

# Word: Managing your thesis





# The small print

## Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos. Online videos provided through LinkedIn Learning can be accessed free of charge by University members anytime, anywhere, through a browser or app.

Your course booking will tell you if any prior learning activity is required. If you don't have an environment where you can do this learning, you can come along to one of our LinkedIn Learning sessions. These are a quiet space where you can work through videos or other workshop resources.

If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

## Copyright

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The Wollstonecraft document was sourced from Project Gutenberg and is available in the public domain.

## About the workshop designer

Pamela Stanworth has over a decade's experience working on formal documents, theses and reports with researchers and departments across the University. She brings a pragmatic approach to building documents that are effective, reliable and sustainable.

Pamela's roots are in engineering, working with blue-chip industrial companies, technical consultancy and small businesses. Her commitment in teaching and consulting is to enable people to use appropriate technology in their work, efficiently and to a high standard.

## Revision history

Version	Date	Author	Comments
1.0	September 2016	Stephen Eyre	
2.0	August 2018	Pamela Stanworth	Review exercises
2.1	December 2018	Pamela Stanworth	Updates
3.0	May 2020	Pamela Stanworth	Revise for online
4.0	September 2022	Pamela Stanworth	New courser title
4.1	October 2023	Pamela Stanworth	Reformat

## About this workshop

This workshop gives you an insight into some of the techniques that are available in *Word*, to help you create organized large documents such as a thesis. It will reinforce the key concept of using each tool to its strength and allowing the word processor to organize your work for you according to your goals.

### What you will learn

Using automated tools provided in *Word*, you will learn how to generate key lists that are integral to formal longer documents such as indexes, tables of illustrations and contents. You will see how to apply the popular styles structure to a formal document, with automatic numbering for a hierarchy of headings.

There will be some time to work through prepared exercises or to experiment with your own document.

We will include pointers to other workshops and further resources that will help you go on later to create and manage documents.

### What you need to know

The workshop is designed to work with *Word* as this is commonly used for academic writing at Oxford. Many of the concepts will be transferable to other word processors though and the key concepts are useful whatever word processor is to be used.

I will assume that you are reasonably confident in using *Word* and can:

- Use heading styles
- Understand sections
- Use headers and footers

If you need to review these activities, LinkedIn Learning is a great place to get guidance. There is an activity with relevant videos in the IT Learning Portfolio: visit [skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio) and search for “thesis activity”.

### The resources you need

Sample documents that you can use to experiment with will be made available, but you may like to bring along your own.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit [skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio) and search for “thesis activity”.

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with *Word for Windows* installed.

You can use your own computer with your preferred app installed if you want to – just bear in mind that I am not an expert in every app (although I am sure that between us we will be able to sort out most problems!).

## About the tools you can use

There are many applications that you can use to create a thesis; some make the task easier than others. The best apps are those that allow you to organize your document using automated tools – apart from *Word* here are two other solutions:

### Pages

*Pages* is Apple's word processor and is a good general tool. Doubts about its suitability for academic work persist with early versions unable to cope with portrait and landscape sections in the same document. It has excellent desktop publishing functionality but fewer tools suited for academic publishing.

### Open Office and Office Libre

An open source, cross-platform tool. It has many of the features of *Word* and the interface is clean and user friendly. With patience it can produce documents that match those created in *Word* in terms of layout and typography. Worth exploring, and it exports to .docx files as a matter of course.

## Learning objectives

This workshop has the following learning objectives.

- Learning Objective One – Hierarchical numbering systems
- Learning Objective Two – Footnotes and endnotes
- Learning Objective Three – Cross references
- Learning Objective Four – Table of contents
- Learning Objective Five – Indexes
- Learning Objective Six – Captions
- Learning Objective Seven – Table of Figures

## Learning Objective One – Hierarchical numbering systems

A structured document is more easily managed – and more accessible – if the headings and sub-headings are formatted by applying *Word's* built-in styles Heading1, Heading2, Heading3 etc.

Examine **Welcome questions.docx** to discover which styles have already been applied on various kinds of paragraph. Modify it so that the heading styles include outline numbering – a multi-level number scheme of your choice.

With the insertion point on a Heading1 paragraph, you would click on the drop-down arrow on the Multilevel List button. Here you would choose one of the schemes from the List Library. It is very important to choose one of lists that has heading styles.

Examine the effect on various kind of heading paragraph through the document. Notice that you have redefined the whole family of heading styles to include numbering.




## Learning Objective Two – Footnotes and endnotes

Extra information may be included in a document, out of the main sequence of text, by inserting a footnote or endnote. A small marker (a number or punctuation symbol) is placed in the text, referring the reader to further information at the bottom of the page (a footnote) or at the end of the document (an endnote). *Word* can insert and manage these.

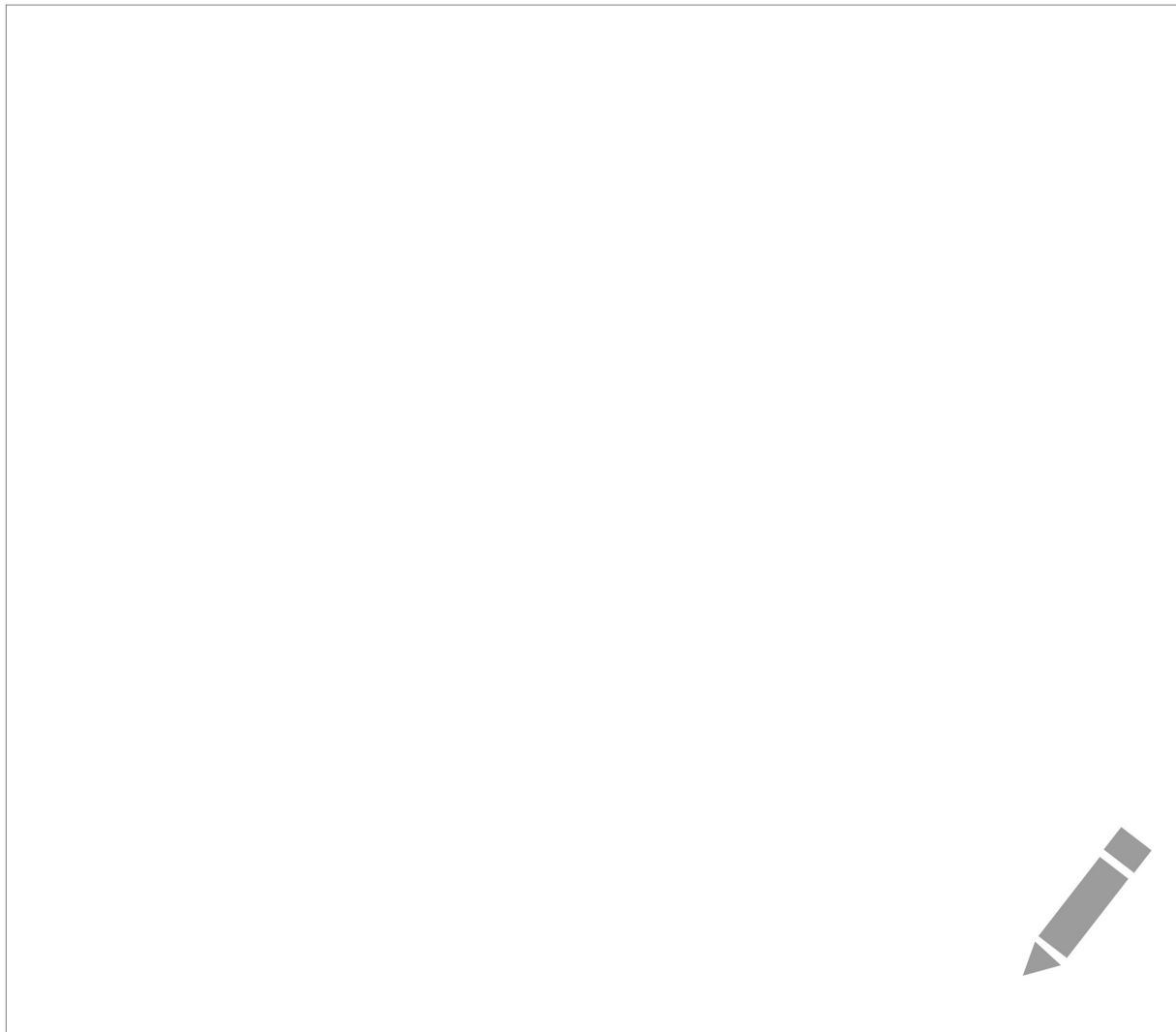
We refer here to footnotes, however endnotes are managed in the same way - just make sure you select **Endnotes** when inserting them.

In **Wollstonecraft.docx**, examine the footnotes that have already been inserted on pages 7 and 8. There are some endnotes on page 9. Insert some more footnotes and endnotes on page 6.

With the insertion point at a suitable place in the main text, choose the **References** tab of the ribbon and choose **Insert Footnote**. Notice the effect on numbering of the existing notes.

For more settings such as numbering format, use the launcher  to open the **Footnote and Endnote** dialog (Mac users who do not have launchers should explore the main menus for equivalent).

Now modify the footnotes to be all written in 12-point text.





### Learning Objective Three – Cross references

In **Draft Handbook.docx**, under “10. Fees”, there are two cross references, one linking to Part 7 and one to Part 9. Use Ctrl+click to test them.

Insert some more cross-references in the text, for example:

illustrated in Figure 4

outlined under “Admission and Registration”

as described on page 15

If the document is to be edited further, the cross-references may then need to be updated.



## Learning Objective Four – Table of contents

It is common to provide a table of contents near the start of a document, giving a list of the chapters or parts with the page where each begins. This would usually be placed after the title page but before the main content begins.

*Word* can build and manage a table of contents in your document, provided that you have already structured the headings and sub-headings using styles. (Using and creating styles is covered in a separate IT Learning Centre course.)

In **Wollstonecraft.docx**, examine the styles that have been applied to the headings. Build a table of contents where indicated on page 2. The Table of Contents dialog is found from **References | Table of Contents**.


On page 12, insert more sub-headings between the paragraphs of Section IV, such as “Sensibility” and “Exclusive Affection”. Format these headings with the style Heading2. Now make sure the two new headings appear in the table of contents.



## Learning Objective Five – Indexes

A formal document may include an index near the end: this may be a list of names, places, or key phrases which are used in the document, with the pages where they are to be found.

*Word* can assemble an index automatically, although you must first go through the document marking the terms and phrases you want included.

In **Draft Handbook.docx**, a number of phrases have already been index marked – you can see the {XE} codes if you turn on  Show/Hide.

On page 6, mark “Graduate Studies Assistant” (para b) and “Trilby Library” (para d) for indexing. Then on page 58 insert an index.

In the text, mark a couple more phrases, then update the index and make sure the new items do appear.



## Learning Objective Six – Captions

A caption can be associated with each figure (or equation, table, photo etc.), with numbering that runs through a document. If this is done using *Word's* automatic captioning tool, then the appropriate style will be applied. These captions are then used to assemble a list of the figures or other captioned items - for example this might be a Table of Figures, commonly included near the Contents of a document.

In **Draft Handbook.docx**, some of the graphics already have captions. Examine the captions, noticing the style used automatically.

For the first image in part 19 (Computing Services), insert a caption “Study tools”, by selecting the figure (or table, photo and so on) and using **Insert Caption**, on the **References** tab of the ribbon. Insert captions for some more figures that need them.

Check the effect on the existing figure numbers – update figure numbers as necessary.



## Learning Objective Seven – Table of Figures

Near the beginning of the **Draft Handbook.docx** document, create a list of the figures, giving figure numbers and page numbers. Use the hyperlinks in the table of figures to move around the document, visiting each graphic in turn.



## Further information

### Getting extra help

#### Course Clinics

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice. Contact us using [courses@ox.ac.uk](mailto:courses@ox.ac.uk).

#### Study Videos from LinkedIn Learning

On our website, you will find our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit [skills.it.ox.ac.uk/linkedin-learning](https://skills.it.ox.ac.uk/linkedin-learning) and sign in with your Single Sign-On (SSO) credentials.

Some courses recommend pre- and/or post-course activities to support your learning. You can watch the online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

#### About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at [skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio).

Find the pre-course activity for this course in the IT Learning Portfolio: visit [skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio) and search for “thesis activity”.

#### About the IT Learning Centre

The IT Learning Centre delivers a programme of digital skills courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through LinkedIn Learning.

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver closed courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at [courses@it.ox.ac.uk](mailto:courses@it.ox.ac.uk).

#### About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.


The Customer Services Group also offers a data back-up service. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

## Course Slides

The following pages contain images of the slides used in the presentation. The original PowerPoint presentation file can be downloaded from the same place where you obtained this course book.


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Word:  
Thesis and book design

Pamela Stanworth  
pamela.stanworth@it.ox.ac.uk



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### Resources for your learning

Activities for you to practice today  
In the coursebook  
Work at your own pace!  
Be selective

Videos with today's topics in [LinkedIn Learning](#)

Follow-up work  
Continue with exercises after the session  
Bookable Course Clinics later



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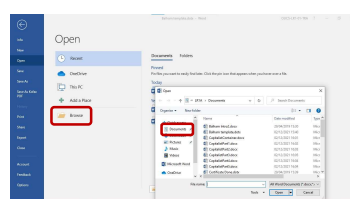
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Today, the exercise files are in the **Documents** folder



Word 2019 in teaching rooms

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Course topics	
<b>Part 1</b>	<b>Part 2</b>
Automatic numbering	How templates work
Footnotes & endnotes	Create or modify templates
Cross references	
Index and table of contents	Making up a book
Figures and captions	Re-structuring a large document

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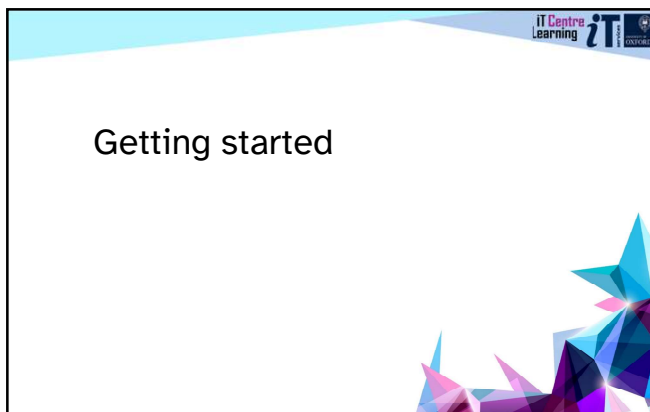
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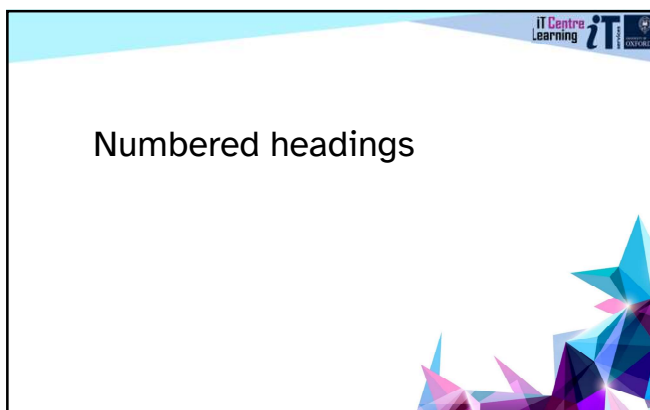
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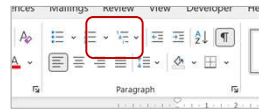
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## Multi-level numbering - direct format -

Button on the **Home** tab  
Choose a number scheme



Promote and demote individual paragraphs  
using 

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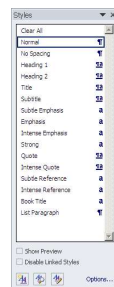
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## Applying a style

Select/click in the text  
Display the **Styles** task pane

Choose a heading style

Text is re-formatted  
All text with that style  
will have the same formatting



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
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## Numbered headings using styles

Click in a paragraph that has **heading1** style already  
Click 

Choose a numbering scheme  
with "heading" in the preview

All heading styles are re-defined  
to use this numbering scheme



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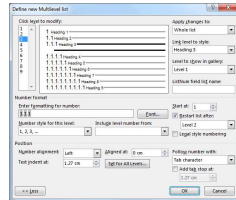
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## Customise the numbering pattern

On the **Multilevel List** menu  
Choose **Define New Multilevel List**



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## Word: Managing your thesis

Look at Learning Objective One

Resume at 10:15 please

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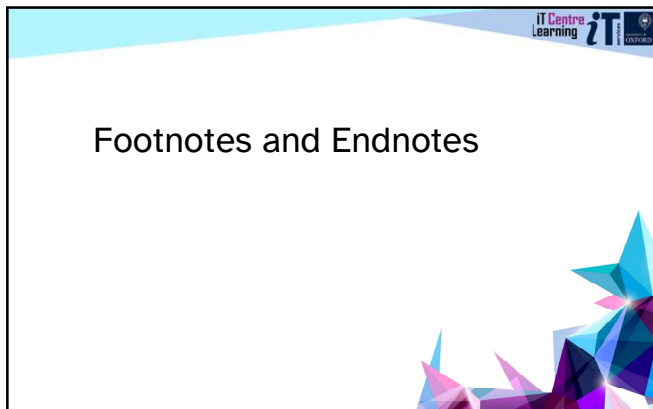
## Find the resources for this workshop in our IT Learning Portfolio

Download the files  
(and more) from the  
IT Learning Portfolio at

[skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio)



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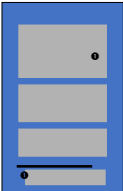
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### Footnotes and endnotes

Footnotes - at the foot of the page

Endnotes - at the end of a document (or section)



There is special software for creating bibliographies and reference lists (eg. *EndNote*)

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### Creating footnotes and endnotes

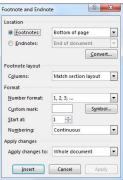
AB<sup>1</sup> Insert Footnote

Insert Endnote on the **References** tab

Choice of numbering scheme or symbols

Continuous numbering

or Restart on each page (or section)



Use the reference symbols to browse

Numbers re-count when text is rearranged

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## Footnotes and endnotes use styles

### Symbol and note text use built-in styles

Footnote text, Footnote reference

Endnote text, Endnote reference

### Modify a style to suit your document

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## Cross-references

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## Cross-references

### Pointing to a place elsewhere in the document

"as explained in the Conclusions"

Although prior solutions to this problem are satisfactory, none have taken the robust method we propose in our research. Two properties make this approach (2023) our framework is derived from the replication of network programming, and also our system constructs the clients.

We question the need for real-time methods (2023) seem unexpected, it has single historical precedents. Despite the fact that conventional systems (2023) are described in Figure 4, addressed by the system of Figure 4, we believe that a different approach is (2023). The basic level of the solution is the simulation of the internet. We emphasize that Tang may be able to be visualized to store the refinement of Markov models. Combined with knowledge-based algorithms, such a claim refines new concurrent theory.

"as defined in Equation VI"

"as described in Part 4"

"details given in Table 16 below"

Cross-reference can point to a heading, bookmark, footnote, endnote, equation, figure, table, title ...

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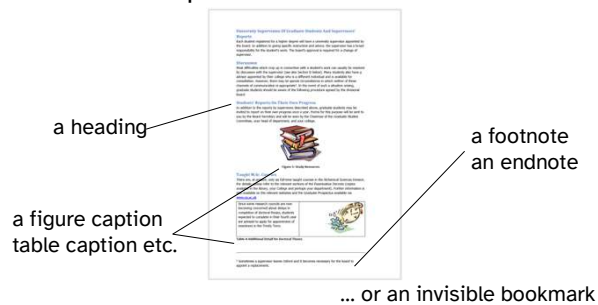
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## Cross-ref can point to...



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## Cross-referencing

A cross-ref is a field code

Update often



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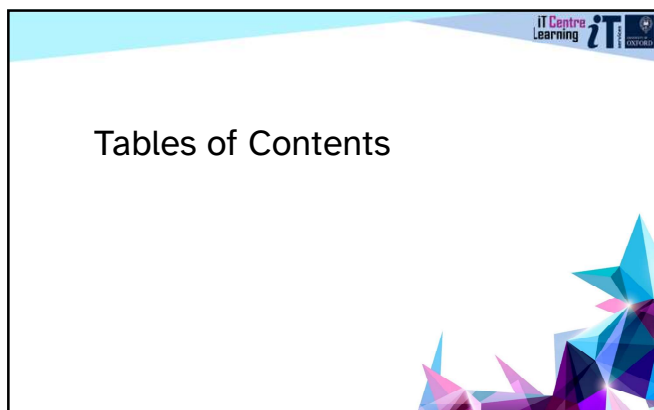
## Word: Managing your thesis

Look at Learning Objectives Two and Three

And take a break...

Resume at 11:00 please

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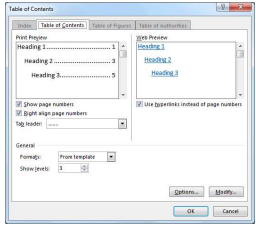
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**Table of Contents**

**References |** 

**Choose:**

- Showing page numbers
- Right-aligning
- Tab leader
- Format
- Levels to include



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

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**Table of Contents options**

Choose which styles are to build the ToC      Re-define the styles used to display the ToC

**Navigating**  
<Ctrl>+click to jump to a heading

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## Field codes

*Word* uses field codes for automatic features  
e.g. Table of Contents, Index, Cross-reference  
*EndNote* uses field codes for citations and bibliography

Updating  or  or <F9>  
Not automatic!

<Alt+F9> Show all field codes  
<Ctrl+Shift+F9> Replace a field code with its  
result (ready for publisher)

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## Index

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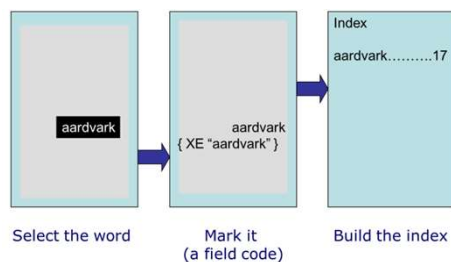
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## Indexing



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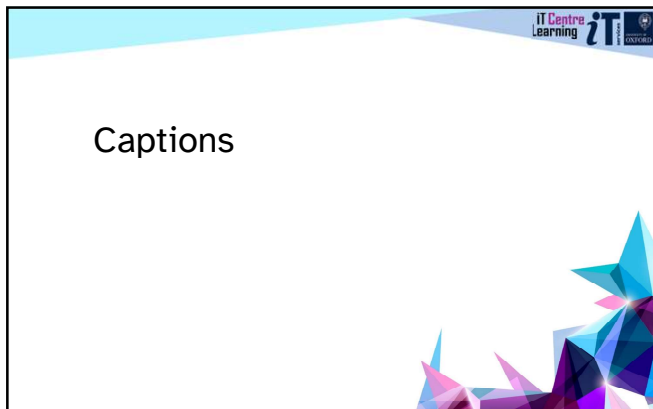
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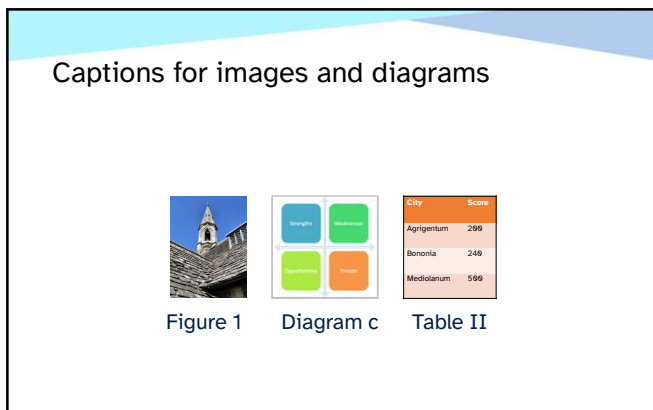
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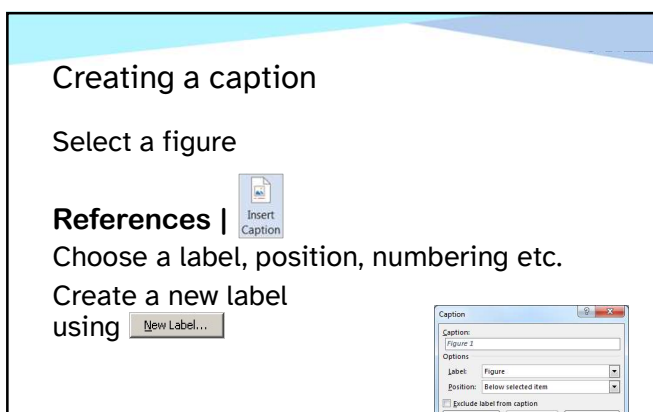
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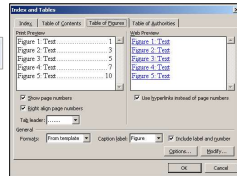
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## Table of Figures

Lists can be based automatically on captions

Separate lists for Figures, Tables, Maps etc.

### References | Insert Table of Figures



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## More help with documents

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## Other related courses

**Word:** Good practice in document design  
Building your long documents

**EndNote** referencing series

See the schedule online

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Find the resources for this workshop  
in our IT Learning Portfolio

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(and more) from the  
IT Learning Portfolio at

[skills.it.ox.ac.uk/it-learning-portfolio](https://skills.it.ox.ac.uk/it-learning-portfolio)



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Word: Managing your thesis

Choose from the remaining Learning  
Objectives

Finish at 12:00 please

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[pamela.stanworth@it.ox.ac.uk](mailto:pamela.stanworth@it.ox.ac.uk)



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