

How to use a table of contents in Word *but better* in 5 steps

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What is the table of contents

As the name suggests, a table of contents displays the headings of your document in a single location. If you've ever read a novel or seen a textbook, you've seen a table of contents.

They look like this.

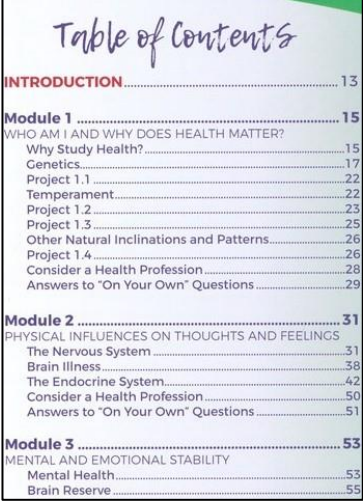


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Why should you use a table of contents?

Microsoft Word's table of contents (ToC) feature is a necessity for any documents over five pages. It allows readers to quickly navigate your work and can be automatically updated to reflect changes.

The ease of use and navigation coupled with the automatic updates can save you a lot of time (sometimes hours) if you find yourself working with large documents.

How to insert a table of contents *but better*

Microsoft has already written the basics of how to insert a ToC, and this official documentation for inserting a table of contents can be found [here](#).

However, there are nuances that can make the process much easier and more efficient.

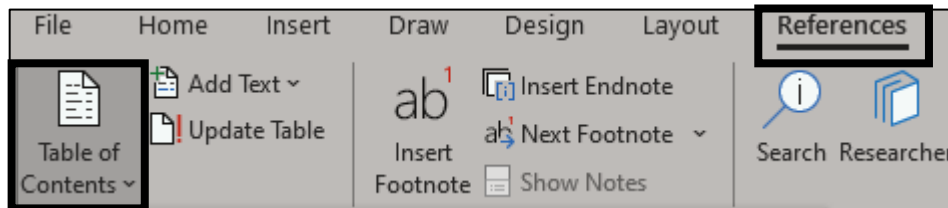
A small **note** before we start. The way you structure, organize, and write underpins this entire process. My goal is not to convert you to a different writing style. Rather, I am trying to offer guidance to those who don't have *their* method just yet.

Step 1: Page break (Control + Enter)

I do this on every document I draft that requires a ToC. The reason may not be obvious, but it's actually quite simple.

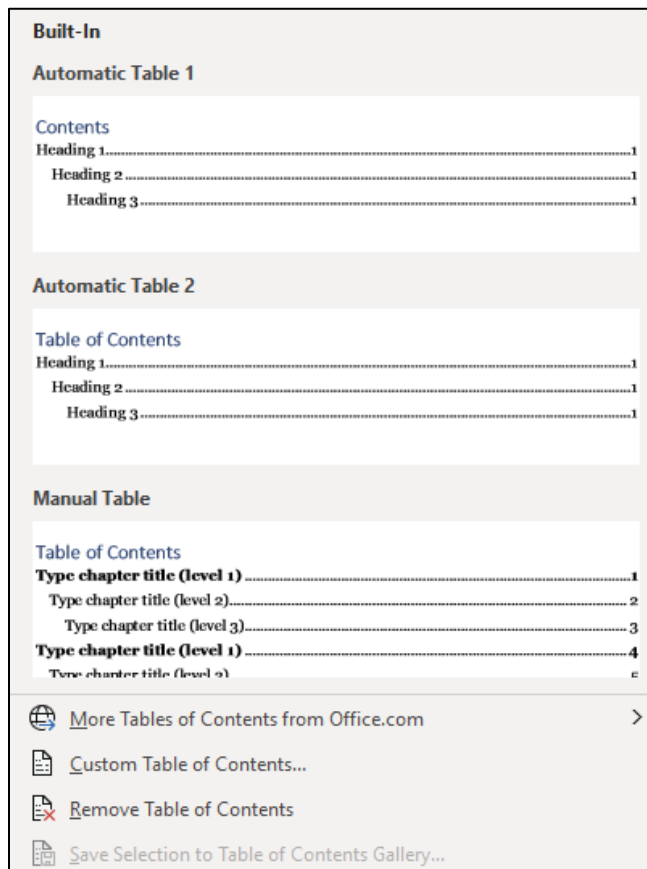
If your document needs a ToC, it's likely going to need a cover page as well. We insert the ToC on page two to allow space for the cover page.

Step 2: Insert the ToC



Click on References tab in the ribbon and then click on the Table of Contents command.

A drop-down window link this should appear.



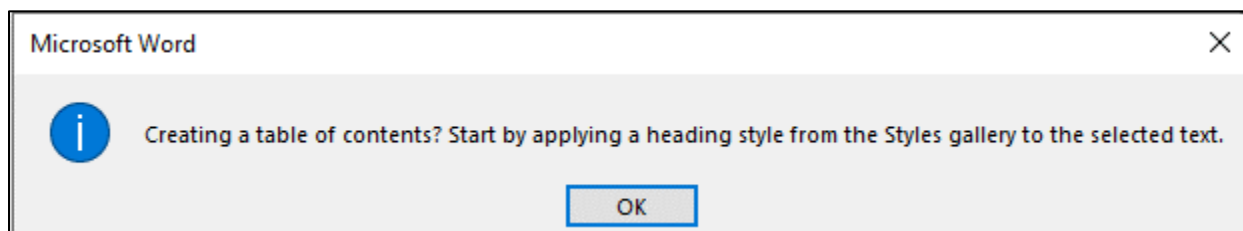
Click on the second ToC named Automatic Table 2.

Note: There are plenty of options including creating a custom table of contents. We're using this one, because it's one I use regularly and explaining the custom ToC option is beyond the scope of this post.

Step 3: Nothing came up?!?

I know nothing came up. Totally okay.

A message like this one should have appeared.



I whole heartedly disagree with Microsoft on this point.

It is *much* easier to insert a placeholder first and update it later (using the automatic update feature) rather than try and carve out room for a ToC after creating content.

This is what your ToC should look like now.



Step 4: Draft content and add headings and subheadings

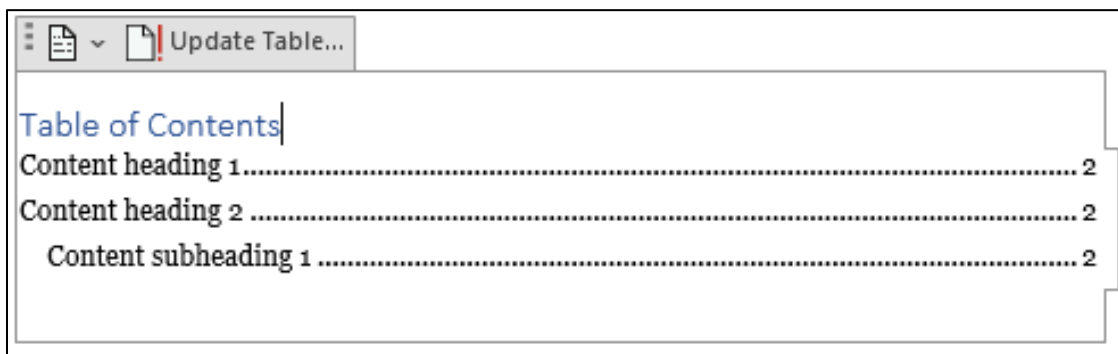
*type**type**type*

Step 5: Update the table of contents

Click anywhere in the table of contents and an interaction box like this should appear.



Click Update Table and all your headings and subheadings and sub-subheadings will magically appear.



That's it.

As you change your content, be sure to go back and update the table of contents to reflect those changes.

Now you and your readers can jump to a specific section by holding the Control key and left clicking (Control + L Click).

In all fairness, this may not make that much of a difference for five-to-seven-page document. Scrolling will work fine in that case.

For anything in the ten plus page range, allowing your readers the option to jump through content can be a life saver.

[Company Name]

Information Security Policy

The following documents are part of the enterprise level information security policies offered by Declarative Documentation.

These policies are meant to cover as much of your business as possible. The goal of documented policies is threefold.

First, a business that operates under an ad-hoc or under informal policy decisions is liable for legal action. One of the first questions asked by attorneys pursuing a discrimination or wrongful termination case is, "What is your policy on X?" If the answer to that question is, "We don't have one," or "Our policies aren't written down," the outcome can be disastrous.

Second, by documenting and formalizing policies you are setting a companywide standard. Being able to point to something tangible and say, "This is what we do, and this is how and why we do it," can be a relief and can set the bar for employees and management alike.

Third, we live in a world that is increasingly becoming dependent on compliance frameworks and regulatory bodies. A cornerstone of these frameworks is appropriate and effective policy documentation.

Throughout these documents you will find sections that underscored and highlighted, like this , or bracketed, like this [].

These are areas that allow the document to be customized to fit your business.

Acceptable Use

General Policy

[Company] Information Systems may be used only by authorized users for their authorized purposes to facilitate the legitimate business needs of [Company].

Users are responsible for exercising good judgment regarding the appropriate use of company resources in accordance with [Company] policies, standards, and guidelines.

Right to Monitor

[Company] reserves the right to monitor and audit all equipment, systems, devices, and network traffic.

Any devices or users found to interfere with [Company] networks or systems will be disconnected.

System Accounts

Users are responsible for:

- 1) The security of [Company] intellectual data, accounts, and systems under their control to the greatest extent possible; and
- 2) Maintaining system-level and user-level passwords in accordance with [Company]'s password policy.

Unacceptable System and Network Activities

The following is strictly prohibited:

- 1) Supporting illegal activities, procuring or transmitting material that violates [Company] policies, and any other communication that is deemed inappropriate.
- 2) Sending Spam content through any medium.
- 3) Forging, misrepresenting, obscuring, suppressing, or replacing a user identity through any communication.
- 4) Use of any [Company] email, IP address, or domain to engage in conduct that violates [Company] policy.
- 5) Violating copyright law through any means such as: duplicating or downloading pirated software or files.
- 6) Exporting or importing software, technical information, encryption software, or any other technology or data in violation of laws or company policy.
- 7) Violation of the rights of any person or entity protected by copyright, trade secret, patent, intellectual property, or any other applicable laws and regulations.
- 8) Revealing passwords or user accounts to others.
- 9) Executing any form of network monitoring without approval.

[redacted]

[redacted]

Standard Operating Procedure (SOP)

Document Number	Effective Date	Owner	Superseded By
□	□	□	□

Input/Trigger

There is no explicit trigger for this procedure. Rather, it is performed as needed and is intricately tied to the [redacted] procedure.

Output

The v[redacted] notifies the appropriate [redacted] and said [redacted] runs the expiration report.

Conditionals

There are conditional steps in this procedure denoted with asterisks **

Roles and Responsibilities

Role	Responsibility
[redacted]	Only referenced as part of this procedure's output.
[redacted]	Perform the procedure.

Areas of Input

This document uses brackets [] to designate areas of user input.

Procedure

Task 1: [redacted]

- 1) Go to [redacted].
- 2) Click on [redacted].
- 3) Click on [redacted].
- 4) Click on [redacted].
- 5) Click on the [redacted] drop-down menu.
- 6) Select [redacted].
- 7) Click on the View Report button in the upper right corner of the page.
- 8) Download the report as an excel file.
- 9) Enable editing if necessary.
- 10) Save this file to your local machine using the proper file name convention.

Example: [YYMMDD] [redacted]

Task 2: [redacted] Excel Sheet

- 1) Go to Google Drive
- 2) Open the [YYYY] [redacted] excel sheet

Path: [redacted]/Daily Tasks/[redacted]/[YYYY] [redacted]

Note: It is recommended to download this file and work from the local copy.

At this point you should have two excel files open. This procedure requires you to reference and work with both files.

To avoid redundancy and for ease of use, the [redacted]sheet will be referred to as “[redacted]sheet” and the [YYYY] [redacted]sheet will be referred to as “[redacted]sheet.”

Record of Changes

Version	Description	Date	Approval
[[redacted]]	[[redacted]]	[[redacted]]	[[redacted]]

Referenced Documents

Title	Reference	Location
[[redacted]]	[[redacted]]	[[redacted]]

Process Improvement Report

Created by: Declarative Documentation



For:

In Coordination

With:

Introduction

This report was generated as part of a standard operating procedure (SOP) development engagement between [redacted] (the Client), [redacted] (the Vendor), and Declarative Documentation (the Subcontractor).

While interviewing the SMEs, the Subcontractor was able to analyze the specific procedures individually and the larger process to the extent made available through these interviews. This analysis yielded the suggested improvements described in detail in this report.

In addition, SMEs were asked to contribute their own suggestions for process improvements during the interview sessions. These are also described in detail in this report and marked appropriately to distinguish them from the Subcontractor's suggestions.

Executive Summary

The following five (5) improvements make up the most tangible improvements that could be made to the Client's process and procedures.

Automation

Automate notifications between teams, technologies, and employees to reduce issues caused by human error. While automation can extend beyond simple notifications, using this as a starting point for integrating automation is recommended.

SME Suggestions

SME suggestions center on documentation improvements and the importance of effective communication between teams.

[Additional content redacted to protect client confidentiality.]

Automation

Complex processes and procedures that are solely reliant on human cognition for completion are often plagued with redundancy and forgetfulness.

Throughout the course of any process there are a multitude of approvals, denials, notifications, and other routines that, while critical to the process and business, are draining and tedious.

While it is possible to use automation to ease the burden on staff, automating many aspects of a procedure at once is not advisable. Selecting a small portion of a single procedure is the easiest and most scalable way forward.

To that end, the Client should consider automating notifications between various accreditation teams as well as within the teams themselves (i.e., between employees and teammates).

For example: [redacted]

Reviewing the feasibility of introducing automation into the business environment, and then choosing a solution that integrates with the Client's existing technology and software are a solid initial step.

Options available to the Client based on the Subcontractor's working knowledge of Client software and tools include:

- Kissflow (3rd Party)
- Power Automate (Microsoft)
- App Engine (Google)
- UiPath RPA (3rd Party)
- Automate.io (3rd Party)



These are in no particular order.

Again, prior to implementing any of these solutions, the Client should consult with either an internal information technology (IT) resource or an external party with automation experience as part of the feasibility review.

[Additional content redacted to protect client confidentiality.]



Description

One day's weather forecast.

Sample JSON File

```
{
  "date": "2015-09-01",
  "description": "sunny",
  "maxTemp": 22,
  "minTemp": 20,
  "windSpeed": 12,
  "danger": false
}
```

Response Element Table

Element	Description	Type	Notes
date	The day of the forecast	string	Format is YYYY-MM-DD
description	Text description of the day's weather	string	Values limited to "sunny", "overcast", "partly cloudy", "raining", and "snowing"
maxTemp	The day's highest temperature	number	In degrees Celsius
minTemp	The day's lowest temperature	number	In degrees Celsius
windSpeed	The day's average windspeed		In kilometers per hour
danger	True if weather conditions are dangerous; otherwise, false	boolean	



Description

A weather forecast for multiple days.

Sample JSON File

```
{
  "longitude": 47.60,
  "latitude": 122.33,
  "forecasts": [
    {
      "date": "2015-09-01",
      "description": "sunny",
      "maxTemp": 22,
      "minTemp": 20,
      "windSpeed": 12,
      "danger": false
    },
    {
      "date": "2015-09-02",
      "description": "overcast",
      "maxTemp": 21,
      "minTemp": 17,
      "windSpeed": 15,
      "danger": false
    },
    {
      "date": "2015-09-03",
      "description": "raining",
      "maxTemp": 20,
      "minTemp": 18,
      "windSpeed": 13,
      "danger": false
    }
  ]
}
```

Continued on next page.



Response Element Table

Element	Description	Type	Notes
longitude	The longitude of the forecast's location	number	
latitude	The latitude of the forecast's location	number	
forecasts	A list of the weather on the forecasted dates	array of weather on multiple days	
date	The day of the forecast	string	Format is YYYY-MM-DD
description	Text description of the day's weather	string	Values limited to "sunny", "overcast", "partly cloudy", "raining", and "snowing"
maxTemp	The day's highest temperature	number	In degrees Celsius
minTemp	The day's lowest temperature	number	In degrees Celsius
windSpeed	The day's average windspeed		In kilometers per hour
danger	True if weather conditions are dangerous; otherwise, false	Boolean	



Description

Represents a request for an hour-long meeting on a calendar.

Sample JSON File

```
{
  "meeting" : {
    "time": "2015-09-01 10:00",
    "duration": 60,
    "description": "2016 Strategic Planning Meeting",
    "location": "Building 23, Room 206",
    "reminder": 15,
    "invitees": ["michael@example.com", "thelma@example.com",
      "david@example.com", "leon@example.com"]
  }
}
```

Request Element Table

Element	Description	Type	Required	Notes
meeting	Top level	Meeting data object	required	
time	When the meeting starts. Time zone is GMT.	string	required	Format is YYYY-MM-DD HH:MM
duration	Meeting length in minutes.	number	required	
description	A description/purpose of the meeting.	string	required	
location	Where the meeting takes place.	string	optional	Default is an empty string
reminder	How many minutes prior to the meeting to remind the invitees.	number	optional	Default is 10 minutes
invitees	A list of people's email addresses to invite to the meeting.	Array of strings	optional	Strings should be valid email addresses. Default is an empty array.



Description

Represents a request to record a TV program via a mobile application.

Sample XML File

```
<recordTV>
  <date>2015-06-01</date>
  <time format="24">18:00</time>
  <duration>1.5</duration>
  <channel>54</channel>
</recordTV>
```

Request Element Table

Element	Description	Type	Required	Notes
recordTV	Data when a TV program should be recorded	TV program data	required	
date	Date of TV program	string	optional	Format is YYYY-MM-DD. Default is today's date.
time	Time TV program begins	string	required	Attributes: <ul style="list-style-type: none"> format has values "24" or "12" for 24- and 12-hour formats. Format is HH:MM with am or pm afterwards for 12-hour format.
duration	Length TV program in hours	number	required	
channel	The channel to record on	number	required	



Description

Represents a request to record a TV program via a mobile application.

Sample XML File

```
<recordTV>
  <when date="2015-06-01" time="18:00" format="24"/>
  <duration hours="1.5"/>
  <station channel="54"/>
</recordTV>
```

Request Element Table

Element	Attribute	Description	Type	Required	Notes
recordTV		Data on when a TV program should be recorded	TV program data	required	
	when	The date and time TV program airs	Date and time data	required	
	date	Date TV program airs	string	optional	Format is YYYY-MM-DD. Default is today's date.
	time	Time TV program begins	string	required	Format is HH:MM with am or pm afterwards for 12-hour format.
	format	Time format	number	required	Valid values = 24, 12
	duration	Length of TV program	duration data	required	
	hours	Length of TV program in hours	number	required	
	station	The station the TV program airs on	station data	required	
	channel	The channel the TV program airs on	number	required	



Description

Response from museum temperature and humidity sensors.

Sample XML File

```
<dailyData>
  <date>2015-06-01</date>
  <hourlyData>
    <time>10:00</time>
    <device>
      <id>34</id>
      <temperature>70</temperature>
      <humidity>11</humidity>
    </device>
    <device>
      <id>35</id>
      <temperature>72</temperature>
      <humidity>12</humidity>
    </device>
    ...
  </hourlyData>
  <hourlyData>
    <time>11:00</time>
    <device>
      <id>34</id>
      <temperature>71</temperature>
      <humidity>10</humidity>
    </device>
    ...
  </hourlyData>
  ...
</dailyData>
```

Continued on next page.



Response Element Tables

Top level

Element	Description	Type
dailyData	Temperature and humidity data for one day	dailyData element

dailyData: represents temperature and humidity data for one day.

Element	Description	Type	Notes
date	Date data was taken	string	Format = YYYY-MM-DD
hourlyData	Temperature and humidity data for one hour	hourlyData element	

hourlyData: represents temperature and humidity data for one hour.

Element	Description	Type	Notes
time	Time data was taken	string	Format is MM:HH and in local time
device	One or more device objects with data from each device	device element	

device: contains device ID and temperature and humidity data.

Element	Description	Type	Notes
id	Identifier of device sending data	number	
temperature	Measured temperature at device	number	In degrees Fahrenheit
humidity	Measured humidity at device	number	In percentage