



# Word 2013: Beyond the Basics

Workbook

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# Introduction

## Using Word effectively

This workbook takes you beyond the basics and introduces you to the tools you can use to format and customise your documents.

The features covered include:

- Formatting your document quickly with styles
- Applying numbered headings
- Formatting tables
- Including data from Excel
- Working with images and diagrams
- Structuring your document with section breaks and headers and footers
- Creating tables of contents and figures

## After the course

If, after you have been on the course, you want to work through the exercises again, you can download the practice files from our Documents Catalogue at:  
**[www.ed.ac.uk/is/skills/documents-catalogue](http://www.ed.ac.uk/is/skills/documents-catalogue)**

For information on our other training courses, see our website at **[www.ed.ac.uk/is/skills](http://www.ed.ac.uk/is/skills)**

# 1. Formatting text with styles

Text formatting helps your readers make sense of content, particularly in longer documents. Headings, for example, give structure by showing the relative importance of sections.

Rather than selecting text and applying attributes – font type, size etc. – you can make use of Word’s *styles* to format text quickly and easily.

## What is a style?

A style is a predefined set of formatting specifications. When you apply a style, Word will format the text according to how that style has been defined.

Using styles has several benefits:

- Consistency – text is always formatted in the same way
- Ease of modification – to change the appearance of text, simply modify the style and the text formatted with the style is updated to match
- Access to other features – styles allow you to make use of Word’s powerful automatic functions, such as tables of contents and cross-references

## Style types

Word includes a range of built-in styles. There are two main types:

**Paragraph** Applied to an entire paragraph. As well as text attributes such as font type, style and size, a paragraph style includes formatting such as spacing and alignment.

**Character** Applied to selected text. This style includes character formatting only.

Word also includes a *linked* style. A linked style can be applied to an entire paragraph or to selected text only. When you apply it to selected text, none of the paragraph formatting is used – it behaves like a character style.

Why use a linked style? It can be used to create ‘run-in’ headings, i.e. where only the first few words in a paragraph are formatted as a heading. You can also use it where you don’t want all of a heading to appear in a table of contents. Apply the linked style to the text to appear in the contents, and then manually format the rest of the text to match.

## Styles and navigation

If you have applied styles, you can make use of the **Navigation** pane to move around a long document quickly. Clicking on a heading in the pane will take you directly to the location, and you can also reorganise your document easily by dragging and dropping entire sections.

## Reusing styles

When you modify a style, or create a new style, the changes apply to the current document only.

If you want to use your styles in another document, the options are:

- Copy and paste the text
- Modify Word's default template
- Create a 'master' document
- Create a template

For instructions on all of these options, see the note *Formatting with styles in Word 2013* in our Documents Catalogue at [www.ed.ac.uk/is/skills/documents-catalogue](http://www.ed.ac.uk/is/skills/documents-catalogue)

## Task 1.1 Applying a style using the Styles gallery

Word displays some of the most commonly used styles in the **Styles** gallery on the **Home** tab.




This is a fast and easy way to apply formatting as you work.

### Try this...

1. Click on the **File** tab and select **Open**, click **Computer** and **Browse**, then navigate to the folder **Word 2013 ► Beyond basics ► Practice files** and open the file **Report\_1.docx**.
2. Make sure your cursor is in the text **Environmental impact report** on page 1. Do not select the text.
3. On the **Home** tab, move to the **Styles** gallery in the **Styles** group and click on the style called **Title** to apply it.

**Title** is a **paragraph** style; therefore the formatting is applied to the whole paragraph without you having to select the text first. Note that a 'paragraph' can be any length, even a single word.

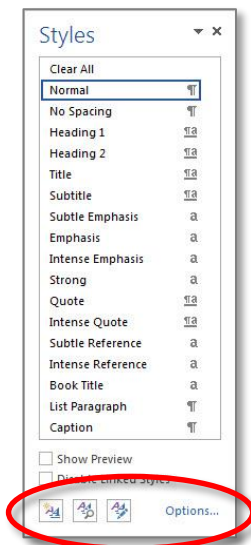
4. Move to page 3, click anywhere in the first paragraph – **AGE – Making a Commitment to the Environment** – and apply the style **Heading 1**.
5. In the paragraph below, select the text **Alpheius Global Enterprises**.
6. Click on the **More** button  at the **Styles** gallery to display the full list and apply the style **Strong**.

**Strong** is a **character** rather than a **paragraph** style; therefore it is applied to the selected text only.



## Task 1.2 Applying a style using the Styles pane


The Styles gallery is an easy way to apply styles. However, to see the full range of styles available, you need to use the **Styles** pane.



You can use **Options** to change what you see in the pane. You can choose a set of styles to display, and how to sort them.

Buttons at the bottom of the pane allow you to create new styles, inspect the formatting of a style and manage styles.

### Try this...

1. On the **Home** tab, click on the dialog box launcher  in the **Styles** group to open the **Styles** pane.
2. Click on **Options** at the bottom of the pane.
3. In the **Style Pane Options** dialog box, click on the down arrow at **Select styles to show**.

You have the following options:

<b>Recommended</b>	Word's predefined list of styles.
<b>In use</b>	Lists only the styles actually applied in the current document.
<b>In current document</b>	Lists the styles currently applied, as well as ones that have been used at some point.
<b>All styles</b>	Full list of styles.

4. Select **All styles** and click **OK**.
5. Scroll through the pane to see the range of styles available.

The **All styles** setting is difficult to work with, so you can choose to display only some of the styles available.

6. Click on **Options** again, then at **Select styles to show**, select **In current document**. Leave the dialog box open.
7. In **Select how list is sorted**, choose **Alphabetical**.

This makes it easier to locate a specific style name.

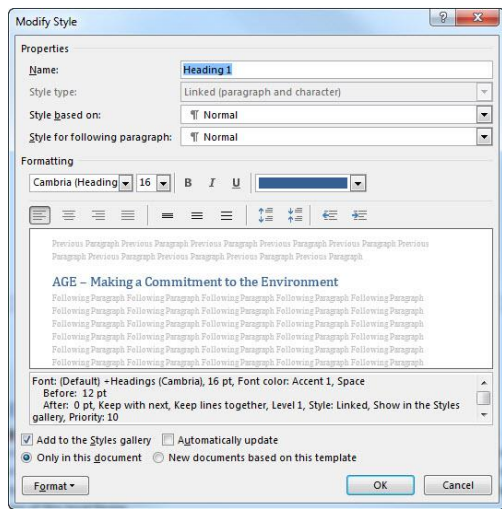
8. In **Select how built-in style names are shown**, check that **Show next heading when previous level is used** is selected.

*This setting means that when you apply a Heading style, the next level down appears in the **Styles** pane ready for use.*

9. Click **OK** to finish.
10. On page 3, click in the paragraph **Arachnids** and then click on **Heading 2** in the **Styles** pane.
11. Locate the three paragraphs **Spiders**, **Scorpions** and **Ticks & mites** and apply the style **Heading 3** to each.
12. Save the file in the current folder and then close it.

## Task 1.3 Modifying a style

If you do not like how a style looks, you can modify it through the **Modify Style** dialog box. All the text formatted with the style is updated automatically.



You can make basic changes in the **Formatting** section.

The **Format** button accesses the full range of formatting options.

### Try this...

1. Click on the **File** tab and select **Open**, click **Computer**.
2. Under **Current Folder**, open the **Practice files** folder and open the file **Report\_2.docx**.

*This document has more formatting applied.*

3. Move to page **3** and click in the heading **AGE – Making a Commitment to the Environment**.
4. Open the **Styles** pane if it is not already open and select **Show Preview** (if it is not already ticked).

*This will show you how the style will look when it is applied.*

5. Move your cursor to **Heading 1** in the **Styles** pane, click on the down arrow and select **Modify** to display the **Modify Style** dialog box.
6. Under **Formatting**, change the font type to **Arial** and the size to **18**.
7. Click on the **Format** button and choose **Paragraph**.
8. Under **Spacing**, use the spinner arrows to set **Before** to **0 pt** and **After** to **12 pt**.
9. Click on the down arrow at **Line spacing** and choose **Single**.
10. Click **OK** and **OK** again to finish.
11. Move your cursor to **Heading 2** in the **Styles** pane, click on the down arrow and select **Modify**.
12. Under **Formatting**, change the font type to **Arial** and set the size to **16**.

13. Click on the **Format** button and choose **Paragraph**.
14. Under **Spacing**, set **Before** to **0 pt** and **After** to **6 pt**.
15. Click on the down arrow at **Line spacing** and choose **Single**.
16. Click **OK** and **OK** again to finish.
17. Check how your headings have changed.

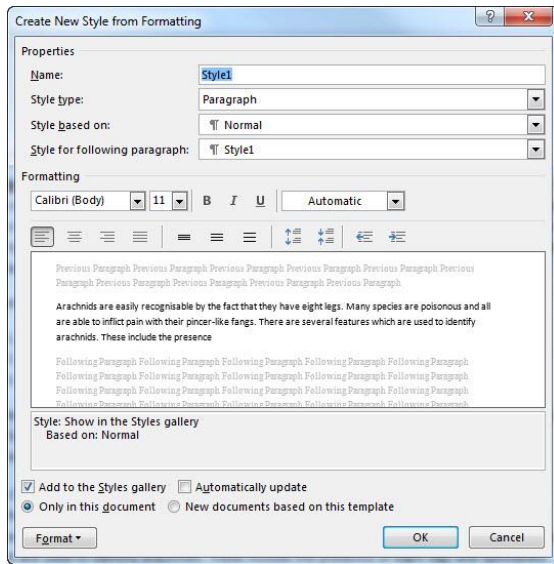


**Note:** By default, any changes you make to the styles apply to the *current document* only. If you want the changes to apply to every new document you create, click on **New documents based on this template** in the **Modify Style** dialog box. Use this option with caution – some formatting you may not want in every document.

## Task 1.4 Creating a style with New Style

If you find you are repeatedly formatting text in the same way, and there isn't a built-in style that suits, you can create a new style to do the formatting for you.


There are two ways to create a style: one which applies the style directly to the text, and another which simply makes the style available in the Styles pane. In this exercise, you will use the **New Style** option to apply the style directly.



Word uses the font attributes of the text your cursor is currently on as the basis for the new style.

You can then make whatever changes you want.

### Try this...

1. Open the **Styles** pane if it is not already open.
2. Click in the paragraph beginning **Arachnids are easily recognisable...** on page 3 and click **New Style**  at the bottom of the **Styles** pane to open the **Create New Style from Formatting** dialog box.
3. In **Name**, type **IntroPara**.
4. At **Style for following paragraph**, click on the down arrow and select **Normal**.

*This setting controls what happens when you finish typing your paragraph and press the **[Enter]** key. When you use your new style, the paragraph immediately after will be automatically formatted with Word's default paragraph style (called **Normal**).*

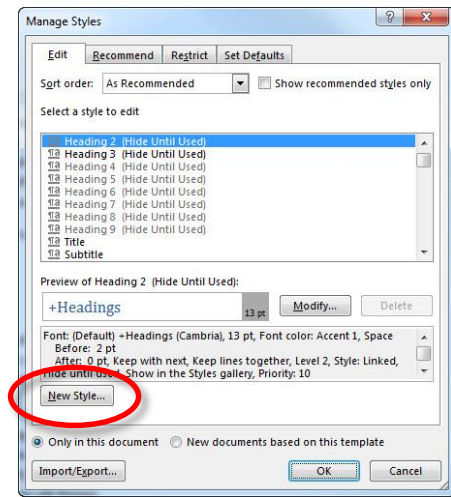
5. In the **Formatting** section, click on the **Italic** button.
6. Click on **Format** and select **Paragraph**.
7. Under **Indentation**, set **Left** and **Right** to **1 cm**.
8. Click **OK** and **OK** again.

*The new style is applied to the paragraph, and appears in the **Styles** pane and in the **Styles** gallery.*

9. Locate the first paragraphs after the headings ***Amphibians*** and ***Reptiles***, and apply the style ***IntroPara*** from the ***Styles*** pane.
10. Save your document.


## Task 1.5 Creating a style with Manage Styles

In this exercise, you will use the **Manage Styles** option to create a style that is not applied immediately to the text. This is useful when you need more than one set of heading styles, for example, one set with numbering and one without.



In the **Manage Styles** dialog box, the style to be used as the basis for the new style is selected. From here, you will use **New Style** to create an additional heading style.

### Try this...

1. Navigate to page **3**, click in the paragraph **Arachnids** and make sure it is formatted as **Heading 2**.
2. In the **Styles** pane, click **Manage Styles**  at the bottom.
3. Make sure **Heading 2** is highlighted and click **New Style** to display the **Create New Style from Formatting** dialog box.
4. In the **Name** box, type **AppendixHeading**.
5. At **Style based on**, select **(no style)**.

Since you are going to modify your Heading styles later to apply numbering, selecting **(no style)** here will prevent the numbering being applied to the new AppendixHeading style as well.

6. At **Style for following paragraph**, select **Normal**.
7. Click the **Format** button and select **Paragraph**.
8. Under **Spacing**, set **After** to **6 pt**.
9. Click on the down arrow at **Line spacing** and choose **Single**.
10. Click **OK** and **OK** again to finish.
11. Click **OK** to close the **Manage Styles** dialog box.

The style now appears in the **Styles** pane ready for use.

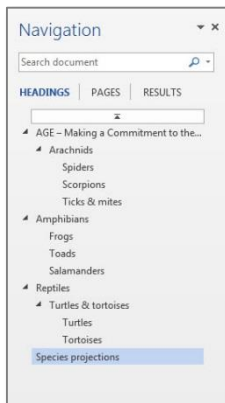
12. Hold down **[Ctrl]** and press **[End]** to move to the end of the document and scroll up till you see the text ***Groups and Societies***.
13. Apply the style ***AppendixHeading*** to the paragraphs ***Groups and Societies***, ***Organisation Chart*** and ***Further Information***.



## Task 1.6 Using the navigation pane

If you have applied Word's built-in Heading styles, you can make use of the **Navigation** pane to help you move around a long document quickly.

In the pane, you can:





- Click on a heading to jump directly to the location
- Collapse and expand sections by clicking on the arrow symbol
- Reorganise your document by dragging a heading to a different location – Word moves both the heading and its content

### Try this...

1. Click on the **View** tab, and in the **Show** group, click the **Navigation Pane** checkbox to select it.
2. In the **Navigation** pane, click on **Salamanders** to jump to the location.
3. In the **Navigation** pane, hold down the mouse button on the heading **Salamanders** and drag it between **Frogs** and **Toads**.

*A black line indicates where the text will be placed.*

4. Release the mouse and check that the text has moved in the document.
5. Drag the **Salamanders** heading back to its original location after **Toads**.
6. Click on  at the top of the list of headings in the pane to go to the beginning of the document.
7. Click on the **Close** button  to close the **Navigation** pane.



**Note:** Only text formatted with the styles **Heading 1** to **Heading 9** is displayed in the navigation pane. Text formatted with other styles, such as your new style **AppendixHeading** does not appear.

## 2. Creating lists

Word includes three list types:

- |                   |   |
|-------------------|---|
| <b>Bulleted</b>   | Bulleted list items have no significant order, and are preceded by a symbol.                                |
| <b>Numbered</b>   | Numbered list items have a sequence or priority, and are preceded by a number or a letter.                  |
| <b>Multilevel</b> | Multilevel list items can have numbers, bullets, or a mixture of both, and follow a hierarchical structure. |

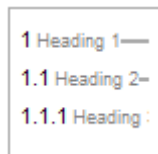
Word includes libraries of predefined list layouts you can choose from.

### Creating numbered headings

The most common use for a multilevel list is to apply numbering to headings. A typical layout is in the format:

1. Heading
  - 1.1 Heading
    - 1.1.1 Heading
    - 1.1.2 Heading
  - 1.2 Heading
2. Heading
  - 2.1 Heading

For the most reliable numbering, use a multilevel list that is linked to the built-in Heading styles. In the List Library these will include the style name, for example:

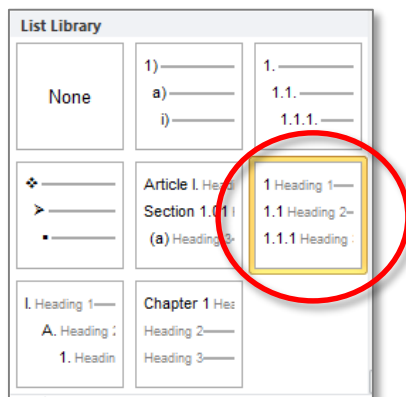


To apply the numbering, apply the appropriate style to the text.

If the number format is not exactly what you want, you can customise it as you require.


## Task 2.1 Creating numbered headings

If you have applied the built-in Heading styles, then numbering is easy. To number your headings, select a predefined numbering layout from the **Multilevel List Library**.



Choose a layout that has already been set up to link to the built-in Heading styles, as in the example shown. You can customise it later if the number format is not exactly what you want.

### Try this...

1. Move to page **3**, click anywhere in the heading **AGE – Making a Commitment to the Environment** and make sure it is formatted as **Heading 1**.
2. Click on the **Home** tab, and in the **Paragraph** group, click on the down arrow at **Multilevel List** .
3. In the **List Library**, select the numbering option **1, 1.1, 1.1.1** linked to the **Heading** styles (second row, as indicated in the image above).
4. Scroll through the document examining your headings.

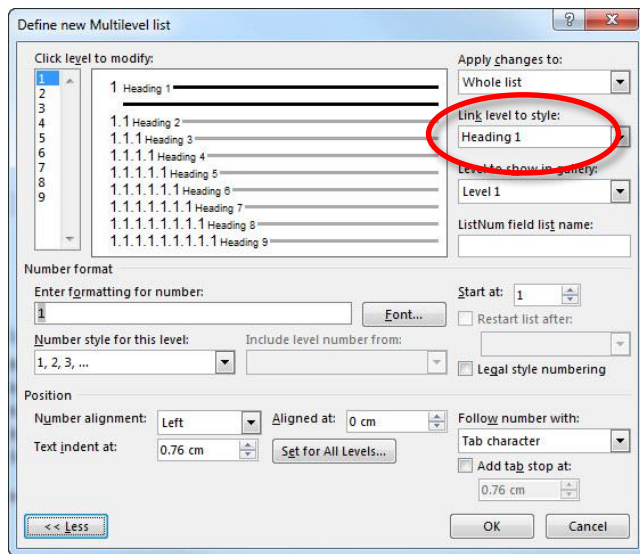
*Numbering has been applied automatically to all the headings formatted with the built-in Heading styles.*

5. Open the **Styles** pane if it is not already open.
6. Move to page **6** and click in the paragraph **Turtles & tortoises**.
7. Apply the **Heading 3** style from the **Styles** pane or the **Styles** gallery.
8. Apply the **Heading 4** style to the two paragraphs **Turtles** and **Tortoises**.
9. Click in the paragraph **Species projections** and apply the **Heading 1** style.

*The headings are numbered automatically. To apply numbering to a heading, all you need to do is apply the appropriate style.*

## Task 2.2 Modifying numbered headings

To change the format and position of the numbering in a multilevel list, you *must* use the **Define new Multilevel list** dialog box.



From here, you can modify the number format and style, and change indentation settings for both number and text.

The **Link level to style** option tells Word which style to use to format the text at each level. If you have selected a list that is already linked to the built-in heading styles, then level 1 is linked to Heading 1, level 2 to Heading 2 etc.

### Try this...

1. Move to page **3** and click in the heading **AGE – Making a Commitment to the Environment**.
2. Click on the down arrow at **Multilevel List** and select **Define New Multilevel List** from the menu at the bottom to display the **Define new Multilevel list** dialog box.
3. Click on **More>>** to display all options.
4. In **Click level to modify**, ensure **1** is selected.

*Note that **Heading 1** is displayed in **Link level to style** on the right. Each of the nine levels of numbering is linked to its corresponding Heading style.*

5. In **Enter formatting for number**, click in front of the grey highlighted field, type **Section** and press the space bar.
6. Click **OK** and check the heading.

*The word 'Section' is now part of the number format. Note that the second line of the heading is indented. You can change this setting to make the heading wrap at a different position.*

7. Make sure your cursor is in the heading **AGE – Making a Commitment to the Environment**.
8. Click on the down arrow at **Multilevel List** and select **Define New Multilevel List** again.
9. Click in **Text indent at** and type **3.5**.

10. Click **OK**.

*The second line of the heading is now lined up with the text on the first line at the indentation setting you entered. (Note that if you don't want the second line indented at all, you can set **Text indent at** to 0.)*

11. Make sure your cursor is still in the heading **AGE – Making a Commitment to the Environment**.

*Whenever you make a change, always make sure your cursor is in the top level (i.e. Heading 1), even if it's another level you are editing. This helps ensure that changes are applied immediately, and that your numbering does not break.*

12. Click on the down arrow at **Multilevel List** and select **Define New Multilevel List** again.

*If you do not want every heading to be numbered, you can remove numbering for a specific level. You will now remove the numbering for level 4.*

13. In **Click level to modify**, click on **4**.

14. In **Link level to style**, click on the down arrow and select **(no style)**.

15. Click **OK** to finish, scroll to page **6** and examine the formatting for your level 4 headings (**Turtles** and **Tortoises**).

*The level 4 numbering is no longer associated with the Heading 4 style; therefore the headings are still formatted as Heading 4, but are no longer numbered.*

16. Close the **Styles** pane and save your document.



Never try to modify indentation or tab settings in a list through the **Paragraph** options on the **Home** tab. This will only change settings for the line you are on, not the whole sequence. *Always* use the **Define new Multilevel list** dialog box to make changes.

## 3. Working with tables

If you need to present information in rows and columns, the most effective method is to use a table. Even if you only need a few rows or columns, tables are easier to work with than tabs.

Word includes options for creating basic tables you can format yourself, or you can choose from a library of predefined styles.

### Formatting and structuring your table

If you have created a basic table, you can use the **Table Tools Design** tab to change the formatting. You can apply a built-in format from the **Table Styles** gallery, or apply your own shading and borders.

You can change the structure of your table through the **Table Tools Layout** tab. There are tools to insert and delete rows and columns, merge and split cells and change the alignment of text.

### Inserting data from Excel

Although Word does include an option to create formulas in a table, it is much easier to perform any calculations in Excel, and then copy and paste the cells into your document.

To insert the Excel data, you can use a simple copy and paste. However, you can also insert the content as a *linked object*. You can use Word's **Paste Options** gallery or **Paste Special**. This allows you to continue to work with the content in the source application. If you edit the data in the source file (Excel), the destination file (Word) is updated as well.

If you use **Paste Special**, you can choose from a variety of formats, including **Microsoft Excel Worksheet Object**, **Formatted Text (RTF)** or **Picture (Enhanced Metafile)**. Each format behaves differently when pasted. If you choose the worksheet object, you can double-click on the object in Word to open Excel directly; if you choose the formatted text or picture options, you have to launch Excel and open the file if you want to make changes.

The disadvantage of linking is that if you move or rename the source file, the link will break, generating an error message. When you have finished editing your Excel file, you can break the link yourself, which will avoid the messages. Once the link is broken, however, it cannot be reinstated.

## Task 3.1 Formatting a table

You can change the appearance of a table quickly by using the **Table Tools Design** tab.



Word includes a range of preformatted **Table Styles** to choose from. You can also add additional formatting, such as borders or shading.

### Try this...

1. With **Report\_2.docx** open, navigate to page **6** and click in the table at the bottom.
2. Click on the **Table Tools Design** tab.
3. In the **Table Styles** group, click on the **More** button to display the gallery.
4. Click on **Grid Table 4 – Accent 1** (4<sup>th</sup> row, 2<sup>nd</sup> column) to select it.
5. In the **Table Style Options** group, click **Banded Rows** to deselect it.

*The table formatting has now changed so that it no longer displays alternately shaded (banded) rows.*

6. Click on the **Table Tools Layout** tab.
7. In the **Cell Size** group, click on **AutoFit** and select **AutoFit Window**.

*The table resizes to fit the page (the page is the table's 'window').*

8. Click in the *top* row of the table.
9. In the **Data** group, click on **Repeat Header Rows**.
10. Scroll down so that you can see the rest of the table.

*Note that the header row now repeats on each page. This makes the table data easier to read.*



**Tip:** If you want to use more than one row as a header, select the rows first, and then click **Repeat Header Rows**.


## Task 3.2 Creating a linked table with Paste Options

If you want to include data from an Excel worksheet in your document, the simplest method is to copy and paste. However, if you are still working on your Excel figures, you can create a *link* between the worksheet and your Word document. If you update the worksheet (the source file), the Word document (the destination file) is updated as well.



The **Paste Options** gallery allows you to choose different paste methods. Choose **Link & Keep Source Formatting** or **Link & Use Destination Styles** to create a linked object.

### Try this...

1. With the document *Report\_2.docx* open, click on the **File** tab.
2. Click on **Open File Location** at the bottom right of the screen and double-click on the file *species\_data.xlsx* to open it.
3. Hold down the mouse button and drag from cell **A6** to cell **F12**.
4. On the **Home** tab, in the **Clipboard** group, click on **Copy** (or press **[Ctrl]** and **[C]**) to copy the data to the clipboard.
5. Use the Word icon on the taskbar at the bottom of the screen to open *Report\_2.docx*.
6. Click on the left arrow at the top of the **File** menu to return to editing your document.
7. Click in the blank line after the text **Table B** on page 7.
8. On the **Home** tab, click on the *down arrow* at **Paste** in the **Clipboard** group to bring up the **Paste Options** gallery. 
9. Move your cursor over the options to see how the pasted object will appear.
10. Click **Link & Use Destination Styles**.

*This creates a linked table using your Word document's default table style. You can format it like any other Word table.*

11. Click in the table and on the **Table Tools Design** tab.
12. From the **Table Styles** gallery, under **Grid Tables**, select **Grid Table 4 – Accent 1** (4<sup>th</sup> row, 2<sup>nd</sup> column).
13. In the **Table Style Options** group, click **Banded Rows** to deselect it.
14. Open the Excel file and enter data in the **2 Years** column as follows: Arachnids – **102,500**; Amphibians – **5,900**; Reptiles – **8,100** then click in the **Total** cell.



15. Return to your document in Word.
16. If the data has not updated automatically, right-click in the table and select **Update Link**.

*The new figures should appear in the table.*

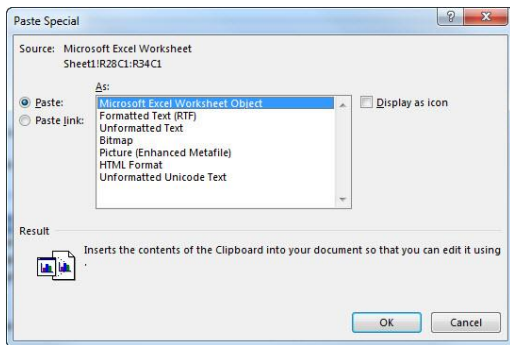
17. Click anywhere in the table and on the **Table Tools Layout** tab.
18. In the **Rows & Columns** group, click on **Delete** and select **Delete Table**.



**Note:** In a linked table, only cells within the original copy range will be updated. If you insert rows or columns in the Excel file, you will have to repeat the copy and paste with the new range.

## Task 3.3 Creating a linked table with Paste Special

An alternative method of creating a linked object is to use the **Paste Special** option. This gives you a range of paste formats.



The most common formats are **Microsoft Excel Worksheet Object** and **Formatted Text (RTF)**. You can also paste in the object as a picture; however, the image editing tools will not be available.

### Try this...

1. Use the Excel icon on the taskbar to return to the file *species\_data.xlsx*.
2. Copy the range **A6** to **F12** again.
3. Return to your document in Word.
4. Click in the blank line below the text **Table B**.
5. On the **Home** tab, click on the down arrow at **Paste**.
6. Choose **Paste Special** from the menu at the bottom.
7. On the left, click **Paste link** to select it.
8. Click on **Microsoft Excel Worksheet Object** and click **OK**.
9. Double-click on the table in Word to open the Excel file.

*Pasting the link as an 'object' allows you to open the source file directly from the document without having to open the application.*

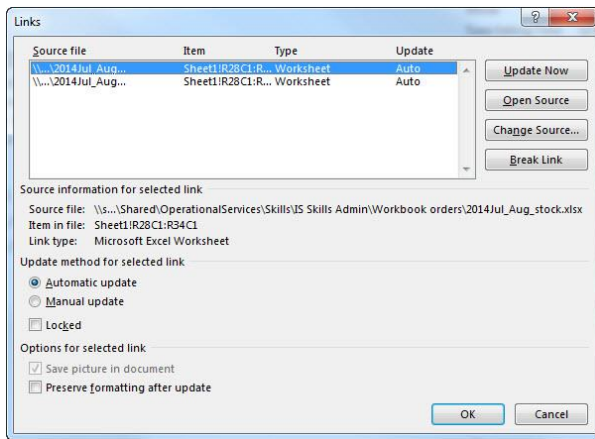
10. Enter data in the **3 Years** column as follows: Arachnids – **96,800**; Amphibians – **4,600**; Reptiles – **8,700** then click in the **Total** cell.
11. Return to your document in Word.
12. If the data has not updated automatically, right-click in the table and select **Update Link**.



**Note:** You cannot format a **Microsoft Excel Worksheet Object** as a table. If you want to be able to do this, choose the **Formatted Text (RTF)** option instead or use one of the **Link** options from the **Paste Options** gallery.

## Task 3.4 Breaking links

If you send a file containing linked objects to others, the links will break. Although the recipients will still be able to read and edit the Word document, they will receive error messages when it is opened. To avoid this, you can break the links manually through the **Links** dialog box.



If you have several links, they are listed in the order they appear in the document.

### Try this...

1. With your Word document open, click on the **File** tab.
2. On the **Info** screen, click on **Edit Links to Files** at the bottom right to display the **Links** dialog box.

*If the **Edit Links to Files** option does not appear, you have not copied the object as a link.*

3. Hold down **[Shift]** and click on both the link entries to select them.
4. Click on **Break Link**, then on **Yes** to confirm.

*With the links broken, any changes you make to the Excel file will not be reflected in the Word document; however you can now send the document without recipients receiving error messages.*

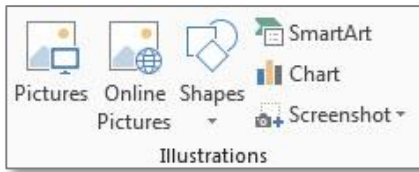
5. Click on the left arrow to continue editing your document.



**Note:** If you delete a linked object from your document, you need to break the link as well. Simply deleting the object does not remove the link, which is why you can see two links in the dialog box. If you don't break the link, Word will display a prompt to update the object even though it is no longer there.

## 4. Working with images

You can insert images into your document from Microsoft's Office.com gallery, or use files you have sourced yourself. Word supports a wide range of formats. Images are inserted from the **Illustrations** group on the **Insert** tab.



Use **Pictures** to insert a file and **Online Pictures** to search for clip art.

Once you have inserted a picture, you can make changes with Word's image editing tools on the **Picture Tools Format** tab. Images can be cropped, rotated and re-coloured. Word also includes a range of effects and styles that you can apply.

### Image sources

If you are looking for a specific image, there are a number of online libraries you can try:

<b>Flickr Creative Commons</b>	Free photography. You must include an attribution.	<a href="https://www.flickr.com/creativecommons/">https://www.flickr.com/creativecommons/</a>
<b>Getty Images</b>	Images, video and music. There is a charge for the service.	<a href="http://www.gettyimages.co.uk/">http://www.gettyimages.co.uk/</a>
<b>iStockphoto</b>	Wide range of photographs, audio and video. Small charge required.	<a href="http://www.istockphoto.com/">http://www.istockphoto.com/</a>
<b>JISC MediaHub</b>	Free images for use in learning, teaching and research only.	<a href="http://jiscmediahub.ac.uk/">http://jiscmediahub.ac.uk/</a>
<b>IS image databases</b>	Information Services Library resources – list of image databases.	<a href="http://edin.ac/11ToMU3">http://edin.ac/11ToMU3</a>

### Copyright issues

If you are using an image other than one you have created yourself or have sourced from a library, make sure you are aware of the copyright restrictions. If you have seen a picture on a website that you like, using the browser's **Save Target As** and **Save Picture As** options to make a copy is likely to be breaching copyright.

### Placing images: inline versus floating

When positioning images, they can be either 'inline' or 'floating'. An inline image becomes part of a paragraph and can't easily be dragged around the page. All images inserted into a document are inline by default.

A floating image can be dragged anywhere on the page, and text will wrap around it. However, a floating image will still anchor itself to an object in the document, usually the nearest paragraph. An anchor icon displays next to the paragraph and alignment guides appear as you drag.

Inline images are more reliable to work with since they will stay with their paragraph and only move where it moves. Images with text wrapped around them may look nice, but are much harder to position.

## Editing an image


The **Picture Tools Format** tab provides a range of image editing tools. As well as being able to correct and adjust colours, the **Picture Styles** group allows you to apply styles and effects.

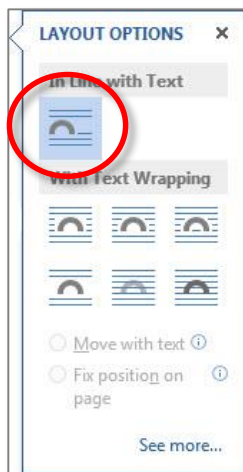


Use styles and effects with caution – it is easy to overdo things!

## Task 4.1 Inserting and repositioning an image



An image that allows text to wrap around it is 'floating'; one that does not allow wrapped text is 'inline'. An inline image is treated as a character in a paragraph, and can only be dragged into another paragraph. A floating image can be dragged anywhere on the page; however, it will also anchor itself to the nearest paragraph and move with that paragraph.


You can control wrapping by clicking on the **Layout Options** button  to display the most common settings. You can also use the **Wrap Text** option on the **Picture Tools Format** tab.



When you insert an image, by default it appears as **In Line with Text**. If you choose one of the other options, it becomes a floating image. To help you with positioning a floating image, Word displays an *object anchor*, and alignment guides appear as you drag it.

### Try this...

1. With **Report\_2.docx** open, navigate to page **3** and create a blank line after the heading **1.1.1 Spiders**.
2. With your cursor in the blank line, click on the **Insert** tab, and in the **Illustrations** group, select **Pictures**.
3. In the panel on the left, click on **Documents**, under **Libraries**.
4. In the **Documents** library, navigate to the folder **Word 2013 ► Beyond basics ► Practice files** and insert the file **spider.jpg**.
5. Move your cursor to the handle at the bottom right corner of the image, and when it becomes a diagonal double-headed arrow , hold down the mouse button and drag the image to make it smaller. (In the **Size** group, the **Shape Height** should be around **3.5** cm.)
6. With the image selected, click on the **Layout Options** button  and note that **In Line with Text** is selected.
7. Select **Square** from the **With Text Wrapping** options.

The image is now 'floating' and you should see the anchor icon .

8. Close the **Layout Options** callout.

9. Drag the image and watch the anchor icon.

*The text will wrap, and the anchor icon will move as the image moves. The image 'anchors' itself to the nearest paragraph.*

10. Drag the image so that the anchor icon sits in front of the blank line under the heading **1.1.1 Spiders**.

11. Click on the **Layout Options** button  and choose **In Line with Text**.

*The image should return to its original position and is again inline.*

12. Close the **Layout Options** call-out window.

13. Click on the **Home** tab, and in the **Paragraph** group, click on **Center**.

*Because the image is part of the paragraph, you can use the paragraph settings to position it.*

14. Click on **Align Left** in the **Paragraph** group move the image back to the margin again.



**Tip:** Most problems with images are to do with positioning – they do not stay where you want them to! Unless you have a very good reason to wrap text, **In Line with Text** makes it easier to control where an image is. If you do want a more complex layout – images side-by-side, for example – consider using a table and inserting images in the cells.

## 5. Creating captions

### Understanding captions

A caption is a useful way to identify and refer to an object in your document, such as a table or an image.

Rather than type in captions manually, always use Word's caption feature. This will update caption numbers automatically. It will also allow you to build a table of figures and insert cross-references.

A caption is made up of two parts:

- |               |   |
|---------------|---|
| <b>Label</b>  | This identifies the type of object. Word provides three default labels – <b>table</b> , <b>figure</b> and <b>equation</b> , but you can add labels of your own, such as <b>fig</b> , <b>chart</b> , <b>image</b> etc.   |
| <b>Number</b> | <p>The number is applied automatically, and is updated as you add or delete captions.</p> <p>You can change the number format, and add chapter numbers if you have applied numbers to your Heading styles.</p> <p>You can also add a short description of the object.</p> |



## Task 5.1 Inserting a caption

Captions should always be created using Word's **Insert Caption** function, not simply typed in manually.



The drop-down **Label** list gives you a choice of label types – this describes the type of object.

Caption positioning can be above or below the object.

You can also add new label types and change the numbering format.

### Try this...

1. On page **3**, click on the image of the spider.
2. Click on the **References** tab, and then in the **Captions** group, click on **Insert Caption**.
3. Click on the down arrow at **Label** and select **Figure** if it is not already selected.
4. In **Caption**, click after **Figure 1**, press the space bar and type **Tropical spider**.
5. In **Position**, check that **Below selected item** is selected.
6. Click **OK**.
7. Navigate to page **5** and click on the image of the frog.
8. On the **References** tab, click on **Insert Caption**.
9. In **Label**, check that **Figure** is selected, and in **Caption**, click after **Figure 2**, press the space bar and type **Tree frog**.
10. Click **OK**.
11. Navigate to page **7** and click on the table below the text **Table B**.
12. On the **References** tab, click on **Insert Caption**.
13. At **Label**, click on the down arrow and select **Table**.
14. In **Caption**, click after **Table 2**, press the spacebar and type **Projection figures from 2013 report**.

*Note that because there is a caption on the table above, the label number for this caption has been updated automatically.*

15. Click **OK**.



**Tip:** Caption text is formatted using the **Caption** style, which you can modify in the same way as any other style if you don't like the way it looks. If you click in the caption text, the style will appear in the **Styles** pane.

## 6. Creating charts and diagrams

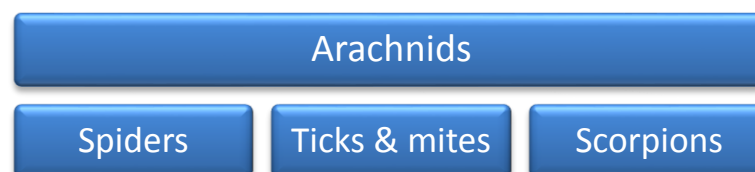
### Using SmartArt

Word includes a **SmartArt** option that allows you to communicate an idea in a combination of shapes and text. It can be more interesting to present information visually rather than as a simple text list. For example, instead of:

Arachnids

- Spiders
- Ticks & mites
- Scorpions

You could try:



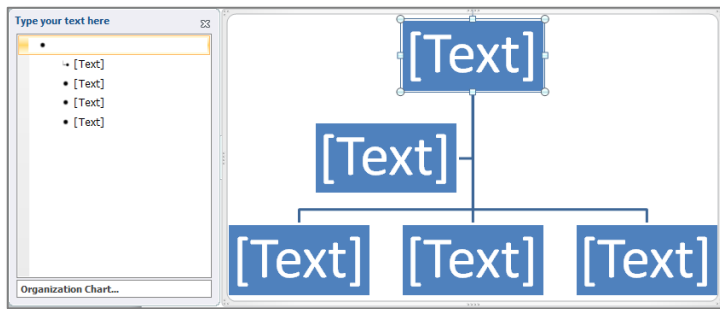
The SmartArt gallery has seven main categories:

<b>List</b>	List of items without a sequence.
<b>Process</b>	Items or steps with a specific sequence.
<b>Cycle</b>	Steps with a continuing sequence.
<b>Hierarchy</b>	Relationship between items or people.
<b>Relationship</b>	Non-hierarchical relationship between items or people.
<b>Matrix</b>	Grid-like diagrams.
<b>Pyramid</b>	Hierarchy of items.

The **SmartArt Tools** tabs allow you to change layouts, styles and colours as well as select fills and effects.


## Task 6.1 Creating an organisation chart

If you need to create an organisation chart, the **SmartArt Graphic** gallery allows you to produce a sophisticated chart quickly and easily.



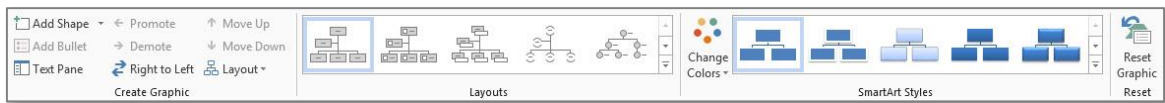
In a SmartArt Graphic, you can enter text in the **Text Pane** or by clicking in the shapes themselves.

### Try this...

1. Navigate to page **8** and click in the blank line after the heading **Organisation Chart**.
2. Click on the **Insert** tab, and in the **Illustrations** group click on **SmartArt**.
3. Click on **Hierarchy** in the panel on the left, then click on **Organization Chart** (first option in the top row) and on **OK**.
4. If the text pane does not display, click the control tab .
5. In the first entry in the **Text Pane**, type **Managing Director**.
6. Press the down arrow on the keyboard and type **Personal Assistant**.
7. Press the down arrow and type **Marketing Director**.
8. Repeat to add the **Finance Director** and the **IT Director**.
9. Close the text pane and click away from the SmartArt graphic to see the result.

## Task 6.2 Adding shapes to a chart

You can add peers, subordinates and assistants to an organisation chart, and also apply styles through the **SmartArt Tools Design** tab.



### Try this... Try this...

1. Click on the **Finance Director** shape in the SmartArt graphic to select it and on the **SmartArt Tools Design** tab if it is not already selected.
2. In the **Create Graphic** group, click on the down arrow at **Add Shape** (make sure you click on the down arrow) and select **Add Shape After** to add a shape on the same level.
3. Click in the shape and type **PR Director**.
4. Click on the **Finance Director** shape to select it again and click on the down arrow at **Add Shape**.
5. Select **Add Shape Below** to add a subordinate.
6. Click in the shape and type **Accountant**.
7. Click on the **Finance Director** shape again and on the down arrow at **Add Shape**.
8. Select **Add Shape Below** to add another subordinate.
9. Click in the shape and type **Project Officer**.
10. Click on the **Personal Assistant** shape and press **[Delete]** to remove it.
11. In the **SmartArt Styles** group, click on the **More** button to display the gallery.
12. Try out some of the styles, and then choose **Intense Effect** in the top row.

*The colours and styles you see in the SmartArt Styles group depend on the **theme** used in the document (**Design** tab and **Themes**). The default theme for a new document is **Office**.*

13. Click away from the chart to see how it looks.
14. Save your document.



**Tip:** You can add shapes directly from the **Text Pane** as well as using the **Add Shape** option. Press **[Return]** to add a shape at the same level. Press **[Tab]** or **[Shift Tab]** to promote or demote.

## 7. Structuring the document

Word includes features that allow you to change the structure of a document. For example, you can insert headers and footers, put text into columns, or include landscape pages.

### Using headers and footers

Headers and footers are the areas in the margins at the top and bottom of the page. They are normally used for displaying information such as the document title, file name or page number, but can include images or tables.

Word includes built-in preformatted headers and footers, but you can also create your own layout.

By default, the content in a header or footer appears on every page. To change the content from one part of the document to the next, you need to use *section breaks*.

### Understanding section breaks


When you are working with longer documents, you may need to apply different formatting and layouts to different parts of the document. For example, you might want to insert a landscape page to accommodate a large table or diagram, or change the content of the header or footer. This is done by using a section break to split your document into sections that you can format independently.

A section break contains information about the format and structure of the section, including:

- Headers and footers – text, fields, page numbering
- Page setup – margins, orientation
- Column settings – number and width

There are different types of section break:

<b>Next page</b>	The new section starts on the next page.
<b>Continuous</b>	The new section starts on the same page. Use this where you want different formatting on the same page, such as a mixture of columns and margin-to-margin text.
<b>Even or odd page</b>	The new section starts on the next odd (right) or even (left) page. You would normally only use this for double-sided printing.

If you are working in **Print Layout** view, it is a good idea to be able to see your section breaks, so that you do not delete them accidentally. The **Show/Hide**  button on the **Home** tab displays formatting marks. Section breaks appears as double dotted lines:

⋮:.....Section Break (Next Page).....⋮

You can customise the status bar at the bottom of the screen to display the number of the section you are working in so that you can keep track of where you are. You can also display the page number as shown on the page itself (formatted page number), as well as the physical page number.

## Task 7.1 Creating a header and footer

Although Word includes a range of built-in headers and footers, it is often easier to create your own using the **Edit Header** option.

The **Header & Footer Tools Design** tab includes tools for working with headers and footers.



### Try this...

1. Press **[Ctrl]** and **[Home]** to move to the start of the document.
2. Click on the **Insert** tab and in the **Header & Footer** group, click on **Header**.
3. Click on **Edit Header** from the menu at the bottom.
4. At the left margin of the header, type **Environmental Report**.
5. In the **Navigation** group, click on **Go to Footer**.
6. On the **Header & Footer Tools Design** tab, in the **Insert** group, click on **Document Info** and select **File Name**.
7. Press **[Tab]** twice to move to the right margin.
8. In the **Header & Footer** group, click on **Page Number**.
9. Move to **Current Position** on the menu and select **Plain Number**.
10. Click on **Close Header and Footer**.

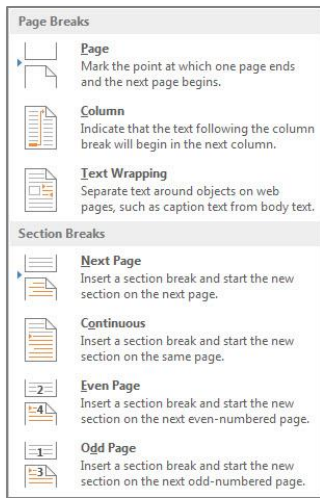


**Note:** Although the **Page Number** menu includes options for **Top of Page** or **Bottom of Page**, the alignment (left, centre and right) is applied to the entire header or footer, not just the number. This means that for right-aligned or centred page numbers, you will not be able to insert any other content on the same line.



## Task 7.2 Inserting a section break

Section breaks allow you to create different formats and layouts within your document. You will find them on the **Page Layout** tab, along with other page setup tools.




The options for section breaks are: **Next Page**, **Continuous**, **Even Page** and **Odd Page**.

When working with section breaks, it is a good idea to be able to see the formatting marks so that you don't delete them by mistake. Displaying section numbers on the status bar is also useful.


### Try this...

1. Check that you are at the beginning of the document.
2. Right-click on the status bar at the bottom of the screen to display the **Customize Status Bar** menu.
3. Select **Section** and **Formatted Page Number** by clicking to the left and then click away from the menu to close it.

You will see **Section: 1** at the left of the status bar. All documents contain one section by default, even if you have not inserted a section break. **Page: 1** is the page number as it will appear on the page (as opposed to the physical page number **Page: 1 of 10**).

4. With your document open, click on the **Home** tab and, in the **Paragraph** group, click on the **Show/Hide** ¶ button  to display the formatting marks, if it is not already selected.

You will now be able to see the document's formatting, including paragraph marks, and page and section breaks.

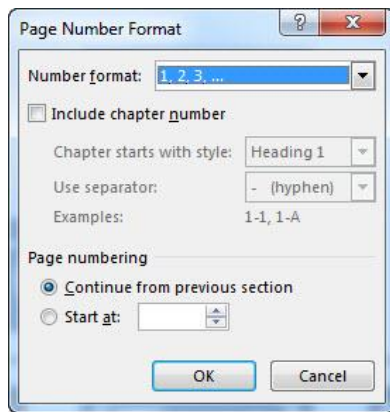
5. Scroll to page 2.
6. Move your cursor into the margin to the left of the page break until it becomes a white arrow .
7. Click to select the break and the paragraph mark, and then press **[Delete]**.
8. Make sure your cursor is at the beginning of the heading **AGE – Making a Commitment to the Environment**.

9. Click on the **Page Layout** tab, then in the **Page Setup** group, click on **Breaks**, and under **Section Breaks** select **Next Page**.

*Note on the status bar that you are now in **Section 2**.*

## Task 7.3 Formatting page numbers

You can use section breaks to change the formatting of page numbers in different parts of your document. For example, you could have an introductory section with no page numbers, or where the page number is displayed as roman numerals, and a main body with the number displayed as Arabic.



In the **Page Number Format** dialog box, you can change the number format, include a chapter number if you have used numbered headings, and force numbering to start at a specific number.

### Try this...

1. Make sure you are still in **Section 2**.
2. Click on the **Insert** tab.
3. In the **Header & Footer** group, click on **Footer** and select **Edit Footer** to open it for editing.

*You will format the page number so that the numbering starts at page 1 from this point.*

4. In the **Header & Footer** group, click on **Page Number** and select **Format Page Numbers**.
5. Click on **Start at**, check that the number is set at **1**, and click **OK**.

*The page number changes, and the **Page** entry at the far left of the **Status** bar now reads **Page: 1**.*

6. In the **Navigation** group, click on **Previous** to return to the footer for section 1.
7. Click on **Page Number** and select **Format Page Numbers**.
8. Click on the down arrow at **Number format**, select **i, ii, iii, ...** and click **OK**.

*The numbering in section 1 changes to Roman numerals.*

9. Double-click in the body of the document to close the footer.
10. Scroll through the document examining the page numbering.

## Task 7.4 Creating different headers and footers

When you create a new section it is linked to the previous section by default, and the header and footer content is carried forward. To change the text or the layout in a section's header or footer, you must *unlink* it from the section before.



To unlink a section, deselect the **Link to Previous** option on the **Header & Footer Tools Design** tab.

### Try this...

1. Navigate to page **3** (now formatted in the footer as page **1**) and click anywhere on the page.
2. Click on the **Insert** tab.
3. In the **Header & Footer** group, click on **Footer** and select **Edit Footer** to open it for editing.

You will see the label **Same as Previous** on the right, indicating that the footer in this section is linked to the footer in the previous section.

4. In the **Navigation** group, click on **Link to Previous** to deselect it.
5. Delete the filename field and type **Section 1**.
6. Click on **Close Header and Footer** (or double-click in the document body).
7. Navigate to page **7** (formatted as page **5**) and click in front of the text **Species projections**.
8. Click on the **Page Layout** tab, click on **Breaks** and select **Next Page**.

You should now be in **Section 3**. Note that the page number in the footer appears as **1**. The **Start at** setting that you used for the previous section has been carried forward into the new section.

9. Double-click in the footer to open it.
10. In the **Navigation** group, click on **Link to Previous** to deselect it.
11. Edit the footer text to read **Section 2**.
12. In the **Header & Footer** group, click on **Page Number** and select **Format Page Numbers**.
13. Select **Continue from previous section** and click **OK**.
14. Close the footer.
15. Delete the page break below **Table B**.

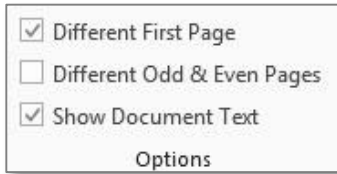
16. With your cursor in front of the text **Appendix**, click on the **Page Layout** tab and insert another **Next Page** section break.
17. Make sure you are in **Section 4** and double-click on the footer to open it.
18. In the **Navigation** group, click on **Link to Previous** to deselect it.
19. With your cursor at the left margin, edit the footer text to read **Appendix**.

*The **Continue from previous section** setting has been carried forward, therefore the page numbering carries on correctly.*

20. Close the footer and check your formatting.

## Task 7.5 Creating a different first page

If you have a document with a title page, it is unlikely that you will want it to have the same header and footer content as the main body. You can use the **Header & Footer Tools Design** tab to create a different first page.



The **Options** group allows you to create different headers and footers for the first page, and also create different layouts for odd and even pages if you wish.

### Try this...

1. Press **[Ctrl]** and **[Home]** to make sure you are at the start of the document.
2. Double-click in the header to open it.
3. On the **Header & Footer Tools Design** tab, in the **Options** group, click **Different First Page**.

*Note that the content of the header and footer on the first page has disappeared, and that the labels on the left now say **First Page Header – Section 1** and **First Page Footer – Section 1**.*

4. In the **Navigation** group, click **Next**.

*Note that the header and footer still contain the content you entered, and the labels say **Header – Section 1** and **Footer – Section 1**.*

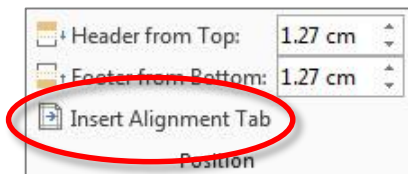
*You now have two different headers and footers in this section – a first page one and a normal one.*

5. In the **Close** group, click on **Close Header and Footer**.

## Task 7.6 Creating a landscape page

If you need to include a large table, picture or diagram, use section breaks to format part of your document as landscape so that the content fits more easily.

If you have used tabs and the **Current Position** option to place a page number at the centre or on the right in the footer, it will not appear in the correct place on a landscape page. This is because the location of the tabs is determined by the **Footer** style, and not by the page orientation.



You will have to reposition the number using the **Insert Alignment Tab** command on the **Header & Footer Tools Design** tab.

### Try this...

*First, you'll create a landscape section.*

1. Press **[Ctrl]** and **[End]** to move to the end of the document.
2. Click on the **Page Layout** tab and insert a **Next Page** section break.
3. In the **Page Setup** group, click on **Orientation** and select **Landscape**.

*Because Word applies **Page Setup** options to the current section only, the rest of the document remains as portrait.*

4. Examine the footer. Note that the page number appears in the wrong position.

*The **Footer** style (used by default to format footers) includes specific locations for the centre and right tabs, and these do not change even if you choose a different page orientation.*

5. Double-click in the footer to edit it.
6. In the **Navigation** group, click on **Link to Previous** to deselect it.
7. Click just in front of the page number.
8. In the **Position** group, click on **Insert Alignment Tab**, select **Right** and click **OK**.

*The page number moves out to the right margin.*

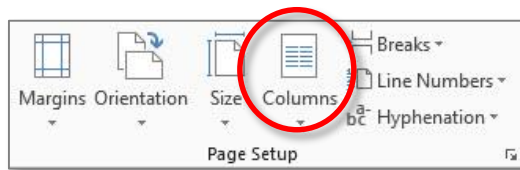
9. Double-click in the body of the document to close the footer.
10. With your cursor in the landscape page, click on the **Page Layout** tab and insert another **Next Page** section break.
11. In the **Page Setup** group, click on **Orientation** and select **Portrait**.
12. Click on the **Insert** tab, click **Footer** and choose **Edit Footer**.

13. In the **Navigation** group, click on **Link to Previous** to deselect it.
14. Click at the end of the text **Appendix** and press **[Delete]** to remove the extra tab.
15. Double-click in the document body to close the footer and check your layout and page numbering.



## Task 7.7 Creating columns

Some of the content in your document might look better presented in columns rather than full page width. The **Page Layout** tab includes an option to create columns.



You can choose from a range of column settings.

### Try this...

1. Scroll up to the heading **Further Information**.
2. Click in front of the text and insert a page break. (You can either click on the **Insert** tab and in the **Pages** group, click on **Page Break**, or hold down **[Ctrl]** and press **[Enter]**.)
3. Select the text from **New York** to the end of the **London** entry (make sure you don't include the section break).
4. Click on the **Page Layout** tab.
5. Click on **Columns** and select **Two**.

*Note that Word has automatically inserted **Continuous** section breaks before and after the selected text.*

6. Click in front of the text **Auckland**.
7. Click on **Breaks** and select **Column**.

*The text moves into the second column.*

## 8. Creating tables of contents and figures

If you have created a long or formal document, a table of contents makes it easier for your readers to navigate around it. You can also list items such as tables, diagrams or images in a table of figures.

Rather than typing in the contents page manually, use Word's **Table of Contents** and **Table of Figures** functions on the **References** tab to do the hard work for you.

### Styles and the table of contents

The most important thing to understand is that, to build a table of contents automatically, you need to format your headings with Word's styles.

By default, Word will only use text formatted with the built-in **Heading** styles to create the tables of contents. You can, however, customise your contents by adding other styles, including ones you have created yourself.

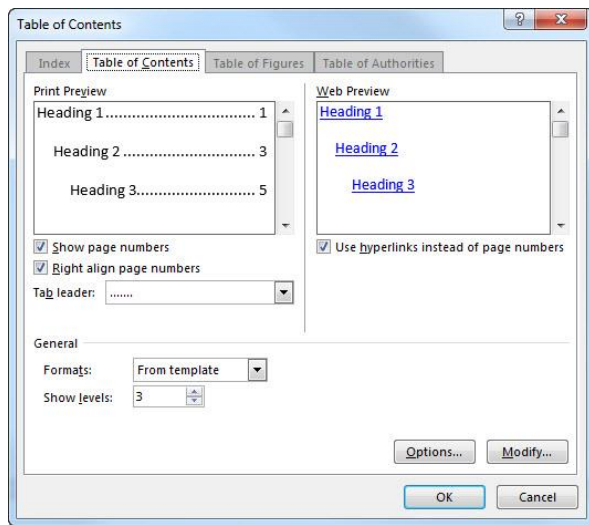
### Using the dialog box

Word includes a set of automatic built-in layouts to allow you to create your contents page quickly and easily.

However, for more control over the content and appearance, you can use the **Table of Contents** dialog box. You can choose the number of levels, select a different tab leader, and modify the table of contents (TOC) styles that Word uses to format the text.

## Task 8.1 Using the Table of Contents dialog box

The **Table of Contents** dialog box allows you to change the content and the appearance of your table of contents.



From here, you can choose the number of levels to display up to a maximum of nine.

You can also modify the table of contents styles to change how the table looks.

### Try this...

1. If you have not completed the previous exercises, open the file **Report\_3.docx** from the **Practice files** folder; otherwise continue with the file you are working on.
2. Press **[Ctrl]** and **[Home]** to move to the start of the document then scroll to page **2**.
3. If you can't see the formatting marks, click on the **Home** tab and on **Show/Hide ¶** in the **Paragraph** group.
4. Click immediately after the text **Report compiled by AGE on 01/12/13** (make sure your cursor is in front of the paragraph mark ¶).
5. Insert a page break.
6. Make sure you are in the blank line before the section break and type **Table of Contents** then press **[Enter]**.
7. Select the text **Table of Contents** and on the **Home** tab, apply the formatting: **Font – Arial; Font Size – 16** and **Bold**.

*Don't apply a built-in Heading style to the table of contents heading. If you do, it will appear as an entry in the table of contents! Format the text manually, or create a new style to apply.*

8. Click in the blank line below the contents heading.
9. Click on the **References** tab and then on **Table of Contents**.
10. Select **Custom Table of Contents** from the menu at the bottom to display the dialog box.

*By default, Word builds a table of contents using the text formatted as Heading 1, Heading 2 and Heading 3.*

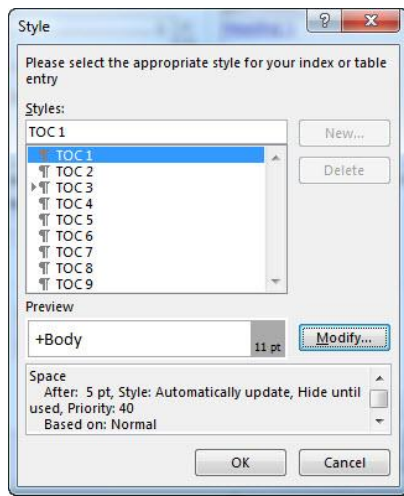
11. In the **General** section, click on the up spinner arrow at **Show levels** to change the value to **4**.
12. Click **OK**.



**Note:** The Table of Contents option includes two automatic formats. These will add the heading for you. Note that the style used for the heading is **TOC Heading**, which you can edit if you wish. To modify the table, click on **Table of Contents** and **Custom Table of Contents**.


## Task 8.2 Formatting a table of contents

If you don't like how the table of contents looks, you can change how it is formatted through the **Modify** option in the **Table of Contents** dialog box.



The styles **TOC 1** to **TOC 9** correspond to the nine levels you can have in a table of contents. They can be modified like any other style.

### Try this...

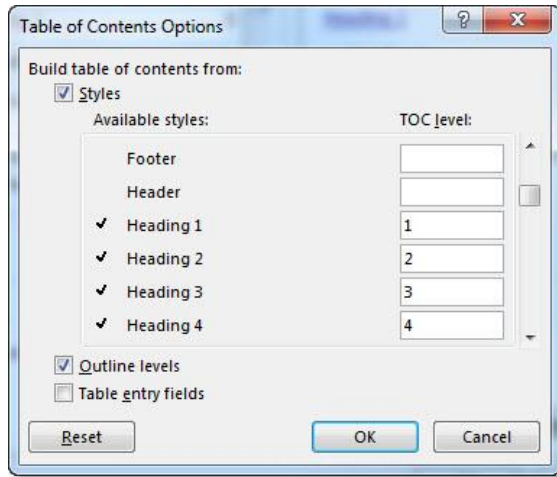
1. Click on the **Home** tab, then click on **Show/Hide**  to hide the formatting marks.
2. Click anywhere in the table of contents.
3. Click on the **References** tab, then click on **Table of Contents** and select **Custom Table of Contents** again.
4. Click on **Modify** to display the **Style** dialog.
5. Click on **TOC 1** and on **Modify** to display the **Modify Style** dialog box.
6. In the **Formatting** section, click on **Bold** and click **OK**. Do not close the **Style** dialog box.
7. Click on **TOC 2** and on **Modify**.
8. Click on **Format** and select **Paragraph**.
9. In **Spacing**, set **After** to **0 pt** then click **OK** and **OK** again.
10. Click on **TOC 3** and on **Modify**.
11. Click on **Format** and select **Paragraph**.
12. In **Spacing**, set **After** to **0 pt** then click **OK** and **OK** again.
13. Click on **TOC 4** and on **Modify**.
14. Click on **Format** and select **Paragraph**.
15. In **Spacing**, set **After** to **0 pt** then click **OK** and **OK** again.

16. Click **OK** to close the **Style** dialog box and **OK** again to close the **Table of Contents** dialog box.
17. Click **OK** at the prompt to replace the table of contents.

*The top level is now bold, and the spacing between the entries for levels 2, 3 and 4 has been reduced.*

## Task 8.3 Adding new styles to the table of contents

As well as setting the number of Heading levels in the Table of Contents dialog box, you can also control which styles are used to create your contents through the **Table of Contents Options** dialog box.



The styles used in your document appear in **Available styles**. In **TOC level**, enter the level the text formatted with the style is to appear at in the table of contents.

### Try this...

1. Click anywhere in the table of contents.
2. On the **References** tab, click on **Table of Contents**, and select **Custom Table of Contents**.
3. In the **Table of Contents** dialog box, click **Options** to display the **Table of Contents Options** dialog box.
4. In **Available styles**, scroll down to the **Heading 4** style, click in **TOC level** and delete the number.

You can use this dialog box as well as the **Table of Contents** dialog box to add and remove levels.

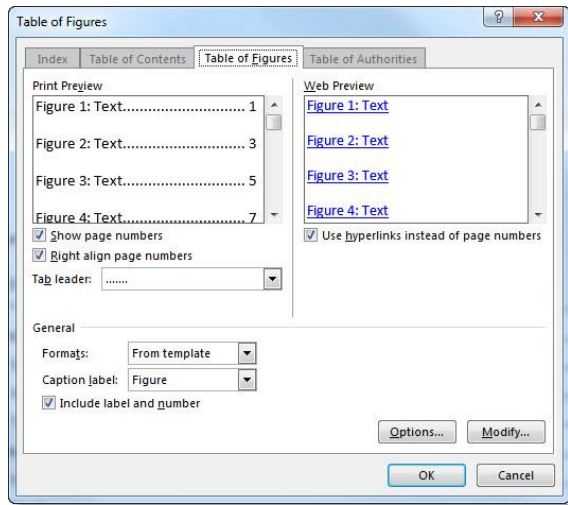
5. Scroll back up and locate the style **AppendixHeading**, and in **TOC level**, type **2**.

**AppendixHeading** was the new style you created to format a set of headings differently from the built-in Heading styles. Text formatted with this style will appear at the same level as text formatted as Heading 2.

6. Click **OK** and **OK** again.
7. Click **OK** at the prompt to replace the table of contents.
8. Note the additional entries at the end of the table of contents.

## Task 8.4 Creating a table of figures

If you have used Word's caption function to label your tables, images and diagrams, you can list the captions in a table of figures.



The process is similar to creating a table of contents. In **Caption label**, select the captions you want to display. You will have to create a table of figures for each label type you have used.

### Try this...

1. Click below the table of contents and insert a new blank line.
2. Type **Table of Figures** and press [Enter].
3. Format the text as **Arial, 16** and **Bold**.
4. Click in the blank line below the table of figures heading.
5. Click on the **References** tab, and in the **Captions** group click **Insert Table of Figures**.
6. In the **Table of Figures** dialog box, click on **Caption label** and choose **Figure** if it is not already selected.
7. Click **OK**.
8. Click **Insert Table of Figures** again.
9. At **Caption label**, select **Table** and click **OK**.

*You will see a separate table for each label type.*



## Task 8.5 Updating tables of contents and figures

It is important to remember that tables of contents and figures do not update dynamically. If you make changes to the content of your document, you must update the tables manually from the **Update Table of Contents** dialog box.



You can choose to update the page numbers only or the entire table. It is a good idea to always update the entire table.

### Try this...

1. In your table of contents, hold down **[Ctrl]** and click on the entry for ***Salamanders*** to navigate to the section.
2. Click at the end of the last paragraph in the section on salamanders and press **[Enter]**.
3. Click on the **Home** tab.
4. In the **Styles** gallery, click on **Heading 3**, then type **Physical characteristics** and press **[Enter]**.
5. Press **[Ctrl]** and **[Home]** then scroll down and click anywhere in the table of contents.
6. Click on the **References** tab and in the **Table of Contents** group, click on **Update Table** to display the **Update Table of Contents** dialog box.
7. Select **Update entire table** and click **OK**.

*The new heading appears in the table. Note that this only updates the table you are in, not the ones for the table of figures. To make sure all the tables are accurate, you should update everything.*

8. Click on the **Home** tab, and in the **Editing** group, click **Select**, then choose **Select All** to select the entire document. (The shortcut key is **[Ctrl]** and **[A]**.)
9. Press the shortcut key **[F9]**.

*If you have several tables for contents and figures, the dialog box will display for each.*

10. Select **Update entire table** and click **OK** at each prompt.

*The **[F9]** shortcut key doesn't just update tables of contents. If you have selected the whole document, it will also update all fields, such as cross-references and caption numbers.*

11. Save the completed document and relax!

## 9. Creating accessible documents

All documents and presentations you create should be accessible and inclusive, and good practice in this area can benefit all users regardless of ability.

The University has a legal and moral responsibility under the Equality Act 2010 to ensure that no-one is disadvantaged because of a disability, which includes providing any of its documents, leaflets, electronic resources etc. in an alternative format if requested by a disabled user. Examples of alternative formats include large print, printed on coloured paper, a paper copy of an electronic resource or vice versa, or an electronic resource in an alternative way, e.g. a Word document instead of a PDF.

Points to keep in mind are:

- Documents do not need to be produced in alternative formats until a request has been received.
- However, you will save time when producing alternate formats if you create documents with accessibility in mind.
- All documents must carry a tagline informing readers of how they can request another format.
- The University bears the cost of providing an alternative format, not the person requesting the information.

### Using Word to create accessible documents

#### Document tagline

All documents including minutes, agendas, leaflets, etc., should include a tagline offering to provide the information in an alternative format upon request, and giving two methods of contacting an individual who can do this. The tagline can be at the beginning or end of the document as long as it is clearly visible, and should use Arial, bold, size 14 font.

It should read:

**'If you require this document in an alternative format, such as large print or a coloured background, please contact [insert: name and contact details]'**

In Word, you can simply type this at the top or bottom of your document then apply direct formatting. Optionally, select the text then apply an 'Outside border' from the Paragraph section of the Home tab.

#### Font

Use Word's styles to format your text. This makes it easier for disabled users to adapt the document to meet their needs and to navigate the document using a screen reader.

Use a minimum font size of 12, ideally size 14, to assist readers with visual impairments – although no one font size will suit everyone.

Use sans-serif fonts, e.g. Arial, Verdana, or Calibri which is Office 2013's default font. The more ornate the font, the fewer the number of individuals who will be able to read it. Word Art is not compatible with some screen readers.

Avoid the use of italics and underlining wherever possible and use bold to emphasise items or create headings.

Don't use capitals for continuous text if possible, although a couple of words in capitals is acceptable.

Consider contrast and text colour. Using dark ink against a pale background is usually best for users with specific learning difficulties such as dyslexia. However, some users may find a pale font on a dark background easier. The key factor is that there is sufficient contrast between the font and background colours. Backgrounds should always be plain.

## Paragraph settings

Use left alignment to ensure the spaces between words are equal. Avoid justified text as it makes the spaces between words uneven, which is difficult for some people to read.

Leave the equivalent of at least one line space between paragraphs. The correct way to do this is using the paragraph spacing options rather than pressing the return key.

Double or 1.5 spacing between lines can make a document more accessible.

## Page numbering

Ensure all pages are numbered in the same place.

## Using images

Resize and crop images to focus the reader and keep files to a manageable size. When adding images to your document, make sure you add meaningful alt text and captions that will assist readers.

You can also use screen tips if you need extra information, but make sure your image is positioned in a way that doesn't interfere with the text.

## Using hyperlinks

You can use hyperlinks to send readers directly to information within the same document, to a different document or to a web page. Use **Insert > Hyperlink** to set these up, and include screen tips to provide further information about where the link takes the reader.

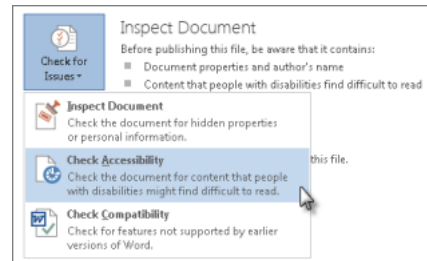
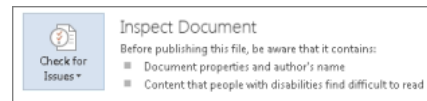
## Office Accessibility Checker

There is an Accessibility Checker in Word, Excel, and PowerPoint that flags possible accessibility issues in your files and provides instructions for fixing them. Each issue is classified as an error, warning, or tip depending on how difficult the content may be for people with disabilities to understand.

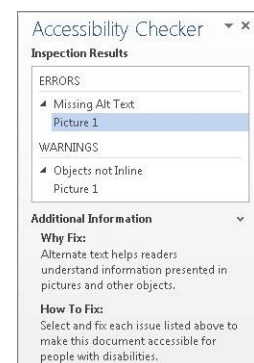
For more information, press F1 to open Office Help and search for 'Check for accessibility issues'.

To run the Accessibility Checker:

1. Click **File > Info**.
2. If the Accessibility Checker sees any potential issues, you will see a message next to the **Check for Issues** button.
3. To view and repair the issues in your file, click **Check for Issues > Check Accessibility**.



4. Your file reappears, and the **Accessibility Checker** task pane opens on the right of the screen, showing the inspection results.
5. Click a specific issue to see **Additional Information** and steps you can take to change the content.



## Rules used by the Accessibility Checker

Issue type	Rule name	Accessibility Checker checks that
Error	All objects have alternate text	All objects use alternate text. Alternate text doesn't contain an image or file extension.
Error	Tables specify column header information	Tables have a header row indicated, or are in Table Normal style.
Error	Long documents use styles to provide structure	Headings and/or a Table of Contents have been used in file to help organise the content.
Warning	Hyperlink text is meaningful	Link text has a Screen Tip and matches the link target.
Warning	Table has simple structure	There are no issues that cause tables to be non-rectangular, such a split cells, merged cells or nested tables.
Warning	Tables don't use blank cells for formatting	There are no entirely blank rows or columns in a table.
Warning	Avoid the use of repeated 'blank' characters	There are no runs of blank spaces, tabs and/or carriage returns.
Warning	Headings don't contain too much information	Headings aren't too long
Warning	The use of floating objects is avoided	Objects have text wrapping set to 'in line with text.'

Issue type	Rule name	Accessibility Checker checks that
Tip	Closed captions are included for inserted audio and video	All audio and video objects in the document have closed captioning.
Tip	Layout Tables are structured for easy navigation	The layout order should be logical for the language, and that the tab order is not circular.
Tip	No image watermarks are used	There are no watermarks used in the document.
Tip	All headings are in the correct order	All headings follow a logical order.

## Commonly requested alternative formats

Two commonly requested alternative formats are large print and coloured paper.

### Large print

Large print is normally size 18, but check with the individual what size they require.

Producing a large print document in Word is straightforward. If you've used styles, you can easily modify them and the changes will cascade throughout the document. If you haven't used styles, use **Ctrl + A** to select the whole document, then change the font size using the commands on the ribbon.

Check through your document to ensure it looks as expected. Page breaks and section breaks will remain active, so pages and sections will still start on a new page if set to do so. Update any tables of contents to reflect new page numbers, and check that images are correctly aligned – if you've used inline images then they should be.

Keep a Word master version of all documents you produce as it is easier to change the font size there rather than after you have converted it to another format such as a PDF.

### Printing on coloured paper

Users with dyslexia, other specific learning difficulties or visual impairments are most likely to find materials printed onto coloured paper helpful. Ask whether a bright or pastel shade is required before printing. It is a myth that yellow paper benefits all individuals with dyslexia.

## Creating accessible documents resources

University's web pages on creating accessible materials:

Search for 'creating accessible documents' using the University's search engine, or go to <http://www.ed.ac.uk/schools-departments/information-services/help-consultancy/accessibility/creating-materials/overview>

JISC guide on creating accessible documents, presentations and spreadsheets: <https://www.jisc.ac.uk/guides/using-assistive-and-accessible-technology-in-teaching-and-learning/documents-presentations-and-spreadsheets>