

Microsoft® Word
2007
Formatting a Report

Elizabeth Wells

October 2011

Microsoft Word 2007 Formatting A Report

Copyright © 2011 Elizabeth Wells

All rights reserved. Except as permitted under current legislation, no part of this work may be photocopied, stored in a retrieval system, published, adapted, transmitted, recorded or reproduced in any form or by any means, without the prior permission of the copyright owner.

Microsoft Word is a registered trademark of Microsoft Corporation.

Contents

Lesson 1: Introduction to Outlining	5
Changing view.....	5
To promote the level.....	5
To demote the level.....	5
To promote straight to the 1 st level.....	5
To return to normal, or body text.....	5
Lesson 2: Collapsing and Expanding Headings and Text	6
Collapsing Headings.....	6
Expanding Headings.....	6
Collapsing/Expanding text.....	6
Lesson 3: Re-Arranging the Outline	6
Using arrows.....	6
Using symbols.....	6
Lesson 4: Using Automatic Heading numbering	7
Adding heading numbering.....	7
Removing heading numbering.....	7
Lesson 5: Changing the Heading Numbering Style	8
Lesson 6: Automatic Table of Contents Using Standard Heading Styles	10
Simplest Method.....	10
With more control over the layout.....	10
Lesson 7: Removing a Table of Contents	11
2007 format or later.....	11
Document format earlier than 2007.....	11
Lesson 8: Updating a Table of Contents	11
Lesson 9: Automatic Table of Contents Using Non Standard Styles	12
Changing styles used.....	12
Returning the settings back to normal.....	12
Lesson 10: Footnotes/Endnotes	13
Definition.....	13
Inserting footnotes.....	13
Inserting Endnotes.....	13
Returning to the text.....	13
Deleting Footnotes.....	13
Moving footnotes.....	14
Lesson 11: Reviewing footnotes/Endnotes	14
Lesson 12: Using footnotes or endnotes with symbols	14
Lesson 13: Altering Footnote/Endnote Options	15
Footnotes.....	15
Endnotes.....	15
Converting Footnotes to endnotes and vice versa.....	15

Microsoft Word 2007 Formatting A Report


Lesson 14: Marking Index Entries	16
To mark Index entries	16
Editing index entries	16
Deleting an Index entry	16
Lesson 15: Inserting an Index.....	17
Updating the index	17
Deleting the Index	17
Using a colon in the Index	17
Lesson 16: Correcting sorting issues	18
Unexpected sorts	18
Controlling sorts.....	18
Lesson 17: Creating more than one index.....	18
Editing Index Entry fields	18
Creating a named Index	18
Method 1	18
Method 2	19
Lesson 18: Adding Captions to Tables and Figures	19
Adding captions	19
Updating the numbering	19
Lesson 19: Creating Tables of Charts, Tables and Figures.....	20
Inserting the index	20
Updating the index	20
Updating Fields	20
Updating fields automatically	20
Lesson 20: Using Cross references	21
Inserting Cross References	21
Lesson 21: Bookmarks.....	22
Creating a bookmark	22
Using a bookmark in a Cross reference	22
Using a bookmark to get to a position in the document quickly	22
Lesson 22: Borders.....	23
Simple bordering of text	23
More detailed bordering options	23
What exactly am I bordering?.....	23
Bordering a table	23
Bordering a cell	24
Lesson 23: Protecting the Document.....	24
Protecting the document	24
Lesson 24: Accepting/Rejecting Track Changes.....	25
Unprotecting the document	25
Controlling how tracked changes are shown on screen	25
Accepting /Rejecting revisions individually	25
To see changes by specific reviewers	25

NOTE: If your document is saved as .doc (97-2003) then the dialogue boxes and commands may be different from those described here as they may be those used in Word 2003

Lesson 1: Introduction to Outlining

Outlining is a way of organising your document easily. You need to be in the **Outline** View

Changing view

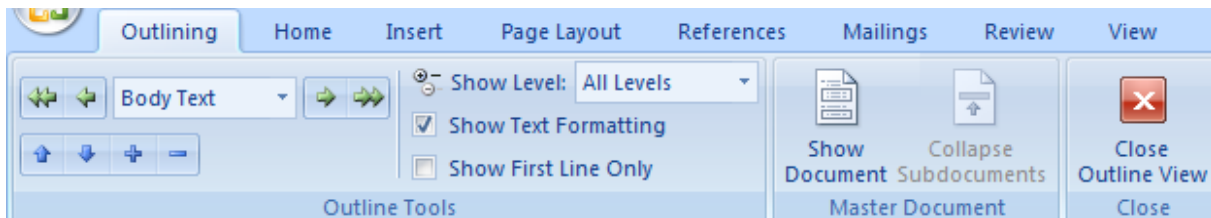
Select **Outline** from the **View** ribbon, or click on the  button at the bottom right of the window.

You will now see the text take on a different appearance. A small square will appear at the left of

- **GETTING STARTED**

every line. e.g. ● **Gaining Control**






A new ribbon tab appears, called **Outlining**





Use these new tools to organise your report into levels. The initial '●' demonstrates that what you have typed is at the *body text* level. (i.e. it will be formatted using the *Normal* style.

You can alter this by using the  and  buttons as explained below.


To promote the level

Click on the  button, or press the **Shift Tab** keys, to raise the text to *Heading 1* (i.e. it will be formatted using the style *Heading 1*). The initial symbol will change to  or  and one of these symbols will be shown at the beginning of any heading. There are nine heading levels. ( means the heading has no text or subheadings beneath it.  means that there is text and/or subheadings)



Note

1. If the text is already at a heading level clicking  (or **Shift Tab**) will raise the text to a higher level.
2. If the text has no heading level clicking  (or **Shift Tab**) will raise the text to the same heading level as the previous heading.

To demote the level

To change a heading to a lower level click on the  button, or press the **Tab** key, until the required level is reached.

Note

1. If text is already at a heading level clicking  (or **Tab**) will lower the text to the next level.
2. If the text has no heading level clicking  (or **Tab**) will lower the text to the heading below that of the previous heading.



To promote straight to the 1st level

Click on the  button

To return to normal, or body text

Click on the  button.

Lesson 2: Collapsing and Expanding Headings and Text



Note: Where lower level headings and/or text exist beneath a heading that heading will have the  symbol to the left. Where there is no lower heading or text the heading will have the  symbol to the left

Collapsing Headings

You may wish to view the headings only. This would enable you to see the ‘bones’ of the document. First consider exactly what you would like to see.



Click the down arrow for .

To see only level 1 headings choose **Level 1**. To see level 1 **and** 2 headings select **Level 2** and so on. These buttons will show you **all** the headings of the relevant levels and no other text.


You can also to collapse headings below a particular heading, one level at a time, and only that heading. Place your cursor on the relevant heading and click the  button on the toolbar until only the desired levels are showing (or double click the  symbol at the left of the heading)

Expanding Headings

If you are viewing certain headings only click select **Show All Levels** to see all headings and text.

To expand headings one level at a time make sure your cursor is on the relevant heading and click the  button on the toolbar (or double click on the  symbol at the left of the heading)

Collapsing/Expanding text



If you are not particularly interested in viewing all the text below the headings click on the  button to show only the first line of such text. Click again to raise the button and show all text

Lesson 3: Re-Arranging the Outline




You can rearrange headings and text using one of the following methods


Using arrows

You can use this method to move individual headings or pieces of text. If you wish to move the whole section, including lower headings, text etc then you must highlight all that you wish to move.

Click on the text to be moved and click on the  button to move it up through the outline or the  button to move it down.

Using symbols

Move over the  **or**  symbol at the left of the heading you wish to move. When the cursor changes to  click. Note that all lower headings and text are automatically highlighted. Hold the left mouse button down and drag the text to its new position. While you are holding the mouse button down you will see a horizontal line. Make sure this line is in the position in which you wish to see the text you are moving before you release the mouse button.

Click on the  symbol to the left of the text to move text only

Lesson 4: Using Automatic Heading numbering


Adding heading numbering

Word will allow you to number headings automatically when you have set them up using the standard heading styles as when using Outline. (but you no longer need to be in Outline view when setting up the numbering)

Level 2 Headings will be numbered within Level 1 Headings. So numbering restarts each time there is a new Level 1 Heading.

When you move headings they are automatically renumbered.

First, click on the first Level 1 heading – formatted with whatever style you are using for Level 1


On the **Home** ribbon, click  (the third numbering option in the **Paragraph** group).

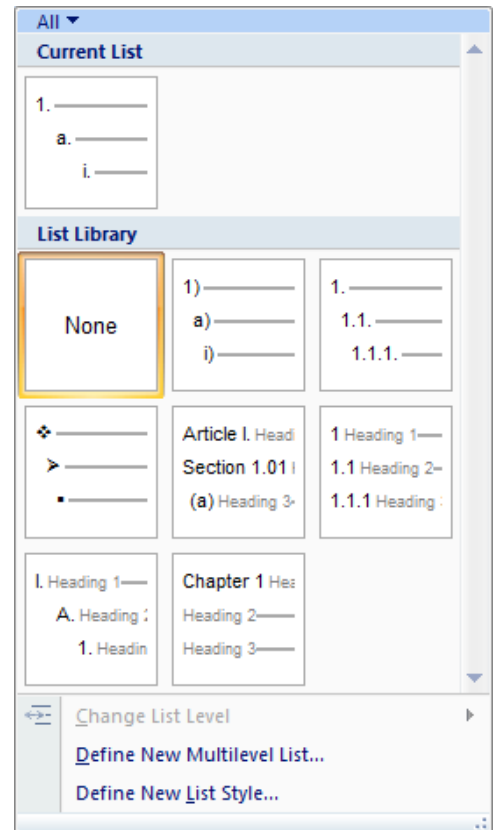
You can now select the type of numbering you require – make sure it is one that shows the *Heading* levels. (The last 4 as shown right)

If you choose the Chapter option then the “numbering” will only apply to first level headings.

Removing heading numbering

Note: You will remove all heading numbering throughout the document

Highlight your text, (**Ctrl A**) select **Home**,  and click on



Lesson 5: Changing the Heading Numbering Style

If you do not like any of the heading styles select **Home**, , and click **Define New Multi-level List**

Click the **More** button to see all options

Click Level to modify: The level of heading which you are changing is highlighted in the list on the left. Make sure that you click on the level you wish to alter

Link Level to Style

Make sure that each level is linked to the style for that level e.g Level 1 is linked to Heading 1, Level 2 is linked to Heading 2 and so on.

ListNum field list name:

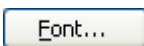
It is useful to name your list so you can reuse it.

Number Format:

Enter formatting for number: this allows you to add any characters before or after the number

Number Style: select the *kind* of number which you wish to use. E.g. 1,2,3 or a,b,c or i,ii,iii

Start at: If the document is part of a larger report you can define an alternative start number.

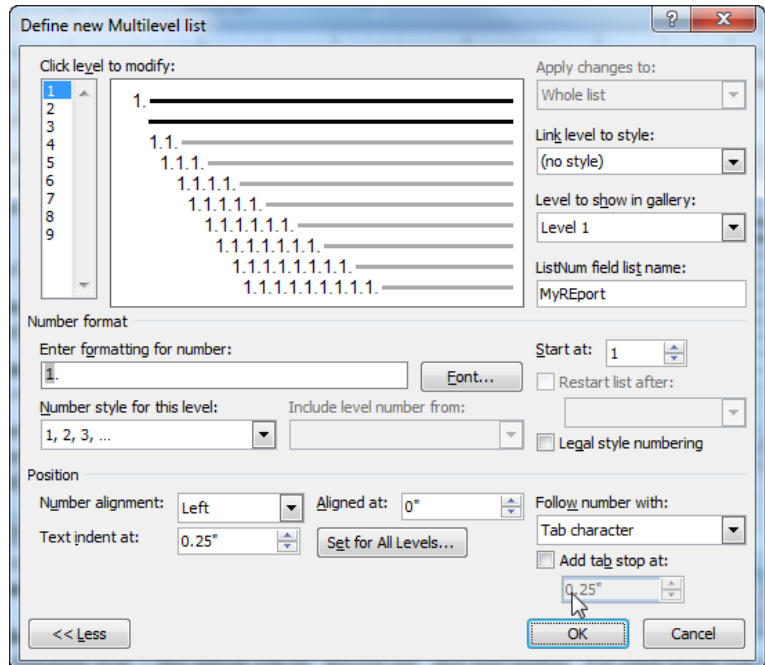
 Click to change the font style and size of the numbering and any text in the **Enter formatting for number** field

Include level number from: Note that if you are changing *level 1* this option will be “greyed out” and unavailable. For other levels you can carry the number of the previous level down to the current one so that you get situations like 2. and 2.1. where 2. is the number of the first-level heading and the 2. from this level has been carried down to form part of the first second-level heading. To include a number from a previous level make sure that you have first placed your cursor in the **Number format** box in the correct position.

e.g In the example shown right, the first number, before the dot, of the second level headings is *included from* the level above.

- 1 Rabbit
 - 1.1 Living Quarters
 - 1.2 Food
- 2 Dog
 - 2.1 Exercise
 - 2.2 Food

Note that if you clear the **Enter formatting for number** field, and wish to set up this kind of numbering again for, say level 3, you would need to select Level 1 from the drop down box, then type a dot in the **Enter formatting for number** field as a separator, then select Level 2 from the drop down box, then type another dot in the **Enter formatting for number** and then select level 3 from the drop down box. Note that automatic numbers are shown in highlighted in grey (You cannot just type the numbers!!)



Microsoft Word 2007 Formatting A Report

Start at: If you are doing a large document and have sections in different files you can use this to start the numbering where another file finishes (not ideal as you may have to keep updating it!)

Restart List after: Note that this is not available for the 1st level. In the example shown right Level 2 is restarted after level 1, and Level 3 is also restarted after level 1. You can see how we get 1.2.3 rather than 1.2.1.

1. GETTING STARTED

1.1. Gaining Control

1.1.1 Gaining Control of Yourself

1.1.2 Gaining Control of your Topic

1.2. Consider your writing style

1.2.3 Who are your audience?

Legal style numbering This automatically changes the numbering style used to Arabic (1,2,3)

Position

Number alignment: This defines the position of the number in the space before the text. There are three options.

left will place the number at the left margin, e.g. 1 Rabbit

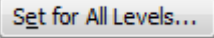
centered puts it half way between the margin and the text 1 Rabbit

right in theory puts it up against the text, but in practice is no different from *centered*

Aligned at: defines the distance from the left margin to the number

Text indent at: Defines the distance from the margin the first character of the second and continuing lines of the paragraph.

Follow number with. This defines what comes between the number and any text following.

To set indents for all levels click  and define the settings.

Position

Number alignment: Left

Aligned at: 0"

Follow number with: Space

Text indent at: 0"

Add tab stop at: 0"

Lesson 6: Automatic Table of Contents Using Standard Heading Styles

If you have already set the document up using the outline view, or by applying the standard Heading styles (Heading 1, Heading 2 etc) to the headings, this is a very easy process.

Simplest Method

1. First make sure your text cursor is placed in the position you want to insert the Table of Contents
2. Click the **References** ribbon and then the **Table of Contents** icon (at the left)
3. You can then select one of the layouts from the list by clicking on it.

With more control over the layout

1. First make sure your text cursor is placed in the position you want to insert the Table of Contents
2. Click the **References** ribbon and then the **Table of Contents** icon (at the left)
3. Click **Insert Table of Contents** at the bottom of the list.

Select the look of the Table of Contents by clicking on a name in the **Formats** option. The format style will be demonstrated in the **Print Preview** box.

Use the **Show page numbers** box to define whether page numbers will be shown or not

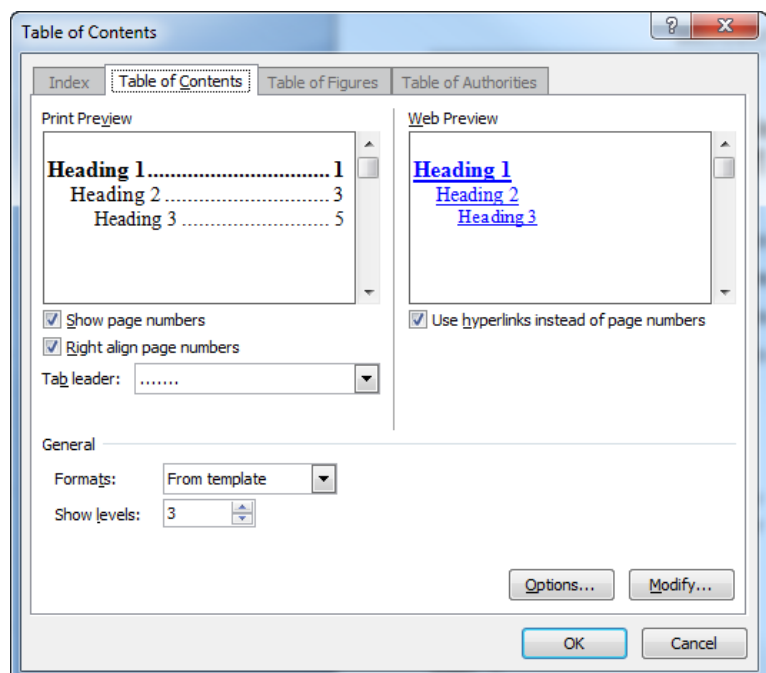
If **Right align page numbers** is ticked then the numbers will be shown in a vertical column at the right hand side of the page.

If **Right align page numbers** is not ticked the number will be shown immediately after the heading. e.g. **Heading 1, 1**

Tab leader allows you to choose a character that will carry from the end of the heading text to the beginning of the page number.

Show levels enables you to select how many of the total 9 levels of headings you wish to be shown in the Table of Contents

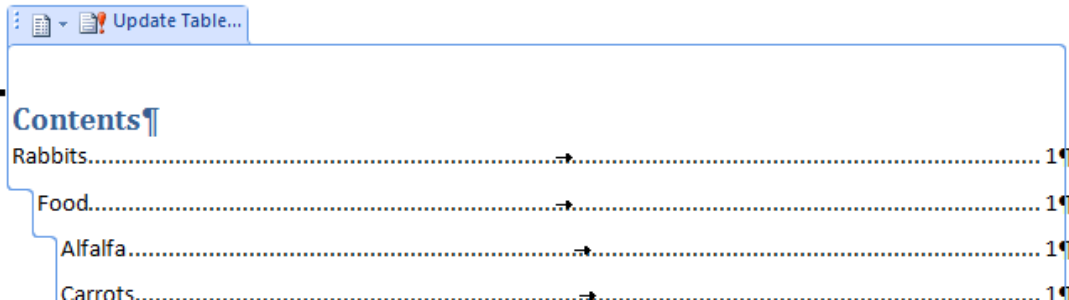
Use hyperlinks instead of page numbers is useful if the document is going to be used online. The user can click on the topic heading in the table of contents and the focus will jump to the relevant position in the document



Lesson 7: Removing a Table of Contents

2007 format or later

If the Table of Contents was created in version 2007 or later when you click in it you will see a border and heading appear



When you see this you can either click the  symbol at the top of any page of the Table of Contents and then select **Remove Table of Contents**

Or click the References ribbon and the **Table of Contents** icon and select **Remove Table of Contents**

Document format earlier than 2007

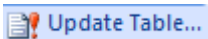

If the file has been saved in the .doc (97 – 2003 document) format then you the Table of Contents is just shaded grey when you click in it.

In this case you must manually select the whole table of contents and then press the delete key

Lesson 8: Updating a Table of Contents

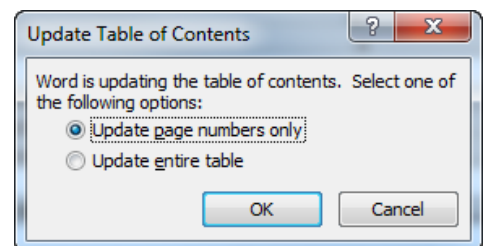
Since the time you originally inserted the Table of Contents you may have added new headings that need to be shown in the Table and/or added text that means that headings are now on different pages to those shown in the Table.

To update the table to reflect these changes place your cursor in the Table and either

- i. Click  at the top of any page of the Table of Contents that your cursor is in
- ii. Click the right-hand mouse button on the Table of Contents and select  Update Field or
- iii. With the cursor in the Table of Contents, press the **F9** key on the keyboard

In all cases you will see the dialogue box shown right. If you have only added text (i.e. no new headings) and/or page breaks you can select the **Update Page Numbers Only** option and do a quick update that will only check the page numbers.

If you have added new headings which you wish to be shown in the Table select the **Update entire Table** option and the Table will be rebuilt according to the settings you originally chose.




It is probably safer to always use **Update entire table** to ensure that you do not miss out on any new headings etc!

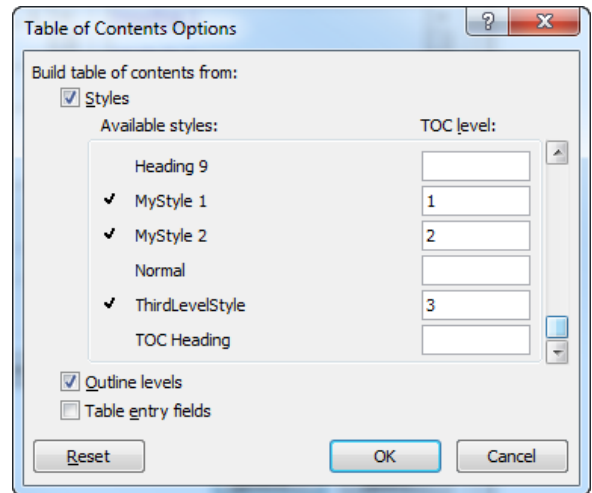
Lesson 9: Automatic Table of Contents Using Non Standard Styles

If you have created your document using your own custom made styles you can still create a table of contents. All the options stated in the previous task will apply but there is a further stage of defining the styles used

Changing styles used

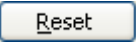
1. First make sure your text cursor is placed in the position you want to insert the Table of Contents
2. Click the **References** ribbon and then the **Table of Contents** icon (at the left)
3. Click **Insert Table of Contents** at the bottom of the list.
4. Click on the  button.

All styles are listed. The standard heading styles will have numbers in the **TOC level** (Table of Contents level) box to their right, indicating which level the text which uses that style is to form. You will need to remove those numbers and place the relevant numbers next to the styles you have used.



e.g. If you have used the style called **MyStyle 1** for your 1st level headings you will type **1** in the box to the right of **MyStyle 1**

Returning the settings back to normal

Select **Insert, Reference, Index and Tables**, and select the **Table of Contents** tab. Then click on the  button and click the **Reset** button to put the number back next to the standard heading styles and remove any custom numbers you have entered.

Lesson 10: Footnotes/Endnotes

Definition

If you wish to explain a term, or make comments outside the main text area you can use footnotes or endnotes.

A footnote appears on the same page as the text it refers to.

An endnote appears either at the end of the document, or at the end of the section (you could divide each Chapter into a section so that the endnotes appear at the end of the Chapter)

You can have both footnote and endnotes in your document, but in that case you must ensure that each has a different type of numbering. See Lesson 13:

Inserting footnotes

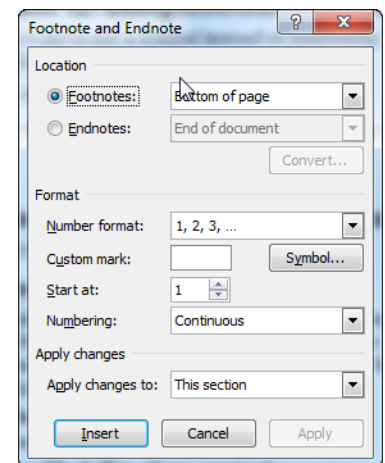
Click the **References** ribbon

Click **Insert Footnote**

- i) If you are in **Print layout view** you will move to the bottom of the page, or the end of the document.
- ii) If you are in **Draft** view a window will appear at the bottom of the screen

In either case you can type the footnote text you require.

If it is the first footnote you have inserted you will see the dialogue box shown right.



You need to select the **Number format** you want to use and then click **Insert** (for more details on this dialogue box see Lesson 13:Altering Footnote/Endnote Options)

Inserting Endnotes

Click the **References** ribbon

Click **Insert Endnote**


- i) If you are in **Print layout view** you will move to the bottom of the page, or the end of the document.
- ii) If you are in **Draft** view a window will appear at the bottom of the screen

In either case you can type the endnote text you require.

If it is the first endnote you have inserted you will see the dialogue box shown above right. Select the **Number format** you want to use and click **Insert**

Returning to the text

In either Page Layout or Normal view, when you have finished typing the footnote text place your cursor before the footnote reference symbol/number and double click to return to the point where you left the main document

In Normal View you can also return to the text by clicking on the  button in the footnote window.

Deleting Footnotes

You will delete the footnote if you delete the footnote mark in the text. Highlight the footnote mark and press the **Delete** key on the keyboard.

Moving footnotes

If you have placed the footnote mark in the wrong place highlight the footnote mark and drag it to a different position in your text

The line separating the footnote from the text

This can be altered by viewing a footnote in **Normal** view. You will see the box

Endnotes All Endnotes at the top of the endnote window (similar for footnotes). Click on the button and select **endnote separator**. You can then delete, or edit the line as you please.

Lesson 11: Reviewing footnotes/Endnotes

It is sometimes difficult to find a footnote reference, even when you thought you knew where it was!

To find footnotes you can use the **next** and **previous** options.

Click the References ribbon, click **Next Footnote** or click the down arrow at the right **Next Footnote** to move to the previous footnote, next Endnote or previous endnote.

Note.

If your cursor is in the document text you will be taken to the next/previous footnote or endnote reference number or symbol. You can then double click this to see the footnote or endnote text.

If your cursor is in the footnote or endnote text then you will be taken to the next/previous footnote or endnote.

Lesson 12: Using footnotes or endnotes with symbols

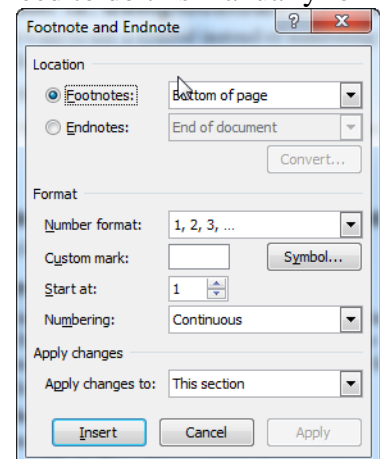
If you want to use a symbol instead of numbering for your notes you will need to do this manually for each foot/endnote.

Click the **References** ribbon

1. Click the symbol to the right of the **Footnotes** group heading.
2. Click to select either the **Footnotes** or **Endnotes** location
3. In the **Custom mark** box type the symbol (e.g. *) you want to use for that foot/endnote.
4. Click **Insert**


Repeat steps 1 to 4 for each foot/endnote – ensuring that the symbols are different for footnotes on the same page.

Note: this is not a recommended method as edits in your text may require you to change the symbol for the footnotes. It is useful, however, to understand this use of the Footnote and Endnote dialogue box.



Lesson 13: Altering Footnote/Endnote Options

Click the **References** ribbon

Click the  symbol to the right of the **Footnotes** group heading.

Note that when you are making changes to **existing** footnotes or endnotes you must click the

 button and **not**  since **Insert** will insert a new footnote or endnote.

Footnotes

Location

you can choose to have footnotes always appearing at the **bottom of the page**, or **below** text which means just below where the text ends so that on a half full page the footnote will be half way down the page.

Format

Number Format: Choose different numbering systems, e.g. a,b,c or i, ii, iii or even a symbol sequence *, †, ‡, §,

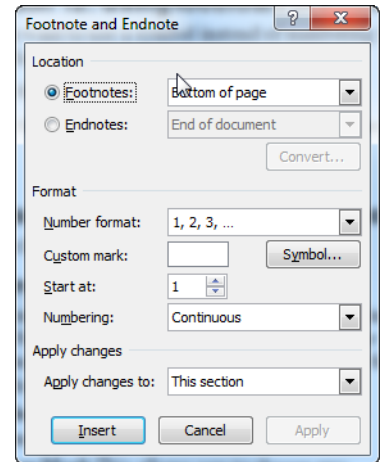
Custom Mark see Lesson 12: Lesson 12: above.

Start at: allows you to alter the starting number – useful if this document carries on from another.

Numbering: The default situation is that the numbering is consecutive throughout the document (**Continuous**) but you can choose to restart the numbering on each page, or in each section.

Apply Changes

Apply Changes to: This allows you to have different numbering systems in each section of your document, or to run the changes through the whole document.



Endnotes

Location

You can choose the endnotes to be either at the end of the whole **document** or at the end of each **section**.


Numbering


Again, you can change the numbering format and starting point.

The default is that the numbering is consecutive throughout the document but you can make it restart at each section.

Converting Footnotes to endnotes and vice versa

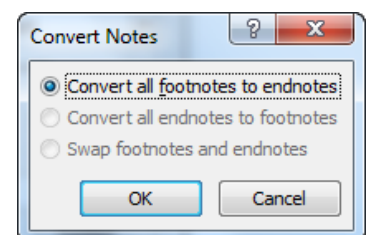
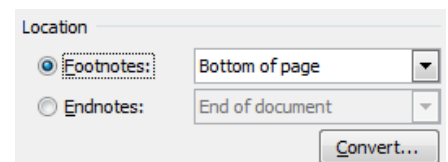
Click the **References** ribbon

Click the  symbol to the right of the **Footnotes** group heading.

In the Location section select **Footnotes** if you want to convert footnotes to endnotes. Then click  (which will be unavailable if you have no footnotes)

Click on the option you require and click on **OK**.

Click  from the **Footnote and Endnote** dialogue box..



Lesson 14: Marking Index Entries

To create an index there are two stages: First you will need to decide what needs to go into the index and mark those positions, once this is done you can then insert the index

To mark Index entries

Highlight the text in the document which you wish to appear in the index and either press **Alt Shift X** or on **References** ribbon, in the **Index** group click **Mark Entry** You will see the dialogue box shown right.

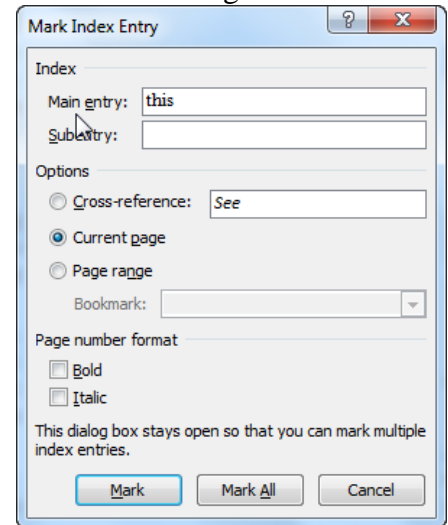
The text which you highlighted will be shown in the **Main entry** box. If this is how you want the text to appear in the index then click the **Mark** button.

The Index box will remain open so you can mark other index entries. Scroll through the document, highlight text you wish to appear in the index, click in the **Main entry** field and click **Mark**



You may wish to create an entry with a subentry
e.g. Index: creating.

In this example you would type *Index* in the **Main Entry** box and *creating* in the **Subentry** box and click the **Mark** button.

If the text you have highlighted appears more than once in the document and you wish each occurrence to be indexed click on the **Mark All** button, but note that this will only apply for text where upper and lowercase letters exactly match those in the Main entry box.



Editing index entries

When you mark text for inclusion in the index an entry of the form {XE “Creating an Index”} will be placed in the document after the text which you had highlighted. In the example given **Creating an Index** is the text that will appear in the index. The text can be edited but the entry is formatted as *hidden text* and will only be visible if the  button on the Home ribbon is depressed – showing . Once you can see the text then just click and edit.

You can add *flags* The simplest of these are \b which will make the index entry bold (in the actual index) and \i which will make it italic.

Deleting an Index entry

Make sure that you select the complete index entry, including the { } and press **Del** on your keyboard

Notes.

1. The index entries should be marked before the Table of Contents is inserted, otherwise if you use the **Mark All** option entries in the Table of Contents will be indexed!
2. You must accept all tracked changes (if any) before the index will work correctly
3. You must have the index entries **hidden** before the page numbers in the index will be correct
4. When typing index entries ensure no extra spaces creep in. If you have “Index: Creating” (space after colon) and “Index:Creating” (no space after the colon) these will be treated as separate index entries and not combined. You should NOT leave a space after the colon.
5. Do NOT cut and paste text into the Main Entry field as the style will be taken with it if you do, and two identical looking pieces of text that have different styles attached will not be combined.

Lesson 16: Correcting sorting issues

Unexpected sorts

Problem 1: If you have an index entry like {XE “Taylor:of England”} the the sub entry will be sorted by the word “of” (as shown right) which is incorrect. It should be sorted by “England”

Taylor
clothes, 5
Genealogy, 5
of England, 2

Problem 2: If you have {XE “1 Big Bad wolf”}, {XE “3 little pigs”} and {XE “12 days of Christmas”} these will be combined in the index in an unexpected order, as shown right:

1 Big bad wolf, 2
12 days, 1
3 little pigs, 3

Controlling sorts

You can add a semi colon after the text for the level whose sort you wish to control, within the quote marks, and then type the text you wish to sort by

For **Problem 1** we can edit the index entry field as follows

{XE “Taylor:of England;England”} and then the sort will be correct – as shown right

Taylor
clothes, 5
of England, 2
Genealogy, 5

For **Problem 2** we can edit the index entries for numbers less than 1 so that they are sorted by 01, 02 etc, editing the index entries as follows: {XE “1 Big Bad wolf;01”} and {XE “3 little pigs;02”} .The result will be as shown right

1 big bad wolf, 2
3 little pigs, 3
12 days, 1

You could use the sort control at both levels – e.g. {XE “1933;Nineteen:in the USA;USA”}

marvellous, 1
1933
King Kong Premiere, 5
in the USA, 2

This would put the main entry under ‘N’ rather than under 1, and sort the sub entry under ‘U’ and not ‘i’

Lesson 17: Creating more than one index

It is possible that you may want two indexes, each dealing with different subjects within your document.

Editing Index Entry fields

In this case you must first edit the Index entry fields adding the flag \f followed by the name of the index in quotes. Let’s say we want an index covering Nursery Rhymes and one for World War 2.

We could then have {XE “Big bad wolf” \f “Nursery Rhymes”}

and {XE “German Blitzkrieg” \f “World War 2”}

If you now insert an index in the usual way neither of these entries will be in it!

Creating a named Index

Method 1

From the **Insert** ribbon click **Quick Parts** and then **Field**

Under **Field Name** find and click then

Find \f and click

Following the \f type the Index name (exactly as you typed it in the Index entries)

Click **OK** twice and your index should appear

Method 2

Insert an index in the usual way (if you already have an index then say that you do not want to replace the selected Index)

Change to view the field by pressing **Alt F9** on the keyboard

You should see something like `{INDEX \c "3" \z "1033" }`. You can then click inside the `{ }` and add the `\f` flag followed by the Index name exactly as you typed it in the Index entries
e.g. `{INDEX \c "3" \z "1033" \f "Nursery Rhymes" }`

Then change back to view the index using **Alt F9** again, and remember to right click that index and update it.

Note both these methods produce the same result!

Lesson 18: Adding Captions to Tables and Figures

This is useful in that it automatically numbers Charts, tables and/or pictures which has two main advantages. Firstly – if you move a table to a different position in the document the number will automatically be updated and secondly you can create a table of contents for the charts etc.

Adding captions

Highlight the table or figure and from the **References** ribbon click **Insert Caption**.

Caption: Type the caption you require (note that you can change the label as below)

Label: Select the type of **label** you require from the choice of **Equation, figure or table**. If you need a label other than those click on the **New Label...** button, type the label you require and click **OK**. **Position:** Select whether the caption should appear above or below the original object.

Exclude label from the caption If this is ticked then the caption will contain only the number and any text you choose to add and no label. Eg. **1. A cat** instead of **Figure 1: A cat**

Numbering: Click on the **Numbering...** button to select the type of numbering required (e.g. 1,2,3 or i,ii,iii etc)

Once you have completed the options you should click **OK**

Updating the numbering

Note that when items with captions are moved the numbering is not immediately updated. It will be updated when you close and save the document and re-open it.

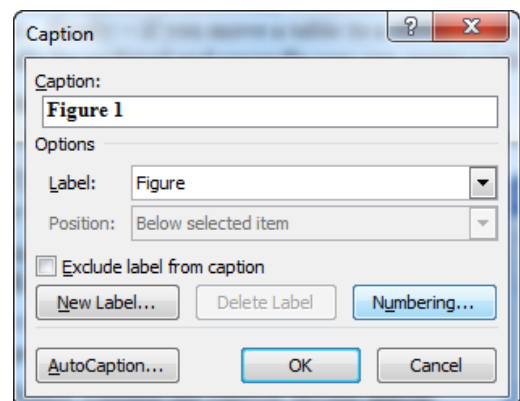
However, to view the changes immediately:

Highlight the whole document (**Ctrl A**) and press the **F9** key on the keyboard (this will update **all** fields in the document, e.g tables of contents etc)

Autocaptions

If you need a caption for each table or figure you create you can instruct *Word* to do this automatically as you create the item

Select **Insert, Caption** and click on **AutoCaption...**



Click the item you wish to create an automatic caption for, select the label you want for that type of item and whether it should be below or above the item.

Click **OK**

Lesson 19: Creating Tables of Charts, Tables and Figures

You will need to create a separate table for each kind of “label”

Inserting the index

First make sure that you cursor is where you want the table to appear in your document.

Select **Insert, Reference, Index and Tables** and click on the **Table of Figures** tab

From **Caption label** choose the label for which you wish to create a table, choose a layout for the table in the **Formats** box, and click **OK**

Updating the index

If any figures have been moved their caption numbers will change. These changes will not automatically be reflected in the table of contents so you must remember to update this.

The safest way to ensure **all** fields are updated is to highlight the whole document (**Ctrl A**) and press the **F9** key on the keyboard. You can update only one caption by clicking in that caption

Updating Fields

When you highlight the whole document and press **F9** the fields will be updated in the order in which they appear in the document.

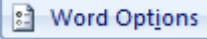
If your Table of Figures appears at the beginning of the document (as it normally does) then this will be the first thing to be updated, with the captions as they are at that point. Then Word will go on and update each caption as it finds it. Thus at the end of the update process the Table of Figures will not match the captions! You need to update again immediately so that the Table of Figures uses the up-to-date captions.

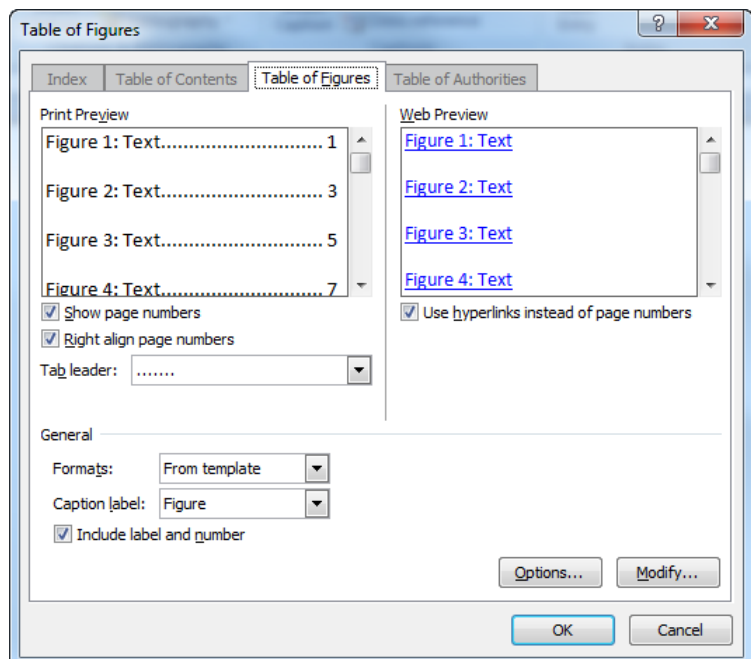
The conclusion is that you should highlight the whole document and update fields twice, i.e. press **F9** twice

The other problem is that fields in Headers and Footers are not updated unless you enter a header or footer, Press **Ctrl A** to select All and then press **F9**

Updating fields automatically

You can tell Word to update fields automatically before you print. Note that it will update once only so the problems mentioned above still apply, but at least an update is done in case you forget completely.

Click the globe at the top left. Click  and click **Display** on the left. Go to the **Printing Options** section and place a tick in **Update fields before printing** .



Lesson 20: Using Cross references

There are times when you want to refer to another chapter, or numbered item within your document. If you merely type *see page 12* then every time you add text before page 12 you must check to see if the item you were referring to is still on page 12.

Microsoft Word can do this more efficiently

Inserting Cross References

When you are ready to insert the reference click the **Reference** ribbon, and in the **captions** group click **Cross-reference**

Under **Reference type** select the type of object to which you wish to refer. E.g. select **Headings** to see all the text formatted with the Heading styles

Scroll down in the list to find the particular item which you wish to reference and then consider **how** you wish to refer to it.

Under **Insert reference to** you can choose from options similar to the following which are explained with reference to the point **iii) Gain control of your ego** in the outline shown right:

Heading text: This inserts the words *Gain control of your Ego* into the text

Page number: This inserts the number of the page that the heading is on e.g. **2** You should type the word *page* before the number to make this clear.

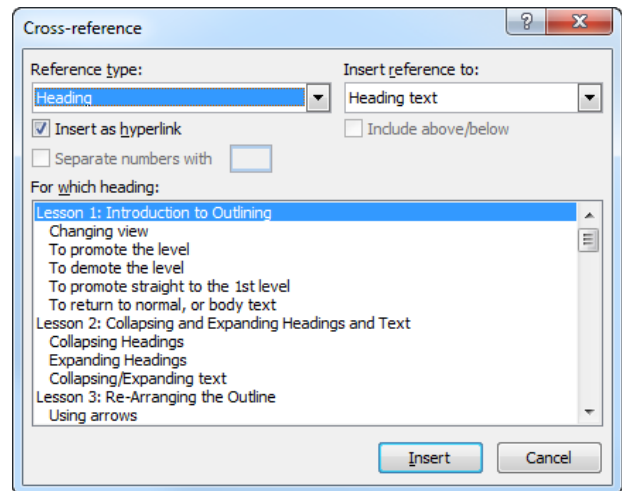
Heading number: What this inserts varies according to where you are when you do the insertion. If you are in text anywhere under section **1) a)** it inserts **iii)** – since you are in the same section. If you are elsewhere in the document, say, somewhere under **2) a)** then it will insert **1) a) iii)**

Heading number (no context): This will always insert **iii)** regardless of where you are when you insert.

Heading number (full context): This will always insert **1) a) iii)** regardless of where you are when you insert.

Above/Below: This insert either the word **above** or the word **below** depending whether object which you are referring to is above or below the position of the cursor when you insert.

You may wish to say *see page 6 above*. You would type *see page* and then select **Insert, Reference, Cross reference**, select *Heading* under **Reference type** and *page number* under **Insert reference to**. In order to get the *above* part as well you must then click the **Include above/below** option.



- 1) GETTING STARTED**
 - ⊕ **a) Gaining Control**
 - i) Gaining Control of Yourself
 - ii) Getting Started
 - iii) Gain Control of your Ego
 - iv) Gaining Control of your Topic
- 2) BAD WRITING IS BAD FOR BUSINESS**
 - ⊕ **a) Some Causes of Poor Writing**
 - i) A Lack of Professional pride
 - ii) Ignoring the reader
 - iii) A Lack of Confidence
 - iv) Inexperience
 - v) Writing for the Wrong Reason
 - vi) Strict requirements
 - **b) Writing is an essential skill!**

Separate Numbers with applies only to numbered items, with full context. In this case you can decide what you want in between repeated references.

When you have selected all the options you require click **Insert**. Note that the box stays open in case you want to insert something else, so you could build up something like *see **Getting started on page 6*** where the items in bold are inserted cross references.

You can click outside the dialogue box to type text and then inside the box to insert another reference.

Click **Close** when you have finished.

Lesson 21: Bookmarks

If you wish to refer to a piece of text that is not numbered or formatted with a heading style within the document you must first create a bookmark.

Creating a bookmark

Highlight the text to which you want to refer. On the **Insert** ribbon, in the **Link** group click **Bookmark**

Enter a bookmark name (no spaces!) and click **Add**

Using a bookmark in a Cross reference

With your cursor in the position where you want the cross reference, from the **References** toolbar click **Cross-reference**

Under **Reference Type** click **Bookmark**

Under **Insert Reference to:**

- If you select **Bookmark text** the whole of the text you selected when you created the bookmark will be repeated
- It makes most sense to use **Above/Below** or **Page Number**

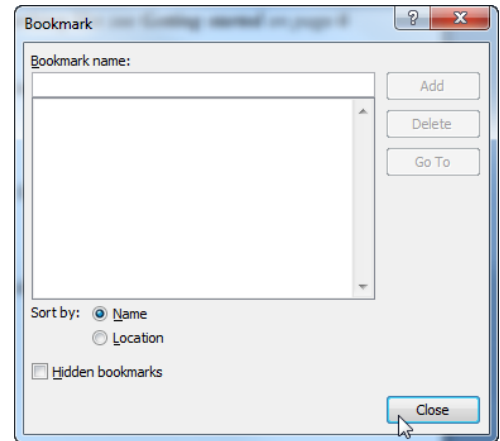
Using a bookmark to get to a position in the document quickly

You can also use the bookmark to jump to the position in the document.

From the **Insert** ribbon click **Bookmark**

Click the name of the bookmark you want to use


Click the **Go to** button



Lesson 22: Borders

Simple bordering of text

Select the paragraph(s), table, cell or picture to be bordered


From the **Home** ribbon, click the arrow for  at the bottom right of the **Paragraph** group (It may not look like this as the appearance on the button reflects the most recent border change you made)

You can then click on the line, or lines that you want. The line you click will be added to any existing lines.

If the button face shows the bordering option that you want to use then just click the button, not the arrow.

More detailed bordering options

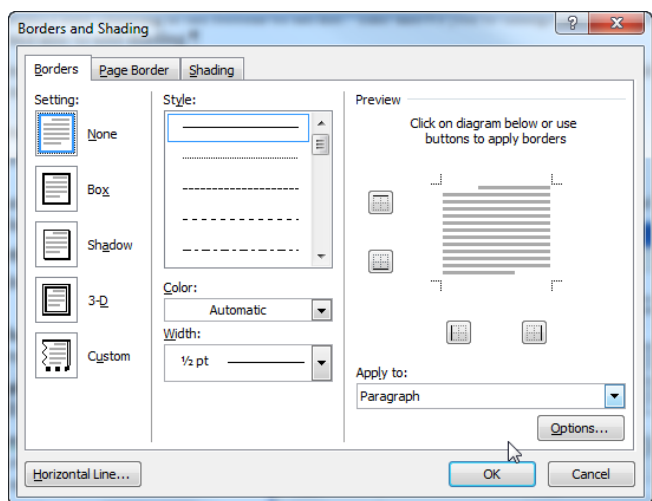
You could also do more refining of line.

From the **Home** ribbon, click the arrow for  at the bottom right of the **Paragraph** group and click **Borders and Shading** at the bottom of the list. This allows you to change the line style and colour, and also to add shading.

First select the line style, colour and width you require, then click on the Preview in the position in which you want to add the line.

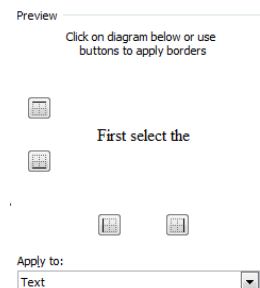
What exactly am I bordering?

Take careful note of the picture in the Preview section as it indicates what you are bordering. The picture shown right shows a paragraph, and this is confirmed in the **Apply to** option at the bottom right




If you have selected text then you may see something similar to that shown right. Note that the text I selected is **First select the** and this is all that will be bordered, though it is only part of a paragraph. Note **Text** is shown in the **Apply to** option. The result would be as shown below

First select the line style, colour and width you require, then click on the Preview in the position



You can also choose to border a table or a cell.

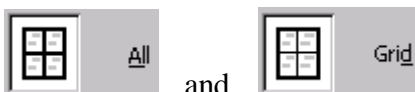
Bordering a table

Highlight the table to be bordered, (**Alt 5** on numeric keypad, or click the  symbol at the top left of the table)

Select **Home**,  **Borders and Shading**

The **Apply to** option at the bottom right will show “table”

The **Preview** box will reflect a table and among the **Setting** options the you will see two options



The difference lies in the thickness of the internal lines.

You can also add lines exactly where you want them as before.

Bordering a cell

If you have selected **one cell** (click in the bottom left of the cell) and you select **Format, Borders and Shading** you will only be able to border that cell.

Lesson 23: Protecting the Document

Protecting the document

You may wish to pass your original document to someone else to comment on, but be able to see clearly the changes they have made. You can do this by protecting the document and copying it to the relevant person. They can then look at it on screen and make additions and/or deletions freely. By protecting the document first, however, you will have a record of their alterations as they will be shown in a different colour. You then have the option of accepting or rejecting the changes that have been made.

To protect the current document from the **Review** ribbon click **Protect document** at the right.

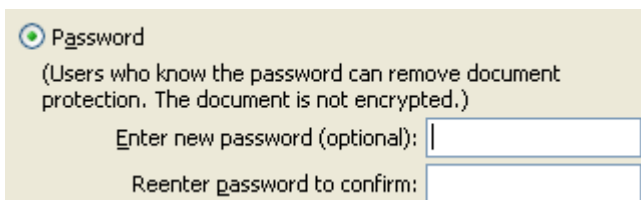
Click **Restrict Formatting and Editing**

There are various ways of protecting, but here we will only consider the option for **Tracked changes**.

Click to add a tick to **Allow only this type of editing in the document** and select **Tracked changes** from the option box.

Click

You have the option of putting a password in.

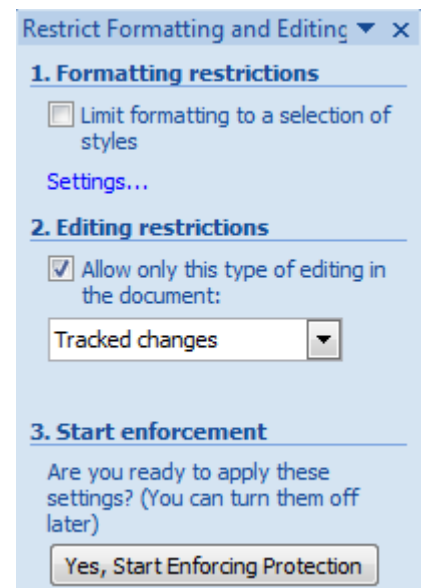


You should use this if you do not want anyone to be able to unprotect your document. You will be asked to enter the password twice to avoid errors since you cannot see what you type

Remember your password as it cannot be otherwise found out so if you forget it you could lose access to the file. You may prefer to make a copy of the file and protect that.

Once you have protected the document you can make sure that any alterations are shown in a different colour. These alterations are called *Track changes*.

The tracked changes are shown on screen – you can alter how they are shown when the document is unprotected



Lesson 24: Accepting/Rejecting Track Changes

Once the document has been returned to you after having been revised by perhaps many people you will want to look through the document and either accept or reject the revisions

To do this first unprotect the document and then look at the revisions

Unprotecting the document

From the **Review** ribbon click **Protect document** at the right.

Click **Restrict Formatting and Editing**, Click 

If you used a password you will be asked to type this in.

You can also click the  button on the **Protect Document** window at the right if it is still open.

Controlling how tracked changes are shown on screen

From the **Review** ribbon click **Track Changes** in the **Tracking** group and click **Change Tracking Options**

You can then choose the colour/style you prefer for each type of change.

Note that changes made by different users will be in different colours. You can change the user name you are using. Click **Track Changes**, **Change user name** and enter a new user name. Each change is marked with user name.

Accepting /Rejecting revisions individually

Before accepting or rejecting the changes you must unprotect the document as explained above.

On the **Review** ribbon, in the **Changes** group click  to move to the next change (or  for the previous change)

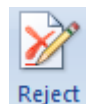
Accept Changes -

Click the top of the button to accept the currently selected change and move to the next.
To accept **all** changes click the arrow at the bottom and click **Accept All Changes in Document**.



Reject Changes -

Click the top of the button to reject the currently selected change and move to the next.
To reject **all** changes click the arrow at the bottom and click **Reject All Changes in Document**.



To see changes by specific reviewers

On the **Review** ribbon click  and click **Reviewers**. You will see a list of reviewers in the colour used for their changes. Remove or add ticks beside the reviewer's names to control whose changes to see.