

UNITEC Institute of Technology

Long Documentation

Writing a Thesis – Mac 2011

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Styles

A style is a pre-formatted standard that can be applied to headings and text. All text formatted with a particular style will have the same appearance. Word comes with a variety of styles, which can be modified. Or users can create their own styles.

Why use styles?

Using styles will make your documentation easier. Here are a few reasons:

- Styles ensure document headings and text are consistent.
- You do not have to remember what formatting has been applied to each heading – the formats are automatically applied when you use the style.
- If headings need to be reformatted, only one needs to be changed and the entire document will be updated.
- Features such as text flow are built into styles to prevent incorrect page breaks.
- It is easy to develop a Table of Contents.

Applying Styles to text using the Home tabs



To apply a built-in heading style

- Select the text to which you want to apply a style.
- Select the Style you want to apply in the **Styles** group on the **Home** tab. If you don't see the style that you want, click the arrow below (to view all) or arrow beside the visible options (to scroll right/left).
- You can see how selected text will look with a particular style by placing your pointer over the style that you want to preview.
- You can easily modify one style, by right clicking on the style.

Applying Styles to text using the Styles task pane

- Select the text to which you want to apply the style.
- Click on the Manage the styles that are used in the document *button*.



A Styles window displays on the right of the screen, each one shows a formatting preview or you can tick Show Styles Guides, to view where styles are in the overall document.

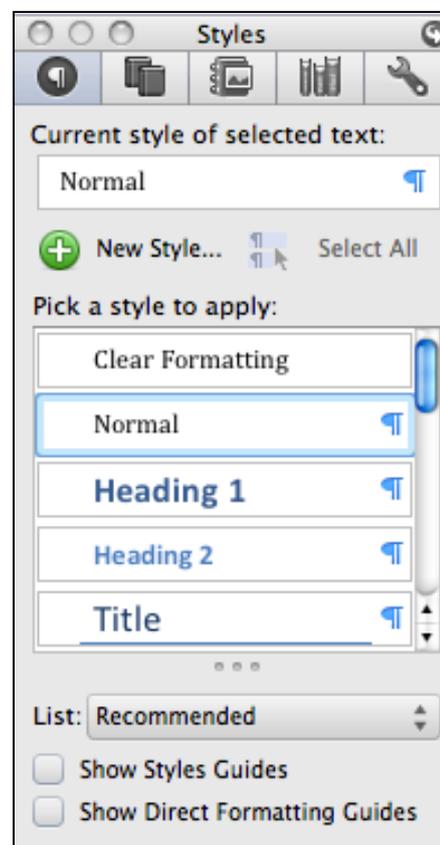
- Click on the style you want to apply from the list.
- If the style you want is not shown, use the **List field**. Change from **Styles in Use** or **Recommended** (see image) to **All Styles**.

Setting a Style for the following paragraph

This is useful for setting your styles so that when you press **ENTER** after using a certain style, the next style used is automatically selected.

Using the Styles window (see above):

- Hover over the style you want to modify from the Styles box, click the *down arrow* on the right. Choose **Modify Style**.
- Choose **Style for the Following Paragraph field** and select the style required.



Using Quick Styles

You can apply a specific style quickly by using the *Quick Style Gallery* found on the **Home tab** in the **Styles group**. Each set of Quick Styles will include styles for several heading levels, body text, a quote and a title. They are designed to work together to create an attractive and readable document.

To add a new style to the *Quick Styles Gallery*:

- Select the text that you want to create as a new style.
- Click the **Change Quick Styles Settings** button , choose **Styles**, then click **Save as a Quick Style Set**.
- Give the style a name and then click **Save**.

Remove a style from the Quick Styles Gallery

- In **Finder** on the main Word menu, open **Users/your username/library/Application Support/Microsoft/Office/Style Sets** folder.
- Drag the *Quick Style Set* you want to delete to the trash can.



Table of Contents

You can build a **Table of Contents** from your heading styles.

Creating a Contents Page

The Table of Contents lists each of the headings and its page number. Each heading is created through a “Style”, the styles are used to create the Table of Contents.

To create a contents page, do the following:

- Press **command + home** (Macbook: fn + command + left arrow key) to move to the top of your document.
- On the **Document Elements** *tab*, in the **Insert Pages** *group* select **Blank** to start a new page.
- Click where you want to insert the table of contents. Usually at the top of the document (command + home again or Macbook: fn + command + left arrow).
- On the **Document Elements** *tab*, in the **Table of Contents** *group*, click the **Table of Contents** you like from the *gallery*. Click the arrow below (to view all) and see which styles are auto and manual. Use an automatic one, for easy updating. **Note:** Styles with ‘type here’ are manual.

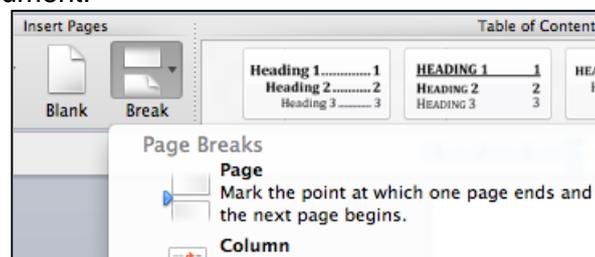
Update the Table of Contents

- On the **Document Elements** *tab*, in the **Table of Contents** *group*, click the **Update** *button*.
- Click Update page numbers only or Update entire table. Then OK.

Insert a Page Break

You can insert a page break anywhere in your document.

- Click where you want to start a new page.
- On the **Document Elements** *tab*, in the **Insert Pages** *group*, click **Break**, then select **Page** or press **command + enter** (Macbook: shift + fn + return key).



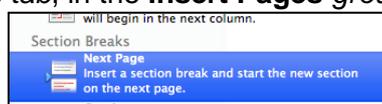
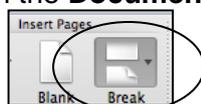
Insert a Section Break

You can use section breaks to change the layout or formatting of a page or pages in your document. Examples for using sections include:

- Separating the chapters in your document so that the page numbering for each chapter starts at 1.
- A different page orientation – e.g. landscape.
- Different alignment – e.g. to vertically centre one page only.
- You can also create different headers and footers for each section.

To create a section break

- Click where you want to make a formatting change (section break).
- On the **Document Elements** *tab*, in the **Insert Pages** *group*, click **Break**.



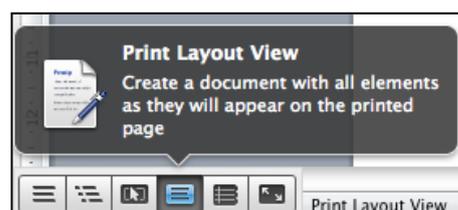
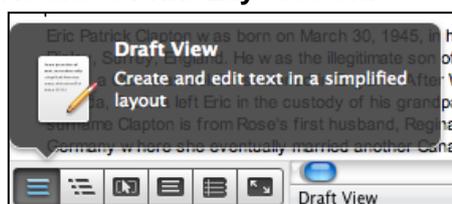
- In the **Section Breaks** *group*, click the section break that suits your formatting.

Remove a section break

To remove a section break, make sure you are in Draft view so you can see the double dotted line section break:

On the bottom left of the document, click the **Draft View** icon.

- Select the section break (with cursor on the section break line, hold down the **shift** key + press the right arrow key). This partially highlights the line.
- Press **delete** button on the keyboard.
- Return to **Print Layout** view.



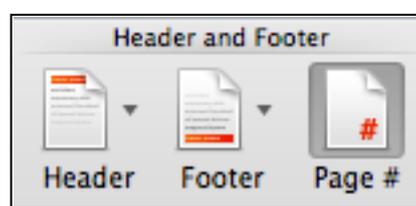
Adding Page Numbers

Office Word 2011 enables you to add page numbers in two principal ways. You can add basic page numbers by using the *Page Number* icon on the **Document Elements** tab, or you can add page numbers along with additional content by using the built-in or custom *Header and Footer* galleries.

When you insert a page number using the *page number* icon, Word 2011 automatically inserts the selected page number and opens the header and footer layer in your document for additional editing. If you want to add more complex page numbering as well as additional information, you can add headers and footers as described below under **Insert headers and footers**.

Inserting Page Numbers

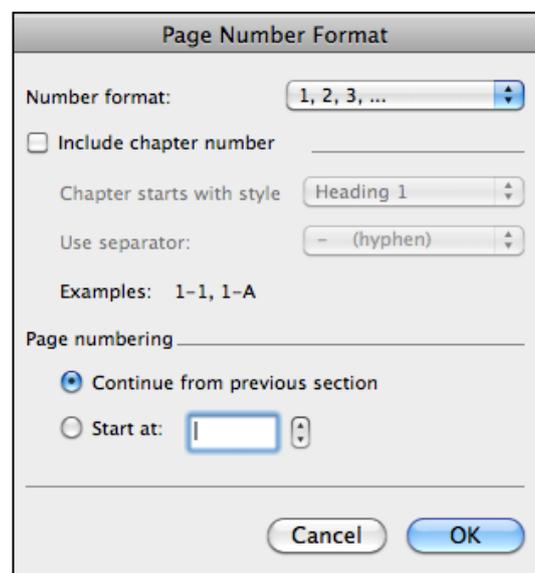
- On the **Document Elements** tab under the **Header and Footer** group choose **Page #**.
- Choose the **Position** and **Alignment** of the Page numbers.



Page Number Formats

- Insert the page number as above.
- Format Page Numbers can be used from the **Page Number** icon by clicking the **Format** button. The **Page Number Format** box (below) opens.
- Format the number as required.

Note: 'Start at' can be used to change format between sections, add a section break as described previously. eg: First section = Contents pages can be roman numerals (I, II), next section would start at 1 (1, 2, 3 etc)



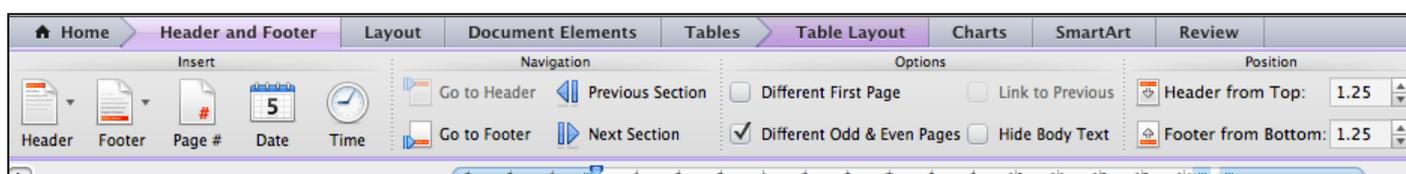
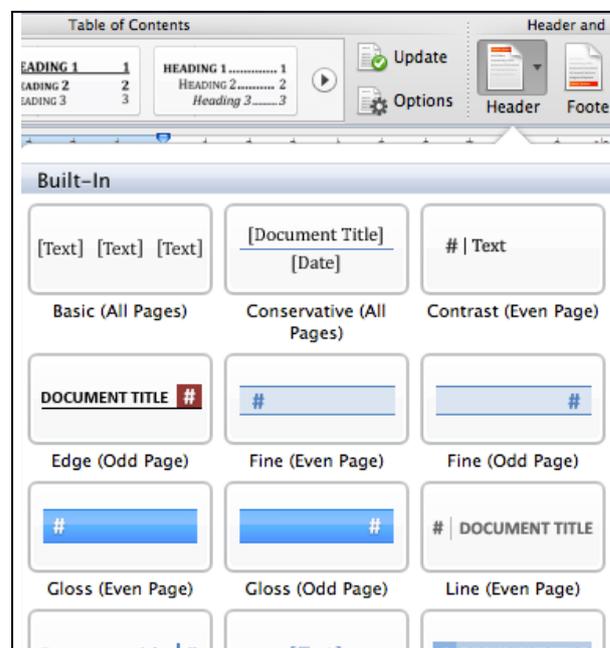
Insert headers and footers

Headers and footers are areas in the top, bottom and side margins of each pages in a document.

You can insert or change text or graphics in headers and footers. For example, you can add page numbers, the time and date, a company logo, the document title or file name, or the author's name.

- On the **Document Elements** tab in the **Header and Footer** group choose either **Header** or **Footer**.
- Choose a Built-In header or footer.
- Type your text in the space provided.
- To stop editing click on the close or  below the **Header** or above the **Footer** in your document.
- Double click into the **Header** or **Footer** in your document anytime you want to edit.

Note: When you insert a header or footer, the header and footer areas become accessible, the content area of the document becomes temporarily unavailable and the **Header & Footer Tools** displays along with the **Header and Footer contextual tab** (as shown below).



Creating a different Header and Footer for the first page

Decide if you want a Cover Page from the Word 2011 templates or want to create your own. If creating your own follow instructions here. Alternatively see section **Insert a Cover Page** as you *may not* need to use these instructions here.

Once a header or footer has been inserted the **Header and Footer contextual tab** becomes available. To activate this you must be clicked into the Header or Footer area – to do this double click in this area.

- On the first page of the document, double click in the header or footer area.
- Tick **Different First Page** in the **Options** group.
- A new header and footer section will be created on the first page to be customized.

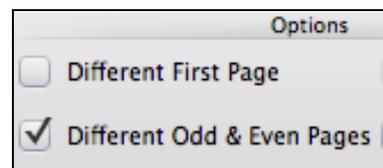
Note: If you choose not to use a header or footer on the first page, follow the instructions above, leaving it blank.

Reminder: Press fn + shift + return to start a new page.

Creating different odd and even page Header and Footers

This is often used in documents which are bound together into a spine. This is available on the **Header and Footer** *tab*, once an existing header and footer has been inserted.

Tick **Different Odd & Even Pages** tick box in the **Options** *group*.



Templates are set up for Odd and Even Pages, go to **Document Elements** *tab* Header or **Document Elements** *tab* Footer to view option.

Cover Pages

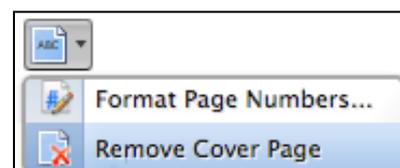
Built-in templates allow you to easily create cover pages.

- On the **Document Elements** *tab*, in the **Insert Pages** *group* choose **Cover**.
- Choose a style for the cover page.
- Type your text in the areas provided.

Note: You can only have one cover page, adding a new one will override a previous selection.

Removing a Cover Page

- Hover over the cover page in your document.
- Click the **ABC** *icon* that appears.
- Choose Remove Cover Page.



Create a Multilevel list

A multilevel list shows the list items at different levels rather than at one level.

```
1. Lorem
  1.1. Ipsum
    1.1.1. Dolor
```

You can pick a multilevel list style from the gallery, or you can create a new multilevel list style.

First you need to link your Multilevel List to your Styles:

- For each Heading Style you want to use, type a list somewhere in your document. I suggest at the end of your document. Type this:

Heading 1

Heading 2

Heading 3

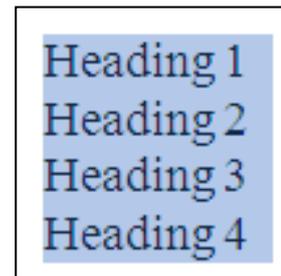
Heading 4

- Starting at **Heading 1**, highlight and click Heading 1 style on the **Home** *tab*, **Styles** *group*. Then highlight **Heading 2** on the list and click Heading 2 style on the **Home** *tab*, **Styles** *group*. Repeat with your remaining heading styles. Delete or add Headings, if you require more or less in your document.

- Highlight all of the headings typed above. See image. →
- Click on the **Home** tab, in the **Paragraph** group, click on the Multilevel List button. Shown below.



← Multilevel List button.



- Choose a multilevel list style in the gallery of styles. I recommend the 6th option. As shown here. →

You will see all the Heading styles on the **Home** tab, in the **Styles** group, your headings now have the Multilevel List you selected.

- Next delete the list we added to the bottom of your document.

Now every time you use a heading style the Multilevel List option will be automatically added.
Note: It also updates previously added Headings automatically.



Using Outline View

Outline View allows you to see the overall structure of the document. The features in Outline View make it easier to set up headings and sub-headings and to move quickly around a very long document created using styles.

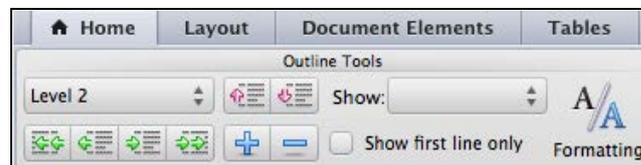
To access Outline View:

Select **Outline View** from the icons at the bottom left of your screen. The **Outlining** tab will show on your screen.



Outline ↗

Note: The **Home** tab updates by adding the **Outline Tools** group.



The following list describes what formatting appears in outline view, and what formatting changes you can make.

- Each heading level is formatted with the appropriate built-in heading style. Microsoft Word has nine different built-in styles: Heading 1 through Heading 9.) In Outline View, you can automatically apply heading styles by using the toolbar to change the headings to the appropriate levels.

Levels = Heading styles, 1 is the top level, body text is the lowest level.

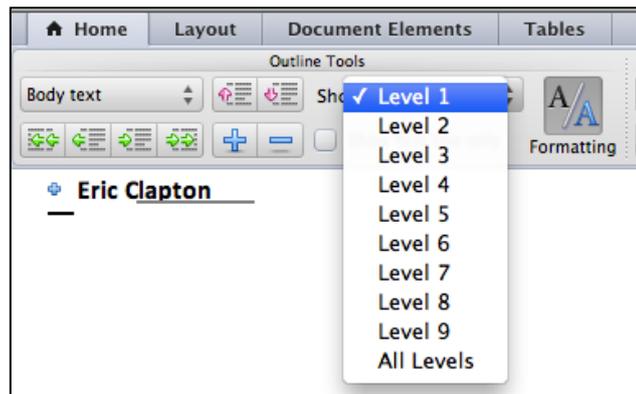
Note: If you want to change the appearance of a heading style, you can modify its formatting in **Home** tab. Refer to Styles section at the start of this manual.

- Word indents each heading according to its level. The indentations appear only in Outline View; Word removes the indentations when you switch to another view.
- Paragraph formatting doesn't appear. Also, the ruler and the paragraph formatting commands are not available. (You can apply styles, although you might not be able to see all the style formatting.) To view or modify paragraph formatting, switch to another view.
- If you find character formatting (such as large fonts or italic) distracting, you can display the outline as plain text. On the **Home** tab in the **Outline Tools** group. Click the **Formatting** button.

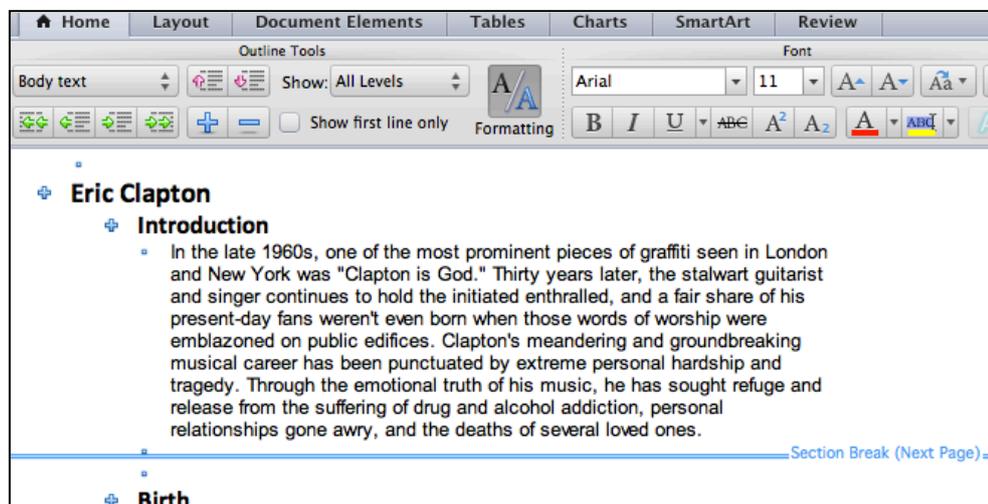


Additional viewing options:

- To show level 1 headings only, select it from the list on the **Home** tab.
- View more than one level – Use the Show Level drop down function, on the **Home** tab, it will show previous levels and the selected level. Level 1 and 2 headings can be displayed by selecting Show Level 2 from the list on the toolbar.



- A + sign beside heading indicates there is more to be viewed under the heading. If the heading is underlined, then the content is collapsed.
- A ■ sign beside text, indicates the text is body text or a clear line.



Expanding and Collapsing

There are two ways for expanding and collapsing text and headings:

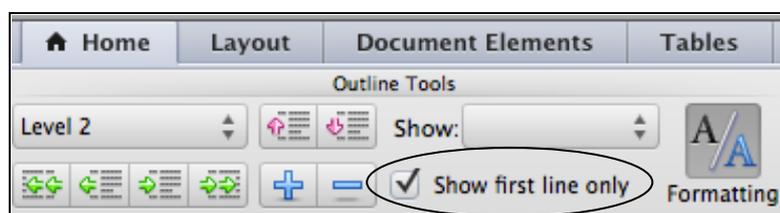
- Click on a heading and use the **Expand and Collapse buttons** in the **Outline Tools group** to expand or collapse the next level of heading or text.



- Double click on the + sign next to the heading you wish to expand and it will reveal everything under that heading, whether it is text or more sub-headings. To collapse the text again, double click on the plus sign again.

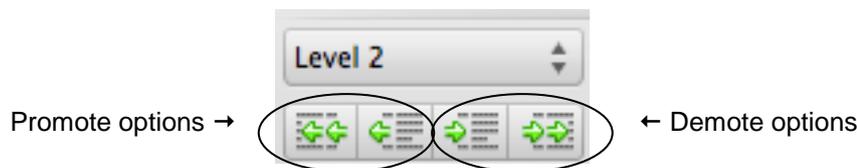
Viewing Text

To view text, tick the “Show first line only” button to switch between viewing the full paragraph and the first line of paragraph only.



Demoting and Promoting Headings

If you want to change a heading to another level do this with the Outline Tools.



- Click on any heading ie; level 3 (heading 3) and promote it to a level 2 heading, using the single arrow Promote button. To promote to level 1 (highest level) use the double headed arrow. Demote by a level or more using the single arrow Demote button. Demote to body text (lowest level) using the double headed arrow.

Moving Headings

Outline View is useful for moving blocks of text. When the text is collapsed to show only text of that level, all the text contained under that heading will move also.

Use the **Move Up** and **Move Down** buttons to change the headings position.



Remember: When text is expanded this allows you to move headings independently of the text under them. If you need to move the heading and all the text under that heading you should not have the text under that heading expanded.

Deleting Text

When text is collapsed to level 1 headings, a heading can be highlighted and deleted by pressing the **Delete** key. However, this will also delete all the sub-headings and text under that heading as well.

This is a good way of deleting large blocks of text that may span several pages.

Footnotes and Endnotes

Footnotes and endnotes give additional information about specific text in your document. Footnotes appear at the bottom of the page and endnotes are at the end of a section or document. You might use footnotes for detailed comments and endnotes for citation of sources. Footnotes and endnotes consist of two parts - the note reference mark and the note text.

Note: By default, Word places footnotes at the end of the page and endnotes at the end of the document.

To add a Footnote or Endnote:

- In **Print Layout** view click where you want to insert the note reference mark.
- On the **Document Elements** tab, in the **Citations** group, click **Footnote** or **Endnote**.
- Type the text you want to appear in the end reference. Use **Home** tab to format text as usual.
- Hover over the end of the footnote/endnote in the paragraph text and it will show you the corresponding end reference. Double click in front of the reference number to move between the two parts of each reference or from reference right click and choose Go to Footnote/Endnote.

To edit a footnote or Endnote:

- To make changes to the format of footnotes or endnotes, on the main word menu select **Insert**, then **Footnote**. The **Footnote and Endnote Dialog Box** opens, in the Number format box, click the format that you want.
- To use a custom mark instead of a traditional number format, use the dialog box, click **Symbol** next to **Custom Mark** and find then select, press **OK**. This *will* add a new one, but *not* amend an existing one. Examples of symbols you may want to use include: ® (Registered Sign), © (Copyright Sign).
- To change a Footnote into an Endnote or the alternative, right click on the end reference and select **Convert to** To convert all Footnotes to Endnotes or the alternative, use the dialog box and click **Convert**.
- To delete a Footnote or Endnote, just highlight the reference number within the page and hit delete on your keyboard, it is instantly deleted in both places.

Change Line Spacing

To change line spacing:

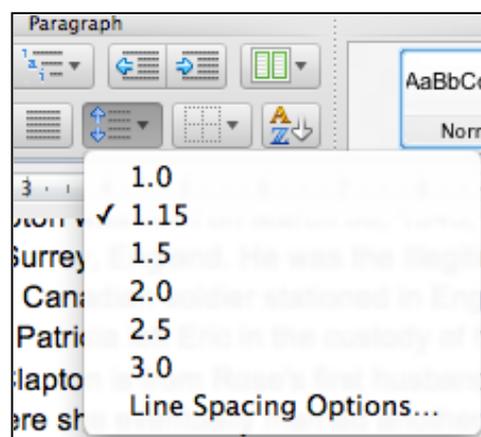
- Select the text you want to change
- On the **Home** tab in the **Paragraph** group, click the **Line Spacing** button.

Then do one of the following:

- To apply a new setting, click the arrow, then select the number that you want
- To set more precise measurements, choose **Line Spacing Options**.

Quick options for standard Line Spacing are:

- Single Spacing = Command + 1
- One & Half Spacing = Command + 5
- Double Spacing = Command + 2



Page Set-Up and Margins

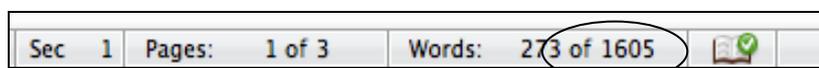
To change the page margins or page orientation:

- From the **Layout** tab in the **Page Setup** group.
- Click on the **Margins**. Select an option from the display or create your own using Custom Margin option. **Note:** Margin sizes are set numerically and measure the distance from the edge of the paper
- Clicking on **Orientation** gives you the option to specify whether the printing will be in *Portrait* or *Landscape*. **Note:** Use Section Breaks to have some pages facing a different way.

Word Count

To view the number of words and lines in a document:

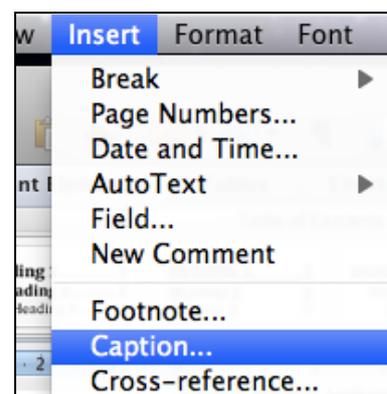
- The Word Count can be viewed on the **Status Bar** at the bottom of the screen.



Add or Delete Captions

A caption is a numbered label, such as "Figure 1" or "Table 1", that you can add to a table, figure, picture, equation or another object in your document.

- Select the item you want to add a caption to.
- On the main word menu select **Insert**, then **Caption**.



- In the **Caption dialog box** that appears, select the options you want. In the **Caption field**, you can type a description of the picture or table (this will also appear automatically in a **Table of Figures**, if you set one up, refer below).
- Existing **Label** options are given for Figure, Table & Equation. Use **New Label** if you want a different label for an object or selection of objects.

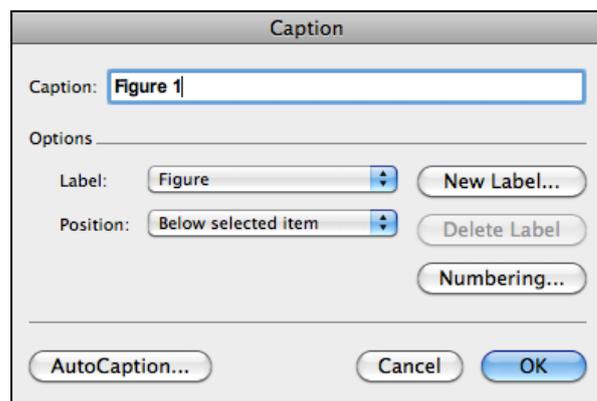


Figure 1-1 Heading and Figure Numbering

- To Delete a caption, first select the caption, then press **Delete** on your keyboard.

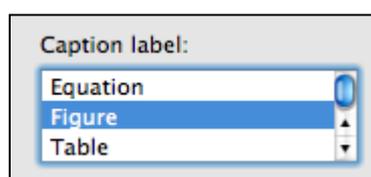
Add in caption numbering? Refers to multilevel heading number and includes the caption number, see caption example above (1-1). To add this select **Numbering** and tick **Include Chapter Number** on the **Caption Numbering dialog box**, then **OK**.

Creating a Table of Figures (using your captions)

A Table of Figures is usually placed after the Table of Contents, for easy reference of any pictures or table descriptions for you or anyone reading your document.

In your document, place the cursor where you want to insert a Table of Figures.

- On the main Word menu, under **Insert**, click **Index and Tables** to reference the captions. Click the **Table of Figures** tab.
- Ensure your **Caption field** here is the same as the label on your **Caption field**.



- Then click **OK**.
- Type in the Heading in a Normal style (not a heading style) and right click Normal and change the font to mimic the Table of Contents heading.

Note: this ensures multilevel numbering does *not* appear on the Table of Figures heading.

Update the Table of Figures

- Select the current table content, by putting your cursor on the **Table of Figures** heading, then Right click on reference and choose update field.
- Click Update page numbers only or Update entire table.

Navigate a document with Navigation

Document headings must be formatted with built-in heading styles in order to display in the Document Map.

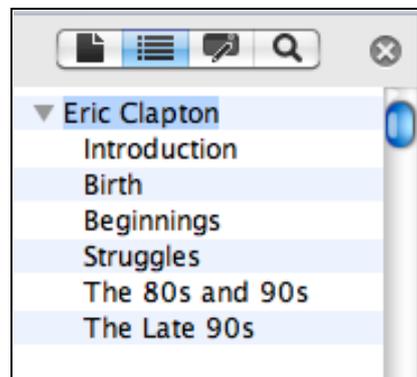
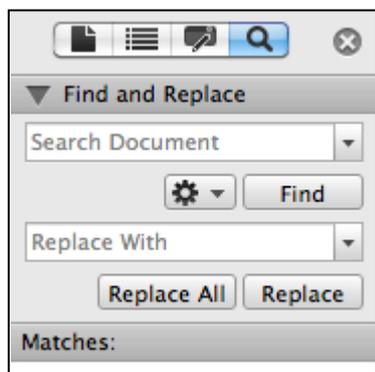
- On the panel above the tabs, click the **Show or Hide the Sidebar** button.



- Then click the **Document Map** icon, this will show the titles in your document.



- To display all headings at a specific level or below, right-click a heading in the **Navigation pane**, then click a number on the shortcut menu that appears beside Show Heading Levels. For example, click Show Heading 3 to display heading levels 1 through 3.
- To collapse the subordinate headings under an individual heading, click the arrow next to the heading.
- To display the subordinate headings under an individual heading, click the arrow next to the heading.
- Click a heading in the **Navigation pane** you want to go to. The insertion point in the document will move to the selected heading.
- Click the magnifying glass called Find and Replace, then ► to open options. Use the **Search Document** option to find a word. You can also activate the replace feature if required.
- When finished, delete the find word/words, then click the Document Map icon to close navigation. Close sidebar with icon or ⊗.



Master documents

A master document contains links to a set of related subdocuments. Use a master document to organise and maintain a long document by dividing it into smaller, more manageable subdocuments. In a workgroup, store a master document on a network to share ownership of a document by dividing it into individual subdocuments.

Understanding master document and subdocument creation

To create a master document, you start with an outline and then designate headings in the outline as subdocuments. You can also add an existing document to a master document to make it a subdocument.

Working with a master document

A master document allows you to create a table of contents, index, cross-references, and headers and footers for all of the subdocuments.

You can use **View** on the main Word menu and select **Master Document**, to work in a master document. For example, you can:

- Expand or collapse subdocuments or change views to show or hide detail
- Quickly change the structure of the document by adding, removing, combining, splitting, renaming, and rearranging subdocuments.

Note: When you select **Master Document**, on **View menu**, the **Home tab** updates with the **Outline Tools group**. Plus, you gain an additional toolbar (shown below) which helps you create subdocuments and link documents etc.

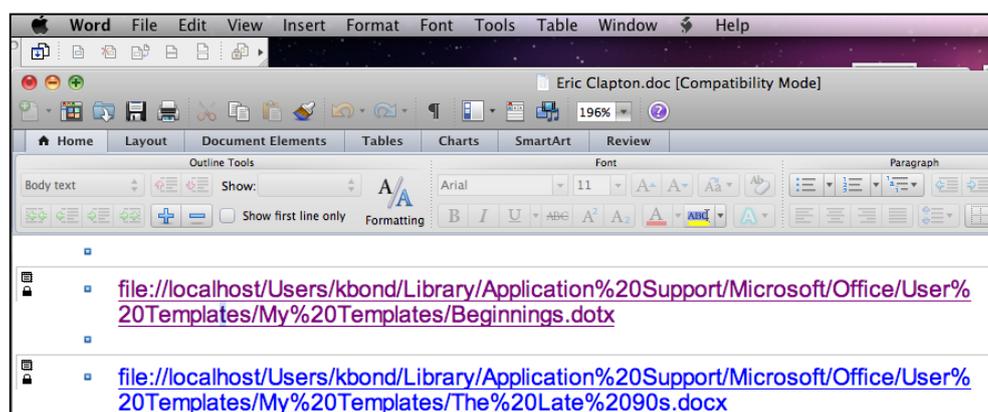


Working with subdocuments

To work with the contents of a subdocument, open it from the master document. When subdocuments are collapsed in the master document, each subdocument appears as a hyperlink. When you click the hyperlink, Microsoft Word displays the subdocument in a separate document window. See image below for

Using templates and formatting in a master document

The template you use for a master document controls the styles used, when you view and print the entire document. You can also use different templates, or use different settings within the templates, for the master document and for individual subdocuments.



Master Document Functions

Button name	Use to
Expanded Subdocuments	Show the actual subdocument content.
Collapse Subdocuments	Show the full file path to the subdocument content.
Create Subdocuments	Create a new subdocument that does not contain text; a subdocument must be embedded after a heading and the Expand Subdocument button activated.
Remove Subdocuments	Remove a subdocument that you no longer want to appear in the master document.
Insert Subdocuments	Insert an existing file to embed as a subdocument; a subdocument must be embedded after a heading and the Expand Subdocument button activated.
Unlink Subdocuments	Delete the link to the subdocument and copy the subdocument content into the master document; to activate, expand the subdocument, click in the subdocument, then click the Unlink button.
Merge Subdocuments	Merge multiple subdocuments into a single document; the content from all subdocuments is merged into the first document; to activate, select all the subdocuments in the document <i>except</i> the first document, then click the Merge button.
Split Subdocuments	Split the content of a subdocument into separate documents; to activate, select the content to split into a new document and then click the Split button.
Lock Document	Lock the document links so that any changes you make to the subdocument content in the master document are <i>not</i> made to the original subdocument stored as a separate file.

- Change the view back to **Print Layout** to close the **Master Document view** and close the toolbars.

Note: If you are unable to edit a subdocument as it is locked and read only, close the master document, reopen just the subdocument. Save previous copies if testing new formats, always have a copy you can return to.

Creating a template

Before starting a template:

- Check with your tutor what the required format for a thesis is:
 - Margins
 - Line spacing
 - Binding
 - Numbering of pages
 - Printing
- Make those changes to the Page Setup.

Include the following in your template:

- Set up Heading styles.
- Number headings using the Multilevel List. This may include the sub-headings.
- Modify the body text if required.
- Check you have Widow/Orphan Control on.
- Page numbering.
- Headers and Footers
- Add captions to graphics, tables and charts.

Saving the template

Once you have all your styles etc set up, you'll need to save them in your template. However, you won't need any of your text in the template - just the Page Setup and style settings.

- Press **command + A** to select all of your text.
- Press **command + X** or click on **Edit** on the main Word menu, then **Cut** to remove the text (and copy it to the Clipboard).
- Click on the **File menu** and choose **Save As**.
- In the **Format box** choose either Word Template or if your document has macros, Word Macro Enabled Template.
- Name your template (eg: Long Documentation or Thesis) and click **Save**.

If you find you need to alter the template in the future, you can always reopen this template file and make the necessary changes. You can also create or redefine a style from within a document.

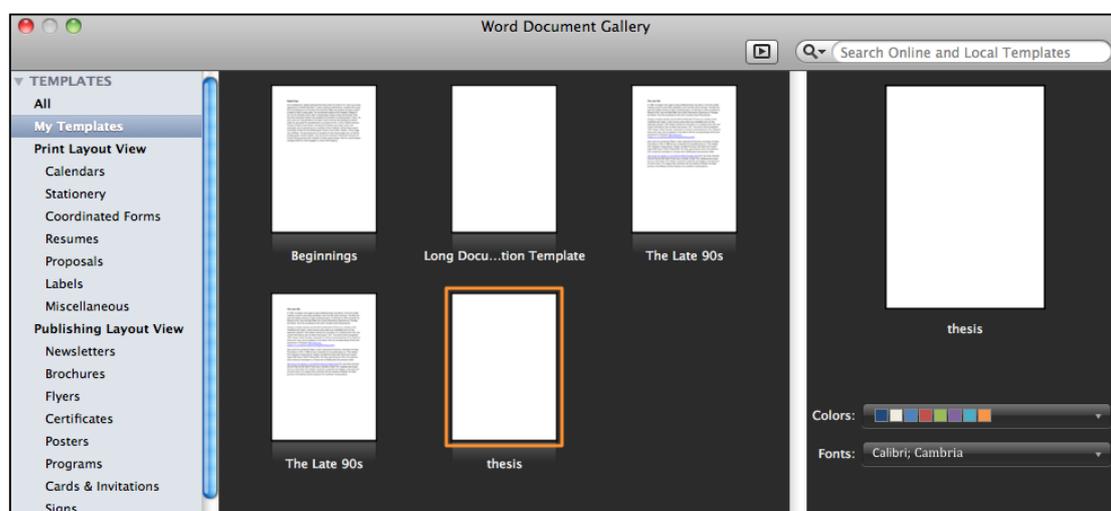
Creating a New File Using the Template

File Button, New, My Templates

To create a new file (based on the template):

- Click on **File menu**, click on **New from Template** from the list. Click on **My Templates** on the left. Then select your template by double-clicking or click, then select **Choose button**.

The Templates window which appears allows you to create a New Document using a particular template. The default Blank Document uses Normal.dot; you want one using your own thesis.dotx or thesis.dotm (if saved as a **Word Macro Enabled Document**).



- Then select your template by double-clicking, or click once, then select **Choose** button.

A new blank document will appear, ready for you to start typing your text. Save the template as a normal document.