

# Microsoft Word 2013™

## References & Bibliography (Level 3)

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### Introduction

A facility introduced in Word 2007 lets you add references to a document and then create a **Bibliography** at the end of the text. References are stored in a master list, which can be used to add references to further documents. Note that this facility is nowhere near as powerful as the special *EndNote* bibliographical software, which is available from within Word on the IT managed PCs on campus, and which can be purchased for installation on personal PCs.

### Creating the Document

Begin by creating a new document:

1. Start up Word 2013 as usual (or press <Ctrl n> for a new document if Word is already running)

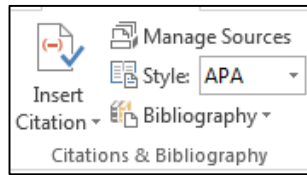
If your computer is running in *Compatibility mode*, you will first need to switch out of it. References and bibliography are new facilities in Word 2007 onwards and are not available in a Word 2003 format document. You must be saving your work in Word 2007/2013 format for the new features to work:

2. Press <Ctrl s> (or click on the [Save] button) – save in **My Documents** (or another location)
3. Type in a filename (eg **testrefs**) and check *Save as type:* is set to **Word Document (\*.docx)**
4. Press <Enter> for [Save]

# Inserting a Reference

To insert a reference (a citation) in your text:

1. Start by typing some text (anything will do)
2. Move to the **REFERENCES** tab on the *Ribbon* and note the *Citations and Bibliography* group:



3. Click on **[Insert Citation]** and choose **Add New Source...** - the *Create Source* dialog box appears:

4. Using the list arrow provided, set the **Type of Source** to whatever is required – here keep it as **Book**
5. Fill in the *Bibliography Field for APA* (use the example provided here or add your own reference):
  - **Author: Mickey Mouse** (press <Tab> three times)
  - **Title: A History of Cartoons** (press <Tab>)
  - **Year: 2010** (press <Tab>)
  - **City: Hollywood** (press <Tab>)
  - **Publisher: Disney Press**
6. Press <Enter> for **[OK]** when you have completed the entry – your reference appears in the text as (*Mouse, 2010*)

For some references, you may need to record additional fields. This next example shows you how:

7. Repeat steps 1 to 4 again, as above
8. Now turn on **Show All Bibliography Fields** - note what's available
9. Fill in the *Bibliography Fields* as below (or use one of your own references):
  - **Author:** Click on *Corporate Author* and type **British Broadcasting Corporation**
  - **Title: Cartoon Classics**
  - **Year: 2000**
  - **City: London**
  - **Publisher: BBC Publications**
  - **Pages: 1-34**
  - **Edition: 2nd Edition**
10. Press <Enter> for **[OK]** – your reference appears in the text as (*British Broadcasting Corporation, 2000*)

By using a *Corporate Author*, spaces in the author's name are ignored and the author appears in full. If you have a real author with a space in their surname (eg *Paul St John*), you must use a *non-breaking space* for the space. This special character can be typed using <Ctrl Shift spacebar>.

11. Repeat steps 1 to 4 again but change the *Type of Source* to a **Journal Article**
  12. Fill in the following *Bibliography Fields* as below (or use one of your own references):
    - **Author: Mouse, Mickey; Duck, Donald** (use a semi-colon to separate more than one author and note that you should enter names in the format *surname, first\_name*)
    - **Title: Drawing Cartoon Characters**
    - **Journal Name: Cartoon Journal**
    - **Year: 1996**
    - **Pages: 132–147**
  13. Turn on **Show All Bibliography Fields** and add
    - **Volume: 23**
  14. Press <Enter> for [OK] – your reference appears as (*Mouse & Duck, Drawing Cartoon Characters, 1996*)
- Normally, you wouldn't include the *Title* but this particular referencing style does. You'll see how to change this later. Try adding one further reference:
15. Repeat steps 1 to 4 again but change the *Type of Source* to a **Web site**
  16. Fill in the following *Bibliography Fields* as below (or use one of your own references):
    - **Name of Web Site: Mickey Mouse – The Official Site**
    - **URL: <http://disney.go.com/mickey>**

## Using a Placeholder

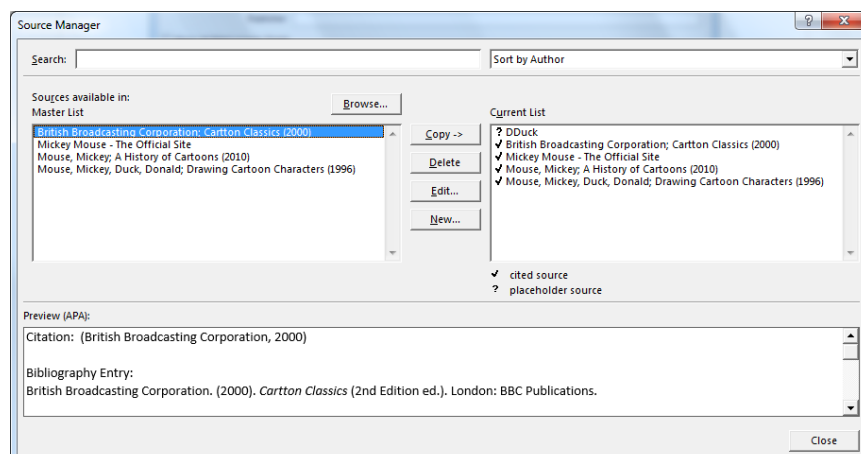
If you want to add a reference but do not have the full details with you, you can add it as a *placeholder*. You can then subsequently edit this with the details (you'll be doing this later). To create a placeholder:

1. First, type in some more text
2. Click on [Insert Citation] and choose **Add New Placeholder...** - a *Placeholder Name* dialog box appears
3. Type in a meaningful name (spaces and periods are not allowed) – eg **DDuck**
4. Press <Enter> for [OK] to close *Placeholder Name* – your reference appears as (DDuck)

## Managing Sources

The [Manage Sources] button in the *Citations & Bibliography* group allows you to edit and delete references from your master list. Another facility lets you add a new reference without including it as a citation. You can also copy references into a document from another master list:

1. On the **REFERENCES** tab, click on [Manage Sources] – the *Manage Sources* dialog box appears:



Note that you have a Current List of the references in the document you are working on and a Master List of all your references. References which have already been cited in the text have a tick against them; the placeholder is shown with a question mark against it. It's now time to turn the placeholder into a reference:

2. Select the placeholder reference (*DDuck*) and **[Edit...]** it
3. If necessary, change *Type of Source* to **Web site**
4. Type in the following Fields:
  - **Name of Web Page:** Donald Duck
  - **Name of Web Site:** wikipedia
  - **URL:** [http://en.wikipedia.org/wiki/Donald\\_Duck](http://en.wikipedia.org/wiki/Donald_Duck)
5. Press **<Enter>** for **[OK]**

Currently, your new reference is only held in this document. To store it in your master list:

6. With the reference still highlighted, click on **[<- Copy]** to move it into the *Master List*

You can also add new references here:

7. Click on the **[New...]** button - the *Create Source* dialog box appears, as before
8. Change *Type of Source* to **Conference Proceedings**
9. Add the following Fields:
  - **Author:** Walt Disney
  - **Title:** The Early Days
  - **Pages:** 2-19
  - **Year:** 1970
  - **Conference Publication Name:** Third Disney World Conference
  - **Publisher:** Disney Press
10. Press **<Enter>** for **[OK]** to add the reference to your current and master list

To remove a reference from the current document:

11. Select the new reference and **[Delete]** it from the *Current List* – don't worry, it's still in your *Master List*
12. Reinstate it by selecting it in the *Master List* and **[Copy ->]** it back
13. Finally, **[Close]** the *Source Manager* – you could also press **<Esc>**

## Inserting a Bibliography

1. Check that you are at the end of your text then press **<Enter>** for a new line
2. Click on the **[Bibliography]** button in the *Citations & Bibliography* group

You can now choose from three built-in formats (*Bibliography*, *References* or *Works Cited*) or you can just insert the list of references using **Insert Bibliography**. Here, use the first built-in format:

3. Choose **Bibliography** – the references are listed with a heading of *Bibliography*

Note that all the references in the *current list* are shown (not just the ones cited – *Disney* is unticked). To remove the Disney reference (and then update the bibliography):

4. Click on **[Manage Sources]**, select the *Disney* reference in the *Current List* and **[Delete]** it
5. Press **<Esc>** to **[Close]** the *Source Manager*
6. Click on the bibliography – it is surrounded by a blue box with two buttons on the top
7. Click on the second button **[Update Citations and Bibliography]** and *Disney* is removed from the list

The first button (**[Bibliographies]**) lets you change the heading to *References* or *Works Cited*.

You don't have to use a built-in format. Try creating your own instead:

1. Drag through the *Bibliography* and <Delete> it – you may need to press <Delete> more than once
2. Next, type in your own heading: **List of References** and press <Enter>
3. Click on the **[Bibliography]** button and choose **Insert Bibliography**

A bibliography created this way doesn't have a blue box and buttons. To update it, simply *right click* on the list and choose **Update Field**.

## Styles

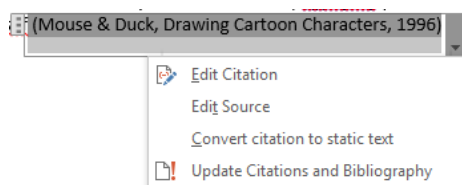
There are several referencing styles built in to Word. So far you have been using the default style, APA, but this might not give you the results you want. You can easily choose a different style, which will immediately be reflected both in your bibliography and the individual references:

1. First, click at the end of your text
2. Now click on the list arrow attached to the **[Style:]** button in the *Citations & Bibliography* group
3. Choose a different style (eg **Harvard** - perhaps the most commonly-used style) and note the effect
4. Repeat step 3 to see what some of the other styles are like (**ISO 690 – Numerical Reference** gives you just a number in the text and a numbered list of references)
5. End by setting **[Style:]** back to **APA**

Sadly, it's not possible to customise the built-in styles (or, indeed, to create your own). There is the facility, however, to convert your references and/or bibliography into editable text. You would only do this if you really needed to (and once you have finished your document and generated the bibliography).

To convert a reference to text:

6. Click on the *Mouse & Duck* reference in the main text – the reference is shaded with a blue box around it
7. Click on the arrow attached to the right of the blue box – a menu appears:



8. Choose **Convert citation to static text** - note that you can also edit the citation or source here
9. Remove the title of the paper *Drawing Cartoon Characters*, (drag through the words then <Delete> them)
10. Try changing the **[Style:]** –the reference in the text doesn't change, but the bibliography entry does
11. End by pressing <Ctrl s> to **[Save]** the latest version of your work

## Adding References to Another Document

Once you have a Master Source, you can use it to add references to other documents. Each document has its own set of references, which all appear in the bibliography (whether cited or not). To see this:

1. Press <Ctrl n> for a **[New]** document
2. Move to the **REFERENCES** tab and click on **[Manage Sources]**
3. Select the references you want in your new document from the master source on the left
4. If you have a lot of references, you may need to use of the **Search:** box or change **Sort by** to **Year** or **Title**

**Tip:** Hold down <Ctrl> and click to select non-adjacent references or use *click* and <Shift> *click* to select a group (just like you can throughout Microsoft – eg to select emails or files)

5. Click on [**Copy ->**] to move your references across – make sure you have more than one
6. Press <Esc> to [**Close**] the *Manage Sources* dialog box
7. Now type in some text then add a reference as before ([**Insert Citation**] and choose the one you want)
8. Finally, add the bibliography (click on [**Bibliography**] and choose **Bibliography**)

Again, you'll find that all your references appear, not just the one cited.

## Keeping your Master List

You may wish to keep a copy of your master source file (the reference list in the document itself is). To copy the master source from its current location into *My Documents* and then link to it from there:

1. Click on [**Manage Sources**] on the **REFERENCES** tab
2. [**Browse...**] for the *Source* file (which is located in a special *Bibliography* folder on drive C:)
3. *Right click* on **Sources.xml** and choose **Copy**
4. Now click on **Documents** on the left
5. *Right click* in *Documents library* and choose **Paste**
6. Finally, press <Esc> twice to first [**Cancel**] then [**Close**] the *Source Manager*

You should now have a copy of the file in *Documents*. Next time you want to add references to a piece of work, use this file as your source file. In other words:

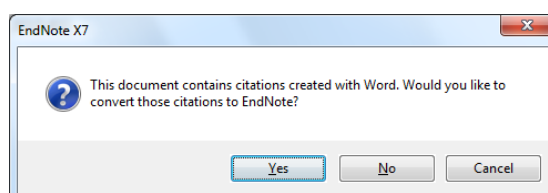
7. Repeat steps **1** and **2** as above
8. Next click on **Documents**
9. Select the file **Sources.xml** then press <Enter> to [**Open**] it
10. [**Copy ->**] the required references to your *Current List* then [**Close**] the *Source Manager* and continue as before (using [**Insert Citation**] etc)

You can use this method to create more than one master reference file, should you want to.

## Converting to EndNote

Any references inserted using Microsoft's own referencing system can be converted and stored in EndNote (the recommended referencing system on the University PCs). Try this next:

1. Begin by moving the typing position back into your text (ie away from the bibliography)
2. Move to the **EndNote** tab (this will not be available on your own PC unless you have installed the software), click on [**Go to EndNote**] and wait for it to load
3. Open EndNote's **File** menu and choose **New** then **Create a New Library**
4. Supply a *File Name* (eg **test**) then click on [**Save**]
5. Open the **References** menu and choose **New Reference** – or simply press <Ctrl n>
6. Don't worry too much about the fields in the reference – just supply an *Author* and a *Year*
7. Close the *New Reference* window, saving the reference when prompted
8. Click on the [**Insert Citation**] button – or simply press <Alt 2>
9. Press <Enter> for [**Yes**] when asked whether you want to convert the Word citations to EndNote:



Your original citations will now be held in your document using different codes, but your EndNote Library still only contains a single reference. The original ones are held in a *Travelling Library* in the Word file. To bring them into the EndNote Library:

10. Move to the **EndNote** tab and click on the [**Export to EndNote**] button on the far right
11. Choose **Export Traveling Library** – press <Enter> for [**OK**] twice when prompted
12. Finally, go back to EndNote and click on **All References** – you should find they are now all there
13. End by closing your file (save it if you want to) and exiting Word
14. If you don't want to keep the files *Sources.xml* and *testrefs.docsx*, click on the [**Start**] button, choose **Documents**, select each file in turn and <Delete> it

## Searching Libraries

Sadly, you don't have the facility to search the University Library (Unicorn) like you can with the EndNote bibliographical software. With EndNote, you can look up a book or journal and add the reference into your library of sources. If you are writing a thesis, you are advised to use EndNote rather than the limited referencing facilities in Word.

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