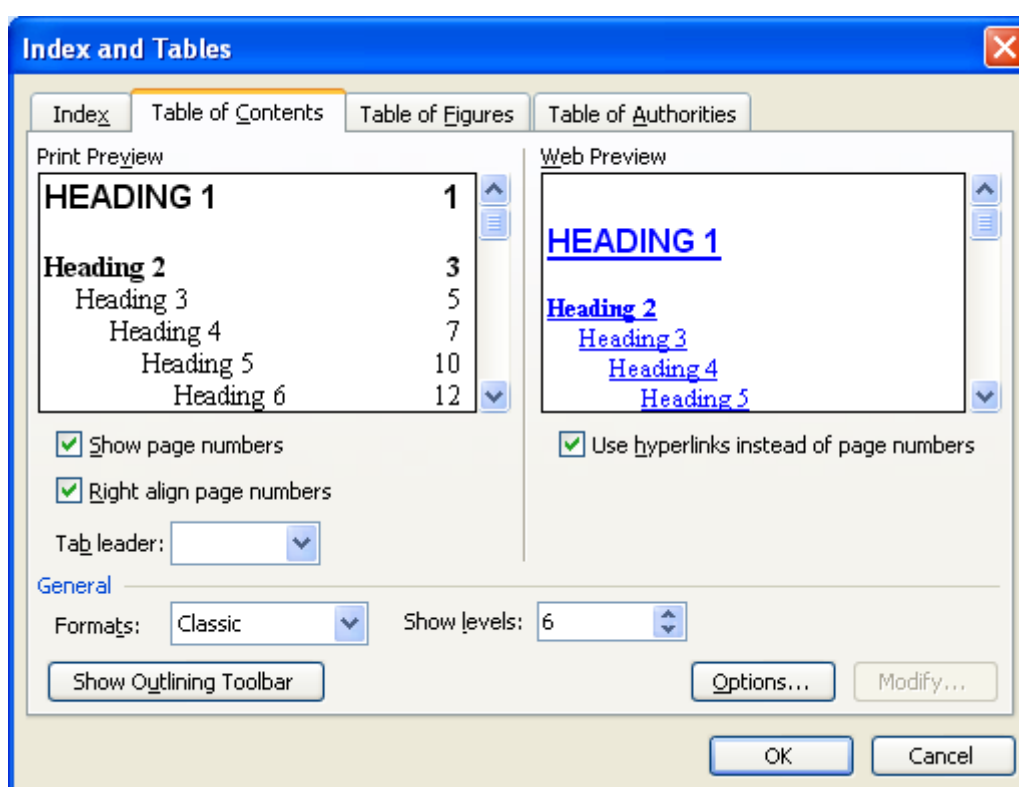
Adjusting Heading Levels

Word will allow you to adjust the number of heading levels that appear in a table of contents. It is possible to have any number of levels between 1 and 9. The number of levels should be determined by the number of headings and attached subheadings in your document.

To change the number of heading levels:

- Click the up or down arrows in the **Show Levels** box.

As you change the number of levels the preview sample will also change.

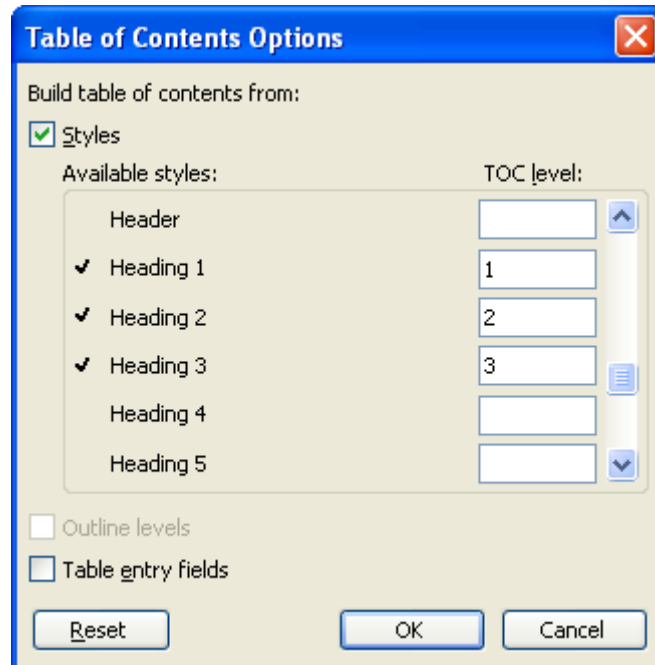


Using Your Own Styles for a Table of Contents

The easiest way to set up a table of contents is to use the preset heading styles to identify the headings that you want to include in the table of contents. However, there will be times that you prefer to use your own styles. This is not really a problem, except that you will have to identify which styles have been used and what level of heading they represent. Once again, you will have to apply the required styles, otherwise the process will not work when you generate the table of contents.

To Generate a Table of Contents Using Your Own Styles:

- Position the insertion point where you want the table of contents to be inserted.
- From the **Insert** menu, select Reference, then **Index and Tables**.
- Select the **Table of Contents** tab.
- Click on the **Options** button.



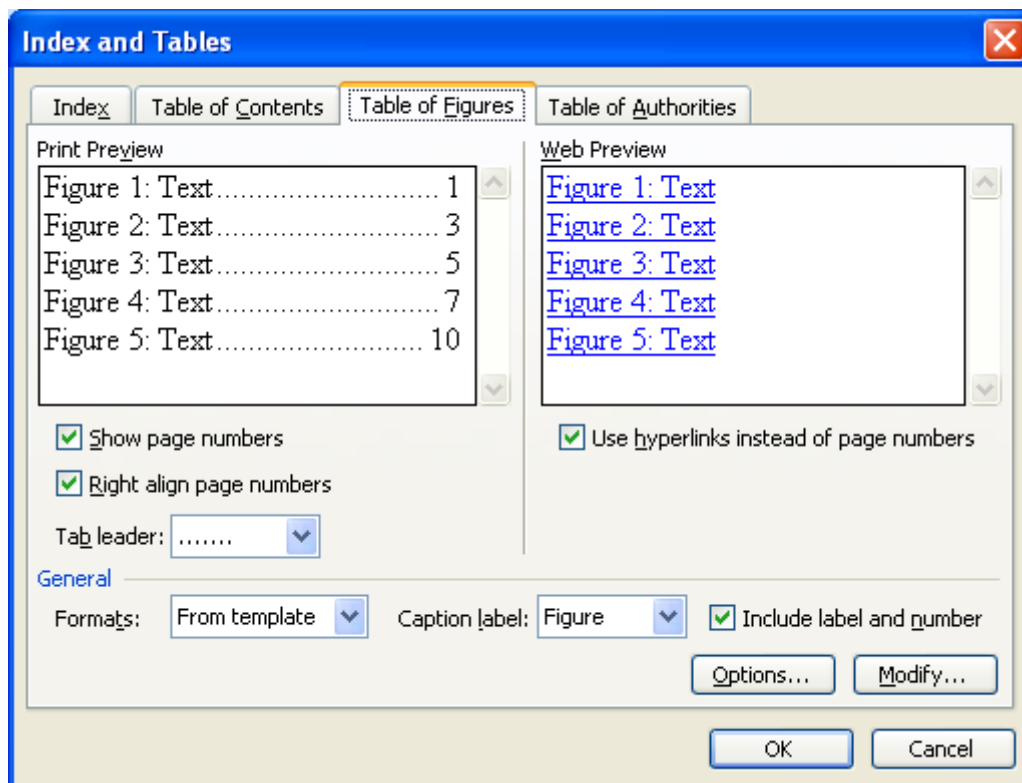
- Remove the default Table of Contents levels by clicking in the boxes and deleting the 1,2,3 etc.
- Find the styles in the list that you have used and enter the 1,2,3,4 etc in the TOC boxes beside their names. 1 indicates the top level style heading for the table of contents, and so on.
- Click on **OK**.
- Make any further changes to the format of the table of contents.
- Click on **OK**.

Creating Lists of Figures, Tables and Equations

Creating a list of tables, figures and equations is a bit like creating a table of contents. In professional publications these elements are listed, traditionally, after the table of contents. The difference between a table of contents and lists of figures, tables and equations is that Word uses captions to generate the lists.

Generating a List of Figures, Tables and Equations

- Make sure that all figures, tables or equations have captions.
- Position the insertion point where you want the list to appear.
- From the **Insert** menu, select **Reference** and then **Index and Tables**.
- Select the **Table of Figures** tab.



- Select the appropriate **Caption Label**. ie table, figure or equation.
- Select a format for the list.
- Click on **OK**.

Building an Index

When you create long documents such as a thesis or book, you should always create an index. A table of contents is really a general guide to the subject matter of the publication whereas an index gives a fuller guide, including the number of occurrences and page numbers, of specific items in your work.

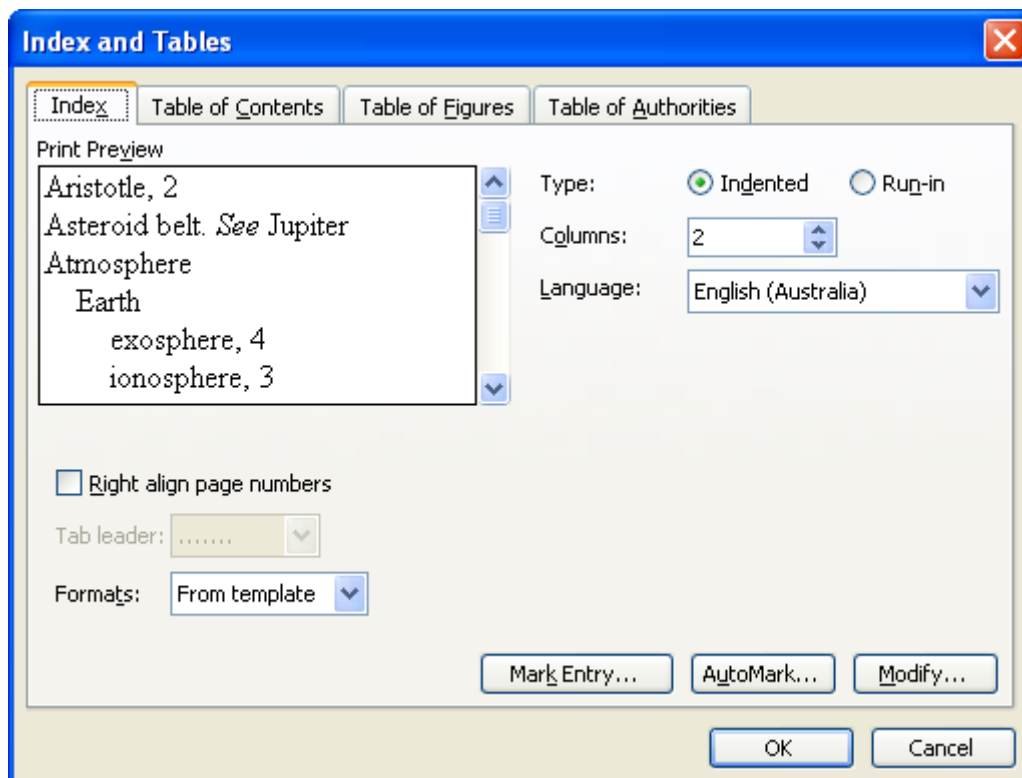
Building an index is like creating a table of contents. Firstly you have to mark the text that you want to include in the index. Word does this with a field command, which is called **XE**. These index fields are actually hidden text, however Word will display them if you want. The second part of the process is to generate the index. Word will do this in much the same way that it generates a table of contents.

Marking Text Entries

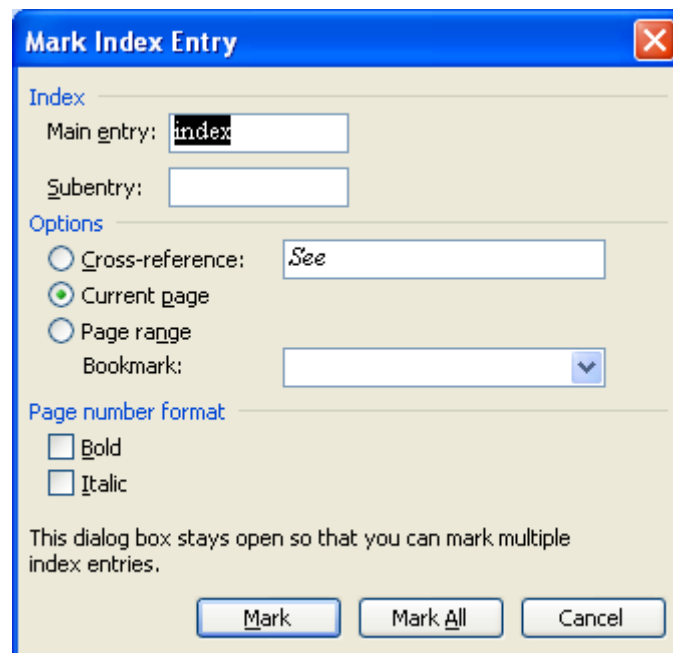
There are two ways of marking text for inclusion in an index: you can use text that already exists in the document or you can enter your own text which may or may not match the existing document text word for word.

Using Existing Text for Index Entries

- Select the text that you want as the index entry.
- From the **Insert** menu, select **Reference** and then **Index and Tables**.



- Click on the **Mark Entry** button.



The text that was selected is displayed in the **Main Entry** box.

- Click on the **Mark** button.
- If you click the **Mark All** button, Word will mark every occurrence of that text in the document for inclusion in the index.

The Mark Index Entry dialog box remains open.

- Click back in the document and select the piece of text to be included in the index.
- Click on the **Mark** or **Mark All** button.
- Repeat the process until all of the text that you want to include in the index has been marked.
- Click the **Close** button.

A Note on Index Entries

For each index entry, Word inserts an index entry field using hidden text similar to the following example: `{XE "Julius Caesar"}`.

The dotted underline shows that this field has the hidden text font and the text in the quotation marks is the text that will appear in the index when it is generated.

Using Other Text for Index Entries

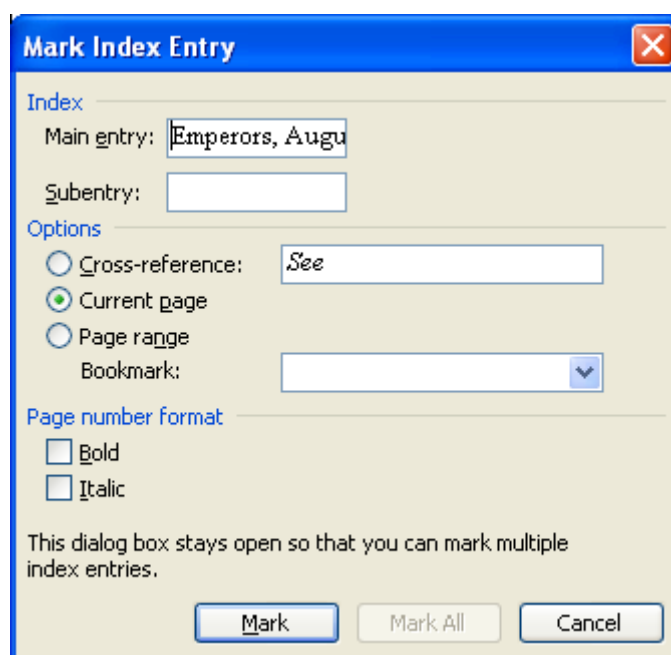
An index created from selected text is basically little more than an alphabetical list of terms and their page numbers. Taking the time to create a more professional looking index is well worth the effort. An index will often include text entries that do not appear in the document word for word. For example, instead of the index entry “Harley-Davidson motorcycles” you are more likely to see “Motorcycles, Harley-Davidson” and/or “Harley-Davidson, *see* motorcycles”. These sorts of entries for an index can be created quite easily with Word.

To Create Your Own Text Entries for an Index:

- Position the insertion point next to the text you want to include in the index.
- From the **Insert** menu, select **Reference** the **Index and Tables**, then, click on the **Index** tab.
- Click the **Mark Entry** button.
- In the **Main Entry** box, type the index entry as you want it to appear. For example, if you want the entry in the index to say “Emperor, Augustus” then that is exactly what you type.
- Click on the **Mark** button.

The field entry in the document will look like `{XE “Emperor, Augustus”}`

- Because the Mark Entry dialogue box remains open you can continue marking as many different entries as you like. Place the insertion point next to the text then enter the required index entry in the **Main Entry** box and then click on the **Mark** button.
- When finished click on the **Close** button.



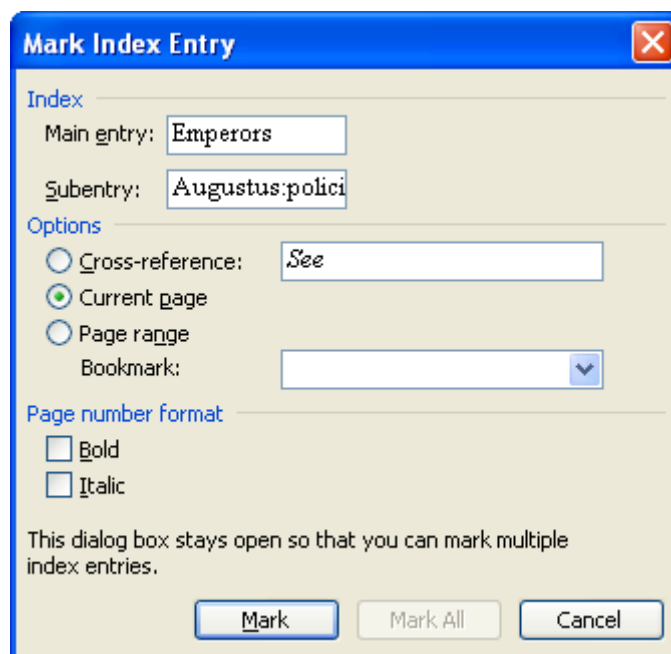
Index Options - Subentries

Most indexes contain subentries, which are the subheadings underneath major headings. The following example displays subheadings. In this example there are two levels of subentries.

Augustus
 Policies
 Domestic

To Create Subentries:

- Position the insertion point next to the text for the index entry.
- From the **Insert** menu, select **Reference**, then **Index and Tables**, then, click on **Mark Entry**.



- Enter the main index entry in the **Main Entry** box.
- In the **Subentry** box enter the lower levels of index entries.

Create multiple levels of subentries by separating the text with a **colon**. For example, the subentry *Augustus:Policies:Domestic* will create three levels of subentries below the main index heading of Emperors.

- Click on the **Mark** button.
- Repeat the process for as many subentry index entries that you require.
- Click on **Close** when finished.

Index Options - Creating a Cross Reference

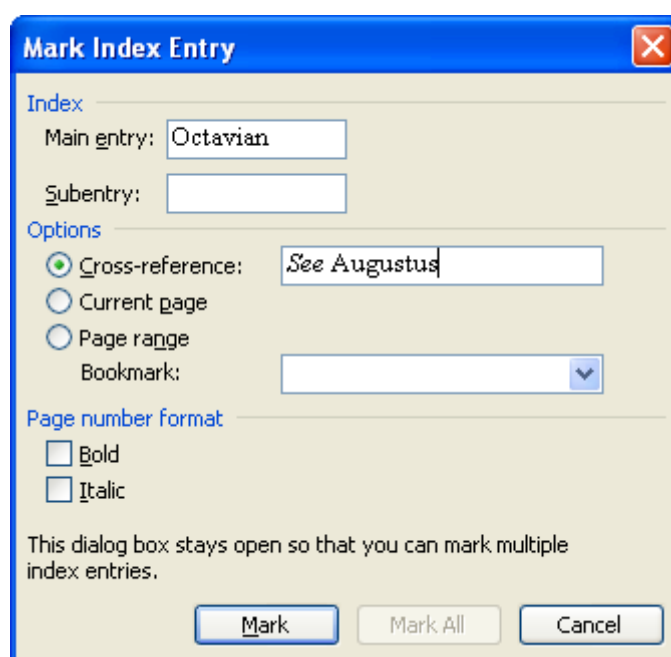
A cross reference in an index is when an entry refers you to another entry somewhere else in the index. This is more commonly referred to as a *see* entry. Cross references are used for terms that are related that may not actually appear in the publication or are very closely related to other terms.

To setup a Cross Reference:

- Position the cursor next to the text to which you want a *see* reference.
- From the **Insert** menu, select **Reference**, then **Index and Tables**, then, click on the **Mark Entry** button.
- Enter the main entry level text.
- Activate the cross reference box by clicking in the radio button.
- Type the actual cross reference text after the word *see*.
- Click on **Mark**.
- Click on **Close**.

For example, to create a cross reference from the name Octavian to Augustus the name Octavian is entered in the Main entry box and the name Augustus is entered in the Cross reference box.

The field code will look like the following: {XE “Octavian \t “*See Augustus*”}. The \t instructs word to replace any page numbers with the text in quotation marks. In this example it would be *See Augustus*.



Mark Index Entry

Index

Main entry: Octavian

Subentry:

Options

Cross-reference: See Augustus

Current page

Page range

Bookmark:

Page number format

Bold

Italic

This dialog box stays open so that you can mark multiple index entries.

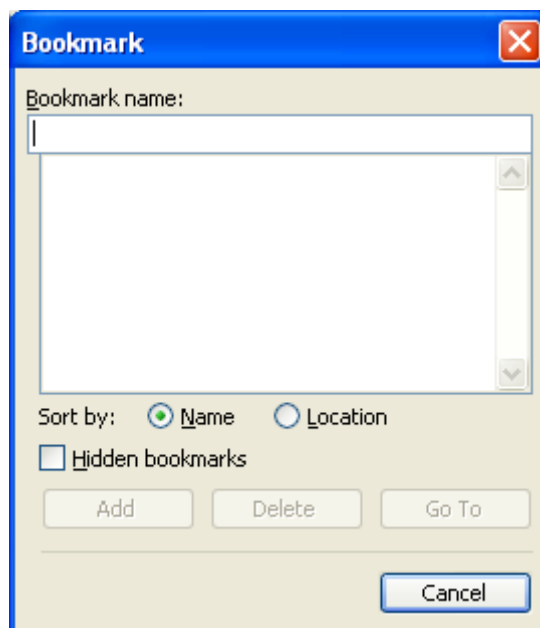
Mark Mark All Cancel

Index Options - Page Ranges

Some index entries will need to specify a range of pages, such as Augustus, 25-45. Setting up the index marker to do this requires an extra step called a **bookmark**. A bookmark is a name that you assign to a particular place, which usually refers to more than one page in the document.

Step 1 - Setting Up the Bookmark:

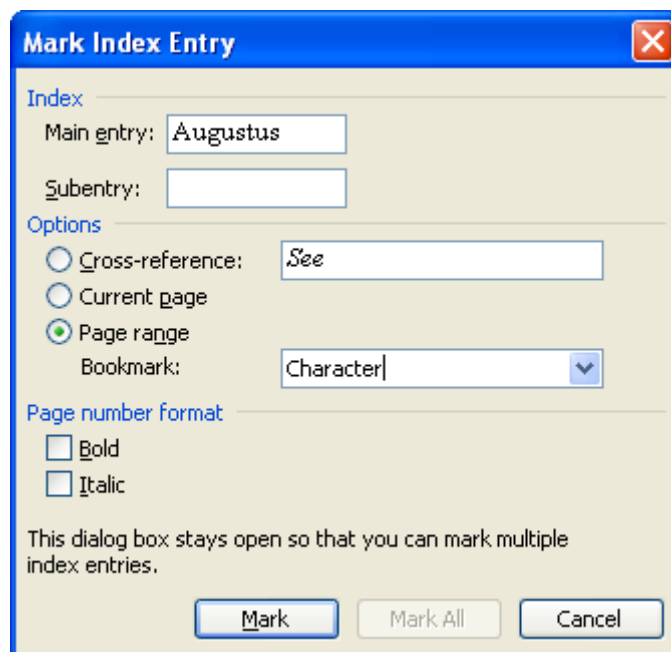
- Select all of the text that you want to include in the bookmark.
- From the **Insert** menu, select **Bookmark**.



- Enter a name for the Bookmark and click on **Add**.

Step 2 - Setting Up the Index Entry:

- Position the cursor in the document where the index entry is required.
- From the **Insert** menu, select **Reference**, then select **Index and Tables**, then, click on the **Mark Entry** button.



- Enter the main text in the **Main Entry** box.
- Activate the **Page Range** option by clicking on the radio button.
- From the **Bookmark** box select the bookmark name.
- Click on the **Mark** button.
- Click on **Close**.

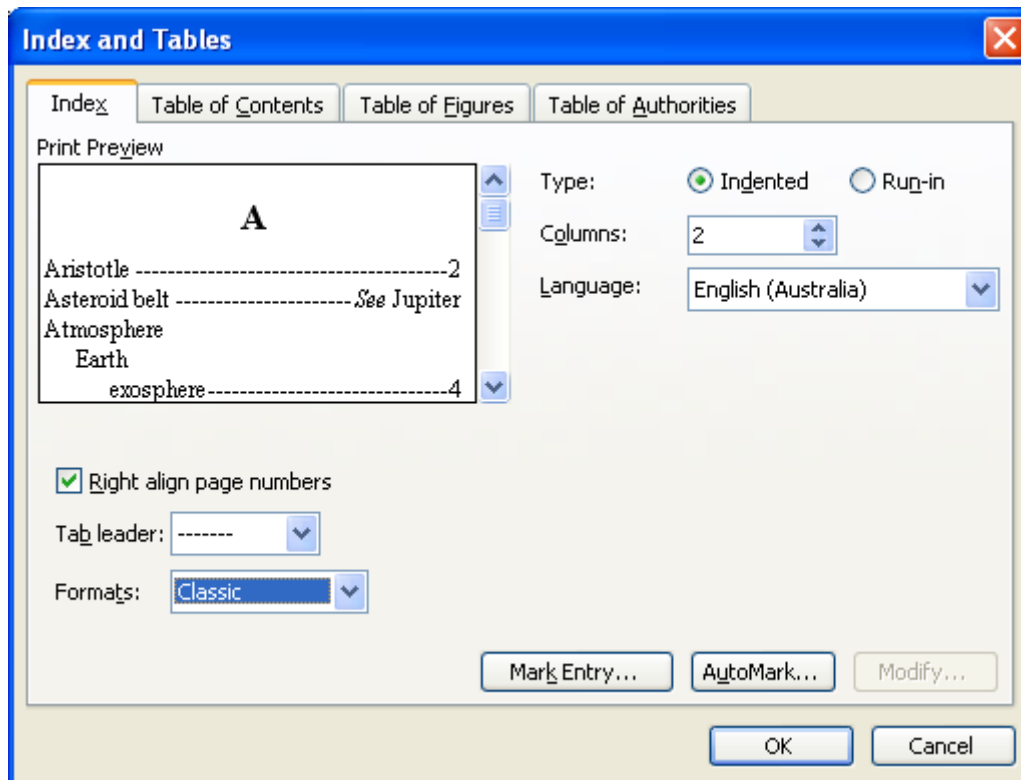
For example, an index entry such as Augustus, 15-30, would have a field entry code of:
`{XE "Augustus" \r "Character"}`

The \r "Character" instructs Word to insert the range of pages that the bookmark name covers, which in this example is pages 15 to 30.

Generating the Index

Once you have marked all of the text that you want to include in your index, including subentry levels and bookmarks for page ranges it is time to generate the actual index.

- Position the insertion point where you want the index to be displayed.
- From the **Insert** menu, select **Reference**, then **Index and Tables**.
- Select the **Index** tab.



- Select the format for your index.
- Select the number of columns for the index display.
- Click on **OK**.

References

See Endnote course (part of library research skills training)