Use the following steps, in this order, to format your documents:

1. **Insert breaks**: Layout tab — page setup panel > breaks > section breaks > next page

2. **Separate sections**: Header and Footer tab* (cursor needs to be in header or footer*) — place cursor in first page of new section, then in options panel > uncheck link to previous > repeat for all sections, headers and footers, as needed

3. **Add page numbers**: Header and Footer tab* — insert panel >
   - For small Roman numerals in front matter: place cursor in second page, check different first page. (Double check that cursor is still on second page.) Go to very top Insert menu and select page numbers > format button > choose small Roman numerals for front matter, allow it to default to “continue from previous section”
   - For regular numerals in rest of document: place cursor on first page of regular text. Go to very top Insert menu and select page numbers > format button > choose regular numerals. Click start at and choose page 1.

4. **Apply styles**: Home tab — styles panel > click desired > click format button > paragraph > spacing: set space before value to 0 > ok > apply. To use same style on other text, highlight it and click the selected style in the styles dialog box.

5. **Generate table of contents** (after you apply styles, Step 4 above): Place cursor where you want the Table of Contents. Document Elements tab — table of contents panel > click table of contents icon. Note: If you click the down arrow, you can choose a different style.

6. **Tailor headers/footers to page contents** (after you apply styles, Step 4 above): whatever tab* — go to insert menu at very top > field > from Categories, select links and references. From Field Names: styleref > choose desired heading to match header/footer with. Click Options > Styles (at top) > select desired style/heading > click Add to Field > ok > ok

7. **Insert captions**: whatever tab — place cursor where desired in document > go to insert menu at very top > select caption > select label type desired > type in caption > ok

8. **Generate list of figures/tables**: Place cursor where you want the list of Tables and Figures. whatever tab — go to insert menu at very top > select > insert index and tables > table of figures (at top) > ok
Helpful Hints

- To display formatting, click the paragraph symbol ¶ in the Home tab.
- To update the Table of Contents, in the document elements tab, you can click the update button to the right of the Table of Contents icon, or right click (control + click on the Mac) on the table and select “update entire table”.
- To format bulleted lists and customize bullets, use the numbering function in format in the style dialog box.

* Double click at the top or the bottom of the page to open the headers and footers and make the Design tab accessible. If that does not work, go to the view menu and select header and footer.