

TLMC SHORT CLASS: THESIS FORMATTING

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INTRODUCTION

To meet Graduate School Guidelines as well as any set by your department, you will need to modify the default, standard Word document. This handout is intended to show you how to use the tools to make the necessary modifications. For additional assistance, please visit Technology Learning and Media Center (<http://www.ndsu.edu/its/tlmc>) and under **Learning Links**, please choose **Thesis Formatting**.

GETTING HELP

- NDSU **Center for Writers** <http://www.ndsu.edu/cfwriters> (APA style, Chicago style)
- NDSU **Graduate School** http://www.ndsu.edu/gradschool/graduating_students/dtp

TIPS

- **Backups** - Make sure you save your thesis document in multiple locations (USB drive, online, Google Docs).
- **Printing** - Printing parts of your thesis on different printers will make your document look different.
- **Check Graduate School Guidelines** - Make sure you use the same format specified by the Graduate School on all the pages in your document.
- **Versions** - It is better to use a single version of Word to format your disquisition. The format of the document may change if you change the version of Word that you are using.
- **Fonts** - Using a large font size for titles is optional (the heading should be no more than two sizes larger than the normal font) and for the text size, a font size of 12 is preferred.
- **Spelling and grammar** - Check carefully! Word has a built-in thesaurus and spell check.
- **Style Manual** - Use an appropriate style manual (MLA, APA, etc.) for publishing in your discipline. Make sure that this style is used consistently throughout your thesis.
- **Template** - Use a template if you have a lot of subheadings or subdivisions so that it will make the documentation easier in the Table of Contents page. The thesis template available in Word does NOT meet guidelines, so you need to create one according to the Graduate School guidelines.
- **Help** - **TLMC** staff members can help you with technological issues (solving problems in software), and the **Center for Writers** (NDSU Library) offers help in grammatical and related issues. The TLMC is located in IACC 150C. Visit the TLMC website (<http://www.ndsu.edu/its/tlmc>) for information about lab hours and services.

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WORKING WITH STYLES

You likely want certain pieces of text throughout your document to have the same formatting – for example, all the chapter titles should be centered, bold, a certain font and size, etc. Word **styles** define the appearance of text elements throughout your document and can be saved in a template that you can use to create new documents with the same settings.

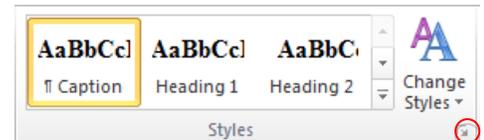
There are several advantages to using styles:

- Your document is consistent throughout, and you can make global changes easier.
- Heading text can be used to automatically generate table of contents.
- You can view the headings in the Navigation Pane (View Ribbon), click to jump to a heading, or drag and drop chunks of text.

To see a list of the predefined styles in Word, look at the **Styles Group** in the Home Ribbon.

APPLYING A STYLE

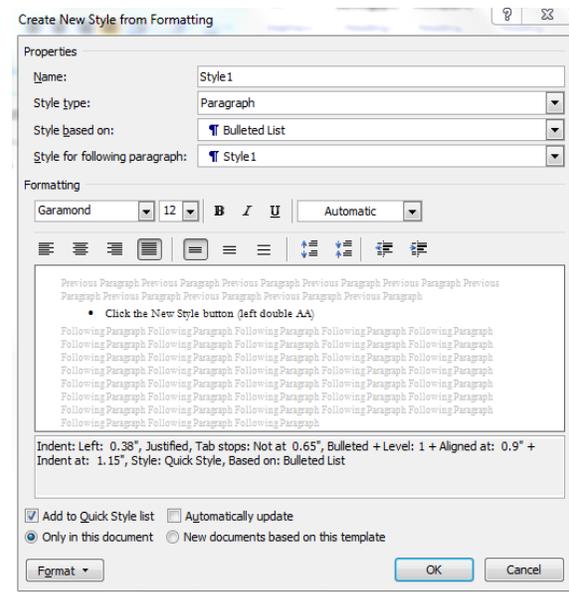
1. Select the text to which you want to apply a style.
2. In the Home Ribbon, in the **Styles Group**, click on the style you want to apply. If you don't see the style you want to use, click on the Expand icon in the lower right corner of the **Styles Group** to see a more complete list.



CREATING A NEW STYLE

We highly recommend creating a new style for applying to a text.

- Choose **Home** → **Expand icon under Change Styles** in Styles section
- Click the **New Style** button (left double AA)
- Name the style and select a style type (paragraph, character, table or list).
- Click **Format** and adjust the desired settings (font, paragraph, tabs, borders, etc.).
- Click OK to accept the format changes.



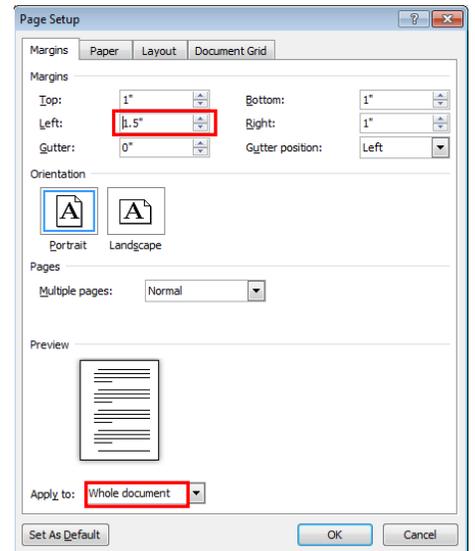
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SETTING MARGINS

Graduate School guidelines require a 1” margin on all sides.

1. On the Page Layout Ribbon, in the **Page Setup Group**, click on the arrow below the Margins options and select *Custom Margins...*
2. In the Page Setup dialog box, select the *Margins* tab, and type 1” into the space for all the margins.
3. Before closing the dialog box, make sure the *Apply to:* setting is set to *Whole Document*.
4. Click *OK*.

If for whatever reason you need to change the margin for only one section, be sure the *Apply to:* is set to *This section only*.



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ADDING PAGE NUMBERS

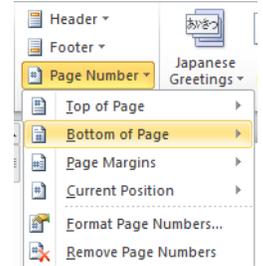
Microsoft Word provides you with the option of selecting a numbering style (e.g. “Roman Numeral”, “Arabic”) and gives you the option of selecting the “starting at” number. You can set the page numbers for your entire document, or if you need more control, you can do it section-by-section as well.

If you want continuous pagination that is all in the same format, go to the Insert Ribbon, and in the **Header & Footer Group**, click on the Page Number icon. Choose the appropriate placement of the number and a style.

If you are writing a dissertation, you have more complicated pagination. For example, Graduate School guidelines require that the page numbers begin on the *third* page of your document and the page number on that page should be Roman numeral “iii”. Page numbering should continue on in roman numerals until the first page of Chapter 1 is reached. At that point, the numbering should restart in Arabic (“1, 2, 3...”).

To accomplish this, we are going to divide the document into different “sections”, break them apart (so they can have different page number formatting), and **then** add the page numbers.

See sections below on how to achieve this.



STEP 1: USING SECTIONS TO CONTROL PAGE NUMBERING

The following instructions demonstrate numbering a dissertation document according to Graduate School guidelines. These steps assume you are including a title page, an approval page, abstract and acknowledgements and other front matter, and then the body of your dissertation.

1. Put your cursor before the first letter of “Abstract” or whatever is the first thing that comes after your approval page.
2. On the Page Layout Ribbon, in the **Page Setup Group**, click on the arrow next to the Breaks icon () and select *Next Page* under the *Section Breaks* section.
3. If you turn on the paragraph markers (), you should now see a section break on the previous page.
4. Put your cursor before the first letter of your first chapter and repeat steps 2 and 3.

You have just separated your dissertation into sections. If you want to see what section you are working in, at the left end of Status Bar (at the bottom of your Word document), Word tells you what page you are on, how many words are in your document, which section you are in, and so on.

If you don't see the section information, *right-click* on the Status Bar, and select **Section** in the menu that appears.

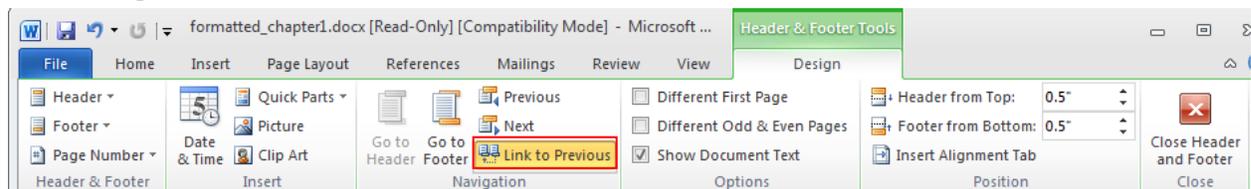


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STEP 2: BREAKING THE CONNECTION BETWEEN SECTIONS

By default, the headers and footers of each section are connected to those of the sections before and after it. Therefore, if you want different page number styles to vary from one section to the next (such as Roman or Arabic), you'll need to break the connection between the sections. Particularly with landscaped pages, it is often helpful to break the connection in the header as well as in the footer.

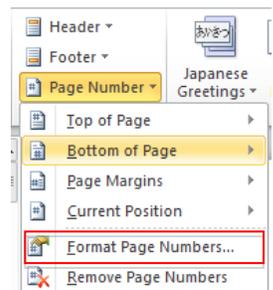
1. Put your cursor on the first page that needs the Roman numeral.
2. On the Insert Ribbon, in the **Header & Footer Group**, click on the arrow under the **Footer** icon and select *Edit Footer*.
3. You should now be in the footer of that page; in the Header & Footer Tools Design Ribbon, in the **Navigation Group**, unlink this section's footer from previous sections' footer by clicking the highlighted **Link to Previous** icon.
4. Put your cursor in the header area, and again click the highlighted **Link to Previous** icon.
5. Scroll down to the first page of the body of your dissertation (the chapters), make sure your cursor is in the footer, and click the highlighted **Link to Previous** icon again.
6. Repeat for the header area.



You have now successfully unlinked footers of these sections. Any page numbers you put in the body of your document will not affect the page numbering of your front matter, and vice versa.

STEP 3: ADDING THE PAGE NUMBERS

1. Scroll up to the section that contains your front matter and click in the footer of any page (don't do anything for your title page and other pages that don't require a page number).
2. On the Insert Ribbon, in the **Header & Footer Group**, click on the arrow next to the **Page Number** icon and select the positioning you'd like. Generally, *Bottom of the Page* is the choice, and either *Plain Number 2* (centered) or *Plain Number 3* (right aligned).
3. To change to Roman Numerals, on the Insert Ribbon, in the **Header & Footer Group**, click on the arrow next to the **Page Number** icon and select *Format Page Numbers...* to set the "start at" number and the style of numbering.
4. Scroll down to the first page of the next section (where your chapters start) and click in the footer.
5. Repeat steps 2 and 3 to set the page numbers for this section. We have noticed in Office 2010 that sometimes when you insert the page number in the chapters' sections it automatically turns to Arabic. If that is the case, then you just need to follow step 3 to make it start at 1.



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WORKING WITH LANDSCAPE PAGES

When you change the orientation of a section of page to landscape, the header and footer of that section do not change orientation. Instead, the header and footer are at the top and bottom of the page on your screen, but when you print, they are in the left and right margins of the page, not the top and bottom. Any page numbers in the header or footer will appear sideways on the left or right of the printed page. These steps will help you move the page numbers to the appropriate spot and turn them on their side so they print correctly.

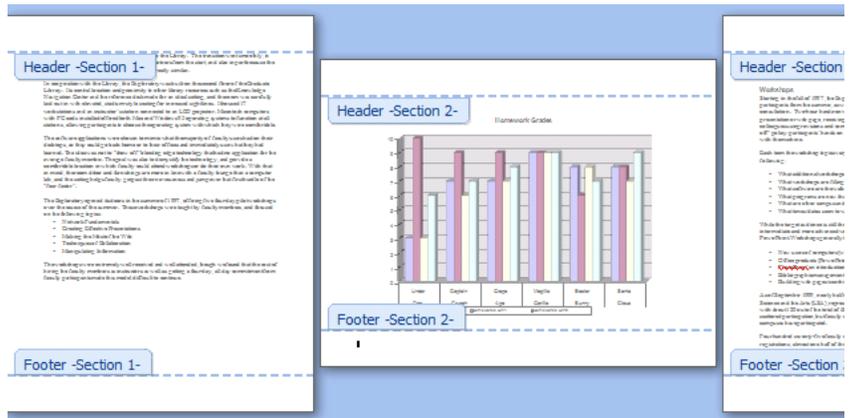
CREATING A LANDSCAPE SECTION

1. Click on the last line of the page *before* the page you want to have landscape orientation.
2. On the Page Layout Ribbon, in the **Page Setup Group**, click on the arrow next to the **Breaks** icon and select *Next Page* under the *Section Breaks* section.
3. This will create a new page and a section break. If you need to, use the *Delete* key, **not** the *Backspace* key (sometimes called the *backwards delete* key), on the keyboard to bring the next page's content back up to the page you are currently on.
4. Click on the last line of the last page that you want to have landscape orientation (or if you don't have content yet press *Enter* on the keyboard a few times), and repeat steps 2 and 3.
5. Click anywhere in section you want to have the landscape orientation.
6. On the Page Layout Ribbon, in the **Page Setup Group**, click on the arrow next to the **Orientation** icon and select *Landscape*. Word 2010 understands that you want landscape only for this section.

DISCONNECTING THE LANDSCAPE SECTION

1. Click somewhere in the first page of the section with landscape pages. On the Insert Ribbon, in the **Header & Footer Group**, click on the arrow below the **Header** icon and select *Edit Header*.
2. In the Header & Footer Tools Design Ribbon, in the **Navigation Group**, unlink this section's Header from previous sections' headers by clicking the highlighted **Link to Previous** icon.
3. Click on the **Go to Footer** icon and repeat step 3.
4. Scroll down to the first portrait page following your landscape section and repeat steps 3 and 4 for this section.

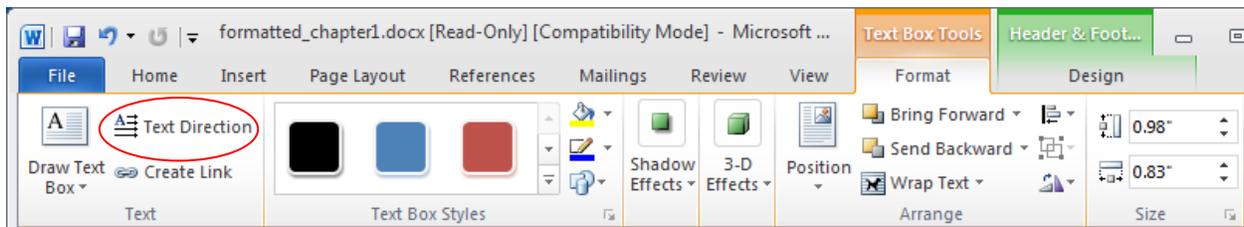
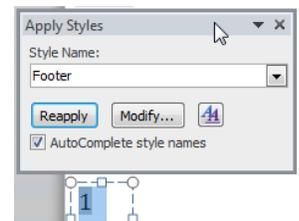
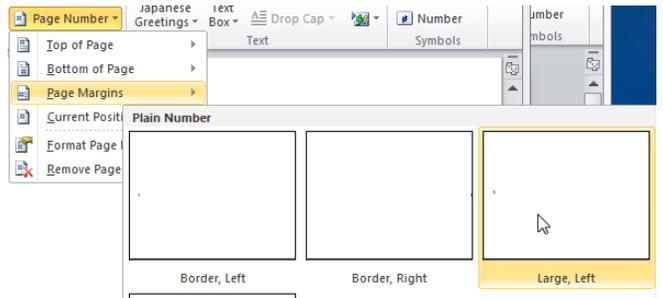
You have now disconnected the headers and footers in the sections prior to and following the landscape section of pages. This will prevent any changes you make to the page numbers on the landscape pages from affecting the numbering on other pages.



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ADDING PAGE NUMBERS TO THE LANDSCAPE PAGE(S)

1. Delete the page numbers from the footer of the landscape section.
2. On the Insert Ribbon, in the **Header & Footer Group**, click on the arrow next to the Page Number icon, choose *Page Margin*, and then in the *Plain Number* section, choose *Large, left* (unfortunately, they don't seem to have just a plain left option).
3. A large number will now appear in the left margin, and should be correctly centered.
4. Highlight the number, go to the Home Ribbon, and apply the Footer style so it matches all of your other footers.
 - a. Go to the **Styles Group**, click on the More icon () and then *Apply Styles*.
 - b. Type in "Footer" in the *Style Name:* box, and then click *Apply*.
5. In the Drawing Tools Format Ribbon, in the **Text Group**, click on Text Direction icon until the number is rotated in the right orientation.



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AUTOMATIC TABLE OF CONTENTS

You cannot generate any automatic tables without first using styles effectively throughout your document. Microsoft Word can scan your document and find everything in the Heading-level 1 style and put that on the first level of your table of contents, put any Heading-level 2 styles on the second level of your table of contents, and so on.

If you want an automatic table of contents you need to label all of your chapter titles and front matter headings (e.g. “Abstract” and “Acknowledgements”) in the style Heading-level 1. All major headings within your chapters should be labeled Heading-level 2. All subheadings should be labeled Heading-level 3, and so on.

If you have used Heading styles in your document, creating an automatic table of contents is easy.

1. Place your cursor where you want your table of contents to be.
2. On the References Ribbon, in the **Table of Contents Group**, click on the arrow next to the Table of Contents icon, and select *Insert Table of Contents...*
3. If you want to change the style of your table of contents (e.g. you want more space between the items on level 1 and level 2 of your table of contents, or you want all your level 1 items to be bold), click on the *Modify* button, select the TOC level you want to change, then click the *Modify* button to do so.
4. If you want to change which headings appear in your table of contents, you can do so by changing the number in the *Show levels:* pull down.
5. Click *OK* to insert your table of contents.
6. For inserting **Automatic Lists of Figures and Tables**, repeat the same steps 1-5 on a new page just after the "Table of Contents" page (**Note:** There's only a single heading-level in this case for both the lists).
7. If you encounter a warning sign prompting to *delete the existing table of contents*, then click **NO**.

The table of contents is a snapshot of the headings and page numbers in your document. At any time, you can update it by right-clicking on it and selecting *Update field*. Notice that once the table of contents is in your document, it will turn gray if you click on it. This indicates that it is getting information from somewhere else.

Note: It is possible to manually edit Table of Contents data but it might get deleted once the entire table is updated; so, make sure to add manual data every time you update Table of Contents.

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ANCHORING OBJECTS

Tables and objects (pictures, etc.) can be anchored so that they do not shift down the page when content is added above them. This is useful when content needs to be positioned at the top (or other location) on a page, regardless of what else is added to the document.

ANCHORING A TABLE

1. **Insert** → **Table**.
2. Choose **Table Tools** → **Layout** → **Properties**.
3. Select **Around** within the **Text Wrapping** section.
4. Click the **Positioning...** button.
5. Select the appropriate value for "Relative to:" within the **Vertical** and **Horizontal** sections.
6. Clear the checkbox next to "Move with text" within the **Options** section.

ANCHORING AN IMAGE

1. Insert the picture to anchor inside a text box inserted at the desired position anywhere inside the document.
2. Choose **Text Box Tools** → **Format**
3. Click the **More Layout Option** button in **Wrap Text** group.
4. Select the **Text Wrapping** tab.
5. Select the desired **Wrapping style** (*Note:* Anchoring doesn't work with "In Line with Text" option).
6. Select the appropriate value for "Relative to:" within the **Vertical** and **Horizontal** sections.
7. Clear the checkbox next to "Move object with text" within the **Options** section.
8. Enter the appropriate values within the **Vertical** and **Horizontal** sections.
9. Select the "Lock anchor" checkbox to ensure that the object remains anchored to the same paragraph if the paragraph gets shifted.