
Managing Your Thesis: A Practical Guide to Document Management

Sue Vecsey
Student Digital Skills Officer

<http://fms-itskills.ncl.ac.uk>

Faculty of Medical Sciences
Newcastle University



Introduction

Managing a long document such as a thesis, usually divided into several chapters, is a complicated task, and many problems can arise through poor management, overly complex formatting requirements, and incorrect application of seemingly innocuous techniques.

This document summarises a range of document management techniques designed to make managing a thesis or other long and complex document as straight forward as possible.

There is no substitute for learning and applying proper techniques. This document should be read in conjunction with other practical classes in document management, including those available at the Faculty of Medical Sciences IT Skills website¹

About the Author

Sue Vecsey is a graduate of Northumbria University and holds an Honours Degree in Further Education and Training. She also holds a Certificate in Education (FE) and has for many years been teaching in the Further Education sector.

Sue joined the School of Medical Sciences Education Development at Newcastle University in April 2010 as a Teaching Support Officer to assist in the delivery of academic IT skills teaching. In September 2015 she became responsible for all student digital skills training in the Faculty of Medical Sciences.

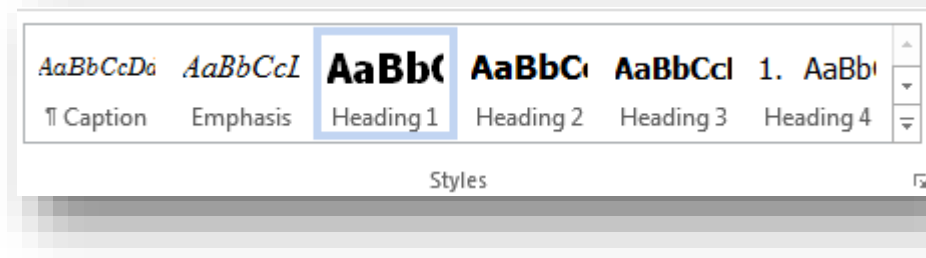
Sue's special interest lies in assessing the effectiveness of technology enhanced learning and how these technologies enhance the learning experience for the student.

¹ <http://fms-itskills.ncl.ac.uk>

Table of Contents

Faculty of Medical Sciences Newcastle University	1
Section 1. Styles	3
1.1 The Essential Rules	3
1.2 What are Styles?	3
1.3 Where are Styles found?	3
1.4 Applying Styles	4
1.5 Modifying Styles	4
1.6 Numbering headings	4
1.7 Editing Multilevel lists	5
1.8 Non-numbered headings	6
1.9 Creating your own Style Set	7
1.10 Using your Style Set "Thesis" for new chapters	7
Section 2. Managing Pages and Sections	7
2.1 Section Breaks	7
2.2 Unlinking the Header and Footer	8
2.3 Page Numbers	9
2.4 Change Page Number format	9
2.5 Mirrored margins	9
Section 3. Table of Contents	11
3.1 Inserting a Table of Contents	11
3.2 Modifying a Table of Contents	11
3.3 Update the Table of Contents to include Non-numbered headings	12
Section 4. Managing Objects	12
4.1 Tables	12
4.2 Tables over 2 pages	12
4.3 Images	13
4.4 Compressing images to reduce file size	13
4.5 Captions	14
4.6 Cross-references	15
4.7 Equations cross-references	15
4.8 Moving images	15
Section 5. Merging Chapters	15
5.1 The Essential Rules	15
5.2 Recommended ways of merging	16
5.2.1 Copy and Paste	16
5.2.2 Insert File	16
Appendix A : Using Headings for Appendices	17

Section 1. Styles



1.1 The Essential Rules

Use appropriate styles for specific types of text, such as Headings, Quotes and Lists.

- Use an appropriate Style Set.
- Be consistent.
- Avoid blank lines in your document.

1.2 What are Styles?

Styles are capsules of information that contain everything that Word needs to know about how a piece of text will look and behave on the page. More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmcl/styleswhat.html>.

Styles control the:

- Font style,
- Text size,
- Line spacing,
- Spacing between paragraphs,
- List effects,
- Borders,
- Hierarchy within the document.

1.3 Where are Styles found?

The Styles gallery shows a small selection of the available styles in Word. This menu expands to show the Styles Pane where more styles are revealed when you select the expansion arrow, as highlighted in yellow in Figure 1:

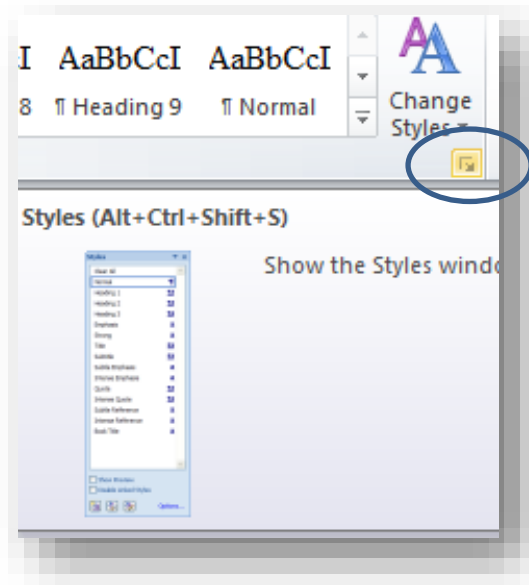


Figure 1 The Styles Pane

1.4 Applying Styles

Heading 1 should be used for all chapter titles. To apply a heading style, place the cursor in the text then select **Home** tab > **Styles** group > **Heading 1**.

Heading 2 should be used for all subheadings and Heading 3 should be used for all subheadings of Heading 2.

1.5 Modifying Styles

You can modify styles to suit your own requirements and preferences.

To modify a style, place your cursor on the heading and find the style in the **Styles Pane**, right click over the style and choose **Modify**.

Normal is the style used for all body text. It should be applied to **all text** except headings.

1.6 Numbering headings

In a thesis, it is common practice to use multilevel lists to number headings. More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmcl/multilists.html>.

Multilevel lists can be applied to headings via the **Home** tab > **Paragraph** group (see Figure 2).

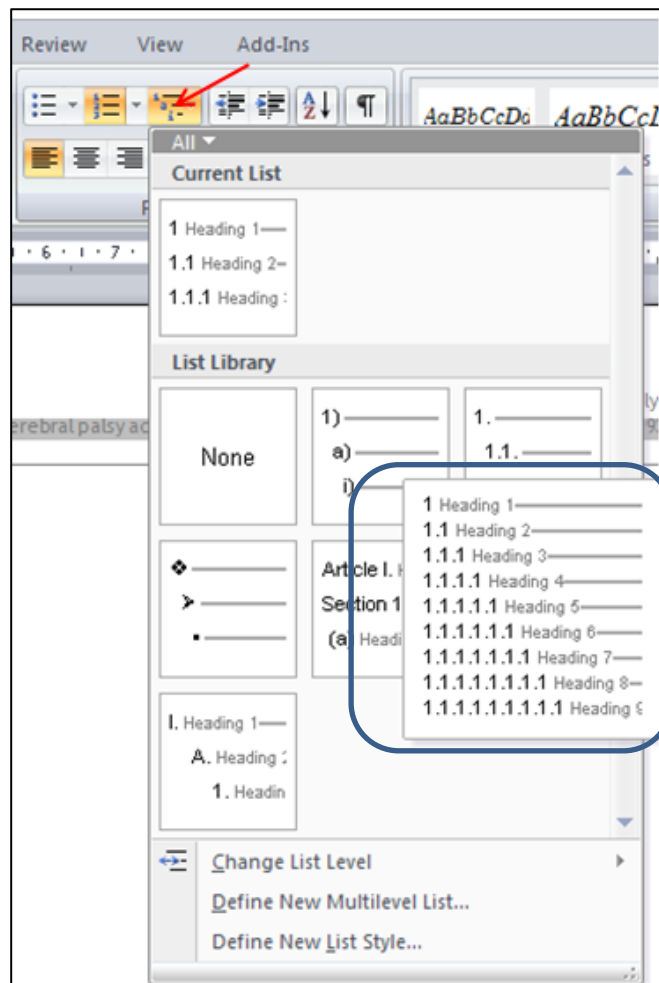


Figure 2 Applying automatic numbering to headings

1.7 Editing Multilevel lists

To include the word 'Chapter' before the number one in Heading 1, e.g. Chapter 1:

- Ensure that your cursor is placed on Heading 1.
- Return to the multilevel list menu and select **Define New Multilevel List...** from the options at the bottom of the window.
- Select **Level 1** and enter the word 'Chapter' before the number and leave a space. (See Figure 3).

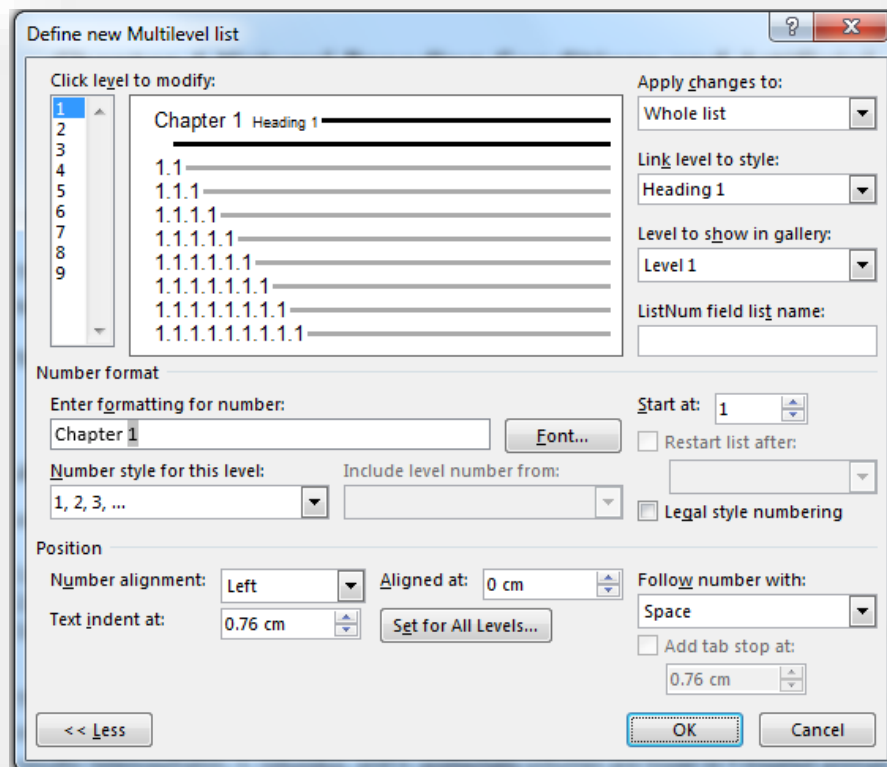


Figure 3 Editing the multilevel lists

1.8 Non-numbered headings

Some headings will need to look like Heading 1, but will have no numbering at all. Examples of this are Abstract, Acknowledgements, Dedication, Table of Contents, List of Figures, List of Tables and References. More information at: <http://fms-itskills.ncl.ac.uk/pgres/adm/headingsnomll.html>.

You will need to create a new style to substitute as a heading. To do this:

- Open the **Styles** pane and create a new style by selecting the **New Style** button at the bottom left of the **Styles** pane. (See Figure 4). Call the new style 'Thesis'.

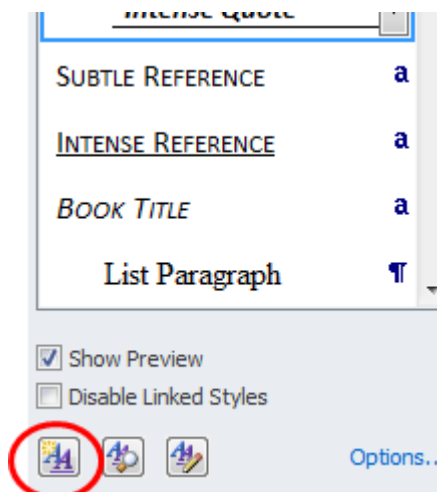


Figure 4 Creating a new style

Give the new style the following attributes:

- Based on **Heading 1**.
- Font size and font: Same as Heading 1 (look and see).
- Bold and Left Aligned.
- **Format > Paragraph > Indents and Spacing**: Spacing: 6pt Before and 6pt After.
- Single line spacing.
- Outline level: Level 1.
- Line and Page Breaks: Keep with Next.
- Format Numbering: Select None.

Now this style can be applied to the non-numbered headings throughout the thesis.

1.9 Creating your own Style Set

You can now save all your styles as a **'style set'** and, once saved, you can retrieve this style set and apply it to future chapters. More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmcl/stylenewset.html>.

To save the modifications to the styles as a style set:

- From the **Design** tab > **Document Formatting** group, select the drop down arrow and choose **Save as a New Style Set**.
- Name your style set appropriately, perhaps "thesis".
- This styles set will now appears in the **Custom** list.
- Select it to make sure it is applied to your chapter and set it as the **Default** (see Figure 5). *This means that these settings will be applied to all new blank chapters.*



Figure 5 Creating a Style Set

1.10 Using your Style Set "Thesis" for new chapters

When you begin a new chapter, go to the **Design** tab > **Document Formatting** group and select the style from the **Custom** list of styles.

Section 2. Managing Pages and Sections

2.1 Section Breaks

A document can be divided into different sections to allow:

- Different headers/footers for different parts of the document;

- A landscape page amongst portrait pages;
- Different page margins, columns or page numbers.

Section Breaks are available from the **Page Layout** tab > **Page Setup** group > **Breaks** option (see Figure 6).

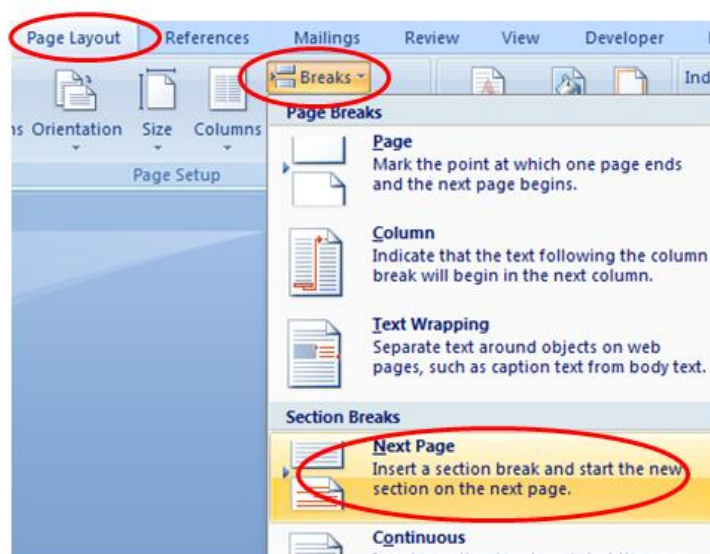


Figure 6 Inserting a Next Page Section Break

More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmcl/pagumbermodify.html>.

2.2 Unlinking the Header and Footer

Headers and Footers are usually linked between sections so that they remain the same throughout the document. The header and footer of the section to be different, plus the section that follows that, must be unlinked. This will isolate the different header, meaning that any changes to this header/footer will not affect the others.

To unlink the header and footer of the page that follows a section:

- Place the cursor in the footer or header of the page to be different.
- In the **Header & Footer** Tools tab, **Navigation** group, unselect the **Link to Previous** icon (see Figure 7).
- Repeat this process for the header and footer of the following page.
- This will prevent any alteration to this header and footer unnecessarily affecting the surrounding pages.

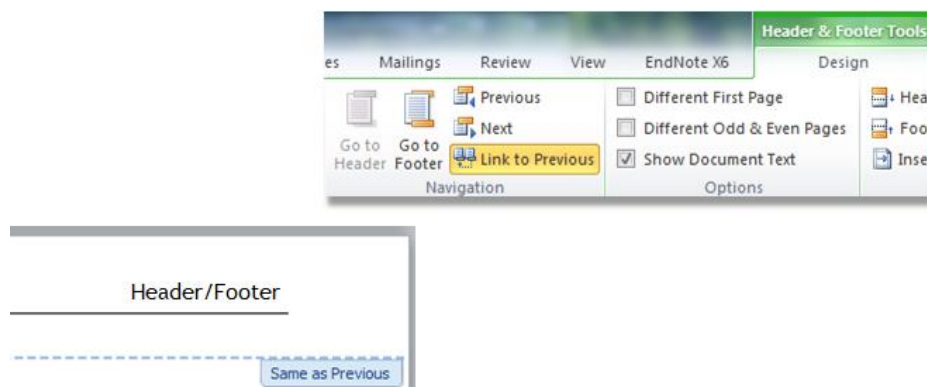


Figure 7 Unlinking the header/footer in a section

2.3 Page Numbers

To insert a page number, go to the **Insert** tab > **Header & Footer** group > **Bottom of Page** and choose from the options available.

2.4 Change Page Number format

Contents pages in a thesis are usually numbered differently from the rest of the document. For example using i, ii, iii format instead of 1, 2, 3. Chapter 1 should begin with page number 1. All the rest of the thesis should have page numbers formatted differently.

To format the page numbers differently:

- Insert a Next Page Section Break at the point where the contents will change.
- Unlink the header/footer in that section and the one that follows it.

Now that the header and footer are isolated, the page numbers in that section can be formatted differently. (See Figure 8).

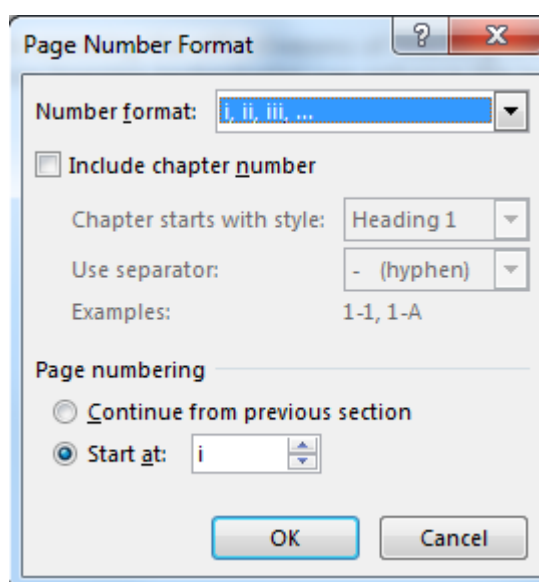


Figure 8 Formatting page numbers

2.5 Mirrored margins

The rules for the submission of a thesis at Newcastle are to be printed double-sided therefore you need to set your margins to be 'mirrored'. This will allow enough space for binding on the reverse page. (See Figure 9).

To do this:

- Set up the margins in the normal way by going to the **Page Layout** tab > **Page Setup** group and select **Margins > Custom Margins**.
- Change the margins so that the Left margin is **3cm** and all others **2cm**.
- Under **Multiple pages**: select **Mirror margins**.

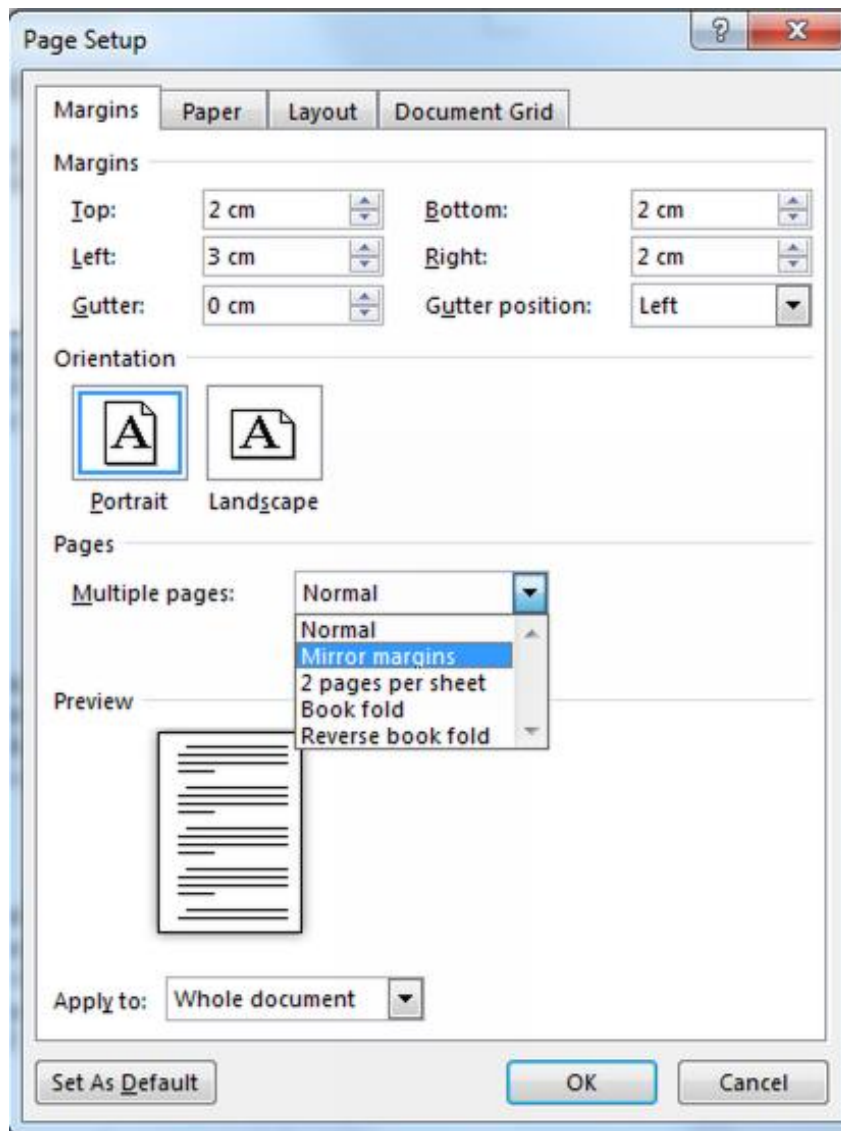


Figure 9 Mirror margins

Section 3. Table of Contents

Table of Contents

Chapter 1	Inspiration and Reading on Screen.....	2
1.1	Introduction	2
1.1.1	What is Inspiration?	2
1.1.2	What is ReadWrite?	2
1.1.3	What is ScreenRuler?	2
Chapter 2	Why would I use this software?	2
2.1	Inspiration	2
2.1.1	ReadWrite	3
2.1.2	ScreenRuler	4
2.2	Finding out more.....	5
2.3	Other stuff.....	6

3.1 Inserting a Table of Contents

Heading styles give the document visible and hidden structure. Word uses the hidden structure to create a Table of Contents.

In a thesis, the table of contents must list three TOC (table of contents) levels only:

- Heading 1 e.g. Chapter 1;
- Heading 2 e.g. 1.1
- Heading 3 e.g. 1.1.1

To insert a table of contents go to the **References** tab > **Table of Contents** group > **Table of Contents** drop down list and choose **Custom Table of Contents** > **OK**.

3.2 Modifying a Table of Contents

The Table of Contents is formatted by TOC (Table of Contents) styles: TOC 1, TOC 2, TOC 3 etc.

To modify the appearance of the table of contents, you **must** modify the TOC styles using the Styles Pane. (Figure 10).

- Place the cursor immediately before the page number within the table of contents.
- The TOC style will be highlighted within the styles pane list – scroll to find it.

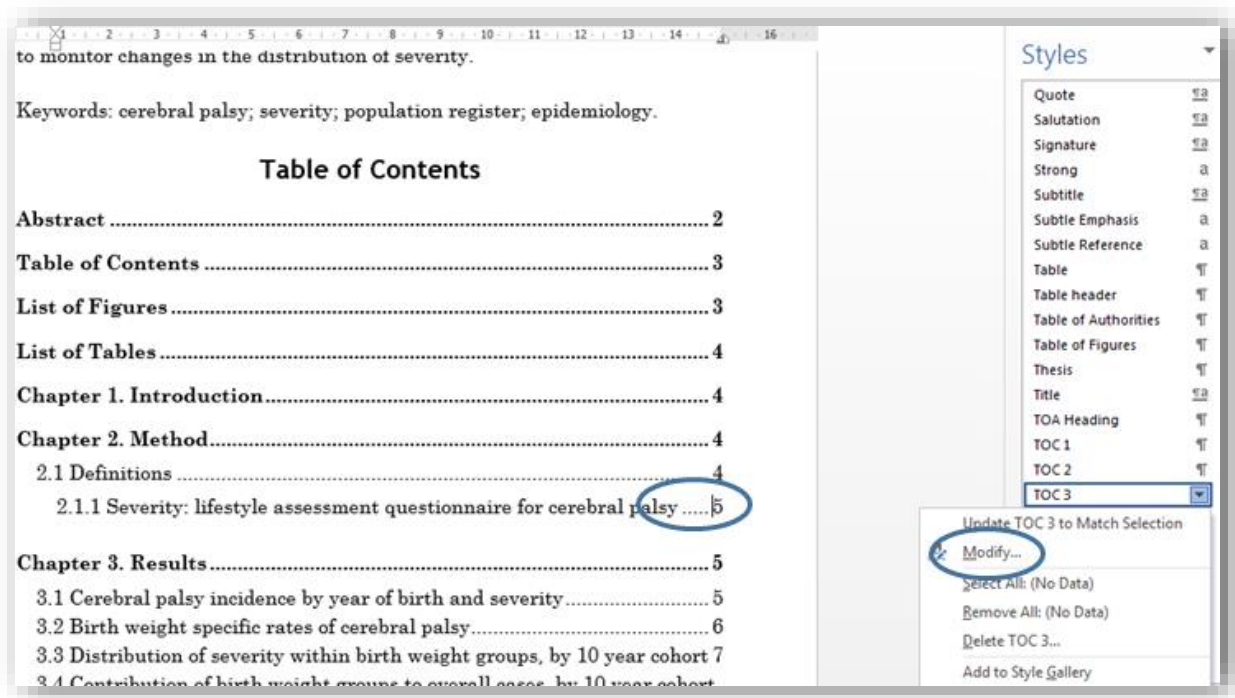


Figure 10 Modifying the TOC styles

Any changes that you make to Styles should be saved to your Style Set. Overwrite the style 'Thesis'.

More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmcl/tocmodify.html>.

3.3 Update the Table of Contents to include Non-numbered headings

Because the style 'Thesis' is based on Heading 1 and therefore has an outline level of 1, it should be automatically included in the table of contents. All you need to do is to refresh the contents. To do this, place your cursor anywhere within the table of contents. Press the F9 key on the keyboard, and select Update entire table.

Section 4. Managing Objects

4.1 Tables

Tables should be positioned with text wrapping set to **None**.

To set the table text wrapping to None, right-click over the table and choose **Table Properties > Table tab > Text wrapping: None**.

If your table is in the wrong place, do **NOT** drag it. Instead cut it out and paste it where it is supposed to go in the document.

More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmit/tables1.html>.

4.2 Tables over 2 pages

If a table has to spread over two pages, you could repeat the header row to help the reader make sense of the page two columns.

To repeat the header row of a table:

- Select the header row;
- Right-click over the table and choose **Table Properties**;
- Under the **Row** tab, tick the '**Repeat as header row at the top of each page**'.
- Alternatively, place the cursor in the table and go to the **Table Tools** tab > **Layout** tab > **Data** group and select **Repeat Header Rows**.

If you want your table to be kept together on the one page:

- Select the whole table and from the **Home** tab > **Paragraph** group, explode the Paragraph dialog box;
- Select the **Line and Page Breaks** tab and in the **Pagination** section tick for **Keep with Next** and **Keep lines together**.

4.3 Images

Images are complex and very varied. You should follow some basic rules of thumb for any image that you use, especially in Word:

- Use an image editor (i.e. IrfanView) to make significant changes to an image.
- Use PowerPoint to draw schematic diagrams and annotate images with textboxes/arrows etc.
- Put images **In Line with Text**. (*Do not drag images around in the document – cut and paste instead*).
- Compress images in Word if you resize or crop them to reduce file size.

4.4 Compressing images to reduce file size

Compressing a picture or high resolution photo will dramatically reduce the size of your file without reducing the quality of the image to an unacceptable level.

To compress images in Word:

- Select the image then choose **Picture Tools** tab > **Format** tab > **Adjust** group > **Compress** picture.
- Ensure that both Compression options are ticked. Apply only to this picture and Delete cropped areas of pictures. (Figure 11).



Original file size - 771KB



File size after compressing in Word - 41.6KB

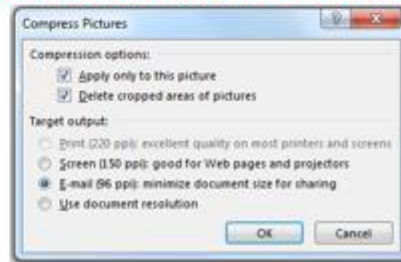


Figure 11 Compressing images

More information at: <http://fms-itskills.ncl.ac.uk/images/>.

4.5 Captions

You should use the caption tool within Word because caption numbering is updated automatically. Word makes managing figures and tables in a document much easier than trying to do it manually. Re-numbering a long document without using these tools can be tedious and frustrating. Using the caption tool will also enable you to produce a List of Figures. More information at: <http://fms-itskills.ncl.ac.uk/pgres/dmit/referencing.html>.

To insert a caption:

- Place the cursor where the caption is to appear.
- Go to the References tab > Captions group > Insert Caption.

By default, Word provides caption labels - Figure, Table and Equation, but you can create a different label for use with your captions. To do this:

- Display the **Caption** dialog box and select **New Label**.
- Enter the new label, exactly as you want it to be displayed.
- Press **OK**.

You can now use the newly defined label when you need to add captions just as you normally would, but choose the caption you just defined.

The Caption style can be modified just like any other Heading style. Remember, if you do this to update your 'Thesis' styleset.

4.6 Cross-references

Cross-references refer to figures or tables elsewhere in your document (e.g. 'see Table 1').

You can only insert a cross-reference once a caption has been inserted.

To insert a cross-reference:

- Place your cursor where the cross-reference is to appear (in the main text).
- Go to **References** tab > **Captions** group > **Cross-reference**.
- From the **References Type** drop down menu, select the appropriate reference type (e.g. Figure).
- From the **Insert reference to** drop down menu, select the option '**Only label and number**'. The explanation will not be inserted.
- Select **Insert**, then **Close**.

4.7 Equations cross-references

When you insert a cross-reference to an equation, the cross-reference will include the entire equation. To avoid this, put the equation and caption in separate cells of a single-row, two-columned borderless table.

4.8 Moving images

Remember if you move an image or cut an image out, you need to insert the cross-reference to that image again otherwise you will get an error message.

Section 5. Merging Chapters

5.1 The Essential Rules

- Always keep the original chapters separate and intact.
- Be logical and systematic when combining the chapters.
- Only merge the chapters together **just before you print**.
- **Proof-read** and edit your work **before merging**.
- **Unformat citations before** merging documents.
- **Save** all sections properly, with back-ups on a separate disk, before merging them.
- **Save** the files onto your H: drive (Documents folder), and avoid working on files stored on a removable disk or in email.
- **Save** the merged document between each chapter merge.
- Format the EndNote bibliography and in-text citations once all chapters have been merged.
- **Thoroughly check** all automatic text including headers and footers, page numbers, numbered lists, captions, cross-references, lists of figures/tables, table of contents, footnotes and EndNote in-text citations and bibliography. Update these fields before printing then check them again.

More information at: <http://fms-itskills.ncl.ac.uk/pgres/mld/>.

5.2 Recommended ways of merging

- Copy and Paste
- Insert File

It is important to choose the most appropriate method for your IT competence and confidence, whilst bearing in mind other considerations such as method of printing, preferences on editing, speed of computer being used, considerations of file size and document complexity etc.

5.2.1 Copy and Paste

Exactly as it says on the tin, copy the chapter you wish to merge and paste it at the end of the previous chapter.

- Start a new document.
- Unformat the citations in the first chapter, using the **EndNote** tab > **Bibliography** group > '**Convert Citations and Bibliography**' drop down list > '**Convert to Unformatted Citations**' option.
- Insert a **Page Break**. (*You don't need to insert a Next Page Section Break because you are working within the Chapters section*).
- Repeat the process for each chapter, adding them in the correct order.
- Save the merged document.

5.2.2 Insert File

Use **Insert** tab > **Text** group > **Object** option > **Text from File**.

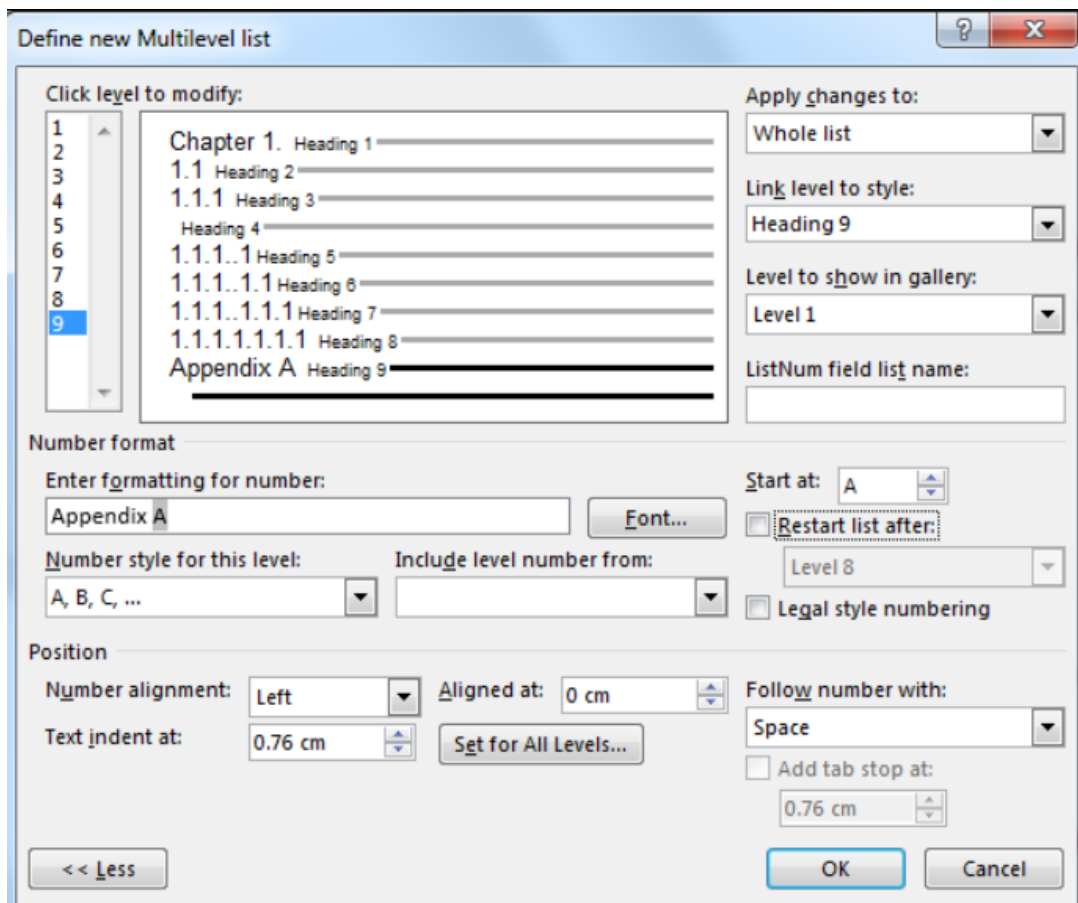
- Unformat the citations in all chapters.
- From the **Insert** tab > **Text** group, select the arrow next to **Object** and choose **Text from File**.
- In the **Insert File** dialog box, locate the chapter to insert and double-click it.
- Save the document.
- Repeat the process for each chapter, adding them in the correct order.

Appendix A: Using Headings for Appendices

Appendices titles should also use Heading styles which should be labelled **Appendix A**, **Appendix B** and so on.

Modify Heading 9

- Right-click **Heading 9** and choose **Modify**.
- Style based on: **Heading 1**.
- Font style and size: Same as Heading 1 (look and see).
- From the **Home** tab > **Paragraph** group, select the **Multilevel** list tool.
- Select **Define New Multilevel List**.
- Select **Level 9**.
- In the **Number style for this level:** box, enter **Appendix** then select **A, B, C, ..** numbering style;
- Select the **More >>** button at the bottom of the dialog box;
- Make sure the **Start at:** is at **A**.
- Link the level to **Heading 9**.
- Untick the '**Restart after Level 8**' box.
- Set the '**Follow number with**' to Space.
- OK to save the changes.



Update the Table of Contents

- Re-insert the Table of Contents, but select the Options button.
- Scroll through the list of Available styles and against Heading 9 enter 1 in the TOC level.