Microsoft

Microsoft Office Inside OUT

(Office 2021 and Microsoft 365)

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Using cross-references

Complex documents often require you to provide readers with the capability to quickly reference other information in the document that is pertinent to the text they are currently reading. This is where cross-references are essential. Cross-references are notations in the document that tell the reader where to find additional information on a particular subject matter. Cross-references are essentially navigation mileposts within the document that make it easy for the reader to follow the information trail related to a particular topic referenced more than once in the document.

Word's cross-referencing capability is extremely flexible. You can create cross-references associated with a heading, figure, table, or bookmark. Any bookmarked text can serve as a cross-reference. The cross-reference can give you page number information or can reference a particular table or figure number.

The great thing about cross-references is that they react to changes in the document. For example, if you move a figure noted by a cross-reference to another location in the document and renumber it, the cross-reference updates to provide the correct figure number. If text is rearranged in the document and headings associated with cross-references move, the cross-references update to provide the correct page numbers for the cited headings.

Creating a cross-reference is really a two-step process. First, you supply the anchor for the cross-reference. As already mentioned, this can be a table, an equation, or a figure that has been assigned a caption. Other possibilities are as follows:

- **Numbered Item:** Text in the document that has been numbered using the Numbering command.

- **Heading:** Text headings that have been assigned one of Word's built-in heading styles.

- **Bookmark:** Any text that has been assigned a bookmark. (We discuss bookmarks later in this chapter.)

- **Footnote:** Any footnote that you have placed in the document.

- **Endnote:** Any endnote that you have placed in the document.

CAUTION

If you want to create cross-references for tables, figures, or equations, you must use the Caption tool to assign captions to your tables, equations, or figures. The caption provides the cross-reference with the information needed to locate the figure or table and specify the figure or table number.

To create a cross-reference, place the insertion point in the document where you want to insert the cross-reference. Type the introductory text for the cross-reference, such as "For more information, see page."

Select the ribbon's References tab and then click the Cross-Reference command in the Captions group, which opens the Cross-Reference dialog box.

Select the Reference type for the cross-reference (such as Heading, Bookmark, Figure, and so on). The items available in the list box reflect the reference type you selected. For example, if you select Heading as the reference type, all the headings (that have been assigned Heading Quick Styles) in your document appear in the For Which Headings box, as shown in Figure 10-10.

After you select the reference type and the item in the document that you want to be connected to the cross-reference (such as a heading or bookmark), you need to determine the content of the cross-reference itself. For example, you can use a heading as the reference anchor and select Page Number in the Insert Reference To drop-down menu. This inserts the page number for the referenced heading into the document as your cross-reference.

Each reference type has choices for what you insert into the document as the cross-reference. A figure reference type can provide the entire caption, the label and number, or the page number for a figure. A bookmark used as a cross-reference can include the bookmark text, the page number of the bookmark, or even the paragraph number. After you select your options for the cross-reference in the Cross-Reference dialog box, click Insert. You add additional cross-references as needed using the Cross-Reference dialog box. When you are finished, click the Close button on the Cross-Reference dialog box.
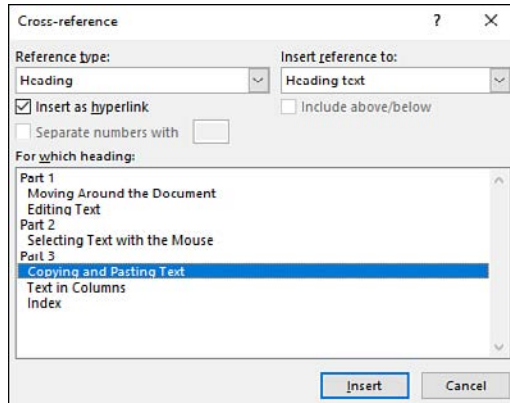
Figure 10-10   The Cross-Reference dialog box

To follow a cross-reference (go to the referenced text or heading) that you inserted as a hyperlink (the default), place the mouse pointer on the cross-reference text. A Ctrl + Click To Follow Link message box appears. Hold down the Ctrl key and click the cross-reference; you will "jump" to the location of the cross-reference in your document.

Generating an index

An index provides a list of important terms, keywords, and various content references from a document and provides a reference to the page number where each of these terms or keywords appear in the document. Generating an index in Word is similar to creating a table of contents or a table of figures. First, you need to mark the index entries and then generate the index.

TIP

To view the field codes placed in a document when you insert cross-references, press Alt+F9. Press Alt+F9 again to hide the cross-reference fields.

The commands that you will use to create your index are found in the Index group on the ribbon's References tab. As already mentioned, the first step in creating the index is to mark the various index entries throughout the document.

NOTE

Indexes are meant to contain key terms and major concepts in the document so that the reader of the document can quickly locate that information in the document; don't commit overkill when marking text entries for the index, and don't completely skimp on entries for the index. It is a *Goldilocks and the Three Bears* dilemma: The index needs to be "just right."

Marking index entries

Start at the beginning of your document and select the first text entry for the index; then select Mark Entry (in the Index group on the ribbon) to open the Mark Index Entry dialog box. The selected text appears in the Mark Index Entry dialog box's main entry box, as shown in Figure 10-11. You don't have to use the default text in the main entry box; you can type over the text to revise the main entry.

If you want to create a subentry to accompany the main entry in the index, type the text in the Subentry field. For example, if your index entry is footnotes, but the index actually points to a passage that discusses converting footnotes to endnotes, you can add the subentry of "converting to endnotes." The index entry in the index then contains "footnotes" followed by an indented "converting to endnotes" on the next line (which would also include the page number of the entry).
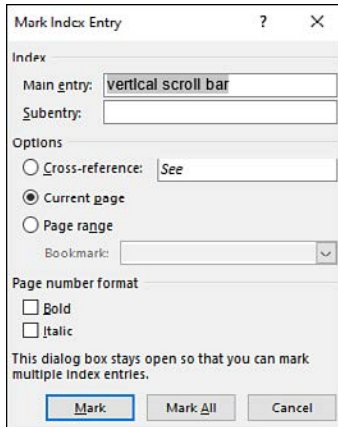
Figure 10-11   The Mark Index Entry dialog box

By default, the index entry includes the page number (the page where your index entry actually resides in the document). You can also specify a page range for the index entry by selecting the Page Range option button and supplying the name of a bookmark you created that includes the page range you want to assign to the index entry.

> ➤ **Bookmarks are discussed later in this chapter in the "Building a better 'big' document" section.**

The Mark Index Entry dialog box also provides an option for creating a cross-reference for the index entry. Suppose the main entry is "data source," and you want to include a cross-reference in the index entry that states, "See mail merge." To use the cross-reference option, select the Cross-Reference option button and enter the required text. This type of entry does not include a page number reference, but it is designed to have the reader look elsewhere in the index to locate the document information.

The Mark Index Entry dialog box also supplies two check boxes (Bold and Italic) that enable you to select formatting for the page numbers included with the index entries. After you specify the parameters for your index entry, select Mark. Because the dialog box stays open as you mark the various index entries for the document, you can mark additional entries and then click Close when you finish marking all the index entries in the document.

Inserting the index

After marking your index entries, you can insert the index. Park the insertion point in the document where you want to insert the index. You might want to start a new page or even a new section at the end of the document for the index.

To insert the index, click the Insert Index command in the Index group. The Index dialog box opens, as shown in Figure 10-12.
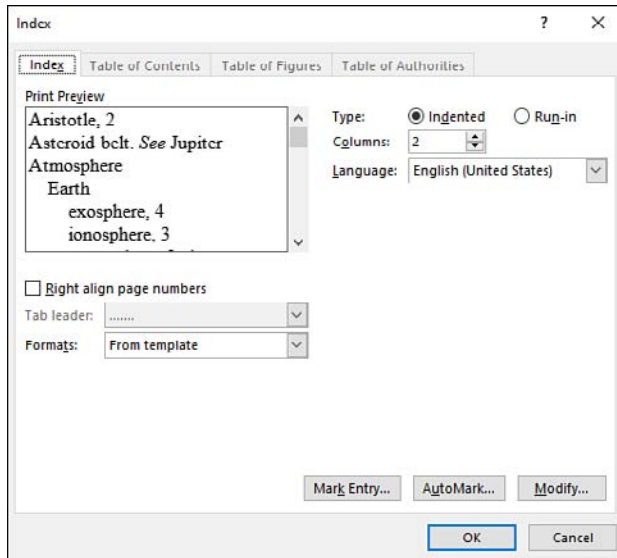
Figure 10-12   The Index dialog box

By default, the index is set up indented and in two columns. You can change the number of col-
umns and other settings as needed using the controls on the right side of the Index dialog box.
When you are ready to insert the index, select OK. The index is inserted into the document.

If you modify your document (move pages, delete pages, or insert additional pages) and mark
additional entries for the index, you need to update the index in your document. Select the
Update Index command in the Index group to update the index.

TIP

**If you want to go beyond the main entry and subentry levels and add a tertiary-level
entry to the index, type a colon (:) after the subentry text and then enter text for the
tertiary-level index information.**

NOTE

**Different style manuals exist for different kinds of publications. Word provides citation
and bibliography formatting for 12 different sets of style guidelines, including the Mod-
ern Language Association (MLA), the American Psychological Association (APA), and the
Chicago Manual of Style.**

Working with citations and bibliographies

Suppose you are working on a journal article, a paper for conference proceedings, or some other document that requires a list of your sources at the end of the document. In that case, you can take advantage of Word's citation and bibliography features. Citations are short references to articles, papers, books, or other material that you consulted that appear directly in the text of your document. For example, if you need to cite an article you read that was written by Kim Akers in 2021, the citation in the document would appear directly after any reference that you have made to Aker's article. A format that the citation might appear in could be as follows: (Akers, 2021).

The full reference for the article, including the author's name, the article title, the publication date, and the publication in which the article appeared, will be provided in the bibliography itself. As the "keeper" of the citations, the bibliography is a comprehensive list of all the resource materials you have referenced in your document.

When you insert a citation into the document (that is, when you create the citation), you provide all the information related to the article or book, such as the title, author, date published, and so forth. When you generate the bibliography, the bibliography entries created for each of the publications cited are based on the information that you provided for each of your citations (meaning your cited references).

Before you begin to insert the citations into the document, make sure that you understand the style guidelines you use for your publications. Style guides supply the rules for citing other works in your documents. For example, many educational institutions use the MLA style guidelines in the humanity disciplines and the APA style guidelines for the social sciences. Other groups, such as many book publishers, use *Chicago Manual of Style* as a resource for their writers.

The first step in the citation-to-bibliography process is choosing the style guidelines for your citations and bibliography. All the commands you need to create citations and the bibliography are on the ribbon's References tab in the Citations & Bibliography group.

To specify the style guidelines that you want, select the Style drop-down menu and select one of the listed styles. (The default is APA.) Now you can begin to create the citations for the document.

Creating citations

Citations include all the information related to the publication you are citing in your document. Park the insertion point at the end of a sentence where you want to insert the citation, and then follow these steps:

1. Select the Insert Citation command in the Citations & Bibliography group.

2. On the Insert Citation menu, select Add New Source. The Create Source dialog box opens (see Figure 10-13).