

# Section 6

# Referencing

**By the end of this Section you should be able to:**

**Create, Modify & Delete Footnotes & Endnotes**

**Create, Format & Update a Table of Contents**

**Add & Delete Bookmarks**

**Create & Delete Cross-references**

**Add Captions**

**Create a Table of Figures**

**Create & Edit Index Entries**

To gain an understanding of the above features, work through the **Driving Lessons** in this **Section**.

For each **Driving Lesson**, read the **Park and Read** instructions, without touching the keyboard, then work through the numbered steps of the **Manoeuvres** on the computer. Complete the **Revision Exercise(s)** at the end of the section to test your knowledge.

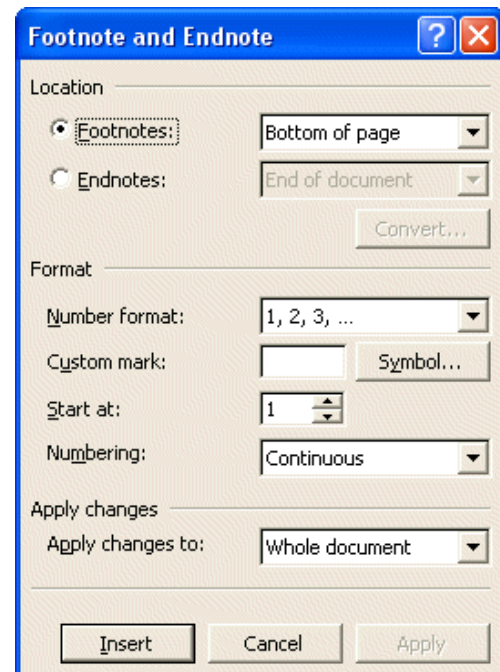
# Driving Lesson 36 - Creating Footnotes and Endnotes

## Park and Read

**Footnotes** are a formalised way of documenting sources for quotations, facts and ideas in a report. A footnote number is automatically placed in the document next to the text to be referenced. The same number appears at the bottom of the page with details about the source of the information. **Endnotes** perform the same function, but are found at the end of a document.

## Manoeuvres

1. Open the document **Discovery**.
2. To create a footnote, position the cursor after **tomb** in the first paragraph and select **Insert | Reference | Footnote**.
3. The **Footnote and Endnote** dialog box appears. Make sure that the **Footnotes** option is checked and that **Numbering** shows **Continuous** then click **Insert**.
4. The cursor moves to the bottom of the page, ready for the text to be entered into a special footnote area. Enter the following text: **Evidence was found of early grave robbers**.
5. Use the scroll bar to move back to the main document and notice how the **reference mark**, the number **1**, has been inserted in the correct place.



*If using **Normal View** the footnotes can only be seen with **View | Footnotes** switched on.*

6. Insert the following footnotes:

Paragraph 2, after **Carter: Lord Caernarvon financed the dig**.

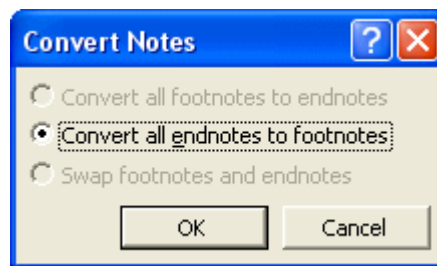
Paragraph 3, after **canopic jars: Alabaster or clay pots with the heads of Egyptian deities for lids. Each watched over a particular body part**.

Paragraph 4, after **bandaged body: Jewels and other precious items were found in the wrappings**.



## Driving Lesson 36 - Continued

7. Save the document as **Noted** and close it.
8. Open **Discovery** again.
9. Insert a page break before the fourth paragraph.
10. Position the cursor after **tomb** in the first paragraph and select **Insert | Reference | Footnote**.
11. This time select to insert an **Endnote** and click **Insert**.
12. Enter the same text as in step 4.
13. Insert the notes in step 6 as **Endnotes**.
14. Print the document.
15. Endnotes can be converted to footnotes and vice versa. Select **Insert | Reference | Footnote** and click **Convert**.



16. Ensure **Convert all endnotes to footnotes** is selected and click **OK**.
17. Click **Close**. Footnotes have replaced the endnotes.
18. To convert them back to endnotes, select **Insert | Reference | Footnote** and click **Convert**.
19. Select **Convert all footnotes to endnotes** and click **OK**, then click **Close**.
20. Save it as **Endnotes** and close it.



*Footnotes are always displayed in **Print Layout** view.*

# Driving Lesson 37 - Modifying/Deleting Footnotes and Endnotes

## Park and Read

Footnotes and endnotes can be edited, formatted and deleted in the same way as normal text. There is a widely observed convention that footnote reference numbers are entered in superscript form.



## Manoeuvres

1. Open the file **Birds**. This document contains four footnotes.
2. The footnotes are displayed at the bottom of the screen and the **Captions** are displayed when the cursor moves over one in the text. Move the cursor to **Footnote 1** and read the caption.
3. There is a mistake in the second footnote, the food referred to is **fat balls** and not **fatballs**. Edit the text as required.



*Double click on a reference number in the text to go directly to a footnote or endnote.*

4. Select the first reference mark in the text and then delete it. The footnote text is also removed and the remaining footnotes are automatically renumbered.



*If a footnote is deleted, the footnote reference mark is not removed. However, if the reference mark is deleted, the corresponding footnote is removed along with it. Great care, therefore, must be exercised when removing footnote reference marks.*

5. Use **Print Preview** to check the appearance of the document.
6. Print a copy of the document and close it without saving the changes.

# Driving Lesson 38 - Creating a Table of Contents

## Park and Read

It is possible in *Word* to create various reference features in a document such as **tables of contents**, **indexes**, **cross references**, and **captions**. Once these tables are created, they can automatically be updated, if any of the information is changed.

A table of contents is based on styles within a document. Certain heading styles are chosen, and all text in the document that uses these styles is automatically included in the contents.

## Manoeuvres

1. Open **Topperville Hall**. This document has already been formatted with **Heading** styles.
2. Place the cursor on the blank line below the title, press <Enter>, type **Contents** and press <Enter> again.
3. Place the cursor on the blank line below **Contents** and select **Insert | Reference | Index and Tables** and the **Table of Contents** tab.



*If the **Table of Contents** is being created from newly created styles, rather than existing styles, click the **Options** button to specify the order of styles being used. From **Available styles**, remove the level numbers and insert the correct number next to the style. To check that the table shows the correct styles at the correct level, look at the **Preview** before clicking **OK**.*

4. To see different formats, choose each type in turn from the **Formats** drop down list. The preview shows the effects.
5. Select **Formal**, then click **OK** to create a table of contents.

<u>History of Topperville Hall</u>	
<b>Contents</b>	
INTRODUCTION .....	1
THE HOUSE .....	1
GUIDED TOUR .....	1
<i>Museum of Childhood</i> .....	1
THE GARDENS .....	2
<i>Hidden Secrets</i> .....	2
<i>The Fountain</i> .....	3
<i>The Maze</i> .....	3
PETS' CORNER .....	3
GIFT SHOP .....	3
TEA ROOM .....	4
OPENING TIMES .....	4

6. Save the document as **Contents** and leave it open.

## Driving Lesson 39 - Updating a Table of Contents

### **P** Park and Read

Once a table of contents has been created, it is an easy matter to update it if any changes are made to the contents themselves.

### Manoeuvres

1. The **Contents** document should still be open. If not, open it.
2. To check that the page numbers are correct, hold down <Ctrl> and click on a page number 3 across from **The Maze** in the table of contents. The cursor moves to the relevant place in the document.
3. Insert a **Page Break** before **Introduction** (<Ctrl Enter>). The page numbers in the contents are now incorrect.
4. To update the table of contents, place the cursor within it and press <F9>.



*If difficulty is encountered when positioning the cursor, use the cursor keys.*



5. When the **Update Table of Contents** dialog box appears, select the **Update page numbers only** option. Click **OK**.
6. Check the page numbers - they should now be correct.



*Tables can be automatically updated prior to printing by setting the **Update Fields** option in **Tools | Options | Print**.*

7. Save the document as **Contents** and then close it.

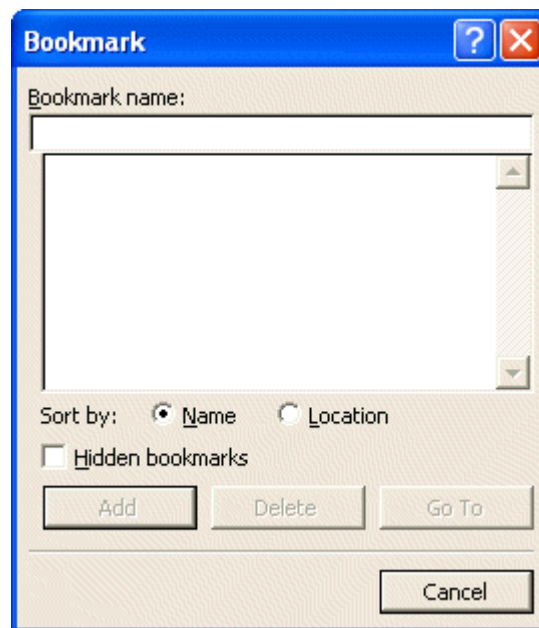
# Driving Lesson 40 - Adding and Deleting Bookmarks

## Park and Read

A **bookmark** can be assigned to a text position or to a graphic within a document. Once a place within a document has been given a bookmark, there are various methods to locate it quickly and easily. This can be a very useful feature in a large, complex document.

## Manoeuvres

1. Open the file **Predators** and position the cursor on page 2, at the beginning of the **Senses** heading.
2. From the menu select **Insert | Bookmark**.



3. Enter **Senses** as the **Bookmark name**.



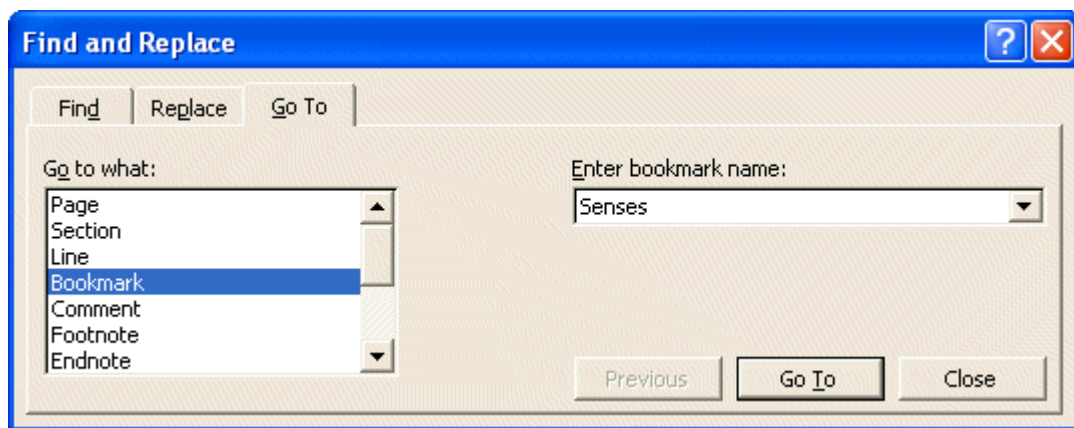
*A bookmark name cannot contain spaces.*

4. Click **Add** to create the bookmark.
5. Create a second, appropriately named bookmark for the **Conclusion** on page 3.
6. Insert a graphic of a shark from **Clip Art** after the **Diet** paragraph.
7. Select the graphic, then select **Insert | Bookmark**.



## Driving Lesson 40 - Continued

8. Enter **sharkpic** as the **Bookmark name** and then click **Add**.
9. Select the first sentence of the **Teeth** paragraph and insert a bookmark named **toothache**.
10. Move the cursor to the beginning of the document.
11. Select **Edit | Go To** to display the **Find and Replace** dialog box.
12. Select **Bookmark** from the **Go to what** box and the **Senses** bookmark from the bookmark name list.



13. Click the **Go To** button to go to the **Senses** section. You may need to move the dialog box to see the result.
14. In the same way, use bookmarks to move to the other bookmarked text and the graphic.
15. Close the **Find and Replace** dialog box.
16. To delete the **Senses** bookmark, select **Insert | Bookmark**.
17. Select the **Senses** bookmark from the list.
18. Click the **Delete** button, then click **Close**.
19. Close the document without saving.

# Driving Lesson 41 - Cross-Referencing

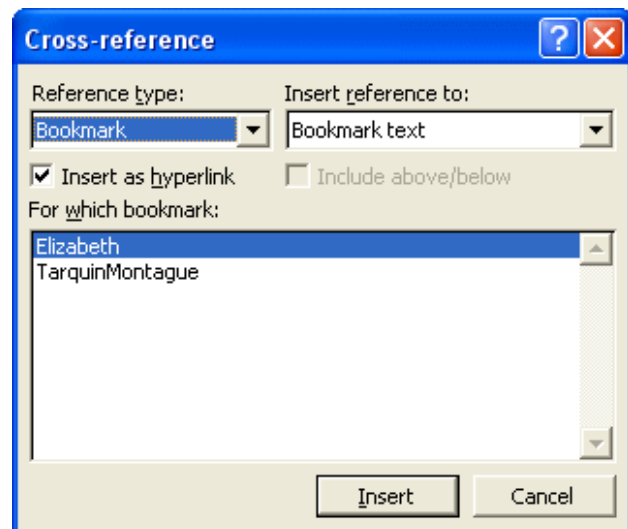
## Park and Read

**Cross-referencing** is a method of placing a reference in a document, which refers to an item elsewhere in a document, such as a **heading**, **bookmark**, **caption**, etc. When a cross-reference is created there are a variety of options for the reference text, including page number, heading text, bookmark text, etc. If the cross reference is defined as a hyperlink, pressing <Ctrl> and clicking on it will take you directly to the target location.

## Manoeuvres

1. Open **References**. Various types of reference are to be created.
2. Position the cursor after **Elizabeth I** in paragraph 1. Type **(Page** .

3. Select **Insert | Reference | Cross-reference**. From **Reference type** choose **Bookmark**. A list of all the bookmarks can now be seen.



4. From **Insert reference to** select **Page number** and **For which bookmark** highlight **Elizabeth**.
5. Make sure **Insert as hyperlink** is checked, so that a dynamic link between the reference and the referenced text will be created and click on **Insert** to create the cross-reference. Click **Close**.

6. Next to **(Page** the number **2** appears. Enter **)** after the number 2.
7. Position the mouse pointer over the cross-reference page number, which has just been inserted - a caption appears, because the cross-reference was inserted as a hyperlink. If the caption does not appear, select **Tools | Options | View** and check **ScreenTips**, then click **OK**.

Elizabeth  
CTRL + click to follow link

8. Hold down <Ctrl> and click once to move to the associated paragraph.

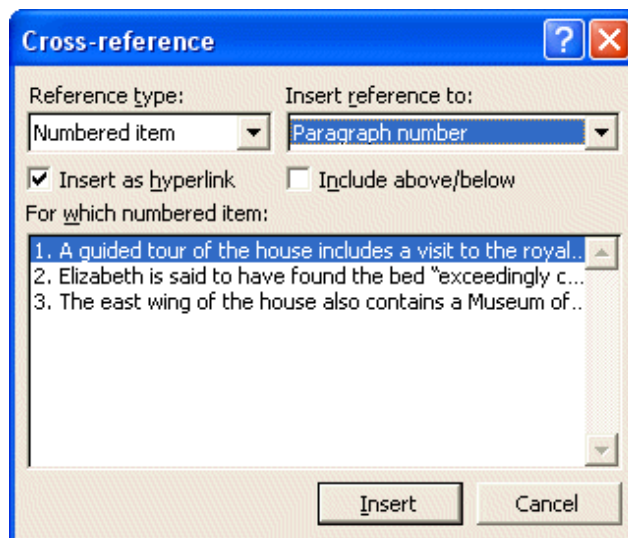


After moving to a cross-reference, the **Back** button, , on the **Web** toolbar can be used to move back to the previous position in the document.



## Driving Lesson 41 - Continued

9. On page 1, place the cursor in the list after **The House**. Again type **(Page** and display the **Cross-reference** dialog box.
10. This time select **Heading** as the **Reference type** and insert the reference to **Page number**. Select the heading **The House**, click **Insert** and **Close**.
11. Complete the reference with a closing bracket **)**.
12. Create references like this for the remaining items in the list.
13. On page 1, place the cursor at the end of paragraph 1 and type **See further info in paragraph number** .
14. Insert a cross reference to a **Numbered item**, in **Insert reference to a Paragraph number** and to go to item 1 in the list.



15. Click **Insert**, close the **Cross-reference** dialog box and complete the sentence with a full stop.
16. After the list, type **See opening times, page** and insert a cross reference to a **Table**, reference to **Page number** and choose the caption **Table 1**. Click **Insert**.
17. Move to page 2. Place the cursor after **from the tower** in the last paragraph, add a space and insert a cross reference.
18. Choose **Figure** as the **Reference type**, insert the reference to **Entire caption** and choose the caption **Figure 2**.
19. Try out the cross references.
20. Save the document as **Crossref** and leave it open.



*To delete a cross-reference the field codes must be viewed. Select **Tools / Options** and the **View** tab. Check the **Field codes** box and click **OK**. Position the cursor in front of the cross reference to be deleted and press **<Delete>** twice. Remember to turn the field codes off after deleting the cross-reference.*

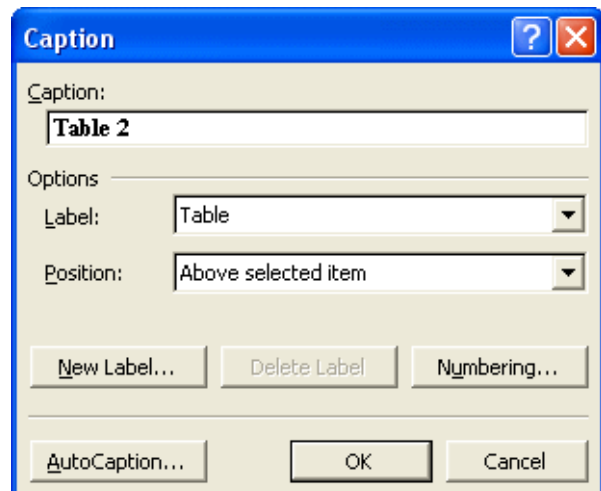
# Driving Lesson 42 - Adding Numbered Captions

## Park and Read

**Captions** can be added individually to objects such as graphs, images and tables. They can also be set up to be automatically applied, so that when a graph, etc., is inserted, it is automatically numbered. Once captions have been entered in this way a **table of figures/captions** can also be created.

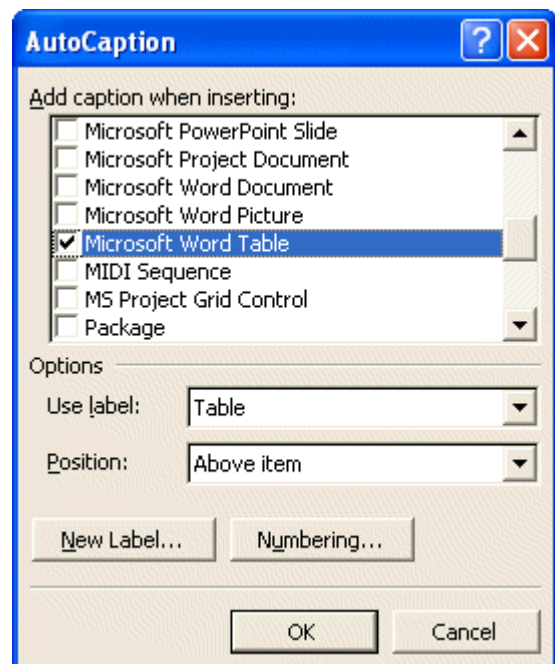
## Manoeuvres

1. With **Crossref** still open from the previous lesson, move to the end of the document and press <Enter> to create a blank line.
2. Insert a 3 x 3 table and select it.
3. Select **Insert | Reference | Caption**. From **Label** choose **Table**. The caption can be positioned above or below the item. Select **Above selected item** in the **Position** box.
4. Click **OK**. The caption **Table 2** appears because **Table 1** already exists and is placed above the table.
5. Scroll up the document and position the cursor above the **Pets' Corner** paragraph and insert another 3 x 3 table.
6. Keeping the cursor within the table, select **Insert | Reference | Caption**, ensure **Label** shows **Table**.
7. To change the caption text, enter **Events timetable** after the existing text in **Caption**. Click **OK**. The caption **Table 1 Events timetable** appears.
8. Scroll down to the other tables and notice they have been renumbered.
9. The figures in the document all have captions except the one in the **Pets Corner** paragraph. Click on this figure and select **Insert | Reference | Caption**.
10. Click the **Label** drop down, the available options are; **Equation**, **Figure** and **Table**. **Figure** is selected initially as the other captions are figures in the document. Select **Figure**.



## Driving Lesson 42 - Continued

11. Another label is required, click the **New Label** button, enter **Image** and click **OK**.
12. Click **OK** to add the new caption label to the figures.
13. To delete a caption label, select the **Image 3** caption, display the **Caption** dialog box, with **Image** displayed click the **Delete Label** button. The label is deleted and the caption reverts back to **Figure**. Set the position to **Below selected item**.
14. Click **OK**. The figure becomes **Figure 3** and all subsequent figures are renumbered accordingly.
15. To change the caption format, select any figure, select **Insert | Reference | Caption**, and click the **Numbering** button.
16. In the **Caption Numbering** dialog box, drop down the **Format** options and select **A,B,C, ...**.
17. Click **OK**, then click **OK** again to close the **Caption** dialog box. All figure captions are changed.
18. **AutoCaptions** make it possible to automatically insert a caption relating to an object as soon as it is inserted into a document. Select **Insert | Reference | Caption** then **AutoCaption**.
19. Scroll down the list and check **Microsoft Word Table**.
20. Click **OK** and insert a table anywhere in the document. Notice that a caption has automatically been created for it.
21. Apart from the table showing opening times, delete the other tables and captions. Ensure that the document still has only 4 pages.
22. The remaining table has not been renumbered and so has the wrong caption number. To update it, select the caption and press **<F9>**.



*If more than one table, figure, etc. needs renumbering, select the whole document and press **<F9>**. All captions in the document will be renumbered.*

23. Save the document and leave it open.

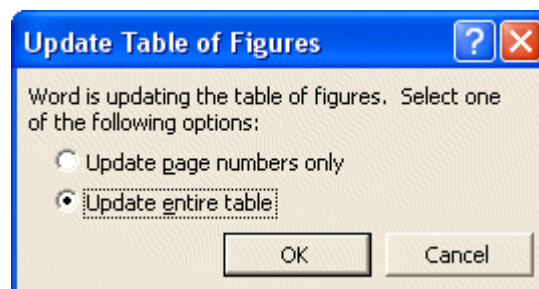
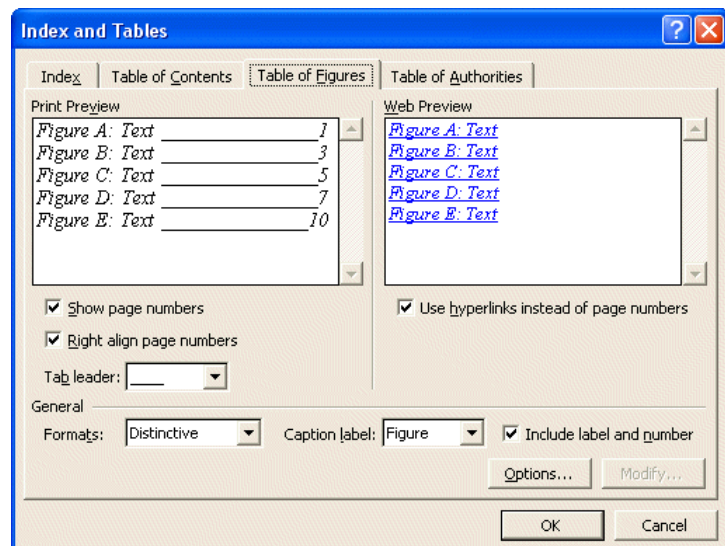
# Driving Lesson 43 - Creating a Table of Figures

## Park and Read

A table of figures is a list of the captions for pictures, charts, graphs, slides, or other illustrations in a document, along with the page numbers where they appear.

## Manoeuvres

1. Use the **Crossref** document for this exercise.
2. Place the cursor on page 1, beneath the list and the opening times reference.
3. Change the font to **Arial 12pt** bold, not italic, type **Table of Figures** and press <Enter>.
4. Select **Insert** | **Reference** | **Index and Tables** and the **Table of Figures** tab. Select **Distinctive** from **Formats** and ensure **Figure** is selected in **Caption label**.
5. Click **OK**.
6. Use <Ctrl> and click to test the links.
7. Remove the caption from **Figure B**.
8. To renumber the remaining figures press <Ctrl A> then press <F9>.
9. To update the table, place the cursor in front of **Figure A** of the **Table of Figures**.
10. Press <F9> and select **Update entire table**.



11. Click **OK**. Save the changes to the document and leave it open.

## Driving Lesson 44 - Creating Index Entries

### Park and Read

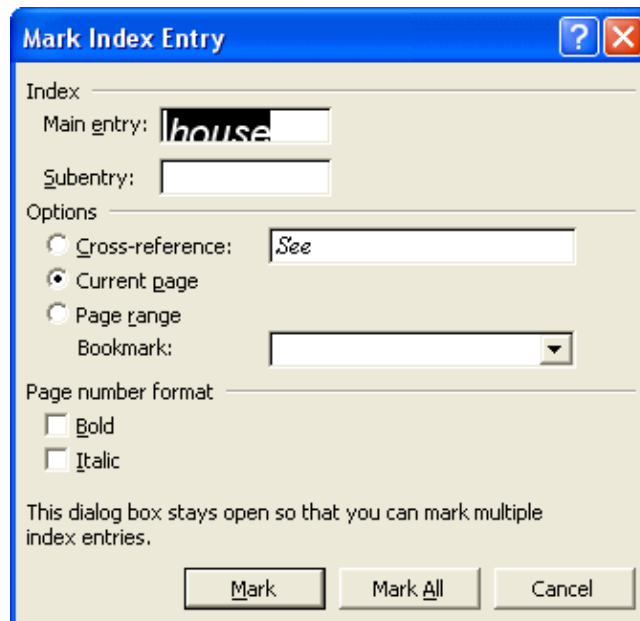
An **index** shows the position of selected words or phrases in a document. Text required for inclusion in the index must be specifically marked before the index can be created.

Once styles and captions have been created in a document and cross-referencing and index entries have been marked, it is a simple process to create tables for the entries.



### Manoeuvres

1. Use **Crossref**. Highlight the first occurrence of the word **house** in the first paragraph.
2. Select **Insert | Reference | Index and Tables**. Make sure the **Index** tab is selected.
3. Click on **Mark Entry** to display the **Mark Index Entry** dialog box. Ensure **Current page** is selected from **Options**.





To mark an index entry quickly, select the text and press **<Alt Shift X>**.



Indexes can also be marked by entering all the words to be indexed in a separate document. Save the document and from the **Index** tab, select **AutoMark**. Select the created file and Word will automatically index every occurrence of the word(s).



## Driving Lesson 44 - Continued


- Click **Mark All** to create an index entry for the first occurrence of **house** in each paragraph. The index entry is shown as a field, beginning with **XE**. Click the **Show/Hide** button, , if necessary to view the index entries.

year. The house XE "house" is at Elizabethan architecture in the



Indexes are case sensitive: **House** is not the same as **house**.

- Click **Close** to remove the dialog box. Scroll through the document. An index mark appears next to every occurrence of **house**.
- Go to paragraph 2 on page 1 and highlight the word **gardens**.
- Press <**Shift Alt X**> to view the **Mark Index Entry** dialog box.
- Click **Mark All** and **Close** the dialog box.
- Scroll down the document and create index entries for: **Elizabeth**, **tower**, **Pets' Corner**, **shop** and **tea room** (do not use the entries in the Table of figures or the paragraph titles).
- On page 3 highlight the word **maze** and press <**Shift Alt X**>.
- In the **Mark Index Entry** dialog box, type **gardens** as the **Main entry** and **maze** as the **Subentry**.
 

Index	
Main entry:	gardens
Subentry:	maze
- Save the document as **Index**.
- To create the index, insert a page break at the end of the document and type **Index** on the new page. Format **Index** as **Heading 1**.
- On a new line below this heading select **Insert | Reference | Index and Tables** and the **Index** tab.
- Set **Columns** to **1** and select the **Fancy** format. Click **OK** to create an **Index table**. Notice how **maze** is shown as a subentry of **gardens**.
- Move to the first index entry **tea rooms** and if you don't see the **XE** fields, click **Show/Hide**, .
- To edit the index entry, change the text inside the quotation marks to **cafe**.
- Select the index entry for **tower** in the text, select the entire field including the brackets { }, and then press <**Delete**>.
- To update the index to show the edited entries, click anywhere in the table and press <**F9**>.
- Close the document, saving the changes.

## Driving Lesson 45 - Revision: Referencing

This is not an ECDL test. Testing may only be carried out through certified ECDL test centres. This covers the features introduced in this section. Try not to refer to the preceding Driving Lessons while completing it.

1. Open the document **Aurora Formatted**.
2. Create endnotes in the **i,ii,iii** style for the following areas:
  - Greenland** page 1 paragraph 2 – **said by many to be the best place to view the lights**.
  - Eskimos** page 2 – **native Inuit people**.
3. Move the insertion point back into the document. Amend the second endnote, adding the text **to give them their proper name**.
4. Save the document as **Aurora Formatted2** and close it.
5. Open **Stately Home Headings** and at the top of the document, create a table of contents based on the currently formatted headings.
6. Insert a page break before **The Gardens** on page 1. Now update the table of contents.
7. Create an index at the end of the document, using all headings as index marks.
8. Save the document as **Stately Home3** and close it.
9. Open the document **Predators** and create a bookmark for each heading in bold print.
10. Create an additional bookmark to the text **The grey nurse shark** in the **Methods of Reproduction** paragraph.
11. Insert a cross-reference from the first sentence of the **Diet** paragraph to the **The grey nurse shark** bookmark text.
12. Set up **Microsoft Word Picture** automatic captioning.
13. Insert an appropriate graphic from **Clip Art** after the **Teeth** section and a second graphic after the **Sight** paragraph.
14. Create a table of figures at the front of the document.
15. Save the document as **Jaws** and close it.

If you experienced any difficulty completing this Revision refer back to the Driving Lessons in this section. Then redo the Revision.

Once you are confident with the features, complete the Record of Achievement Matrix referring to the section at the end of the guide. Only when competent move on to the next Section.