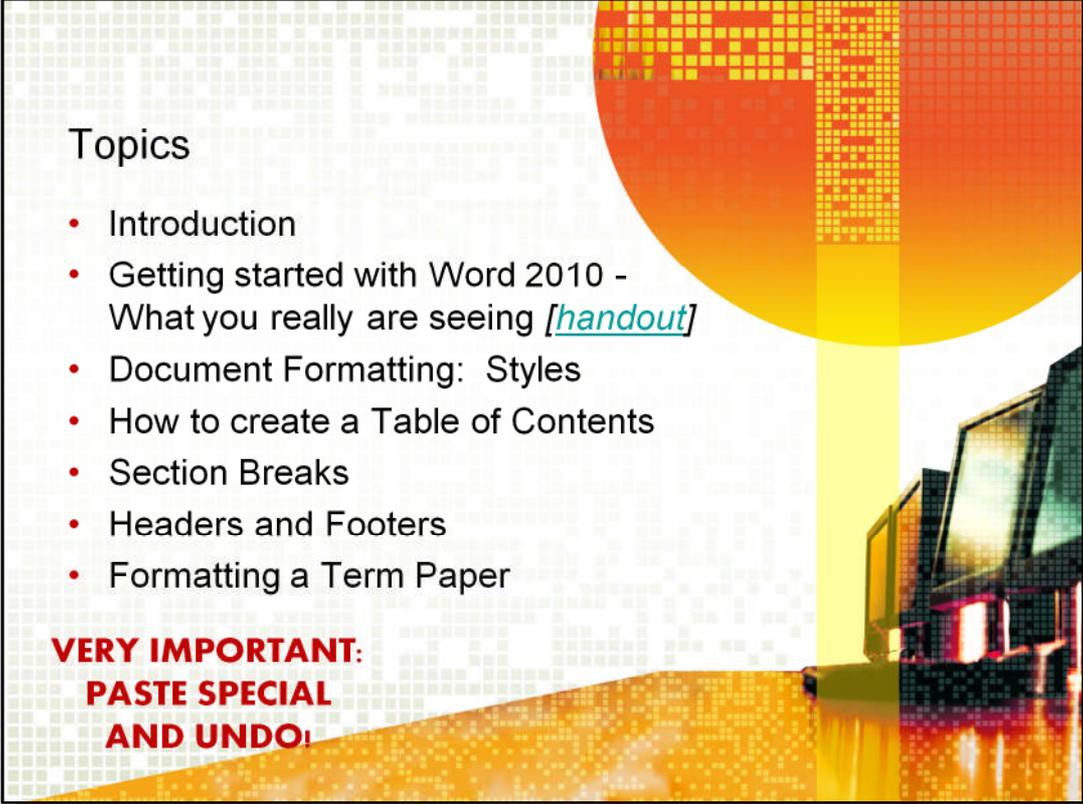


The graphic features a large, stylized sun in shades of orange and yellow on the right side. The background is a grid of small squares in various colors, including orange, yellow, and grey. In the bottom right corner, there is a reflection of a computer monitor on a glossy surface.

Spring Training

Formatting 101

May 24, 2013



Topics

- Introduction
- Getting started with Word 2010 -
What you really are seeing [[handout](#)]
- Document Formatting: Styles
- How to create a Table of Contents
- Section Breaks
- Headers and Footers
- Formatting a Term Paper

**VERY IMPORTANT:
PASTE SPECIAL
AND UNDO!**

My job title is Document Specialist. I have been formatting Word documents now for over 15 years. As part of that, I have done training (usually in PowerPoint, Excel, Adobe and Visio), but I must admit to you that other than helping a new employee, I haven't done a training in a word processing program in more than 20 years. So, this might not be the perfect training session today, but I'll do the best I can.

I must say that today we are only going to scratch the surface. Word is an amazingly powerful tool. You can sit down at your computer and begin to type – you know: you'll tab or maybe you'll spacebar five or ten times, you'll type some stuff, you'll return twice because it's a new paragraph, and you'll do that over and over again until you're done. What you're going to end up with is a flat document. (hold up a piece of paper). What I'm going to teach you today is going to help you to bring those flat documents to life. You'll save time, effort and your end result will be better than you ever imagined. You see what I do – the Roundtable, for example. That is done in Word. You won't be able to do that after today, but if you pay attention and ask follow up questions when you have them (yeah, even if it's a couple of months from now – I'm always am reachable by email), you're going to be on your way to a better document, and these skills will go with you as you move down your educational highway.

I don't expect you to even want to do what I do – after all, you're all going to be engineers, computer scientists, or entrepreneurs, right? You'll be making money out the wazoo and hiring people like me – or not. But after today, you'll have a foundational idea of how to put a document together.

Oh! And before I forget it, I have emailed three documents to you for use during and after this class. If you have brought your laptops, you will have an opportunity to format a real term paper (that you didn't have to do the research for) at the end of this session. It will include headers and footers, section breaks, a table of contents, page numbering, and styles). If you did not bring your laptop, please review this presentation at home and try to format the document.

Two other things I must mention. You need to remember two very important things from today going forward. Always copy and PASTE SPECIAL. Do not just copy and paste. [tell them why] AND your best friend is the UNDO key.

Okay, let's go to the HANDOUT.

Document formatting: Using styles

- What is the definition of a [style](#)?
 - A style is a set of predefined formatting instructions or characteristics, such as font, size, paragraph alignment and spacing.
 - When you apply a style, Word will format the text according to how that style has been defined.
 - Use styles to create stable documents with consistent formatting.
 - Styles are the backbone of paragraph numbering, tables of contents, and cross-references.

When I started out with my first word processing program, I thought it was so great because before that I used the good old-fashioned typewriter. But with word processing, I could make a correction and no one would even know I had to (because you couldn't see the erasure or the white out blob wasn't on the page). My documents began to look really professional.

Now, I couldn't conceive any other way than Word. And I couldn't imagine sitting down and just typing without using something called styles.

When you look at a document – and you must think about what you are trying to create – what you are trying to present – and about consistency – you will see certain trends. For example, the size of font you are using. If you are going to indent your paragraphs or not. If you want spacing between paragraphs. If you want to bold or not. If you want to underline or not. If you have a title, what you want it to look like (color, underlining, bold). Without redundantly adding keystrokes to what you're trying to accomplish, you can create certain styles which include some of these features, none of these features, or whatever you want your outcome to be. Suppose you are told to prepare a paper that can be no longer than two pages, and lo! And behold! It turns out to be two pages and two lines. You also are told the font can be no smaller than 12 points. You have subtitles throughout that must be 14 points, so you can't just CTRL+A (to select all of the text) and then change the font everywhere. But you can take a Sneaky Pete approach and change the font size of just your paragraphs down to 11.5 points (no one would ever suspect looking at the document that it is just the tiniest bit smaller than 12!). Styles can make this possible in just a couple of keystrokes. Alternatively, if you're very rigid about the 12 points, and even though you are told the document must be double space, you can move the paragraph spacing down just a bit to bring those two dangling lines back to two pages. Styles definitely are the way to go.

Document formatting: Using styles (cont'd)

- Why use styles?
 - The alternative: Direct Formatting
 - Downside:
 - Directly apply an Font attribute (font, size, underline, italics, etc.)
 - Directly apply Paragraph style (no indent, small indent, block indent, etc.)
 - Takes time, especially if you want a change made throughout an entire document
 - Styles are a time saver.
 - You can change a document's appearance all at once
 - Allows you to easily create Tables of Contents
 - Heading styles can be customized

If you use Direct Formatting, you are directly applying a look to text and that's about it. The look doesn't carry to any other text in the document.



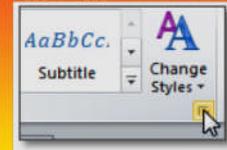
Document formatting:
Using styles (cont'd)

- Types of Styles:
 - Paragraph
 - Most important style
 - Format a whole paragraph at a time.
 - Paragraph styles Heading 1 to Heading 9 work automatically with multi-level list numbering, tables of contents and cross-references to make the useful and powerful.
 - Character
 - Format specific text within a paragraph (called Paragraph style – indicated by ¶).
 - Character styles automatically format for features such as hyperlinks and page numbering
 - When you type a web address and it turns blue and underlined – that is a character style at work.

Paragraph Styles are what a great part of this class today is about. However, even though this is a PowerPoint presentation, you already have seen the use of a character style on the first slide.

Applying Styles

- Use the Quick Styles Gallery (found on the Home tab)
- The Quick Styles gallery is useful for applying styles quickly, but to really work with them, you need to use the Styles pane. To display it, click on the dialog box launcher in the Styles group.

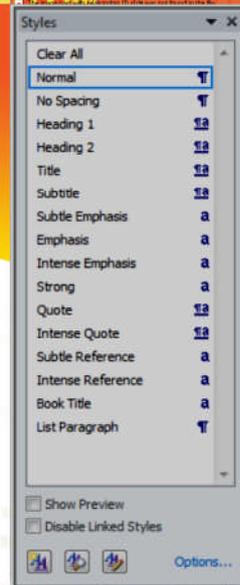


 **Note:** Styles are everywhere in Word. When you start typing, you are already using a style – the default paragraph style called Normal. This is an important one, and it is used as the basis for many of the other built-in styles.

I rarely use the Quick Styles gallery; however, please feel free to use if you would prefer. Styles are all about your preference for the look of your document. Then again, if you are given a term paper to do with a certain set of prescribed rules to follow, you can make styles to fit those requirements.

Applying Styles (cont'd)

- To apply a style, click in the paragraph, or select the text, and click on the style name. Note that in the pane, character styles are indicated by the symbol **a**.
- To see how the style formatting will look when applied, click the Show Preview option.
- You can use the buttons at the bottom to create a New Style , examine the formatting with the Style Inspector  and import and export styles through Manage Styles .

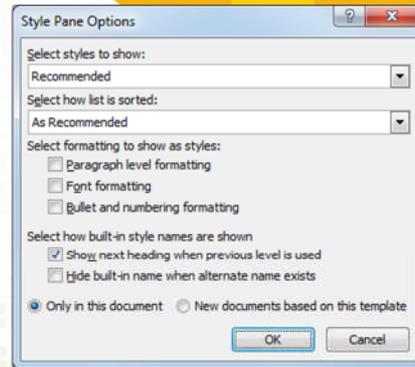


 **Note:** The Styles pane can be moved around by dragging the title bar. It can also be “docked” to the right or left of the screen. To dock it, double-click on the title bar.

Applying styles is as easy as a click. You can apply styles to one paragraph, multiple paragraphs, or an entire document. You can selectively apply styles of certain paragraphs of your document by CTRL+click certain paragraphs and then click the style you want to apply.

Applying Styles (cont'd)

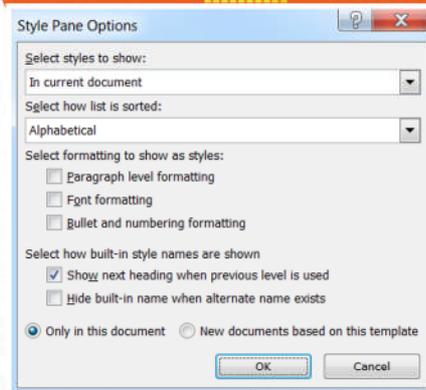
- If you click Options in the Styles pane, you can control other features related to Styles in Word.
 - Under Select styles to show, choose from **Recommended**, **In use**, **In current document**, or **All styles**.
 - **Recommended** connotes Word's predefined list of styles.
 - **In use** means Word will only list the styles actually applied in the current document.
 - **In current document** means Word lists the styles available for use in the current document, including ones that are not actually applied.
 - **All styles** means Word lists the Full list of styles.



There are certain characteristics about your styles you will want to keep in mind, and this is the place where you do that.

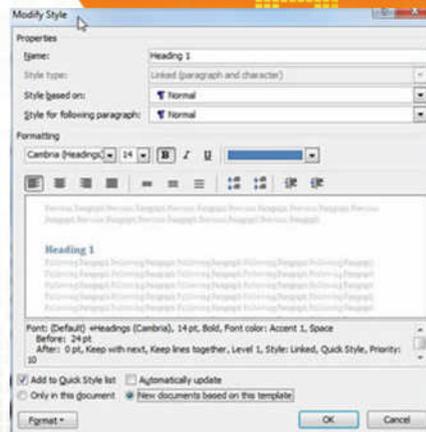
Applying Styles (cont'd)

- In Select how list is sorted, you can define the order that styles are listed in the pane. Keeping it on **Alphabetical** makes it easier to locate a specific style.
- Under Select formatting to show as styles, it is a good idea to leave all the options in this selection deselected.
 - Why? With Font formatting selected, any direct formatting you apply, such as bold or italic, will appear as entries in the pane, making the Styles pane appear very cluttered.
- You can also choose when and how to display style names. The most useful option is Show next heading when previous level is used. This means that Heading 3 will appear in the Styles pane when you apply Heading 2; Heading 4 when you apply Heading 3; etc.



Modifying Styles

- In the Styles pane, move your cursor to the style name and click the down arrow. Choose Modify from the drop-down menu. The Modify Style dialog box displays.
- You can change basic font and paragraph attributes in the Formatting section. For a full list of options, click on the Format button. You can then access the settings for all formatting, such as font, paragraph, tabs and borders.



You can name styles and select the attributes you want, which are distinctive to the desired style of your paragraph/document.

Modifying Styles (cont'd)

- **NOTES:**

- Any change you make apply to the current document, only.
- To apply the changes to all new documents, select New documents based on this template, though be careful with this – it will affect every document you create.
- Another way to modify a style is to format a section of text as you want the style to look. Select the text and right-click on the style name and select Update <style name> to Match Selection. The style will be applied to the selected text.



BEWARE: Never use the **Automatically update** option. If this is selected, Word will update your style every time you apply manual formatting to a paragraph where the style is applied. This will wreak havoc in your document!

Creating a Style

- If you find you are repeatedly applying the same direct formatting in a document, but there isn't a built-in style that suits, you can create your own. 
- You can create a style using the New Style button from the Styles pane. This will display Create New Style from Formatting dialog box.
- Give your style a name (use something descriptive to make it easy to identify).
- Watch out for the Style based on box. When you base one style on another, changes to the parent style will affect your new (child) style. For example, changing the font of the parent style will also change the font of the child style. This is known as cascading styles. If you don't want this to happen, select (no style) from the drop-down.

I create new styles as I need them, especially when I want a document to look a certain way all the time. You even can have all of your documents look the same way by saving your new style list as a Word template and having all of your new documents “default” to that style list when you create a new document. You even can copy styles from one document to another. It sounds sophisticated, but once done, it’s a huge time-saver.

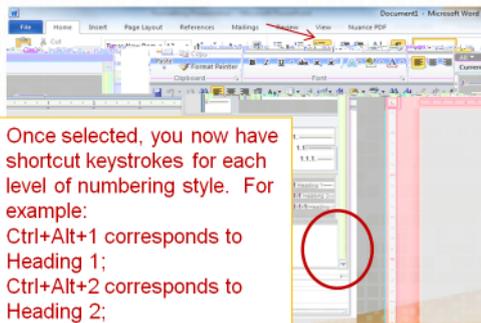
Creating a Style (cont'd)

- The **Style for following paragraph** option tells Word the style to use after you press the [Return] key to end your paragraph. Word assumes you will be continuing in the same style, but for a heading or a quotation, you are likely to want to return to whatever style you are using for the body of the document.
- Complete the formatting as you require, using the options from the Format menu, and click OK.

This is one of my favorite features. In my job, our lawyers have to answer Interrogatories (or a set of questions posed by the adversarial party). My job is to set the document up so they can answer or respond to the Interrogatories. The way the style template is set up by my firm is to have the numbered Interrogatory (yes, our template changes the number as you move through the document) followed by the Answer. Some of the lawyers want to continue responding after the initial paragraph which contains their initial response. I always change the numbered Interrogatory style to be followed by Body Text Indent 2 (which means this is a Body Text style that is double spaced with the first line indented by 1 inch (that's the way in law – in the real world, the rule is ½ inch)) rather than the Answer style. It's pretty cool and a time saver, too, because my job is demanding and I've got to work quickly – all the time. So do you because undoubtedly you were given that term paper to write three months ago, you've done absolutely no research, two months and 29 days are now gone, and the paper is due tomorrow! You have no time to waste!

Styles and Numbered Headings

- The Home tab contains tools that you can use to apply outline numbering and create tables of contents. The procedures used to modify outlines are somewhat different than modifying a style for paragraph numbering.
- Step 1: Select an Outline from the Multi-Level List



Once selected, you now have shortcut keystrokes for each level of numbering style. For example:
Ctrl+Alt+1 corresponds to Heading 1;
Ctrl+Alt+2 corresponds to Heading 2;
And so forth.

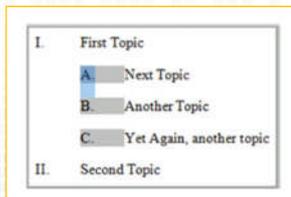
So, selecting this outline list, your outline will look like this:

- I. Heading 1
- II. Heading 1
 - A. Heading 2
 - B. Heading 2
 - 1. Heading 3
 - 2. Heading 3

In the last slide, I talked about Interrogatories, and we use a numbered style for them. But you won't be using that kind of numbered style. Instead, you're going to be using an outline style more often than not.

Styles and Numbered Headings (cont'd)

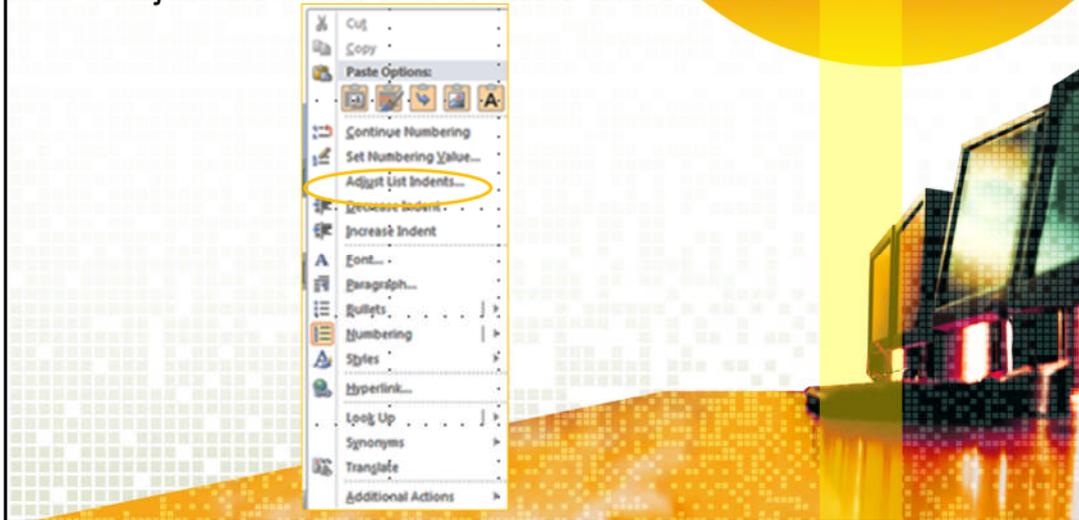
- **Numbering Attributes**
 - Numbering attributes, such as indent settings, number formats, and punctuation are stored as part of the multi-level list rather than within the style itself.
- **Modifying an Outline Level**
 - Click any “number” within a level to select it.



In contrast to paragraph styles, to change a numbering or outline style, you have to make your changes in two places.

Styles and Numbered Headings (cont'd)

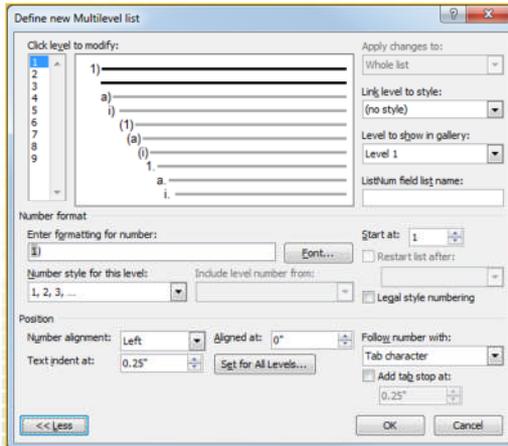
- Right-click the selection and choose Adjust List Indents from the shortcut menu:



This changes the look or characteristics of the number, only.

Styles and Numbered Headings (cont'd)

- From the Define new Multilevel list dialog, make the changes desired and click OK to finish.



Note: This changes the numbering part of your heading, only. To change the text part of the numbering style, you need to make text (font, color, size), paragraph (number of spaces after or before), etc., adjustments at the style level.

Once you set up your outline or paragraph numbering, and you say OK, when you go back to the document, you will want to modify the paragraph part of the outline or paragraph numbering at the paragraph style level (as we did previously with paragraph styles).

Table of Contents

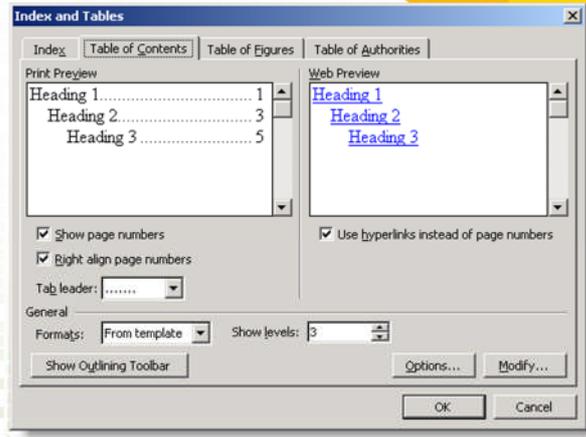
- A Table of Contents is generated from the heading, title or subtitle fields in a document.
 - To Create a Table of Contents
 - Apply heading styles to the text you want to include in the Table of Contents.
 - Click where you want the Table of Contents inserted.
 - On the References tab, click the dropdown next to Table of Contents and select Insert Table of Contents.



Now that you have the ability to style your document, you can decide which of the styles you will need to create your Table of Contents. There's no typing involved – just selecting the styles or outline numbering levels you want to include and voila! You've got a table of contents. You even can make changes to the body of your document after you've created and generated the Table of Contents, and then go back and refresh your Table of Contents – no problem at all!

Table of Contents (cont'd)

- Select the number of levels to display from the Show Levels spin box.



- Click OK.

Table of Contents (cont'd)

- As a best practice, always update your Table of Contents before printing or sharing your document.
 - Right-click in the existing Table of Contents and click F9 to update:



- You can update just the page numbers in the Table of Contents if you have just made changes in the body of the document, or Update entire table if you have added other parts of the document which would include a heading.

Setting up a document: Section Breaks

- PLEASE NOTE:
 - A section break controls the section formatting of the text that precedes it. **When you delete a section break, you also delete the section formatting for the text before the break.** That text becomes part of the following section and it assumes the formatting of that section. For example, if you separate the chapters of a document by using section breaks and then you delete the section break at the beginning of Chapter 2, Chapter 1 and Chapter 2 are in the same section and assume the formatting that previously was used only by Chapter 2.

To have a document that contains different parts of the document with different looks, you will need to use Section Breaks. You can have a single document which has a section which is portrait, and the next section might be landscape, and the third section might go back to portrait. You can have a single document with starts out with a single column of text, and it might be followed by two or three columns – as the Roundtable is formatted. Each distinct part of the document is called a section.

Setting up a document: Section Breaks (cont'd)

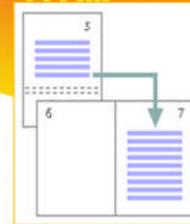
- Section break examples:
 - The following examples show the types of section breaks that you can insert. In each illustration, the double dotted line represents a section break.
 - The **Next Page** command inserts a section break and starts the new section on the next page. This type of section break is especially useful for starting new chapters in a document.
 - The **Continuous** command inserts a section break and starts the new section on the same page. A continuous section break is useful for creating a formatting change, such as a different number of columns, on a page.

So, in a term paper, the cover would be a section; the Table of Contents would be a section; the body of the paper would be a section; and the Bibliography would be a section.



Setting up a document:
Section Breaks (cont'd)

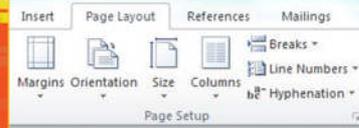
- The **Even Page** or **Odd Page** command inserts a section break and starts the new section on the next even-numbered or odd-numbered page. If you want document chapters always to begin on an odd page or even page, use the **Odd page** or **Even page** section break option.



To be perfectly honest, I do not use this feature, but I wanted to point out to you that it is another feature which is available. This type of section break most often would be used by book publishers, or folks creating pamphlets, etc.

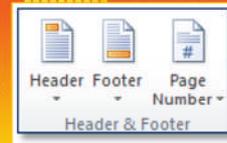
Setting up a document: Section Breaks (cont'd)

- Change the document layout or formatting by using section breaks:
 - Click where you want to make a formatting change.
 - You might want to select a portion of the document around which to insert a pair of section breaks.
 - On the **Page Layout** tab, in the **Page Setup** group, click **Breaks**.
 - In the **Section Breaks** group, click the section break type that fits the type of formatting change that you want to make.
 - For example, if you're inserting a portion of the text which will be columns, you would click **Continuous break** before and after that section, inserting the number of desired columns where the columns begin and changing back to one column



Setting up a document: Headers and Footers

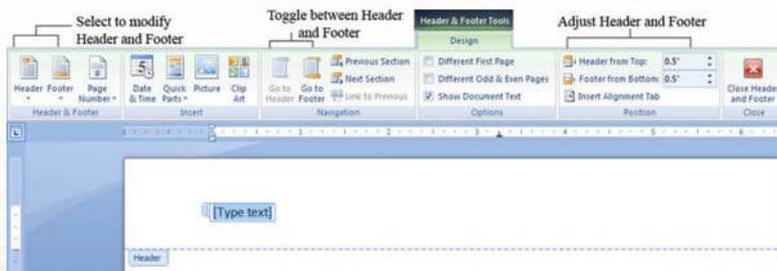
- Headers and footers, done well, can add a lot to your document. Whether you add a simple page number or go fancy by adding custom fields, you can use headers and footers to give your readers relevant information about the document.
- On the **Insert** tab, in the **Header & Footer** group, are three commands:
 - **Header**
 - **Footer**
 - **Page Number**
- The Header and Footer menus contain galleries of built-in designs, options to Edit and Remove the Header or Footer, and the ability to save selected text to the header or footer gallery.



Headers and footers are a hard concept, and sometimes it seems they have behaviors all their own. Some of my peers create headers and footers from the back of the document going to the front, and some prefer to create them from the front to the back. It is a personal choice. You must remain focused with the outcome you want to achieve.

Setting up a document: Headers and Footers (cont'd)

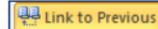
- The Header & Footer Tools Design contextual tab appears on the Ribbon to make the functions specific to headers and footers available.



Tip: You can also insert page numbering without being in the header or footer. From the Insert tab, in the Header & Footer group, select the Page Number menu.

Setting up a document: Headers and Footers (cont'd)

- Other groups of commands available on the **Header & Footer Tools – Design** tab include:
 - The **Insert** group with commands to insert Date & Time, Quick Parts, a Picture, or Clip Art.
 - The **Navigation** group includes commands for navigating headers and footers (Go to Header, Go to Footer, Previous, and Next). It also contains the tool used to link and unlink headers and footers from the prior section. It is called Link to Previous.
 - The **Options** group contains the commands to create a Different First Page header and footer, set up Different Odd & Even Pages, and show or hid the text of the document while in the header or footer.
 - The **Position** group contains commands for setting the distance of the header/footer from the top/bottom of the page and for setting an Alignment Tab. **Alignment Tabs** are relative to the margin (left, center, or right), so automatically adjust if margins or page orientation changes.

A small screenshot of a software interface showing a button labeled "Link to Previous". The button has a small icon of a document with a double-headed arrow and is highlighted with a yellow border.

Formatting a Term Paper

- You obviously must follow the requirements for the paper.
- For purposes of this lesson, our “paper” will have a cover page. All pages (except for the first page of the term paper, the cover and the Bibliography) will be numbered in Arabic numbers, centered at the bottom of the page. The Table of Contents, which will precede the term paper, will show the page numbers in lower case Roman Numerals, which will be centered at the bottom of the page. Each page of the document will have the student’s name in the upper right-hand corner, along with his or her book number. The cover will contain the name of the document centered on the page and one to two inches from the bottom margin, the cover will show the student’s name, Central High School, the course of study, the period, the due date, and the teacher’s name. Finally, all will be 12 points in Times New Roman font. Let’s look at the sample document and then see what you can do with this.

My email address: conradk76@aol.com

YOU WILL HAVE QUESTIONS!



**THANK YOU FOR
PUTTING UP WITH ME!**

