

USING MICROSOFT WORD FOR ENGINEERS



Formatting a Test Report



WRITTEN BY LAUREN SALOIO

Please note that blank pages were intentionally inserted for printing purposes.

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FORMATTING A TEST REPORT

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Dedicated to my Mom and Dad.

ACKNOWLEDGEMENTS

This endeavor would not have been possible without Professor Solberg and my English 380 classmates who helped me to workshop many different versions and drafts of this manual. I would also like to express my deepest gratitude and appreciation to my dad for inspiring the focus of this manual, and for continuing to inspire me every day. I am deeply grateful to both my dad and Josh for their assistance with research and usability testing. Lastly, I'd like to acknowledge my roommates for always being there for me during the ups and downs of this project.

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INTRODUCTION

Welcome to *Using Microsoft Word for Engineers: Formatting Test Reports*. This manual documents Microsoft Word version 16.65 on a Mac Operating System.

WHO IS THIS FOR?

This manual is for beginner engineers that are new to writing formal test reports, or those engineers that need a digestible and reliable refresher. When writing up lengthy test reports for your company's latest product, spending too much time attempting to figure out certain features of Microsoft Word on your own can be tedious and counterproductive to the task at hand. Let this manual serve as a guide to Microsoft Word that you can rely on to make a time-consuming task much more efficient.

WHAT WILL THIS MANUAL HELP YOU DO?

This manual walks you through important formatting features in Microsoft Word that will help you to create a neat, professional, and organized test report. It also walks you through using features for collaboration in Microsoft Word, which is helpful when working with other engineers on your test report. Although this is a wide range of content, the manual focuses on the most efficient ways to get the job done and gives you helpful tips along the way.

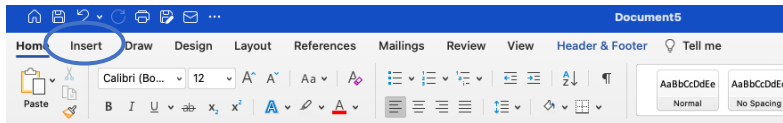
SECTION 1: INSERTING HEADERS, FOOTERS, AND COMPANY LOGOS

Headers and footers are an important way to maintain consistency in your test reports and ensure a certain level of professionalism. They allow you to easily create the same header or footer for each page of long documents. By inserting a header, you have a place to put your company logo, HSER, revisions, page numbers, the date, and data rights. By inserting a footer, you have a place to put your company name and proprietary notice.

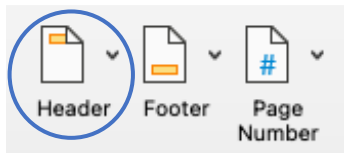
1.1 CREATING A HEADER

Headers are useful for formatting test reports because they help to make documents more consistent and professional. Headers are positioned at the top of the page and are used to hold key information in a test report such as: HSER, revisions, page numbers, the date, and data rights.

1. Click the **Insert** tab from the top menu.



2. Click **Header**. A drop-down menu appears.



3. Select the type of header that you want for your document. A new tab from the top menu appears that is labeled **Header & Footer**. This is where you can design or customize your header.

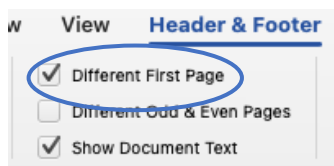


The **Badge** and **Banded** headers are useful for title pages or introducing a new section.



The **Slice 1** and **Whisp** headers are useful for inserting: page numbers, HSER, revisions, the date, and data rights for test reports. They also leave room for a company logo!

4. Click **Different First Page** from the top menu to create a different header for the first page. By default, the headers are the same on each page. When formatting test reports, you may want the first page header to be different, especially for a title page.

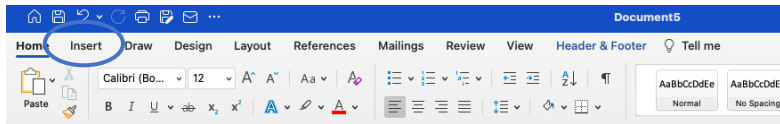


- Click **Header** from the top menu while editing the first page header to change the style of your first page header only.

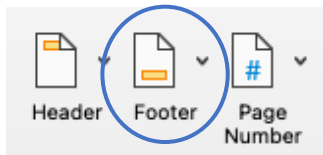
1.2 CREATING A FOOTER

Footers are a way to consistently label longer documents such as test reports. They are like headers, except they are located on the bottom of the page and usually contain more subtle information, such as the company name and the proprietary notice.

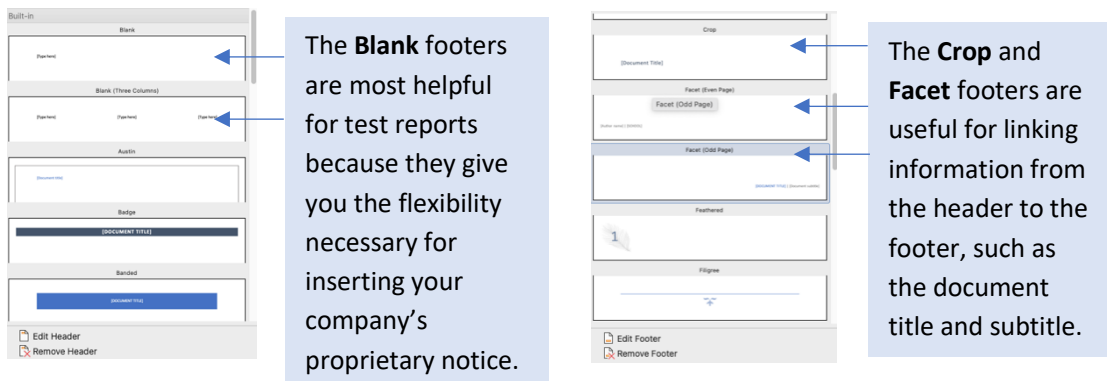
1. Click the **Insert** tab from the top menu.



2. Click **Footer**. A drop-down menu appears.



3. Select the type of footer that you want for your document. A new tab from the top menu appears that is labeled **Header & Footer**. This is where you can design or customize your footer.



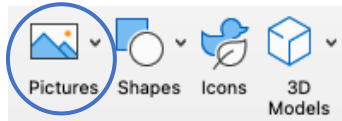
4. Type information into the footer. The typed information automatically appears on each subsequent page of the document as you continue writing.



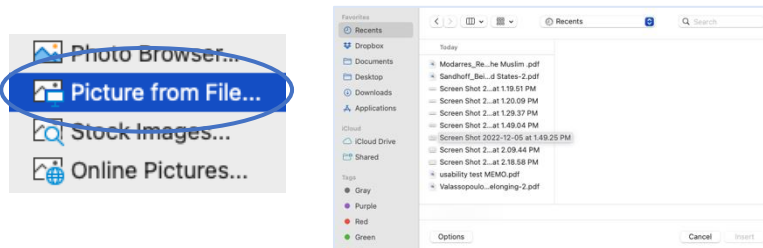
1.3 INSERTING A COMPANY LOGO ONTO THE HEADER OF A DOCUMENT

Inserting a company logo onto the header of a test report is a great way to show company ownership and present the document professionally. To insert a logo from your computer files, make sure that your company logo is saved as usable format, such as PNG, JPG, or GIF. It might also be helpful to name the file something that is easy to remember, such as “company logo.”

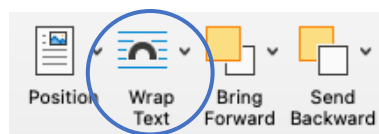
1. Double-click the top of your document to automatically create or edit your header.
2. Click the **Insert** tab from the top menu.
3. Click **Pictures**. A drop-down menu appears.



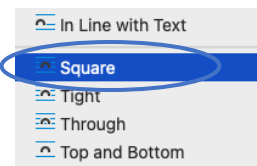
4. Select the option that says, “Picture from File...” The **Finder** window opens.



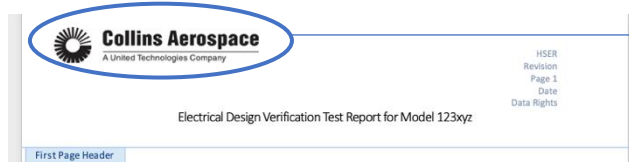
5. Locate and select your company logo file.
6. Click **Insert**. The image appears in the header and a new tab from the top menu appears labeled **Picture Format**. This is where you can format and customize your image.
7. Drag the corners of the image to make it as large or small as you want.
8. Under the **Picture Format** tab, click **Wrap Text**. A drop-down menu appears.



9. Select the option **Square**. This formats the position of the image so that the text will wrap around the image on all four sides. This also automatically changes the format of the image from “**Fix Position on Page**” to “**Move with Text**” so you can drag the image to wherever it fits best.



10. Drag the image to wherever it will fit and look best on your header. The logo is commonly found in the upper left of test reports, but it all depends on how your header is formatted.



Company logo in the upper left corner for a professional look.

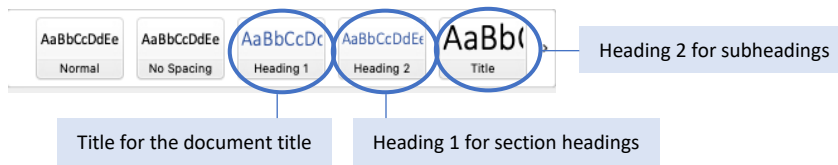
SECTION 2: CREATING A TABLE OF CONTENTS

The table of contents shows the reader the order and page numbers of the sections you will cover. This is important for test reports because readers can see the table of contents and skip to the section that concerns them. To create a preset table of contents, you first need to format your document using styles.

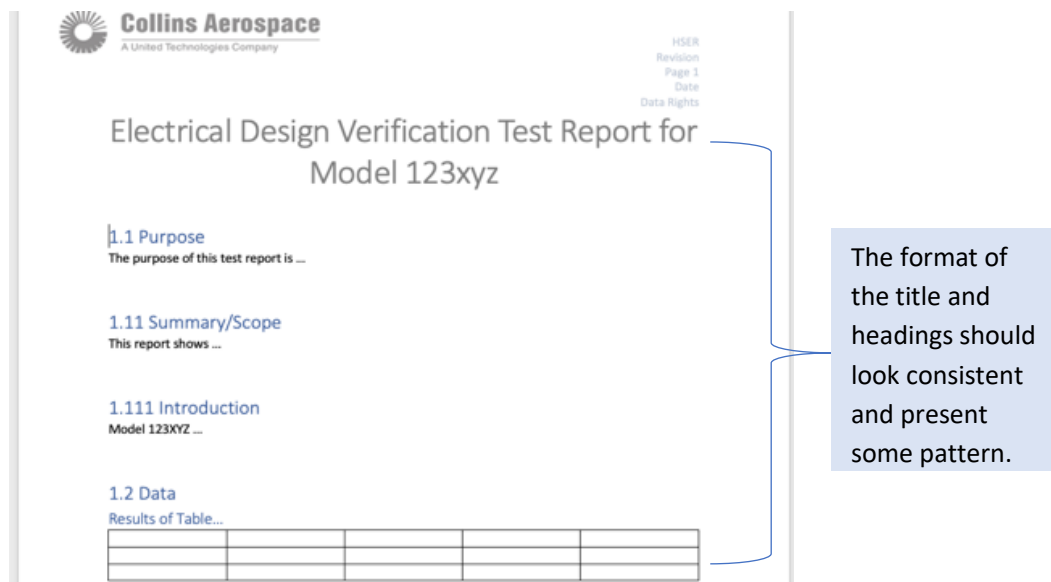
2.1 PREPARING THE SECTIONS FOR YOUR TABLE OF CONTENTS USING STYLES

To create an automatic table of contents, you first need to use **Styles** to format your document. **Styles** are preset formatting options that you can quickly apply to text to change its appearance.

1. Select the title of your document.
2. Under the **Home** tab, locate the **Styles** and click **Title**.
3. Select one of your section headings.
4. From the styles, click **Heading 1**.



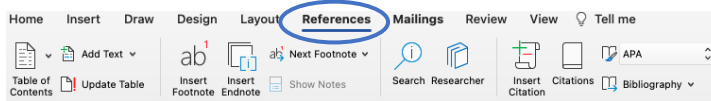
5. Repeat steps three and four for each of your section headings.
6. If some of your sections have subheadings, select a subheading.
7. Click **Heading 2**. Do this for each of your subheadings.



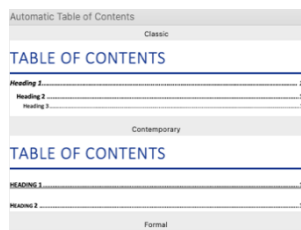
2.2 INSERTING THE TABLE OF CONTENTS

After you apply Styles to your document, the automatic table of contents feature is available for you to use. Inserting a table of contents makes your test report more organized and accessible for its readers.

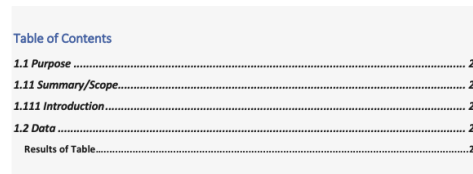
1. Click the part of the document where you want to insert the table of contents. This is usually within the first couple of pages.
2. Click the **References** tab from the top menu.



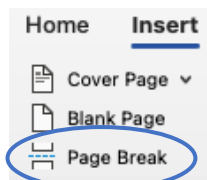
3. Click **Table of Contents**. A drop-down menu appears.



4. Select one of the automatic styles. The table of contents appears on your document.



5. Click the space after your table of contents.
6. Under the **Insert** tab, click **Page Break**. This isolates your table of contents onto its own page, and your first section begins on the next page.



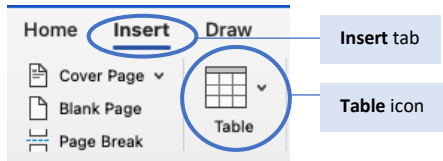
SECTION 3: INSERTING AND FORMATTING TABLES

Tables are a key component of test reports because they present data in a predetermined and organized way. There are multiple ways to insert tables that depend on how complex the table needs to be. The more complex a table is, the more you will need to use the table design features.

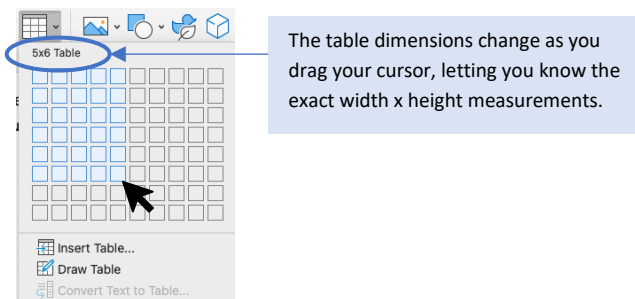
3.1 INSERTING A TABLE USING A GRID

Inserting a table using a grid is a simple way to create a table with equally proportioned columns and rows. In your test report, this is convenient when you want to present data with less complex variables.

1. Click where you want to insert a table on your document.
2. Click the **Insert** tab.



3. Click **Table**. A drop-down menu appears showing a large grid.
4. Drag your cursor over the grid and click to select the dimensions of your table.

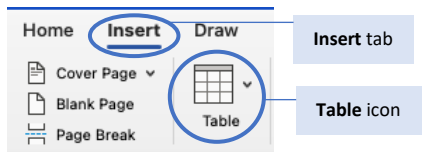


5. The table automatically appears on your document.

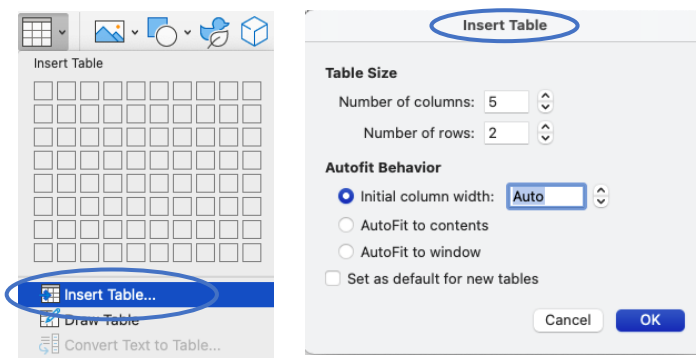
3.2 INSERTING TABLE USING THE TABLE MENU

Inserting a table using the table menu is a quick way to create and resize a simple table. This is another method that is useful for creating data tables in your test report that have fewer complex variables. You can also create a default table here, which saves your table's customized settings and provides an easy way to create a similar data table in the future.

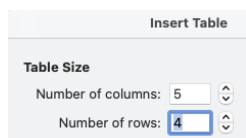
1. Click where you want to insert a table on your document.
2. Click the **Insert** tab.
3. Click **Table**. A drop-down menu appears.



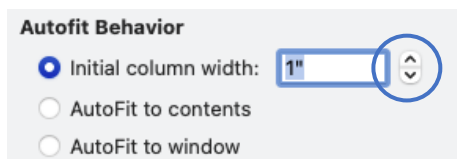
4. Click **Insert Table**. A window labeled **Insert Table** pops up.



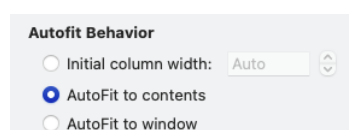
5. Under **Table Size**, adjust the number of columns and rows by clicking the down or up arrows.



6. Under **Autofit Behavior**, adjust the column width by clicking the down or up arrow.



7. Click **Autofit to contents** if you want the table size to automatically adjust its size according to what you type inside of it.



2.2 Results

Before

Time	Trial #			

2.2 Results

After

Time	Trial #			

8. Click **Autofit to window** to create a table that is wide as the document.

Autofit Behavior

☐ Initial column width: Auto

☐ AutoFit to contents

☒ AutoFit to window

2.2 Results

Time	Trial #			

Before

After

9. Click **Set as default for new tables** to create a default table with your customized sizes and autofit settings.

Insert Table

Table Size

Number of columns: 5

Number of rows: 4

Autofit Behavior

☐ Initial column width: Auto

☒ AutoFit to contents

☐ AutoFit to window

☒ Set as default for new tables

Cancel OK

10. Press **OK** when finished. The table appears in your document.

2.2 Results

Time	Trial #			

AutoFit to contents

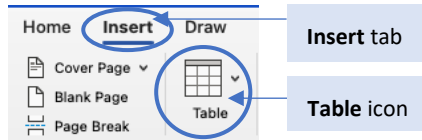
Initial column width 1"

AutoFit to window

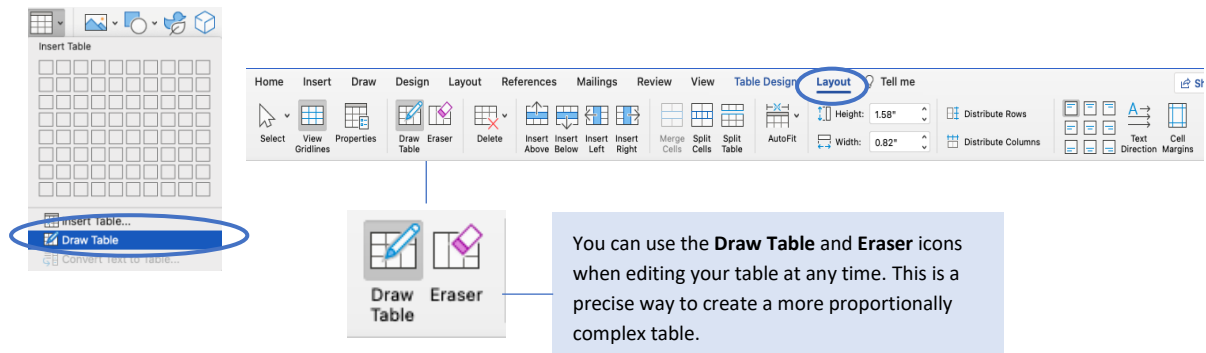
3.3 DRAWING A TABLE

Drawing a table is an efficient way to control the proportions of a table's rows and columns when they are not going to be equal. When writing a test report, this is helpful for creating complex data tables that contain multiple test variables. You can also start with a table created using another method, and then edit using the drawing tool.

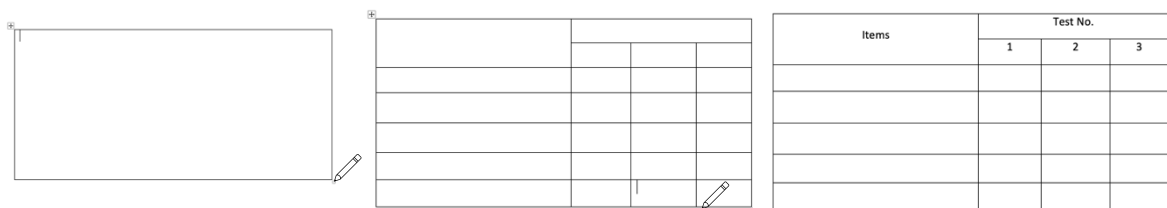
1. Click where you want to insert a table on your document.
2. Click the **Insert** tab.
3. Click **Table**. A drop-down menu appears.



4. Click **Draw Table**. Your cursor appears as a pencil icon and a new tab appears labeled **Layout**. This controls the layout of your table, which is different from the layout tab that controls the layout of



5. Draw your table by dragging your cursor. You can draw columns and rows by dragging diagonal, and you can draw lines by dragging vertical or horizontal.



3.4 FORMATTING A TABLE

You can finetune the size, proportions, and design of your table to ensure that the information in your table is being presented in the way that you want it to be. After creating your table and selecting it, two new tabs labeled **Table Design** and **Layout** appear in the top menu.

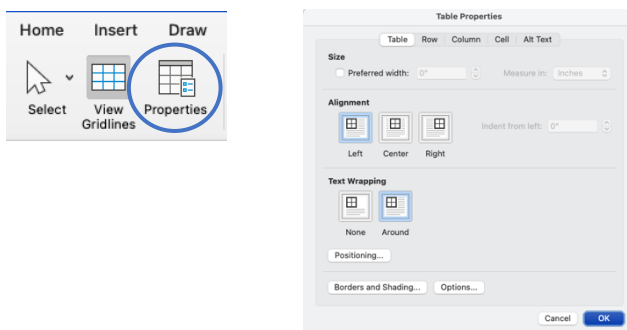
1. Click anywhere on your table to select it.
2. Click the **Layout** tab that appears after clicking your table.



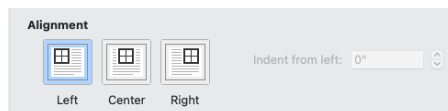
This Layout tab is used to format the layout of your table. This is different from the original layout tab that formats your whole page.

To adjust the alignment of a table

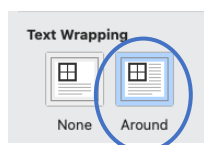
1. In the table **Layout** tab, click **Properties**. The **Table Properties** menu opens.



2. Under **Alignment**, choose one of the following:
 - Click **Left** to align the table to the left of your page.
 - Click **Center** to align the table to the center of your page.
 - Click **Right** to align the table to the right of your page.



3. Under **Text Wrapping**, click **Around** if you want text to wrap around your table.



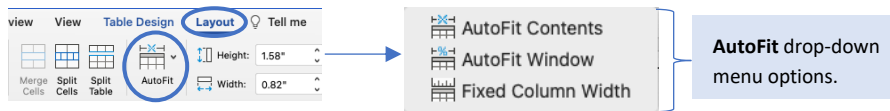
Items	Test No.		
	1	2	3

This table shows the results of three test runs done by Lorem ipsum dolor sit amet, has meis omnesque apparet ei, vel et sint omnis. Lucilius

expetendis mei cu, quo ne nisl porro scripserit. Id modus omnesque vim, ne albusci facilisi scriptorem mea. Ea quis nisl novum qui, ne adhuc praesent vim. Cu vim ancillae fabellas, at mea insolens concludaturque, eam at erant graecis. Ut usu purto partiendo. Quo ne voluptatum incorrupte, labitur suscipit mea ex.

To resize a table that you have already created

1. In the table Layout tab, click **AutoFit**. A drop-down menu appears.



2. Choose one of the following from the drop-down menu:
 - Click **AutoFit Contents** to resize the table cells to match the text typed inside of them.

Items	Test No.		
	1	2	3
Lorem ipsum dolor sit amet, has meis omnesque appareat ei, vel et sint omnis.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.

- Click **AutoFit Window** to resize the table to match the width of your window.

Before

Items	Test No.		
	1	2	3
Lorem ipsum dolor sit amet, has meis omnesque appareat ei, vel et sint omnis.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.

After

Items	Test No.		
	1	2	3
Lorem ipsum dolor sit amet, has meis omnesque appareat ei, vel et sint omnis.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.	Ea quis nisl novum qui, ne adhuc praesent vim.

- Click **Fixed Column Width** if you do not want AutoFit to automatically adjust the size of your table or column width.



When your table has a **Fixed Column Width**, use arrows next to **Height** and **Width** to control the height and width measurements of your table's columns and rows.

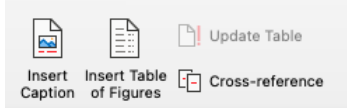
SECTION 4: CAPTIONING AND CROSS-REFERNCING ITEMS

Captioning items is an essential tool for guiding readers towards the key elements of your test reports. It is an efficient way to label a graph, table, chart, or other visual element and describe them throughout your document without getting too complicated with names and description. Captioning also allows you to cross-reference an item, which is convenient for longer documents. When you insert a cross-reference, it serves as a link that takes you to the referenced item, wherever it is in the document. This is convenient for writing test reports because you or the user can quickly jump back and forth between explanations of the item and the item itself.

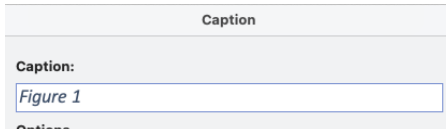
4.1 CAPTIONING AN ITEM

Captioning an item in your test report – such as a figure, chart, table, or graph – makes it easier to refer to them throughout your writing. It also makes it easier for readers to understand and connect your references.

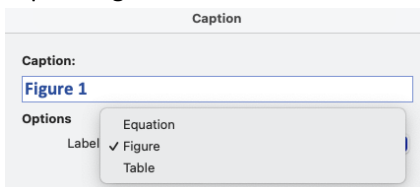
1. Click or select the item that you want to caption. This could be a figure, table, heading, etc.
2. In the **References** tab, click **Insert Caption**. A menu opens.



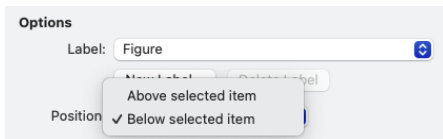
3. In the **Caption** box, type your caption.



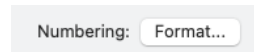
4. In the **Label** section, select the corresponding label. This depends on what type of item you are captioning.



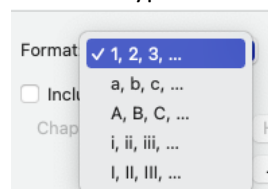
5. In the **Position** section, adjust the position of your caption if necessary.



6. In the **Numbering** section, click **Format** to change the numbering of your captions throughout your document. A menu opens.



7. Click the arrows next to **Format**. A drop-down menu appears.
8. Select the type of numbering you want your captions to follow.



9. When finished, click **OK**.



Figure 1

4.2 CROSS-REFERENCING AN ITEM

Cross-referencing an item creates a hyperlink in your text that brings you to the referenced item when the hyperlink is clicked. In your test report, this is a convenient way for both you and readers to quickly jump to the referenced item.

1. Make sure the item you are cross-referencing exists and is captioned.



Figure 1

2. On your document, click where you want to place your cross-reference.

The layout of Model 123xyz is shown in |

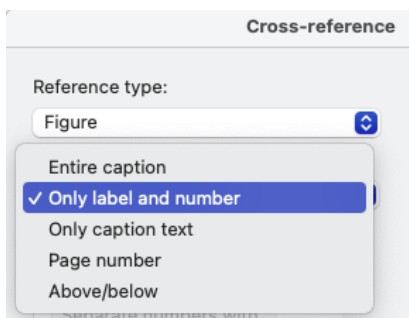
3. Click the **References** tab from the top menu.

4. Click **Cross-reference**. A menu appears.

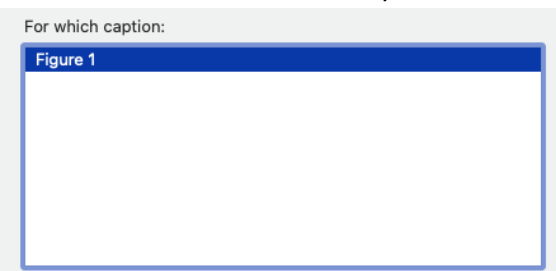


5. Under **Reference type**, select what reference you want to link to.

6. Under **Insert Reference** to, select the information you want inserted in the document.



7. Under **For which**, select the item you want to refer to.



8. Click the **Insert as hyperlink** check box to allow users to jump to the referenced item from the link.

9. Click **Insert** and then **Close**.

The layout of Model 123xyz is shown in Figure 1.

SECTION 5: USING FEATURES FOR COLLABORATION

Collaboration with other engineers is an important aspect of writing a test report for your company. Microsoft Word allows you and collaborators to share, edit, and comment on your document. This eases the writing and revising process because you and your colleagues can simultaneously work on the test report and collaborate virtually whenever necessary.

5.1 SHARING A DOCUMENT

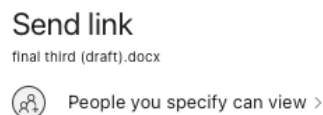
Sharing your test report with others is essential to collaborating with your colleagues, whether they are contributing to the word or simply checking it over. Microsoft Word allows you to share your document by email, by sending a link to the document, or by sending a copy of the document. It also allows you to specify who can see your document and how recipients can interact with it.

TO SHARE BY EMAIL

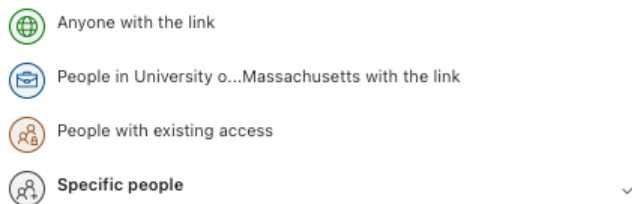
1. In the **Home** tab, click **Share** from the top menu. A drop-down menu appears.



2. Click **People you specify can view** to change who the link works for.



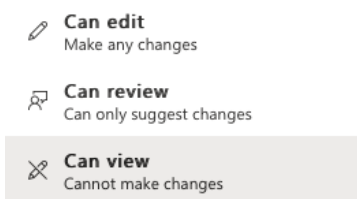
3. Select the preferred option.



4. Under **Other settings**, click the down arrow. A menu appears.



5. Select how you want the recipient to interact the document. You can allow them to edit, review, or view the document.



6. If you do not want the recipients cannot download the document, click **Block download**.



7. Click **Apply**.

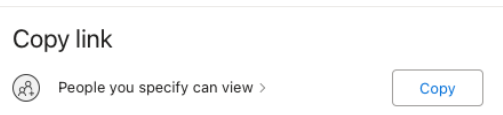
8. Where it says **To: Name, group or email**, type who you want to send the document to.



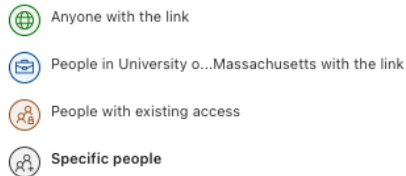
9. Click on the space near **Message** to type a message to the recipient.
10. Click **Send**.

TO SHARE USING A LINK

1. In the **Home** tab, click **Share** from the top menu. A drop-down menu appears.
2. Under **Copy Link**, click **People you specify can view** to change who the link works for.



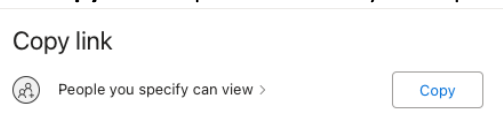
3. Select the preferred option.



4. If you do not want the recipients cannot download the document, click **Block download**.

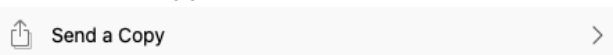


5. Click **Apply**.
6. Click **Copy**. This copies the link to your Clipboard. You can then paste the link somewhere else.

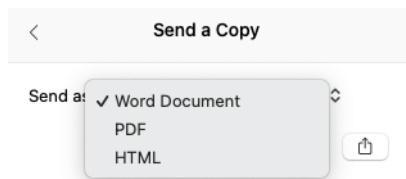


TO SEND A COPY OF YOUR DOCUMENT

1. In the **Home** tab, click **Share** from the top menu. A drop-down menu appears.
2. Click **Send a Copy**.



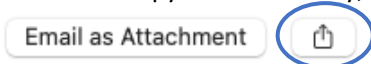
3. In the **Send as** box, select which format you would like to send your document as.



4. To Email the document, click **Email as attachment**. This automatically redirects you to your email where you can address your recipient and send it.



5. To send the copy a different way, click the icon next to **Email as attachment**.

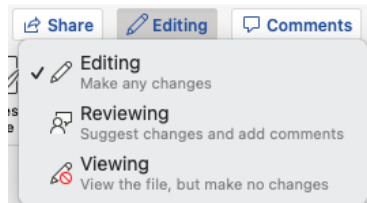


6. Select how you would like to send the copy. This redirects you to your chosen platform where you can send the copy as desired.

5.2 EDITING AND COMMENTING ON A DOCUMENT

The **Editing** feature is useful during the end stages of writing your test report. It allows you or collaborators to suggest changes and add comments without changing the document itself. The **Commenting** feature is a convenient way to keep editing notes all in one place.

1. In the **Home** tab, click **Editing** from the top menu. A drop-down menu appears.

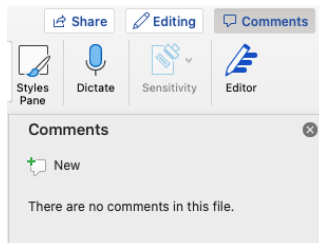


2. Click **Reviewing** to suggest changes and add comments.
3. Edit your document normally to suggest changes. The suggested change appears on your document and the original work appears on the right-side of your document.

Figure 1 shows the layout of Model 123xyz.

Lauren Saloio 5 minutes ago
Deleted: The layout of Model 123xyz is shown in Figure 1.

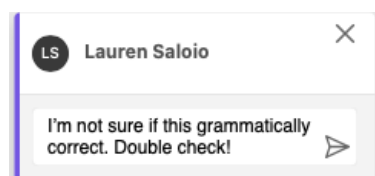
4. In the **Home** tab, click **Comments** from the top menu. A side-menu appears. This is where you can see all the comments made on your document.



5. Select the text on your document that you want to make a comment on.
6. On the side-menu under **Comments**, click **New**. If you do not have the Comments side-menu open, you can also right click the text that you want to comment on and select **New comment** from the pop-up menu.



7. Type your comment in the comment box.
8. Click the send icon to post your comment.



Please note that blank pages were intentionally inserted for printing purposes.

COLOPHON

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