

Word: Building long documents



The small print

Prerequisites

Time in the workshop is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos. Online videos provided through LinkedIn Learning can be accessed free of charge by University members anytime, anywhere, through a browser or app.

Your course booking will tell you if any prior learning activity is required. If you don't have an environment where you can do this learning, you can come along to one of our LinkedIn Learning sessions. These are a quiet space where you can work through videos or other workshop resources.

If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

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About the workshop designer

Pamela Stanworth has over a decade's experience working on formal documents, theses and reports with researchers and departments across the University. She brings a pragmatic approach to building documents that are effective, reliable and sustainable.

Pamela's roots are in engineering, working with blue-chip industrial companies, technical consultancy and small businesses. Her commitment in teaching and consulting is to enable people to use appropriate technology in their work, efficiently and to a high standard.

Revision history

Version	Date	Author	Comments
1.0	September 2016	Pamela Stanworth	Created
1.1	December 2018	Pamela Stanworth	Updates
2.0	May 2020	Pamela Stanworth	Revise for online
3.0	September 2022	Pamela Stanworth	New course title
3.1	October 2023	Pamela Stanworth	Reformat

About this workshop

This workshop helps you to get organised when creating large or very large documents (reports, theses, dissertations etc.).

What you will learn

We will discuss how to design your own template, and how to manage a collection of consistent, related documents. If planning to combine several separate chapter documents into a book, you need a good understanding of how word-processor templates work (and what they don't do).

We work through the key process of combining those chapters to form a single document, with well-behaved number sequences for pages, headings, figures etc. We will explore ways of working efficiently to re-structure a document and ways of sharing and collaborating.

We will include pointers to other workshops and further resources that will help you go on later to create and manage documents.

What you need to know

The ideas and techniques covered in this workshop will apply to a range of tools. We will demonstrate using *Word for Windows*, which is widely available. However, the concepts will be the same or similar, whatever word-processing software you decide to use.

I will assume that you are reasonably confident in using the tool you have chosen to use to create your documents. With your chosen tool, you will need to be able to:

- Insert, correct and format text
- Create and save documents
- Create and use styles, particularly heading styles, for formatting and structuring text
- Lay out pages using sections and section breaks
- Navigate the commands and menus, using Help as necessary

If you need to review these activities, LinkedIn Learning is a great place to get guidance. There is an activity with relevant videos in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “long documents activity”.

The resources you need

Sample documents that you can use to experiment with will be available, but you may like to bring along your own.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “long documents”.

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with *Word for Windows* installed.

You can use your own computer with your preferred app installed if you want to – just bear in mind that I am not an expert in every app (although I am sure that between us we will be able to sort out most problems!).

Learning Objectives

This workshop has the following learning objectives:

Learning Objective One – Using templates to create new documents

Learning Objective Two – Creating and using your own template

Learning Objective Three – Significance of editing a template

Learning Objective Four – Converting a document to match another template

Learning Objective Five – Assembling a set of documents into a book

Learning Objective Six – Viewing, browsing and re-structuring a document

Learning Objective Seven – Collaboration between several authors

Learning Objective One – Using templates to create new documents

A template is a pattern document, used when a new document is created – the new document exactly matches the template, although of course you can later edit any aspect. Some templates are built-in with *Word*. You will create some new documents, using templates provided, and compare their similarities and differences.

Create a “blank” new document. Try it out, with a little text, and explore the page layout and formatting.

Explore the featured templates offered. Create another new document, this time based on one of the templates provided. Enter some sample text, and compare the page layout, formatting and decorations.



Learning Objective Two – Creating and using your own template

You can create templates with the features, styles and content that you require for a particular task. You will set up a suitable document, then convert it into a template, then try it out for creating documents.

Starting with a blank new document, make some changes for use as a “certificate of attendance” template: change the page layout, type some standard text, create a new style, modify a built-in style.

Save it as a new custom template in the default templates folder. Then try it out by creating a new certificate document using the new template, for a student called Tom Archer. Notice the page setup and standard text, and try out the revised style/s. (Save the certificate document, for use in a later activity.)



Learning Objective Three – Significance of editing a template

Once a template has been set up and used to create a number of documents, what would be the impact of editing that template? You will carry out some experiments to clarify this.

Open the customised certificate template again, and make further changes to the page setup and the style definitions. Test the revised template if you wish, by creating another new certificate document.

Now open the Tom Archer certificate document that had been created earlier, based on this template before you changed it. Examine carefully whether that document has changed due to your template editing.



Learning Objective Four – Converting a document to match another template

When you create a new template, you may need to bring some existing documents into line, so that they match the new set of documents. You will convert a document to match a new template.

First, create a new template by saving **green text.docx** as a template. Use the “heart transplant” method to transplant the contents of **Balham Intro2.docx** into a new document based on this template. Remember to type a word or phrase into the new document, before you paste in the text, and remember to delete that word afterwards.

Examine the new document carefully, to see the effect on page setup and formatting of inserting this content into a new document.

Apply heading styles as necessary, to ensure that the headings conform to the definitions in the new document.



Learning Objective Five – Assembling a set of documents into a book

A book or thesis may start out as a collection of separate documents, such as one per chapter. These can be assembled into a single document, to ensure consistency of formatting and numbering throughout.

If several documents are to be combined, they **must** all have been created using on the same template using techniques such as those covered above.

Examine the set of **Thesis Chapter** documents provided, noting the numbering and other features. Open and examine the **Thesis Container** document.

At the message “Body of Thesis”, insert Chapter 1. Repeat for Chapter2 and the others. Examine the book you have built: ensure that page numbers, footnote numbers and heading numbers count correctly through the document. Update any field codes such as figure numbers.



Learning Objective Six – Viewing, browsing and re-structuring a document

With a large document, using the viewing tools can save you a lot of time in editing and moving around the document.

Compare Draft View with Print Layout View in **View Options.docx**, and notice how these views display figures, columns and page borders. See the effect of using picture placeholders.

Once a document has been structured using heading styles, some powerful tools become available to help you manage and work on the content.

In **email2.docx**, explore ways of navigating a large document by pages or by headings. Compare the navigation pane with the outline view, where the headings and sub-headings appear as a hierarchy. Experiment with showing some different levels of headings, re-ordering portions of text and promoting/demoting headings.



Learning Objective Seven – Collaboration between several authors

When several colleagues are working on the same document, editing and reviewing tasks will go more smoothly and quickly using collaboration tools appropriately.

Working on **Track Changes.docx**, turn on change tracking and then notice how your own edits, insertions and deletions are marked.

In **Comment and Combine.docx**, read some comments by another author and add some of your own comments. Explore the process of combining the document with another version of the same text (**Comment and Combine Revised.docx**), accepting/rejecting the marked changes as you go along.



Further information

Getting extra help

Course Clinics

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice. Contact us using courses@it.ox.ac.uk.

Study Videos from LinkedIn Learning

On our website, you will find our collection of self-service courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/linkedin-learning and sign in with your Single Sign-On (SSO) credentials.

Some courses recommend pre- and/or post-course activities to support your learning. You can watch the online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

Find the pre-course activity for this course in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “long documents activity”.

About the IT Learning Centre

The IT Learning Centre delivers a programme of digital skills courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through LinkedIn Learning.

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver closed courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk.

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.

The Customer Services Group also offers a data back-up service. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

Course Slides

The following pages contain images of the slides used in the presentation. The original PowerPoint presentation file can be downloaded from the same place where you obtained this course book.

Word:

Thesis and book design

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Today, the exercise files are in the **Documents** folder

Word 2019 in teaching rooms

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Course topics

Part 1

Automatic numbering

Footnotes & endnotes

Cross references

Index and table of contents

Figures and captions

Part 2

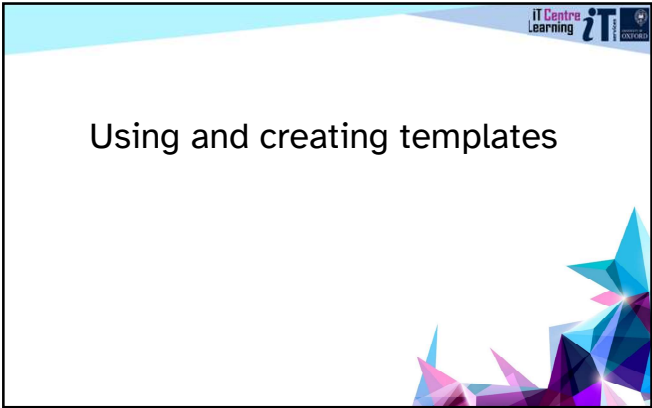
How templates work

Create or modify templates

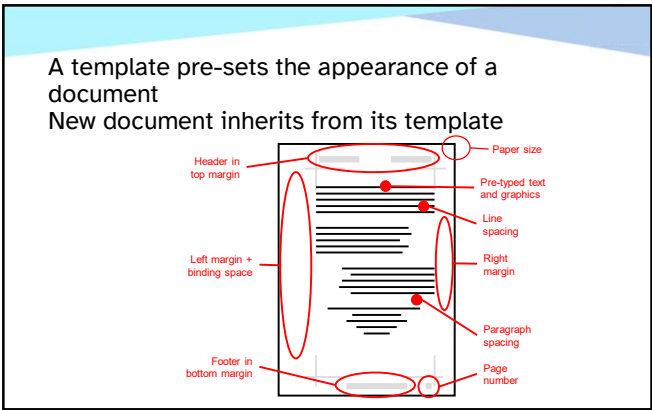
Making up a book

Re-structuring a large document

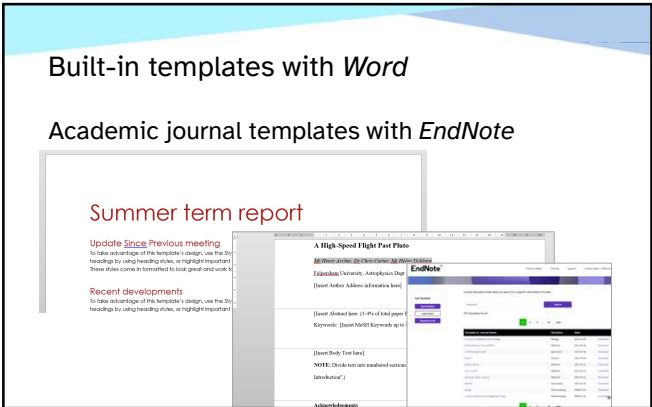
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Creating a new template

Set up a document as required
Page layout, some content, styles



Save it as a template in the Custom Office Templates folder

Use the new template

New

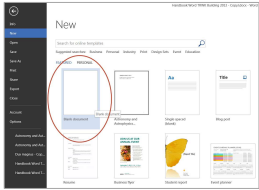
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The Normal template

Normal.dotm
Used for creating plain new documents

Found in separate folder

Edit Normal template
Changes future documents



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Building Long Documents

Look at Learning Objectives One and Two

Resume at 2:45 please


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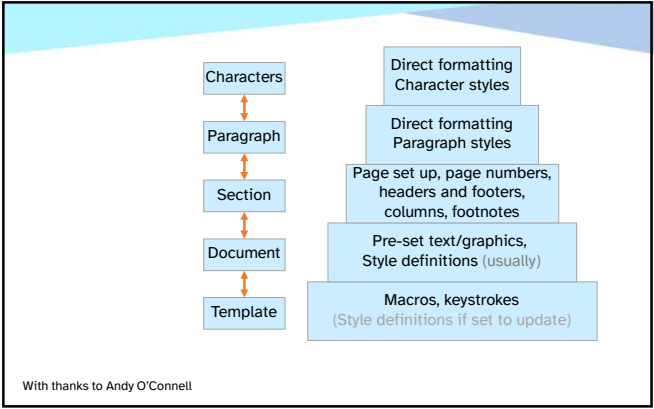
IT

OXFORD

Understanding formatting in Word



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What if I edit a template?

The diagram shows a stack of documents on the left labeled 'existing documents are unchanged'. In the center is a box labeled 'revised template'. On the right is another stack of documents labeled 'new documents will follow the revised template'.

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Converting an older document

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Converting a document – a “heart transplant”

Create a new doc using the special template

Type any small text to fix the Normal definitions etc. ?!
(delete it later)

Use copy & paste:
transfer the old content into the new document

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Building Long Documents

Look at Learning Objectives Three and Four

And take a break...

Resume at 3:30

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Making a book or compound document

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Planning a long book

Design the chapter template *first*

Each chapter in a separate document

Base every document on the same template

Keep many backup copies

Make a new “container” document

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Assembling a long book

When ready, assemble the book

In the container, Insert each chapter

It's a large file!

Version control??

Build table of contents, index etc, insert cross-references

Now ready for printing

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Number sequences in an assembled book

Automatic numbers run through the assembled book:

- Page numbers
- Footnote numbers/endnote numbers
- Automatically numbered headings (if using styles etc.)

But Field code number sequences must be updated:

- Figure numbers, tables, photos etc
- Remember to Update

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Section breaks between chapters (*optional*)

While assembling chapters, maybe insert
section breaks in between

Footnote/endnote numbers can restart at
section break

Page numbers can restart at section break

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Building Long Documents

Look at Learning Objective Five

Resume at 4:05 please

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Browsing and re-structuring a document

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A large document with images

Lots of images will make the document big
Editing may be slow
Back up your work (again)

Try **Draft View** for faster editing

Show Picture Placeholders for faster text editing
In the **Advanced Word Options**

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Navigation pane for travelling around a large document

☒ Navigation Pane

Browse by page thumbnails **PAGES**

Search for more

Browse to next/previous table, graphic, footnote etc.

Browse by headings **HEADINGS**

Map shows paragraphs with built-in styles heading1,2,3 etc.

Click a heading to go there

Use and to hide/view segments

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Outline View shows the hierarchy of headings

Outline View

Expand/collapse headings and their contents

Show selected levels or show all

Click & to select a heading with all its subordinate material

Re-arrange text

Promote and demote headings (with their contents)

Re-order headings and content

Use drag & drop or arrow buttons

Outline

Show Level: All Levels

Body Text

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More help with documents

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OXFORD

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Other related courses

Word: Good Practice in Document Design

EndNote referencing series

See the schedule online

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Building Long Documents

Look at Learning Objectives Six and Seven

Finish at 4:30 please

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