Workshop Information

Information Technology Services is happy to provide you with this training opportunity. We hope you enjoy it and the time you invest in participating is valuable to your work here at Massey University.

**Workshop Objective**

To demonstrate advanced word processing and layout features of Microsoft Word 2010, and allow you to practice using these features in a learning environment so that you can be more confident in creating complex work or study documents.

**Pre-requisite Skills**

To enable you and other workshop participants to get the most of this learning opportunity, please ensure you possess the pre-requisite skills for this module before you participate, as outlined below.

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<th>Module</th>
<th>Pre-requisite Skills</th>
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<td><strong>Document Elements</strong></td>
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<tr>
<td></td>
<td>A basic skill level in using Microsoft Windows, and in particular Microsoft Office,</td>
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<td>applications is required before completing this module. For example you should be</td>
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<td>able to; open and close applications from the start menu, minimise and maximise</td>
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<td>windows, navigate ribbons, click-and-drag, right-mouse-click, copy and paste, save</td>
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<td>and save-as, and undo.</td>
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<td><strong>Level 2</strong></td>
<td><strong>Short Documents</strong></td>
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<td>It is helpful for you to have knowledge of and confidence in using all of the</td>
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<td>features demonstrated in the Level 1 module. These include:</td>
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<td>features demonstrated in the Level 2 module. These include:</td>
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<td>features demonstrated in the Level 3 module. These include:</td>
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Learning Outcomes

On completion of this workshop you will have a knowledge of and be confident in using the following features of Word 2010:

- Master Document and Subdocuments

You will also have a knowledge of and be confident in the resources available for:

- File Management
- Data Capture and Analysis

Format

Face to face workshop, duration approximately 2.5 hours.

Additional Resources

http://office.microsoft.com/en-nz/support

A reliable source of information and training on how to use Microsoft Office applications is available online at office.microsoft.com.

www.lynda.com

Massey staff now have full access to lynda.com, an online learning environment that teaches the latest software tools and skills through high-quality instructional videos taught by industry experts. Login with your Massey Network Usercode and Password.

Help

Postgraduate students can access further assistance at Library Information Commons IT Helpdesk on each campus 8am and 6pm weekdays.

Staff can access further assistance by contacting the ITS Service Desk on extension 82111 7:45am - 5pm weekdays (excluding Public and University holidays).

Feedback

http://www.massey.ac.nz/itstraining/feedback/

After this workshop please complete our online ITS Training Feedback form. Your feedback is appreciated. Hearing from you about your learning experience allows us to improve the relevance and quality of this training.

A digital copy of this document is available online. ITS thanks you for considering the environment before printing.
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Open Word 2010 - New Document

Using Microsoft Word 2010 for Windows

**Introduction**
In this workshop we will explore more functionality available to create long and complex Word documents for work or study.
You will create a thesis like document using a master and sub-document structure.

**Open Word 2010**
Start Word using the Windows Start button.

**Blank Document**
By default a new blank document is open on screen.

**Save As**
Save your document to the Desktop of your training PC. Save file as:
*Firstname Surname Word 2010 (L4) Exercises*
File Management Using Windows 7

A guide for Massey University postgraduate students

Introduction

As a postgraduate student you will likely be required to create a range of written documents, including assignments which comprise a number of different files. For example:

- Literature review
- Thesis / dissertation
- Abstract
- Article critique
- Oral presentation
- Research proposal
- Article / conference paper
- Essay
- Report
- Business report

These documents will often be reviewed (proofed and edited) a number of times before being submitted or published.

Where you store these documents and contributing/supporting files, and how you manage each version is important. In this topic, we introduce you to some best practice concepts for:

- File storage
- Folder structure
- File saving and naming
- Versions
- Backup
- Protection

Consider implementing these as early as possible in your postgraduate study so that you can avoid data loss through file corruption, file loss or version confusion.

Your Responsibility

It is your responsibility to safely store, save different versions and regularly save a copy (backup) of your files so that, in the event of file corruption, theft of storage, or loss (e.g. accidental deletion), you can retrieve earlier versions.

If you lose data it may be able to be recovered but there are no guarantees, so take care of your files to avoid the pain of data being lost permanently.
File Storage

Recommendation

Decide where to save your files. It is strongly recommended you:

- Choose a Massey Network Drive location to store your files so they are backed up to a server

**DO NOT**

- Store your files on your Local Disk (C:) Drive
- Store your files on a USB/Flash Drive – only store copies for backup or portability

Massey Network Disk Drives

Storing your files on a Massey network drive is secure.

Data is backed up, which means that a copy of your files is placed on a server and can be recovered in the event of a disaster (e.g. flood, fire).

| Staff and postgraduate students with a staff-like usercode (e.g. jbloggs1) can use their home drive (H:) or a shared drive space to store files. | Undergraduate students and postgraduate students with a student ID (e.g. 87654321) can use their home drive (H:) to store files. |

<table>
<thead>
<tr>
<th>Home Drive (H:)</th>
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Your home drive (H:) is a secure network storage area separated so that only your own files are stored in that location.

**Access** your home drive (H:) from the **Desktop** or from **Windows Explorer**:

1. Click **Computer** or **My Computer**.
2. Your drive will display in list of network locations.

You are allocated an **amount of file storage** to use:

<table>
<thead>
<tr>
<th>Staff and postgraduate students with a staff-like usercode = 20GB</th>
<th>Under-graduate and post-graduate students with a student ID = 50MB</th>
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<td>Example: jbloggs1(\tur-homes2) (H:)</td>
<td>Example: 87654321(\tur-homes1) (H:)</td>
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Shared Drive

A shared drive is a secure network storage area with access permission granted by the drive owner (e.g. a supervisor or department manager). Files stored here can be shared by other people who also have permission to access the drive. New shared drives are allocated 20GB of file storage.

Note: Access to your shared drive(s)

You will need to know the name and network location so that you can map the drive (view it in your Windows Explorer navigation pane). Ask your manager or supervisor about which shared drive(s) are available for your use, and how to gain access permission.

Map a Shared Drive

1. On Windows Start menu right-click Computer > select Map network Drive.

2. Choose a Drive: letter other than (H:) (one that has not already been used).

3. In the Map Network Drive window > in the Folder text box, type the shared disk space location.

   For example \massey\disk\shares\nameofdrive.

4. Click Finish to close window.

Resource Links: File Storage

More information about File Storage can be found on our ITS web pages:

- Saving work
- Mapping a Shared Disk Space

For further assistance contact the ITS Service Desk on extension 82111.
Folder Structure

Folder Structure

Once you have decided where you will save your files, create a folder structure in that location to hold all your sub-folders and files.

Create a Parent Folder

1. Using Windows Explorer navigate to the network shared drive.

2. Click New folder button at top of window.
   
   OR Right-click on white space in the folder/file pane > on pop-up menu click New > Folder.

3. Rename new folder with a name that describes all sub-folders and files that will be stored inside this folder.

   For example THESIS, MA. J.Bloggs.

Create Sub-folders

1. Using Windows Explorer navigate the network disk drive to the parent folder you created.

2. Click New folder button at top of window.
   
   OR Right-click on white space in the folder/file pane > on pop-up menu click New > Folder

3. Rename the new sub-folder with a name that describes all the files that will be stored inside this sub-folder.

4. Repeat Steps 1-3 to create all the sub-folders you need.

   For example, your folder structure might look like the image shown.

Create & Receive Files

You will use a range of applications (Word, Excel etc.) to create different file types, and you will receive files created by other people via email or file-transfer.

Saving these files methodically into your folder structure is good practice for storing and easily locating them.
File Saving and Naming

**Save As**
Selecting the **File** tab > **Save As** allows you to name and save a Microsoft Office file for the first time, and for subsequently saving new versions with different names.

**Save**
Always save your files regularly while you work to protect against potential loss caused by an unexpected network interruption.

*Tip:* **Unsaved files and files saved to lab computer desktops will be deleted when you log off and will not be retrievable.**

**Save Email Attachments**
Always save email attachments to your network disk drive storage area before making any changes.

*Tip:* It is **not** good practice to choose **Open to view/amend email attachments**.

**File Names & Paths**
**File names** should not exceed **31 characters** in length (which is not very long).

*For example:* `This_file_name_is_only_31c_long.docx`

**File paths** are limited to **260 characters** so you might get an error message when naming a file that has a very long file path, or when copying a file into a new location that has a file path longer than its original location.

*For example:* `T:\MS Word 2010\Word 2010 (L4) Thesis Documents\THESIS, MA. J.Bloggs\Thesis\Draft Chapters\A sub-folder with a long name\A Sub-folder with a long name\Another Sub-folder with a long name\And Another Sub-folder with a long name\And Another Sub-folder with a long name\This_file_path_is_263c_long.docx`

**Characters** that cannot be used in a folder or file name: `\ / ? : * " > <`  

**File Name Extension**
A file name extension is a set of characters that helps Windows understand what kind of information is in a file and what program should open it.

It is called an extension because it appears at the end of the file name, following a full-stop.

*For example:* In the file name `myfile.txt`, the extension is `txt`. It tells Windows that this is a text file that can be opened by programs associated with that extension, such as WordPad or Notepad.
Versions

Version Control with Autosave

Autosave will create versions for you.

You can access these versions on the 
File menu > Info > Manage Versions.

However this is not recommended for complex documents.

Save As is a better option, see below.

Version Control with Save As

For version control in Word 2010 that keeps track of your document in different states of draft-review-redraft you will need to use Save As and good file naming conventions.

For example: Take a look at the syntax (pattern) used for a single chapter document which has been saved-as before each phase of review, edit and redraft.
Backup

Backup Your Files  Regularly save a copy of your folder and files stored on a Massey network drive to another storage device.

Take a copy of your folder(s) and file(s) and paste these into a backup location that is separate from the original (authoritative) location you have chosen on the network.

Set yourself a routine to repeat this on a regular basis (daily, weekly, monthly – depending on volume of changes), replacing the backup copy with each new version of the authoritative copy.
Protection

Protect a Word Document

In Microsoft Office, you can use protection to help prevent other people from opening or modifying your files. For example, in Word 2010:

In the open document, on the File tab > in the Info group > click Protect Document drop-down menu to see the options for document protection.

Mark as Final

Mark as Final - Make the document read-only.

When a document is marked as final, editing and proofing is disabled and the document becomes read-only. It helps you communicate that you are sharing a completed version of a document and prevents readers from making inadvertent changes.

Encrypt with Password

Set a password for the document.

When you select Encrypt with Password, the Encrypt Document dialog box appears. In the Password box, type a password. Important: Microsoft cannot retrieve lost or forgotten passwords, so keep a list of your passwords and corresponding file names in a safe place.

Don’t forget the password.

Passwords are case-sensitive. Make sure that the CAPS LOCK key is turned off when you enter a password for the first time.

If you lose or forget a password, Word cannot recover your data.

Other File Protection

There are three other options, which are not recommended either because they are not supported or are not available here at Massey:

- Restrict Editing
- Restrict Permission by People
- Add a Digital Signature
Protect a Windows Folder

It is possible to password protect at folder level in Windows 7, but it requires the use of a third party compression/encryption tool such as 7Zip, which creates an encrypted copy of the file but does not encrypt the file itself.

Encrypt and Compress Folders or Files with 7Zip

7Zip is an application available on the standard Massey Windows 7 operating environment. You can use it to compress and files and folders and encrypt with password protection at file and folder level.

1. Navigate to the folder (or file) you wish to protect with a password > right-click the folder (or file) > select 7Zip > click Add to Archive...

2. In the Add to Archive window > under Encryption enter password and re-enter password > click OK to close window.

3. Once compression and encryption is complete (progress bar will display momentarily) a file with .7z extension is created – this is the compressed and encrypted copy of the selected folder (or file).
Extract Folders or Files with 7Zip

To access the folder or files compressed and encrypted using 7Zip:

1. Navigate to the folder (or file) you wish to extract > right-click the folder (or file) > select 7Zip > select Extract Files...

2. In the Extract window > choose location to extract to > enter the password used to encrypt the file (or folder) > click OK to close window.

3. Once extraction is complete (progress bar will display momentarily) the extracted folder (or file) will be created.
Master and Subdocuments

Using Microsoft Word 2010 for Windows

Introduction

Word doesn’t always handle very long and complex documents well.

Using a master document and subdocuments to split your long document into multiple files is a smart way of managing large amounts of text and formatting features.

Master Document

A master document is a Word file that contains links to other Word files called subdocuments. It is the outline of your whole document.

Subdocument

Content in subdocuments is not inserted into the master document it is only linked, so you can edit the subdocument separately and any changes are incorporated into the master document automatically. These hold content in parts that make up your whole document.

Word 2010 Limits

Here are a few notable limits, in combination with the operating environment, that can cause complications with long and complex document:

- Maximum file size is limited to 32 MB for the total document text only.
  - If document contains graphics, max file size can be larger than 32 MB.

- Size of file that Word can open = 512MB.

- Maximum number of subdocuments in a master document = 255.

Corruption

In online blogs master and subdocuments do not have a great reputation – there is a lot of discussion about how prone to corruption they are.

However, when setup correctly and used with caution, master and subdocuments provide powerful functionality for document writers.

Once you understand how to use master and subdocuments you can decide if it is a solution you want to use, or not.
**Create New or Convert Existing Documents**

If you are new to master and subdocuments, it is easier to learn how they work by creating your master and subdocuments from scratch (then import content from existing documents into your new subdocuments).

However, it is possible to convert existing documents to a master document or subdocuments. This workshop demonstrates both features.

**Final Version of Whole Document**

Until you are confident using master and subdocuments, it is recommended you use them for only the final version of your whole document.

Use good file management practices for the draft-redraft-review and storage of your document files so that you can easily compile the final version of your whole document when you are ready.

Allow yourself enough time before finalising and publishing to compile the whole document using master and subdocuments.

**Before You Get Started Writing**

There are five steps required before you start writing (or importing content into) your master and subdocuments;

1. Decide on a storage **location**
2. Create whole document **folder**
3. Create **master document**
4. Create **subdocuments**, and
5. **Links** to master document.

**Decide on a Storage Location**

The **file path** is an important link between the master document and its subdocuments.

If the file path for any of the linked documents changes after the link is made, the link will be broken.

Therefore, initial consideration of file storage is helpful in preventing the need to move files after links are created.

Following the recommended file management practices, decide which folder will hold your master document and all its subdocuments (these should be stored together).

For example, inside the subfolder titled **Thesis**, show here.
Create Whole Document Folder

To create a whole document folder:

In Windows Explorer > choose an existing folder or create a new folder > give it a meaningful name (for example, Whole Document).

Tip: It is a good idea for this folder to only contain the master and subdocuments of your Whole Document.

Create Master Document

To create the a master document either:

Create a new blank Word document > give it a meaningful name, for example Thesis, MA. J.Bloggs MASTER > save it to the new Whole Document folder.

OR Move and existing document to the Whole Document folder so that it can be used as (converted to) a master document.

Open Master Document in Outline View

To open the master document and view it in outline view:

Open master document > on View tab > in Document Views group > select Outline > launching Outlining tab.
Outline the Master Document

To outline the master document:

In **Outline view** > type text on first line of master document > press **enter**.

For example, type: “First words on the first page of whole document”.

Type text on each line of master document to represent each subdocument.

For example, type a line to represent each content part, and each appendix.

Style Subdocument Headings

Choose a style that will be used to designate headings as the beginning of a new subdocument. For example, if new subdocuments should start with a heading styled with **Heading 2**, choose to use that style here.

To assign the chosen heading style to subdocument headings:

**Highlight headings** you wish to style > use **Demote** arrow to indent headings and assign heading style.

**Note: Promote & Demote Arrows**

*Use the Promote or Demote arrow to indent or outdent headings and see how the assigned heading style changes.*
Show Document

Display controls for managing subdocument links:

On Outlining tab > in Master Document group > click Show Document.

Create Subdocument Links

To create subdocument links:

1. Place cursor next to the first outline heading of subdocument.
2. On Outlining tab > in Master Document group > click Create.
3. Repeat Steps 1 & 2 for each outlined subdocument.

Close Outline View

It is a good idea to save the master document before clicking Close Outline View to view the master and subdocuments in the default Print Layout view.
When subdocuments are **expanded** and Outline View is closed all master document content and subdocument content displays in Print Layout view.

### Return to Outline View

To return to outline view:

On View tab > in Document Views group > select **Outline** > launching **Outlining** tab.

### Hide Document

Toggle off **Show Document** to hide controls for managing subdocument links and to see **section breaks** in the master document. Word inserts a continuous section break before and after each subdocument.

On Outlining tab > in Master Document group > click **Show Document**.
**Collapse Subdocuments**

To collapse the subdocuments:

First **save** the master document > then, on **Outlining tab** > in **Master Document group** > click **Collapse Subdocument**.

The view changes to show the **file path hyperlink** for each subdocument. For example:

Notice the **file name** automatically assigned to each subdocument.

---

**Print Layout View of.Collapsed Subdocuments**

When subdocuments are **collapsed** and Outline View is closed all **master document content** displays, but only **subdocument file path hyperlinks** display in **Print Layout view**.

---

**Move Existing Documents**

If you have existing documents you want to use as subdocuments **move** (or copy) these into your new **Whole Document** folder.
Convert Existing Documents

Once you have moved existing documents you want to use as subdocuments into your new Whole Document folder:

1. In Outline View > toggle on Show Document > select Expand Subdocuments.

2. Place cursor where you want to add an existing document > make sure to click a blank line between existing Subdocuments.

3. On the Outlining toolbar, click Insert Subdocument > navigate to the existing subdocument > click to select > click Open.

4. Repeat steps 2 & 3 for each existing document you want to convert to a subdocument.

For example, existing documents titled Sub-document Content D, E and F have been moved to the whole document folder and then inserted into the master document after Sub-document Content C, and before the appendices.

With Show Document toggled off you can see, for existing documents converted to subdocuments, Word inserts a Next Page section break before the subdocument and a Continuous section break after it.

File Names

With subdocuments collapsed so the file path hyperlink displays, notice the file names of existing documents converted to subdocuments are retained.
Move, Rename or Delete Subdocuments

Change the structure of the document by adding, removing, combining, splitting, renaming, and rearranging subdocuments using the master document Outline view.

For example, after you add a subdocument to a master document, do not move or delete it unless you first remove it from the master document.

Edit Subdocuments

Open a subdocument from the master document. When subdocuments are collapsed in the master document you can click the file path hyperlink to open display the subdocument in a separate window.

Protection

When a subdocument is opened for editing it is “locked” to other users. This means you can view the subdocument but you can’t edit it until the person who is editing it closes the subdocument.

Formatting

When the whole document is viewed and printed the formatting used in the master document takes precedent, and will override any differences in the subdocuments.

If you are new to master and subdocuments it is recommended that you format your whole document’s page layout, page numbers, headers and footers and styles in the master document, and also apply exactly the same formatting to your subdocuments.

You should apply numbering to the heading styles of your master document (not subdocuments) if you want this to flow through the subdocuments when the document is viewed or printed in full.

Resource Links: Master and Subdocuments

More information about master and subdocuments can be found online. Here are a few resources:

Search: Office.Microsoft.com > Support > Word 2003 > Troubleshoot Master & Subdocuments

Office.Microsoft.com > Support > Word 2003 > Create Master & Subdocuments
Complex Documents: Practice Exercise

Using Microsoft Word 2010 for Windows

**Introduction**

In this exercise you will create a master document and subdocuments which represent the compilation of a complex document (a thesis). You will use the skills outlined in the Master and Subdocuments topic. Refer

**Download Files**

Navigate to ITS Training’s Word Additional Resources page:

Massey > search ITS > Training > Courses & Modules > Word > Additional Resources

Download, save and unzip the Whole Document Sample Folder.

- Inside that zip folder is the Whole Document folder.

- Existing in that folder are 8 chapter documents which we will convert to subdocuments of our master document.

- We will create and save our master document and new subdocuments in the Whole Document folder.

**Create Master Document**

Create a new blank Word document > save as Thesis MASTER into the Whole Document folder.


**Outline Master Document**

Open Thesis MASTER document in **Outline** view.

Type headings to represent each of the master document headings you will need and each of the subdocuments which do not already exist.

These include:

- Title Page
- Declaration
- Abstract
- Acknowledgement
- Table of Contents
- List of Tables
- List of Figures
- References
- Appendix I
- Appendix II
- Appendix III
- Index

**Style Subdocument Headings and Create Links**

Using the default Word styles, apply **Heading 2** style to the following headings which represent subdocuments which don’t already exist:

- Abstract
- Acknowledgement
- Appendix I
- Appendix II
- Appendix III

Create subdocument links for each of the headings styles to represent subdocuments which don’t already exist.

**Convert Existing Documents to Subdocuments**

Insert each existing chapter document which already existing in the Whole Document Folder into the master document to convert them to a subdocument.

These should be inserted after the List of Figures, and before References

Using the default Word styles, apply **Heading 2** style to the headings of each converted document.

**Edit Subdocuments**

Edit some of the subdocuments – add text, insert images - save changes and close.
In the master document, expand subdocuments and close the Outline view to view the whole document in the default Print Layout view.

Table of Contents
Insert a table of contents which includes all master and subdocument heading styles. Check that your table of contents is picking up all headings in your whole document.

Modify Font Type for Heading 2 Style
Make Heading 2 use the font type Arial Black.

Header and Footer
Create a centred header that has your name in it, and make that header appear across all pages except the title page.

Resize and Reorient Appendix
Appendix I will need to be resized to A3 and reoriented to Landscape.
Figure out how to do this, and once it is done, adjust the header for just this section so that it is now centred on the A3 Landscape page.
Data Capture, Storage and Analysis

Using Microsoft Word 2010 for Windows

Introduction
This topic is currently under development in.
In this topic:
- Software applications available through ITS
- Storage of data
- Research support

Software
NVivo
SPSS / AMOS
SAS
StatA

For more information go to:

Storage of Data
Refer to File Management section

Research Support
For more information go to:
http://www.massey/research/research-support/research-support_home.cfm