

Reference Tables and Tools

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Reference tables in Microsoft Word have long been more flexible and easier to use than they might seem at first glance. In this article, explore tools, tips, and shortcuts for creating and customizing reference tables including tables of contents, tables of figures, indexes, and bibliographies.

For Mac Users

Keep in mind that most reference tables and tools are primarily for use with the documents you create in Print Layout view. Features such as automatic tables of contents and footnotes are not available in Publishing Layout view.

Editing Reference Fields

Nowhere in Word is the ability to directly edit field codes more important than when working with reference fields.

See Also If you're not already familiar with editing field codes directly, see Chapter 12, "Dynamic Content" before continuing here.

Reference fields such as TOC and INDEX offer many more customization options than are available through their respective dialog boxes. And, editing table entry fields on screen can save tremendous time over working with the Mark <Feature> Entry dialog boxes. Many of the instructions provided in this article are for editing field codes directly either because it is the only way to accomplish the task, or because it is the faster method.

Remember that, if you don't know if the customization you need for a field is available, or you're not sure of the syntax, you can get that information from the Field dialog box. In Microsoft Word 2010, access this dialog box on the Insert tab, in the Text Group, under Quick Parts. Or, right-click a field and then select Edit Field. In Microsoft Word for Mac 2011, on the Insert menu, click Field.

Remember the following commands for working with field codes:

Command	Action
Ctrl+F9 (Command+F9 in Word 2011)	Converts selected text to a field. Or, if no text is selected, inserts empty field braces. To become a valid field, the selected text must include a field name and any required syntax for that field. As needed, field switches and other customization can also be included. This command is only available as a keyboard shortcut.
F9	Updates selected fields. This option is also available when you right-click a field. Note that, to display the field result, it's often necessary to update the field after converting text to a field. Additionally, you can update specific reference field types from relevant groups on the References tab (Document Elements tab in Word 2011), or from the content control headings for tables of contents and bibliographies.
Ctrl+Shift+F9 (Command+Shift+F9 in Word 2011)	Removes the selected field code and leaves only its result. Note that this shortcut does not work with table entry fields, because their result is not displayed in the same field. This command is only available as a keyboard shortcut, except when working with LINK fields, as discussed in Chapter 10, "Managing Graphics."
Shift+F9	Toggles the selected field between its code and its result. This command is also available from the shortcut menu that appears when you right-click a field. When working with reference tables that contain hyperlinks, use Alt+F9 (discussed in the next row of this table), instead, to easily access the reference table field code instead of the field codes for individual entry hyperlinks.
Alt+F9	Toggles all fields between their codes and results. This command toggles the setting Show Field Codes Instead Of Their Values, available on the Advanced tab of the Word Options dialog box. (In word 2011, this command is Show Field Codes on the Show tab of the Word Preferences dialog box.) The setting you enable when using this

Command	Action
command applies to all documents you open until you toggle the command again.	

My favorite thing about working with reference field codes is that they give you the ability to customize so much that you might not expect. For example, do you want to preserve line breaks in headings that appear in the table of contents? Just add the \x switch. If that detail is addressed, there's a good chance the one you need is as well. The Field dialog box in Word 2010 shows 16 switches for the TOC field, 15 for the INDEX field, and 8 switches plus formatting options for the REF (cross-reference) field. Many of the most commonly used switches for these fields are addressed as this article progresses.

For Mac Users

Most but not all of the same switches are available for reference field codes in Word 2011. But in some cases, it might just seem like the switch is not available.

For example, the \h (hyperlink) switch doesn't appear in the Field dialog box options for the TOC field code, but you can use that switch. In fact, it's included with the built-in automatic tables of contents on the Document Elements tab.

Note that, if you use the hyperlink switch in a TOC field and the hyperlinks don't appear to work, just point to the page number. As of this writing, in Word 2011, the hyperlink switch adds a hyperlink only to the page number in the TOC, not the entire TOC entry line. (This is different from Word 2010, where the hyperlink is added to the entire entry line. So, if you edit a document that was created in Word 2010, you might see that behavior in the TOC.)

Suppress text associated with paragraph numbers in cross-references

Cross-references offer a great example of how easy it can be to customize field codes.

On a number of occasions, I've run into documents where many cross-references to paragraph numbers were required, but the owner of the document didn't want the cross-references to include the text associated with the paragraph number (such as words like *Article*, *Section*, or *Appendix*).

The cross reference (REF) field offers a \t switch that suppresses all non-delimiter characters. So, for example, if you have a cross-reference to *Article I* and add the \t switch, the reference will appear just as *I*.

So, what do you do when you have hundreds of cross-references throughout the document that need the same switch? Use the Replace feature. When you toggle all fields to display field codes (Alt+F9), the Replace feature will search field code content as text.

A cross-reference to a paragraph number uses either the \r, \n, or \w switch (depending upon which paragraph number style you use). So, you can simply search for instances of the applicable paragraph number switch and replace it with that same switch plus the \t switch (remember to type a space between the two switches in the Replace box). Then, select the entire document (Ctrl+A in Word 2010 or Command+A in Word 2011), press F9 to update all selected fields, and then press Alt+F9 again to display field results.

Managing Tables of Contents

When you insert one of the built-in tables of contents from the Table Of Contents building block gallery, you get a table of contents built from text formatted with the first three outline levels. Keep in mind that this includes both the built-in heading styles Heading 1 through Heading 3, and any other paragraphs formatted to levels one through three using the Outline Level paragraph formatting options available in the Paragraph dialog box, as shown here.

You can open the Table Of Contents dialog box to edit the options for what content is used to generate your table of contents, or edit the field code directly. To access the dialog box, on the References tab, click Table Of Contents and then click Insert Table Of Contents. (In Word 2011, on the Document Elements tab, in the Table Of Contents group, click Options.)

Benefits of Using Table of Contents Building Blocks

Although you can go directly to the Table Of Contents dialog box to insert your table of contents instead of using the building block options (called document elements in Word 2011), remember that you can customize table of contents building block entries and (in Word 2010) save your customizations to the Table Of Contents gallery. The benefits offered by using building block entries, including the ability to swap designs or update the table of contents directly from the content control, make it worthwhile to start with the building block options rather than trying to circumvent them. For that matter, you can simply create a TOC field on screen as well, but editing the field inside the content control gives you the same flexibility without losing any functionality.

Additionally, in Word 2010, when you need to remove a table of contents from the document, use the Remove Table Of Contents option at the bottom of the Table Of Contents gallery (whether or not you inserted your table of contents using building

blocks). This option removes the TOC field, the content control (if applicable), and all hidden bookmarks added by the table of contents. The fact that this option removes hidden bookmarks resolves a longstanding issue, because hidden bookmarks left behind by deleted tables of contents can become a source of document instability if the number of bookmarks becomes excessive.

To view the hidden bookmarks added to your document by a table of contents, on the Insert tab (Insert menu in Word 2011), click Bookmarks and then select the Hidden Bookmarks check box. Note that you may need to turn off the Hidden Bookmarks option and then turn it on again to reveal the bookmarks. Hidden bookmarks added by your table of contents begin with the characters "_Toc."

Editing the field code can be faster and gives you more flexibility than using the dialog box.

The following list explains how to edit the field code for some common customizations:

- To generate the table of contents from Heading styles but not other text formatted with Outline Level formatting, delete the \u switch from the default TOC field code.
- To generate the table of contents from table entry fields (TC entries) instead of outline levels or styles, add the \f switch and delete both the \u switch and the \o switch (along with the "1-3" level indicators that follow the \o switch by default).
- To specify additional styles from which to generate the table of contents, add the \t switch, followed by the style name and level number, each separated by commas and all contained inside a single set of quotation marks. The example field code shown here is for a table of contents generated from heading styles Heading 1 through Heading 3, along with level one entries from a style named Page Heading and level three entries from a style named Table Heading.

`{TOC\o"1-3\"u\t\"PageHeading,1,TableHeading,3\"}`

Note After you add, edit, or delete any content from a field code, remember to press F9 to update the result.

When Table of Contents or Index Formatting Changes Unexpectedly

If you apply direct formatting to an entry in your table of contents or index and other entries change as well, that's because the paragraph styles used in table of contents and indexes are all set, by default, to update automatically.

So, for example, if you select a first-level entry in a table of contents and format it to be bold, all other entries on the same level will become bold as well, because TOC 1 paragraph style uses the Automatically Update setting.

You can disable Automatically Update through the Modify Style dialog box. Do this through any Modify Styles access point (such as the Styles pane). Or, to access this dialog box specifically for TOC or Index styles, in the Table Of Contents or Index dialog box, click the Modify button.

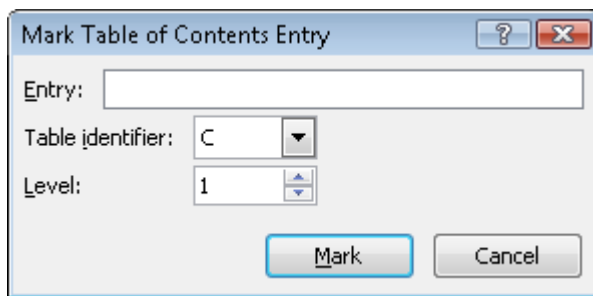
Using TC Entry Fields

When you need to generate a table of contents from pieces of text that comprise just part of a paragraph—such as run-in headings—the most reliable way to accomplish this is with TC entry fields. You can create these field codes directly, but this is one case where the dialog box might save you time.

Reference Tables and Tools

The Mark Table Of Contents Entry dialog box is only available through the keyboard shortcut Alt+Shift+O (Command+Alt+Shift+O in Word 2011). Or, you can add the command to your Quick Access Toolbar in Word 2010 or any toolbar in Word 2011.

One of the nicest things about the dialog box shown here is that it's modeless, meaning that you can click between the dialog box and the document as much as you need without closing the dialog box.



If you select the text to appear in the table of contents before you open or click in the dialog box, the Entry text box will automatically populate with your selected text. Then, just select the table of contents level and click Mark.

Note that you only need to specify a Table Identifier when you need multiple tables of contents in the same document. Learn how to work with this option later in this article.

The significant drawback to using TC entry fields is that automatic paragraph numbers don't get included with entries. See the tip that follows for an alternative option for when you need to include paragraph numbers for run-in headings in your table of contents.

Using Linked Styles Instead of TC Entry Fields

Note This tip applies only to Word 2010.

If you need to generate a table of contents from run-in headings but don't want to use TC entry fields, is there a good alternative? Style Separators were popular for many years, but have only been available in Word for Windows as a custom command (such as to add to your Quick Access Toolbar) since Word 2007. The retreat into obscurity is a good thing for this feature—style separators have more than their share of issues. But there is a simple alternative.

Linked styles can sometimes provide an easy option in Word 2010 for creating tables of contents from run-in headings. (For information on linked styles, see Chapter 8, "Styles.") Note that, like the style separator before them, linked styles used to generate a TOC from run-in headings do include automatic paragraph numbers for those headings when added to the table of contents.

To generate a table of contents from text formatted with linked styles, do the following:

1. Create a linked style for each level of your table of contents that will be generated from run-in headings. Include any font formatting in your linked style that's unique to the heading portion of the run-in heading paragraph.
2. In the TOC field code, add the \t switch discussed earlier, along with the styles names created in the preceding step and the level number you want to assign to each linked style.
3. Apply the linked styles to the run-in headings where needed throughout the document. Be sure to select only the heading portion of the run-in heading

paragraph before applying your style. The text to which you apply the linked style will be the text that appears in your table of contents.

Note that, although you technically were able to use this method in earlier versions of Word, it was not a particularly clean workaround, because linked styles weren't explicitly visible. The reason linked styles works for this task is that you can only specify paragraph styles in the TOC field code, and you can apply character styles to just part of a paragraph. Linked styles are both paragraph and character styles by design, so you can apply them to your run-in headings and include them in the table of contents.

However, keep in mind that this technique only works with run-in headings and not any text to which a linked style is applied. That is, if the first typed character in the paragraph isn't included in your selection, the entry won't appear in the table of contents.

Creating Multiple Tables of Contents in One Document

Although many formatting customization options are available for tables of contents, most TOC field options relate to specifying which document content is used to generate the table of contents. Some of these options have already been addressed in this article; those that have not yet been introduced are options to use when you need to create more than one table of contents in a single document. These are as follows.

- Use the \f (Table Identifier) switch with TC entry fields to assign specified entries to a specific table of contents.
- Use the \l (Level) switch with TC entry fields to generate separate tables of contents for different levels of entries.

- Use the bookmark switch to generate a table of contents for just a portion of the document at a time.
- Generate tables of contents from different specified styles.

Caution! With any of the options provided here, keep in mind that adding a particular switch might not be all you need to do to get the desired result. You might also need to delete switches that add content you don't want. For example, if generating a table of contents only from TC entry fields that use a specific table identifier, be sure that the \o, \u, or \t switches are not included, or you might get other content in your table of contents as well. When editing any field code directly, it's important to understand all the existing switches that appear in the field code as well as those you choose to add.

Using the Table Identifier Switch

When you generate a table of contents from TC entry fields, you can specify a Table Identifier, mentioned earlier. This option is inserted into the TC entry field as the \f switch, followed by an identifying letter. To generate a table of contents from just those entries labeled with a specific Table Identifier, add the same \f switch, with the same identifying letter, to the TOC field code. For example, if you have a TC entry field that uses E as its identifier, as you see here,

```
{TC "SampleEntry" \f E \l "1" }
```

use the same identifier in the TOC field code to generate a table of contents only from TC entries that have the E identifier, like so:

```
{TOC \f E }
```

Using the Level Switch

Like the Table Identifier switch, the Level switch only affects tables of contents generated from TC entry fields. Each TC entry field contains a Level switch, indicating the level of the table of contents on which the entry needs to appear. To generate a table of contents for just TC entry fields that specify a given level, add that same Level switch to the TOC field.

Using Bookmarks

To generate a table of contents from just a portion of the document, first add a bookmark around the desired portion of the document. Then, add the \b switch, along with the bookmark name in quotation marks, to the TOC field. In the example shown here, part of the document is contained within a bookmark named Sample. The table of contents will be generated from only content within that bookmark.

```
{TOC\b."Sample"}
```

This is a particularly nice option because it enables you to generate multiple tables of contents in a document, but still use any available content option (such as outline levels or styles) for generating each table of contents.

Using Specified Styles

As discussed earlier, the \t switch enables you to include styled text in your table of contents other than text formatted with built-in heading styles or Outline Level formatting. Remember to delete the \o and \u switches to avoid using those built-in heading and outline options when you want to generate the table of contents only with styles specified using the \t switch.

Suppressing Page Numbers for Just Some Table of Contents Levels

One of the most commonly needed table of contents customizations, other than those for selecting the content used to generate the table, is the ability to suppress page numbers. Though you can use the Table Of Contents dialog box to do this for all levels, the only way to suppress page number for just some table of contents levels is through the field code.

To do this, use the \n switch. By itself, the \n switch suppresses numbers for all TOC entries. To specify levels, indicate the range to suppress as highest level through lowest level, just as when using the \o switch to specify which outline levels to include.

For example, to suppress page numbers for level three, but show them on any other levels, add \n "3-3" to your field code. To suppress page numbers for levels two through four, add \n "2-4" to your field code.

The TOC Field Doesn't Offer the Options I Need

If you've reviewed all available TOC field switches and still can't find the option you need, consider some possibly easy alternatives before you start typing that table of contents manually and spending your day searching for page numbers.

First of all, the table of contents you need is probably at least close to an available TOC field option. For example, do you need the table of contents to show page numbering in a format that's not possible with a TOC field? If so, generate the table of contents automatically to be as close as possible, then convert the field to text (Ctrl+Shift+F9) and make your remaining customizations.

Or, you can take that one step further and try using a macro either to generate the manual table of contents you need automatically whenever you need to update it, or to complete the automatic table of contents that you converted to text. Find an example of this that you can use and customize in the sample file named *Sample Macros.dotm*, available in the Chapter23 sample files folder as part of the online companion content for this book.

Creating a Table of Figures

A table of figures is actually just a TOC field with a unique switch. The \c switch indicates that the table is a table of figures, and it requires that you specify a caption label. For example, the field code for a table of figures generated for a set of objects labeled *Figure* looks like this:

```
{TOC\c"Figure"}
```

Because tables of figures use the TOC field code, some field options such as adding hyperlinks between entries and their referenced text, or suppressing page numbers, can be used in tables of figures as well.

AutoCaption Doesn't Work for My Equations

A table of figures is generated from sequence fields that are identified with a caption label. These labeled sequence fields are created and formatted automatically using the Insert Caption feature on the References tab (in Word 2011, this feature is on the Insert menu).

When you click Insert Caption, the Caption dialog box opens. In that dialog box, you can select AutoCaption, through which you can specify certain types of objects to be automatically captioned when created or inserted. Note that once you enable

AutoCaption for an object type, it remains on for all documents you edit until you disable the option.

The list of items available to AutoCaption can vary based on the programs installed on your computer. For example, Microsoft Visio Drawing Object will only appear in the list of AutoCaption options if Microsoft Visio is installed.

However, if you're accustomed to being able to use AutoCaption for equations and that no longer works, here's the reason. The AutoCaption equation option works with Microsoft Equation 3.0 (Microsoft Equation in Word 2011), which is the equation generating program used in previous versions of Word (and still available to legacy documents).

The equation-building functionality that you get on the Insert tab in Word 2010 and the Document Elements tab in Word 2011 is built-in functionality. It's greatly improved over the previous equation editing tools. However, this functionality doesn't work with AutoCaption.

Of course, you can still insert captions for your equations using the Caption dialog box. But there is also a pretty simple workaround to enable you to automatically caption them as well.

To do this, just insert a placeholder from the Equation gallery and add as much content or formatting to it as you want to apply to all of your equations. Then, add a caption to it. You can then add the combined equation and caption to your Equation gallery as a new entry. To do this, select both the equation and caption and then, at the bottom of the Equations gallery, click Save Selection to Equation Gallery (Save as New Equation in Word 2011).

When you create new equations from that gallery entry, they'll include the caption. Because the caption contains a sequence field, it will automatically number just as if AutoCaption had inserted it.

Working with Indexes

No matter what you've heard or experienced in the past, creating an index really doesn't need to consume the better part of your youth. Here's the secret: there are two efficient ways to mark entries for your index, and neither one relies solely on the Mark Index Entry dialog box.

Using Index Entry Fields

If you want to manually work through your document and mark entries as you find them, creating and editing field codes can help you save significant time and reduce errors. All you need to know is the correct syntax for index entry (XE) field codes.

An index can have up to nine levels. Where entry names are specified in the INDEX field, each level is separated by a colon. So, for example, an index entry in this book that provides information about the INDEX field code might be a third-level entry, like so:

```
Fields
  Reference
    Index..... 10
```

The XE field code for this reference would look like this:

```
{XE"Fields:Reference:Index"}
```

Entries often need to specify a page range instead of a page number. Do this by first bookmarking the text to reference and then adding the \r switch, along with the bookmark

name, to the XE field code. If you surround the text for the preceding entry with a bookmark named **testentry**, the XE field code to reference that bookmark for a page range will look like this:

```
{XE "Fields:Reference:Index" \r "testentry" }
```

To type a cross-reference to be used in place of page numbers for an entry, use the \t switch followed by the reference text, like so:

```
{XE "Fields:Reference:Index" \t "See Building Blocks" }
```

Note that switches for bold or italic formatting on specified entries (the \b and \i switches, respectively) are also common.

As mentioned earlier, many switches are available for the INDEX field code, but these are the most common. Once you understand this syntax, you can use your knowledge of this field code along with the Mark Index Entry dialog box, to save tremendous time when marking your document for an index.

Marking an Index

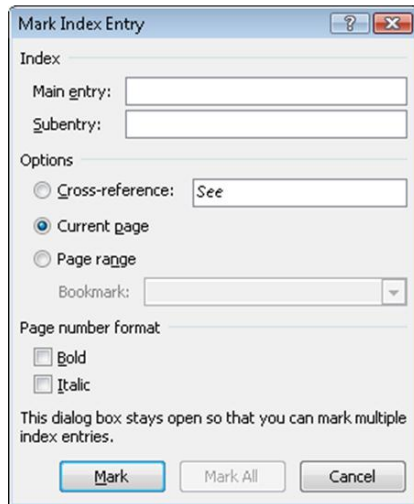
Start with the Mark Index Entry dialog box. To access this dialog box, on the References tab, in the Index group, click Mark Entry. Or, press Alt+Shift+X (Command+Alt+Shift+X in Word 2011).

The dialog box has the substantial benefit that it will mark all instances of an entry automatically. However, using the Mark All option assumes that the text you want to mark uses the same word(s) as the index entry. It also assumes that you've got great attention to detail, because index entries are very sensitive. That is, misspell a word or differ capitalization for your entry name, and you get a separate entry.

Reference Tables and Tools

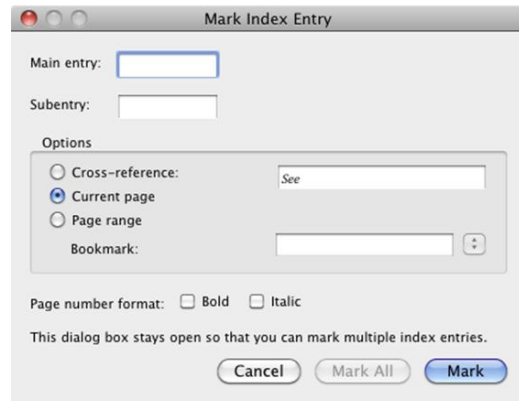
So, depending on your particular needs, you might want to create your XE fields directly, or insert an XE field through the Mark Index Entry dialog box and then copy and edit it as needed.

Word 2010



The screenshot shows the 'Mark Index Entry' dialog box in Word 2010. It has a title bar with a question mark and a close button. The 'Index' section contains 'Main entry:' and 'Subentry:' text boxes. The 'Options' section has three radio buttons: 'Cross-reference:' (with a text box containing 'See'), 'Current page' (selected), and 'Page range'. Below these is a 'Bookmark:' dropdown menu. The 'Page number format' section has checkboxes for 'Bold' and 'Italic'. At the bottom, there is a note: 'This dialog box stays open so that you can mark multiple index entries.' and three buttons: 'Mark', 'Mark All', and 'Cancel'.

Word 2011



The screenshot shows the 'Mark Index Entry' dialog box in Word 2011. It has a title bar with standard window controls. The 'Main entry:' and 'Subentry:' text boxes are at the top. The 'Options' section has three radio buttons: 'Cross-reference:' (with a text box containing 'See'), 'Current page' (selected), and 'Page range' (with a text box and a dropdown arrow). Below these is a 'Bookmark:' text box. The 'Page number format' section has checkboxes for 'Bold' and 'Italic'. At the bottom, there is a note: 'This dialog box stays open so that you can mark multiple index entries.' and three buttons: 'Cancel', 'Mark All', and 'Mark'.

When using the dialog box, shown here, keep a few things in mind:

- To mark entries with more than two levels, add all subsequent levels together in the Subentry box, each level separated by a colon.
- Selected document text will only populate the Main Entry box, not the Subentry. Be very careful when typing entry text, because entries are both spelling and case sensitive.
- To reference a range of pages, you must create the bookmark for the page range before it will be accessible in this dialog box.

Creating An Index from an AutoMark File

If you know the list of entries you want to appear in your index and you know what text needs to be marked to create that index, you don't need to use either the dialog box or create XE fields yourself. Just create an AutoMark file.

Note If you've searched Word help on the topic of indexes, you might also see the AutoMark option referred to as using a "concordance" file.

To create an AutoMark file, start with a blank Word document and insert a two-column table. Your table should not have headers and does not require formatting, but it must be a genuine Word table (as opposed to creating the appearance of a table with tabs or embedding a Microsoft Excel table).

- Use one row per each piece of text to be marked. If you're marking more than one piece of text for a given entry, create a separate row for each.
- Type the text to be marked in the left column and the entry name in the right column.
- To type entry names that include subentries, just add a colon between each level.

When you're ready to mark your index, save and close the AutoMark file. Note also that, if you later need to add entries, you can add them to the same AutoMark file and run the procedure that follows again without duplicating entries.

To mark your document using this file, in the document to be marked, do the following:

1. In Word 2010, on the References tab in the Index group, click Insert Index and then click AutoMark.

In Word 2011, on the Insert tab, click Index And Tables. On the Index tab of that dialog box, click AutoMark.

2. In the AutoMark dialog box, browse to your AutoMark file.
3. When you select the file you need, click Open. The destination document will automatically be marked with all entries from your AutoMark file.

Once your document is marked, go ahead and insert or update your index. Keep in mind that you can insert an index from the References tab or by creating an INDEX field directly. Either way, if you need additional customizations for your index, check out the available INDEX field switches before considering complicated workarounds.

Creating a Bibliography

The bibliography feature was just introduced in the previous versions of Word for Windows and Word for Mac, and it's a welcome addition to Word reference tools that works quite nicely.

You can save sources to be available to any document where you need to cite them, and you can add sources just for particular documents as well. In Word 2010, you can even generate a unique bibliography just for sources in a given language.

Creating and Managing Sources

To create a new source, do the following:

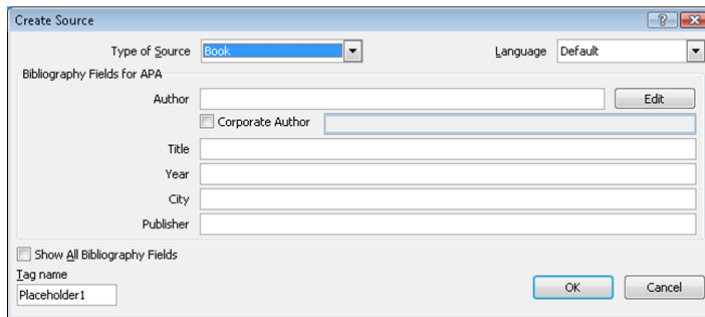
- In Word 2010, on the References tab, in the Citations & Bibliography group, click Insert Citation and then click Add New Source. Or, click Manages Sources and then click New.

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- In Word 2011, on the Document Elements tab, in the References group, click Manage to open the Citations tab of the toolbox. Or, on the View menu, under Toolbox, click Citations. Then click the plus sign at the bottom of the pane.

In the Create Source dialog box (Create New Source in Word 2011), complete the fields you want to include for your source. Note that you can add\edit information for a saved source at any time.

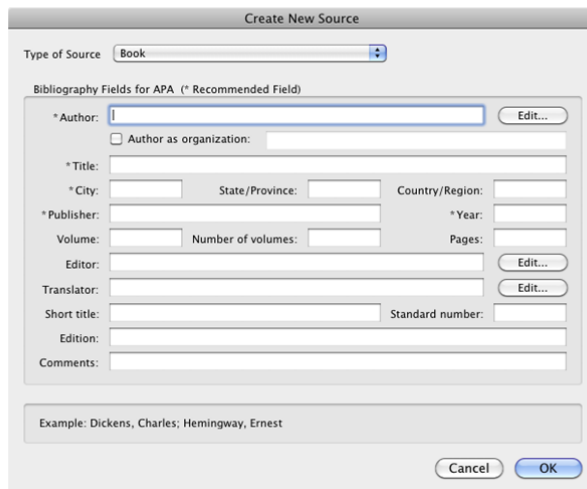
Word 2010



The 'Create Source' dialog box in Word 2010. It features a 'Type of Source' dropdown menu set to 'Book' and a 'Language' dropdown set to 'Default'. Under 'Bibliography Fields for APA', there are input fields for Author, Title, Year, City, and Publisher. An 'Edit...' button is next to the Author field. A checkbox for 'Corporate Author' is also present. At the bottom, there is a checkbox for 'Show All Bibliography Fields', a 'Tag name' field with 'Placeholder1' entered, and 'OK' and 'Cancel' buttons.

Note Notice that the Word 2010 dialog box shows only recommended fields by default. When you select the option Show All Bibliography Fields, you see the same fields as those shown here in the Word 2011 dialog box.

Word 2011



The 'Create New Source' dialog box in Word 2011. It has a 'Type of Source' dropdown set to 'Book'. The title 'Bibliography Fields for APA (* Recommended Field)' is displayed. The fields include: * Author (with an 'Edit...' button), * Title, * City, State/Province, Country/Region, * Publisher, * Year, Volume, Number of volumes, Pages, Editor (with an 'Edit...' button), Translator (with an 'Edit...' button), Short title, Standard number, Edition, and Comments. An example text 'Dickens, Charles; Hemingway, Ernest' is shown at the bottom. 'Cancel' and 'OK' buttons are at the bottom right.

Notice the Edit options for the *Author*, *Editor*, and *Translator* fields. This opens the Edit Name dialog box, where you can easily create a list of names. Finally, notice Tag Name at the bottom of the Word 2010 dialog box. This tag name is used in the CITATION field codes to uniquely identify the referenced source. (In Word 2011, the tag name is automatically generated.)

When you create a new source, it's automatically added to your master source list and available to your active document as well. In the Source Manager, you can copy sources between the master list and active document, as well as add, edit, or delete sources. In Word 2010, you can even add sources from a saved source list. Source lists are saved as XML files. To access the Source Manager:

- In Word 2010, on the References tab, in the Citations & Bibliography group, click Manage Sources.
- In Word 2011, on the Citations tab of the toolbox, click the gear icon at the bottom of the pane and then click Citation Source Manager.

Note Because source lists are saved as XML files, you can add or edit sources directly in the XML, and share source lists with others. Learn how to edit Office Open XML files in Chapter 24, "Office Open XML Essentials."

Working with Citations

Once a source is available to your active document, you can insert a citation to that source. To do this:

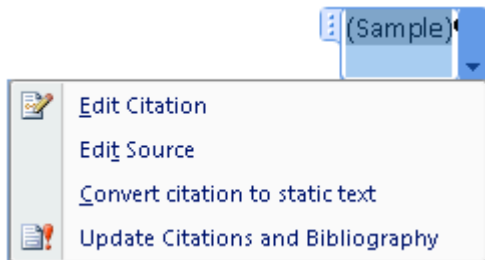
- In Word 2010, on the References tab, click Insert Citation and then click the source name to reference.
- In Word 2011, on the Citations tab of the toolbox, double-click the citation to insert.

Reference Tables and Tools

If the source name you need doesn't appear here, the source has not been made available to your active document. To make existing sources available to the active document, use the Source Manager introduced earlier to copy them from the master source list.

If you haven't yet added a source for the citation you need, Word 2010 gives you the option to use a placeholder. Under the Insert Citation options, click Add New Placeholder. This will enable you to add a new Tag Name, as mentioned earlier, for a source to be edited later.

When a citation is added to your document through the Insert Citation options, it's contained within a content control, which provides additional functionality. From the citation control, as shown here, you can edit the citation to specify pages or to suppress the author, year, or title in the citation. You can also edit the source or convert the citation to static text.



Caution! The keyboard shortcut Ctrl+Shift+F9 (Command+Shift+F9 in Word 2011) doesn't work to convert a citation to text. If you use this keyboard shortcut, the citation will be deleted. To remove the citation functionality and leave just the citation text, use the option provided in the content control.

Creating a Bibliography

Once you've inserted at least one citation in your document, you can generate a bibliography.

You can create the bibliography field directly and it's quite easy to do. The field code is named BIBLIOGRAPHY and contains no switches. However, you get additional options from the content control when you insert the bibliography from the gallery, including options to update citations and bibliography and to convert the bibliography to static text. (In Word 2010, you can also save your own customized bibliographies to the gallery.)

- To access the gallery in Word 2010, on the References tab, in the Citations & Bibliography group, click Bibliography.
- To access the gallery in Word 2011, on the Document Elements tab, in the References group, click Bibliography.

Once you insert a bibliography, notice in Word 2010 that the Bibliography gallery is also available from the heading of the content control that contains the bibliography.

Create a Unique Bibliography for Sources in a Specified Language

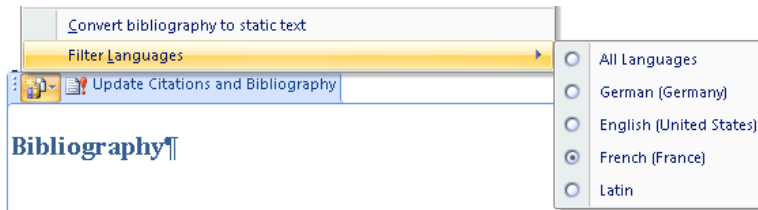
Note This tip applies only to Word 2010.

In Word 2010, if you have multiple languages enabled, you can assign any source to a specific language and then create separate bibliographies for sources in each language.

You can enable additional editing languages for use in Word 2010 on the Language tab of the Word Options dialog box. (Your changes take effect the next time you start Word and apply to all Office 2010 programs.)

To generate unique bibliographies for sources in different languages, start by assigning sources to the appropriate language. Once multiple languages are enabled, you'll find the Language option at the top-right of the Create Source or Edit Source dialog box.

After you insert a bibliography, click the content control heading and then click Filter Languages, as shown here.



Select a language from the list to show only sources specified as that language.