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Working with ‘Nightmare’ Documents

Documents edited over time by multiple individuals often result in:

- Incorrect numbering – causing problems with document navigation and cross-references
- Inconsistent formatting – document appears unprofessional and disorganised, reduces readability
- Errors in the table of contents – text is incorrectly included/excluded
- Missing/incorrect cross references

Tight deadlines lead to users looking for a “quick fix” to document issues – often causing more problems in the long run. Sometimes users sit within different departments, firms or organisations, each bringing in their own house styles and ways of working. Issues within a document should always be explored and corrected properly.

Don't	Do
Type numbers in a numbered list	Check: <ul style="list-style-type: none"> • The correct style is applied • Multi-level list options
Manually correct text formatting issues	Check: <ul style="list-style-type: none"> • The correct style is applied • Style font options
Manually correct paragraph formatting issues	Check: <ul style="list-style-type: none"> • The correct style is applied • Style paragraph options
Manually type cross references	Correct using Word’s cross-referencing tool
Manually type table of contents	Check: <ul style="list-style-type: none"> • Styles within document • Table of contents options

Identifying Issues

Before you can resolve issues within a document, you need to be able to identify them. Many issues can be identified by eye, such as obvious formatting issues and incorrect numbering.

<p>2.3 Early termination by mutual agreement may be made in writing and subject to conditions agreed by both parties.</p> <p>1) RENT</p> <p>2.4 The monthly Rent shall be £1,200, payable in advance on the first day of each calendar month.</p>
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Clicking on a cross-reference or number helps identify whether it is manually typed – those that have been entered manually are not shaded.

A cross-reference that has been created using the Cross-Reference tool:

<p>n and habitable condition; otherwise, cleaning e Security Deposit (see clause 4.3)</p>

A manually typed number:

addresses stated above.

5.10 Notices sent via email shall be considered valid only if confirmation of receipt is obtained.

5.9.1 Change of address must be communicated within seven (7) days.

Clicking on any number in the document that has not been manually typed will display shading over any numbers in the document at the same level. In the example below, it is easy to identify 5.10 as manually typed number as it is not shaded.

5.9 Any notice required under this Agreement shall be in writing and delivered to the addresses stated above.

5.10 Notices sent via email shall be considered valid only if confirmation of receipt is obtained.

5.9.1 Change of address must be communicated within seven (7) days.

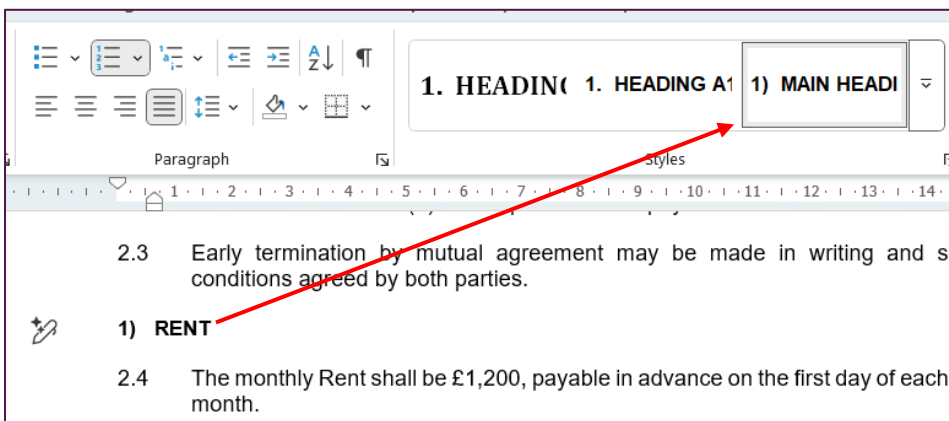
5.9.2 This agreement constitutes the entire understanding between the parties and supersedes any prior agreements or representations.

5.9.3 Amendments to this Agreement must be made in writing and signed by both parties.

5.10 This Agreement shall be governed by the laws of England.

5.10.1 Disputes shall be resolved in the courts of London, England.

Another method to identify issues in a document is to check the style applied to text. Click or select a word or paragraph to display its style in the Styles Gallery or Styles Pane. An incorrect style can lead to issues with numbering and formatting. There is more information on styles in the next section.

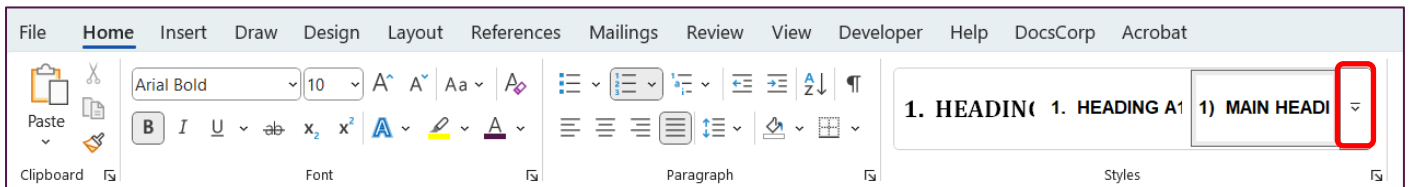


Styles

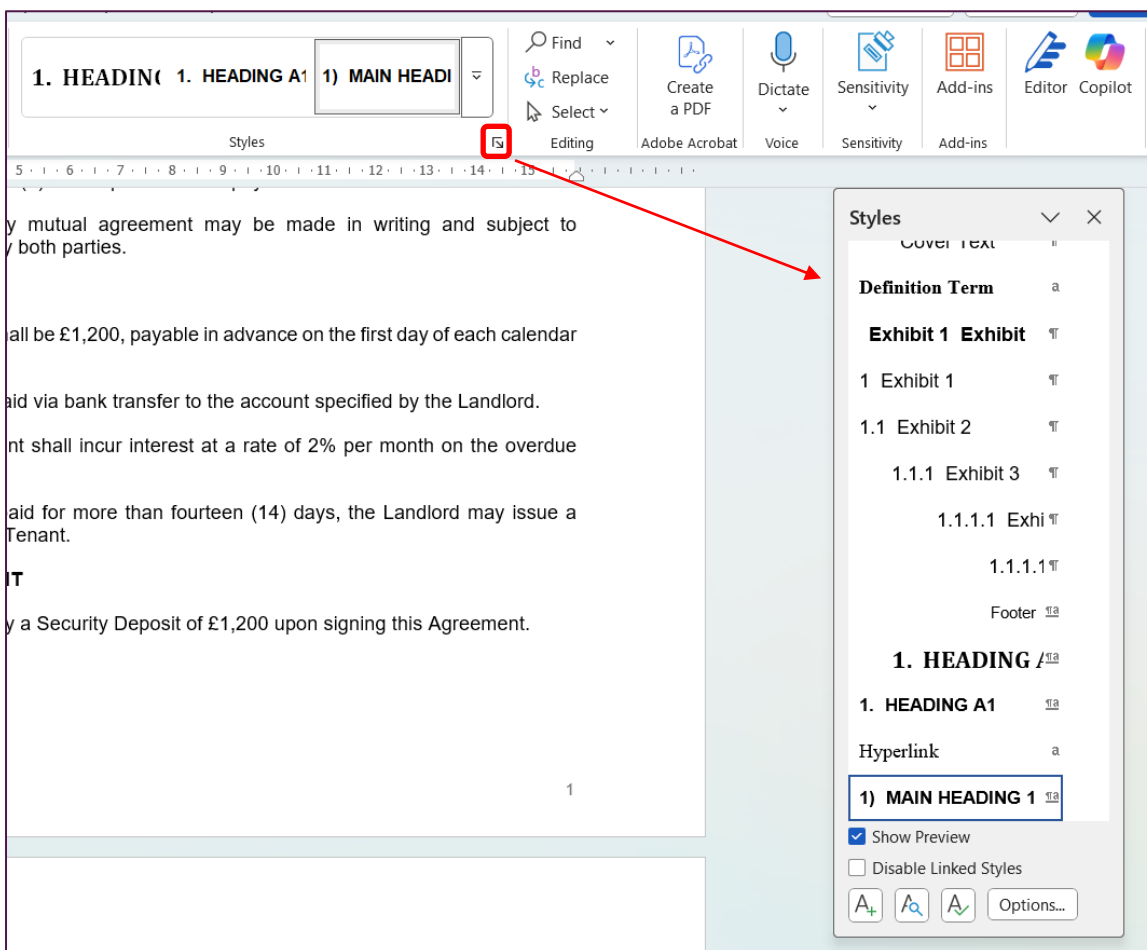
The style applied to text controls its font formatting, paragraph formatting and numbering (if the style is associated with a multi level number style).

The Styles Gallery and Styles Pane

Styles can be checked, applied and modified from the Styles Gallery in the **Home** tab. Click the arrow to display more styles. The style applied to the currently selected text will be highlighted.

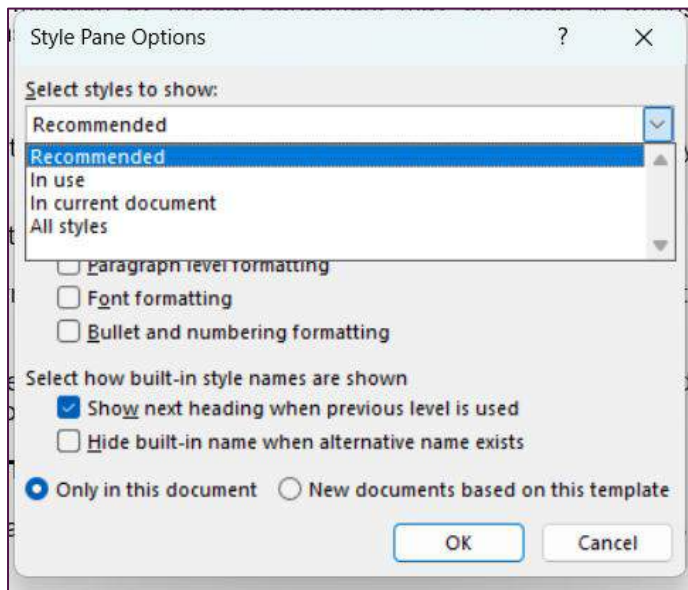


Not all styles are displayed in the Styles Gallery. To view a full list of styles, click the diagonal arrow in the bottom-right corner of the Styles area to open the Styles Pane.



Note: The Styles Pane can be moved and resized. It remains open when clicking through the document, so you may wish to place it to the right of your document when working on formatting

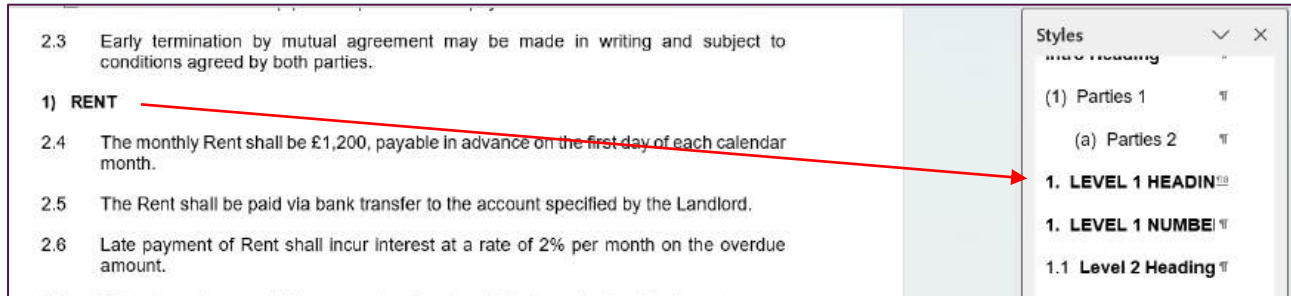
Tick **Show Preview** in the Styles Pane to display previews of each style. Click **Options...** and change the **Select styles to show** to filter the styles displayed. If you are working with a document containing many styles that are not used, consider changing this to 'In use'.



Applying Styles

Applying a Style from the Styles Gallery/Pane

If text has an incorrect style applied, click on or select the text and then click the required style in the Styles Pane or Styles Gallery.

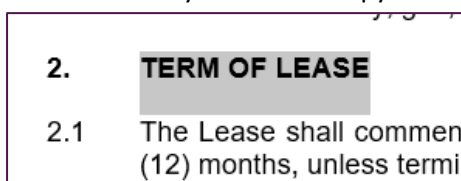


Using the Format Painter

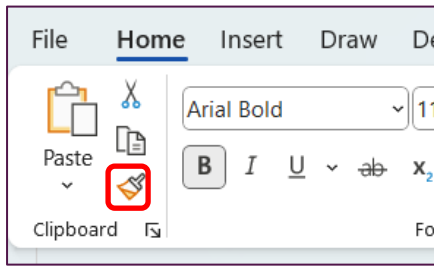
Another method to apply a style is to use the Format Painter to copy the style and formatting from one piece of text to another. This is particularly useful if you are unsure which style you need to apply, or if you have multiple paragraphs to reformat.

To use the format painter:

1. Select the text you want to copy the formatting from



2. Click the **Format Painter** icon in the **Home** tab. Your cursor will change to a paintbrush



3. Click on the text you wish to apply the style to

If you have multiple paragraphs to apply the selected style too, double-click on the Format Painter icon in step 2. This will leave the format painter turned on. To turn it off, click on the icon again or press the Esc key.

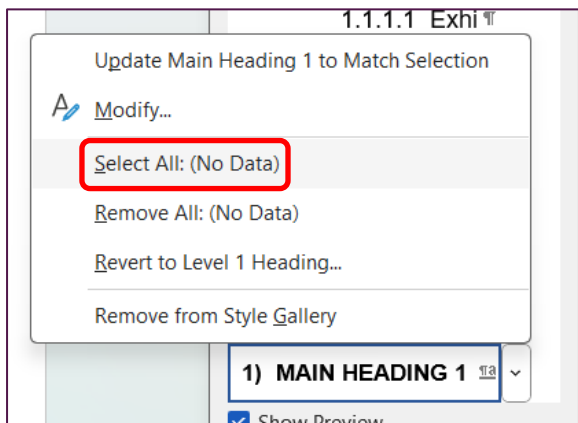
Using 'Select All'

Take a look at this example:

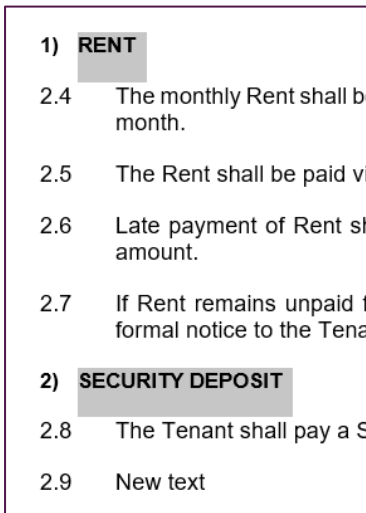
Alex has a 75-page document with multiple paragraphs formatted using the style 'MAIN HEADING', instead of her house style 'LEVEL 1 HEADING'. She is looking for a quick way to convert this text from one style to another.

To quickly convert all text formatted as one style to another:

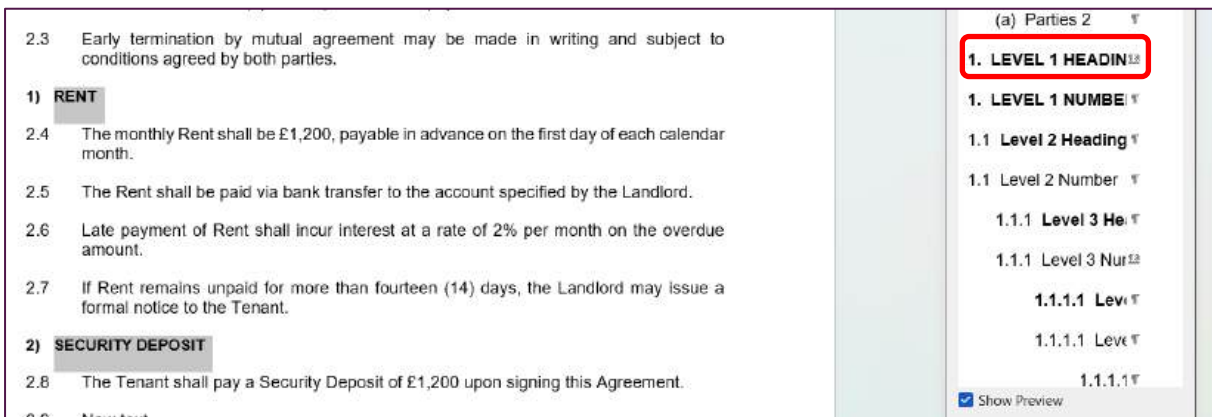
1. Click on any paragraph in the document formatted in the incorrect style (Main Heading in the example given above)
2. Right-click on the highlighted style in the Styles Gallery/Styles Pane and click **Select All**



All the text in the document formatted with the incorrect style applied will be selected



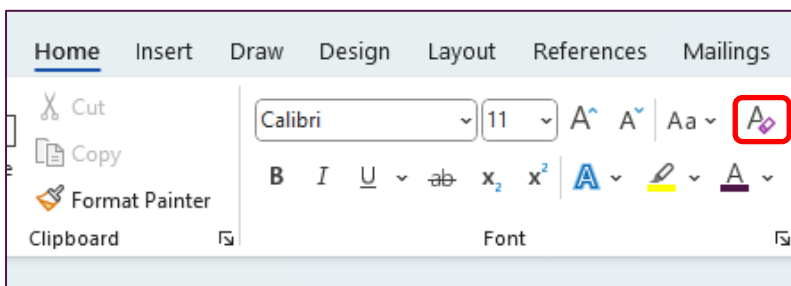
3. Click on the correct style in the Styles Pane/Styles Gallery (Level 1 Heading in the example given). It will be applied to the selected text



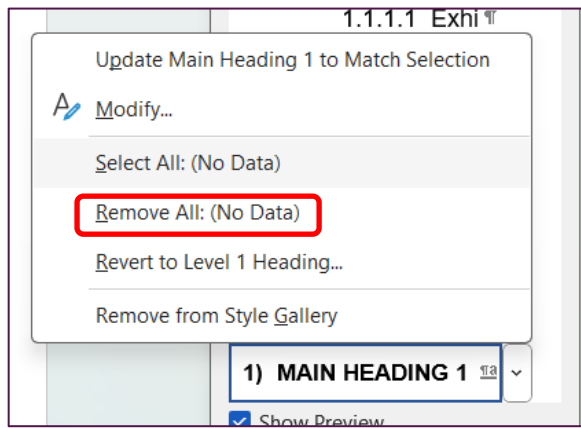
Clearing Formatting

If the correct style has been applied to the text but there are still issues with the formatting or numbering, you can try clearing the formatting and then reapplying the style.

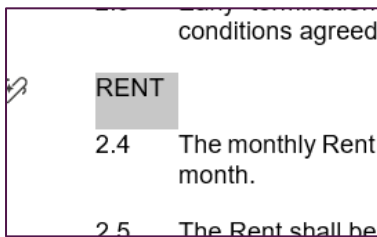
To remove the formatting from the selected text, click the **Clear All Formatting** icon in the **Home** tab.



To remove the formatting from all text of a particular style, right-click on the style in the Styles Gallery/Styles Pane and select **Remove All**.



All numbering and formatting will be stripped from the text.

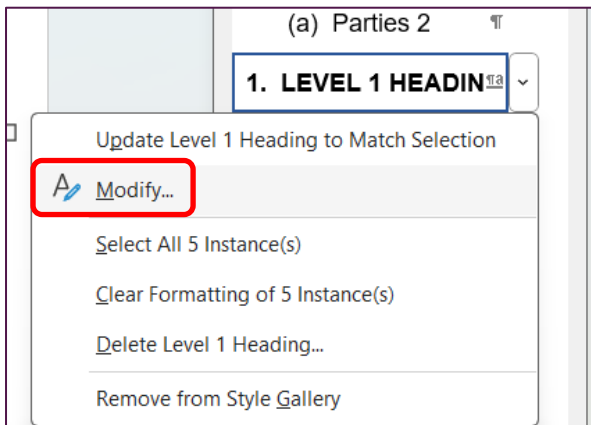


Click on the required style to apply it.

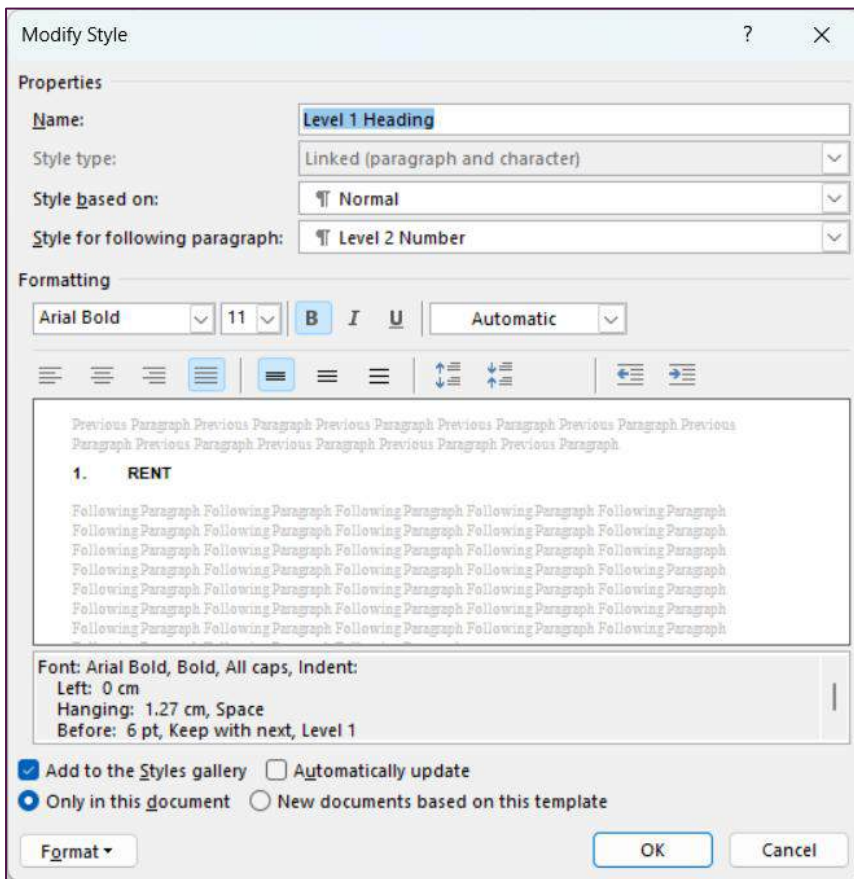
Modifying a Style

If you are still experiencing issues with formatting within the document, particularly if the issues are occurring every time you apply a style, check the style settings and modify them if needed.

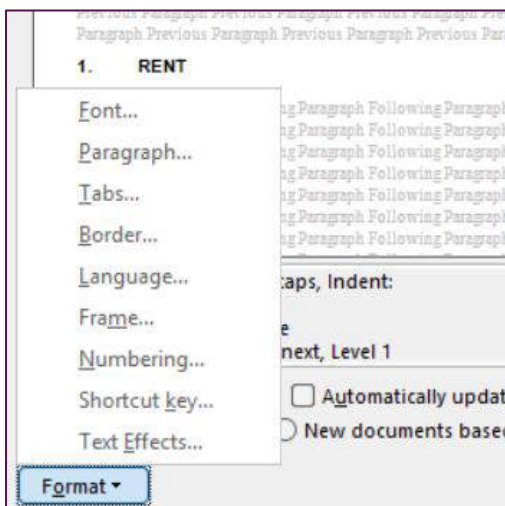
To modify a style, right-click on it from the Styles Gallery or Styles Pane and select **Modify...**



This will display the **Modify Style** dialog box. Basic formatting can be changed here, for example the font size and colour.



For additional settings, such as paragraph formatting, click **Format** and then select an option.



Note: If you are experiencing issues with numbering, follow the steps in the section 'Multi Level Numbering' within this guide

Click **OK** to apply the changes and close the dialog box. All text that is formatted with the style will now be updated with the changes made.

Multi Numbered List Styles

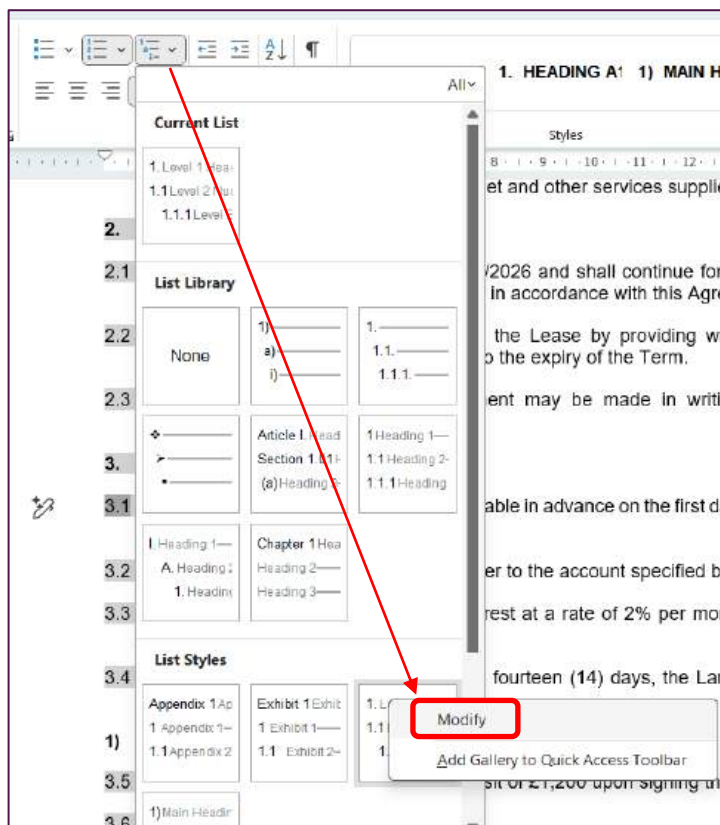
If there are issues with numbering within a document, the first step is to check the style applied to the text. A common issue is that the style used is incorrect and when the correct style is applied, the numbering automatically corrects itself.

If there are still issues with numbering in the document once the correct style has been applied, it may be due to the settings of the multi-level list.

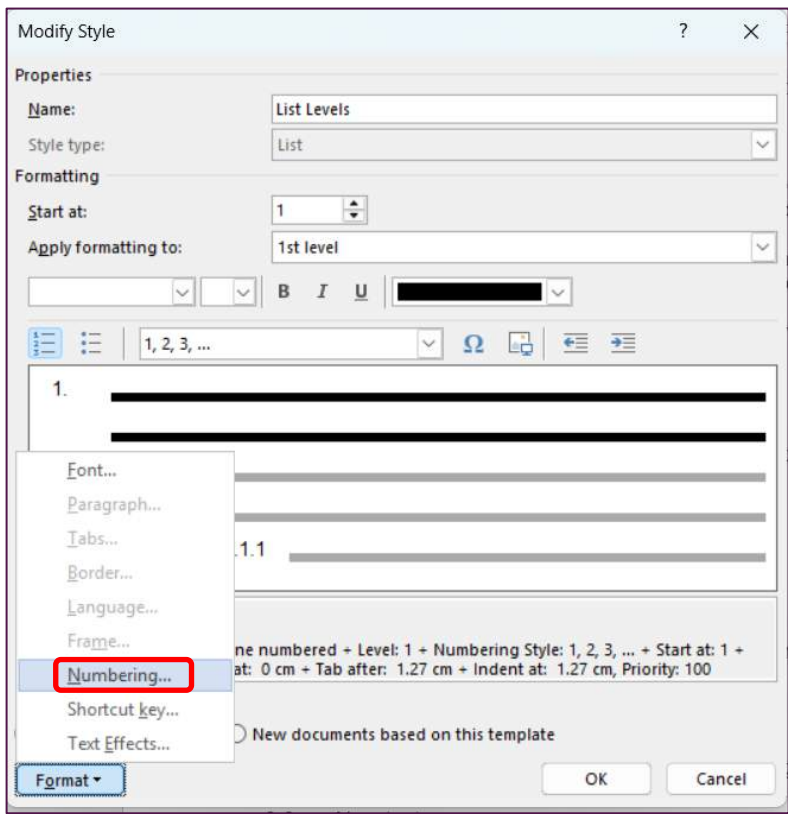
Viewing and Modifying a Multi-Level Numbered List

To access the settings of a multi-level list style:

1. Click on any numbered item in your document
2. Click the arrow to the right of the **Multi-Level List** icon on the **Home** tab
3. Right-click on the highlighted style and select **Modify**



4. In the Modify Style dialog box, click **Format** and select **Numbering**



The Modify Multilevel list will be displayed. Click **More** in the bottom-left corner to display all options (shown below).

Select the level to modify

Edit the text surrounding the number, e.g. dots or brackets

Select the number format for this level, e.g. 1 2 3 or a b c

Alignments and indents. Choose 'Set for All Levels...' if the additional indent will be the same for each level

Select a style to associate with this level

Add numbers from previous levels

Click **OK** to save any changes.

Table of Contents

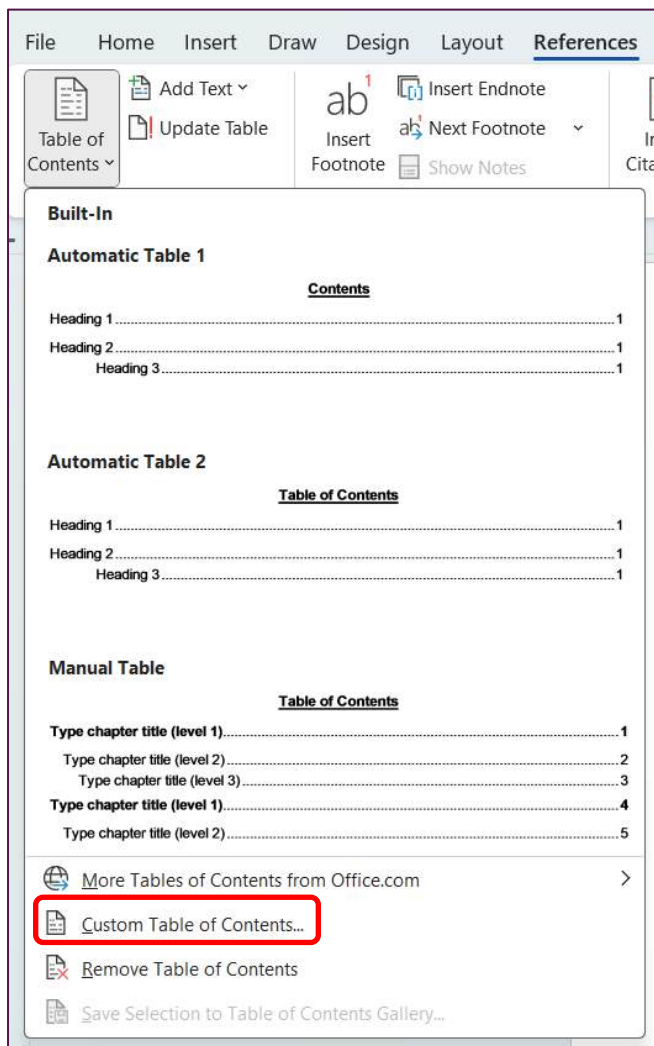
Common issues with tables of contents (TOC) include text mistakenly included/excluded, or formatting issues.

Again, the first step for checking any issues is to ensure the correct styles are used throughout the document. Often only first level are included in a TOC. If text is incorrectly included/excluded, check that it has the correct style applied.

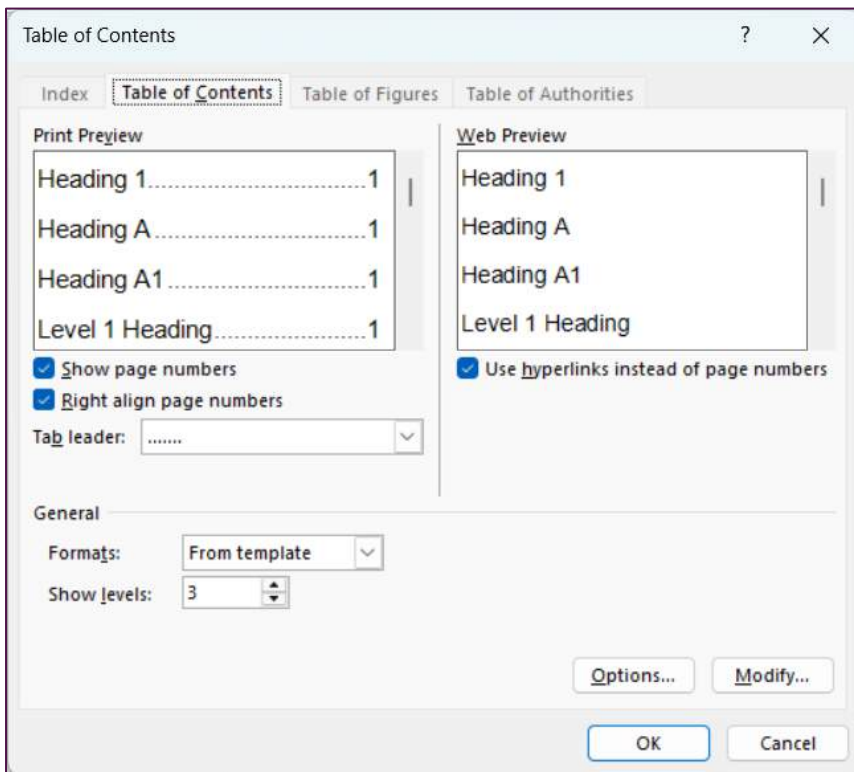
If you are still experiencing issues and the styles are correct, consider amending the TOC settings.

Changing Table of Contents Settings

To edit the settings of a TOC, click **Table of Contents** in the **References** tab and select **Custom Table of Contents**.

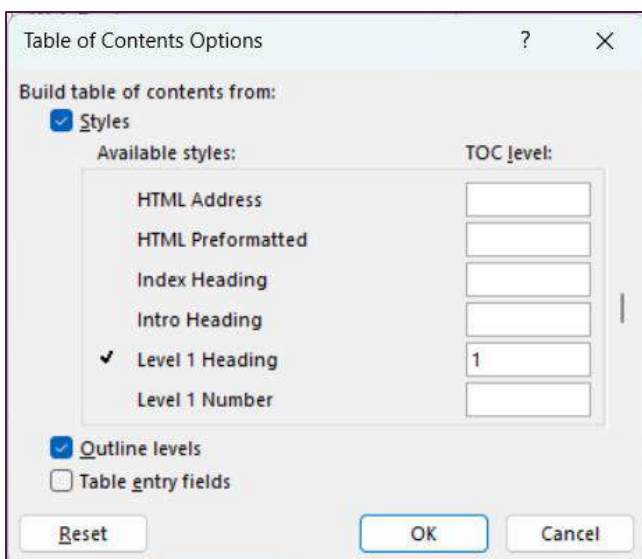


The basic TOC settings are shown here, including the **Tab leader** (the special character between the heading text and the page number). Ensure the **Show levels** setting is correct – for example, if this is set to 1, only the first level headings in your document will be included in the TOC.



Options

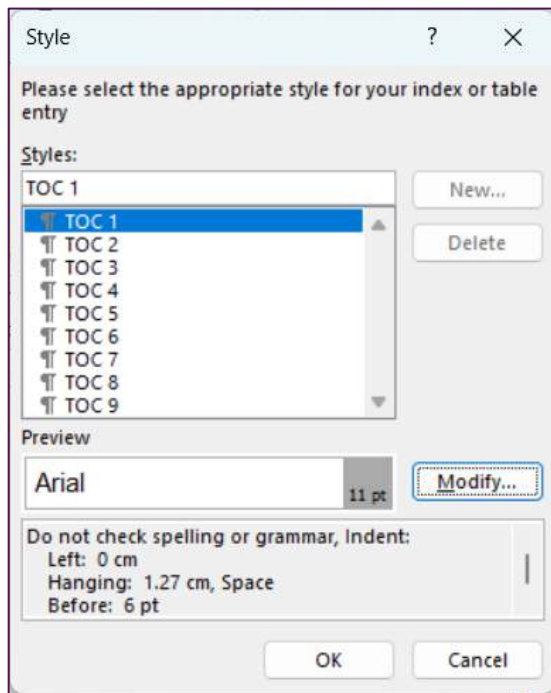
Click **Options...** in the TOC dialog box to display a list of style and their corresponding TOC level. In the example below, the style Level 1 Heading is set to TOC level 1. Ensure any styles that should be included have a TOC level assigned (by typing a number into the corresponding TOC level box). Remove the numbers from any styles that should not be included.



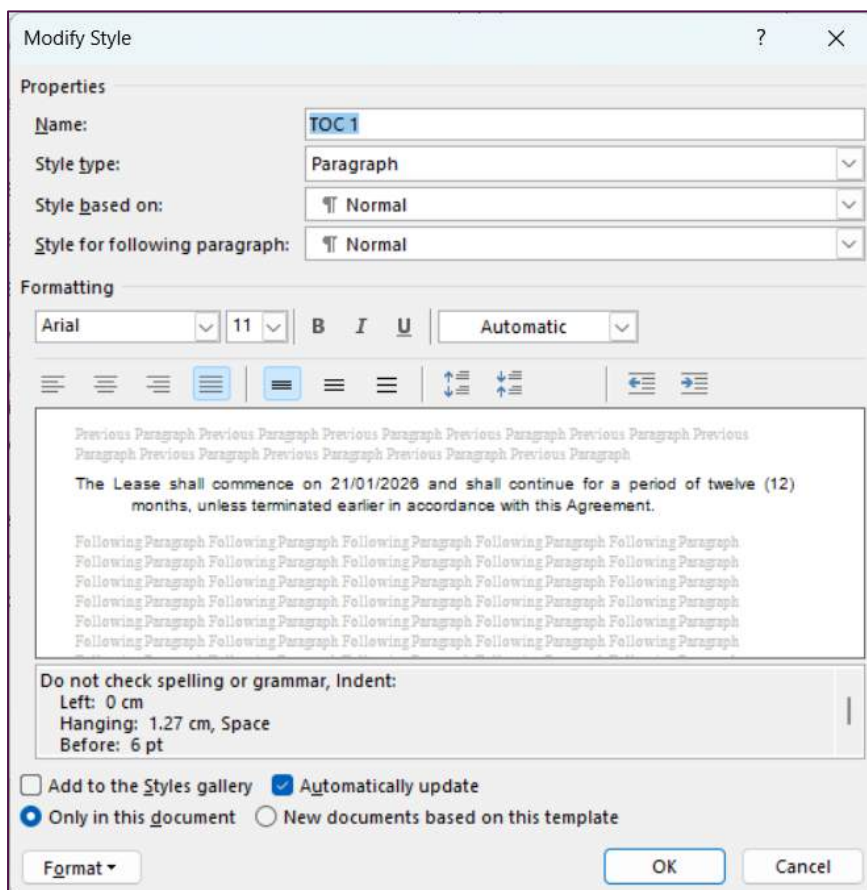
Click **OK** to save any changes.

Modify

Click **Modify...** in the Table of Contents dialog box to amend the formatting of the different TOC levels, for example to make text bold or change the alignment. Select a TOC level and then click **Modify...** to display formatting options.



Change font options here, or click **Format** to amend other options such as paragraph formatting.



Click **OK** and then **OK** to save.

Cross References

References to clauses/numbered items within a document should always be created using the cross-referencing tool within Word. Manually typed references are not accurate and take time to update when a document changes.

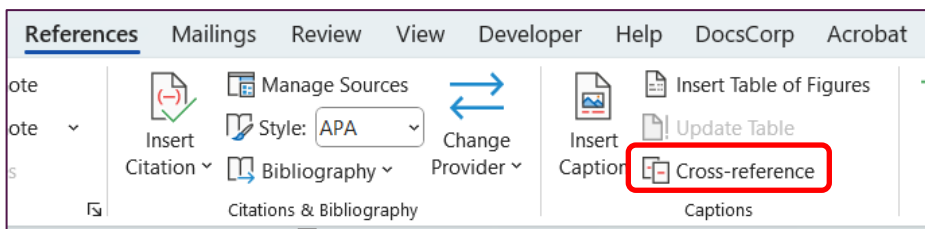
Creating a Cross Reference

To create a cross reference:

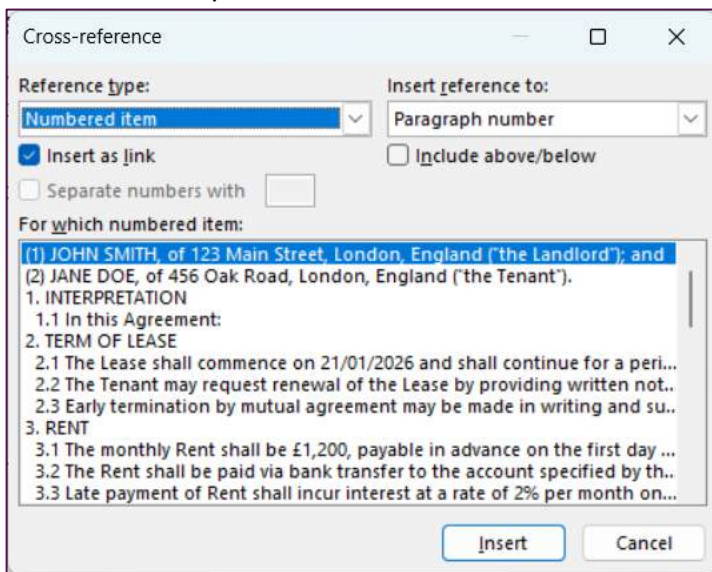
1. Click at the location that you wish to insert the cross-reference

habitable condition; otherwise, cleaning
ty Deposit (see clause |

2. Click on the **References** tab and click the **Cross-reference** button



3. This will display the Cross-reference dialog box. Ensure the **Reference type** dropdown is set to **Numbered item** and the **Insert reference to** dropdown is set to **Paragraph number**
4. Select the clause you wish to reference



5. Click **Insert**, then close the dialog box

Clicking on a cross-reference displays shading, indicating that it is a field. Holding **CTRL** and clicking the cross-reference will navigate you to the referenced paragraph.

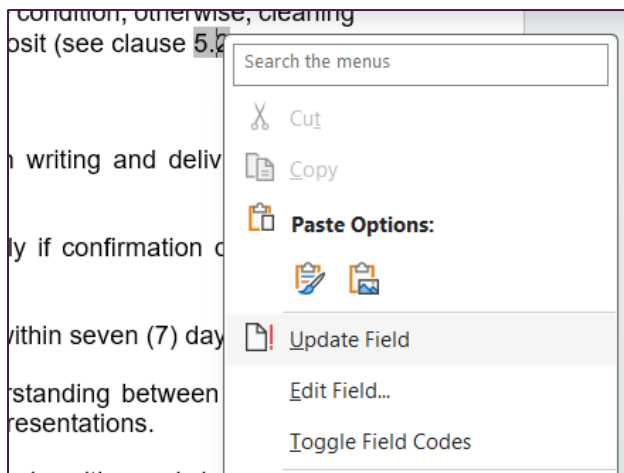
ction from the Security Deposit

ble condition; otherwi
eposit (see clause 5.2

Current Document
Ctrl+Click to follow link

Updating Cross References

Cross references do not update automatically when a document changes. To update a cross-reference, right-click on it and select **Update Field**.



To update all cross references in a document at the same time, including the table of contents, use the keyboard shortcut **CTRL + A** and then **F9**.