

A **master document** helps you to manage long documents that may contain many chapters or sections, or where including all content in a single document would prove unmanageable. A master document contains **links** to each **subdocument**, such as a chapter, enabling you to edit each subdocument within the master document. A master document will also control the formatting, layout, styles and so on of its subdocuments, ensuring consistency across all subdocuments.

In this session you will:

- ✓ gain an understanding of master documents
- ✓ learn how to create a master document
- ✓ learn how to create subdocuments
- ✓ learn how to work with master documents views
- ✓ learn how to insert subdocuments
- ✓ learn how to format a master document
- ✓ learn how to edit subdocuments
- ✓ learn how to restructure a master document
- ✓ learn how to merge subdocuments
- ✓ learn how to delete a subdocument
- ✓ learn how to unlink subdocuments
- ✓ gain an understanding of why master documents are misunderstood.

UNDERSTANDING MASTER DOCUMENTS

Master documents are useful when working with very long documents. Sometimes documents become so long that they become unwieldy and hard to navigate. Or, you may want to keep

sections of a document separate when working with multiple authors until you're ready to finalise the document. Master documents can help you to better manage long documents.

What is a Master Document?

Master documents enable easy navigation and greater flexibility when working with very long documents, and can simplify the process of editing, formatting and finishing very long documents.

A **master document** contains links to **subdocuments**. These subdocuments are really just separate files, which can be created within the master document, or attached to the master document.

Subdocuments can be viewed as **hyperlinks** in the master document or all subdocument text and content can be displayed within the master document. The following picture shows a list of **hyperlinks** to subdocuments in a master document in **collapsed** view.



Why Use Master Documents?

Master documents are useful for a range of tasks, including the following.

- The document is so long that working with it as a single document causes the document (and Word) to become unstable.
- To keep sections of a document separate, such as where multiple authors and reviewers are contributing to the document, until the document is ready to be finalised.
- To maintain consistent layout and formatting across all subdocuments, including styles and page layout. All formatting and layout is controlled within the master document, so any formatting changes applied to the master document are also applied to the subdocuments (unless the subdocument is **locked**).
- To structure long documents. To ensure that the document is structured correctly, such as the chapters are in the correct order or sequence, for example.

Creating, Inserting And Saving Subdocuments

Subdocuments can be **created** within the master document. You might create a subdocument when creating a new section or chapter, for example, or to enter a few lines of text, such as a comment. When you save a master document after creating subdocuments, the subdocuments will be saved automatically as separate files, with the heading text as the file name. Subdocuments are saved in the same folder as the master document.

Subdocuments can also be **inserted**, which means they are attached to the master document. Make sure you store all subdocuments in the same folder as the master document where possible or practical, to ensure that links remain updated and correct.

CREATING A MASTER DOCUMENT

In Microsoft Word, a **master document** is one that contains links to other Word documents, or **subdocuments**, enabling you to pull content together from multiple files to create one long

document. **Outline** view is initially used to **create a master document**, and the tools on the **Outlining** tab will assist you in structuring the master document.

Try This Yourself:

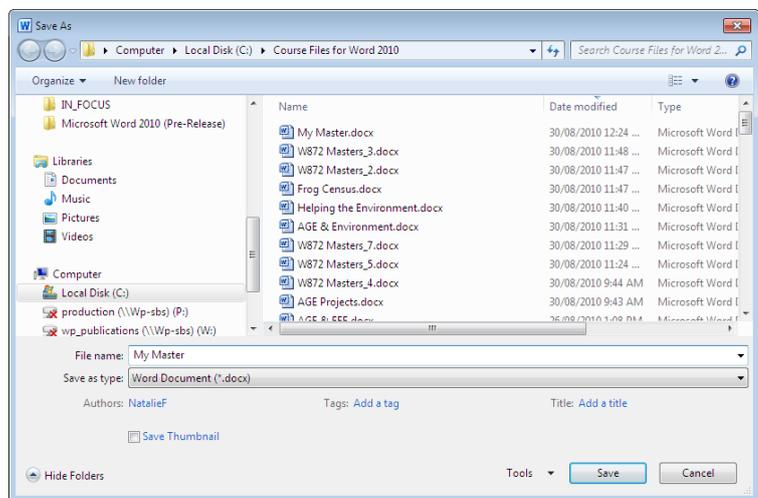
Open File

Before starting this exercise ensure you have a blank document open...

- 1 Click on the **View** tab, then click on **Outline**  in the **Document Views** group to switch to **Outline** view
- 2 Ensure that **Show Text Formatting** in the **Outline Tools** group is ticked and that **Show First Line Only** is not ticked
- 3 Type **Alpheius Global Enterprises:** then press **Shift** + **Enter**
Now to type the second part of the heading...
- 4 Type **Protecting Our Environment** then press **Enter**
You will now save the document...
- 5 Click on the **File** tab, then click on **Save As** to open the **Save As** dialog box
- 6 Type **My Master** in **File name**, then navigate to the course files folder
- 7 Click on **[Save]** to save the document

3 **Alpheius Global Enterprises:**

4 **Alpheius Global Enterprises;
Protecting Our Environment**



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For Your Reference...

To **create a master document**:

1. Click on the **View** tab, then click on **Outline**  in the **Document Views** group
2. Type any required text (such as a heading)
3. Save the document

Handy to Know...

- It is important to remember that the master document is the **control** document, where the subdocuments contain the bulk of the content. Typically, the amount of content placed into the master document itself should be limited.

CREATING SUBDOCUMENTS

The main body of text in a master document is typically stored in one or more subsidiary documents known as **subdocuments**. Links are created to these subdocuments which are

subsequently placed into special subdocument holders within the master document. When the master document is saved, each **subdocument** is saved as a separate file.

Try This Yourself:

Same File

Continue using the previous file with this exercise, or open the file *W872 Masters_1.docx...*

- 1 Ensure that **Show First Line Only** is not selected (unchecked) in the **Outline Tools** group on the **Outline** tab, then press **Ctrl** + **End** to move to the end of the document
- 2 If not already selected, click on **Show Document** in the **Master Document** group then click on **Create**
A new subdocument frame appears with a selector icon in the top left corner...
- 3 Click inside the box next to **expand**, then click on **Demote** to demote to **Level 2**
- 4 Type **Helping To Protect Our Environment** then press **Enter**
- 5 Click on **Demote To Body Text** and then type the text as shown
- 6 Press **Ctrl** + **End** to move to the end of the document
- 7 Repeat steps 2 to 5 to create another subdocument as shown
- 8 Save and close the document

2 Alpheius Global Enterprises; Protecting Our Environment

3 Alpheius Global Enterprises; Protecting Our Environment

4 Alpheius Global Enterprises; Protecting Our Environment

5 Alpheius Global Enterprises; Protecting Our Environment

6 Alpheius Global Enterprises; Protecting Our Environment

7 Alpheius Global Enterprises; Protecting Our Environment

For Your Reference...

To **create a subdocument**:

1. Position the insertion point
2. Click on **Show Documents** in the **Master Document** group then click on **Create**
3. Click in the subdocument frame and type

Handy to Know...

- When you save a master document, each subdocument created will be independently saved. The filename for the subdocument is automatically based on the first line of text e.g. if the subdocument heading is **AGE Projects** then the subdocument will be saved as **AGE Projects.docx**.

CHANGING MASTER DOCUMENTS VIEWS

A master document is simply a shell of a document, containing links to subdocuments that contain the actual document content. Using the different views and tools available in Word, you

are able to alter the way you look at and **work with a master document**. For instance, it is possible to expand or collapse the master document or view how it will look when printed and so on.

Try This Yourself:

Open File Before starting this exercise you **MUST** open the file W872 Masters_2.docx...

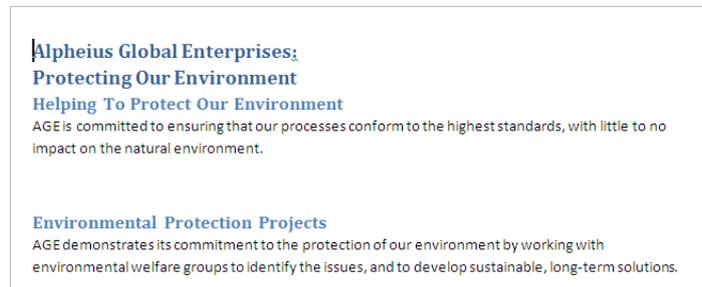
- 1 Take a moment to look at the document
When opened, a master document will display subdocuments as hyperlinks...
- 2 Ensure that **Show Document**  is selected, then click on **Expand Subdocuments**  in the **Master Document** group
The subdocument text is displayed. The Show First Line Only option is also selected by default in the Outline Tools group...
- 3 Click on **Show First Line Only** in the **Outline Tools** group to deselect (uncheck) this option
Now you can see all subdocument text...
- 4 Click on the **View** tab, then click on **Print Layout**  in the **Document Views** group
The document now appears as a single document. This is how the document would look when printed...
- 5 Click on **Outline**  in the **Document Views** group to return to **Outline** view, then click on **Show Document** 



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For Your Reference...

To **work with the master document views**:

- Click on the **View** tab, then click on:
1. **Print Layout**  to view the document as a whole, or
 2. **Draft**  to view section breaks, or
 3. **Outline**  to view the document structure

Handy to Know...

- If you click on **Expand subdocuments**  in **Outline** view, you will probably only see the first line of text – click on **Show First Line Only** in the **Outline Tools** group until the option is not ticked if you want to view all of the text.

INSERTING SUBDOCUMENTS

As well as creating *new subdocuments* within a master document, you can also *insert existing Word files as subdocuments* into a master document – in fact, this process is usually

considered the most appropriate way to develop master documents. The link created to each subdocument enables the master document to display their contents.

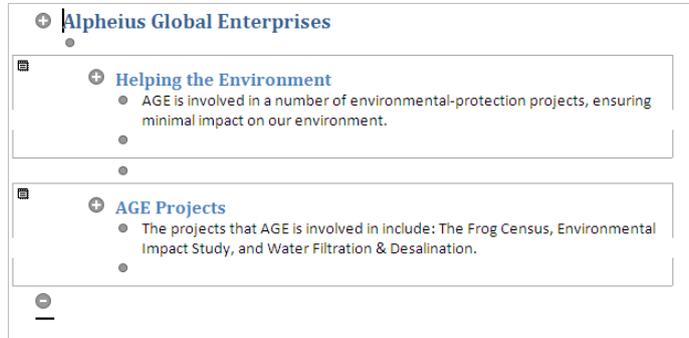
Try This Yourself:

Open
File

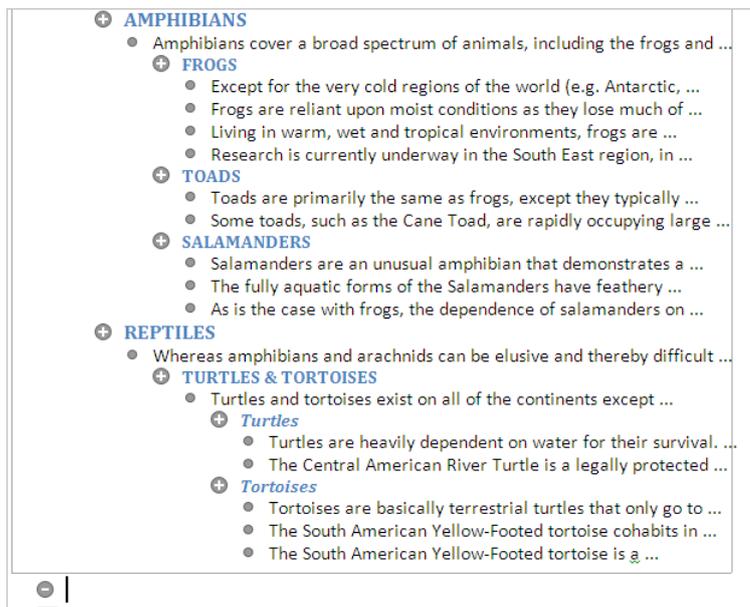
Before starting this exercise you **MUST** open the file *W872 Masters_1.docx*...

- 1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab
- 2 Press **Ctrl** + **End** to move to the end of the document then click on **Insert**  in the **Master Document** group to open the **Insert Subdocument** dialog box
- 3 Navigate to and click on **Protecting Local Fauna.docx** (this file can be found in the course files folder) then click on **[Open]**
A question box might appear, asking if you want to rename a style...
- 4 Click on **[No to All]**
The subdocument will be inserted...
- 5 Repeat steps 2 to 4 to insert the files **Frog Studies 2010.docx** and **AGE & EEE.docx**, then save the document

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For Your Reference...

To **insert a subdocument**:

1. In **Outline** view, position the insertion point
2. Click on **Insert**  in the **Master Document** group
3. Locate and click on the subdocument
4. Click on **[Open]**

Handy to Know...

- To ensure consistency in **styles**, a master document will redefine any subdocument style of the same name. If there are styles with conflicting definitions, Word will enable you to rename the subdocument style prior to inserting it into the master document.

FORMATTING A MASTER DOCUMENT

Master documents often need a bit of spit and polish before they are ready for publication. When subdocuments are inserted, the master document automatically redefines the styles that

they have in common, however you might still experience some style inconsistencies. The best time to apply **formatting to a master document** is once all of the subdocuments are in place.

Try This Yourself:

Same File Continue using the previous file with this exercise...

1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab, then press **Ctrl** + **Home** to move to the beginning of the document

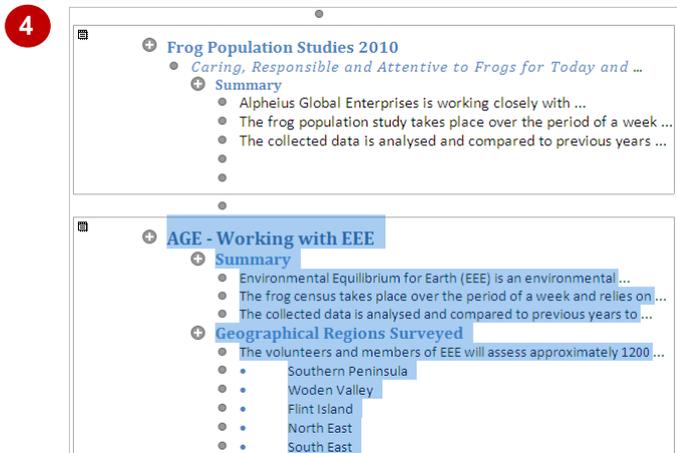
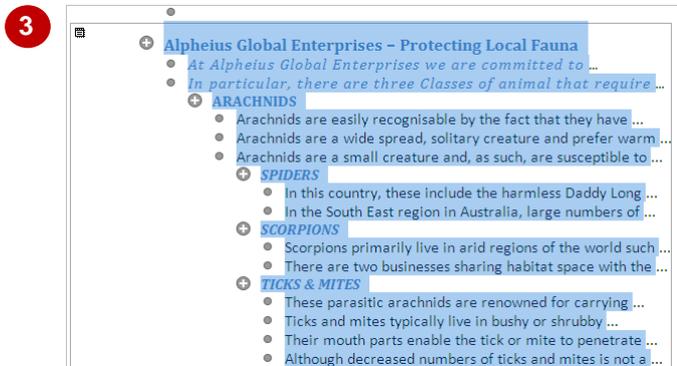
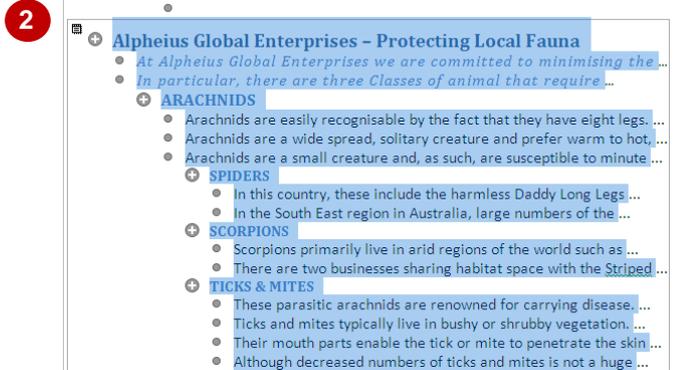
We'll apply consistent styles to the headings...

2 Click on **expand**  next to **AGE – Commitment to the Environment** to select all the text in the subdocument

3 Click on **Demote**  to demote all the headings one level
The styles will now be consistent with the first two subdocuments...

4 Repeat steps **2** and **3** to demote the remaining two subdocuments, as shown

5 Save the document
When you save a master document, the subdocuments will also be saved



For Your Reference...

To **format a master document**:

1. Click on the heading to change
2. Use the options on the **Outlining** tab to change the heading level (styles)
3. Use the **Font** options on the **Home** tab to apply other font formatting

Handy to Know...

- You can prevent formatting changes being applied to a subdocument. To do this, make sure that **Show Document**  and **Expand Subdocuments**  are selected, then click in the box of the relevant subdocument and click on **Lock Document** . Click on **Lock Document**  again to enable updates.

EDITING SUBDOCUMENTS

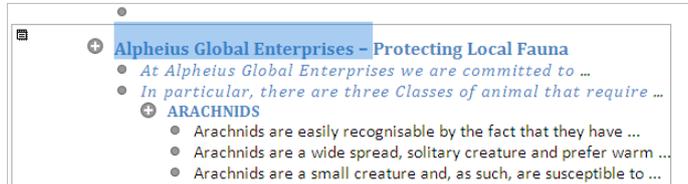
Subdocuments exist independently of a master document as separate files, and as such they can be opened and **edited** like any other document. However, when a subdocument has been

inserted into a master document, it can also be **edited** from within the master – any changes made here will be automatically saved into the subdocument when saving the master document.

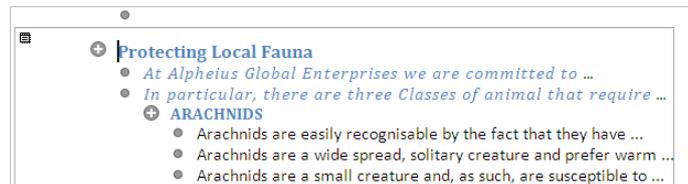
Try This Yourself:

Same File Continue using the previous file with this exercise...

- 1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab
- 2 Select the heading text, as shown
- 3 Press **Del** to delete the text
You can also open the subdocument in a separate window...
- 4 Double-click on the selector icon  for the third subdocument titled **AGE – Working with EEE** to open the subdocument in a separate window
- 5 Select the heading text as shown
- 6 Press **Del** and then save and close the subdocument
The changes will be reflected in the master document. You can also apply different styles to text...
- 7 Click in the text **Working With EEE**, click on the **Home** tab, then click on the dialog box launcher  for the **Styles** group to open the **Styles** gallery
- 8 Click on **Heading 2** to apply this style, then save the document



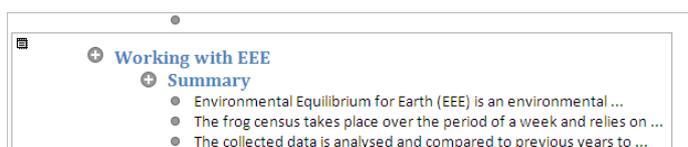
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For Your Reference...

To **edit a subdocument**:

1. Expand the subdocuments
2. Make the required editing changes as a part of the master document, OR double-click on a selector icon  and edit the subdocument in its own window
3. Save and close the subdocument

Handy to Know...

- A subdocument opened in its own window for editing will probably be faster, as Word's performance tends to suffer when working with complex master documents.

RESTRUCTURING A MASTER DOCUMENT

As more subdocuments are inserted into the master document, and as content is added, edited and removed, you may need to restructure the master document accordingly. This means

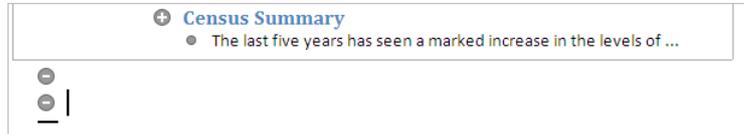
moving subdocuments so as to change the order or sequence of the subdocument links. It can help to preview the document as a whole in **Print Layout** view before restructuring your document.

Try This Yourself:

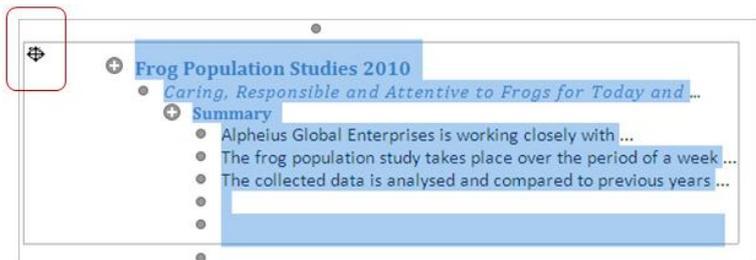
Same File

Continue using the previous file with this exercise...

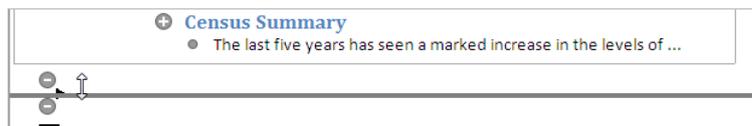
- 1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab
You will first insert a hard return where you want to move the subdocument to...
- 2 Press **Ctrl** + **End** to move to the end of the document, then press **Enter**
You will now select the subdocument to move...
- 3 Click and hold the mouse button on the **selector** icon  for the subdocument titled **Frog Population Studies**, as shown
- 4 Drag downwards and position the grey line between the two points, as shown
- 5 Release the mouse button
This is now the last subdocument...
- 6 Save the document



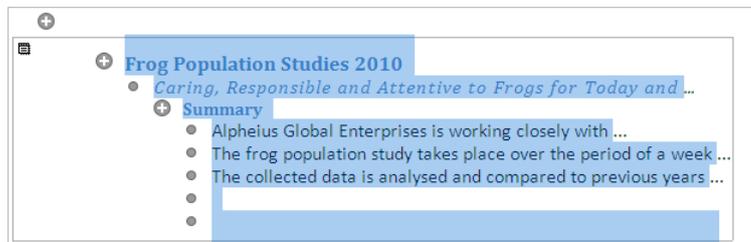
2



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For Your Reference...

To **move subdocuments**:

1. Click and hold the mouse button on the selector icon of the subdocument to move
2. Drag upwards or downwards, and release the mouse button when the grey line is in the location that you want to move it to

Handy to Know...

- To move the contents of a subdocument to another subdocument, click on **expand**  to select the subdocument text that you want to move, then drag up or down. Release the mouse button when the black line highlights its new location.

MERGING SUBDOCUMENTS

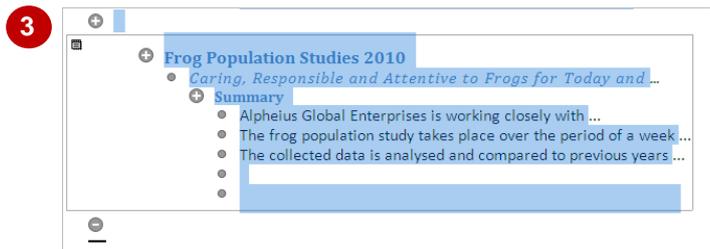
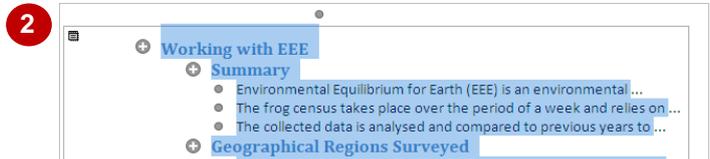
If you find that you have more subdocuments than is practical, you can **merge subdocuments**. This merges the subdocuments into a single file, where the first subdocument holds all of the

content of the merged subdocuments. Reducing the number of subdocuments keeps the master document less complicated – which means less chance that something can go awry!

Try This Yourself:

Same File Continue using the previous file with this exercise...

- 1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab
- 2 Click on the selector icon  for the fourth subdocument, titled **Working With EEE**
This will select the entire subdocument...
- 3 Hold down **Shift** and click on the selector icon  for the subdocument titled **Frog Population Studies 2010**
Subdocuments you want to merge must be adjacent to (above or below) one another...
- 4 Click on **Merge**  in the **Master Document** group
The two subdocuments will now sit within a single subdocument frame and therefore a single file. You will now have a look at the hyperlinks...
- 5 Click on **Collapse Subdocuments**  in the **Master Document** group
You will be asked to save the changes...
- 6 Click on **[OK]** then save the document



For Your Reference...

To **merge subdocuments**:

1. Press **Shift** + click on the selector icons  of each subdocument to select
2. Click on **Merge**  in the **Master Document** group

Handy to Know...

- Just as you can **merge** subdocuments, you can also **split** them. This is useful if you want to remove content from a subdocument and store in a separate file. To split a subdocument, select the text that you want to separate, then click on **Split** . The split will occur above the selected text.

DELETING SUBDOCUMENTS

Sometimes you might need to **delete a subdocument** from a master document. This process is easily achieved and merely removes the **link** to the subdocument; it does not delete

the actual file itself. The separate file still exists and will remain until you delete the actual file.

Try This Yourself:

Same File Continue using the previous file with this exercise...

- 1 Click on **Collapse Subdocuments**  in the **Master Document** group if required to display the subdocument hyperlinks
- 2 Move the mouse pointer to the left of the first hyperlink until it changes to a right-pointing arrow and then click to select the hyperlink
- 3 Press **Del** to delete the hyperlink
Now that the link to the document is removed, the subdocument will no longer appear in the master...
- 4 Click on **Expand Subdocuments**  in the **Master Document** group
- 5 Save the document



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For Your Reference...

To **delete a subdocument**:

1. Click on **Collapse Subdocuments**  in the **Master Document** group if required to display the subdocument hyperlinks
2. Select the subdocument
3. Press **Del**

Handy to Know...

- You can also delete subdocuments and blocks of text in **Expanded** view. To do this, make sure the subdocuments are expanded, then click on **expand**  next to the main heading of the subdocument to delete or block of text, then press **Del**.

UNLINKING SUBDOCUMENTS

To **unlink** a subdocument is to remove the link to the subdocument but retain the content in the master document. So, the content (such as document text) in the subdocument now exists in

a separate file, as well as in the master document itself. You might unlink subdocuments when you are finalising the master document and want to convert the subdocuments into a single document.

Try This Yourself:

Same File Continue using the previous file with this exercise...

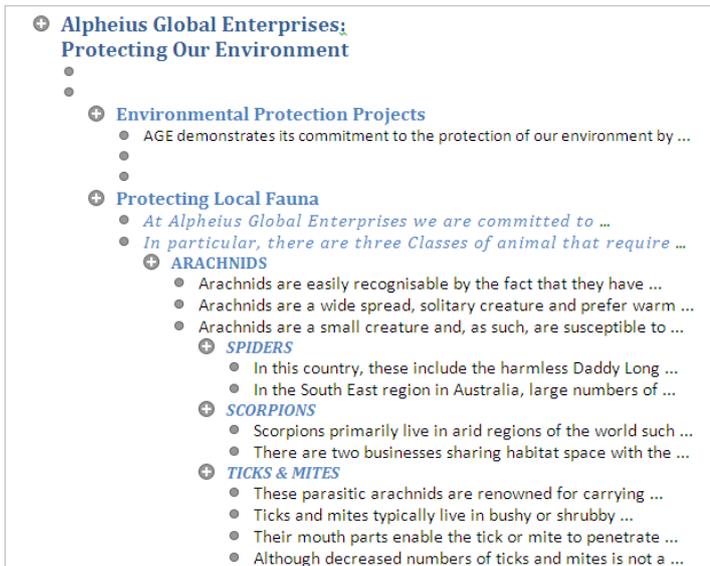
- 1 If the subdocuments are not expanded, click on **Expand Subdocuments**  in the **Master Document** group on the **Outlining** tab
- 2 Click on **expand**  next to the heading **Environmental Protection Projects** to select it
- 3 Click on **Unlink**  in the **Master Document** group
The subdocument text is no longer within a frame, but now sits in the master document itself...
- 4 Repeat steps 2 and 3 for the remaining two subdocuments
The subdocuments' content is now all contained in the master document, as well as in separate files...
- 5 Click on **Close Outline View**  in the **Close** group to view the document as a long document
- 6 Save and close the document



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For Your Reference...

To **unlink a subdocument**:

1. Click on **expand**  next to the main heading of the subdocument to unlink
2. Click on **Unlink** 

Handy to Know...

- Once you have unlinked subdocuments into the master document, you can then finalise the document, such as checking that styles are correct, inserting a title page, table of contents and an index, for example, as well as saving and printing the document.

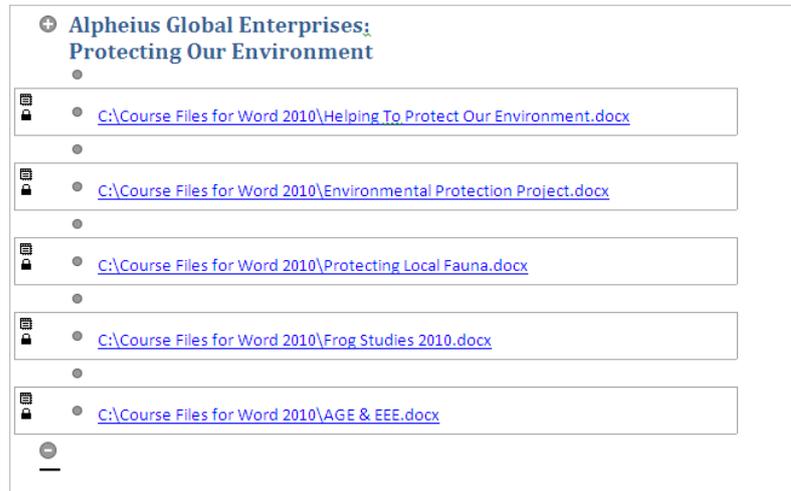
WHY MASTER DOCUMENTS ARE MISUNDERSTOOD

Master documents have, over the years, earned themselves a bad reputation, based primarily on producing somewhat unpredictable results. However, if you follow a couple of basic rules,

master documents should operate smoothly. The two main limitations with master documents involve subdocument file location and the method used to separate subdocuments.

1 Subdocument File Locations

Subdocuments can be displayed in one of two ways in a master document: either they are displayed in an **expanded** format enabling you to see the document text, or in a **collapsed** format whereby they are simply displayed as hyperlinks indicating each file's location (see picture to the right). The collapsed view is the default view when you open a master document. Make sure you keep all files in the same folder where possible. If the file's location or name is changed or the file deleted, the master document will struggle as it can no longer find the subdocument.



2 Section Breaks

When you create a subdocument in a master document, Word uses continuous section breaks at the start and the end of the subdocument to separate it from the rest of the document. However, when you insert an existing document as a subdocument, Word separates it with a next page section break at the start of the document, and a continuous section break at the end.

In effect, inserted subdocuments will begin on a new page. You can view the section breaks either by clicking on **Show Document**  in the **Master Document** group on the **Outlining** tab to turn off this option (see picture below). Or, click on **Show/Hide**  on the **Home** tab to display the paragraph marks, section breaks and other hidden symbols.

