

TWR 2000

Helpful Functions in Microsoft Word 2010 for Technical Writing Students

A tutorial on how to track changes, use styles, automate tables of contents, and format objects

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TUTORIAL INTRODUCTION

As a technical writing student, you will find yourself making frequent use of Microsoft Word. While it is possible to use this software as a basic word processor and no more, this tutorial will explain how to use four useful intermediate functions. It will help ensure that you are able to format your documents consistently and professionally, and to make it easier for you to both create and edit documents.

TUTORIAL GOALS

By the end of this tutorial, you will know how to use the following functions in Word:

- Lesson 1 - Track Changes
- Lesson 2 - Predefined Styles
- Lesson 3 - Automated Tables of Contents
- Lesson 4 - Image Formatting

You are likely to find yourself relying on these four functions repeatedly as you pursue your education in technical writing.

Track Changes will make your peer reviewing and peer editing projects much faster and easier. While some hand-written editing will be required for editing-specific courses, in most cases Track Changes will prove a preferable option (especially in online courses, where students must submit all work electronically). This is true both for you as editor, and for you as writer.

Word's Predefined Styles Function serves two crucial purposes: to ensure consistency of formatting across various categories of information, and to identify those categories. This allows Word to automate a number of functions (such as formatting all headers at the same time) and references (such as inserting a table of contents). Using styles will allow you to change the entire visual design of your document with a click, or tweak minor elements of your formatting without having to manually locate and update every instance where the tweak is required.

Automated tables of contents provide a professional feel to your documents, while making it significantly easier for you to keep your table of contents up to date and accurate. Word will keep track of new sections or changing page numbers for you.

Finally, proper image formatting is a critical piece of consistent and useful visual design. This tutorial will teach you how to manipulate your image, how to control the relationship between your image and your text, and introduce you to some formatting and organization options. This will improve the relevance of your images, the ease of navigation for your readers, and the usability and understandability of your images.

The lessons focus on the basic elements and application of these functions, but avenues for further exploration of their more advanced elements and uses are included at the end of every lesson.

ASSUMPTIONS

This tutorial assumes that you have a working knowledge of Microsoft Word 2010 – it is not an introductory tutorial. It assumes that you are familiar with basic functions (such as text entry, basic formatting, how to select images, etc.) and terminology. It assumes you are using the Windows PC version of the software.

Further, while these instructions are useful for any frequent user of Word, it assumes you are a Technical Writing student specifically. It assumes you have a particular interest in visual consistency and professional visual design. While it does not provide you with instructions on how to develop an attractive or useful aesthetic, it does explain how you can use these functions to apply any visual design.

BEFORE YOU BEGIN

Before you begin the tutorial, please take a moment to review the following and ensure you are prepared.

GENERAL TERMINOLOGY

TABS: Tabs are located at the top of your interface. You can use the tabs to navigate between ribbons by clicking on them. They are analogous to menus in previous versions of word.

RIBBONS: Ribbons are the line of icons and menus located directly below the tabs. You can access a ribbon by clicking on the associated tab. Some ribbons are reactive, meaning that they will only appear when you meet certain conditions (e.g., the Picture Tools ribbon will only appear when you select an image).

GROUPS: Word arranges icons and menus on the ribbons into collections of related functions. These collections are called groups. Thin vertical dividers separate the groups. The name of the group is below the icons and menus, centred between the dividers.

DOCUMENT CONVENTIONS

Unless otherwise noted, centred images are associated with the text directly above them. Right-aligned images are associated with the text directly to their left. Callouts (arrows and boxes) are yellow filled with a blue border to differentiate them from the image of the interface.

TIME NEEDED TO COMPLETE

The time needed to complete this tutorial will vary by individual, but generally assume at least an hour to go through the entire thing. You can complete individual lessons in fifteen to twenty minutes if you wish to do them separately.

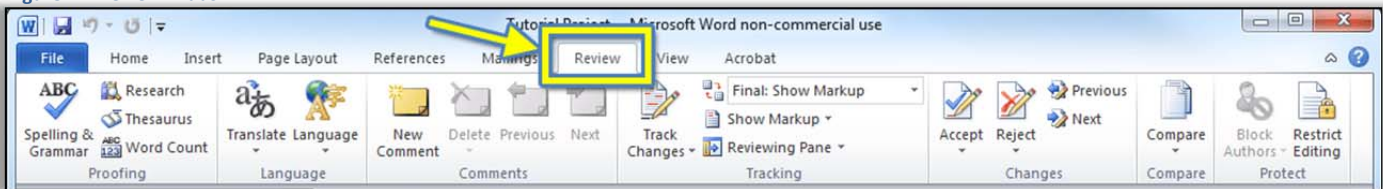
LESSON 1 – USING TRACK CHANGES

FUNCTION OVERVIEW: Track Changes is a function in Word that allows you to easily and effectively markup text with editorial revisions. Track Changes also allows you to apply those revisions to the text (or reject them entirely) with a few clicks. Whether you are the editor or the edited, Track Changes is a simple, straightforward way to identify what changes have been suggested, and choose whether to use them.

LESSON GOALS: By the end of this lesson, you will know how to turn Track Changes on and off, how to display or hide the markup, how to accept and reject changes, and how to insert comments.

NOTE: Unless otherwise specified, you will perform the procedures described in Lesson 1 using commands and icons located on the Review Ribbon. To open the Review Ribbon, go to the top of your interface and click the Review Tab (see the yellow square in the following image). Once the Review Ribbon is open, you will see the following groups and major icons (with some variation possible based on your resolution and settings):

Figure 1 – Review Ribbon



1.1 – TURNING TRACK CHANGES ON AND OFF

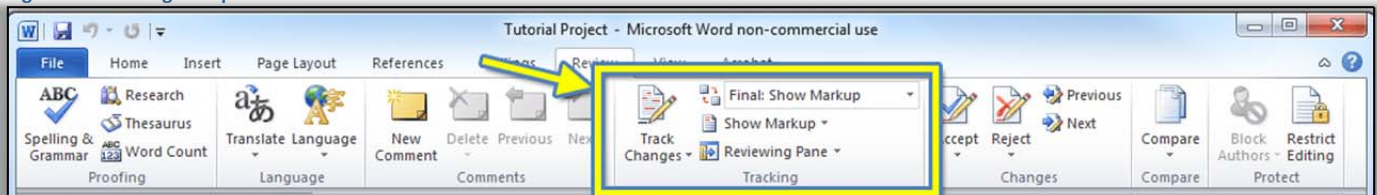
Turning Track Changes on causes Word to start recording the edits you make to the text; turning it off causes Word to stop recording the edits. In other words, as long as you have Track Changes turned on, Word keeps a record of your edits and can provide a markup for those edits at any time. Word cannot provide a markup for edits made while Track Changes is off, because the software has no record of the changes you made.

PROCEDURE

NOTE: PERFORM THIS PROCEDURE **BEFORE** MAKING ANY EDITS FOR WHICH YOU REQUIRE MARKUP. WORD CANNOT RETROACTIVELY MARKUP EDITS MADE WHILE YOU HAVE TRACK CHANGES TURNED OFF.

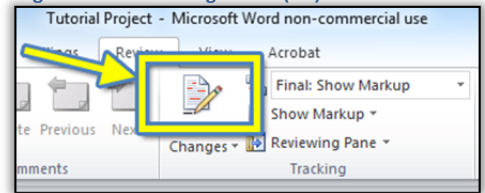
1. Locate the **TRACKING GROUP** on the Review Ribbon.

Figure 2 – Tracking Group



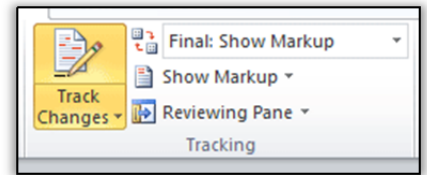
- To turn Track Changes on, **CLICK THE LARGE ICON** labeled Track Changes in the Tracking Group.

Figure 3 – Track Changes Icon (off)



You will know that Track Changes is on when Word highlights the icon in orange.

Figure 4 - Track Changes Icon (on)



- PERFORM YOUR EDITING DIRECTLY IN THE TEXT.** When your edits are complete, turn Track Changes off by repeating step one. The orange highlighting around the icon disappears to indicate that Word is no longer tracking your changes (see Figure 3 for an example).

1.2 – DISPLAYING OR HIDING THE MARKUP

Word allows you to hide or display the markup on the screen and on the printed page. This is useful in cases where you need to maintain a record of your changes, but you have to print a “clean” version for approvals. It is also useful in cases where you have made so many edits that the document has become difficult to read with the markup displayed.

PROCEDURE

- Locate the **TRACKING GROUP** of the Review Ribbon (see step 1 of Lesson 1.1).
- Click the **MARKUP DISPLAY MENU** (located to the right of the Track Changes Icon, at the top of the list. The displayed text identifies the currently selected option).
- This opens the menu and gives you access to four options. Click the one that best suits your needs:
 - To **DISPLAY THE ENTIRE MARKUP** select either “Final: Show Markup” or “Original: Show Markup”. These two options are almost identical. The only difference is that in cases where you have made formatting changes, the “Final: Show Markup” option displays the *new* formatting, and the “Original: Show Markup” option displays the *old* formatting.

Figure 5 – Markup Display Menu (closed)

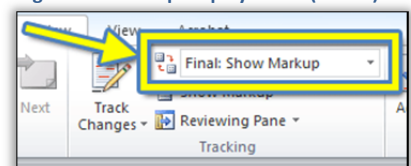
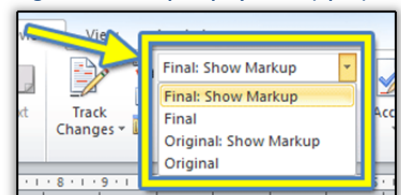


Figure 6 – Markup Display Menu (open)



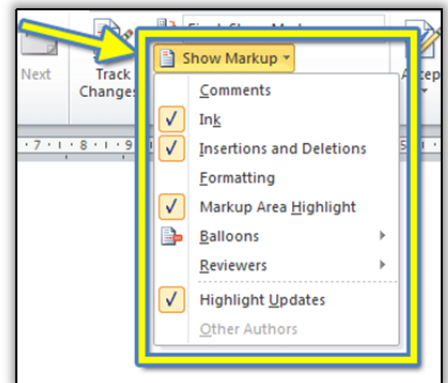
When you select either of the two options noted above, Word displays any changes you make directly in the text, even if you currently have Track Changes off (see Figure 7).

Figure 7 – Sample markup

While the actual ~~edits~~ markup will vary based on how many others have edited the document, and ~~other~~ stuff individual settings, it should look ~~a little bit~~ something like this.

- b. To **HIDE THE ENTIRE MARKUP**, open the Markup Display Menu (see Figure 6) and select either “Final” or “Original”. “Final” hides the markup and displays the text as though you applied the edits. “Original” hides the markup and displays the text as though you rejected the edits. Note that even with the markup hidden, the record of the edits remains.
- c. To **DISPLAY OR HIDE SPECIFIC TYPES OF MARKUP**, click the Show Markup Icon, located to the centre-right of the Track Changes Icon. This displays a pull-down menu with various types of markup listed.
- d. **CLICK ANY LIST ITEM** to toggle the checkmark on the left side of the menu. A checkmark indicates that Word is displaying that type of markup. A blank space indicates that Word is hiding it. In Figure 8, for example, Word is hiding Comments and Formatting related markup, but displaying Insertions and Deletions related markup.

Figure 8 – Show Markup Menu



REMEMBER THAT AS LONG AS YOU HAVE TRACK CHANGES TURNED ON, WORD IS KEEPING A RECORD OF YOUR EDITS – WHETHER OR NOT YOU HAVE THE MARKUP DISPLAYED.

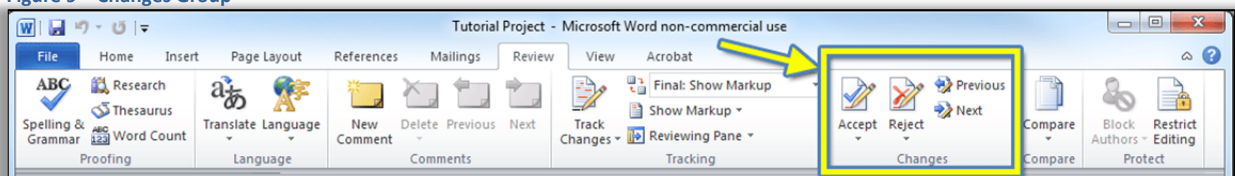
1.3 – ACCEPTING OR REJECTING CHANGES

When it is time to review the edits, Word allows you to very easily navigate between the revisions, and accept or reject them with a click. In essence, you are able to automatically apply the edits to your document, or reject them entirely, without having to redo them manually (as you would with hand-written markup).

PROCEDURE

1. Locate the **CHANGES GROUP** of the Review Ribbon (directly to the right of the Tracking Group).

Figure 9 – Changes Group



2. To **NAVIGATE BETWEEN CHANGES** in the document without accepting or rejecting them, use the Previous and Next Icons.

Click the Previous Icon go directly to the edit that precedes your cursor in the document. Click the Next Icon to go directly to the edit that follows your cursor in the document. Note that both options relocate your cursor.

Figure 11 – Track Changes Navigation Icons

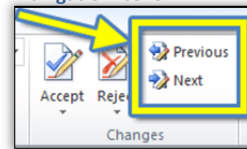
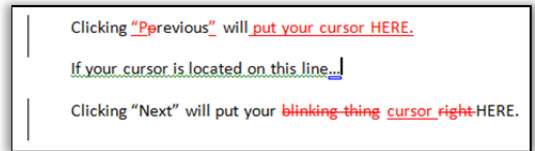


Figure 10 – Track Changes Navigation sample



3. To **APPLY ONE CHANGE AT A TIME**, place your cursor beside or within the edit that you wish to accept. Click the Accept Icon to apply that change.

Note that Word automatically moves your cursor to highlight the next edit after applying the first one.

- a. You can also click the “Accept” text below the icon to get a pull-down menu that allows you to do the same thing by clicking “Accept and Move to Next”.
- b. Alternatively, **IF YOU DO NOT WISH TO LOSE YOUR PLACE** in the document, click “Accept Change” from the menu, which causes Word to apply the change, but not move your cursor.

Figure 12 – Accept Icon

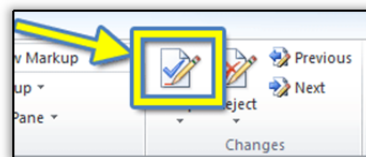
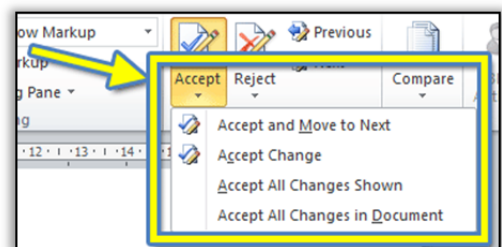


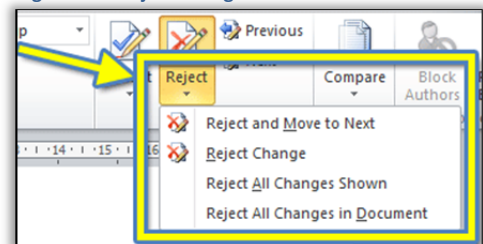
Figure 13 – Accept Changes Menu



4. To apply **MULTIPLE CHANGES AT ONCE**, click the “Accept” text below the Accept Icon to access the pull-down menu (See Figure 13) and choose one of the two options noted below.
 - a. To **APPLY ONLY THE CHANGES DISPLAYED WITH MARKUP**, click “Accept All Changes Shown”. Note that this neither applies nor rejects changes you have chosen to hide – they remain recorded, but hidden.
 - b. To **APPLY ALL CHANGES**, whether displayed or not, click “Accept All Changes in Document”.

5. To **REJECT CHANGES** – which deletes the record of them without applying them to the text – repeat the steps above, but use the Reject Icon, or the Reject Changes Pull-Down Menu (which has the same options as the Accept Changes Pull-Down Menu).

Figure 14 – Reject Changes Menu



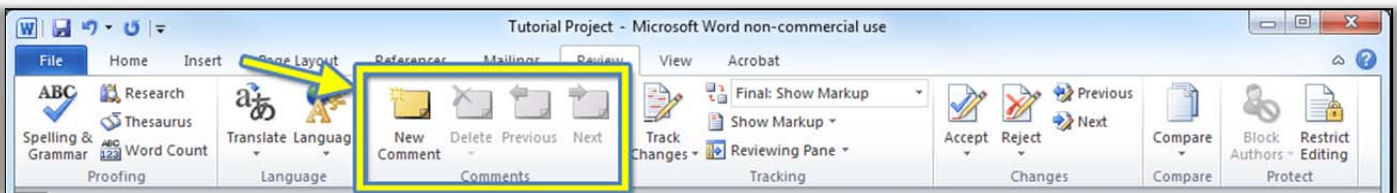
1.4 – COMMENTING

The Commenting Function in Word allows you to insert a custom message in the margins of the document, connected to a specific piece of text in the main body of the document. This is very useful for editorial comments (e.g., requests for clarification, or comprehensive editing suggestions). Additionally, it enables and facilitates discussion and collaboration between multiple authors or editors, and presents this discussion in a way that remains directly connected to the relevant text, without interrupting the flow or formatting of the main document.

PROCEDURE

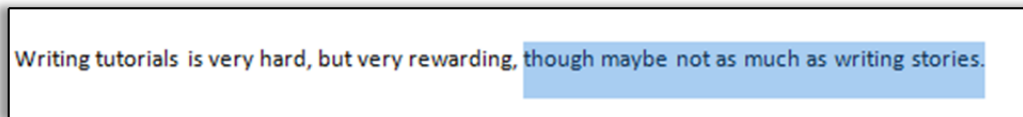
1. Locate the **COMMENTS GROUP** of the Review Ribbon.

Figure 15 – Comments Group



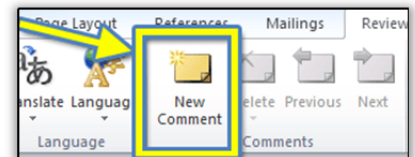
2. To **INSERT A COMMENT**, highlight the text you wish to discuss.

Figure 16 – Highlighted text



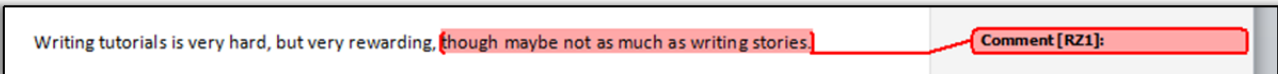
3. Click the **NEW COMMENT ICON**, located at the left-most side of the group.

Figure 17 – New Comment Icon



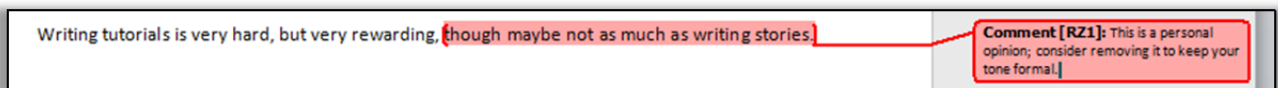
4. This opens a new comment balloon in the margins. A line connects the balloon to the text to which it applies. Note the bolded text in the balloon, which identifies it as a comment ("Comment" in Figure 18 and Figure 19), as well as a tag identifying the user who made the comment ("[RZ1]" in Figure 18 and Figure 19). This is useful when multiple users are inserting comments.

Figure 18 – New comment balloon



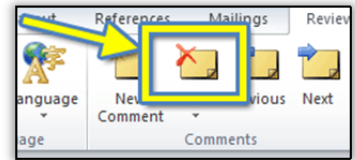
- a. Type your comment into the balloon as you would any other text. When you are done, click anywhere else in the document. By default, your comments remain displayed as you work.

Figure 19 – Comment balloon sample



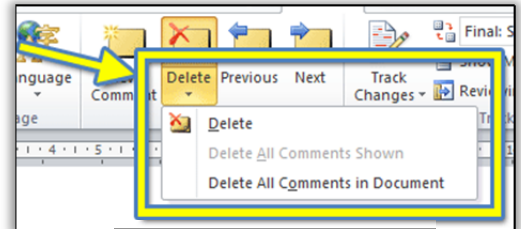
5. To **DELETE A SINGLE COMMENT**, click on the balloon to select the comment, and then click the Delete Icon in the Comments Group (immediately to the right of the New Comment Icon). The comment, the connecting line, and the highlighting of the text all disappear.

Figure 20 – Delete Comment Icon



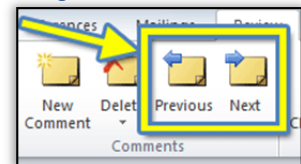
6. To **DELETE ALL COMMENTS**, click the “Delete” text below the Delete Icon to open the Delete Comment Menu. Click “Delete All Comments in Document”. All comments, connecting lines, and associated highlighting disappear.

Figure 21 – Delete Comment Menu



7. To **NAVIGATE QUICKLY BETWEEN COMMENTS**, use the Previous and Next Icons in the Comments Group. The Previous Icon takes you directly to the comment that precedes the location of your cursor in the document. The Next Icon takes you directly to the comment that follows the location of your cursor in the document.

Figure 22 – Comment Navigation Icons



LESSON SUMMARY

In summary, Track Changes performs electronic markup of revisions as you make them, keeping a record of the changes (even when you hide the markup), and allowing you to automatically apply or reject the changes without having to manually copy them over from another document. It allows multiple editors to suggest changes to the document, and can keep track of which editors made which changes.

The Commenting function allows you to include complicated editorial notes in the margin of the document (e.g., comprehensive editing suggestions, requests for clarification, etc.).

These functions are both located in the Review Ribbon of the interface, in the Comments, Tracking, and Changes groups specifically.

TEST YOUR KNOWLEDGE

Answer the following questions.

1. In what group of the Review Ribbon, is the Track Changes Icon located?
2. Is it possible to hide some types of edits, but display others?
3. If you do not wish to lose your place in the document, which option should you choose from the Accept Changes Pull-Down Menu?
4. Where is the default location for Word to display comments?

EXPLORE FURTHER

This lesson covers the basics of these functions; however, if you would like to explore some advanced functions you can:

- Experiment with the “Change Tracking Options...” option under the Track Changes Menu to customize your markup;
- Try comparing two documents (an original version and an edited version) using the Compare Icon in the Compare Group of the Review Ribbon; or
- Explore the Restrict Editing options, using the Restrict Editing Icon in the Protect Group of the Review Ribbon.

LESSON 2 – USING PREDEFINED STYLES

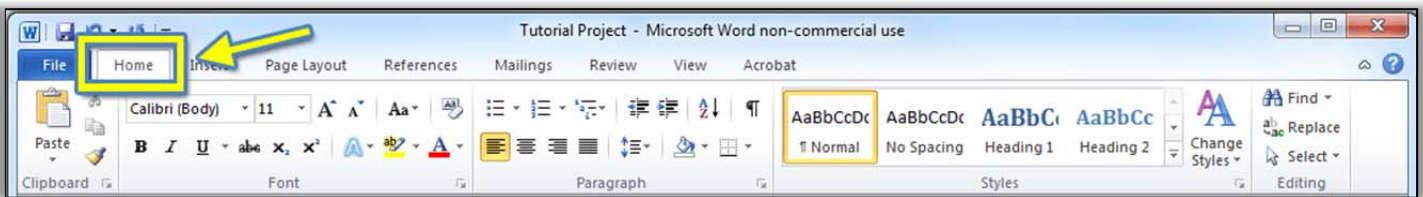
FUNCTION OVERVIEW: The Predefined Styles Function in Word allows you to establish a set of formatting rules for a particular category of text. The formatting rules can include everything from the font size and colour, to whether to include a border and how to space or indent the text. When you apply a style to a selection of text, you are also identifying that text as part of a category of information (e.g., level 1 headers, or quotes, or bulleted lists). Word can use that identifier to automate certain functions (e.g., changing the formatting of all headers at once) and references (e.g., tables of contents – see Lesson 3).

By using the Predefined Styles Function, you can ensure that your document is formatted consistently (reducing visual noise and increasing reader comprehension). You can also automate certain references in your document, making your overall job easier.

LESSON GOALS: By the end of this lesson, you will know how to apply the default styles in Word to your text, how to switch between default style sets, and how to modify or create your own styles.

NOTE: Unless otherwise specified, you will perform the procedures described in Lesson 2 using commands and icons located on the Home Ribbon. To open the Home Ribbon, go to the top of your interface and click the Home tab (see the yellow square in the following image). Once the Home Ribbon is open, you will see the following groups and major icons (with some variation possible based on your resolution and settings):

Figure 23 – Home Ribbon

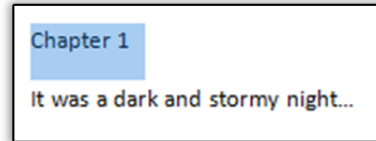


2.1 – APPLYING STYLES

Applying styles to your text ensures consistent formatting, and sorts information into easily referenced categories. Whether you are using Word’s default styles, or have created your own, styles are easy to apply, requiring only a few clicks.

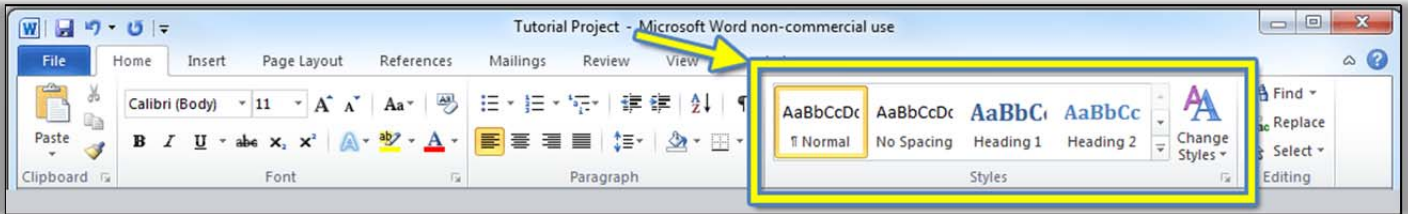
1. **SELECT THE TEXT** to which you would like to apply a style.

Figure 24 – Highlighted text 2



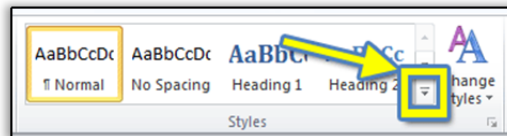
2. Locate the **STYLES GROUP** of the Home Ribbon.

Figure 25 – Styles Group



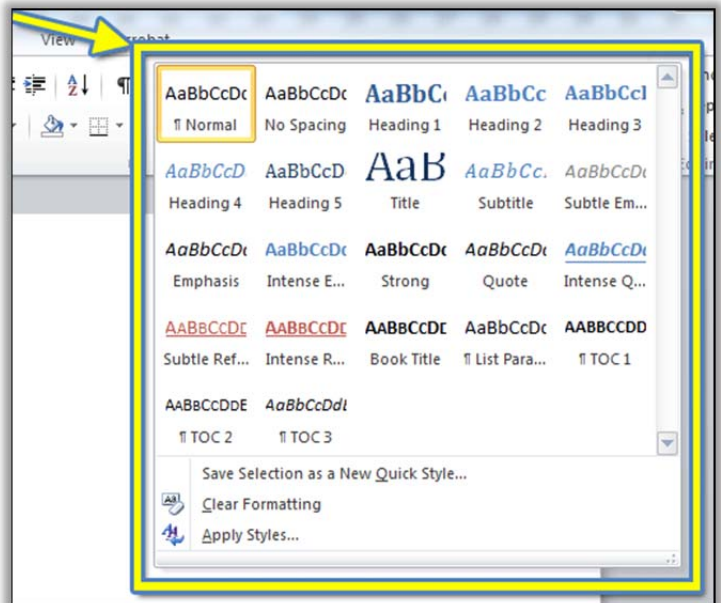
3. Click the bottom arrow of the Styles Preview Window to view a **LIST OF STYLES SHORTCUTS**.

Figure 26 – Styles Preview Window



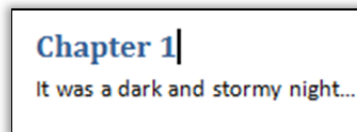
- a. By default, this list includes those styles recommended by Word – usually a “normal” style (for body text), a number of header styles, any custom styles, and various emphasis or quotation styles.

Figure 27 – Styles shortcuts



4. **LOCATE THE STYLE** you wish to apply, and then click either on the example text or on the name of the style.

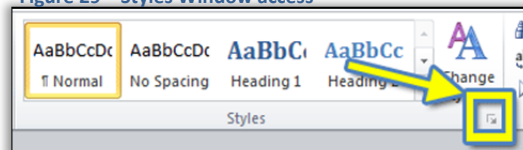
Figure 28 – Header 1 Style example



5. This **APPLIES THE STYLE** to the text you highlighted in Step 1. Compare the highlighted text in Figure 24, to the text in Figure 28.

6. If the **STYLE YOU WANT IS NOT IN THIS LIST**, click the small diagonal arrow in the bottom-right corner of the Styles Group.

Figure 29 – Styles Window access



7. This opens the **STYLES WINDOW**, which lists all of the styles currently available in your document. To apply a style, scroll through the list to find the one you wish to apply, and then click on its name. This applies the style to the text you highlighted in Step 1.

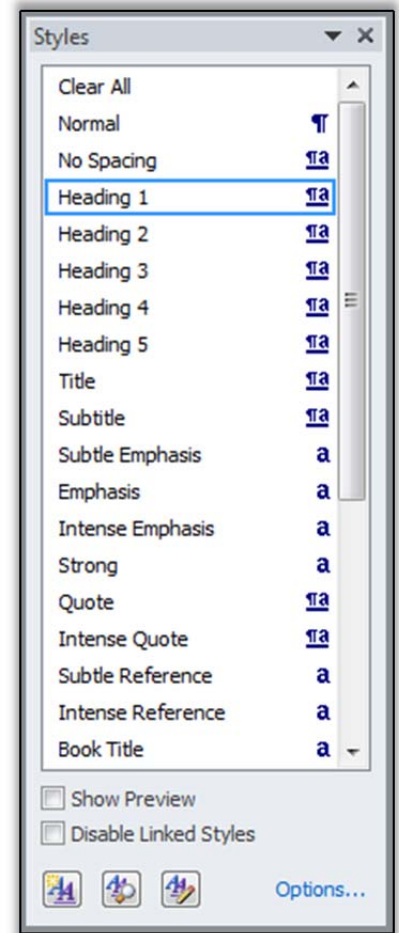
Important Note

IT IS IMPORTANT TO APPLY STYLES IN A CONSISTENT AND LOGICAL WAY. For example, say you had two visually identical styles: one for emphasis, and one for quotes. It would be important to use the emphasis style for your emphasized text, and the quote style for your quoted text, even though they look the same.

This is because the formatting of the text is only half of what the style does – it also identifies the text as a member of a category of information. If you apply the emphasis style to quoted text, Word thinks your quote is emphasized text.

If you decide to change the format of one of the styles later, you will wind up with incorrect formatting for misidentified information. Additionally, if you have applied the styles inconsistently, even though visually there may be little to no difference, when you try to automate any references (e.g., tables of contents), Word will place information in the wrong locations, or include unrelated information.

Figure 30 – Styles Window



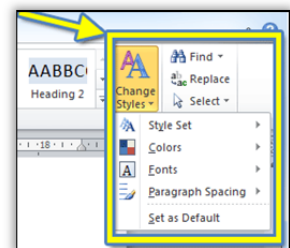
2.2 – SWITCHING BETWEEN DEFAULT STYLE SETS

A “style set” is a collection of styles that have been designed to work together both aesthetically and functionally. Word offers a variety of default style sets that you can choose from, and offers two ways to customize them (premade colour palettes and font sets).

PROCEDURE

1. Locate the **STYLES GROUP** of the Home Ribbon (see Section 2.1, Step 2).
2. Click the **CHANGE STYLES ICON**, located to the far right of the Styles Group.
3. This opens the **CHANGE STYLES MENU**.

Figure 31 – Change Styles Icon and Menu



4. To **CHANGE THE ACTIVE STYLE SET**, mouse over the “Style Set” option to access the Style Set Menu. As you mouse over the various options, Word previews them in your document. Locate the one that best suits your needs, and then click its name to apply it to your document. Word displays a checkmark beside the name of the currently active style set.

- a. If you have already applied styles in your document, as soon as you select the new style set, Word automatically updates all instances of the associated styles to the new set. This is a quick and easy way to compare and evaluate different visual designs using your own document.

5. Once you have selected your desired style set, you can customize it further using the “Colours” and “Fonts” options on the Change Styles Menu.

- a. To **CHANGE THE COLOUR SCHEME** of your style set, mouse over the “Colours” option to access the Colours Menu. Locate the desired colour scheme in the list (note the scroll bar on the right).

As with the style sets, Word previews the new colour scheme in your document as you mouse over the options. Click on the colour scheme or the name to apply it to your document. Word outlines the currently active colour scheme in orange (see the “Office” colour scheme in Figure 33).

- b. To **CHANGE THE FONT SET** used by the style set, mouse over the “Fonts” option to access the Fonts Menu. Locate the desired font set in the list (note the scroll bar on the right).

As with the style sets, Word previews the new fonts in your document as you mouse over the options. Click on the font set to apply it to your document. Word highlights the currently active font set in orange (see the “Office” font set in Figure 34).

Figure 32 – Style Set Menu

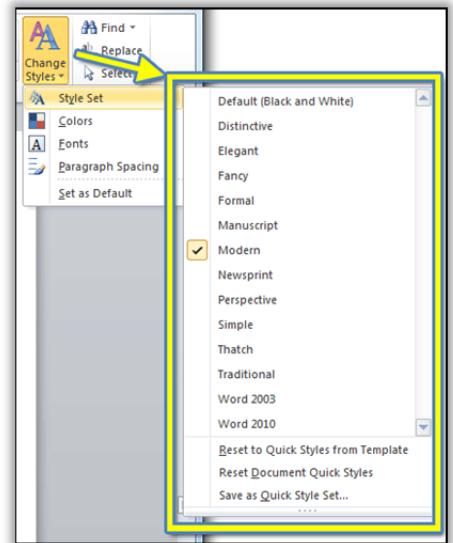


Figure 33 – Colours Menu

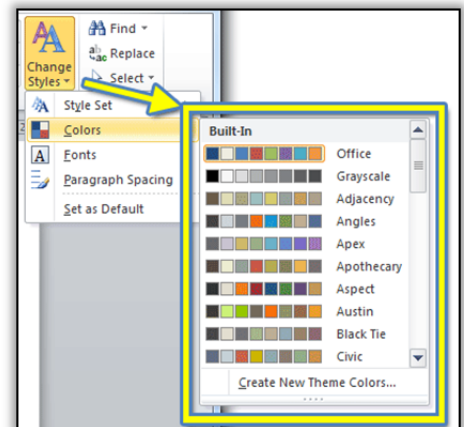
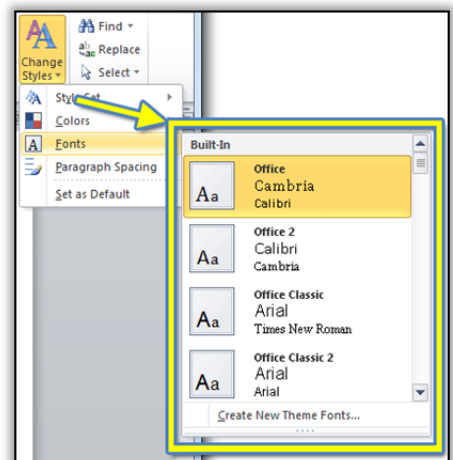


Figure 34 – Fonts Menu



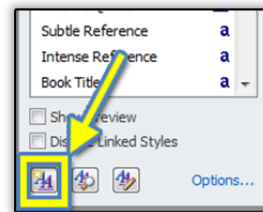
2.3 – MODIFYING OR CREATING A STYLE

While Word offers a large number of default styles and style sets, there will be situations in which it is necessary to modify the existing sets, or to create your own from scratch. For example, you may need to establish an organization-specific template using your company’s branding policy, or you may wish to tweak the spacing of a default style to better suit the visual needs of your audience.

PROCEDURE

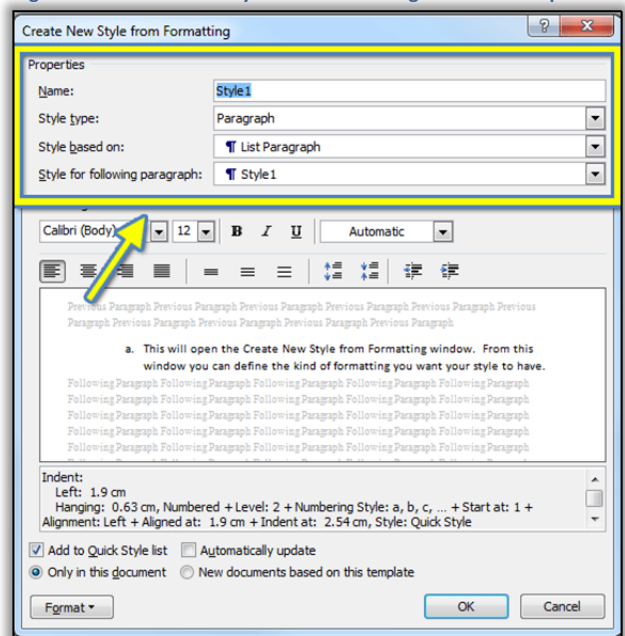
1. To **CREATE A NEW STYLE**, open the Style Window (see Lesson 2.1, Step 6).
2. Click the **NEW STYLE ICON**, at the bottom left of the Style window (see Figure 35).
3. This opens the **CREATE NEW STYLE FROM FORMATTING WINDOW** (see Figure 36 or Figure 37). The window has two sections.
4. Use the **PROPERTIES SECTION** to establish the basic settings for your new style.

Figure 35 – New Style Icon



- a. **NAME:** Provide a name for your style (note that the name is also used to identify the category of the information).
- b. **STYLE TYPE:** Identify whether you intend to use it for paragraphs, lists, tables, etc..
- c. **STYLE BASED ON:** Select the pre-existing style you wish to use as a template (select “(No style)” to start from scratch).
- d. **STYLE FOR FOLLOWING PARAGRAPH:** Identify what style, if any, you want the following paragraph to take on (for example, headers are typically only a single “paragraph,” so you can save a step if you use this option to tell Word to switch the style to your regular body text style when you are done entering your header).

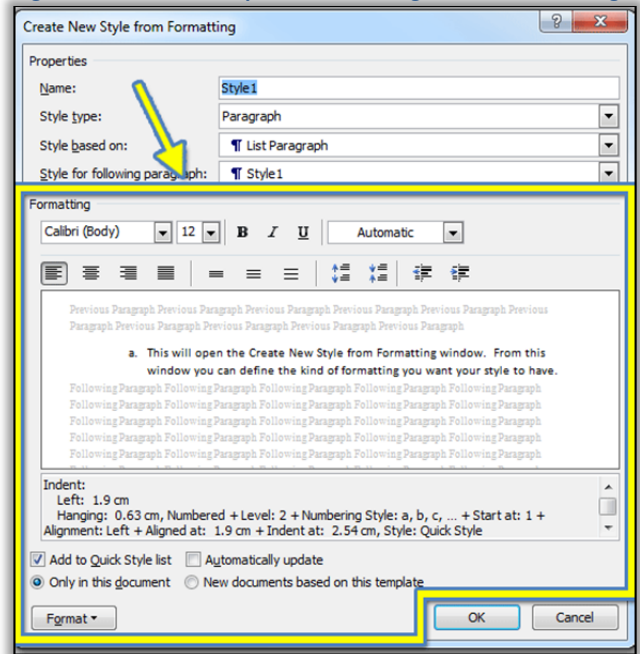
Figure 36 – Create New Style from Formatting Window – Properties



5. Use the **FORMATTING SECTION** to define the formatting you want the style to use. Basic options are available in the window, and more advanced options (such as spacing, borders, etc.) are available from the Format Menu located at the bottom-left of the window.

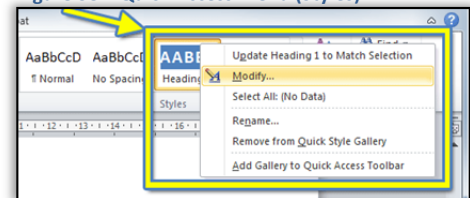
- a. When you are done, click the OK button to create your style. You can now access it through the shortcut list (see Section 2.1, Step 3) or the Style Window (see Section 2.1, Step 6).

Figure 37 – Create New Style from Formatting Window – Formatting



6. To **MODIFY AN EXISTING STYLE**, right-click on the style name in either the shortcut list or the Style Window to open the Quick Access Menu. Select the “Modify...” option.

Figure 38 – Quick Access Menu (Styles)



7. This opens the **MODIFY WINDOW**. The Modify Window is identical to the Create New Style from Formatting Window, except that you are unable to modify the type of the style. Follow the instructions in Steps 4 and 5 to modify the style.

8. When you are done, click the OK button to create your style. You can now access it through the shortcut list or the Style Window.

LESSON SUMMARY

In summary, styles are a quick and easy way to apply formatting and categorize your information with a single click. They are a predefined set of formatting rules that serve two main purposes:

1. To ensure that text is formatted consistently within and across categories of information;
2. To identify which sections of text belong to which categories of information, enabling Word to change the formatting of all text within a specific category at once, or to automate reference tables.

Consistency is a key part of any visual design, and using styles can help you achieve that in your document. Word offers many different types of style sets (collections of styles designed to work together in an aesthetic and functional way) which you can further customize to match different colour schemes and font sets.

Additionally, you can modify a given style to suit your specific needs, or create your own styles (from scratch, or using a pre-existing style as a base).

You can access and customize styles from the Styles Group of the Home Ribbon.

TEST YOUR KNOWLEDGE

Answer the following questions:

1. How do you open the Styles Window?
2. How does Word indicate which style set is currently active?
3. What is the difference between the Create New Style from Formatting Window and the Modify Window?

EXPLORE FURTHER

This lesson covers the basics of these functions; however, if you would like to explore some advanced functions you can:

- Create custom colour schemes or font sets by clicking on the “Create New Theme Colours/Fonts” option at the bottom of the applicable menus;
- Change which styles Word recommends through the Manage Styles Icon at the bottom of the Styles Window (beside the New Style Icon);
- Change how Word displays styles by clicking the “Options...” text at the bottom-left of the Styles Window.

LESSON 3 – CREATING A TABLE OF CONTENTS (USING STYLES)

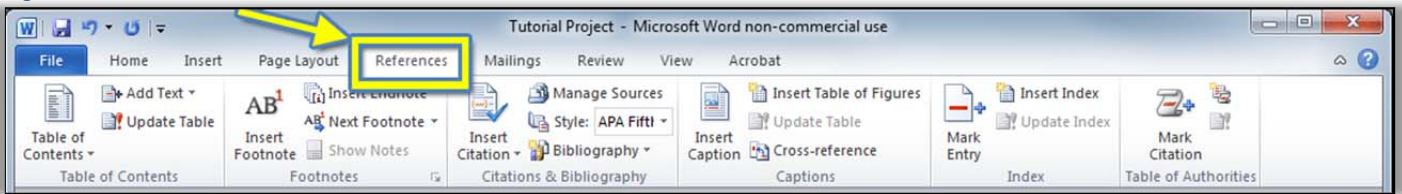
FUNCTION OVERVIEW: The Automated Table of Contents Function in Word is an easy and elegant way to create an automated table of contents for your document. You can insert a professional looking table of contents with just a few clicks. Word will keep it updated as you work, adding new information or updating sections and page numbers as required. Using an automated table of contents prevents the need to manually create and format one, and significantly reduces the risk of errors of omission or incorrect page references.

Word uses the styles in your document to create the table of contents. As discussed in Lesson 2, when you apply styles to text, you also identify the text as part of a given category of information. By default, Word will search your document for any text using a header style (levels 1 to 3) and include them in your table of contents. It is possible to customize what styles Word includes.

LESSON GOALS: By the end of this lesson, you will know how to insert an automated table of contents using one of the default formats, how to insert a table of contents using a custom format, and how to update the table to reflect any changes in your document.

NOTE: Unless otherwise specified, you will perform the procedures described in Lesson 3 using commands and icons located on the References Ribbon. To open this ribbon, go to the top of your interface and click the References Tab. Once the References Ribbon is open, you will see the following groups and major icons (with some variation possible based on your resolution and settings):

Figure 39 – References Ribbon



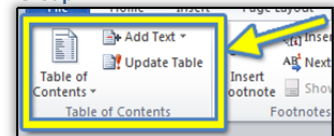
3.1 – INSERTING A DEFAULT TABLE OF CONTENTS

The default tables of contents available in Word require only a few clicks to insert, but will include only the first three levels of header styles in your documents. For most documents this is likely to be sufficient; however, if you have a very long or a very short document, a complex document, or specific reference needs (such as needing to reference figures and tables in your table of contents), please see Section 3.2 for instructions on how to insert a custom table of contents.

PROCEDURE

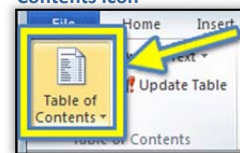
1. **PLACE YOUR CURSOR** at the location where you would like to insert your table of contents.
2. Locate the **TABLE OF CONTENTS GROUP** on the References Ribbon.

Figure 40 – Table of Contents Group



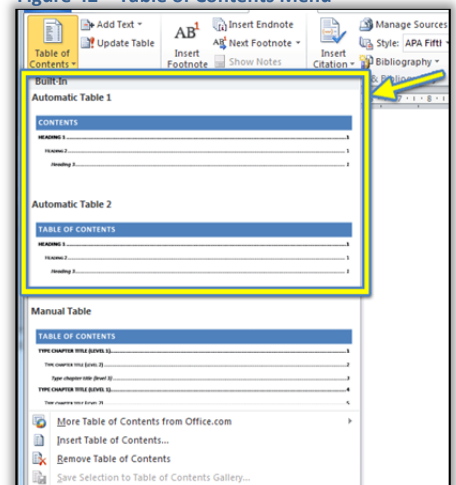
3. Click the **TABLE OF CONTENTS ICON**.
4. This opens the **TABLE OF CONTENTS MENU** (see Figure 42). Note that for the purposes of this procedure, you only need the top two options.

Figure 41 – Table of Contents Icon



5. Each of these options creates a table of contents using all text in your document with the Header 1, Header 2, or Header 3 style. The only difference between the options is the title of the table ("Table of Contents", or "Contents"). To **SELECT AN OPTION**, click on it (the title or the sample).

Figure 42 – Table of Contents Menu



6. Word creates a table of contents using the top three levels of headers in your document and inserts it at your cursor's location.
7. **IF YOU NOTICE THAT A HEADER IS MISSING**, navigate to that text in your document and ensure that it is using one of the top three header styles (reapply the style if you are unsure). Go to Section 3.3 to find instructions on how to update the table of contents to reflect the new information.

3.2 – INSERTING A CUSTOM TABLE OF CONTENTS

Creating a custom table of contents is sometimes necessary when you want to customize either the kind of information included (more or less than three headings, or non-heading styles), or you wish to apply a different format to the table. The final table will be otherwise functionally indistinguishable from the default formats noted in Section 3.1 – it will work the same way and you can update it the same way.

PROCEDURE

1. **PLACE YOUR CURSOR** at the location where you would like to insert your table of contents.
2. Click the **TABLE OF CONTENTS ICON** to open the Table of Contents Menu (see Section 3.1, Steps 3 and 4)
3. Click the **“INSERT TABLE OF CONTENTS...”** option.
4. This opens the **TABLE OF CONTENTS WINDOW**, which offers you various options to **CUSTOMIZE AND FORMAT YOUR TABLE OF CONTENTS**.
 - a. The Print Preview Section in the top-left shows you a preview of how your table of contents will look on the page. The Web Preview Section shows you how it would look if converted to a webpage.
 - b. To **FORMAT YOUR PAGE NUMBERS**, use the three options directly below the Print Preview Section. The Show page numbers check box allows you to toggle page numbers on or off. The Right align page numbers check box allows you to choose whether to follow the standard convention of having your section titles on the left and your page numbers on the right (by toggling it on) or showing the page numbers directly beside the section titles (by toggling it off).

Figure 43 –Table of Contents Menu (Insert Table of Contents option)

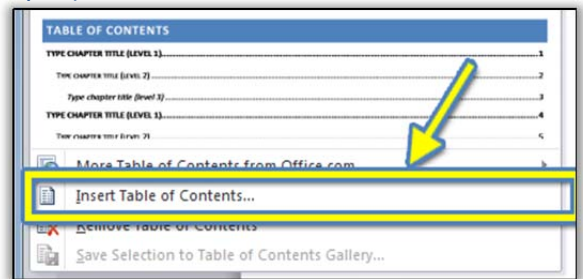
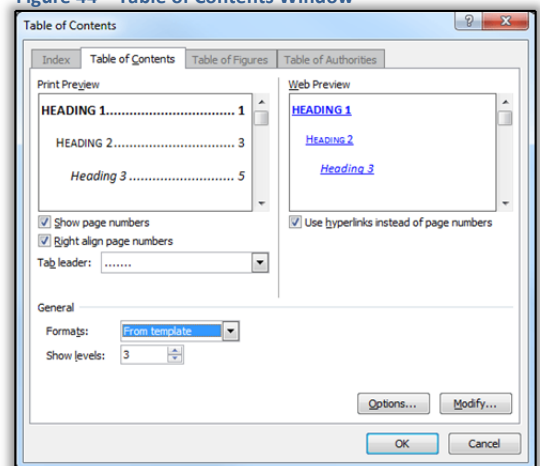


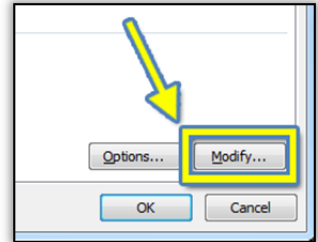
Figure 44 – Table of Contents Window



The Tab leader pull-down menu lets you choose what kind of tab leader you would like between your section title and its page reference (the default is dots).

- c. The General Section lets you choose from several **PREDEFINED VISUAL STYLES** for your table of contents (under “Formats:”), as well as how many levels you would like to see identified in your table of contents (under “Show levels:”).

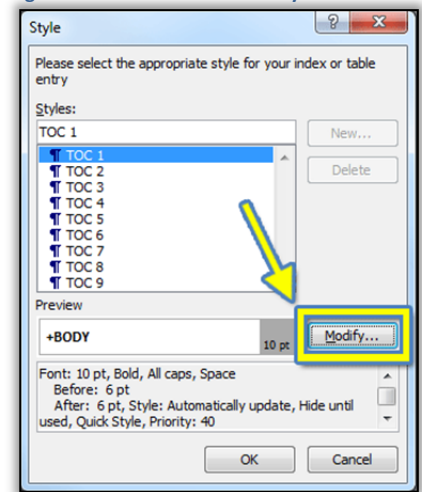
Figure 45 – Table of Contents Window (Modify button)



- d. To **MODIFY THE FORMAT OF YOUR TABLE OF CONTENTS**, click the Modify button in the bottom-right of the Table of Contents Window (see Step 3 for instructions on how to open this window).

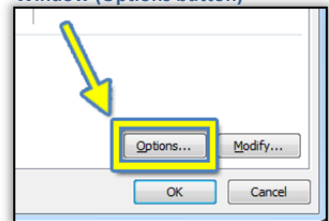
- e. This opens the **TABLE OF CONTENTS STYLES WINDOW**. This window lists all of the styles associated with your table of contents and allows you to edit them (TOC1, for example, applies to the highest level of information in your table of contents. TOC2 applies to the second highest level). To modify the format of a style, select the one you wish to edit, and click the Modify button.

Figure 46 – Table of Contents Styles Window



- f. This opens the **MODIFY WINDOW** associated with styles. See Section 2.3, Steps 4 and 5 for instructions on how to use the options in this window.

Figure 47 – Table of Contents Window (Options button)

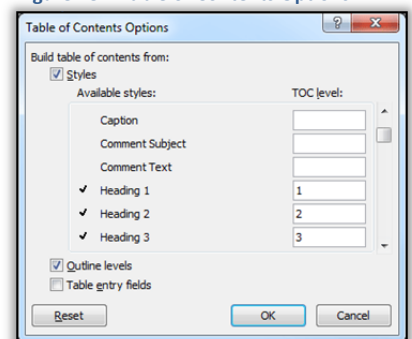


- g. To **CHANGE THE TYPES OF STYLES THAT ARE INCLUDED** in the table of contents, in the Table of Contents Window (see Step 3 for instructions on how to open this window) click the “Options...” button.

5. This opens the **TABLE OF CONTENTS OPTIONS WINDOW**.

- a. The Available Styles section lists all styles active in the document. The ToC level column indicates the level at which the associated style will appear in the table of contents. To add a style, enter the number of the level at which you want it to appear in the TOC level column. For example, if you want fourth level headers included, enter a “4” in the TOC level field next to the name of the style you used to format those headers.

Figure 48 – Table of Contents Options



- b. When you are done, click the OK button to close this window.

8. When you are satisfied with your settings, **CLICK THE OK BUTTON** in the Table of Contents window to close the window. Word automatically creates a table of contents based on the styles you have chosen and inserts it at the location where you left your cursor in Step 1.
 - c. If you notice that a header you expected to see included is not there, navigate to that text in your document and **ENSURE THAT IT IS USING ONE OF THE STYLES YOU CHOSE FOR INCLUSION**. Section 3.3 includes instructions on how to update the table of contents.

3.3 – UPDATING A TABLE OF CONTENTS

Once you have created your table of contents, Word will automatically update it every time you save or open the document. Word also makes it possible to update the table in between saves if necessary (typically, to review the table for completeness and correctness after adding content to the document).

PROCEDURE

1. **RIGHT CLICK** anywhere on your table of contents to display the Quick Access Menu (see Figure 49).
2. Click the **UPDATE FIELD OPTION**.
 - a. Word updates the table of contents to include any new text formatted with the applicable styles, as well as updates the page numbers for all references.
3. **TROUBLESHOOTING:**

Figure 49 – Table of Contents Quick Access Menu

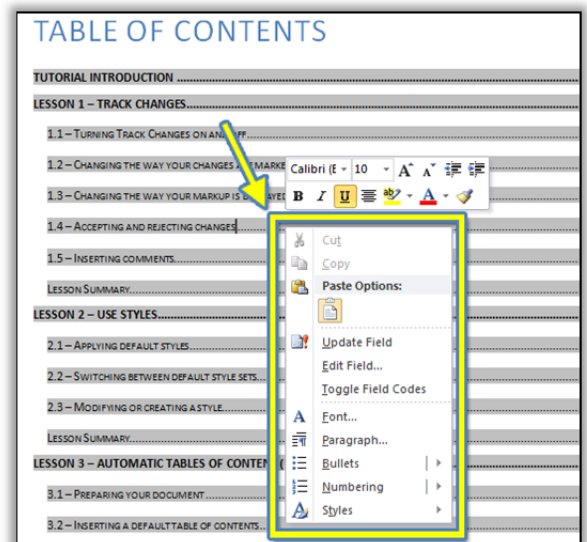


Figure 50 – Update Table of Contents Dialogue Box

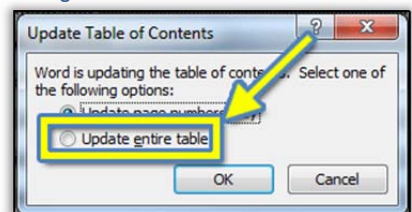
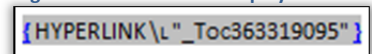


Figure 51 – Field Codes Displayed



- a. If you see the dialog box shown in Figure 50, select **“UPDATE ENTIRE TABLE”** and click the OK button.
- b. If one of the lines in your table changes to display text that resembles Figure 51, it means you accidentally clicked the “Toggle Field Codes” option on the Quick Access Menu. To correct it, open the menu again and click the **“TOGGLE FIELD CODES”** option.

LESSON SUMMARY

In summary, using the Table of Contents function in Word is an easy way to ensure your document has a complete, professional looking, and accurate table of contents. If you are satisfied with three levels of headings in your table of contents, you can use Word's default tables; or, if you need a simpler or a more complex table, you can easily create your own, including customizing your format and selecting as many or as few levels as you need. Word keeps the table up to date with the current page numbers and relevant section titles. It will update the table automatically when you save or open the document, and you can force an update with two clicks of your mouse if you need to review in between. Using an automated table of contents prevents the need to manually create and format one, and significantly reduces the risk of errors of omission or incorrect page references.

The table of contents discussed in this section are dependent on consistent application of styles in your document. Make sure to review Lesson 2 if you are having difficulty with applying the correct styles.

TEST YOUR KNOWLEDGE

Answer the following questions:

1. What is the difference between the two types of default tables of contents offered by Word?
2. What option should I select from the Table of Contents Menu if I wish to insert a custom table of contents?
3. What option should I select from the Quick Access Menu (opened by right clicking on the table of contents) in order to update my table of contents?

EXPLORE FURTHER

This lesson covers the basics of these functions; however, if you would like to explore some advanced functions you can:

- Experiment with building a table of contents from table fields instead of styles (hint: look up the TC and TOC field codes in Word's help file);
- Experiment with other types of reference tables (e.g., a table of figures, or an index); or
- Right click on one of the automatic tables of contents options in the Table of Contents Menu and select "Edit Properties" from the Quick Access Menu; explore the properties.

LESSON 4 – FORMATTING IMAGES

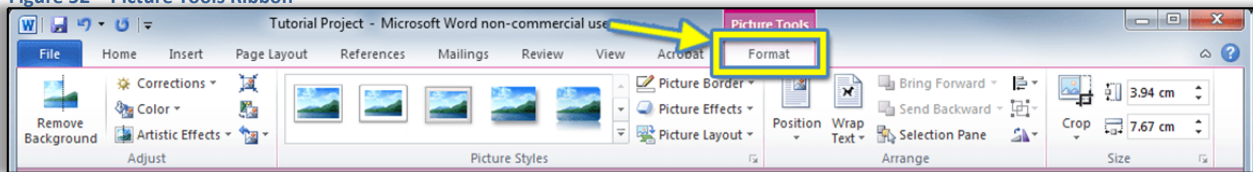
FUNCTION OVERVIEW: This lesson focuses on three formatting options for images that will result in clean, clearly identified, well-placed visuals, and one decorative formatting option that you can use to establish a consistent visual style.

Clean and consistently formatted visuals make a document look professional, and increase reader comprehension. Additionally, proper placement and labeling of your visuals help organize the information and assist a reader in navigating your document.

LESSON GOALS: By the end of this lesson, you will know how to crop an image, wrap your text around it in various ways, give your image a caption, and put a border around your image.

NOTE: Unless otherwise specified, you will perform the procedures described in Lesson 4 using commands and icons located on the Picture Tools Ribbon. To open the References Ribbon, you must first select the image you wish to format (the ribbon is a special reactive one and is not visible by default). Once you have selected your image, you will see a new tab appear at the top of your interface labeled “Format”. Click the Format Tab (see the yellow square in the following image) to open the Picture Tools Ribbon. You will see the following groups and major icons (with some variation possible based on your resolution):

Figure 52 – Picture Tools Ribbon



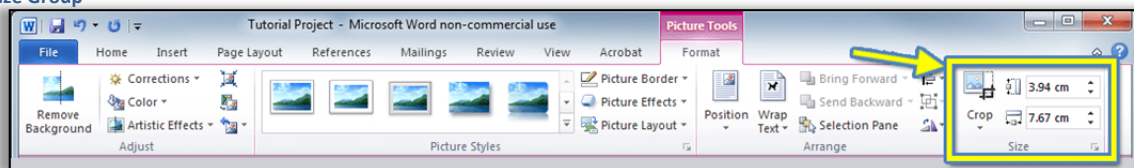
4.1 – CROPPING AN IMAGE

Cropping an image allows you to show only the most relevant parts of it. For example, many of the images in this tutorial are only a small part of a much larger image of the entire Word interface. In each case, the author cropped the image to show only the part that mattered (e.g., the menu or the window under discussion).

PROCEDURE

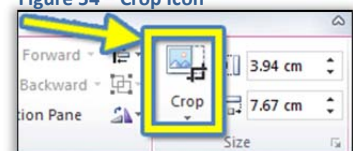
1. Locate the **SIZE GROUP** of the Picture Tools Ribbon (remember: in order to access the Picture Tools Ribbon you must have your image selected).

Figure 53 – Size Group



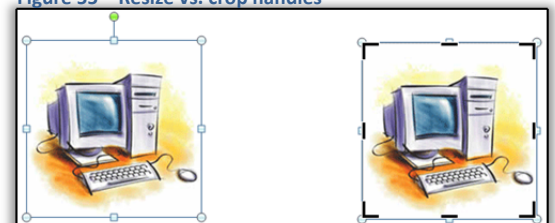
2. Click the **CROP ICON**.

Figure 54 – Crop Icon



3. When you click the Crop icon, you will notice that the “handles” on the image you have selected change from the circles used to resize the image, to the lines and angles used to crop the image. This means that the **CROP FUNCTION IS ACTIVE**.

Figure 55 – Resize vs. crop handles



4. Cropping a picture works the same way as resizing it. **CLICK AND DRAG** the black handles to resize the crop (i.e., the area that you wish to display). Any areas of the picture you wish to delete should be outside this crop area. Figure 56 shows a crop in progress. Word deletes the greyed out areas and the image inside the black handles will remain.

5. **PRESS THE ESCAPE KEY** on your keyboard when you are done and Word completes the crop.

Figure 56 – Crop area

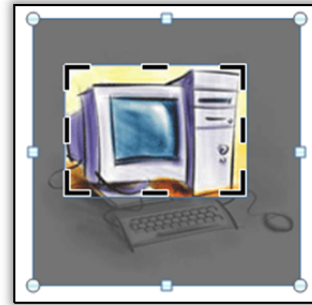


Figure 57 – Cropped image



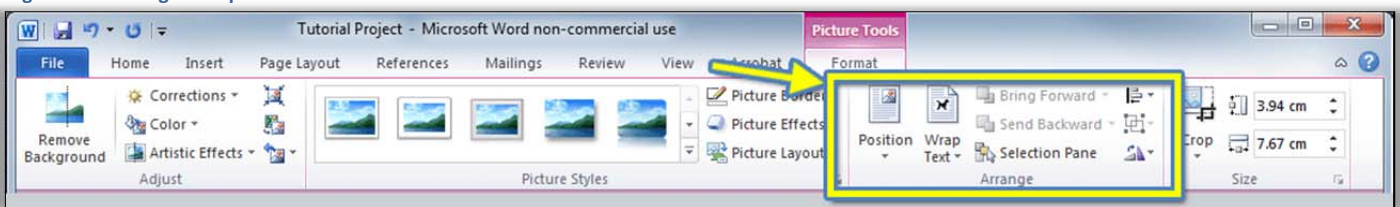
4.2 – WRAPPING TEXT AROUND AN IMAGE

Depending on the visual design of your document, you may need to change the way your text interacts with your image – Word refers to this as wrapping the text. Text wrapping has a major impact on your page layout, and proper use of it can help a reader understand how the text and your visuals relate to each other.

PROCEDURE

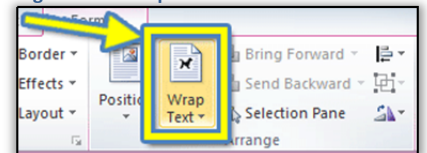
1. Select your image and locate the **ARRANGE GROUP** of the Picture Tools Ribbon.

Figure 58 – Arrange Group



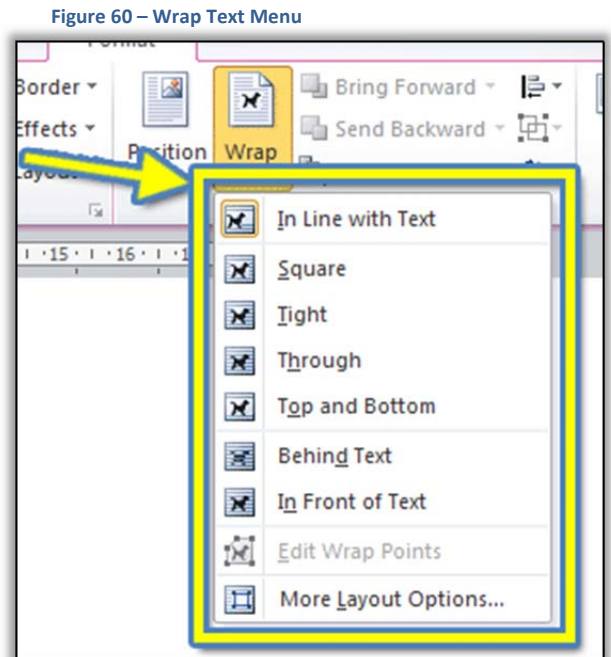
2. Click the **WRAP TEXT ICON**.

Figure 59 – Wrap Text Icon



3. This opens the **WRAP TEXT MENU** (see Figure 60). The Wrap Text Menu offers you several options to control how your visuals and your text interact.
 - a. **IN LINE WITH TEXT** treats your image like a very large character of text. It makes it part of your sentence and you can have letters or words on either side of it.

- b. **SQUARE** arranges the text around the borders of your image (as long as the edges of the image are within the margins). In other words, a line of text that starts on one side of the image completes on the other side.
- c. **TIGHT** arranges the text the same way that Square does; however, the space between the image and the text is much smaller, and if the image is irregularly shaped the text follows that shape.
- d. **THROUGH** works the same as Square; however, it gives you access to the “Edit Wrap Points” option. This allows you to customize exactly where the text wraps around the image – extending it out past the actual image, or allowing text to move over top of some parts of the image but not others.
- e. **TOP AND BOTTOM** keeps the text above or below the image – it does not allow text to wrap to the right or left of the image.
- f. **BEHIND TEXT** moves the image behind the text (like a background), so that the text appears over top of it.
- g. **IN FRONT OF TEXT** moves the image in front of the text, such that you cannot see the text behind the image.



- 4. Locate the option that best serves your needs, and then **CLICK ON IT TO APPLY** it to the image. You can then move your image around the text to find the best location for it.

4.3 – CAPTIONING AN IMAGE

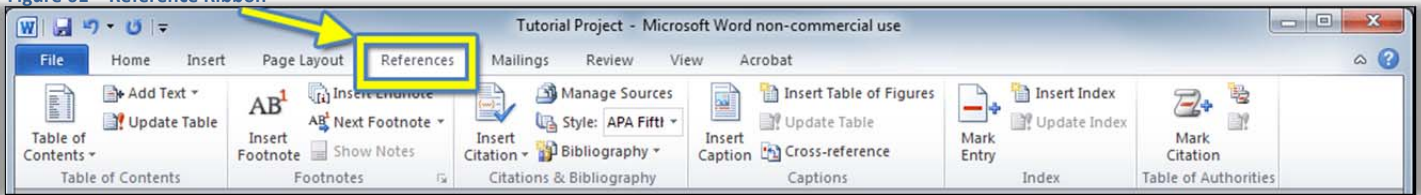
Word offers a captioning function that allows you to label your images quickly and consistently. Image captions help to organize your information and assist readers in navigating your document. Additionally, though not covered by this lesson, captioning your images using Word’s Captioning Function allows you to include them in automated references (such as tables of contents, or tables of figures).

PROCEDURE

- 1. Select the image you wish to caption.

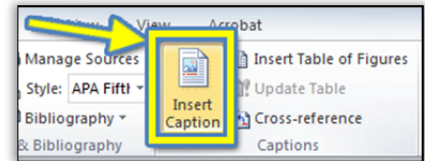
2. Click the **REFERENCES TAB** to open the References Ribbon.

Figure 61 – Reference Ribbon



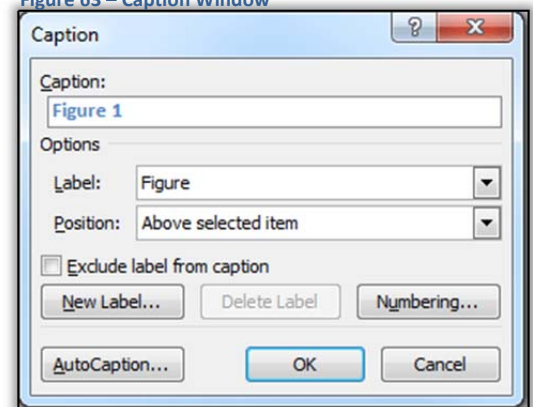
3. Click the **INSERT CAPTION ICON**, in the Captions Group.

Figure 62 – Insert Caption Icon



4. This opens the **CAPTION WINDOW**.

Figure 63 – Caption Window

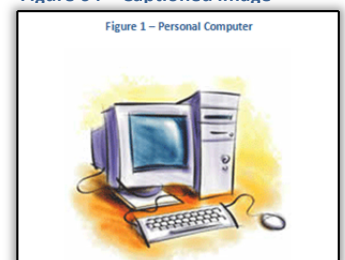


- a. Use the **LABEL PULL-DOWN MENU** to choose the type of label you would like to use (Figure, Table, Equation), or click the “New Label...” button to create a custom label.
- b. If you **DO NOT WANT TO USE A LABEL** as part of your caption, click the “Exclude label from caption” checkbox until the checkmark appears.
- c. Use the **POSITION PULL-DOWN MENU** to choose whether the caption should appear above or below your image.
- d. To customize your caption, enter the desired text in the **CAPTION TEXT BOX** at the top of the window, or manually enter it after you click OK.

5. When you have finished, **CLICK OK**.

- a. Note that the caption is inserted using the **CAPTION STYLE**, which you can customize like any other style to suit your visual design. See Lesson 2.3 for instructions on how to modify a style.

Figure 64 – Captioned image



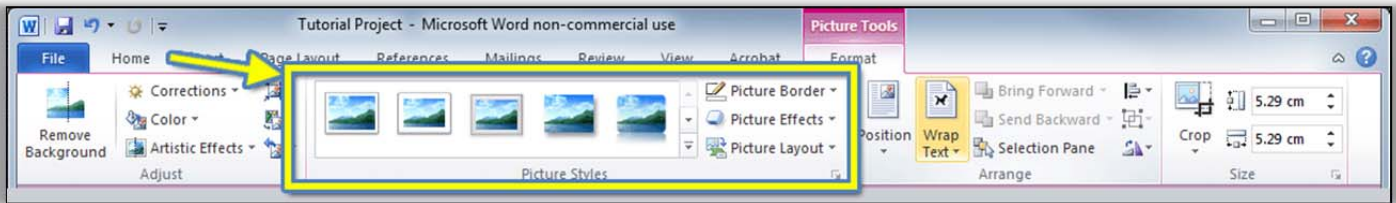
4.4 – INSERTING A BORDER

While Word has many decorative formatting options, this task will provide instructions on how to use the most basic one – a border around your image. Formatting such as borders can be used to create a unique and consistent visual style, adding to the visual coherency of your document, and assisting with branding efforts (e.g., using a company-standard colour scheme). It can also help offset images from text.

PROCEDURE

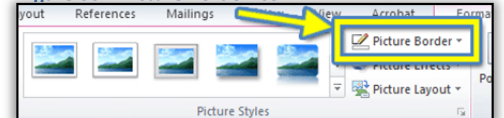
1. Select the image you wish to format with a border, and then locate the **PICTURE STYLES GROUP** of the Picture Tools Ribbon.

Figure 65 – Picture Styles Group



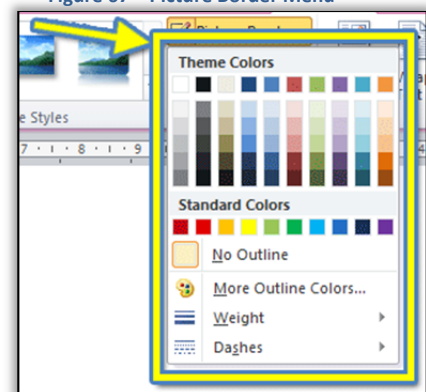
2. Click the **PICTURE BORDER ICON**.

Figure 66 – Picture Border Icon



3. This opens the **PICTURE BORDER MENU**. To apply a border to your image, click the colour that you wish your border to be. Open the menu again to customize other elements of the border by mousing over the options in the Picture Border menu. “Weight” provides options for line thickness, and “Dashes” provides options for line style (e.g., dotted or solid).

Figure 67 – Picture Border Menu



- a. Figure 68 depicts different types of borders – make sure to choose a style that best suits your document and use it consistently.

Figure 68 – Image border samples



LESSON SUMMARY

In summary, formatting your images is just as important as formatting your text. Cropping your images allows you to focus the reader’s attention on the parts that matter, without distracting them with irrelevant visual information. Making careful decisions about how to wrap your text around the images can help you create an attractive and understandable page layout, and increase your readers’ understanding of the relationship between your visuals and the text. Captioning your images increases ease of navigation and helps to organize

your information. Finally, using borders (and other decorative formatting) can help create a consistent visual design that gives your document a professional look.

For the most part, functions relating to image formatting are found in the Picture Tools Ribbon, which can only be accessed by inserting and selecting an image. Captioning your images, however, is done through the References Ribbon.

TEST YOUR KNOWLEDGE

Answer the following questions:

1. What group of the Picture Tools Ribbon is the Crop Icon located in?
2. Which type of wrapping places text above and below the image?
3. On what ribbon is the Insert Caption Icon located?
4. What does Weight refer to, with regards to borders?

EXPLORE FURTHER

This lesson covers the basics of these functions; however, if you would like to explore some advanced functions you can:

- Experiment with other decorative formatting options under the Picture Effects menu in the Picture Tools ribbon (e.g., drop shadows, beveling, three dimensional effects);
- Combine what you learned in Lesson 3 with what you learned in this lesson about captions to create a table of figures; or
- Select the text below the Crop Icon and experiment with cropping to pre-set shapes.

TUTORIAL SUMMARY

WELCOME TO THE END OF THE TUTORIAL! YOU DID IT!

By this point, you have learned the basics of how to use the Track Changes and Commenting Functions, the Predefined Styles Function, the Automated Table of Contents Function, and a few functions related to formatting and organizing your visuals. These are very powerful tools in any technical writer's hands, yours included.

As discussed in Lesson 1, Track Changes will make your peer reviewing and peer editing projects much faster and easier:

- It provides a standardized customizable markup to meet the needs of your project and organization.
- It allows you the flexibility of displaying or hiding the markup as the situation requires without losing the record of your edits.
- When combined with the commenting function, it enables you to collaborate easily with writers and other editors.

As discussed in Lesson 2, Word's Predefined Styles Function serves two crucial purposes: to ensure consistency in your formatting across various categories of information, and to identify which text belongs to which categories. It:

- Enables you to change the formatting of all text within a specific category at once, or to make use of automated reference tables.
- Offers a number of "out of the box" style sets, that you can customize or modify to suit your needs, and allows you to create a new style from scratch.
- Allows you to change between style sets with only a few clicks, automatically changing the entire visual design of your document, without sacrificing visual consistency.

As discussed in Lesson 3, if you use the styles mentioned in Lesson 2, you can access Word's Automated Tables of Contents Function. Word offers two default formats for your table of contents, or you can create your own. It:

- Allows you to create a professional looking table of contents that updates automatically as your document changes.
- Keeps the table up to date with the current page numbers and relevant section titles.
- Prevents the need to manually create and format one, and significantly reduces the risk of errors of omission or incorrect page references.

Finally, as discussed in Lesson 4, formatting your images is just as important as formatting your text. Word's image formatting options:

- Enable you to make careful decisions about how to manipulate your image, how to control the relationship between your image and your text, and how to use decorative formatting options to enhance the reader's experience are all key parts of applying your visual design.
- Offer you a number of tools for applying those decisions to your document
- Enable you to improve the relevance of your images, the ease of navigation for your readers, and the usability and understandability of your images.

The four functions covered by this tutorial can make your life as a technical writing student much easier. They enable you to create professional-looking documents that meet the standards of consistent visual design, and they empower you to edit in a way that is clear, effective, and quick (both for you as the editor and you as the writer). Practice makes perfect, so begin leveraging your new knowledge in your projects as soon as you can, and don't be afraid to refer back to this tutorial or to Word's Help function (press F1) if you need a reminder!

APPENDIX – ANSWERS TO EXERCISES

LESSON 1 EXERCISES

1. In what group of the Review Ribbon, is the Track Changes icon located?
 - a. The Tracking Group
2. Is it possible to hide some types of edits, but display others?
 - a. Yes, using the Show Markup Pull-Down Menu
3. If you do not wish to lose your place in the document, which option should you choose from the Accept Changes Pull-Down Menu?
 - a. Accept Change
4. Where is the default location for Word to display comments?
 - a. In the margins (a grey section to the right of the main document)

LESSON 2 EXERCISES

1. How do you open the Styles Window?
 - a. Click the small diagonal arrow in the bottom right corner of the Styles Group
2. How does Word indicate which style set is currently active?
 - a. By showing a checkmark next to its name in the Style Sets Menu
3. What is the difference between the Create New Style from Formatting Window and the Modify Window?
 - a. The Style Type option is inaccessible in the Modify Window and cannot be changed

LESSON 3 EXERCISES

1. What is the difference between the two types of default tables of contents offered by Word?
 - a. The title of one is “Table of Contents” and the title of the other is “Contents”
2. What option in the Table of Contents Menu inserts a custom table of contents?
 - a. “Insert Table of Contents...”
3. What option should I select from the Quick Access Menu (opened by right clicking on the table of contents) in order to update my table of contents?
 - a. “Update Field...”

LESSON 4 EXERCISES

1. What group of the Picture Tools Ribbon is the Crop Icon located in?
 - a. The Size Group
2. Which type of wrapping places text above and below the image?
 - a. Top and Bottom
3. On what ribbon is the Insert Caption Icon located?
 - a. The References Ribbon
4. What does Weight refer to, with regards to borders?
 - a. The thickness of the line