

Creating Long Documents in Word



Instructional Services at KU Libraries
A Division of Information Services
www.lib.ku.edu/instruction

Abstract: This document covers features in Microsoft Word that are especially useful for writers creating longer documents (such as dissertations, monographs, long reports, and full-length manuals). These features include footnotes and endnotes; section breaks; special page numbering; automatically generated tables of contents, tables of figures, and indices; and concordance files for use with indices.

Contents

Introduction	3
Prerequisites	3
Related Training Available from Instructional Services.....	3
Definitions	3
Before You Start: Planning Your Document.....	4
Limits of Word	4
Setting Up Your Document	5
Margins	5
Styles	6
Page Numbers	10

Instructional Services

Creating Long Documents in Word

Using Section Breaks.....	13
Viewing Section Breaks	14
Deleting Section Breaks.....	15
Footnotes and Endnotes.....	16
Using EndNote and Word	17
Cross-References	17
Generating a Table of Contents.....	19
Updating a Table of Contents	21
Generating a Table of Figures	21
Labeling Images with Captions	22
Building the Table of Figures	23
Building an Index.....	24
Manually Marking Index Entries	24
Using Concordance Files and Automark.....	26
Generating the Index.....	27
Getting Additional Help	28

Introduction

This document focuses on features of Word that are specifically designed for longer documents, and also review good strategies for setting up and formatting longer documents, to save attendees time and trouble during the drafting process.

Prerequisites

This workshop assumes a basic working knowledge of Microsoft Word. Attendees should be familiar with typing in and applying basic formatting to text, selecting text (by clicking and dragging), working with toolbars and menus, and saving (and retrieving) Word files.

For those just getting started with Word, the Instructional Services workshops **Word: Everyday Tasks** and **Word: Document Enhancement Features** will give you a great foundation for this workshop.

Related Training Available from Instructional Services

All workshops offered by Instructional Services are free to KU students, staff, faculty, and [approved affiliates](#).

To learn more about or register for workshops, receive automatic announcements of upcoming workshops, and track workshops you've registered for and have attended, visit www.lib.ku.edu/instruction/workshops. For further workshop related questions, please email training@ku.edu.

Definitions

Term	Definition
Automark	A feature available in Word that automatically marks index entry items in the body of the text, using terms from a separate concordance file the author has created.
Bookmark	In Word, a bookmark is a nonprinting element that labels a section of the document. A bookmark can be used when manually marking an index item to create an index entry that spans multiple pages.
Concordance	A separate Word document containing a two-column table with information on terms to be included in the index. The author creates the concordance, and uses it to automatically mark index items in the body of the main document.
"Default Paragraph Font" style	A character-level (rather than the normal paragraph-level) style automatically generated by Word. This style cannot be modified.

Term	Definition
"Normal" style	A paragraph-level style automatically generated by Word. Changes made to this style will affect all of the styles in the document that are based on "Normal" style (usually, this is most or all of the styles in the document).
Section break	A nonprinting element that enables you to make multiple sections in a document. These sections can have different page orientations, margin settings, page numbering styles, and headers/footers.

Before You Start: Planning Your Document

There are some important questions you need to answer before you get started:

Is there a specific format that you must follow in this document? For dissertations and thesis papers, check with your school or department to determine the appropriate format. For papers or manuscripts submitted for publication, check with the editors of the journal or publisher. If your department or publisher has a Word template that follows these formatting instructions, using that template can often save you time and trouble.

How long will your document be? See "Limits of Word," page 4, for document size guidelines.

Will your document include figures, charts, or other images? Where will you get these images? Charts and graphs can be generated by statistical analysis tools; photographs and slides can be scanned; other images can be created by a variety of graphics applications.

How comfortable are you with Word? If you find yourself wrestling with Word when writing shorter papers, you may want to become more familiar with it before tackling a longer document. Instructional Services offers scheduled workshops Word, free to all KU students, faculty, and staff. One-on-one help and consultation is also available to KU faculty and staff. Training and help is geared toward novice and advanced users alike.

Limits of Word

Word is a word processing application; it was designed to be a good general program to use for letters, memos, reports, and papers. It can also be used for longer documents, like theses, dissertations, and monographs—but with some limitations.

Authors who are creating large documents (100 pages or more) with a large number of graphics (one or more on almost every page) may experience problems with Word (especially Word 97 or earlier), including problems with graphics and problems saving and launching the file. Authors working on documents that are several hundreds of pages long may also experience problems with their Word files.

If your document will be longer than 100 pages (with many graphics) or 200 pages (with few graphics), you might consider these alternatives to avoid problems:

- Save each chapter as an individual Word file. You can set up page numbering by chapter (e.g., 2-28 for Chapter 2, page 28), or set up continuous numbering. See

Instructional Services

Creating Long Documents in Word

“Page Numbers” on page 10 for instructions on setting up continuous or chapter-based page numbering.

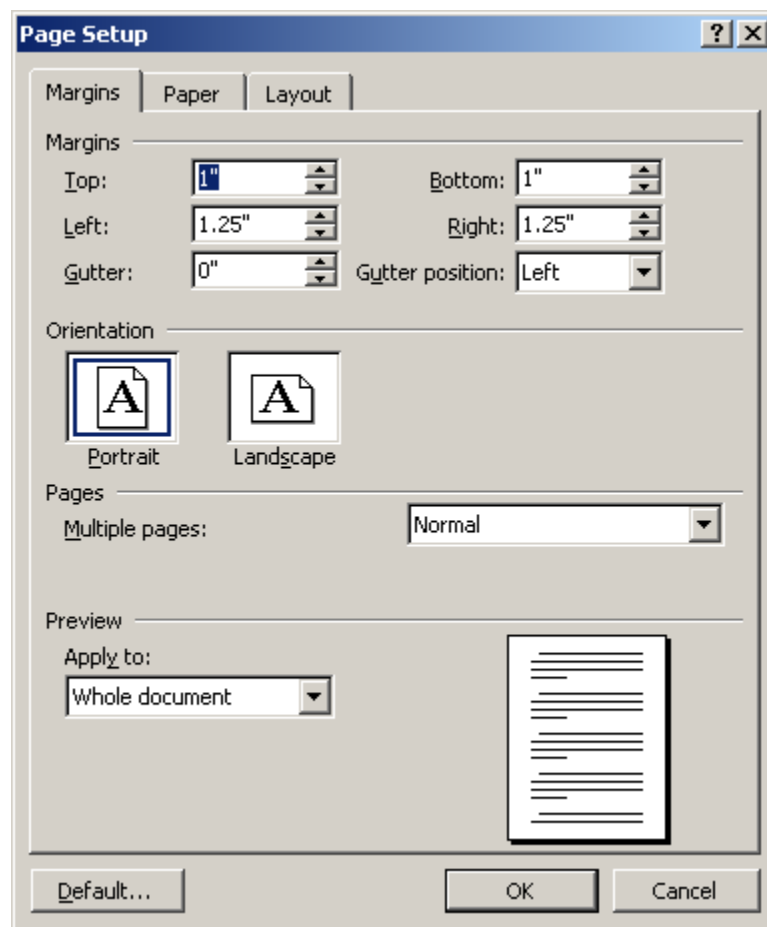
- Use a desktop publishing program such as InDesign, rather than (or in addition to) a word processing program. These programs are designed to produce longer and more layout-intensive documents, such as books and magazines.

Setting Up Your Document

Margins

To set the margins of your paper,

1. Click the **File** menu and click **Page Setup**.



The Page Setup dialog box

2. In the Page Setup dialog box, click the **Margin** tab to display margin settings (as shown above). Set the margins according to the instructions you’ve received from your department, school, or editor. **If your document will have multiple columns** on a single page, set the **Gutter** margin—that will determine the amount of space between columns.

Instructional Services

Creating Long Documents in Word

3. Click **OK** to set the margins. **These margin settings will be applied to the entire document.**

Note: If you need to set special margins for only one page or section of your document, insert **section breaks** between that section and the rest of the document. Then, with your cursor blinking somewhere in that special section of the document, follow steps 1 through 3 above; those margin settings will be applied only to that section of the document.

Styles

Styles are sets of formatting definitions that are used to differentiate different types of paragraphs. Some styles are automatically included in your document in Word (such as “Normal,” “Default Paragraph Font,” and “Heading 1”); you may want to modify these styles, or create additional ones to suit your needs.

Styles are Important in Long Documents

When used systematically, styles can save you a lot of time by allowing you to set the formatting for a certain type of paragraph (such as a regular body paragraph, a heading, or a caption) in one place, then apply that formatting to all the paragraphs of that type in the document.

Even more important, if you decide later that you want to change the formatting of one type of paragraph (for example, to make the font size 11 points instead of 10), all you need to do is modify that one style definition; all the paragraphs with that style will be automatically updated.

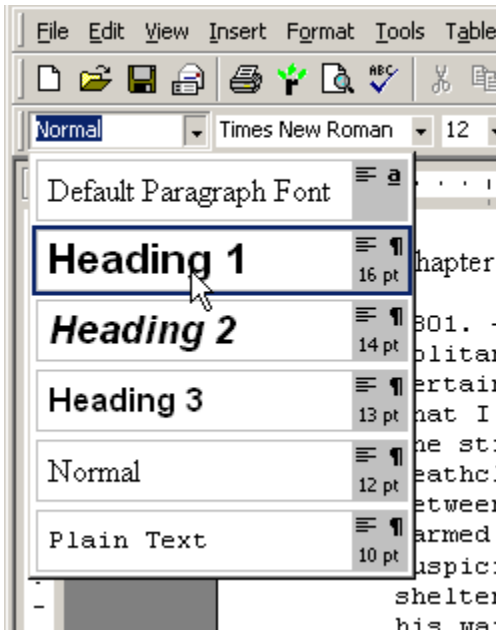
Finally, using styles enables you to use many other timesaving features in Word, such as automatically generated tables of contents, tables of figures, and indices.

Applying Styles

To apply a style to a paragraph,

1. Place your cursor somewhere in that paragraph, by clicking on the paragraph, or using the arrow keys on your keyboard.
2. Click the Style dropdown box at the top left of your screen. This box is to the left of the Font dropdown box, and displays the current style of the paragraph (such as “Normal”).

3. Select the style you want to apply from the dropdown list, as shown below.

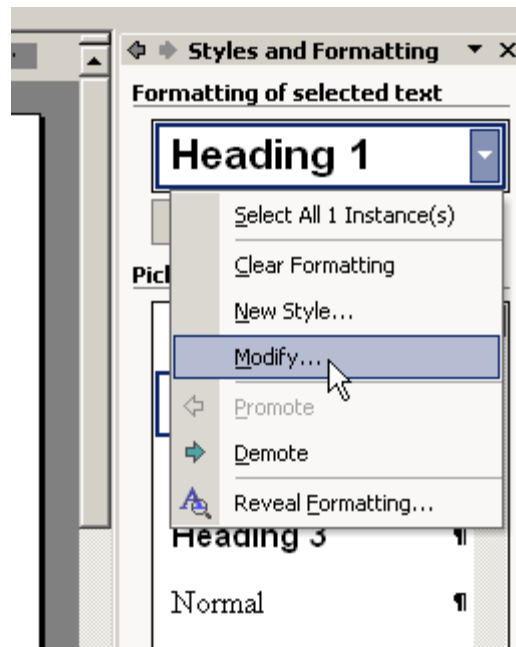


Note: To apply a style to multiple paragraphs, click and drag to select the paragraphs, then follow steps 2 and 3.

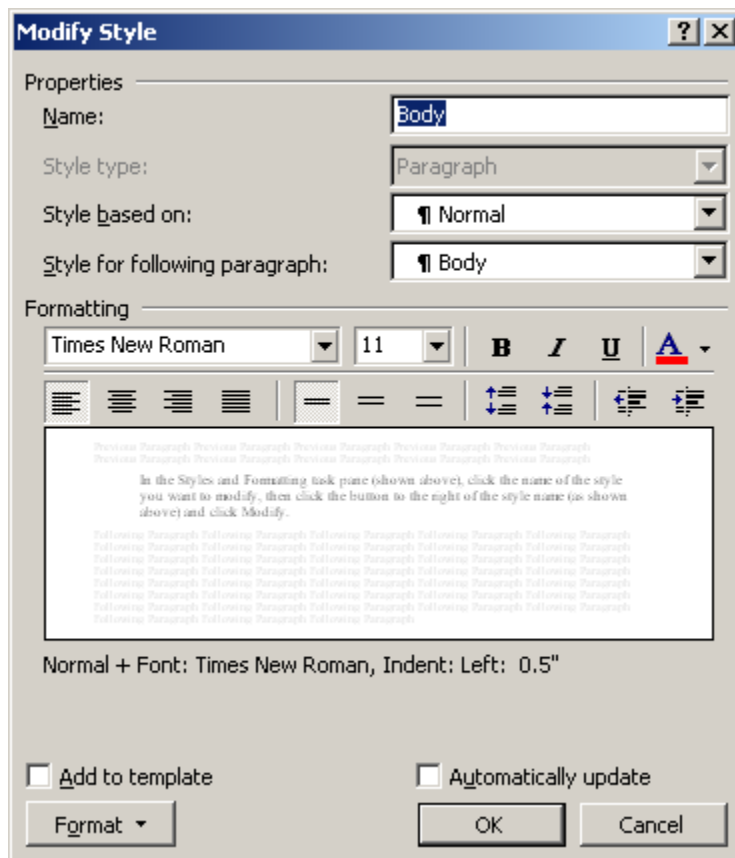
Modifying Existing Styles

To change the formatting for a style,

1. Click the **Format** menu and click **Styles and Formatting**.



2. In the **Styles and Formatting** task pane on the right side of the Word window, click the name of the style you want to modify, then click the button to the right of the style name (as shown above) and click **Modify**.



3. In the Modify Style dialog box (shown above), click the **Format** button and choose the option you want to change.
4. Make the desired formatting changes, then click **OK** twice to return to the Style dialog box.
5. In the Style dialog box, click **Apply** to apply those changes to the selected paragraph and close the box.

Warning: Changes to the **Normal** style will affect all heading styles and any other style based on Normal. In most cases, it's better to create a new style based on Normal, then make changes to it, rather than changing Normal itself.

Creating New Styles

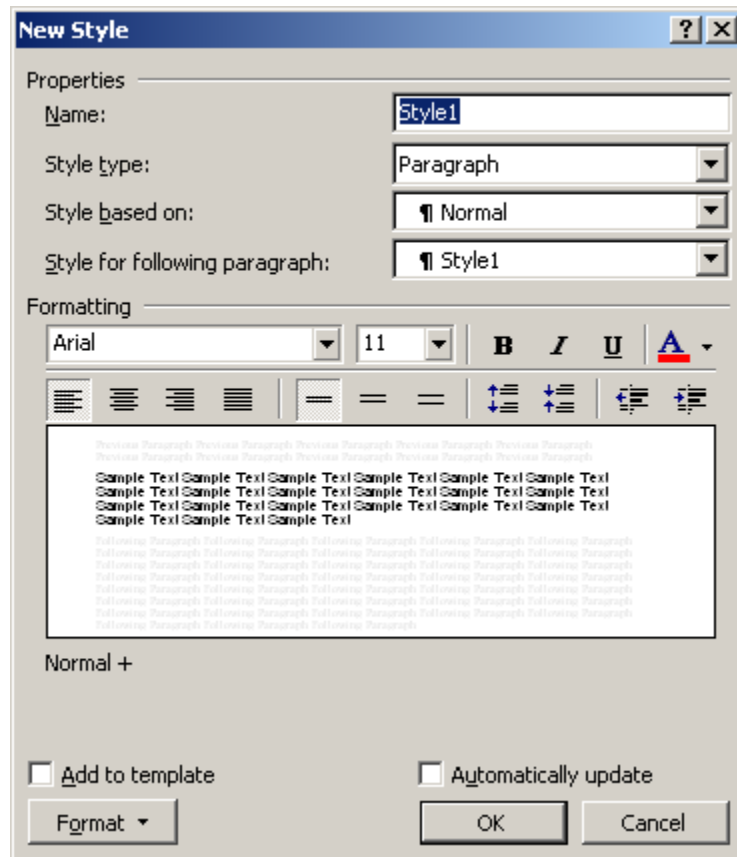
To create a new style, such as a “Body” style,

1. Click the **Format** menu and click **Styles and Formatting**.

Instructional Services

Creating Long Documents in Word

- In the **Styles and Formatting** task pane (on the right side of the Word window), click the **New Style** button..



- In the **New Style** dialog box (shown above), type the name of your new style under Name, and choose a style on which it will be based (Normal is the default).
- Choose a style for the “following paragraph” (the default is to make the next paragraph the same style). This style will be applied when you type in a paragraph using this style, and press enter to create a new paragraph; that new paragraph is the “following paragraph.”
- If you want this style to be available for use in new documents you create, check the **Add to template** checkbox.’
- Click the **Format** menu and choose the option you want to change. When you’re finished making changes, click **OK** to return to the Style dialog box.
- At the Style dialog box, click **Apply** to apply your new style to the current paragraph.

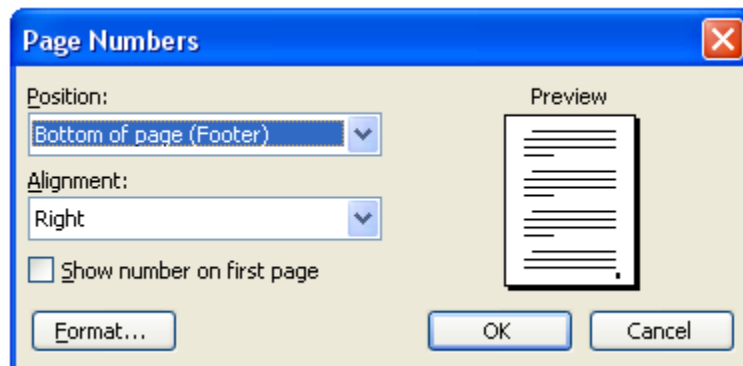
Page Numbers

Note: Consult the formatting instructions from your school, department, or publication to determine the appropriate style of page numbering for your document.

Basic Page Numbering

To add page numbers to a document,

1. Click the **Insert** menu, and click **Page Numbers**.



2. In the Page Numbers dialog box (shown above), select where you want the page numbers to go (“Position” and “Alignment”), and whether to show the page number on the first page.
3. If you want to change the numbering style (the default is Arabic: 1, 2, 3), click the **Format** button, make the desired changes, and click OK to return to the Page Numbers dialog box. Otherwise, skip to step 4.
4. Click **OK** to insert the page numbers and return to the document.
5. To change the font, font size, and other text properties of the page numbers, use the font formatting toolbar while the page numbers footer is selected. (Double click the page numbers to select this area.)

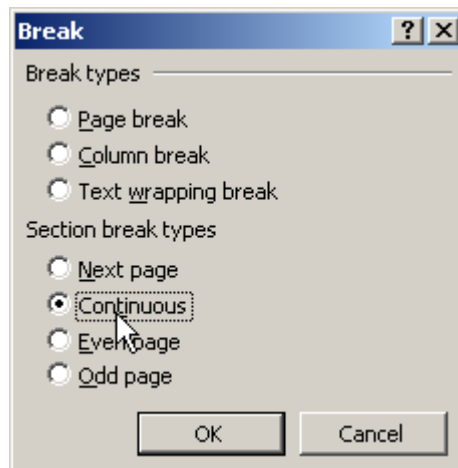
Using Different Numbering Styles within One Document

Often longer documents require different page numbering styles within the same document—for example, lower-case Roman numerals (i, ii, iii) for the front matter, and Arabic numerals (1, 2, 3) for the body of the document.

To do this, first follow the directions for basic page numbering from the previous section of this document.

Next, insert **section breaks** between the parts of the document that require different page numbering. To insert a section break,

1. Click the **Insert** menu and click **Break**.



2. In the Break dialog box, choose the type of section break you want. “Continuous” inserts a section break that does not change the current page breaks, while “Next page,” “Even page,” and “Odd page” causes the following section of text to start at the next page, the next even-numbered page, or the next odd-numbered page, respectively.
3. Click **OK** to insert the section break. When looking at your document in Normal view, this break will appear as a double dotted line (but will not be printed in the document). In Print Layout view, this section break will not be visible.

Now you can change the page numbering style for each section by following these steps:

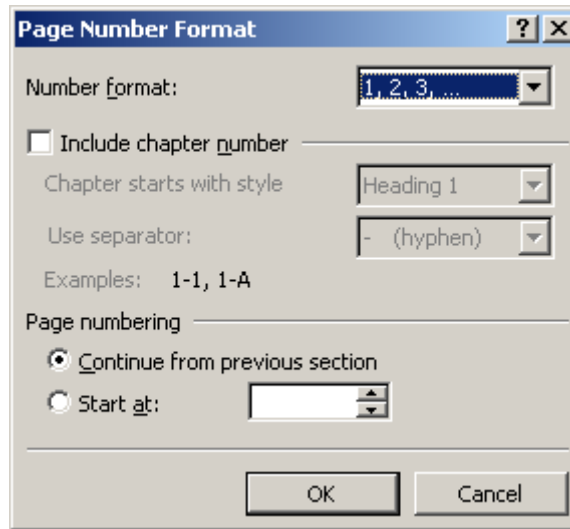
1. Place your cursor in the text of the first section.
2. Click the **View** menu, then click **Header and Footer**.
3. In the Header and Footer toolbar, click the Format Page Number button, as shown:



Instructional Services

Creating Long Documents in Word

4. In the Page Number Format dialog box, change the number format. Click **OK** to make the change.

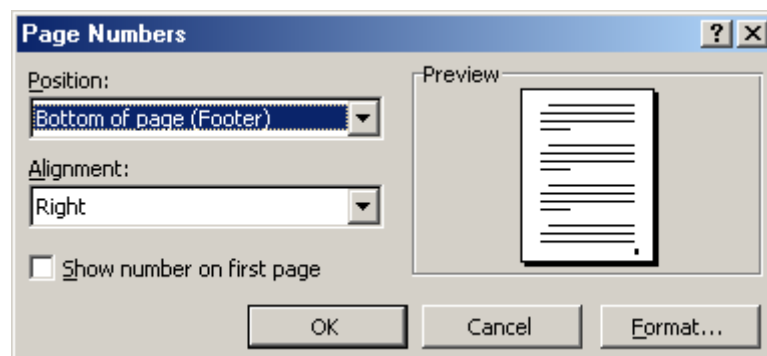


5. Place your cursor in the next section of text.
6. Repeat steps 2 through 4 for all sections of the text. **To restart page numbering** for a section, at step 4, click “Start at” and type “1” in the Page Number Format dialog box.

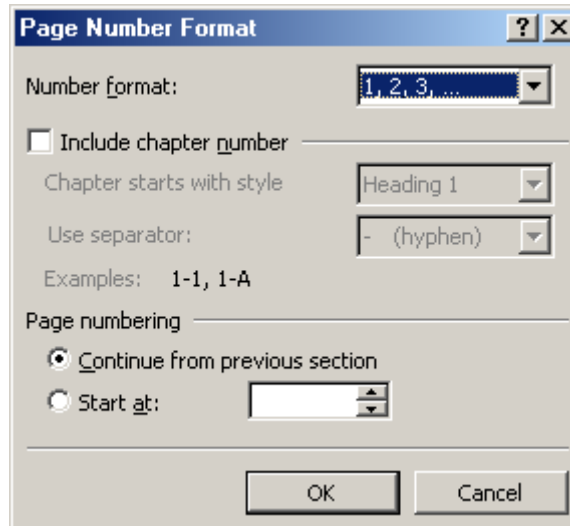
Continuous Numbering Across Multiple Documents

To create page numbers that run continuously across multiple files (i.e., the first file contains pages 1-23 of the document, the second pages 24-59, and so on):

1. Insert page numbers as you normally would in all documents, and finish writing the document.
2. In the file containing the first part of the document, scroll to the end and note the number of the last page.
3. In the file containing the second part of the document, click the **Insert** menu, and click **Page Numbers**.



4. In the Page Numbers dialog box, click the **Format** button.



5. In the Page Number Format dialog box, click the **Start at** radio button (under “Page Numbering,” shown above), and type the appropriate number. Click **OK** to make this change.
6. **Important:** In the **Page Numbers** dialog box, click **Cancel** to return to your document. This allows you to change where the numbering starts without changing other page number settings.

Chapter-based Numbering

To create chapter-based numbering:

1. Click the **Insert** menu and click **Page Numbers**.
2. In the Page Numbers dialog box, click the **Format** button.
3. In the Page Number Format dialog box, check the “Include chapter number” checkbox, select the style used for chapter titles (such as Heading 1), and select the separator (what character will separate the chapter number from the page number). Click **OK** to make this change.
4. **Important:** In the **Page Numbers** dialog box, click **Cancel** to return to your document. This allows you to change the number formatting without changing other page number settings.

Using Section Breaks

Section breaks can be used in long documents in several ways:

- To create sections with different **page numbering styles** (see “Using Different Numbering Styles within One Document” on page 11 for instructions);
- To create sections that have a different **page setup** (for example, a one-page section that has landscape instead of portrait layout, or a series of pages that have different margins or page sizes compared to the rest of the document);

Instructional Services

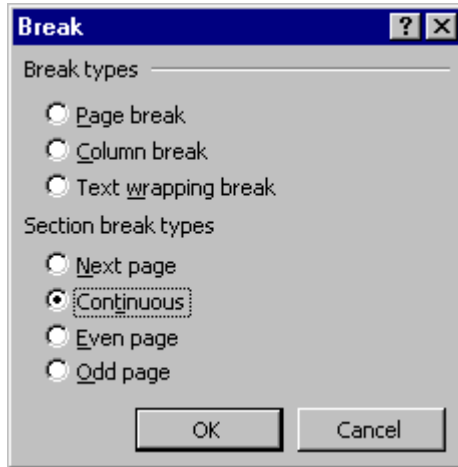
Creating Long Documents in Word

- To create sections that have **different headers and/or footers** (for example, a book manuscript in which the title of the current chapter appears in the header).
- To create pages with a **combination layout**—part normal paragraph style and part multi-column, for instance.

Whenever a section break is inserted, Word allows you to change the formatting for the next section without affecting the previous one.

To insert a section break,

1. Click the **Insert** menu, and click **Break....**



2. In the Break dialog box (shown above), choose the **type** of break needed. *Word* has four to choose from:

Next Page	This inserts a break and starts the new section on the next page.
Continuous	Allows for you to insert a break but continue on the same page as the previous section.
Even Page	Inserts a section break and starts a new section on the next even-numbered page (2, 4, 6, and so on).
Odd Page	Inserts a section break and starts a new section on the next odd-numbered page (3, 5, 7, and so on).

3. Click to choose the section break type you want, then click **OK** to insert the section break.

Viewing Section Breaks

Section breaks are **non-printing** characters. That means that in certain viewing modes, you won't be able to see where the section breaks occur. To see the sections breaks you've added to your document, do one of these two things:

Change to the **Normal** view by clicking the **View** menu, then clicking **Normal**.

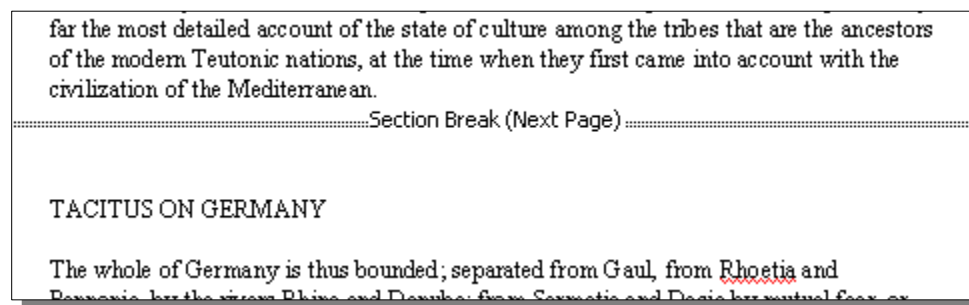
OR

Display non-printing characters in your document by clicking the ¶ button (Show/Hide ¶) on the Standard toolbar.

Deleting Section Breaks

Note: Deleting a section break will cause the preceding section to take on the formatting and setup of the following section. For instance, if you have a portrait-oriented section, followed by a landscape-oriented section, and you delete the section break between them, **both sections will become landscape-oriented.**

To remove a section break, first **change your view** so that you can see the section breaks (see previous section for instructions). In **Normal** view, a section break looks like this:

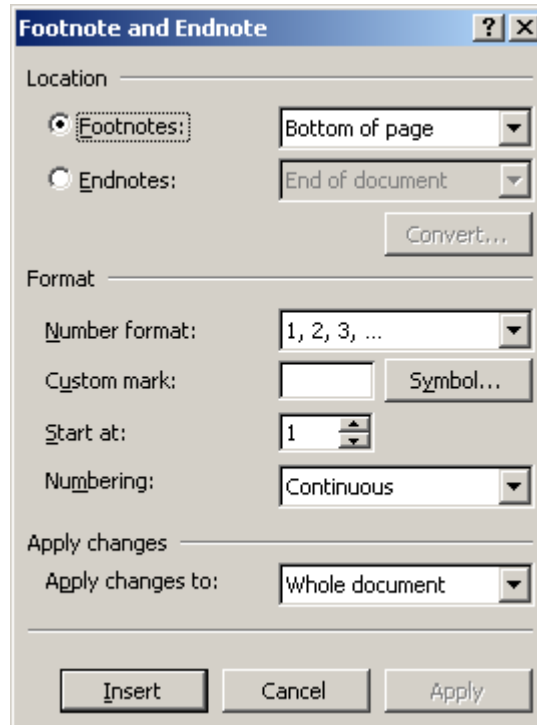


To remove a section break, click your cursor to the **left** of the words **Section Break**, and press the **Delete** key.

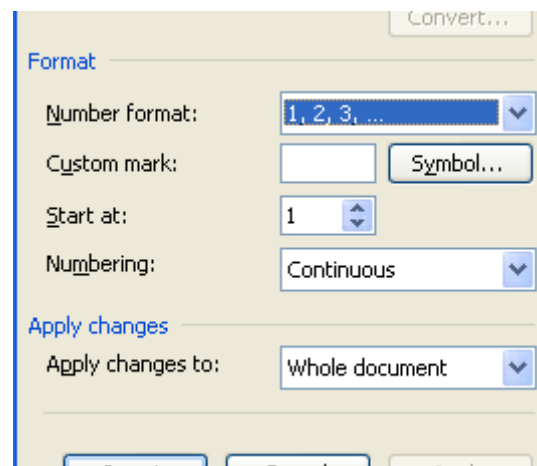
Footnotes and Endnotes

To insert a footnote or endnote in Word (using Word's built-in features):

1. Click the **Insert** menu, click the **Reference** sub-menu, then click **Footnote**.



2. Choose Footnote or Endnote (your document can contain either, or a combination of both).
3. The default numbering scheme for footnotes is Arabic (1, 2, 3); the default for endnotes is lower-case Roman (i, ii, iii). To change the numbering style, use the Format section of the Insert Footnote dialog box. (if you do not need to change the numbering style, skip to step 4, below).



4. Make the desired changes and click **OK** to insert the footnote or endnote.

5. Word will create the note marker and place the cursor in the note area. Type in the note text, then scroll up to return to the body of your document.

Using EndNote and Word

Many researchers choose to use a specialized bibliographic database program, such as EndNote, to keep track of their references. EndNote has a feature called Cite While You Write, which works with Microsoft Word to insert citations and format them automatically according to the style you select (such as APA, MLA, Chicago, and many more).

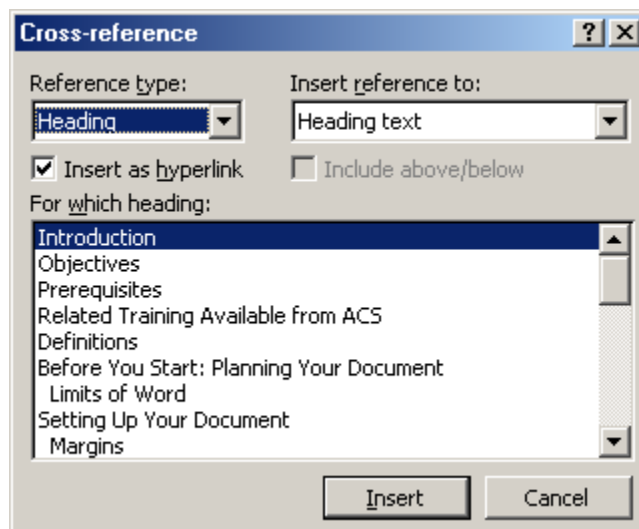
Instructional Services offers training on EndNote to KU students, faculty, staff, and approved affiliates. To find out more, visit <http://www.infotraining.ku.edu/>

Cross-References

Cross-references allow you to point readers to other places of interest within your document (“See Chapter 5 on page 49 for information,” for example). Cross-references can be done manually, but must be rechecked whenever the document changes. Automated cross-references will be updated automatically if the page number or text of the item changes.

To insert an automated cross-reference:

1. Write the section of the document to which you’ll be referring. (For instance, if you are referring the reader to Chapter 10, make sure you’ve written Chapter 10, or at least have a heading for it in your document.)
2. Click your cursor at the place in the text where you’d like to insert the cross-reference. Type a lead-in to the reference, such as “For instructions on numbering pages, see” (or some such).
3. Click the **Insert** menu, click the **Reference** sub-menu, then click **Cross-reference**.



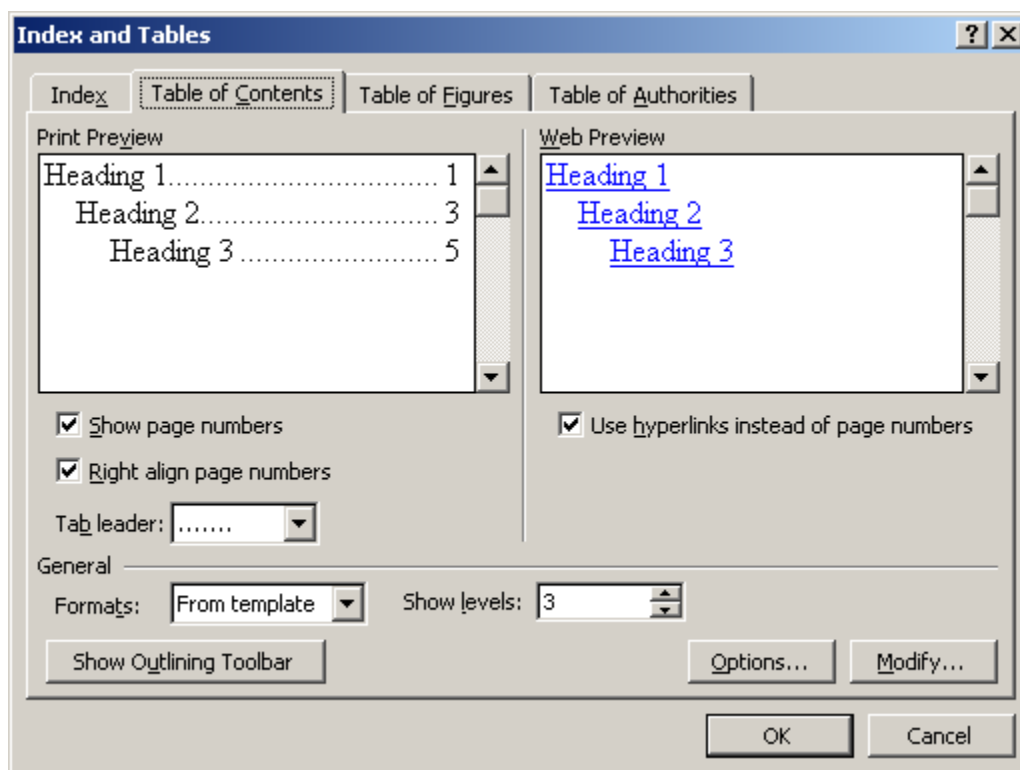
4. In the Cross-reference dialog box (shown above), choose the **reference type** to which you are referring. For example, if you want to refer the reader to a chapter heading, choose **Heading**.
5. Under **Insert reference to**, choose the text you will be inserting in your cross-reference. Often this is the text of the item (such as the heading text) or the page number.
6. Under **For which**, select the specific item to which you want to refer (such as “Introduction,” or “Objectives” in the example above).
7. Click the **Insert** button to insert the reference.
8. If you want to insert additional text for this cross-reference, such as a page number, repeat steps 5 through 7. Otherwise, click the **Close** button.

Generating a Table of Contents

Note: Word can generate a table of contents automatically—but in order for this feature to work, you need to format the document headings using special **paragraph styles**. For more information on using styles, see “Styles” on page 6. **Error! Bookmark not defined.**

To generate a table of contents:

1. Place your cursor where you'd like to insert the table of contents.
2. Click the **Insert** menu, click the **Reference** sub-menu, then click **Index and Tables**.
3. In the Index and Tables dialog box, click the **Table of Contents** tab (as shown below).

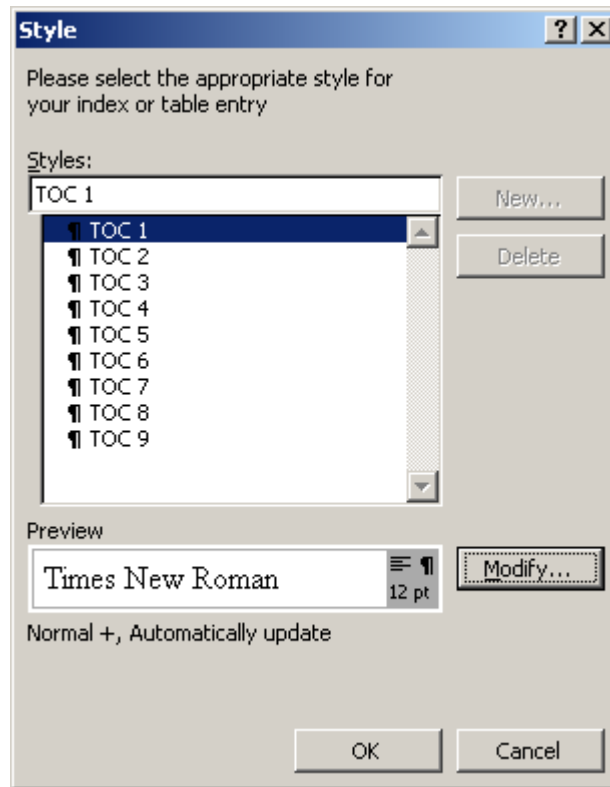


4. In **Formats**, choose the style of table you wish to create. Changing the format will change the print and web preview shown in the dialog box.
5. In **Show levels**, choose the levels of the document headings you would you like to include in the table of contents. For example, if you want to include only main chapter headings, choose 1; if you want to include four levels of headings, choose 4.

Instructional Services

Creating Long Documents in Word

6. If you want to modify the way table of contents entries will appear, click the **Modify** button. Otherwise, skip to step 8.



7. Choose the level you want to modify (TOC 1 for Heading 1 table of contents entries, TOC 2 for Heading 2, and so on), and click the **Modify** button. Change the style as you would any other paragraph style (for details, see “Modifying Existing Styles,” page 7). Click **OK** to accept those changes. **Repeat for all TOC styles you want to modify.**
8. At the Index and Tables dialog box, click **OK** to insert the table of contents.

Updating a Table of Contents

When you add a section to your document, or add pages to a section, you will need to update the table of contents. To do this,

1. **Right-click** on the table of contents.
2. In the right-click menu, choose **Update Field**. The Update Table of Contents dialog box will be displayed (as shown below).



3. Choose to update page numbers only (if you haven't added or changed any headings in your document), **or** to update the entire table (if you've added headings, changed heading text, or changed the order of the headings within your document). Then click **OK**.

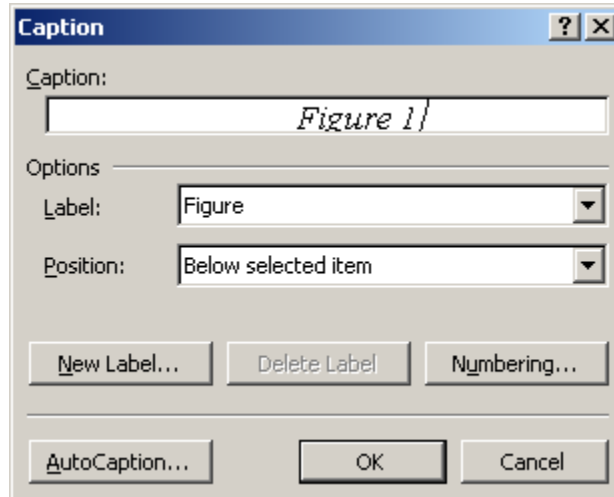
The table of contents will be rebuilt to reflect any changes or additions to your document.

Generating a Table of Figures

Generating a table of figures is a two-step process. First, you must label all of your figures with captions; these captions must either have a specific caption style you've created applied to them, **OR** must be created using the Insert/Caption feature of Word. The instructions provided here use the Insert/Caption feature.

Labeling Images with Captions

1. Insert the picture, graph, table, or other image in your document.
2. Click the **Insert** menu, click the **Reference** sub-menu, then click **Caption**.

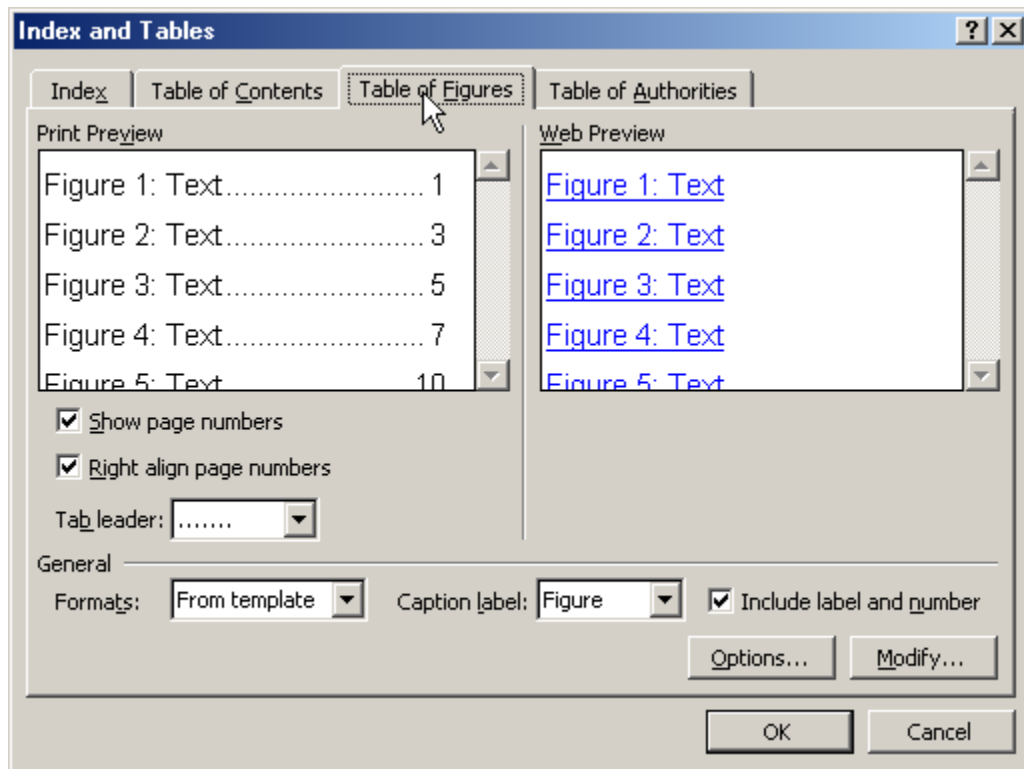


3. Word adds a default label to your caption (“*Figure 1*” in the example above). If you have additional text to add, type it in **to the right** of that label (you will be able to delete the default label later).
4. If you like, choose a different **label** for your caption, such as Equation or Table. If you want a different label (such as “Illustration,” for instance), click the **New Label...** button, type in the label you want for the caption, then click **OK**.
5. Next choose the **position** of the caption (consult the formatting instructions from your school, department, or publication to determine the appropriate location for captions).
6. Click **OK** to insert the caption paragraph. If you want to delete the default label text, you can do so now.
7. Repeat this process for each figure in your document.

Building the Table of Figures

Once you've labeled all of the images in your document, you can generate the table of figures:

1. Place your cursor where you want to create the table of figures. Click the **Insert** menu, click the **Reference** sub-menu, then click **Index and Tables**.
2. In the Index and Tables dialog box, click the **Table of Figures** tab, as shown:



3. Choose the format (style) of table, the label of the captions you wish to include (Equation, Figure, or Table), and whether to include the label and number of the captions (for example, "Figure 1"), or just the text of the captions themselves.
4. Click **OK** to insert the table of figures.

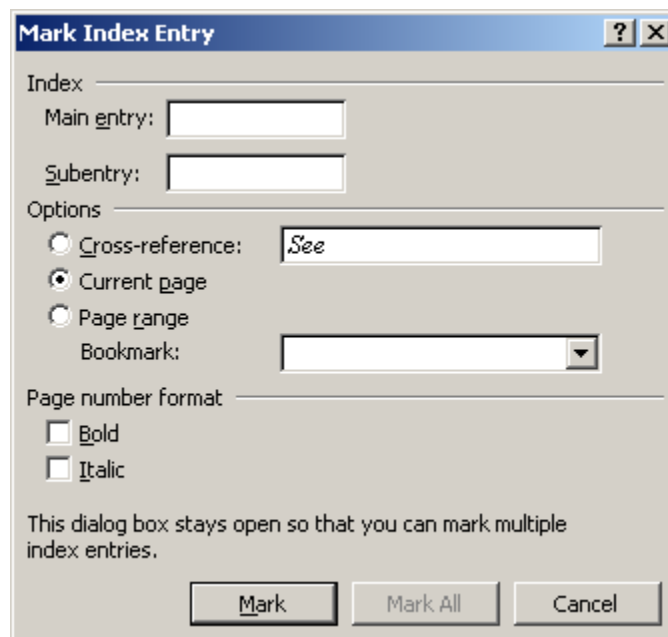
Building an Index

There are two ways to use Word's indexing feature. The first is to mark each item in your document that will be included in the index; you can mark a single word, a phrase, or a large section of the text this way. The second way to index is to create a separate concordance file, containing all the terms that you want to mark as index, and use it to automatically mark index items.

Manually Marking Index Entries

To mark an index item manually,

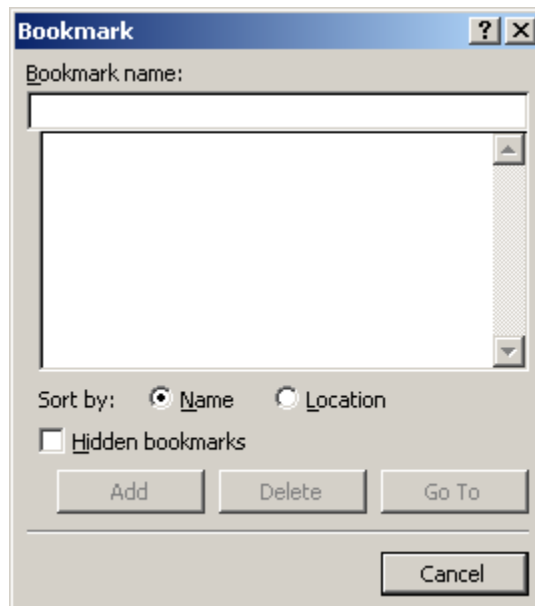
1. Place your cursor where you want to insert the index mark, and press Alt+Shift+x.



2. In the Mark Index Entry dialog box (shown above), type in the text you want for the main entry, and the sub-entry, if necessary. If you want to make this a cross-reference to another index entry, click the "Cross-reference" radio button and type in the text you want to appear (for example, "See genetic testing").
3. Click **Mark** to mark the entry, and click **Close** to return to the document.

To mark items that span several pages:

1. Click and drag to highlight the section of text you want to mark.
2. Click the **Insert** menu, then click **Bookmark**.



3. Type in a name for the bookmark and click **Add**.
4. Click your cursor at the end of the text you just bookmarked.
5. Press Alt+Shift+x to mark an index entry, and enter the name of the main entry and sub-entry (if necessary).
6. Click the “Page range bookmark” radio button, and select the bookmark you just created from the drop-down list to the right.
7. Click **Mark** to mark the entry, then **Close**.

Viewing and Editing Index Entries

Word adds index entries as **non-printing** characters, embedded in the document.

To view and edit entries, click the “Show/Hide ¶” button (¶) on the Standard toolbar. Index entries will display in curly brackets { } and will contain the code “XE” (short for “indeX Entry”), as shown below:

nations·and·kingdoms·there,·such·as·the·
The·Rhine·{ XE·"rivers:Rhine"·}·rising·in·
rocky·and·perpendicular,·after·a·small·wi

Change the reference by retyping the text in quotations. The text to the **left** of the colon : is the **main entry**; text to the **right** of the colon is the **sub-entry**.

Click the “Show/Hide ¶” button again to hide non-printing characters.

Using Concordance Files and Automark

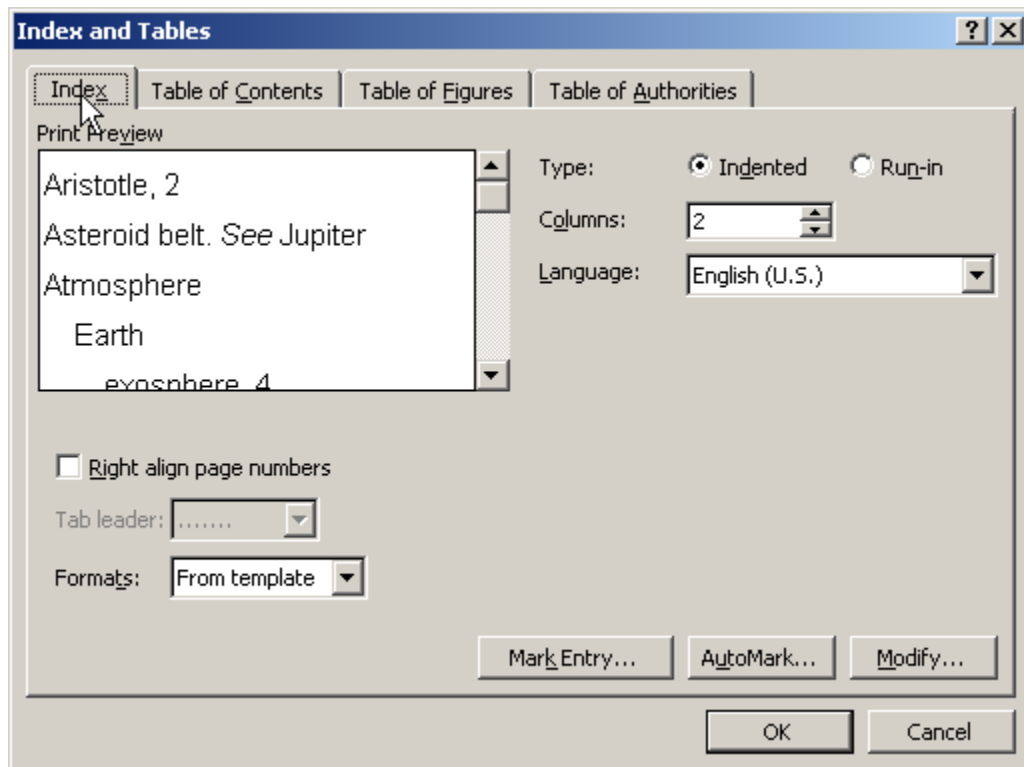
Another way to mark index entries is to use a concordance file. This is a separate Word document that you create, which contains all the keywords you want to mark in your main document.

To set up a concordance file:

1. Create a new Word document.
2. In the new document, insert a two column table. To do this, click the **Table** menu, select **Insert**, then click **Table**. Enter “2” as the number of columns and click **OK** to create the table.
3. **In the left column**, type the terms you want Word to mark as index entries in your main document. Be sure to create additional entries for other forms of the word that might appear; for instance, in addition to “genetic testing,” you might also choose to include another item, “gene testing.”
4. **In the right column**, type the entries as you want them to appear in the generated index.
5. For **sub-entries**, in the right column type the main entry, followed by a colon, followed by the sub-entry item. For example, an entry on the economic effects of natural disasters might have “economic” in the left column, and “Natural Disasters: Economic Effects” in the right column.
6. Save and close the concordance file.

To automatically mark index entries using a concordance file:

1. Open the main document.
2. Click the **Insert** menu, click the **Reference** sub-menu, then click **Index and Tables**. Click the Index tab, as shown below:



3. Click the **Automark** button.
4. In the dialog box, browse to the **concordance file** you've created and open it.

At this point, Word will mark index entries based on the terms in the concordance file. These marks are hidden field codes placed throughout your document, which do not print. To show you that the marks have been embedded, Word will **show non-printing characters** in your document. To hide these and other nonprinting items, click the “Show/Hide ¶” button (¶).

Generating the Index

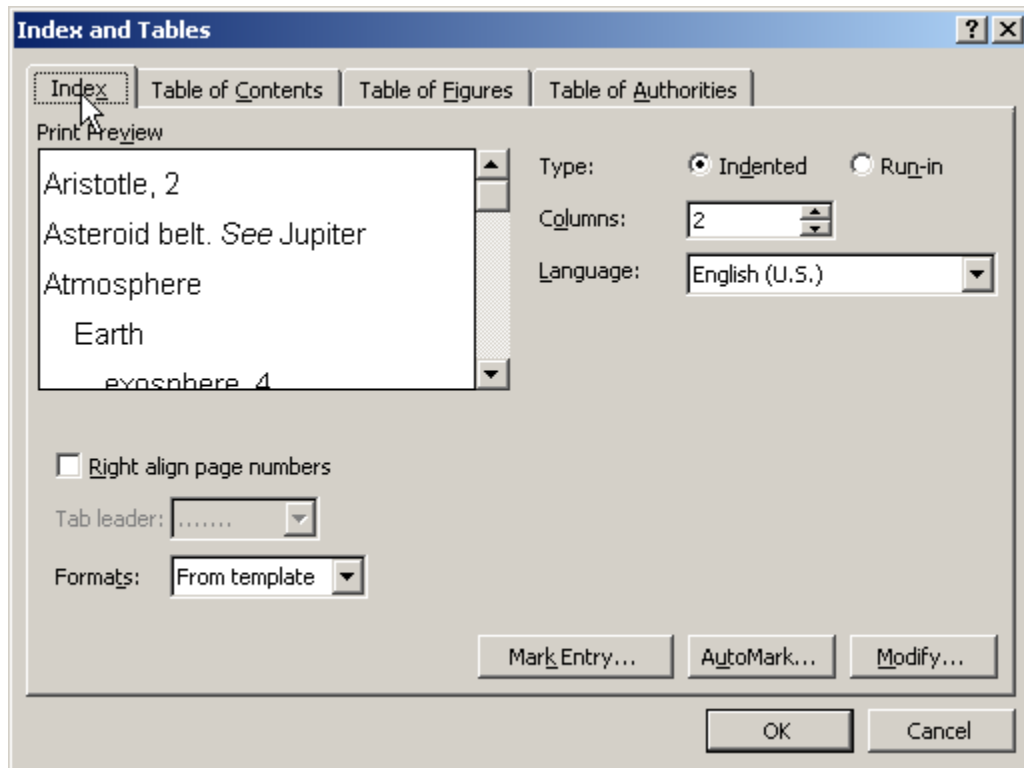
Once you've marked index items (either manually or with a concordance file), you can generate the index itself:

1. Place your cursor in the area of the document where you want the index.

Instructional Services

Creating Long Documents in Word

2. Click the **Insert** menu, click the **Reference** sub-menu, then click **Index and Tables**. Click the Index tab, as shown below:



3. Choose the **format** from the drop-down list, and select any special formatting options (such as run-in sub-entries, rather than indented; number of columns; right-aligned page numbers, and so on) you wish.
4. Click **OK** to create the index.

Getting Additional Help

The Help Desk provides consulting and Q&A help in a variety of ways:

785/864-0200

question@ku.edu

www.ku.edu/~helpdesk

Last Update: 10/29/2008