Producing large documents

Using some of the features of Microsoft Word to create and manage larger documents

# Introduction

This document contains a number of functions of Microsoft WORD that can be used to help in the creation of large documents such as dissertations and reports. It is not possible to set these out in the form of a step-by-step procedure, because there are several versions of WORD that have been designed slightly differently for different computer operating systems. Despite these differences, the functions described here are common to all of these variants, but you will have to find out for yourselves precisely how they work in your particular version.

Because of these variations in WORD, this document will simply provide a list of the functions that you ought to consider and provide a simple explanation of each so that you know what you are looking for.

Several of you will know several of these things already, so there will be no need to read about them afresh.

## The challenge of creating and managing a long document

One of the main concerns we have in producing long documents is the complexity and the extent of the argument. So we must:

* Organise ideas to best effect
* Ensure the flow of argument

We must also help the reader to follow the argument by:

* Providing effective signposting in the document by consistent use of appearance and layout through appropriate formatting

But when we use formatting, we also often need to comply with standards that are set by the person to whom we are presenting our document. In essence, this means:

* Complying with a style requirement means choosing the formatting style to follow, for example, adopting:
  + The University's formatting requirements for a dissertation;
  + A consultant's chosen style in presenting a document to clients in a consistent and recognisable way;
  + A clients' style requirements so that members of the client organisation can navigate their way around a new document in a manner with which they are familiar.

Finally, we must also ensure that the document is accurate and is understood to say what the author intended, by:

* Editing, including radical editing.

## Consistency in formatting

Formatting refers to the way we choose to present text. Typically, we can modify font type, text size and style. We can also modify the appearance of paragraphs in terms of line spacing and justification. These style variations are particularly obvious in the formatting of headings. For each type of block of text - paragraphs, headings, and captions - it is important to use the same formatting style whenever a particular type of text is encountered. For example, whenever we see a main heading, it should look like every other main heading that we use in the document, so that the reader will recognise them both as equally important in the argument we are presenting in our document.

## Topics

In order to use WORD effectively in producing a document we shall identify the following features or functions. These are indicated in bold italics in the paragraphs that follow. The topics are as follows:

* Different views in WORD
* Using outlines in WORD
* Styles
* Numbering headers and paragraphs
* Creating sections
* Creating footnotes and endnotes
* Inserting tables and figures
* Creating a Table of Contents
* Creating templates
* Checking spelling

# Different views in WORD

When we type documents into WORD they can be presented to us in different ways:

* Draft View
* Print Layout (or Reading Layout)
* Outline view
* Print Preview
* Navigation Pane
* Zoom

The first 3 of these can be viewed by making a selection in the VIEW menu. By choosing these different options, you will see that same document presented in different ways that provide different advantages.

The 4th option, Print Preview is located in the FILE menu.

The 5th option, Navigation Pane (probably 'Thumbnails' is the closest in WORD 2007).

The 6th feature **Zoom**, is just the facility to zoom the screen image to different enlargements - a very useful feature.

\*\* You can look at the present document in each of these views to see how they vary.

So, why are these options worth looking at?

## Draft View

This is a general view for looking at a document, with which we are all probably familiar. It presents the whole document in a continuous 'roll' with the text looking like it will appear when printed. What we do not see in **Draft View** is how the text breaks with different pages and how diagrams and tables fit in.

## Print Layout (or Reading Layout)

This provides us with a view of the document where we can see page breaks and other features, as well as the basic character and paragraph formatting. This is helpful when we want to see where text ends on a page or where paragraphs break over two pages.

## Outline view

This presents the same document in outline form. In this view it is possible to collapse and expand different parts of the document. This makes it easier to work on these different parts. It is also easy to move blocks of text around the document should you decide that the order of things needs to be altered.

When you switch to Outline View a new menu bar appears that enables you manipulate the outline in different ways including, promoting and demoting headers, and expanding and contracting different parts of the document.

The document will only work as an outline provided the author has developed the document as an outline. This present document has been prepared as an outline, so, by switching to Outline View you will be able to see its various features.

The main benefits of Outline View are that it is very easy to move parts of the document around if you want to change the order of the argument. It is also very easy to make sure that formatting is consistent. And it is very easy to create tables of contents.

If you have a large document that has not been created as an outline, it is still possible to reconfigure it as an outline and then reap the benefits of outlines.

## Print Preview

From the File menu it is possible to see the document exactly as it will print out. This looks very similar to the layout in Print Layout. While it does not show much difference from Print Layout, Print Preview is generally worth using just before you undertake a print run as it will show you in a clear way how each page is set out and where the page breaks will come. Doing this as a final check can save wasting paper.

## Navigation Pane

The Navigation Pane is something different as it provides an extra window to the left hand side of the main document window. This shows the whole document in terms of its various sections. This helps you to move around the document easily.

# Using outlines in WORD

Getting into the habit of using outlines in WORD can be a real time saver. Producing an outline has lots of benefits to aid productivity:

## Planning and organising with Outline view

Some of you will be familiar with terms like 'Ideas processors' and 'Mind Maps'. These are just ways of taking an idea and breaking it into its constituent parts and then reorganising these parts until they provide the most appropriate representation of what you are aiming to convey. The basic idea of the Outline in WORD is very much like this. It is a good way to start any document. The Outline View was used to start the present document. It was used to set out the main themes, then consider which issues needed to be dealt with under each theme. Sometimes it was necessary to split a theme into two - sometimes it was helpful to combine them. Then it was useful in reorganising the order in which ideas were presented.

The present document was a typically complex arrangement. Naturally, some issues were raised before other issues. But then it turned out that it would be better to mention something earlier than it was first introduced. This was because an earlier item really depended on the explanation of an idea that had been introduced later on. You may disagree that the present document, as it stands, has presented these ideas in the best possible order - there are certainly other ways of ordering this material. There may be areas where additional headers and sub-headers could be introduced. You can always turn this document into Outline View and experiment for yourself.

## Organising the document for consistent formatting styles and document management

Earlier, it was mentioned how important it is to maintain a consistent formatting style within a document. I have tried to do this in this document.

The top level of the document is the title of the document. The second level of the document represents a new theme or issue that I would wish to discuss. You can see this in the outline where each new theme is the second level down. You can also see this in Draft View or Page Layout View because these headers are all formatted with the same font and the same level of numbering. Then the next level down (and the next level of sub-header in the document, items ate all numbered with 2 digits (e.g. this section is 3.2). If I were to change something in the Outline from level 3 to level 2, its formatting would also change in Draft View or Page Layout View. This is really handy for maintaining consistency of formatting.

# Styles

Some of you will already know about formatting 'styles'; others of you will not have heard of them. In fact, every character, word, paragraph and document that you see in WORD has a style (usually called 'normal'), but you don't notice it because it is a default style.

## Formatting in WORD

Most people realise that they can change what a piece of text looks like using the Format menu. This gives us access to choices where we can change the look of individual fonts and paragraphs. Thus, we can change the Font in terms of its:

* Font: e.g. Times Roman, Ariel, Helvetica
* Style: e.g. bold, italic
* Size: e.g. 8pt, 10pt, 12pt, 16pt
* And some other features such as 'small caps' and other things that we do not use very much.

And we can change the appearance of paragraphs in different ways such as:

* Left hand margin
* Justified
* Hanging indent
* Double spacing
* Space before and after.

In large documents, especially, if we simply format things as we go along, we soon discover that we have adopted different principles of presentation in different parts of the document. This means there will need to be a lot of very careful editing before the final document can be released if it is to appear professional and be readable. This is where styles come in useful.

## What is a style?

If you were to consider a single header and then decide that it should be formatted in 14pt Ariel bold font, with a space of 12pt before it and 4pt after it. Then you type a paragraph that you format in 12pt Times New Roman at 1.5 spaces between lines and justified, so that both sides of the paragraph were straight.

Then you come to the next header and want to format it as before. So, you need to remember how you formatted the previous header and then you have to go through the routine of carrying out this formatting. Then you have to get back to typing and formatting the next paragraph. At the end of all this, you might decide that Ariel does not look too good in headers and you don't want 1.5 spaces after all. So you have to go back to the start and deal with every block of text again.

This is where styles are useful. Instead of formatting separate words and paragraphs, you format a general style for different sorts of words and paragraphs. Then you simply apply the style when you come across a block of text where you think that style is appropriate. This means that everything that is given a particular style has the same format as everything else with that style.

If, later on, you decide that you want things to look different, you can edit the style and everything that has that style will change in a consistent way. So you gain consistency and save a great amount of time.