



THE UNIVERSITY OF
MELBOURNE

WORKING WITH MASTER DOCUMENTS – WORD 2003

Contents

RECOMMENDATIONS	1
CREATE SEPARATE DOCUMENTS FOR EACH CHAPTER.....	1
USE CONSISTENT PAGE SETUP.	1
USE CONSISTENT STYLE NAMES IN EACH CHAPTER.....	1
INSERT CHAPTERS INTO MASTER DOCUMENT IN ORDER FROM FIRST TO LAST.	1
CHECK THE HEADER AND FOOTER OF THE MASTER DOCUMENT.	1
IF THINGS GET TOO MESSY, CREATE THE MASTER DOCUMENT AGAIN.	1
KEEP ALL DOCUMENTS TOGETHER IN THE SAME DIRECTORY.....	1
BEFORE YOU BEGIN	2
THE OUTLINE VIEW	2
THE LAST WORD.....	2
INSERTING SUBDOCUMENTS	3
WHEN INSERTING SUBDOCUMENTS ENSURE THAT YOU:	3
OTHER ITEMS TO NOTE WHEN IN OUTLINE VIEW	3
BACK IN NORMAL VIEW	3
INSERTING A HEADER AND FOOTER	4
INSERTING A BIBLIOGRAPHY	5
APPLYING A DIFFERENT BIBLIOGRAPHY STYLE	5
INSERTING A TABLE OF CONTENTS (TOC)	6
OTHER TYPES OF TABLES OF CONTENTS	7
CREATING A TITLE PAGE	7
SPELL CHECK.....	8
PRINT PREVIEW.....	8
CREATING A MASTER DOCUMENT – CONDENSED VERSION	9

*For other useful resources visit the
Flexible Learning Delivery Services home page at
<http://www.infodiv.unimelb.edu.au/telars/flds/>*

Recommendations

Please note that the information contained in this document does not describe the **only** way to create and use a Master document, but the **easiest** way to do so.

Create separate documents for each chapter.

Word documents get large very quickly, especially if figures are added. By creating separate documents you will be able to keep the documents at a workable size.

Use consistent page setup.

Ensure you use the same page setup for all chapters to prevent printing and layout problems later on. This is especially true for page size, which should be set to A4.

Use consistent style names in each chapter.

Ensure that you always use Heading 1 for a chapter title, Heading 2 for a main subject title and so on. It doesn't matter what the style definitions are, so long as you use style names consistently throughout the sub documents and ensure that when you create the Master document it has the correct definition for each of the styles you want to use.

When viewed via the Master, sub documents will use style definitions from the Master. When viewed independently, sub documents will use their own style definitions.

Insert chapters into master document in order from first to last.

It is much easier to create a Master in the correct order rather than adding in chapters afterwards.

Check the header and footer of the Master document.

If headers and footers were created within the sub documents, some inconsistencies may appear once all of the sub documents have been inserted into the Master document. Check in *View Header and Footer* to ensure that the headers and footers appear as you expect them to and alter as required.

If things get too messy, create the master document again.

Masters are considered disposable. If the document is not working out, rather than spending too much time on it, it's often quicker (and less frustrating) to create the Master document again. It is safe to do this as deleting the Master document does **not** delete the sub documents.

Keep all documents together in the same directory.

The subdocuments should be kept in the same directory as the Master document. If you move Master and subdocument files to another computer for printing or editing, they should be put into the same named directory as on the original computer. If they are not, the master may not be able to locate the subdocuments when it opens. Use a high level directory (e.g. c:\thesis) to make this process easier.

Also, if you move just the Master document, errors will appear when you attempt to open it. All files must be moved to the new location for the Master to work correctly.

Before you begin

These instructions assume that you have created separate documents for your large document chapters and that these are stored in a directory together. They further assume that each of these documents: currently has no header, footer or page number information; has been created using styles; and has the same page setup information (page size & margins) for each.

The Outline view


The outline view is the place where the subdocuments are linked into the Master document.

1. Open a new document.
2. Create several blank paragraphs by pressing the **Enter** key on your keyboard. Position your insertion point in the middle paragraph. This ensures that you will have space above the inserted text (i.e. for your table of contents) and below the text (i.e. for a bibliography).
3. Save the Master document in the same directory as the subdocuments you wish to use, giving it a logical name such as c:\thesis\master.doc.
4. From the **View** menu select the **Outline** option. The appearance of the screen will change and a new toolbar will be visible.




The arrow buttons  allow you to move text and headings around in the document, and to quickly apply styles to text (more information is given about this function in the **Formatting with Styles** module, or from the online **Help**).



The following buttons   determine how much text will be visible. For example, selecting the **Show All Levels** option will display all text, but selecting **Show Level 1** will display Heading 1 text only.

The next couple of buttons  allow you to update or locate the table of contents – a very handy feature as the table of contents may be inserted anywhere in Master document and therefore may be difficult to find.


The following button  hides or displays the Master document buttons.

The final group of buttons  control the Master document functions: allowing you to add and remove documents from the Master; merge documents together or split them apart; display all subdocuments as links or lock them to prevent accidental editing. The available buttons vary depending on the selections made in your document, just as Edit Cut is not available unless text is selected first.

The last word

The Expand Subdocuments button  is the most important one. When you re-open your master document all you will see are blue hyperlinks plus any text you typed directly into the Master document (such as a title page). Change to Outline view and click Expand Subdocuments to see your text restored. When subdocuments are expanded it changes to Collapse Subdocuments .

Inserting subdocuments

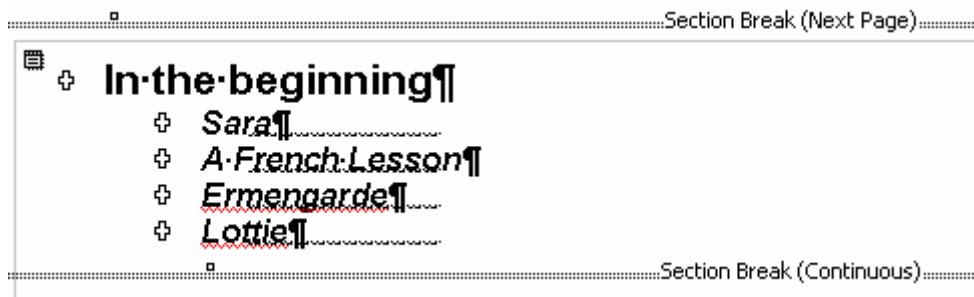
1. Ensure the insertion point is in a paragraph with blank paragraphs above and below, as this makes editing afterwards easier.
2. From the **Outline** toolbar select the **Insert Subdocument** button. 
3. An open file dialog box will appear, asking you to locate the document you want to insert. Locate the directory where your chapters are kept and insert the first chapter into your Master.
4. Repeat steps 2 and 3 until all chapters are inserted.
5. Use the **View** menu, **Normal** option to return to Normal view.
6. **Save** the Master document.


When inserting subdocuments ensure that you:

- Insert the chapters into the master in the order they will appear in the final document.
- Be very careful not to click inside the master document, as this will move the insertion point. The scroll bars can be used to view a different part of the file.

Other items to note when in Outline view

- When a subdocument is inserted, a section break is inserted above and below and a grey marquee surrounds the text within the subdocument. Note: the section breaks may not always be visible in Outline view.







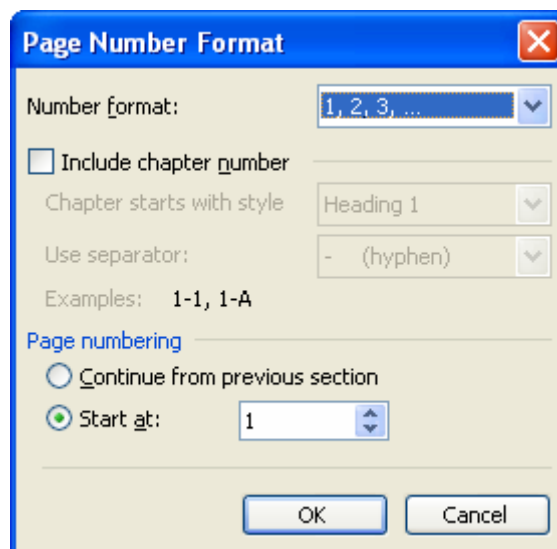
- In the top left corner of each subdocument there is a small square. Double clicking this square will open the subdocument in its own window, ready for editing.
- When you close a Master document, then reopen it, the subdocuments are displayed as links. Clicking a link will open the document in its own window ready for editing. Use the Expand Subdocuments button  from the Outline view to display subdocument text. Sub documents must be expanded in order to create a table of contents, bibliography or to work with headers and footers.

Back in Normal view

When you return to Normal or Print Layout view, scroll through the Master document to assure yourself that all subdocuments are inserted and in the correct position. If things are not as you expect them, it's often quickest and easiest to create another Master from scratch.

Inserting a header and footer

1. Position the insertion point in the first subdocument.
2. From the **View** menu select the **Header and Footer** option. By default the header for the section where your insertion point was located is displayed, plus a floating Header and Footer toolbar is visible.
3. Turn off the **Same as Previous** button  so that any changes you make to this header do not happen to earlier sections, and type in a suitable header.
4. Use the **Switch Between Header/Footer** button  from the floating toolbar to move to the footer area.
5. Again turn off **Same as Previous**, this time for the footer.
6. Type in the footer text and from the floating toolbar click the **Insert Page Number** button.  If the page number that appears does not start at the correct number, or appear in the correct style, click on the **Format Page Number** button. 
7. The following dialog appears:



8. From the **Number format** option select the required numbering style.
9. From the **Page numbering** option select **Start at:** and ensure it says **1**.
10. Click **OK**.
11. Click the **Close** button on the Headers and Footers toolbar to return to **Normal** view, else from the **View** menu select **Header and Footer** again to turn off.

You should now have a Master document with subdocuments inserted that contain headers and footers, but with no header and footer text in the first section before chapter one.


You can use the Show Next button to move through the document, checking the headers and footers and altering as required. More information on using different headers and footers can be found in the Skills for Complex Documents document of this series available online from


<http://www.infodiv.unimelb.edu.au/telars/fls/guides.html>

Inserting a bibliography

To successfully build a bibliography from a Master document, first ensure that you **Unformat Citations** in each of the sub documents. This will ensure that when the bibliography is created, it is a single bibliography at the end of your Master document.

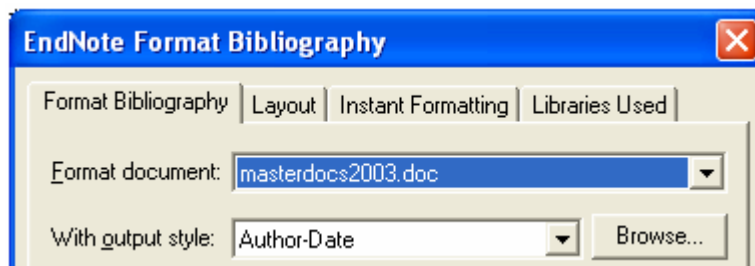
These instructions assume that you have already inserted EndNote citations into your document and are not using the automatic formatting option available in EndNote 6. The sample chapter1-6 documents have some citations from the Paleo library file inserted.

Special Note: All the subdocuments in a Master must be expanded in order to build a bibliography from them. If you are viewing the links of your subdocuments rather than text, return to **Outline** view, and click on the **Expand Subdocuments** button. 

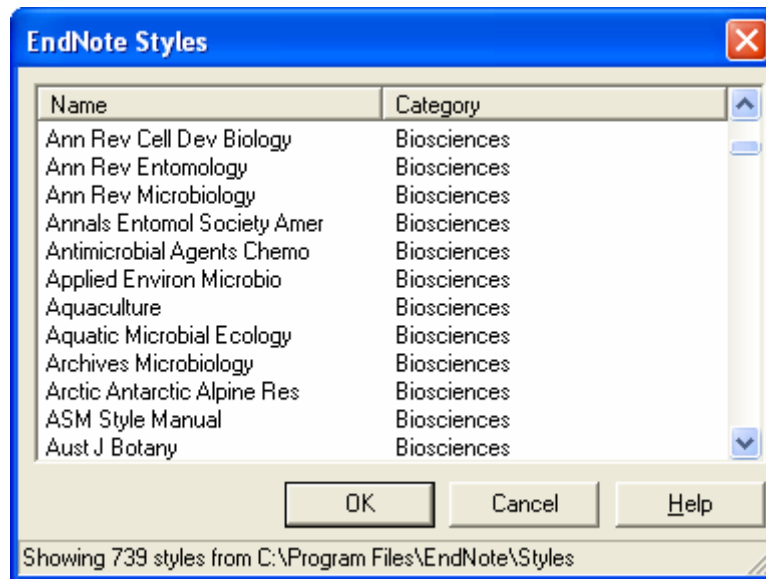
1. Ensure you are in **Normal** view, as EndNote does not like to create a bibliography when in Print Layout or Outline view.
2. Ensure there is a blank paragraph at the end of your Master document for the bibliography to go into.
3. From the **Tools** menu select **Go To EndNote**.
4. When prompted, open the library file that your citations were inserted from.
5. You have several options for creating a bibliography:
 - In Word from the **Tools** menu **EndNote** sub menu choose **Format Bibliography**, or
 - In the Word toolbar area click the **Format Bibliography** button , or
 - In EndNote from the **Tools** menu select **Cite While You Write** sub menu and choose **Format Bibliography**.
6. EndNote will prompt you with a dialog to confirm the document to be formatted and the style for your bibliography. Click the **Format** button to start.
7. If EndNote has problems identifying any of the citations, it will present an error message. Otherwise the citations will be formatted and the bibliography for all chapters will appear at the end of the Master document.

Applying a different bibliography style

1. Select another bibliography style from the **With output style** pull down menu in the dialog box.



2. This will allow you to select from a predefined list of styles. If the style you want is not listed, click the **Browse** button to view more options.

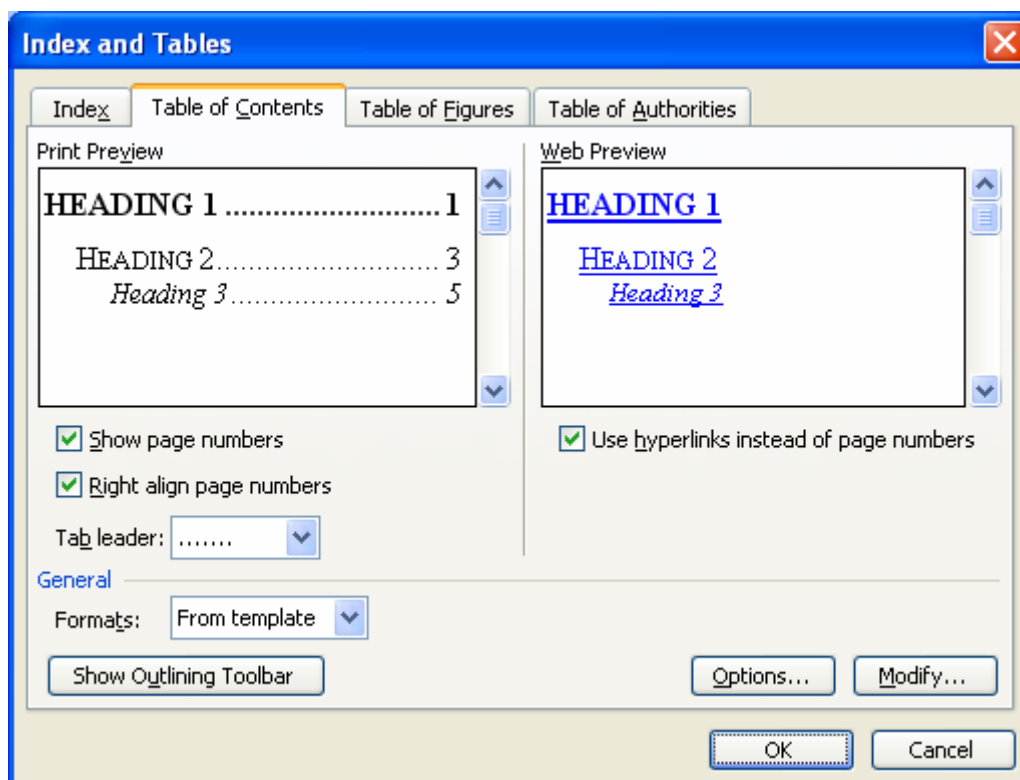


Select the desired style and click **OK** to return to the *Format Bibliography* dialog.

More information on EndNote can be found at www.lib.unimelb.edu.au/endnote and from the online help within the EndNote program.

Inserting a table of contents (toc)

1. Position the insertion point in a blank paragraph above the first subdocument.
Note: be careful to complete this step, as a toc will insert wherever your insertion point is, even if it's at the end of your document.
2. Ensure the Master document has subdocuments expanded (all text visible).
3. From the **Insert** menu select **References, Index and Tables** option to have the following dialog appear (*hint:* ensure you click on the Table of Contents tab).



4. Select a pre-defined style for your TOC from the **General Formats** option.
5. Select preferences such as 'Show levels', 'Show page numbers' and 'Right align'.
6. Click the **OK** button to create.

To update a TOC:

1. Make any editing changes as required to the text of the document (not the TOC itself).
2. Click your insertion point on the existing TOC (Note if using a version of Word prior to XP, click to the left of the TOC instead of on it, otherwise you will be transported to that section of the document).
3. Press the **F9** key on your keyboard.



4. Choose whether to update the page numbers only or the entire document.
5. Click **OK**.

Other types of tables of contents

The methods used for creating and updating a Table of Figure, Tables or Equations are very similar to the processes described above, except that when you go to the **Insert** menu and select the **Index and Tables** option you must click on the Table of Figures tab for all of these.

Tables of Figures, Tables and Equations are created only if these items were captioned in the documents. More information may be found in the Figures, Tables and Equations document of this series, available online at <http://www.infodiv.unimelb.edu.au/telars/flds/guides.html>

Creating a title page

1. Click an insertion point in a blank paragraph above the table of contents.
2. From the **Insert** menu select **Break** and insert a **Next Page** Section Break.
3. From the **View** menu select the **Header and Footer** option.
4. Ensure you are viewing the section that contains the table of contents and turn off the **Same As Previous** button in the header and the footer.
5. Use the **Show Previous** button to go the first section and then remove any text from the header and the footer.
6. Return to **View Normal**.
7. Type in the text for your title page and format as desired.

8. **Optional:** Use the *File* menu, *Page Setup* option to change the *Layout, Vertical Alignment* to *Centre*. This will allow you to centre the text within the section without having to play around with paragraph formatting options.

Note: The method described above inserts title text directly into the Master document. If you delete the Master document, the text must be re-entered. An alternative is if you already have a separate file for the title and declaration text, this may be inserted into the Master along with the other sub documents.

Checking the document

Before printing a document it is strongly recommended that you first spell check and then view it via print preview.

Spell Check

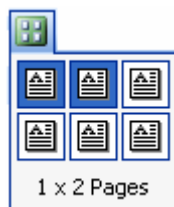
By default the spell check tool is active and will display a red wavy line underneath any word that does not match a word in its dictionary.

To manually start the spell check, from the *Tools* menu select *Spelling and Grammar*.

The process starts automatically, checking both grammar and spelling. You will be prompted with a dialog box to select and confirm any changes.

Print Preview

1. From the *File* menu select the *Print Preview* option.
2. Use the *Multiple pages* button to view two pages at a time. Two pages give you the ability to see page layout clearly.



3. Use the scroll bars to move through the document.

It is best to start at the beginning of the document and work your way through to the end. If you see a problem (for example a bad page break) and want to go fix it immediately, return to Normal view, fix the problem then return to Print Preview and continue from that page.

Creating a Master document – condensed version

1. Open a *new*, blank document and save it with the name c:\training\Master (or something suitable).
2. Ensure it has the *page setup* you require, for example, A4, correct margins.
3. Insert several blank paragraphs and position the cursor in a middle paragraph.
4. Change to *Outline* view.
5. Use the *Insert Subdocuments* button to insert the chapters one after the other in correct order. Take care that you do not accidentally move the insertion point once the process starts.
6. Save the Master and change back to *Normal* view.
7. Click the insertion point in the section where the first chapter starts (most likely the second section) and use *View Header and Footer* option to create header/footer and page numbers for the Master document.
8. Still viewing the header/footer of the second section, turn off the *Same as Previous* option and then use the *Show Previous* button to move to the first section where the Table of Contents and title will be created.
9. In the first section remove all header and footer information and insert a roman numeral.
10. *Close* the *Header and Footer* view and return to *Normal* view. *Save* the Master.
11. Create a title for the bibliography at the end of the document, using heading styles so that it will be included in the Table of Contents.
12. Use the *Tools, EndNote 6, Format Bibliography* option to create a bibliography for the Master Note: you will have to open the Paleo EndNote library file in order to create the bibliography.
13. Move the insertion point to the first section. *Insert* a *Table of Contents* and underneath that a *Table of Figures*.
14. *Insert* a *Next Page section break* above the Table of Contents.
15. *View Header and Footer* for the second section (where the Table of Contents is) and turn off *Same as Previous*. Use *Show Previous* and remove the Roman numerals from Section 1 (this is where the Title page will go).
16. Return to *Normal* view and save the Master.
17. In the first section type the title page and format as required. Use the *Page Setup, Layout* tab to set the *Vertical Alignment* options for the title page.
18. *Save* the Master, do a *spell check* and use *Print Preview* to check the layout before printing.
19. Your master document should now be complete!