Word for Research Writing I: Text and Structure

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1. The Graduate School Template

This document is a user's guide for the Graduate School's Word template for dissertations and theses. The template is backwards compatible to Word 2003, and Graduate School will continue to maintain and update the file for the foreseeable future. If you have suggestions or requests for updates to this file, please contact dteditor@nd.edu to submit your comments to the dissertation and thesis editor.

The Word template maintained by the Graduate School includes:

- Standardized document structure, including pagination aided by section breaks;
- A list of re-programmed native Word text styles and new styles designed to simplify text, figure, and table formatting; and
- Sample/placeholder text

1.1 Document structure

1.1.1 Beware of Section Breaks

Much of the initial structure in this template depends on the use of Section Breaks. Unlike Page Breaks, Section Breaks can be enforced, allowing you to format one part of the document independently of the other parts.

These breaks are usually hidden from view, but you can turn on a formatting view that will reveal elements such as page and section breaks, paragraph breaks, line wraps, tabs, and more. To **Show/Hide Formatting**, click the ¶ button on the Home tab, in the Paragraph block immediately to the left of the horizontal styles list.



Before you import any existing text or delete sections from the template, turn on the formatting view. To preserve the integrity of the template, make sure you **do not delete any existing Section Breaks**. These breaks should appear at the end of the document sections indicated below.

- Title page [section break]
- Copyright page [section break]
- Abstract [section break]
- Front matter [Roman numeral pages; section break]
- Introduction and/or main chapters

If any of the above section breaks are missing, click on the **Page Layout** tab, and select **Breaks**, just below the tab itself. Choose **Section Breaks-Next Page** to add the break.

1.1.2 Order of elements

The Notre Dame dissertation and thesis formatting guide specify the order of elements for the document. More information on these sections can be found in the Glossary.

Page	Required/Optional	Pagination
Title page	Required	Page I (hidden)
Copyright	Optional	Neither counted nor numbered
Abstract	Dissertation = required; master's thesis = optional	Neither counted nor numbered
Dedication	Optional	If included, page ii
Contents	Required	If a dedication exists, page iii
Figures	Required if 5 or more figures exist	Continue front matter pagination
Tables ¹	Required if 5 or more tables exist	Continue front matter pagination
Preface	Optional	Continue front matter pagination
Acknowledgments	Optional	Continue front matter pagination
Abbreviations/Symbols	Optional	Continue front matter pagination
Chapter 1	Required	Begins main text pagination at page 1
Appendix A ²	Optional	Continue main text pagination
Bibliography/References	Required if each chapter does not end with a references subheading	Continue main text pagination

 $^{^{1}}$ Additional lists can be added if the author and advisor think it useful — Schemes, Maps, Illustrations, Examples, Equations, and so on.

 $^{^{\}rm 2}$ Some disciplines may prefer to reverse the order of the Appendix chapters and Bibliography.

1.2 Navigating Text Styles

By default, new files in Word are based on the "Normal" template. You may have noticed a list of styles across the top that includes names like Normal, Heading 1, Heading 2, and so on. The Graduate School has reprogrammed many of the default styles and added several more to simplify the formatting process.

1.2.1 The Styles Pane

If you click on the Home tab in Word, you'll likely see a scrolling list of text styles in the Styles block to the right of the screen. If you click on the tiny pop-out button in the lower right corner of this block, you can open a full list of available styles that may be a little easier to navigate.

To display the Styles pane on a **Windows** computer:

- 1. Click the **Home** tab, if necessary.
- 2. In the **Styles** block, click the tiny "expand" arrow in the lower right corner of the group to open the Styles Pane.



To display the Styles pane on a Mac:

- 1. Click the **Home** tab, if necessary.
- 2. Find the scrolling list of styles toward the right of the document window, and click the Styles Pane button at the right.



1.2.2 Style types and usage

When viewing a text style in the Styles Pane, you can determine the type of style-based on icon to the right of the name, usually \P , \mathbf{a} , or $\P \mathbf{a}$.

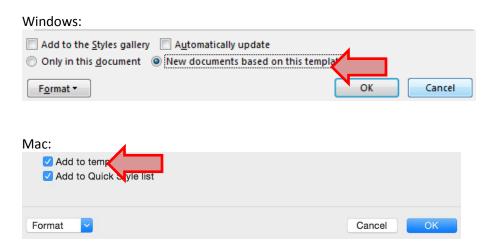
 Indicates a paragraph-level style. To apply this type of style, click your mouse inside a paragraph, then click on the style name to apply those settings to the entire paragraph. You do not need to highlight text unless you're applying a style to multiple paragraphs. These styles can control spacing, alignment, indent, tabs, font color, font size, font decoration, borders, etc.

- a indicates a character-level style. You must highlight the exact text you wish to affect, then click the style name to apply. These control only font-level settings: font, color, size, bold, italics, underline, super/subscript, etc.
- ¶a indicates an advanced "linked paragraph/character" style, which allows for layering a (e.g., overlaying "Figure title" on top of "Figure caption").

1.2.3 Modifying text styles

Styles are ready to apply as soon as you open a new document based on a template. If you wish to modify the settings on a style:

- 1. Open the Styles Pane to find the desired style name.
- 2. Click on the style type icon $(\P, \underline{a}, \text{ or } \P \underline{a})$.
- 3. Select **Modify** from the menu, and adjust the settings accordingly.
- 4. If you wish to save the modifications back to the source template, click the "New documents based on this template" option (Windows) or "Add to template" option (Mac) at the bottom of the dialogue window.

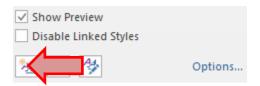


5. The next time you save the document, Word will ask you to confirm that you wish to save your modifications to the source template. Click OK to confirm.

1.2.4 Creating a new text style

In addition to modifying existing styles, you can create your own styles, and choose whether to add them to a template.

- 1. Open the Styles Pane, as above.
- 2. On the **PC**, find three buttons at the very bottom of the Pane. Click on the **New Style** button at the bottom-left of the pane.



On a Mac, look for the New Style button at the top of the Style Pane, just below the current style display.



- 3. Enter a name and select a style type (Paragraph, Character, or Linked).
- 4. If you want the style to inherit settings from an existing style, set the "Style based on" option. Tip: Setting this to "Normal" will allow the new style to inherit any baseline changes to your default paragraph text, such as blanket updates to the preferred font in use.
- 5. If you are creating a paragraph style, you can also define a default style to apply to the next paragraph or object after the paragraph (for example, if you're creating a style to apply to inline figures, the very next style in use should be "Figure caption").
- 6. You can dig a little deeper into the styles to affect settings like fonts, borders, and so on by using the format button at the lower left, depending on your style type.



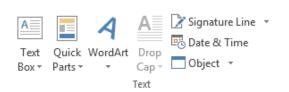
7. Again, if you wish to save the modifications back to the source template, click "new documents based on this template" near the OK button.

2. Adding Content

As mentioned previously, to start using your new template-based file, you can just begin writing directly in the file. To bring existing content into the new file, you have three primary options: use the Insert function to import text from an external file, use the copy and paste method, or link the existing work-in-progress back to the source template to update its style classes. The most reliable of these is options is to open a new document based on the template, and use the Insert function.

2.1 Inserting a text file

- 1. Open a new document based on the dt_template.3
- 2. Click on the **Insert tab** on the main ribbon menu. At the far right, you should see a "Text" block of menu options:



To insert a text file on the Mac, you can also open the top Insert menu and click on "File."

- 3. Click on the tiny "down" arrow to the right of the word "Object" and then choose "Text from file."
- 4. Find the chapter file you want to insert into the composite document in this case, a chapter you've already started and click on "Insert."

If you have applied any of the standard heading styles (Heading 1, Heading 2, etc.) in your original chapter file, they will be updated to match the template styles when you insert the text.

2.2 Section breaks vs. Page breaks

Much of the formatting for this particular document depends on the use of Section breaks. Unlike Page breaks, Section breaks can be enforced, and allow you to format one section of the document independently of the other sections. In this document, we will insert Section breaks between areas of the document that will require different headers, footers, or overall page structure.

- 1. Turn on your formatting view. On the Home tab, click the ¶ character just to the left of the horizontal styles list.
- 2. The dissertation should include a minimum of 3 section breaks:
 - Bottom of the title page

³ If you right-click on the template file and choose "Open," you will edit the template itself. If you double-click on the downloaded template file, you will create a new document based on the template, usually called "Document 1" or a similar name by default.

- Bottom of the copyright statement (optional page)
- Bottom of the abstract
- Bottom of the last page of the front matter (just before the main chapters begin
- If any section breaks are missing, click on the Page Layout tab, and select Breaks, just below the tab itself. Choose Section Breaks-Next Page to add the break.
- 4. **Save** the file.

2.3 Apply your defined styles

2.3.1 Primary styles that drive the table of contents

Word will use some styles to identify what belongs on the table of contents, per the Graduate School's settings.

- Chapter Title (on ToC, not numbered): Major sections that should be listed on the table of contents but do not include chapter numbers (i.e. list of figures, list of tables, acknowledgments, bibliography)
- Heading 1: Numbered chapter titles
- Heading 2: Major headings in the numbered chapters
- Heading 3 +: Secondary headings in the numbered chapters
- Appendix heading 1: Lettered appendix titles
- Appendix heading 2: Major headings in the appendices
- Appendix heading 3+: Secondary headings in the appendices

2.3.2 Other useful styles

- Bibliography
- Block quote
- Centered text (title page)
- List Bullet
- List Number
- Normal
- Normal (no indent)
- Verse

2.3.3 Tips for style usage

Numbered chapters, appendix titles, and table titles should all begin with just the label and number alone on the front line. Do not press Enter to begin the second line of the element, though — that will create a new paragraph of that style type.

To wrap text to a second line, use SHIFT + ENTER, as in the example below.

The Chapter
Title (no TOC) and
Chapter Title (on
Toc, not numbered)
styles are similar, but
the Chapter Title (no
TOC) style is used for
titles that will not be
included in the TOC.

Chapter Title (on Toc, not numbered) style is used for titles that will be included in the TOC.

1. Apply the Chapter 1: **Heading 1** style to your main-text chapter title; you'll see that Word sets the title in all-capitals, centered, and adds the chapter label and number.

• CHAPTER 1: INTRODUCTION¶

1.1 ·Overview¶

This-is-an-overview-of-the-introduction.-In-here,-I-will-use-many,-many-buzzwords-and-other-legalistic-types-of-terms,-mostly-beginning-on-the-expounding-of-the-holistic-and-

2. Now add a **Soft Return**, or **Line Wrap** (**Shift+Enter**) between the chapter number and the main title to wrap the title to a new line without creating a new instance of Heading 1.

CHAPTER 1: •-'
INTRODUCTION¶

1.1 ·Overview¶

This-is-an-overview-of-the-introduction.-In-here,-I-will-use-many,-many-buzzwords-and-other-legalistic-types-of-terms,-mostly-beginning-on-the-expounding-of-the-holistic-and-

If your major chapter/section titles do not appear to include automatic spacing above the title, see section 4.1.

2.3.4 Footnote separator lines

Word by default will insert a line above the footnotes section on each page. There will usually be a short line for footnotes that originate on the same page, and a longer line the width of the text column to indicate that a footnote originated on, or continues from, a previous page.

The footnote separators should align with the left text margin. If they appear to be indented, you can realign the separators by following these steps.

- Change to Draft view (View tab > Draft)
- 2. Click References (tab) > Show Notes

- 3. From Notes Pane Footnotes dropdown, select Footnote Separator
- 4. Press **Backspace** once to delete the tab
- 5. Select Footnote Continuation Separator
- 6. Press Backspace once
- 7. Change to Print Layout (View tab > Print Layout

You should see the separator lines now begin at the left margin, as desired.

2.4 Headers and Footers

The page numbers and abstract header should be preset in the template — as long as the section breaks remain intact. If you accidentally delete one, this is how you reset the correct options.

2.4.1 Abstract, header and footer

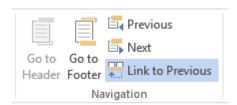
In the template, these settings are already in place; if you accidentally delete one of the Section Breaks before or after the abstract, this is how you reinstate the break and the special settings that apply only to the abstract.

- 1. Turn on the formatting view on the Home tab so you can see where the missing Section Break needs to be reinserted.
- 2. Navigate to the first page of the Abstract and double-click anywhere in the header to open the **Header & Footer Tools** → **Design** menu nav.

At the far right of the header space, you should see a tab that says *Same as Previous*:.



This means the *Link to Previous* option is active in the **Header & Footer Tools** tab:



- 3. Click the highlighted **Link to Previous** mechanism to "break the link" to the previous section (**Header & Footer Tools** → **Design** → **Navigation** block).
- 4. You'll need to break this Link to Previous setting multiple times:
 - Header, Section A (the abstract, in this example)

- o Footer, Section A
- Header, Section B (the dedication page, in this example)
- Footer, Section B

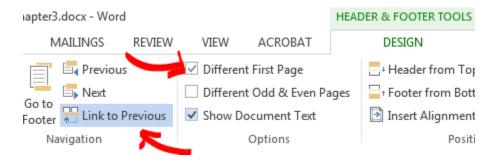
2.4.2 Different first page (within a Section)

To complicate matters further, let's say we want to have the very first page of the section to have a different header than the rest of that section. This happens in the abstract.

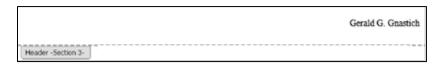
The first page of the abstract contains the abstract title and the author name. Subsequent pages of the abstract do not include the author's name, so we need to add the name into a header — but only on the secondary abstract pages.

Again, this is already set in the posted template, but you may need to re-create it if you accidentally delete a Section Break.

- 1. With your cursor in the header of the abstract, navigate to Header & Footer Tools and look for the Navigation and Options blocks.
- Check the box that allows for a Different First Page, then turn off Link to Previous (as above) in both the first page header and footer, and the secondary header and footer within the abstract.



3. With your cursor in the Header of the secondary abstract section, type in the author's name (i.e., your name as it appears on the title page) at the right margin, and apply the **Header** style, if necessary.



4. Click the **Close Header and Footer** button to close the Header and Footer view (**Header & Footer Tools > Design** tab).



Or, simply double-click somewhere on the main body of the document to exit the Header & Footer Tools.

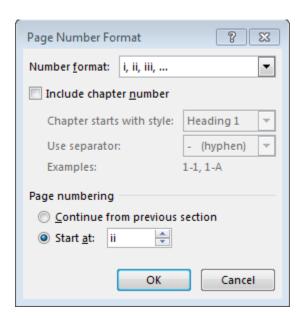
The header should appear only on the second page of the abstract.

5. Save the file.

2.4.3 Front matter pagination

The first page after the abstract should begin pagination with page ii. Again, this structure is already in place in the posted template, but you may need to recreate it if the Section Break at the end of the abstract goes missing.

- 1. Navigate back to the page immediately following the abstract in this case, usually the dedication and click somewhere on the text of that page.
- 2. Double-click at the bottom of the page to enter the **Footer** area.
- 3. Make sure the **Link to Previous** button is *not* selected in the footer of the Dedication page.
- 4. Click the **Page Number** button from the Header & Footer group.
- 5. Select **Current Position** from the drop-down menu and select **Plain Number** (first option). A page number is inserted.
- 6. Click on **Page Number** from the Header & Footer group and choose **Format Page Numbers**.
- 7. In the Page Number Format dialog box:
 - Number format = i, ii, iii...
 - Page numbering, Start at: = ii



If your page numbers are indented, or using the wrong font, you can modify the Footer and Page Number styles to correct the issue throughout the entire document.

- 8. Click OK.
- 9. Format the remaining front matter page numbers using the **Continue from Previous Section** option if necessary.

2.4.4 Main text pagination

The first page of your main text should be page 1. If the Section Break at the end of the front matter has gone missing, you may need to recreate the chapter footer settings.

- 1. Repeat steps 1–6 above.
- 2. In the Page Number Format dialog box:
 - Number format = 1, 2, 3...
 - o Page numbering, Start at: = 1
- 3. Click OK.
- 4. Format the remaining main body page numbers using the **Continue from Previous Section** option if necessary.
- 5. Once all the page numbers are formatted properly, click the **Close Header** and Footer button (Header & Footer Tools > Design tab).
- 6. Save the file.

Remember:

- Front matter format = i, ii, iii The title page is counted, but not numbered, so this section should number consecutively from the Dedication (beginning with page ii) until the end of the front matter.
- Body of paper = 1, 2, 3, ... Beginning with the Introduction/Chapter 1, the main body should number consecutively beginning with page 1.

2.5 Table of Contents (ToC)

2.5.1 Creating the Contents page

The table of contents appears after the dedication page or after the abstract, if the dedication page is not included. Like the pagination and abstract header, these settings should already be in place when you download the template. If it does not appear to be updating correctly, this is how you rebuild the table. (See the next page for a rundown of the applied styles for which the ToC will be searching.

- 1. Click the cursor in the table of contents; the list should highlight in gray.
- 2. Right-click on the highlighted text, and select **Edit Field**.

The Contents list is entirely driven by the use of styles; if something is on your list that should not be (or vice versa), always check the style used to see whether it's one that populates the Contents.

- 3. Click the **Table of Contents** button to edit the settings.
- 4. On the Table of Contents tab
 - Check Show page numbers
 - o Check Right align page numbers
 - o Make sure that the Use Hyperlinks box is unchecked
 - o Tab leader = dot (.....) is selected.



- 5. If necessary, change the *Formats* setting to **From Template**.
- 6. Click the **Options** button. The Table of Contents Options dialog box opens.



7. In this dialog box, you can choose which styles are included in the Table of Contents and which level they are. Add the level number, if necessary. Make sure the following are the only styles chosen. Remove any from the dialog box that are not included in the list below.

Style Name	Level
Appendix heading 1	1
Appendix heading 2	2
Appendix heading 3	3
Chapter Title (on Toc, not numbered)	1
Heading 1	1
Heading 2	2
Heading 3	3

The level of a style determines how it will appear in the hierarchy of the table of contents.

- 8. Click **OK** to close the Table of Contents **Options** dialog box.
- 9. Click **OK** to generate the Table of Contents.

2.5.2 Updating the Contents page

Once your Table of Contents is in place, you can refresh the list periodically as you add more text and/or headings to your document.

- 1. Right-click anywhere on the Table of Contents.
- 2. From the pop-up menu, choose "Update field".

You can tell whether a piece of text is a Wordgenerated field, by right-clicking on the text. Field text will highlight in gray.

- 3. Choose the appropriate action from the two options:
 - Update page numbers only: This updates only page numbers. Most useful when you've only expanded the main paragraph text or added other elements (new figures, etc.) that affect the pagination but do not appear on this table.
 - Update entire table: This option tells Word to re-examine the
 document and re-import any new or existing entries to the list. Most
 useful if you've added a new chapter title or subheading, or if you're
 correcting a misspelling or capitalization error in a title.
- 4. Click **OK** to begin the update.
- 5. Save the file.

You can make minor modifications directly to the Table of Contents (such as correcting typos or adding line wraps so an entry doesn't run into its page number), but these will be erased the next time you do a full update of the entire table.

!!! Important! Remember that the Table of Contents always imports your chapter and subheading titles exactly as they are physically typed — not as they appear with a style mask applied. (This applies to the lists of Figures and Tables, too.)

3. Working with Cross-References

If you use styles, inserted captions, or automatic numbering of any kind, you can use Word to keep track of your in-text references to these items, as well. For example, let's say you want to create a linked reference to heading 2.1. You can manually type the phrase "See section 2.1" in the main text, but if you insert a new heading before the current 2.1, you'll need to find every manually typed reference to heading 2.1 and update the number. Rather than searching the text for outdated references, let Word do the work for you.

3.1 Adding a cross-reference to a heading, equation, or footnote

Since we've asked Word to auto-number our titles and headings (for example), we can use that function to create an in-text cross-reference.

- 1. Place your cursor where you want to insert a reference to a heading, equation, note, or other numbered item.
- 2. Go to the **References** tab and choose **Cross-reference** from the **Captions** block.
- 3. Under Reference type, change the setting to "Heading".
- 4. Under **Insert reference to**, change the setting to **"Only label and number"**. If that's all you wish to insert. (Available options may vary depending on your version of Word.)
- 5. Select the target heading for the reference.
- 6. Click the Insert button.

Note that a cross reference appears to be just like the rest of your paragraph until you click on it. Similar to the table of contents and the list of figures, these inserted references are Microsoft Word-generated fields.

Using the steps above, you can insert linked references to tables, schemes, equations, subheadings, or any other numbered item into your main paragraph text.

3.2 Updating cross-references

If you only have a small handful of cross-references, you can update them manually by right-clicking on the reference embedded in your text, and choosing "Update field".

Alternatively, if you have a lot of references in your text, you may not want to update each one in turn. In this case, you can update all of the links in your document at once.

- 1. Select all text in the document by pressing CTRL + A or navigating to the **Home** tab, and choosing **Editing**, then **Select**, and **Select All**.
- 2. Right-click on any Word-generated field in the document (a cross reference, figure or table number, table of contents, list of figures, etc.).
- 3. Choose "Update field".

This begins a mass link update in your document. Word will progress through all of your generated fields, from the Table of Contents onward, and update every field it encounters. If you have front matter lists, you will need to specify whether you're updating only page numbers or the entire list, just as you would when manually updating these fields.

4. Troubleshooting

4.1 Chapter titles are missing the 2" top margin

We don't know what causes this glitch to occur in some chapters and not others. There is a work-around, but it requires modifying the Heading 1 style's paragraph settings to remove the automatic page break, and just entering one manually before each numbered chapter.

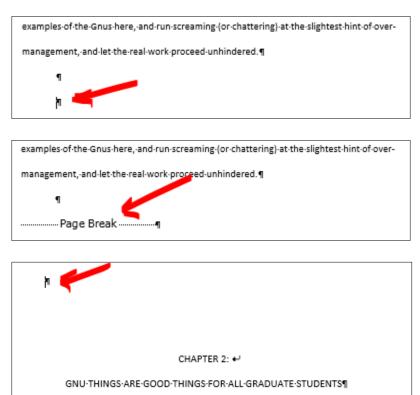
Possible styles affected: Chapter Title (on TOC, not numbered); Heading 1; and Appendix heading 1.

- 1. On the Home tab, use the **Show/Hide Formatting** option to make page and section breaks visible as in section 1.1.1.
- In the Style Pane, hover over affected style (for example, Heading 1) click the drop-down menu arrow to the right of the style name, and select Modify:
- Select Format and then Paragraph from the lower left of the Modify Style screen:

- 4. On the **Line and Page Breaks** tab, un-check the "Page breaks before" box. This will turn off the setting that causes chapter titles to automatically begin at the top of a new page.
- 5. Click **OK** to exit the Paragraph dialogue. Back on the Modify Style screen, select the option to save this change to the template (i.e., "all documents based on this template").



- 6. Click **OK** to return to your document.
- 7. Find the first chapter title controlled by the style you just modified. At the end of the last page in the previous chapter, add a blank line, leave your cursor at the second line, and then enter a manual page break (CTRL + ENTER):



This will both insert a page break and a blank line at the top of the chapter title page, forcing the title to display the built-in spacing above.

8. Repeat step 6 for all affected titles using the modified style.

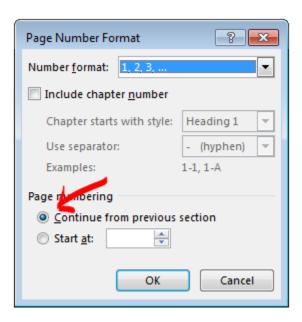
4.2 Page numbers start over at 1

If you're using section breaks (see section 1.1.1) for any of the following reasons in the main text or appendices:

- Landscape pages
- Continued tables
- Restarting footnotes at 1 in each chapter

be sure to check the pagination around those breaks periodically — Word sometimes restarts the numbering at 1 on the first page of a new section.

Refer to the steps outlined in section 2.4.3, but this time make sure the **Page numbering** option is set to "Continue from previous section" rather than "Start at: ..."



This will prompt the incremental page numbering mechanism to re-connect with the previous section, allowing the page numbers to update automatically if you add new content above the break. Adjusting the numbering mechanism itself will not affect the placement or formatting of the page numbers if the section break is being used to format page numbers differently (e.g., going from a landscape page to a portrait page).

5. Glossary

5.1 Document sections

Title page First page of the dissertation or thesis; includes the document title, degree, author name, director name, program, and formal submission month and year

Copyright page...... Optional statement declaring copyright, public domain, or creative commons status.

Abstract Required for all dissertations and some master's theses. A condensed high-level synopsis of the work. Dedication...... Optional page including a brief dedication to an influential person or entity who inspired or helped to shape the author or their work Contents Also referred to as a Table of Contents, this section lists all major chapter, appendix, and section titles that appear following the Contents itself. Chapter-level elements are required. The template is built to recognize subheadings in numbered chapters and appendices and import those, as well (default import up to Heading 5). Preface..... Optional section used to convey editorial method and other information about the writing of this document. Acknowledgments...... Optional section used to recognize the people, institutions, and often funding sources who supported the author's research. Main text Introduction, main chapters, and conclusion if applicable. May be divided into Parts, or groups of chapters. Bibliography...... Also called References or Works Cited. A list of sources, either alphabetical by author name or a list numbered in order of reference. This section should not include commentary on the content of the chapters or any other notes besides reference sources. Optional if the author has ended each chapter or appendix with a References subheading.

5.2 Document structure

Section breaks...... A "Next Page Section Break" begins new content at the top of the next page. A "Continuous Section Break" allows the author to begin the next section of content on the same page. Both can be used to treat different areas of the document independently, but to do so the author must first go into the Header and Footer to break the Link to Previous sections. If you see a tag in either the Header or Footer that says "Same As Previous" the link is still active.