

# **Karlen Communications Citations and Bibliography in Word**



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## **Introduction**

This tutorial is the handout for the third week of an EASI (Equal Access to Software and Information) four part series on advanced features in Word including keyboard commands, tips and techniques for those of us using adaptive technology such as screen readers.

Not to worry, there are plenty of step-by-step instructions for those of you who are new to this topic and want to learn more about Citations and Bibliographies in Word documents or who didn't attend the webinar series.

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 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.

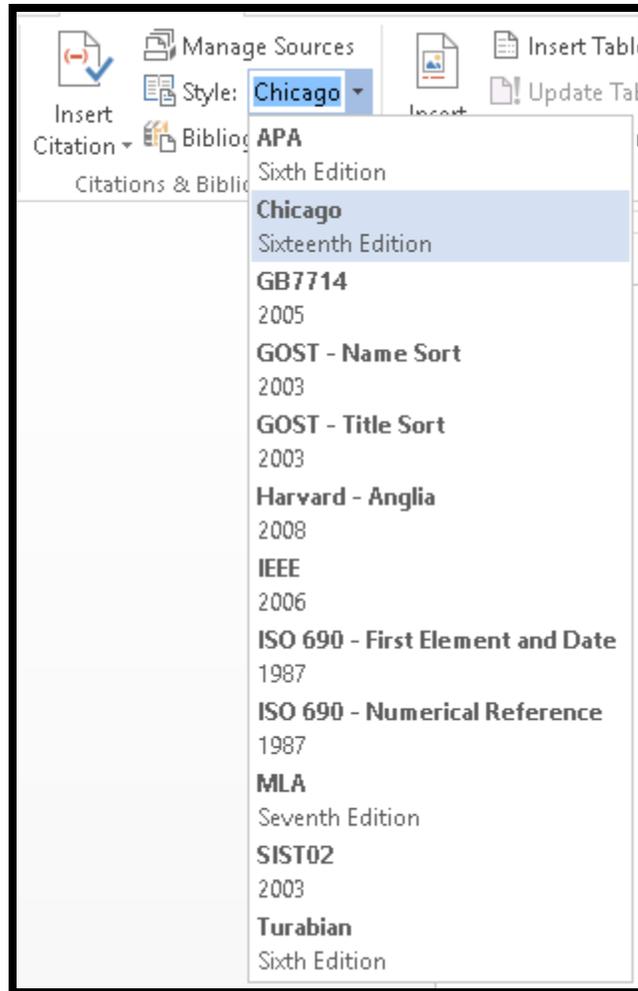


Figure 1 List of document style guides from Reference Ribbon.

## 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.

Video provides a powerful way to help you prove your point (Sustainable Cities Collective 2014). 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. Click Insert and then choose the elements you want from the different galleries.

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 write 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.

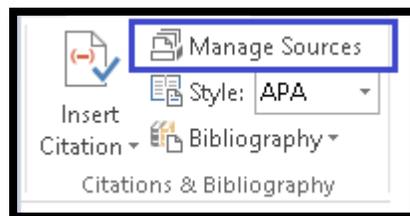


Figure 3 Manage Sources button on the Reference Ribbon.

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.

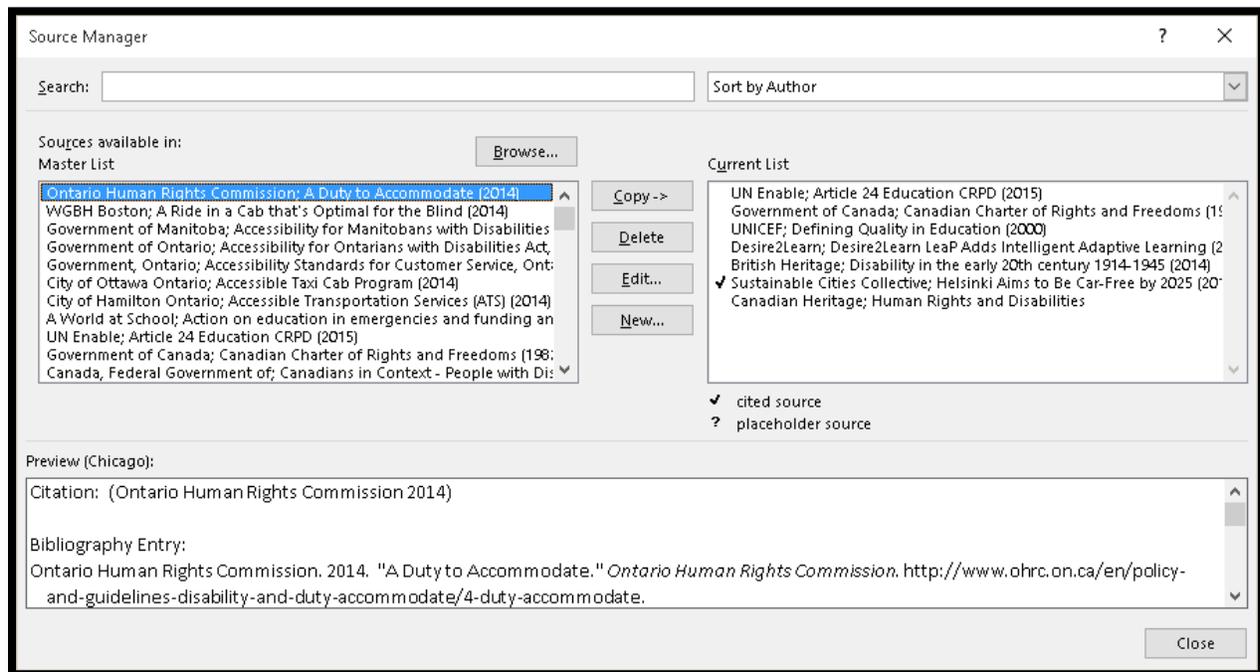


Figure 4 Master List dialog for sources.

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.

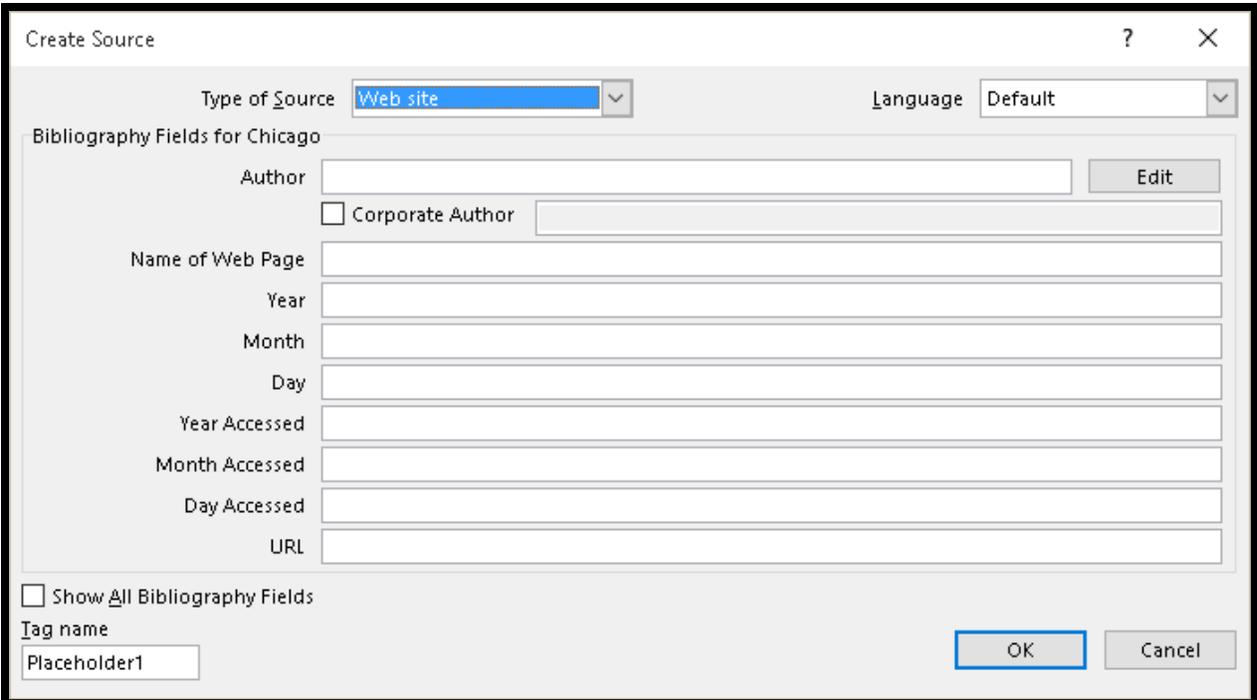
Until you cite a source in the current document, there are no check marks in the list of sources available for the current document.

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.



The image shows a 'Create Source' dialog box with the following elements:

- Title bar: 'Create Source' with help and close icons.
- Top row: 'Type of Source' dropdown menu (selected: 'Web site') and 'Language' dropdown menu (selected: 'Default').
- Section: 'Bibliography Fields for Chicago' containing:
  - 'Author' text box with an 'Edit' button.
  - 'Corporate Author' checkbox and text box.
  - 'Name of Web Page' text box.
  - 'Year', 'Month', 'Day', 'Year Accessed', 'Month Accessed', and 'Day Accessed' text boxes.
  - 'URL' text box.
- Bottom row: 'Show All Bibliography Fields' checkbox, 'Tag name' text box (containing 'Placeholder1'), and 'OK' and 'Cancel' buttons.

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.

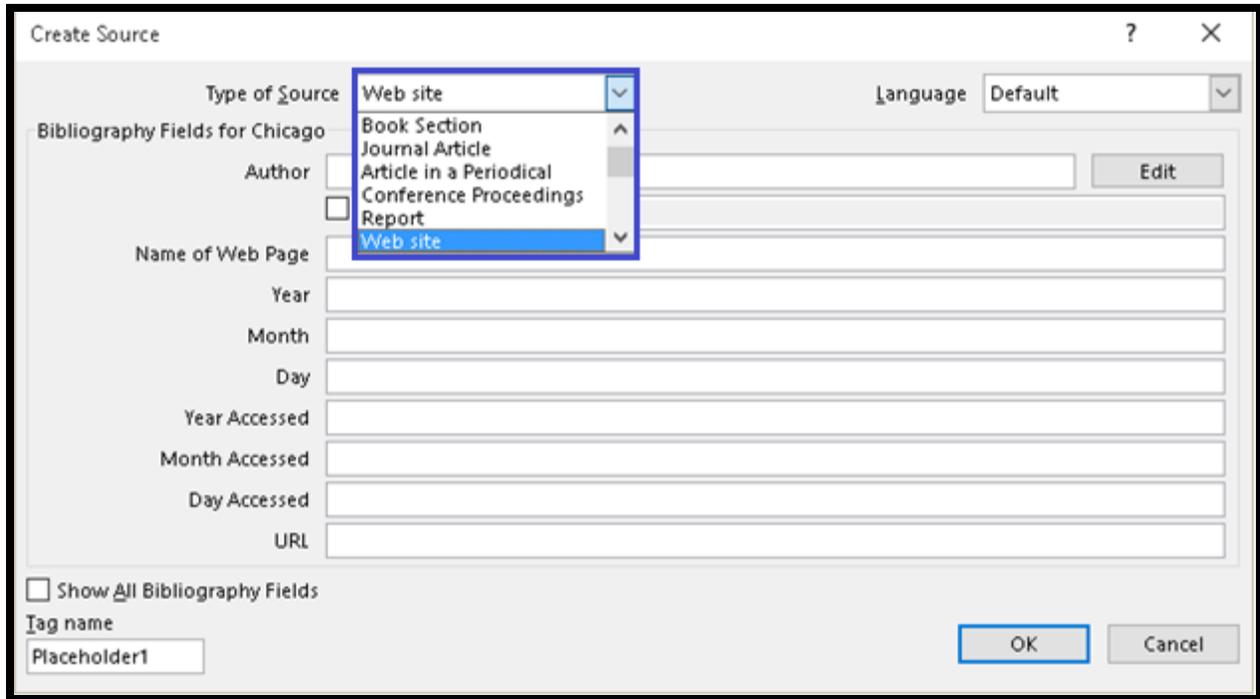


Figure 6 Create Source dialog showing types of sources you can add.

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.

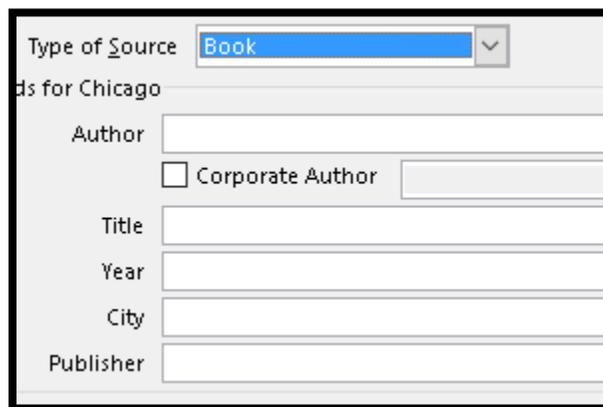


Figure 7 Create Source fields for Book source.

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.

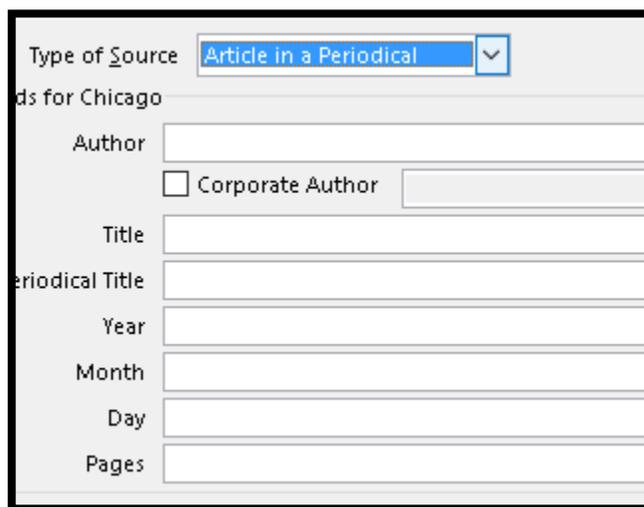
The image shows a screenshot of a software dialog box titled 'Create Source'. At the top, there is a dropdown menu labeled 'Type of Source' with 'Article in a Periodical' selected. Below this, the text 'Style for Chicago' is partially visible. The main area contains several input fields: 'Author', 'Corporate Author' (with an unchecked checkbox), 'Title', 'Periodical Title', 'Year', 'Month', 'Day', and 'Pages'. Each field is represented by a rectangular text box.

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.

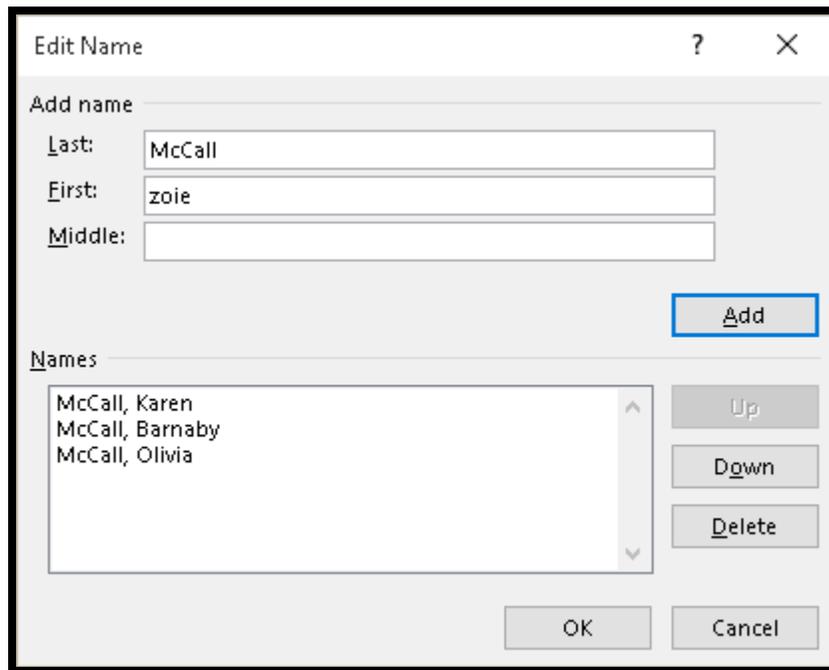


Figure 9 Edit Name dialog showing multiple authors.

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.

The image shows a 'Create Source' dialog box. At the top, there are two dropdown menus: 'Type of Source' set to 'Web site' and 'Language' set to 'Default'. Below these is the section 'Bibliography Fields for Chicago'. The 'Author' field is highlighted with a blue border and contains the text 'McCall, Karen; McCall, Barnaby; McCall, Olivia; McCall, zoie;'. To the right of this field is an 'Edit' button. Below the 'Author' field is a 'Corporate Author' checkbox and an empty text field. Further down are several empty text fields for 'Name of Web Page', 'Year', 'Month', 'Day', 'Year Accessed', 'Month Accessed', 'Day Accessed', and 'URL'. At the bottom left, there is a checkbox labeled 'Show All Bibliography Fields'. Below that is a 'Tag name' field containing 'McC' and an example text 'Example: Kramer, James D; Chen, Jacky'. At the bottom right are 'OK' and 'Cancel' buttons.

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, the section 'Bibliography Fields for Chicago' is expanded, displaying a list of input fields. The fields are: Author (marked with a red star), Corporate Author (with an unchecked checkbox), Title (marked with a red star), Editor, Pages (marked with a red star), Year (marked with a red star), Conference Publication Name (marked with a red star), City (marked with a red star), Publisher (marked with a red star), Volume, Short Title, and Standard Number. At the bottom of the dialog, there is a checkbox labeled 'Show All Bibliography Fields' which is checked, and a legend indicating that a red star symbol represents a '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.

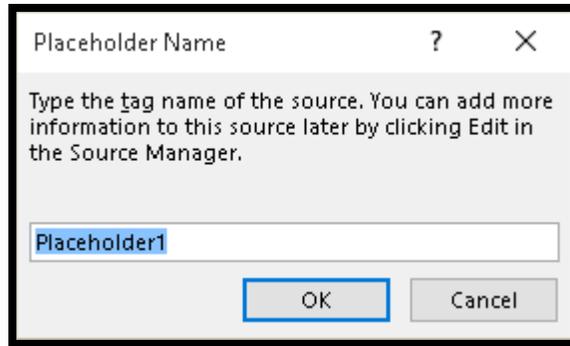


Figure 14 Placeholder Name dialog.

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

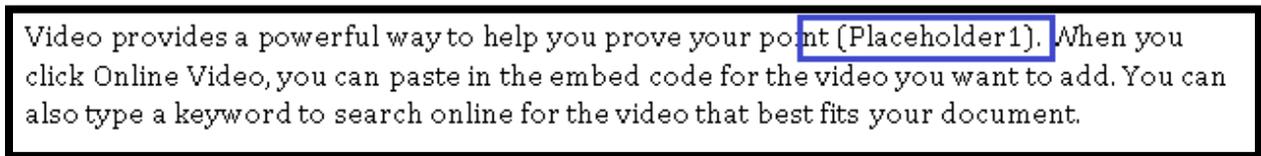


Figure 15 Temporary Placeholder source in document.

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.

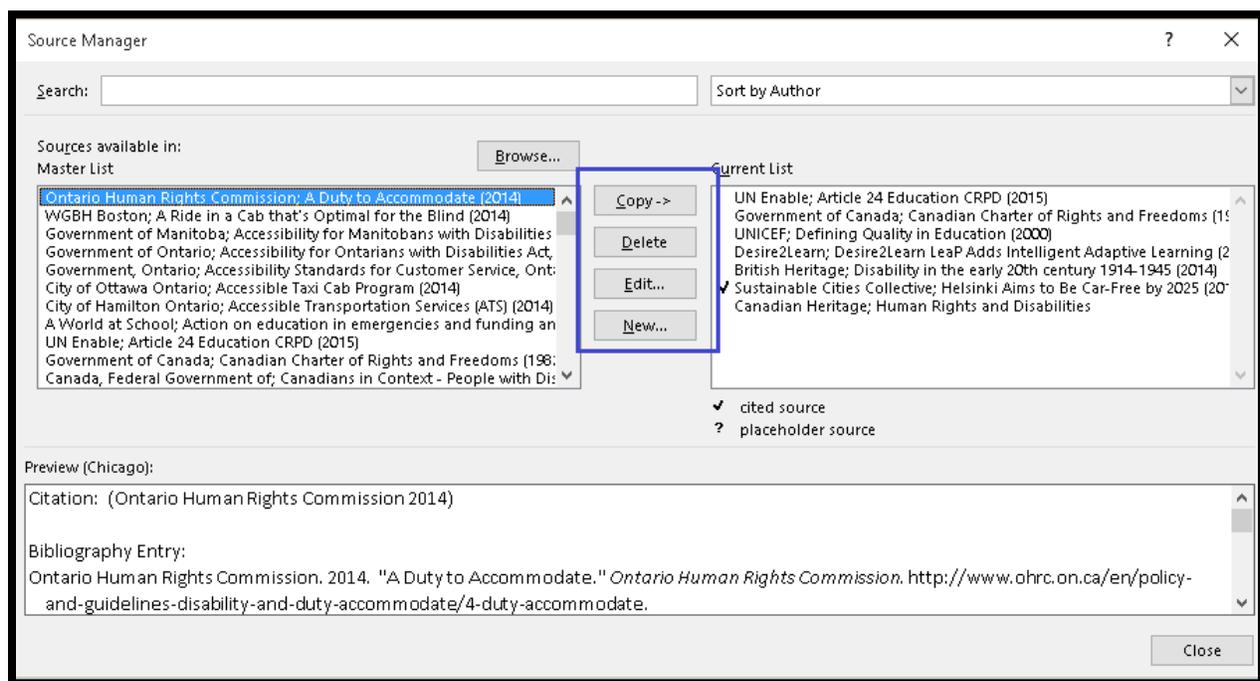


Figure 17 Master List dialog showing buttons in centre of the dialog.

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.

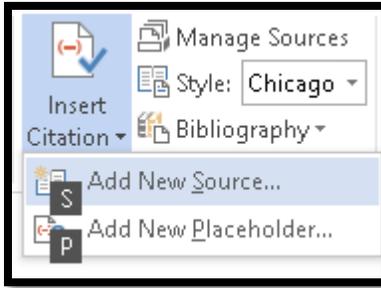


Figure 18 Insert Citation when there are no sources available in the current document.

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.

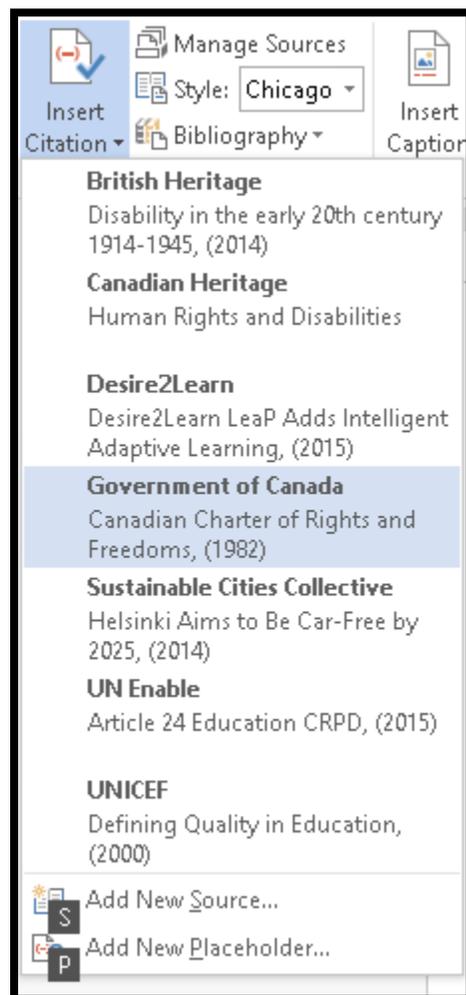


Figure 19 List of sources that can be cited in a specific document.

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.

# Bibliography

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.

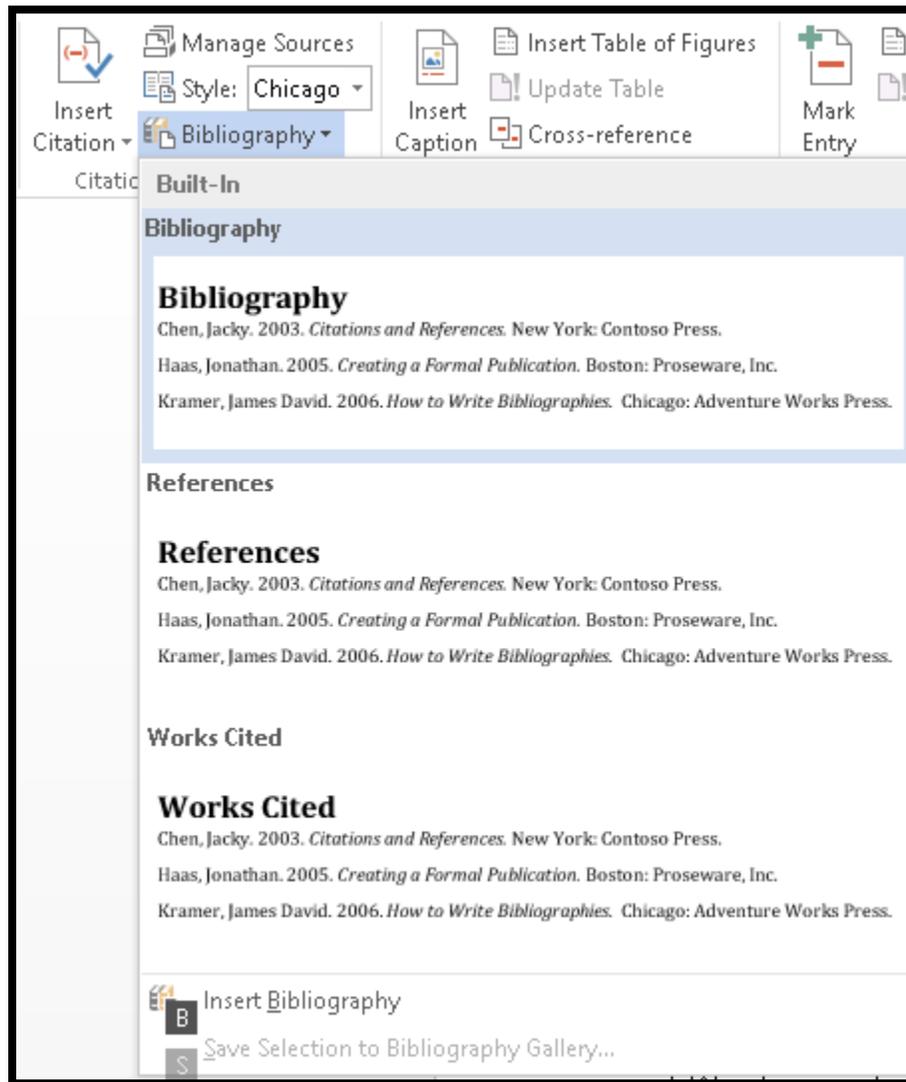


Figure 20 Insert Bibliography Gallery in the References Ribbon.

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.

## Bibliography

Text

British Heritage. 2014. "Disability in the early 20th century 1914-1945." *British Heritage*.  
<http://www.english-heritage.org.uk/discover/people-and-places/disability-history/1914-1945/>.

Canadian Heritage. n.d. "Human Rights and Disabilities." *Government of Canada*.  
<http://www.pch.gc.ca/pgm/pdp-hrp/canada/abl-eng.cfm>.

Desire2Learn. 2015. *Desire2Learn Leap Adds Intelligent Adaptive Learning*.  
[http://www.knowillage.com/leap\\_d2l.html](http://www.knowillage.com/leap_d2l.html).

Government of Canada. 1982. "Canadian Charter of Rights and Freedoms." *Government of Canada*. June. <http://www.efc.ca/pages/law/charter/charter.text.html>.

Sustainable Cities Collective. 2014. "Helsinki Aims to Be Car-Free by 2025." *Sustainable Cities Collective*. 07 28.  
<http://sustainablecitiescollective.com/dirt/297026/helsinki-aims-be-car-free-2025>.

UN Enable. 2015. *Article 24 Education CRPD*.  
<http://www.un.org/disabilities/default.asp?id=284>.

UNICEF. 2000. *Defining Quality in Education*. June.  
<http://www.unicef.org/education/files/QualityEducation.PDF>.

Figure 21 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.

## **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!