Mastering Large Documents in Microsoft Word

This document provides instructions for using tools that make managing large documents easier, including working with subdocuments and master documents, creating a Table of Contents, adding an index, inserting captions for images, and adding footnotes and endnotes.

Working with Master Documents and Subdocuments

Using master documents and subdocuments can greatly aid in the management of large documents. Subdocuments (for example, chapters in a book) can be created by multiple authors and can be easily inserted in the master document. Subdocuments can quickly be rearranged, and they can be hidden so that navigating the master document is easier.

To insert a subdocument,

1. In the master document, switch to Outline view.
   a. From the View tab, click Outline.
   b. Or, click the Outline button in the status bar.
2. On the Outlining tab, make sure that Show Document is activated.
3. Place the cursor where you would like to insert the subdocument.
4. On the Outlining tab, click the Insert button.
5. **Browse for the document, then click Open.**

Once subdocuments have been inserted, they can be collapsed for easier navigation.

1. **On the Outlining tab, click Collapse Subdocuments.**

   ![Collapse Subdocuments](image1)

   The master document now displays the hyperlinked, full path to each subdocument.

2. **Click Expand Subdocuments to show the subdocument content.**

   ![Expand Subdocuments](image2)

   Updates can be made to subdocuments either directly in the master document or by opening the subdocument separately. Saving the changes updates both the master document and the subdocument.
Subdocuments can be easily moved by using the **Move Up** and **Move Down** buttons on the Outlining tab.

![Outlining Tab in Microsoft Word](image)

Inserting a Table of Contents

Word comes with a built-in tool for creating a table of contents. The simplest way to create a table of contents is to apply heading styles (for example, Heading 1, Heading 2, Heading 3, etc) to the entries you want included. Word then searches for headings that match the style that you chose, formats and indents the entry text according to the heading style, and then inserts the table of contents into the document.

To mark entries by using built-in heading styles,

1. Select the heading to which you want to apply a heading style.
2. On the **Home** tab, in the **Styles** group, click the style that you want.
3. Repeat these steps for each entry you want included in the table of contents.

To create a Table of Contents,

1. Click where you want to insert the table of contents, usually at the beginning of a document.
2. On the **References** tab, in the **Table of Contents** group, click **Table of Contents**, and then click the table of contents style that you want.
3. Please note that if you want to specify more options — for example, how many heading levels to show — click **Insert Table of Contents** to open the Table of Contents dialog box.

The table of contents can be easily updated as changes are made in your document.

1. On the **References** tab, in the **Table of Contents** group, click **Update Table**.

2. Click **Update page numbers only** or **Update entire table**.

To delete a table of contents,

1. On the **References** tab, in the **Table of Contents** group, click **Table of Contents**.
2. Click **Remove Table of Contents**.
Creating an Index

An index lists the terms and topics that are discussed in a document, along with the pages on which they appear.

To create an index,

1. To use existing text as an index entry, select the text. To enter your own text as an index entry, click where you want to insert the index entry.
2. On the References tab, in the Index group, click Mark Entry.
3. The selected text will appear in the Main entry box. To use your own text for the Main entry, type or edit the text in the Main entry box.

   a. You can customize the entry by creating a subentry. 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 then type the text of the third-level entry.
   b. To create a cross-reference to another entry, click Cross-reference under Options, and then type the text for the other entry in the box.
   c. To format the page numbers that will appear in the index, select the Bold check box or the Italic check box below Page number format.
   d. To format the text for the index, select the text in the Main entry or Subentry box, right-click, and then click Font. Select the desired formatting options.
4. To mark the index entry, click Mark. To mark all occurrences of this text in the document, click Mark All. When text is marked as an index entry, Word adds a specialXE (Index Entry) field that includes the marked main entry and any cross-reference information that you choose to include.
After you mark the entries, you are ready to select an index design and insert the index into your document.

1. Click where you want to add the index.
2. On the References tab, in the Index group, click Insert Index.
3. Select the desired index options, then click OK.

To update the index,

1. Click the index, and then press F9.
2. Or click Update Index in the Index group on the References tab.

To delete an index entry,

1. Select the entire index entry field, including the braces ({}), and then press Delete.
2. If you do not see the XE fields, click Show/Hide in the Paragraph group on the Home tab.
Using Captions with Images

A caption is a numbered label, such as Figure 1, that you can add to a figure, a table, an equation, or another object.

To add a caption,

1. Select the object (table, equation, figure, or another object) to which you want to add a caption.
2. On the References tab, in the Captions group, click Insert Caption.
3. In the Label list, select the label that best describes the object, such as a picture or equation. Click New Label to enter a custom label.
4. Note that if you want to be able to wrap text around the object and caption, or you want to be able to move the object and the caption together, you need to insert both the object and the caption into a text box.

To delete a caption,

1. Select the caption you want to delete.
2. Press Delete.

Word automatically updates the caption numbers when new captions are inserted. However, if you delete or move a caption, you must manually update the captions. To update a caption,

1. Select the caption. To select all captions, click anywhere in the document and press CTRL+A (this selects the entire document).
2. Right-click, then click **Update Field**.

3. Or press **F9**.

If the many images in your document hampers your ability to scroll quickly, Word’s Picture Placeholder feature may help. When turned on, Picture Placeholder displays only an empty box where the picture belongs. As such, your system does not have to use the memory and time to load up the pictures, so the scrolling speed will increase.

Rest assured, when you use the Print Preview feature, you will see the pictures. When you print your document, you will see the pictures. But, when you edit your document, you will only see an empty frame where your picture will be.

To turn on Picture Placeholders,

1. Click the **Microsoft Office button**.
2. Click **Word Options**.
3. Go to **Advanced** options.
4. Check **Show picture placeholders**, and click **OK**.
5. You will now see empty frames where pictures are placed.

Adding Footnotes and Endnotes

Footnotes and endnotes are used to explain, comment on, or provide references for text in a document. For example, footnotes might be used for detailed comments and endnotes for citation of sources.

By default, Word places footnotes at the end of each page and endnotes at the end of the document.

Footnotes and endnotes consist of two linked parts — the note reference mark and the corresponding note text.

Word automatically numbers footnotes and endnotes for you. When you add, delete, or move notes that are automatically numbered, Word renumbers the footnote and endnote reference marks.

To insert a footnote or endnote,

1. Click where you want to insert the note reference mark.
2. On the References tab, in the Footnotes group, click Insert Footnote or Insert Endnote.
3. Double-click the footnote or endnote number to return to the reference mark in the document.
4. To make changes to the format of footnotes or endnotes, click the Footnotes Dialog Box Launcher.

5. To delete a footnote or endnote, select the footnote or endnote and press Delete.