How to create a TOC in Word

Below are instructions to create a Table of Contents that meet UTD formatting requirements. This document is abbreviated from instructions created by Dr. Charles Shields, who kindly created the Word template for UTD dissertations and theses. It is not a requirement to set up your TOC using this guide, but it may be a helpful tool if you have not set up a TOC before or would like to set one up without adjusting the formatting on your own.

Please note that chapter headings like “CHAPTER 1” and “CHAPTER 2” are created by a multilevel list that is embedded within the TOC, instead of pulling and reading information from the Heading 1 style. The benefit of this technique is that it allows the chapter titles, such as “INTRODUCTION”, to be placed on the same line as the “CHAPTER X” text. The flip-side is that it is a bit complicated to set up, and further, that it requires each chapter to have a chapter title to work correctly, since the multilevel list is linked to the style TOC2 (the “Heading 2” style is also linked to TOC2).

If you wish to have a TOC like this, perform the following steps exactly:

1. Highlight the line that says “Click and Insert Table of Contents”
2. Go to the “References” tab, “Table of Contents” group. Click on “Table of Contents” and choose “Insert Table of Contents...” at the bottom.
   2.1. The resulting dialog should be set on the Table of Contents tab.
3. In that dialog, make sure that “Show page numbers” and “Right align page numbers” are both checked, the tab leader is “…”, and that “Show levels” through 4 are set.
4. Choose the “Options” button in the lower right.
5. Make sure the “Styles” box is checked.
6. In the “Available Styles” list, do the following:
   6.1. Clear the number for “Heading 1.”
   6.2. Make sure Heading 2 through 4 are set with the numbers 2 through 4.
   6.3. Set the “Section Label” style to the number 9.
   6.4. Set the “SectionLabel2” style to the number 7.
   6.5. If there is an “INTRODUCTION” section, set the “SectionLabel3” style to the number 8. (See Section 11 for a discussion on setting up an “INTRODUCTION” section.)
   6.5.1. This is unnecessary if there is no “INTRODUCTION” section.
   6.6. Verify that the style “SubSubTitle” is set to number 3.
7. Choose “OK” to close the options box.
8. Choose “OK” to create the TOC.

All page numbers should be automatically calculated. If not, highlight the entire TOC and choose “Update Field” from the context sensitive menu. Sometimes it is necessary to do this even after the table has been created to get the correct page numbers.

Note that TOC’s can be directly edited after they are created. You can use this feature to adjust the formatting if necessary. (For example, if you want to manually change the spacing
between some lines after the TOC is calculated, Word allows you to do that. Note that all lines in the calculated TOC are in various TOC styles.)

You can use this capability to correct a small problem that sometimes occurs in Word 2007 when the TOC is automatically generated. If you’ve turned hyperlinks off when you created the TOC, you may discover that the second line in the TOC has a dotted leader going to a page number on the right, but no word identifying that leader on the left. In other words, there may be an apparent gap on the left hand side. This occurs when the word “Abstract,” located at the left hand side of that line, is printed in white text. (This results from a white text “Abstract” that was placed on the Abstract page. It only happens if hyperlinks are not used in the table generation.) If that happens, simply highlight the missing word in the calculated TOC and set the font color to “Black.” (The font color option is in the “Home” tab, “Font” group, lower right option.)

Also, be aware that TOC’s in Word are created by a TOC field. To access the field code itself, highlight the entire TOC and choose “Toggle field codes” from the context menu, which will display the field code itself instead of the result of the field. Note that all Word fields have codes that can be directly edited if the field code is displayed, and many of the formatting and other characteristics can be controlled by switches embedded in these fields. (For example, in the case of the TOC field, if you remove the “\h” switch and then update the table, the TOC entries will no longer function as hyperlinks.)