# User Guide for Penn State Thesis Template (PSTT) for Word 2011

For questions, help, or assistance with PSTT, contact:

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## Background

This user guide should be used along with the Penn State Thesis Template (PSTT) file, named “PS Thesis Template Mac 2011.doc.” This version is for use with Microsoft Word 2011 on Macintosh. There are other versions for use with other versions of Word.

PSTT is provided and supported by PSU ITS. This user guide will explain how to start with PSTT and import any existing writing into the template, use the predefined type styles, page numbering, and formatting of the template. Use of the PSTT is optional, but you will probably find that it saves you time and that it will help you to produce a consistent, professional-looking document.

The template and this user guide are provided in a compressed format, which you need to expand.

## The Thesis Office

The Graduate School, the University Libraries, and the graduate faculty of Penn State have established format standards that a thesis must meet before it receives final approval as a fulfillment of a graduate requirement. The Thesis Office is the unit of the Graduate School responsible for certifying that theses have been prepared in accordance with these established regulations.  
  
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Items of interest on that page include:](http://www.gradsch.psu.edu/current/thesis.htmlAlso)

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For help with any of these issues contact:

Office of Theses and Dissertations

115 Kern Building

University Park, PA 16802

Phone: 814/865-5448

E-mail: gradthesis@psu.edu

## Assigning type styles

PSTT relies on use of Word "styles" to accomplish formatting and generation of the table of contents and lists of figures and tables.

A style is a named group of attributes of text which together define the appearance of the text. For instance, a style named Heading3 may be bold, centered, and larger than the body text. It may also have particular spacing before or after, indenting, or any of a large number of possible attributes.

To use PSTT, it is important that you understand how to apply styles to text in Word. Applying styles is the only Word operation required in PSTT with which most people are not familiar. Styles are a powerful tool to help make your writing appear more consistent and professional. Once you get familiar with using styles in PSTT, you should try to incorporate them in your daily writing, since they will help you to produce a more consistent looking, professional document.

To apply a style to text, click your cursor anywhere in some text in your document--in a heading for instance. Once you apply a particular style, the style will be applied to that entire line or paragraph of text.

There are two ways to apply a particular style

1. From the Word menu at the top of the screen, select Format-->Style. A list of styles will appear in alphabetical order. You may need to scroll in the list, but double-click on any style name to assign that style to the text where your cursor is located.

or, 2. Make sure you have the Word Home tab near the top left of your screen selected. Look toward the right in the Ribbon and you will see the Styles tool group. Click on an icon to assign that style to the text where your cursor is located. You may need to scroll right or left to locate the desired style in the Ribbon.

You should assign an appropriate style to each level of heading you have, indicating the importance, or rank, of the heading. Likewise you can specify styles for captions, extended quotes, etc.

### You can modify any of the existing styles by:

- From the Word menu at the top of the screen, select Format-->Style.

- Click on the style you wish to modify.

- Click the Modify button near the lower-right of the window.

- Change the attributes as desired. By clicking the Format button near the lower-left, you can choose a group of attributes then make the changes you desire.

### You can also create new styles if you like:

- From the Word menu at the top of the screen, select Format-->Style.

- Click the new button to create a new style.

- Name the style and specify the attributes as desired.

### These styles are particularly important in PSTT:

- Normal...this is used for body text

- Heading1 through Heading 6...use for headings. Heading 1 is only for chapter titles. Headings with higher numbers indicate less important headings.

- FigureCaption and TableCaption...use for captions to allow automatic generation of lists for the frontmatter. Do not manually change the style attributes of your captions or the automatic generation of lists for the frontmatter will not work correctly. If you wish to change the appearance of the captions, modify the caption style as discussed above.

- LongQuote...used for direct quotations of three sentences or more. It provides the indentation and line spacing typically used for prose extracts.

## Inserting figures and tables

The best way to add figures and tables is to select an existing figure or table along with its caption, then copy and paste into the new desired location. This helps you to keep each table or figure to be formatted like the others. Once you have copied/pasted the new occurrence, you can insert a new table or figure to replace the copied/pasted one.

To insert a figure, you can use this menu command path:

Insert-->Photo--> Picture from file, then specify the graphic you want to insert.

Similarly, for tables, you can either create the table in Word using the table tools, or create it in Excel, then copy and paste it into your thesis.

## Notes and references

Use the Document Elements tab to manage managing footnotes, endnotes, and references. Footnotes (which appear at the bottom of text pages) or endnotes (which appear at the end of a chapter or document) are inserted using the Citations icon group in the Ribbon. Bibliography entries can be created from the References icon group. Alternatively, you can use the commercial software package called EndNote, or a similar product. EndNotem, which operates as a Word add-in, is currently available from the PSU computer store for about $50 and can also create and manage bibliographies. Make sure you get a version compatible with your version of Word.

<http://computerstore.psu.edu/> to purchase from PSU

<http://www.endnote.com/> for information about the product

## Importing text from other Word documents

It is easiest and best to do all your writing right in the PSTT template, which is just a regular Word file, but you can paste or insert text from other Word documents if you have already done some writing. If you do all your typing in the PSTT file, you only have to assign type style as described previously.

However, if you have already done some typing and have one or more existing Word documents with writing you would like to use in your thesis, then you need to get the writing into the PSTT file. There are several ways to do this, but the simplest is:

- copy the desired text in the other document

- switch to PSTT

- do Edit, Paste special, indicate Unformatted text, click OK

- assign styles as needed

- at most, paste one chapter of text at a time. Do not remove the existing chapter numbers. Edit the chapter names to match yours.

If you find "Paste special, Unformatted text" causes too many problems with lost formatting, you can do a regular Paste, but then you have to make sure that all styles get applied in a manner compatible with PSTT, to allow the Table of contents and lists of figures/tables to be correctly automatically generated.

Regardless of which way you got your text into the PSTT document, you will then need to go through the text and assign type styles to the various parts. Since most of your text will be body text, it will may be easiest to select all the text you have just put into the PSTT document (by clicking and dragging, or clicking, scrolling, then shift-clicking to select all the new text) then assign it the type style of “normal,” as described in the "Assigning type styles" section above. Then you can go through and assign other styles, such as headings and captions.

## Frontmatter

The frontmatter is everything that appears before the Chapter 1 first page. Important parts of the frontmatter include:

Table of Contents

List of Figures

List of Tables

In PSTT, these three items utilize Word fields. A field in Word is an area that has intelligence, or logic. For instance, you can set up a field to display all headings and their associated page numbers. This is how the Table of contents is displayed. The intelligence or logic is set up to look for all occurrences of styles with names that include "Heading," and to also include the number of the page on which the heading is located. You know an area is a field if it turns gray when you click on it.

The key thing to remember about fields in PSTT is to not delete or change the field in any way. If you do, the field may no longer behave correctly. It's also important to know that fields may need to be manually updated, or refreshed, in order to see the current information.

To update a field:

- Select the field by clicking on it (or Select All to select your entire document)

- Press and hold the "Fn" key on the lower left side of your keyboard.

- Press the F9 key on the top row of your keyboard

- Specify Update entire table (you will be asked this for each of the three main fields in PSTT)

- Click OK.

If for some reason you mistakenly delete one of these fields, you can re-create them:

### New TOC:

- Click where you want to insert the table of contents.

- Insert-->Index and Tables

- Click on the TOC tab

- To use one of the available designs, click a design in the Formats box. Select any other options you want.

- Click OK.

### New List of Figures:

- Click where you want to insert the List of Figures.

- Insert-->Index and Tables

- Click on the Table of figures tab

- Click the Options button

- Specify Style=FigureCaption and Table identifier=F

- Select any other options you want.

- Click OK.

### New List of Tables:

Word considers this a type of Table of Figures, so:

- Click where you want to insert the List of Tables.

- Insert-->Index and Tables

- Click on the Table of figures tab

- Click the Options button

- Specify Style=TableCaption and Table identifier=T

- Select any other options you want.

- Click OK.

## Sections

If for some reason you need to create a new "section," from the Word "Insert" menu, choose "Break," and specify "Section break type" of "Next page." However, don't insert new "Sections" unless you need to.

### Landscape format page

One reason to insert new sections is if you need to insert a landscape format page in the middle of your thesis. To do so, insert a new section as described above. Press the Return key several times to create some blank lines in the new section. Then add one more new section as described above. Instead of your chapter having just one section, it now has three. You now need to specify that the second section be landscape orientation. Put your cursor on one of the blank lines in the first new section you created. Change that section to landscape orientation:

- Select the Word Layout tab

- The first icon in the ribbon, Orientation, can be clicked to specify portrait or landscape orientation.

Thesis page numbering in MS Word   
The page numbering requirements of a thesis are very specific and fairly complex. The page numbering of PSTT is set correctly to begin with, so as long as you don’t disturb the page numbering, you should not have to do anything to accomplish correct page numbering. However, if you have lost the correct page numbering, the information below in this section should help you correct it.

MS Word does page numbering by "section." All page numbers are set up correctly in PSTT, but if you aren’t careful, you can cause problems by removing sections. If you want to view existing section breaks, from the Word View menu, choose Draft, or click the Pi icon near the top of the screen to show special characters. Section breaks will show as double dashed lines. If you want to see the most accurate view of what your printed page will look like, from the Word View menu, choose "Print Layout" but then you will not see the section breaks indicated.        
  
There are several changes you can make related to page numbering.  
- Click in the text on a page where you want to change the page numbering.  
- Choose Insert-->Page Numbers. You should see the  "Page Numbers" dialog box.  
  
 Now you can make any of several changes:  
 1) To NOT display a page number on the first page of a section, un-check the "Show number on first page" check box.  
  
 2) You can specify the position and alignment of the page numbers.

After you add page numbers, you can change them just as you might change text in a  
 header or footer. To change the page-number format, double-click the header or footer of one of your document pages.

To *not* display a page number (such as on the Vita page of a dissertation), you should be able to accomplish this by using the above information, but you may find this to be an easier way:

### Whiteout in Word

- You can hide things (such as a page number) in Word by creating a white rectangle

- Choose Insert-->Shape

- Click on the top-left rectangle shape, then move your cursor to your document, click and drag to create a rectangle.

- Double-click the rectangle you drew, specify Fill=white, Line=No line, Effects-->Shadow-->No shadow.

- Move the rectangle if necessary to cover the page number.

- The rectangle will now act as whiteout and will hide the page number.

### This is a summary of Thesis page numbering

based on the Thesis Guide, available at: <http://www.gradsch.psu.edu/current/thesis.html>\*\*\*\*\*\*\*\*  Thesis page numbering  \*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*\*  
  
                        Display   
Page                    page number?   Format           Number                            
Title page              No  
Committee page          Optional       Roman, if used   ii, if used  
Abstract                Yes            Roman            iii  
Table of contents       Yes            Roman            vi, for example  
Rest of frontmatter     Yes            Roman            xi, for example  
First page of Ch. 1     Optional       Arabic, if used  1  
Other pages of each Ch. Yes            Arabic           2, 3, 4, etc.   
First page of each Ch.  Optional       Arabic, if used  35, for example  
Vita (for Ph.D.)        No          
  
[note-Either display or don't display a page number on the first  
      page of each chapter. Be consistent throughout.]  
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## Electronic Thesis and Dissertation (ETD)

An ETD is simply an electronic version (also called Portable Document Format, or PDF) of your thesis. You can create a PDF of your thesis at any time. This is useful for distributing proofs of your thesis for others to read, since you don’t have to worry about what version of Word others have, or if they have the same fonts as you. When your thesis is done, you will probably want to create a PDF of your thesis, since a PDF is a more compact file, and is easily readable by most anybody on any computer. For Ph.D. candidates, a PDF is required, as specified by the Thesis Office.

1. To create a PDF, choose File-->Save As, type a name for the file.
2. In the Format box, choose PDF.
3. In the File Name list, Click Save.

When you have created your PDF file and are ready to submit it, go to:

<http://www.etd.psu.edu/>

and click on the hot text near the upper left which says, “Submit an ETD.”