

Getting Started on the MSWord Skills and Template practices for University Writing (Term Papers, Theses and More)



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Whether attending a Library Theses Office workshop, or teaching yourself the skills, you are going to need the following:

- The **basic, advance, study materials** and steps for learning the needed skills and template practices.
- **Awareness** of the wide range of help topics so you know where to go for quick help later.
- **Find it all** at www.lib.sfu.ca/theses/

(1) Take the quiz:

- It really helps to know what you don't know you are going to need to know. Inventory your own labour-saving MSWord skills: See **Quick Links** section, **“Labour-Saving Tricks in MSWord”** See also last page of this PDF.
- Equip yourself with some questions for the next steps.

(2) Take a test drive of your MSWord software:

- Here are some incredible tools you can try out and use to make your life easier:
 - “Outlining” in MSWord – for skilled outliners, reluctant outline writers, and everyone who wants to save labour organizing their ideas. See “Outline” in PDF or Powerpoint at <http://www.lib.sfu.ca/help/writing/theses/msword>
 - Create some headings using the styles list or use the ones you created in outline view, and generate a table of contents from your headings. Go to the MSWord help menu and search for “create a table of contents”
 - Try inserting some table or figure captions so you can generate a list of tables or figures. Go to the MSWord help menu and search for “add captions”.

(3) Get an overview of templates, which are designed to aid writing, not just to shape the looks after writing is complete.

- Why templates: <http://www.youtube.com/watch?v=ZaHbvBh4R2w>
- You need to **START** with an SFU thesis, term paper or other template, creating a ready-to-use document, **BEFORE** you start writing. SFU Library templates are available for:
 - Research proposals

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- Discourse and interview transcription
- Term papers
- Theses and projects
- Theses using large graphics
- Extended essays
- Customized templates for many departments and programs

- Read the facts and the FAQs:
<http://www.lib.sfu.ca/help/writing/theses/templates-faqs>
- Get a sense of what is needed for your own computer and software:
<http://www.lib.sfu.ca/help/writing/theses/templates>
- Read about how to protect your document from weird changes and make your thesis document "portable" between computers. Read about the benefits of downloading the template to folder that is movable between computers, including your supervisor's computer, AND between PCs and Macs. Go to <http://www.lib.sfu.ca/help/writing/theses/msword-pc>, the **Helpsheets for templates** section. Read "*The Portable Thesis*".
- Using a Mac? Follow the Template Appendices PDF instructions for Word 2003, as themenus are virtually the same, except for accessing the styles, found at "View/Formatting Palette." Explore where Word for Mac keeps the essential tools in its menus. Don't hesitate to consult the Mac "Help" menu.

(4) MSWord is NOT intuitive, so don't get trapped in the "when all else fails; read the manual" frustration pit. Read the instructions early, not late.

- <http://www.lib.sfu.ca/help/writing/theses/msword>. See the **Help with formatting skills section**, as well as links to other sources on the internet.
- Switching to MSWord 2007? Help from SFU and beyond SFU:
<http://www.lib.sfu.ca/help/writing/theses/msword>
- Don't like MSWord? Prefer OpenOffice or LaTeX, MSWorks or Nisus Writer? Try the otehr templates and style files at <http://www.lib.sfu.ca/help/writing/theses/other-software>

(5) If you are using graphics and tables, get a sense of the hazards and the labour-saving tricks: <http://www.lib.sfu.ca/help/writing/theses/msword>. Look in the **Help with formatting skills section** for "*Strategies for Figures and Tables.*"

For that final thesis or project:

(6) Understand copyright: borrowing the work of others? Publishing a thesis/project/essays is not "educational use" like a term paper.
<http://www.lib.sfu.ca/collections/scholarly-communication/copyright>

- Shortcut to using the work of others: This is the key help source for “fair dealing” – legally re-publishing the work of others. <http://caut.ca/uploads/IP-Advisory3-en.pdf> , especially Appendix A.

(7) At the beginning of your last term: Get an overview of the final review process: Give the final review document a very quick read to understand the difference between what is required and what is recommended: www.lib.sfu.ca/theses/ . Look in the **Quick Links** section for the PDF called **“Reviewing your own document”**.

- Then between distributing it to your committee and your defence, use it to review your work in detail.

(8) Before your defence: Get a quick overview of the complex steps coming after, and the time you will need to budget in order to submit in time for the deadline: www.lib.sfu.ca/theses/ , **Quick Links** section, **“Last Steps”**.

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WORKING SMART (INSTEAD OF HARD) – A POP QUIZ

The tools and skills listed below are available in both MSWord 2003 and MSWord 2007, though they are often in different locations. Score yourself on this inventory of MSWord tools and skills. Tick the skills you know how to do without using the Help menu, and add up your score. Then do a quick study of the Theses page help PDFs to learn key skills. After that, whenever you feel frustrated, use MSWord “Help” to go get the one skill or tool you need for the task you are working on.

Your Score:

out of 40.

▪ **8 General Skills – still working too hard:**

- Creating new documents.
- Working with text.
- Spell checking.
- Word count.
- Formatting margins, font, paragraphs, custom tabs, indents.
- Inserting footnotes or endnotes.
- Inserting and editing basic tables.
- Using “Document View” and “Select Browse Object” to save your eyes from constant scrolling.

▪ **10 Intermediate Skills – getting beyond working hard to working more smoothly and quickly:**

- Choosing MSWord options to suit your own needs and speed, and eliminate “keyboard rage” and frustration.
- Using Bibliographic software (Endnote, Reference Manager, RefWorks) to collect and “bank” references, then generate references in papers in the style of your choice:
- Making your document portable on USB keys, disks, for use on different computers.
- Setting the system dictionary for the language (Canadian English, U.S. English, etc.) required for your paper.
- Creating an easy-to-edit outline using heading styles.
- Working with styles” and “templates” to increase your control of the formatting, even in “blank” documents.
- Making the margins visible to make table and figure sizing easier.
- Inserting tables, using “autofit” to size columns, and setting up default table style and table defaults.
- Using table configurations, “heading row repeat” and paragraph “keep with next” to control how table break across pages.
- Inserting graphics, drawings using “in line with text” to keep them together with your text.

▪ **9 Skills for getting the machine to do the mechanistic work so you have time to do the thinking:**

- Using Heading styles not just for looks, but to generate a table of contents
- Inserting figure and table captions with updatable numbers.
- Using captions to generate lists of tables and figures.
- Inserting updatable cross-references (to the tables or figures) into your text.
- Customizing project dictionaries.
- Maximizing automatic spelling/typographical error correction.
- Making the computer type repetitive, long words and phrases instead of you typing them.
- Setting the standard for comma (or not) before ‘and’, quotation marks inside or outside punctuation, and spaces after periods.
- Grammar checking, customizing grammar checks, and setting readability levels.

▪ **8 Advanced Problem-Solving Skills – responding to particular needs:**

- Creating a portable custom dictionary you can use on different computers.
- Formatting sections, headers and footers.
- Creating “Landscape”-oriented pages with section breaks.
- Debugging page numbering and changing and controlling page numbering, from section to section.
- Inserting endnotes at the end of chapters/specific location without divider lines.
- Applying a template to a previously created document.
- Converting documents from other templates.
- Final tidying of format settings to accommodate content.

▪ **3 Collaborative Writing/Electronic Document Review Skills:**

- Facilitating electronic reading and reviewing with Comments (“Annotations” or “Balloons”) to work electronically with supervisors and others.
- Using revision tracking and reviewing tools for collaborative, team-based writing and editing.
- Compare and combine different versions of documents.

▪ **2 Wizardry-level Skills:**

- Creating your own templates.
- Creating and working with Master documents and sub-documents.