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BUILDING BOOKS WITH *Word*

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A re you a Microsoft *Word* user who needs to create book-length documents, such as user manuals, installation guides, policy and procedure manuals, training workbooks, or any document comprising multiple chapter files for which a single table of contents and/or index is required? Have you struggled with *Word*'s complicated, buggy Master/Subdocument feature? Are you contemplating the switch to *FrameMaker* for the sole purpose of creating books? Are you already a *FrameMaker* user but need to create a book with *Word* for a particular customer? If you answered "Yes" to any of these questions, read on. This article details two methods by which you can create books using Microsoft *Word* without employing the Master/Subdocument feature or macros.

I have used the methods described here to create more than twenty books.

Books can be made with a little planning, preparation, and three of *Word*'s field codes: RD (Referenced Document), TOC (Table of Contents), and INDEX. The RD field is simple, yet powerful. Its purpose is to reference all the chapter files comprising your book so that the TOC and INDEX field codes can generate a table of contents and an index. By creating separate chapter files and using the three field codes, you can create "books" of limitless size.

The procedures in this article are based on *Word 2002/XP*. However, they also work in *Word* versions 97, 2000, and 2003, though the menu options and dialog boxes do vary with each version.

Creating the Book

For our purposes, building a book requires three processes: creating the chapter files, creating the table of contents, and creating the index.

Creating the Chapter Files

1. Create each chapter as its own file. Separate files are more manageable, require less memory than an entire book, and allow multiple authors to work simultaneously. Store all of the book's files in the same folder. This process will simplify the entry of file names used with the RD field codes.
2. Use the Heading1 style for each chapter title. Doing so allows the chapter numbers to be used to prefix captions and page numbers in
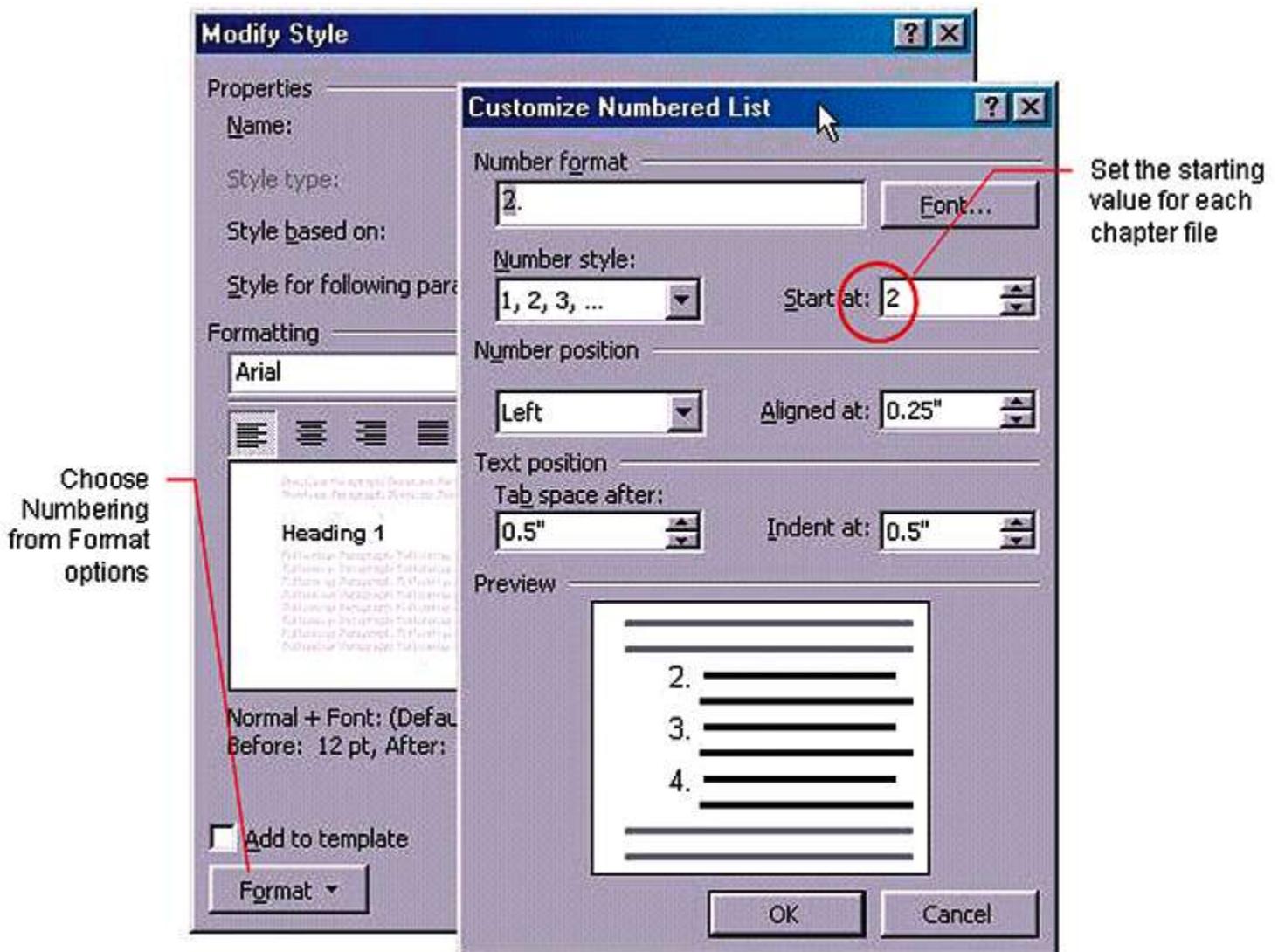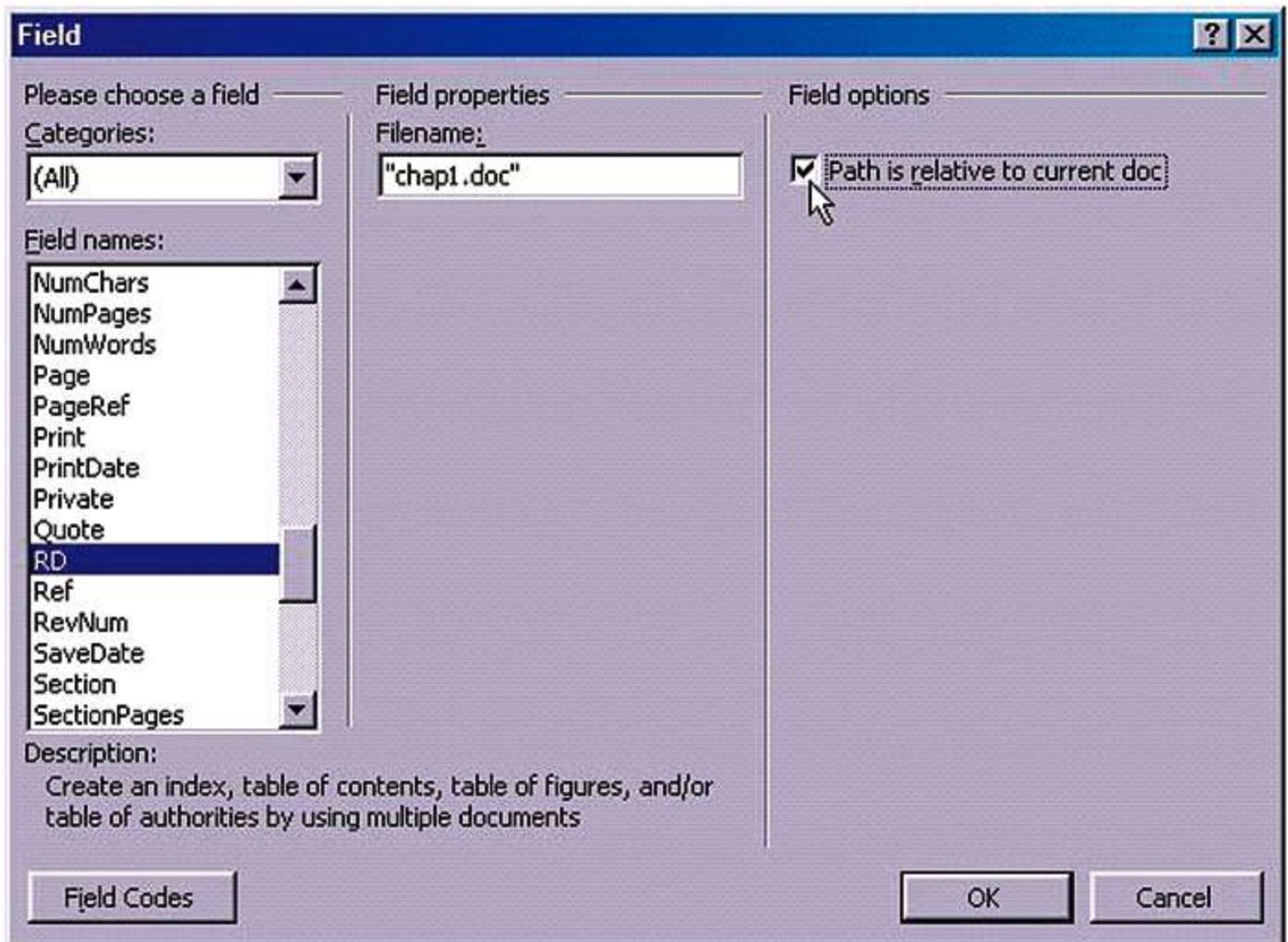
Figure 1. Numbering of chapter titles.

Figure 2. Reference document code settings.

the chapters. Subsequent headings in the chapter can start with Heading2 (numbering them is optional).

3. Manually set each chapter's number (see Figure 1): Select **Format** > **Styles and Formatting** > **Modify** > **Numbering**. Under the **Numbered** tab, select a numbering style, then click **Customize**. In the "Start at" field, set the starting value for the chapter. Since the Heading1 style is used for the chapter's name, set its starting value to indicate the chapter's position in the book. For example, the first chapter will have a Heading1 value of 1. For the second chapter, set the Heading1 value to 2, the next chapter to 3, and so on. You can let the chapter number remain visible or format it as hidden so it doesn't show on the printed page. You can also click the

Font button to color the number white so it is invisible.

4. Format the page numbers and the figure and table captions to include the chapter numbers. The result will be similar to 1–1, 1–2, 2–4, 2–5, 3–2, 3–3, and so on, with the first number of the pair indicating the chapter. (For page numbers, you can define the separation character in the **Page Numbers** dialog box.)

5. End each chapter file on an even-numbered page. Since each chapter will begin on page one (an odd number), the previous page should be an even-numbered page.

Create the Table of Contents

1. Once the chapter files have been created, make a file for the book's front matter, including the cover, title page,

trademarks, and table of contents.

2. In the front matter file, place the insertion point under the table of contents heading.

3. Select **Tools** > **Options** > **View** and check the **Field codes** and **Hidden text** options. Close the dialog box.

4. Select **Insert** > **Field** and highlight the **RD** field listed in the dialog box, as shown in Figure 2.

5. Type your first chapter file name in the **Filename** box. Use quotes if the file is in a folder different from the table of contents file. Otherwise, you can click the **Path is relative to current doc** check box.

6. Click **OK**. This creates a code link on your page that looks like this: {RD chap1.doc}.

7. Repeat steps 3 through 5 for each chapter file.

8. Position the insertion point below the last RD entry and click **Insert** > **Field**.
9. Choose the **TOC** code and click the **Table of Contents** button. The same dialog box is displayed when you select **Insert** > **Reference** > **Index and Tables** > **Table of Contents** tab.
10. Select the table of contents settings from the dialog box as necessary and click **OK**. When you do, the dialog boxes close and the table of contents is generated (even though you can't see it yet) based on the selected styles within the files specified in the RD field code entries.

The code view of the table of contents should be something like this: {TOC\O "1-3"}.

To see the table of contents in text view and simultaneously hide the RD field codes from view:

1. Click **Tools** > **Options**.
2. Select the **Field codes** and **Hidden text** options.
3. Click **OK**.

The TOC entries are displayed instead of the TOC code, and the RD field code entries are hidden from view. Figure 3 shows a partial *before* and *after* example.

The process you used to create the table of contents is similar to the one you'll use to create the index.

Creating the Index

The process you used to create the table of contents is similar to the one you'll use to create the index:

1. Add index entries in each chapter file as needed. (Consult *Word*'s online help, if necessary, for details on marking index entries, setting group levels, and so on.)

2. Create a back matter file for the index heading and the generated index listing.
3. Enable viewing of field codes by selecting **Tools** > **Options**, and turn on the **Field codes** and **Hidden text** options.
4. Place the insertion point under the index heading in the back matter file and enter the RD field codes for each chapter file (as described in steps 3 through 5 of "Create the TOC").
5. Position the insertion point below the last RD entry and select **Insert** > **Field**.
6. Choose the **INDEX** code and click the **Index** button. The dialog box that displays is the same one that appears when you select **Insert** > **Reference** > **Index and Tables** > **Index** tab.
7. Select the index settings from the dialog box as necessary and click **OK**. When you do, the dialog boxes close and the index is generated based on the index entries marked (step 1) in the files specified in the RD field code entries (step 4). Figure 4 shows the RD field code entries and the Index field code.
8. Hide the field codes and view the index entries by selecting **Tools** > **Options**, and turn off the **Field codes** and **Hidden text** options. Figure 5

Figure 3. Table of contents, code and text views.

Figure 4. RD and INDEX field codes.

Figure 5. Partial view of the resulting index.

shows a partial view of the generated index.

Creating a PDF of the Book

If your print shop prefers to work with PDF files, you can create a PDF for each file comprising the book. However, if the print shop wants a single file for the whole book, use Adobe *Acrobat* (or similar product) to append each file successively, until all files have been collected into a single PDF file.

An Alternate Method for Small Books

For books of less than 100 pages or so, you can use an alternate method that eliminates the need for RD, INDEX, and TOC field codes. The process of

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creating separate chapter files is essentially the same. The real difference involves appending the individual files into a consolidated book file when you are ready to issue the book as a whole—similar to the way a single PDF is made from individual PDF files.

Follow these steps to create a small book:

1. Create a front matter file and separate chapter files as before, but it is not necessary to set and use chapter numbers as part of page numbering unless you want them. If you want the page numbers to number sequentially from chapter to chapter, be sure they are formatted using the **Continue from previous section** attribute in the Page Number Format dialog box.
2. End each chapter file with an even-numbered page.
3. Once the front matter file and chapter files have been created, open the front matter file and append the first chapter file:
   a) Go to the last page in the front matter file.
   b) Insert an odd page section break (**Insert** > **Break** > **Odd page**).
   c) Insert a chapter file (**Insert** > **File**).
   d) Go to the last page of that chapter.
   e) Repeat steps b through d until all chapters have been inserted. You may have to insert a page here and there to ensure that each chapter starts on an odd-numbered page. Changing the display view to 25 percent or smaller displays many pages at once, giving a good bird's-eye view of your book.
4. Move to the end of the book, insert an odd page section break, then insert an index (**Insert** > **Reference** > **Index and Tables** > **Index** tab).
5. Return to the beginning of the book and insert a table of contents (**Insert** > **Reference** > **Index and Tables** > **Table of Contents** tab).
6. Save the book as a new file (thereby preserving your front matter file).

If necessary, you can then generate a PDF of the completed book file.

I have used the methods described here to create more than twenty books—some of them in excess of 300 pages. Factors to consider when choosing between the two methods are total page count, number of embedded graphics and tables, and the amount of system memory. Experiment on your next book project to see which method works best for you. ❶

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