

Karlen Communications

Footnotes and Endnotes in Word



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Introduction

It is relatively easy to create footnotes or endnotes in your document.

I use Footnotes or Endnotes to optimize Word documents for accessibility. They let me use a link in regular paragraph text so that readability and comprehension aren't disrupted while providing a long web address for reference if the document is printed and taken to a meeting or study group.

Footnotes appear at the bottom or "foot" of each page they are used on while endnotes appear at the end of the document. Endnotes may be after the regular text of a document but before any Appendices or they may be after the Appendices. It depends on the document style guide you are using. Endnotes do, however, appear before an Index in a document.

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 American Psychological Association style guide.

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.

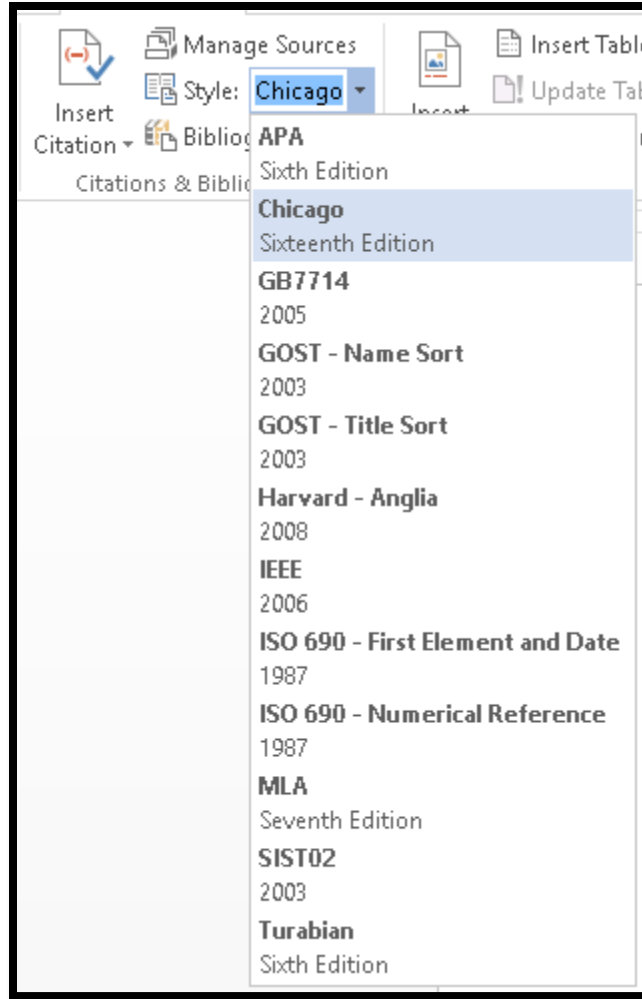


Figure 1 List of document style guides from Reference Ribbon.

Footnotes

To insert a Footnote, place your cursor at the end of the word or phrase you are referencing and press Alt + S, F for References Ribbon, Footnote.

You can also press Ctrl + Alt + F to do the same thing.

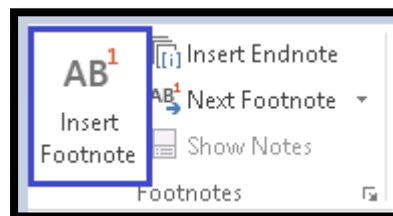


Figure 2 Footnotes on the References Ribbon.

If you are in Print View of the document, A Superscript number is inserted at the cursor point and focus goes to the bottom of the page where the Footnotes area has been set up automatically by Word.

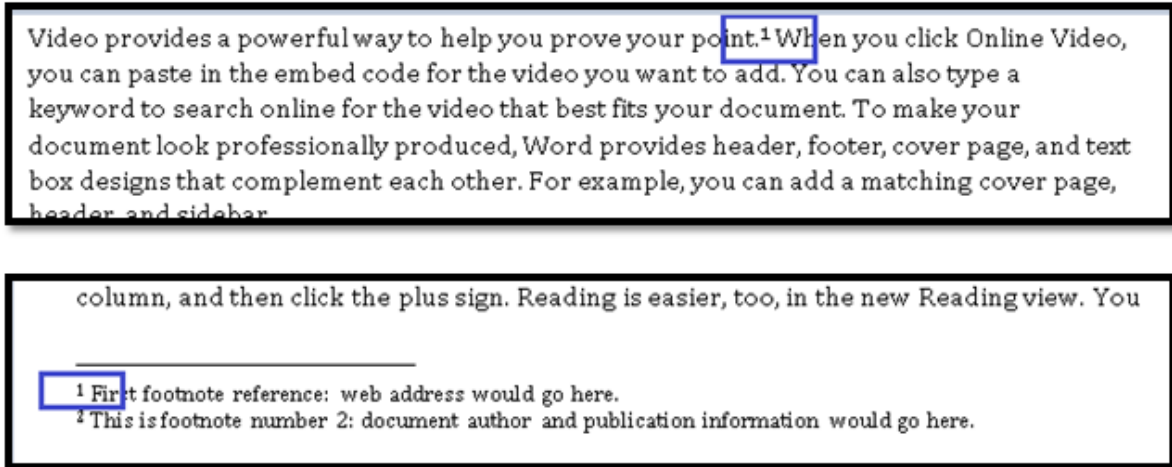


Figure 3 Footnote in document and at bottom of page.

Some people prefer to use draft View of their document. In Draft View, the Footnotes area at the bottom of the page is not visible. Instead you use the Notes Pane which will open at the bottom of the document just under the scrollbar.

The keyboard command to Show Notes which will either show or hide the Notes Pane is Alt + S, H.

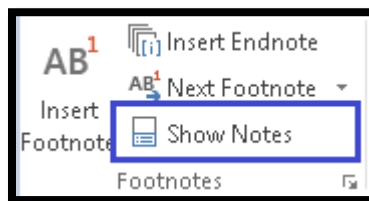


Figure 4 Show Notes in Reference Ribbon (for use in Draft View only).

When you are in Draft View and add a Footnote, a superscript number is placed in the document at the cursor point. The Notes Pane automatically opens and focus is where you can enter the information for the Footnote. The Footnote number has already been inserted so you just have to type the Footnote reference information.

Note: The JAWS screen reader will announce Footnote Pane if you are creating Footnotes or Endnote pane if you are creating Endnotes instead of just saying “Notes” Pane. JAWS will also tell you whether you are in a Footnote or Endnote area of your document if you are in Print View.

Video provides a powerful way to help you prove your point.¹ When you click Online Video, you can paste in the embed code for the video you want to add. You can also type a keyword to search online for the video that best fits your document. To make your document look professionally produced, Word provides header, footer, cover page, and text box designs that complement each other. For example, you can add a matching cover page, header, and sidebar.

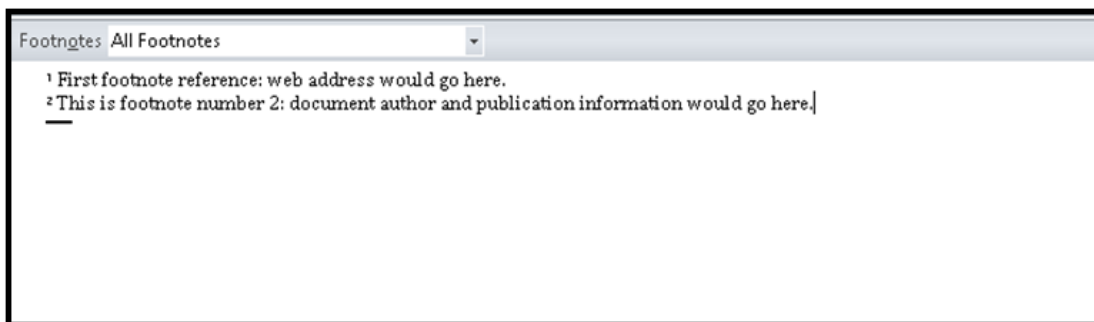


Figure 5 Footnote in document and in Notes Pane.

The format of the Footnote information will depend on the document style guide you are using. The default is APA (American Psychological Association) but other document style guides such as the Chicago Style can be used.

The numbering begins at 1 for the first Footnote and as each Footnote is added, a sequential number is added to the Footnote area of the page.

If you are in Print View of the document and are using adaptive technology such as a screen reader, you can get back to the point in the document where your last Footnote is by pressing Alt + S, letter O for the Next Footnote button in the References Ribbon and choosing Previous Footnote.

The complete keyboard command is Alt + S, letter O, P.

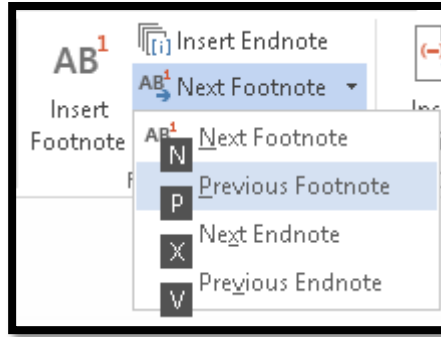


Figure 6 Previous Footnote in References Ribbon.

If you are using the Notes Pane in Draft View, you can press F6 which should move you back to the Document Pane or document with your cursor just before the Footnote.

JAWS Screen Reader and footnotes/Endnotes

If you are using the JAWS screen reader, there are keyboard commands for working with Footnotes and Endnotes. The JAWS keyboard command for reading a Footnote or Endnote is Alt + Shift + E. Your cursor has to be on the Footnote or Endnote in the document. JAWS identifies the Footnote or Endnote number and reads the information in the Footnote area/Footnote pane. If you are not on a Footnote or Endnote, JAWS tells you there is no Footnote or Endnote at the cursor point.

Endnotes

Endnotes are created just like Footnotes but instead of putting the reference information at the bottom of each page, the references are gathered at the end of the document (but before an Index).

To insert an Endnote in a document, place your cursor at the end of the word or phrase you are referencing and press Alt + S, E for References Ribbon, Endnote.

You can press Ctrl + Alt + D to insert an Endnote at your cursor point.

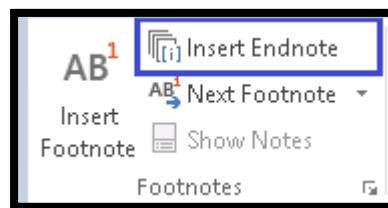


Figure 7 Endnotes on the References Ribbon.

In Print View, a number is placed at the cursor point and you are moved to the end of the document with everything set up for your Endnote. Type in the reference information based on the document style guide you are using.

Working in Draft View, the Notes Pane opens as soon as you insert the Endnote and your cursor is positioned where you can begin typing the reference information. You can return to your document using the same techniques as you would for Footnotes (press F6).

If your document has Endnotes and you press Ctrl + End, you land at the end of the document, 2 lines above the Endnote separator. You can then use the Down Arrow to move into the Endnotes to read them.

The JAWS screen reader will announce Footnote Pane if you are creating Footnotes or Endnote pane if you are creating Endnotes instead of just saying “Notes” Pane. JAWS will also tell you whether you are in a Footnote or Endnote area of your document if you are in Print View.

Moving through Footnotes or Endnotes

There are two ways to move through Footnotes and Endnotes in your documents.

The first is to use the Next Footnote context menu on the References Ribbon.

The keyboard commands are Alt + S, letter O and then:

- N for Next Footnote.
- P for Previous Footnote.
- X for Next Endnote.
- V for Previous Endnote.

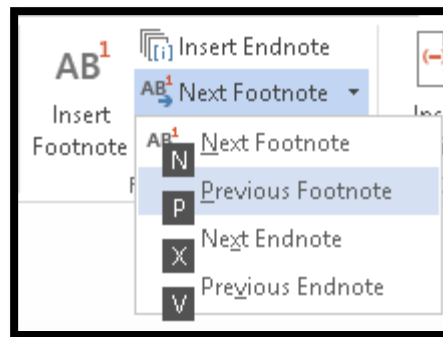


Figure 8 Previous Footnote in References Ribbon.

You can use the Go To dialog (Ctrl + G) to move between Footnotes or Endnotes.

Press Ctrl + G to open the Go To dialog.

Press Shift + Tab to move into the list of document parts that you can go to.

Press F for Footnotes.

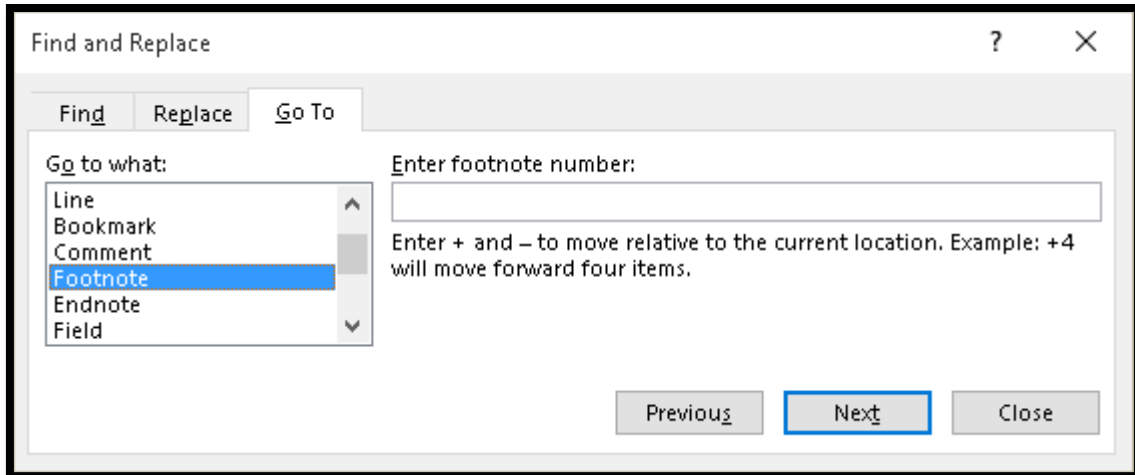


Figure 9 Go To dialog showing Footnotes.

Press Enter and you are moved to the next Footnote in the document. Press Escape to dismiss the Go To dialog and you can use Ctrl + page Up or Ctrl + Page Down to move to the next or previous Footnote or Endnote. Remember to go back to the Go To dialog and choose Page as the item to go to when you are finished reviewing your Footnotes or Endnotes. This will return the default use of Ctrl + Page Up or Ctrl + page Down to moving between pages.

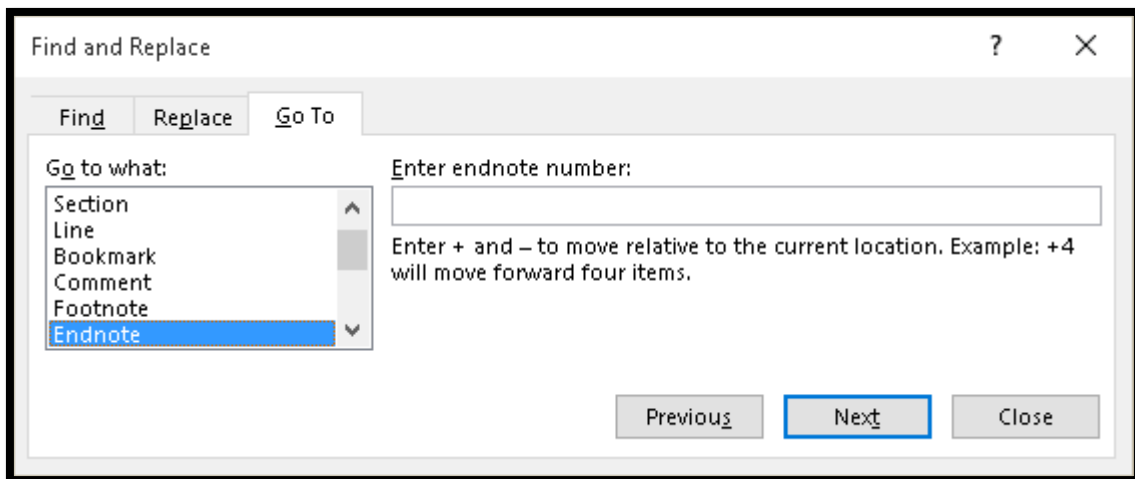


Figure 10Go To dialog showing Endnotes.

The process is the same if you want to move between Endnotes except that in the Go To dialog, you choose to go to Endnotes instead of Footnotes. You can use first character navigation in the list (press F for Footnote or E for Endnote).

Note: If you are using the Up and Down Arrows to review, edit and revise your document, when you get to the end of a page with Footnotes, you will arrow into the Footnotes. If you use Ctrl + Page Up or Page Down to move through your document paragraph by paragraph, you will not land in the Footnotes at the end of the page.,

Copying Footnotes or Endnotes

As you review your document you might want to rearrange content. There might be times when text in one document can be repurposed into another document. You can copy and paste text containing Footnotes or Endnotes around a document or into another document. The reference comes with the Footnote or Endnote and they are set up in their respective positions.

If you do copy Footnotes or Endnotes, review the numbering. If the Footnote or Endnote number is not correct, select it in the document, press the AppKey and choose Update Field (letter U). This should resolve the numbering problem.

Converting Footnotes to Endnotes and Vice Versa

When creating a document, you might find that you started using Footnotes or Endnotes and really need the other. Word lets you convert Footnotes to Endnotes or Endnotes to Footnotes.

Conversion “Bug” To convert Footnotes to Endnotes or Endnotes to Footnotes

Why would I start this topic with a bug? Many of you will open the Notes Options dialog and just choose Footnotes or Endnotes and activate the Conversion button. I found that this results in a lot more work and some finicky workaround troubleshooting.

So here is the bug.

Select a Footnote or Endnote in the main part of the document.

Open the Notes Options dialog by pressing Alt + S, Q. This is faster than trying to target the small icon in the lower right of the Footnotes Group.

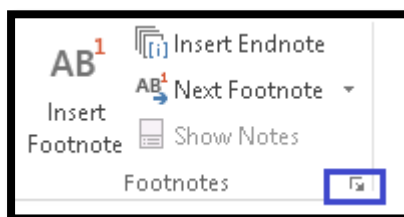


Figure 11 Footnotes Group showing Notes Options button.

When the Notes Options dialog opens, focus is on the Footnotes radio button because this is what you have selected in the document. If your document had Endnotes, the Endnotes radio button would have focus.

Press the Down Arrow to move to Endnotes. Focus is automatically put in the area stating that Endnotes will be at the end of the document.

Press Tab followed by Enter on the Convert button; or, Alt + C to move to and activate the Convert button.

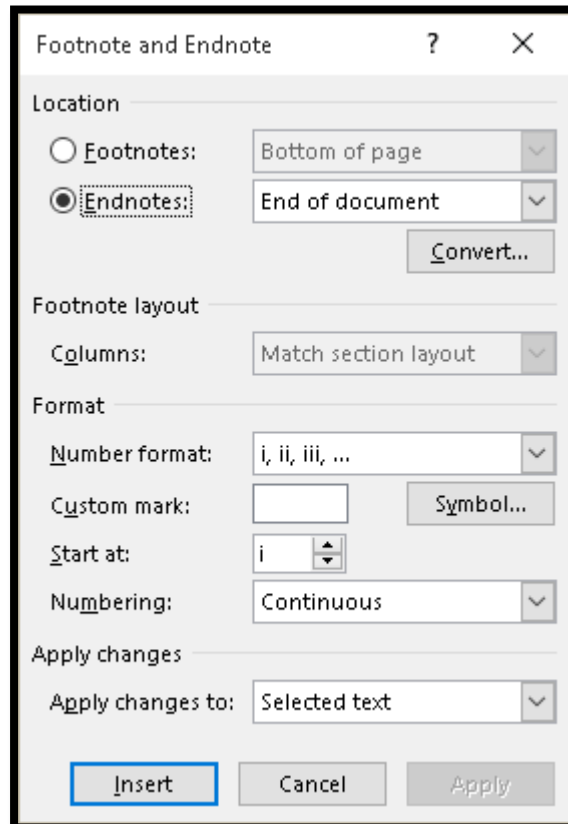


Figure 12 Notes Options dialog showing number format change when Footnotes/Endnotes chosen.

A dialog opens asking you to confirm that you want all of the Footnotes in the document converted to Endnotes. Tab to the OK button and press Enter.

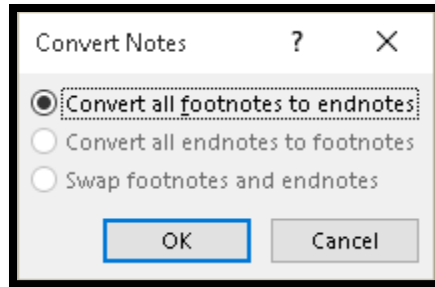


Figure 13 Confirmation of Footnote to Endnote conversion for entire document.

The Footnotes in your document are converted to Endnotes and have been moved to the end of the document.

Current “bug” in that when you do a conversion, your numbering is also converted to Roman numerals and the Footnote/Endnote number is isolated on a line.

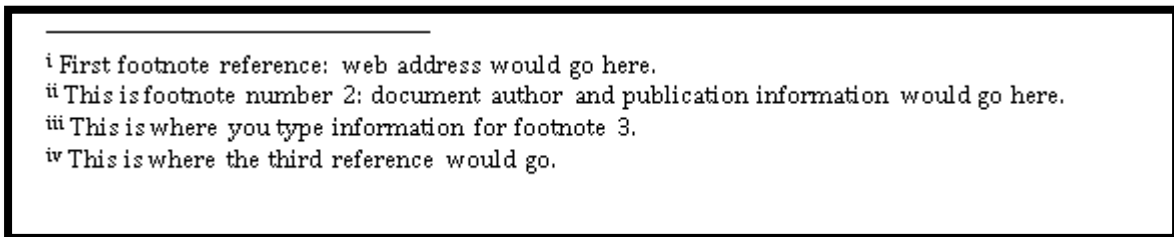


Figure 14 Footnotes converted to Endnotes resulting in Roman Numerals.

You can either try selecting the first Roman Numeral in the main body of the document, pressing Alt + S, Q again to open the Notes dialog and then assigning the correct numbering to the whole document.

What I found when doing this with and without the JAWS screen reader turned on, was that this did change the Roman Numerals to numbers BUT it also put the superscript Footnote or Endnote number on a line of its own.

I hear you! OK, simple, just use the Delete key to remove the paragraph break and bring the pieces of text together.

The problem is that when you do that, the numbers revert back to Roman Numerals.

Usable Process for Footnote/Endnote Conversion

We might also call this the right way for the time being...until the bug gets fixed.

The first part of the process is the same: press Alt + S, Q to open the Notes dialog.

Use the Up and Down Arrow to choose to convert Footnotes to Endnotes or Endnotes to Footnotes.

Press Alt + N to move into the Numbering list and make sure that the numbers are 1, 2, 3...

Press Alt + S to make sure the numbering is going to start at the number 1. Always start this process with the first Footnote or Endnote selected as a point of reference.

Press Alt + P to move to the Apply changes to list and make sure that Whole Document is selected. There are only two options under this setting.

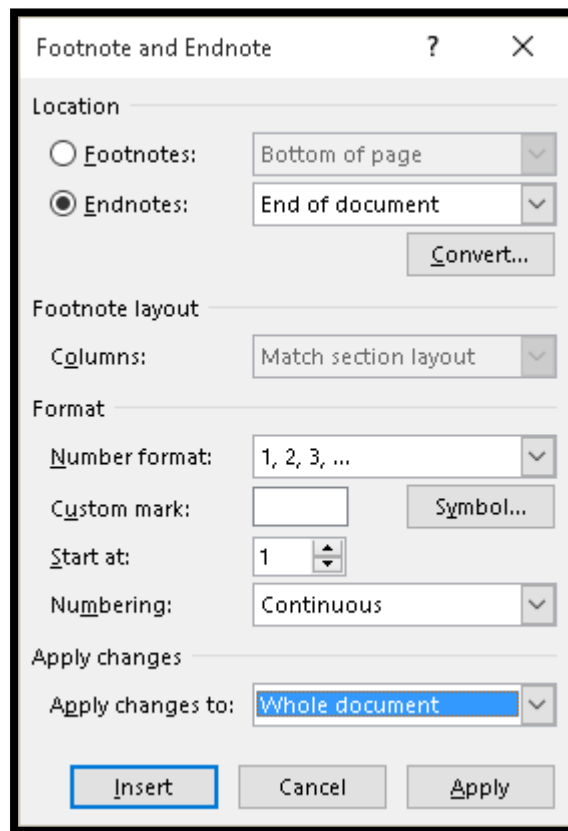


Figure 15 Notes Options dialog showing conversion to be applied to whole document.

Press Alt + C to move to and activate the Convert button. The Notes Options dialog remains open.

You will be asked to confirm the conversion. Even if you say yes, until you then apply the conversion, they will not swap out.

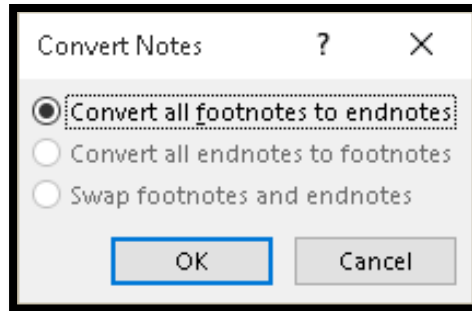


Figure 16 Confirmation of Footnote to Endnote conversion for entire document.

Press Alt + A to Apply the changes and you are returned to your document, the Footnotes have been converted to Endnotes or vice versa and your numbering references are intact.

Changing the Numbering Style of Footnotes or Endnotes

Having worked through the process of converting Footnotes to Endnotes or Endnotes to Footnotes, you are aware of the option to have Footnotes or Endnotes as Roman Numerals or Alphabetical characters.

To change the numbering format, select the first Footnote or Endnote in the main body of your document.

1. Press Alt + S, Q for References Ribbon, Notes dialog.
2. When the Notes dialog opens, press Alt + n to move to and open the Numbering drop down list.
3. Choose the numbering you want.
4. Press Alt + P to move to the list to confirm that you want the change applied to the whole document.
5. Press Alt + A to Apply your changes.

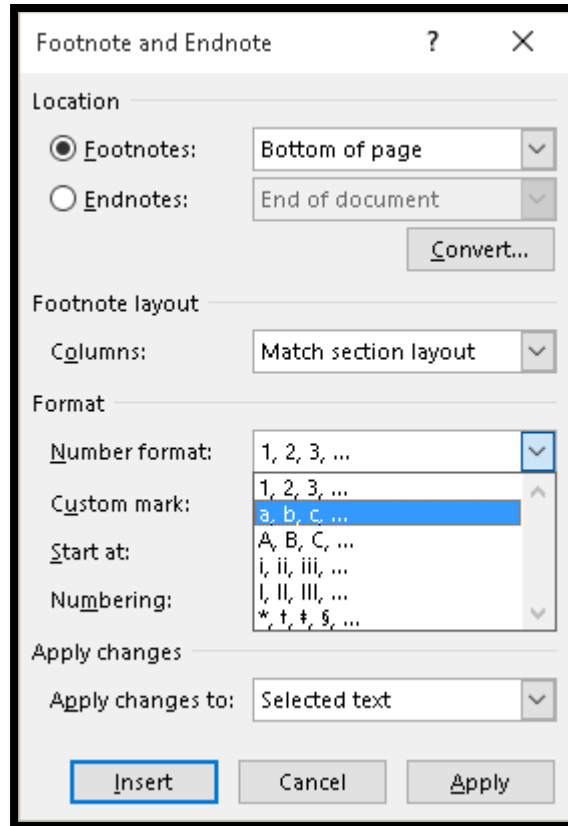


Figure 17 Notes dialog showing numbering options list open.

Do not activate the Convert button when changing the numbering format.

When the Notes dialog closes and you are returned to your document, the Footnotes or Endnotes numbering system has been changed.

...e your point.^A When you click Online Video,
...ou want to add. You can also type a
...fits your document. To make your
...provides header, footer, cover page, and text
...ample, you can add a matching cover page,

To change the way a picture fits
appears next to it. When you w
column, and then click the plus

^A First footnote reference: web address
^B This is footnote number 2: document
^C This is where you type information

Figure 18 Example of Footnotes numbering changed to A, B, C and so forth.

Modifying a Footnote/Endnote Style

Although you can choose from several different document style guides, there might be an instance where you want to change the Styles used for Footnotes and Endnotes.

There are four Styles used for Footnotes or Endnotes:

- Footnote reference.
- Footnote Text.
- Endnote reference.
- Endnote text.

I found that the fastest way to modify one of the Footnote or Endnote Styles is to select it in your document and open the Apply Styles Pane (Ctrl + Shift + S).

This ensures that the Style will be in the Apply Styles Pane and you won't have to search for it. The other advantage is that despite being a Style that is "hidden until first used" I can't locate it in the Styles Pane even with Footnotes or Endnotes in the document.

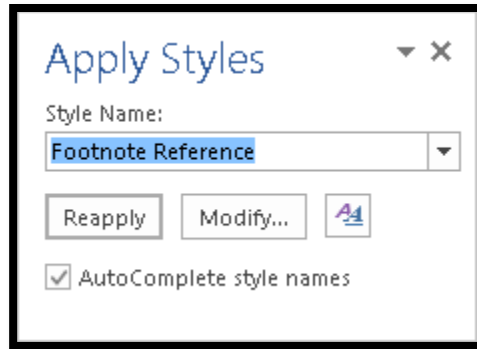


Figure 19 Apply Styles Pane showing the Footnote Reference Style.

When you activate the Modify button by tabbing to it and pressing Enter, the Modify Style dialog opens (we've seen this in other tutorials) and you can make changes to the Footnote or Endnote Style.

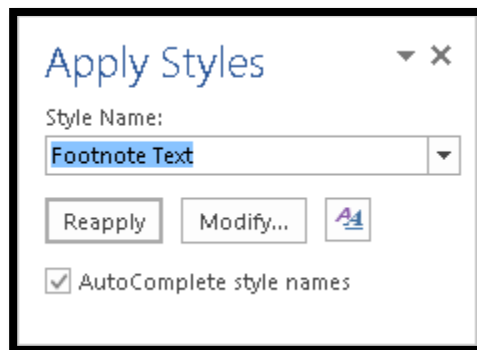


Figure 20 Apply Styles Pane showing the Footnote Text Style.

Be careful! Remember the purpose of the Footnote or EndNote is to be unobtrusive in a document and not overwhelm the content.

As with other Styles you work with in the Modify Style dialog, you can choose to have the changes apply to the current document or other documents based on this document template.

Changing the Footnote or Endnote Separator

The line used as a separator for Footnotes and Endnotes can be changed if the document style guide dictates something different. Of course it can also be changed just because you want to change it.

This process is accessible using the keyboard and/or a screen reader, but you need to focus on where you are and what you're doing.

1. Switch to draft View and show the Notes Pane (Alt + S, H).

2. Focus is in the Notes Pane. If the Notes Pane is already visible, press F6 to put focus on it.
 - a. If you are using a screen reader, you should hear the last Footnote or Endnote you entered.
3. Press Shift + Tab to move into the drop down list of what is shown in the Notes Pane. The default is to show All Footnotes.
4. Choose Footnote Separator from the drop down list and press Enter.
5. Focus is in the Notes Pane at the beginning of the Footnotes separator.
6. Press Shift + End to select the entire line. The line separator is about two inches in length in your document (to give you an idea of what it looks like) and is thin.
7. Press the Delete key to remove the thin line as a Footnote separator.

You can now type any character, for example, asterisks (star) or use the Underline split-button on the Home Ribbon to customize a double line.

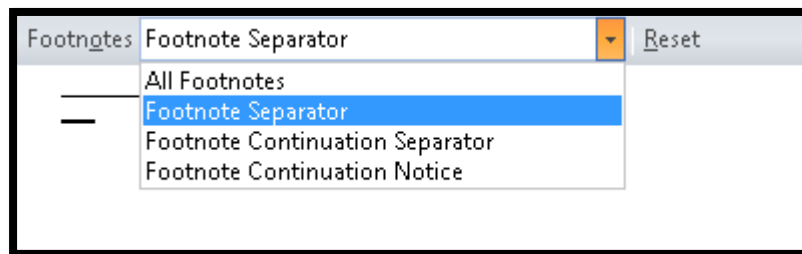


Figure 21 Footnote Separator in drop down list in Notes Pane.

You can leave the Footnote separator empty which would have no visual separator between your document and the Footnotes. Not having any separator will create a barrier to accessibility as there is no visual cue that the main document content has been left to enter the Footnotes area. Although the font size might be smaller for Footnotes, someone using screen magnification, for example, may miss the threshold for Footnotes and think they are still in the main document content. This barrier isn't as great if you are using Endnotes, but it is something to consider when creating your document template and choosing no separators.

To change the way a picture fits in your document, click it and a button for layout options appears next to it. When you work on a table, click where you want to add a row or a column, and then click the plus sign. Reading is easier, too, in the new Reading view. You

¹ First footnote reference: web address would go here.

² This is footnote number 2: document author and publication information would go here.

³ This is where you type information for footnote 3.

Figure 22 Footnote separator using a heavy wavy underline in blue.

While you are in the Footnote separator in the Notes pane, there is a Reset button. It is not available until you do something to the Footnotes Separator that may require a reset. You can Shift + F6 to the drop down list of options for the Notes Pane and then use the equivalent of the mouse cursor for your adaptive technology to move to the right of the drop down list. You will hear the letter R and if you continue, you'll hear the rest of the word Reset. Use the mouse equivalent of a mouse click to activate the button.

Note: Even though the Reset button has a keyboard command (Alt + R), I can't get it to work with or without the JAWS screen reader running. This is why I suggest the mouse equivalent be used.

Deleting Footnotes or Endnotes

It is easy to delete a Footnote or Endnote. Simply select the superscript number in your document and press Delete. The Footnote or Endnote number is removed as well as the reference information for that Footnote or Endnote.

The numbering of Footnotes or Endnotes after the one you removed should adjust themselves to be sequential.

If you notice that a Footnote or Endnote has not updated after you delete another Footnote or Endnote, select the Footnote or Endnote that is out of sequence, press the AppKey and choose Update Field (U). The Footnote or Endnote field you selected should now fall into line sequentially with the one before and after it. Check the next Footnote or Endnote to make sure it also adjusted itself to be sequential.

If you simply delete the text for the Footnote or Endnote, the number will remain in your document. The best way to ensure that all aspects of the Footnote or Endnote are removed is to select the Footnote or Endnote number in the main body of your document and press Delete.

Customizing the Underline Button (Home Ribbon)

I mentioned in this tutorial that you can create a custom underline for your documents. This is something separate from the Ctrl + U keyboard command. The changes you make to the Underline Style affect the current document only and are only available while you are in the current document. If you close the current document and reopen it, you'll have to redo the changes you made to the Underline Style. This is the only place you can modify the Underline Style. It is not a Style in the Styles Pane or otherwise visible in the document.

The sample change in the Footnote separator took advantage of being able to change the Underline attributes.

To change the Underline attributes in a document:

Press Alt + H, 3 to open the Underline split-button and reveal the Underline Gallery.



Figure 23 Underline Gallery from the Home Ribbon.

The default status of the Underline button is to insert a thin underline when the button is clicked by a mouse.

You can change the Underline colour by pressing Alt + H, 3, U; or look at More Underlines by pressing Alt + H, 3, M.

Note: There is currently a bug with split-buttons in Office. You have to manually Tab to the corresponding button to use the changes made to the underline attributes. I'll cover this shortly.

If you want to modify the colour of the Underline, once you press Alt + H, 3, U, the colour palette opens and you can choose a colour.

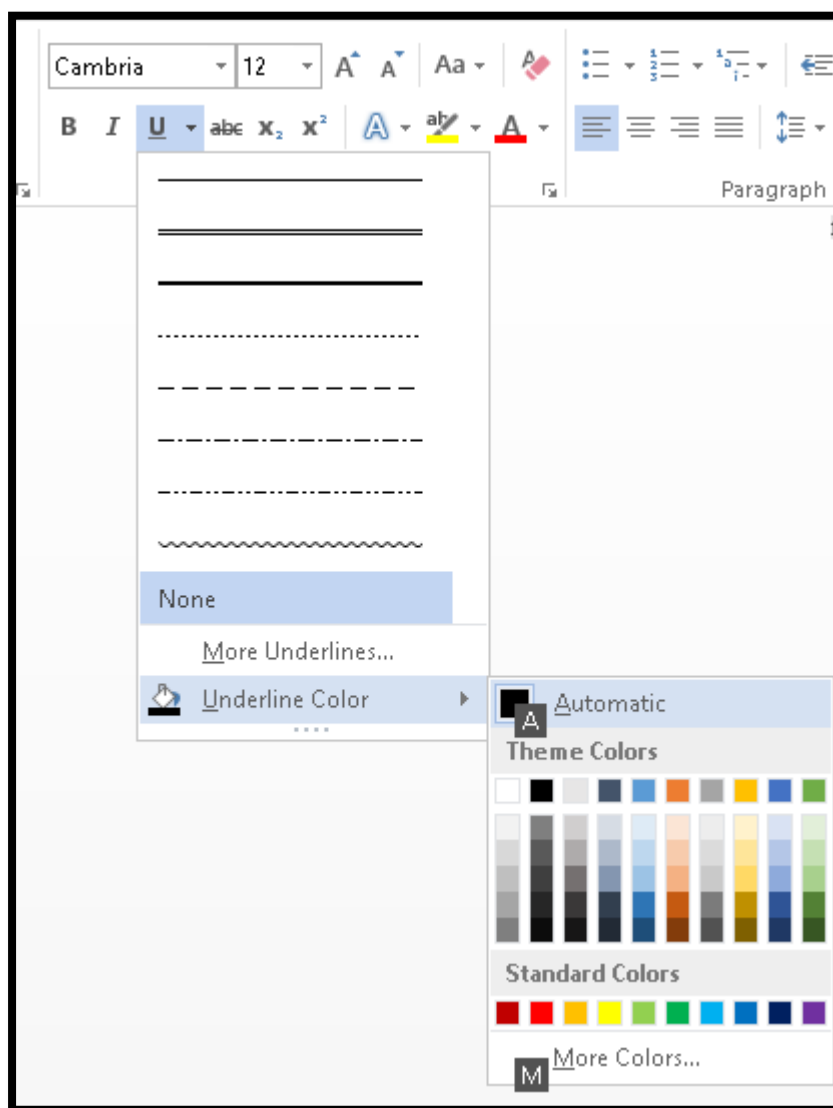


Figure 24 Colour palette for changing the Underline colour.

If you choose Alt + H, 3, M, for More Underline, The Font dialog opens and the Underline list is open for you to choose the Underline Style you want. You could then apply a colour to the Underline in the Font dialog. The Underline colour palette is to the right of the Underline Style list...so pressing Tab will move you there once you choose an Underline Style.

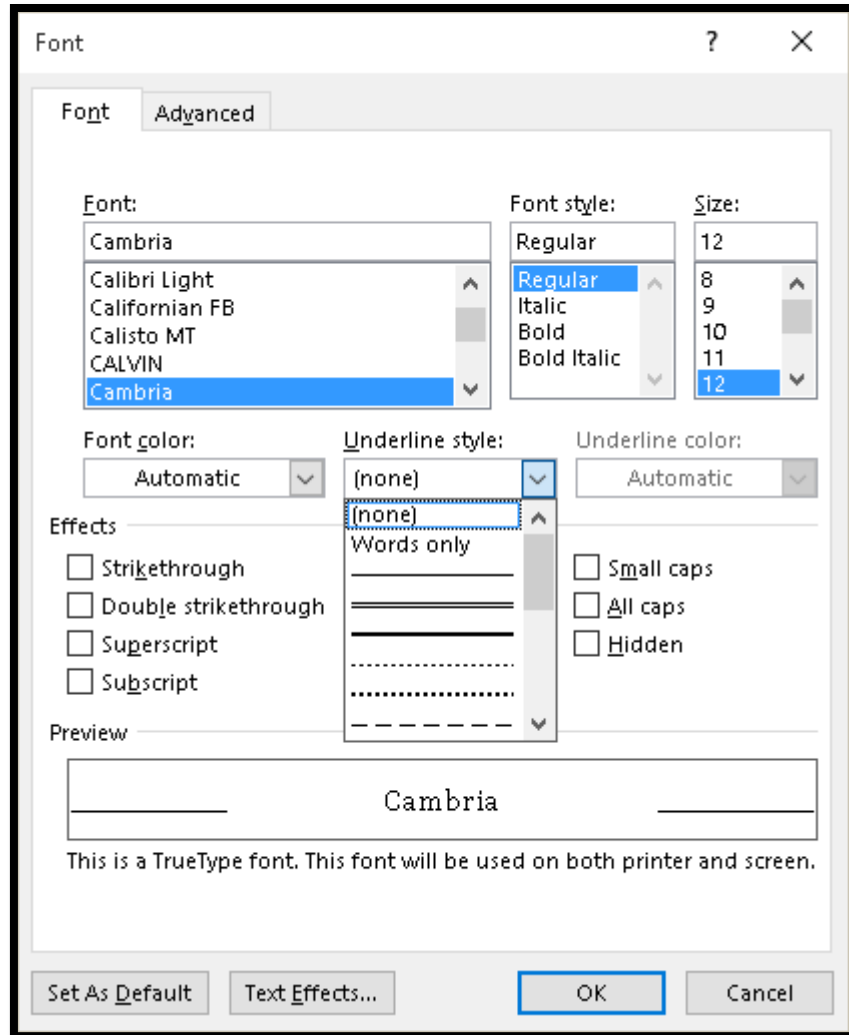


Figure 25 Font dialog with Underline options drop down list open.

This paragraph has some samples of what you can do with the Underline button on the Home Ribbon. As I say, whatever you do to underline using the Underline Gallery, using Ctrl + B will result in the default Underline. You must click the Underline button on the Home Ribbon (or use the mouse equivalent) in order to use the custom Underline.

In having fun with the previous paragraph, I discovered that using the Font dialog to choose a different Underline and colour didn't stick when I then used the Underline button. However, if I chose the Underline from the Underline Gallery and then went back to choose a colour (Alt + H, 3, U) the changes stuck when I activated the Underline button using the mouse or mouse equivalent.

I also found that the change in Underline attributes DID transfer to other documents as long as I had Word open. However, once I completely closed Word and relaunched it, the Underline went back to the default. Have fun!

Contact Information

You can [contact Karen McCall](#) with any questions about this how to booklet or any suggestions for others. Visit the [Karlen Communications web site](#) for more how to booklets!