

# WORD DOCUMENT MANAGEMENT

## OFFICE 97

Word Document Management covers Word features that are used when creating long documents and will assist attendees in preparing for Microsoft Word expert certification. The workshop will introduce you to indexing, table of contents, outlines and more.

### Generating an Outline

For document organization, ease of navigation in large files, outlining allows you to assign “levels” to your document. You can then expand or collapse the document to view only the titles/headings or to view the entire thing. Also, the Document Map then becomes a navigation aid, letting you move to different areas of the file by clicking on the heading.



- You can create an outline in “Outline View”, which brings up the Outlining Toolbar with many of the tools you can use/need for the process. Go to View/Outline, or click the Outline View button (at left).



- In Outline View, the headings are denoted with a plus or minus sign, depending on what is below them. If a heading has information “within” it, it is a plus.
- You can use the arrow keys to Promote and Demote headings. Use the Style box to see the level number you are currently applying.
- Each marked item (headings as well as body text) can be moved around the document using the up and down arrows. It will move one paragraph at a time, unless you have selected multiple paragraphs.
- The plus and minus keys are “Expand” and “Collapse”. When you click in a heading row, the Expand will show all that is contained below it. Collapse will hide the body text and/or inferior headings within it.



- The numbered buttons will show you the level you click and above. So clicking on the “3” will show you levels 1, 2, and 3. Clicking “All” will show the entire document, including the body text.

### Using Master Document

Master documents and Sub-Documents allow you to break a large file down into several independent sub-files. This will be good for a collaborative project, as well as for a large project that you will take with you and work on away from the office.

To create a new Master Document:

- 1 Create a New, blank document.
- 2 Switch to master document view.
- 3 Create an outline of the master document.

To create a Master Document from an existing document:

- 1 Open the existing document.
- 2 Switch to master document view.
- 3 Set up an outline using the built-in heading styles or outline levels.

For each document, complete the following steps:

- 4 Select the headings and text you want to divide into subdocuments.  
Make sure that the first heading in the selection is formatted with the heading style or outline level you want to use at the beginning of each subdocument. For example, if the selection begins with Heading 2, Word creates a new subdocument at each Heading 2 in the selected text.
  - 5 On the Master Document toolbar, click Create Subdocument.
  - 6 To save the new master document and its subdocuments, click Save As on the File menu.
  - 7 Enter a file name and location for the master document, and then click Save.
- Word assigns a file name to each subdocument based on the first characters in the subdocument's heading. Each file is stored in the same location (folder) as the Master Document. You can double-click the sub-document icon (at left) that appears beside each heading to edit that document. Or, you can edit it directly by opening it through the File/Open... dialog box.
  - Sub-documents can be assigned to other people, and then copied into the same location, for distribution of workload. As long as the files remain in place, the Master/Sub relationship will work.
  - You can even insert existing documents into your Master by using the Insert Subdocument button (at left). That will place the contents of the inserted file into the master document.



## Generating Reference Documents

Reference documents (indexes, tables of contents) can be generated automatically by Word...IF you have properly denoted which words/items should be included in them. We will discuss the ways in which to create these documents below.

### Tables of Contents

Creating a Table of Contents involves applying styles to the titles and/or headings you would like to have appear. This can be done in a number of ways:

- Using built-in headings
- Using outline levels
- Using custom styles
- Using embedded headings

#### Using Built-in Headings

- 1 Apply the heading styles (Heading 1 through Heading 9) to the headings in your document.
- 2 Place your insertion point where you would like the Table of Contents to appear.
- 3 Click Insert/Index and Tables/Table of Contents
- 4 Choose a format, and click OK.

#### Using Outline Levels

- 1 Apply styles that contain outline levels (1 through 9) to the headings in your document.

Follow steps 2 through 4 above to insert the Table of Contents.

### Using Custom Styles

Any style you define can be used as a Table of Contents entry, as well.

- 1 Click Insert/Index and Tables/Table of Contents
  - 2 Click Options
  - 3 Choose your style from Available Styles
  - 4 Enter a number from 1 to 9 in the TOC Level box
  - 5 Repeat for each style desired
- Click OK

### Using Embedded Headings

Embedded headings are the first few words in a paragraph that can be used in the Table of Contents.

- 1 Have each embedded heading be a separate paragraph by hitting return after it.
- 2 Apply Built-in Heading styles to the text
- 3 Show all characters, and highlight the Paragraph Mark after each heading
- 4 Select Format/Font, click the Font tab, and check Hidden. Click OK
- 5 Follow above steps 2 through 4 for creating Table of Contents.

If changes are made with styles and/or headings in the document, you will need to update the table of contents manually, by clicking within it and pressing F9 (the function key). This will update the T of C to include your changes.

## Indexes

Creating an index involves marking entries for inclusion. You can do it manually, or there are a couple ways to “automate” the process. We’ll discuss both.

### Marking Text

You must use a field code to identify which text items should be used, as well as whether it should be an entry itself, or a sub-entry under some other category (Menu...File).

- 1 Select the text you want to use as an index entry.
- 2 To enter your own text as an index entry, click where you want to insert the index entry.
- 3 Press ALT+SHIFT+X.
- 4 To create a main index entry, type or edit the text in the Main entry box.
- 5 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.
- 6 To mark the index entry, click Mark.
- 7 To mark all occurrences of this text in the document, click Mark All.

\*\*NOTE: Using Mark All will mark the first occurrence of each word in each paragraph, and it IS case-sensitive.

### Using a Concordance File

A concordance file is a table containing a list of words to be marked, and the index entries they will appear under. To create the file:

- 1 Create a new file.

- 2 Create a two-column table.
- 3 In the first column, enter the text you want Word to search for and mark as an index entry. Make sure to enter the text exactly as it appears in the document. It is case sensitive. Press TAB.
- 4 In the second column, type the index entry for the text in the first column (If you want to create a subentry, type the main entry followed by a colon and the subentry: e.g., File:Copy). Then press TAB.
- 5 Repeat steps 3 and 4 for each index reference and entry.
- 6 Save the concordance file.

### Using the file

- 1 Open the document you want to index.
- 2 On the Insert menu, click Index and Tables, and then click the Index tab.
- 3 Click AutoMark.
- 4 In the File name box, browse to the name of the concordance file you want to use.
- 5 Click Open.

*Note:* Word searches the document for each exact occurrence of text in the first column of the concordance file and then uses the text in the second column as the index entry. Word marks only the first occurrence of an entry in each paragraph.

**Tip** You can also automatically mark all occurrences of individual words or phrases by clicking Mark All in the Mark Index Entry dialog box. However, when you use a concordance file, Word automatically marks multiple words and phrases.

You can create a cross-reference for an index entry, such as “See Format” or “See also Save As.”

- 1 Highlight the text you want to use as an index entry.
- 2 Press ALT+SHIFT+X.
- 3 Under Options, click Cross-reference, and then enter the text you want to use as a cross-reference for the index entry.
- 4 Click Mark.

### Using bookmarks

Bookmarks can be used to ease navigation in a document, to mark a section of text for inclusion in an index, and more.

- To insert a bookmark, highlight the text or place the insertion point where you would like the bookmark to be. Click Insert/Bookmark, and type the name you would like to call it.
- Assigning a bookmark to a section of text will allow you to refer to it as one single index entry.
- A bookmark will be converted to an anchor when a file is saved as HTML.