

Memo

To: MS Word users
From: Roger Bakeman
Date: March 28, 2018 (revised March 28, 2021, and May 21, 2021)
Re: Why You Should Use Microsoft Word Styles

Styles are formatting specifications applied to text. They have long been used by printers and have been a feature of Microsoft Word since Version 1.0. Implementation details have changed with successive versions, most dramatically when Windows and Word changed from the text-based Disk Operating System (DOS) to the graphic user interface (GUI) of Windows. Many of the details, including the location of key files and how to navigate to key dialog boxes, have changed with successive versions of Word, but the underlying concepts and the advantages of using styles have not changed.

This memo explains how styles look and work with Windows 10 and the current version of Microsoft Word (Office 2019) but should be essentially the same for other recent versions of Windows and Word. If what you see is different from what is presented here, some exploration (hunt-and-click) or a question posed to Google should help. As Word has evolved, it has become a vastly over-decorated Christmas tree—more and more “features” have been added. In this memo I attempt to focus on the basics, recommending some changes to Word default settings that should help. An effective way to read this memo is to open it in Word. You can then see, and try, what I am describing.

Advantages of Styles

Advantages include:

1. **Standardization.** When styles are incorporated in a template, documents prepared by the user or users of that template will maintain a standard look and style.
2. **Flexibility.** If you want to change the font, the format of headings, or other formatting features—and if styles have been consistently applied—such changes can be effected throughout a document with a single change to a style specification.
3. **Navigation.** When styles have been consistently applied, the Navigation Pane can be used to move easily and quickly about your document. More on this later.
4. **Other advanced features**—for example, a table of contents with page numbers that change automatically as you edit your document—are available only if styles are used.

Hard and Soft Formatting

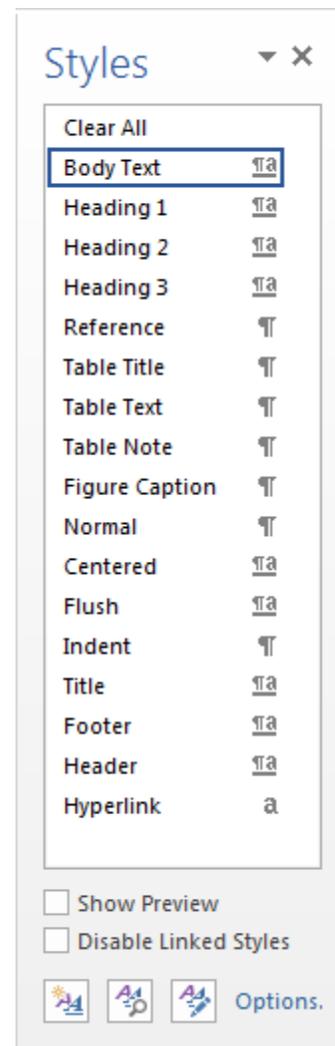
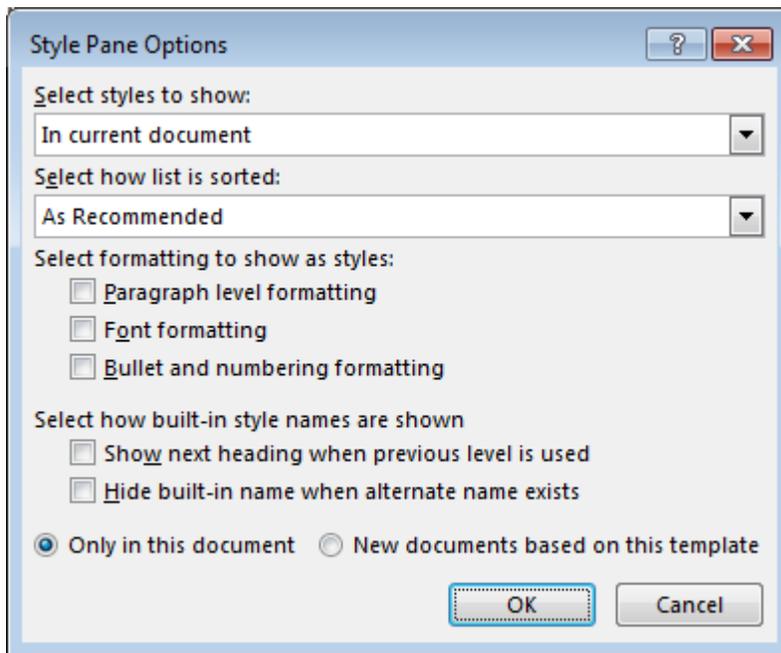
You are using hard formatting when you select and explicitly format text—for example, making the font Times New Roman or Calibri, or making the text bold or italic—or when you select a paragraph and make it single or double spaced. You are using soft formatting when you let *Microsoft Word styles* (defined in the next paragraph) determine the formatting. If you have not consciously been using these styles, almost all of your formatting probably has been hard. Hard formatting always overrides the soft formatting specified in styles. To use styles effectively—with some exceptions I’ll mention later—you will want to avoid hard formatting.

Style Specifications

Each Microsoft Word style is identified with a unique name. Two types concern us—*character* and *paragraph* (there is a third type—*linked paragraph and character*—which for our purposes is regarded as a paragraph style). Word has defined hundreds of built-in styles and allows you to define additional ones. For this memo and for the two templates (APA article and Memo) I provide, I have limited the number of styles to the few I find useful for these purposes. Some are predefined Microsoft Word built-in styles and others are styles that I have defined.

To **display the Styles pane**, which lists the styles in the current document, select the *Home* tab (in the ribbon at the top of the Word window) and then the diagonal arrow  at the lower right in the *Styles* section of the tab (for the Mac this is a button labeled *Styles Pane*). The *Styles* pane for this memo is shown below on the right.

At first you will see many more styles than those shown here. To **simplify the display** and show only what you need, select *Options* at the lower right of the *Styles* pane, which opens the *Style Pane Options* dialog. Select *In current document* and *As Recommended*, from the dropdown boxes and uncheck all *Select formatting to show as styles* boxes so that the dialog looks as below. Your display in the *Styles* pane should now match the one to the right.



Unchecking the *Select formatting to show as styles* boxes is particularly important. This is an especially egregious example of over decorating the Word Christmas tree. **If checked** (the default), new styles will be created each time you hard format, resulting in scads of new, and very likely unused, styles, all dutifully listed in the *Styles* pane. If you open the *Styles* pane of a document created by someone unfamiliar with styles (could be your former self), and see a long and confusing list, chances are the unknowing user left these boxes checked, which unfortunately is the Word default.

To keep things simple, I don't usually use **character styles** but instead use hard formatting (e.g., for italic and bold), reasoning these are formats I likely won't want to change. However, if a document contained particular terms, and I wasn't sure whether ultimately I would want to format them in a certain way (a particular font and size, italic, bold, underlined, etc.), I would define a new character style and apply it to those terms. Later I could change the style to specify whatever character formatting a journal required or that I decided I preferred.

However, I do use **paragraph styles** (and, what is the same thing, linked styles applied to paragraphs) throughout. In particular, a paragraph style can specify an Outline level—Level 1, 2, 3, etc.—which is used for the *Navigation* pane. For this and other reasons, most of the styles in my templates are for paragraphs. The styles in the *Styles* pane marked with a paragraph mark are paragraph styles, those with an underlined paragraph mark followed by “a” are linked styles (essentially a paragraph style), and those with a simple “a” are character styles.

Because the paragraph—the text you enter followed by the Enter key—is an important unit for styles, it is useful (I would say essential) to display the terminating paragraph mark (¶, aka the pilcrow). By default, this and other non-printing characters are not displayed. **To select specific non-printing characters to be displayed by Word select File > Options > Display and then check Tab characters and Paragraph marks (strongly recommended).** To see all non-printing characters temporarily, select the *Home* tab in the ribbon at the top of the Word window, and then the paragraph mark ¶ in the *Paragraph* section.

In addition to the *Styles* pane, styles are also shown in the *Styles Gallery* in the *Styles* section of the ribbon's *Home* tab:



Depending on how wide your Word window is, to see the full list you would select the downward triangle at the right of the gallery. I designed the APA article and Memo templates to show the same styles and in the same order as those in the *Styles* pane.

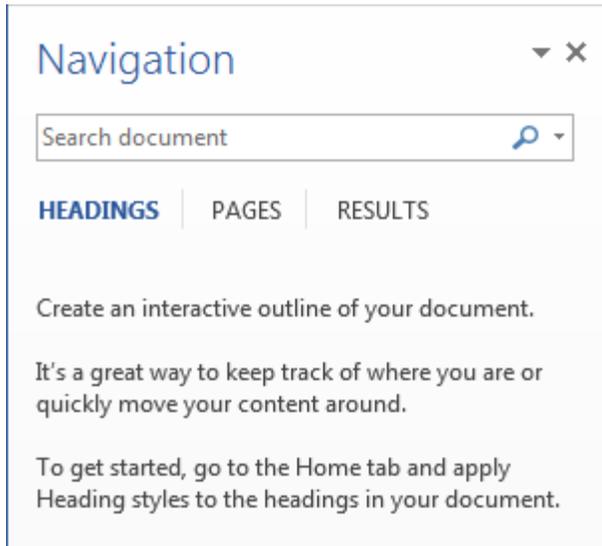
To apply a style to text, place the text cursor (I-bar) anywhere in a particular paragraph and select (left click) the desired style in the *Styles* pane. Alternatively, **to see the effect of applying a style to text**, place the text cursor (I-bar) anywhere in a particular paragraph and hover the mouse cursor (usually an arrow) over a style in the *Quick Gallery*. The text will change to conform to that style. To apply that style to the paragraph, left click the mouse.

Navigating a Document

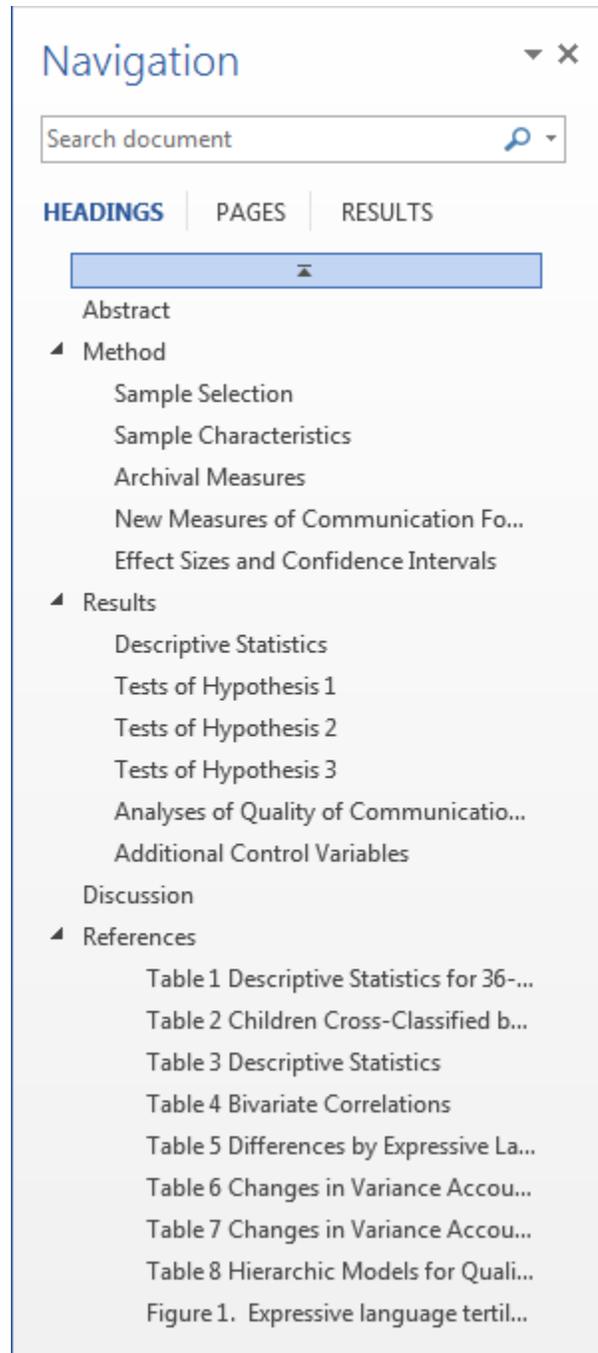
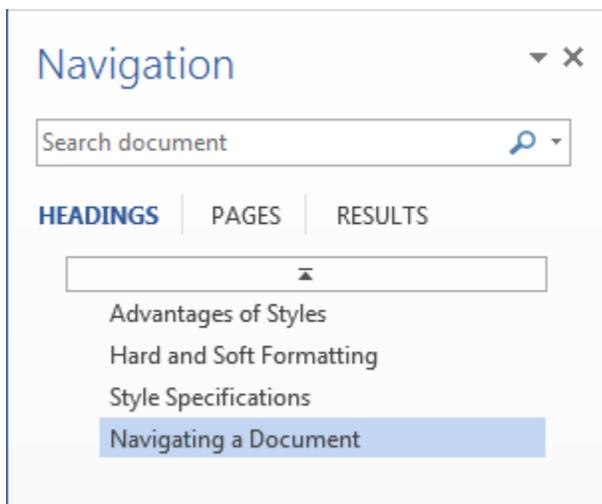
To display the *Navigation* pane, select the *Home* tab in the ribbon, and then check *Navigation Pane* in the *Show* section (for the MAC this is View > Sidebar > Navigation).

General note: Instructions given here for a PC may be different on a MAC and for other versions of Word than Office 13. But the dialog boxes, once you find them, should be the same.

If you are just beginning a new document, you will see the display below:



But after you have applied Heading 1 and 2 styles up to this point in this memo, you would see this:



By default, *Heading 1* is Level 1, *Heading 2* is Level 2, *Heading 3* is Level 3, etc. Additionally I have defined *Table Title* and *Figure Caption* styles as Level 3. The outline level for all other styles is *Body Text*, which means they do not appear in the *Navigation* pane.

The *Navigation* pane for the Hirsh-Pasek et al., 2015 *Psychological Science* article (used here to illustrate styles), is as shown above on the right. Clicking on any item in the *Navigation* pane moves the cursor to that point in the article. This ability—navigating about the article while seeing the full outline of the article laid out—is a major advantage of using styles.

Inheritance of Soft Styles

Each style has a name and a type, as noted earlier, and also names the style for the next paragraph. Most consequentially, each names the style on which it is based, which means that **styles form a hierarchy**. Each style lower in the hierarchy inherits the formatting attributes of its “parent.” Moreover, each “child” can add new format specifications, which are in turn inherited by its children. (Such inheritance is a core computer programming concept.)

Table 1.
Styles in the APA Article and Memo Templates

Name	Style based on	Style for next paragraph	Formatting added
Normal		Normal	Times New Roman 12 pt for Article Calibri 12 pt for Memo Align Left, indent 0 Single spaced, 0 first line indent 0 pts before and after paragraph widow/orphan control
Flush	Normal	Body Text	Double spaced, 0 pts after for Article Single spaced, 12 pts after for Memo
Body Text	Flush	Body Text	0.5 first line indent for Article
Heading 1	Flush	Body Text	Bold Align centered Keep with next paragraph Outline Level 1
Heading 2	Heading 1	Body Text	Align left Outline Level 2
Heading 3	Heading 2	Body Text	Italic 0.5 first line indent Outline Level 3
Reference	Flush	Reference	0.5 first line hanging
Table Text	Normal	Table Text	Single spacing 3 pts before and after
Table-Figure Note	Flush	Body Text	12 pts before (per 7 th ed., APA Manual)
Table-Figure Number	Heading 2	Table-Figure Title	Outline Level 3, Bold (per 7 th ed.)
Table-Figure Title	Heading 3	Table Note	Outline Level 4, Italic (per 7 th ed.)
Centered	Flush	Centered	Align centered
Title	Heading 1	Body Text	Outline level body text

The base style is *Normal*. It includes a font specification and standard paragraph formatting (single spaced, no lines before or after). It specifies Times New Roman 12 point for the APA article template and Calibri 12 point for the Memo template. The *Flush* style indicates paragraph formatting: double spaced for the APA article template and single followed by a 12-point space after for the Memo template, but without any first-line indents. The *Body Text* style defines the style used for all paragraphs in the document: it adds a 0.5 first-line indent for the APA article template and uses the Flush style unmodified for the Memo template. Other styles should be self-explanatory.

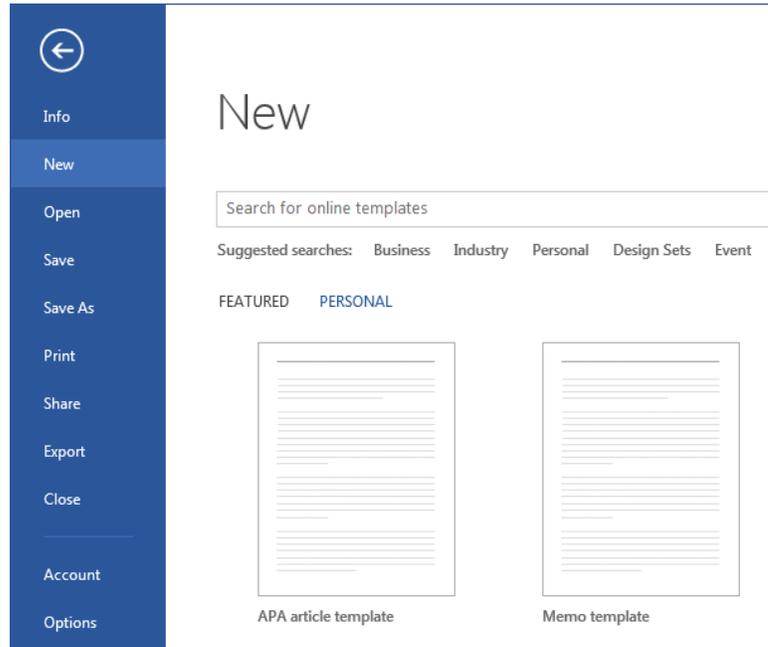
First I prepared the APA article template. Then, except for content, all I had to do to prepare the Memo template was change the font in *Normal*, the spacing in *Flush*, and remove the first-line indent in *Body Text*, and—given inheritance—I was done. This nicely illustrates the flexibility of using styles.

The APA Article and Memo Templates

Your PC should have a folder named *Custom Office Templates* listed under *My Documents*. To use the templates I have provided, copy them to this folder.

To retrieve a custom template, open Word, select *File > New* and then *PERSONAL* (under *Suggested searches* as shown to the right), and then the particular template you want to use.

Your new document will initially be named *DocumentNN*, which you can save to any folder with whatever name you wish.



These templates are not cast in stone. You can add new styles (select the *New Style* button, lower left in the *Styles* pane) or modify existing styles (select a style in the *Styles* pane and then *Modify* from the drop-down box). For example, you might want to make the *Table Title* and *Table Note* styles 1.5 spaces instead of single or double spacing. Or you might want to unbold the headings, as some journals require. Some experimentation and poke-and-click should give you a sense of the possibilities, as should examination of the Psychological Science article I have provided as an example. Any changes you make are then part of your new document.

Files: C:\Users\Documents\Custom Office Templates\
APA article template.dotx
Memo template.dotx

Breaks and Sections

Independent of styles, understanding breaks, including section breaks, is important for manuscript preparation. The *hard-line break*, the *page break*, and the *section break* are probably the three most important breaks you will use. But by default, they are not displayed. If you have changed your Word *Options* to always display paragraph marks, as I recommended earlier, you will see not only paragraph marks displayed as ¶ but also hard-line breaks displayed as ↵.

The **hard-line break** (Shift-Enter) is often useful, but especially when using styles in general and the *Table Title* style in particular. When text is entered followed by *Enter*, as is routine, text is wrapped within whatever margins are specified. A hard-line break (also called a **soft return**) interrupts word wrap but not the paragraph—the unit to which a paragraph style applies. For example, if you want the table number on one line and the title on the following line, as APA style requires, enter your title this way: Table N ↵ not this way: Table N ¶
Title ¶ *Title* ¶

Assuming the *Table Title* style was applied (and the *Title* itself italicized with hard formatting), the single paragraph with the soft return would show only one entry in the Navigation Pane, as you would wish.

Page breaks (Ctrl-Enter) and **section breaks** (Page Layout tab, Page Setup section, Breaks dropdown) are displayed if you selected *Show all formatting marks* as a display option or, more conveniently, when you select the paragraph mark in the *Paragraph* section of the *Home* tab.

Page-level formatting applies to sections. If you want to change page orientation, or margins, or both—as you might for a wide table or figure (see Psychology Science article example)—you would define sections with section breaks and apply your desired formatting to the section.

This is independent of styles—styles are only applied to characters and paragraphs, not sections—but, as with displaying paragraph marks, it is useful to display page and section breaks. Displaying these otherwise invisible characters prevents you from “flying blind” when viewing your Word document.

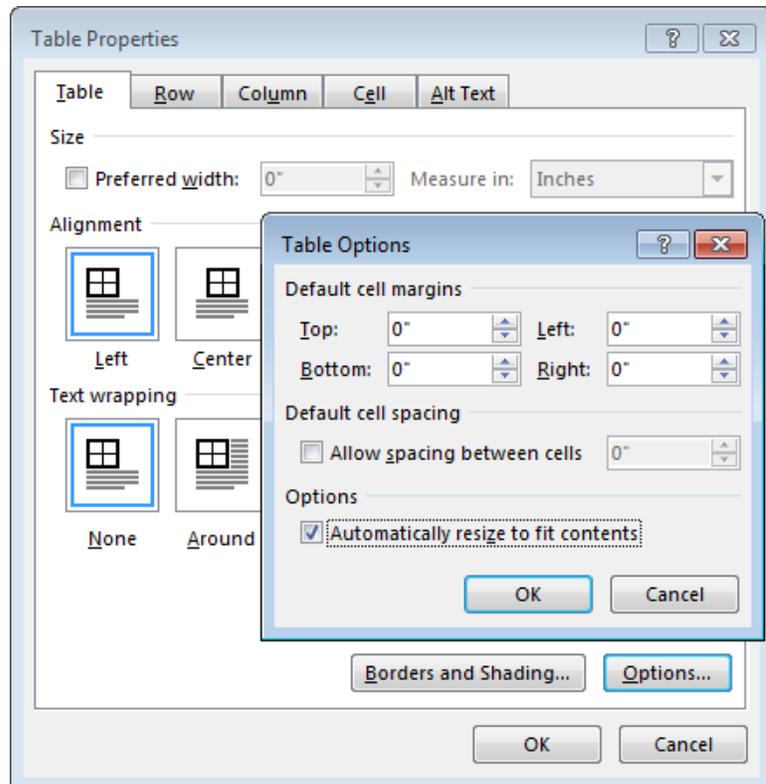
Formatting Tables

A final topic, likewise useful for manuscript preparation, concerns tables. Most users know how to insert a table (*Tables* section of the *Insert* tab), but thereafter a table, whose form is often quite specific to its content, is likely to be largely hard formatted. **I recommend changing one of the default options.** After you have inserted a table, if you place the cursor in the table, right click, select *Table Properties*, and then select the *Options...* button, you will see the default *Table Options* dialog shown below—assuming you are using one of my templates.

Uncheck *Automatically resize to fit contents*. Automatic resizing will keep you from controlling column widths.

If not using my templates, you may see left and right cell margins of 0.08", a Word default. APA table style includes horizontal lines but discourages the use of vertical lines. Thus left and right cell padding is unnecessary **and can confuse alignment and decimal tab setting**, which is why I have set these to 0 in my templates.

In the *Table Properties* dialog, *Preferred width* is initially not set (grayed out, displaying 0). If set, it forces automatic resizing, which I find undesirable. At times Word will set it to some value; if so, reset it to 0, which lets you control column widths explicitly with the *Column* tab. Likewise, Word may recheck *Automatically resize ...*; again uncheck it



You probably know how to align text within cells (left, centered, etc.) using the icons in the *Home* tab's *Paragraph* section (or by selecting the arrow  to display the *Paragraph* dialog). But for numbers in a column, **aligning them based on their decimal point** is often the better and more elegant solution. You can explicitly set tabs in the *Paragraph* dialog. Or—assuming you have checked *Ruler* in the *View* tab's *Show* section—you can first select the decimal tab icon  at the top of left-hand ruler (click repeatedly until this icon shows), and then, after selecting the cells to which you want to add a decimal tab (usually a column), click on the top ruler at the point in the cell where you want the decimal tab placed. Experimenting some should show you how this works. For other example tables, look at the Pasek et al. article.

Finally, how to learn more? Poke-and-click exploration can be useful. Almost always a dialog box lurks somewhere. The trick is to find it. Sometimes direct questions to Google can help.