

Citations and Bibliography Tools in Word



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Introduction

This tutorial includes step-by-step instructions for working with Citations, Bibliography and Research tools in Word 2016 with Office 365 subscription. Those who have fully paid versions of Office might not have some of the features discussed in this tutorial.

There is one document attached to this PDF tutorial that contains both Citations and a Bibliography. The Master List is the one that is associated with my Normal document template.

Choose a Document Style Guide

Before you begin writing a document, especially if you are in a degree program, you need to identify the document style guide that will be used for the document.

The default document style guide is APA or the American Psychological Association style guide. Even though a Style Guide is used for documents, individual academic institutions may have their own variations on the formatting.

Other style guides are Chicago, ISO and Harvard – Anglia.

The document style you choose will affect the way that citations, bibliographies, footnotes and endnotes will look in your document.

The style guide determines the format/layout for the document and its parts.

The keyboard command to open the list of document style guides or layouts is Alt + S, L for Reference Ribbon, Style.

Then press Alt + Down Arrow to open the list followed by the Up and Down Arrow keys to move through the list.

Press Enter on the document style you want to use, and you are returned to your document which now uses the style guide you chose.

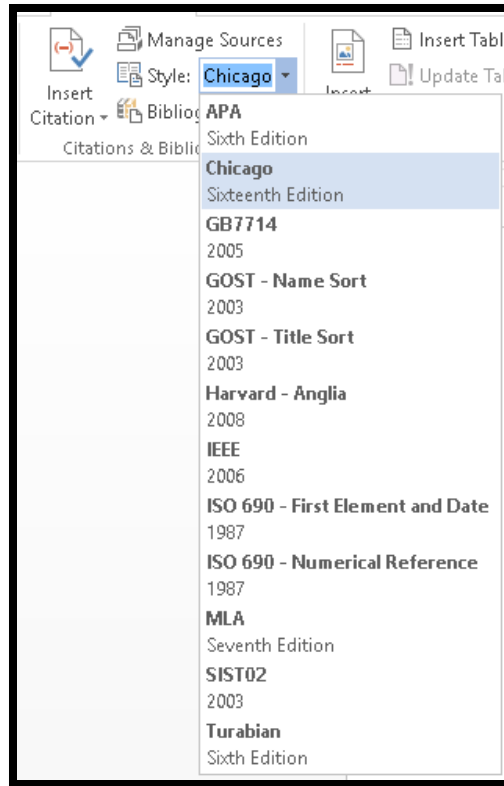


Figure 1 List of document style guides from Reference Ribbon.

Citations

There are two ways to use Citations in your document. If you insert a Citation, it is formatted like “McCall, 2014. It is inserted directly into the body of a document.

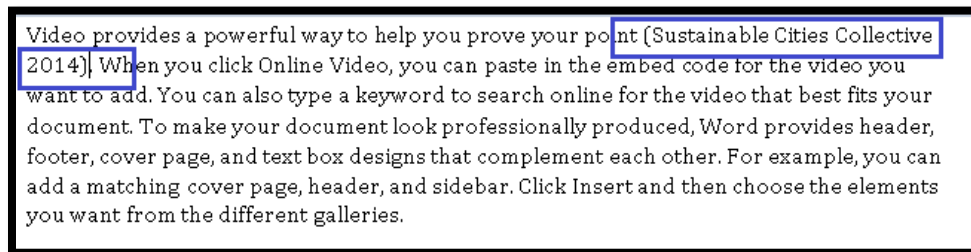


Figure 2 Paragraph showing APA style Citation.

Your document style guide may indicate that the use of Footnotes or Endnotes is preferred in which case, you would use those tools instead of the Insert Citation tool.

Even if you can't use the Insert Citation tool for your document, it is a good idea to start creating a source database because you can use this to build your Bibliography at the end of the document.

Citations can be used in two ways: to cite references within the document and/or to create a Bibliography at the end of your document.

Note: When you insert a Citation into the body of a document, it is in a Content Control. If you are using adaptive technology and reviewing your document, you may find yourself stuck in the Content Control with no way to get out. Most of the time pressing Ctrl + End to get to the end of the line will jog you out of the Content Control but it is tricky. You may also get some but not all information about the content Control you are in as Content Controls are not generally accessible.,

Let's get started!

Manage Sources – Master List Dialog

The first step to using Citations is to manage your source documents. Managing source documents includes creating them and deciding which ones are going to be used for specific documents.

For example, I am a disability rights advocate and my Citations database has many articles on disability rights, human rights, access to public transportation and accessible document design. When I author articles on these topics I can choose which articles are going to be useful for the article and associate them with the current article or document.

Once you create a source database it will be available to you for all documents you create.

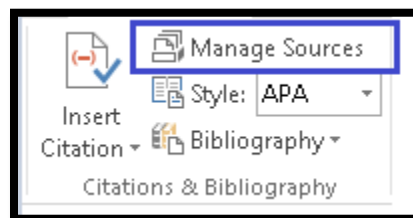


Figure 3 Manage Sources button on the Reference Ribbon.

To start, press Alt + S, M to open the Master List dialog from the References Ribbon. The button is called Manage Sources and is found in the Citations Group on the References Ribbon.

It doesn't matter where your cursor is at this time. Later in this tutorial we'll go through adding a Citation Placeholder where it does matter where your cursor is. For now, it doesn't. You can add a source at any time from any place in the document. Sometimes as I'm reading through articles I open Word and start adding the sources with only a blank document open so that I don't have to remember to do so when I'm working on a document.

You can add sources to Word any time. You don't have to have a working document open, just a blank document.

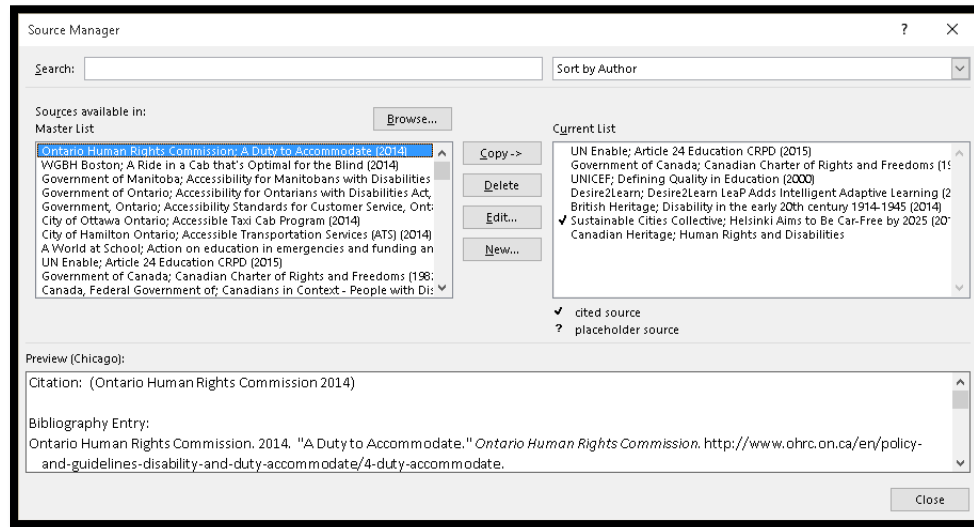


Figure 4 Master List dialog for sources.

The Master List dialog is divided into four main areas:

1. The entire list of sources you've added is on the left with its own search tool.
2. There are buttons for Copy, Delete, Edit and New in the centre.
3. The sources you are using in the current document are on the right with its own search tool.
4. A preview of what the citation will look like in the document and in the Bibliography is at the bottom of the dialog.

Just under the list of sources used in the current document are two pieces of information that are not accessible while in the list of current sources. One is a question mark used for Citation Placeholders and the other is a check mark used for Citations that have been used in the document. You can have a Bibliography of all sources, but the ones you've used will have a check mark beside them in the Manage List dialog.

Until you cite a source in the current document, there are no check marks in the list of sources available for the current document.

The last component of the Master List dialog is a Close button in the lower right of the dialog.

Add a New Source

The first step in using the Citations and Bibliography tools is to add sources. You can add several types of sources, each revealing different fields for information related to a specific type of source.

With the Master List dialog open (Alt + S, M), press Alt + N to activate the New button. The Create Source dialog opens, and focus is in the drop-down list where you can choose the type of source you are entering information for. For example, you can choose book article in periodical, report, conference proceedings, or website.

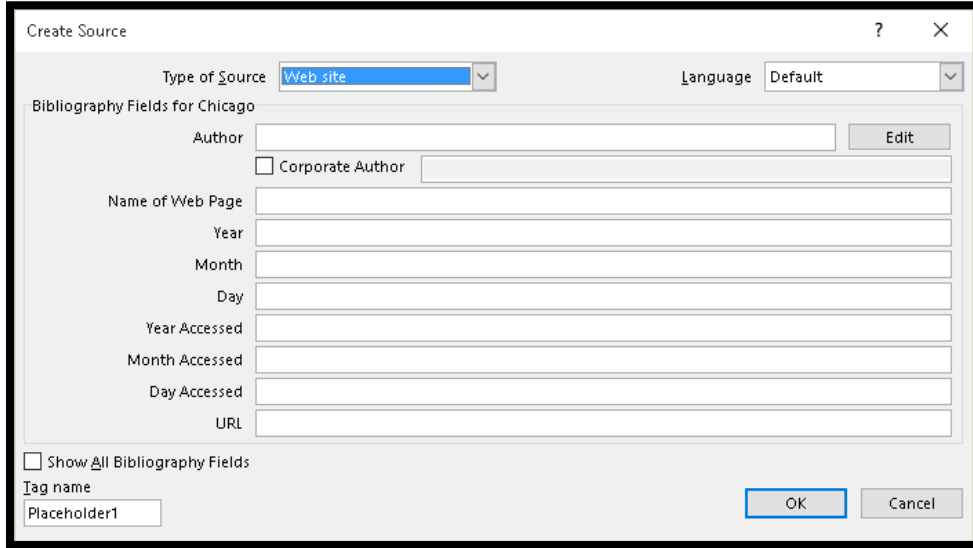


Figure 5 Create Source dialog.

The Create Source dialog will change depending on which document style guide you are using and which type of source you are creating. The last source I added was a website, so this is still chosen when I return to the Create Source dialog.

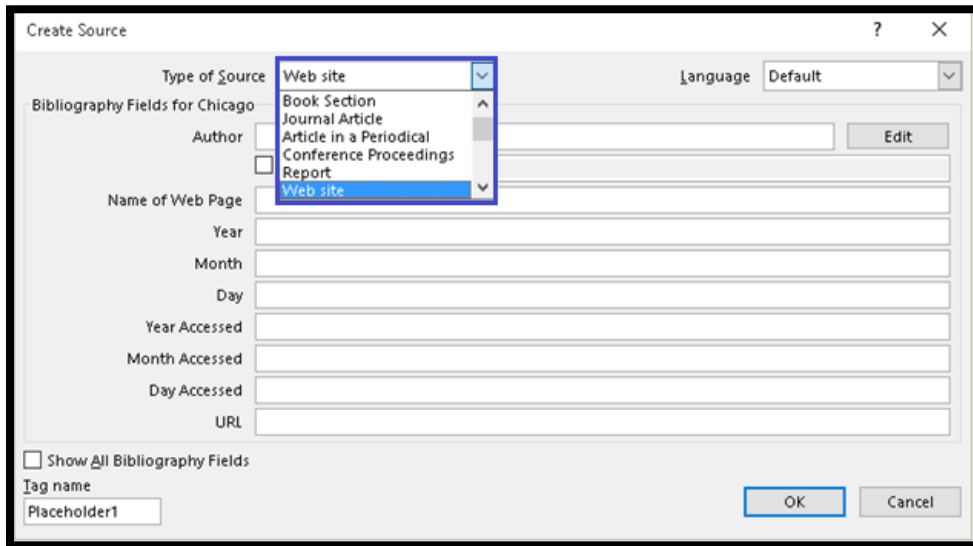
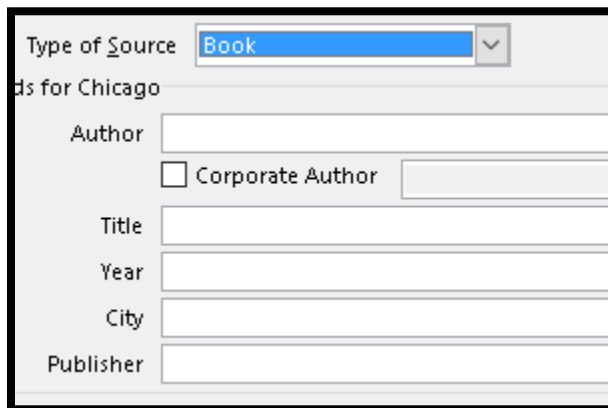


Figure 6 Create Source dialog showing types of sources you can add.

While you are viewing the fields for a specific type of source, nothing is required as information. All fields are optional. I found this useful when citing web resources because

they didn't always have the date information or the original publication date. Some documents don't even have an author or any helpful information to use in a Citation.

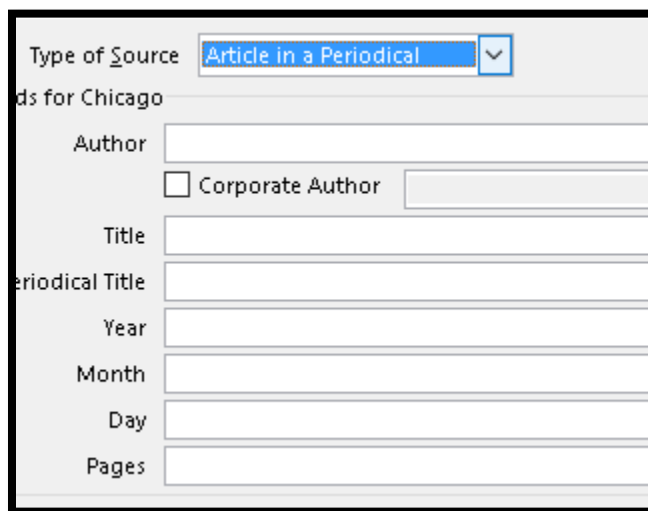


The screenshot shows a dialog box titled 'Create Source' with a dropdown menu set to 'Book'. Below this, there is a section for 'Style for Chicago'. The form contains several input fields: 'Author', a checkbox for 'Corporate Author' with an empty text box, 'Title', 'Year', 'City', and 'Publisher'.

Figure 7 Create Source fields for Book source.

There are no keyboard commands to move among the fields. You use the Tab and Shift Tab to move forward and backward through the fields for a publication.

The first element to identify is the language of the source. The default will be English in my case, but I can change it if I am entering a source in a different language. The language choices depend on the installed dictionaries on your computer. When I access the drop-down list, I can only choose English – Canada, English – United States, or French – Canada.



The screenshot shows a dialog box titled 'Create Source' with a dropdown menu set to 'Article in a Periodical'. Below this, there is a section for 'Style for Chicago'. The form contains several input fields: 'Author', a checkbox for 'Corporate Author' with an empty text box, 'Title', 'Periodical Title', 'Year', 'Month', 'Day', and 'Pages'.

Figure 8 Create Source fields for an Article from a Periodical source

Pressing Tab after you confirm the language of the document will take you to the Author field. This is where you enter the name or names of the source authors.

Note: If you are using the JAWS screen reader, JAWS will announce the document style guide you are using as well as the name of the field. This is one way to check to make sure that you are using the correct document style guide for the document. Of course, you can always double check by going to the Citations Group in the References Ribbon (Alt + S, L but this will open the drop-down list).

If you press Tab after the Author field, you'll land on an Edit button. This lets you enter multiple author information for the source.

The first field is for the Last Name. The second field is for the First Name. The third field is for a Middle Initial.

Once you have that information entered, press Alt + A to Add them to the list of authors for the source document.

You don't have to enter the authors in any specific order because once you start adding authors, you can select an author and move them up or down according to the order they appear in the source document. As you add authors, buttons are revealed to the right of the list of authors you've added.

When you select an author in the list of authors, you can press Alt + E to Edit the information, Alt + letter O to move the author Down in the list or Alt + D to Delete them from the list.

When you have finished entering the information for all authors, Tab to and activate the OK button by pressing Enter.

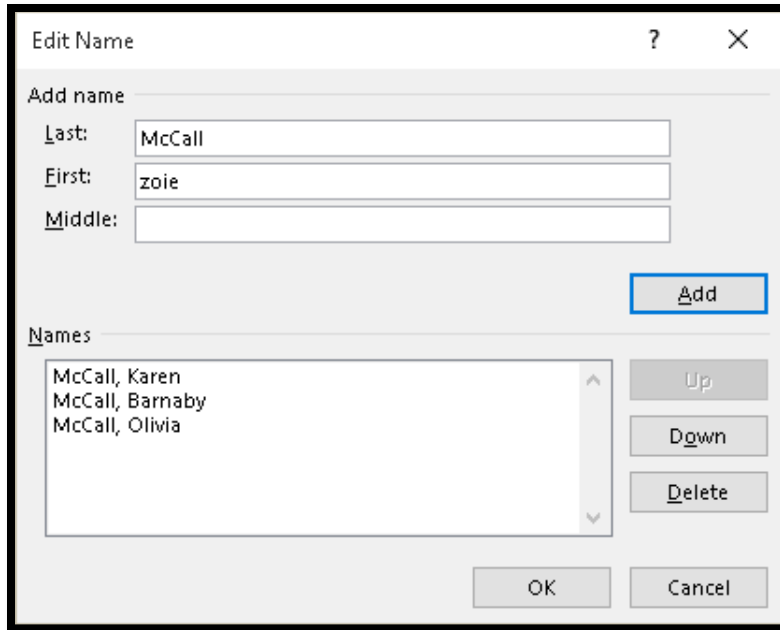


Figure 9 Edit Name dialog showing multiple authors.

You are returned to the Create Source dialog and all of the author names are listed according to the order they appear in the list in the Edit Name dialog.

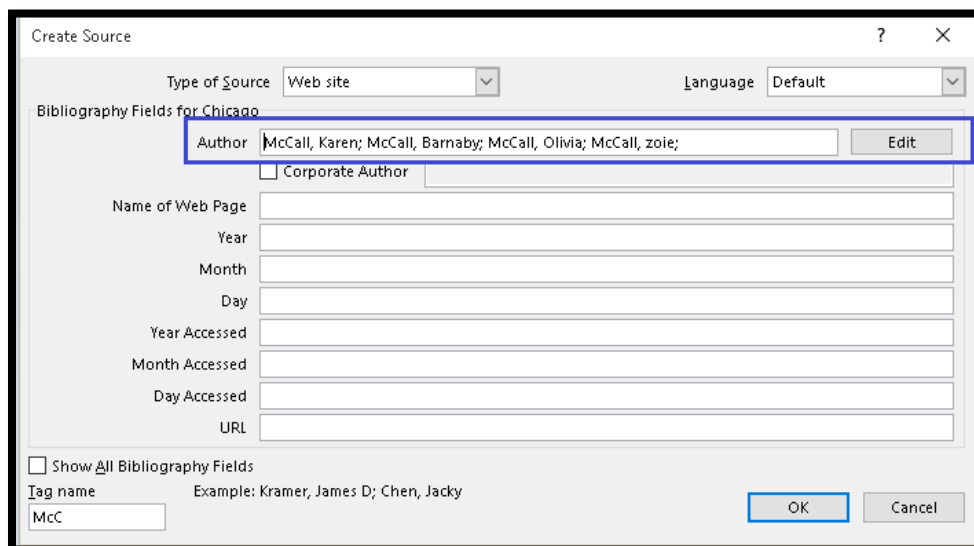


Figure 10 Create Source dialog showing multiple authors.

If there is no author but the publication is a report by an organization or a website article by an organization, pressing Tab will take you to the check box where you can identify that there is no specific author. When you check this check box, you will enter an edit box to identify the organization when you press Tab.

Figure 11 Area of the Create Source dialog where you can decide on authors or publication by an organization.

Once you have the information for authors or publication by an organization, press Tab to move to each of the following fields and enter information that you have.

There is a check box in the lower left of the dialog, just under the fields that will let you show all fields for a specific type of source. If you use this, almost all of the fields are required fields and you must enter information for all the required fields.

If you want to use this or explore the differences, press Alt + A to move to and check this checkbox. The Create Source dialog changes to show all fields.

Note: For those using adaptive technology such as a screen reader, you are not notified as to which fields are required. There is simply an asterisk to the right of each required field and a notation in the dialog that an asterisk denotes a required field.

The image shows the 'Create Source' dialog box in Microsoft Word. At the top, the title is 'Create Source'. Below it, there is a dropdown menu for 'Type of Source' which is currently set to 'Conference Proceedings'. Underneath, there is a section titled 'Bibliography Fields for Chicago'. This section contains a list of fields, each with a red star next to its name, indicating it is a recommended field. The fields listed are: Author, Corporate Author (with an unchecked checkbox), Title, Editor, Pages, Year, Conference Publication Name, City, Publisher, Volume, Short Title, and Standard Number. At the bottom left of the dialog, there is a checkbox labeled 'Show All Bibliography Fields' which is currently checked. At the bottom right, there is a legend consisting of a red star followed by the text 'Recommended Field'.

Figure 12 Create Source dialog showing All Fields for a Conference Proceedings source.

Pressing Alt + A again will uncheck the checkbox to show all fields and return you to the default set of fields for a source.

Once you begin entering information about the authors of a source, Word assigns the source a “Tag” which it then uses when inserting a Citation into the document. You can edit the Tag by pressing Alt + T. This will also let you just review the Tag that Word has created. This Tag has nothing to do with PDF Tags. It is simply the way that Word has of identifying the sources for Citations and Bibliographies. There is a specific syntax or set of rules for naming a Tag. Depending on what you change, you may get an error message.

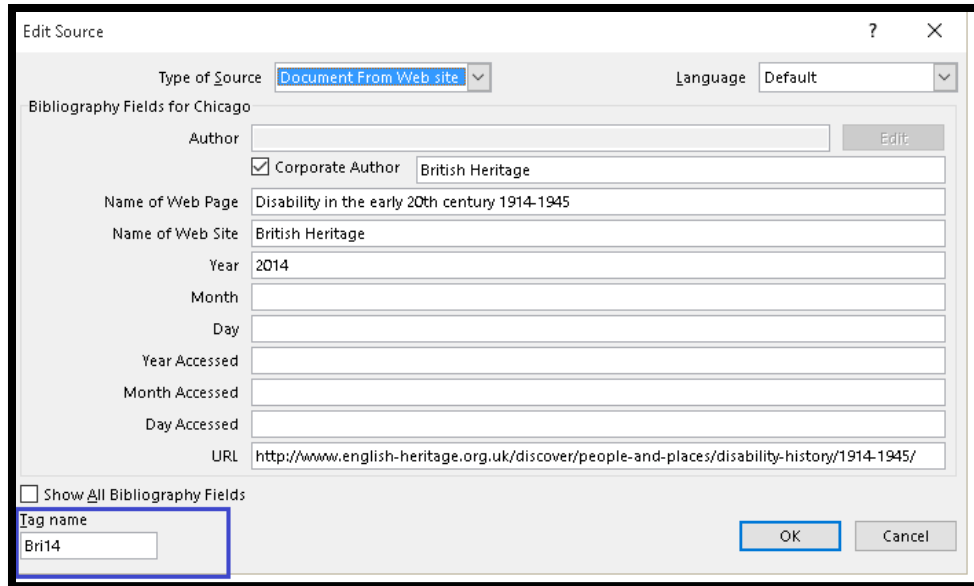


Figure 13 Create Source dialog with Tag area isolated.

After you complete the information for the source, Tab to the OK button and press Enter. You are returned to the Master List dialog.

The source you just added is in both the master list on the left and the sources available in the current document on the right.

Add a Placeholder Source

What happens if you are writing a document, need to cite a source but you don't have a source handy? Sometimes I'm writing and need to support an idea or statement and I know I've read something about this but don't know where it was. My cursor is where I want the source cited in the document.

I can launch Internet Explorer or any digital library tools and start searching for a source. When I find a source that supports my thoughts and ideas, I can press Alt + S, C, P for References Ribbon, Insert Citation, and Create New Placeholder.

The Placeholder Name dialog opens, and your focus is in the edit box where you can give the Placeholder source a name, or Tag. By default, it will be called Placeholder1 with no spaces. Tags in a Citation source have no spaces.

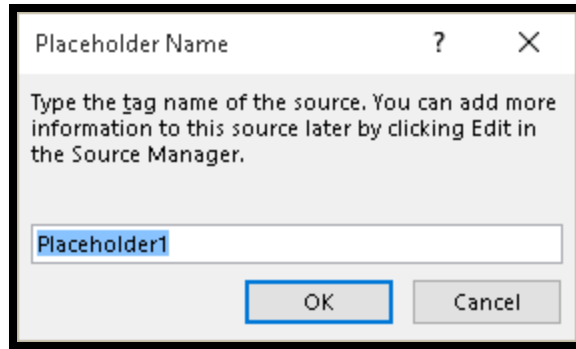


Figure 14 Placeholder Name dialog.

When the source has a temporary name for Word to reference, the Citation is inserted into the document using the Tag.

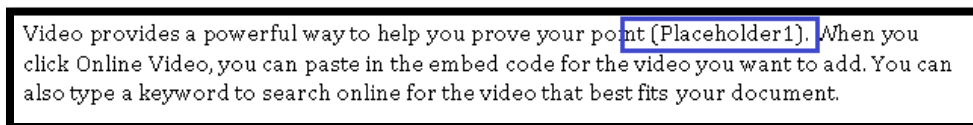


Figure 15 Temporary Placeholder source in document.

When you have finished your thoughts and have written supportive text, press Alt + S, M to open the Master List dialog.

Tab to the list of sources in the current document. You will find one in the list with the Tag name you gave it, or if you left the Tag as Placeholder1 that is what you'll see.

With the source selected in the list of sources in the current document, Press Alt + E to Edit the source. The Create Source dialog opens, and you can add all of the details for the publication.

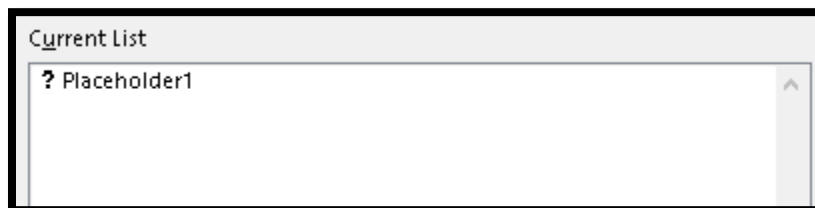


Figure 16 Placeholder source in Master Source list before editing.

When you've finished updating or editing the source, Tab to the OK button and press enter.

You are returned to the Master List dialog and your "placeholder" Citation has been updated with the new information. The Tag may also change based on the additional information provided.

As long as you don't edit the information for the Placeholder source, there will be a question mark in the list of sources available in the current document which indicates that the source information is not complete, and a Placeholder source was used. The lack of information for that source will also be reflected in your Bibliography.

Managing Sources

We've looked at adding sources to a blank document and adding a Placeholder source while we are working on a document. How can we use the Master List sources in any document we want?

First, open a new or existing document. If you press Alt + S, C to insert a Citation, you will see that there are none to cite.

Press Alt + S, M to open the Master List dialog.

All of the source documents, no matter the topic, are in the list on the left.

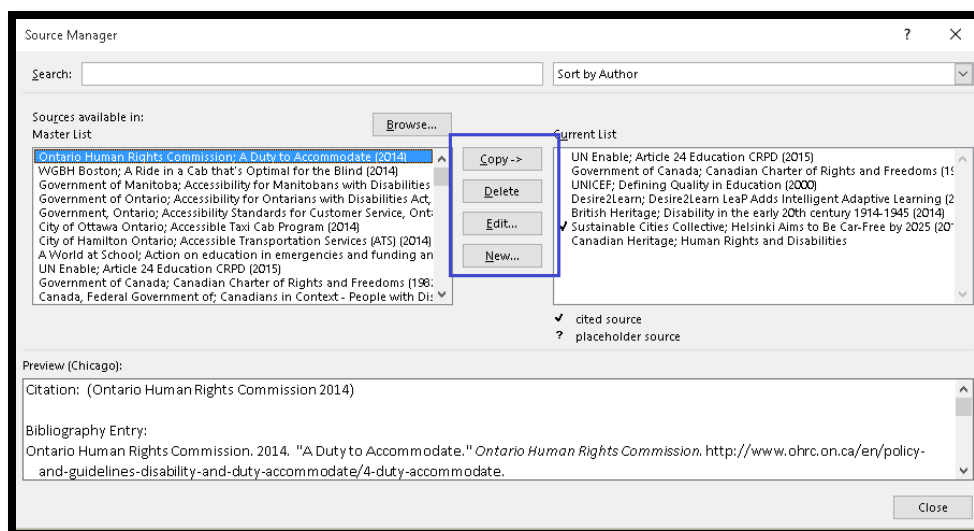


Figure 17 Master List dialog showing buttons in centre of the dialog.

Select a source on the left and press Alt + C to Copy it to the right. The area of the Master List dialog on the right is where Word will draw information for Citations and a Bibliography for the current document

You should be able to use first character navigation in the list of sources to find the one you want. This ability is dependent on the version of your adaptive technology. For example, JAWS 16 doesn't always let me use first character navigation but JAWS 17 does.

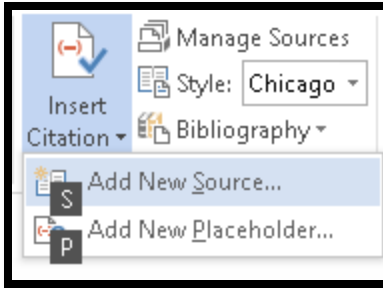


Figure 18 Insert Citation when there are no sources available in the current document.

When sources are added to the right side of the Master List dialog, you can easily use them in the document you are working with by inserting a Citation.

The full set of buttons down the centre of the Master List dialog are:

- Copy (Alt + C).
- Delete (Alt + D)
- Edit (Alt + E)
- New (Alt + N)

You can use any of these buttons for a source selected on the left or right of the dialog.

Insert Citation

Now that we have a variety of sources for our document, we can cite them in our document.

Place your cursor where you want the Citation inserted.

Press Alt + S, C for Reference Ribbon, Insert Citation.

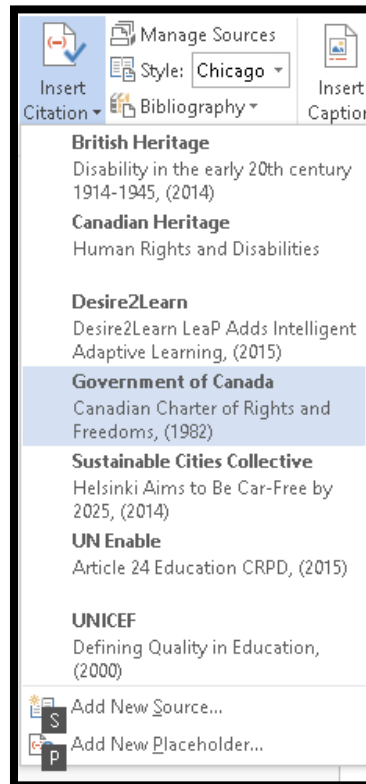


Figure 19 List of sources that can be cited in a specific document.

All of the sources you “copied” over to the list on the right of the Master list dialog appear alphabetically under the Insert Citation button.

Use the Up and Down Arrows to insert the source you want at the cursor point.

Once you press Enter on the Citation you want, it is added to the document at the cursor point and you can continue writing or editing the document.

There are two other items in the Insert Citation Gallery: Add New Source (S) and Add New Placeholder (P).

These two options let you quickly add a new source or a placeholder for a source you know you have but haven’t added it to the Master List yet.

Settings for Citations in Documents

Once the Content Control for a Citation is added to a document, you can make it static text if you are required to. Unfortunately, this has to be done for each Citation in a document on an individual basis. There isn't a way to globally make all Citations static text.

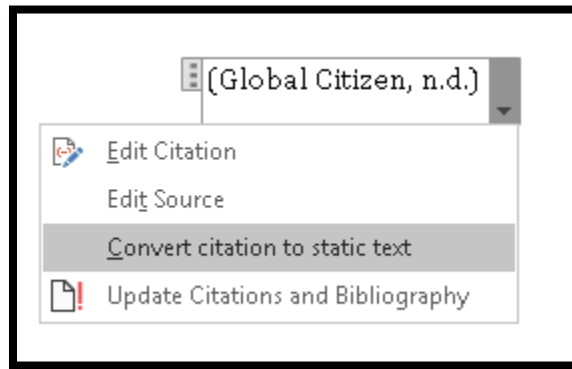


Figure 20 Context menu for a Citation Content Control.

To make a Citation static text:

1. Select the Citation in the document making sure you can see the arrow on the right of the Content Control.
2. Activate the Down Arrow for the Content Control.
3. Choose Convert Citation to Static Text. The keyboard command is C.
4. The Citation is now static text.

When you make a Citation Static text, the check mark is removed from the Citation in the Manage Source dialog. This means you won't know which sources you've cited and which ones you haven't. I usually make the Citations static text as the absolutely last thing I do before sending the document on or publishing it.

The other options you have in the context menu for a Citation Content Control are:

- Edit Citation.
- Edit Source.
- Update Citations and Bibliography.

If you select the Content Control and press the AppKey, you get a different context menu. It does include the ability to edit the Citation and the source, but it also contains other tools.

Cut.	Edit Citation.	Edit Field.	Font.
Copy.	Edit Source.	Toggle Field Codes.	Paragraph.
Paste Options.	Update Field.		

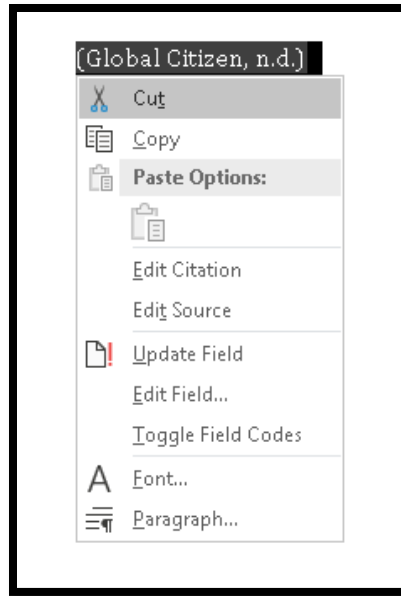


Figure 21 Context menu when the AppKey is pressed on a selected Citation.

If you want all of the Content Controls converted to static text in a Word document, save the document as a DOC file instead of a DOCX file. Content Controls did not exist prior to Office 2007 and the introduction of the DOCX file format.

Generate a Bibliography from Sources and Citations

Once you have the document written and have added the Citations, you can generate a Bibliography. Any source listed on the right side of the Master List dialog will be included in the Bibliography. This means that a work doesn't have to be cited to be included in the Bibliography.

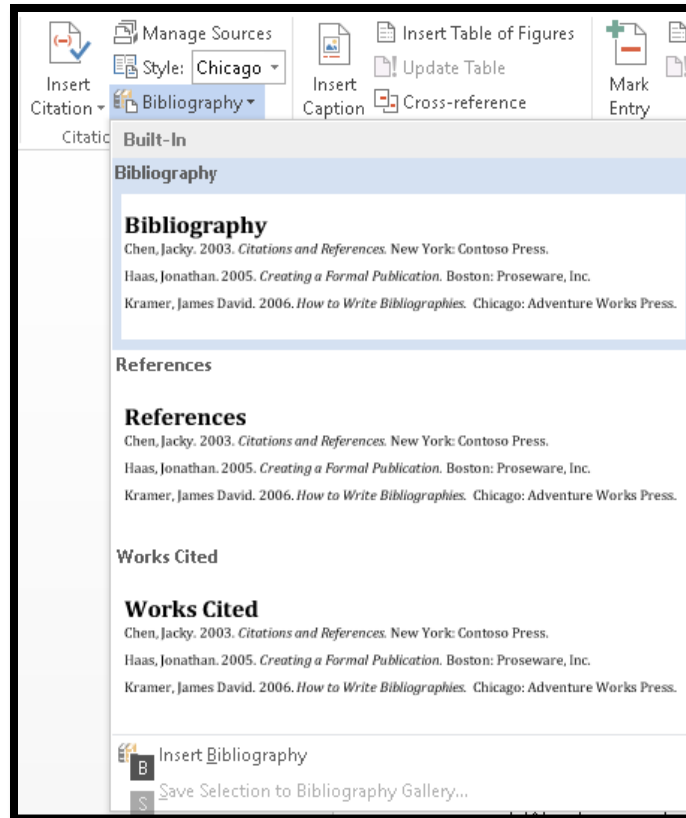


Figure 22 Insert Bibliography Gallery in the References Ribbon.

When the Insert Bibliography Gallery opens, there are some pre-configured Bibliography layouts.

Do NOT use these!

They are Content Controls that can create a barrier for adaptive technology. Adaptive technology may become stuck in them and lose the ability to reliably inform you of where you are in the Content Control.

I know that Citations ARE Content Controls, but I've tried to provide ways of confining the number of Content Controls used in documents with Citations. Use the ability to generate a plain old Bibliography for your documents.

Bibliography
Text

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<http://www.unicef.org/education/files/QualityEducation.PDF>.

Figure 23 Example of a Bibliography created from sources.

Instead of using the Content Control based Bibliography Gallery, set up your Bibliography ahead of time.

First, move to the area of the document where you want the Bibliography to appear.

Then Type a Heading for the Bibliography such as Resources, References or Bibliography.

Make that text a Heading level that corresponds with its role in your document. Make sure that the Heading is sequential with the previous Heading.

Press Enter to move to a blank line.

Press Alt + S, B, B for References Ribbon, Bibliography, Insert Bibliography.

Your source list is added to the document in alphabetical order formatted for the document style guide you chose.

Updating a Bibliography

Your document is finished! But what happens if you review the document before publishing and discover some unclear thoughts or the need for additional Citations?

Once the additional sources are added to the Master List and/or cited in the document, move to the Bibliography fields and press the AppKey. Press U for Update Field and the Bibliography will be updated with the new information.

If you are mouse dependent, you can right click anywhere in the Bibliography fields and choose Update Field.

Limiting Sources in a Bibliography

If you only want the sources cited to be part of your Bibliography, you will need to remove the ones without a check mark from the list of current sources (right side of the Manage Sources dialog.)

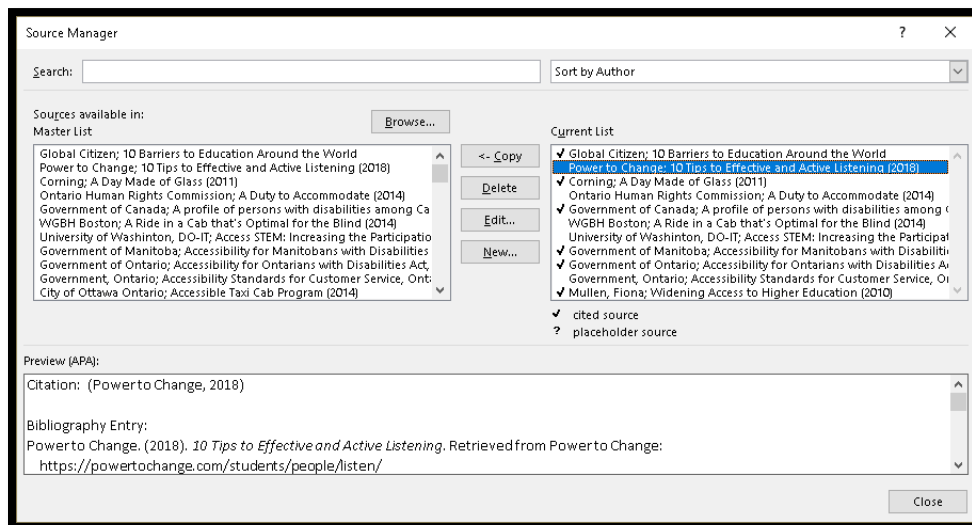


Figure 24 Manage Sources dialog showing an uncited article selected.

If you are using JAWS 2018 or later, you will hear the word “cited” after each source that has a check mark beside it identifying it as being cited in the current document.

When you land on an uncited source, one without a check mark, press Alt + D to Delete it from the list. Make sure you are on the side of the dialog that has the cited works checked! This is the right side of the Manage Sources dialog,

Once you have the uncited sources removed from the sources list on the right, press Alt + S, B, B to generate the Bibliography. This will produce a Bibliography with only cited sources.

Listing Bibliography Articles for Reference

I have over 200 sources in my Source Manager. The topics range from inclusive education, Inclusive education in disasters and conflict, access to accessible, affordable and reliable public transportation in rural communities, to how to develop advocacy and leadership skills if you are a person with a disability and equal access to the Internet and broadband for those living in poverty. There are times when I just need to know if I’ve already added a source to my Manage Sources list.

I open a blank document and then open the Manage Sources dialog (Alt + S, M).

I select all of the sources on the left. It is fast using the keyboard, hold down the Shift key and then press Page Down until all items are selected. You can't use Ctrl + A in the list, not sure why.

I then copy them all over to the right side of the Manage Sources dialog (Alt + C).

I can then press Alt + S, B, B and create a "Bibliography" that has all of my sources in it.

When I want to check and see if I've already added a source to the Manage Sources dialog, I can easily skim through the "Bibliography" document I've created.

This technique also lets me identify any duplicate sources I've inadvertently added so that I can go back into the Manage Sources dialog, locate the duplicate and delete it from the master list.

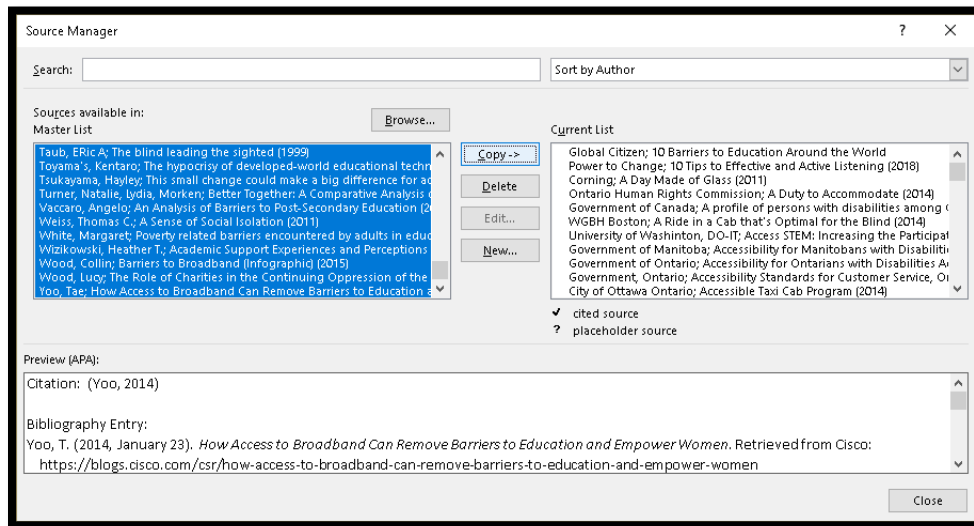
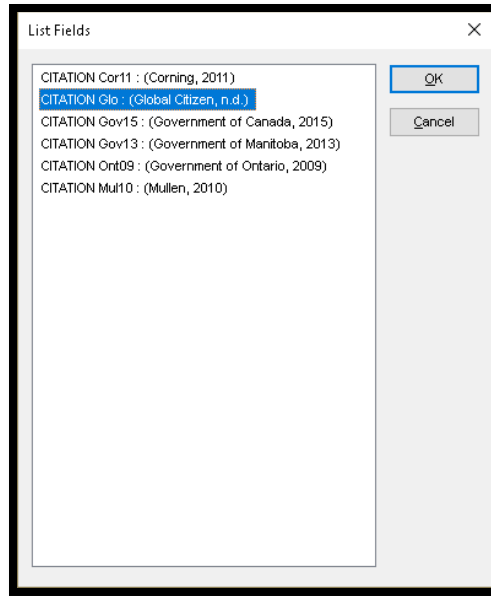


Figure 25 Manage Sources dialog with all of the sources on the left selected and copied to the right.

Finding Citations using the JAWS Screen Reader

If you are using the JAWS screen reader, you can get a list of the form fields in a Word document. The keyboard command is the same for other file formats/documents:

JawsKey + F5



Once you get a list of form fields in the document, you can navigate to any of them. This is a good strategy for finding where the Citations are in your document. It is also a good strategy to find any of the Content Controls in documents in general.

Unlinking Fields

Recently, while writing a chapter for a book, the editors wanted the Bibliography to have no active links. This would have taken a lot of time to do manually, selecting each link, pressing Ctrl + K, Alt + R to activate the Remove button and repeating that process.

I found a tool in Word called “Unlink Fields” that does the trick! It does not work well for a Table of Contents or on Content Controls, but it does work for parts of a document where you want the links to be static text, not active links.

The process by keyboard command is to select the content you want to unlink and press Ctrl + shift + F9.

There is an Unlink Fields tool that you can put on your Quick Access Toolbar!

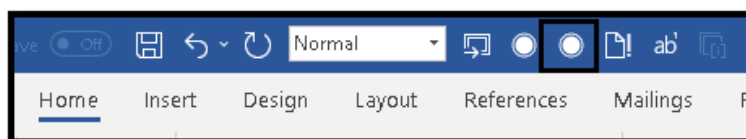


Figure 26 Quick Access Toolbar showing the Unlink Fields button.

In the previous image, the solid white circle outlined in black is the Unlink Fields button. The other button that is a white circle is for the Learning Tools. The button to the right of the Unlink Fields button is to Update all Fields in a document (once the content is selected)

and the button on the far-right toggles focus to Footnotes and back to the place where the Footnote was entered into the document.

There are a lot of nifty tools you can find in Word to put on the Quick Access Toolbar!

As you add more than 9 items, the keyboard commands start decreasing in number and add a 0 (zero) before them. For example, on my Quick Access Toolbar, which is shown in the previous image, View Footnote is Alt , 0, 9 and View Endnote is Alt , 0, 8.

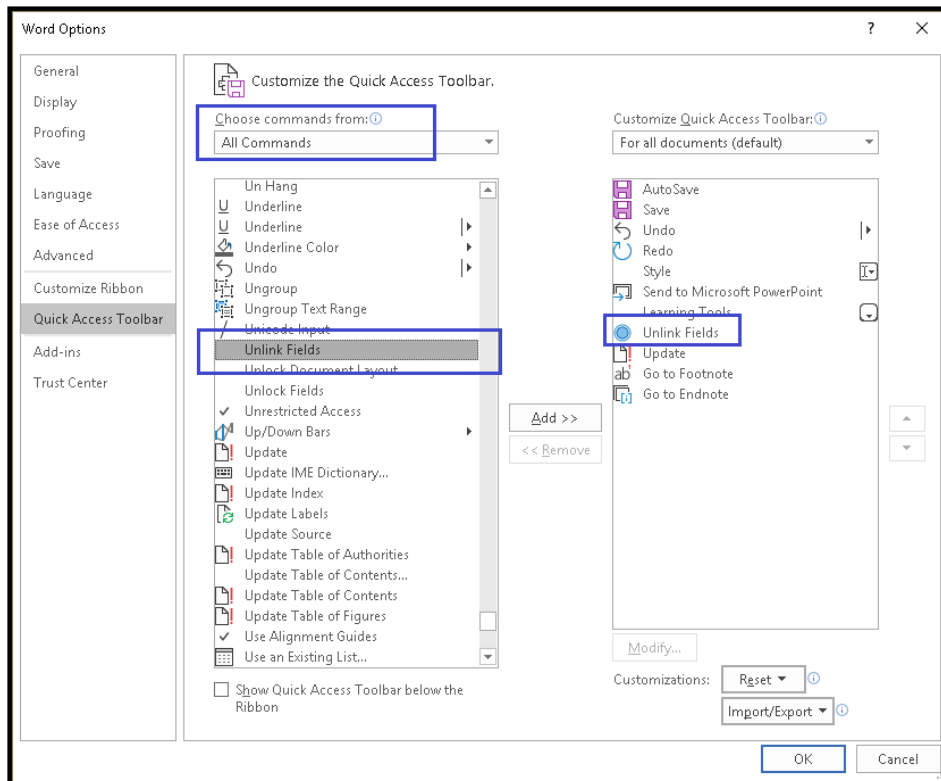


Figure 27 Word Options dialog showing the areas to verify to put Unlink Fields on the Quick Access Toolbar.

To put the Unlink Fields tool on the Quick Access Toolbar:

1. Press Alt + F, T for the File/Backstage area, Word Options.
2. Press Q for Quick Access Toolbar or click on it with the mouse.
3. Press Tab to move to the Choose Commands List or press Alt + C.
4. Once you've chosen to see all commands available in Word, press Tab to move to the list of all commands.
5. Press U for Unlink Fields which will move you to the first item in the list of all commands that starts with the letter U.
6. Use the Down Arrow until you select Unlink Fields.

- a. If you use Page Down instead, you'll jump past it.
7. Press Alt + A to Add Unlink Fields to the quick Access Toolbar.
8. It will be placed in the quick Access Toolbar in the next vacant place.
9. Tab to and activate the OK button by pressing the Spacebar or Enter.

You can change the position of Unlink Fields in the Quick access Toolbar by using the Up or Down buttons which will appear to the right of the list of tools on the Quick Access Toolbar once an item is selected in that list.

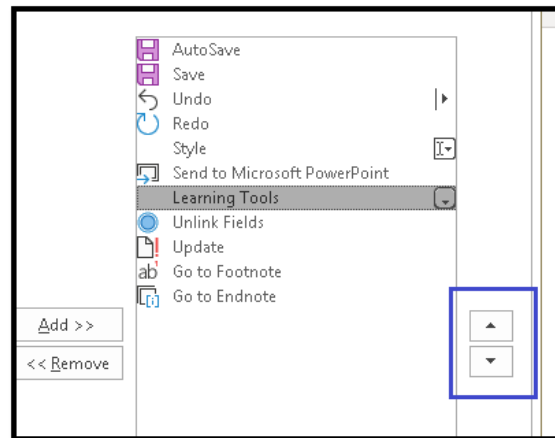


Figure 28 Buttons to the right of the list of tools on the Quick Access Toolbar in the Word Options dialog.

Contact Information

You can [contact Karen McCall](#) with any questions about this how to booklet or any suggestions for others. Visit the [Karen McCall School in Teachable](#)¹ for online courses, books and free tutorials.

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