

## *GH Editorial Guide #1*

# Tips for formatting your Word documents

Do you use Microsoft Word to write reports, articles, newsletters, book manuscripts, or anything else that needs to have a professional look about it?

Maybe you've got into the habit of just typing away as soon as you've created a document, without thinking much about how it's formatted. Maybe you use the default Normal style for everything, and just make your headings bold.

It's tempting to work that way, especially if you're keen or in a hurry. There are better ways, though.

If you make sure the formatting is **consistent**, this will help your readers to focus on what you've written, without being distracted by variations in its appearance.

If you make sure the formatting is **logical** and the different types of elements can easily be distinguished from each other, this will

help them to understand how the content is organised, and to find their way around it.

And if an editor is going to check the document, good formatting will help the editing process to go smoothly. The editor will be able to concentrate on the wording, rather than having to spend much of their time working out how it should be formatted. There are other advantages as well, which will be explained later in these pages.

This guide will help you through the basics of how to create a document with a professional 'look and feel' – using Word's main formatting functions, along with styles and templates.

If you've been asked to write your document using an existing template, this guide isn't really aimed at you, although you still might find some useful tips here.

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**Please note:** The detailed advice and screenshots in this guide are based on the Office 365 Business version of Word at the time of writing (Version 1905), running on Windows 10. Some details might be different in your installation, but hopefully not enough to make my suggestions difficult to follow.

## Using styles

The key to well-organised formatting is to use Word styles for *everything* in your document.

This is a reliable, efficient way to keep your formatting consistent, and to make sure the reader can tell the different types of text apart from each other.

It also makes your life easier. If you change your mind about how you want to format a type of element, you'll only need to adjust the definition of the relevant style, and the changes will be applied globally straight away.

### Types of style

You'll need to understand the distinction between *paragraph* and *character* styles.

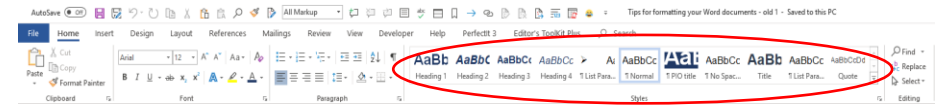
**Paragraph styles** are the type that you're more likely to find useful. They define paragraph-level features of the text such as indentation, alignment and vertical spacing. They also have character-level attributes such as bold, italic and text colour – but you'll need to be careful with these, making sure they're applied the way you want them to be (see the note under Creating, changing and applying styles).

**Character styles** only define those features that are relevant to characters (bold etc.) rather than to a whole paragraph.

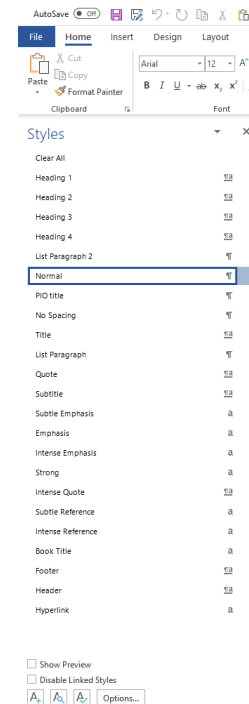
There are also **linked styles** – these can be used at either paragraph or character level, depending on whether you've selected a whole paragraph or just some characters within one.

### Accessing the styles

If the Home tab is open, you'll see the *Style Gallery* towards the right of the toolbar, showing some of the styles available:



To see *all* of them, click on the arrow to the bottom right of the Style Gallery, and the *Style Pane* will appear at the side:



Here, paragraph styles are marked with the '¶' symbol, character styles with 'a', and linked styles with '¶a'. Each one has a drop-down menu available, including a *Modify* option.

You can control the order in which styles appear in the Style Gallery using the *Manage Styles* option, available via a button at the bottom of the Style Pane, as explained [here](#).

### **Creating, changing and applying styles**


You can find good [advice](#) about this on the Microsoft support site.

When applying styles, be aware of how paragraph and character styles work differently:

- If you select one or more complete paragraphs and apply a paragraph style, this won't change any character-level features of the text. For example, if a word is in italics, it will stay in italics regardless of how that style is defined.
- However, if you only select *part of* a paragraph and apply a paragraph style, Word *will* make sure all the selected characters follow that style – this might not always be what you're hoping for.

### **When you're done ...**

When you've finished writing, it's worth checking that every piece of text – every heading, paragraph and so on – is in a suitable style. You could do this by just moving your cursor down, heading by heading and paragraph by paragraph, and checking that the right styles are framed in the Style Gallery or

Style Pane. For a bit more detail and clarity, though, you might prefer to use the *Style Inspector*, available via the  button.

To keep your formatting consistent between documents, you can create *templates* (see Using templates).

## Types of content

For a fairly straightforward report, article or other document, the main elements you'll need to think about are the normal text (at both character and paragraph levels) and headings.

A more technical or academic document might also have features such as formulas, equations, captions, notes and references.

Other elements also might come into play: lists, displayed quotations and table text, for example.

### Characters

Choose a font type that is easy on the eye and makes everything clear. Make sure the text is large enough to be read comfortably. If the document is likely to be read on computer screens, don't force the reader to lean forward or zoom in.

If you want to use things like bold, italics and different colours, only do this sparingly, otherwise they can become a distraction. If anything is underlined, especially on a web page or in a digital document, readers might think there's a hyperlink – so it's best to avoid underlining unless there actually is one.

Remember that character-level features (bold etc.) can be defined in both character and paragraph styles.

## Paragraphs

Think about which paragraph layout you want to use. There are two basic formats:

- *Indented* – the first line of each paragraph (except, usually, the first one after a heading) is indented from the left margin.
- *Spaced* – there's more vertical space between paragraphs than between lines in a paragraph (as in this guide).

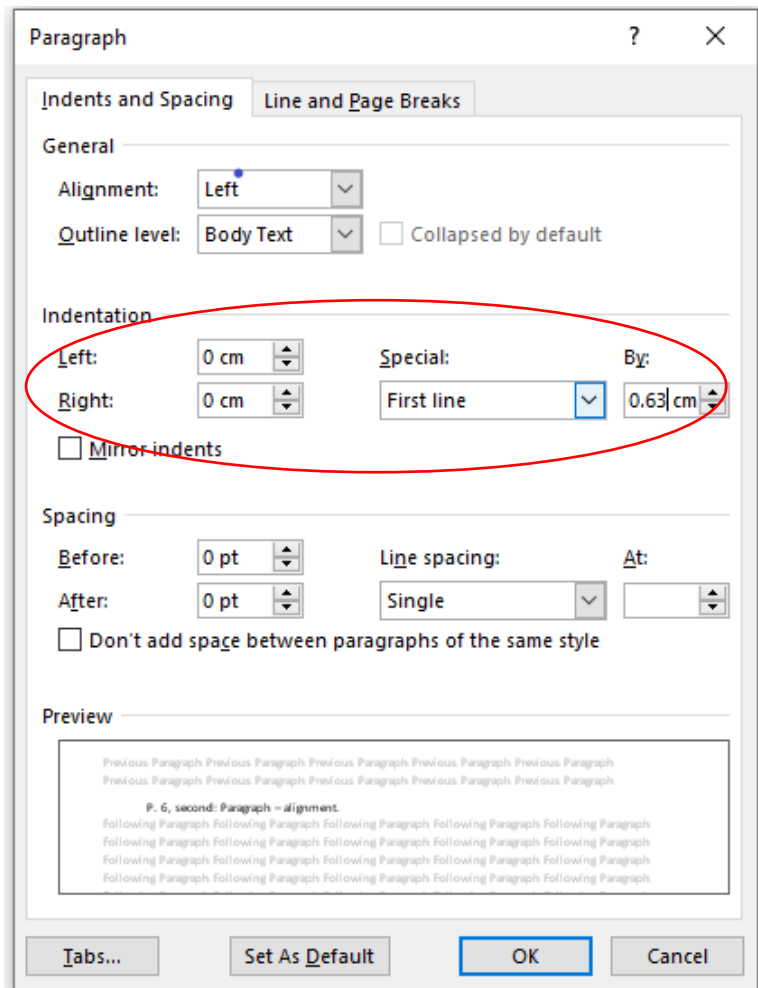
Indented paragraphing is generally better for longer items such as books and newspapers, whereas spacing is preferable for things such as web pages and reports. There's no need to use both methods together – that would be overkill.

Whichever layout you choose, *don't* apply it manually, by using the Tab key (or, even worse, a string of spaces) for indentation, or hitting the Return key for a spaced layout.

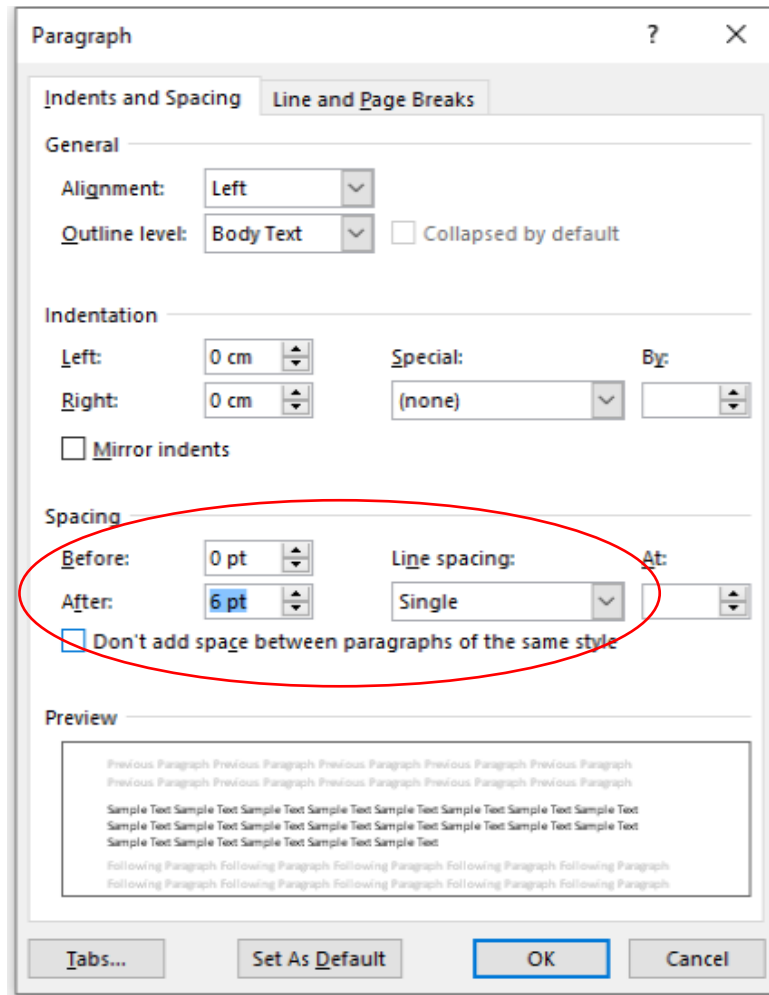
Instead, make use of Word's *Paragraph* formatting functions. That way, once you've defined your settings, Word will do the work for you, and you can make sure the degree of indentation or spacing will be consistent and just how you want it.

To do this, open the *Paragraph* dialogue box and ensure that the *Indents and Spacing* tab is showing.

Then, for **indented** paragraphs, use the *Indentation* options as below, with 'First line' indicating that only the first line of each paragraph is to be indented:

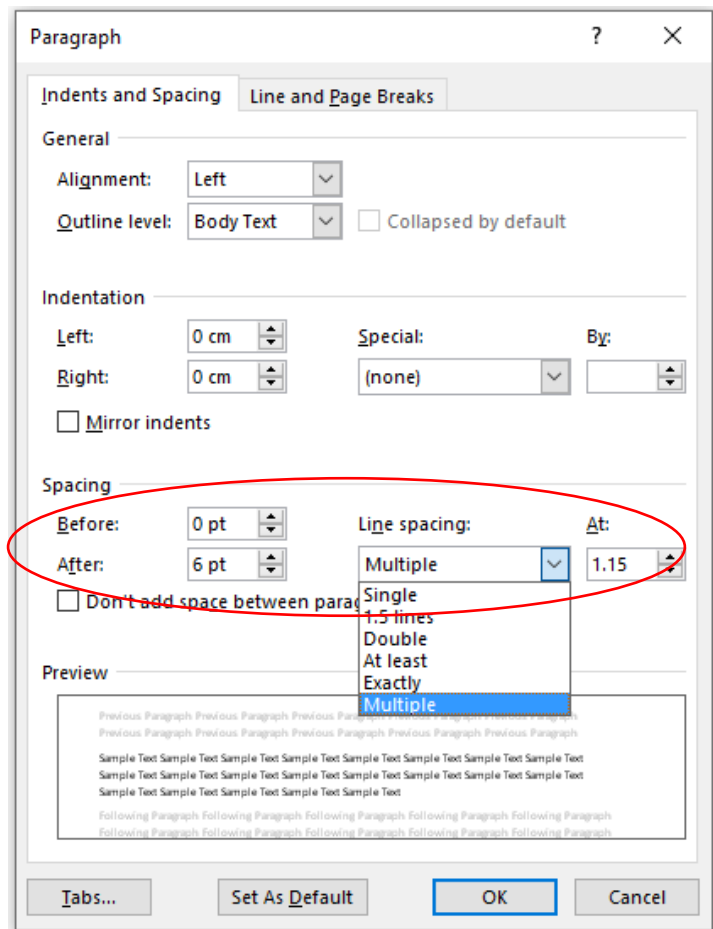


For **spaced** paragraphs, instead of using the *Indentation* options, fill in the *Spacing* options with details such as those below:



If you don't want the first paragraph *after each heading* to have its first line indented, you could create another style, where *Special* is specified as '(none)' rather than 'First line'.

To put more space between lines *within a paragraph*, use something other than ‘Single’ for *Line spacing*, and, if needed, specify more detail under *At*:

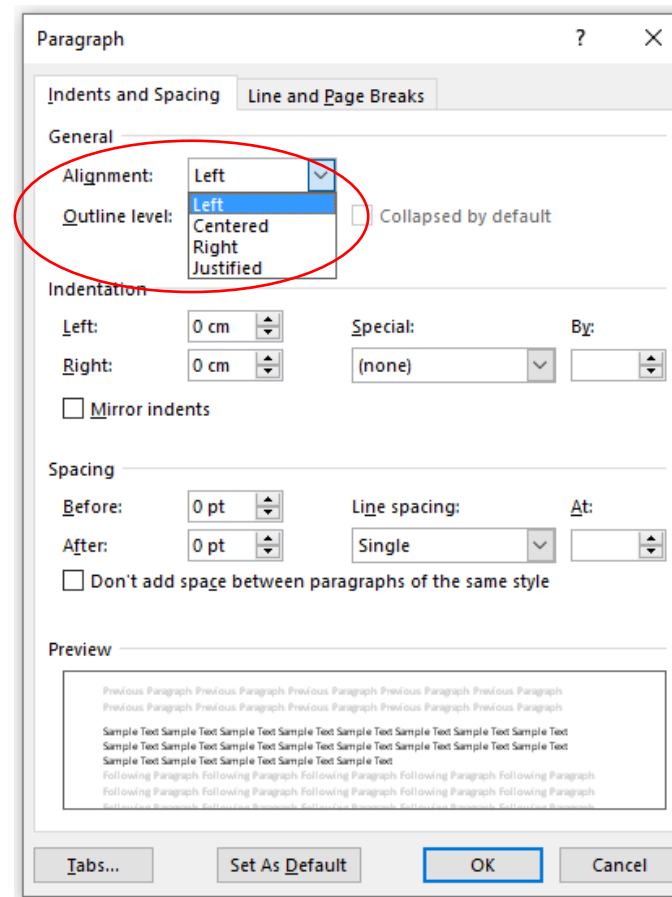


Also think about the horizontal *alignment* of the text. In books and newspapers, it’s usually fully justified: in other words, every line goes all the way to the right margin (except for the last line in a paragraph, unless it happens to be long enough to reach

that far). This gives the text a neat appearance, but can lead to ‘gappy’ lines, with much more horizontal spacing than others.

It’s often better to align the text on the left only, as in this guide, especially if your paragraphs are generally short.

You can specify your chosen alignment in the *Paragraph* dialogue box, as below. The ‘Left’ option will align the text on the left side only; ‘Justified’ will align it on both sides.



All of these settings are also available on the *Home* toolbar, just above the *Paragraph* label.

When you've decided on your paragraph settings, create a style (or modify an existing one) to define them, perhaps with an additional style for paragraphs that immediately follow headings, as mentioned earlier.

Please also see the advice under Page layout.

## Headings

Headings play a key role in helping the reader to find their way through the text. They clarify how the content is structured, and help guide the reader if they're looking for something specific.

If you're using more than one level of headings, it's especially important to make sure each level has a consistent format that's clearly different from those of other levels. You can do this by using features such as:

- font size
- bold
- italic
- colours
- use of capitals
- having a line underneath (and possibly one above)
- centred versus left-aligned
- new page before the heading.

Generally, the higher-level headings should have attributes that make them bigger or more striking than the lower-level ones. You don't need to use many of these features, though: just one or two should be enough.

Make sure each heading has a good degree of separation from the preceding text, and, usually, from the following text. In some cases, it might be suitable for a low-level heading to be very close to the text below it – but not if that text has multiple paragraphs with spacing between them.

As well as helping to ensure consistency, the use of styles for your headings will allow you to create a list of them in the *Navigation Pane* (hit Ctrl + F and select the *Headings* tab; or go to the *View* toolbar and tick *Navigation Pane*), and to create a contents list by using the *Table of Contents* function.

## Lists

These can be bulleted or numbered. The 'numbered' format might actually involve letters (upper or lower case) rather than actual numbers. Roman numerals (again, upper or lower case) are another option.

As a general rule, numbers or letters are useful if the sequence of the listed items is especially important (for example, in a series of instructions) or if they're referred to elsewhere. Otherwise, they would just be an unnecessary distraction, and it's better to use bullets.

Either way, make sure you use a consistent style, except where there's a good reason to vary things – for example, if you're using multi-level lists. Always use:



- the same type of bullet, or the same style of numbers or letters (including the decision on whether to use a full stop, a bracket or neither)
- the same amount of indentation, both before and after the bullet, number or letter
- the same spacing above and below items.

Word has a pre-defined style called *List Paragraph*. By default, this is automatically applied when you use one of the list functions. If you'd rather use the Normal style, go to Options → Advanced and tick 'Use Normal style for bulleted or normal lists'. Or, you can create your own style for lists, and apply it manually after creating each list.

### ***Captions and table headings***

If you're going to include things such as pictures or diagrams, it usually makes sense to label them (so that the main text can refer to them clearly) and write captions for them (so they will mean something to the reader).

Make sure these captions look different from your normal text. You might choose to centre them (using the *Alignment* function in the *Paragraph* dialogue box), also making sure they're indented further from the margin than the main text is.

Similarly, you might want to use headings for tables, also with a distinctive format.

### ***Footnotes, endnotes and references***

Footnotes and endnotes also should look reasonably different from normal text, so that the reader can instantly see what they are.

For references or bibliography entries, it usually makes sense to use a special type of paragraph layout. For example, you might choose to indent all lines except for the first one (which is the opposite of a normal indented paragraph format), so that the author's name will stand out as the reader scans the list. Or you could use spacing to clearly separate the entries, with no indentation at all.

### ***Displayed quotations***

If you want a quotation to stand out from the rest of the text, or if it's long and you think some separation would be useful, you can *display* it by putting it into a separate paragraph with distinctive formatting. As with captions, this might mean using extra indentation on both the left and right – although centred alignment is best avoided.



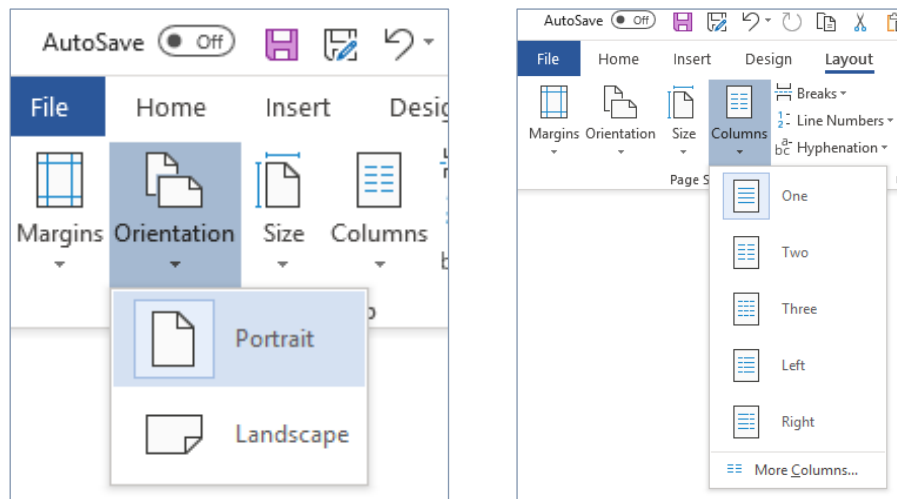
## Other things to consider

### Page layout

The default type of orientation, *portrait* layout, might seem like the obvious choice. But if your content is more likely to be read on a computer screen than on paper, *landscape* layout will help your readers to see more of it at a time, with less scrolling needed.

Also, especially if you use landscape orientation, consider splitting the text into *columns* – as I've done in this guide – so that the reader won't have to keep scanning all the way across the screen.

To control these features of the document – or of just a part of it – select the *Layout* tab at the top of the screen, and you'll then find the *Orientation* and *Columns* options:



If you apply these settings to just a selected part of your document, Word will automatically divide it into sections, each with its own page layout details.

### Page headings and footers

Although your document might mean a lot to you, and you might have slaved away at it over many hours, for your reader it may well be just one of many things they will read that day.

To help them remember what it is and where it came from, consider using a page *header*, with its title and something to identify who has provided it.

A page *footer* can be useful as well, especially if it includes the page number. You might also think of other small items of information that are worth including in the header or footer.

To fill in the header and/or footer, choose the *Insert* tab (even if you're actually going to change what's already there, rather than inserting a header or footer). The *Header* and *Footer* functions will then appear in the toolbar. If you select one of these, the header or footer will become editable.

To add a page number to the header or footer, use the *Page Number* function on the *Insert* toolbar. You can add other variable items, such as the file name, by using the *Quick Parts* function – also on the *Insert* toolbar – and then selecting *Field* from the drop-down menu.

## Using templates

If you're likely to create a number of documents in the same style, consider setting up a *template* that defines your styles and page layout settings.

A Word template is a type of file – Microsoft Word Macro-Enabled Template (with the suffix '.dotm') – that exists only for the purpose of creating documents with pre-defined features such as these.

If you 'open' a template file, the document that you'll then see in Word isn't the template itself: it's a Word document that has been created automatically, with the same settings and styles as the template.

If you change any of these details in the new document and want to apply these changes to the template, there are two ways to do this:

- For styles only: after changing the style details in the *Modify Style* dialogue box, tick the 'New documents based on this template' option.
- Use the *Save As* function. In the *Save as type* drop-down list, choose 'Word Macro-Enabled Template'. Navigate to the location of the existing template, select it, and choose the option of replacing it when prompted.

As an alternative to using templates, you could create a new document by simply 'cloning' an existing one that has the styles and settings you need, and then changing the content as required.

## Closing thoughts

I hope you're now convinced that taking good care of formatting – and especially using Word styles – will help you to produce documents that are more professional, consistent, readable, and useful to your target readers.

I also hope you'll agree that the extra effort is worth it in the end. It will need some work up-front, but that might well be offset by the time that will be saved later on, at stages when you and/or your editor might otherwise face the daunting, frustrating task of making sure everything is formatted and laid out in a sensible way.

### **Key points**

- Always use *styles* – for ease, efficiency and consistency.

- Help your readers by using distinctive formats for different elements of the text, especially for different heading levels.
- Think about *paragraph format* and *page layout* – what will work best for your readers?
- For consistency across a set of documents, create a *template* with all the styles and settings you want to use.

This, though, isn't a comprehensive guide to formatting in Word. There are many more tools, tricks and good practices that you can learn about, and many more types of formatting that you may need to deal with. A few useful online resources are listed on the next page. Happy hunting ...

## Further reading

- Microsoft: [Word help center](#)
  - ['Format text'](#)
  - ['Lay out pages'](#)
- LibroEditing (Liz Dexter): ['Resources for Word \(and other Microsoft Office software\) users'](#)
- Louise Harnby: ['Formatting your book in Word: How to save time with the Styles tool'](#)

**GH Editorial** is a service run by Graham Hughes, an editor and proofreader with a background in information technology.

Graham can work with many types of written material, but specialises in business documents and non-fiction books.

To learn more about Graham and how he can help you, please visit [www.gh-ed.com](http://www.gh-ed.com) or his Society for Editors and Proofreaders directory entry at [www.sfep.org.uk/directory/graham-hughes](http://www.sfep.org.uk/directory/graham-hughes).

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