# Formatting documents in Microsoft Word

Using a Windows Operating System

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# 1 Introduction

Microsoft Word has built-in document structuring tools that can be used to format your document. This guide outlines several built-in tools that can be applied to structure your thesis.

By using built in formatting you can also improve the Accessibility of your document.

Please refer to the Office of Graduate & Postdoctoral Studies Thesis Completion Guide for specific requirements related to the format of your thesis.

Note: These instructions were written using Microsoft Word 2016 running on a Windows operating system. Tool location and availability of options may vary depending on software version and operating system.

# 2 Formatting

## 2.1 Creating chapters and sections using Styles

When creating chapters and/or sections in your document, use heading **Styles** to organize and provide hierarchical structure to the document. By applying heading Styles you will be able to automatically generate a Table of Contents based on the defined headings.

Styles are located under the **Home** tab, within the **Styles** group.

Use the styles Heading 1 to Heading 9, to create sections and sub-sections in your document.

Tips to keep in mind when using styles:

- A pre-defined style can be modified (e.g. change font size, line spacing)
- A new style can be created
- When applying heading styles, headings must be nested properly.
    - For example Heading 1 should be followed by Heading 2 and Heading 3 cannot be used unless immediately preceded by Heading 2. See the example below of properly nesting headings

**1 « Title of First Chapter – uses Heading 1 »**

«Use Styles to delineate sections within the chapter. You can use a numbering system if you wish. Below is an example of using Styles to create sections and sub-sections. »

**1.1 « Title of section – uses Heading 2 Style »**

« This is Chapter 1, Section 1.1. Use the Normal Style for text. »

**1.1.1 « Title of section – uses Heading 3 Style»**

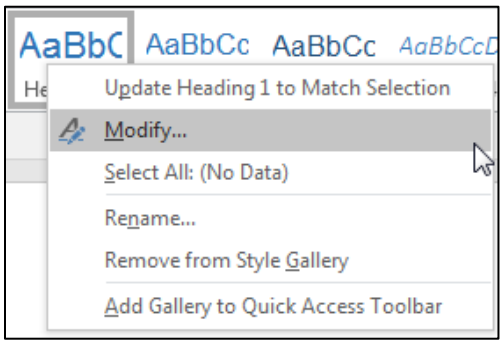
« This is Chapter 1, Section 1.1.1. Use the Normal Style for text. »

**1.2 « Title of section – uses Heading 2 Style »**

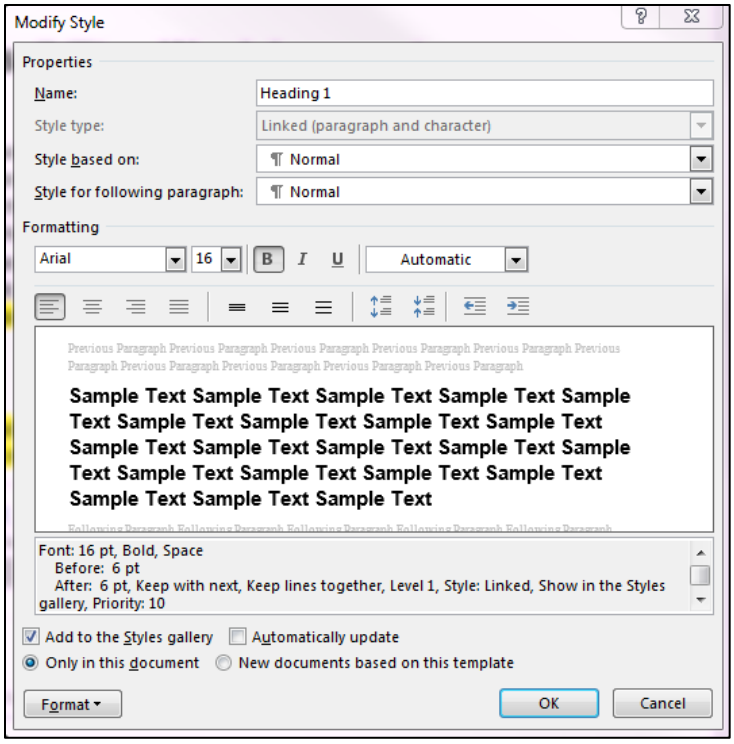
« This is Chapter 1, Section 1.2. Use the Normal Style for text. »

### 2.1.1 Modify a style

You can adjust a pre-defined style by right clicking on the style name and selecting **Modify** from the drop-down menu.




- Adjust the options in the **Modify Style** window as required



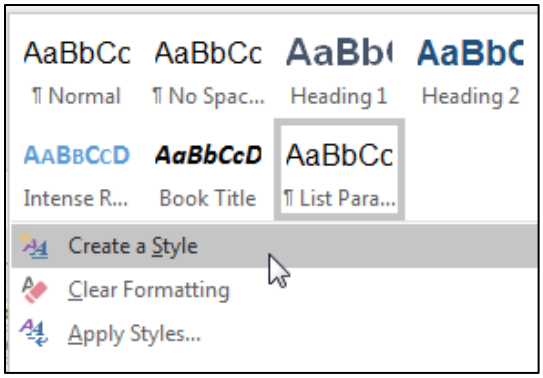

- To set paragraph and line spacing, click on the **Format** button at the bottom of the **Modify Style** window and select **Paragraph**

### 2.1.2 Create a new style

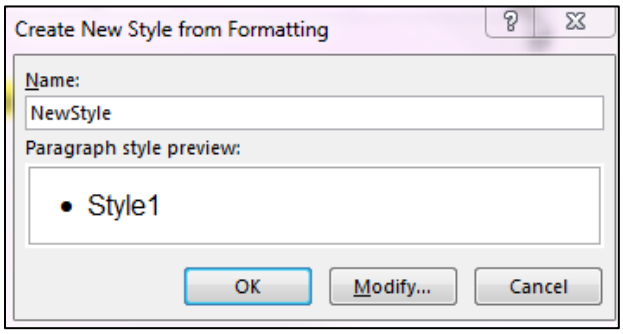
You can create your own styles.

- Expand the Styles tool bar by clicking on the drop-down arrow on the bottom right of the tool bar.

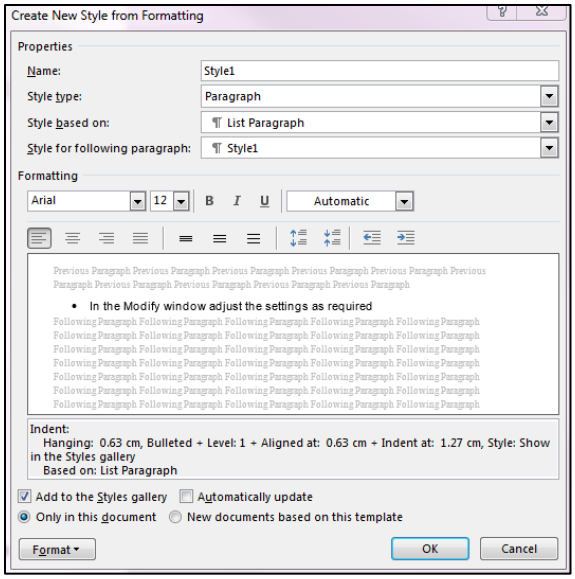
- Select **Create a Style** from the list




- In the **Create New Style from Formatting** window, add a name for the style




- Click on **Modify**
- In the **Create New Style from Formatting** window adjust the settings as required
- Note, when you create a new style it will automatically be assigned the same properties as the style you previously working in. Use the **Style Type** and **Style Based On** options in the Modify window to adjust the style properties.
- To set paragraph and line spacing, click on the **Format** button at the bottom of the **Create New Style from Formatting** window and select **Paragraph**

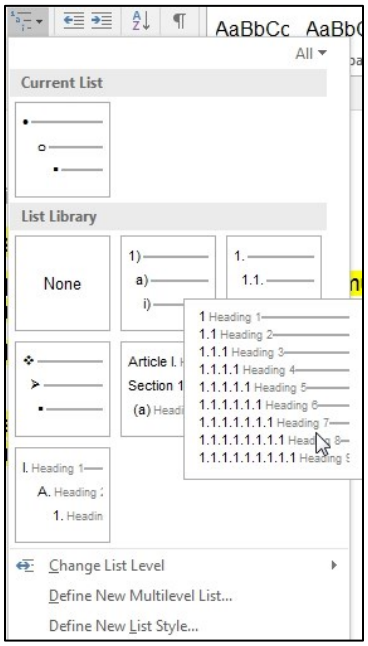



## 2.2 Automatically number chapters and sections

Note: In the ETD Template, is set to auto-generate chapter numbers.

- Ensure your chapter titles are assigned Heading 1 style
- In the Home tab of the main menu bar, in the Paragraph group, select the **Multilevel List** icon

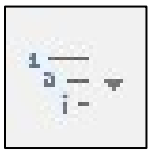
- Select a design from list library that uses heading styles



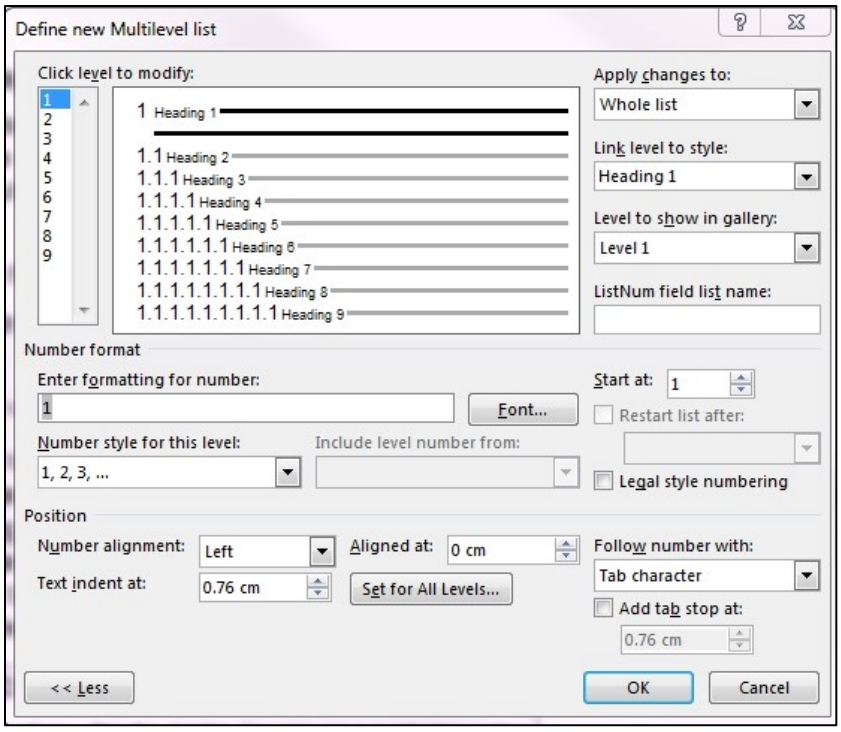
- The heading styles should now be updated and include numbering
- All text assigned a heading style will be automatically numbered

### 2.2.1 Remove automated numbering of chapters and sections

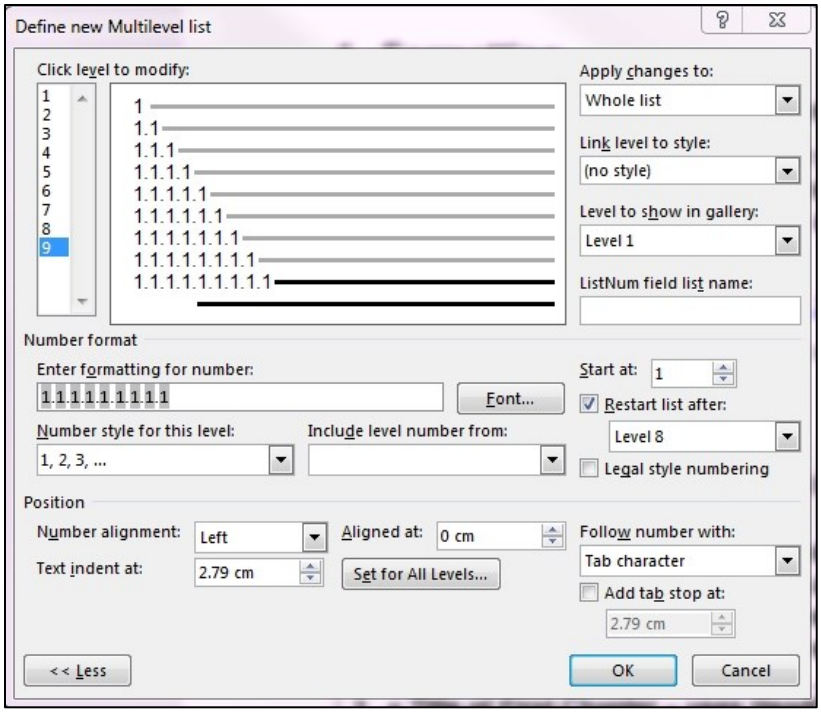
- Place your cursor in front of the first Heading 1 of the document
- In the Home tab of the main menu bar, in the Paragraph group, select the **Multilevel List** icon



- Select **Define New Multilevel List** from the drop-down menu



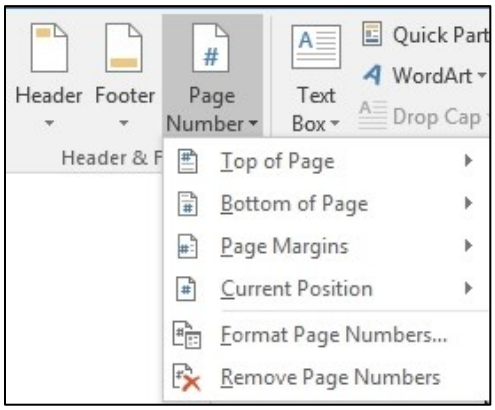

- In the Define New Multilevel List window, set **Link level to style** to **(no style)** for each numbering level




- Click **OK**

## 2.3 Adding page numbers

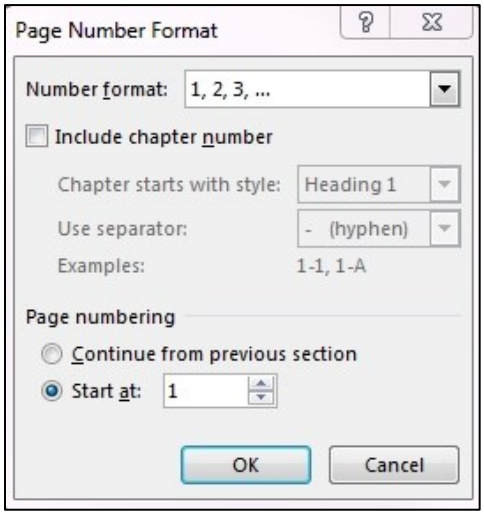
- Select the **Insert** tab from the main menu bar
- Select the **Page Number** icon in the **Header & Footer** group
- You can choose the placement of the page number on the page
    - Top of Page
    - Bottom of Page




- You can set the format of the page number under **Format Page Numbers**
    - In the **Page Number Format** window, select a **Number Format** from the drop down menu (e.g. numbers, Roman numerals, letters)

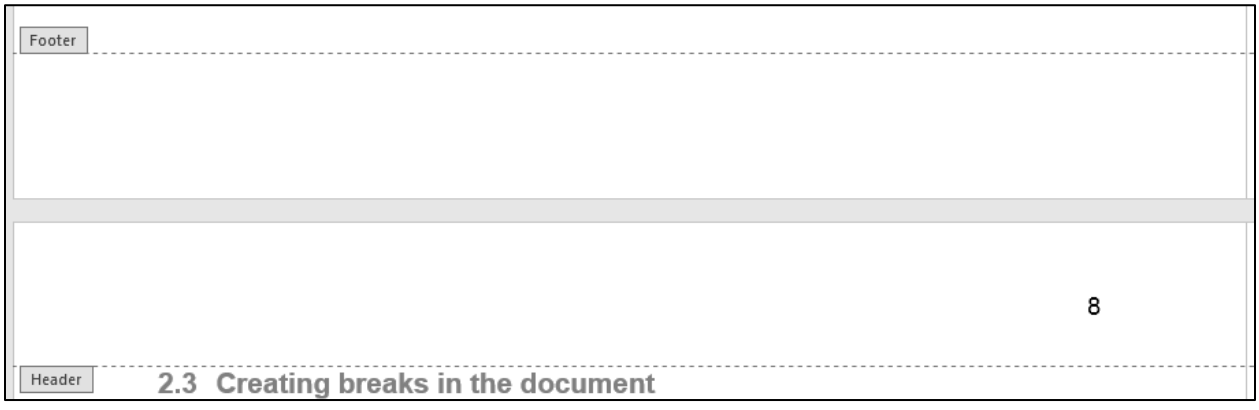
### 2.3.1 Change page numbering after a section break

- Insert a Section Break (Please See Section 2.3.2 for instructions on creating a Section Break)
- Double click in the area around a page number in the new section to open the Header & Footer tool bar.
- Select **Page Number** then **Format Page Number**
- Choose the **Number format**
- If you want the page numbering to continue from a previous section select **Continue from previous section**
- If you want to start a new numbering, select **Start at:** and indicate the number you would like the numbering to start with

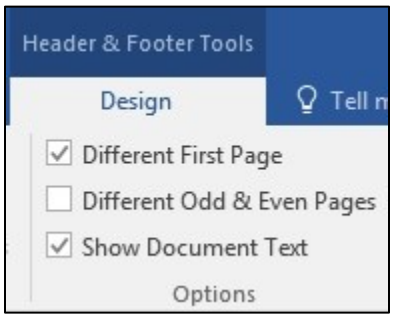



### 2.3.2 Suppressing a page number

- Create sections breaks before and after the page you wish to suppress the page number for (Please See Section 2.3.2 for instructions on creating a Section Break.)
- Open the header/footer for the page by double clicking in the area around the page number you want to suppress



- The Header & Footer Tools Design tab will open. In the **Options** section, click on the radio box for **Different First Page**. The page will still count as a page in the Table of Contents but the number will no longer appear on the page




- Either select the **Close the Header and Footer** button in the Design tab, or double-click anywhere outside the header/footer.

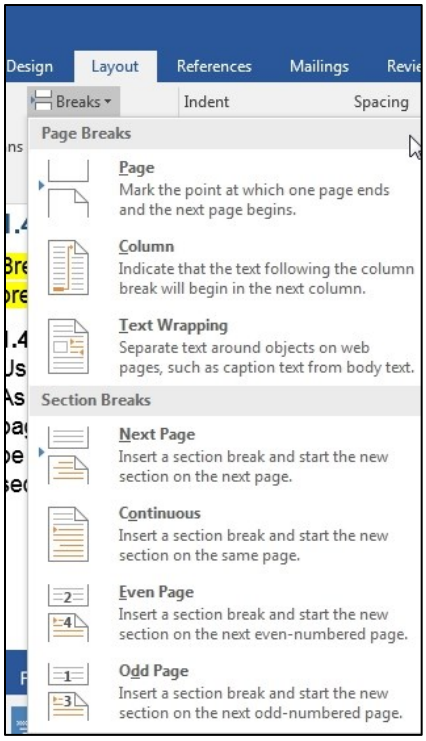
## 2.4 Creating breaks in the document

Breaks can be used to start a chapter or section on a new page or to create a 'section break' in the document.

### 2.4.1 Page Breaks

Use page breaks to start a new page (instead of hitting the enter button several times). As noted in the general format instructions for theses, subheadings at the bottom of the page must have at least two full lines of text below it, otherwise the subheading should be moved to the next page. In such cases, a page break could be used to move the section to a new page.

- Place your cursor where you would like to insert a page break (e.g. at the beginning of a section title)
- Select the **Layout** tab from the main tool bar
- Select **Breaks** from the **Page Setup** group
- Select **Page** from the drop-down menu




### 2.4.2 Section breaks

Section breaks can be used to change the layout or format of a document. For example, section breaks can be used to divide the document into different parts when you need to assign different page numbering formats.

- Place your cursor where you would like to insert a break (e.g. at the beginning of a section title)
- Select the **Layout** tab from the main tool bar
- Select **Breaks** from the **Page Setup** group
- Select **Next Page** from the drop-down menu

#### *2.4.2.1 Removing the link between sections*

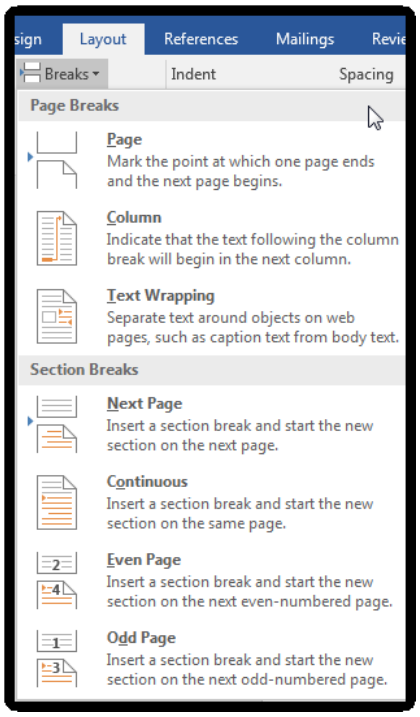
By default a new section is linked to the previous section. If you need a different header or footer between sections (e.g. placement of page numbers different between sections) you will need to remove this link.

- Open the header/footer for a page within a section by double clicking in the area within the upper or lower margin of the page
- Click within header (or footer)

- In the Header & Footer Tools menu, within the Navigation group, select **Link to previous**. This will remove the link between the current section and the previous section for the header (or footer).
- Change the formatting of the header (or footer) as required. When complete, close the header/footer

### 2.4.3 Other types of breaks

- Select the **Layout** tab from the main menu bar
- Select **Breaks** in the **Page Setup** group
- You can select from different types of **Page Breaks** or **Section Breaks** options

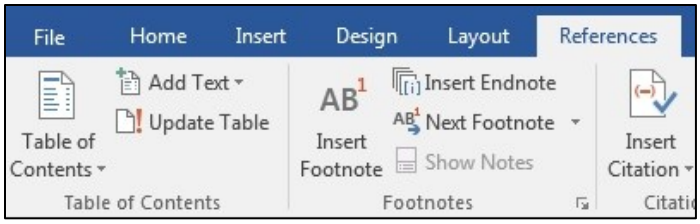



## 2.5 Automatically generate a Table of Contents

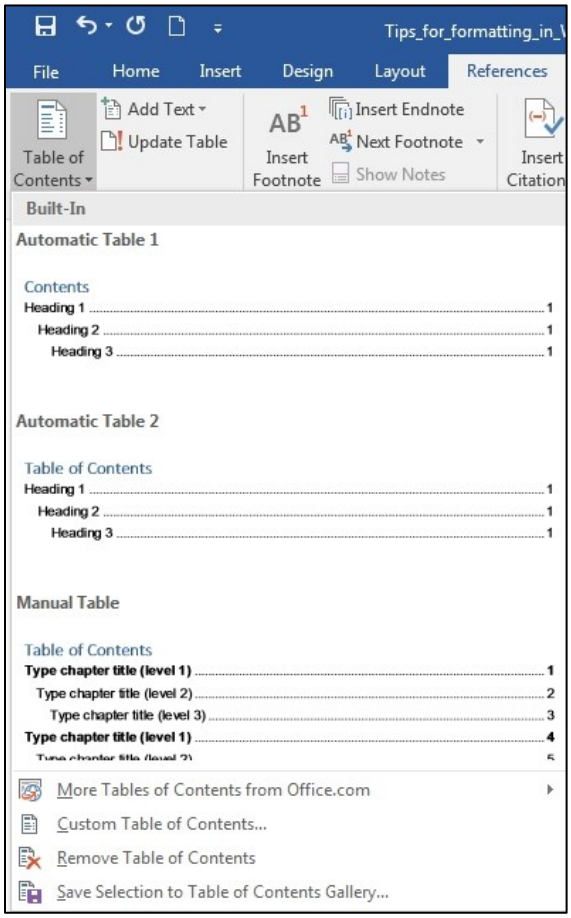
Only text that has been assigned a Heading Style (e.g. Heading 1 to 9) will be included in the Table of Contents (TOC). After creating the TOC, if text is showing up that should not be included (e.g. body text), make sure this text is assigned the Normal style.

### 2.5.1 Create a Table of Contents

- Select the **References** tab from the main tool bar
- In the Table of Contents group, select the **Table of Contents** icon.

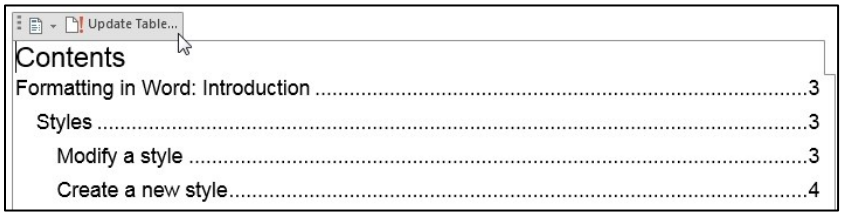



- Chose a style from the drop down menu, or create a custom design.

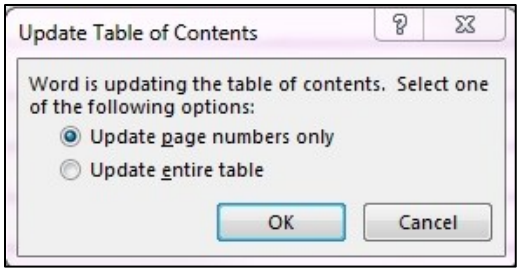



### 2.5.2 Update a generated Table of Contents

- Click on the Table of Contents
- In the top left corner, select **Update Table**




- Select either **Update page numbers only** or **Update entire table**




- Click **OK**.

## 2.6 Changing the orientation of a page

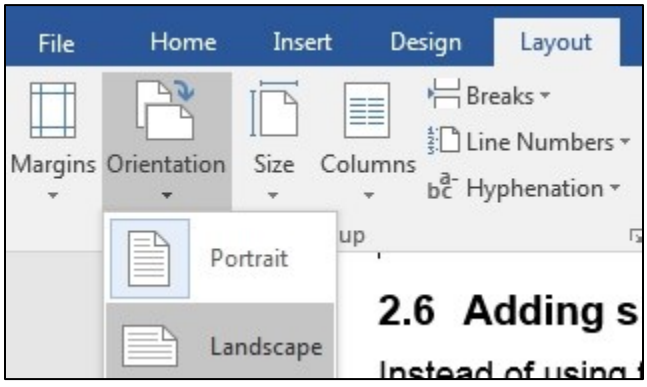
To change the orientation of a page, you first need to insert a section break both before and after the page.

To insert section breaks:

- Place your cursor at the beginning of the section you want to break
- Select the **Layout** tab in the main menu bar
- Select **Breaks** from the Page Setup group
- Select **Next Page**
- Repeat steps after placing cursor at the end of the section you wish to break

To change the page orientation:

- Click on the page you want to orient
- Select the **Layout** tab from the main menu bar
- In the Page Setup group, select **Orientation**
- Select **Landscape** from the drop-down menu



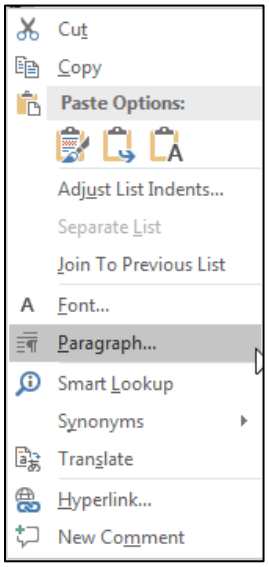

Note: If section breaks were not used, all pages that are included in that section of the document will be re-oriented.

## 2.7 Adding spacing to the document

Instead of using tabs, spaces and carriage returns (i.e. hitting the enter button) to add formatting into a document, use the **Paragraph** menu to apply formatting to selected text or to modify a Style's settings to apply formatting to all text assigned to that style.

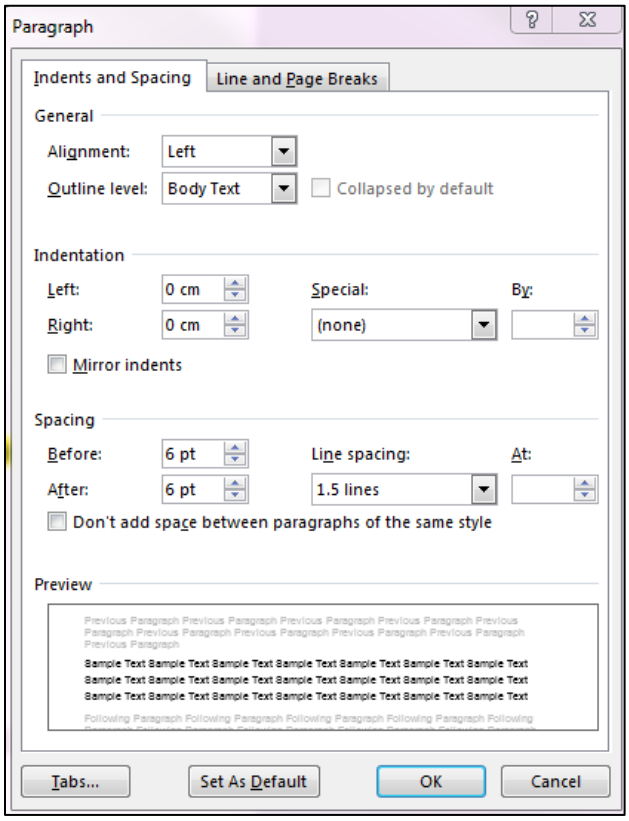
### 2.7.1 Apply formatting/spacing to selected text

- Highlight the text
- Right click and select **Paragraph** from the drop-down menu




- In the Paragraph window, use the options to set formatting and spacing
    - Under General
        - Set the alignment of the text (e.g. align left, centred, align right, justify)
        - Outline level
            - If the text highlighted has been assigned a heading style, the outline level will match the heading level (e.g. Level 1 to 9 matches Headings 1 to 9)
            - All other text will have an Outline Level of Body Text
    - Under Indentation
        - Set the **left/right** indentation
        - Use the **Special** option
            - To apply indentation to the **First line** only
            - To create **Hanging** lines (where all lines after the first are indented by a set amount)
    - Under Spacing
        - Use **Before** and **After** to set the amount of space between individual paragraphs – 6pt works well

- Use **Line spacing** to set the amount of spaces between lines within a paragraph – 1 to 1.5 lines works well




### 2.7.2 Apply formatting/spacing to a Style

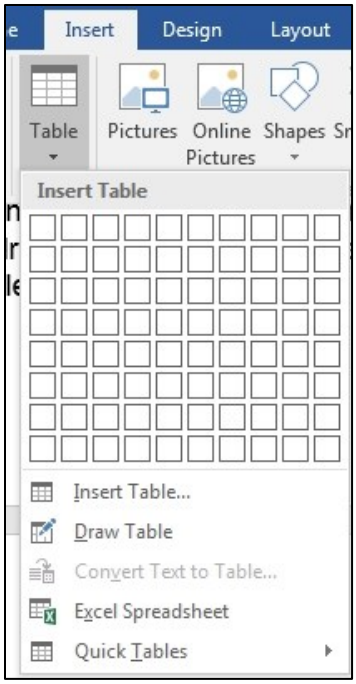
- To set formatting and spacing to a style, right click on the style in the Styles menu
- Select **Modify** from the drop-down menu
- In the **Modify Style** window, click on the **Format** button at the bottom of the window and select **Paragraph**
- Apply settings as required
- Click **OK**

## 2.8 Creating and captioning tables

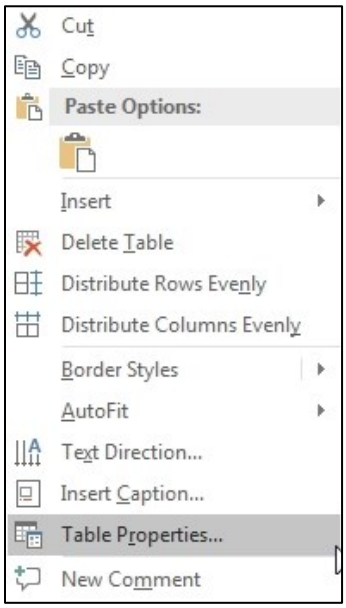
Tables can be created and captions in Word. For Accessibility purposes, it is a best practice to create tables directly in Word as opposed to inserting an image/screen-capture of your table.

### 2.8.1 Creating a table

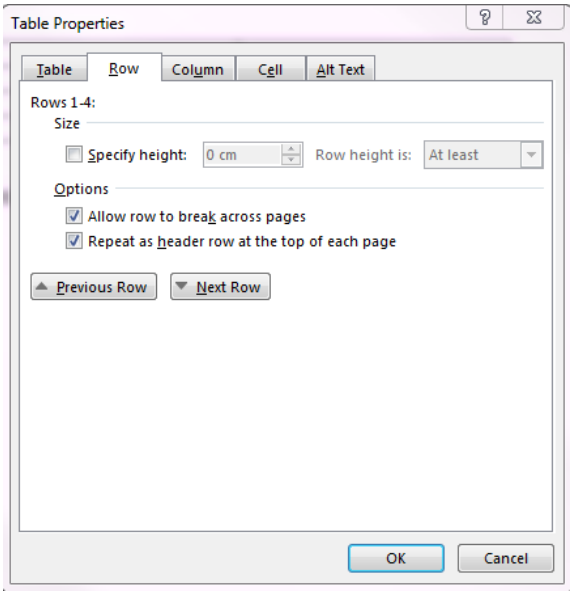
- In the Insert tab of the main menu bar, select Table
- A drop-down menu will open allowing you to select the size and design of the table.




- Highlight the table and right click. Select **Table Properties** from the drop-down menu.
    - Note that there are several options in this drop-down menu for adjusting the design of the table (e.g. Text direction, Row/Column distribution, Borders)




- Select the **Row** tab. Under options, make sure both '**Allow rows to break across pages**' and '**Repeat as header row at the top of each page**' are selected.




Note: it is a best practice not to create merged cells in a table. Using merged cells decreases the Accessibility of your document as it is hard for Adaptive Technology (e.g. screen readers) to understand and read back merged cells.

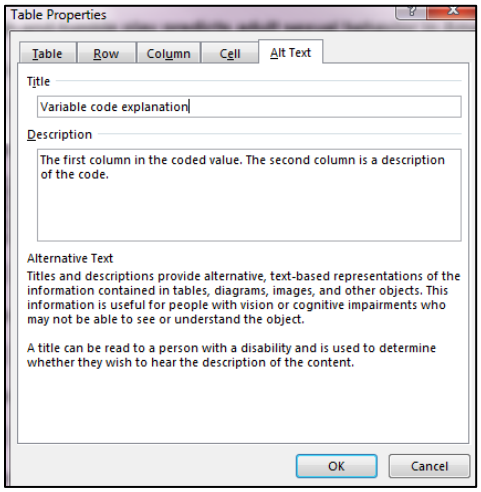
*2.8.1.1 Adding alternative text to a table*

To improve the Accessibility of your thesis, you can add alternative text to your tables.

Alternative text is a word or phrase that describes the nature or content of the table. Alternative text is read by screen readers allowing the content and function of the table to be accessible to those with visual or cognitive disabilities. Refer to WebAIM's Alternative Text guide for more information about creating alternative text.

Note that the alternative text should not repeat captioning text (e.g. table caption).

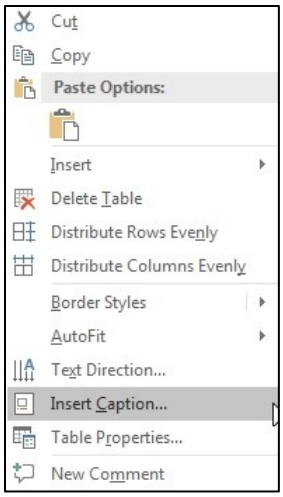
- Select the **Alt Text** tab. Add a name for the table in the **Title** text box and a brief explanation of the table in the **Description** text box.



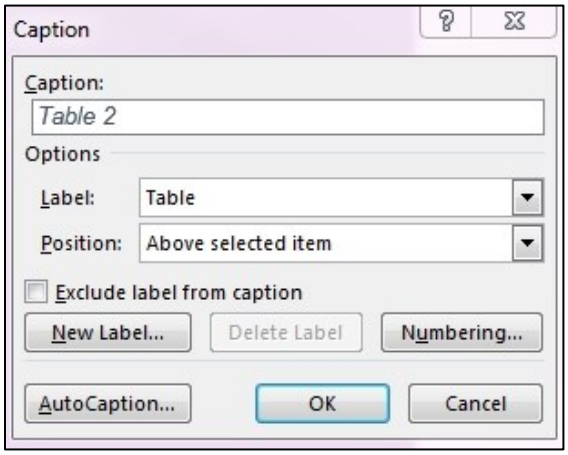
- Click **OK**.

### 2.8.2 Captioning a table

- Select the table
- Right-click and select **Insert Caption** from the menu.




- In the Caption window, under **Caption**, enter a description of the table. The table numbers will automatically be numbered consecutively
- Set the **Label** to **Table**
- You can select the position of the caption, generally a table caption is '**Above selected item**'



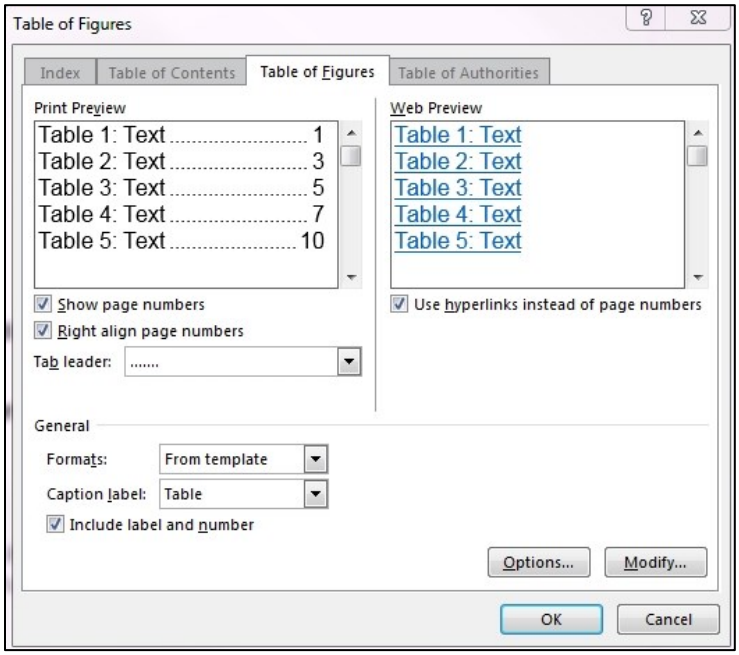

- Click **OK**

### 2.8.3 Create a listing of tables

A listing of tables can be created if you added captions to the tables.

- Select the **References** tab
- In the Captions group, select **Insert Tables of Figures**

- In the Table of Figures window, set the **Caption label** to **Table**

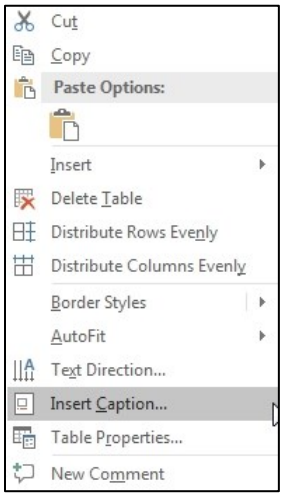



- Click **OK**

## 2.9 Creating captions and lists for figures

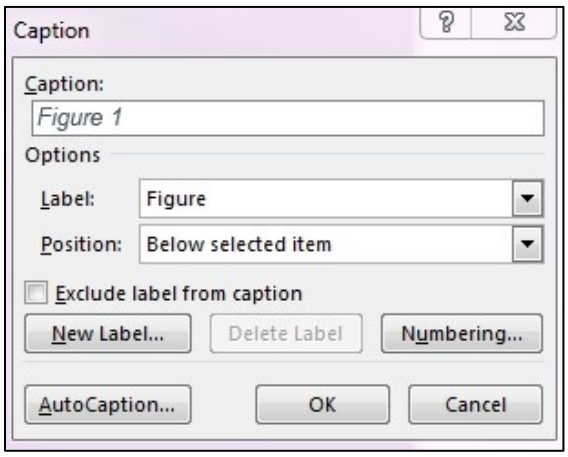
### 2.9.1 Creating captions for figures

- Select the figure and right click.
- Right-click and select **Insert Caption** from the menu.




- In the Caption window, under **Caption**, enter a description of the figure. The figure numbers will automatically be numbered consecutively
- Set the **Label** to **Figure**

- You can select the position of the caption, generally a figure caption is '**Below selected item**'

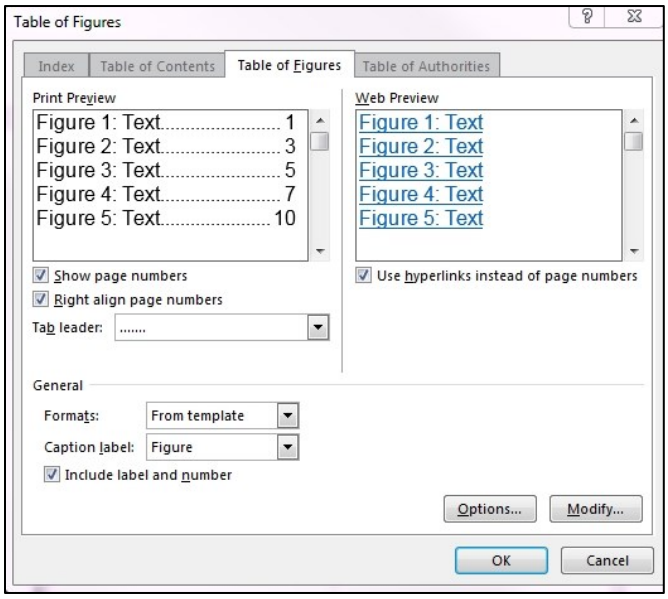



- Click **OK**

### 2.9.2 Create a listing of figures

A listing of tables can be created if you added captions to the tables.

- Select the **References** tab
- In the Captions group, select **Insert Tables of Figures**
- In the Table of Figures window, set the **Caption label** to **Figure**




- Click **OK**

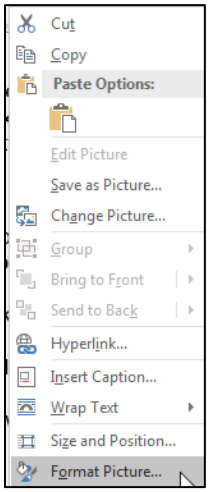
### 2.9.3 Adding alternative text to figures

To improve the Accessibility of your thesis, you can add alternative text to your figures.

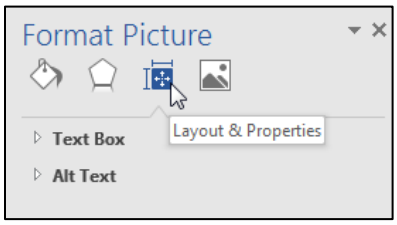
Alternative text is a word or phrase that describes the nature or content of the figure. Alternative text is read by screen readers allowing the content and function of the figures to be accessible to those with visual or cognitive disabilities. Refer to WebAIM's Alternative Text guide for more information about creating alternative text.

Note that the alternative text should not repeat captioning text (e.g. figure caption).

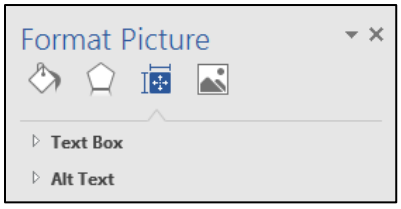
- To add alternative text, right click on the figure and select **Format Picture** from the drop down menu



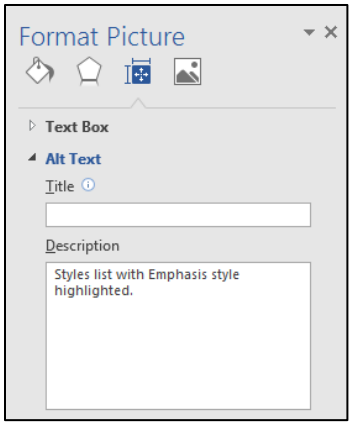

- In the Format Picture window select the **Layout & Properties** icon




- Select **Alt Text** from the list




- Write a description of the image within the **Description** text box




*2.9.3.1 Figures with overlaid graphics*

If someone is using Adaptive Technology to view your document, screen readers will register images with graphics overlaid as several separate items. The context of a graphic, such as a box or arrow, used to highlight a portion of the image will not be apparent to the screen reader.

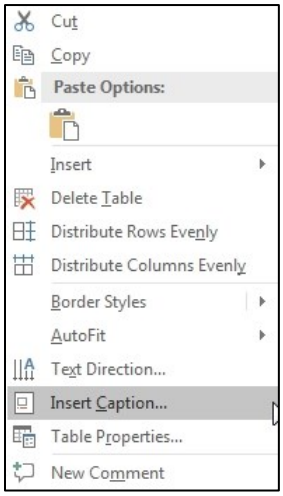
It is a best practice to use image editing software (e.g. Photoshop) to add graphics to an image, to group all the items together and save as a single item.

## 2.10 Creating captions and lists for other object types

Other objects may include plates or illustrations.

### 2.10.1 Creating captions for other objects

- Select the object and right click.
- Right-click and select **Insert Caption** from the menu.




- In the Caption window, select the **New Label** button
- In the New Label window, enter the label title (e.g. Plate) and click **OK**.

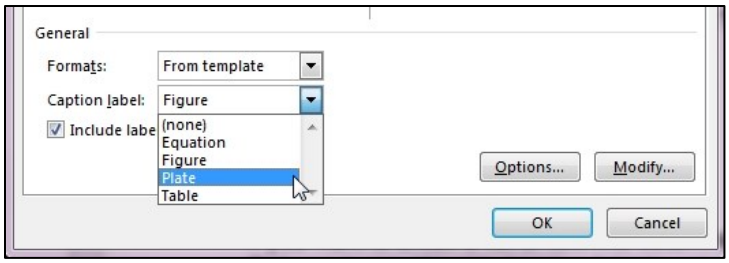
- The new label will now be an option in the Label menu

- Under **Caption**, enter a description of the object. The object numbers will automatically be numbered consecutively
- Select the position of the label
- Click **OK**

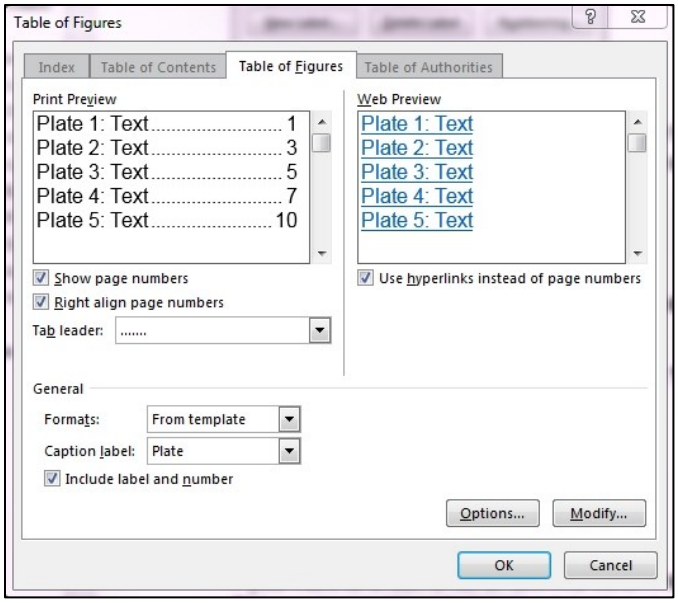
### 2.10.2 Create a listing of objects

A listing of tables can be created if you added captions to the tables.

- Select the **References** tab
- In the Captions group, select **Insert Tables of Figures**
- In the Table of Figures window, set **Caption Label** to the object label (e.g. Plate)




- Click **OK**

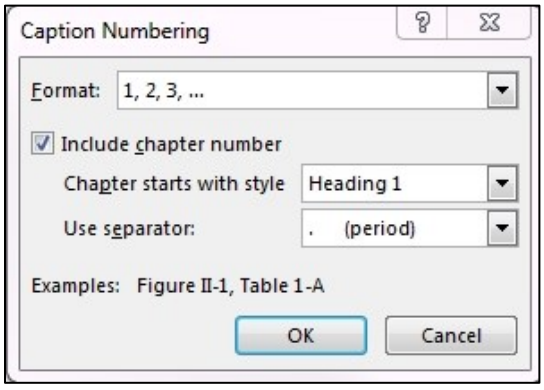



## 2.11 Including chapter numbers in captions

To include chapter numbers in your captions, one of your heading styles must be set to automatically generate chapter numbers. See Section 2.15 for instructions on how to auto-generate chapter numbers.

Note: In the ETD Template, Headings 1 is set to auto-generate chapter numbers.

- Select an object in your document (e.g. table, figure, etc.) and right click
- Select Insert caption from the drop-down menu
- In the Captions window, select **Numbering**
- Check off the radio box for **Include chapter number**
- Under **Chapters starts with style**, select the **Heading 1**
- Under **Use separator**, select a delimiter (e.g. hyphen, period, colon)

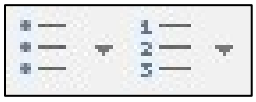



- Click **OK**

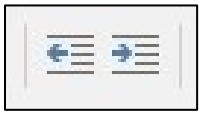
## 2.12 Creating formatted lists

To create a formatted list use:

- The **List Paragraph** style, or
- The **Bullets** or **Numbering** tools accessed through the Paragraph menu of the Home tab in the main menu bar.



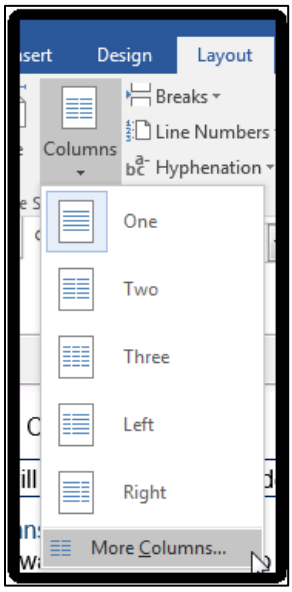
To create nested lists, use the **Increase Indent** or **Decrease Indent** tools.



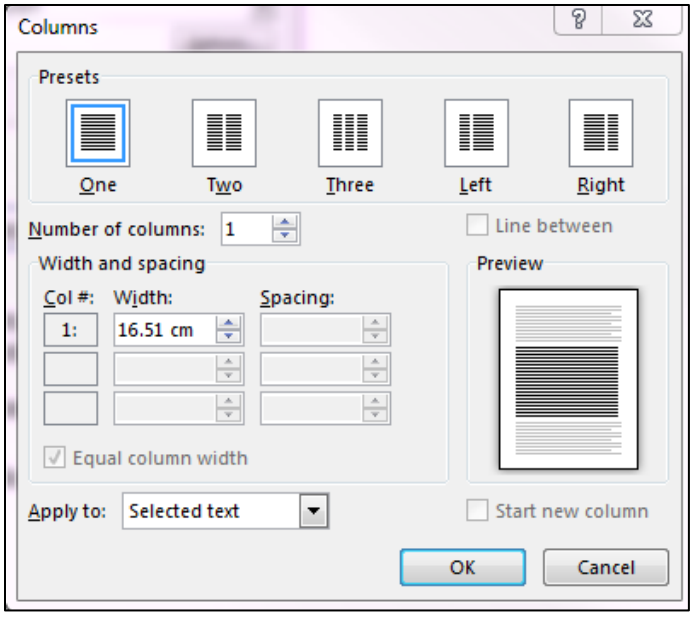
## 2.13 Creating columns out of lists

To break a list of text into multiple columns, use the Column tool.

- Highlight the text you want to break into columns
- Select the **Layout** tab in the main menu bar
- Select **Columns** in the Page Setup group
- Select the number of columns you wish to create or the **More Columns** option




- If you select the More Columns option you can set the number of columns, the width and the spacing of the columns

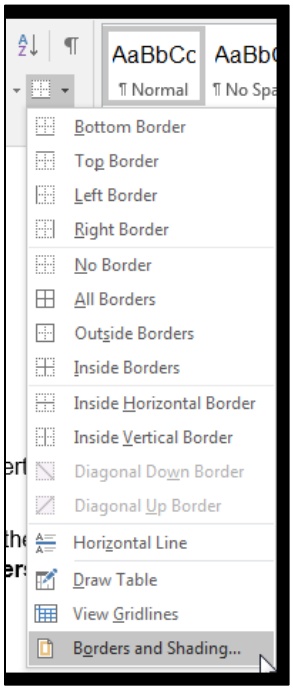



- Click **OK**

## 2.14 Adding borders around text

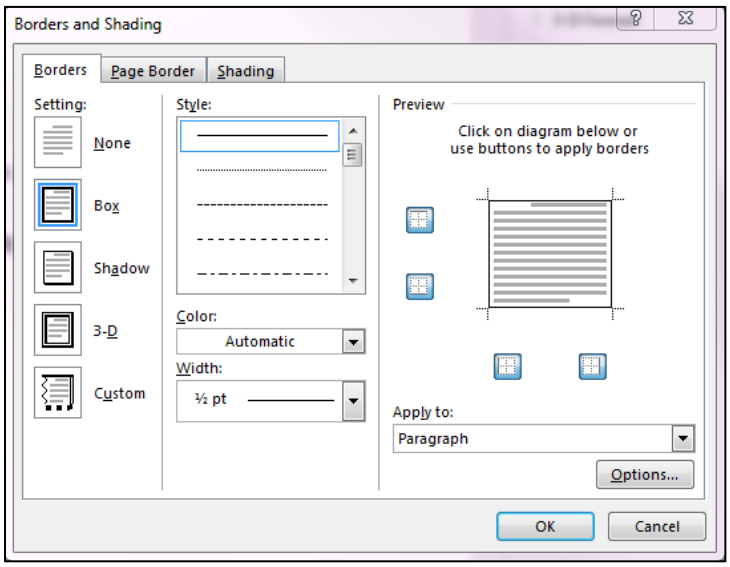
If you want to emphasize a portion of text, instead of using text boxes or inserting lines to show a break in the text, place a border around the text.

- To add a border around a group of text, highlight the text.
- From the **Borders** drop-down menu, select **Borders and Shading**




- Select the **Borders** tab

- Under **Setting**, select **Box**
- Set the style, colour and width of the border
- Under **Apply to**, set as **Paragraph**




- Click **Ok**

You will end up with text inside of a box.

## 2.15 Adding hyperlinks

Links should be embedded within the text of the document. The text of the link should clearly describe what the link is.

**Example of a good link insertion**

In the following example, the link itself fully describes what the link is directing too without needing the surrounding text for context.

…"the University of Guelph's Accessibility Resources – Document Accessibility webpage provides a variety of guides for making accessible documents."

## 2.16 Font

- New Times Roman or Arial are the preferred font types
- Use a font size of 12 pt. for normal text
- Larger font sizes can be used in headings
- Non-standard typefaces, such as script, should not be used except for commonly accepted symbols

### 2.16.1 Bold

- To add bolding, highlight the text you want to bold and apply the **Strong** style to the selected text

### 2.16.2 Italics

- To add emphasis, highlight the text you want to bold and apply the **Emphasis** style to the selected text

- There is also a **Subtle Emphasis** and **Intense Emphasis** style

## 2.17 Show hidden code

It is sometimes useful to see hidden codes that mark formatting such as paragraphs, tabs, page breaks and section breaks within the document.

- In the Home tab of the main menu bar, select the **Show/Hide ¶** icon from the Paragraph group.

- To hide the codes, click on the **Show/Hide ¶** icon again.

## 2.18 Clear formatting

To remove formatting from selected text, highlight a portion of text and click the Clear All Formatting icon located within the Font section of the Home tab.