

MASTER DOCUMENTS

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NOTE: ANY TEXT IN
[*SQUARE BRACKETS*
AND ITALIC] REFERS TO
THE PC SHORTCUT.

Master Document

Why use a Master Document

- Large files can become corrupt
- Large files are often slow to load and move through
- Large files are sometimes difficult to edit

- Master document allows you to create an automatic table of contents and index for combined files

1. Master documents and subdocuments

A master document serves as a holder for separate files known as subdocuments. While every subdocument is actually a part of the master document, each is also a separate file. Once you've created a master document, you have the ability to view, reorganise, format, proof, print, and create a table of contents for multiple documents as if all the documents were one.

1.1 The relationship between the master and its subdocuments

In simplest terms, a master document is a Word document that contains one or more individual subdocuments. Figure A illustrates the dependant relationship between the master document and the subdocuments it contains.

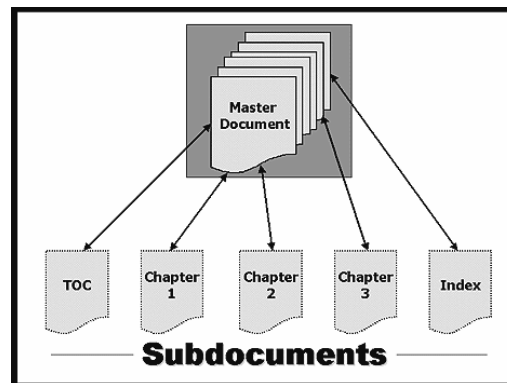


FIGURE A: A MASTER DOCUMENT SERVES AS A CONTAINER FOR ONE OR MORE SUBDOCUMENTS, WHICH WORD STORES AS INDIVIDUAL FILES THAT ARE LINKED TO THE MASTER.

To view and manipulate the components of the master document, you must first switch to Master Document view. When you do, Word displays each of the subdocuments in the order in which they appear within the master. While working in a master document, you can rearrange the order of the subdocuments; you can also make changes globally (across each subdocument).

Because each subdocument is stored as a separate file within the master document, multiple users can edit various subdocuments and Word automatically incorporates all of the changes made to a subdocument into the master document. Therefore, the master document always reflects the most recent version of each subdocument.

1.2 Create a new master document

1. Click **New** button, or **File** Menu — **New**.
2. Switch to master document view. **View** menu — **Outline**.

1.3 To add an existing Word document into a master document

1. Display the master document (in master document view).
2. *Expand* the subdocuments.
3. Click where you want to add the existing document.
4. On the **Master Document** toolbar, click the **Insert Subdocument** button.
5. Select the document you want to add, and then click **Open**.

1.4 To print a master document

1. Display the master document in master document view.
2. *Expand* the subdocuments.
3. *Expand* headings to display as much of the document as you want to print.
4. **File** menu — **Print**.
5. **Print**.

1.5 Working with subdocuments

1.5.1 Opening and editing subdocuments

There are two ways to open a subdocument to begin your work. If you have the master document open and you're in Master Document view, you can open a subdocument from within the master by double-clicking on the subdocument's icon. You can then make changes to the subdocument. When you've finished, save your changes and then choose **File** — **Close** to close the subdocument. Word now reflects all of the changes (made to the subdocument) in the master document.

You can also open a subdocument independently of the master. Choose **File** — **Open** or click the **Open** button on the **Standard** toolbar to display the Open dialog box. Navigate to the location of the subdocument, select it, and then click the **Open** button. Notice that the method for opening a subdocument from the Open dialog box is the same as it is for a regular Word document.

1.5.2 Reorganizing subdocuments

When changing the order in which the subdocuments appear within the master document, you can use either Outline view or Master Document view to do so. The technique and results are the same for both. The only difference is that in Master Document view, Word displays the subdocument icons to the left of each subdocument's heading.

To move an entire subdocument;

1. Delete the subdocument.
2. Re-insert the document into its new location.

1.5.3 Reorganising subdocument content

You may have a situation where you don't want to move an entire subdocument; instead you need to move only a portion of its contents. If that's the case, you can easily move a specific part of a subdocument within a subdocument, or you can move it to another subdocument altogether.

To move a portion of a subdocument's content within the subdocument it currently belongs to, you'll first need to *expand* the master document so you can see its contents. Then, select the content of the subdocument you wish to move and drag-and-drop the selection to a new location.

If you need to move part of a subdocument to another subdocument, you'll also need to *expand* all the levels of the master document. Once you display all of the subdocuments and their components, select the content you want to move, locate the subdocument you wish to move it to, and then drag-and-drop.

CAUTION: It's very easy to move the contents of a subdocument from within the master document; however, you must be very careful not to delete the section breaks that separate each of the subdocuments. If you delete a Section Break between two subdocuments, Word combines the subdocuments, leaving just one subdocument in their places. Also, if you open a subdocument, you'll notice that each section break is followed by a paragraph mark on a new page. Do not delete that mark; it serves as a subdocument divider.

1.5.4 Changing subdocument divisions

It's easy to think of a master document as a book and the subdocuments as chapters of that book. As with writing a book, you may find that creating the perfect chapter (subdocument) isn't always an easy task. Perhaps you have too much information for one subdocument to hold effectively; or possibly you have too many short subdocuments that are lacking cohesiveness. Although it can be difficult to create a set of subdocuments that suit your needs the first time you try, you'll find that a master document provides the tools that make it easy to adjust your subdocuments until you achieve the desired outcome.

1.5.5 Splitting and merging

So, you've put too much information in a single subdocument and now you want to change it. The process is simple:

1. Place your insertion point in the location where you want to split the subdocument (make sure the subdocuments are expanded).

If you need to create a new heading at the location where you want to create the new subdocument, you can do so by entering the text and then applying the same heading style you used for the other subdocument headings.

PLEA

2. When you're ready to split the subdocument into two subdocuments, position the cursor where you want the new subdocument to begin.
3. Click the **Split Subdocument** button on the **Master Document** toolbar. When you do, Word automatically inserts a section break, splitting the subdocument into two subdocuments.
4. Once Word completes the split, choose **File** — **Save** to save the master document. When you do, Word automatically saves the new subdocument to the master and assigns a name to the file using the heading text you selected during the split process.

If you find that you actually have a subdocument that doesn't include enough information to remain as one, you can merge it with another subdocument. To merge subdocuments:

1. Select each of the subdocuments you wish to merge into one, making sure to select the entire contents of each (section breaks included). You can merge any of the subdocuments within the master as long as the subdocuments are next to one another. If the subdocuments you wish to merge aren't in consecutive order, simply move them before completing the merge.
2. Once you've selected the subdocuments, click the **Merge Subdocument** button on the Master Document toolbar. When you do, Word merges the selected subdocuments into one.
3. Once Word completes the merge, choose **File** — **Save** to save the master document. When you do, Word automatically saves the new subdocument to the master and assigns a name to the merged file using the name of the first subdocument. You now have one subdocument; however, the second original document still exists as an individual file outside of the master document. To remove this file, navigate to the appropriate drive location, select the subdocument, and then press the Delete key.

1.5.6 Renaming and moving subdocuments

You can move an entire subdocument file to a different location, while still maintaining its link to the master document. You can also rename a subdocument. To change a file location without breaking the link to the master, you must open the subdocument from within the master document by double-clicking on its icon. While the master document is still open, choose File Save As from the main menu and navigate to the Save In location where you want to store the file. If you want to change the name of the file, enter a new name in the File Name text box. Once you've made your selections, click the Save button, exit the dialog box, and save the master document.

1.5.7 Removing subdocuments from the master

If you want to completely remove a subdocument from the master document, simply select the subdocument and press the Delete key.

2. Styles

*Thesis writers please note: You **MUST** use styles when creating a master document. This means that you **MUST** use styles for headings in your subdocuments (chapters).*

A Style is a set of paragraph and character format options that you name and store. Word comes with a number of pre-determined styles. Using styles can make document formatting faster and more consistent. You can apply a style to any amount of text - from a single word to the whole document. You can save styles with a document and you can also use them in other documents.

The following are the types of styles you can create and apply:

A paragraph style controls all aspects of a paragraph's appearance, such as text alignment, tab stops, line spacing, and borders, and it can include character formatting.

A character style affects selected text within a paragraph, such as the font and size of text, and bold and italic formats.

A table style provides a consistent look to borders, shading, alignment and fonts in tables.

A list style applies similar alignment, numbering or bullet characters, and fonts to lists.


To see what styles are available in your document go to the Style box and click on the pointer.

2.1 Applying a Style

To apply a style to a paragraph, or text, place the insertion point anywhere in the paragraph or select any amount of text, then select the paragraph style from the Style box. The command will affect the whole paragraph. NB: you can also select several paragraphs at once and alter the style.

When you apply a style to a paragraph, you can then select the other paragraphs you want to change and choose *Repeat Style* from the Edit menu to apply the style.

2.2 Working with Styles

The easiest area for working with styles is the **Styles and Formatting** task pane. To open the palette, click the  button on the formatting toolbar or go to the Format menu and select Styles and Formatting.

2.3 Modifying Styles

Click within a piece of text that has the style you wish to modify (or choose the name of the style from those listed on the palette). The style name will appear in the first field in the palette.

Click on the pointer to the right of the style name and choose Modify Style. Select any options you want. To see more options, click Format, and then click the attribute— such as Font or Numbering— that you wish to change. Click OK after you've changed each attribute, and then repeat for any additional attributes you want to change.

To use the modified style in new documents based on the same template, select the **Add to template** check box. Word adds the modified style to the template that is attached to the active document.

To update all text formatted with that style throughout the document click the automatic update button.

2.4 Redefining the Default (Normal) Style

You can modify the formats of the Normal style so that all new documents will take on that format.

1. Open a new document
2. Open the Styles and Formatting palette
3. Click on Normal
4. Make changes
5. Click the Add to Template checkbox.

2.5 Creating New Styles

Using Existing Text:

1. Select a paragraph and format it
2. Click in the Style Text Box
3. Delete the Style name and type a new name
4. Press Enter

2.6 Using the Style Command:

1. Open the Styles and Formatting Palette
2. Click on the New Style button
3. In the window which opens, type a name for the new style in the Name text box and select the type of style you want to create from the *Style type* drop-down list
4. To base the style on another, choose from the *Based on* drop down list.
5. Click on any formatting you require – remember there are more formatting choices under the Format button
6. Click OK to define the style

2.7 Deleting a Style

1. Open the Styles and Formatting Palette
2. Select the style you want to delete
3. Click on the pointer to the right of the style name
4. Click Delete

2.8 Copying a Style to the Normal Template

You can copy styles from one document or template to another. If the copied style has the same name as an existing style in the document to which you copy it, Word will ask you to confirm that you want to replace the existing style.

- Go to the Tools menu and choose Templates and Add-Ins
- Click the Organizer button

Word displays the styles used in the active document or its attached template in the list on the left. Styles used in the Normal document template are listed on the right.

To copy styles to the Normal template,

- Highlight the Style on the left you wish to copy across
- Click the Copy button (Make sure the arrows are pointing the right way)
- Click Close

2.9 Copying a Style to Other Templates or Documents

If you wish to copy the style to a template **other than** the Normal template

Go to the Tools menu and choose Templates and Add-Ins

Click the Organizer button

Word displays the styles used in the active document or its attached template in the list on the left and the styles used in the Normal template on the right.

Click the Close File button under the Normal template (right side). Now click Open File and choose the template or document from the dialogue box, that you wish to copy the style to

Highlight the Style on the left you wish to copy across

Click the Copy button (Make sure the arrows are pointing the right way)

Click Close

Hint:
You can print a list of the styles in your document by selecting Styles from the Print What drop-down list box in the Print dialogue box.

3. What Styles Don't Control

Styles don't control any settings in the Document, Page Setup or Section dialogue boxes. Therefore any changes you make to a style won't affect a document's margins, page orientation, the number of columns on a page, or any printer effects you want to use. In other words, the general layout of your document pages must be set manually. Once you take care of the layout, however, styles make it easy to format the individual paragraphs in a document.

4. Page Numbers

4.1 Adding basic page numbers to headers or footers to your Master Document.

1. Go to your Master Document.
2. **View** Menu, select **Print Layout**.
3. Go the first page 'Title'.

4. **Insert Menu, Page Numbers.**
5. Format as i ii iii.
6. Show number of first page, deselect.
7. Click **OK**.

Scroll down through the pages until you get to main content pages. Note the footer page number is no longer in roman numerals.

1. Click within the Footer/Header, select **Format Page Numbering** from the **Header and Footer Toolbar**. If the toolbar is not available go to the View Menu, Header and Footer.

Footnotes and endnotes

5. Footnotes

5.1 Insert a footnote

1. Click where you want to insert the note reference mark¹.
2. **Insert** menu — choose **Footnote**.
3. Type the note in the footnote panel, and then click in the document to continue typing.

6. Endnotes

Please see the library regarding using Endnote.

Index

7. Index

7.1 Create an index

To create an index, you must first mark the index entries — words, phrases, etc. in your document.

1. Select the text you want to use as an index entry.
2. Press **Command Option Shift x**. [*Alt Shift x*]
3. To create a main index entry, type or edit the text in the **Main Index Entry** dialog box.

To create a subentry, type the text in the **Subentry** box. To include a third level entry, type the subentry text followed by a colon and the text of the third-level entry.

¹ A number, character, or combination of characters that indicates that additional information is contained in a footnote or endnote.

4. To mark the index entry, click **Mark**.

To mark all occurrences of this text in the document, click **Mark All**.

5. To mark additional index entries, select the text or click immediately after it, click in the **Mark Index Entry** dialog box, and then repeat steps 3 and 4.

7.2 Automatically mark index entries by using a concordance file²

Refer to Microsoft Word Help.

7.3 Building an index

1. Mark in the index entries as above (5.1).
2. Open the **Master Document**.
3. Expand the **Sub documents**.
4. Click where you want to insert the finished index.
5. **Insert** menu — **Index and Tables**, and then click the **Index** tab.
6. Use one of the available designs or create your own.

7.4 Updating an index

1. Click in anywhere in the index, and press F9 (function key on your keyboard).

² An index file with a two column table: The first column lists the text in the document that you want to index, the second column lists the index entries to generate from the text in the first column.

Table of contents

NOTE: TURN OFF HYPERLINKS.

OPEN SUBDOCUMENT TO REDEFINE THE TOC STYLES

8. Table of contents (TOC)

8.1 *Creating a table of contents in a master document*

1. Display the master document.
2. Expand the subdocuments,
3. Click where you want to insert the table of contents.
4. **Insert** menu — **Reference, Index and Tables, Table of Contents** tab.
5. To use one of the available designs, click a design under **Formats**, or specify a custom table of contents layout.

8.2 *Updating a table of contents*

1. Click in anywhere in the table of contents, and press F9 (function key on your keyboard).

Note: When you update the entire toc, any text or formatting that you have added will be lost.

9. Table of figures, images, graphs, tables.

9.1 *To create a Table of figures, you have to add captions to your figures (images, graphics, graphs etc.)*

Adding captions manually to an existing figure, images, graph, table or other item

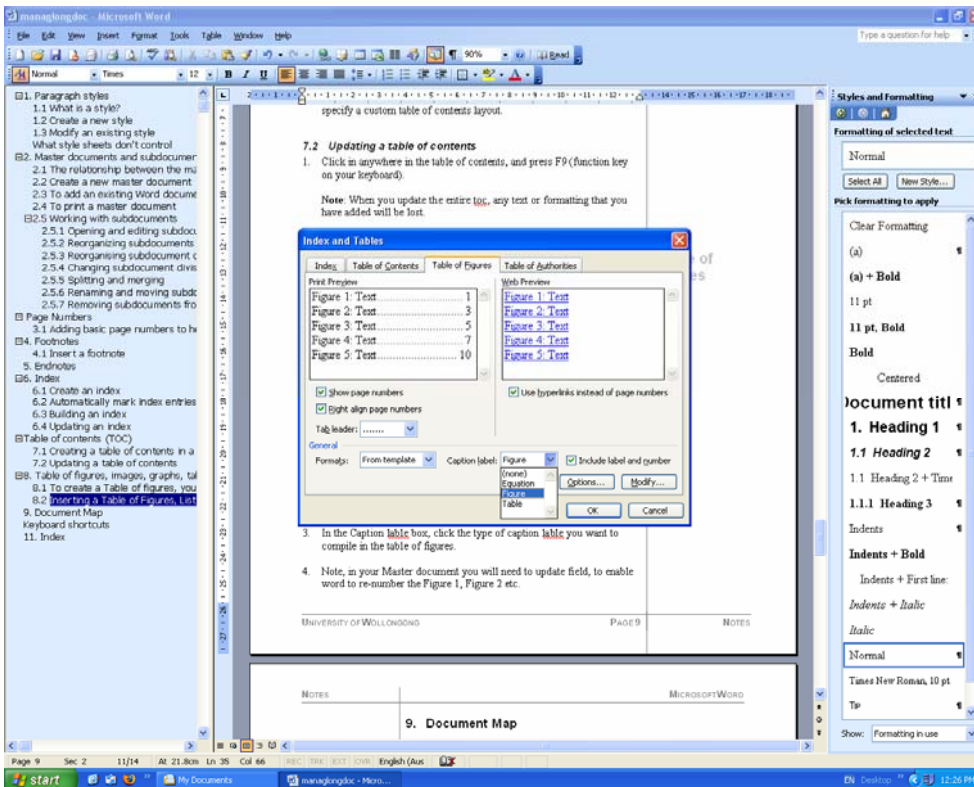
1. Select the item (figure, graph, etc). **Insert** menu, **Reference, Caption**.
2. In the label list, select the item for which you want Word to insert a caption.

9.2 *Inserting a Table of Figures, List of Tables, etc.*

Go to the document where you want to insert the table of figures.

1. **Insert** menu, **Reference, Index and Tables**.
2. Click the **Table of Figures** tab.

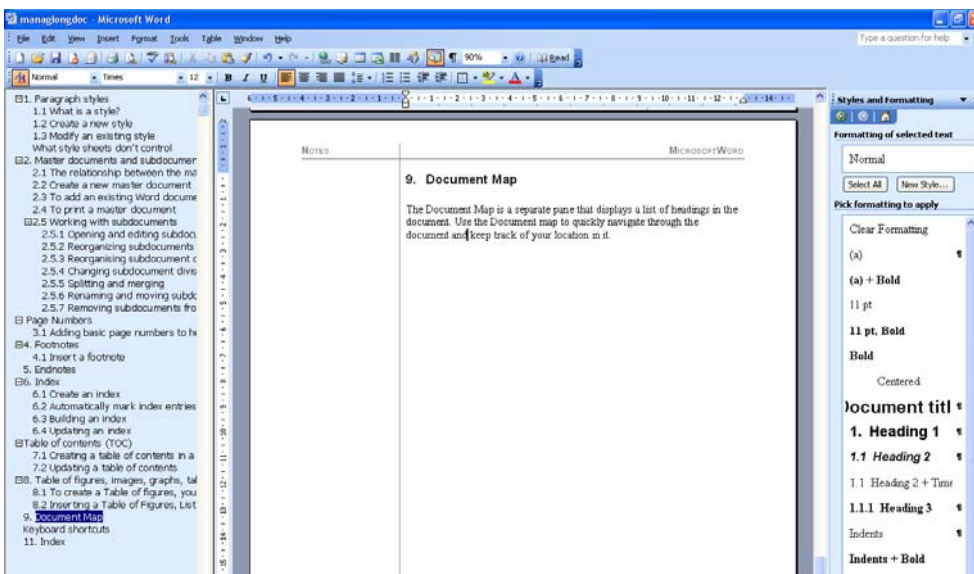
Table of figures



3. In the **Caption label** box, click the type of caption label you want to compile in the table of figures.
4. Note, in your Master document you will need to **update field**, to enable word to re-number the Figure 1, Figure 2 etc.

10. Document Map

The Document Map is a separate pane that displays a list of headings in the document. Use the Document map to quickly navigate through the document and keep track of your location in it.



11. Index

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