Kennesaw State University

University Information Technology Services

Microsoft Office Word 2013

Tools for your Research Paper

University Information Technology Services

Training, Outreach, Learning Technologies and Video Production

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University Information Technology Services

Microsoft Office Word 2013

Tools for your Research Paper

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Introduction

This booklet is the companion document to the Word 2013: Tools for your Research Paper workshop. The booklet will show users how to utilize the tools under the *References* tab in the Ribbon, such as inserting a table of contents, inserting citations and managing your saved citations from previous sessions, adding captions and footnotes/endnotes, and using cross-references.

Learning Objectives

After completing the instructions in this booklet, you will be able to:

- Insert and update your table of contents
- Add footnotes/endnotes to your document
- Add citations and placeholders
- Understand how to manage your citations and placeholders
- Insert and update a Bibliography
- Insert captions and using the cross-reference tool to create hyperlinks
- Inserting a table of figures

Reminder on Styles

A *Style* is a predefined combination of font style, color, and size that you can use to format the text in your document. Using styles can help you create documents that have a more professional, and consistent, appearance. The *Heading Styles* are important when using the *table of contents* tool.

Applying a Heading Style

The following explains how to apply a heading to your document:

1. Select the text that you want to format (e.g. chapter or section title).

2. On the *Home* tab, in the *Styles* group, click on the **Heading 1** style (See Figure 1).

Figure 1 - Heading Style 1

3. You can also access your styles from the *Quick Access Toolbar*. After selecting your text, the *Quick Access Toolbar* will appear. Click the **Styles** button on the right (See Figure 2).

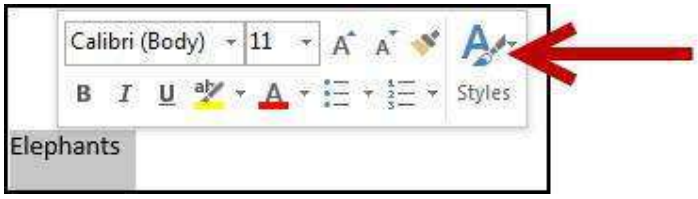

Figure 2 - Selecting Styles from the Quick Access Toolbar

Note: There are up to nine multilevel numbered *Heading Styles* available. Below is a sample of Headings 1-3 (See Figure 3).

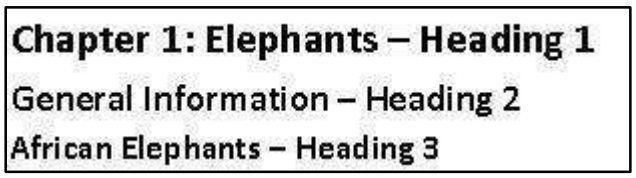

Figure 3 - Heading Styles

Note: For more information on using *Styles*, refer to the documentation *Word 2013: Formatting your Document* at https://uits.kennesaw.edu/cdoc.

Inserting a Table of Contents

Word provides a quick and easy way to create a *Table of Contents* page for your document; provided you have already applied the proper headings to the chapters/sections throughout your document (See Applying a Heading Style for more information). To add a table of contents to your document:

1. Click to **place your cursor** in the document where you want to place the *Table of Contents*.

2. In the *Ribbon,* click the **References** tab (See Figure 4).

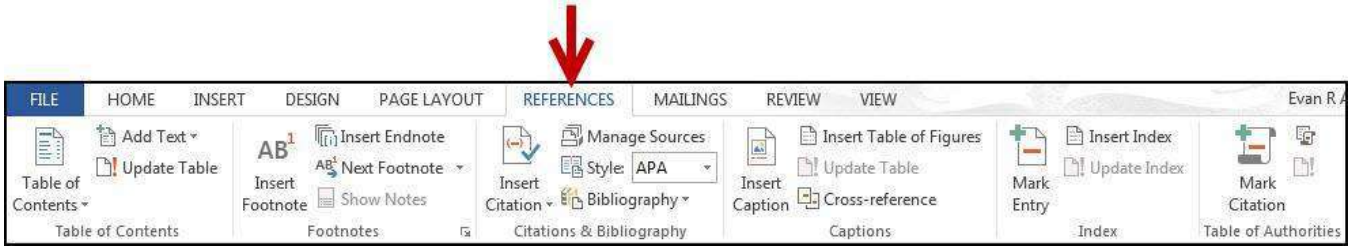

Figure 4 - References Tab

3. In the *Table of Contents* group, click on **Table of Contents** (See Figure 5).

Figure 5 - Table of Contents

4. A list of *content tables* will appear. Click on **Table of Contents** (See Figure 6).

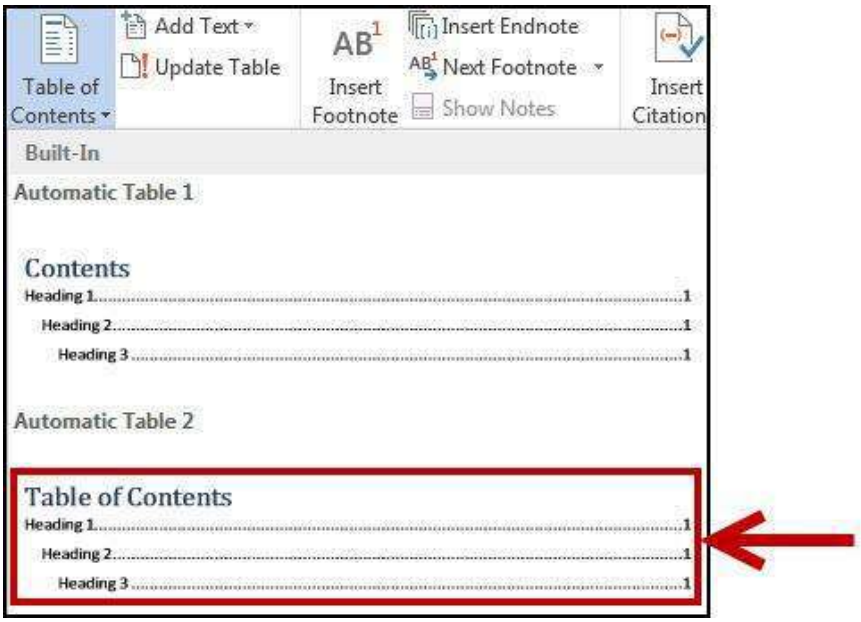

Figure 6 - Table of Contents List

5. Your *Table of Contents* will be inserted into the document (See Figure 7).

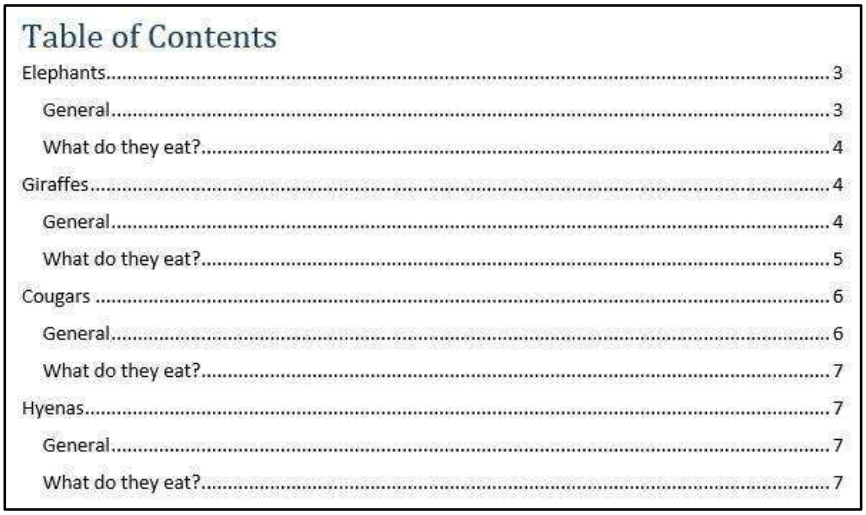

Figure 7 - Table of Contents Inserted

Updating the Table of Contents

If you make changes to the document after you have added the *Table of Contents*, you can update the table to reflect the new changes (e.g. additional sections added, or altered page numbers). The following explains how to do this:

1. Click on the **Table of Contents**. A tab with an *Update Table…* option will appear (See Figure 8).

Figure 8 - Update Table

2. Click on **Update Table…**.

3. The *Update Table of Contents* window will appear. Click on **Update entire table** (See Figure 9).

Figure 9 - Update Entire Table

4. Click on **OK**. Your *Table of Contents* will be updated.

Note: It is recommended to select *Update entire table,* as this option will update page numbers and any additional headings added to your document.

Footnotes and Endnotes

Footnotes and Endnotes provide referencing information for specific text in a document. Footnotes appear at the bottom of the page on which the reference mark appears. Endnotes appear at the end of a section or document.

Inserting a Footnote or Endnote

The following explains how to insert a footnote on a page.

1. Click in the document at the location where you want to insert your footnote.

2. In the *Ribbon,* click the **References** tab (See Figure 10).

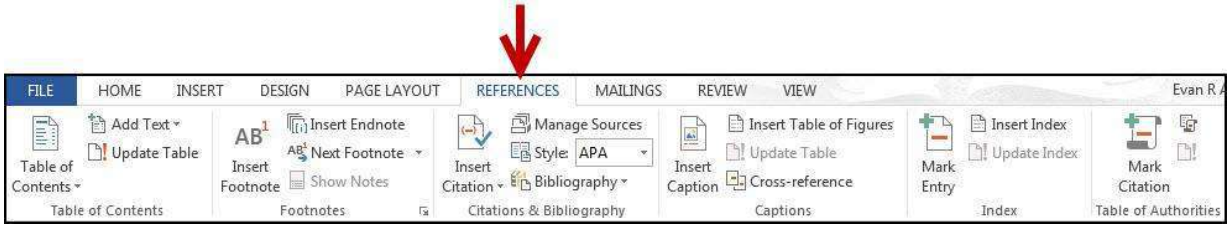

Figure 10 - References Tab

3. In the *Footnotes* group, click on **Insert Footnote** (See Figure 11).

Figure 11 - Insert Footnote

4. The footnote will be inserted into your document at the location selected, and at the bottom of the page. Type your **text** in the *footnote entry* at the bottom of the page (See Figure 12).

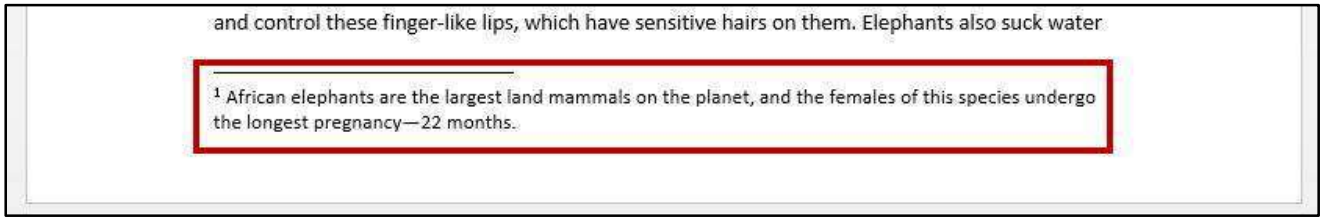

Figure 12 - Type your Footnote

5. Once finished entering your text, click **anywhere** within your document to leave the *footnote.*

6. To edit the text in your footnote, just click on the **text** in your footnote to edit.

Note: To insert an *Endnote*, follow steps 1 – 5 above, but select **Insert Endnote** instead (See Figure 13).

Figure 13 - Insert Endnote

Additional Settings for Footnotes and Endnotes

Additional settings are available for changing the location, layout, and format of footnotes and endnotes. To access these settings:

1. In the *Ribbon,* click the **References** tab (See Figure 14).

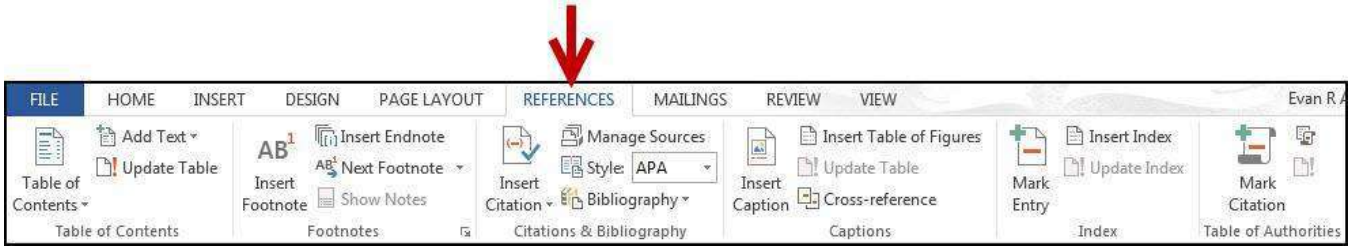

Figure 14 - References Tab

2. In the *Footnotes* group, click on the **Dialog Box Launcher** (See Figure 15).

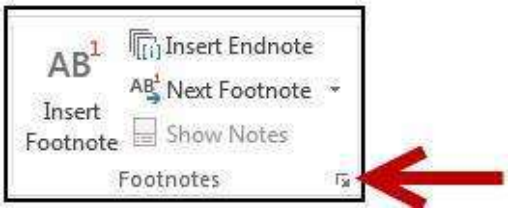

Figure 15 - Footnote/Endnote Dialog Box

3. The *Footnote and Endnote* window will appear (See Figure 16).

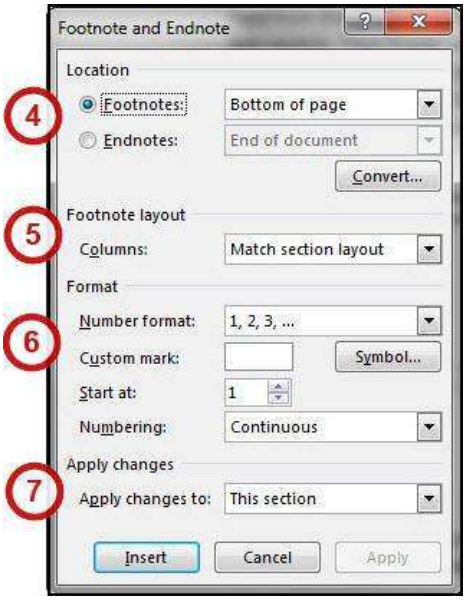

Figure 16 - Footnote and Endnote Window

4. The *location* section provides options for changing the location of where your *Footnotes/Endnotes* appear within your document.

5. The *Footnote layout* section gives you the option to split your footnote into columns.

6. The *Format* section provides options for altering the number format (e.g. I, II, III or A, B, C), changing the starting number, and whether to use continuous numbering throughout the document, or restart the numbering on each page or section.

7. The *Apply Changes* section allows you to apply your changes to certain sections of your document.

8. When finished making your changes, click the **Apply** button.

Adding Citations

A *Citation* is information about a source referenced in the document. By using the *Insert Citation* tool, you can add the citation to your document and the new source will be saved on your computer. You can then insert the citation whenever needed in your document from your "citation database". You can even insert citations into future documents you write!

To insert a citation to your document:

1. Click after the **text** where you want to insert your citation.

2. In the *Ribbon,* click the **References** tab (See Figure 17).

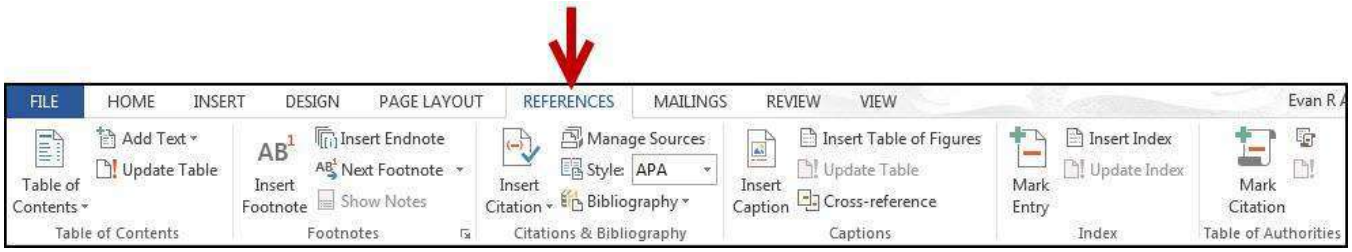

Figure 17 - References Tab

3. In the *Citations & Bibliography* group, next to *Style:,* click on the **dropdown** to select your citation style (See Figure 18).

Figure 18 - Select Style

Note: The style selected in step 3 will affect what information Word collects when creating your citation. If the *Style:* dropdown already shows your desired style, skip to step 4.

4. In the *Citations & Bibliography* group, click on **Insert Citation** (See Figure 19).

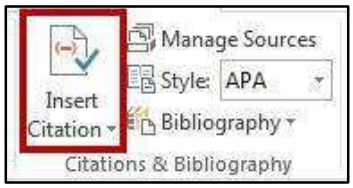

Figure 19 - Insert Citation

5. Click on **Add New Source** (See Figure 20).

Figure 20 - Add New Source

6. The *Create Source* window will appear showing the recommended fields to complete the source citation. Type your **information** into the fields provided (See Figure 21).

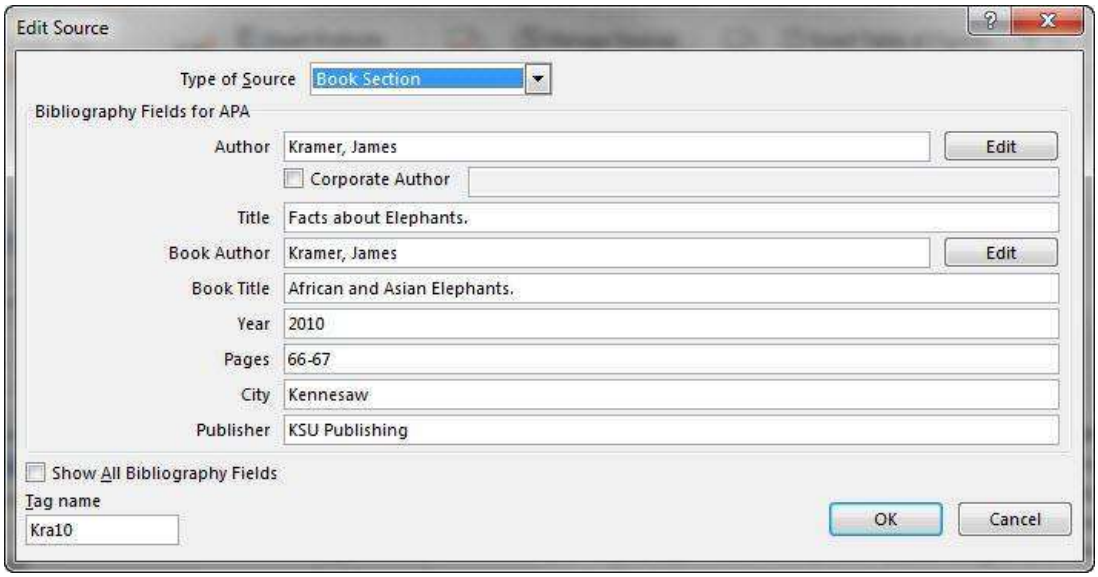

Figure 21 - Create Source

Note: Clicking on the **Edit** button (where available) will allow you to enter names via *first, middle, and last name*.

7. If you need to change the type of source you are citing, click on the **dropdown** box in the *Type of Source* field to select a new source (e.g. Book, Journal, Webpage, etc.) (See Figure 22).

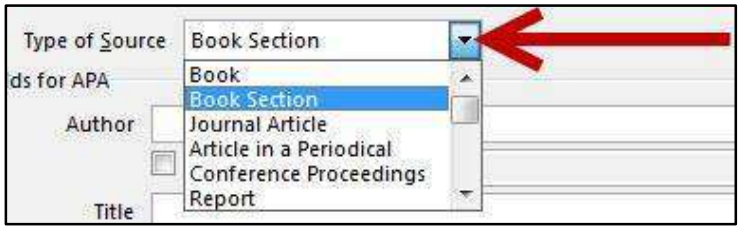

Figure 22 – Type of Source

8. If you need to add additional information, click the **Show All Bibliography Fields** checkbox (See Figure 23).

Figure 23 - Show All Bibliography Fields

Note: Additional fields will appear in the *Create Source* window with recommended fields marked with a red asterisk (*).

9. When finished creating your citation, click the **OK** button. Your citation will be added to your document.

10. To insert the same citation in a different area of your document, click on **Insert Citation**.

11. From the dropdown list, click on your **saved citation** to add to your document (See Figure 24).

Figure 24 - Insert Saved Citation

Adding Placeholders

Placeholders are helpful for placing a temporary citation into your document that you can later update. If you use the same placeholder multiple times, when you finally update the information, the rest of your placeholders will automatically update as well. To add a placeholder to your document:

1. Click after the **text** where you want to insert your placeholder.

2. In the *Ribbon,* click the **References** tab (See Figure 25).

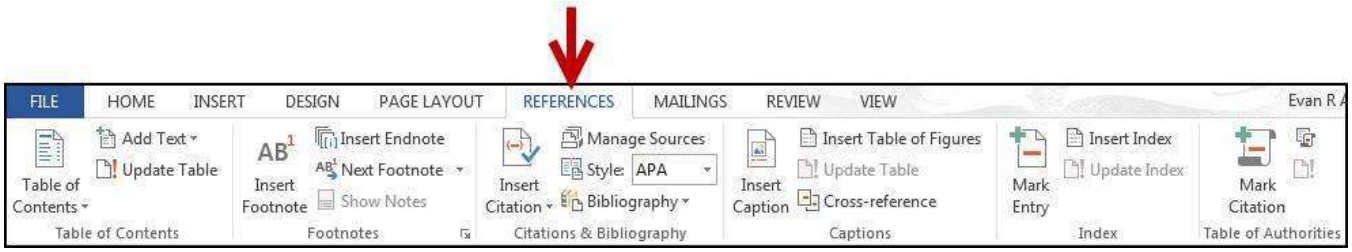

Figure 25 -References Tab

3. In the *Citations & Bibliography* group, click on **Insert Citation** (See Figure 26).

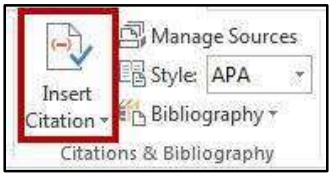

Figure 26 - Insert Citation

4. Click on **Add New Placeholder** (See Figure 27).

Figure 27 - Add New Placeholder

5. The *Placeholder Name* window will appear. Type a **name** for your placeholder (See Figure 28).

Figure 28 - Placeholder Name

Note: When typing a name for your placeholder, you will not be allowed to use spaces. The placeholder name should be something that will help you remember what source it belongs to later.

6. Click on **OK**. The placeholder will be inserted into your document (See Figure 29).

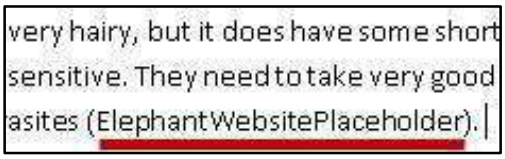

Figure 29 – Placeholder Added

7. To insert the same placeholder in a different area of your document, click on **Insert Citation**.

8. From the dropdown list, click on your **saved placeholder** to add to your document (See Figure 30).

Figure 30 - Saved Placeholder

Updating Citations and Placeholders

Citations and Placeholders can easily be updated once they have been inserted into your document. The following shows how to update citations/placeholders:

1. Click the **Citation/Placeholder** within your document to select it. A dropdown arrow will appear.

2. Click the **dropdown** arrow. A dropdown list will appear.

3. Click on **Edit Source** (See Figure 31).

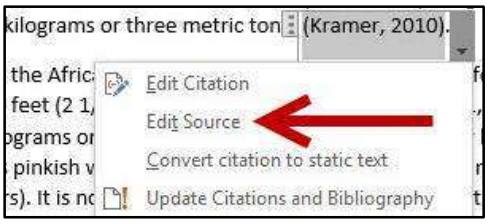

Figure 31 - Edit Source

4. The *Edit Source* window will appear. Make your updates to your citation/placeholder as required.

5. Click the **OK** button.

Note: When updating a placeholder that occurs multiple times in your document, you only need to click on one of them to update all placeholders of the same type.

Managing Sources

As you continue adding sources to your documents, Word will keep track of your sources. You can continue adding these sources to your document, and even use them in separate documents created on your computer. To manage your list of stored sources between documents:

1. In the *Ribbon,* click the **References** tab (See Figure 32).

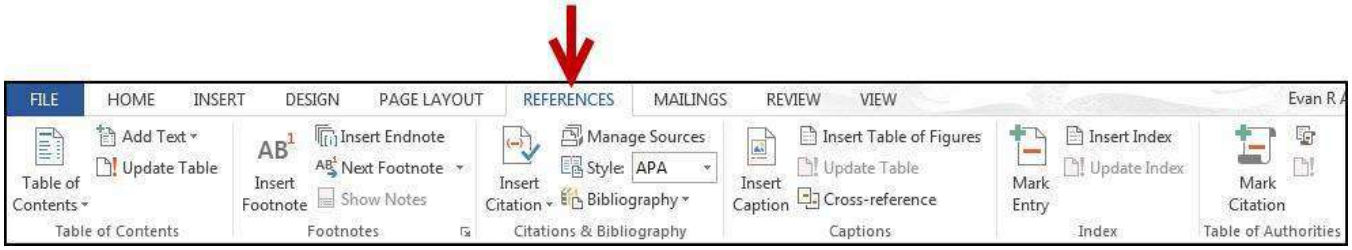

Figure 32 - References Tab

2. In the *Citations & Bibliography* group, click on **Manage Sources** (See Figure 33).

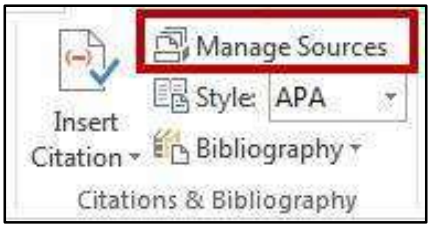

Figure 33 - Manage Sources

3. The *Source Manager* window will appear. The *Master List* will show all sources you have entered using the citation tool, while the *Current List* will show sources in your current document. From here you will be able to search, sort, copy, delete, edit, and add sources (See Figure 34).

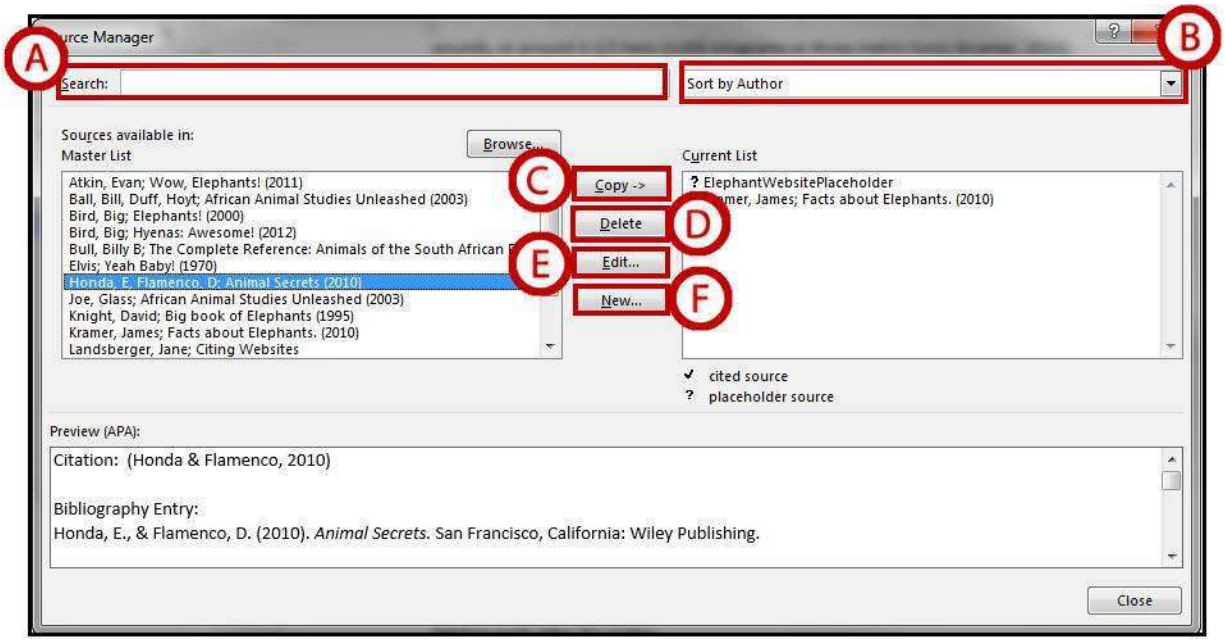

Figure 34 - Source Manager

A. To search for a particular source, type your **search parameters** in the *Search* field. The *Master List* will automatically search for your request.

B. To change how your sources are sorted, select an **option** from the *Sort by* dropdown.

C. To add one of your sources to your current list, select it from the *Master List* and click **Copy ->** to move it to your *Current List*. This will make the source accessible from *Insert Citation.*

D. To delete a source, select a source from either list, then click on **Delete**.

E. To edit an existing source, select the source from either list, then click on **Edit**.

F. To create a new source, click on **New**.

4. When finished making your changes, click the **Close** button.

Creating a Bibliography

A bibliography is a collection of your citations. If you have been using the *Insert Citation* tool, then Word can quickly and easily create a bibliography for you (similar to Inserting a Table of Contents). The following explains how to create a bibliography:

1. Click to place your cursor where you want to insert the bibliography (e.g. the end of the document).
2. In the *Ribbon,* click the **References** tab (See Figure 35).

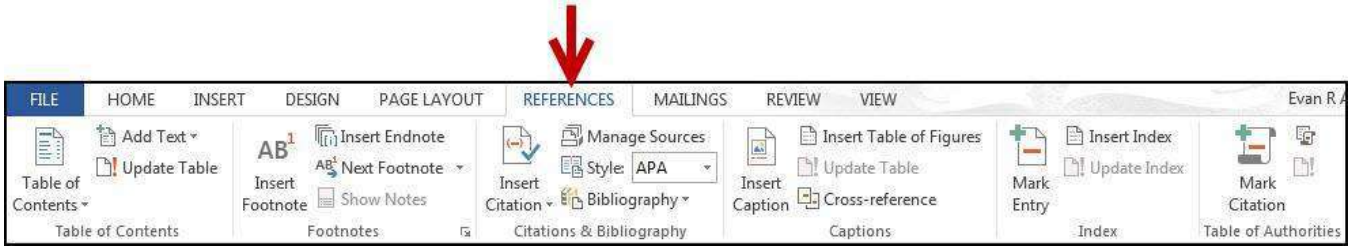

Figure 35 - References Tab

3. In the *Citations & Bibliography* group, click on **Bibliography** (See Figure 36).

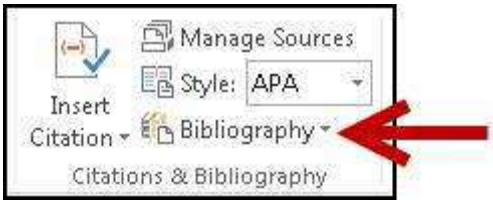

Figure 36 - Bibliography

4. A list of *Bibliographies* will appear. Click on **Bibliography** (See Figure 37).

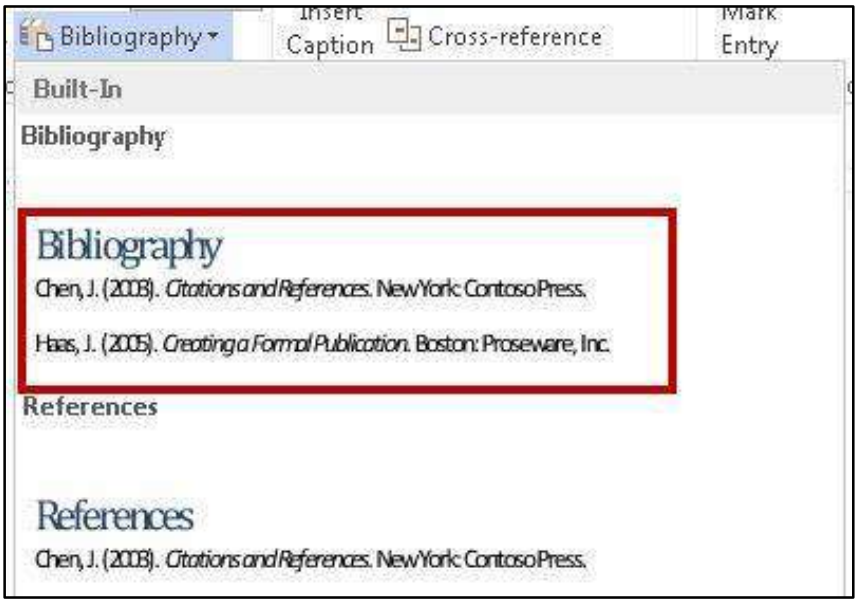

Figure 37 - List of Bibliographies

5. Your *Bibliography* will be inserted into your document (See Figure 38).

Figure 38 – Bibliography Inserted

Updating the Bibliography

If you make changes to the document after you have added the *Bibliography*, you can update it to reflect the new changed (e.g. additional sections added, or altered page numbers). The easiest way to do this is:

1. Click on the **Bibliography**. A tab with an *Update Citations and Bibliography* option will appear (See Figure 39).

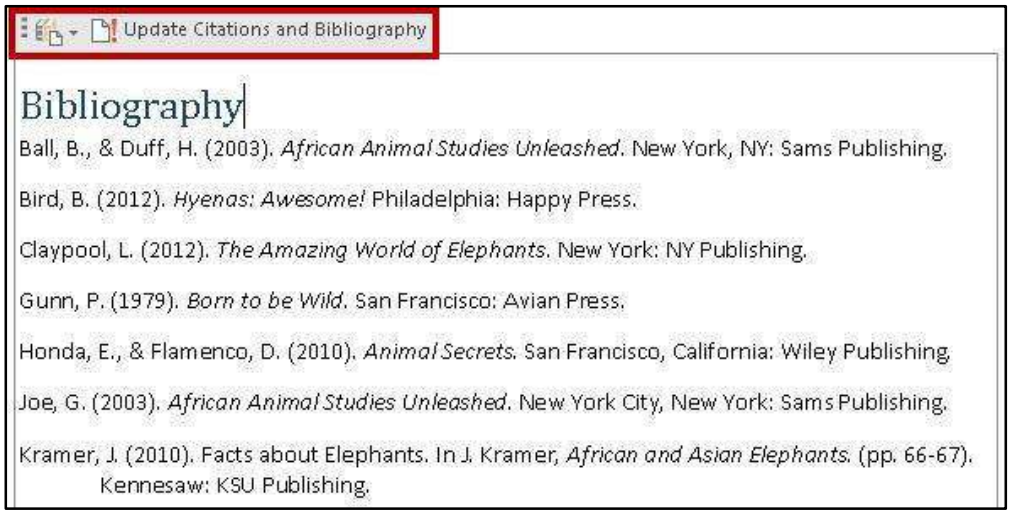

Figure 39 - Update Citations and Bibliography

2. Click on **Update Citations and Bibliography**.

3. Your *Bibliography* will be updated and any newly added citations will appear.

Inserting Captions to Pictures or Tables

If you are writing a long document with pictures, captions can help provide additional reference to your readers (such as the captions in this guide). Captions can be added to pictures, graphs, tables, that have already been inserted into your document. To add a caption to a picture:

1. Click on the **picture** to select it.

2. In the *Ribbon,* click the **References** tab (See Figure 40).

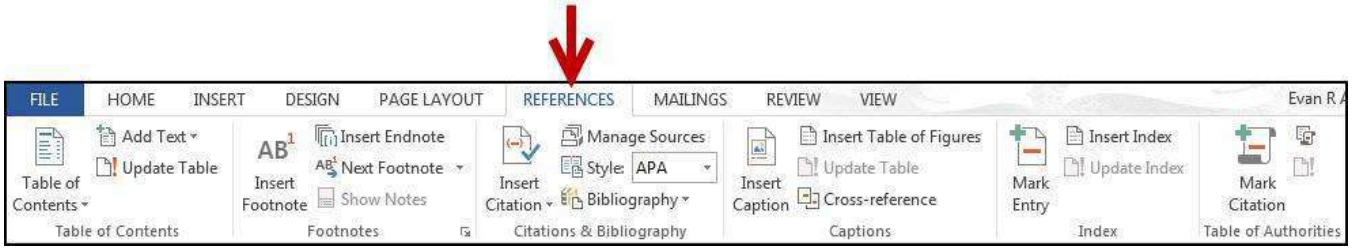

Figure 40 - References Tab

3. In the *Captions* group, click on **Insert Caption** (See Figure 41).

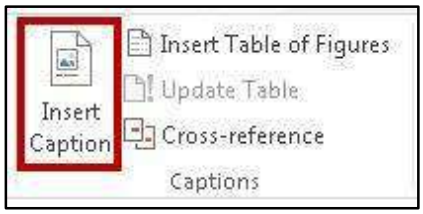

Figure 41 - Insert Caption

4. The *Caption* window will appear. Type a **name** for your caption in the *Caption:* field (See Figure 42).

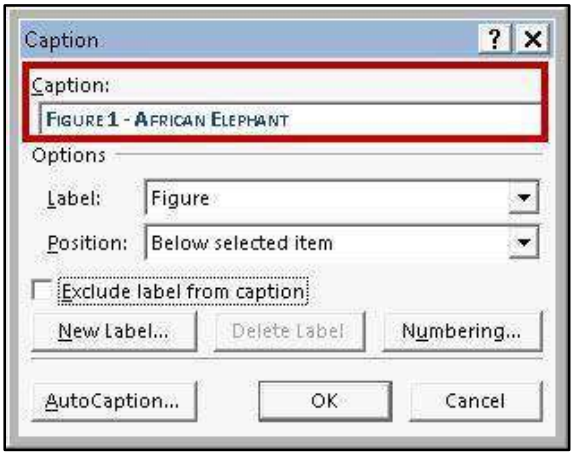

Figure 42 - Caption Window

Note: You can choose a different label for your caption, create a new label to display, or exclude a label altogether from your caption.

5. Click the **OK** button.

6. Your caption will be added to your picture (See Figure 43).

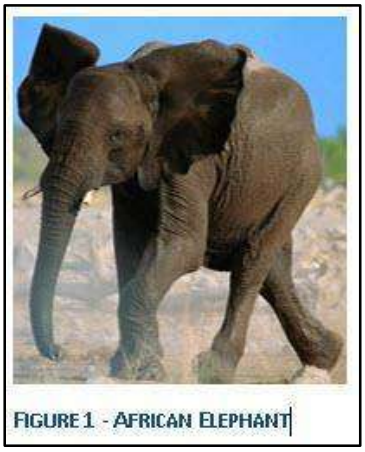

Figure 43 - Caption Added

7. Click on the **text** for the caption to edit.

Note: The process for adding captions to tables or charts is the same as adding captions to a picture.

Using a Cross-Reference

Cross-referencing information is helpful for when you need to direct the reader's attention to a chart, image, or section within your document. Once inserted, the cross-reference will make a note about the referenced information, and can create a link to redirect the reader (e.g. this document uses several cross-references. Try clicking on one of the "See Figure…" notes).

You can use the cross-reference feature to reference captions, footnotes, endnotes, headings, and more. The following will show how to cross-reference an existing caption within the document:

1. In the document, type the text that begins the cross-reference (e.g. "For more information, see…").

2. In the *Ribbon,* click the **References** tab (See Figure 44).

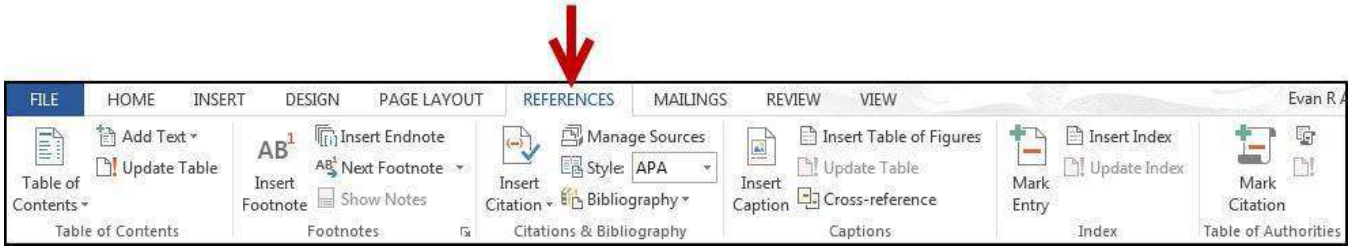

Figure 44 - References Tab

3. In the *Captions* group, click on **Cross-reference** (See Figure 45).

Figure 45 - Insert Cross-Reference

4. The *Cross-reference* window will appear (See Figure 46).

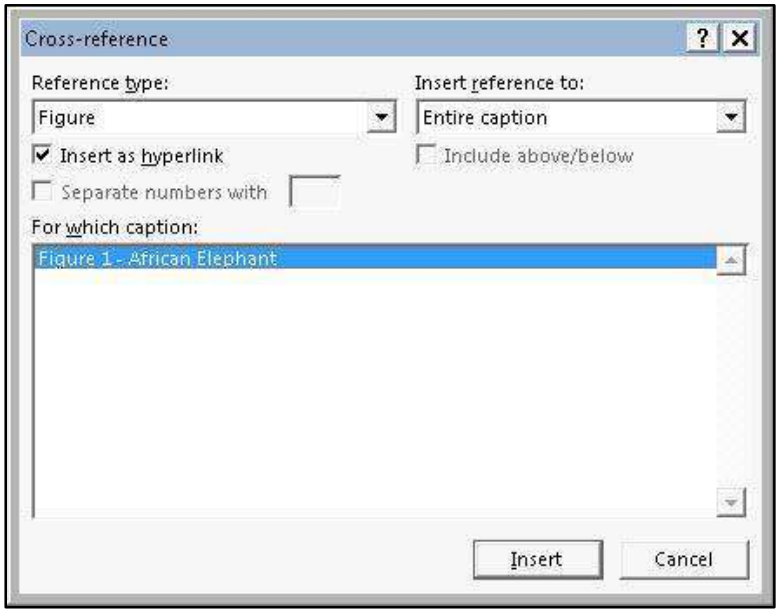

Figure 46 - Cross-Reference Window

A. In the *Reference Type:* dropdown, select a reference from the list (this example will use *Figure*) (See Figure 47).

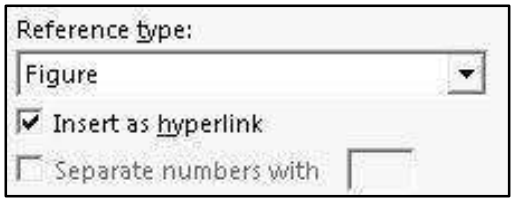

Figure 47 - Reference Type

Note: Make sure the *Insert as hyperlink* box is checked. This will insert the cross-reference as a hyperlink so readers can click the link to be redirected.

B. In the *Insert reference to:* dropdown, select how the reference will be inserted into the text (e.g. entire caption, only label and number, only page number, etc.) (See Figure 48)

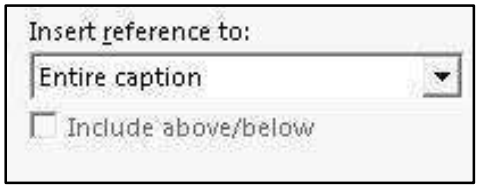

Figure 48 - Insert Reference To

C. In the *For which…* field, select the **reference** that will be inserted to your document (See Figure 49).

Figure 49 - Select Caption

5. Click the **Insert** button.

6. Your reference will appear in your document. Click on **Close** (See Figure 50).

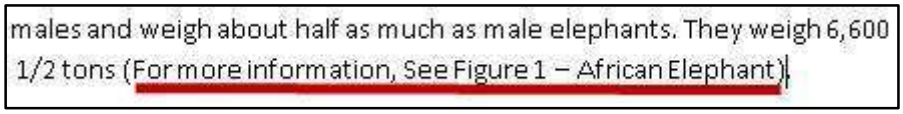

Figure 50 - Inserted Caption

Insert a Table of Figures

Similar to Inserting a *Table of Contents*, using the *Insert Table of Figures* tool can quickly create a table that contains all of the captions and which page they appear on in your document. To insert a table of figures:

1. Click to **place your cursor** in the document where you want to place the table of figures.

2. In the *Ribbon,* click the **References** tab.

3. In the *Captions* group, click on **Insert Table of Figures** (See Figure 51).

Figure 51 - Insert Table of Figures

4. The *Table of Figures* window will appear. Click on **OK** (See Figure 52).

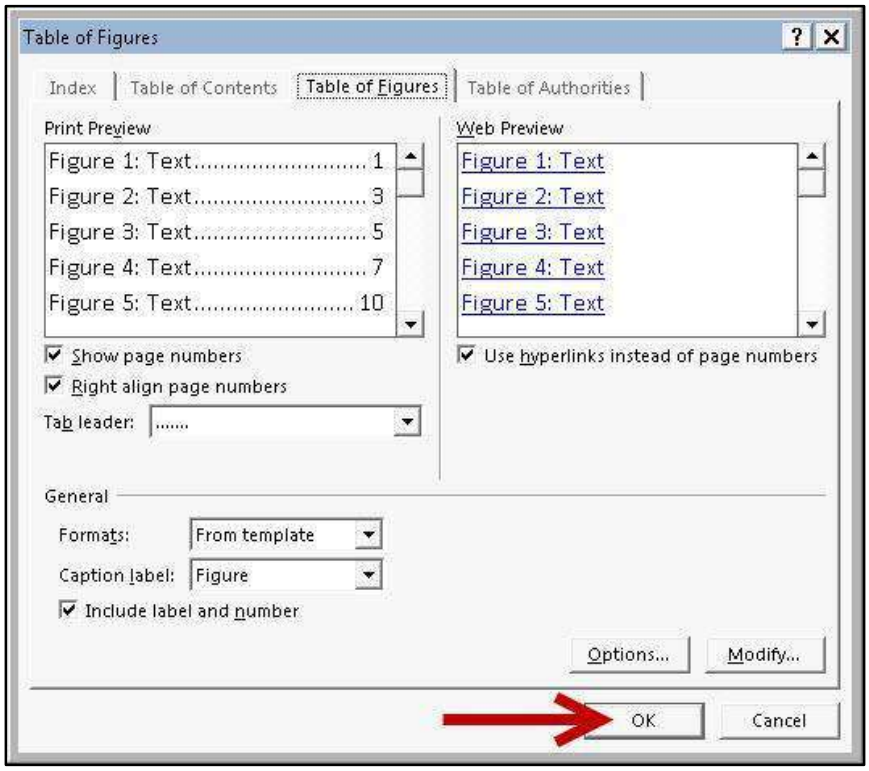

Figure 52 - Insert Table of Figures Window

5. Your *Table of Figures* will be inserted into your document.

Updating your Table of Figures

To update your *Table of Figures* after it has been inserted into your document, use the *Update Table* tool:

1. Click on the **Table of Figures** to select it.

2. In the *Ribbon,* click the **References** tab (See Figure 53).

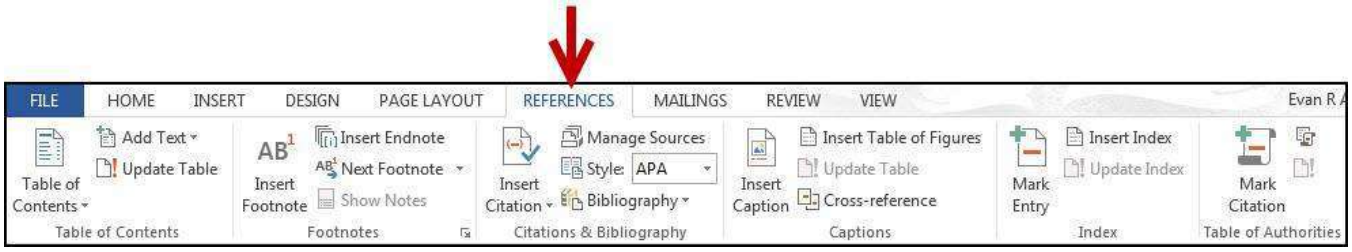

Figure 53 - Reference Tab

3. In the *Captions* group, click on **Update Table** (See Figure 54).

Figure 54 - Update Table (of Figures)

4. The *Update Table of Contents* window will appear. Click on **Update entire table** (See Figure 55).

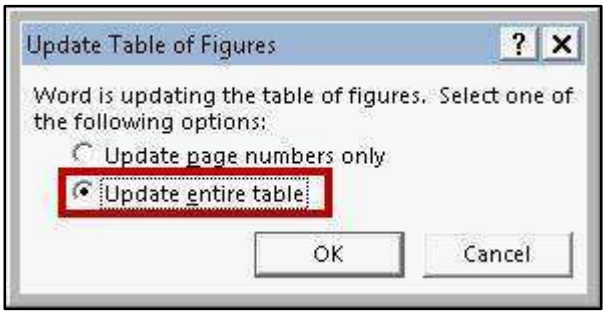

Figure 55 - Update Table of Figures Window

5. Click on **OK**. Your *Table of Figures* will be updated.

Note: It is recommended to select *Update entire table,* as this option will update page numbers and any additional figures added to your document.

Additional Help

For additional help or installation issues, please contact the KSU Service Desk (Faculty & Staff) or the KSU Student Help Desk (Students).

KSU Service Desk for Faculty & Staff

- Phone: 470-578-6999
- Email: service@kennesaw.edu
- Website: http://uits.kennesaw.edu/faculty-staff/

KSU Student Help Desk

- Phone: 470-578-3555
- Email: studenthelpdesk@kennesaw.edu
- Website: http://uits.kennesaw.edu/students/