

## FORMATTING THESES AND DISSERTATIONS IN MICROSOFT WORD

Microsoft Word has some features that facilitate formatting of theses and dissertations. This help sheet outlines features and instructions for using Word to format your thesis or dissertation according to the College of Graduate Studies' *Format and Style Guidelines* ([http://monitor.utoledo.edu/depts/grad/pdf/green\\_book.pdf](http://monitor.utoledo.edu/depts/grad/pdf/green_book.pdf))

### Margins

The *Format and Style Guidelines* require that the left margin be 1.5", with the remaining three margins at 1". Nothing, not even page numbers, may be in the margins, so this may require changing the default margins. First, decide if your page numbers are going to be in the upper right-hand corner (in the header) or centered at the bottom (in the footer).

In Word, go to **File menu > Page Setup...** option. On the **Margin** tab, enter these settings:

Page number location:	Upper right-hand corner	Bottom center
Top	1.5"	1"
Left	1.5"	1.5"
Bottom	1"	1.5"
Right	1"	1"

Then, on the **Layout** tab, under **From Edge...**

Page number location:	Upper right-hand corner	Bottom center
Header	1"	0.5"
Footer	0.5"	1"

Under **Preview**, select **Apply to Whole Document**. (This will set the margins the same for all pages in your thesis/dissertation.) Then click on **OK**.

### Page Numbering

Having Word do the page numbering is a little tricky because the preliminary pages use lowercase Roman numerals (i, ii, iii, iv...), while the body of the document uses Arabic numerals (1, 2, 3, 4...); and the title page has no page number at all, though it is actually page i.

#### *Inserting the page number in the right place*

Do NOT use **Insert > Page numbers...** because that inserts the page number in a textbox. Instead, use **View menu > Header and Footer**.

If your page numbers are going to be in the upper right hand corner, click the right align button on the formatting toolbar, then click on the **Page Number** button on the **Header and Footer** toolbar. (The page number button looks like a page with a pound sign on it [#].)

If your page numbers are going to be centered in the footer, click on the **Switch Between header and Footer** button on the **Header and Footer** toolbar. (The button looks like a white page with yellow boxes at both the top and the bottom of the page.) Then click on the center align button on the formatting toolbar, then click on the page number button on the **Header and Footer** toolbar. (The page number button looks like a page with a pound sign on it [#].)



### ***The switch from Roman numerals and Arabic numerals***

In order for Word to handle two kinds of page numbering, we have to insert a section break between the preliminary material and the body of the document.

1) At the end of the last page of the preliminary material (last page that will use Roman numerals), insert a section next page break: **Insert menu > Break... > Next Page** (under **Section Break Types**). This tells Word where to change numbering schemes.

2) On the last page of the preface material, view the header and format the page number: **View menu > Header and Footer**. Click on the **Switch between Header and Footer** button, if needed, then click on the **Format Page Number** button (looks like a page, with a pound sign and a hand). Select number format: i, ii, iii,... and have it start at 1 (which should be the default option). Click on **OK**, then click on **Close**.

3) Move to the body of the project, view the header/footer and format the page number: See instructions under step 2 above, but select 1, 2, 3, .... as the number format. Make sure that it also starts with 1; do NOT have it continue numbering. Click on **OK**, then click on **Close**.

If it is not working, view the header on the second page. If the Same as Previous button (looks like to pages with yellow footer boxes) is active, click it to turn it off.

### ***Removing the page number from the title page***

Click on the title page. From **File menu > Page Setup... > Layout** tab, under **Headers and Footers**, select **Different First Page**. Under **Preview**, select **This section** from **Apply to**, then click **OK**.

### **Table of Contents**

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Word can also create nice looking table of contents. When creating the table of contents, begin with the first line in your table of contents. Select **Format menu > Tabs**. Enter **6"** for the tab stop position (that is appropriate for the project margins), for alignment, select **Right**, and for leader, select **2...** Click on **Set**, then **OK**. Type the chapter title, then hit the tab key. The cursor should jump to the far right side of the screen with a row of periods. Enter the page number, hit the enter key, and continue the next line.

NOTE: Do not try this by just entering periods from the keyboard. The right edge will usually end up being raggedy. Using the tab will create a nicely justified table of contents.

There is also an automatic table of contents feature in Word, but it requires fiddling with the text styles, which is usually more trouble than it is worth.

### **Miscellaneous Word Features**

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These are probably features with which you are already familiar, but just in case:

**Double spacing:** **Format menu > Paragraph...** Under **Spacing**, change **Line Spacing**

**First-line indent:** **Format menu > Paragraph...** Under **Indentation**, change **Special**

**Widow/orphan control:** **Format menu > Paragraph....** On **Line and Page Breaks** tab, under **Pagination**

**Line numbering:** **File menu > Page setup...** On **Layout** tab, click on **Line numbers** and select desired options. To see line numbering, you must view the document in print layout view. Line numbering **MUST BE TURNED OFF** before submitting the final copy of the document to the College of Graduate Studies.

## Using EndNote to Format References

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EndNote, in conjunction with Microsoft Word, is used to format references in theses and dissertations. There are instructional materials for EndNote on the Library's web page (<http://www.utoledo.edu/library/mulford/education/bibmgmt.html>), and the librarians at the Mulford Library can show you how to use EndNote for your thesis or dissertation (see <http://www.utoledo.edu/library/mulford/resources.html> to request an appointment with a librarian). Here is some other important information about using EndNote:

- Contact the Mulford Health Science Library (419.383.4218 or [mulfordreference@utoledo.edu](mailto:mulfordreference@utoledo.edu)) for the EndNote output style approved for theses and dissertations. (Note: some programs use other styles, such as APA or AMA formats. There are also EndNote styles for them. Contact Mulford Reference Assistance for more information.)
- It is very important that information be entered into EndNote is entered in the proper manner. EndNote is fast, but it is not smart. It can only do what it is told to do with the data that it has. If the information (like author names or journal title) is incorrect, the formatted references will be incorrect. For information on entering proper data format, see online help or the EndNote Basic Skills help sheet, available online at <http://www.utoledo.edu/library/mulford/education/bibmgmt.html>

## Notes

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