

Section 3 Outlining / Master documents

By the end of this section you will be able to:

- View a document outline
- Outline a document using styles
- Promote and demote outline levels
- Expand and collapse outline levels
- Move and copy outline levels
- Use outline numbering
- Apply preset numbering to headings in a document
- Customise the numbering style for headings
- Remove heading numbering
- Use Master document view
- Create a new Master document
- Convert an existing document into a Master
- Insert sub-documents into a Master document
- Split, merge and remove subdocuments
- Allow multiple-user access to a Master document
- Format Master documents.
- Print Master documents

Document outlines

What Is A Document Outline?

An outlined document is one with a structure of headings, at various levels, with associated text. E.G. the chapter of this manual could be presented in outline.

When To Use Outlining

Outlining is most useful on larger documents or ones with a definable structure. An outlined document is easy to reorganise and restructure.

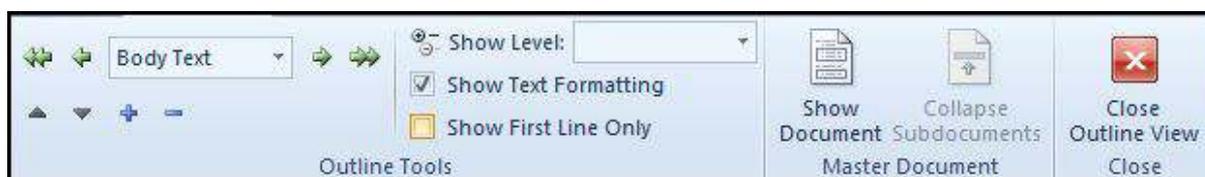
Word also provides standard styles for the levels of an outline, which can be redefined for ease and speed of formatting.

Tables of contents can be readily generated from outlines and the levels of the outline numbered in various ways.

Outlining A Document

Word provides a special view and nine heading level styles to create outlines. Outline view contains an outline bar to help quickly perform outlining tasks such as changing and displaying various heading levels.

Existing documents can be outlined or a document outline can be created in a new document.



► To create an outline in a new document:

Mouse

1. Create a new document using your preferred method.
2. Choose **OUTLINE** view from the **STATUS BAR VIEW** buttons

OR

1. Go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group.
2. Type a heading. Word automatically formats the text as heading level 1.
3. Press **ENTER** and then type the text for the next heading or body text paragraph. The new entry will have the same level as the previous entry.
4. To change the heading level, do one of the following:

To create a	Click	Press
Lower-level heading - Demote		ALT SHIFT →
Higher-level heading - Promote		ALT SHIFT ←
Paragraph of body text from a heading	 	ALT SHIFT 5 On the numeric keypad

- Repeat steps 4 and 5 for each heading and body text paragraph in the outline.

Outlining An Existing Document

Outline an existing document to view its organisation or quickly change its structure.

► To outline an existing document:

Mouse

- If the document is not in outline view, choose go to the **VIEW** ribbon and select **OUTLINE** from the **DOCUMENT VIEWS** Group. The text of the document is initially paragraphs of body text.
- Select a paragraph to change into an outline heading.
- Change the heading level (see table previous).
- Repeat steps 2 and 3 for each heading.

I joined MITAS because
I wanted **real responsibility**

The Graduate Programme
for Engineers and Geoscientists
www.discovermitas.com

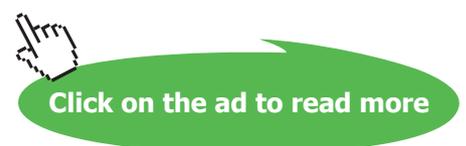


Real work
International opportunities
Three work placements



Month 16
I was a construction supervisor in the North Sea advising and helping foremen solve problems





Or

1. Select a paragraph to change into an outline heading.

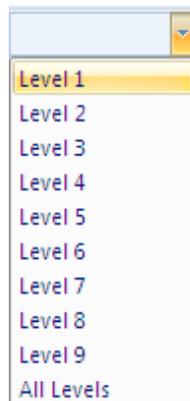


2. Use the drop down box available between the **PROMOTE/DEMOTE** arrows to apply a specific level of heading to paragraph.

In all other views view, apply heading level styles like any other style.

Using An Outline

► To show heading levels:

Mouse

1. On the **OUTLINE** ribbon Use the drop down arrow on the **SHOW LEVEL** box and click **SHOW ALL LEVELS** or press **ALT SHIFT A** to show all heading levels and text.

Showing Text

Text can be expanded or collapsed below a certain level.

► To expand or collapse text:

Mouse



1. Position the insertion point in a paragraph and click the plus button on the Outline ribbon to expand text below the heading or the minus button to collapse text below the heading.

Moving Headings And Body Text In An Outline

Moving headings in an outline can quickly restructure a document. When a heading is moved, all subheadings and body text under that heading move with it, if the subheadings and body text are collapsed under the heading.

► To move headings:

Mouse



1. Drag the heading symbol, or body text symbol, at the left of the heading, or text, up or down to the new position or click the **MOVE UP** or **MOVE DOWN** buttons on the **OUTLINE** ribbon. Word moves all subtext with the heading.

Or

Keyboard

1. Position the insertion point in the heading.
2. To prepare the heading to be moved, collapse the heading (see above).
3. To move the heading above the preceding paragraph, press **ALT SHIFT ↑**.
4. To move the heading below the following paragraph, press **ALT SHIFT ↓**.

Heading style numbering

Outline Numbering

Outline numbering allows you to create multi-level lists. You can either apply a list format to normal text or use special outlining for text that has styles attached to it. The example below shows what can be achieved with outline numbering.

- 1) Word '2002 advanced course topics include:
 - a) Advanced table features
 - 1) Drawing a table
 - 2) Adjusting column widths and row heights
 - 3) Formulae in tables
 - d) Sections
 - 1) Why use sections?
 - 2) Dividing a document into sections
 - c) Styles



The advertisement features a man in a green jacket looking out over a city street at night. The background is a blurred cityscape with tall buildings and streetlights.

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#1 EUROPEAN BUSINESS SCHOOL
FINANCIAL TIMES 2013

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MASTER IN MANAGEMENT

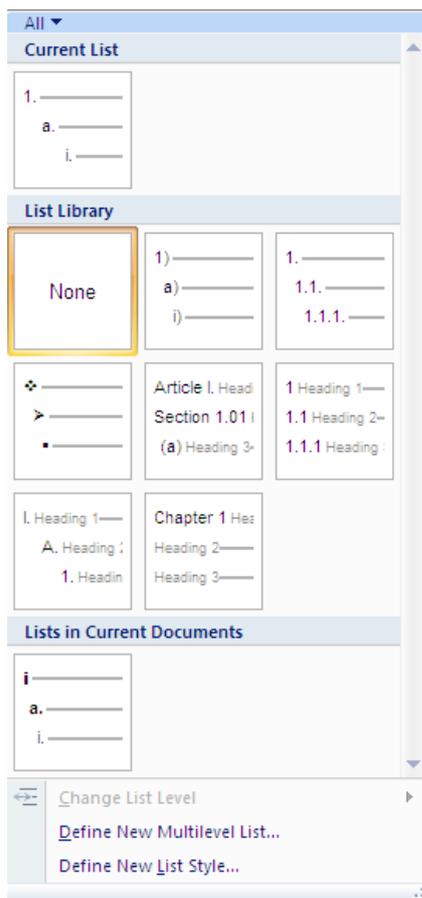
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Applying A Multi-Level List



You can apply lists using Word’s automatic numbering tools that have many different list levels. This is useful if the list you are creating has sub-points which need to line up properly. Word will initially use the top level style for all list items. Use the keyboard to demote and promote items to the required levels.

► To apply a multi-level list:

Mouse

1. Type the list one line under the other.
2. If you want blank lines of space between list items select the lines and use the **SPACE AFTER** setting in the **PARAGRAPH** dialog.
3. Use the drop down arrow to the right of the **MULTI-LEVEL NUMBERING** button to see a selection of multi-level numbering styles after making a selection click to apply style to highlighted list.



► To promote an item:

Mouse



1. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the indent button in the paragraph group or press the **TAB** key.

Or



1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

To demote an item:

Mouse



1. Position the cursor somewhere in the paragraph, or if you want to demote several paragraphs, select them and click the outdent button or hold down the **SHIFT** and **TAB** key.

Or



1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom choose **CHANGE LIST LEVEL** and select a new level for your list.

If you use the standard Heading Styles in a document, you can then apply preset or customised numbering to all the Heading Level paragraphs. Numbering can be applied in any of Word's standard views (Draft, Print layout or Outline).

Before you apply Heading Numbering, it may be advisable to apply the Heading Level Styles to the appropriate paragraphs. If you subsequently change a paragraph from one Heading style to another, E.G. from heading 1 to heading 2, the numbering will automatically update.

To Define A New Multi Level List

If none of the multi level lists suit your purposes it is possible to define one of your own with many options all in one place to set the indents and number styles required for your document

Level

The **LEVEL** field on the left of the dialog determines which Heading level Numbering you are modifying. To select a different level, either scroll up or down or click on the required level. Initially, Word always defaults to Level 1.

Number Style

The **NUMBER STYLE:** field controls the style of numbering, whether it is Arabic, Roman numerals, words or bullets. These styles are selected from the drop-down list. You can also specify what text (if any) should appear immediately before and after the number by adding it in the **NUMBER FORMAT** field, and you can change the Font of the number. If you don't want any numbering on a specific level, choose None from the **NUMBER STYLE:** drop-down.

The **START AT:** field enables you to specify if the numbering should start at something other than one.

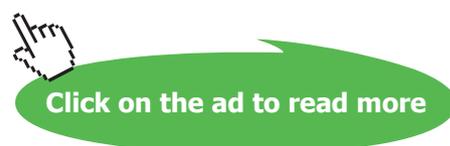
Previous Level Number

If you are creating a Legal or similar style, you can choose to make Levels 2-9 include the numbering of the previous level. E.G. if Level 1 style is 1, you can make Level 2 appear as 1.1. This option is not available for Level 1, as Level 1 has no previous level.

"I studied English for 16 years but...
...I finally learned to speak it in just six lessons"
Jane, Chinese architect

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Number Position

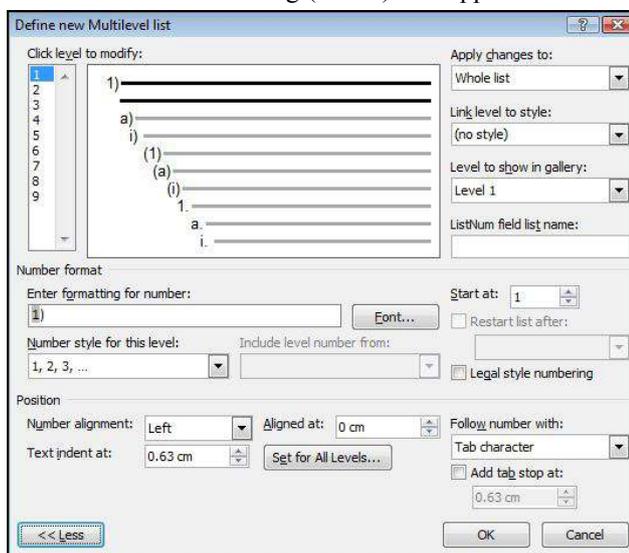
In this section, you can choose the alignment of the numbered text and where you want the numbers aligned. The Text position can be used to specify a precise measurement between the number and the text.

► To define new list

Mouse

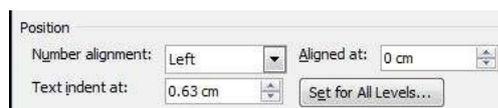


1. Use the drop down arrow to the right of the multi-level numbering button and near the bottom; choose **DEFINE NEW MULTI-LEVEL LIST** a dialog (below) will appear.



2. Select a level to modify (1-9)
3. Click the drop-down list arrow to the right of the **NUMBER STYLE** box. Word offers a variety of different numbering styles for lists, standard Arabic numbers, Roman numerals and so on.
4. Click on the required style from the displayed list.
5. Click on the **FONT** button. The **FONT** dialog opens allowing you to select font options for the selected number style.
6. Add other characters to the **ENTER FORMATTING FOR NUMBER** text box to enhance your number style. Use this option to add extra digits to numbers (e.g. if you want extra decimal places) or to add prefix and suffix characters (e.g. the word “Item”, -dash etc.).

Position



1. Use the **NUMBER ALIGNMENT** drop down box to allow a change in alignment of the numbers to left, right or centre.
2. Either enter a number or use the spin buttons to set the indent for the number or character for this level.
3. Either enter a number or use the spin buttons to set the indent for the text you will type at this level (where you want your text to start).
4. If you want the same set of indents for all levels then click the **SET FOR ALL LEVELS** button the indents chosen will be applied for all levels within your list.
5. You may now work through the levels selecting the alignment , number style and formatting for as many levels as you would use. Click **OK** to complete and create your new multi level list

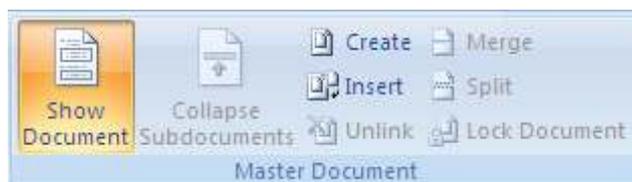
Remove Heading Numbers

► To remove Heading Numbers from the whole document:

Mouse

1. Select the heading style you wish to remove the numbers from
2. Select the highlighted numbering button on the home ribbon and select none from the options displayed.

Master documents



A master document helps you organise and maintain a long document by dividing it into several subdocuments. With a master document, you can work either with the entire long document or with any individual subdocument. You can create a table of contents and an index in the master document, which refers to all the subdocuments, and you can build cross-references between two documents.

You can work with a master document either in Master Document View or Draft View. If you want to work on the entire master document as if it were a single document, work in Draft View. Master Document View, however, is used to create, insert, open and reorganise subdocuments in the long document.

► To change to Master Document view:

Mouse



1. Select **OUTLINE** from the **VIEW** ribbon. Click on the **SHOW DOCUMENT** icon to reveal the buttons below.

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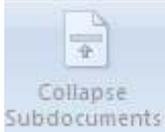
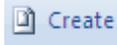
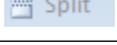
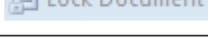
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A brief description of each of the tools is listed below:

 Collapse Subdocuments	Collapse Subdocuments
 Create	Create a Subdocument
 Unlink	Remove a Subdocument
 Insert	Insert a Subdocument
 Merge	Merge two Subdocuments
 Split	Split a Subdocument
 Lock Document	Lock or Unlock the selected document

It is important to note that the total size of a master document and all of its subdocuments cannot exceed 32MB, excluding graphics. Also, a master document cannot contain more than 8 subdocuments.

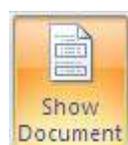
Setting Up A Master Document

There are three ways to set up a master document:

1. You can create **A NEW MASTER DOCUMENT** from scratch;
- 2) **CONVERT AN EXISTING DOCUMENT** into a master document;
- 3) **COMBINE EXISTING DOCUMENTS** to create a new master document. Whichever method you use, you need to be working in Master Document view.

1 -Creating A New Master Document

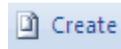
Use this procedure for creating a new master document from scratch



► To create a new master document:

Mouse

1. Open a **NEW** document and switch to **OUTLINE** view
2. Click on **SHOW DOCUMENT** for the document
3. Create subdocuments from the outline by clicking on the **CREATE** button.



4. Move within the main document to create other subdocuments.
5. Save the master document as you would with any other document. All of the subdocuments will be saved in the same location as the master with default names. (First letter of master and subdocument number)

Creating A Master Document Outline

The outline is simply a list of the topics that your overall document is going to discuss.

When you create the outline for the Long Document, you must use the standard Heading styles (Heading 1-9). It is a good idea to leave a couple of blank lines at the start of the outline, since this will leave space for a table of contents, and an overall document title.

Create the Subdocuments from the Outline

Each outlined topic together with its subtopics can be divided into a subdocument.

► To create subdocuments using the master document outline:

Mouse

1. Select the headings and text that you want to divide into a subdocument.
2. Click on the **CREATE** Subdocument button.



Outline view



3. Word then encloses each subdocument in a box, displaying a Subdocument icon in the upper-left corner of each box. The subdocuments are also separated with section breaks - the breaks can be seen in **DRAFT** view.

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Draft view



Saving The Master Document

To save the master document and all of the subdocuments, save the Master Document as you would any other document. When you assign a filename and click on **OK**, Word automatically creates filenames for all the subdocuments. It uses the first character of the heading that begins each subdocument. E.G. if you have a subdocument that begins with “Chapter 1”, the resulting filename will be “CHAPTER1.DOC”.

If a subdocument filename is going to conflict with an existing file, then Word uses part of the heading text and appends a number for the filename, E.G. “CHAP1234.DOC”.

2 -Convert An Existing Document Into A Master Document

It may be advantageous in some situations to convert existing files to be used as master and sub documents.

► **To change a document into a master:**

Mouse

1. In your existing document, switch to **OUTLINE** view and click on **SHOW DOCUMENT** to access the the commands.
2. Use **OUTLINE** view to **PROMOTE** and **DEMOTE** the heading styles as necessary
3. Then highlight the necessary text and create the subdocuments from the outline and save the master document. These two processes are covered in the previous section, “Creating a New Master Document”.

3 -Combining Documents Into A Master Document

You may already have several documents which you want to combine together to make a master document.

► To incorporate documents into a master:

Mouse

1. Open a new or existing document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Add some space at the start of the document (press **ENTER** a couple of times) if you wish to leave room for other items.
3. Position the insertion point where you want to insert the first document
4. Click on the **INSERT SUBDOCUMENT** button and select the file from the **INSERT** Subdocument dialog.



5. Repeat these last two steps for all the subdocuments. When you save the Master Document, all the subdocuments retain their original filenames and locations
Avoid inserting a subdocument at the top of the Master Document. Try to leave a few blank lines, as this will make it easier to include a table of contents and a title page.

Opening A Subdocument

You can either open a subdocument from within the master document or as a completely separate file in the normal way.

► To use the master to open a Subdocument:

Mouse

1. Open the **MASTER** document and switch to **OUTLINE** view
2. Double-click on the subdocument icon belonging to the subdocument you want opened
An advantage to opening a file this way, is that you don't have to remember what the file is called or where it is saved.

Renaming A Subdocument

If you want to rename a subdocument or save it in a different location, you must open the subdocument from within the master.

► To rename a subdocument:

Mouse

1. Open the master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Double-click on the subdocument icon to open the subdocument you want renamed
3. Use the **FILE TAB, SAVE AS, WORD DOCUMENT** button to open the **SAVE AS** dialog to rename and relocate the subdocument.
4. Close the subdocument, then **SAVE** and **CLOSE** the master document

Do not use File-Manager to rename or move subdocuments, if you do, it breaks the link between the master document and the subdocument.

Splitting A Subdocument

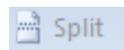
You can split a subdocument if it becomes too large, this would also allow multiple authors to work on parts of the subdocument.

Conversely, you can merge subdocuments if you want to combine small files.

► To split a subdocument in two:

Mouse

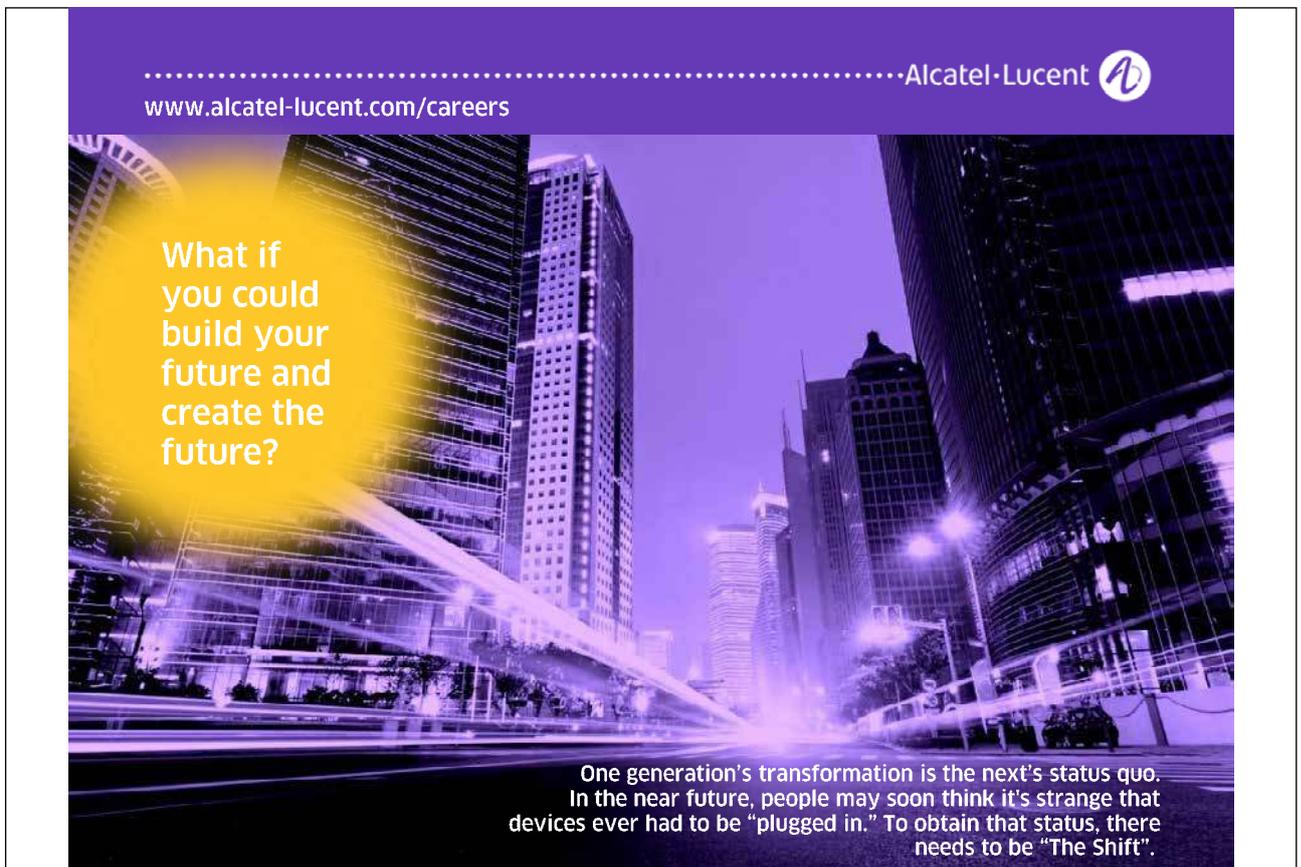
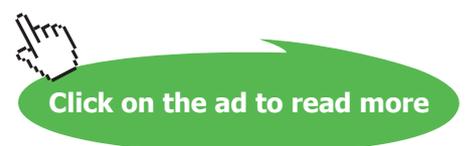
1. Position the **INSERTION POINT** in front of the heading where you want the second subdocument to begin
2. Click on the **SPLIT** button.



Merging Subdocuments

► To merge two subdocuments into one:

Mouse

An advertisement for Alcatel-Lucent. The top part has a purple header with the text "www.alcatel-lucent.com/careers" and the Alcatel-Lucent logo. Below the header is a photograph of a modern city street at night with tall buildings and light trails. Overlaid on the left side of the photo is a yellow circular graphic containing the text "What if you could build your future and create the future?". At the bottom right of the photo, there is a quote: "One generation's transformation is the next's status quo. In the near future, people may soon think it's strange that devices ever had to be 'plugged in.' To obtain that status, there needs to be 'The Shift'."

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Move the subdocuments next to one another. (If they are not already, using the outlining tools mentioned previously)
3. Click on the subdocument icon of the first subdocument
4. Hold down **SHIFT** and click on the second subdocument's icon
5. Click on the **MERGE** button.



Removing A Subdocument

► To convert a subdocument into part of the master document:

Mouse

1. Switch to **OUTLINE** view
2. Click on the subdocument icon belonging to the subdocument you want to convert
3. Click on the **UNLINK** Subdocument button.



► To completely remove a subdocument from the master document:

Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Click on the subdocument icon belonging to the subdocument you want to remove
3. Press **DELETE**

This action deletes the subdocument from the main document but the subdocument would still exist on the drive and directory where it is stored with the same filename it had before.

Sharing A Master Document

One of the great advantages of using master and subdocument documents is that more than one person can be working on them at the same time. When you open a master document, you will be able to edit any of the subdocuments that belong to you - these would be the ones that you created. However, if someone else created one of the subdocuments you can only open it as read-only, unless you unlock it.

Word determines which document belongs to which person by looking at the name of the Author in the Properties.

A subdocument for which you are not the author will have a small padlock displayed under the subdocument icon. This means that the subdocument is locked for editing you can only open it as read-only.

Unlocking A Subdocument

► To unlock the subdocument so that you can make changes:

Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Click somewhere in the subdocument
3. Click on the **LOCK/UNLOCK** Document button. The padlock symbol should then disappear allowing you to work on the subdocument.



Multi-User Access

More than one person can work on the same master document at the same time, however they cannot work on the same subdocument.

If you want to work on a subdocument, and let one of your colleagues work on one of the other subdocuments, you should do the following:

So that you can work on a subdocument while someone else accesses the master document do the following. (this is assuming that all path names are not known to you. Otherwise it is a simple matter of closing the document someone else wishes to access.)

► To allow others access to the master document:

Mouse

1. Open master document and switch to **OUTLINE** view, click on the **SHOW DOCUMENT** button.
2. Open the required subdocument (unlocking if necessary)
3. Using the **VIEW** ribbon, **SWITCH WINDOWS** command, switch to the master document.
4. Close the master document so that your colleague can open it
5. Your colleague can then follow the same process. He or she should also close the master document after opening the relevant subdocument so that you or another colleague can open it. Any changes made to the subdocuments will update in the master document.

Formatting A Master Document

You can format a master document just as you would any other Word document. Any formatting you apply when working in the master document will where relevant carry through to the subdocuments. E.G. if you redefine the formatting of one of the heading styles, the change will automatically carry through to the whole master document and its subdocuments. However, because subdocuments are placed in separate sections of the master document some changes you make may not be carried through to the whole document. E.G. if you make one of the subdocuments landscape, this will only affect the subdocument unless you specify in the Page Set-up dialog that it should affect the whole document.

Styles

The style definitions in the master document override the style definitions in a subdocument. If you insert a subdocument with different style formatting, it will automatically adopt the master document's styles. However when you open the subdocument, it will still retain the old formatting.

Headers And Footers

The Headers and Footers can be different in each subdocument, since they are in separate sections within the master document. If you want consistency throughout the master document, you should modify each of the subdocuments headers and footers to look the same. (**LINK TO PREVIOUS** option on **DESIGN** ribbon when headers & footers are being edited: see sections) If you don't set headers and footers for any of the subdocuments, the master document's header and footer will automatically appear on every page.

Tables Of Contents And Indexes

You do not need to create subdocuments for a table of contents or an index in a master document, simply insert the table of contents as part of the master document before the first subdocument. Similarly insert the index typically after the last subdocument.

Cross-References

If you want to create a cross-reference between two subdocuments, make sure you have the master document open and are working in draft view.

Printing The Master Document

To print the entire master document print in the usual way.

Printing A Subdocument

To print one of the subdocuments, you can open it and print it as normal. If a subdocument contains cross-references to another subdocument, you must print the master document so that the cross-references are updated properly.