

Using Microsoft Word 2003 for Your Dissertation

A University of Michigan Library Instructional Technology Workshop

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Introduction

Microsoft Word is a tool used by many to write and format dissertations, and has many features that are very useful for this process. However, to meet Rackham requirements – as well as any set by your school or department – you will need to make some modifications from the standard Word document. This document is intended to show you the tools to make the necessary modifications. While we do use some examples from Rackham to demonstrate the various tools, *you should verify your exact specifications with the appropriate office.*

Before you start typing your dissertation, you should decide on a format for your table of contents, labeling of figures, etc. Much of this is dictated by the Rackham requirements, which is covered in the Dissertation Handbook. You can download a PDF version of the handbook at:

http://www.rackham.umich.edu/student_life/publications/dissertation_handbook/

You can also obtain a copy of the Rackham Dissertation Formatting Guidelines online at:

http://www.rackham.umich.edu/downloads/oard/forms/Dissertation_Format_Guidelines.pdf

You may want to take a look at dissertations in your discipline recently earned here at UM. This will help guide you on formatting issues not covered in the Dissertation Handbook. You can find dissertations from the University of Michigan and other universities by going to <http://searchtools.lib.umich.edu>, clicking on Find Databases, and typing dissertations in the search window.

Your dissertation committee will also be a valuable resource for helping you with formatting conventions in your discipline. Ultimately, any formatting decision will need to be approved by your committee and the Rackham Office of Academic Records and Dissertations.

Another resource that may be useful to you is the Digital Dissertation Series Virtual Companion <http://www.lib.umich.edu/knc/howto/dissertation/diss.html>. This website contains information on and links to research tools and sources, archival resources, library services, funding resources, and more.

Assistance with Using Word

Knowledge Navigation Center (KNC) is located on the second floor of the Graduate Library. Call 647-5836 to make an appointment. Indicate that you need assistance using Word for your dissertation.

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Creating Your Chapter Template

With Word, you can set up a template that can then be used with all of the chapters of your dissertation. It will be well worth your time to create a template because then all your chapters will have the same settings, and you'll only have to make the changes once; therefore, it is important to do this step first and correctly. This includes:

- Setting margins
- Setting line spacing
- Modifying and applying styles for headings, paragraphs, etc.
- Saving your settings into a template

To begin creating a template, start with a regular blank Word document – any text you add will become part of the template, and display in every new document created from the template.

Setting Margins

To meet Rackham formatting specifications for the bulk of your document, the left margin of your document needs to be set at a minimum of 1.5 inches. The right, top, and bottom margins should be set at 1 inch.

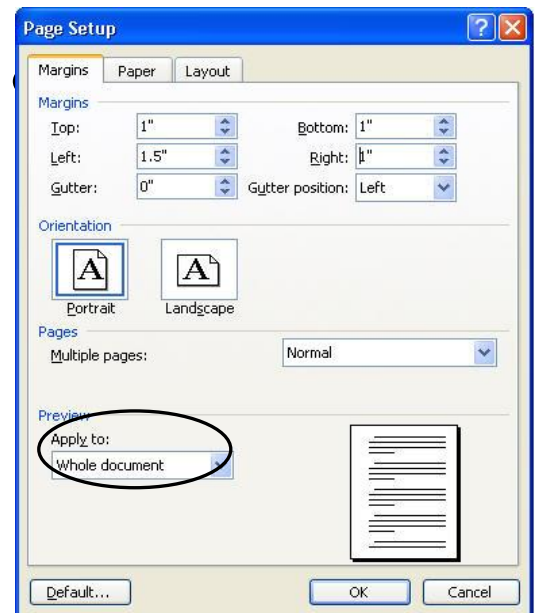
On the PC:

1. Go to the **File** menu and select **Page Setup**.
2. Select the *Margins* tab and type in the appropriate number for top, bottom, left, and right.
3. At this point, you will want to make sure the *Apply to:* pulldown in the *Preview* section says *Whole document*.

On the Mac:

1. Go to the **Format** menu and choose **Document**.
2. Select the *Margins* tab.
3. Set your left margin to 1.5 inches, set the rest of your margins to 1 inch.
4. At this point, you will want to make sure the *Apply to:* pulldown in the *Preview* section says *Whole document*.

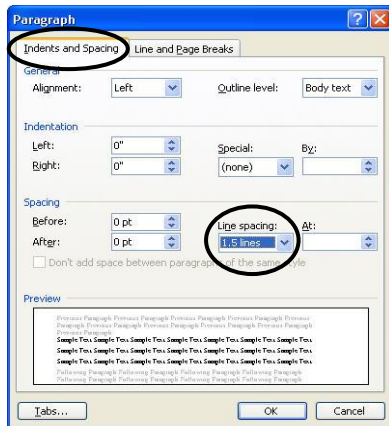
Exceptions: The title page needs to have a 2.5 inch margin at the top. Thereafter, the first page of each front matter section, as well as the first page of each chapter, needs to have a 2 inch margin at the top. See [Changing Margins in a Section](#) to learn how to do this.



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Setting Line Spacing

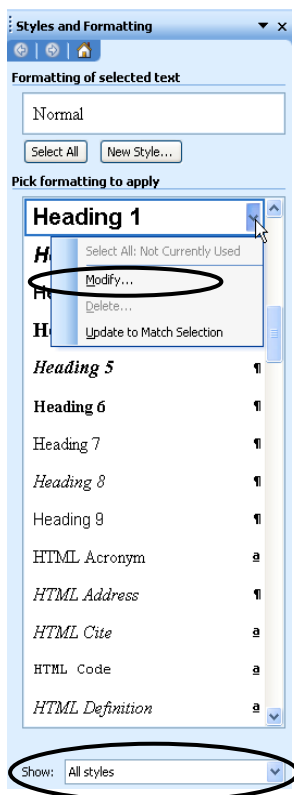


To meet Rackham formatting specifications, the line spacing needs to be set at a minimum of 1.5 inches, but no greater than 2 lines. To set the line spacing:

1. Go to the **Format** menu and choose **Paragraph**.
2. Select the *Indents and Spacing* tab.
3. From the *Line Spacing* pulldown menu, select *1.5 lines* or *Double*.

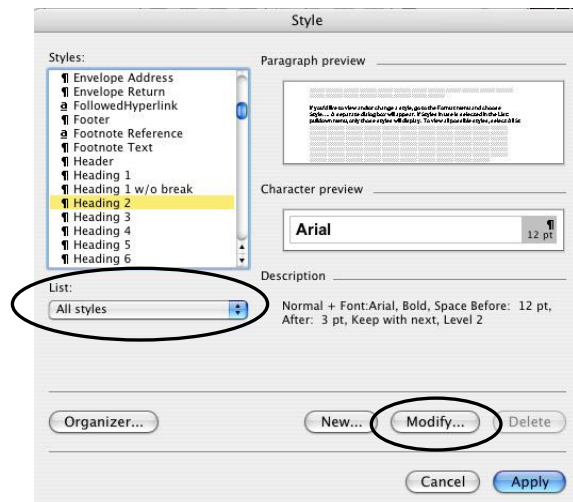
Viewing Styles

Styles define the appearance of text elements throughout your document. In particular, applying the heading styles identifies text which can be used to generate a table of contents. Styles also allow for quick changes throughout your document – if you change a heading style, for example, that heading will then be changed throughout the document.



To view and/or change a style, go to the **Format** menu and choose **Styles and Formatting (Style... on the Mac)**. The Styles Pane displays at the right of your document, or in a separate dialog box if you are on the Mac. If *Styles in use* is selected in the *Show:* pulldown menu (or *List* on the Mac), only those styles will display. To view all possible styles, select *All Styles* from the pulldown menu.

On the PC, if you hold your cursor over a style in the list, you will see information about the style such as font, size, spacing, etc. On the Mac, this information is in the *Description* area.



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exploratory@umich.edu | <http://www.lib.umich.edu/guides> | knc-info@umich.edu

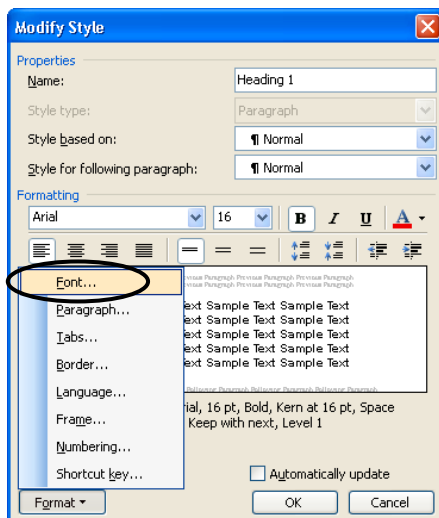
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Modifying and Creating Styles

On the PC, click on the arrow that appears to the right of the style when you hover the cursor over the name and select **Modify...** to bring up the Modify Style dialog box (see picture on previous page). On the Mac, go to the **Format** menu and choose **Style...** as above, select the style from the list, and click on the *Modify* button.



Some changes can be made right here in the *Formatting* area of the Modify Style dialog box, such as changing the font, font size, etc. For more options, click on the *Format* button and choose the correct category such as *Font...*, *Paragraph...*, etc.

As an example, if you would like the Heading 1 style to be in all capital letters, click on the *Format* button, choose *Font*, then make sure the *All Caps* checkbox is checked. When you click *OK*, you will go back to the Modify Style dialog box.

When you are done modifying a style, click *OK* to close the Modify Style dialog box. On the PC, you will now be back in your document, and you can choose a different style from the Style Pane to modify. If you're on the Mac, you will still be in the Style dialog box and you can choose a different style to modify.

In addition to heading styles, you may also want to change page number styles, captions, etc. Remember, when you modify a style, it will affect all existing text with that style and any future text in this document. You can use the Modify Style dialog box to create new styles based on existing styles. You can type anything you want into the "Name" box. You may want to create a new style for the dedication page or other front matter, etc. that needs to be in the table of contents.

Saving Your Template

Once you have all the styles set the way you want, you need to save this blank document as a document template so you can use it as a basis for future documents.

1. Go to the **File** menu and select **Save As...**
2. In the resulting dialog box, give the file a name, make sure the *Save File As Type:* is set to *Document Template*. When you change the file type, Word will automatically shift you to the correct folder for templates. (The exact location of this folder will depend on your computer and platform, but it should be in the Microsoft Word or Office folder.)
3. Close the file so you don't accidentally continue to modify the template.

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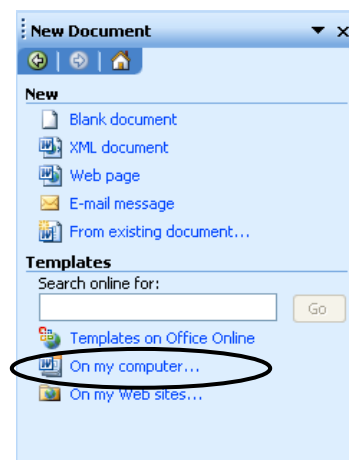
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Using and Applying Your Template

Now that you have created your template, you can either create new documents based on it or “apply” it to existing documents.

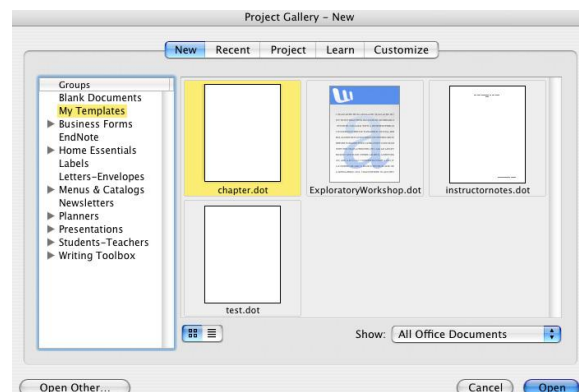
On the PC

1. Go to the **File** menu and select **New**. (Note that you must go to the **File** menu, not use the New icon on the toolbar.)
2. When the New Document Pane opens on the right side of the screen, look at the **Templates** area, and click the *On my computer....* link.
3. A Templates dialog box will open up. Choose your template and click **OK**.
4. If this is a new document, just start typing. If you already have a document to which you want to apply the template, go to **Insert** menu and select **File**. Navigate to the existing file, then click on the *Insert* button. This should apply all your new template styles to the existing document.
5. In either case, be sure to save this new document.

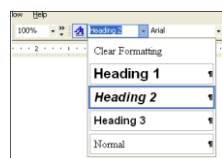


On the Mac

1. Go to the **File** menu and select **Project Gallery**. (Note that you must go to the **File** menu, not use the New icon on the toolbar.)
2. In the Project Gallery, click on **My Templates**, choose your template, and then click the *Open* button.
3. If this is a new document, just start typing. If you already have a document to which you want to apply the template, go to **Insert** menu and select **File**. Navigate to the existing file, then click on the *Insert* button. This should apply all your new template styles to the existing document.
4. In either case, be sure to save this new document.



Applying Styles



To apply the styles that you have created, such as a heading, select the text and choose the style from the *Style* pull-down in the Formatting toolbar.

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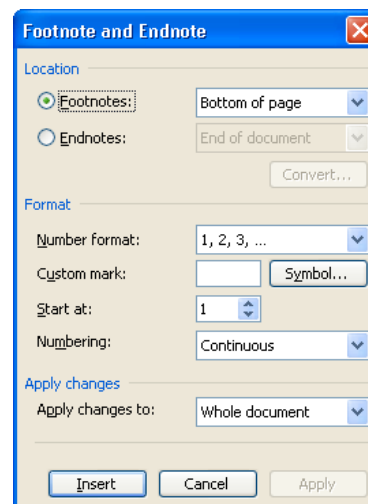
Inserting Footnotes

With Word, you can insert footnotes or endnotes as needed.

1. Place your cursor where the footnote/endnote should be.
2. Go to the **Insert** menu, choose **Reference**, then choose **Footnote** (on the Mac, choose **Footnote...** from the **Insert** menu). The Footnote and Endnote dialog box will appear.
3. Select your formatting and numbering preference as well as the location of the footnote/endnote.

Remember that you can format the style of your endnote/footnote as discussed above in the [Modifying and Creating Styles](#) section.

You may want to explore the use of EndNote or RefWorks software for bibliographic footnotes. Bibliographic software saves your references, and formats both in-text citations and works-cited lists. For more information, contact the KNC or visit <http://www.lib.umich.edu/knc/howto/citation/>.



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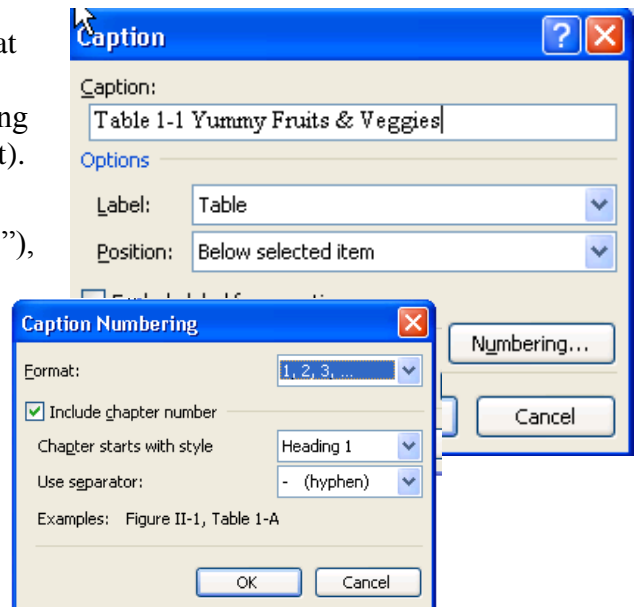
Inserting Captions

If you wish to include the chapter number in your caption (e.g. “Figure 1-2” or “Table 3.1”), you need to label all of your chapter titles and front matter headings (e.g. “Dedication” and “Acknowledgements”) in the style Heading 1. Even after this, the only way Word can tell which chapter it is in is if you consistently use the Heading 1 style for your chapter titles and explicitly tell Word that each Heading 1 is a **new** chapter. You do this by setting up Word to number your chapters automatically (see the next section if you need to do this).

Using the caption feature will ensure consistent formatting for captions, as well as the automatic generation of a table of figures, tables, etc.

To insert a caption,

1. Go to the **Insert** menu and choose **Reference**, then choose **Caption** (on the Mac, go to the **Insert** menu and choose **Caption...**).
2. In the **Caption** dialog box, select the label that applies to the object you have selected (e.g. “Figure” or “Table”) and select the positioning of the caption (e.g. above or below the object).
3. If you wish to include the chapter number in your caption (e.g. “Figure 3-2” or “Table 2.1”),
 1. Click the *Numbering...* button and check the *Include Chapter Number* box. (See the next section on how to tell Word what chapter you are in).
 2. Select the separator you wish to have between your chapter number and the caption number.
 3. Click *OK*.
4. Type your text in the *Caption:* box and click *OK*.



To change the appearance of your caption text, *do not* edit them one-by-one, but modify the style instead (as described in the [Modifying and Creating Styles](#) section on page 5).

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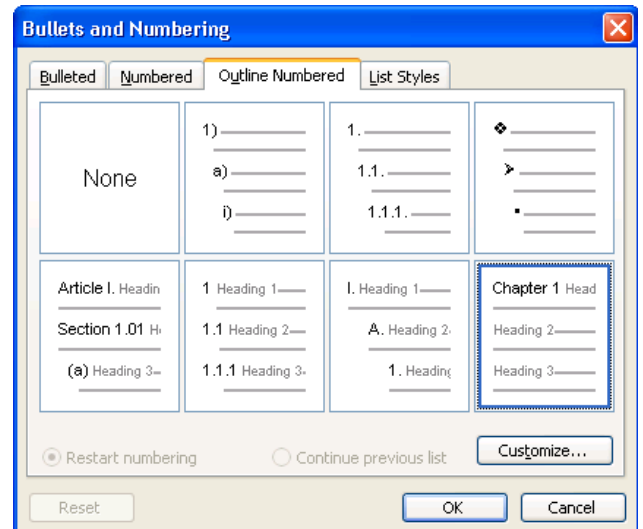
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Including Chapter Numbers in Captions

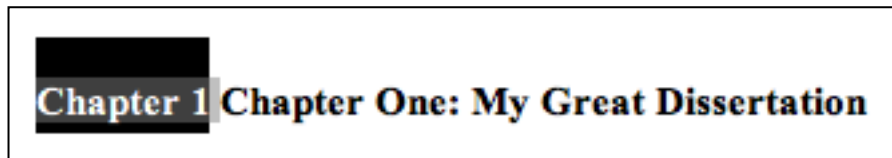
It is possible to configure Word to include the chapter number in the captions (Figure 1.2, 2.2, etc.). You can try the method outlined below, or for further assistance call the KNC at 734-647-5836 or send an email to knc-info@umich.edu to setup an appointment.

If you look at the Caption Numbering dialog box above, it identifies Heading 1 as what starts each chapter. You have your chapter titles as Heading 1s, so it should just work, right? Not so fast... You've told Word that the chapter titles are Heading 1s, it's true, but Word doesn't know which chapter *number* each one is.

1. Put your cursor on one of the Heading 1s in your document, then access the Modify Style dialog box as discussed on page [5](#).
2. Click on the *Format* button, then choose *Numbering...*
3. Click on the *Outline Numbered* tab, then choose the option that has a chapter number for each heading one (see picture at right).
4. Click *OK*.



Word has now added the words “Chapter X” to each of the Heading 1s in your document. You need to delete the text that you typed in and leave Word’s automatic insertion. You can tell which one is from Word, because it will have a gray shading to it when you click on it (see below).



You may have to update your captions – insert another one and they all should update, or select them all and then right-click on one of them to update.

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Using Non-Text Objects

Inserting Images

You may have images, figures, and/or diagrams you'd like to insert into your dissertation. Word will accept a number of image formats, including .jpg, .gif, .tiff, .eps, .emf, and .bmp. For dissertation use, .jpps or .tiffs of 200-600 dpi are best for photographic or scanned images.

To insert an image, go to the **Insert** menu and choose **Picture**, then choose **From File**. Navigate to the file, highlight the file name and click on *Insert*. It is also possible to insert an image by cutting and pasting from some other application. We do not recommend this method, since you may not be getting the highest-quality image when you copy and paste.

Other objects you might wish to insert could include text boxes, charts and graphs (more follows about using Excel charts), figures and diagrams, and data tables. The following formatting options should apply to all such objects. Note that Rackham does not allow text wrapping around images, tables, figures, etc.

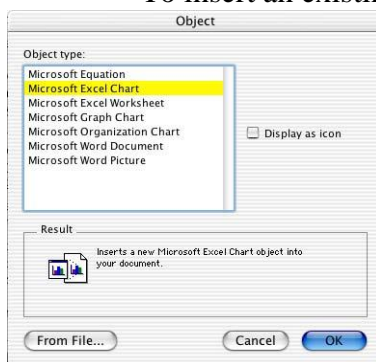
Inserting a Chart from Excel

Because the Microsoft products work well together, you can copy an Excel chart and paste into your Word document or insert it as an object. Once the chart is in Word, anything about the chart can be changed as described in our "Getting Started with Excel" handout (go to <http://www.lib.umich.edu/guides> and search for Excel). In addition, if you already have a chart created in Excel, you can either embed it in or link it to your Word document.

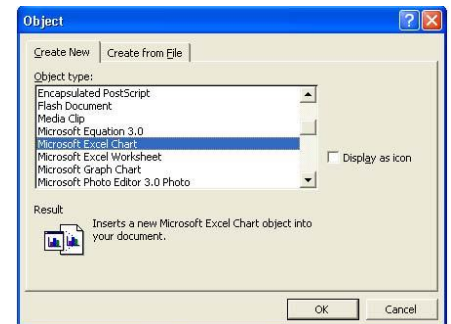
Sometimes colors from your charts may not be reproduced exactly when charts are inserted in a Word document. However, if you copy and past from Excel, the colors will be reproduced properly.

To insert the chart, go to the **Insert** menu and select **Object...** You'll have several options to choose from, including inserting a new Microsoft Excel Chart or Microsoft Graph Chart, or choosing an existing file. If you choose to create a new chart, both the Excel and Graph options display a sample chart that can be edited.

To insert an existing file:



1. Choose the correct type.
2. Click on the *Create from File* tab (or the *From File...* button on the Mac).
3. Click on the *Browse* button (PC) to select your file (on the Mac, navigate to the correct file in the Insert as Object dialog box). At this point, you can choose to embed your chart, or link to the chart in Excel.
4. Once you've chosen, click *OK*.



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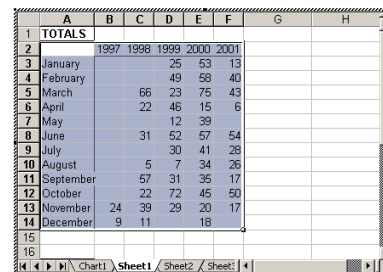
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Embedding a Chart

When using either the direct copy method or the Insert Object method described above, you actually are embedding the chart in your Word document. **Embedding** a chart stores the information directly in the document, so if you change your chart in any way, these changes will affect only the chart copied/created in the Word document, **not** your Excel file.



	A	B	C	D	E	F	G	H
1	TOTALS							
2	January	1997	1998	1999	2000	2001		
3	February		25	53	13			
4	March		49	58	40			
5	April		66	23	75	43		
6	May		22	46	15	6		
7	June			12	39			
8	July		31	52	57	54		
9	August			30	41	28		
10	September		5	7	34	25		
11	October		57	31	35	17		
12	November		22	72	45	50		
13	December		24	39	29	20	17	
14			9	11	18			
15								
16								

When you insert a chart as an object, Word actually inserts the entire workbook into your document. Note that this can significantly increase the file size of the Word document. However, with an embedded chart, you can display any of the worksheets that comprise the Excel file, with the restriction that you can display only one at a time. To access the other sheets, double-click on your chart, and click on the appropriate sheet.

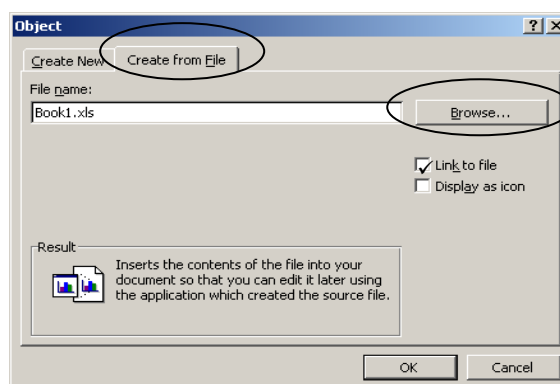
Linking a Chart

Linking leaves the chart data in the original Excel document, so it will not increase the file size of your Word document a great deal. This option is very useful when the information in your Excel document is updated constantly and you want those changes to be reflected in your Word document. If the files are linked, double-clicking on the chart in Word will launch Excel, and you can edit your chart. Any saved changes will reflect in both documents. Note that if you move either of the linked files (say, to a disk, or to a new folder), you may break the link between them. In this case, the Word-version will reflect the data as it was immediately before the file was moved.

Both the methods below will create a linked chart in your Word document.

Linking as you Insert a File


To link the Excel file to the Word document as you insert the chart, go to the **Insert** menu and select **Object...** choose the correct type, then select the *Create from file* tab. Make sure the *Link to file* checkbox is selected, then browse to your file as you did when you embedded it. Make certain that your Excel workbook is open to the correct sheet to be linked.

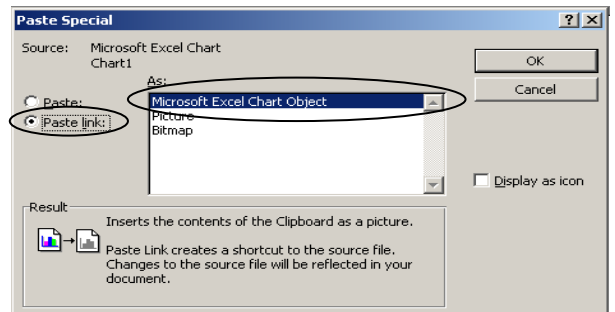


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Using the Paste Special... Command

1. Open both your Word document and the Excel document containing the chart to link. In Excel, select the chart that you want to copy, go to the **Edit** menu and click on **Copy** (or click on the copy icon  in the toolbar).
2. Switch to your Word document, go to the **Edit** menu, and select **Paste Special...**
3. In the Paste Special dialog box, select the **Paste link** option. Select *Microsoft Excel Chart Object* in the *As* box.
4. Click *OK*.
5. After inserting, you might need to resize your chart.
6. Edit your chart like any other chart by double-clicking on it.

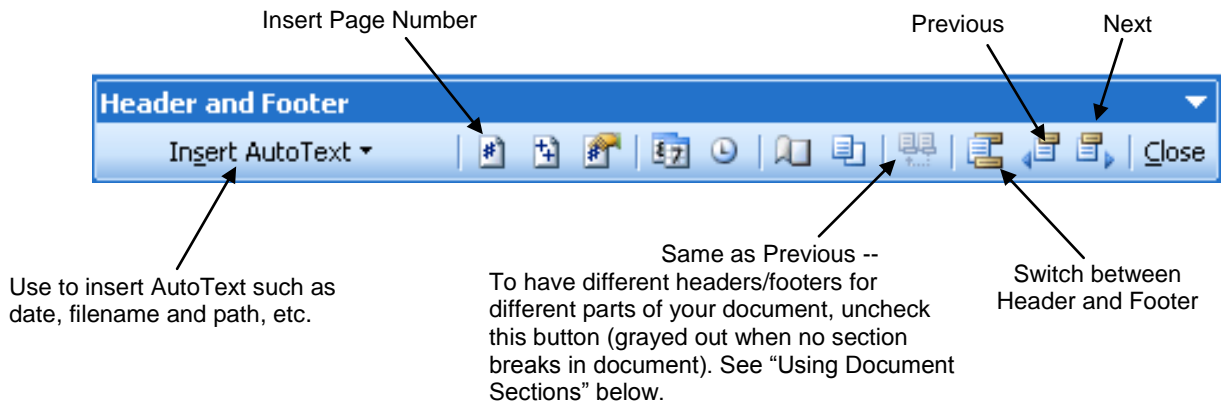


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Working with Headers and Footers

Once the margins and sections are set, you are ready to add the headers and /or footers. Go to the **View** menu and choose **Header and Footer**. Your view will automatically change to the **Page Layout View** (if you're not already there), and you will see dashed lines around the header and footer area, and the Header and Footer toolbar will automatically appear. With this toolbar, you can add page numbers, dates, and so forth, as well as view the next or

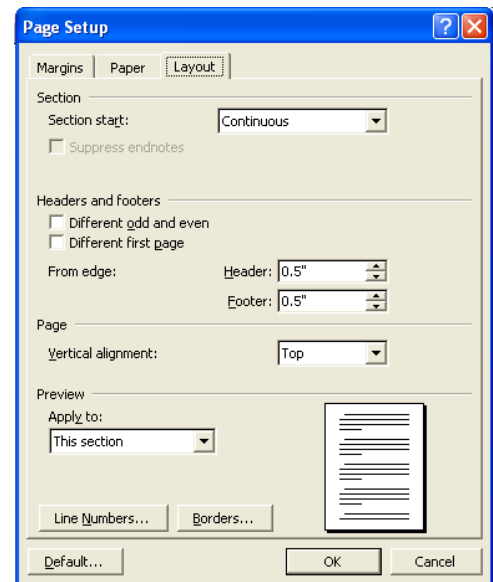


previous header or footer, switch between header and footer, etc. Click your mouse where you want to insert text, and either start typing or click the appropriate item on the toolbar (such as page number).

Setting Header Options

You can change certain settings for only the first page – either of your whole document or of a particular section. For example, you may not want a page number to appear on the first page. In addition, you may want different headers on the odd and even pages. If you need to work with sections, please refer to the "Using Document Sections" portion of this handout.

1. Click on the **File** menu and choose **Page Setup...** (on the Mac, go to the **Format** menu and choose **Document...**).
2. In the Page Setup dialog box (Document dialog box on the Mac), choose the *Layout* tab.
3. Check the *Different first page* checkbox to have a different header for the first page of a section. Now you can format the first page header to meet your requirements.
4. If desired, while still in the Page Setup dialog box, you can also check the *Different odd and even* checkbox. This allows you to create a different header for the odd and even pages, such as the chapter number on one



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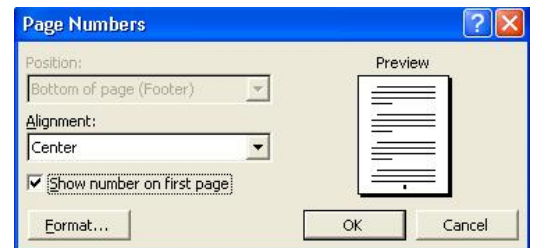
and the chapter title on the other, as well as align the page numbers correctly.


5. Make sure you've chosen the appropriate item in the *Apply to:* menu – if you are working in a particular section, be sure the pulldown menu says *This Section*.
6. Click *OK* to exit the dialog box.

Inserting and Formatting Page Numbers

It is recommended that you let Word automatically assign page numbers to your document. You will have to go back and adjust the pagination to meet Rackham formatting specifications, but it is best to do this as one of the very last steps. To let Word automatically assign page numbers:

1. Go to the **View** menu and select **Header and Footer**.
2. Place your cursor in the footer area, go the **Insert** menu and select **Page Numbers**.
3. Using the *Alignment* pulldown menu, indicate if you want the page number to be centered or otherwise, and if you want a page number on the first page or not.
4. Click *OK* to close the dialog box.



If you need to change the page number format, you can click on that icon in the Header and Footer toolbar (). This may be particularly important if you want different types of page numbers in different sections, such as Roman numerals in the Front Matter. Again, please refer to “Using Document Sections” in this handout for more information about sections.

Once you click *OK*, you should return to the Header/Footer area of the page you were on. If you would like to add text, go ahead and type it in and align as you need. Go to the next page (odd or even, depending on what you started on) and add more text (and align it) if desired.

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Putting It All Together

While working on their dissertations, many users choose to maintain separate Word documents for each chapter. It helps keep file size manageable, and makes it easy to share chapters for comments and feedback. However, to meet Rackham specifications, you'll have to eventually produce a single stack of paper containing all chapters, front matter, appendices, etc. There are two options for this.

Combining the Chapters

For most people, it is easiest to combine all chapters into one Word file. They then create dissertation front matter such as the frontispiece, copyright, dedication, acknowledgements, and preface, as well as add the table of contents, list of figures, and any appendices to the larger file. The advantages of this approach are that Word will easily generate consecutive page numbers for you, and you can use Word's outlining tools to generate automatic tables of contents, list of figures, list of tables, etc., for the entire document.

When you are ready to combine chapters of your dissertation, insert the chapters as a file rather than cutting and pasting text from one document to another. This will ensure that all formatting is applied properly in the combined document. To combine chapters:

1. Open chapter one and place the cursor at the end of the file.
2. Go to **Insert** menu and select **File**.
3. Navigate to the file you want to insert and click on the *Insert* button.
4. Repeat as necessary for each chapter.

Maintaining Separate Files

Some people choose to maintain several separate files even through the final printing of their dissertations. There are several reasons why this might make more sense. Most frequently, writers have created their chapters as different documents without using a unified Style setup and template – when the chapters are combined, the formatting goes haywire. At that point, it is easier to maintain the separate documents.

You might choose to maintain separate files if you are using bibliographic software and need to produce separate lists of references for each chapter. You might also find that combining your chapter files produces a file so massive that opening, editing, and saving it is prohibitively slow.

If you choose not to combine files, you will have a bit more formatting work to do, particularly as regards page numbering, and generating tables of contents, figures, etc. Read on for more information.

Using Microsoft Word 2003 for Your Dissertation

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Using Document Sections

You can use **sections** to indicate parts of your document that should look different from other parts. A section may be a single page, a range of pages, or a whole chapter.

Inserting a Section Break

There are a few different kinds of section breaks that you can add, but all are added in the same way. First, click your mouse in the document where you want the section break to be. Now go to the **Insert** menu, choose **Break...** In the *Section Break* area choose the appropriate option and click *OK*.

- Use an **Odd page** or **Even page** section break if the page numbers aren't lining up as you'd like (the new page will be blank, no headers or footers).
- Choose **Continuous** If you don't want a new page for your section (this will also continue the running head).
- Select **Next page** if you want a new page.

Breaking the Connection Between Sections

By default, the headers and footers of each section are connected to those of the sections before and after it. Page numbers appear in the header or footer of the page, so if you want page number styles to differ from one section to the next (such as Roman or Arabic), you'll need to break the connection between the sections.

Make sure you have inserted page numbers throughout your document before you break the connections, or you will have to separately insert page numbers in each section where you've broken the connections (see the previous section if you are not sure how to add page numbers).

1. Go to the **View** menu and select **Header and Footer**.
2. In the Header and Footer toolbar, click on the *Same as Previous* button so it is not selected.



3. Use the *Header/Footer* button (to the right of the *Same as Previous* button) to switch between header and footer view if necessary.
4. Use the *Next Section* button (just to the left of the *Close* button) to move to the next section, and repeat this process for each section as needed
5. When finished, click on the *Close* button in the Header and Footer toolbar or leave it open to change the page number as described on the next page.

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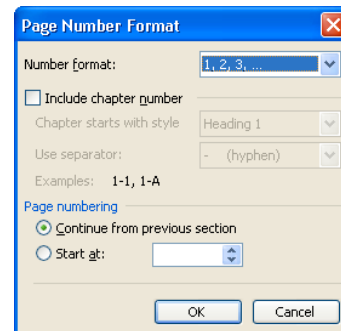
Changing Page Numbers in a Section

Sometimes you will want to change page numbers for a section such as showing Roman numerals instead of Arabic, or making the number disappear or appear in a different location on the first page of a chapter.

Make sure that you have inserted page numbers throughout your document, and then broken the connection between the separate sections before you start trying to format page numbers.

To change the page number format,

1. Go to the **View** menu and select **Header and Footer**.
2. Click on the *Format Page Number* icon () in the **Header and Footer** toolbar. The **Page Number Format** dialog box will appear.
 - Under the *Number Format*: pulldown menu, select the desired style of number.
 - You can also indicate in the *Page Numbering* section of the menu what number you want to begin with other than “1”.



To make the page numbers invisible on the first page of a section, first delete the page numbers for that section then insert them again by going to the **Insert** menu and select **Page Number**. In the dialog box, **uncheck** the *Show number on first page box*.

Go to the next section and check that your page numbers are correct for your chapters, and adjust as needed.

Changing Margins in a Section

Changing the margins for a section is just as described in “Setting Margins” on page 3, above. However, you will want to make sure the *Apply to:* pulldown in the *Preview* section says *This Section*, instead of *Whole Document*.

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Special Circumstances for First Pages of Chapters (Using Styles)

If you are using styles, and you have set all of your chapter titles to be in a specific style (e.g., all your chapter titles are formatted using the **Heading 1** style), then you can modify that style to include 1 *extra* inch of space in addition to the 1 inch included in the top margin of the page.

In the Modify Style dialog box, click on the **Format** menu and select **Paragraph...** In the following dialog box, find the *Spacing* section, and type 1” into the *Before* field. This will add 1 extra inch of spacing before each of your chapter titles.

For more information on using styles, see the [Modifying and Creating Styles](#) section of this handout.

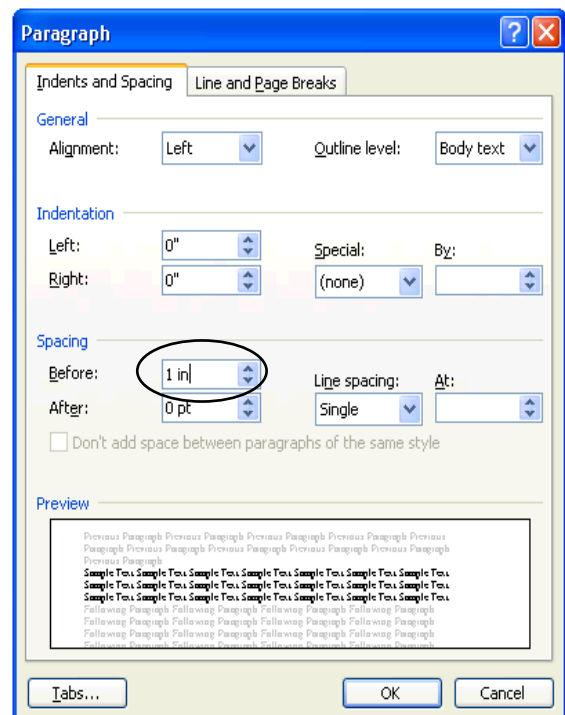


Special Circumstances for First Pages of Chapters (Without Using Styles)

By Rackham standards, the first page of each chapter has to have a 2 inch top margin, while the rest of the chapter has a 1 inch top margin. In addition, you may need to have the page number in a different position on the first page of the chapters.

If you have **not** used **styles** in your document (see p. 5 of this handout), then follow these instructions.

1. Select the chapter heading or chapter title on the first page of the chapter.
2. Go to the **Format** menu, and select **Paragraph...**
3. In the dialog box, change the Spacing: *Before*: to **1 in**. This one inch of space before your chapter heading font, combined with the normal 1 inch margin will give you two inches of space.
4. Use this method for each one of your chapter titles, or anywhere else in the document where it is necessary to have two inches of space before the text.



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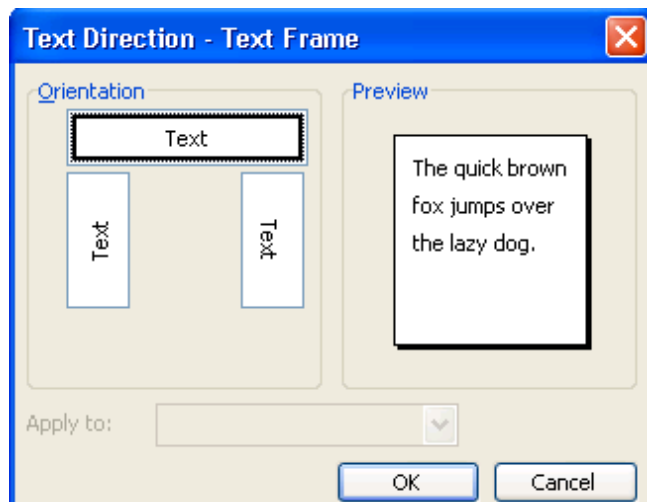
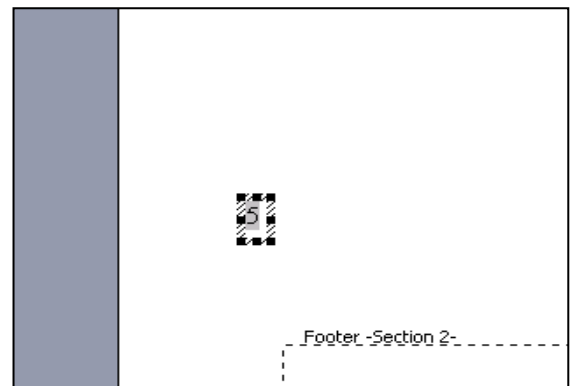
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Working with Landscape Pages in a Portrait Document

In some cases, you might need pages with a landscape orientation in your dissertation. You must first add section breaks before and after the page(s) that you want to appear landscape. Then go to **File**, choose **Page Setup...** and in the *Margins* tab, choose *Landscape* as your *Orientation*.

You'll also need to change the location and orientation of the page number on your landscape pages. Make sure you break the connection between the landscape section and the sections before and after (as described above).

1. Once you have isolated the landscape page(s), return to the first landscaped page and highlight the page number on this page.
2. A text box should appear around the number, which you can then drag to the correct position on your page (even outside of the header/footer area), using the rulers to position the box in the center of the page.
3. Click on the text box, go to the **Format** menu and choose **Text Direction**. Choose the appropriate orientation and then click *OK*.



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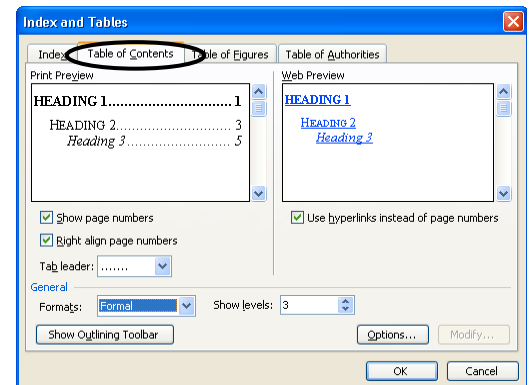
Table of Contents, Tables of Figures, and Appendices

Generating Tables Automatically

Word will search for headings with the specified styles, sort them by heading level, reference their page numbers, and display the table of contents in the document.

To add a table of contents,

1. Position your cursor where you want the table of contents to be inserted (you will have to add the text “Table of Contents” if you want it to appear).
2. Go to the **Insert** menu, choose **Reference** and then select **Index and Tables** (on the Mac, choose **Index and Tables...** from the **Insert** menu).
3. Click on the *Table of Contents* tab.
4. Select the format you want for the table of contents. Use the *Options...* button to customize the table of contents, such as how many heading levels you would like to appear or if you want to include additional styles.
5. Click *OK* when you’ve finished.



To create a **Table of Figures** or **Tables**, use the **Insert** menu again, but this time select the *Table of Figures* tab and repeat the process. A table of figures will be generated from the captions you inserted. You can generate a table for each label (Tables, Figures, etc.) you have. **Note:** *You can regenerate tables at any time. Just use the **Insert** menu to reinsert – you will then be prompted to write over the old table of contents. Another option is to right-click on the table of contents and choose **Update Field** from the shortcut menu (Control and click on the Mac).*

Generating Tables Manually

If you do not unify your document into one large file, or if the automatic tables do not work for your purposes, you may wish to generate your tables by hand. Don’t try to enter the label, hand-type dots or dashes, and haphazardly align your page numbers. Instead:

1. Type in a label, then move your cursor to the right on that same line until you see the **Align Right** text cursor (¶). Double-click to right-align, and enter the page number.
2. Highlight the lines you have created, then go to **Format** and choose **Tabs...** then, under the *Leader* section, choose dots or dashes as you prefer. This will automatically insert dots or dashes between your label, and the page number.

Here’s your label..... and your page number!

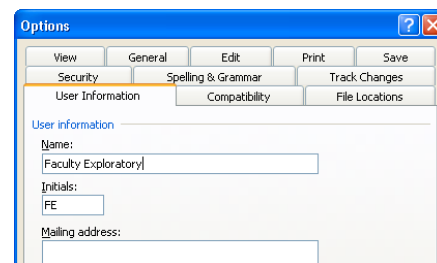
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Using the Comments Feature

Preparing a Document for Review

Before you make any changes to your document, you should check the user information to make sure your name and initials appear. This is particularly important if you work in a computer lab or on a shared machine in your office. This information is set when Word was installed, so it doesn't hurt to check and make sure it appears as you wish.

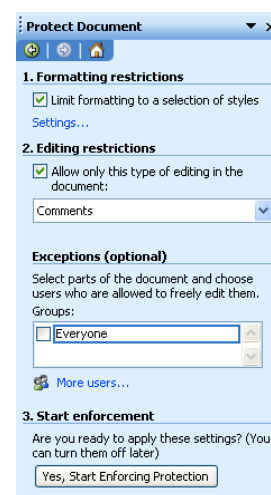


To set your name and initials, go to the **Tools** menu, and select **Options** (on the Mac, go to the **Microsoft Word** menu and choose **Preferences**). Click on the *User Information* tab to change your name and/or initials. Click *OK* when you are finished.

Protecting Your Document

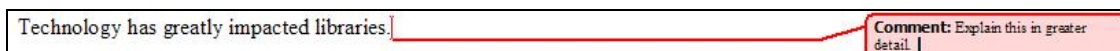
If you want to keep your original document intact, but allow others to add comments, you should protect your document before you send it. To protect a document:

1. Go to the **Tools** menu, and choose **Protect Document**.
2. Check the *Limit formatting to a selection of styles* box (PC only).
3. In the *Editing Restrictions* section (*Protect document for on the Mac*), change the pulldown menu to *Comments*.
4. Finally, click the *Yes, Start Enforcing Protection* button to protect your document (*OK* on the Mac). Now that your file is protected, you can insert a comment (or send it to someone else for him/her to review and edit).



Inserting Comments

To insert a comment, place your cursor where you'd like to make a comment. Go to the **Insert** menu and choose **Comment**. Type your comment in the comment bubble that appears at the right of your document (if balloons are on), or in the footnote area (if balloons aren't on).



In the document, if you hold your mouse over the yellow highlight, and your comment will appear. You can also view your comments at any time by going to the **View** menu and selecting **Markup**.

For more information about using comments and tracked changes, see our "Beyond Copy, Cut and Paste" handout (<http://www.lib.umich.edu/guides>).