

Advanced Formatting with Microsoft Word

General Issues in Formatting a Document

Appearance as you type on the screen may not accurately reflect appearance on paper, especially in regard to text spacing and alignment. Fonts may also appear differently depending on the printer you use. For these reasons, you should always:

1. Use tabs rather than multiple spaces to line up text. (Turn on Show/Hide Paragraphs to view tabs, spaces, paragraph marks, and section or page breaks.)
2. Work in Page Layout view to see how the document is laying out on the page.
3. Use **Print Preview** under the **File** menu to see exactly how the document will appear when printed on your currently selected printer.

Creating Bullets

Simple bullets can be inserted from the bullet button on the toolbar. For more options, select **Bullets and Numbering** under **Format** menu. Set the type of bullet, changing point size and hanging indent as desired. A sample will show you a preview of the options you select. Then click **OK** to return to your document. (Bullets are paragraph settings, so hitting a carriage return after a bulleted line will begin another line with the same type of bullet.)

After you have created all the lines you want to have bullets, hit a carriage return. You'll see the line has a bullet, but if you click the bullets button again, this toggles the bullets off. In **Word97**, you can hit return twice and the bullets will toggle off.

Sections

Dividing your document into sections is useful when you want to include one or more different page layouts within the same document. For example, you might vary the following page layout settings for individual sections of one document:

- Page number format
- Position of headers and footers
- Location of footnotes
- Line numbering
- Number of columns

You create sections in your document by adding section marks. Section formats affect the text that is between two section marks. You can select a section mark and copy it to another location to duplicate layout settings between different sections, or remove it with the delete key.

A soft page break is inserted by Word when your text spills over the bottom margin of a page; a hard page break is one you can insert manually to force a new page at a certain point in your file. (In **Normal** view, soft page breaks appear as a single dotted line across the page; hard page breaks appear as a dotted line with the words "Page Break" in the middle.) By inserting a hard page break, you can ensure that the page will end exactly where you put it relative to your text. If instead you use multiple carriage returns until a soft page break appears, later editing is liable to move your text to undesired positions relative to the end of the page.

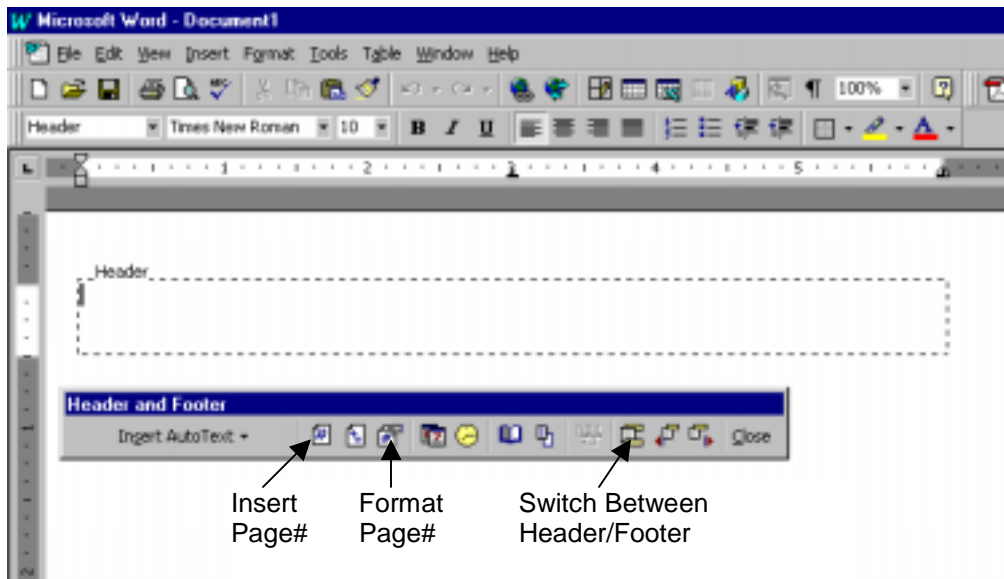
To start a new page with a hard page break, choose **Break** from the **Insert** Menu; in the dialog box, select **Page Break** and click OK. Hard page breaks can be moved like text, by highlighting them with the mouse and choosing delete, cut, or copy.

If you want to apply different page formatting to a new page, you must use a section break. Use Break→Section→Continuous when you want to change the number of columns displayed on the current page. Or, use Break→Section→Next Page when you want to change Headers or Footers in a section.

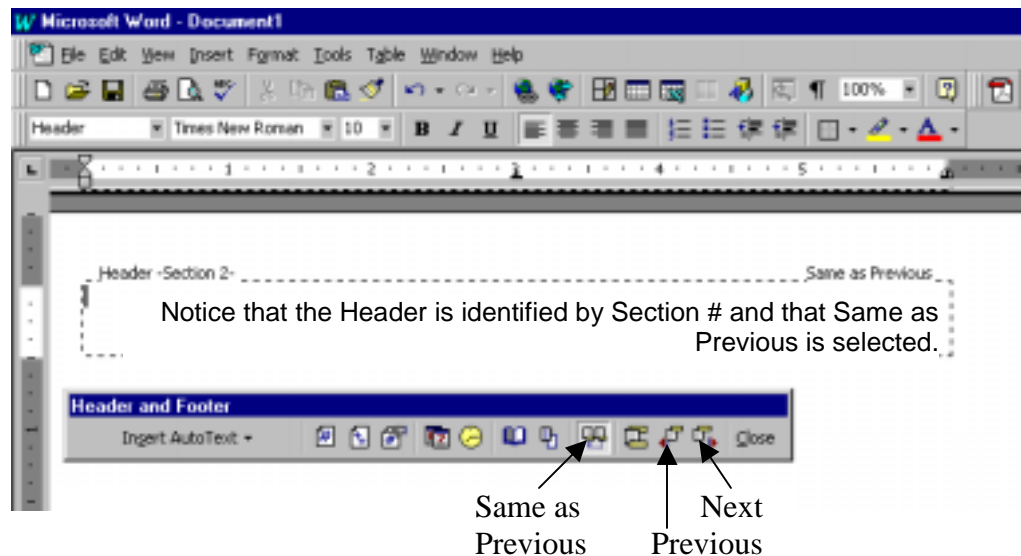
Headers/Footers and Page Numbers

Adding page numbers to a document with a single section is simple. Just select Page Numbers from the **Insert** menu, and you will be presented with some positioning and formatting options. However, if you create a document that contains a title page, a dedication page, a table of contents, some introductory text, then the body of the paper, followed by the bibliography—you might want to use different styles of page numbering in each of these sections, or none at all in some. Using the section breaks as described above, you can create multiple page numbered section styles. If you have a rather large document, with sections like chapters, you can even create different section headers that show the chapter headings on each page.

From the View Menu, select Headers/Footers. If you have only one section, you will see the following.



If you have added a Section Break→Next Page to the document, the Header/Footer view and toolbar will change slightly.



You will get the best results the first time if you **deselect** the “Same as Previous” button **before** adding page numbers as footers to a section. Use the “Next” and “Previous” buttons to move forward and back through the different section Headers and Footers to correct mistakes in adding page numbering to other sections. Format section footers as you like. (e.g. i, ii, iii for beginning pages, 1,2,3 for body text pages, or no page numbering at all in other sections.)

In each section you can also choose to make the first page different. (e.g. no number on the first page of the section) To choose this, select Page Setup from the File menu. On the Layout tabbed page, select “Different first page.” Note that you can also choose to include different even and odd Headers and Footers. (book or journal style, with alignment alternating between the right and left pages)

Footnotes

Creating a footnote

1. Position the insertion point where you want the footnote reference mark.
2. Choose **Footnote** from the **Insert** menu.
3. Click **Auto Number** to automatically give the footnote the next sequential number.
4. To create your own reference mark, type up to 9 characters in the footnote “custom mark” box.
5. Click options to alter the number you would like the footnotes to start at.
6. When finished setting the options, keep clicking **OK** until you are back at the document window. The footnote window will appear at the bottom of the screen.
7. Type your footnote text at the reference mark in the footnote window.
8. To add a footnote separator line, you must be in Normal View. Then go to the View menu → Footnotes and select ‘Footnote Separator’ from the Footnotes pulldown menu. Then, accept the default line————— or type in the kind of line you want.
9. Click in the document window to continue your work, or to the footnotes window to work in there.

Editing Footnote text

Edit text in the footnote window as you would any other text.

Editing a footnote reference mark

You can edit a footnote reference mark to change it to another character.

1. Select the reference mark in the document window.
2. Choose **Footnote** from the **Insert** menu and type a new custom mark.
3. Click **OK**.
4. The reference mark in the footnote window will automatically change to your selection in the document window.

If you add or delete an automatically numbered footnote or its reference number, Word adjusts all the automatic reference numbers that follow.

Deleting a footnote

1. Select the reference mark in the document text.
2. Choose **Cut** from the **Edit Menu** to delete the footnote. Word deletes the footnote reference mark and text from the footnote window. You can also backspace/delete the selected reference mark to remove the footnote.

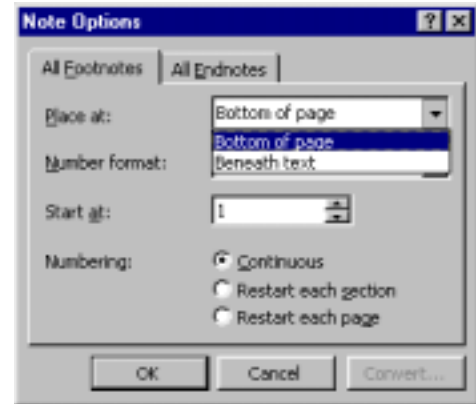
3. Auto numbered footnote reference marks that follow the deleted footnote are automatically adjusted.
4. You cannot delete a footnote by deleting the text in the footnote window.

Controlling where footnotes/endnotes print

1. Choose **Footnotes** from the Insert menu.
2. Click the **Options** button to display the footnote position. Click the arrow under “Place At” to see a list of choices. Highlight your selection.

If you choose **Bottom Of Page**, word prints footnotes below the bottom margin and above the footer.

If you choose **Beneath Text** word places footnotes after the last line of text instead of at the bottom of the page. This is probably the best option to allow the most space for multiple lines of footnotes to fit on each page.



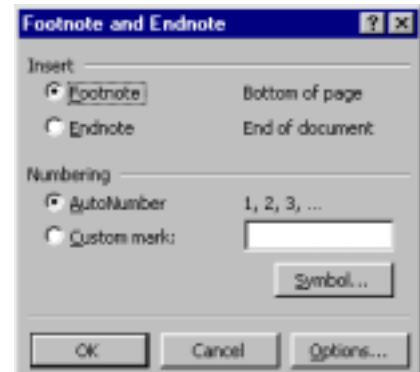
If you choose **End Of Section**, word prints endnotes at the end of that section.

If you choose **End Of Document**, word prints endnotes at the end of the whole document.

Converting all footnotes to endnotes

1. Choose **Footnotes** from the Insert menu.
2. Click the **Options** button. Then click **Convert...**
3. Choose the conversion that you wish to do.

You can modify endnotes in much the same way as footnotes.



Footnote problems and their possible solutions:

Problem: A user's paper has big gaps towards the bottom of her pages. i.e., the page has room for more text but the last paragraph of the page jumps to the next page, therefore leaving too much space on the present page. Happens on both Mac and IBM Word.

Solution: Place cursor inside the paragraph that keeps jumping. Go to the **FORMAT** menu in Word and select **Paragraph...** Next, click on the **Text flow** tab and see whether the "Window/Orphan control" and the "Keep lines together" options are checked or not. Usually, if one or the other is checked (i.e.,) UNchecking that option and then clicking "Ok" fixes the problem.

Another Problem: A user wants all the footnotes for a specific page to appear on THAT page (makes sense, right?). However, Word keeps bumping the 2nd or 3rd footnote for that page to the next page (and also draws a complete line across the bottom of that page as its footnote separator). Ex:

¹ This is the footnote text for the first footnote on this page (page 2).
² This is the footnote text for the second footnote on this page (page 2).

And then if you go to the end of the next page, you see:

³ This is the footnote text for the third footnote on this page (page 2) but whenever I insert it, it jumps to the next page

If you try to go to the end of footnote 2 and hit the forward delete, but that doesn't seem to work. If you go to the end of footnote 2 and hit Return, it DOES work (oddly enough). However, page two then looks like:

¹ This is the footnote text for the first footnote on this page - page 2.

² This is the footnote text for the second footnote on this page - page 2.

¶
³ This is the footnote text for the third footnote on this page (page 2) but whenever I insert it, it jumps to the next page.

i.e., there is a carriage return between the 2nd and 3rd footnotes.

You could try: positioning the mouse pointer to the very left of the blank line and highlighting that line and changing the font size of that line to something small (i.e., 2 point or 3 point or 5 point). This would make the line so small that it appears to not be there.

OR

You can try to cut and then paste the footnote (e.g. footnote 3) into the correct place.



For more workarounds for footnotes appearing on the wrong page, see the “Footnote Fixes” document in the References section on WebCT. That is a copy of an official Microsoft Knowledge Base article.

Master Document Overview

Word’s master document feature is designed for long documents such as a thesis or book. By creating a collection of smaller subdocuments (for example, one per chapter) which are then organized into a master document you can:



- work more efficiently (smaller files are easier to manage)
- quickly reorganize the overall structure of the full document
- automatically generate a table of contents and index
- work more safely (loss of a single file would not mean loss of the full document)

Begin by thinking of the master document is as an outline of the full document, with a heading for each subdocument. Each subdocument is a document which will exist as a separate file outside of the Master Document.

<ul style="list-style-type: none"> □ Title □ <i>Introduction</i> □ <i>Chapter 1</i> <ul style="list-style-type: none"> □ Part I □ Part II □ <i>Chapter 2</i> □ <i>Bibliography</i> 	<p>Now, imagine expanding any or all of the headings in the outline to reveal the contents of the corresponding subdocuments. By collapsing (click on the  sign) and expanding (click on the  sign) the headings in the master document, you can view and manipulate its outline, the full document, or any part in between. Each subdocument continues to exist as a separate file, which you can edit as usual, with changes automatically incorporated into the master document. Conversely, any editing you do in the master document automatically updates the corresponding subdocuments.</p>
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Outlining a Document

To use a master document, it is first necessary to understand Word’s outline feature. Any document can be viewed as an outline (from the **View** menu, choose **Outline**). You will see three symbols in outline view:

-  **Denotes a heading without any subheadings**
-  **Denotes a heading with subheadings**
 - **Denotes body text**

The Heading styles are numbered from the top down, so Heading1 is the highest level, Heading2 is the next level down, and so on.

The outline toolbar allows you to collapse, expand, promote and demote headings, etc.:



Positioning the mouse over any button on the toolbar will bring up a box describing its function. The button on the far left, for example, promotes a heading (that is, makes a Heading2 into a Heading1, etc.). See online help for details.

Master Document Formatting Considerations

If you will be working on a machine which does not have Word 98 Mac or Word 97 PC, but you want to use a master document to print your thesis in the lab, you should keep your chapters as separate files and wait until you are nearing completion of your thesis to create the master document and do your final formatting.

Section formatting

Each subdocument is a section of the master document. Section properties include headers, footers, margins, page size, page orientation, and page numbers. You can set unique section formatting for each subdocument, and you can also insert additional section breaks within a subdocument to control formatting within that subdocument.

If you want a section property (such as a header) to be consistent in all subdocuments, set the section property in the master document, not in a subdocument. (If you import a document and make it part of a master document, the imported document retains its original section formatting.) For more information about section formatting, go to the Online Help, do a search for the phrase “page setup” and then double click on it. Then go to the topic: Page Setup: Margins, Page Numbers, and Other Items.

Document templates

When you work with a subdocument from within a master document, and the master document and the subdocument are based on different templates, the formatting and settings in the template attached to the master document override some of the formatting in the template attached to the subdocument. Styles, AutoText entries, macros, and other items in the template attached to the master document replace those in the template attached to the subdocument. Margins, column layout, page numbers, headers and footers, and other section formatting remain intact for each subdocument. For more information about templates, see Document Templates in online help.

Table of Contents

By formatting your headings (chapter titles, e.g.) with Word’s built-in heading styles, you can have Word create a table of contents, with your headings as entries. (see “Creating a Table of Contents” below)


Creating a Master Document from existing separate files

Open a new document and choose **Master Document** from the **View** menu.


To add an existing document to the master document, put the insertion point at the correct location in the master document and use the **insert subdocument** button on the toolbar.


Creating a Master Document from scratch

Open a new document and choose **Master Document** from the **View** menu. Type an outline for your document, consisting of the title, chapter headings, subheadings, and so on. Use tabs or the **promote/demote headings** buttons, on the far left of the toolbar, to arrange your headings hierarchically. Highlight the heading for a subdocument and click the **create subdocument** button on the toolbar. A box with a subdocument icon will appear around the heading. When you have done this for each subdocument, choose **Save As** from the **File** menu and give a name to the master document.

Word will assign its own names to the subdocuments (using the headings you typed). If you want to change the name or location, be sure to open the subdocument from within the master document, by double-clicking on the subdocument icon . Then choose **Save As** from the **File** menu.

Working with subdocuments

While in the master document, you can work directly on the structure of the full document, or on any section of it, including subdocuments. You can also work separately on a subdocument by opening it from within the master document (double-click on its icon ).

 In this case the master document stays open, a padlock appears under its icon in the master document, and you cannot edit it within the master doc. (You may either edit in the subdocument, or close the subdocument and edit within the master doc.) With the master document closed, you may also open a subdocument directly from the **File** menu. In both cases, when you save the subdocument, the master document will update itself to reflect your changes.

Note that subdocuments, when viewed separately, will not necessarily reflect correct page numbers; use Print Preview in the master document to check page numbers.

Creating a Table of Contents

To create a table of contents, open the master document in *master document* view, position the insertion point where you want the TOC to appear, and select **Index and Tables** from the **Insert** menu and then click on the Table of Contents tab. Keep in mind that if you edit the document, you may need to update the TOC to reflect changes in pagination: open the master document in *normal* view, position the insertion point inside the TOC, and press F9. Choose “Update entire table” only if you’ve changed any headings or entries.

Note: If you see a code such as {TOC} instead of the table of contents, go to the **Tools** menu, **Options**, select the **View** tab, and then clear the **Field Codes** check box.

Printing

To print the full document, open the master document in *normal* view, then print. To print only the outline, keep it in *master document* view and collapse as many headings as you like. To print a subdocument, just open it and print as usual.

For more information about working with master documents, use online help.