

Long Documents with Microsoft Word

Typography basics

Type **ONE SPACE** after a full stop. Double spaces are for typewriters, with their extra-wide letters. With proportional computer fonts, double spaces look tacky. Every professional book, journal, and magazine on your shelf uses one space, and so should you.

The quote marks on your keyboard are not **REAL QUOTE MARKS**—they're called straight quotes, or typewriter quotes. Typographers' or "curly" quotes are what the real world uses; an apostrophe is a *single closing* curly quote. Your word processor probably converts straight quotes to real quotes on the fly (check the Autocorrect > Autoformat settings) but sometimes it messes up, so learn to type them by hand.

Don't **UNDERLINE** anything (particularly not in these web-link days, and even though some old style books say you should). Use italics instead: ALL CAPS and underlining are both typewriter relics.

The key beside the zero on your keyboard is a hyphen, not a dash. To make a **DASH** on a typewriter, you would type two hyphens (and Word will even convert them if you do), but see Insert Symbol to learn the shortcut for an en dash and an em dash. **EN** dashes are used in a range (from x to y, replacing the 'to'), while longer **EM** dashes show a break in a sentence—like this (or you can use an en dash with a space either side – like this.)

There are a multitude of **SPECIAL CHARACTERS** available in all fonts (*Insert > Symbol*): curly quotes of course, a degrees symbol (°), an ellipsis (...), a bullet (•), some math symbols (×, ±, ÷), Spanish punctuation (¡, ¿), and accented characters (é, à, î, ñ, ö, š, and most importantly the macron: ā). Don't try and fake these yourself; for example, by making a degrees sign out of a small superscripted 'o'.

Tabs and indents

If you find yourself typing tab-tab-tab-tab, something's wrong. You're probably using the default **TAB STOPS**, which are only half an inch apart. Set your own: click the tab stop button, click in the ruler. Choose left tabs except in special cases (e.g., when setting columns of numbers, use a decimal tab stop). The goal is a single tab between each item in a table—this will make editors much happier, as they won't have to delete hundreds of superfluous tabs. And *never* use the space bar to make things line up; this only works on typewriters.

INDENTS are also controlled from the ruler. You don't need to indent the first line of your *very first* paragraph; we can see where it starts. All other paragraphs can have a small indent: a few letters, about a quarter inch. Don't use the tab key; drag the first-line indent marker in the ruler (like tabs, these ruler settings only affect the paragraph you're in, or those you've selected). Leave the left and right indent markers, unless you want to bring the whole paragraph in from the left and right margins as a block quote. You should either indent paragraphs, or put space between them (see below), but not both. Not all citation systems agree with this advice. Check all of these details in your citation style guide.

HANGING INDENTS are used mostly for bibliographies. Select all the paragraphs you want to format. Set the first-line indent at the margin, and bring the left indent in a little. You can make lists using hanging indents and a tab stop, or with Word's "bullets and numbering" tool.

Typewriter font. Two spaces

proportional font. Two spaces
proportional font. One space

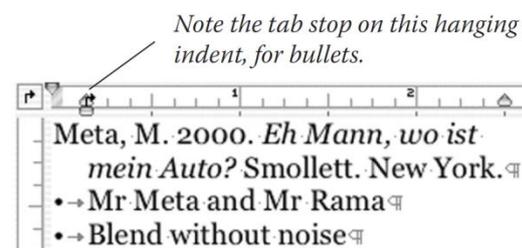
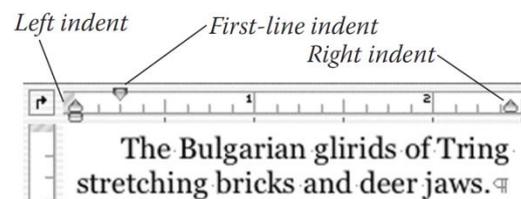
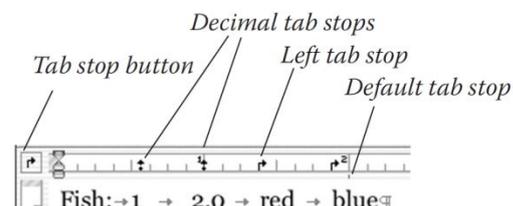
"Typewriter quotes."

These are "crass," and these are "nice".

‘	“	’	”
<i>Single</i>	<i>Double</i>	<i>Single</i>	<i>Double</i>
<i>open quotes</i>		<i>closing quotes</i>	

<i>Hyphen</i>	Thin-edged
<i>En dash</i>	Tues–Fri, 8:00–5:00
<i>Em dash</i>	This—or that

Get used to using *Insert > Symbol* to find special characters and learn the keyboard shortcuts (which vary between Mac and PC). Try keeping a list of useful shortcuts on a Post-It on your monitor until you've learned them.



Paragraph formatting

LINE SPACING is one of the best ways to improve readability, often better than making the text bigger. Check *Format > Paragraph* or press the  button on the *Home* ribbon. The default is “single spaced”: try setting an *exact* line spacing about 120% of your font size (e.g., 10 pt Georgia on 12 pt line spacing, alias “Georgia 10/12”). Increase line spacing by a point or two if the readability is compromised, for example with sans-serif fonts like Arial or Helvetica.

Get control of your **PARAGRAPH SPACING**. Don't press *Enter* twice between paragraphs; that inserts a whole typewriter-like line of space, which is usually too much. Try manually setting a lesser amount, like 6 pts, or 3 pts between the references in your bibliography. Note that any space set after one paragraph is added to any space before the next one.

Rather than format each paragraph manually, learn to use **STYLES**. These are preset formats, with names like *Normal* or *Heading 1*. Some apply to a whole paragraph, others (character styles) to just a few letters. You can modify the premade ones, create your own, import them from other documents using the *Organiser* within the *Manage Styles* function, or even open the *Normal* template and alter them there to affect all subsequent documents.

Once you've applied a style to every paragraph, you can make global changes, like “all sub-headings 1 pt bigger” in a flash. Styles also allow you to create automatic tables of contents, or use Word's outlining tool.

Document management

Use **PAGE BREAKS** or **SECTION BREAKS** (Next Page) rather than multiple Enters to begin a new page: choose  *Breaks* ▾ from the *Page Layout* ribbon or click *Insert > Break*. Section breaks are for when you need to change headers, margins, or page numbering in the course of your document.

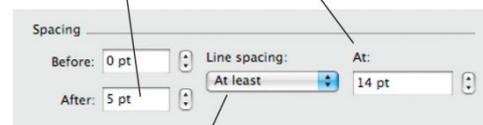
Fix Word's manic **AUTOCORRECTING**. You can control these auto corrections by choosing *File > Options > Proofing > AutoCorrect Options*. Turn off those functions that are not required.

Avoid the mouse; learn **SHORTCUTS** from the menu and online Help—a minimum would be Open, New, Save, Copy, Paste, Cut, and Print (keep good shortcuts on a Post-It near the computer until you've memorized them). Double-click selects a word, triple-click a paragraph. Clicking to the left of a line selects it, and double-clicking there selects the whole paragraph. Bonus: try shift-clicking and ctrl-dragging...

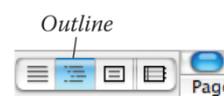
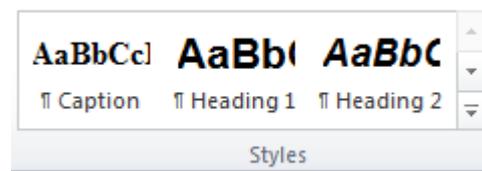
The **WORD COUNT** function can tally the whole document or just a selection. The current word count is found in the status bar at the bottom of the window.

Finally, don't rely on Word's **SPELLING CHECKER**—it won't tell you if you used the wrong word—and beware its Grammar checker, which is sometimes unhelpful or actually misleading. You can turn either off by clicking *File > Options > Proofing*.

Here's a sample setting for spaced paragraphs with about 11 pt text.



The *At least* setting means that the line spacing will expand if you insert something big, like a picture.

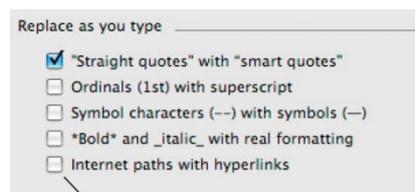


Found within the View ribbon

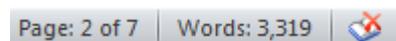
or



Outline



This is the *Autoformat As You Type* setting that makes your web addresses blue and underlined!



Further reading

Williams, Robin. The Mac [PC] is Not a Typewriter. (Peachpit Press, 1995). *Short twin books, covering much of this workshop but more elegantly. Another of hers is The Non-Designer's Design Book (Peachpit Press again)—she also has non-designer books on Fonts and the Web. All are highly recommended.*

Outlining

Outline view is an enormously powerful way of planning and structuring your document, but most people don't know about it.

Using outline view

Choose Outline view from the bottom left corner of the window, or choose the *View* ribbon and click on the *Outline* button. When you type in Outline view, you automatically make headings with the Heading 1 paragraph style applied.

Promoting, demoting, and body text

Demoting a heading makes it into Heading 2, Heading 3, etc. Demoting to Body Text converts it to Normal paragraph style. You can also drag a heading (by the little + or - handle) left and right to promote or demote it.

Hiding, showing, and rearranging

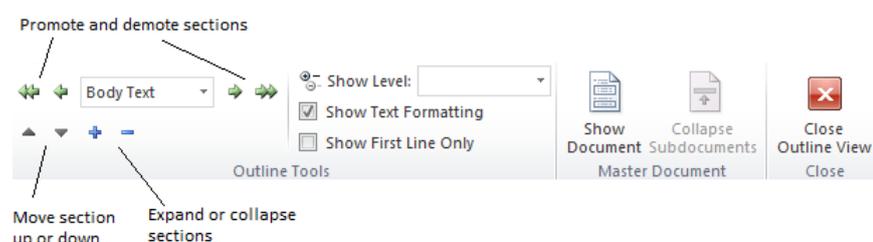
Rearrange your text by dragging headings up and down, using the little handles in front of them (or use the up and down buttons). All your subheadings, figures, and body text go along for the ride.

When you've typed quite a bit of body text, you may need to hide some of it to see the structure of your document. Use the + or - buttons (or double-click on the + or - handles) to collapse the section you're currently in, or collapse the whole document back to higher level headings using the numbered buttons or the *Show Level* menu. *Show All* to cancel.

It's also useful to show the first lines of each paragraph. If you write topic sentences for your paragraphs, this means you can see the whole structure and logical flow of your writing on just a page or two.

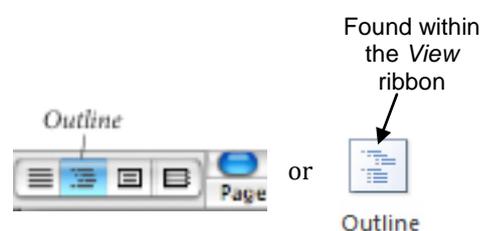
Big advantages

- Outline is a **thinking** tool: It gets you writing right away, and makes it easy to jot down notes and reorder your argument. Take advantage of as many levels of subheadings as you need to organise your writing; you can delete some later.
- Outline uses Word's built-in Heading styles. These are essential for creating automatic tables of contents, chapter and section numbering, and keeping your formatting consistent. See Workshop II for more on styles.
- Outline makes it easy to navigate through huge documents.



Shortcuts

<i>Ctrl-Shift-Left Arrow</i>	<i>Promote</i>
<i>Ctrl-Shift-Right Arrow</i>	<i>Demote</i>
<i>Ctrl-Shift-N</i>	<i>Make body text</i>
<i>Ctrl-Shift-Up Arrow</i>	<i>Move up</i>
<i>Ctrl-Shift-Down Arrow</i>	<i>Move down</i>
<i>Ctrl-Shift-Plus</i>	<i>Expand</i>
<i>Ctrl-Shift-Minus</i>	<i>Collapse</i>
<i>Ctrl-Shift-A</i>	<i>Expand/collapse all</i>
<i>Ctrl-Shift-L</i>	<i>Show first line/show all</i>
<i>Ctrl-Shift-2 etc.</i>	<i>Show up to Heading 2 (and so on for other levels)</i>



Styles

Styles are set of predefined formats you can apply to *paragraphs* (or just to a few *characters*). If you change a style definition, all the text using that style changes. Styles are indispensable for long documents, because they free you from having to format everything manually.

Choosing styles

Click or select somewhere in the paragraph (for a paragraph style) or select some text (for a character style). Choose styles from the *Styles* section of the *Home* ribbon, and use Ctrl-Y (the Redo command) to repeatedly apply them. You can also use a keyboard shortcut that you've previously created for the style.

At the very least, all your text paragraphs should be Normal and your headings Heading 1, 2, or 3.

Editing styles

To edit a style, go to *Home > Styles* and click on the  button. You may want to view All Styles rather than just the ones you're currently using. Right click on the style you want to change and select "Modify": changes you make here will affect all the text using this style.

Turn off Automatically Update, or Word will change the style definition every time you manually format some text (not that you should be doing that much).

Creating a new style

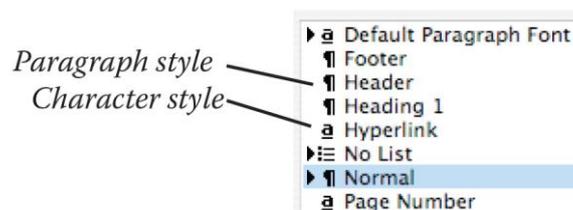
To create a new style, go to *Home > Styles* and click on the  button then click on the *New Styles* button (). Name and edit the style; don't forget to manually apply it to the paragraph in question when you're done.

Choose *Based On* carefully, to create a hierarchy of styles, and pick a sensible *Following* style (for example, when you're typing a heading and hit Enter, the style should switch to Normal).

Some styles come with Word and should just be edited (Caption, Footnote, Reference); any others you'll need to create yourself.

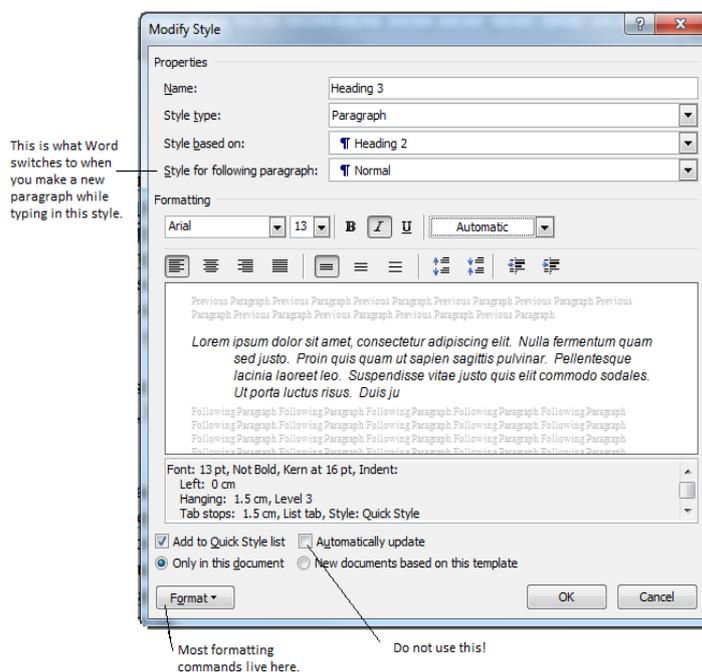
Style sheets

This is a list of all the styles in use. To print your styles sheet, click on File > Print, then click on the *Print All Pages* drop down menu. Select *Styles* to print the style sheet and *Key Assignments* for their keyboard shortcuts.



Tips

- Every paragraph should have a style applied to it (unless you have a very good reason).
- There should be no "empty paragraphs": use *Paragraph* then click  on the *Home* ribbon to make space between things.
- There should be no multiple spaces: use tabs.
- There should be no manual page breaks: use Keep With Next to make headings stay with their text.
- Avoid doing any manual formatting if you can; do it with styles instead.
- Create keyboard shortcuts for the main styles.
- Set up styles for following paragraphs to save on typing.



The Fix-your-document checklist

- Make the whole thing Normal to strip off all the formatting.
- Find and Replace all empty paragraphs (^p^p) with single paras (^p). Do the same to take up double spaces, fix dashes, etc.
- Make sure the definition of *Normal* includes first-line indents and the minimum line spacing you need.
- Apply Heading styles to all the headings using your keyboard shortcuts. Change their definition until you get the spacing you want; you may want an automatic new page before each Heading 1, for example.
- Optional: create an unindented Normal style for paragraphs following headings.
- Edit the predefined styles for footnotes, captions, headers, and footers.
- Create styles for block quotes, code samples, references (with a hanging indent), and bulleted lists.
- Insert figures and test/edit the Caption style.
- Enter your citations, create a bibliography, and edit the Reference style.
- Insert a Table of Contents and edit the ToC styles.

Suggested Style Sheet Content

- Heading 1
- Heading 2
- Heading 3
- Normal
- Unindented Normal
- Blockquote
- Footnote
- Caption
- Header/footer
- References
- Bulleted list
- Numbered list
- TOC 1, 2, 3, etc
- Table text

Managing styles

When pasting in new text, right-click to choose the pasting type (*Use destination theme, Keep source Formatting, Text only* etc.).

Styles belong to the document, not to Word as a whole. You can copy styles into a document by clicking the  button in the *Styles* portion of the *Home* ribbon > the  button and *Import/Export*. Then click on *Close File* on the *In Normal* portion of the dialogue box > *Open File* then select the document whose styles you want to copy across.

If you want to change the styles of all future documents, you need to edit the Normal Template (a Word template called normal.dot which lives somewhere on your computer). Any time you see an “Add to template” option in a dialogue box, you can edit the Normal template. But it’s a good idea to create your own set of templates, each with a different style sheet, and save them in the Templates folder for later use.

Sections and Masters

Page Numbering and Sections

The best way is with *Insert > Page Number > Format Page Numbers*. Margins, headers/footers, and other page level formatting belongs to the **SECTION**, not the whole document. Most documents have only one section, so you would never notice this. A **SECTION BREAK** (*Page Layout > Break > Section Break*) allows you to re-insert page numbering for that section and choose a new scheme. You also have the option of leaving the first page of each section (e.g., each chapter) unnumbered. A *Next Page* section break is usual for a new chapter, while a *Continuous* section break is good for briefly changing margins or columns.

HEADERS and **FOOTERS** have their own margins, smaller than the main text. They aren't just for page numbers; try "Printed on [inserted date]" with your drafts. Watch out for a "Same as Previous" message near the header/footer, or you'll change other sections too; the *Link to Previous* button toggles this. If you want to change just one section, make sure *Same as Previous* setting is off for both header and footer, both for that section and the section following.

If you change margins, choose whether the whole document changes or just that section (or all following sections); you can even switch to **LANDSCAPE** for a page, perhaps to accommodate a large table. But if you do this, the page number will be in the wrong place (the upper right corner, rotated) when you collate your printout.

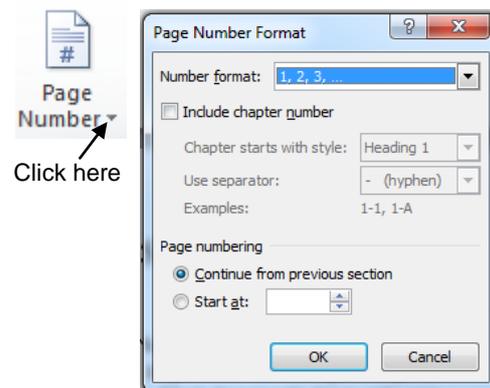
Master Documents

Do you need to split your Word document up? Possibly, if it contains so many huge graphics that its file size goes over 50 MB, or it becomes very slow to open and scroll through. Possibly also you'll be sharing different chapters with different people simultaneously. But if you don't, keep it as one document (and make lots of backups of different ages). Master documents in earlier versions of Word were very buggy, and they still might have problems.

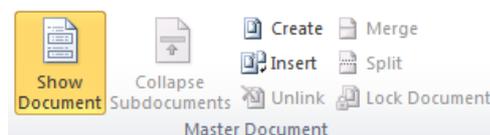
I would create a skeleton document to act as your master document. You can create placeholders for the title page, table of contents, tables of figures and captions, abstract, and references. Then you'll insert the actual chapters into this master document as subdocuments, which you can expand or collapse as convenient.

Go to the *Master Documents* toolbar from *Outline* view and click on *Show Document*. You can *Insert* one of your chapters as a subdocument; Collapsing the view shows you just the link to your chapter. It's a good idea to organise all your files neatly, then create the master document, then create the links, and then not move everything around. Don't use any of the other buttons: Master documents are very prone to corruption, and you could lose or scramble your text if you do anything other than what I've described.

The styles in master documents take priority over the styles in your individual chapters, but it's better to get your styles all sorted out first before you create the master. And edit your chapters directly, not from within the master. To avoid corruption problems, assemble the master late in the process, generating the table of contents last of all.



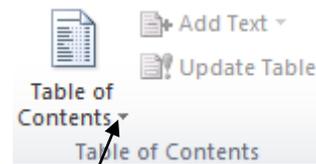
TIP: You can rotate a one-page section to landscape view to fit in an extra-wide table, but the page number on the bottom right of the landscape section will end up in the top right, on its side, when you print and bind all the pages. When in the correct position, click on Page Number > Page Margins > Large Left. Drag the text box to the correct position, format it from the Home ribbon and click Text Direction to rotate it 90° clockwise.



Captions and Cross-References

Tables of Contents

Click *References > Table of Contents*. Word uses your basic Heading styles as ToC entries, but you can choose other styles to include, and choose how many levels of heading are used. The default is usually to Show and Right Align the page number, using a dotted leader tab; there are several templates available. The different levels in the ToC all have their own paragraph styles, and it's best to format these styles rather than the text directly. You have to click on the page number itself to get access to the ToC style, as Word annoyingly makes most of the ToC text into a hyperlink.



Click here

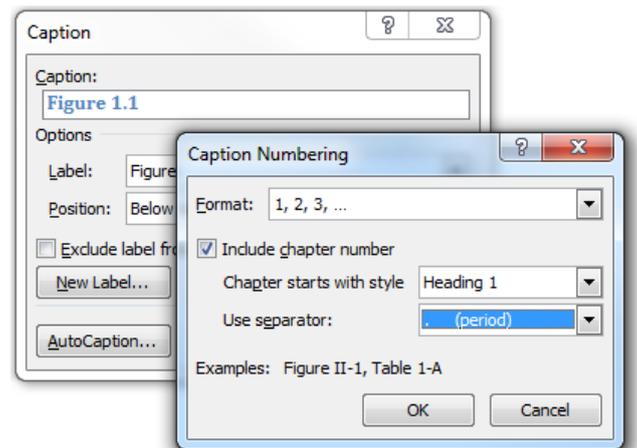
Figures, Tables, and Captions

When you insert a figure (or a table or equation), double-clicking brings up the tab for wrapping text around it. Usually you don't need to do this in a thesis—the text can jump straight over it.

You can select the figure, right-click > *Insert Caption*. The Label (e.g. “Figure”) and the Number are inserted for you by Word, and you can add optional text after them. (The caption will be an ordinary paragraph if your graphic is, or a text box if the figure has text wrap. Decide before you insert the caption.) Numbers change as you move the caption around, and if you choose AutoCaption figures will be numbered when you insert them.

You can get really fancy and make part of the caption number refer to the chapter number, but you have to use Heading 1 for the chapter name, and apply a multilevel list format (in short, it's a headache).

The important part about captions is that you can insert a Table of Figures or Table of Tables, and Word will use your caption text and automatically add page numbers. Keep the caption text concise: if you need explanatory text after it, use a new paragraph and style.



Cross-references

Inserting a cross-reference (*References > Cross-reference*) adds a field that can contain any number of things: the name or page number of the figure/equation/table that you created a caption for (this is another reason why we use captions), or the caption text, or just the words “above” or “below”, so these remain accurate if you move the figure, or a combination of those things. So you can create a cross reference that says “(see Table 1: All known *Aepyornis* egg dimensions, below)” or “(see Figure 5, p. 244)”.

If you do move figures around, you may need to right-click on the field to update it, or use F9 (maybe Select All so every field gets updated).

