



Templates and the Word Addin

Module 5 – Document Formatting Best Practices

Version 1.0

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1. Document Formatting

Automated templates demand superior formatting to ensure that the text behaves as required when customised adjustments are applied during the document generation process.

While a template may appear to be well crafted, it's imperative to ensure that this remains the case with every generated iteration.

A generated document needs to be flexible for post docgen alterations and should help the drafter by making this as simple as possible. Builders need to apply formatting that will control how the document responds to further manual changes.

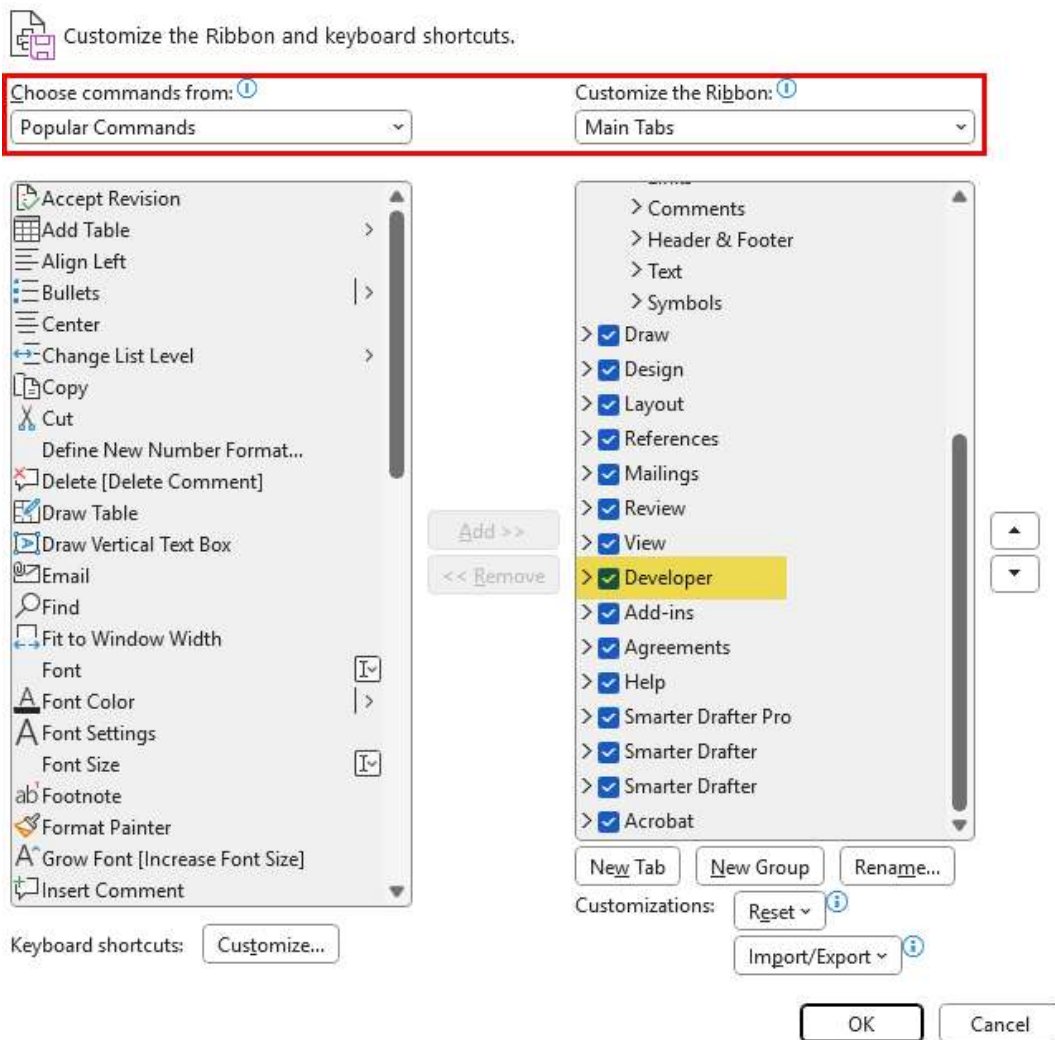
2. Best Practices

This guide provides tips and identifies key formatting tools that can assist in controlling the behaviour of text during both the docgen and post docgen phases. It is recommended that builders familiarise themselves with these tools and apply them as their usual formatting best practices.

2.1 Developer Tab and Design Mode

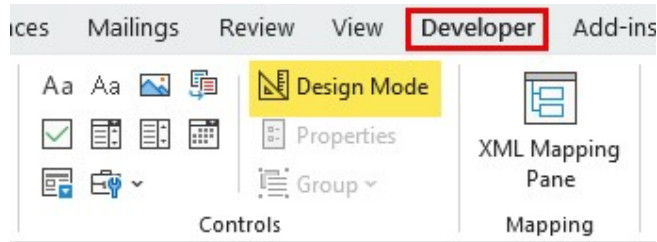
In Word, the Developer Tab is turned off by default and needs to be enabled for access to automation tools.

1. On the Word Ribbon, go to the **File** tab.
2. Click **Options**.
3. Click **Customise ribbon**.
4. In **Choose commands from** column – select **Popular Commands**.
5. In the **Customise the Ribbon** column – select **Main Tabs**.
6. Tick the **Developer** checkbox.
7. Click **OK**.



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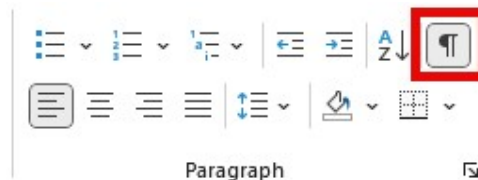
When the **Developer Tab** appears on the Ribbon, click on it and click **Design Mode**.



2.2 Show Paragraph Formatting

In Word, paragraph formatting is turned off by default. For an accurate view of what is happening with the formatting of your document, always reveal paragraph formatting.

1. On the **Word Ribbon**, go to the **Home** tab.
2. Go to the **Paragraph** group.
3. Click the **Show/Hide** button.



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Note: When working on templates **ALWAYS**:

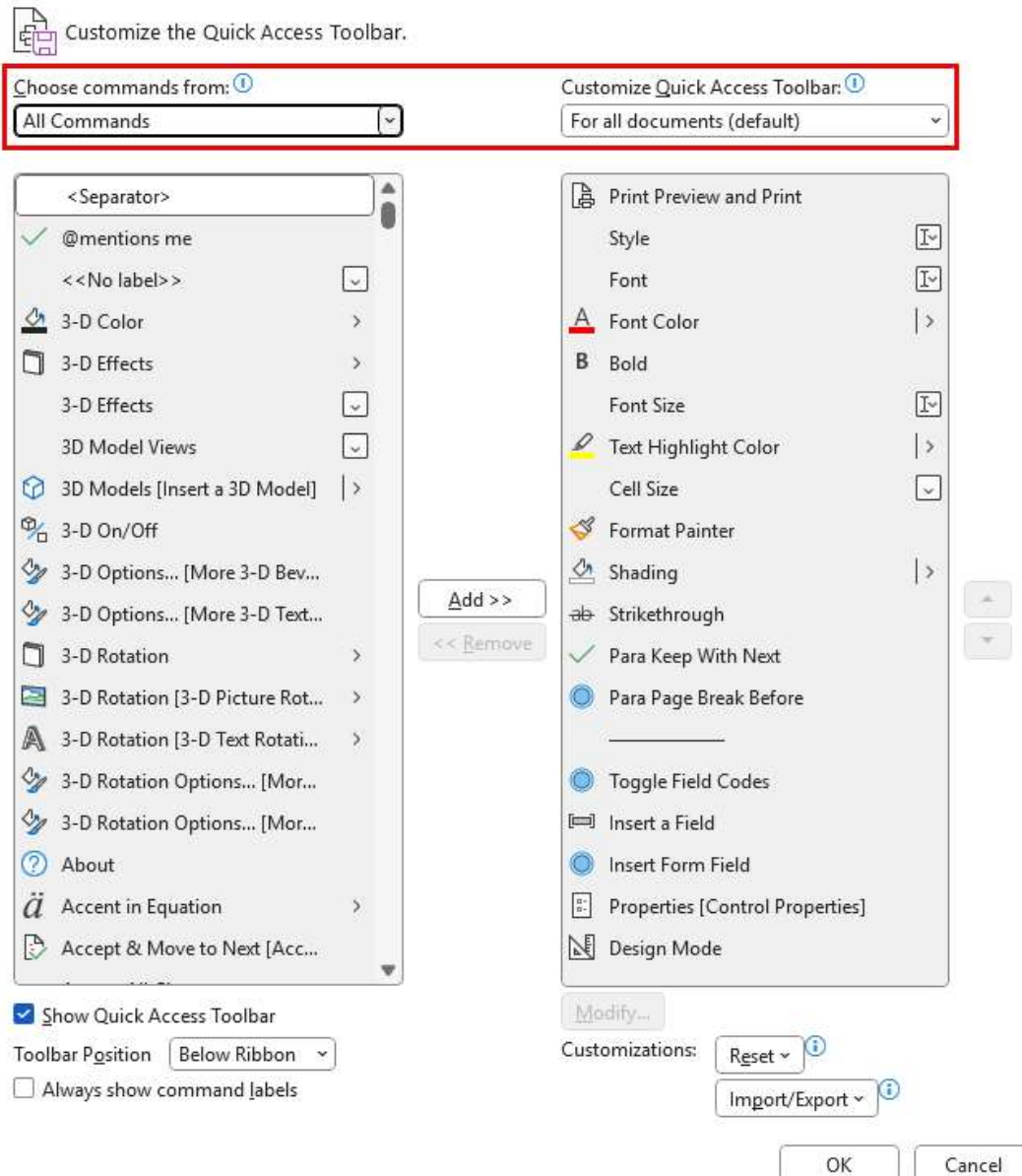
- ▶ have the Developer Tab enabled
 - ▶ have Design Mode turned on
 - ▶ reveal Paragraph Formatting
-

2.3 Quick Access Toolbar

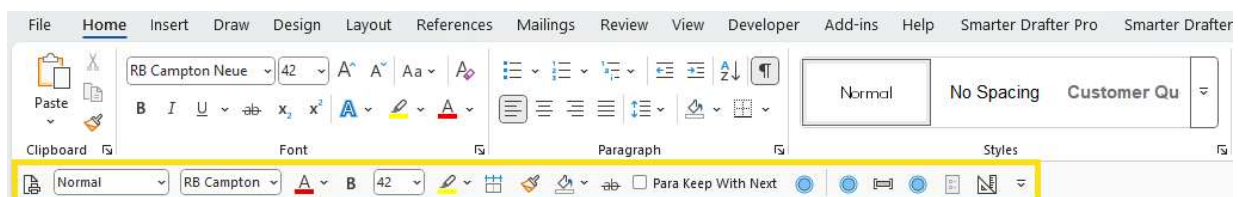
Set up your Quick Access Toolbar to include the most common document automation tools.

1. On the **Word Ribbon**, go to the **File** tab.
2. Click **Options**.
3. Click **Quick Access Toolbar**.
4. In **Choose commands from** column – select **All Commands**.
5. Select the relevant tools and click **Add**.
6. Use the up and down arrows to reorder your selections.
7. Click **OK**.

Examples of common features to include in the Quick Access Toolbar are:



The selected options will appear on the Word Ribbon, eg:



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2.4 Normal.dot and Styles

Ensure all automated documents are built using the organisation's Normal.dot and custom styles.

The Normal.dot template opens whenever you start Microsoft Word and it includes the default styles and customisations for your organisation's preferences and settings.

Your organisation should have (and if not, they should create) a custom Normal.dot in preparation for automation. This will ensure the consistency and integrity of both the automated and generated versions of documents.

The same Normal.dot is used by everyone in the organisation and is usually set to reload on each login from the main source and is stored for each individual user at:

C:\Users\user name\AppData\Roaming\Microsoft\Templates

The organisation's Normal.dot should have a single instance and a user should never alter their own version.

The person managing the Normal.dot should ensure it complies with the organisation's preferences and settings for:

- Font type and point size
- Paragraph spacing and alignment
- Page size and margins
- Preferred settings enabled/disabled as required
- Custom styles have been created
- Custom number and bullet lists have been created

Normal.doc: [Microsoft help article](#)

Custom styles: [Microsoft help article](#)

Custom lists: [Microsoft help article](#)

Note: If custom styles and lists haven't been created, this should be done before commencing automation.

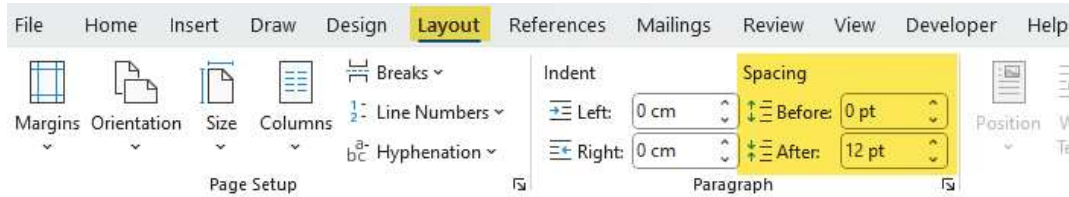
2.5 Avoid Using Empty Returns for Spacing

Use paragraph settings to create the spacing required rather than inserting empty carriage returns.

1. On the **Word Ribbon**, go to the **Layout tab**.
2. Go to the **Paragraph** group.
3. Adjust the **Before/After** settings.

The settings to apply will depend on the size of font you're using and how much of a gap you need.

EG: For 12 point font, 6pt is half a line and 12pt is a full line.



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2.6 Avoid Unnecessary Blank Pages at the End of a Document

Ensure you delete all empty returns at the end of a document to avoid unnecessary blank pages forming. Use the paragraph before/after settings per 2.5 above to adjust spacing.

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2.7 Soft Returns vs Hard Returns

Soft return: **Shift+Enter**

Hard return: **Enter**

Hard returns should be used wherever possible.

Soft returns should only be used where formatting has been applied and the formatting will only continue if a soft return is used. If a new number/bullet is not required, then a soft return will continue all other formatting without applying a new number/bullet (eg indents).

Soft returns should be avoided where possible. Using soft returns unnecessarily will adversely impact other formatting, especially keep-with-next settings.

2.8 Ensure Headings and Introductory Paragraphs Stay Connected to the First Subpara Below it

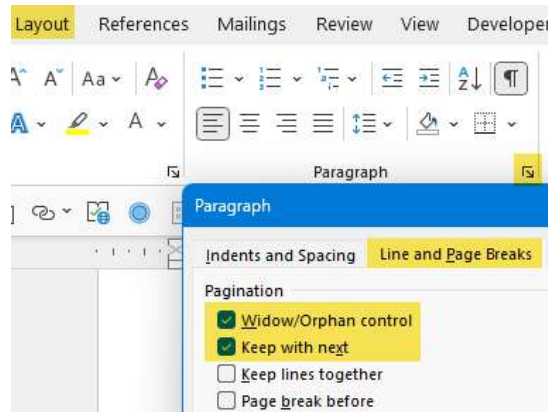
Depending on the answers provided by the filler and the corresponding text that is inserted into the generated document, headings and intro paragraphs in the template will move and may become disconnected to the text below it. To avoid a heading or intro paragraph from sitting at the bottom of the page while the text splits onto the next page, apply keep with next and Widow/Orphan controls to the heading or intro paragraph to ensure they move together.

Apply keep with next and Widow/Orphan control to all headings, subheadings and any paragraph that is introducing something (this would usually be a paragraph that ends with a colon).

When these settings are applied, a non-printing square character will appear in the margin to indicate a paragraph control has been applied:

- **THIS IS A HEADING** — apply keep with next so it stays with the next para. ¶
- **This is a subheading** — apply keep with next as it is also a heading that needs to stay with the next para. ¶
- 1. → This is a paragraph of text that is introducing a list — apply keep with next so it stays with the first item on the list. ¶
 - (a) → This is the first item of the list — you don't need to apply keep with next as this item will move with the subheading. ¶
 - (b) → This is the second item of the list that is introducing another list — apply keep with next so that it stays with the first item on the list. ¶
 - (i) → This is the first item of the list — you don't need to apply keep with next as this item will move with the introductory para. ¶

1. On the **Word Ribbon**, go to the **Layout** tab.
2. Go to the **Paragraph** group.
3. Click the **arrow** to expand the group options.
4. Click the **Line and Page Breaks** tab.
5. Tick **Widow/Orphan control**.
6. Tick **Keep with next**.
7. Click **OK**.

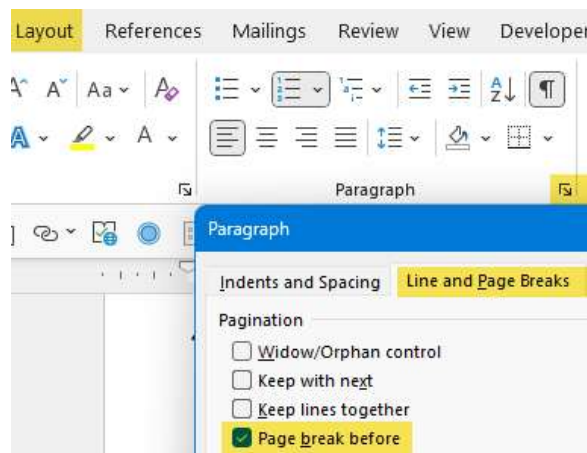


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2.9 Avoid Manual Page Breaks

Page breaks can take up room in your document that can unknowingly create an extra page. Also, it can sometimes make formatting the next paragraph difficult as it likes to carry the formatting from the paragraph above. Instead, use the Page Break Before setting.

1. On the **Word Ribbon**, go to the **Layout** tab.
2. Go to the **Paragraph** group.
3. Click the **arrow** to expand the group options.
4. Click the **Line and Page Breaks** tab.
5. Tick **Page Break Before**.
6. Click OK.

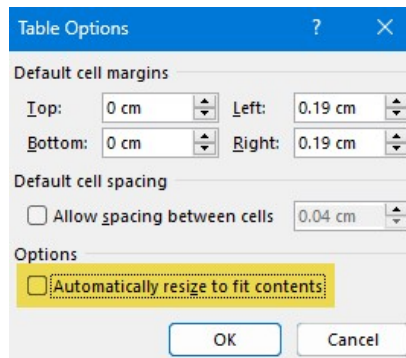


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2.10 Control the Size of Table Rows and Columns

Word has a default setting enabled that will automatically resize table columns and rows to suggest the best fit for your text. With automation, the amount of text the filler will enter is unknown so to ensure the integrity and aesthetics of the table, it is best to lock these settings so that you are in control of the table layout.

1. Highlight the whole table.
2. Right-click anywhere in the table.
3. Select **Table Properties**.
4. Click **Options**.
5. Untick **Automatically resize to fit contents**.
6. Click **OK**.

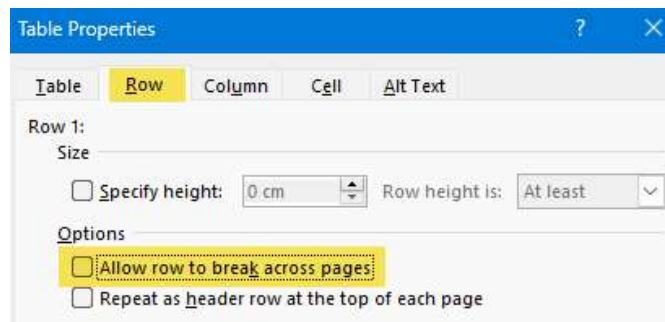


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2.11 Control Table Rows Breaking Across the Page

Word has a default setting enabled that will automatically allow table rows to break across the page. This will often make a mess of the table or make it difficult to review later. With automation, the amount of text the filler will enter and where a row will break is unknown so to ensure the integrity and aesthetics of the table, it is best to lock these settings so that you are in control of the table layout.

1. Highlight the whole table.
2. Right-click anywhere in the table.
3. Select **Table Properties**.
4. Click the **Row** tab.
5. Untick **Allow row to break across pages**.
6. Click OK.



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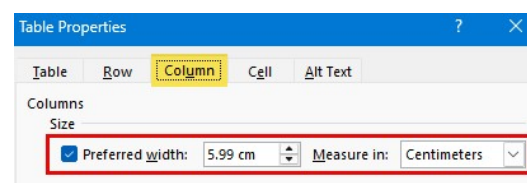
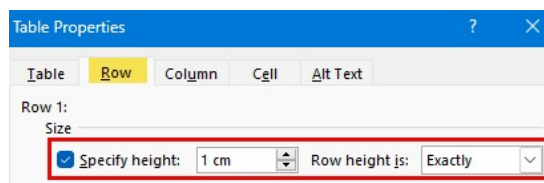
2.12 Set Table Row Height

When a table is inserted, Word applies the most flexible default settings. With automation, more control is required to specify how the table is to behave, in particular the height of rows where you may want – or specifically not want – the height of the row to automatically resize. To adjust the settings for table rows:

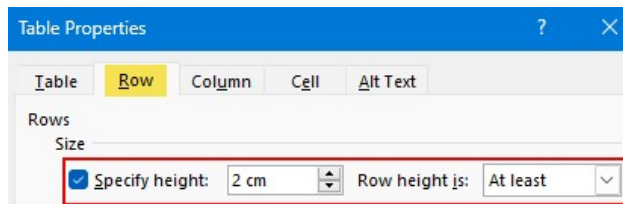
1. Highlight the whole table.
2. Right-click anywhere in the table.
3. Select **Table Properties**.
4. Click the **Row** tab.

If the row is to be a specific height, **tick the box**, set to **Exactly** and **insert the height measurement**.

If the column is to be a specific width, click the **Column** tab, **tick the box** and **insert the width measurement**.



If a row needs flexibility to expand, EG the length of an answer may be brief or lengthy, set the row height to **At Least** so that the row can appear small and not unnecessarily expand until additional text is entered and extra space is required.

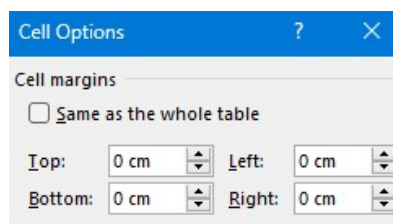


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2.13 Ensure Borderless Tables Align Cell Text with General Text Outside of the Table

Table cells have margins applied to pull text away from the borders. This is required when borders are turned on and you need some space in-between. When cell borders are turned off, text will appear slightly indented within the table and so the cell margins will need to be adjusted so that the text within the table aligns properly with the text outside of the table.

1. Highlight the whole table.
2. Right-click anywhere in the table.
3. Select **Table Properties**.
4. Click the **Cell** tab.
5. Click **Options**.
6. Untick **Same as the whole table**.
7. Set all margins to zero.
8. Click **OK**.



The example on the left is before the margins have been adjusted, showing the text misaligned and the line spacing differences.

The example on the right shows the clean adjusted layout.

Text outside of the table	Text outside of the table
Text inside the table	Text inside the table
Text outside of the table	Text outside of the table

Note: These settings can also be changed by highlighting the table and making the adjustments on the ruler.

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2.14 Keep Characters Together – Avoid Hyphenated Words and Important Words Separating Over Lines

Use non-breaking hyphens and non-breaking spaces to prevent text breaking.

Non-breaking hyphen: **ALT+SHIFT+Hyphen**

Non-breaking space: **CTRL+SHIFT+Space**

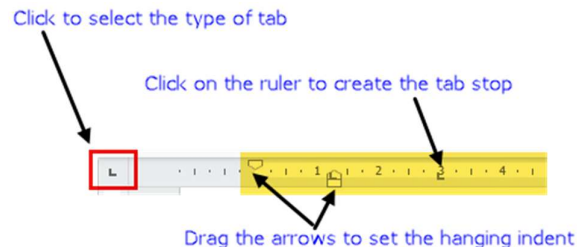
Use non-breaking spaces to control text moving together, EG for dates and intro words.

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2.15 Avoid Using Multiple Tab Characters – Set Tabs on the Ruler and Use Hanging Indents to Control Text Alignment

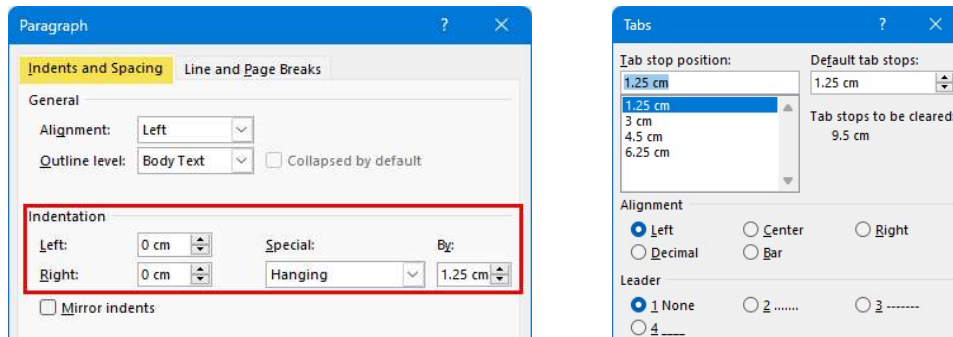
Use Tabs and set indents to control how text will behave across multiple lines.

You can set tabs and hanging indents directly on the ruler:



To turn the ruler on, go to the **View tab**. In the **Show** group, tick the **Ruler**.

The adjustments can also be made in paragraph and tab settings:



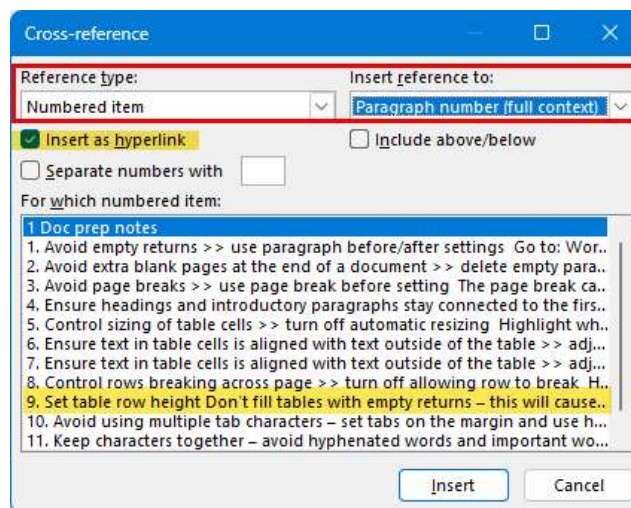
Ruler: [Microsoft help article](#)

Indents: [Microsoft help article](#)

2.16 Avoid Inserting Manual Cross-References

Insert cross-references as fields to ensure they update as adjustments are made to a document and paragraph numbering changes. This is imperative in automated documents where paragraphs will be included/excluded per the filler's answers, which will impact numbering and cross-references.

1. Place the cursor where the cross-reference is to be inserted.
2. On the **Word Ribbon**, go to the **Insert** tab.
3. Go to the **Links** group.
4. Click **Cross-reference**.
5. Apply the reference type and insert the reference to option.
6. Select the paragraph to reference.
7. Click **Insert**.

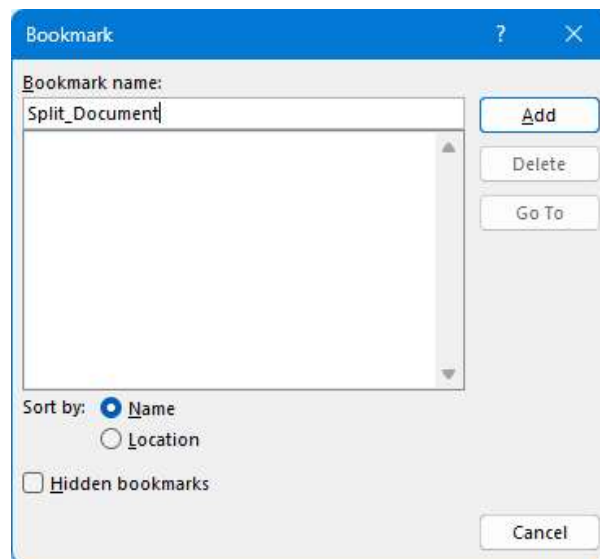


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2.17 Using Bookmarks

Bookmarks are placeholders and/or reference points, and can be used in Word commands and equations (sums).

1. Place the cursor where the bookmark is to be inserted.
2. On the **Word Ribbon**, go to the **Insert** tab.
3. Go to the **Links** group.
4. Click **Bookmark**.
5. Enter a bookmark name in Camel_Case.
6. Click **Add**.



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2.18 Hard Code to Restart Paragraph Numbering

Word may not follow numbering continue/restart instructions where multiple numbering lists are used in the document. To ensure Word complies with restarts, you may need to hardcode this with a field.

1. Place your cursor above the numbered list to be restarted.
2. Insert a Word field by pressing **CTRL+F9**.
3. Insert field code: `{ LISTNUM \I 1 \s 1 }`.

`{ LISTNUM \I 1 \s 1 }`

Note: You may need to toggle field codes on/off to see the code – press **ALT+F9**
Ensure the code is entered exactly as above, including spaces

Word may assign the line where the code was inserted as "1" so you may need to set the restart to 0. If this happens, alter the field code to: { LISTNUM \l1\s0 }.

{·LISTNUM·\l1·\s0·}

If you need to hide the code, set it to hidden text, size 1, white font and adjust the spacing so it can't be seen when generated and to reduce the chances of it being deleted.

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2.19 Code to Count Number of Pages

You may need to count the pages of a whole document OR the number of pages only within a section.

Word's automatic page numbering will default to count all pages of the document and the field code will appear as: { NUMPAGES * MERGEFORMAT }.

{·NUMPAGES·*·MERGEFORMAT·}

To set the code to count pages in a section, alter the field code to: { SECTIONPAGES * MERGEFORMAT }.

{·SECTIONPAGES·*·MERGEFORMAT·}

Note: You may need to toggle field codes on/off to see the code – press **ALT+F9**
Ensure the code is entered exactly as above, including spaces

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