

Guide to the Microsoft Word Template for Theses and Dissertations

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How to Download and Open Template File

The new Word template is saved as a **.dotx** file, which means you can download it to your computer as a template. Typically, your custom templates, such as this ETD template, will automatically save in a folder for “**Custom Office Templates.**” You can create many documents based on this template. These instructions will show you how to download the template correctly and create multiple documents from it – without altering the template itself.

Downloading and Saving the Template

1. Download the template from the Graduate School’s [Thesis & Dissertation page](#).
2. Save the file to your **Custom Office Templates** folder, which is on all Windows computers. If you are using **macOS**, the template is saved in **/Users/username/Library/Group Containers/UBF8T346G9.Office/User Content/Templates** (unless you select a different location).

Creating a Document from the Template

1. Go to the template folder and **double-click on the file**. This step is very important because it will create a brand-new document from the template.
2. When the file opens in Word, go to **Save As**.
3. Create a title and save the document as a **.docx** file in a folder of your choice. Click **Save**.
4. *Note: when naming a file, do not have any spaces in the title (e.g., “my thesis.docx.”) Instead, you need to use dashes or underscores (e.g., “my-thesis.docx”) to ensure the file name does not have any errors when loading or when transferred to another computer.*
5. Now you’re ready to write! Follow these steps to create a second, third, etc. document from the template if you need to.

How to Add a New Chapter or Major Section

Steps: Use Section Breaks

Section breaks are what you must use to start a new chapter or major section. If you need to start a new chapter, appendix, etc., then follow these steps:

1. Put your cursor at the end of the preceding section.
2. Go to the **Layout** tab, then click on **Breaks**. This should bring you to a drop menu.
3. Under “**Section Breaks,**” click on **Next page**.
4. Now you have a new section and can begin a new chapter.

5. *Note: Use “Major Headings” as it is set up in the template to type the heading for your new major section. This heading style in the new template is already set to add the 2-inch top margin so you don’t have to.*

A Word on Page Breaks

Often, people confuse page breaks with section breaks. *Page breaks only start a new page; they have no impact on the formatting.* This function is useful if you need to move a table title onto the next page or have a widow/orphan situation with your text. ***Do NOT use “page breaks” to start a new chapter or major section.***

Heading Styles: Descriptions

Pre-set headings allow users to create bookmarks within a document, which enable easier navigation and render the document accessible and usable with screen readers. This template has several pre-set heading styles that meet the Graduate School’s formatting standards and adhere to [ADA requirements for digital accessibility](#).

There are many heading styles that are pre-set in the new template. Read through the descriptions below to learn how to use them properly. These heading styles enable your document to:

1. Have the 2-inch top margin on the first page automatically – without multiple section breaks within the chapter;
2. Insert a self-populating table of contents, list of tables, and list of figures; and
3. Have bookmarks for navigation and accessibility.

“Heading 1, ETD Title”

This heading is **only** for the title of your thesis or dissertation. The title on the title page is already set to this style. Using this heading style for your ETD title will also ensure accessibility by giving your document a title that can be read by screen readers.

“Heading 2, Major Headings”

Truncated as “Major Headings,” this style should be used for **all major headings**. The [formatting guide](#) has a complete list of major headings on pages 19 and 24. This heading is currently set to small-caps so that, regardless of how you type the text, the heading will appear in the document in small-caps automatically. It also has an invisible paragraph that provides the page with a 2-inch top margin. *For the 2-inch top margin to appear properly, however, you need to use a **section break** to start each new chapter.* The template currently has section breaks for each chapter already, but you will need to add another section break if you need additional chapters.

The table of contents is automatically set to show all iterations of “Heading 2, Major Headings” and “Heading 3, Subheadings” (see below) in the document as entries. To update the table of contents’ entries, all you must do is alter your major headings, then update your table of contents. See the [“How to Edit the Table of Contents”](#) section of this guide for more information.

“Heading 3, Subheadings”

Heading 3, Subheadings is for first-level subheadings in your chapters. The Graduate School only allows students to display the first level of subheadings in the table of contents (you are allowed to have more levels in the body of the document; they just cannot be entries in the table of contents). Use this style if you want to include the first level of subheadings as entries in the table of contents.

“Table of Contents (Heading)”

There is a special heading just for the table of contents so that the heading conforms to the established major heading style, has the invisible paragraph above the heading for the 2-inch top margin, and does *not* appear in the table of contents. Remember: the table of contents cannot be an entry in the table of contents. If you change the style for the major headings, be sure to change this heading style also to match the established major heading style.

“Table Titles”

This style is only for table titles. When you use it for your table titles, you will be able to have a self-populating list of tables. Note that the list of tables can only work if you use the Table Titles heading style for your table titles.

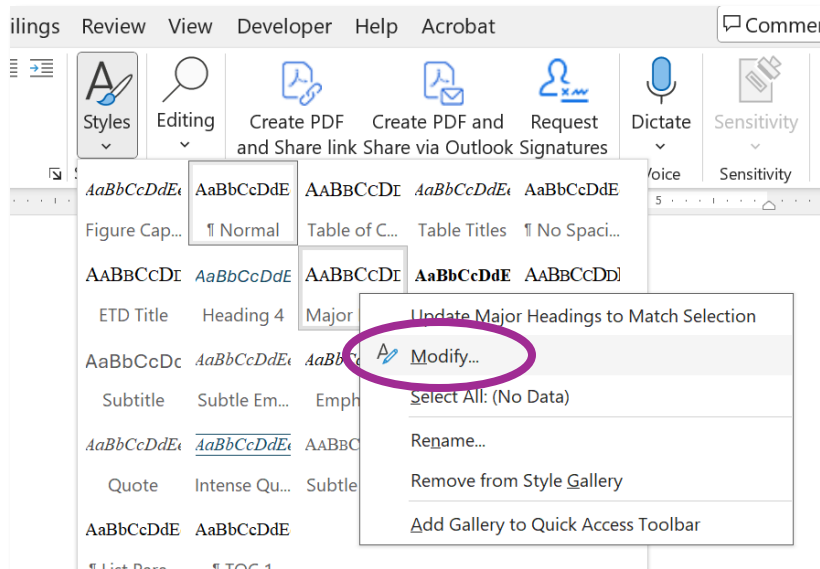
“Figure Captions”

This style is only for figure captions. Just as with the Table Titles style, the Figure Captions style enables the list of figures to be self-populating. Type each figure number and caption in the Figure Captions style.

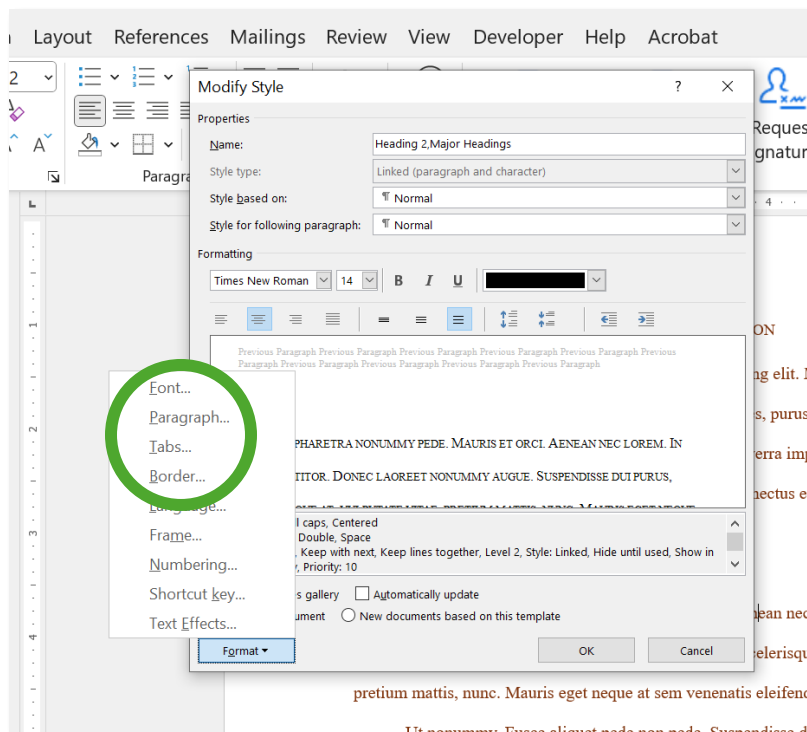
Heading Styles: How to Edit Them

If you wish to use a different style for your headings than the pre-set ones, then you have the option to modify the styles. To do so, follow these steps:

1. Go to the **Styles** menu in the **Home** ribbon and right-click on the heading style you wish to change. For instance, if you want to change your major heading style, right-click on “Major Headings.”
2. Click on **Modify**.



3. From there, you will see another menu. In the bottom left-hand corner is another drop-menu called **Format**. Click on that and choose from the drop-menu options. You can click on **Font** to make changes to the font, such as color, size, and placement. You can click **Paragraph** to make changes to the spacing.
4. *Note: Remember that all headings and subheadings must be double spaced. All major headings must be centered.*



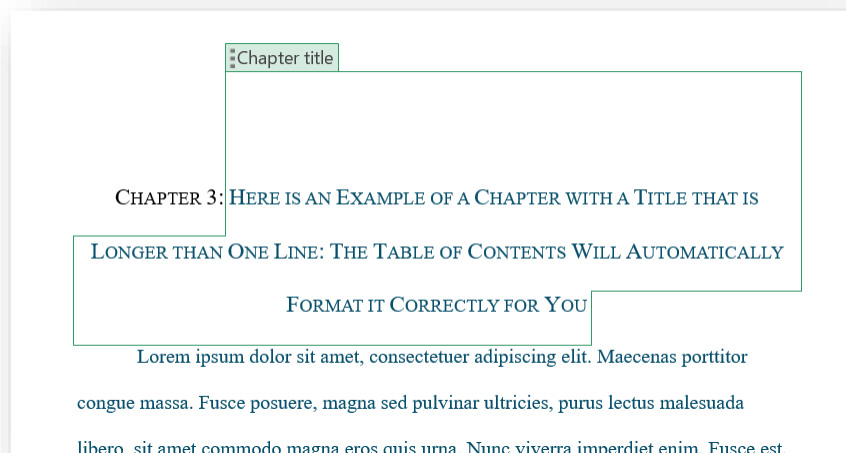
5. After you make these changes, click **Ok**. This will save your changes.
6. Word will now automatically update all headings at the specific level (e.g., “Heading 2, Major Headings” or “Table Titles”) with the new style you created.
7. Follow these steps to change any of the heading styles.

How to Edit the Table of Contents

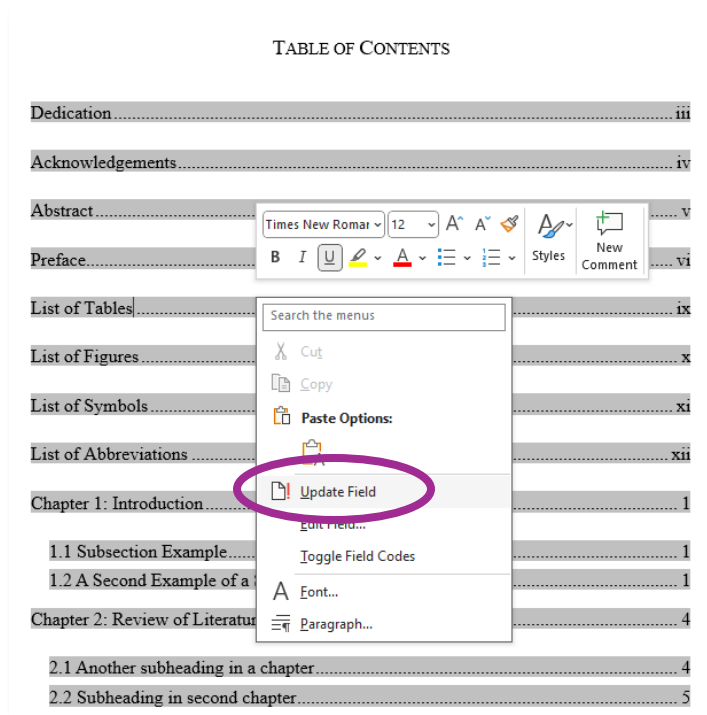
In this new template, the table of contents is already set up for you. You do not have to format any part of it, including spacing and margins. If you make any changes to the existing headings, such as altering a chapter title or deleting an appendix, then you will need to update the table of contents. Likewise, if you add any more major sections, such as a new chapter, then you will need to put the major section titles in **Major Headings**. This will ensure that your sections will appear in the table of contents and be formatted properly. *Remember: to change entries in the table of contents, you must alter the headings in the document; do not try to type in the table of contents itself.*

Update the Table of Contents

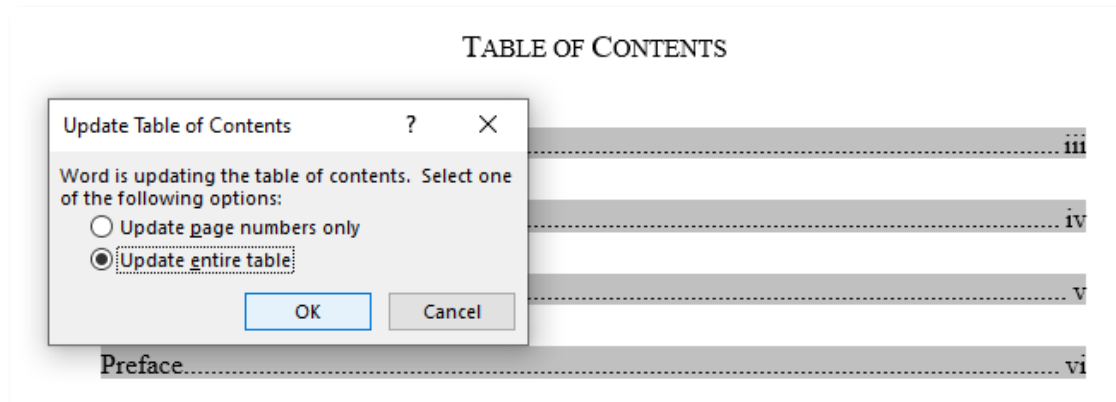
1. First, make any necessary changes to the headings, content, etc. Be sure to use **Heading 2, Major Headings** for major headings and **Heading 3, Subheadings** for first-level subheadings. You can type the title you wish to have for the chapter, appendix, etc. in the appropriate space. There are boxes throughout the document that instruct you on how to change the content.



2. After making these changes, put the cursor anywhere in the current table of contents, then right click. A menu should appear. Click **Update Field**.



- Next, a menu will pop up with two choices: Update the page numbers only OR update the entire table. If you have added new major sections and/or changed any major section titles, click **Update entire table**. If you made simple revisions and only need to update the page numbers click **Update page numbers only**.



- The table of contents will update automatically!

List of Tables and List of Figures

Create Table Titles and Figure Captions

The template has pre-set styles for table titles and figure captions called “Table Titles” and “Figure Captions,” respectively. Write any table titles in the “Table Titles” style; write any figure captions in the “Figure Captions” style.

Updating the List of Tables and List of Figures

The list of tables and list of figures are assembled in the exact same way as the table of contents. What this means is that the list of tables is set only to include text written in the “Table Titles” style, and the list of figures is set to include text written in the “Figure Captions” style.

You will update each list the *exact same way that you [update the table of contents](#)*. If Word takes you to the table of contents and asks if you want to “remove the table,” click **NO**. This way, Word will understand that you want to update a different list and not the table of contents.

Inserting Content: Tips

- Do not copy/paste your entire thesis or dissertation into the template all at once. Instead, add the content section by section.
- The “filler text” is in a dark blue color, and it can be deleted *after* you add your own content. You can also change the font color later.
- **Use section breaks** to create new chapters, appendices, etc. **DO NOT USE “PAGE BREAKS.”**

Changing the Default Font: 2 Steps

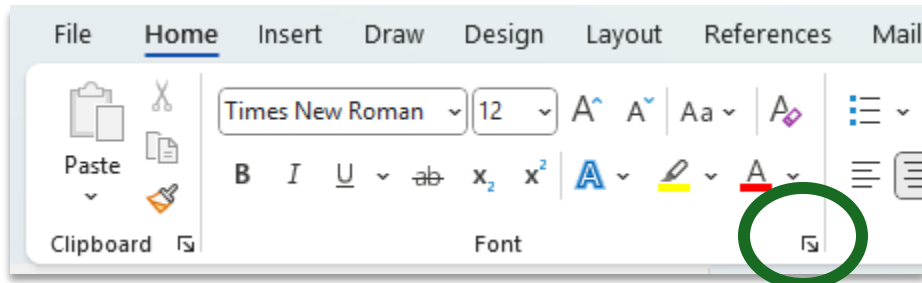
Times New Roman is the default font for the template; however, you have the option to use one of several fonts if you wish to change it (Aptos, Arial, Calibri, Courier New, Palatino Linotype, Tahoma, and Times New Roman are the Graduate School’s accepted fonts). To change the font:

Step 1: Change the “Normal” Style

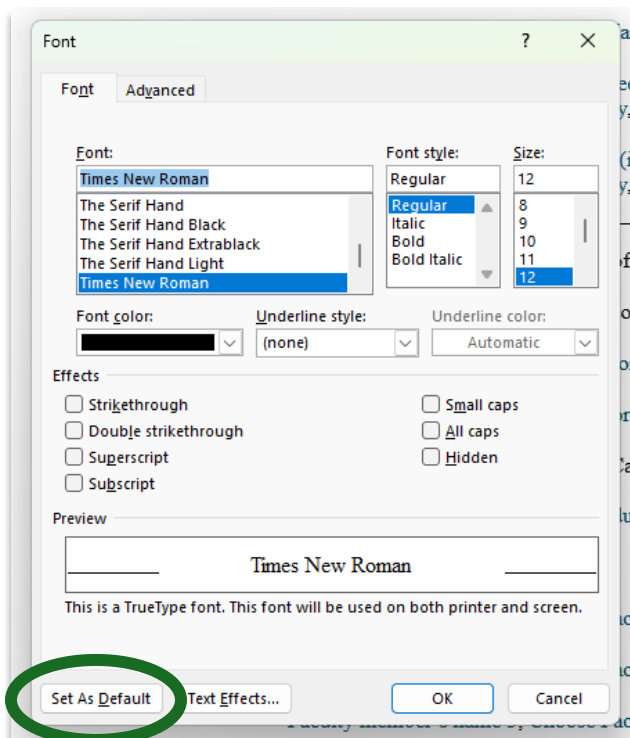
1. Navigate to the **Styles** menu and right-click on the **Normal** style.
2. Click on **Modify** in the menu that opens.
3. That should take you to a new menu where you can set the font. Select the font of your choice. Make sure the size is set to 12. Click **OK**.
4. See the [“Heading Styles: How to Edit Them”](#) section for more information.

Step 2: Set New Default Font

1. Navigate to the **Font** menu on the **Home** tab. Click on the expanding arrow.



2. A new menu will open. Choose your preferred font, then select **Regular** for the style and **12** for the size.



3. Click **OK**.

Changing Font Color

If you still have any blue font after adding your content, you can select all text (Windows: ctrl + a; macOS: cmd + a). Then, go to **Font**, and select black as the font color. This will change all text to black.

Deleting Pages

1. Click or tap anywhere on the page you want to delete.
2. Press **ctrl + g** in Windows; press **Option + Cmd +g** for MacOS.
3. In the **Enter the page number** box, type **\page**.
4. Press **Enter (or Return)** on your keyboard, and then select **Close**.
5. Verify that a page of content is selected, then press **Delete** on your keyboard.

Landscape Pages

If you need to add a landscape page to your document, you will use **Section Breaks** (*not* page breaks) to isolate the pages you want to convert into landscape orientation.

1. Go to the end of the preceding page where you want to insert the landscape page(s).
2. Go to **Layout**, then **Section Break – Next Page**.
3. You will now see a new, blank page. From there, again click **Layout > Section Break – Next Page**.
4. Put your cursor on the middle, blank page. Go to **Layout**, then **Orientation>Landscape**. The page should now be in landscape.
5. Leave the page number on the long, right side of the page. Do not move it or change the placement. The template contains a properly formatted landscape page.

Accessibility: How to Make Your Document Accessible

Headings and Bookmarks

It is important that you use the heading styles pre-set in the template because they create bookmarks, ensuring users of all abilities can access your document. People who use screen readers will be able to read your document with ease with bookmarks in place.

Heading Hierarchy

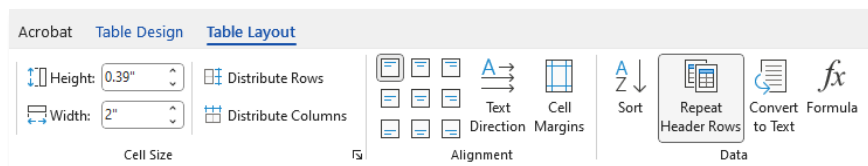
The order of your headings is essential to accessibility. DO **NOT** USE HEADING 1 FOR MAJOR HEADINGS. You are **required** to follow the heading hierarchy that is already established in the template. If you deviate from the established heading hierarchy, your document will **not** pass the format check. **This is the correct hierarchy** (continue this order for as many levels as you need):

- Heading 1: Document title
 - Heading 2: Major headings (e.g., “Abstract,” “Chapter 1: Introduction”)
 - Heading 3: First-level subheadings
 - Heading 4: Second-level subheadings
 - Heading 5: Third-level subheadings.

Accessible Tables

The most important feature of having an accessible table is repeating the header row:

1. Go to the **Insert** tab, then click on **Table**, then **Insert Table**.
2. After you add the table, a table menu tab will appear. Click on **Table Layout**, then click on the box reading **Repeat Header Rows**.



Alt Text for Figures

Image descriptions can be added as alternative text in Word. Alt text is read by screen readers in a Word file and should remain intact when you convert the .docx file to HTML or PDF.

1. Right-click on the figure and select **View Alt Text**. An alt text panel will appear.
2. Enter the appropriate alt text in the text box. It should be a 1-2 sentence description of the figure/image.

When to Write Alt Text

The following items must have alt text to ensure accessibility:

- Figures
- Any image files (e.g., schemes in chemistry, bars of music, etc.)
- Screenshots of emails, programs, etc.
- Tables that are actually “pictures” or image files (e.g., JPEG).

Tips for Alt Text

- Use “in line with text” for the wrap text option for all figures and image files.
- Only use JPEG files. PNG files and SmartArt do *not* retain alt text when you convert your document to a PDF.
- Do *not* use AI-generated descriptions!
- Use a distinct description of the image. Do NOT use the figure caption as alt text!

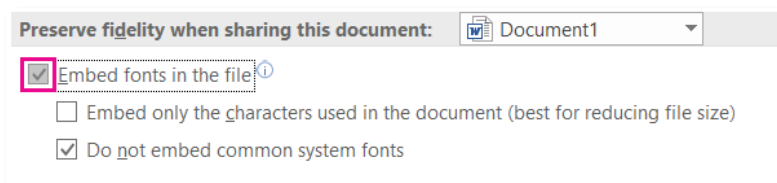
How to do an Accessibility Check in Word

You can check your document’s accessibility by going to the **Review** tab, then selecting **Check Accessibility** in the **Check Accessibility** menu. The checker will tell you what to fix to make your document accessible to all readers. For more information on digital accessibility, please visit the [Digital Accessibility at USC’s Toolbox](#).

Embed Fonts

Embedding fonts can help with preserving your font when you convert the document to a PDF. When you embed fonts into the document, the online conversion will use these fonts to avoid font substitution.

1. Click on the **File** tab, and then click **Options**.
2. In the left column, select the **Save** tab.
3. At the bottom, under **Preserve fidelity when sharing this document**, select the **Embed fonts in the file** check box.



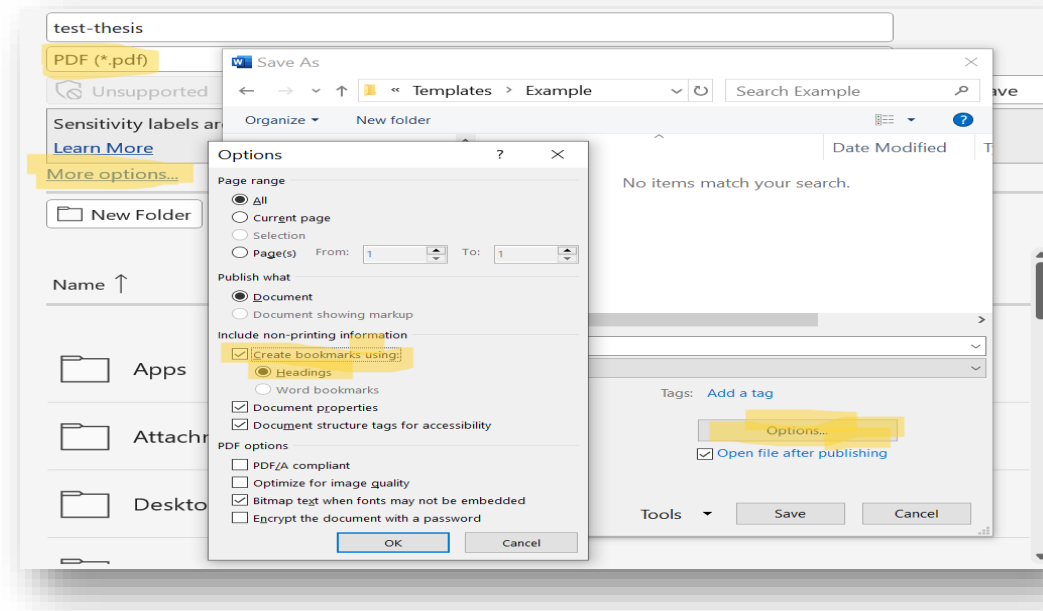
4. You will see two check boxes: Embed only the characters used in the document and Do not embed common system fonts.
5. Select **Embed only the characters used in the document** option to reduce the file size but limit editing of the file using the same font. This checkbox is common for both PowerPoint and Word.
6. Or, select **Do not embed common systems font**, which may increase the file size but is best for allowing others to edit the document and keep the same font.
7. Click **Ok**.

Convert Document to an Accessible PDF

You are required to submit your thesis or dissertation as a PDF file. To save it, follow the instructions below.

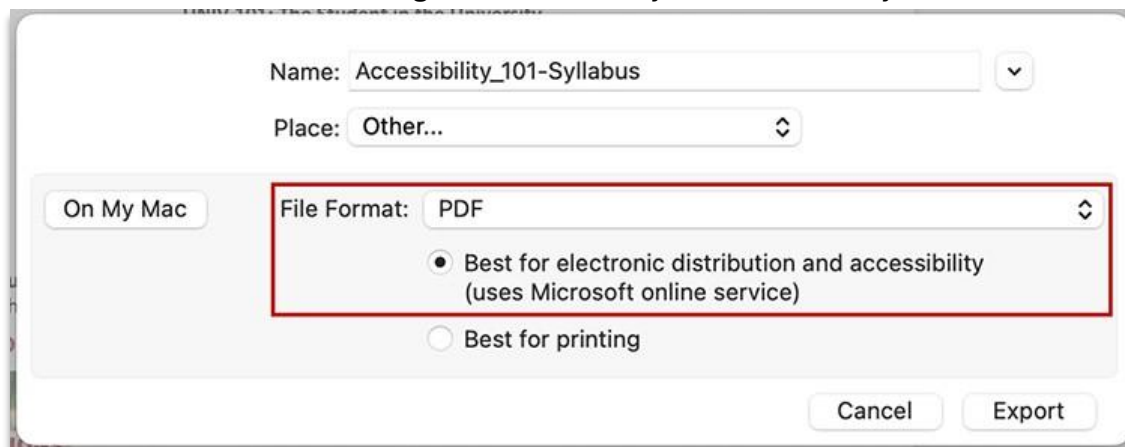
Windows

1. Click on **File**, then click either **Save As** or **Save a Copy**.
2. Select **PDF** from the “Save As” drop-down list.
3. Click on **More Options** directly under the file type.
4. Click the box labeled **Options** in the popup menu.
5. Click the box next to **Create bookmarks using: Headings**.
6. Now, you’re ready to submit your thesis or dissertation for the format check! Visit [ProQuest’s ETD Administrator](#) to submit your document.



Mac/OS

1. Select **File** from the Word menu bar above document screen.
2. Select **Save As** or **Save a Copy** (depending on which is displayed) from the File options.
3. Select **PDF** format under **Export Formats** from the file format options.
4. After **PDF** is selected, make sure **Best for electronic distribution and accessibility** is selected to ensure tags for accessibility are included in your PDF file.

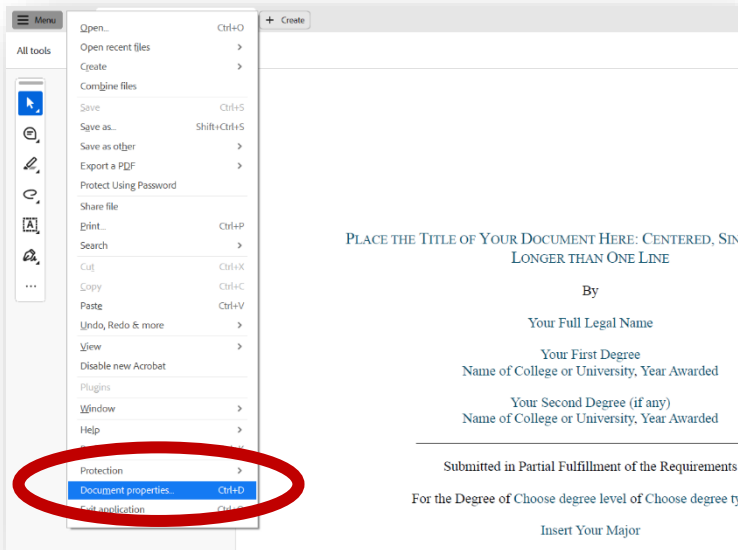


5. Provide a preferred file name and choose a location for the PDF to be exported to.
6. Click **Save**.

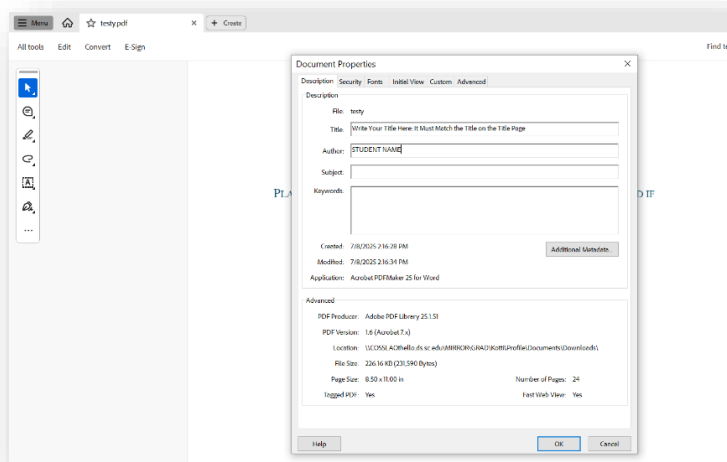
Give PDF a Title for Accessibility

To meet federal accessibility requirements, you will need to give your document a title in PDF form. The easiest way to achieve this is to add a title in Adobe's document properties.

1. Open the document in Adobe Acrobat Reader (or Acrobat if you have access to that program).
2. Navigate to the upper lefthand corner and click on **Menu**. From there, you will select **Document Properties**.



3. Next, Adobe will open another menu for the document properties. In the box for **Title**, write the title of your thesis or dissertation. In the **Author** box, you can write your name.



4. After entering the correct information, click **Ok**. Your document will now have a title that screen readers can recognize.

Accessibility Checklist

Use this checklist before you submit your document. This information is modified from the [Digital Accessibility Office's Toolbox](#):

- ☐ Use plain language and avoid jargon.
- ☐ Include meaningful [alternative text](#) for all figures.
- ☐ Use sufficient [color contrast](#) between text and its background.
- ☐ Do not rely on [color usage](#) alone to convey information.
- ☐ Label [form](#) fields appropriately.
- ☐ Order your [headings](#) in a nested hierarchy, and do not skip heading levels or leave empty headings. (The heading hierarchy is established in the template.)
- ☐ Write [link text](#) that describes the purpose of the link and makes sense when read out of page context.
- ☐ Make sure [tables](#) have header rows and are used to present data rather than to establish a visual layout.
- ☐ For tables longer than one line, set up the table properties to repeat the header row.
- ☐ Create a title for the [PDF](#) of your thesis or dissertation.
- ☐ Only use JPEG files for all images.
- ☐ Use “in line with text” for each figure’s wrap text option.