

Formatting using MS Word

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Table of Contents

Author's Note	4
Overview of Microsoft Word Settings	4
Setting up a Default Document.....	6
Margins.....	6
Page Breaks and Section Breaks	6
Page Breaks	6
Section Breaks	7
Paragraph Settings.....	8
Widowed and Orphaned Line Setting	9
Special Circumstances for Line Spacing	9
Single-space.....	9
Hanging indent.....	9
Adding Page Numbers.....	10
Preliminary Section	10
Body of Thesis, Capstone or Dissertation.....	11
Unlink Page Numbering	12
Landscape Pages.	13
Adding the new page location	13
Covering the number in the wrong location.....	14
Table of Contents	16
Automatic Table of Contents.....	16
Using and Modifying Styles.....	16
Inserting the Table of Contents	17
Manual Table	18
List of Tables and List of Figures	18
Centered Headings	18

Heading format	19
Block Indent.....	19
Embed Fonts	20
Tables	21
Setting up a Table.....	21
Inserting an Equation	22
References.....	22
Appearance of your references.....	23
Checking references and citations.	23
Other Helpful Advice	24

Author's Note

This handbook is the result of ten years helping students figure out how to make MS Word do what you need it to do. As a convert from Word Perfect, this was a challenge. I spend hours each semester trying to help students achieve the final result necessary during one of the most nerve-wracking periods of their lives, so finding a way to make it easier for you is as important to me as it is to you.

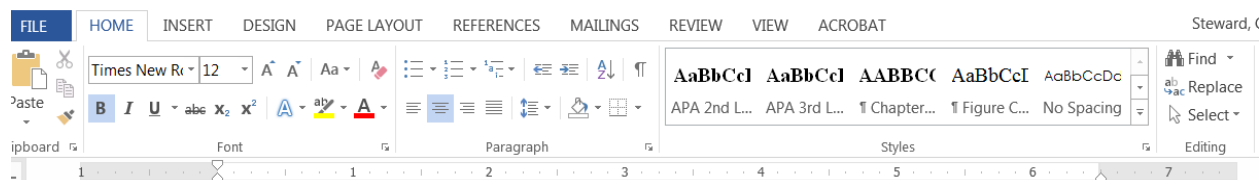
This is a How-To Tutorial, not a rule book. The contents of this handbook should in no way replace using the Graduate School Formatting Manuals for the Master's Thesis, Doctoral Capstone or Doctoral Dissertation. http://www.unco.edu/grad/new_current/resources/index.html

Overview of Microsoft Word Settings

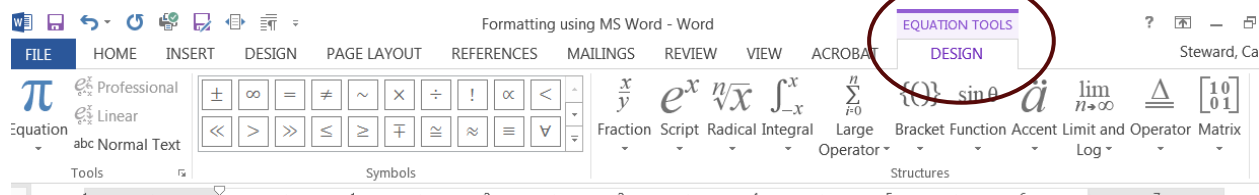
The best results are achieved when you setup the basic document settings before you start writing. That isn't always possible, and if you don't work on the format until right before turning your manuscript in for approval, be VERY sure to save the successful edits with a new name so that you always have the original to revert to if something goes really wrong.

Play with the settings in a test document and get familiar with what MS Word settings do before trying to implement changes in your manuscript. If you're using a document that has text already, in most cases, you can highlight sections and change settings throughout. Such as the Margins, highlight the entire document and set the margins rather than doing it chapter by chapter. If you're playing around with line spacing, work in smaller chunks, or if you choose to revise the full document at one time, plan to go back and reset the single-spaced sections. (Research questions, hypotheses and blocked quotations.)

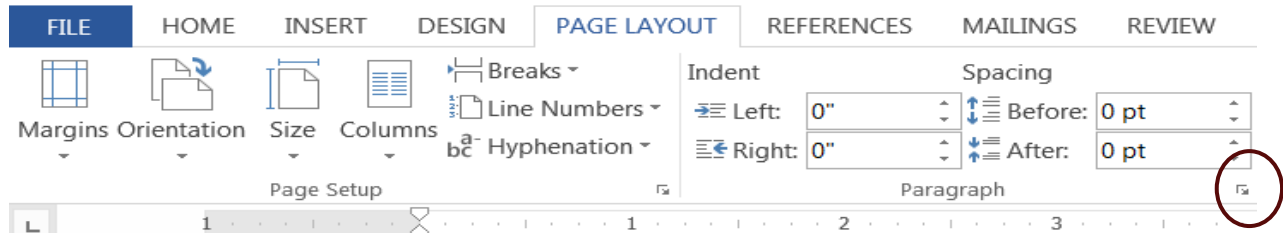
Get familiar with the "ribbon" of tool options.



On some tabs, such as the Insert Tab, if you ask it to insert an equation, it will open a new tab which gives additional options. These will show up in color, such as purple or green.

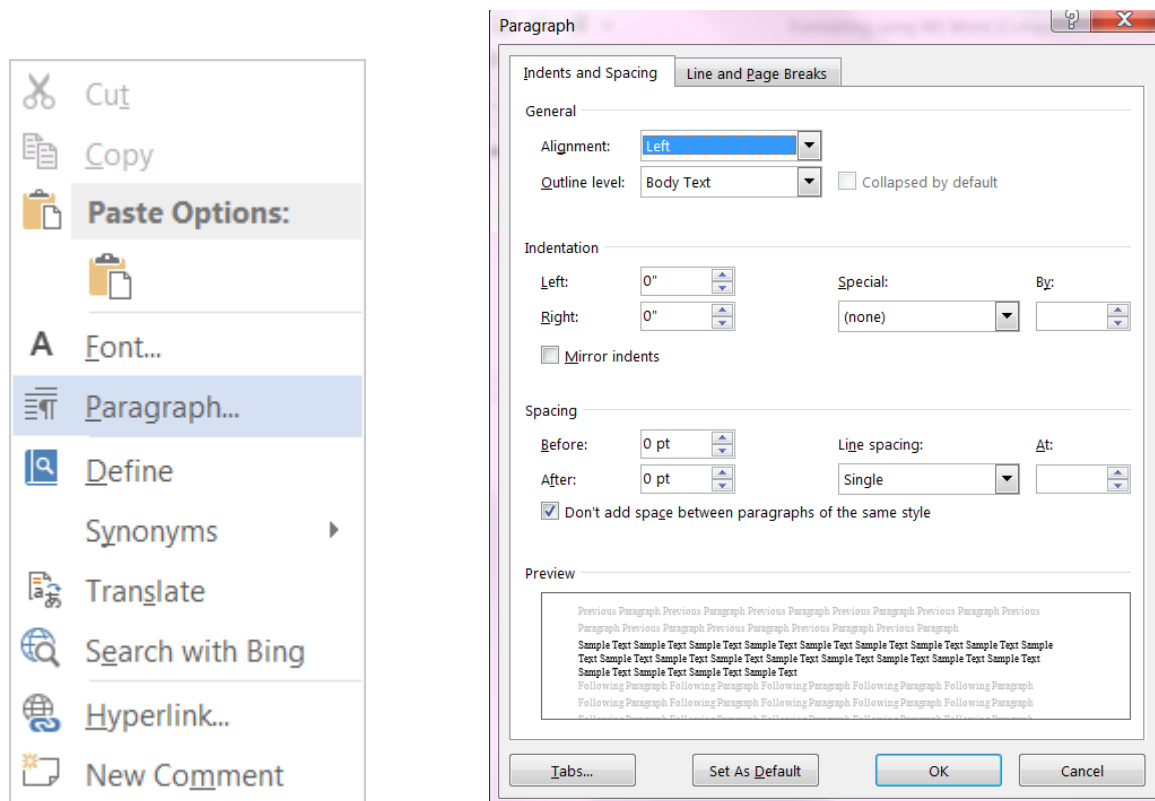


Other tabs have shortcuts which give similar options that are available in other tabs or fuller options, such as the Page Layout gives some, but not as many options for the Paragraph spacing. You can get to the full Paragraph Setting by clicking on the small arrow in the lower right hand corner of the paragraph setting from the Home tab...



or the Page Layout tab or with the right click of the mouse.

... or the Page Layout tab or with the right click of the mouse. Both will bring up the window shown on the right.



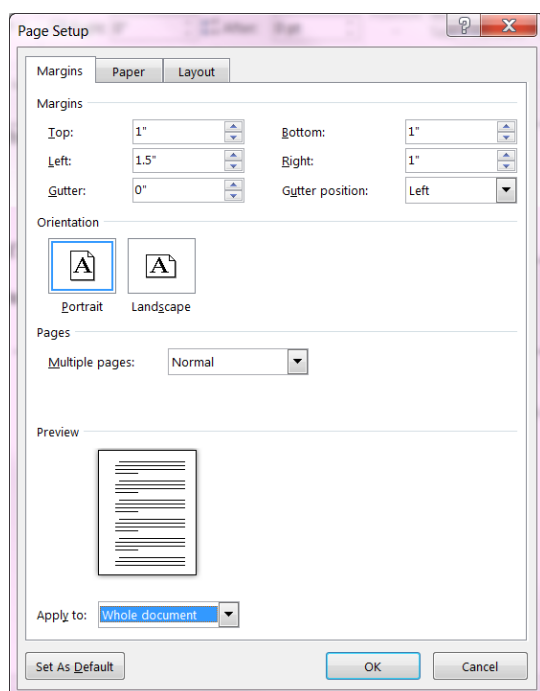
Throughout this Handout you will find a few styles of bullets used to direct you to specific information.

- Arrows are Instructions
- Bullets are GS Rules or comments

SETTING UP A DEFAULT DOCUMENT

Margins

- Entire document must have these settings from the title page through the appendices - no exceptions!
 - Landscape pages - the “top” of the landscaped page will be the “left” margin setting (More on how to format Landscape Pages later) Any figure or table that is too wide for the Portrait layout must be set as a Landscape layout page in the electronic document so that readers do not have to turn the book or electronic device to read it.
- Go to Page Layout tab
- 1.5” Left, 1” top, right and bottom

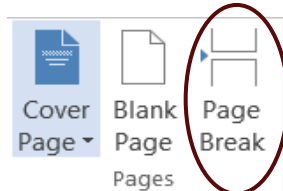


Page Breaks and Section Breaks

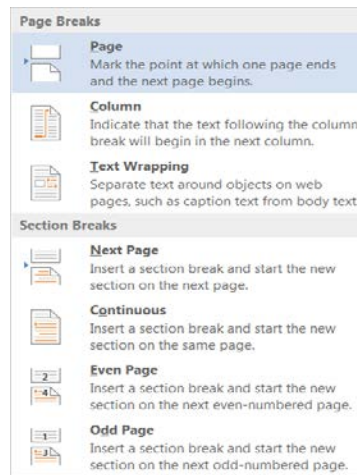
Page Breaks

Use "Page Breaks" prior to the first page of each section (such as at the end of the Table of Contents, Abstract, Acknowledgments, Abstract) or last page of each chapter so that the FIRST page of the next section or chapter doesn't move up and down. Each first page, the first line should start 2" from the top of the page. (Don't change the margin, just enter Paragraph returns to move it to the right location. Keep track of how many paragraph returns you enter so that you use the same number for every "first page." To set a page break, choose either of these 2 options.

INSERT tab, then
Pages, then Page
Break. (at the left
of the ribbon)



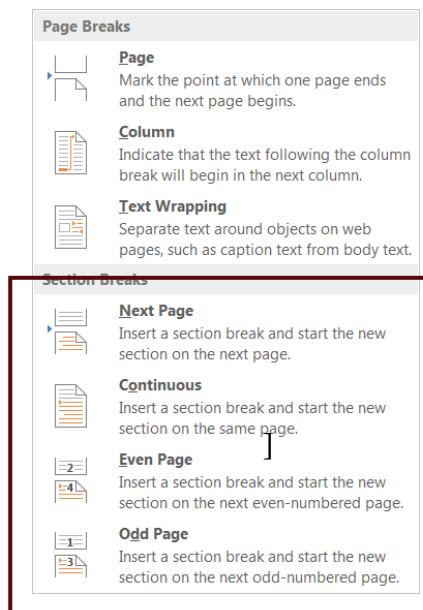
Page Layout
tab
Breaks, then
Page break.



Section Breaks

Use to change style of numbering between the preliminary sections and the main document and also use when changing from portrait layout to landscape layout.

- From the main MS Word Menu – select the “Page Layout” tab, then Breaks
- Select “Next Page” when you want to change the numbering style, such as at the end of the Preliminary Section.
- Select “Continuous” when inserting a landscaped page in the middle of the document

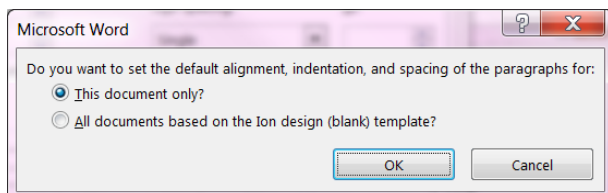
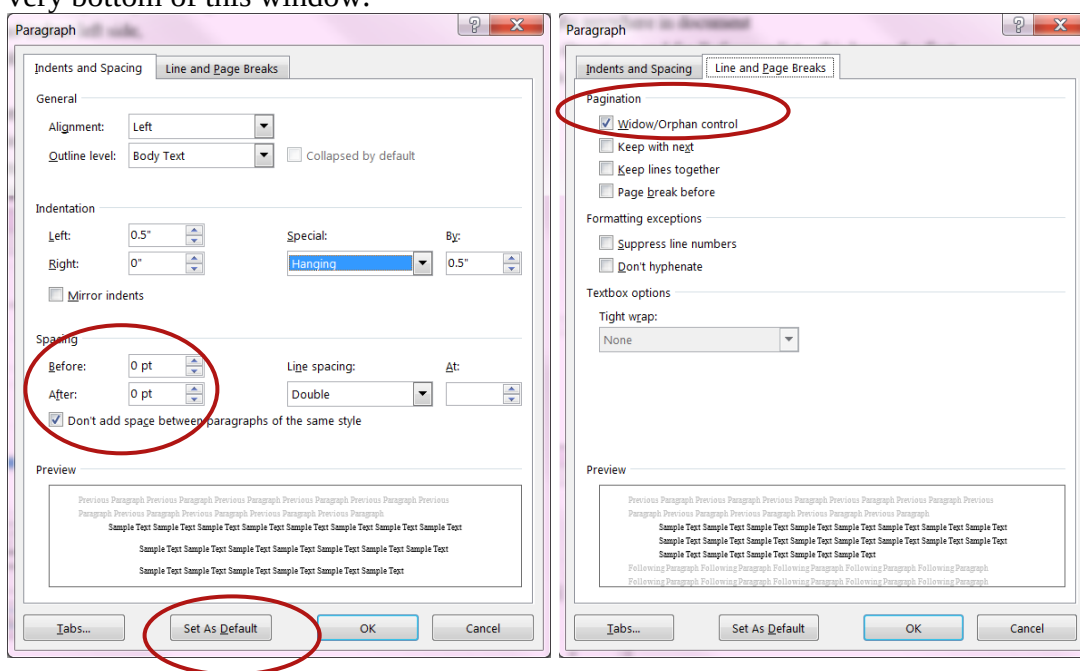


Paragraph Settings

The most common mistake I see is that the author starts out with the correct settings, but as chapters or sections are added (or moving from one computer to another) the settings change. Watch these settings throughout the document, but especially above and below headings. If spacing looks larger above a heading than above others, highlight the section to include the last words of the previous paragraph through the first words of the next paragraph below the heading, and right click to open the paragraph settings. Some "Styles" add extra space. (see tips for style modification later) Check:

- Double-space throughout dissertation except for quotes longer than 3 lines and Research questions
- ALL paragraph indents should be ½ inch.
- Quotes 3 lines or longer-block and indent left side,
- No extra space between paragraphs anywhere in document
- Use hanging indent for Research Questions and for Reference list – this keeps the first line at the left margin and indents subsequent lines in the selection aligned at ½"

Open "Paragraph Settings" through either method explained on page 5. If you are setting this up before your proposal, you may want to set this as your "Default" using the "Set as Default" at the very bottom of this window.



Widowed and Orphaned Line Setting

- When you must divide a paragraph at the end of a page, place at least two lines at the bottom of the page and at least two lines at the top of the following page.
- Do not leave a heading at the bottom of a page (without at least 2 lines of the related paragraph – move to the following page so it stays with the paragraph.
- With EVERY change you make, this will move every line in the document, so always check for stray headings as you make edits
- Open Paragraph setting window, go to Line and Page Breaks, and check the widows and orphans control.

Hint: If you're working in an already written document, highlight all text. It sometimes doesn't catch earlier pages until you've made an edit in that section. If so, usually it will "reset" when you enter a paragraph and delete it, or make other necessary revisions. Every time you copy and paste a paragraph into this document, you may need to recheck the settings. Sometimes old settings come in with the text from another document.

Special Circumstances for Line Spacing

Single-space. Research questions, Hypotheses, and Blocked quotes longer than 3 lines should all be single-spaced. Everything else should be double-spaced. Single-space the questions, but double space between them, as shown below.

Hanging indent. In the Paragraph settings, in the Indention settings, choose Hanging from the dropdown list, and in the "by" box, enter .5"

Use on the author citation in the Abstract, a list of definitions, Research Questions and Hypotheses, and the entire Reference section.

Hint: on the Research Questions and Hypotheses, to get the hanging indent to work properly, enter Q1 (H1) then a tab to the start of the question. Subsequent lines will align under the question, not under the H1, such as:

Q1 Will DOX treatment impair skeletal muscle twitch force production and fatigue resistance when analyzed 1 day following DOX injection?

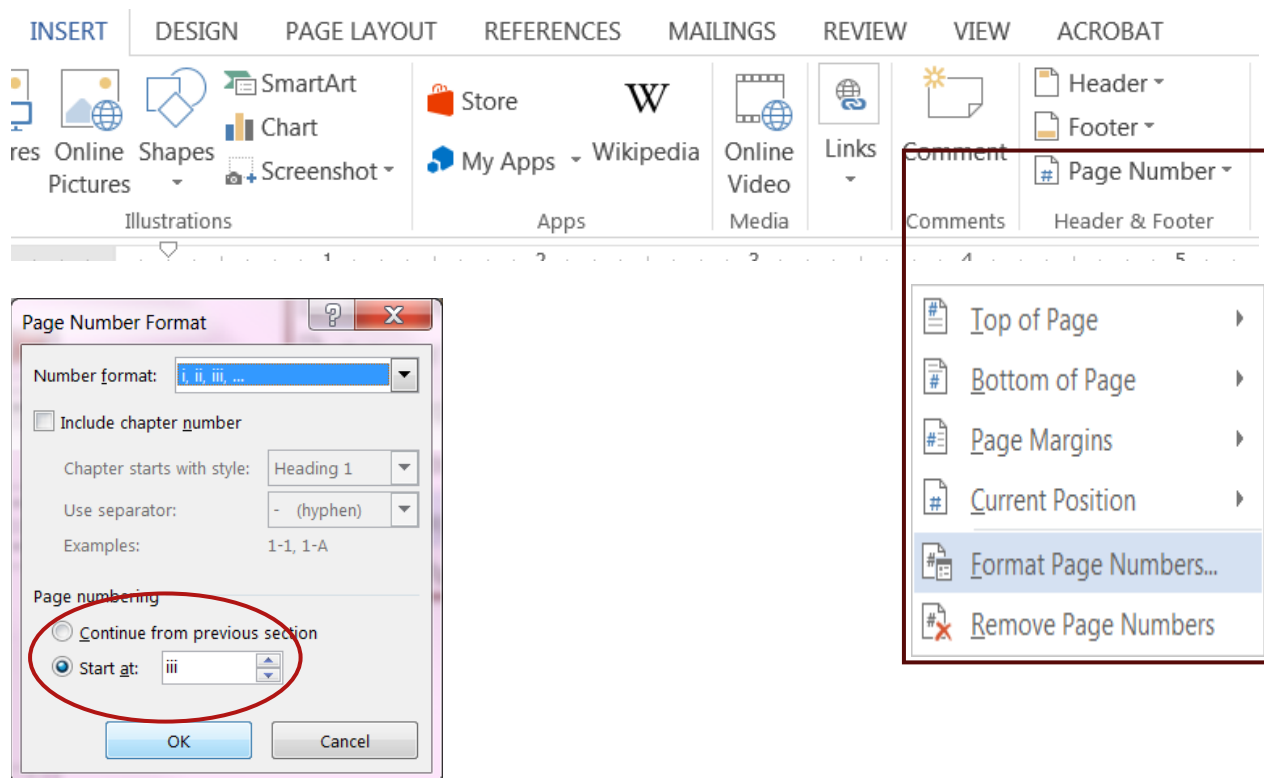
H1 Short-term endurance exercise will minimize DOX-induced myotoxic function.

Adding Page Numbers

Preliminary Section

This includes every page prior to Chapter 1 of the manuscript.

- Always use the same size and style font as the dissertation by highlighting the number (after it's added), click on the Home tab and change the font style and size to match the rest of the manuscript.
- Copyright, Title Page and Signature pages have NO PAGE NUMBERS showing– use a section break at the END of the signature page to insert a new section for the Abstract. (see instructions for Section Breaks and Unlinking sections)
- Abstract is the first page with a number Start the numbering with page iii (even if you have a copyright page, this is page 3, not 4) in the footer (select Bottom of Page, center), lower case Roman numerals.
 - Click on the Insert tab
 - Header and Footer section
 - Page Number it will open the window on the right
 - Choose – Bottom of Page, it will open another window –
 - Choose – Plain Number 2 (Centered option)
 - Then you will go into the Format Page Numbers
 - Preliminary Section, change Number Format to Lower Case Roman Numerals
 - Abstract Page, select iii

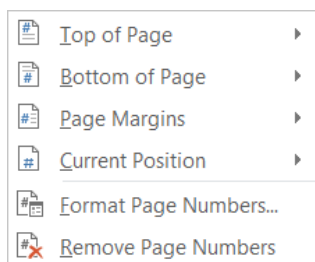


- *Remainder of Preliminary Section* –numbering will automatically continue sequentially in lower case Roman numerals in the footer until you set a new section break. (Hint: insert Page Breaks at the end of each of these: the Abstract, Acknowledgments, Table of Contents, List of Tables, List of Figures, and at the end of every Chapter etc. so the start of each will always stay in the same place on the page 2" from top) Insert a Section Break at the bottom of the last page of the preliminary section (right before page 1 of thesis, capstone or dissertation).
- *Check font style and size* - This is when, if the font style is different than your manuscript, you would double-click to select the numeral in the footer (on first page), and change the font style and size. (Arial or Times new Roman size 12 are the recommended styles). This will change everything in that footer throughout the section.

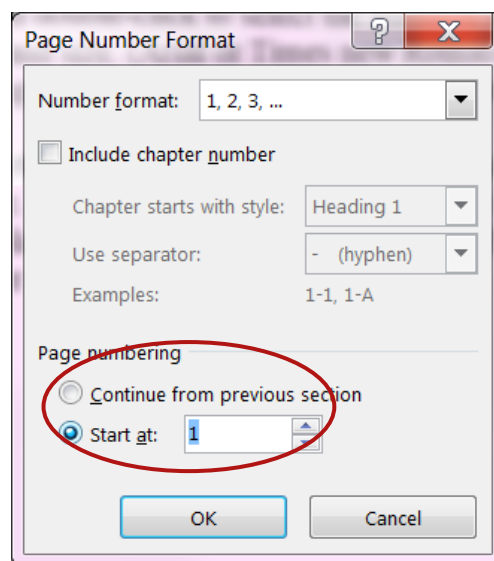
Skip down to the next section on Unlink Page Numbering, then come back to Body of Thesis, Capstone or Dissertation.

Body of Thesis, Capstone or Dissertation

- Page 1 of the Chapters, you're going to Start over numbering with number 1, Arabic numeral, top right of the page. (inside the page header). (Hint: If you insert the page numbering before Unlinking, you will need to go through the Format the Page Numbers step again.)
- Once you select top of page, it brings up another window offering to place in the left, middle or right top of page. Select the top right which they call "Plain number 3"

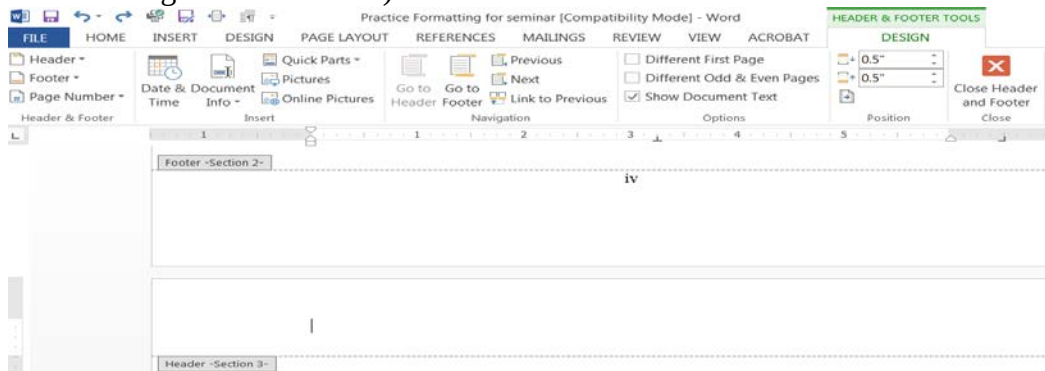


- Then go back to Format Page Numbers
- This time you need to select the Arabic Numbering 1, 2, 3
- Do NOT select continuous, choose Start at: 1

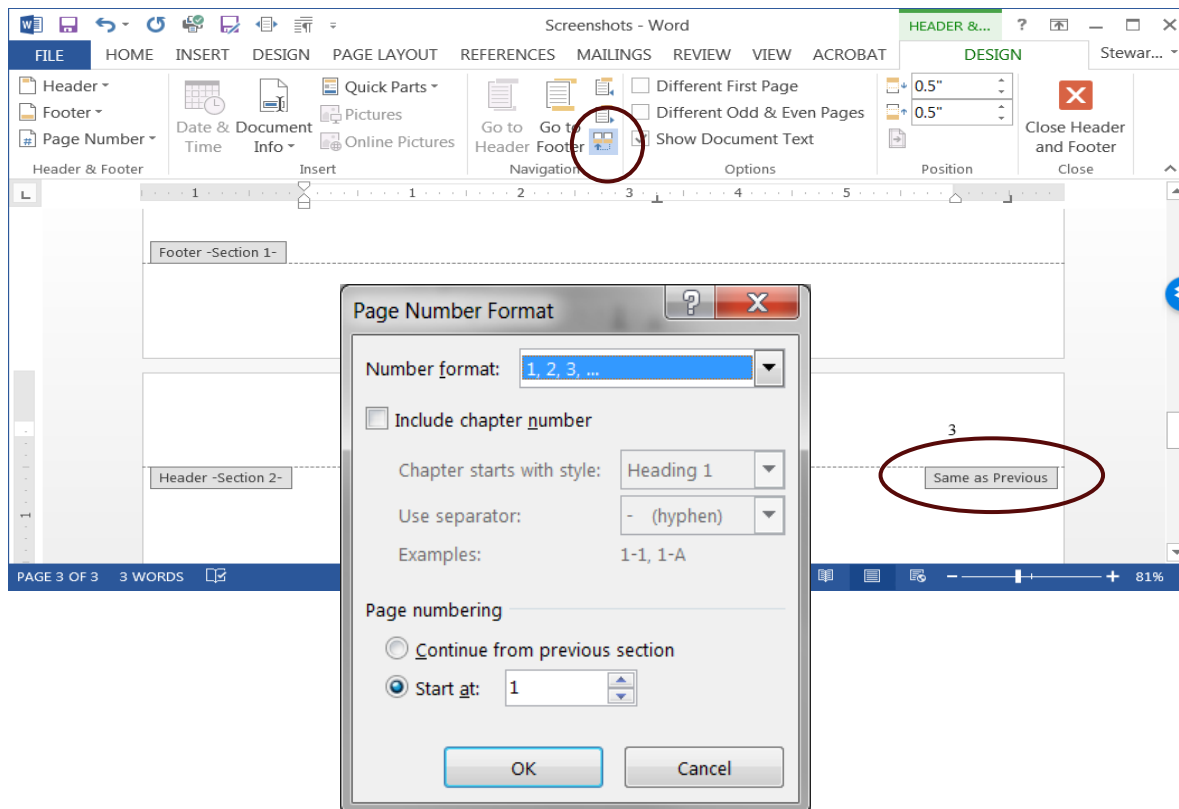


Unlink Page Numbering.

- Necessary between the Preliminary section of a thesis and Chapter 1 of the thesis.
- To do this, you will need to click so you are inside the header or footer,
(Hint: Once you click inside the header it will open a new tab called "Header and Footer Tools" on the right of the ribbon.)

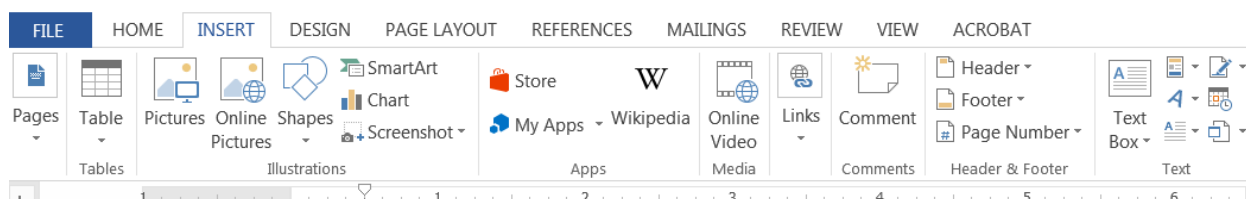
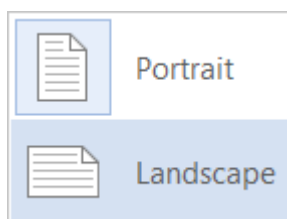


- Select UNLINK to Previous in the Navigation section. (Hover over the icon to see if it's set as Link or Unlink. If it's Unlinked, it will not show anything in on the header on the next page (where the example says "Same as Previous")
- Go to "Format page numbering"
- Use "Start at: [page number]" when you are going to start over with a different page number (such as page 1 for the first page of Chapter 1)
- Use "Continue from previous section" ONLY in the case of the page in the middle of the document. (such as a landscaped table in chapters)



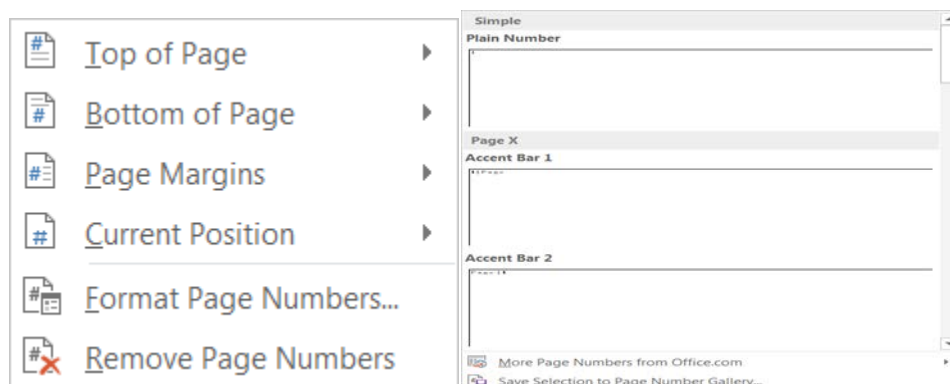
Landsaped Pages.

- At the bottom of the previous page, insert a new section and Unlink from Previous section.
- Page Layout – change to Landscape.
- The page number should be moved to the same position as it is on the printed portrait pages. This is a 2-step process in most cases.

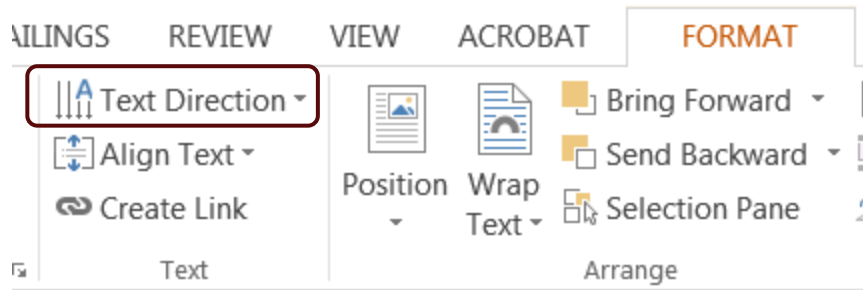


Adding the new page location.

- Create a text box, move it to the correct position in the lower right of the landscaped page.
- Insert a page number inside the box, either manually or using the Page Number feature, be sure to select “current position” – then Plain Number



- Resize the text box as tight as you can so it doesn't cover up any of your text when it's moved.
- Remove the border around the text box.
- Turn the text within the text box so it reads the same direction as the portrait pages.
- Click in the text box, a new click Tab “Drawing Tools” will appear to format the text.



Covering the number in the wrong location.

- This can also be used in the preliminary section if you don't insert section breaks.
- Insert- Text box close to the location but **IN THE DOCUMENT**, not in the header or footer
- Move the text box to cover the page number. \If it is totally in the header or footer it will cover the page numbers on every page. When it is placed in the document, it only covers the number on that one page.

EXAMPLE OF A LANDSCAPE PAGE LAYOUT

Table 1

Title of table in italics

Column 1	Column 2	Column 3	Column 4	Column 5	Column 6	Column 7	Column 8	Column 9	Column 10
----------	----------	----------	----------	----------	----------	----------	----------	----------	-----------

Creating a landscaped page in the middle of the document requires using a Section Break and UNLINK the section from the previous section, prior to the landscaped pages and at the end of the landscaped page or pages

Text boxes can be used to cover up the page number in the upper right corner for the printed dissertation where you need it showing in the lower right corner of the page.

- 1) Insert a text box in the document (not in the header or footer
- 2) In the lower right text box, insert the page number, highlight the the page number using drawing tools in the FORMAT tab in MS Word.

The last step is to remove the border from the text box, format

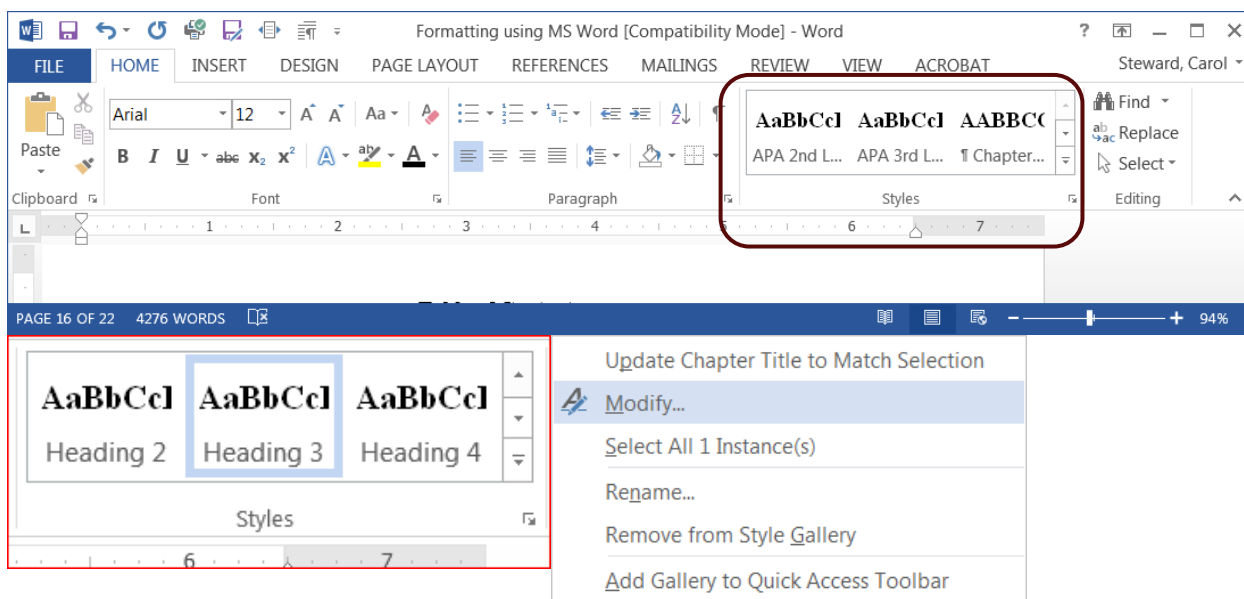
Things to remember,

- 1) remove borders after they are in the right location so you know where the text box is {top right is gray just so you see it is covering the page number, I would normally slide it totally to cover the page number and say “no border” and you’d never know it’s there}

Table of Contents

Automatic Table of Contents

To utilize the “Automatic Table of Contents” Feature, you must use the Styles gallery on the Home tab to set your heading format in the document. (Hint: This works best if it's added BEFORE you have the dissertation written and diligently update as you write. AGAIN, test this feature in a TEST document if you're doing it after the writing is complete, it will test your patience. Do NOT try this at the 11th hour before your final manuscript is due to the Graduate School. This takes time to set up and it's tedious work but may be worth the tradeoff when it comes to creation and constant updates of the Table of Contents. (Hint: Even with the Styles set, you will need to adjust the format and design of the Table of Contents as the last step before turning it in - for example, don't leave bold font and italics in the table of contents))

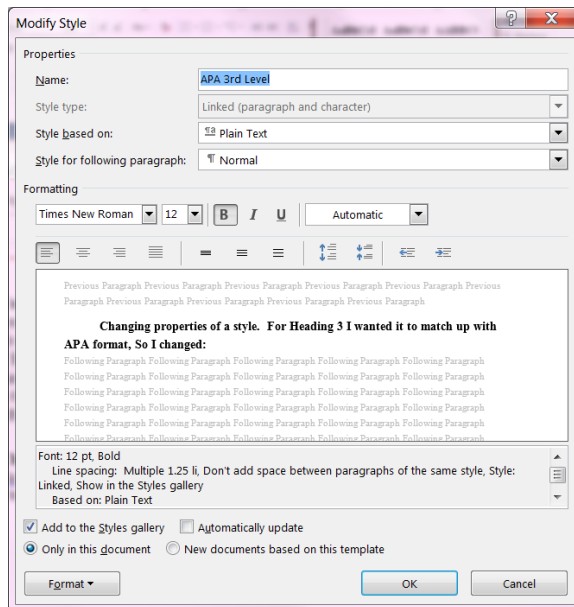


Using and Modifying Styles. Label all of your chapter titles headings (e.g. “Chapter #” and “Introduction, or Review of Literature”) in the style Heading 1 (or Chapter, but however you choose to do it, you MUST keep track of what "level" it "should be" because setting styles does "update" format in the document as well as in the Table of Contents, so you MUST make sure you've modified all levels to match the style manual you are using. (Hint: Don't rename the style, just keep track of which YOU are using as Chapter title, Subheading 1, 2, 3, etc. Keeping the names MS Word uses will make the setup of the final Table of Contents easier.)

Changing properties of a style. For Heading 3 I wanted it to match up with APA format, So I changed:

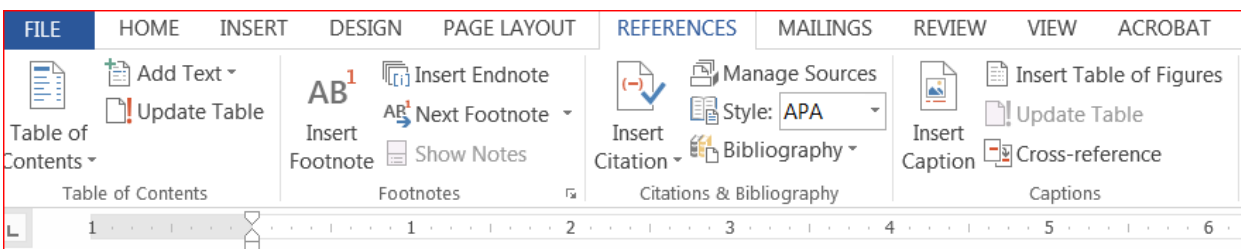
- Font to match size, style (Times new Roman) and Color to black
- I removed the extra space

- For paragraph heading ending in a Period (APA level 3) make sure you select **ONLY** the words – do not include the period or it will set all of the paragraph in the style and include it all in the Table of Contents.
- You can make adjustments at any time, click the automatically update, and it will update **ALL** of this style.



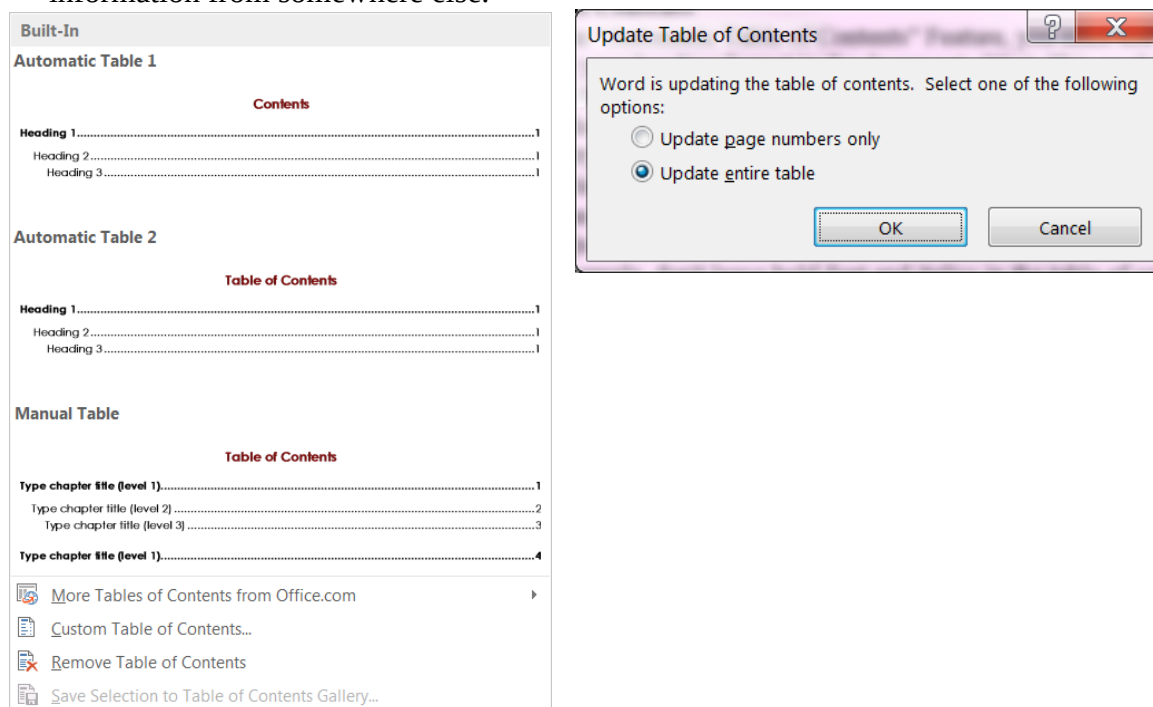
Inserting the Table of Contents. If you have used Heading styles in your document, (make sure you haven't missed any) creating an automatic table of contents is easy.

- Place your cursor where you want your table of contents to be, usually around page iv or v (Hint: once it's properly placed in the document and is "working" once you click anywhere in that page, it will turn gray, indicating it is pulling that information from your document.)
- On the References Ribbon, in the Table of Contents Group, click on the arrow next to the Table of Contents icon, and select *Insert Table of Contents...*
 - Note: If you are using Word 2013, this option is called *Custom Table of Contents*.



- If you want to change the style of your table of contents (e.g. you want more space between the items on level 1 and level 2 of your table of contents, or you want all your level 1 items to be bold), click on the *Modify* button, select the TOC level you want to change, then click the *Modify* button to do so.

- If you want to change which headings appear in your table of contents, you can do so by changing the number in the *Show levels:* pulldown. (This is why it simplifies it to use MS Word's default options. If you create your own, you need to always use the Custom Table of Contents)
- Click *OK* to insert your table of contents.
- The table of contents is a snapshot of the headings and page numbers in your document. At any time, you can update it by right-clicking on it and selecting *Update field*. (Hint: if you're sure you have all chapters and headings that you want included - such as all 1st and 2nd level headings – you can select "update page numbers". If you've revised subheadings, select "Update entire table".) Notice that once the table of contents is in your document, it will turn gray if you click on it. This indicates that it is getting information from somewhere else.



Manual Table. Manual creation of a neatly organized Table of Contents, step-by-step instructions are on the UNC Graduate School website.

<http://www.unco.edu/grad/forms/pdfs/TableOfContentsExample.pdf>

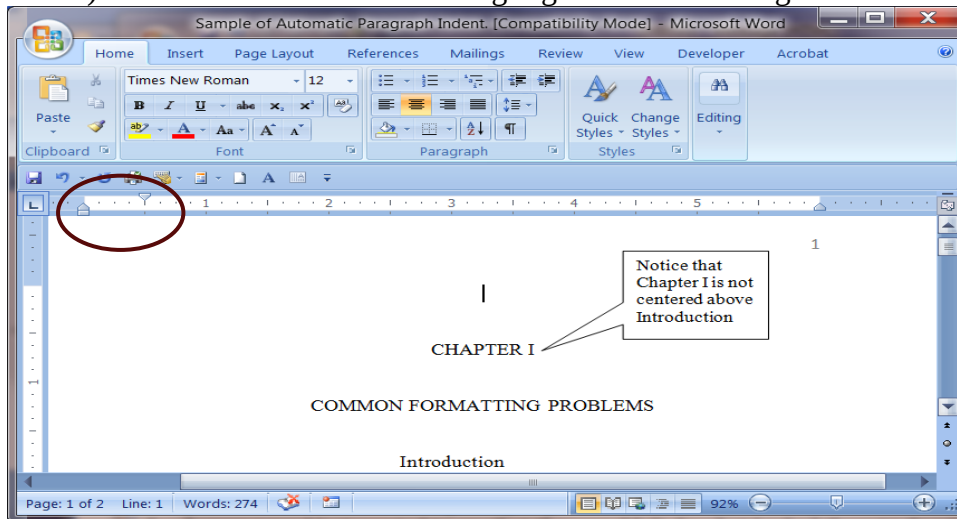
List of Tables and List of Figures

To utilize the “Automatic” lists of the titles and Figure captions, use the “Insert Caption” feature under the References tab. but a manual list can be created using the same instructions as the Table of Contents instructions above.

Centered Headings

Check centered titles or headings to be sure they're not off center (too far to the right usually) because there is a tab on the line prior to you telling word to center. This often happens

because of automatic paragraph indent setting. If you go to the beginning of the Centered words, look to see if the arrows on the ruler across the top of the document ruler show a gap, it is inserting the Paragraph indent before the Center code takes affect. To remove it, backspace to the beginning of that line, it should erase the tab. If it does not, click on the top arrow (the Paragraph indent) and slide it to the left. Then highlight the full heading and center it again.



Heading format

Format must follow the Style Manual adopted by your program. If you are going to use the Styles gallery in MS Word, it is your responsibility to make sure it is set properly to match your style manual, and that it prints properly in the Table of Contents, no colored font, correct usage of bold and italics. A list of current approved heading format from several styles are listed on the GS Website.

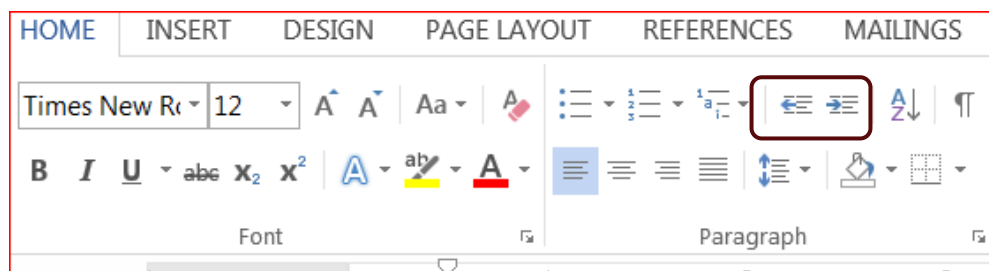
http://www.unco.edu/grad/new_current/resources/formatting/HeadingExamples.html

Block Indent

Only the left Side needs to be indented ½", do not use

- Research Questions – Easiest if you tab between the Q1 and the start of the question, then use the hanging indent feature (in the Paragraph settings) (see specific instructions for Research Questions/Hypotheses under Hanging Indent)
- Hypotheses
- Quotations longer than 3 lines. Do not use quotation marks on the block indented text, include the citation.

To indent a several lines, Highlight the text, In the Home tab, Paragraph Section,



Example of a blocked quotation:

Your work is going to fill a large part of your life, and the only way to be truly satisfied is to do what you believe is great work. And the only way to do great work is to love what you do. If you haven't found it yet, keep looking. Don't settle. As with all matters of the heart, you'll know when you find it. (Steve Jobs)

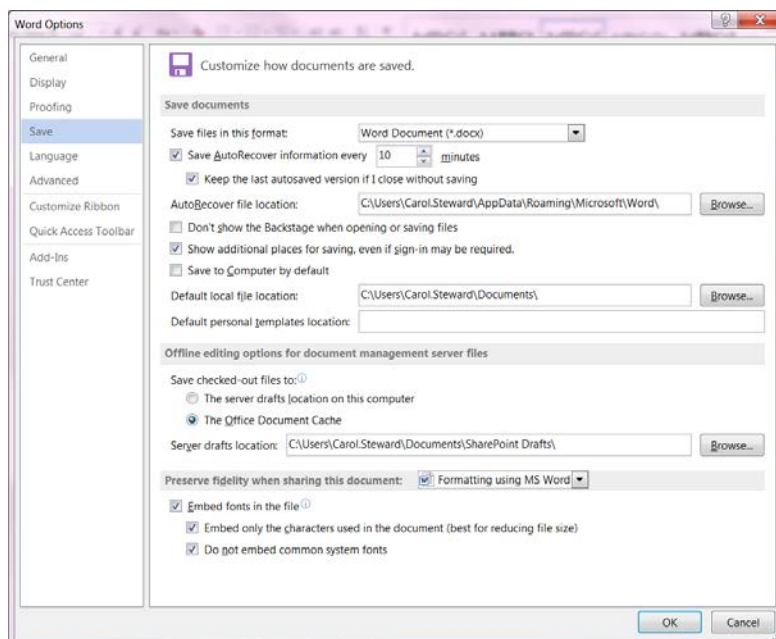
Embed Fonts

This simply means that all of the font information used to make your document look the way it does is stored in the PDF file. So no matter what fonts someone else has on their computer, they'll be able to see the file as you intended it to be seen.

If you don't embed fonts, Adobe Acrobat will make its best guess at font substitution using whatever fonts are available on the reader's computer. Substitution can result in significant differences between your intended output and what the reader observes (particularly with equation or symbol fonts), so it is best to have the fonts embedded.

To embed your fonts in Microsoft Word 2007 (and 2010 or 2013):

- Create your manuscript using a TrueType font. Recommended fonts include Times-Roman and Helvetica.
- Click the circular Office button in the upper left corner of Microsoft Word. (FILE in the 2010/13 MS Word)
- A new window will display. In the bottom right corner is a button, Word options. Click the Word Options button. (Options in 2010/13)
- Choose Save from the left sidebar.
- Check the box next to Embed fonts in the file.



Tables

Create MS Word Tables, as they are easy to design and adjust to meet Publishing Guidelines. Most style manuals remove the internal lines.

- Summarize data rather than directly importing tables from SPSS, SAS, Excel or other programs. If you do choose to bring them in from another program, be sure they meet Style guidelines. It must be cleaned up to include only the related data. (Raw data allowed in the appendix per committee instruction)
 - Double-space short tables, and begin and end on the same page.
 - Start long tables at the top of the page, single-space, and continue to the following page(s) if necessary. If the table runs on to more than one page, include “Table #, continued” at the top of each subsequent page. Repeat column headers on each subsequent page.
 - Use consistent line thickness for lines
 - Make sure all tables have opening and closing line, and a line below the Header row.
 - Use Statistical Abbreviations – do not include % in data, use it in the header row
 - The Table numbering and name should follow the style manual you are using in your program.
- Add all information within the table first, then removing the lines.

Setting up a Table

- ALWAYS create your table in a different document so you're not messing up your manuscript.
 - Don't use quick tables, as they're not as easy to adjust to meet guidelines. (you'd need to change fonts, color of text AND color of the lines. They don't normally meet Publishing Style manual guidelines.)
 - Insert tab
 - Click Table, and it will bring up a pick list allowing you to choose how many rows (up and down) and columns (across) that you need. It's easy to add more later if you need to.
 - Table and Number belong outside the table. Don't try to include it inside the table "grid"

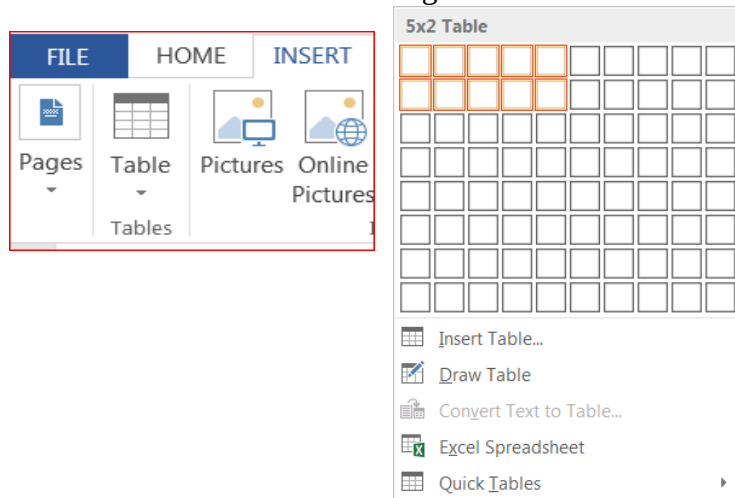


Table 5

Pearson Correlation Matrix among Benchmark Scale Scores and Global Ratings

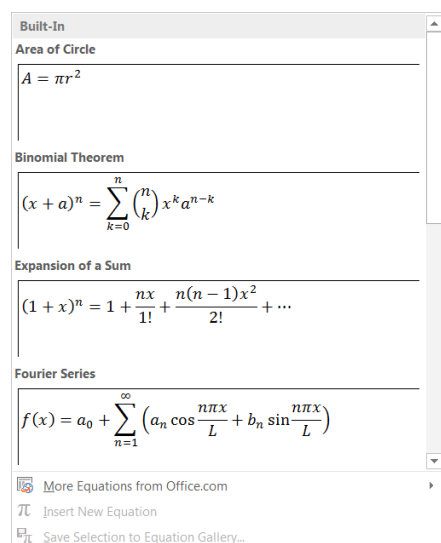
	Admin Rating	Instruct Rating	Ease Rating	Overall Rating
Scale Score	0.661**	0.857**	0.738**	0.893**
Admin Rating	1	0.460**	0.608**	0.630**
Instruct Rating			0.595**	0.802**
Ease Rating				0.690**

**p < 0.01

Inserting an Equation

It's extremely important to make sure your equations are set up in the Word document, don't set them up in another program or as a tif or they will be blurry in the pdf. If you don't, they will not convert clearly to a pdf.

INSERT tab: Equation, it will either add a box into your line to add and design your own equation, *Type equation here.* or you can choose the dropdown list



References

UNC University Libraries has partnered with RefWorks for our students scholarly writing. It helps Organize sources and create bibliographies, and is fully supported by the University Libraries staff. For more information, go to www.libguides.unco.edu/refworks

Appearance of your references.

- Keep the source name flush with the left margin. (only the first line if the group of authors is longer than will fit on the one line.
- Must be in correct order to meet your program requirements (most are alphabetical)
- Use hanging indent for 2nd and subsequent lines of author citation.
- You may choose to use single-spacing, for each group, but double-space between groups.
- Don't divide a group between pages. IF it all doesn't fit on one page, move the entire group to the next page

Checking references and citations.

Find feature in MS Word works, but I still prefer the Advanced Search feature in the Adobe Reader.

The screenshot displays the Adobe Acrobat Pro interface. On the left, a search panel is open, showing the search criteria 'chapter in the current document' and results for '1 documents with 12 instances'. The search results list several documents, including 'Microsoft Word - Chapter 1-6.doc', which has 1 instance in metadata. The search results are displayed in a list view, showing the document name and the number of instances found. The search panel also includes a 'New Search' button and a 'Collapse file paths' checkbox.

The main window shows the 'TABLE OF CONTENTS' for a document titled 'DeWar.A.11.11.11.pdf'. The table lists the following sections and their page numbers:

TABLE OF CONTENTS	
CHAPTER	
I.	INTRODUCTION.....1
	Rationale.....4
	Statement of Purpose.....7
	Delimitations.....7
	Definition of Terms.....8
II.	REVIEW OF LITERATURE.....9
	Developmental-Ecological Perspective.....9
	Parent Involvement.....11
	Epstein's Framework for Parent Involvement.....15
	Academic Achievement.....16
	Academic Achievement in Preschool.....20
	Learning Behaviors.....22
	Social Competence.....23
	Conclusion.....26
III.	METHODOLOGY.....27
	Participants.....27
	Measures.....28
	Learning Behaviors.....28
	Social Competence.....29
	Parent Involvement.....30
	Procedures.....31
	Analysis of Data.....34
	Research Questions.....34

The page number 'vii' is visible at the bottom of the page.

Other Helpful Advice

- Thesis, Capstone & Dissertation Resources Web site
www.unco.edu/grad/current/Resources/index.html
- Learn as much as you can about your word processing program early in the process.
- Weigh pros and cons of hiring a typist – be VERY specific on what you want to pay them to edit. Plan to work hand-in-hand with the typist through the process.
- Dissertation Format Manual – Use it from proposal through dissertation to make the transition from one to the other cleaner and less headaches for you.
- Style Manual adopted by your program – I not only check to be sure you're following the Graduate School guidelines, but your program's style requirements. If your program has an approved Journal Format, make sure you're following the agreed upon arrangement.
- Save document often, email it to yourself every time you make changes, keep in multiple places at every stage of the writing process
- Do NOT bounce back and forth between computers (especially between a Mac and a PC) at the final editing stage. It will mess with your settings.