



# *Formatting Essentials*

*in Microsoft Word*



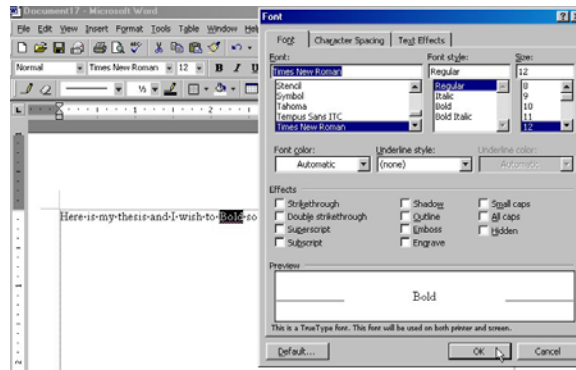
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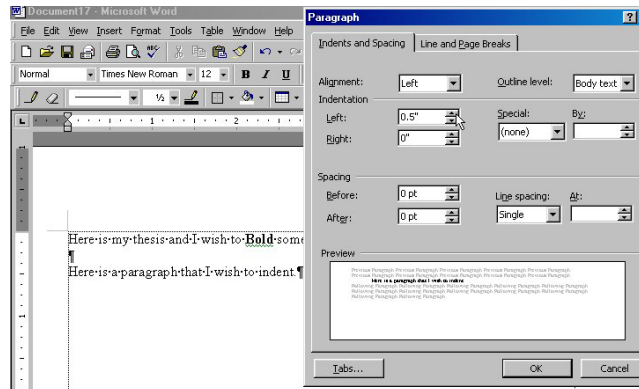


## Character vs. Paragraph formatting

**Character formatting** is the application of formats such as bold, italic, underline, font type, and font size to a selection of text. A standard method of using character formatting is to highlight the text, then choose the format you like, either from the formatting toolbar, or from the menu bar using format, font.



**Paragraph Formatting** is the application of formats that effect an entire paragraph, such as alignment (left, center, right, justify), indents, bullets and numbering and line spacing. Paragraph formats can be accessed from the formatting toolbar, or from the menu bar using Format, Paragraph.



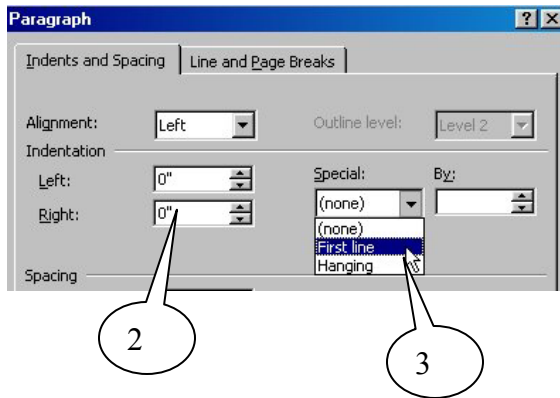
## Using Show/Hide to reveal non-printing characters

Your standard toolbar contains a 'show/hide' button which allows you to toggle on the display of non-printing characters in your document. This includes spaces, tabs, paragraph marks and others items which may influence the appearance of your document. It is recommended that you keep show/hide on while you are perfecting your formatting.



## Setting Indents

1. From the menu bar, select Format, Paragraph.
2. Full indents (left or right) are set on the left side of the window.
3. First Line and hanging indents are set from the drop down menu on the right.
4. Once your indents are set, click OK.
5. To apply an indent (such as a first line indent) to every paragraph in a document, select all the paragraphs, and then use Format Paragraph to set the indents.



### Types of indents

**Full Indent:** This paragraph has a full indent applied. All lines of text in the paragraph are indented  $\frac{1}{2}$  inch from the left margin. Full indent is the default in Word, and is what you get from the 'increase indent' button on the formatting toolbar.

Full indents can be set on the left margin, right margin or both.

**First Line Indent:** This paragraph has a first line indent. Only the first line in the paragraph is indented, and the rest start at the left margin.

**Hanging Indent:** This paragraph has a hanging indent, which is used in bulleted lists and footnotes. All lines except the first are indented.

## Tabs

Many people use the tab key on their keyboard, rather than indenting. The tab key by default will give you  $\frac{1}{2}$  inch of space, and can be placed anywhere in a line of text. You can use tab many times within a paragraph, while indent will only apply once at the beginning of a paragraph.

Because tab can be used multiple times within a paragraph, custom tabs can be very helpful to line up text in columns, as you see below:

The image shows a screenshot of Microsoft Word with a table. The table has three columns: 'Name', 'Date', and 'Amount'. The text in the table is aligned using tabs, as evidenced by the vertical dotted lines extending from the top of each column. The table content is as follows:

Name	Date	Amount
John	3/21/02	\$5.95
Sue	3/19/02	\$4.50

## Setting Custom Tabs

1. Be sure the ruler is displayed at the top of your Word window. If it is not, select View, Ruler to make it visible.
2. Select the type of tab stop you want to set by clicking on the tab symbol on the ruler



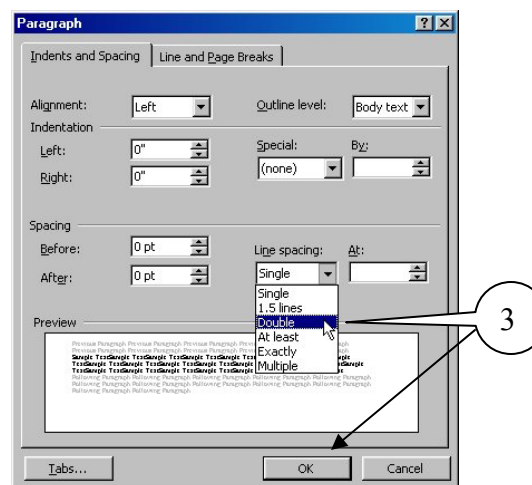
Tab type	Tab Symbol
<b>Left Tab:</b> aligns text with the tab position as a left margin.	
<b>Right tab:</b> aligns text with the tab position as a right margin.	
<b>Center tab:</b> centers text on the tab position.	
<b>Decimal tab:</b> Aligns the decimal point in a number on the tab position.	

3. Click the location on the ruler where the tab stop is to be located. Use your keyboard's tab key to move the cursor to that position and begin typing.
4. To clear a custom tab, drag the tab marker off the ruler.

## Line Spacing

By default, the text in a document is single-spaced. Spacing is a paragraph-formatting feature, and will be found in the Format, Paragraph dialog.

1. Select the paragraphs you wish to apply double spacing to.
2. From the menu bar, select format, paragraph.
3. In the line spacing area, set the spacing you want, and click OK.



Shortcut for double spacing:

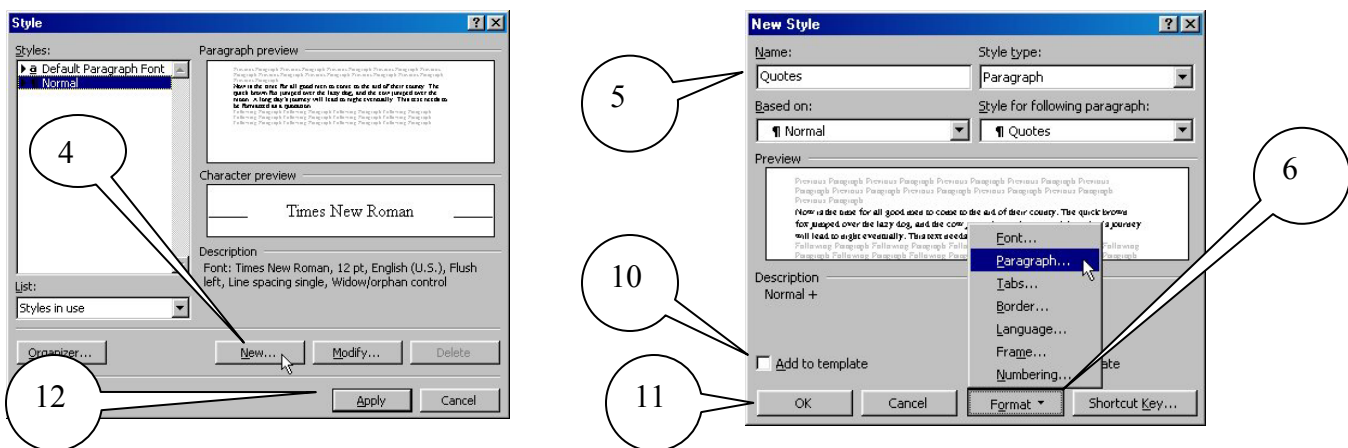
Click in the paragraph you wish to set double spacing for and press Ctrl + 2.

## Using Styles to Create Consistency in Formatting

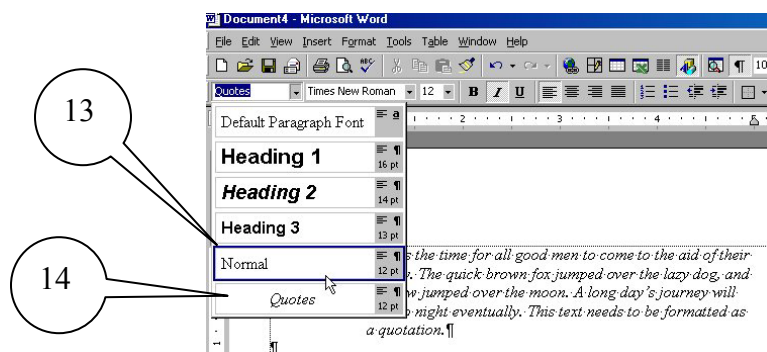
Styles are a collection of formats that have been given a name, and can be applied in any document. A good example would be the formatting required when you type quotations in a document. Quotations are usually indented from the left and right margin, and in italics.

Creating and applying a style for quotations:

1. Type your quotation in regular font without any formatting.
2. Place your flashing insertion point somewhere in the paragraph.
3. From the menu bar, select Format, Style.
4. In the style dialog box, click the “new” button.
5. In the new style dialog box, type a name for the new style (such as ‘quotes’).
6. Click the format button and select paragraph.
7. In the paragraph dialog, set the left and right indent as needed and click OK. (See page 6 for setting indents.)
8. Click the format button and select font.
9. In the font dialog box, select italic for the font and click OK.
10. You will be returned to the style dialog box. By default, this style will only be available to this document. If you wish to make it available to all documents, click the checkbox for ‘add to template’.
11. Click OK to complete creation of your new style.
12. Click Apply to apply the style to the current paragraph.



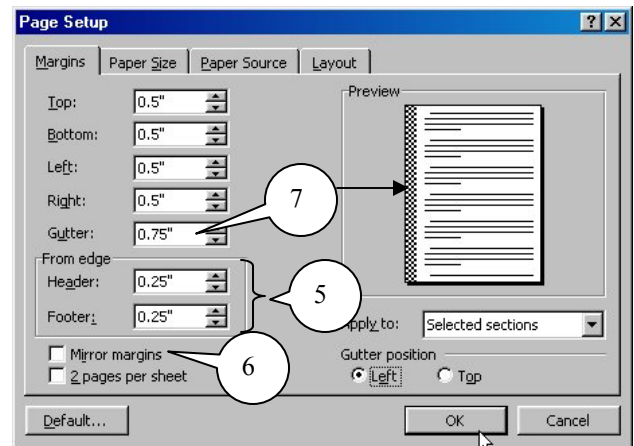
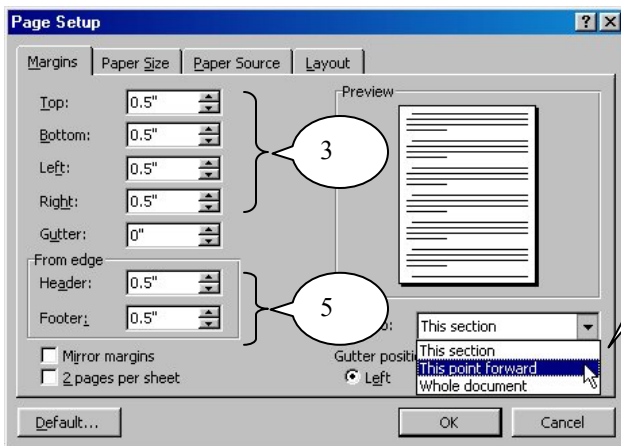
13. To switch back to normal font, start a new paragraph, and use the style box to change back to ‘normal’.
14. Next time you add a quotation, after typing it, and select your quotes style from the style box to apply that formatting.



## Page Setup Issues

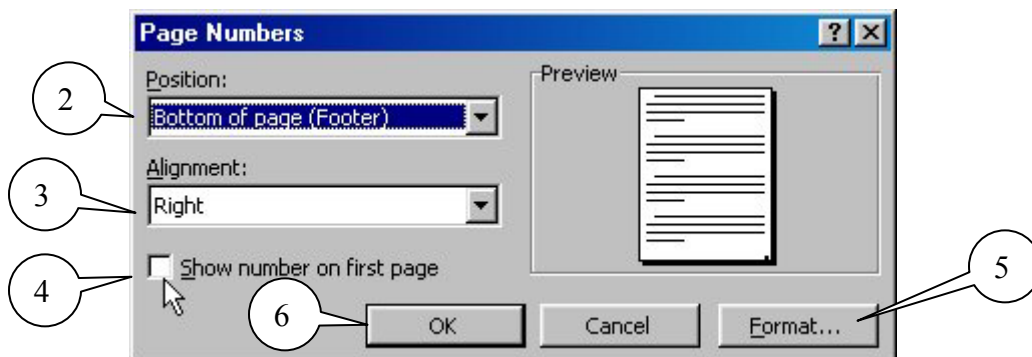
### Margins

1. From the Menu Bar, select File, Page Setup.
2. Select the margins tab.
3. Adjust the margins as needed.
4. Set the part of the document you wish to change, and click OK.
5. If you are using Headers and Footers, be sure not to overlap your top margin with your header margin or your bottom margin with your footer margin.
6. If the document is to be bound, you may wish to select the “mirror margins” checkbox, and set the inside and outside margins, rather than left/right margins.
7. A gutter allows extra space in addition to the margin for binding a document.



### Setting Page Numbers

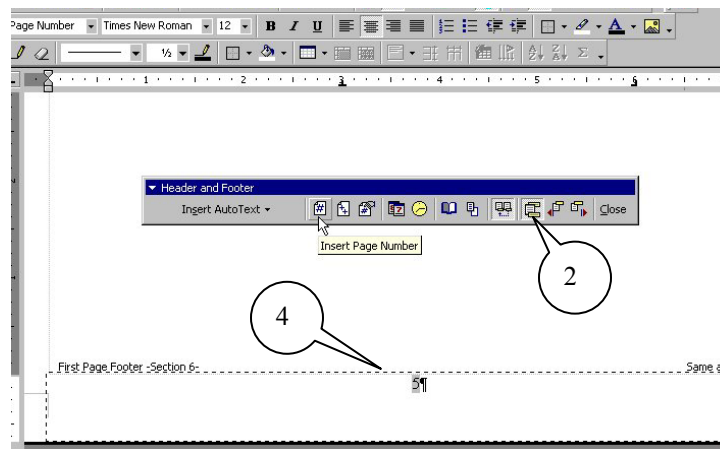
1. From the menu bar, select Insert Page Numbers.
2. Select the placement for the page number (header or footer).
3. Select the position for the page number (left, center or right).
4. Use the checkbox to determine whether you wish the page number to appear on the title page.
5. If you wish to change the type of numbering ( 1,2,3 vs. A,B,C vs. I,II,III ), use the format button.
6. Click OK.



## Editing the Page Number or other Header/Footer

When you use “Insert Page Numbers” it places the page number in a header or footer. They can only be edited from the header/footer window.

1. From the menu bar, select View Header and Footer.
2. This brings you to the header area. On the Header/Footer toolbar, select the button for “Switch between header and footer” if you would like to edit a footer.
3. You can type in the header or footer area, or use the toolbar to add fields.
4. Highlighting and deleting the page number field will remove page numbering.
5. Page numbering can also be set directly in this area (instead of from Insert, Page Numbering).

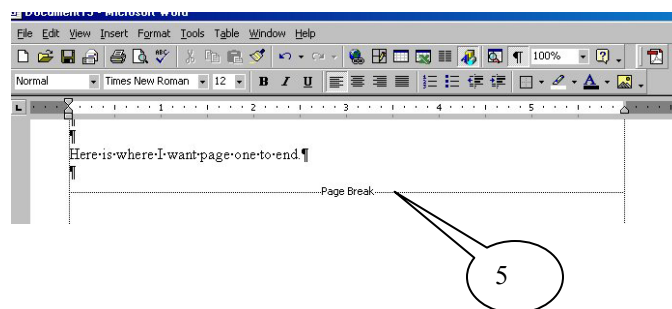


## Using Page Breaks and Section Breaks to Control Document Layout

### Page Breaks

Word automatically does a page break when your text reaches the bottom margin of your document. Sometimes the breaks are not where you would like them. To insert manual page breaks:

1. Position your cursor where you would like the page break to occur.
2. Press Ctrl + Enter
3. If your show/hide button is “on”, you will see the page break in the document (it will not be visible in print).
4. The page break can be deleted if necessary, by clicking once on it and pressing the delete key.

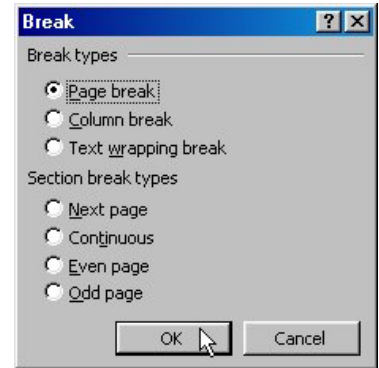


## Section Breaks

When you create a new document, it is made up of just one section, which can be one line or many pages in length. A section can be as small as a single paragraph, however, and a document may be broken into sections if you wish to vary the formatting throughout. The kinds of changes that can be applied to individual sections include: its margins, orientation (portrait/landscape), headers and footers, and paper size.

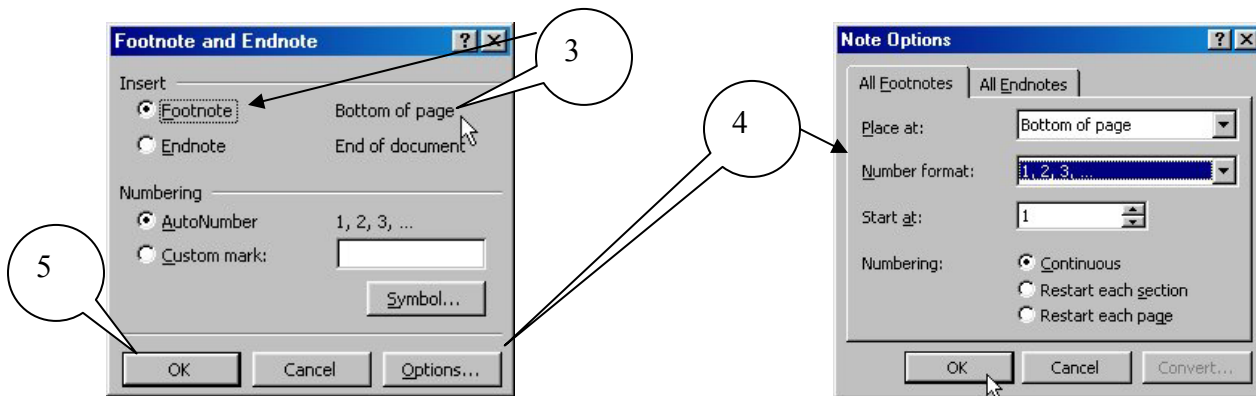
### Using sections to make one page “landscape”:

1. Position your flashing cursor at the bottom of the last “portrait” page.
2. From the menu bar, select Insert, Break.
3. Select the Next Page option button and click OK.
4. Position your cursor at the bottom of the page that is going to be “landscape”.
5. From the menu bar, select Insert, Break.
6. Select the Next Page option button and click OK.
7. Position your cursor on the page you would like to make “landscape”.
8. From the menu bar, select File, Page Setup.
9. On the Paper Size tab, select Landscape.
10. Be sure the Apply To: window says This Section, and click OK.

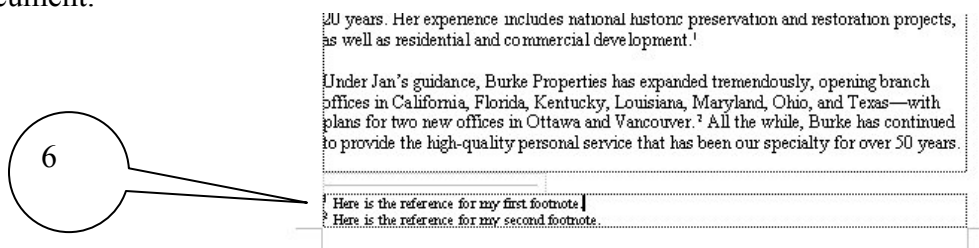


## Adding Footnotes

1. Click to place your insertion point where the footnote reference should appear.
2. From the menu bar, select Insert, Footnote.
3. From the Footnote and Endnote dialog, be sure footnote is selected, and note the location the footnote will appear.
4. Use the options button if you wish to change the number style or location of footnotes.
5. Click OK.



6. Word will position your cursor in the location for footnote text, and will automatically number the footnotes. Once you have typed the footnote text, click back in the document to resume typing in the document.



## Troubleshooting Footnotes

There are (at least) 3 possible problems with Word's automatic footnotes. Here are some suggestions for dealing with them:

**Problem 1:** The footnote text area uses a superscript number <sup>1</sup> and the style manual you are following says to have the number appear like this: 1.

**Solution:** Edit the style for footnote text to make the number a non-superscript number. Once that is edited, you can either manually add the period, or write a macro to do this. Contact Tech Services for assistance if needed.

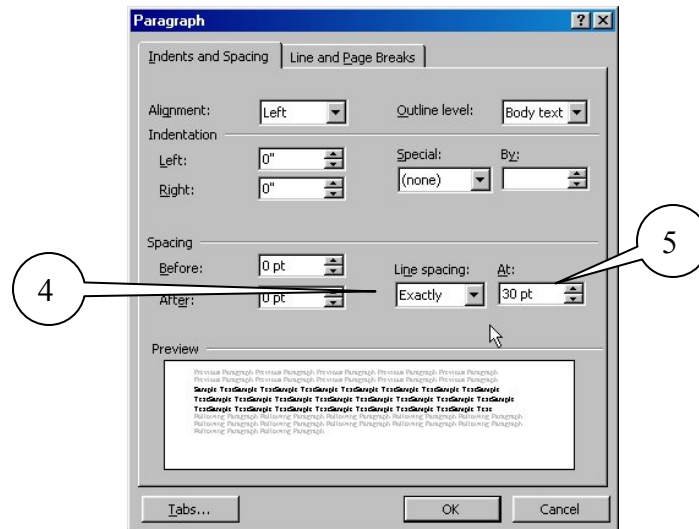
**Problem 2:** The style manual says to make the footnote a hanging indent and Word does not.

**Solution:** Edit the style for footnote text to add the hanging indent paragraph format. Contact Tech Services for assistance if needed.

**Problem 3:** My footnotes sometimes end up on a different page from their reference in the text.

**Solution:** This frequently occurs with documents where double spacing is used. Double spacing is somewhat imprecise in it's measurement, and if you use an exact measurement, this frequently resolves the footnote problem.

1. Select all the text that is double-spaced.
2. From the menu bar, select format, paragraph.
3. In the line spacing area, change the spacing from double to exactly.
4. Set the measurement to 30pt. (this should be right for font that is Times New Roman 12. You may have to experiment with other fonts to get the right measurement).
5. Once the spacing is re-set, go back and check your footnotes. They will usually be positioned correctly. If this does not resolve the problem, Contact Tech Services for assistance.

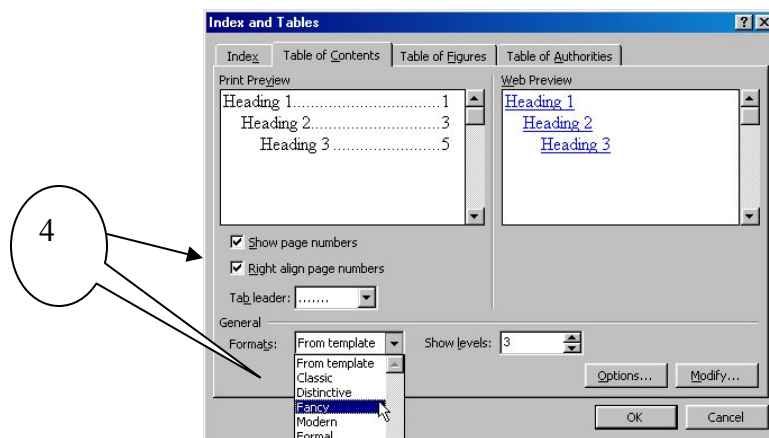


## Generating a Table of Contents

If you use Word's built in styles to create your headings, building a table of contents is easy. If you use your own custom styles, you will need to set their TOC level in the table of contents window.

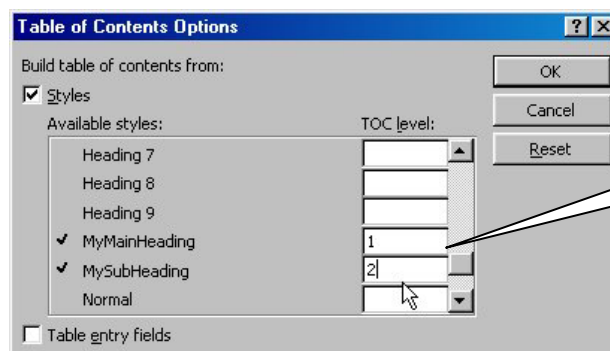
### Creating a Table of Contents with Word's built in headings

1. Use Word's built in Heading 1, Heading 2, and Heading 3 styles throughout your document for your headings.
2. Once the document is complete, move your cursor to the location you want the table of contents.
3. Select Insert Index and Tables.
4. On the table of contents tab, select the format, the number of levels, and other options you may want, and click OK.
5. Word will automatically generate the table.
6. If you make changes in the document, you should re-generate the table of contents by repeating these steps.



### Creating a Table of Contents using Styles You Created

1. Follow steps 2 and 3 above.
2. In the table of contents tab, click the options button.
3. Scroll to find your custom styles in the list of styles, and add a TOC level to the ones you wish to have in your table of contents (level 1 for the highest level, 2 for sub headings, etc.).
4. Click OK to return to the Indexes and Tables window.
5. Follow steps 4-6 above.



## ***A few favorite tips and shortcuts***

Ctrl + X	Cut
Ctrl + C	Copy
Ctrl + V	Paste
Ctrl + 2	Adds double spacing to the selected paragraph
Ctrl + 1	Single spaces the selected paragraph
Ctrl + 0	Removes or adds one line of space to the paragraph before the selected paragraph
Ctrl + spacebar	Removes all character formatting from the selected text
Ctrl + Q	Removes paragraph formatting from the selected paragraph
Ctrl + A	Highlights the entire document
Ctrl + Home	Moves the cursor to the beginning of the document
Ctrl + End	Moves the cursor to the end of the document
Home	Moves the cursor to the beginning of the line
End	Moves the cursor to the end of the line
F5	Opens Go To/Find/Replace window

**Remember to save your work regularly, and to make at least one backup copy of your document.**