

**Digital gelieferte Seminarunterlagen des
Dettmer-Verlags für Word 2016 - für die
eigenen Schulungen unbegrenzt kopierbar
und auch veränderbar**

Aus technischen Gründen wurde in dieser
Musterunterlage dieses Deckblatt zusätzlich eingefügt,
und anders als im Original-Worddokument haben wir
das Inhaltsverzeichnis am Ende platziert.
Darüber hinaus entsprechen hier auch die Kopf- und
Fußzeilen nicht dem Original.



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16 Tables of Contents and Indexes

16.1 Table of contents

By default, Word creates a table of contents for the headings based on the predefined or modified style sheets. But you may create a table of contents from any style sheet.

How to create a table of contents

1. Position the cursor at the place in the document, at which the table of contents is to be inserted, mostly at the begin of the document.
2. On the **References** tab, **Table of Contents** group, click the **Table of Contents** button. The gallery shown on the right-hand side is opened.
3. From the gallery, select one of the three predefined tables of contents. But only **Automatic Table 1** and **Automatic Table 2** refer to style sheets. Moreover, a numbering is only shown, when the heading styles are numbered (also refer to page 149).
4. If you want to design your own table of contents, click the **Insert Table of Contents** command at the bottom of the gallery. The following dialog box appears:

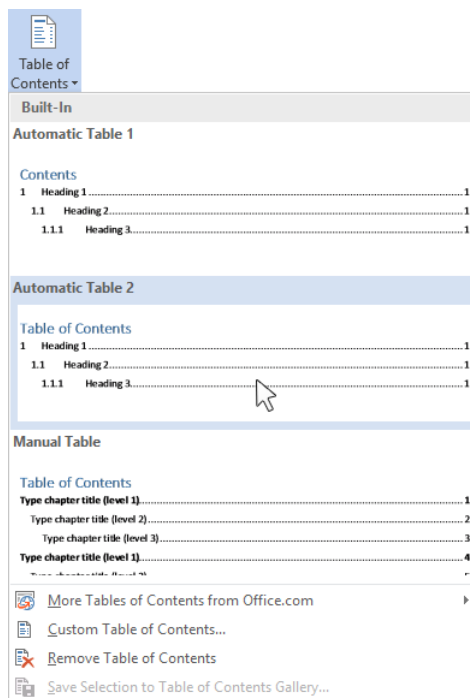


Table of contents gallery

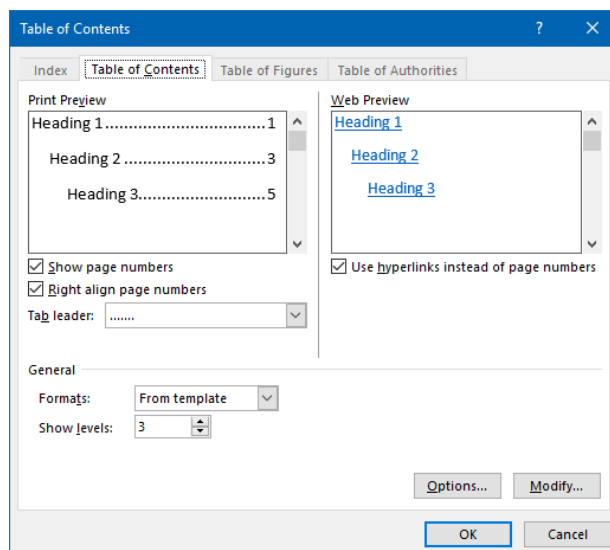
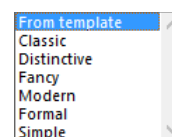
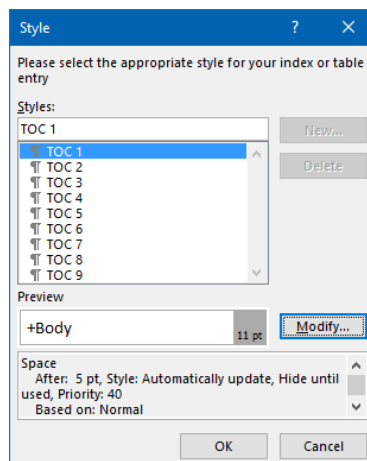


Table of Contents tab page

5. From the list box, select a **Format**.
6. To customize the index style sheets, click the **Modify** button. The following dialog box appears:

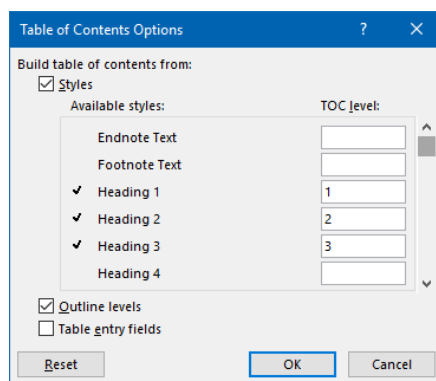


Formats



Modify styles

- When you want to include, in addition to the **Heading 1** through **Heading n** style sheets, more style sheets into the table of contents or to delete style sheets from the table of contents, click **Options** in the **Table of Contents** dialog box. The following dialog box is displayed:

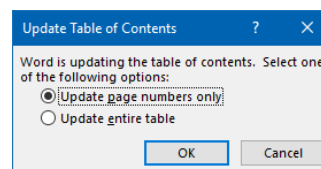


Options for table of contents

- Select the style sheets that should appear in the table of contents, and enter the corresponding level, with level 1 assigned to the **TOC 1** style sheet, level 2 assigned to the **TOC 2** style sheet, etc.
- Click **OK** to confirm your entries. Word returns to the **Table of Contents** dialog box.
- Also click **OK** here. If a table of contents already exists, Word asks to replace it.

Update the table of contents

- Place the cursor in the table of contents. In the field view, place the cursor in the field (**{ TOC \}**). Now press the **F9** key. The dialog box shown on the right-hand side appears. Choose an option and click **OK**.
- Or open the **Table of Contents** dialog box again, as described above. After having made the desired modifications, click **OK**. Depending on the cursor position *before* opening this dialog box, the options appearing in the following dialog box may differ:



Open this dialog box by pressing (F9)

- The cursor is in the table of contents:

: The existing table of contents will be updated.

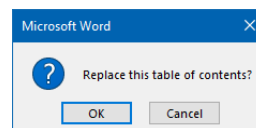
: Abort, the table of contents will not be updated.

- The cursor is *not* in the table of contents:

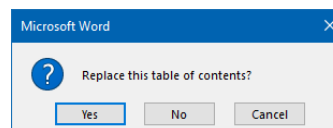
: The existing table of contents will be updated.

: A new, additional table of contents is created at the cursor position. The existing table of contents will *not* be updated.

: Abort, the table of contents will not be updated.



The cursor is in the table of contents



The cursor is *not* in the table of contents

16.2 Index


Creating an index requires index entries to be placed at the respective positions within the text. An example of an index is given at the end of this document.

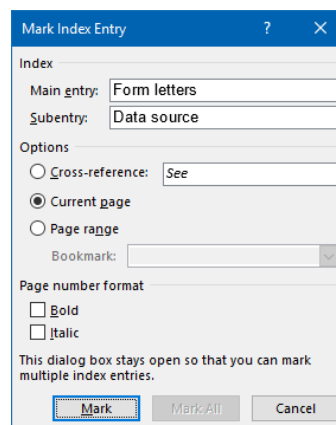
Marking index entries

Word provides the following options for creating an index:

- mark main entries
- mark cross-references
- mark sub entries
- format entries
- define page ranges (e.g. outline 40-45).


How to create an index entry

1. Select the word or the text area that is intended to be an index entry. If the word is not included in the text, place the cursor at the position, at which the index entry is to be inserted.
2. Click the **Mark Entry** button on the **References** tab, **Index** group. The dialog box shown on the right-hand side is opened. When you have selected a word, it will appear in **Main entry**. 
3. Accept or modify the word in the **Main entry** line. You may also enter a **Subentry**.
4. Click to create the index entry. The dialog box remains open, so that you may mark additional index entries.



Mark an index entry



Index entries are formatted hidden. Hidden text is only visible, when the **Show All** button on the menu ribbon **Home** tab, **Paragraph** group, is enabled: 

{ XE "Form letters: Data source" }

Hidden text is underlined by a dotted line.


Creating index entries using a field code

The **XE** field code provides another option for creating index entries:

{ XE "Main entry:Subentry" \t "Cross-reference" }.

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The **lt** and **"Cross-reference"** may be omitted. How to create index entries using the **XE (Index)** field code:

1. To enter the hidden text, use the mouse to select .
2. Place the cursor at the position, at which you want to insert the index entry.
3. Press **Ctrl** + **F9**. A blank field { } is shown.
4. Enter the **XE** field name into this empty field first and then the main and, if necessary, the sub entry, enclosed by quotes. Main antries and subentries are separated by a colon (*without space!*), e.g.:


{ XE "Form letters" } or { XE "Form letters:Data source" }.

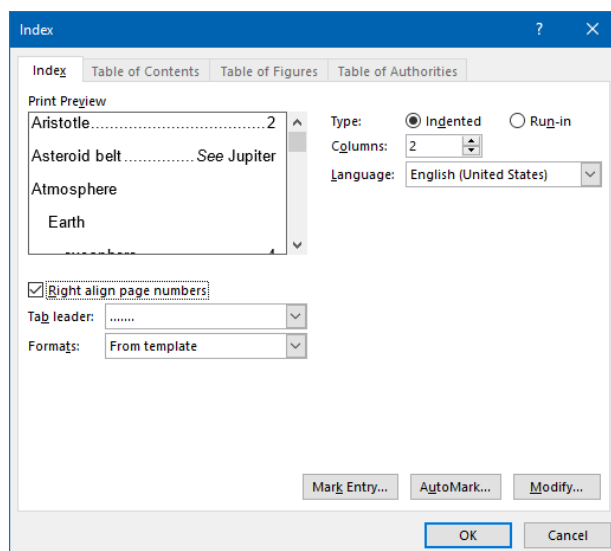
5. Select the entire field and copy it to the clipboard.
6. Place the cursor at the next position, at which an index entry should appear.
7. Insert the field from the clipboard and modify only the main entry and/or subentry within the quotes.
8. Repeat steps 5 and 6 for additional index entries.

Modifying index entries

To modify index entries, you have to make the hidden text visible at first (**Show All** button). Then you may modify the entry in the **XE** field code as desired. 

Creating and updating an index

1. Position the cursor at the place, where you want to insert the index (typically at the end of the document).
2. Click the **Insert Index** button on the **References** tab, **Index** group. The following dialog box is opened: 

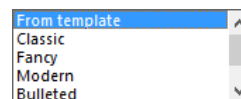


Insert Index

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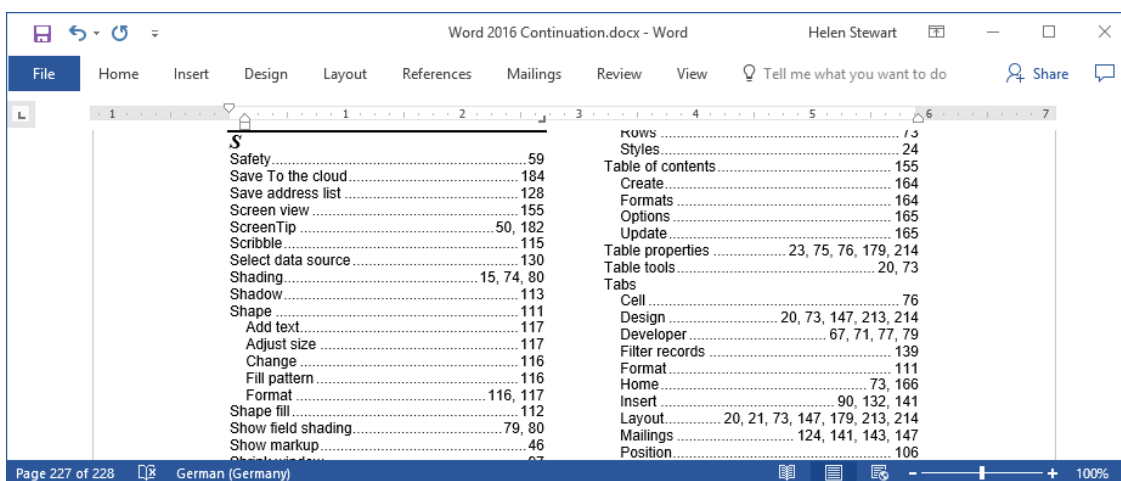
3. Enter the following:

- **Indented** option, when the subentry should appear *below* the main entry.
- **Run-in** option, when the subentry should appear *next to* the main entry.
- Enter the desired number of columns or keep the default setting **2**.
- Select an entry from the **Formats** list box. In the **Print Preview** frame, you see an example index for the current format.
- When you want to **Right align page numbers**, enable the respective check box. Then you may also select a **Tab leader...** for the tab stop gaps, as shown in the following example.



Formats

4. Click to confirm your entries. If an index already exists, Word asks to update it.




Index example

If only the field code is visible instead of the index (e.g. { INDEX \e " " \a \c "2" }), you may show the index using the + shortcut.

Updating index

After having made the view entries, place the cursor in the index. Depending on the settings in the options, the index may be shown including a light gray background color. In the **Options**, you may use the **Advanced** page in the **Show document content** pane to set the **Field shading**. Use the key to update the index.

Editing index styles

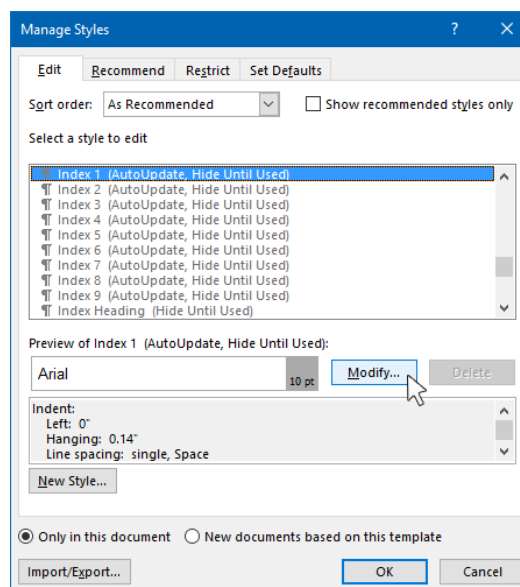
Each paragraph in the index is certainly based on a style sheet: **Index Heading** for the letters of the alphabet, **Index 1** for the main entries, and **Index 2** for the sub entries. If you want to modify these style sheets, it may happen that the styles are not shown in the **Styles** task pane. (open task pane: On the **Home** tab, **Styles** group, click this small  button.)

In this case, click the **Manage Styles** button at the bottom of the task pane. The following dialog box is opened:



On the **Edit** tab, select the respective style sheet and click **Modify**

To show a hidden style sheet in the task pane, click **Show** on the **Recommend** tab page.



Modify the selected style

16.3 Table of figures

You may create tables of figures, lists of tables, or any other indexes. You are required to assign a separate style sheet to each type of index.

Your task

You have created a document containing multiple pages and a lot of illustrations and tables and want to add a list of tables and figures at the beginning of the document, following the table of contents.

1. At first, define two style sheets: the **Table caption** style sheet for labeling the tables and the **Figure caption** style sheet for the illustrations.
2. If a table appears in the document, label it e.g. as follows

Table 1: Shortcuts for paragraph formatting


and assign the **Table caption** style sheet to this paragraph.

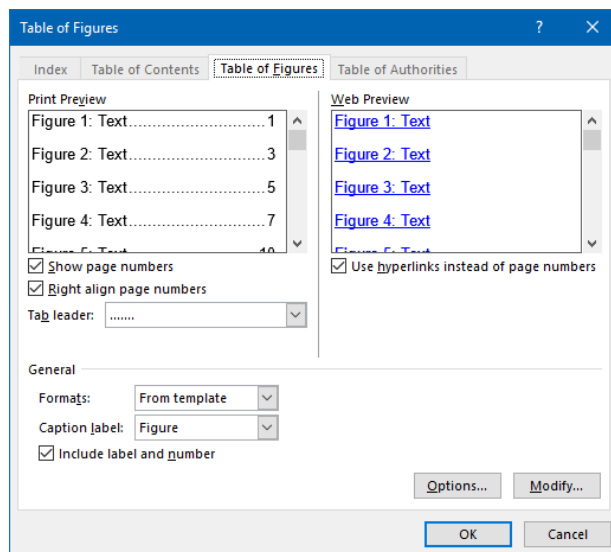
Label an illustration e.g. as follows

Figure 1: Dialog box Character

and assign the **Figure caption** style sheet to this paragraph.

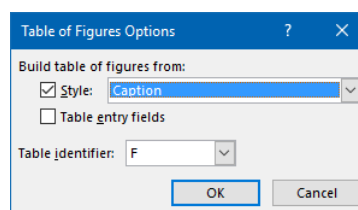
After assigning the style sheets, you may now create a table of figures for the tables and illustrations.

3. Place the cursor at the position within the document, at which the list of tables should appear.
4. Click the **Insert Table of Figures** button on the **References** tab, **Captions** group. 



Create a Table of Figures

5. Click . The dialog box shown on the right-hand side is displayed.
6. Enable the **Style** check box and select the **Caption** style sheet.
7. Click . The **Table of Figures Options** dialog box will be closed.



Options for table of figures

8. When you click also in the **Table of Figures Options** dialog box, the table of figures for the table labels will be created.

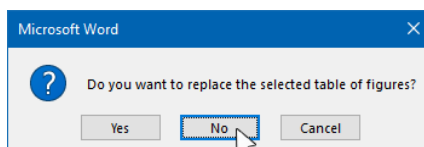
The list of tables might have the following appearance:

Table 1: Shortcuts for paragraph formatting	3
Table 2: Shortcuts for character formatting part 1	9
Table 3: Shortcuts for character formatting part 2	13
Table 4: Shortcuts for highlighting text	21
Table 5: Shortcuts for cursor positioning.....	33

Example for a list of tables

To create a table of figures, you may use a similar procedure as used for creating the list of tables. However, you need to assign the **Figure caption** style sheet. Please make sure that the cursor is not in an existing index!

After clicking in the **Table of Figures** dialog box, the following question appears. Click to create another table of figures. When you click , the list of tables will be replaced!



Replace table of figures? No!

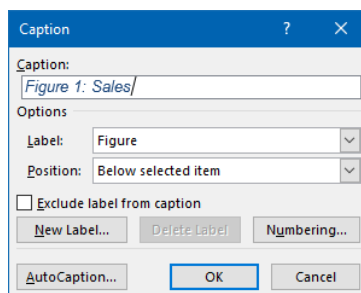
Creating a table of figures with the aid of captions

1. Select the item and click the **Insert Caption** button in the **Captions** group of the **References** tab. The **Caption** dialog box opens.



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- The caption for the item has already been entered automatically (e.g. **Figure 1**). Add the explanatory text that you want to be displayed in your document, for example:



Adding a caption

- In the **Label** drop-down box select the item type, e.g. **Figure** or **Table**. If the desired type does not exist, you can use the button to create a new type, which will then be selectable in the drop-down list.



If you want to gather different item types, like images and tables, in the same table of figures, it is recommended that you choose the same label for the relevant items, e.g. figure.

- Use the **Position** drop-down box to determine whether the caption is to be displayed above or below the item.

- With the button you can choose a different numbering format where necessary.

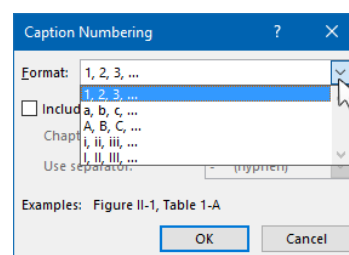
- With a click on the caption is assigned to the item and you can create the table of figures.

- Place the cursor in the document where you want the table to appear, and click the **Insert Table of Figures** button on the **References** tab in the **Captions** group.

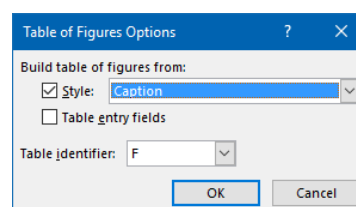
- In the **Table of Figures** dialog box from page 162 click .

- Activate the **Style** check box, select the **Caption** style and click . The **Table of Figures Options** dialog box is closed.

- Once you click in the open **Table of Figures** dialog box as well, the table of figures is created.



Changing the numbering format

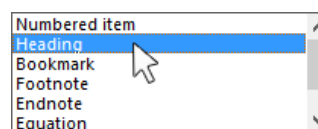


Options

16.4 Cross-reference

A cross-reference is used to point to another position within your document, e.g. to a page number. You may use the following items:

- numbered items
- endnotes
- headings
- equations
- bookmarks
- figures, or
- footnotes
- tables.



Reference types

Bookmarks can be placed at any position and serve as a kind of *hidden, invisible* marker to which you can switch at any time via the following dialog box. In addition, bookmarks can be

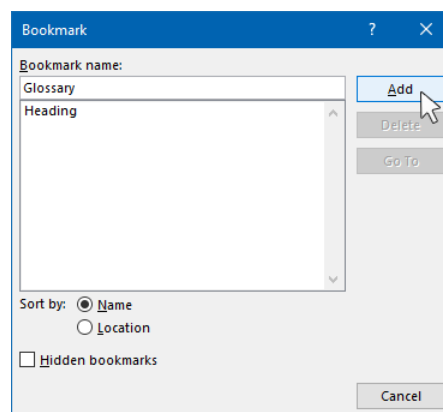
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used in the context of cross-references, for example to refer to their contents or to the page on which the bookmark is found.

To create a bookmark,

1. place the cursor at the position you want or select the heading, picture, or text area the bookmark shall refer to.
2. Then, press the **Shift**+**Ctrl**+**F5** keyboard shortcut or on the **Insert** tab, in the **Links** group, click the **Bookmark** button.
3. In the dialog box shown on the right, enter a name for the bookmark and confirm it by clicking **Add**.

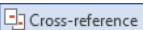
You should choose a significant name and keep in mind that it cannot contain spaces or hyphens, but underscores can be used as separators.

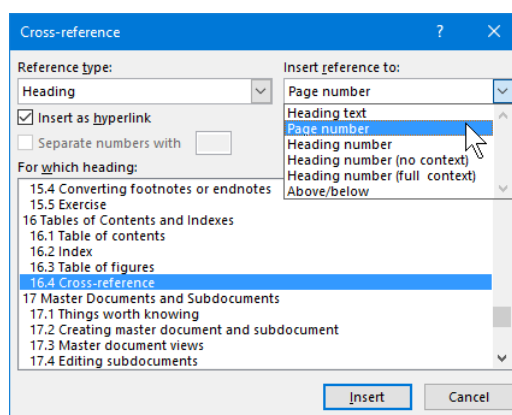


Creating a bookmark

Via this dialog box you can also jump to a bookmark from any place in the document: Open the dialog box (**Shift**+**Ctrl**+**F5** keyboard shortcut), select the bookmark in the list and click **Go To**. To delete the bookmark, select it and click the **Delete** button.

How to create a cross-reference

1. At first, enter an explanation, e.g. "refer to page", at the respective position in the document.
2. Position the cursor at the place, where you want to insert the cross-reference. In the example mentioned above, this is the position to the right of the space after the word "page".
3. Click the **Cross-reference** button on the **References** tab, **Captions** group.  The following dialog box is opened:



Insert cross-reference

4. Select the appropriate heading.
5. Clicking the **Insert** button will place the corresponding page number at the cursor position.



Enable the **Insert as hyperlink** check box, when you want to use the cross-reference as a link. Clicking the reference (page number) will switch to the linked position. If the mouse pointer does not change its appearance while



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pointing onto the reference, additionally press the **[Ctrl]** key. Following a hyperlink with or without using the **[Ctrl]** key is set in the Word **Options**, on the **Advanced** page, **Editing options** pane.

Field code

The cross-reference has been inserted as a field using the **PAGEREF** field name. Place the cursor in the field and press the **[F9]** shortcut to see the field code, e.g.:

{ PAGEREF _Ref168552912 \h }

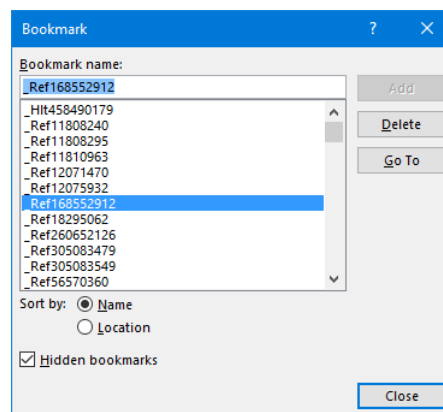
The link refers to a hidden bookmark (**_Ref168552912**), which Word generated while creating the cross-reference. The **\h** switch means that the cross-reference was inserted also as a hyperlink.

Press the **[Shift]+[Ctrl]+[F5]** shortcut to access the **Bookmark** dialog box. Enable the **Hidden bookmarks** check box to see the hidden bookmarks.

If you deleted the respective bookmark, the following message would appear for the field code:

Error! Bookmark not defined

However, this error message does not necessarily appear after deleting, but only after an update, as described below.



Hidden bookmarks

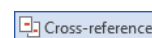


If you want to replace text, which contains bookmarks, with text from another document with the same bookmarks, you should delete the old text in the destination file *first* before inserting the new text from the source file! Otherwise, the bookmarks may not be available in the destination file anymore!

Modifying cross-references

To change the reference information, i.e. the reference type of a cross-reference, proceed as follows:

1. Select the cross-reference (field), but *not* the corresponding explanation.
2. Click the Insert **Cross-reference** button on the **References** tab, **Captions** group.
3. In the **Reference type** list box, select the new item to refer to.



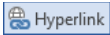
To modify the explanation ("refer to page") of a cross-reference, edit the text within the document as usual.

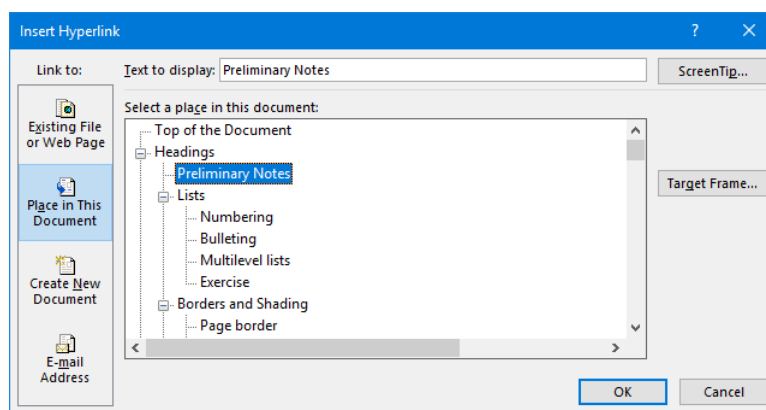
Updating cross-references

Select the cross-reference to be updated or the entire document, if you want to update all cross-references. Then use the **[F9]** key to update the references. The update is automatically performed, when the **print view** (print preview, pages 57) is opened, and before printing, if the **Update fields before printing** check box is activated in **Word Options** on the **Display** page.

16.5 Inserting a hyperlink to an item in a document

You can also jump to headings or bookmarks in the same document with the help of a hyperlink:

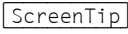

1. Select the passage or the object (e.g. an image) that you want to format as a hyperlink. If, like in our example, the hyperlink shall display the label of the target (e.g. **Preliminary Notes**), simply place the cursor at the position in the document where the hyperlink is to be inserted.
2. On the **Insert** tab, in the **Links** group, click the button shown on the right. 
3. In the **Insert Hyperlink** dialog box, in the **Link to** pane on the left, activate the **Place in This Document** button and select the place the link shall lead to in the list (e.g. the top of the document, one of the headings, or a bookmark), in our example **Preliminary Notes**.




Creating a hyperlink



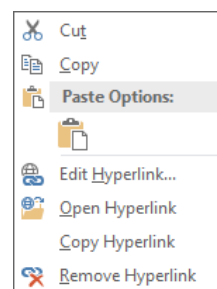
Headings are only displayed in the list, if one of the standard heading styles has been applied to them.

4. The **Text to display** box shows, which text will be displayed in the document. However, you can overwrite it.
5. If required, you can use the  button to enter an individual text, which will be displayed as a ScreenTip, when you point the mouse to the link.
6. Confirm your selection by clicking .

Editing and removing a hyperlink

To edit a hyperlink, right-click it and select the **Edit Hyperlink** command from the context menu. Make the changes in the **Edit Hyperlink** dialog box and confirm them by clicking .

To remove the link, click the **Remove Hyperlink** command from the context menu.



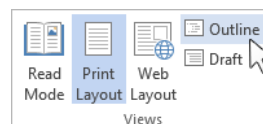
Context menu (cut-out)

17 Master Documents and Subdocuments

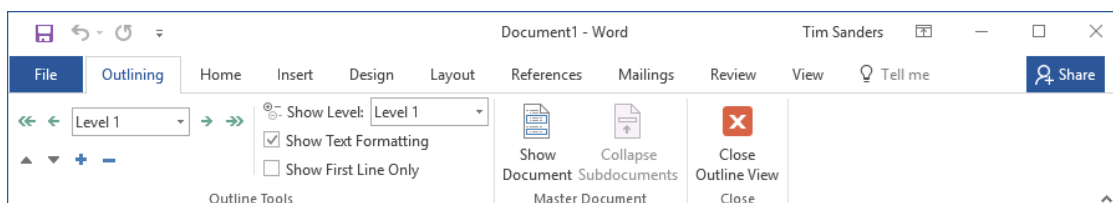
A master document is used to split comprehensive documents (e.g. books) into multiple files and to manage them. In master document view, you may split your document into subdocuments, so that Word creates multiple files, when you save your document. Subdocuments are thus separate Word files that you may edit without the master document.

Benefits of master documents and subdocuments

- Easy re-structuring of large documents.
- The small subdocuments may be edited without loading the master document.
- You may quickly move or jump within a master document, since not all subdocuments have to be opened.
- Cross-references may be created among the subdocuments.
- Table of contents, outline, and index are created from multiple documents.

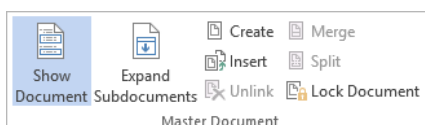


When you click the **Outline** button on the **View** tab in the **Views** command group, the following **Outlining** tab containing the **Master Document** group is displayed:



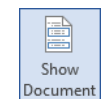
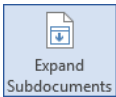
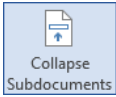
Outlining tab showing the Master Document command group

In the **Master Document** group, click the button shown on the right-hand side to see the commands for managing subdocuments.






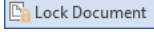



Master Document group showing the controls

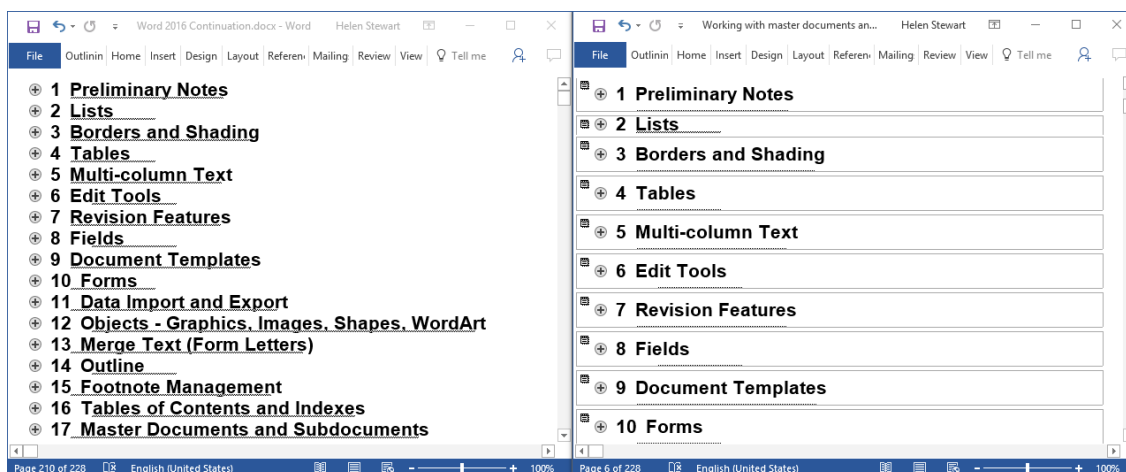
The following buttons are used to edit master documents and subdocuments:

Button	Button name	Meaning
	Show Document (master document view)	Switch to master document view.
	Expand Subdocuments (only when collapsed)	The contents of the subdocuments is displayed completely.
	Collapse Subdocuments (only when expanded)	Only the complete path to the subdocument file is displayed.

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Button	Button name	Meaning
	Create subdocument	Subdocuments are created for the selected headings.
	Insert	An existing document is inserted as a subdocument.
	Unlink	The link to the subdocument is removed and the contents incorporated into the master document.
	Merge	Multiple separate subdocuments are merged to one single subdocument.
	Split	A subdocument is split into two subdocuments.
	Lock Document	The current subdocument (cursor position) is  read-only and thus cannot be modified.

The following example shows that the respective headings of the **1st level** (Preliminary Notes, Lists, Borders and Shading, etc.) are always the beginning of new subdocuments:



Right-hand window showing an example for a master document

17.1 Things worth knowing

- Based on the headings of the original document, Word can split a document into subdocuments. Thus a new document is created for each heading of the 1st level.
- The style sheet that is assigned to the first paragraph of the selection determines, which style sheet is used to create a new subdocument.
- When the master document is saved after splitting, Word automatically uses the headings as file names when creating subdocuments, e.g. **Lists.docx**, **Tables.docx**, including the complete path to the subdocument file.

Please note: If the heading contains a hyphen, Word uses as file name only the part before the hyphen.


- In the collapsed master document view, the subdocument is opened by a mouse click while holding down the **Ctrl** key.

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- You may rename subdocuments, when you access them from the master document and then rename them. To do this, click the **Save As** command from the **File** menu.
- When you open the subdocument as a single document and change the file name, the master document will no longer be able to locate the subdocument.

17.2 Creating master document and subdocument

Now you create a master document and multiple subdocuments, using the following example:

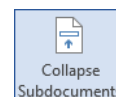
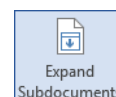
1. Open the **Exercise Outline.docx** file from page 151. This document contains the table of contents of this course document including the **Fields** chapter as well as the first three subheadings without page numbers, but including the Heading 1 and Heading 2 style sheets.
2. Save the document using the name **Master.docx**.
3. Switch to Outline view.
4. Select the *entire* text using e.g. the **Ctrl**+**A** shortcut.
5. On the **Outlining** tab, **Master Document** group, click the **Create** button. If this button is not available, click the **Show Document** button beforehand. The result:
 - Word places a frame around each subdocument.
 - For each subdocument, an  icon appears in the upper left-hand frame corner.
 - A section break is inserted after each subdocument. (When you want to make the section breaks visible, click the **Show All** button in the **Paragraph** group of the **Home** tab.)
6. Again save the master document using the name **Master.docx**. The subdocuments are saved on the drive only now! Word has automatically used the headings 1 for the file names of the subdocuments.



17.3 Master document views

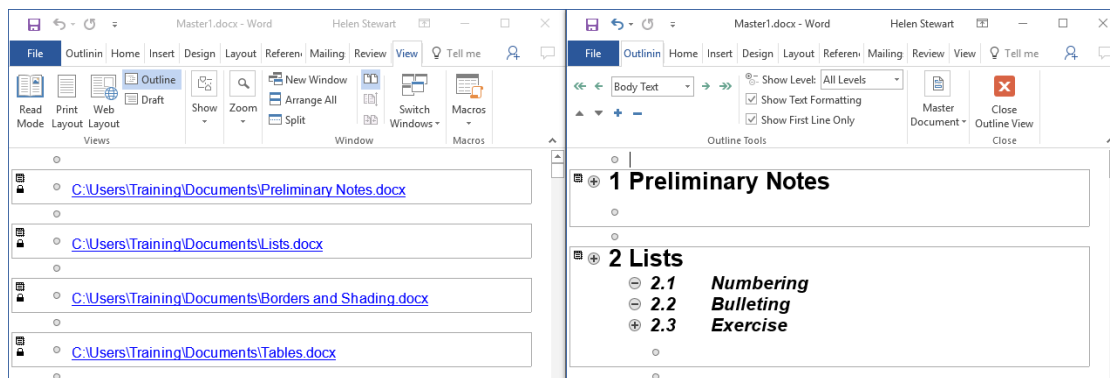
Use the switch buttons shown on the right-hand side to switch between two views of the master document:

- The collapsed view, which shows only the path to the subdocument files as a blue link. To see the subdocument contents, click the **Expand Subdocuments** button.
- The expanded view, which shows the complete subdocument contents. For collapsing, click the respective button.



To obtain the following illustration, the **Master.docx** master document was copied using the **Save As** command (**Master1.docx**). Now the two documents are displayed side by side, with only the paths to the subdocument files shown in the left-hand document pane, and with the complete contents in **Outline** view shown in the right-hand document pane:

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Two identical documents: paths to the subdocument files shown on the left-hand side, and contents in Outline view shown on the right-hand side

17.4 Editing subdocuments

Now enter text into the subdocuments and format the documents:


Opening and closing a subdocument

1. In the master document, select the  **Subdocument** icon that is located to the left of the **Lists** heading.
2. Word opens the subdocument named **Lists.docx**. If you have not saved the master document beforehand, **Document1.docx** will appear!
3. The **Lists.docx** subdocuments only contains headings. You may add headings or normal text to this document as desired. Also format these additions.
4. Since Word inserts a section break after each subdocument, you may define different headers or footers for each subdocument.
5. After completing your work, save and close the subdocument.
6. Word automatically returns to the **Master.docx** master document. From this document, you may open another subdocument.

Inserting a document as a subdocument






1. Create a new document. Type the following words and assign the style sheets enclosed by parentheses:

Document Templates (Heading 1 style)
Using document templates (Heading 2 style)
Creating document templates (Heading 2 style)
Editing document templates (Heading 2 style)

2. Save the document using the name **Document Templates.docx**.
3. Close the document, e.g. using `Ctrl + F4`.
4. Place the cursor at the end of the **Master.docx** master document.
5. On the **Outlining** tab, **Master Document** group, select the  button. The **Insert Subdocument** Explorer window is displayed. Select the file name **Document Templates.docx**.
6. Click `Open`. Word adds another subdocument to the end of the master document. The master document has been extended by the contents from **Document Templates.docx**.




Merging subdocuments

Merging means that you combine multiple subdocuments into one single subdocument. In our example, now merge the subdocuments **Tables.docx** and **Multi.docx** to one single subdocument named **Tables.docx**.

1. In the **Master.docx** master document, select the  **Subdocument** icon next to the **Tables** heading. The subdocument will be selected.
2. While holding down the  key, select the **Subdocument** icon next to the **Multi...** heading. This subdocument will be selected as well.
3. On the **Outlining** tab, **Master Document** group, select the  button. The  icon next to the **Multi...** heading will be deleted. Now the contents of the **Multi.docx** subdocument is found in the **Tables.docx** subdocument.
4. Check this by double-clicking the  icon to open the **Tables.docx** subdocument.

Splitting subdocuments

Now split the just merged subdocument into the documents named **Tables.docx** and **Multi.docx**.

1. In the master document, click the beginning of the **Multi...** heading. Now the cursor is flashing to the left of the letter **M**. Make sure that nothing is selected!
2. On the **Outlining** tab, **Master Document** group, select the  button. Word places the **Multi...** heading ahead of the  **Subdocument** icon.
3. Again save the master document using the name **Master.docx**.
4. Open the **Tables.docx** and **Multi.docx** documents by double-clicking the respective  icons and check their contents.



Removing subdocuments

There are two options for removing subdocuments:



- The contents of the subdocument should be kept and saved in the master document.
- The contents of the subdocument should be removed from the master document.

Keeping the contents of the subdocument and saving them in the master document

In our example, you want to keep the contents of the **Document Templates.docx** subdocument and save it in the master document:

1. Select the  icon next to the **Document Templates** heading. The entire subdocument will be selected.
2. On the **Outlining** tab, **Master Document** group, select the  button. The **Subdocument** icon is deleted and the contents is now part of the master document.

Deleting a subdocument including its contents from the master document

1. To delete a subdocument including its contents from the master document, select the  icon to select, e.g. next to the **Edit Tools** heading.
2. Press the  key. Word deletes the subdocument including its contents from the master document.



The subdocument is deleted only from the master document. It still exists on the hard disk.

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