

## Working with Large Documents

### What you can expect to learn from this class:

- How to use and create Footnotes and Endnotes.
- How to use Cross-references and captions.
- How to organize a document in Outline view.
- How to use Master Documents.
- How to create Indexes and Table of Contents.

### Who should take this class?:

Any person with a basic knowledge of computers and Microsoft Word, and who is interested in learning how to create the helpful additions to word documents.

### Quick Tips: Keystrokes to Remember

**Command-Z** to **Undo** the last change.

**Command-C** to **Copy** text or graphics.

**Command-X** to **Cut** text or graphics.

**Command-V** to **Paste** text or graphics.

**Command-A** to **Select All** in a document or window.

**Command-S** to perform a **Quick Save**.

**Option-Click** on any of the boxes in a window's **Title** bar to affect all open windows.

**Shift-Click** to select a group of files.

**Command-Option-Escape**: forces a program to quit when it freezes.

**Command-Control-Power-Key** to restart a frozen computer.

## Toolbars

Before creating Footnotes/Endnotes, Cross-References, Table of Contents and the Index for your document, it is necessary to make sure we have the correct toolbars accessible.

1. Go to **View > Toolbars > Customize**.
2. Make sure the **Standard** and the **Formatting** toolbars have a check next to their name.
3. Press **Ok**.

## Footnotes and Endnotes

Footnotes and Endnotes are used in documents to further explain, describe, or provide further references for typed information in a document. Footnotes usually appear at the end of a page in a document, while Endnotes appear at the end of the entire document.

### *Insert a Footnote/Endnote*

1. In the **View** menu, change the layout to **Print Layout**.
2. Click where you want to insert the **Note Reference Mark**.
3. Go to **Insert > Reference > Footnote**.
4. Choose Footnote or Endnote.
5. Choose the type numbering you would like.
6. To change the position of where the notes are placed, press the **Option** button. Choose a destination.
7. Click **OK** when you are finished.
8. Type the note text.
9. Scroll to where you wish to resume typing and type.

### *Viewing Footnotes/Endnotes*

1. In your Word document, move your mouse over the **Note Reference Mark**. A window will pop up displaying the note text.
2. OR, Change the View to **Normal**.
3. Go to **View > Footnotes**. (You are able to see the footnotes on the bottom portion of the page).

## Captions

A caption is a numbered label, (i.e.- *Figure 1*), that can be added to a table, figure, equation, or other item.

### *Adding Captions*

1. Go to **Insert > Reference > Caption**.

2. Under the **Options** section, choose the type of **Label** you want to use.
3. Type a **caption description**.
4. To change the type of numbering, click the **Numbering** button.
5. Click **OK** when you are finished.
6. You can add additional text to the **caption**.

## Cross-References

A **Cross-reference** refers to an item/section/caption that appears in a different location in the document. One example is, “See Figure 4 on page12.” Items to cross reference are: *figures, tables, footnote, endnote, numbered item, heading, bookmark, or equation.*

### *Creating Cross-References*

1. After inserting an item to cross reference, type introductory text below the item (i.e.- *For more information, see*).
2. Go to **Cross-reference** in the **Insert** menu.
3. In the **Reference Type**, choose the type of item you want to insert in the document.
4. In the **For Which** section, select the specific section/item you want to refer.
5. If you would like users to jump to a referenced item, select the **Insert as hyperlink** box.
6. Click **insert** and return to the document.

## Master Documents

A Master Document is a large document that contains a set of smaller, related sub-documents. Master Documents, for example can be used to organize chapters of a book. The sections are organized in a way that can be stored on a shared network, which would allow multiple people to work on different sections of the document at the same time.

### *Creating a New Master Document*

1. Go to **File > New** and select **Blank Document** in the right-hand column of the screen.
2. Go to **View > Outline**.
3. Create an **Outline** of the master document.
  - a. In **Outline View**, type headings for the document title and subdocuments. (Work automatically formats the heading with a programmed heading style).
  - b. Assign a heading style for each type of heading. (Use Heading 1 for the title, and use Heading 2 for each subdocument, and use Heading 3 for each sub-topic in each subdocument. To do this, drag the – or + sign to the left or the right to demote or promote the heading.

- i. To **demote** a heading to a lower level, press the **Tab** key or drag symbol to the right.
  - ii. To **promote** a heading to a higher level, press **Shift + Tab** key or drag symbol to the left.
4. Highlight the sections that you wish to make subdocuments.
5. Click on the **Create Subdocument** button, in the **Master Document** toolbar.



6. To save the Master Document and the subdocuments, go to **File > Save As**.
    - a. Create a **New Folder** and save the main document inside of this folder.
    - b. Word automatically assigns a title for each subdocument based off the first characters in the subdocument's title.

**\*NOTE:** If the **Create Subdocument** button is not accessible, you need to click the **Expand Subdocument** (Two document icon with a down-arrow).

### *Open Subdocuments from Master Document*

1. In order to work with the Subdocuments, you must make sure they are unlocked.
  - a. Open the main master document, and go to **View > Outline**.
  - b. On the **Master Document** toolbar, click the **Expand Subdocuments button** (two document icon with a down arrow).
  - c. Click anywhere in the subdocument, you want to unlock.
  - d. On the **Master Document** toolbar, click the lock button icon.
2. Make sure you are in **Master Document** layout.
  - a. If subdocuments are collapsed, click the blue-underlined hyperlink.
  - b. If subdocuments are already expanded, double click on subdocument icon (left upper corner of each subdocument).

### *Rearranging Subdocuments within a Master Document*

1. Make sure you are in **Outline** mode/layout.
2. Expand the subdocuments by pressing the icon (two document icon with a down arrow).
3. Unlock any subdocuments.
4. Select the subdocument icon (located in upper left corner of each subdocument box).
5. Click and drag the icon to desired location.

### *Split/Combine a Subdocument into Two*

1. Make sure you are in **Outline** mode/layout.
2. Expand the subdocuments by pressing the icon (two document icon with a down arrow).
3. Unlock any subdocuments (using lock icon).

4. Create a heading for the new subdocument.
5. Select the new heading.
6. On the **Master Document Toolbar**, click the **Split Document** icon (ripped piece of paper icon).
7. To combine subdocuments, follow steps 1-3.
8. Click the first subdocument icon (upper left corner of each subdocument box).
9. Shift-click the second subdocument you wish to combine.
10. Click the **Merge Subdocument** icon (piece of split paper icon).

### ***Make a Subdocument a part of the Master Document***

1. Make sure you are in **Outline** mode/layout.
2. Expand the subdocuments by pressing the icon (two document icon with a down arrow).
3. Unlock any subdocuments (using lock icon).
4. Click the **Subdocument icon** (upper left hand corner of each subdocument box).
5. In the **Master Document Toolbar**, click the **Remove Subdocument** icon (paper with red x).

### ***Printing a Master Document and Subdocuments***

To print the entire Document (Master and subdocuments):

1. Expand the subdocuments.
2. Go to **File > Print**.

To specify printing:

1. Make sure you are in the **Outline** mode/layout.
2. Expand the subdocuments
3. Expand or collapse headings to display as much of the document as you want to print by pressing the numbers on the outline toolbar (1, 2, 3, ...).
4. Go to **Print** in the **File** menu.
5. Set the printer settings to specific pages and print.

## **Table of Contents and Indexes**

Creating a Table of Contents and an Index entitles you to select pre-written text in your document. It is best to create these two additions after your document has been created and edited, but it is possible to always go back and revise mistakes.

### ***Style***

The Style list, located in the **Formatting** toolbar (to the left of the **Font** pull down menu), also known as the Style Preview, shows many formats associated with your styles. They are predefined paragraph formats to apply to headings and document layouts. You can also create your own paragraph style.

Once your document is created, you will use the **Style** list to designate specific headings for the different sections in your document.

1. Open your document.
2. Highlight the first HEADING.
3. Go to the **Style** menu and select **Heading 1**
4. Change the **Font** style, **Size**, and whether you want it **Bold**, *Italicized*, or **Underlined**.
5. Go to the **Style** menu again and select **Heading 1** again.
6. A window should pop up, select the option that says:
  - **Update the style to reflect future changes.**
7. Repeat steps 2-7 for your consecutive headings.

To create a new heading without changing the pre-set **Headings 1, 2, & 3:**

1. Highlight the text and change the formatting.
2. Click in the **Style** name box.
3. Type in a name for the new style (i.e., Main Heading) in the style box; press **Return**.

**NOTE:** this style is only available in this document. To create a global style, available in all new documents, use the Organizer.

*To make a style available in all new documents:*

1. Open the document where the style is currently available.
2. Select **Style** from the **Format** menu.
3. Click on the **Organizer** button.
4. Select the **Style** from the left column.
5. Click on the **Copy** button to copy the style to the **normal.dot** file, making it available to all new documents.
6. Click **Close** to close the dialog box.

### *Tables of Contents*

Once you have highlighted and changed all of your primary headings by using the **Style** menu, you are able to create your **Tables of Contents**.

1. Place the cursor in the document where you would like the Table of Contents to appear.
2. Go to **Insert > Reference > Index and Tables**.
3. Click on the **Table of Contents** tab.
4. In the **Format** box, in the upper left hand corner, there is a list of different pre-set formatted types of tables of contents.
5. Choose any of the following pre-set styles: **Classic**, **Distinctive**, **Fancy**, **Modern**, **Formal**, or **Simple**. (A sample of what it would look like will appear in the right hand corner of the window).

6. Click **OK**.

The **Table of Contents** should appear wherever you placed your cursor. Simply add a title “Table of Contents” above the list. You used a pre-set style to create your Table of Contents, but you can also create your own.

*To create your own style of the Table of Contents:*

1. Place the cursor in the document where you would like the Table of Contents to appear.
2. Go to **Insert > Reference > Index and Tables**.
3. Click on the **Table of Contents** tab.
4. Choose **From Template**.
5. Click the **Modify** button.
6. Under the **Styles** section, there is a list of TOC’s (table of contents). Depending on the amount of HEADINGS you personalized in your document, you can change how they would appear in the Table of Contents.
  - a. Click on **TOC 1**. Notice how the **font**, **size**, and **location** are displayed.
  - b. Click on the other **TOC’s** to see the differences between how the headings will appear.
7. Click the **Modify** button.
8. Click on the **Format** pull down menu and select the following options to change the font, paragraph, tabs, borders, . . . .
9. Do this for each one of your headings.
10. Click **Apply**.
11. Click **Ok**.

The Table of Contents should appear, according to your personalized settings.

## **Index**

Indexes are extremely helpful as a reference resource in a large document, i.e. a book. To create an index:

1. Highlight the word that you want to put in the index reference list.
2. Go to **Insert > Reference > Index and Tables**.
3. Click on the **Index** tab.
4. Click on **Mark Entry**.
5. A prompt window should pop up.
  - a. **Mark Entry:** the word that will appear in the index list (the word that you highlighted).
  - b. **Subentry:** if you want there to be an additional subentry below the Mark Entry in the index list, type that information there.
  - c. **Options:** under this section you can choose the following:

- **Cross Reference:** rather than listing a page number next to the word that you highlighted, it will say *See [type a word for it to refer to].*
  - **Current Page:** the current page number will appear after the word that you highlighted.
  - **Page Range Book-Mark:** allows you to direct the user to multiple pages that will appear after the highlighted word.
- d. **Page Number Format:** allows you to select whether you want the page numbers to be **BOLD** or *Italicized*.
6. Fill in the proper information for the word that you highlighted and press either **Mark**, which will mark that particular word once, or **Mark All**, which will mark all of the same words throughout the document.
  7. Do this for all of the words that you would like to refer to in the index.
  8. Place the cursor at the end of the document or wherever you would like to insert the index in the document.
  9. Go to **Insert > Reference > Index and Tables**.
  10. Choose the **Type, Style, and the number of columns**.
  11. Press **OK** when you are finished. The index should insert into the document.

Some resources obtained from Microsoft Office Word 2002 Help menu.