

# Working with templates & styles with *Microsoft Word for Windows 2000*

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## **Abstract**

This self-training note explains what *templates* and *styles* are and how to use them to give your document a standardised lay out. When you use *Microsoft Word for Windows 2000 styles* to format your document you can also take advantage of other features of *Microsoft Word for Windows 2000* to automate the creation of tables of contents, numbering of section headings and cross references to numbered items in your document.

The material has been designed for use on Birkbeck College CCS student workstations.


- If you are using the material for self-training on CCS student workstations then you need a CCS username and password. If you have not received this then please contact CCS Help Desk. You should refer to Document 3.38 'Getting Started on CCS Workstations' for instructions on logging in & logging out.
- If you are using the material for self-training on CCS staff workstations then you need a CCS username and password. If you have not received this then please contact your local system support person. You should refer to your own local documentation for procedures for logging in and shutting down the computer.
- If you are using your own PC with *Windows* and *Microsoft Office 2000* then you should be able to do all the exercises given here. Note that CCS use custom installation of *Microsoft Office*, so if you find some features are missing on your own PC, you may need to re-install, selecting all options.
- If you are using other versions of *Microsoft Office* (such as 97 or XP) there may be minor differences in the appearance of some screens.

Before attempting the exercises you need to be familiar with the topics, covered in Document 5.98, 'Getting started with *Microsoft Word for Windows 2000*'

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## About This Document

- *Italics* are used to introduce new terminology, for emphasis, and for proprietary names. For example *copying* is a term that is defined later in the text, *A4 paper* is emphasised. *Windows NT* is a proprietary name for the software that controls the computer.
- Words that the computer uses to prompt you and titles of boxes are in **bold type**, e.g. the **Locate Value** box.
- Words that you type or choose are in **bold type**, e.g. **File**.
- Keys which you press are shown in small capitals e.g. press ALT.
- Press KEY1 + KEY2 means press both keys together e.g. press CTRL + Z
- Press KEY1, KEY2 means press each key consecutively e.g. press A, B.
- Tasks for you to try as you work through the notes are labelled **Exercise**, e.g. **Exercise 1 Sorting Data** and the steps that you do to perform the task are marked by round bullets (●).
- Hints and tips are indicated by 

## 1 Introduction

*Microsoft Word for Windows 2000* has many features that simplify the creation of long, complex documents by allowing you (or a colleague) to create standard layouts using templates and styles.

In this document you will learn

- Basic terminology used by *Microsoft Word for Windows 2000* (styles, templates etc.)
- How to create common *styles* for headings
- How to automatically generate a table of contents so that *Microsoft Word for Windows 2000* will automatically renumber the pages in the table if you change the document.
- How to use an *AutoCorrect* entry to abbreviate a commonly used phrase.
- How to automatically number your section headings and create a cross reference to a section. *Microsoft Word for Windows 2000* will automatically update the cross references if you move the section
- How to add an automatically numbered caption to a figure or table so that it will be automatically renumbered if you move it. *Microsoft Word for Windows 2000* will also update the cross references to the object.
- How to print tables and figures that are too wide for the A4 page.

The document consists of a mixture of explanations and practical exercises for you to try for yourself. You should work through the exercises in sequence, as they usually depend on work that you have done in previous exercises.

## 2 Basic Concepts

### 2.1 What Is a Template?

A *template* is a special kind of document that allows you to standardise the appearance of your documents. Templates can be shared between colleagues so that you can produce documents having a common appearance.

Today we will create a simple template using *Headings, Styles, Table of Contents, and AutoCorrect*.

### 2.2 Where are templates stored?

On CCS teaching workstations your own templates are stored on your network drive in **N:\msoffice**. You also have access to the templates provided with *Microsoft Word for Windows 2000*. These are stored in **C:\Program Files\Microsoft Office\Templates**.

Users of Birkbeck staff workstations also have access to the templates provided with *Microsoft Word for Windows 2000*. These are stored in **C:\Program Files\Microsoft Office\Templates**. Your IT support person will advise you where to store your own templates, as appropriate to your needs.

## 2.3 Terminology for working with Templates

### 2.3.1 The Normal Template

When you start *Microsoft Word for Windows 2000* your new documents use a template called **Normal.dot**. **Normal.dot** contains a number of built in styles for headings, tables of contents and also includes autocorrection for common typing errors so we will base our template on **Normal.dot**.

### 2.3.2 Paragraphs

What *Microsoft Word for Windows 2000* interprets as a paragraph may not be quite what you would have expected. A *paragraph*, as far as *Microsoft Word for Windows 2000* is concerned, is created whenever you press the ENTER key. If you have several short lines *Microsoft Word for Windows 2000* will regard each *line* as a *paragraph*. Paragraph markers are symbols used to delimit paragraphs, indicated by the *Show/Hide* symbol (see right). Paragraph markers are not normally displayed, but if you want to see them click on the *Show/Hide* button on the standard toolbar. ¶

### 2.3.3 Styles

*Microsoft Word for Windows 2000* on-line help defines a *paragraph style* as follows:

*A paragraph style controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders, and can include character formatting. If you want a paragraph to have a particular combination of attributes that aren't in an existing style (for example, a bold, italic, center-aligned heading in the Arial Narrow font), you can create a new paragraph style.*

When you open a new document the *normal* style is selected. You can type everything in normal style, using the bold, italic, underline buttons (or equivalent short cut keys) to change the appearance. However, for a longer document it is more convenient to change the appearance by selecting a different *style*. When you are working with styles make sure that you have the *formatting toolbar* displayed. If you cannot see the toolbar select **Toolbars** from the **View menu** and check that the one you need has a tick next to it.

## 2.4 Overview of creating a template

*Microsoft Word for Windows 2000* does allow you to create a completely new template from scratch. However, as the normal template contains useful things we will base our template on **normal.dot**. Note that you could use any template as the basis for your template. Templates often contain placeholders for items that are mandatory, e.g. title, table of contents.

The steps are:

- Open a new document
- Create the layout that you require. In our example we will have a title on the first page. The next page will contain the table of contents. Subsequent pages will contain the body of the document.
- Save the document in your template folder as a file of type template (**.dot**)

### 3 Working with Styles

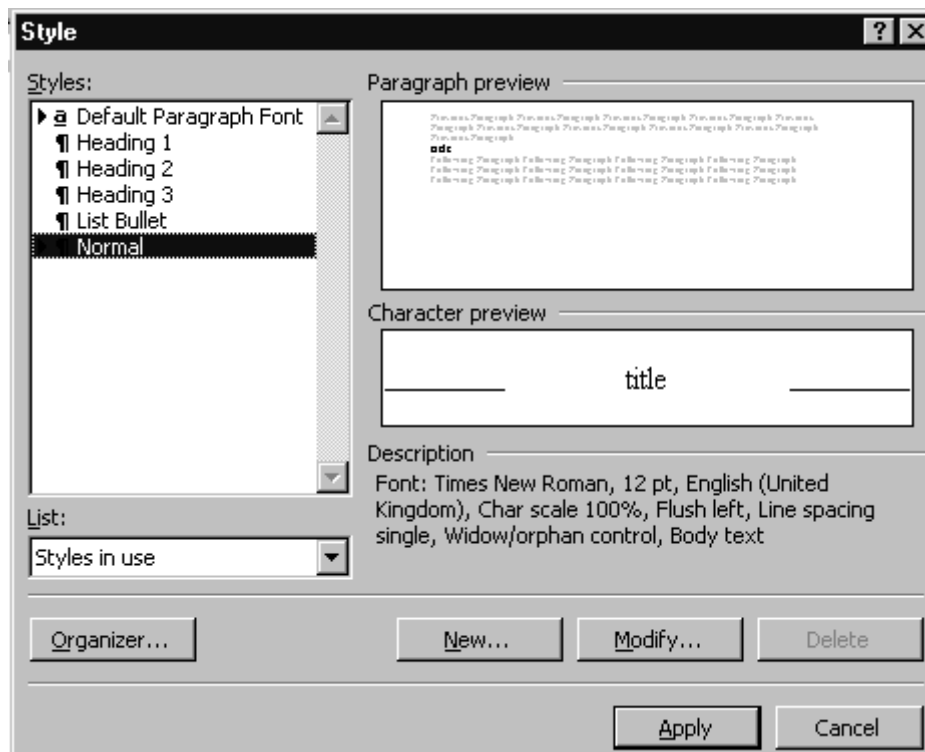
#### 3.1 Creating a new style

If you have not logged in and started *Microsoft Word for Windows 2000*, please do so now.

#### Exercise 1 Create a new style

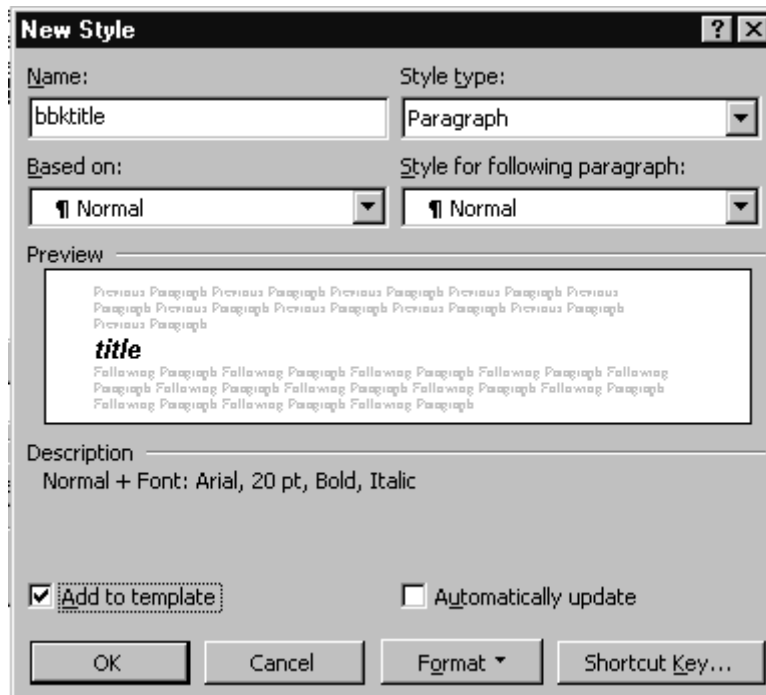
- Type the word **Title** at the top of the document
- Select the word **Title** and change the format to **bold, italic, Arial, 20 pt, centre justification**
- From the **format** menu choose **Style**
- In the **Style** dialogue box (Figure 1) click on the **New** button

Figure 1 Style dialogue box



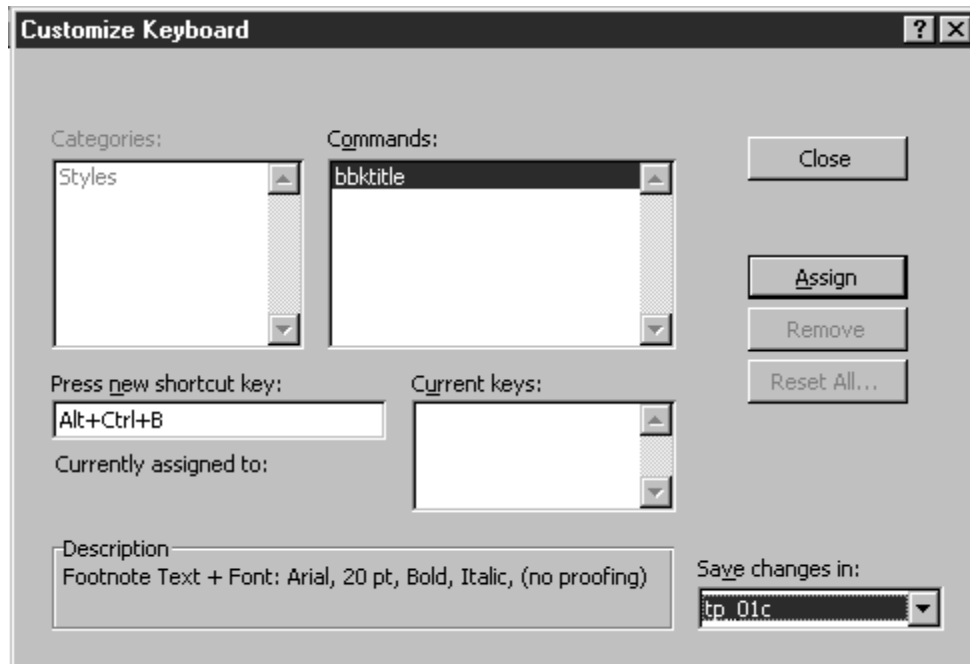
- In the **New Style** dialogue box (Figure 2)
  - Type **bbktitle** in the **Name** box
  - Choose **Normal** from the drop down menu in the **Style for following Paragraph** box
  - Check the **Add to Template** box to make the style available in future documents based on this template.
  - Click on the **Shortcut Key** button

Figure 2 New Style



- Position the cursor in the box labelled **Press New Shortcut Key** in the Customise **Keyboard** dialogue box and press CTRL+ALT+B *Note that if you have already used this key assignment for another function that you will have to choose different one.*
- From the drop down menu in the **Save the changes box** choose the current document. In the example document was called tp\_01c. Yours will be different. Your dialogue box should look similar to Figure 3 (see next page)

Figure 3 Customise Keyboard



- Click on **Assign**
- Click on **Close** to close the **Customise Keyboard** dialogue box
- Click on **O.K** to close the **New style** dialogue box
- Click on **Apply** to close the **Style** dialogue box

You have now created a placeholder and style for the title. After the title page we will create a page for the table of contents. As our document does not yet have any contents, we will leave some space for them and return to this page later.

### Exercise 2 Practice creating your own style

- After the word **Title** create a page break by pressing **Ctrl + Enter** keys.
- At the top of the page type the word **Contents**.
- Using the technique that you learnt in Exercise 1, create a style called *bbkcontents* to use as the header for the content page. I chose **bold, italic, Arial, 14 pt, left justification** for mine, but you may like to experiment with something different.
- After the contents header insert two or three blank lines, then insert a page break.

### 3.2 Using a built in style

*Microsoft Word for Windows 2000* provides a number of built in styles for headers, which you can select either by using a toolbar or by a keyboard short cut.

- To select a style from the toolbar click on the ▼ on the left of the *formatting toolbar* (Figure 4) to get the *style menu*. Then click on the style that you want to use.

**Figure 4 Formatting Tool Bar**

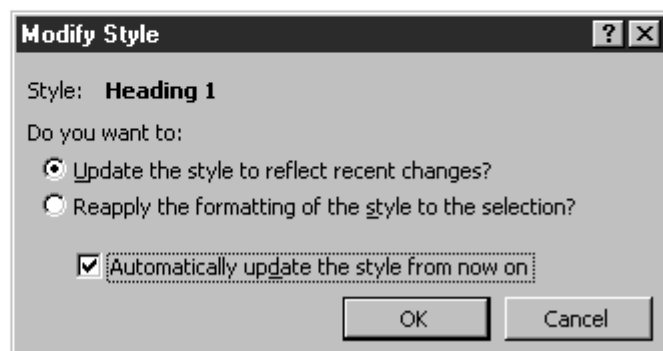
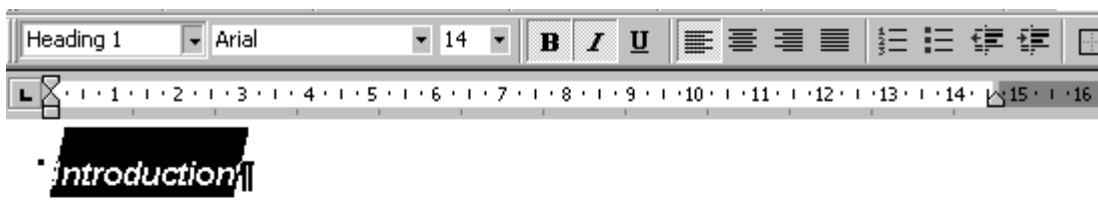


- You can also use keyboard short cuts to switch to header styles and we will see some examples in the following exercises. For a full list of Microsoft Word for Windows 2000 keyboard short cuts see the Answer Wizard in *Microsoft Word for Windows 2000 Help*. (type **keys** in the 1st box). You can start Help either from the **Help** menu or by pressing the **F1** key.

### Exercise 3 Modify a built in Heading style

- Press CTRL+ALT+1 to change to *Heading 1* style. You will notice that the style menu on the formatting toolbar changes to **Heading 1**.
- Type the place holder **Heading 1**
- Make the changes that you want, e.g. **Times New Roman, bold, 14 pt.**
- Click on the **Style** menu on the formatting toolbar. (You cannot use the short cut keys for this step)
- Click on the style on the menu *again*. *Microsoft Word for Windows 2000* will display a dialogue box asking if you want to update the style (Figure 5). (If *Microsoft Word for Windows 2000* does not display this prompt it is usually because you have not made any changes. *Microsoft Word for Windows 2000* will not ask you to update changes if you have not made any!)

**Figure 5 Modifying a built in Header Style**





- Make sure that the box **Automatically update the style from now on** is checked.
- Click on **O.K**
- Deselect the header and position the cursor at the end of the line.
- Press the ENTER key to return to normal style. You will see that the style menu on the formatting toolbar changes to **Normal**
- Using the same technique, insert placeholders for **heading 2** (short cut key is CTRL + Alt +2) and **heading 3** (short cut key is CTRL + Alt +3).
- Make the last line in your document a blank line in **normal** style. This also acts as a placeholder for your document text.


## 4 Tables of Contents

If you use *Heading Styles* in your document *Microsoft Word for Windows 2000* can use them to generate a table of contents based on the heading styles. The page numbers on which the headings appear will be inserted automatically. This is very useful if you insert something in the middle of the document. You do not have to type the whole table again, simply update.

### Exercise 4 Insert a table of Contents

- Go back to the content page in your document, and position the cursor on one of the new line placeholders that you inserted.
- Choose **Index and Tables** from the **Insert menu**
- Make sure that the **Table of Contents** tab is selected.
- Choose a format from the list of formats. I used **Formal** format.
- Click on **O.K**

*Microsoft Word for Windows 2000* will insert a table of contents, using the placeholders Heading 1, Heading 2 etc. We will see later how to replace the placeholders with your own text.

 You will not be able to modify any of the built in tables of content styles. The modify button will be greyed out. However, you can modify your own styles in your template.

#### 4.1 Saving a template

For the next exercise we will assume that you are working on a CCS teaching workstation where templates are stored in **N:\msoffice**. If you use a different template location, then substitute drive and folder as appropriate.

##### Exercise 5 Saving a template

- Choose **Save As** from the **File** menu
- Click on the downward pointing arrow on the right of the box labelled **Save In**. A *pull down* menu appears.
- Select the **N:** drive by clicking on the line labelled with the drive letter **N:**.
- Select the **MSOffice** folder by clicking on it, then clicking on the **open** button. .
- Type **mytemplate** in the **File Name** box.
- In the **Save File As Type** box choose **Document Template (\*.dot)** from the pull down menu, using the scroll bars at the side of the menu to locate it if necessary.
- Click on **Save**
- Close your document. (There is no need to exit from *Microsoft Word for Windows 2000*)

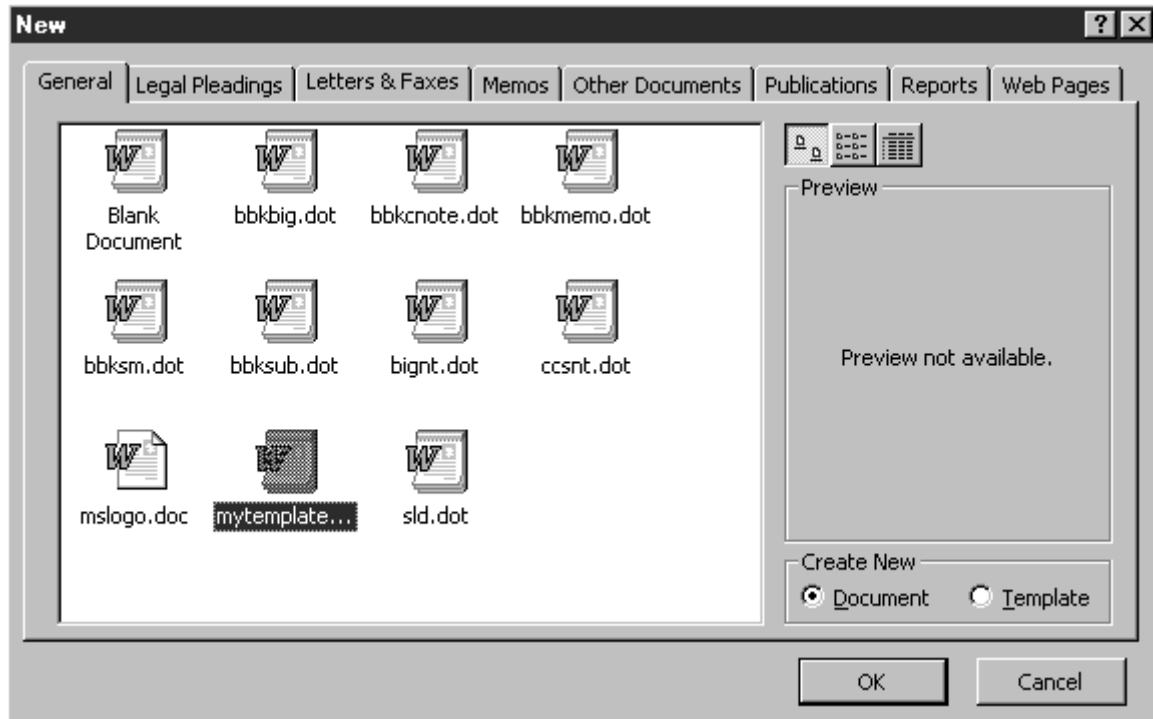
## 5 Using Templates

### 5.1 Creating a document based on a template

When you create a new document using the *new* button on the standard toolbar, *Microsoft Word for Windows 2000* bases the document on the normal template. However, by using the file menu you can use any stored template that has been created by yourself, a colleague, or any of the templates provided with *Microsoft Word for Windows 2000*.

##### Exercise 6 Create a document based on a template

- Choose **New** from the **File** menu.
- Figure 6 shows *my* collection of templates. Yours will be slightly different, but it should now include **mytemplate.dot**. Select **mytemplate** and click on **OK**

**Figure 6 Create a document based on a Template**

## 5.2 Editing a document based on a template

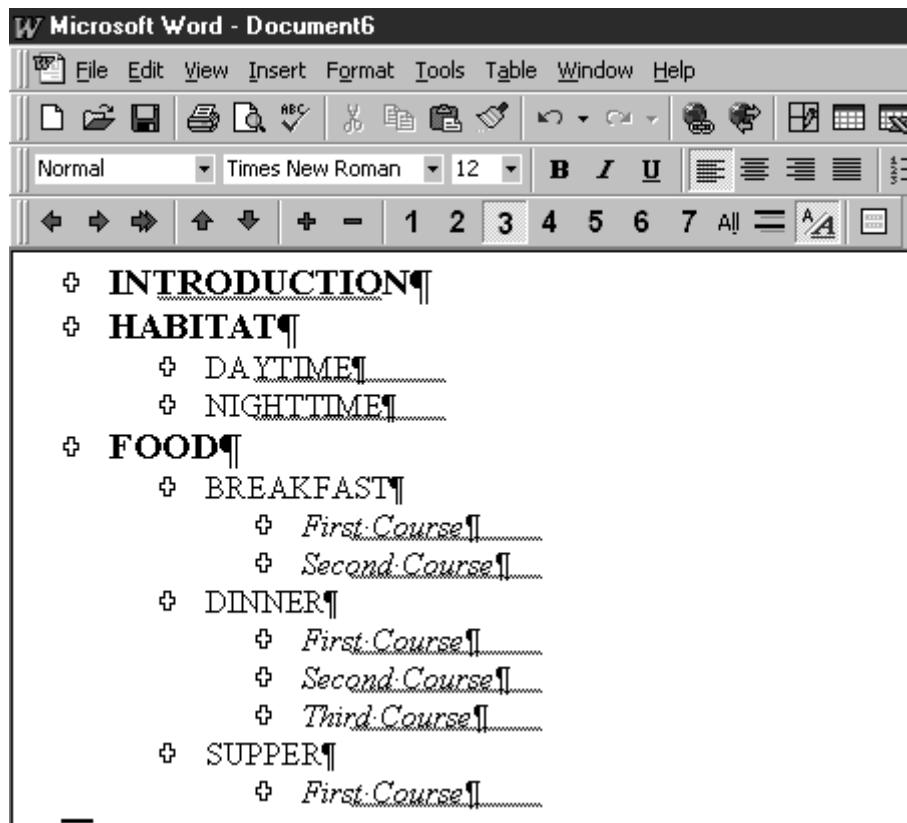
In the next exercise we will use a feature of *Microsoft Word for Windows 2000* called *outline view* to plan our document lay out.

- Heading 1 is the highest level, so when we refer to promoting we mean 'go up a level', e.g. from heading 2 to heading 1. When we refer to demoting we mean 'go down a level'.
- You can use the Promote and Demote buttons on the Outline toolbar to move between levels. (Use Hover Help to locate buttons)
- You can use the Expand and Collapse buttons to hide or show parts of your document. This is useful when you wish to view document structure, rather than content.
- You can type the whole document in outline view, however once you have outlined your document structure, it is usually easier to work in Page view.
- You can use the View menu to switch between document views. There is also a view toolbar in the bottom left corner of the screen. As usual, Hover Help is available to tell you what the buttons mean. However, the buttons are rather small, so you may prefer to use the menu.
- When you remove placeholders from your document you may see the error message 'Error! Bookmark not defined' in the table of contents. Do not worry, as you will need to update the table of contents when you have finalised the document, and this error should disappear.

### Exercise 7 Create an Outline View

- Select the word **Title** and replace it by **The Story of The Three Bears**
- Go to the end of your document and delete the **Heading 1, Heading 2** and **Heading 3** placeholders.
- Choose **Outline** from the **View** menu. An *outline view* toolbar will appear.
- Type the headings and sub headings shown in Figure 7, and save your document. You may find that *Microsoft Word for Windows 2000* is still pointing to the folder that you last used, i.e. your templates folder so check the file location before you save it. On CCS systems you should use **N:\My Documents\bears.doc** You can use short cut keys to select header styles or you can select the style from the drop down menu on the left of the formatting toolbar.

Figure 7 Outline view



### Exercise 8 Add text to your outline

- Switch back to *Print layout* view (on the **View** menu) and, under the headings and subheadings shown, type the text shown below, then save your document again.

#### INTRODUCTION

Once upon a time there were three bears, Mummy Bear, Daddy Bear and Baby Bear.

#### HABITAT

##### DAYTIME

In the daytime they lived in Goldilocks' cottage in the wood

##### NIGHTTIME

At night they tucked themselves up in Goldilocks' bed.

#### FOOD

##### BREAKFAST

*First Course*

Porridge

*Second Course*

More Porridge

##### DINNER

*First Course*

Bread and *Goldilocks' Delicious Honey*

*Second Course*

Porridge

*Third Course*

More Bread


##### SUPPER

*First Course*

Porridge

## 6 Adding an AutoCorrect Entry

It is often useful to abbreviate commonly used words and phrases to reduce the number of keystrokes, and to impose standard formatting. *Microsoft Word for Windows 2000* has an *AutoCorrect* feature. As well as well as correcting a number of common typing errors for you, *Microsoft Word for Windows 2000* allows you to add your own customisations. When you type the abbreviation and then press the space bar, *Microsoft Word for Windows 2000* will substitute the whole phrase, including formatting if you have requested a special format. For example I have set myself an auto correct entry so that when I type 'ww2k' and press the space bar *Microsoft Word for Windows 2000* replaces it with the phrase '*Microsoft Word for Windows 2000*'

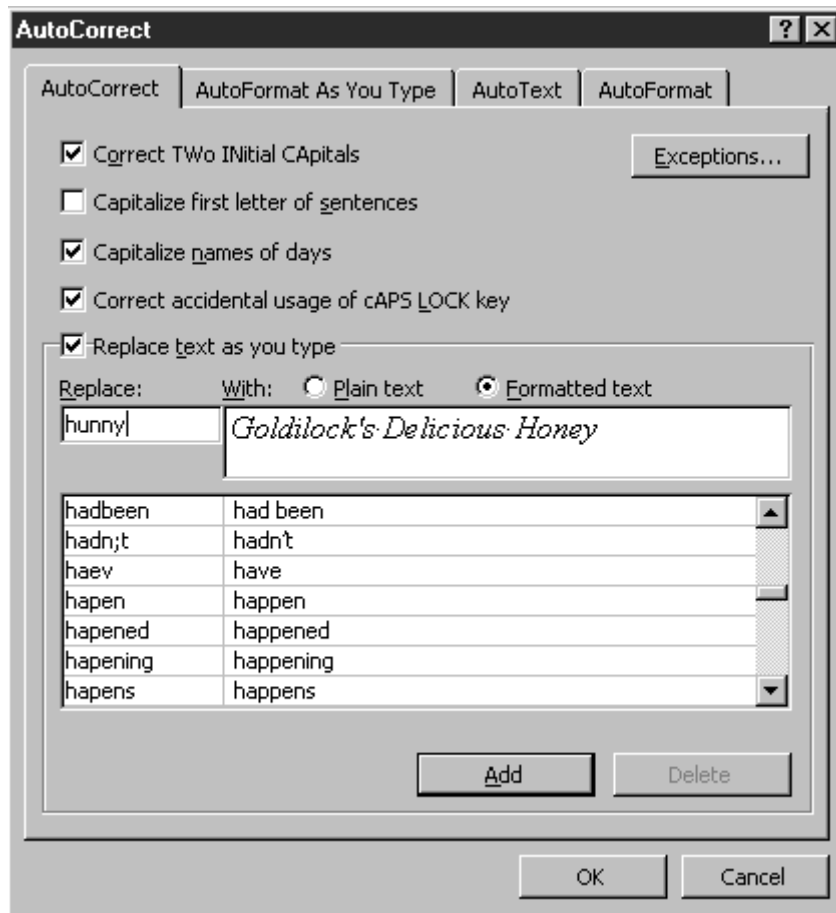
 *When you select a word or phrase using the mouse, Microsoft Word for Windows 2000 may select the space that follows the phrase. When you are using AutoCorrect you do not want to have a space at the end of the phrase because you will need to type a space at the end of your abbreviation to get AutoCorrect to take effect, which would mean you had two spaces. The way*

to avoid this is to use the cursor keys to select only the characters that you want. Position the cursor at the start of the phrase, hold down the **shift** key and move the cursor using the cursor keys on the keyboard to step through the characters. You can also hold down the **CTRL** to step through words.

### Exercise 9 Add an AutoCorrect entry

- Select the phrase 'Goldilocks' Delicious Honey' in your document
- Choose **AutoCorrect** from the **Tools** menu.
- Select the **AutoCorrect** tab. You will see that *Microsoft Word for Windows 2000* has inserted the selected phrase in the **With** box.
- Click in the **Formatted Text** option button. The phrase will be formatted in italics.
- Type **hunny** in the **Replace** box. Your dialogue box should now look like Figure 8

Figure 8 AutoCorrect



- Click on **Add**.
- Before you click on **O.K** to close the dialogue box, you may wish to look at some of the other AutoCorrect entries.

Now add hunny to the second and third courses of dinner. When you press the space bar it should be replaced by *Goldilocks' Delicious Honey*.

## 7 Updating the table of contents

Now that we have completed the document we can automatically update the table of contents so that it includes the new headers and their page numbers.

### Exercise 10 Up date Table of Contents

- Choose **Index and Tables** from the **Insert menu**
- Make sure that the **Table of Contents** tab is selected.
- Choose a format from the list of formats.
- Click on **O.K**
- *Microsoft Word for Windows 2000* will ask if you want to replace the selected table of contents. Click on **O.K**.
- Remember to save your document again now you have changed it.

When you generate tables of contents automatically *Microsoft Word for Windows 2000* adds hyperlinks from the table of contents to the numbered sections. When you convert the document to pdf format using *Adobe Acrobat Writer* the *Adobe* software also takes advantage of this feature. This is very useful in long documents such as the CCS Service Level definition.

### Exercise 11 Follow a hyperlink

- Move the mouse pointer to the table of contents in your document. The pointer changes to a hand.
- Click on **Breakfast** The cursor will move to the **Breakfast** sub heading.

## 8 Automatic Numbering in *Microsoft Word for Windows 2000*

### 8.1 Adding numbers to your section headings

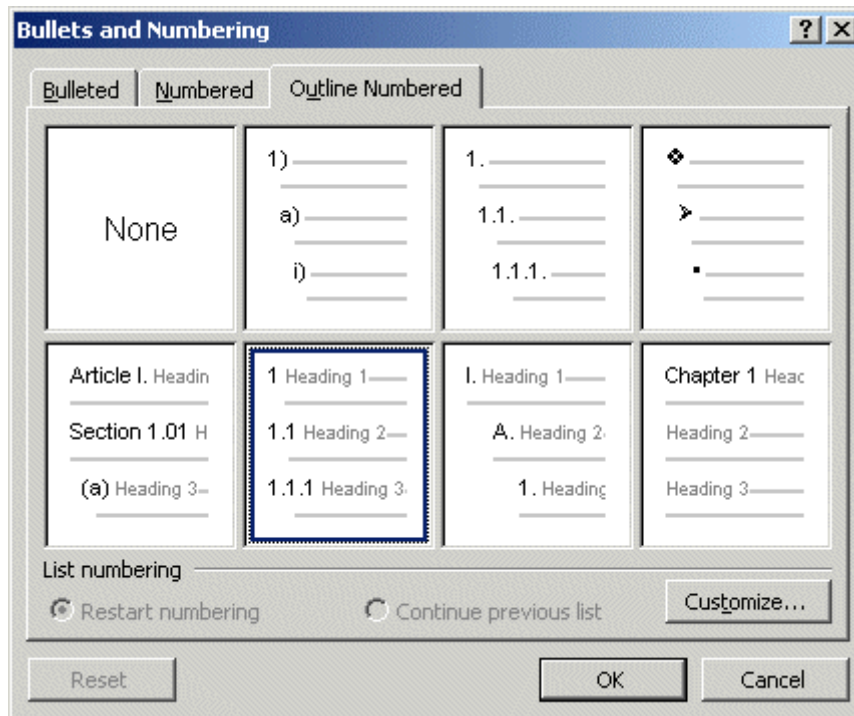
Formal reports frequently contain numbered headings. *Microsoft Word for Windows 2000* can keep track of the heading numbers if you use heading styles.

### Exercise 12 Numbering Section Headings

- Click to position the cursor in front of the word 'Introduction'
- Press **Ctrl + Shift + End** to select all text between 'Introduction' and the end of the document,
- From the **Format** menu select **Bullets and Numbering**
- Make sure the **Outline Numbering** tab is selected. (Click on it if it is not selected).
- Click on one of the outline numbering styles to select it (Figure 9 - see next page).
- Click on **OK**. Your section headings will now be numbered

Now add 'Elevenes' and 'Afternoon tea' as heading 2 style headings under the section on Food. The new headings should be numbered automatically and the other heading 2 style sub-topics will be updated. Update your Table of Contents and you should see the new sub-topics

**Figure 9 Select an outline numbering style**



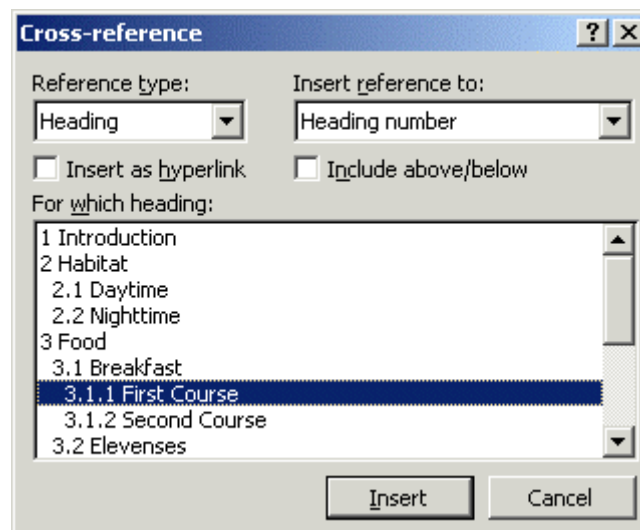
## 8.2 Creating a cross reference

In the next exercise we will insert a cross reference to a section header. If you use other auto-numbering features in *Word for Windows 2000* you can also insert cross references to items such as tables, figures, footnotes & endnotes.

### Exercise 13 Insert a cross reference

- Under the **Elevenes** heading insert a heading for the first course, followed by a new line.
- Type the text 'Please refer to section '
- From the **Insert** menu select **Cross-Reference**
- In the box labelled **Reference Type** choose **Heading** from the drop down menu.
- In the box labelled **Insert Reference To** choose **Heading Number**
- Clear the check box labelled **Insert Hyperlink**
- In the box labelled **For Which Heading?** choose **3.1.1**. The dialogue box should now look like Figure 10, (see page 15)
- Click on **Insert**. Your Elevenes first course should now read 'Please refer to section 3.1.1'



**Figure 10 Insert a cross reference**

### 8.3 Inserting a caption for a table or figure

#### Exercise 14 Insert a caption

- Position the cursor at the end of the document.
- From the **Insert** menu select **Caption**.
- In the dialogue box choose a caption option (e.g. **Figure**) and click on **OK**.
- Type some text in the caption, e.g. **Figure 1 Goldilocks Cottage**.
- Go to the beginning of the document and insert a cross reference to your caption in your introduction. Note that you will have to use the pull down menu of **Reference Types** and choose the one appropriate for your caption (e.g. figure, table).

## 9 Printing a table or figure in landscape format.

Tables & figures are often too wide to fit on a normal (*portrait orientation*) page so we will see how to format the page containing the caption so that it is rotated into *landscape orientation*. If you need to have different page orientations in a document, then you need to divide the document into sections.

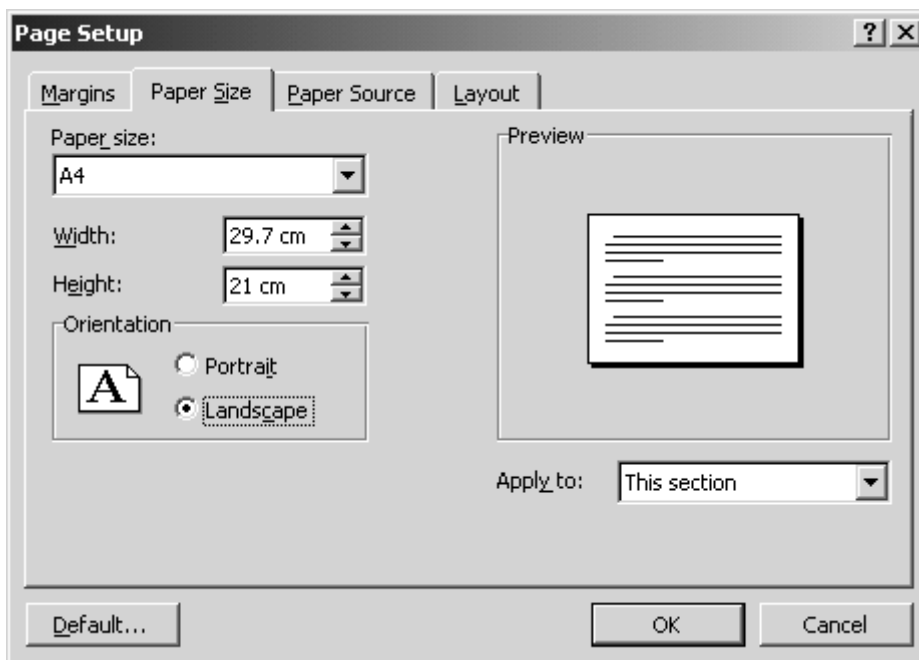
#### Exercise 15 Set page orientation

- Position the cursor in front of the caption that you inserted. If there is other text at the start of the document that you want to print in portrait format then you will need to insert a section break in front of your caption.
- From the **Insert** menu choose **Break**
- In the **Break** dialogue box, under **Section Break**, select the **Next page option box** by clicking on it.
- Click on **O.K.** A section break will appear in your document (see right).
- Position the cursor after the section break

..... Section Break (Next Page) .....

- From the **File** menu choose **Page Setup**.
- Click on the **Paper Size** tab.
- Select **Landscape Orientation** by clicking on the **Landscape** option box.
- Make sure that **Apply to this section** is selected. (If **This Section** is *not* selected then select it from the pull down menu by clicking on the down arrow on the right of the box.). Your **Page Setup** dialogue box should look like Figure 11.
- Click on **O.K**
- If the table or figure is in the middle of your document and you want to revert to portrait orientation after the table or figure then you will need to insert another section break, position the cursor in the new section, and set the page orientation to portrait.
- Save your file again.
- Click on the **Print Preview** button. You will see that there is a landscape page in your document.
- Save & close bears.doc and exit *Microsoft Word for Windows 2000*.

**Figure 11 Page Layout for landscape orientation**



☞ You can use section breaks to format each section in a different way - for example you may want to start renumbering your pages for each new chapter.

## 10 More useful topics

*Microsoft Word for Windows 2000 offers many more powerful features that you can make use of when creating templates. The on-line Help provides step by step instructions on most topics.*

*☞ You can add headers and footers to the pages. By using section breaks you can have different headers and footers in each section, for example, chapters in a book.*

*☞ You can create templates for Microsoft Excel 2000 using the same techniques that you use for Microsoft Word for Windows 2000. Create a spreadsheet with the required layout then save it as a .xlt (template) file.*

*☞ CCS Document 5.105 explains how to insert a graphic. There are guidelines for using the College logo and downloads of corporate fonts on the External Relations web page at <http://staff.bbk.ac.uk/er/index.html> .*

*☞ Please remember to logout when you have finished if you are using a CCS student workstation.*