

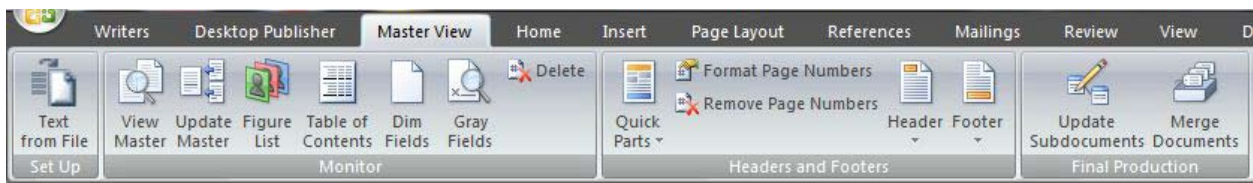
Developing a Master Document

You can create a Master Document at anytime. Some Proposal Centers only create a Master prior to the Review Phase, but once you understand the power and ease of using Master Documents, you may want to create your Master Documents at the same time you create your individual Writers documents. This will allow the Proposal Manager to get a view of what the entire proposal looks like at any given time with up-to-date information. It serves as a great way to monitor the progress of the Proposal from day one to final production without interfering with any of the Writers documents. It basically pulls in the latest copy of the Writers documents into another document that combines all the Sections in to one nice Volume.

During Color Review Production or Final Production, all the files are brought into a single server or shared network. If you are fortunate to have a Network or Shared Drive, the Proposal Manager can also use the Master Document as a tool to monitor the entire Proposal on a daily or even hourly basis. By allowing the Proposal Manager to access the Master Document, he/she will have improved insight into the entire proposal.

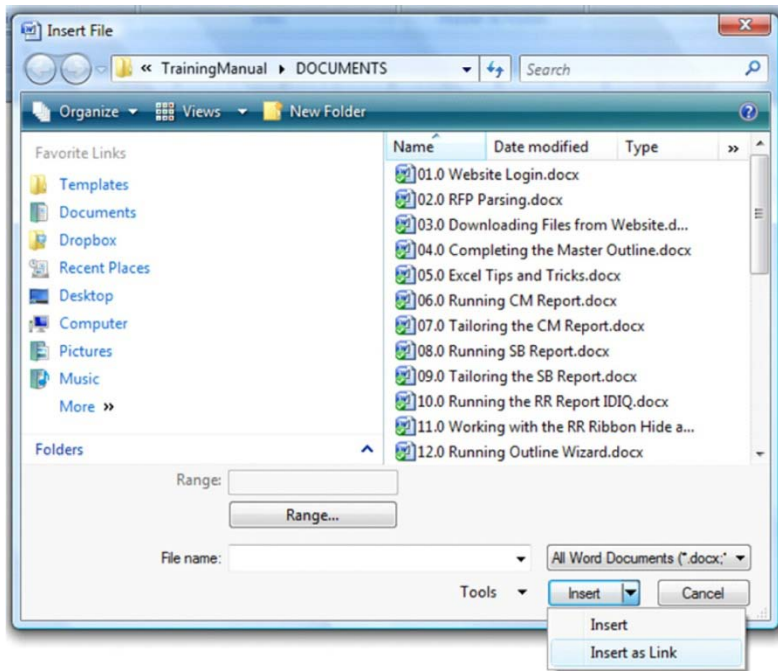
Steps to Creating your Master Document

- 1 Open a document based on a proposal template with the Master View ribbon in it. There are two ways to do this:
 - A. Double-click the Template file (.dotm)
 - B. Attach a Template (.dotm) with the Master View Ribbon in it to a new blank document.
- 2 Choose the Text from File in the Set Up group shown below



Master View Ribbon.

- 3 The Insert File dialog box will appear. Browse to the folder containing the subdocuments, click the second subdocument and hold down the Shift Button and select all the following documents. Now hold down the ctrl key and select the first document.
- 4 After selecting all the subdocuments click the insert arrow in the bottom right hand corner of the dialog box and choose *Insert as Link*, as shown below.



Insert Arrow Drop Down. Be sure to select the arrow and not the word *Insert*.

5 This will insert the text from the selected subdocuments into the current document. You can easily toggle back and forth to view either links or text by using the button located on the Proposal Manager tab in the Monitor Group called View Master.

6 Click Save and close the document.

These simple seven steps will help to create the Master Document so that the Proposal Manager will be able to see the progression of the writers throughout the proposal and have a more accurate page count.

Understanding Headers and Footers

Headers and footers seem easy at first glance, but they can get confusing when working with multiple sections and documents. To start, let's clear up a three common misunderstandings.

1) Templates with Headers and Footers. Even though a Header and Footer can be placed in a Template and will show up in a document that is started from a template, documents that are attached to a template *will not* have the headers and footers in them.

2) Master Documents with Headers and Footers. A master document *does not* transfer Headers and Footers to the subdocuments.

3) Individual Documents with Headers and Footers. Individual documents with Headers and Footers can have their own Headers and Footers and which can be brought into the Master Document *ONLY* with the proper use of Section Breaks.

Although there are many ways to get Headers and Footers into the Master Document and the Individual Document, the steps shown below give you a simple method. By using this method, you will also learn enough about Headers and Footers so that they will never be confusing again.

- 1 Create a single generic Header and Footer for your proposal. Save these to your Quick Parts gallery. (See chapter 20.6 *Creating a Proposal Geeks SMART Header and Footer for more information*)
- 2 Open the document that has the first header and footer inside your proposal. Place the header and footer into the document from your Quick Parts Gallery. Repeat this step for the next document that needs a revised Header and Footer. Edit the Header and Footer for this section with any required changes.
- 3 **IMPORTANT:** Place a SECTION BREAK at the end of the document that precedes the document with the new header and footer. **EXPLANATION:** When you create a master document from

multiple documents, Word creates a single document. The first header in the first document will become the Header and Footer. It will remain the Header and Footer for the entire document unless there is a Section Break. By placing a Section Break at the end of the document that is the last one of a Section, Word will know that the next document starts a new section and that it will have a New Header and Footer.

TIP: When the documents are first created, a section break is placed at the end of all the documents. If you leave these in and insert the proper header and footer for the document into the document, then when you create a Master Document of all the documents, the Headers and Footers will remain unchanged. However, if you have removed any of the Section Breaks; word will only use One Set of Headers and Footers for each Section.