Long Documents

Long Documents and/or Reports can be set up easily in Microsoft Word. The key to success is to take the time to set up a long document or report correctly, up front, to allow for easy management.

Working with Styles

A Style is a set of formatting characteristics, such as font name, size, color, paragraph alignment and spacing. Some styles are automatically included in Word (Heading 1, Subtitle, Normal, etc.) Any style may be modified to a unique formatting style, or a new style may be created to a user’s specifications.

When used correctly, styles can save a lot of time by allowing users the ability to set the formatting for a certain type of text (heading, paragraph text, or a caption) in one place, then apply that formatting to all the text of that type in the document. Even more important, if the formatting for a style is changed (for example, to make the font size 11 points instead of 10), it can be done in one location and then all the text with that style will be automatically updated.

Styles enable users to use many other timesaving features in Word, such as automatically generate a tables of contents, tables of figures, and/or indexes.

Using Styles to Format Headings

Headings distinguish different levels of a document, Title, Heading 1, Heading 2, etc. Using styles in a document is similar to creating an outline of a document where there is text that is headings and subheadings. The various headings should use different formatting options to distinguish the different levels.

The Styles Group

Styles are located in the Styles group on the Home tab in Word.

Move the cursor next the text to apply a style. Navigate to the Styles group and mouse over any style listed in the Style Gallery to preview of that style over the selected text.
**Note:** Depending on the width of the Word window, not every style may display. To see every style that is available, click on the dropdown button on the right corner of the styles group.

To select a style for the text, click on the appropriate style. The style will be applied to the text.

**Styles based on Document Theme**
The style design and color can be changed by changing the Theme from the Design tab.

Click on the Themes button to see all of the built in theme options in Word. Select a new theme, but clicking on the theme icon.

**Note:** It may be useful to have some headings, text, etc. on the document to see how the new theme will affect the look of the document.
Each theme will allow for variations in the type of style that can be applied to the document, which are displayed on the Design tab, to the right of the Themes button. Users are able to navigate over any theme to see how it will affect a current document.

**Note:** Depending on the side of the Word window, not all styles may be displayed. To view all of the style options, click on the dropdown button on the lower right side of the theme styles.

Users may also choose a specific color group, or font for the theme style by clicking on the Colors or Fonts buttons to the right of the Theme Styles list.

**Edit an existing Style**
Any styles that are built into Word may be edited to a specific user-defined format; new text color, larger font size, new font, etc.

To edit a Style, navigate to the Home tab, right click on the Style to edit, and then choose Modify.

The Modify Style window will appear displaying the Name and all formatting for the specific style that was selected.

**Note:** It is not recommended to change the name of a default Heading Style within Word. If this is done, the default style, Heading 1, Heading 2, etc., will be overwritten. Depending on the options selected on the bottom of the Modify Style window, this could change the heading in all new documents as well.
Users are easily able to change the font type, size, color, alignment of the style in the middle of the window. Under the Formatting section, users will see how the new style will appear.

On the bottom of the Modify Style window, there are a couple of options that are of importance.

- **Add to the Styles gallery** – Adds the updated style to the Styles gallery on the Home tab
- **Automatically update** – If this is checked, users are able to make changes to any text in the document of this particular style and that change will be applied to all text of that style in the entire document.
- **Only in this document** – The changes are applied to the Style within this document only.
- **New documents based on this template** – The changes are applied to the style within this document, and all new documents that are created.
From the Format button on the bottom of the Modify Style window, users are able to make more adjustments to the style that is being edited. To see what options are available, click on the format button. Users are able to make adjustments to fonts (color, size, alignment), the paragraph (alignment, indentation, spacing before or after, etc.), tabs, etc. for a particular style.

**Note:** Any changes that are done here again will be applied to all text that is of that particular style.

Another way to make quick edits to a style is to type text within the document and make the desired changes to that text within the document, font color, font size, paragraph spacing etc. When the changes have been made, make a selection of the text in the document, and then right click on the style in the Styles gallery and choose Update “Style Name” to Match Selection.

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**Create a new Style**

Users are able to create completely new styles that can be used on all new documents that they create.

To create a new style, type text within the document and make the desired changes to that text within the document, font color, font size, paragraph spacing etc. Navigate to the Home tab, click on the dropdown button to the right of the Styles gallery and choose Create a Style.
On the Create New Style from Formatting window, Word will display the style of the selected text in the document. Type in a unique name for the new style and then Click OK to add the new Style to the Style Gallery.

If there are some adjustments that need to be made on the formatting of the new style, click on the Modify…button.

**Tip:** Just as any other style in Word, this style may be modified at any type by right clicking on the style in the Style Gallery, and choosing modify.

**Page Breaks**

To insert a page break, position the cursor in the location where the new page should begin and either

- Press Ctrl-Enter
- Navigate to the Layout tab, click on the Breaks dropdown and then choose Page under the Page Breaks section.

**Section Breaks**

Section breaks let you divide your document into sections so that you can vary the margins and headers/footers per section within the document. The formatting of a particular section will continue until it is changed in subsequent sections.

To create a Section Break, position the insertion point where you want to begin a new section, and choose the appropriate section break from the Breaks icon on the Page Layout tab of the ribbon.

**Tip:** Continuous section breaks leave content as is and just insert a “break”. A Next Page break will insert a section break and move the content beneath it to the next page of the document. In most cases, it will be best to use the “continuous” section break.

**Tip:** Section Breaks are not visible on the Print Layout View. However, if you switch to the Draft View, you can easily identify section breaks. The Draft View is a good place to be if you need to delete a Section Break.

**Tip:** By default, section information does not appear in the status bar of the Word 2007 window. To show section information in the status bar, right-click the mouse on the status bar and choose section.
Headers and Footers

The Header and Footer tools are located on the Insert tab, Header and Footer Group.

Select the drop-down arrow for Footer and choose a style. The footer will apply at the bottom of every page in the document by default.

Tip: The Header/Footer can be set up so the First Page can be different. Once a footer/header has been inserted into a document and it is in edit mode, a new tab will appear in the Ribbon for additional Header/Footer tools. Select Different First Page from the Options group. Note, this option is also located in the Page Layout dialog box in the Page Setup.

Headers and Footers can contain text and/or images. Type your own text and insert your own images or you can insert Quick Parts, pre-built text and design, from the Header & Footer Tools, Design tab. Note, you must be in edit mode for the Header/Footer in order to see this tool.

Vary the Header/Footer

Vary the header and footers within a document by adding a continuous section break at the end of the page on the page above the page that will need a different header or footer.

Go to the Layout tab then select Breaks in the Page Setup group, select Continuous in the Section Breaks options.

Next, navigate to the page that will have the new Header or Footer. Click in the Header and Footer area to activate the Header/Footer tab in the ribbon.

The Link to Previous should be highlighted. Click on the Link to Previous icon to unlink the current Header/Footer from the previous page. Last, type in your new Header/Footer text and close the Header and Footer.

Tip: The new Header/Footer will continue on until a new section is added and unlinked.
Footnotes and Endnotes

Footnotes and Endnotes are used to support facts, your position or cite references within the document. Footnotes appear at the end of each page or directly below the footnote. Endnotes appear on a separate page at the end of the document. Footnotes and Endnotes store the same information, but they are just displayed in different areas of the document. Most people like to see citations on the page of the where the actual footnote is cited instead of at the end of the document. However, when creating a long document or report, ask the end user their preference as to which tool to use, footnotes or endnotes.

Footnote or Endnote

Position the cursor where you want to reference a Footnote or Endnote and choose either the Insert Footnote or Insert Endnote icon from the References tab of the Ribbon.

FootNote Example:

Tip: If the footnote number is not showing in the text, then select the Show Notes icon from the References tab of the ribbon.

Edit the Footnote Properties by selecting the Footnotes dialog box launcher.

Select Footnotes or Endnotes from the Location section of the dialog box and choose the positioning, the Formatting and where in the document the Footnote/Footnote should apply. Select the Insert button when finished.

Tip: Word will recognize when the document has changed and update or move the footnotes and/or endnotes.

If you place the reference mark in the wrong location, you can cut and paste or drag to move a reference mark to a new location.

If you need to refer to the same footnote or endnote in a document, you can copy and past the footnote or endnote.
Create a Table of Contents
In order for Word to automatically generate a table of contents, the document must be set up using styles. Scan the document to be certain all titles and subtitles (or subject sections) are easily identified with a style.

Insert a page in the document where you want the Table of Contents to display.

Next, from the References tab, select the Table of Contents icon. From the menu, select the style of the Table of Contents to be used. Word will scan the document and find all headings that are specified as the “default.”

To specify which styles are used in the Table of Contents, select the drop down arrow for the Table of Contents icon and select Insert Table of Contents from the bottom of the menu. In the dialog box, select the appropriate headings.

Select the Options button to pick and choose which heading should be used in the table of contents.

Select the OK button when finished.

Update an existing Table of Contents
- Place the cursor anywhere in the Table of Contents
- Press the F9 key
- Select the option to update the entire Table of Contents

Tip: The Table of Contents can also be updated by selecting the Update Table icon.

Tip: Remove the Table of Contents by selecting the Remove bottom from the Table of Contents drop down menu.
Create a Table of Figures

In order to create a Table of Figures, the document must contain “captions”. Captions can be applied to graphics, equations, and tables within the document.

Labeling Images with Captions

A **table of figures** lists all of the graphics, equations, and tables in a document. For a figure to be recognized, however, it must have a caption.

To add a caption to a figure, equation, or table
Select the item and click the **Insert Caption** button on the References tab.

Select the Label type from the Label drop down menu.

**Tip:** If you want to create a custom label tag, then select the New Label button and type in the label name to be used.

Numbering will be automatic. However, you can click on the Numbering button to choose different numbering formats.

**Tip:** In order to restart caption numbering, you will need to add a section and modify the numbering for that particular section.

After all the captions have been added, **generate a Table of Figures** by selecting the Insert Table of Figures from the Captions group on the References tab of the Ribbon.

**Tip:** Navigate to the page in your document where you want the table of figures to be displayed.

From General Group of the dialog box, select the Caption Label drop down and choose the label type to be used in the Table of Figures.
Tip: If you want your figures to be integrated with the regular Table of Contents, then set the properties in the Options box for the Table of Contents to include “Caption.”

Create an Index

An index lists topics or key word covered in a book and/or long documents and provides the page numbers as to where you can find the topics within the document.

Creating an index takes time and planning. There are two steps in creating an Index.

1. Mark or identify each entry you want indexed in your document
2. Collect these entries into an index

Mark an Index Entry

Start the Indexing process by marking entries for the Index. Position the cursor next to the keyword and select the Mark Entry icon located on the Reference tab of the Ribbon.

Tip: The insert index shortcut keys is Alt+Shift+X.

Select the word or phrase to mark as an index main entry and choose the Mark button. Repeat this process until the marking in the index is complete.

Subentries can be used in an index. Start by creating a Main Entry by typing the name of the main entry in the Main Entry field.

Next, select the text that will be used as the Subentry and click with the mouse in the Subentry field and type the name of the Subentry to be used.

Each Subentry must be manually added. Repeat the process by entering the Main Entry Name, selecting the text to be used as the Subentry, and then typing a Subentry name for the item.
Example: In the example on the right, General Information is the Main Entry and About the Lab, Pay, Student Employee, and Timesheets are Subentries.

**Tip:** The paragraph marking is turned on once you add an index entry. Index entries are marked with XE and curly brackets.

To hide paragraph markings, just click the paragraph icon on the Home ribbon. (When paragraph markings are hidden, your indexed text will look just like any other text.)

When finished marking the index, close the Index dialog box.

**Assemble an Index**
Add the index to the document by positioning the cursor in the document where the index is to appear. Next, select the Insert, Reference, Index and Tables menu and choose the OK button.

- New entries can be added to the index at any time.
- Update or refresh the index by positioning the cursor somewhere in the actual index and pressing the F9 key.
- If you decide to change the format, simply select the current index and re-open the Index dialog box.

Marking Multiple Entries That Span Multiple Pages
To mark items which span several pages:
- Click and drag to highlight the section of text you want to mark.
- Click the **Insert** menu, and then click **Bookmark**.
- Type in a name for the bookmark and click **Add**.
- Click your cursor at the end of the text you just bookmarked.
- Press **Alt+Shift+x** to mark an index entry, and enter the name of the main entry and sub-entry (if necessary).
- Click the “**Page range bookmark**” radio button, and select the bookmark you just created from the drop-down list to the right.
- Click **Mark** to mark the entry, and then **Close**.