

Creating long documents using Microsoft Word 2003

This Guide explores the facilities within Word that aid the production of long documents such as dissertations and theses. A familiarity with the basic editing operations in Word is assumed. Knowledge of styles and templates in Word is also required. The sample files referred to in the document are provided on the Networked PC service. Users of stand-alone PCs can get copies of these files from the ITS WWW pages.



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Conventions:

In this document, the following conventions are used:

- A typewriter font is used for what you see on the screen.
- A **bold typewriter font** is used to represent the actual characters you type at the keyboard.
- A *slanted typewriter font* is used for items such as filenames which you should replace with particular instances.
- A **bold font** is used to indicate named keys on the keyboard, for example, **Esc** and **Enter**, represent the keys marked Esc and Enter, respectively.
- A **bold font** is also used where a technical term or command name is used in the text.
- Where two keys are separated by a forward slash (as in **Ctrl/B**, for example), press and hold down the first key (**Ctrl**), tap the second (**B**), and then release the first key.

Contents

1	Introduction	1
2	Saving your document	1
2.1	Save options	1
2.1.1	Fast save	1
2.1.2	Background saves	2
2.1.3	Always create backup copy	2
2.1.4	Save AutoRecover information	2
2.2	Zip and SuperDisk drives	2
2.3	Compressing files	2
3	Styles	3
4	Outline view	3
4.1	Collapsing and expanding text	4
4.2	Moving text	4
4.3	Promoting and demoting text	5
5	Document map	5
6	Sections	6
6.1	Changing the orientation	7
6.2	Adding different headers/footers to sections	7
7	Inserting a caption	8
8	Table of Contents and Table of Figures	9
8.1	Table of Contents	9
8.2	Table of Figures	10
8.3	Updating a Table of Contents or Figures	11
8.4	Page numbering	11
9	Bookmarks	12
9.1	Inserting a bookmark	12
9.2	Viewing Bookmarks	13
10	Cross-referencing	13
10.1	Using a hyperlink to move to a cross reference	15
11	Creating an index	15
11.1	Marking index entries	15
11.2	Creating an index table	17
12	Master documents	17
12.1	Order of work	18
12.2	Creating a Master Document	19
12.3	Working with a Master Document	20
12.4	Creating new subdocuments	20
12.5	Saving a Master Document	21
12.6	Converting an existing document to use Master Document	22
13	Miscellaneous	22
13.1	Setting footnotes and page numbers to start at a specified number	22
13.2	Insert File command	22
13.3	Referenced documents	23

- 14 Tips on creating a long document 23**
- 14.1 Planning the document 23
- 14.2 Developing the document 23
- 14.3 Splitting the document into separate files 23
- 14.4 File management and backups..... 24
- 14.5 Graphics 24
- 14.6 Automated features 24
- 14.7 Timing 25
- 14.8 Working collaboratively 25

1 Introduction

A long document is one that can be split into sections or chapters and that may require a contents page or an index. This guide is an example of a long document. When working with long documents Word provides a number of useful facilities such as:

- Different views to enable easy editing
- Automated facilities for inserting captions, Table of Contents and Table of Figures
- Bookmarking and cross-referencing
- Creating indexes
- Master Documents

This guide is divided into sections covering the main topics needed to enable you to produce long documents. Throughout the guide there are short exercises to follow, using sample Word documents which have been prepared for you.

If you are using a stand-alone PC you can get a copy of these files from the ITS WWW pages at

<http://www.dur.ac.uk/its/info/guides/files/word/>

If you are using the Networked PC service, the files can be found on the T: drive — called **workfile on Dudley (T:)**. Look in the folders **ITS**, then **Word** finally **LongDocs**.

2 Saving your document

2.1 Save options

Word has several options that affect how files are saved. When you are working on important documents and large files, you may wish to consider making changes to these options. They are accessed by selecting the **Save** tab within **Tools | Options**.

2.1.1 Fast save

As you develop your document you will be constantly updating the file(s) that you create. If the **Allow fast saves** option in Word is selected each time you update a file. Word actually builds up a list of all your changes and saves this list rather than making the actual changes to your stored work. This can make the file considerable larger. To save computer memory and eventually computer speed you may wish to turn off fast saving.

Fast save is of most benefit when your work contains pictures, tables, columns or OLE objects. In these cases you may wish to use fast save for saving work every 5 or 10 minutes, and then do a full save (by turning off the **Allow fast saves** box) every half hour or so.

To turn off fast save:

- 1 Select **Tools | Options**.
- 2 Select the **Save** tab.
- 3 If the **Allow fast saves** box has a tick in it, remove it by clicking in the box.
- 4 Click **OK**.

Note: The **Allow fast saves** option is not selected as a default on the University PC Network.

2.1.2 Background saves

If the **Allow background saves** check box is ticked, a document can be saved in the background, while you continue to work. Turning this option off will release system resources, but you will not be able to work on the document whilst it is being saved.

2.1.3 Always create backup copy

If this option is ticked a backup copy of each file is always kept. As Word has an AutoRecover feature (see 2.1.4) it is not necessary to make backup copies in this way. You should, of course, make backups manually and keep them in a different place. See section 14.4.

2.1.4 Save AutoRecover information

When this option is ticked Word automatically saves documents in a special format and uses them to recover lost work if you end a Word session without exiting properly — if, for example, there is a power cut or some other inadvertent shutdown of the computer. It is recommended that you always have this option ticked.

You can set the time interval between automatic saves. This represents the maximum amount of work that will be lost if AutoRecover is necessary.

2.2 Zip and SuperDisk drives

Long documents tend to take up a lot of space and often the file is too large to be stored on an ordinary floppy disk.

Many modern PCs can also read Zip disks. In several locations around the University, the ITS provides PCs with these facilities.

Zip disks hold about 100Mb of information. They can be purchased at the IT Service Desk, from where you can also obtain a list of the PCs in which you can use Zip disks. Most of the classrooms and open access areas have some PCs with this facility.

2.3 Compressing files

If a file is too large to fit onto a floppy disk, one option is to compress the file. There are several applications available to buy, such as Winzip, that enable you to do this.

There is a utility called PowerArchiver on the ITS Networked PC service (Start | Utilities) that can be used to compress files. See **InfoSheet 139: Using PowerArchiver** for further information.

3 Styles

Several of the automated features in Word only work if you have used styles to distinguish the various levels of headings within your document. The Normal Template has a few in-built styles that you can use, but it is more likely that you will wish to develop your own set of styles and save them as a template. For further information about styles refer to the Help system, or **Guide 164: Using styles and templates in Microsoft Word**.

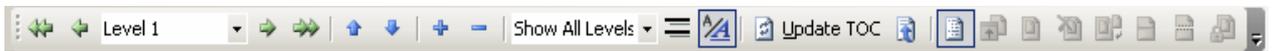
4 Outline view

Once styles have been created and applied to a document, **Outline View** can be used to show the hierarchy of the styles within the document. Within **Outline View** a document can be collapsed to show only headings, or expanded to view the entire document. **Outline View** also makes moving around a large document or moving text easier.

- 1 Open the file **T:\ITS\Word\LongDocs\ResponsibleUse.doc**.
- 2 Select **View | Outline** from the menu or click the **Outline View** button at the bottom left of the screen.



A new toolbar appears on the screen along with symbols to the left of each paragraph.



The **Show Level** drop down menu is used to show the different levels of headings within a document. Selecting the appropriate level from the options available allows you to view the different levels within a document.

The text will expand/collapse to show only the text that is formatted with the chosen heading level or above.

- 3 Select **Show Level 1**.

Now only text that has been formatted as **Heading 1** is displayed.



- 4 Select **Show Level 2** to show both **Heading 1 and 2** text.

Now text that has been formatted as **Heading 2** or **Heading 1** is shown.

The \pm and \mp symbols next to the text indicate whether there are further heading levels within. A \pm means that the following text is of a lower heading level. A \mp means that following text is at the same heading level or higher.

4.1 Collapsing and expanding text

You can change the level of text displayed by double clicking on a  symbol. This toggles between showing just the heading (collapsed) and showing the heading plus associated lower heading levels (expanded).

- 1 Place the mouse over the  next to the heading **Introduction**. Only the heading should be showing, following the last exercise (i.e. the text is collapsed). If all the text is showing, click on the **Show Heading 2** button.
- 2 Double click on the . All the text under this heading can now be seen.
- 3 Double click again on the  to collapse back to the heading.

Alternatively the **Expand** and **Collapse** buttons on the toolbar can be used. Position the cursor within the **Heading** to be expanded/collapsed and click the appropriate button.



- 4 Position the cursor in **Safety**. Click on the **Expand** button to expand the heading.



- 5 Click on the **Collapse** button to collapse the heading.

Other buttons on the toolbar allow you to toggle between other views.



- The **Show First Line Only** button displays only the first line of each paragraph.



- The **Show Formatting** button displays the document without any formatting.

Note: A document can be printed in **Outline View**.
Page numbers cannot be accessed in **Outline View**.

- 6 Experiment with showing different heading levels, and collapsing and expanding headings.
- 7 Set to show **Heading 1** and **2**.
- 8 Make sure that the **Show First Line Only** button is not selected and that all the formatting is showing.
- 9 Leave the document on screen for the next section.

4.2 Moving text

Repositioning text within a document is also simple in **Outline View**. If text that is formatted as a Heading is moved whilst the associated text is compressed it will all be moved.

With the cursor within the heading of the text to be move, clicking the **Move Up** button will move the text up the document. The **Move Down** button will move text down a document.

- 1 With **ResponsibleUse.doc** still open from the previous exercise, position the cursor on the heading **Viruses** (ensure that the heading



is collapsed). Move the heading and its associated text to above **Backups** by clicking on the **Move Up** button.

2 Expand the heading to ensure all the text has been moved with the heading.

3 Collapse the Headings back to level 2.



4 Click on the **Move Down** button to move **Viruses** back to its original position.

Text can also be moved by positioning the mouse over  for the required heading and dragging it to the new position.

5 Repeat steps 1 to 4 but this time click and drag on the  symbol next to **Viruses** to move it above **Backups** and back again.

Note: If a heading and its associated text appear to have vanished, just click on the appropriate Show Heading button to refresh the display.

4.3 Promoting and demoting text

Once text has been formatted as a Heading it can be demoted (moved down a Heading level) or promoted (moved up by a Heading level) by using the **Promote** and **Demote** buttons. All the selected text will then be reformatted accordingly.

The **Demote to Body Text** button will remove the heading style and set the text style back to Normal.

1 Position the cursor in **Logins and passwords**.



2 Click on the **Demote** button to change it from **Heading 1** to **Heading 2** as part of the section **Using Networked computers**.



3 Now change **Logins and passwords** back to **Heading 1** by clicking on the **Promote** button.

4 Close the document without saving any changes.

Note: Quick keys can also be used. Text can be formatted as Heading 1 by using **Ctrl/Alt/1**, Heading 2 by using **Ctrl/Alt/2**, etc. A style can be removed by using **Ctrl/Shift/N**.

5 Document map

If styles have been applied to a document, the document map can be used to move quickly around a document.



The **Document Map** is switched on by selecting **View | Document Map** or clicking on the **Document Map** button on the toolbar.

1 Open the file **T:\its\Word\LongDocs\ResponsibleUse.doc** if it is not already open.

2 From the menu select **View | Document Map**.

A vertical pane appears along the left side of the screen outlining the document structure. You can move quickly to different parts of the document by selecting headings in the document map. The + and - symbols next to the headings show whether there are further sub headings within a heading or not. Clicking on a + or - will expand or collapse these headings.

- 3 Click on any one of the headings to move to that point in the document. Try selecting a few more.
- 4 Reduce the width of the Document Map pane by clicking and dragging on the right hand boundary. Notice that when you point to a heading the whole of the heading is displayed.



The document map can be removed by selecting **View | Document Map** or clicking once again on the **Document Map** button.

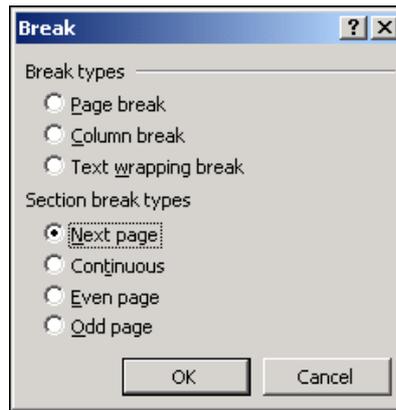
- 5 Click on the **Document Map** button to turn off the document map.
- 6 Close the document without saving any changes, or leave it open for the next exercise.

6 Sections

Sections are created in documents when certain parts of a document are required to be formatted differently from the rest of the document, as in page layout, columns, page numbering, etc. A document can have as many sections as required.

Breaking the document into sections also allows you to add different text in the Header or Footer area of a page for different parts of the document, the chapter title for example.

- 1 Open the file **T:\its\Word\LongDocs\ResponsibleUse.doc** if it is not already open.
- 2 Make sure that you are in **Print layout** view.
- 3 Position the cursor at the beginning of the heading **Glossary of common computer terms** at the end of the document (you could use the Document Map to move to this heading).
- 4 Turn off the Document Map if used in instruction 3.
- 5 From the menu, select **Insert | Break**.



- 6 Under **Section breaks** select **Next page** (i.e. the new section will start on a new page) and click **OK**.

You can now apply different formatting to the different sections.

6.1 Changing the orientation

- 1 Position the cursor anywhere after the section break.
- 2 From the menu select **File | Page Setup**.
- 3 Select the **Margins** tab and choose **Landscape** from **Orientation**. Note that the **Apply to:** is **This section**.
- 4 Select the **Margins** tab and change the top and bottom margins to **2cm**.
- 5 Click **OK**.
- 6 Print Preview the document. The last page of the document is in **Landscape** orientation.
- 7 Click **Close**.

6.2 Adding different headers/footers to sections

- 1 Position the cursor anywhere in the document before the section break.
- 2 Select **View | Header and Footer**.
- 3 Press the tab key once to move the cursor to the centre of the header pane and type **Responsible Use of Computers**.
- 4 Click the **Close** button on the **Header and Footer** toolbar.
- 5 Move the cursor to anywhere after the section break.
- 6 Select **View | Header and Footer**.
- 7 Click the **Link to Previous** button on the **Header and Footer** toolbar so that it is not selected.

- 8 Replace the words **Responsible Use of Computers** with **Appendix**.
- 9 Click on the **Close** button on the **Header and Footer** toolbar.
- 10 **Print Preview** the document and note the headers.
- 11 Close the document without saving any changes.

To remove a **Section break**, change to **Normal View**. Place the cursor on the line, **Section Break** and press the **Delete** key.

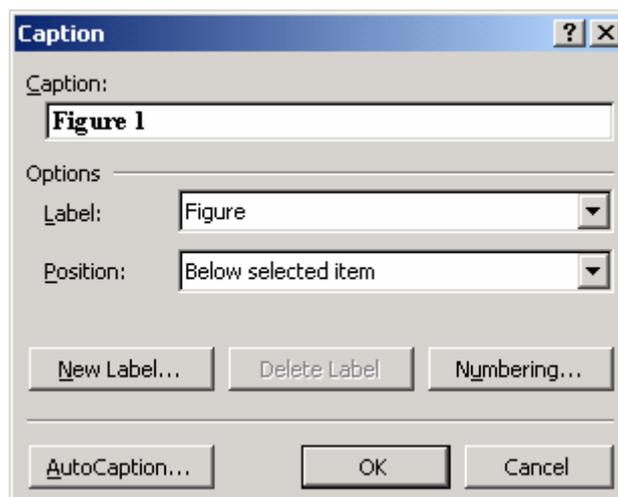
.....Section Break (Continuous)

7 Inserting a caption

Captions can be added to a document so that items such as graphs, pictures and tables are automatically numbered. As you add, remove or re-arrange the items the numbering is automatically adjusted.

Once captions have been entered in this way a **Table of Figures** can also be created.

- 1 Open the file **T:\its\Word\LongDocs\ResponsibleUse.doc** if it is not already open.
- 2 Scroll through the document to the section heading **Backups** (you could use the Document Map to locate this heading).
- 3 Turn off the Document Map if used in instruction 2.
- 4 Right-click the picture of the diskettes.
- 5 Select **Caption....**



- 6 From **Label** choose **Figure** and set **Position** to **Below selected item**.
- 7 Click **OK**.

The caption **Figure 1** appears below the table.

Note: The **Numbering** button within the caption dialog box allows you to change the style of the numbers if you wish.

As more captions are added, Word will automatically number them.

- 8 Scroll down the document to the section heading **Email** and select the picture.
- 9 Repeat steps 5 to7.

It is possible to include text with the caption number if you wish.

- 10 Scroll down the document to the heading **What to do when things go wrong** and right-click the picture.
- 11 Select **Caption....** Ensure **Label** is set to **Figure**.

The cursor will be flashing in **Caption** next to **Figure 3**.

- 12 Type (with a space before the words):

Don't Panic!

- 13 Click **OK**.

The caption **Figure 3 Don't Panic!** appears.

- 14 Leave the file **ResponsibleUse.doc** open for the exercises of **Tables of Contents and Tables of Figures**.

Note: By selecting **AutoCaption** from the **Caption** dialog box, it is possible to automatically insert a caption on an object as soon as it is inserted into a document. To do this, select **AutoCaption** and check the items to be automatically captioned from the **Add Caption When Inserting** list. When these items are inserted in a document a caption will automatically appear.

8 Table of Contents and Table of Figures

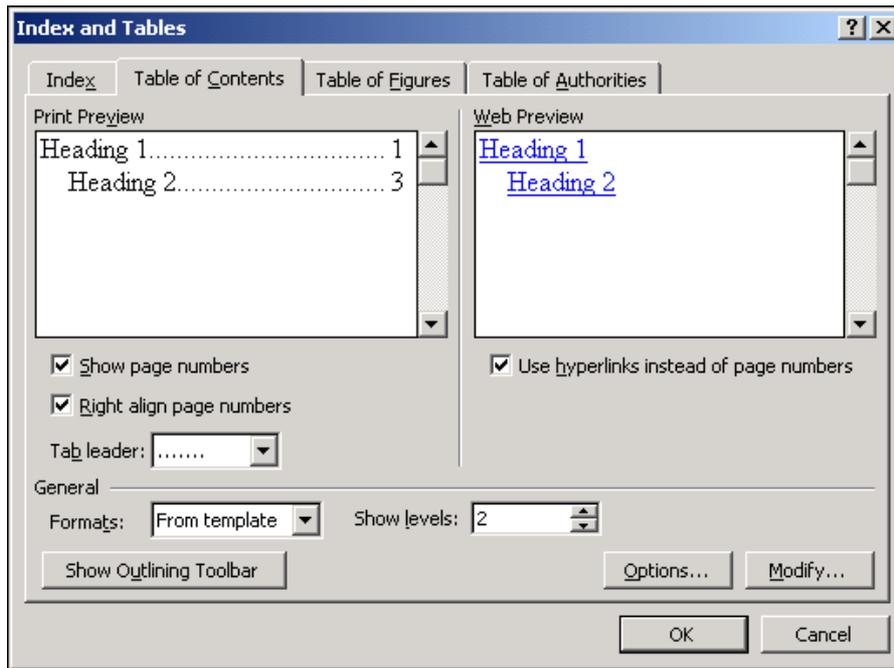
If styles have been applied to the headings in a document it is a simple process to automatically list the headings showing the corresponding page numbers. This is known as a **Table of Contents**.

Similarly, if captions have been used you can automatically list the figures with the corresponding page numbers. This is known as a **Table of Figures**.

8.1 Table of Contents

- 1 Position the cursor at the beginning of the document **ResponsibleUse.doc**.
- 2 From the menu select **Insert | Reference | Index and Tables...** and select the **Table of Contents** tab.

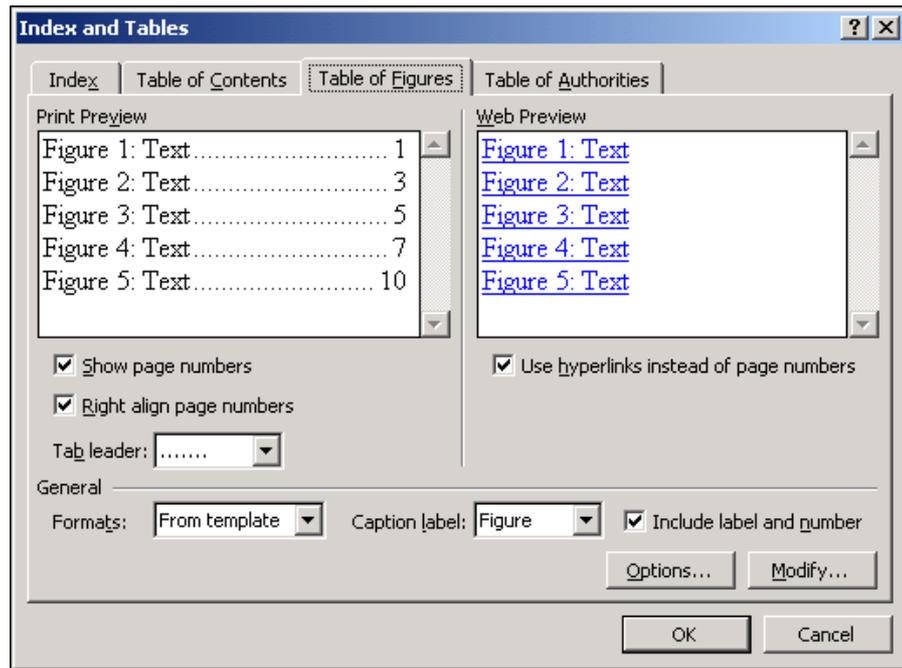
The **Index and Tables** dialog box appears.



- 3 Set **Show levels** to **2**.
- 4 Choose a format from the **Formats** list (refer to the preview to see the different appearances).
- 5 Click on **OK**.
- 6 Scroll up the document to view the Table of Contents.

8.2 Table of Figures

- 1 Position the cursor after the Table of Contents (just before the word Introduction).
- 2 From the menu select **Insert | Reference | Index and Tables...** and select the **Table of Figures** tab.



- 3 Choose **Figure** from the **Caption label** options.
- 4 Choose a format from the **Formats** list and click **OK**.
- 5 Scroll up the document to view the Table of Figures.
- 6 Close the document without saving any changes.

8.3 Updating a Table of Contents or Figures

If, after producing the Table of Contents or Figures, you make amendments to the headings or figures in a document, such as adding, re-ordering or changing the caption or heading titles, these changes will not be reflected automatically in the corresponding Table. You must update the information, which is held by Word as a **field**. To do this, click anywhere within a Table of Contents or Table of Figures to select it, and then either

- click the *right* mouse button and select **Update Field** from the menu
- or
- press the **F9** key on the keyboard.

You can then choose whether to update only the page numbering or the entire table.

Note: If you select the whole document you can update all the fields in the document at once using either the right mouse menu or the F9 key.

8.4 Page numbering

It is conventional to have tables of contents and figures at the beginning of a document, and to omit these pages from the page numbering. To do this the following procedure can be used.

- Insert the tables of contents and figures at the beginning of the document.

- Insert a Section Break after these tables — choose the Next page option.
- With the insertion point after this break set the Header or Footer (depending on where you have positioned your page numbers) properties so that it is *not* Linked to **Previous**. See 6.2.
- With the insertion point after the section break, use the **Format** button in the **Page numbers** dialog box and make sure that the **Continue from previous section** box is not selected.
- Move the insertion point to somewhere before the section break and remove the page numbers for that section — use **View | Header and Footer** and then select and delete the page number.

Note: Page numbering cannot be accessed in **Outline View**.

9 Bookmarks

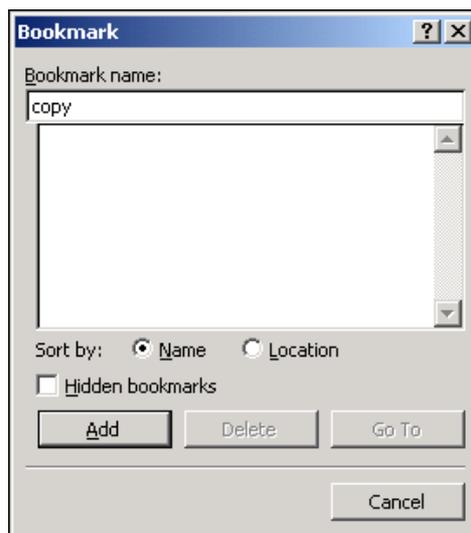
A bookmark is a name you assign to a particular place in a document that lets you jump quickly to that place again, or refer to the text at that place – with a cross reference, for example. A bookmark can mark either an insertion point or a selection of text.

9.1 Inserting a bookmark

- 1 Open the file **T:\its\Word\LongDocs\ResponsibleUse.doc** if it is not already open.
- 2 Scroll through the document to the section heading **Copyright** (you could use the Document Map to locate this heading) and select the heading.

Note: If you do not select any words, a bookmark will be created that only marks the position in the text.

- 3 Select **Insert | Bookmark**.



- 4 Type the name **copy** in the **Bookmark name** box and click the **Add** button.

- 5 Using the same method, insert bookmarks for the headings **Libel** and **Pornography**, giving them appropriate names.

You can use the **Bookmark** dialog box to move to an existing bookmark by selecting the bookmark from the list and clicking the **Go To** button.

- 6 Select **Insert | Bookmark** from the menu and select the bookmark for the heading **Copy** from the list.
- 7 Click the **Go To** button to move to the bookmark.
- 8 Click on the **Close** button.

Note: You can also use the **Edit | Go To** command to move to a bookmark.

9.2 Viewing Bookmarks

Sometimes it is hard to know where a bookmark starts and ends in your document. It is possible to display all the bookmarks on screen.

- 1 Select **Tools | Options** and select the **View** tab.
- 2 Make sure that there is a tick in the **Bookmarks** box and click **OK**.
- 3 Scroll through the document to see how the bookmarks are now displayed.

Text bookmarks are marked by square brackets, and insertion point bookmarks appear as I-beams.

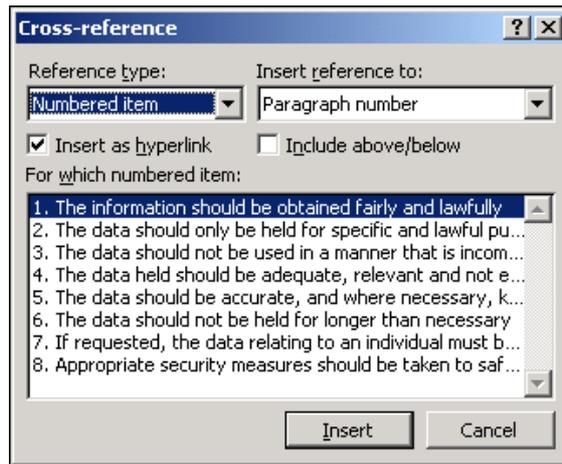
- 4 Select **Tools | Options | View** again and deselect the **Show Bookmarks** option.
- 5 Leave the file open for the exercises on **Cross-referencing**.

10 Cross-referencing

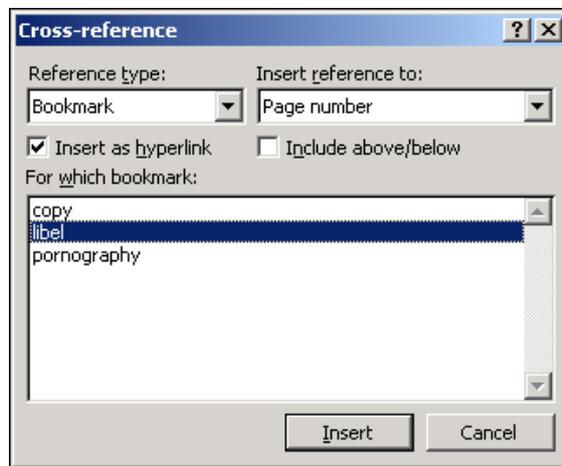
Cross-referencing is used to refer to an item elsewhere in a document. It can be used to refer to items such as Headings, Bookmarks, and Captions. By creating a cross-reference Word will automatically update the page numbers, headings, etc., in the cross-reference, if required.

- 1 Ensure that you have completed the Bookmarks exercise in Section 9 first so that there are 3 bookmarks set in **ResponsibleUse.doc**.
- 2 Scroll through the document to the heading **Using the World Wide Web** and position the cursor after the first yellow highlighted **See page**.
- 3 From the menu select **Insert | Reference | Cross-reference...**

The **Cross-reference** dialog box will appear.



- 4 From **Reference type** choose **Bookmark**. A list of all the bookmarks can now be seen.



Other reference types available here include items such as headings, tables and footnotes.

- 5 From **Insert reference to:** select **Page number**.

Other options here allow you to reference items such as paragraph numbers or text.

- 6 From **For which bookmark:** select **libel**.
- 7 Ensure the **Insert as hyperlink** box is ticked.

If the **Insert as hyperlink** box is ticked a link between the two parts of the document will allow you to move quickly between them on screen.

- 8 Click on **Insert** to create the cross-reference.

The cross-reference dialog box remains on the screen to allow more cross-references to be added.

- 9 Click **Close**.
- 10 The page number now appears after **See page**.

The cross reference is inserted as a field. This will usually show as grey when selected. In the example above it is blue, as the text is highlighted in yellow.

To remove a cross reference simply select and delete the field.

10.1 Using a hyperlink to move to a cross reference

If the **Insert as hyperlink** box is ticked when creating a cross reference, a link between the two parts of the document is inserted which will allow you to move quickly between them on screen.

- 1 Position the mouse pointer over the cross-reference page number, created in the last section – the following appears.



Hold down the CTRL button and click once to move to the associated paragraph.

- 2 Return to the **World Wide Web** section. Using the same method as in steps 3 to 8, add cross references, at the places marked in yellow, to the other two bookmarks. You don't need to close the dialog box after setting the first of these.
- 3 Remove the yellow marking from the three pieces of text. (Select each one and click the **Highlight** button on the toolbar.)
- 4 Close the document without saving any changes.

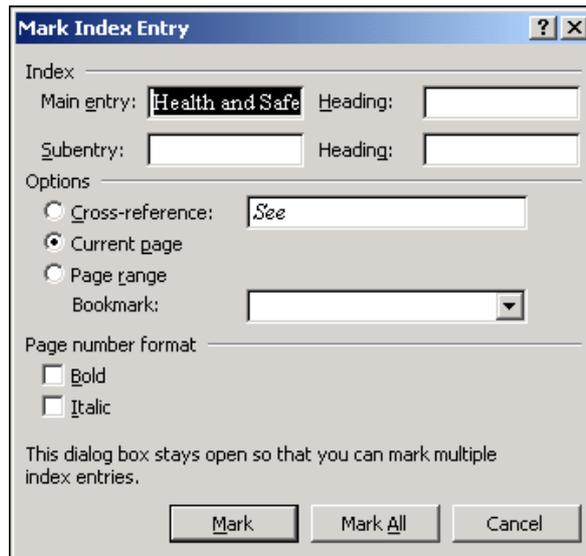
11 Creating an index

An **Index** shows the position of selected words or phrases in a printed document.

In Word there are two stages to creating an index. First mark the text to be included in the index, and then create the index table.

11.1 Marking index entries

- 1 Open the file **T:\its\Word\LongDocs\ResponsibleUse.doc** if it is not already open.
- 2 Highlight the heading **Health and Safety**.
- 3 From the menu select **Insert | Reference | Index and Tables...**
- 4 Select the **Index** tab.
- 5 Click on the **Mark Entry** button to view the **Mark Index Entry** dialog box.



- 6 Ensure **Current page** from **Options** is set. Check **Italic** in **Page number format**:

Note: You can edit the **Main entry** text at this point if you want the text that appears in the index to be different from the text in the document. You can also create a subentry if you think people will look up different words for the topic. For example if the text in the document is about mountaineering you may wish to create a subentry for climbing.

- 7 Click the **Mark All** button to create an index entry for all occurrences of the words **Health and Safety**.

Mark All marks only the first occurrence in each paragraph, so repetitions within a paragraph will not be marked.

- 8 Click **Close**.

{XE "Health and Safety"} now appears after the heading.

The keyboard shortcut **Alt/Shift/X** can be used to create an index.

- 1 Highlight the word **Posture** in the next line. Press **Alt/Shift/X** to view the **Mark Index Entry** dialog box. Re
- 2 Scroll through the document and add two or three more appropriate words to the index.

Indexes are case sensitive. For example **Health** is not the same as **health**.

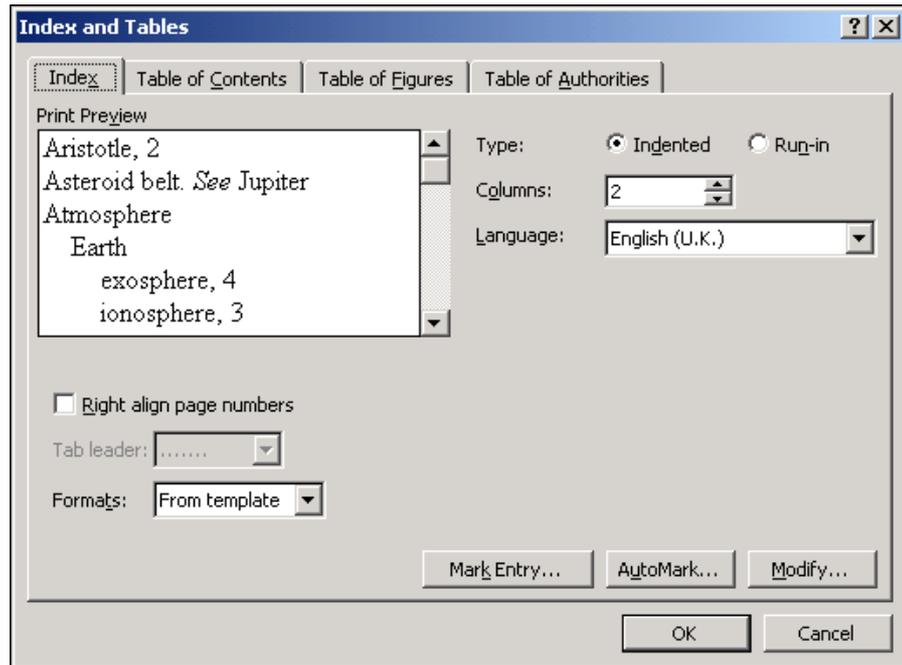
Index entries can also be marked by entering all the words to be indexed in a separate document. Save that document and return to the original document and from the **Index** tab of the **Index and Tables** dialog box click on the **AutoMark** button. Select the created file and Word will automatically index every occurrence of the words.

11.2 Creating an index table

Once index entries have been marked, it is a simple process to create the index table. This is usually placed at the end of the document, perhaps in a separate section.

- 1 Position the cursor at the end of the document and insert a **Next Page Section Break** (see Section 6 on Page 6).
- 2 Select **Insert | Reference | Index and Tables**.

The **Index and Tables** dialog box appears.



- 3 Select the **Index** tab and choose a **Format** from the drop down list.
- 4 Click **OK**.
- 5 Look at the index that has been created.
- 6 Close the document without saving any changes.

12 Master documents

Whilst creating a long document it is often advantageous to split the work into separate files, perhaps one for each chapter. You may be working collaboratively on a document, or you may be constrained by the file space available on a system. Even without these reasons you may wish to have the document in “small chunks” — making it easier to work with.

There are several ways that you can combine files to create a single document and use all the automated features such as tables of contents and indexes. One way is to use the Master Document facility. With this method a **Master Document** is used to plan and amend the final structure of the document, for example the chapter order. The different sections of the document are created in separate files, and when the text in all these is

complete, the Master Document facility can be used to create features such as cross references, a table of figures, an index, and a table of contents. The separate section files are known as **subdocuments**. The Master Document facility will also automatically number the pages and footnotes.

Any changes made to a subdocument become part of the master document.

12.1 Order of work

You can either create the subdocuments first and then combine them into a Master Document, or you can create your Master Document first and create subdocuments from within the Master Document.

For this exercise you are going to create a Master Document and insert three existing files:

Chapter1.doc

Chapter2.doc

Chapter3.doc

Before starting this exercise you **MUST** transfer these files from the T: drive onto the J: drive. *The Master Document facility will not work correctly if you simply open these files from the T: drive.*

- 1 Use My Computer or NT Windows Explorer to transfer the following files to your J: drive on the NPCS.

T:\its\Word\LongDocs\Chapter1.doc

T:\its\Word\LongDocs\Chapter2.doc

T:\its\Word\LongDocs\Chapter3.doc

Alternatively you can download these files from the ITS website http://www.dur.ac.uk/its/Help_and_Info/index.htm

Choose the **Documents** link at the top of the page and then choose **Sample files**.

- 2 Open **Chapter1.doc**

This contains two headings: **Introduction** and **Health and Safety**. Look through the document and notice the following:

- There are page numbers starting at page 1.
- There is one footnote — numbered Footnote 1.
- There is a green highlighted section — this is where you will insert a cross reference later.

- 3 Open **Chapter2.doc**

This contains 3 headings: **Using public computer rooms**, **Using Networked computers** and **Logins and passwords**. Look through the document and notice the following:

- There are page numbers starting at page 1.

- There is one footnote — numbered Footnote 1.
 - There is a picture labelled Figure 1.
 - There is a bookmark called **public**. (Use **Insert | Bookmark** and the **Go to** button to see this.)
- 4 Open **Chapter3.doc**.

This contains 1 heading: **Safeguarding your work**. Look through the document and notice the following:

- There are page numbers starting at page 1.
 - There is a picture labelled Figure 1.
- 5 Close all three files.

12.2 Creating a Master Document

- 1 Open a new document in Word.
- 2 Type the title of the work:

The Responsible Use of Computers
- 3 Press **Enter**.
- 4 Give the title the Style **Heading 1**.
- 5 Make sure the title line is not selected.
- 6 Select **View | Outline**.

At the right of the toolbar are several buttons that are used for Master Documents.

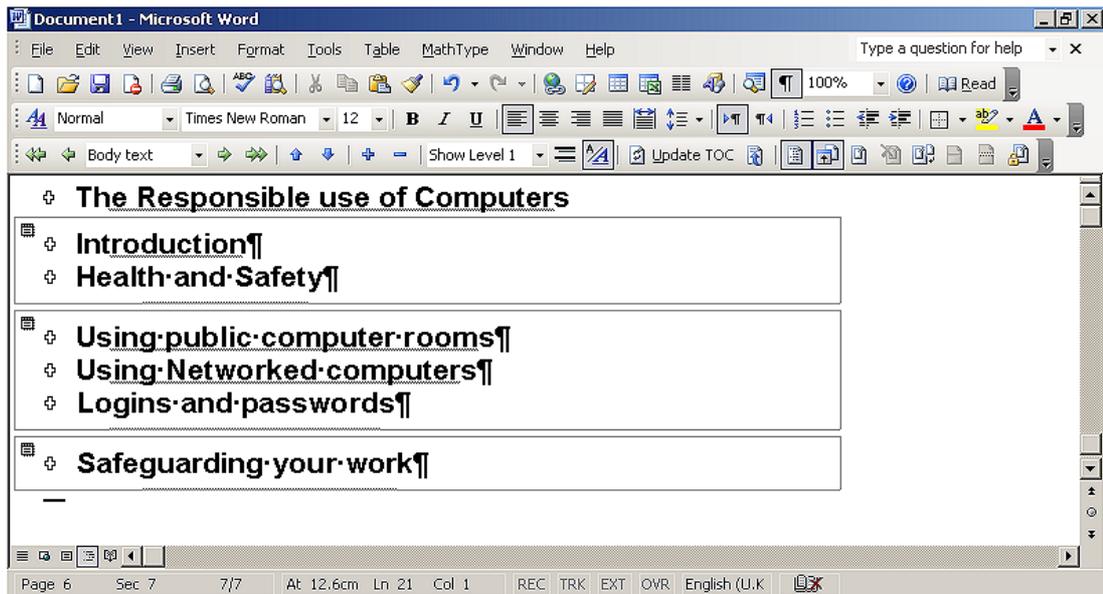


You can now insert the three subdocument files.



- 1 Position the insertion point in the paragraph just below the title.
- 2 Click the **Insert Subdocument** button on the Master Document toolbar.
- 3 Select **Chapter1.doc** and click the **Open** button.
- 4 Repeat steps 2 and 3 so that **Chapter2.doc** and **Chapter3.doc** are inserted.
- 5 From the Outline Toolbar, select the **Show Heading 1** button.

Your screen should now look like this.



- 6 Change to Print Layout View.
- 7 Scroll through the document and notice that the page numbering, caption numbering and footnote numbering are consecutive.
- 8 Move the insertion point to the green highlight on page 1.
- 9 Delete the highlighted text and insert a Cross-reference to the bookmark **public**. Choose the Page number option in the **Insert reference to** box. Refer to Section 10 if necessary.
- 10 Move the insertion point to the end of the title at the beginning of the document.
- 11 Press **Enter** to move to a new paragraph and insert a Table of Contents. See Section 8.1 if necessary.

12.3 Working with a Master Document

As well as adding features such as a table of contents to the Master Document, you can use the Outline View to rearrange the whole document. You can also continue working on the content of the document, either in the Master Document (use Print Layout View) or from within each subdocument.



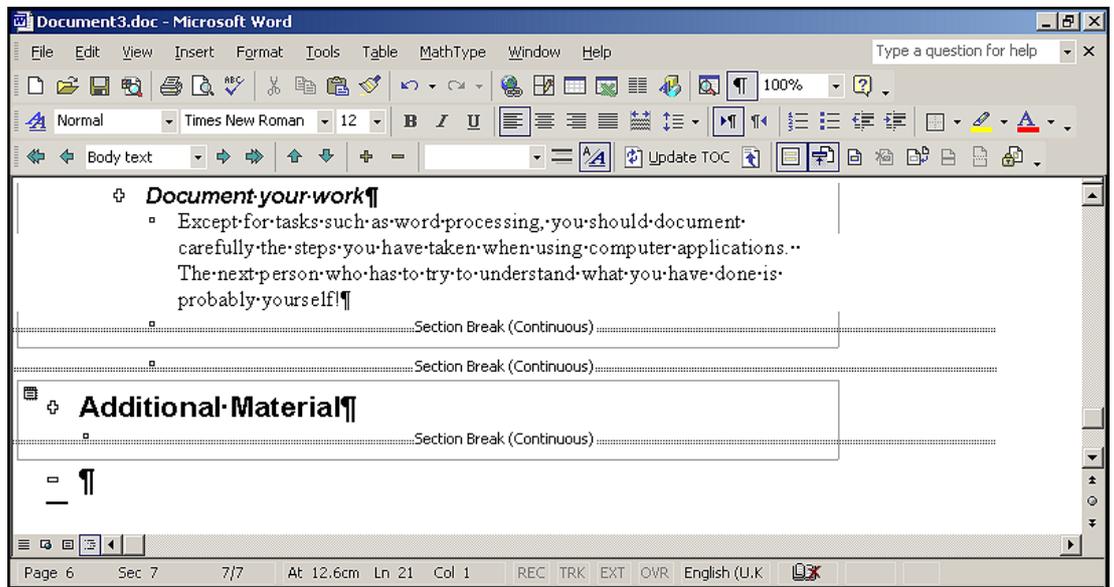
In Outline View each subdocument has an icon. Double-clicking that icon will open the subdocument in a separate window. Any changes you make in the subdocument will be reflected in the Master Document. After opening subdocuments in this way you can return to the Master Document by selecting it from the Task bar at the bottom of the screen.

12.4 Creating new subdocuments

You can create a new subdocument from within the Master Document. The easiest way is to type the new Section or chapter heading within the Master Document and then convert it to a subdocument.

- 1 Make sure you are in Outline View in the Master Document you have just created.
- 2 Click on the **All** button so that all levels of the documents are shown.
- 3 Click on the **Expand Subdocument** button to show all the text.
- 4 Position the insertion point in the last paragraph of the Master Document. Make sure that you position the insertion point in the last paragraph in the Master Document and *not* within the last inserted sub document.
- 5 Type:

Additional Material
- 6 Give this heading the Style **Heading 1**.
- 7 Select the heading you have just added.
- 8 Click the **Create Subdocument** button.



You could now open the subdocuments individually and work on them.

- 13 Return to Word and open **Mymaster.doc**

You will see that the 4 sub-documents are now displayed as hyperlinks. Clicking on a link will open the subdocument in a separate window.



- 14 Click on the **Expand Subdocuments** button to display the contents of the subdocuments.

12.5 Saving a Master Document

When you save a Master Document, all its subdocuments will be saved as well. Word sets up files for any new subdocuments you have added, taking the filename from the text at the beginning of the first paragraph.

12.6 Converting an existing document to use Master Document

It may be that you have already begun working on a long document and then wish to convert this into a Master Document with subdocuments. You can use the method shown in section 12.4

- Open the document and select **View | Outline**.
- Select the text that is to form the first new subdocument.
- On the Master Document toolbar, click the **Create Subdocument** button.
- Repeat this procedure until your document is split into subdocuments.
- Save the Master Document. Word will save all the subdocuments with filenames created from the text at the beginning of the first paragraph.



13 Miscellaneous

13.1 Setting footnotes and page numbers to start at a specified number

If you are not using Master Document, but want to combine the contents of several files into one document, you could copy and paste the information into one document before printing.

If this is not possible due to the constraints of the computer system you are using it may be that your only option is to print out the separate files and combine them after printing. In this case it is possible to set the starting page number of each separate file to reflect its position in the finished document by using the **Format** button in the **Page numbers** dialog box. In the **Start at** box enter the number that is to appear on the first page.

The footnote numbering within each chapter can also be reset to reflect its position in the finished document by using the **Format section** of the **Footnote** dialog box and entering the appropriate number in the **Start at** box.

13.2 Insert File command

You can only have up to 255 subdocuments in a Master Document. If this is a problem, consider using **IncludeText** fields.

Create a new document and enter any text such as the title of a thesis (just as you would do for a master document) and press **Enter**.

To add your existing chapter files, use **Insert | File** and highlight the file to be added. Select the **Link to file** option from the **Insert** drop down menu. Word will insert **IncludeText** fields in the main document, if **Tools | Options | View | Field codes** is ticked

Note that:

- unlike the situation with a master document, the source files are *not* opened as documents when you open the main document (this is an advantage if your computer is running out of memory)
- you can set up cross references across the linked documents

- you can revise styles affecting all the text
- you can't readily open a linked source document from an **IncludeText** field (with a master document you just double-click on the icon for the subdocument)
- changes made to the main document do not automatically appear in the source documents (they can be sent using the **UpdateSource** key which is **Ctrl/Shift/F7**)

13.3 Referenced documents

You may find that using the Master Documents facility does not work well on the PC or network that you are using as it requires a large amount of file space. An alternative is to use Referenced Documents. Whilst not having all the functionality of Master Documents this method uses less working file space. You can create automatic tables of contents, figures and an index using this method, but not cross-references to separate documents. Refer to **Help** (search for **Field codes: RD**) for further information.

14 Tips on creating a long document

14.1 Planning the document

Decide on the general outline first. Divide the work into sections or chapters with headings and sub headings. Use the Outline view to help plan and re-organise the document structure.

Decide at the start which printer will be used for the final version. Prepare samples of typical text and illustrations and print these on the chosen printer. Remember to include any special symbols that you will be using. Consider how to deal with any colour printing you need.

Create your own template to set margins and define styles for the different heading levels. Check how these will look when printed. Consider how the final version will be bound. You can include a gutter margin to take account of the space needed for binding.

14.2 Developing the document

Concentrate on the words first. Time spent on formatting text, etc, at an early stage may be wasted if you make radical changes to the document later.

Use a specialist bibliographic management package such as Endnote to organize your bibliography. (See **Guide 92: Reference management with Endnote.**)

14.3 Splitting the document into separate files

A long document can be managed more effectively if it is split into several files. Try not to have files longer than about 15 – 20 pages. If there are graphics within a document you may need to split it into even smaller chunks.

You need to consider the amount of memory available to Word and the amount of disk space. Word will need at least three times the space occupied by the file itself in order to store work files and a backup copy of the current file whilst you are working on it. The more files that are open simultaneously, the greater the space that will be needed.

The Master Document facility works well if you have plenty of memory and disk space. A master document must be open most of the time that you are editing it or any of its sub-documents, and when the master document is open it loads all of the sub-documents. You may find it more efficient to work on sections separately and combine the files at the end into a Master Document. Doing this at the end will enable you to take advantage of automatic features such as Table of Contents etc.

14.4 File management and backups

Have at least three backups. Rotate these and number the backup files accordingly. You could have three diskettes or Zip disks to hold the backups. Call the first backup file Backup_1 and put it on Disk 1, put the second backup file, Backup_2, on Disk 2 and the third backup file, Backup_3, on Disk 3. At the fourth backup call the file Backup_4 but reuse Disk 1 and delete Backup_1, and so on.

You may find it useful to keep a paper copy of each file. Reprint these at regular intervals.

14.5 Graphics

Create any pictures and graphics as separate files (appropriately labelled) and keep them together in a folder to be added to the document later. Inserting graphics will greatly increase the file size of a document and will slow you down when working on it. Insert captions into the document at the appropriate place plus a reminder of which graphic to insert later. You could type in the file name of the graphic and highlight the text in another colour to make it conspicuous (use the Highlight button).

If you are working on a personal computer and have the required applications you can link items such as illustrations and tables from the original program. For example, an Excel chart can be linked directly into a Word document. Whenever the original Excel data is changed the updated chart appears automatically in the document. Again there are memory and file space considerations to be taken into account when using this method and using this method slows down your work as each time you open the document the corresponding application is opened and the object is updated. For more information refer to ***InfoSheet 97: Transferring information between Windows applications.***

14.6 Automated features

If you use Styles and Captions in your document you can automatically generate Tables of Contents and Figures.

Only very large documents require an index. Think carefully about whether you actually need one, as it is a big undertaking even when using the automatic index facility.

If you want to have automatic cross-referencing within a document, remember that this can only be done in a single file, or when using the Master Document facility.

14.7 Timing

It always takes a lot longer than you think! Allow plenty of time for the final formatting and printing.

14.8 Working collaboratively

There are several facilities in Word that may help if you are working collaboratively on a document. These include:

- **Revision tracking.** This shows the changes that have been made to a document.
- **Inserting comments.** You can add comments that are not part of the text of the document.