

Formatting Documents in Microsoft® Word

Prepared by:
Marie R. Herman, CAP-OM, ACS, MOSM
MRH Enterprises



LORMAN®

Published on www.lorman.com - January 2019

Formatting Documents in Microsoft® Word, ©2019 Lorman Education Services. All Rights Reserved.

MICROSOFT is a registered trademark of Microsoft Corporation and this white paper is not sponsored by or affiliated with Microsoft Corporation.

INTRODUCING

Lorman's New Approach to Continuing Education

ALL-ACCESS PASS

The All-Access Pass grants you **UNLIMITED** access to Lorman's ever-growing library of training resources:

- ☑ Unlimited Live Webinars - 120 live webinars added every month
- ☑ Unlimited OnDemand and MP3 Downloads - Over 1,500 courses available
- ☑ Videos - More than 1300 available
- ☑ Slide Decks - More than 2300 available
- ☑ White Papers
- ☑ Reports
- ☑ Articles
- ☑ ... and much more!

Join the thousands of other pass-holders that have already trusted us for their professional development by choosing the All-Access Pass.



Get Your All-Access Pass Today!

SAVE 20%

Learn more: www.lorman.com/pass/?s=special20

Use Discount Code Q7014393 and Priority Code 18536 to receive the 20% AAP discount.

*Discount cannot be combined with any other discounts.

Formatting Documents in Microsoft Word

Marie Herman CAP, OM, ACS, MOSM

Contents

Automatically Update	2
Create Styles	2
Cross References.....	2
Format Painter.....	3
Insert Chapter Name into Header/Footer	3
Keyboard Shortcuts.....	4
Modifying Styles.....	5
Navigation Pane	5
Quick Access Toolbar.....	5
Quick Styles	5
Table of Contents.....	8
Types of Styles.....	9
Character styles.....	9
Paragraph styles	10
Linked styles	10
List styles	12
Table styles	14

Automatically Update

When you are modifying styles, if you check the box for automatically update, any formatting changes you make manually to text that has a style applied to it will automatically cause that formatting to be applied to that style throughout the document.

Styles stay with the document, so when you transfer them from one computer to another, they should retain their formatting. However, if you have the **Automatically Update Document Styles** box checked, your styles may get overridden.

Create Styles

Styles are predetermined formats that can be customized the way you want them. In Word, for example, you could create a style that would make your text Size 16, Times New Roman, Red and Underlined. Then you would simply click on the appropriate style button on the home ribbon to select your particular style. Styles allow workgroups to use consistent formatting no matter who is working on the document. If you change your mind (I know, that never happens!), you change the formatting in one place (the style itself) and it is automatically applied throughout the document.

To use a style, you can click on the style name, then start typing, or type your text, select it (highlight it) and click the style name.

To access styles, click Styles on the Home Ribbon. You can create a brand new style by clicking Save Selection as New Quick Style. First you need to assign a name to your style. Make it something easy to remember and easy to distinguish from any other styles that you create. Then you need to decide if your style will be paragraph or character based. A paragraph style has formatting features that apply to the entire paragraph. By default the paragraph styles will be applied to the entire paragraph. A character style includes only formatting that applies to individual text.

Cross References

Cross references allow you to use location references (such as “See page x for more information”). Cross references can point to text that has heading styles applied to it and it can reference the text itself or the page the heading style appears on.

Go to the place you want to point FROM and click Insert – Cross Reference. Change the reference type to Heading and insert a reference to the Heading Text or Page Number. Note that you could also refer to many other things, like tables, pictures, etc.).

Cross references will update automatically when you print, print preview or save your document. To manually update, right mouse click on the cross reference field and choose Update Field, update entire table.

For (some) fields to update on print, you must select the "Update fields before printing" option at File tab | Options | Display.

Format Painter

The Format Painter is an extremely useful feature. This button, on your standard toolbar, looks like a paintbrush and allows you to copy formatting from one spot to another.

Place your cursor in the paragraph that contains the formatting you want. Press the Format Painter button once. Your mouse changes to an I-bar with a small paintbrush next to it. Select the text you want to change, and the formatting (color, size) is automatically copied to the selected text.

If you only want to copy character formatting (font color, size, typeface, etc.), then don't select the paragraph marker of the formatted text you want to use. If you want to copy paragraph formatting (line spacing, indenting, etc.), make sure that you have the paragraph marker selected before you click the Format Painter.

If you want to apply the formatting in several locations, double clicking on the Format Painter button will leave the feature on, even after you have clicked the first time to apply the formatting. You can then copy the text to multiple locations within the document. Clicking the button again (once) turns the feature off.

The Format Painter can fix numbering inconsistencies. If you have a numbered list, then several paragraphs without the numbering, and you want to continue the numbered list, the Format Painter can help. Just click on the line where the numbering is correct, then click the Format Painter, then select the line(s) you want numbered. Voila! Numbering fixed.

Insert Chapter Name into Header/Footer

Apply the appropriate heading style to the text you will want to appear in header or footer. Note that if you are using the same heading style but don't want to include all the text, make a custom style based on that heading and apply that instead.

Go to Insert-Header-Edit Header. Click on Insert – Quick Parts – Field – Styleref. Choose the correct heading style from the list. Voila! You will now have the chapter title text included automatically in your header.

The StyleRef field inserts text that's formatted with the specified style. When inserted in a header or footer, the StyleRef field prints the first or last text formatted with the specified style in the document body of the current page, allowing you to print dictionary-style headers or footers.

- Clicking the box to Search from the bottom to the top puts in the text from the last reference with that style instead of the first.
- Clicking the box to Insert paragraph number will insert the number of the numbered heading style.

- Clicking the box to Insert paragraph number in a relative context will insert Above or Below as appropriate.
- Clicking the box to Suppress all non-delimiter characters will insert the paragraph number of the numbered heading style without any text, so Section 1.01 becomes 1.01.
- Clicking the box to Insert the number in full context will insert the paragraph number with a full path (i.e. if you have level 1 be 1, level 2 be a, level 3 by I, full context would be 1.a.I).

When you insert the field in:

- Document text: Word searches backward from the StyleRef field for the specified style. If the style isn't found, Word searches forward from the StyleRef field.
- Footnotes, annotations, and endnotes: Word searches backward from the footnote, annotation, or endnote reference mark for the specified style. If the style isn't found, Word searches forward from the reference mark.
- Headers and footers (results for printed document): Word searches the current page, from top to bottom, for the specified style. If the style isn't found, Word searches next from the top of the page to the beginning of the document, and then from the bottom of the page to the end of the document. If the \l switch is used, Word searches from the bottom of the page to the beginning and then to the end of the document.
- Headers and footers (results for electronic document): Word searches the section that contains the StyleRef field, from the beginning, for the specified style. If the style isn't found, Word searches from the end of the section to the end of the document.

Keyboard Shortcuts

Some common keyboard shortcuts you might find useful.

Ctrl-b – Bold (toggles on and off)

Ctrl-I – Italic

Ctrl-U – Underline

Ctrl-[- decrease font 1 point

Ctrl-] – Increase font 1 point

Ctrl-Spacebar – Removes character formatting

Ctrl-Shift-N – Applies normal formatting

Ctrl-Q – Clears manually applied paragraph formatting

Ctrl-Shift-C – Copies text formatting

Ctrl-Shift-V – Pastes text formatting

Modifying Styles

To modify an existing style, right mouse click on the appropriate style button and click Modify. From the Modify Style window, you can change the formatting of the font, paragraph, tab, borders, frame, and language settings. The windows that appear with each of these options will match the windows that would appear if you chose them from the font or paragraph ribbon groups, but your modifications will be applied to the style itself, not just the highlighted text.

If you check the box for automatically update, any formatting changes you make manually to text that has a style applied to it will automatically cause that formatting to be applied to that style throughout the document.

Checking the box to Add to Template will add this style to the template that was used to create the document. By default, styles are only associated with the document that they were created in. Therefore, if you modify the formatting of Heading 1 for instance, it would only affect the open document and not every other new document that is subsequently created.

Navigation Pane

The Navigation Pane is a pane that opens on the left side of your screen and only shows text that has heading styles applied. It will allow you to click on any of those section headings to move easily through the document. This is especially useful if you are working with a large document.

Note that you can click and drag the heading references and it will drag the entire section to the new location.

Quick Access Toolbar

To add buttons to your quick access toolbar, right mouse click on the toolbar, then choose Customize Quick Access Toolbar. Change Choose Commands list to All Commands. Select the one you want, click add. Can select for current document or all documents. To rename or change icon, select it in list and click Modify. Display Name is the screen tip that pops up when you hover your mouse.

Quick Styles

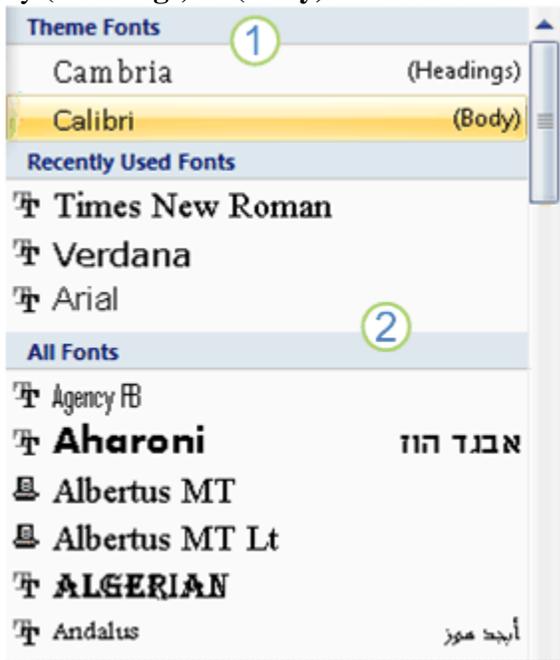
After you apply styles, you can quickly change the look of the document to suit your needs by choosing the Quick Style set that you like. You can refine the look of the document even more by selecting a theme that you like. Within the Quick Style and theme parameters, you can also fine tune adjustments to the color and font schemes.

Themes provide font and color schemes for Quick Style sets. When you apply a theme, you simultaneously apply a font scheme, a color scheme, and a set of graphic effects. The font scheme and color scheme from the theme are carried over into the Quick Style sets.

Applying custom font choices

Applying a theme or a font scheme defines font choices for headings and body text that are designed to go together. The font choices stay in effect regardless of which Quick Style set you choose, until you switch to a different theme or font scheme.

NOTE If you don't want the font to update to reflect updates to the theme or font scheme, be sure to format the text with a font whose name is not followed by **(Headings)** or **(Body)**. These are listed as **Theme Fonts** in the gallery of fonts.



1. The fonts that you select among the **Theme Fonts** will be updated to a different font scheme if you apply a different theme or font scheme to the document.
2. Click a font among the **Recently Used Fonts** or **All Fonts** to quickly apply a font that is not subject to changing the theme or font scheme.

Applying custom color choices

You can apply a color scheme that is designed as a coordinated set of colors. When you define the color of text, you can choose one of the theme colors, or you can select from a range of standard and custom colors.

If you choose a theme color, the color might change if you switch to a different color scheme or theme. However, if you choose a standard or custom color, text is displayed in that color regardless of the color scheme or theme that you apply to the document.

1. Colors that you select from the **Theme Colors** are updated to a different color scheme if you apply a different theme or color scheme to the document.
2. Colors that you select from the **Standard Colors** are not changed even if you apply a different theme or color scheme to the document.



3. Click **More Colors** to select from a wide array of color choices. These colors also are not changed even if you apply a different theme or color scheme to the document. Palettes of choices for applying layers of formatting

Let's put all these formatting choices together. Think of themes as palettes that provide font and color schemes, and Quick Style sets are like collections of brushes that you use to apply formatting to your document. The palettes are labeled things like Office, Apex, and Aspect. The brush collections are named things like Word 2007, Manuscript, and Traditional. Each brush collection is prestocked with brushes named Normal, Heading 1, Emphasis, and so on.

When you apply brush strokes (styles) to your document, Word applies the formatting in layers. Each layer overrides the previous layer, providing an increasing degree of fine-tuning and a decreasing degree of flexibility.

The bottom layer is the Normal paragraph style. Text formatted as Normal can automatically change its appearance when you switch themes or Quick Style sets. The top layer is direct formatting. If you select a word and apply the standard red color to it, the word remains red no matter what theme, Quick Style set, or style you apply to it.

Emphasize or italicize?

For example, if you are using the Word 2007 Quick Style set, and you want to emphasize a word in a paragraph, you can select it and then do one of two things:

- Format it with the **Emphasis** Quick Style.
- Italicize it (for example, by pressing CTRL+I).

The choice you make depends on whether you want to emphasize the text or italicize it. Emphasized text contrasts with the surrounding text, but it doesn't necessarily need to be italicized. On the other hand, you may want to use italics if the text is a book title.

When you use the Word 2007 Quick Style set, the Emphasis style italicizes the text. However, if you switch to the Fancy Quick Style set, the body text is displayed in italics, and text formatted with the Emphasis style is displayed in a contrasting color with a shaded background. If you switch to the Elegant Quick Style set, text formatted with the Emphasis style is displayed as bold, small caps.

The Emphasis style is a design element within the Quick Style set, not an explicit format.

Customized styles

If you want formatting choices that are not available from the built-in styles, Quick Style sets, and themes, you can create custom styles to suit your needs.

The easiest way to create a custom style is to modify a built-in style and then save it as a new style.

For example, you might want to format a paragraph of quoted material with a half-inch indent from the left and right margins, single spaced. There is no built-in style to accommodate this, but you can create a custom style by doing the following:

1. Click in the paragraph you want to format.
2. On the **Home** tab, click the **Paragraph** Dialog Box Launcher.



3. In the **Indentation** section, type **0.5"** in the **Left** and **Right** boxes.
4. In the **Spacing** section, in the **Line spacing** list, click **Single**.
5. Click **OK**.
6. Right-click in the paragraph, point to **Styles**, and then click **Save Selection as a New Quick Style**.
7. In the **Name** box, type a name for the style, such as **Block quote**.
8. If you want the style to be included in the gallery of styles on the **Home** tab, and if you want the style to be a linked style, click **OK**.
9. If you don't want the style to be included in the gallery, or if you want the style to be either a paragraph or a character style, click **Modify** and do one or both of the following:
 - At the bottom of the dialog box, clear the **Add to Quick Style** list box.
 - In the **Style type** list, click **Paragraph** or **Character**.

Table of Contents

A Table of Contents is the listing at the beginning of a document that details all the sections with their appropriate page numbers. Word can generate a table of contents automatically when you have Heading Styles or custom styles that are based on Headings applied to the text. All you have to do is click where you want to insert the table of contents, then click on References – Table of Contents – Insert Table of Contents (or select one of the preformatted options). You will see a preview to show you what your table of contents will look like. Usually they only go down to three levels, but you can modify that to include more levels. You can choose to show page numbers or not. On the bottom half of the window you'll see an option for formats. These are pre-designed table of content styles. Traditionally each level is indented, but that can be modified. To change the formatting, click on the Modify button in the bottom right corner.

Select the style on the left (TOC1 is the first level of the table of contents, which usually is matched with the Heading 1 Style), then click Modify.

The window that comes up when you click on Modify gives you the option to change the name of your style. Then you can click the Format button, which will allow you to modify font, paragraph, tab, borders, frame, and numbering settings. The windows that appear with each of these options will match the windows that would appear if you chose them from the Format menu.

From this window you can also check the box to automatically update future changes. When this option is checked, you can manually change the table of contents formatting and the style will be updated throughout the table of contents.

You can update the table of contents at any time by right mouse clicking on top of it and choosing Update Field. Then you will choose to update the page numbers only or the entire table (which would update any text changes that you made). Click OK. Voila!

I normally update my entire document at one time, by pressing Ctrl-A (shortcut to select all text in document), then right mouse clicking and choosing Update Field. This will update your table of contents and all cross references or fields throughout the document.

Types of Styles

Paragraph styles are marked with a paragraph symbol: ¶. You can see the paragraph symbol in the Quick Style gallery as well as in the Styles task pane. Click anywhere in a paragraph to apply the style to the entire paragraph.

Character styles are marked with a character symbol: a. Click anywhere in a word to apply the style to the entire word. Or you can select more than one word to apply the style to more than one word. Character Styles can only hold character formatting, primarily font characteristics, such as italic formatting and font color.

Linked styles are marked with both a paragraph symbol and a character symbol: ¶a. Click anywhere in a paragraph to apply the style to the entire paragraph. Or you can select one or more words to apply the style to the words that you selected.

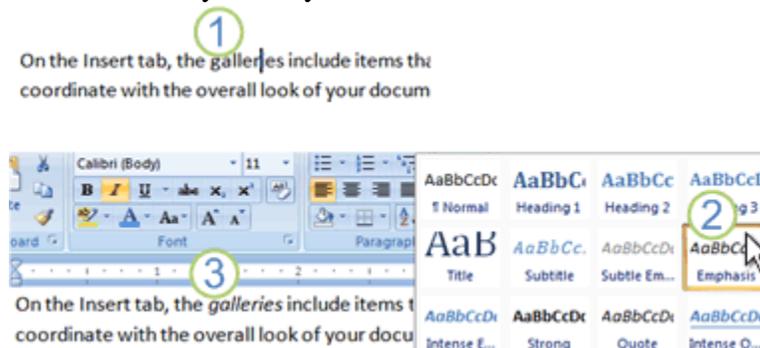
Character styles

Character styles contain formatting characteristics that can be applied to text, such as font name, size, color, bold, italic, underline, borders, and shading.

Character styles do not include formatting that affects paragraph characteristics, such as line spacing, text alignment, indentation, and tab stops.

Word includes several built-in character styles, such as Emphasis, Subtle Emphasis, and Intense Emphasis. Each of these built-in styles combines formatting, such as bold, italic, and accent color, to provide a coordinated set of typographic designs. For example, applying the Emphasis character style formats text as bold, italic, in an accent color.

To apply a character style, you select the text that you want to format, and then you click the character style that you want.



1. Click in the word you want to format.
2. Mouse over the Quick Styles to see a preview of the formatting in your document. When you point to a character style, only the word where you clicked is formatted. When you point to a paragraph style or a linked style, the entire paragraph is formatted. Click the character style that you want to use.
3. The word that you selected is formatted with the characteristics of the style that you chose.

Paragraph styles

A paragraph style includes everything that a character style contains, but it also controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders.

For example, you can have a character style called Alert that formats text as bold and red. Additionally, you can have a paragraph style called Headline that formats text as bold and red. But the Headline paragraph style also centers the text horizontally and adds 24 points of space above the text.

In this scenario, if you select a paragraph and then apply the Alert style, all the text in the paragraph is formatted as bold and red, but nothing else about the paragraph changes. However, if you select the paragraph and then apply the Headline style, the text become bold and red, extra space is inserted before the paragraph, and the paragraph is centered between the left and right margins.

Word includes two built-in paragraph styles: Normal and List Paragraph. By default, Word automatically applies the Normal paragraph style to all text in a blank, new document. Similarly, Word automatically applies the List Paragraph paragraph style to items in a list — for example, when you use the **Bullets** command to create a bulleted list.

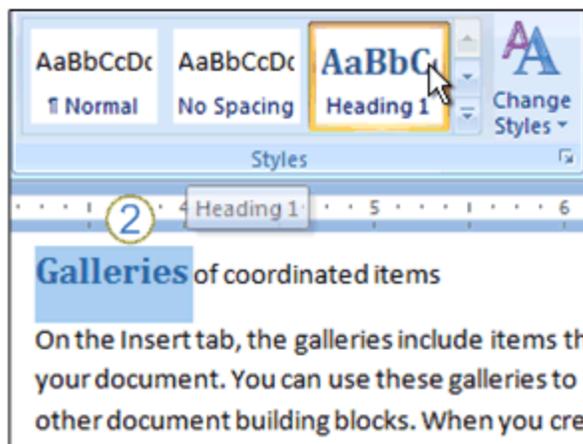
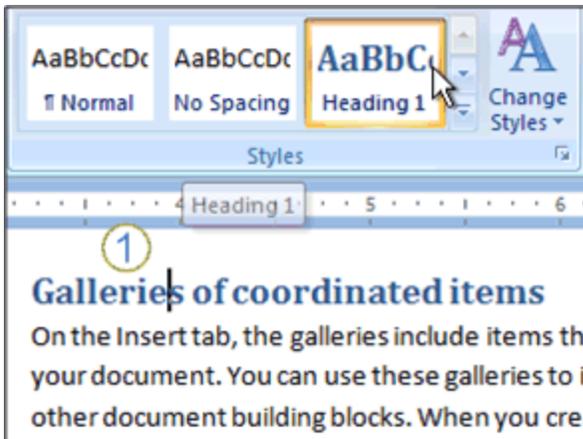
To apply a paragraph style, you select the paragraphs that you want to format, and then you click the paragraph style you want.

NOTE To select a single paragraph for applying a paragraph style, you can click anywhere in the paragraph. To select more than one paragraph, click anywhere in the first paragraph and drag to anywhere in the last paragraph that you want to select. You do not need to select the entire paragraph.

Linked styles

A linked style behaves as either a character style or a paragraph style, depending on what you select. If you click in a paragraph or select a paragraph and then apply a linked style, the style is applied as a paragraph style. However, if you select a word or phrase in the paragraph and then apply a linked style, the style is applied as a character style, with no effect on the paragraph as a whole.

For example, if you select (or click in) a paragraph and then apply the Heading 1 style, the whole paragraph is formatted with the Heading 1 text and paragraph characteristics. However, if you select a word or a phrase and then apply Heading 1, the text that you selected is formatted with the text characteristics of the Heading 1 style, but none of the paragraph characteristics are applied.



1. When you select or click in a paragraph and apply a linked style, the style is applied to the whole paragraph.
2. When you select a word or phrase and apply a linked style, the style is applied only to the selected text.

How is this useful? Consider the scenario above, in which an Alert character style and a Headline paragraph style each format text as bold and red. If the Headline style were a linked style instead of a paragraph style, you would not need a separate character style for formatting words and phrases. Wherever you wanted a headline in your document (bold, red, centered, with extra space above), you would select a paragraph and apply the linked style. Wherever you wanted an alert, you would select a word or phrase and apply the same linked style.

Word includes many built-in linked styles, notably the heading styles (Heading 1, Heading 2, and so on).

TIP You might want the first few words of a paragraph to coordinate with the formatting of the headings in your document. This type of formatting, known as a run-in head or a side head, is easy to apply by using linked styles. Select the first few words of a paragraph, and then apply a heading style.



- 1 **Thematic look** Most controls offer a choice of using format that you specify directly.
- 2 **Theme elements and Quick Style galleries**
To change the overall look of your document, choose new theme elements. To change the looks available in the Quick Style gallery, use the Quick Style gallery. Both the Themes gallery and the Quick Styles gallery provide

1. Select the first few words of a paragraph and then click a heading style to create a run-in head.
2. Click in a paragraph and then click a heading style to create a heading.

List styles

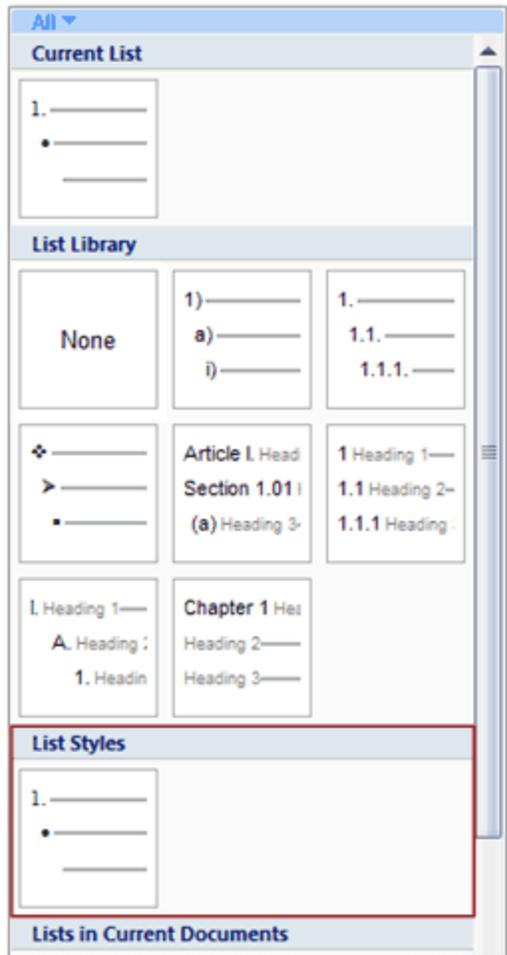
A list style applies characteristics for formatting a list. A list can include levels of hierarchy, like an outline, that can be indicated by indentation and numbering schemes. For example, level one in a multilevel list can be aligned against the margin and can begin with an Arabic numeral followed by a period. Level two can be indented slightly from the margin and can begin with a lowercase alphabetical character followed by a closing parenthesis. Here is an example of a multilevel list that is two levels deep:

1. This is the first item at level one.
 - a) This is the first item at level two, within the first item at level one.
 - b) This is the second item at level two, within the first item at level one.
2. This is the second item at level one.
 - a) This is the first item at level two, within the second item at level one.
3. This is the third item at level one.
 - a) This is the first item at level two, within the third item at level one.
 - b) This is the second item at level two, within the third item at level one.
 - c) This is the third item at level two, within the third item at level one.

A list style can define formatting for as many as nine levels of a list. The formatting scheme can include paragraph indentation for each level of the list, any label text (such as, "Item" or "Chapter"), and the numbering or bullet characters to use in the list.

Unlike the other types of styles (paragraph, character, linked, and table), predefined list styles are not available when you first create a document in Word.

NOTE A document may contain list styles if you receive it from someone who created his or her own list styles. If your document contains list styles, they are listed under the **List Styles** heading in the gallery of multilevel lists. To see that gallery, click **Multilevel List** in the **Paragraph** group on the **Home** tab.



List Library: the starting point for list styles

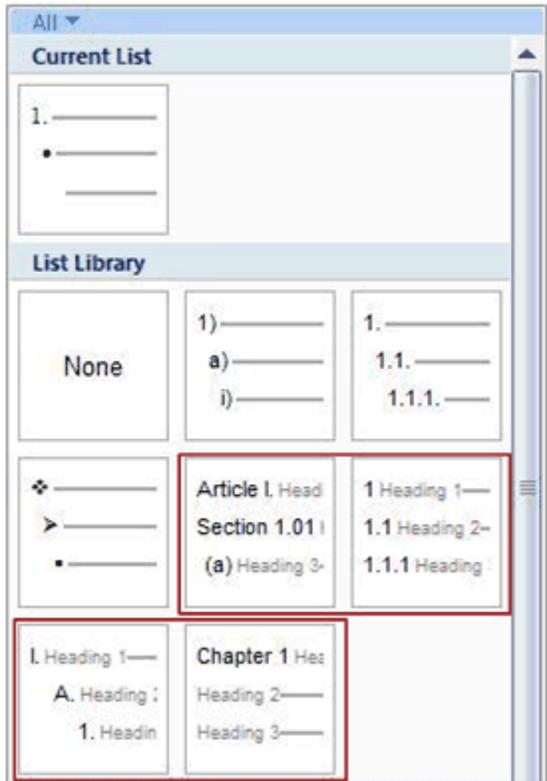
Instead of predefined list styles, Word provides several multilevel list templates, which are displayed under the **List Library** heading in the gallery of multilevel lists. These preformatted designs can be applied to lists in your document, and they can also serve as a handy starting point for creating your own list styles.

Consider creating your own list style when you want to do the following:

- **Change list formatting consistently throughout your document** After list styles are defined and applied, they can be changed. The changes affect all instances where the list style is used in the document.
- **Use complex list formatting that varies from one multilevel list design to another** List styles provide great flexibility, and each one is named separately, which makes it easier to distinguish among them in the list of list styles.
- **Apply formatting to a multilevel list by using a keyboard shortcut** You can assign keyboard shortcuts to list styles that you create, but not to the preformatted multilevel list templates.

TIP If you use the built-in heading styles in your document (Heading 1, Heading 2, and so on), you can use multilevel list templates to apply a numbering scheme to your

headings. For example, to number headings so that top-level headings (Heading 1 paragraphs) are numbered 1, 2, 3, second-level headings (Heading 2 paragraphs) are numbered 1.1, 1.2, 1.3, and so on, you click in the first Heading 1 paragraph, and then under **List Library** you click **1 Heading 1, 1.1 Heading 2, 1.1.1 Heading 3**. Multilevel list templates that number headings are marked in the list gallery with **Heading** in gray text.



Create your own list style

The easiest way to create a list style is to start with one of the preformatted multilevel list templates.

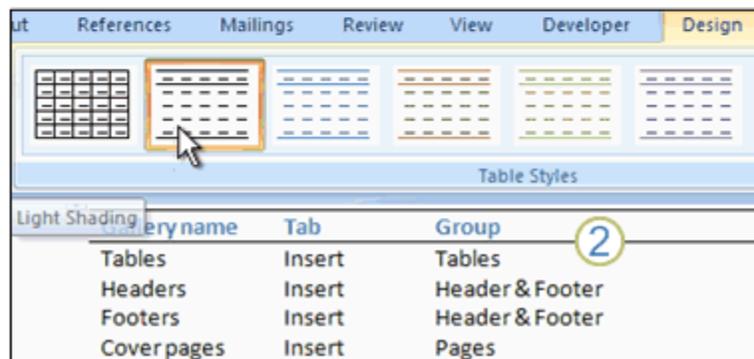
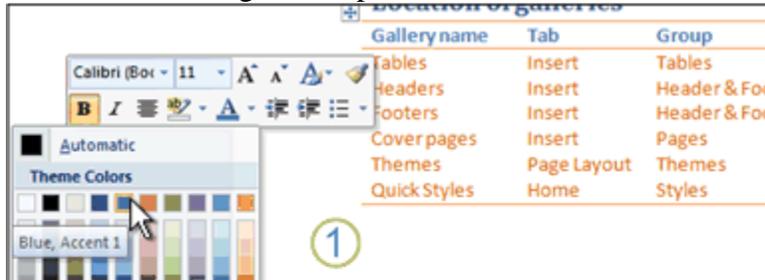
1. Select the list that you want to format.
2. On the **Home** tab, in the **Paragraph** group, click the arrow next to **Multilevel List**.
3. Under **List Library**, click the design that most closely matches how you want your list style to look.
4. Click **Multilevel List** again, and then click **Define New List Style**.
5. Make any modifications you want to the preformatted design.
6. In the **Name** box, type a name for your list style.
7. If you want your list style to be available for all new documents that you create, click **New documents based on this template**.

Table styles

A table style provides a consistent look to borders, shading, alignment and fonts in tables. To apply a table style, you select the table that you want to format, and then you click a table style from the gallery of table styles on the **Design** tab, on the **Table Tools** contextual tab. Within a table cell, you can use styles and direct formatting to

format the content of the cell. Formatting that you apply this way overrides the formatting that comes from the table style.

In other words, if you use a style or direct formatting to format the content of a table cell and then you switch to a different table style, the content that you formatted with the style or direct formatting is not updated to match the new table style.



1. You can apply formatting to the content of a table, such as changing the header row to blue.

2. When you switch to a different table style, the header row remains blue.

TIP You can change the selection of table styles in the gallery by selecting or clearing check boxes in the **Table Style Options** section on the **Design** tab, before you open the gallery of table styles. For example, if your table has no header row, and you don't want rows to alternate shading, clear the **Header Row** and **Banded Rows** check boxes. When you open the gallery of table styles, you see previews that do not include formatting for header rows or banded rows.

The material appearing in this website is for informational purposes only and is not legal advice. Transmission of this information is not intended to create, and receipt does not constitute, an attorney-client relationship. The information provided herein is intended only as general information which may or may not reflect the most current developments. Although these materials may be prepared by professionals, they should not be used as a substitute for professional services. If legal or other professional advice is required, the services of a professional should be sought.

The opinions or viewpoints expressed herein do not necessarily reflect those of Lorman Education Services. All materials and content were prepared by persons and/or entities other than Lorman Education Services, and said other persons and/or entities are solely responsible for their content.

Any links to other websites are not intended to be referrals or endorsements of these sites. The links provided are maintained by the respective organizations, and they are solely responsible for the content of their own sites.