

WORD 2013

Organizing Long Documents

Word offers several great tools for organizing long documents. A table of contents and an index help readers locate specific topics in documents. Headers and footers are useful for displaying information, such as page numbers and chapter names, while styles and the Navigation pane let you navigate and reorganize your documents using the heading styles. In this lesson, you will work with these tools to organize long documents.

CASE STUDY: REFINING A POLICIES AND PROCEDURES MANUAL

Raritan Clinic East is a pediatric medical practice. The practice serves patients ranging in ages from newborn to 18 years. You recently accepted a position in the human resources department at Raritan Clinic. You have been tasked with reviewing the current policies and procedures manual, and you have identified numerous “finishing” features that need to be added to the manual to make it easier to use. By adding a table of contents, index, and headers and footers, you believe the document will be more user-friendly.

LEARNING OBJECTIVES

After studying this lesson, you will be able to:

- Create a table of contents
- Add headers and footers
- Create an index
- Apply Styles
- Navigate and reorganize a document

LESSON TIMING

- Concepts/Develop Your Skills: 2 hr 30 min
- Concepts Review: 15 min
- Total: 2 hr 45 min

Creating a Table of Contents

Word's Table of Contents feature automatically builds a table of contents by gathering up the headings that are formatted with heading styles. Word organizes the headings in the order in which they appear in the document. In addition, it applies TOC styles that correspond to the heading levels. The styles then format the table entries. For example, Heading 2 entries are subordinate to Heading 1 entries. You can automatically update a table of contents created with Word's heading styles.

Table of Contents Links

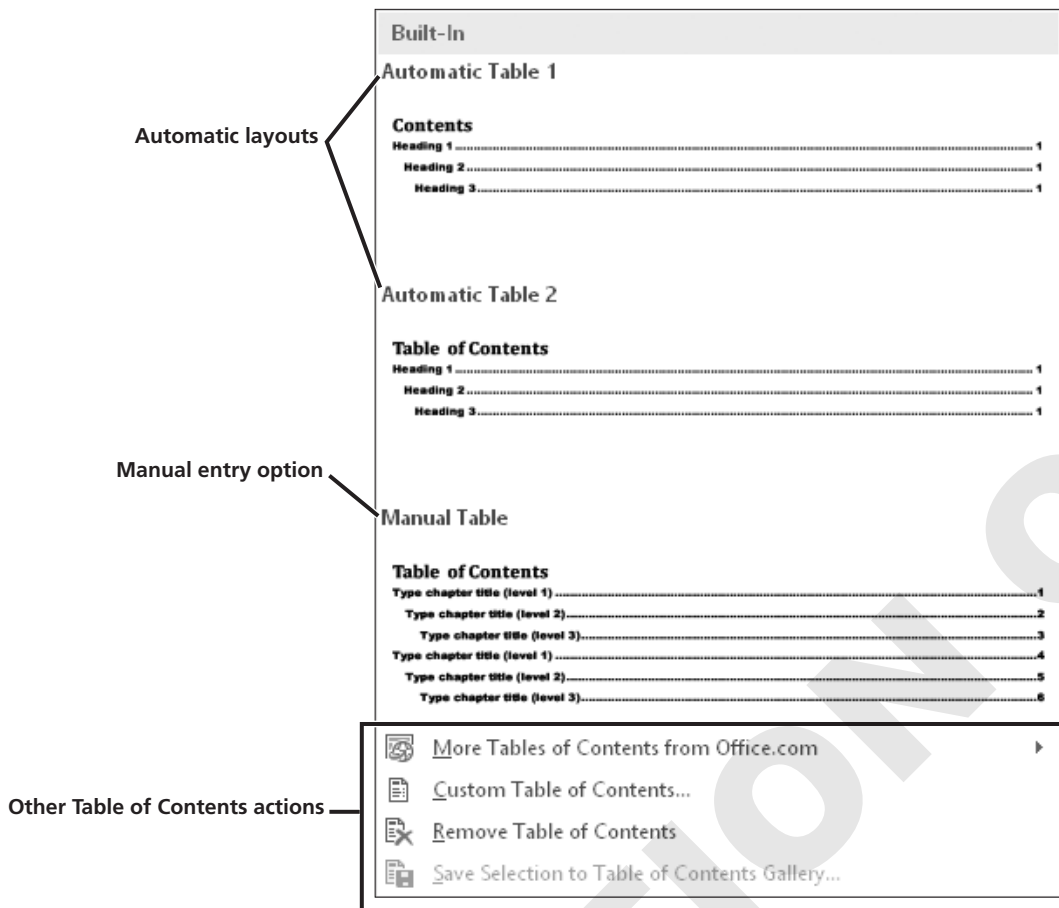
A table of contents is inserted as a large field composed of the various table entries. Each entry within the table functions as a hyperlink. You can navigate to a page within the document by pressing **Ctrl** while clicking a table entry.

Table of Contents	
MISSION STATEMENT	
SCOPE OF SERVICES	
PATIENT MANAGEMENT PROC	file:///c:/lesson 10\wd10-d09-raritanp&p-sstudent.docx Ctrl+Click to follow link
ENTRY INTO SERVICES	
PATIENT APPOINTMENTS AND BILLING	
PATIENT RECORDS	

Using a Predesigned Table of Contents

You can apply a predesigned table of contents format from the Table of Contents gallery. Toward the bottom of the gallery is a manual table of contents design option that you can fill out independently of the document content.

Table of Contents gallery





Creating a Page for the Table of Contents





In most documents, the table of contents appears at the beginning of the document—and just after the title page in documents containing a title page. Because the table of contents is often created after the document is complete, you may need to create a new page to hold the table.

When headers and footers or other page-level formatting such as page numbering appear in a document, it is better to create a page to hold the table of contents using a section break. This allows flexibility, such as numbering the table of contents page(s) with Roman numerals (i, ii, iii) and the rest of the document with Arabic numerals (1, 2, 3).

DEVELOP YOUR SKILLS WD04-D01

Insert a Table of Contents

1. Open **WD04-D01-RaritanP&P** from your **WD2013 Lesson 04** folder and save it as **WD04-D01-RaritanP&P- [FirstInitialLastName]**.
2. Choose **Home**→**Styles**→**dialog box launcher**  to open the Styles task pane.
3. Scroll to **page 2** and position the insertion point in the heading *Mission Statement*.
4. Position the insertion point in several additional headings on page 2.
5. **Close**  the Styles task pane.

6. Position the insertion point in front of the heading *Mission Statement*.
7. Choose **Page Layout**→**Page Setup**→**Breaks** , and then choose **Next Page**.
8. If necessary, choose **Home**→**Paragraph**→**Show/Hide**  to display formatting marks.
9. Scroll up and position the insertion point to the right of the paragraph symbol, just in front of the section break, and tap **Enter**.
10. Choose **References**→**Table of Contents**→**Table of Contents** , and then choose **Automatic Table 2** from the gallery.
11. Scroll up and review the table of contents.
12. Hover the mouse pointer over the *Initial Diagnostic Evaluation* entry in the table, and notice the pop-up message.
13. Press **Ctrl** and click the link.
14. Scroll up to the table of contents and click the table to select it.
15. In the table of contents, click the **Table of Contents**  button in the upper-left corner.
16. Choose **Remove Table of Contents** at the bottom of the gallery.
17. Save your file and leave it open.

Using the Update Table Button

When you make changes to headings or move text in a document, you need to update the table of contents. Word has an Update Table button that makes this task easy. Whenever the insertion point is anywhere in the table of contents, Word displays two buttons in the upper-left corner of the table. One button displays the Table of Contents gallery, which includes the command to remove the table of contents; the other button updates the table of contents.

FROM THE RIBBON

References→Table of Contents→Update Table

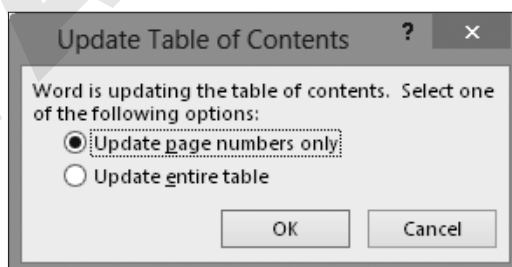
FROM THE KEYBOARD

F9 to update a table of contents

Displays the Table of Contents gallery —  — Updates the table of contents

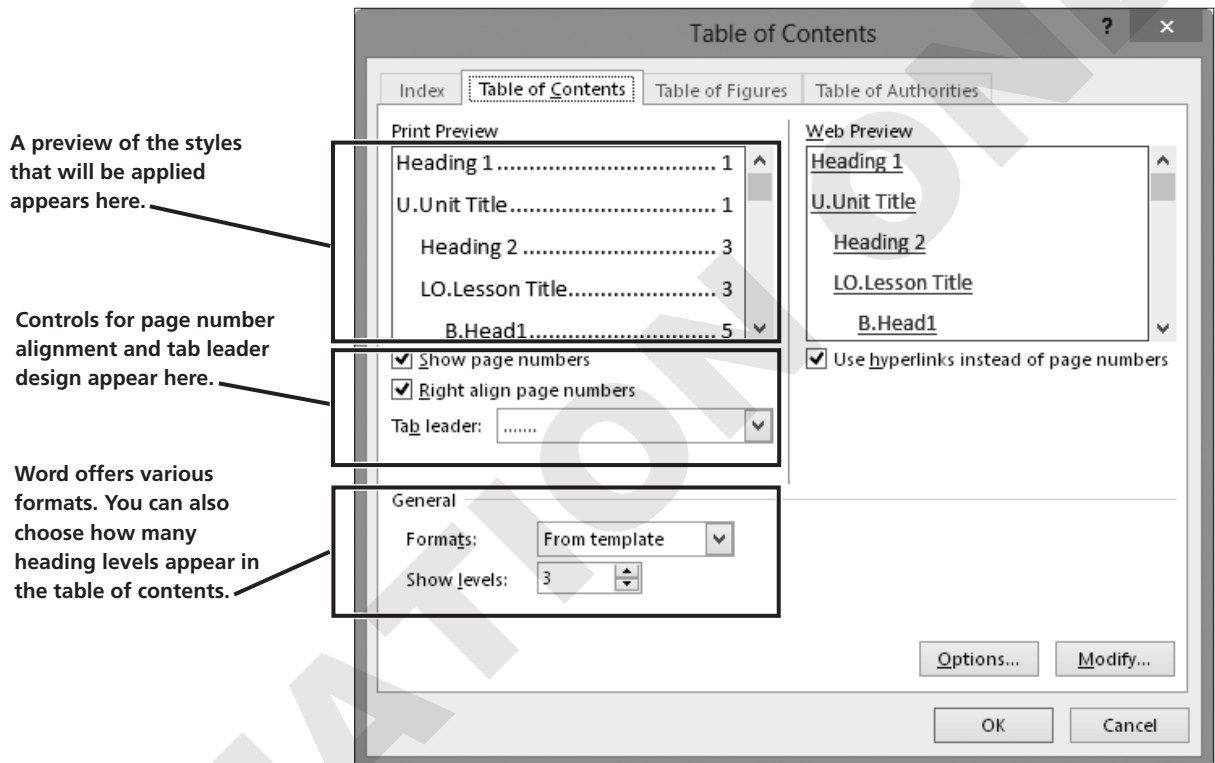


When you click the Update Table button, Word presents options for updating page numbers only or the entire table. Choose the page numbers options if you have been adding text but haven't changed any headings.



Using the Table of Contents Dialog Box

The Table of Contents gallery probably provides the fastest method for creating a table of contents, but if you wish to have more control over the formatting of your table, you can use the Table of Contents dialog box. When you use the dialog box, you must also manually add the title that precedes the table. In addition, when a table of contents is generated from the dialog box, Word displays no Table of Contents or Update buttons at the top of the table as it does for a table generated from the Table of Contents gallery. To update a manual table of contents, you can use the **[F9]** shortcut keystroke.



DEVELOP YOUR SKILLS WD04-D02

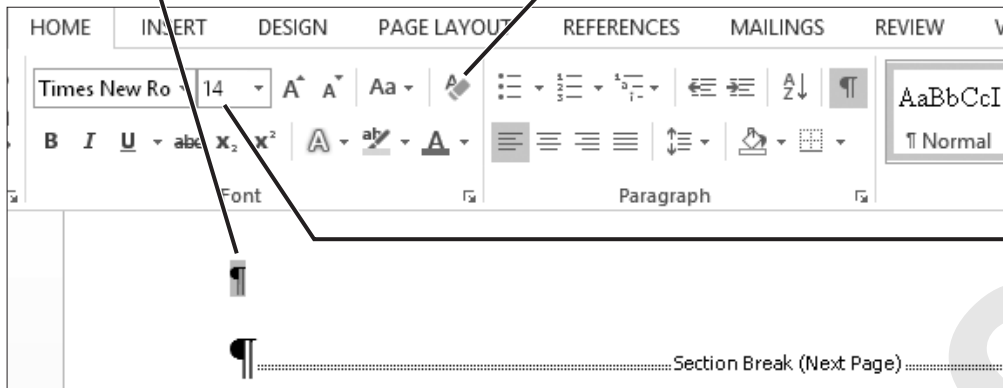
Insert a Table of Contents Using the Dialog Box

1. Save your file as **WD04-D02-RaritanP&P- [FirstInitialLastName]**.
2. If necessary, choose **Home→Paragraph→Show/Hide ¶** to display formatting marks.
3. Position the insertion point just to the left of the section break at the top of **page 2**.
4. Tap **[Enter]** to create a new blank line.

5. Follow these steps to format and add the table title:

A Select this paragraph symbol.

B Choose **Home**→**Font**→**Clear All Formatting**.



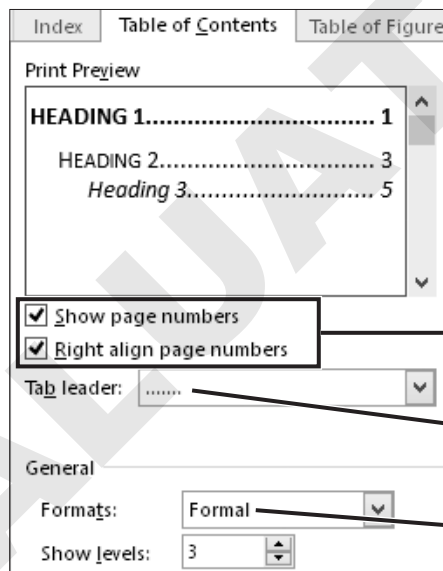
C Change the font size to **14 pt**.

D Type **Table of Contents** and tap **Enter**.

6. Choose **References**→**Table of Contents**→**Table of Contents**.

7. Choose **Custom Table of Contents** at the bottom of the gallery to open the Table of Contents dialog box.

8. Follow these steps to generate a table of contents:



A Make sure these checkboxes are checked.

B Make sure that dots are chosen here.

C Choose **Formal** here.

9. Click **OK** to insert the table of contents.

10. Scroll to the bottom of the table and delete the extra paragraph symbol.

11. Scroll down and search for the heading *Patient Attendance and Billing* and change *Attendance* to **Appointments**.

12. Scroll up to **page 2** and position the insertion point in the table of contents.

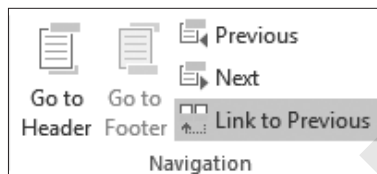
13. Tap **F9** to begin the update.
14. When the Update Table of Contents dialog box appears, choose **Update Entire Table** and click **OK**.

Table of Contents	
MISSION-STATEMENT	
SCOPE-OF-SERVICES.....	
PATIENT-MANAGEMENT-PROCEDURES....	
ENTRY-INTO-SERVICES.....	
PATIENT-APPOINTMENTS-AND-BILLING.....	
PATIENT-RECORDS.....	

15. Save your file.

Working with Multiple Headers and Footers

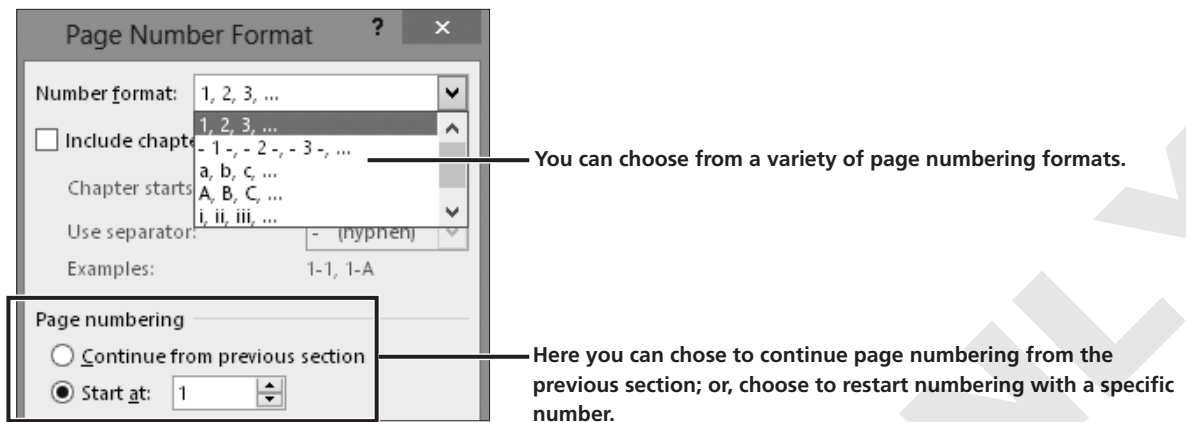
Initially, Word uses the same header and footer content throughout a document, because the Link to Previous feature is turned on by default, as shown in the following illustration.



When a document contains multiple sections, you can break the link between sections, and thereby create a new header and footer for each document section if you wish. For example, suppose you want to number the front matter of a long document using small Roman numerals and the body of the document using Arabic numerals. Creating additional sections is the first important step before creating multiple headers and footers within a document.

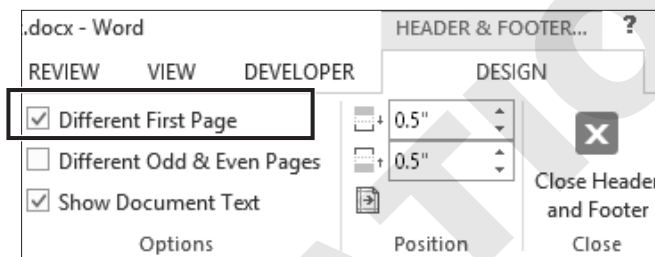
Restarting and Formatting Page Numbers

When you have more than one section in a document, you may wish to control the starting page number within a section. Typically the body of a document starts page numbering with 1 rather than continuing the numbering from the front matter. You may also want to control the page number formats. The Page Number Format dialog box provides options to restart numbering and to modify the number format, such as changing from Roman numerals to Arabic numerals.




Setting Up a Different First Page Header or Footer

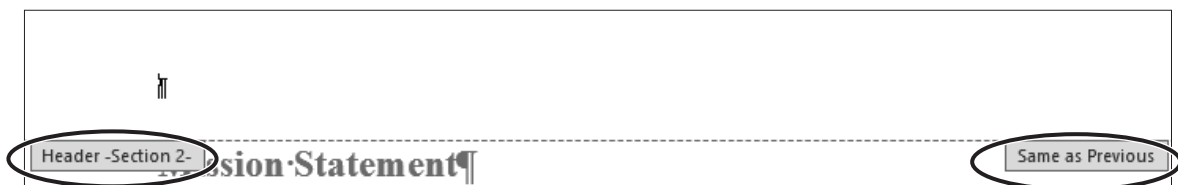
There may be times when all you want to do is set up a different header or footer on the first page of a document. For example, suppose you want all pages of a document numbered in the footer area of each page except for the cover page. You can set a different first page header or footer simply by checking **Different First Page**, as shown in the following illustration.




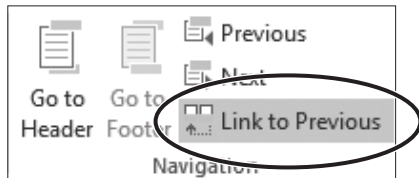
DEVELOP YOUR SKILLS WD04-D03





Work with Multiple Headers and Footers

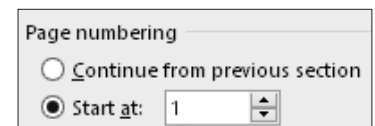
1. Save your file as **WD04-D03-RaritanP&P- [FirstInitialLastName]**.
2. If necessary, choose **Home**→**Paragraph**→**Show/Hide ¶** to display formatting marks.
3. Position the insertion point in **section 2**, which begins with *Mission Statement*.
4. Choose **Insert**→**Header & Footer**→**Header** , and then choose **Edit Header** at the bottom of the gallery.
5. Take a moment to observe the header area.



6. Tap **Tab** to position the insertion point at the center of the header area and then type **DRAFT**.
7. Format the header text with **bold 14 pt**.
8. Double-click in the body of the document to close the header area.
9. Scroll up to the table of contents.
10. Scroll down and position the insertion point in **section 2**.
11. Choose **Insert**→**Header & Footer**→**Footer** , and then choose **Edit Footer**.
12. Choose **Header & Footer Tools**→**Design**→**Navigation**.



13. Click the **Link to Previous**  button to turn it off and break the link between the two sections.
14. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Footer** , and then choose **Blank**.
15. Click **Type Here** and type **Policies & Procedures Manual**.
16. Tap **Tab** to position the insertion point in the center of the footer area, and then type **Raritan Clinic East**.
17. Tap **Tab** to position the insertion point at the right side of the footer.
18. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .
19. Choose **Current Position** and then choose **Plain Number**.
20. Choose **Header & Footer Tools**→**Design**→**Header & Footer**→**Page Number** .
21. Choose **Format Page Numbers** and then choose **Start At**.
22. Click **OK** to restart page numbering with a 1, and then double-click in the document body to close the header and footer areas.
23. Scroll up and notice that the footer does not appear on the table of contents page. Scroll down and observe the footer text in the rest of the document.
24. Scroll to **page 2** and position the insertion point in the table of contents.
25. Tap **F9**, choose **Update Entire Table**, and click **OK**.
26. Save your file.



Creating an Index

Word offers two distinct procedures for creating an index:

- Manually marking items to include in the index
- Generating the index by creating a concordance of words to be included in the index

Regardless of which procedure you use, Word automatically generates the index using the words and phrases you identify. In addition, Word sorts the words and phrases alphabetically and groups the contents of the index according to the first letter of the word or phrase. Index styles format the main entries and subentries and apply other formats to the index.

Index	
A	M
agencies1, 4, 5, 6	management1
appointment2	mission1
appointments2	
assessment1, 3, 4	N
	Neonatology1, 3
B	O
billing2	Orthopedics1, 3
Billing2, 11	
C	P
Cardiology1, 3	patient1, 2, 3, 4, 5, 6
certification1	Patient2
color3	files3
custodial1, 2	records2

Main entry

Subentries

Marking Index Entries

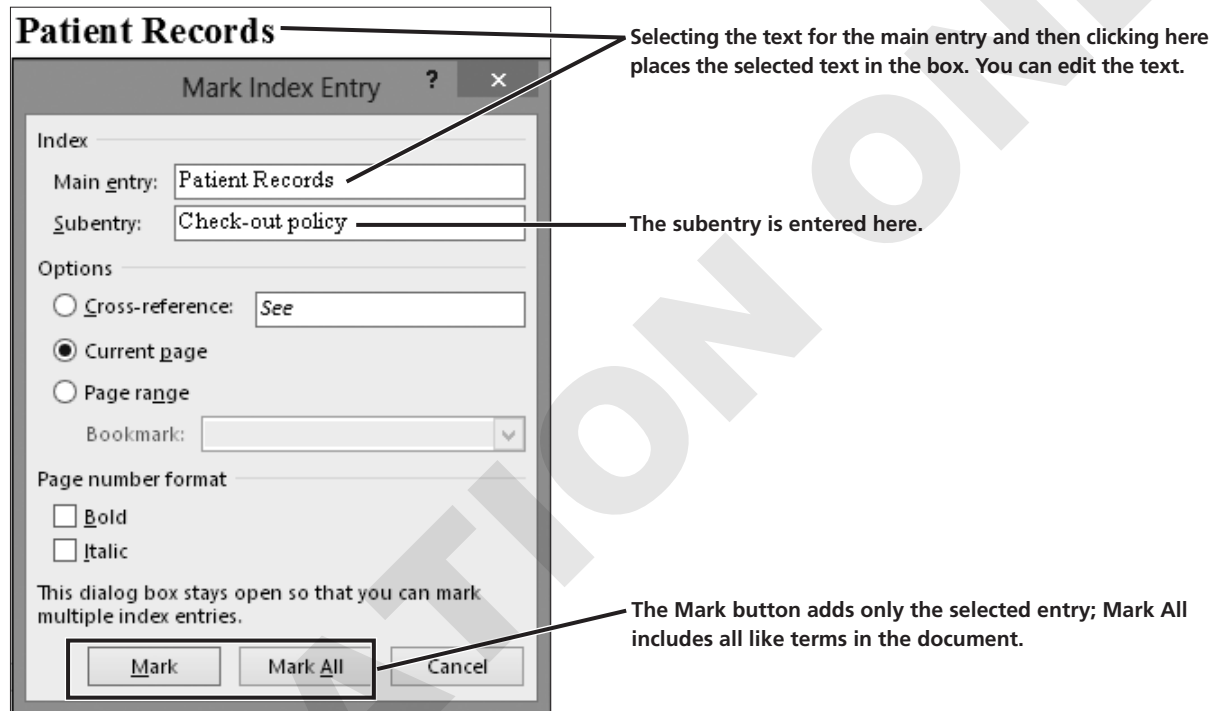
The first step in creating an index is to mark the main index entries and subentries. These are the words and phrases that will appear in the index. For example, a main entry might be *Patient*, and its subentries might be *files* and *records*.

Entries are marked using the Mark Index Entry dialog box. It's important to note that marking index entries is a case-sensitive action. If you mark all occurrences of a word such as *Billing* for inclusion in the index, Word will only mark those occurrences for the word where the *B* is capitalized. So, it's important to consider which occurrences you want marked before selecting Mark All.

Marking Index Subentries


Index subentries appear in the index indented below main entries. Entering subentries in the Mark Index Entry dialog box is a bit more tedious than marking main entries. As a result, many organizations create indices using only main entries. There are two primary ways to create subentries.

- Type text for the subentry as you mark text for main entries.
- Select the text for the subentry, which places it in the Main Entry field. Cut the text from the Main Entry field and paste it in the Subentry field. Type the Main Entry text.



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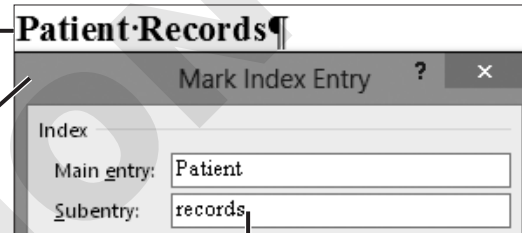
Mark Index Entries

1. Save your file as **WD04-D04-RaritanP&P-[FirstInitialLastName]**.
2. Go to the first page of the body of the manual.
3. If necessary, choose **Home**→**Paragraph**→**Show/Hide** ¶ to display the formatting marks.
4. Select the heading *Mission Statement*.
5. Choose **References**→**Index**→**Mark Entry** .
6. Type **Goals** in the Main Entry box to replace the text that Word automatically inserted.
7. Click **Mark** at the bottom of the dialog box.
8. If necessary, drag the dialog box to the side, and notice that Word inserted a {XE“Goals”} code in the document.

9. Select the word *specialties* at the end of the second line in the second paragraph under the *Mission Statement* heading.
10. Click the **Mark Index Entry** dialog box to activate it, and then click **Mark** to use the proposed text as the main entry.
11. Select *General Medicine* in the first line of the third paragraph below *Scope of Services*, click the dialog box, and click **Mark**.
12. Scroll down and select *Patient* in the heading *Patient Appointments and Billing*, click the dialog box, and click **Mark**.
13. Select *Billing* in the heading *Patient Appointments and Billing*, and then click the dialog box.
14. Click **Mark All** to mark all occurrences of *Billing* for inclusion in the index.
15. Select *billing* toward the end of the first line of the third paragraph below *Patient Appointments and Billing*, click the dialog box, and click **Mark All**.
16. If necessary, scroll down to the *Patient Records* heading. Then, follow these steps to mark records as a subentry:

A Select *Patient* in the heading.

B Click the **Mark Index Entry** dialog box to make it active.



C Type **records** in the Subentry field and click **Mark**.

17. Navigate to the second paragraph below the *Patient Records* heading, select *files* in the first line, and click the dialog box to make it active.
18. Double-click *files* in the Main Entry field and then press **Ctrl** + **X** to cut it.
19. Click the **Subentry** field, and then press **Ctrl** + **V** to paste *files* into the field.
20. Type **Patient** in the Main Entry field, and then click **Mark**.
21. Close the **Mark Index Entry** dialog box.
22. Save your file.

Generating Index Entries Using a Concordance

If a document is extremely long, marking index entries can be overwhelming. Word offers an automatic option for marking words and phrases to be included in an index. This option allows you to create a list of words and phrases you want to include and saves it as a separate file that acts as a concordance file.

When you use a concordance file to generate an index, it's important to know how Word reacts. These guidelines will provide you with some basic information.


- The list of words and phrases to be included as main entries should be typed in one column straight down the left margin of the document or in the first column of a table.
- The document should contain only the words and phrases to be marked.
- To mark main entries with subentries, create the concordance using a table layout. In the first column, type the words you want to mark as the main entry. In the second column, type the main entry followed by a colon, followed by the text for the subentry, without spaces, as shown in the following illustration:

patient	patient:records
---------	-----------------

- Entries can be listed in any order in the concordance—Word will sort them and group them alphabetically when you generate the index. However, sorting the words helps identify duplicate words in the concordance.

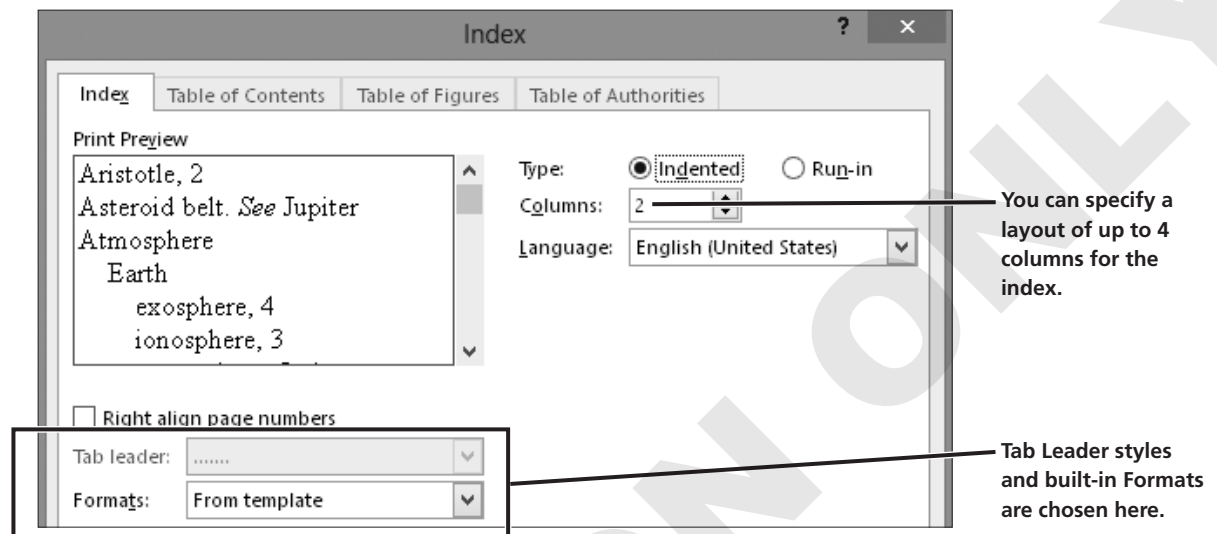
DEVELOP YOUR SKILLS WD04-D05

Mark Index Entries Using a Concordance

1. Save your file as **WD04-D05-RaritanP&P- [FirstInitialLastName]**.
2. If necessary, choose **Home**→**Paragraph**→**Show/Hide** ¶ to display formatting marks.
3. Open **WD04-D05-P&PConcordance** from the **WD2013 Lesson 04** folder.
4. Scroll through the document, review its contents, and then close the document.
5. Position the insertion point at the top of the document.
6. Choose **References**→**Index**→**Insert Index** .
7. Click **AutoMark** at the bottom of the dialog box to display the Open Index AutoMark File dialog box.
8. Navigate to the **WD2013 Lesson 04** folder and double-click **WD04-D05-P&PConcordance**.
9. Scroll through and review the document.
10. Turn off formatting marks.
11. Save the file.

Inserting an Index

After all of the index entries are marked, you can generate the index using the Index dialog box. You can choose the overall format for the index and several other formatting options. The normal position for an index is at the end of a document on a new page or section.



Modifying and Deleting Entries, and Updating the Index

There are several ways to modify an index once you create it.


- You can select the index and display the Index dialog box and then change various formatting options.
- You can also format the index directly; however, the format active in the Index dialog box will be reapplied if you update the index.
- You can change the text of an entry by replacing it directly in the code that was created when you originally marked it. Then update the index.
- You can delete an index entry by selecting the index code, deleting it, and then updating the index.



FROM THE RIBBON

References→Index→
Update Index

DEVELOP YOUR SKILLS WD04-D06

Insert and Modify the Index

1. Save your file as **WD04-D06-RaritanP&P-[FirstInitialLastName]**.
2. Press **Ctrl + End** to move to the end of the document.
3. Type the heading **Index** and tap **Enter**.
4. Select the heading, and format the text as **bold 16 pt**.
5. Position the insertion point on the blank line below the *Index* heading.
6. Choose **References→Index→Insert Index** .

7. Choose **Formal** from the Formats list at the bottom of the dialog box, and then click **OK** to insert the index.
8. Click anywhere in the index.
9. Choose **References**→**Index**→**Insert Index** .
10. Choose **Modern** at the bottom of the dialog box, and then choose **Run In** at the top-right corner of the dialog box.
11. Click **OK**. Click **OK** when the message appears asking if you want to replace the selected index.
12. Click **Undo**  twice to reverse the change.
13. Save and close the file.

Formatting Text with Styles

A style is one of the most powerful formatting tools in Word. It is a *group of formats* enabling you to apply multiple formats to a block of text all at once. Styles are based on the current template's theme, which is a set of colors, fonts, and graphic effects. Word contains styles for document elements, such as headings, titles, and special character formats, providing consistent formatting throughout a document.

Understanding Types of Styles

Word has many built-in styles, and you are always working within a style in Word. There are two basic types of styles: character and paragraph.

- **Character styles:** Character styles are applied to the word the insertion point is in or a selected group of words. Character styles only contain character formats, not paragraph formats. You can apply character styles to text *within* a paragraph that is formatted with a paragraph style.
- **Paragraph styles:** Paragraph styles are applied to all text in selected paragraphs or to the paragraph containing the insertion point. You can use any character or paragraph formats in a paragraph style. For example, you may want to format a heading with a large, bold font (character formatting) and apply paragraph spacing before and after the heading (paragraph formatting).

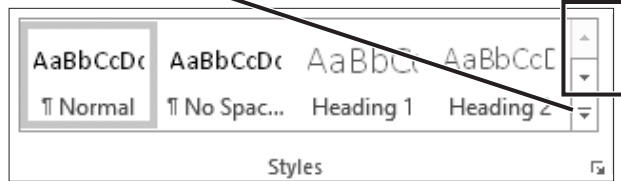
Using the Styles Gallery and the Styles Task Pane

Styles are located in the Styles gallery on the Ribbon and in the Styles task pane. Live Preview makes it easy to test a variety of styles in the gallery, while the Styles task pane provides style descriptions in ToolTips.

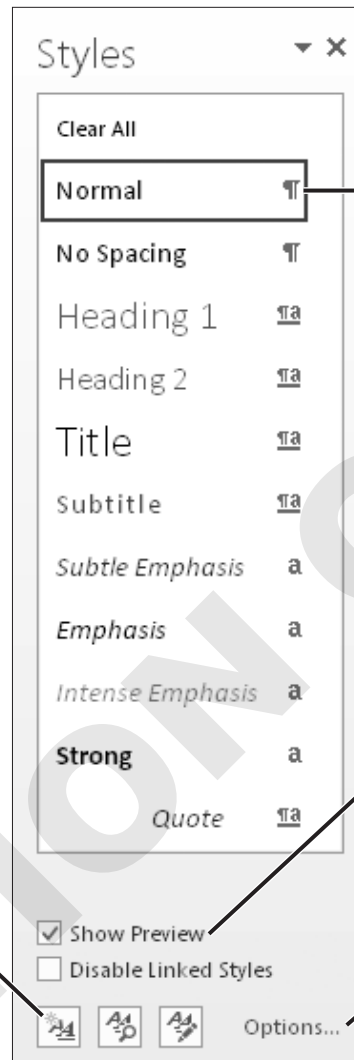
The gallery is limited to frequently used styles and is always at hand on the Ribbon. The Styles task pane is where you go if you need a more in-depth approach to styles.

The More button displays the entire gallery.

Use these buttons to scroll up and down in the gallery.



Styles gallery



The style in effect at the insertion point is surrounded by a rectangle here.

The New Style button opens a dialog box where you can create a new style.

This option displays the style names formatted with their own style, as shown here.

The Options link opens a dialog box containing style pane options.

Styles task pane

Collapsing Heading Topics

When you apply a heading style and then hover the mouse pointer over the heading, a small triangle marker appears at the left. You can click the marker to collapse and expand the text below it. This allows you to focus on certain portions of the document.

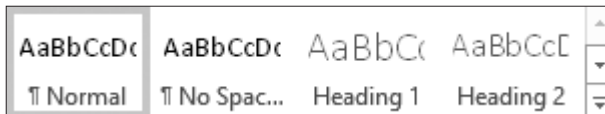
In this example, clicking the triangle marker collapsed the text below the heading.



DEVELOP YOUR SKILLS WD04-D07

Apply Styles

1. Open **WD04-D07-StylesRprt** from the **WD2013 Lesson 04** folder and save it as **WD04-D07-StylesRprt-[FirstInitialLastName]**.
2. Click anywhere in the report's main heading, **Social Media in Universities**.
3. Follow these steps to view and apply the Title style to the main heading.



A Click the **More** button to display the Styles gallery on the Home tab.

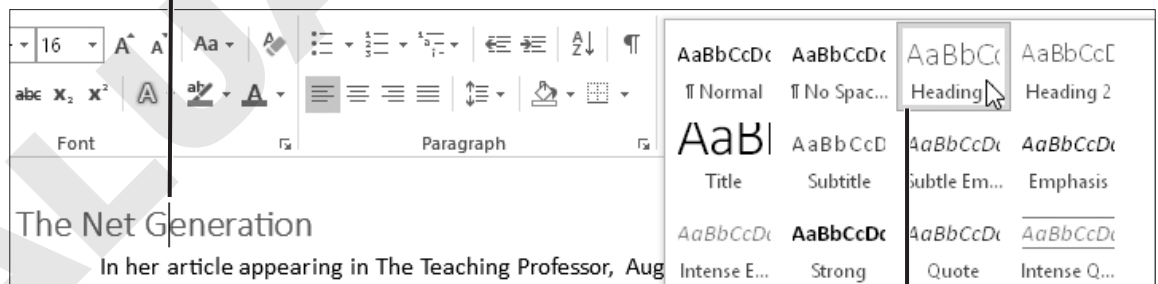


B Hover the mouse pointer over **Title** to see its effect, and then click to apply the style.

4. Follow these steps to apply the Heading 1 style to the next heading:

A Click to place the insertion point here.

B Click **More** in the bottom-right corner of the Styles gallery.



C Click **Heading 1** to apply the style.

5. Follow these steps to apply the Heading 1 style from the Styles task pane:

A Click the Styles group **dialog box launcher**.



B Click to place the insertion point here.

C Click **Heading 1** to apply the style.

6. Using the method of your choice, apply the **Heading 1** style to the remaining two headings: *University Recruiting Through Social Networking* and *Social Media Benefits for Students*.
7. Scroll up to *The Net Generation* heading.
8. Hover the mouse pointer over the heading to display the **triangle marker** to the left of the heading.
9. Click the marker to collapse the text below the heading.
10. Click the marker again to expand the text.
11. Save the report.

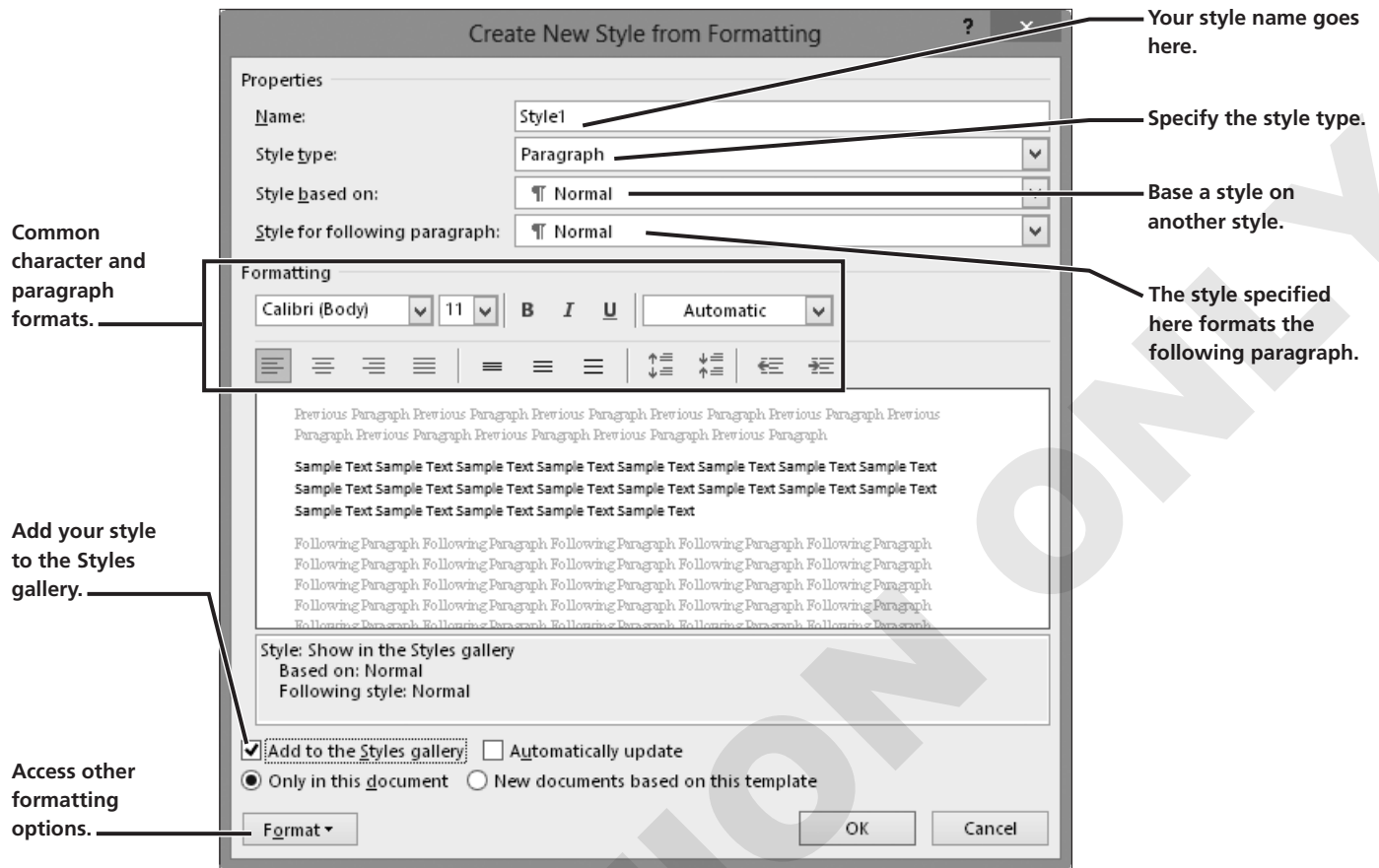
Creating a New Custom Style

Thus far, you have applied built-in styles. However, there may be situations where the built-in styles do not meet your needs. For example, you may have corporate formatting standards set for different types of documents. You can create custom styles to meet those standards.

There are two approaches you can take to create custom styles. The method you choose is a matter of personal preference; both are equally effective.

- **Style by definition:** Choose all formats in the Create New Style from Formatting dialog box.
- **Style by example:** Format a block of text with the formats you wish to include in your style. The Create New Style from Formatting dialog box is able to copy the formats in your formatted text.

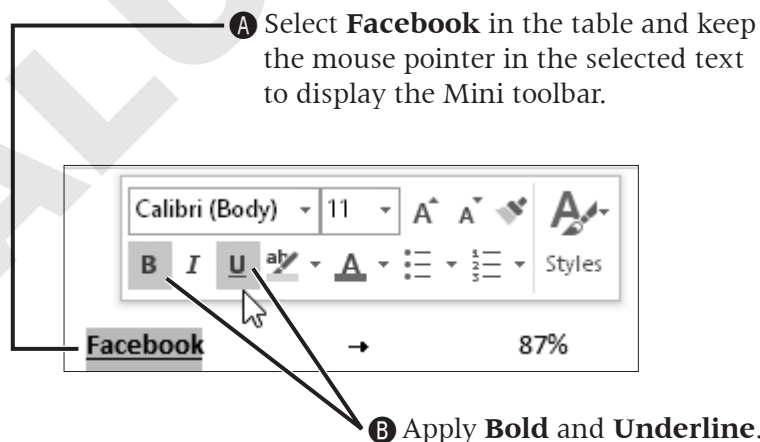
The following illustration points out the important elements in the Create New Style from Formatting dialog box.




DEVELOP YOUR SKILLS WD04-D08

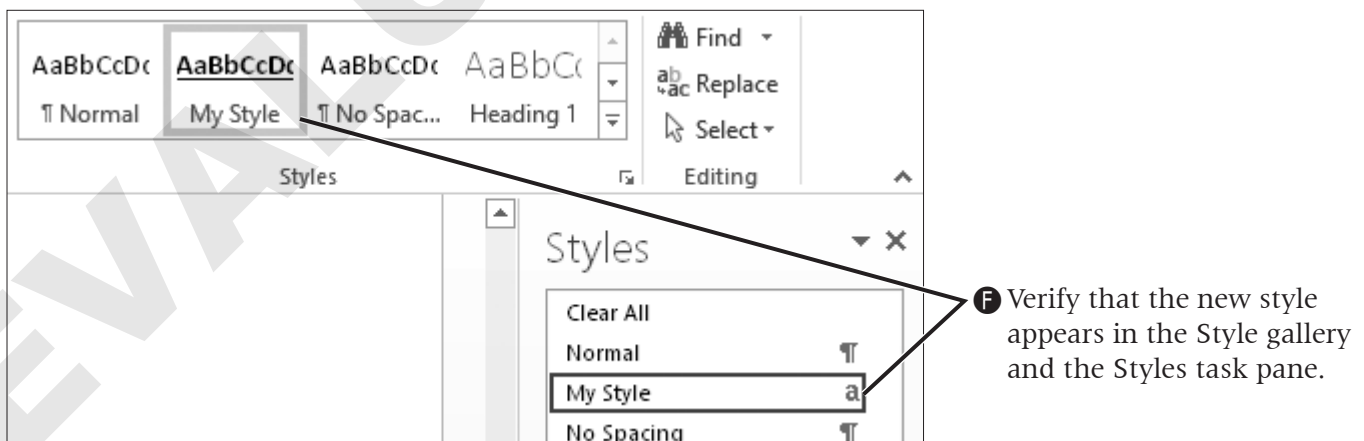
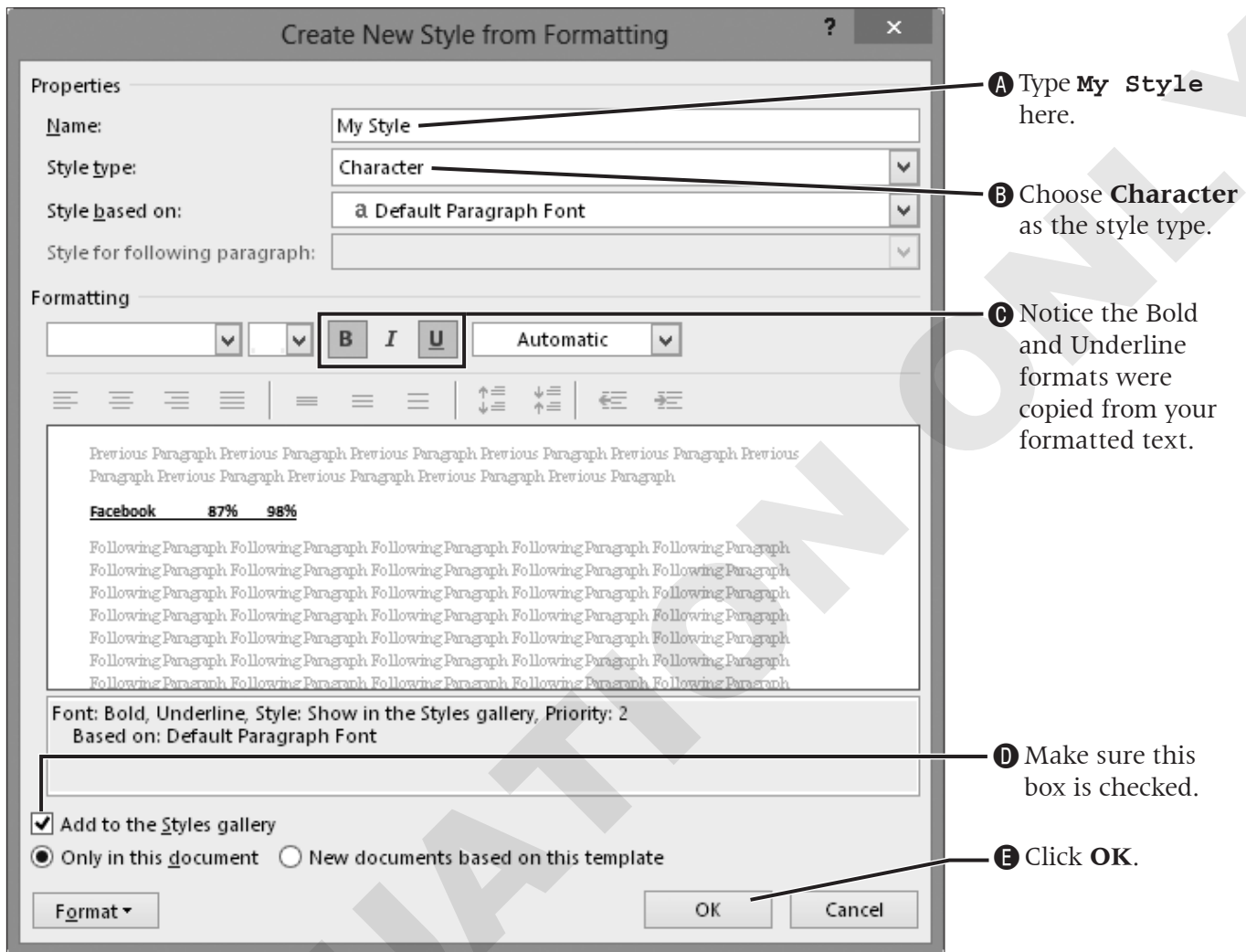
Create a New Style

1. Save your file as **WD04-D08-StylesRprt - [FirstInitialLastName]**.
2. Follow these steps to format the "style by example" text:



3. If necessary, choose **Home**→**Styles** and click the **dialog box launcher**  to open the Styles task pane.

4. Click **New Style**  in the bottom of the task pane. (Use ToolTips if necessary.)
5. Follow these steps to complete the new style:



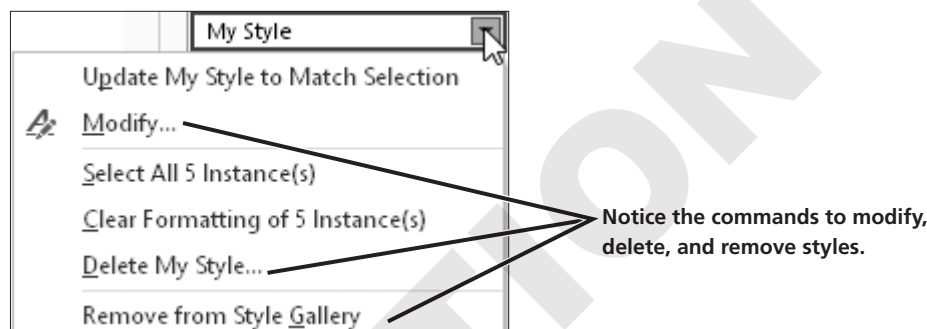
6. Select **Twitter** and choose **Home**→**Styles**→**My Style**.

7. Select **Blogs** and click **My Style** in the Styles task pane.
8. Use either method to apply the style to **Podcasts**, and then click in the document to deselect the text.
9. Save the report.

Modifying, Removing, and Deleting Styles

You can modify built-in styles as well as styles that you create. The ability to modify styles is one of the great powers of Word. You can make global formatting changes by modifying a style. When you change a style, the changes are applied to all text in the current document that is formatted with the style.

You can remove a style from the Styles gallery without removing it from the Styles task pane. You can leave it in the task pane for future use, or if you prefer, you can delete it from the task pane. Completely deleting a style removes its formatting in the document.



DEVELOP YOUR SKILLS WD04-D09

Modify and Remove a Style

1. Save your file as **WD04-D09-StylesRprt- [FirstInitialLastName]**.
2. Hover the mouse pointer over **My Style** in the Styles task pane and click the **menu button ▼**.
3. Choose **Modify** from the menu to open the Modify Style dialog box.
4. Click **Italic I** to add that format, and click **OK**.
5. Hover the mouse pointer over **My Style** in the Styles task pane and click the **menu button ▼**.
6. Choose **Remove from Style Gallery**.
7. Open the menu for **My Style** in the task pane, and choose **Delete My Style**.
8. When the message appears verifying the deletion, click **Yes**.
9. Close the Styles task pane, and save your report.

Navigating with the Navigation Pane

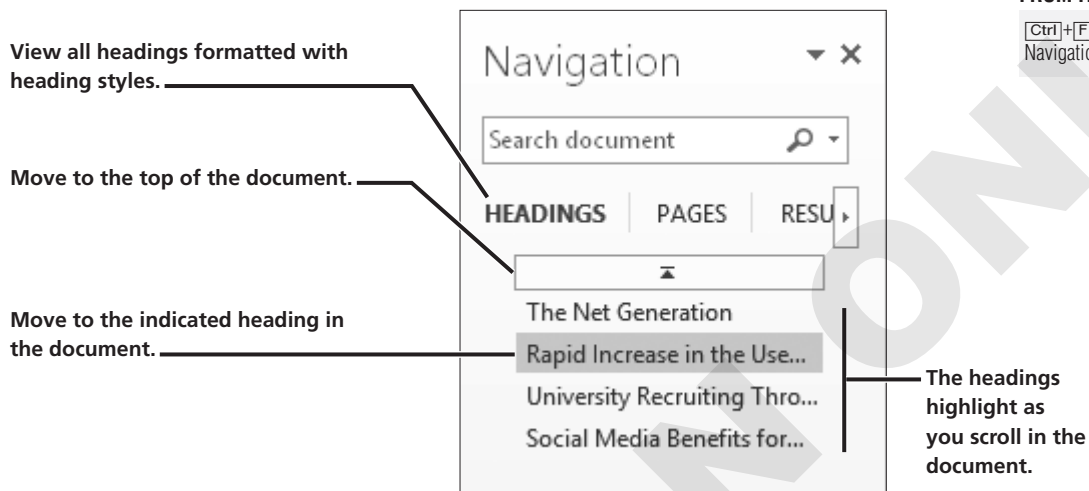
The Navigation pane provides a great way to navigate through your document using heading styles. This gives you a bird's-eye view of your document so you can easily see the overall flow of topics.

FROM THE RIBBON

View→Show→
Navigation Pane

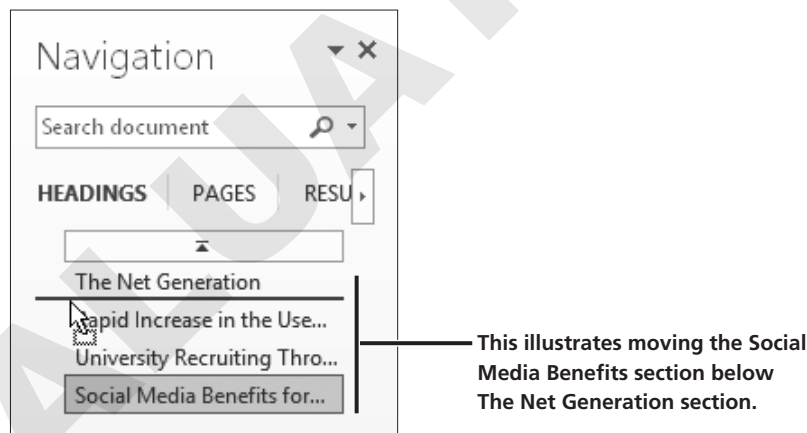
FROM THE KEYBOARD

[Ctrl]+[F] to open the
Navigation pane



Rearranging Topics

Rearranging parts of your document is one of the most powerful uses of the Navigation pane. When you drag a heading to a new location, all of its lower-level headings and associated text move with it.



DEVELOP YOUR SKILLS WD04-D10**Navigating and Rearranging Topics**

1. Save your file as **WD04-D10-StylesRprt-[FirstInitialLastName]**.
2. Choose **View**→**Show**→**Navigation Pane**, and click **Headings** at the top of the pane.
3. Click the **Social Media Benefits for Students** link in the pane to jump to that topic.
4. Scroll to the top of the report and notice that the highlighting in the pane changes as you scroll to show you where you are in the document.
5. In the Navigation pane, drag the **Social Media Benefits** topic below **The Net Generation** topic.
6. Scroll in the document to see how the topics were rearranged.
7. If necessary, delete the extra blank line below The Net Generation topic and, if necessary, below Social Media Benefits for Students topic to tighten up the text.
8. Close ☐ the **Navigation pane**, and then save and close the document.

Concepts Review

To check your knowledge of the key concepts introduced in this lesson, complete the Concepts Review quiz on the student resource center.