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# Advanced functions in Word: References and Table of Contents

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# Introduction to References and Document Navigation

## **Why References Matter in Engineering Documentation:**

Professional technical documents require systematic organization, proper attribution of sources, and easy navigation through complex content. Reference features in Word enable creation of academic-quality documentation meeting institutional and industry standards.

## **Key Reference Features in MS Word:**

- **Table of Contents:** Automatic navigation structure based on heading styles
- **Citations and Bibliography:** Proper attribution of research sources
- **Footnotes and Endnotes:** Additional information and source references
- **Cross-References:** Internal document links to figures, tables, and sections
- **Captions:** Numbered labels for figures, tables, and equations
- **Index:** Alphabetical listing of key terms with page numbers
- **Bookmarks and Hyperlinks:** Quick navigation within documents



# Introduction to References and Document Navigation

## **Importance for Engineering Students:**

- Meet academic requirements for lab reports and research papers
- Create professional technical documentation
- Facilitate document navigation in lengthy reports
- Ensure proper attribution and avoid plagiarism
- Develop skills required in professional engineering practice



# Understanding Document Structure and Navigation

## **Document Hierarchy and Organization:**

Well-structured documents use consistent heading levels to create logical organization:

- **Heading 1:** Major sections (Introduction, Methodology, Results, Conclusion)
- **Heading 2:** Subsections within major sections
- **Heading 3:** Detailed topics within subsections
- **Body Text:** Content paragraphs using Normal style

## **Navigation Pane:**

- **Access:** View tab → Show group → Navigation Pane (or Ctrl+F)
- **Headings View:** Displays document outline based on heading styles
- **Pages View:** Thumbnail preview of all pages
- **Results View:** Search results within document
- **Benefits:** Quick navigation in long documents, drag-and-drop section reordering



# Understanding Document Structure and Navigation

## **Document Map:**

The Navigation Pane creates an interactive document map showing hierarchical structure, enabling instant navigation to any section with single click.

## **Prerequisites for Automatic Features:**

All automatic reference features (Table of Contents, Cross-References, etc.) require consistent use of built-in heading styles throughout the document.



# Creating Automatic Table of Contents

## **What is a Table of Contents (TOC)?**

An automatically generated list of document sections with corresponding page numbers, based on heading styles applied throughout the document.

## **Creating a Table of Contents:**

Apply heading styles (Heading 1, 2, 3) consistently throughout document

Position cursor where TOC should appear (typically after title page)

References tab → Table of Contents group → Table of Contents

Choose from built-in styles (Automatic Table 1, 2) or Custom Table of Contents

## **Built-in TOC Styles:**

- **Automatic Table 1:** Includes "Contents" title, formatted with lines
- **Automatic Table 2:** Includes "Table of Contents" title, cleaner design
- **Manual Table:** Non-automatic, requires manual entry (not recommended)
- **Custom Table of Contents:** Full control over formatting and levels



# Creating Automatic Table of Contents

## **TOC Customization Options:**

- Show levels: Choose how many heading levels to include (1-9)
- Show page numbers: Display or hide page numbers
- Right-align page numbers: Professional appearance with leader dots
- Tab leader: None, dots, dashes, or solid line
- Formats: Various built-in styles (Classic, Distinctive, Formal, Simple)



# Managing and Updating Table of Contents

## **Updating the Table of Contents:**

As you edit document content, headings, or page numbers, the TOC becomes outdated and must be updated:

### **Update Methods:**

- **Click TOC → Update Table button**
- **Right-click TOC → Update Field**
- **Select TOC → Press F9 key**

### **Update Options:**

- **Update page numbers only:** Quick update when only pagination changed
- **Update entire table:** Complete refresh including new/deleted headings and text changes





# Managing and Updating Table of Contents

## **Modifying TOC Appearance:**

- Click TOC → References tab → Table of Contents → Custom Table of Contents
- Adjust formatting, levels, tab leaders, and styles
- Modify TOC styles directly for advanced customization

## **Removing Table of Contents:**

References tab → Table of Contents → Remove Table of Contents

## **Best Practices:**

- Update TOC before finalizing document
- Always update after adding/removing sections
- Verify page numbers match actual document pages
- Keep TOC on separate page for professional appearance



# Captions for Figures and Tables

## **What are Captions?**

Numbered labels automatically assigned to figures, tables, equations, or other objects, enabling consistent referencing throughout document.

## **Why Use Captions:**

- Automatic sequential numbering (Figure 1, Figure 2, Table 1, Table 2)
- Professional appearance and organization
- Enable automatic List of Figures and List of Tables
- Allow cross-referencing from text to visual elements
- Renumber automatically when figures are added or removed

## **Adding Captions:**

1. Select figure, table, or object
2. References tab → Captions group → Insert Caption
3. Choose label type (Figure, Table, Equation) or create custom label



# Captions for Figures and Tables

## **Adding Captions (continues):**

4. Enter descriptive caption text
5. Choose position (above or below object)
6. Click OK

## **Caption Formatting:**

- **Standard Format:** "Figure 1: Circuit diagram of voltage divider"
- **Label:** Figure, Table, Equation (or custom)
- **Number:** Automatic sequential numbering
- **Description:** Brief, descriptive text explaining the element

## **Engineering Documentation Standards:**

- **Figures:** Caption below the figure
- **Tables:** Caption above the table
- **Equations:** Number in parentheses at right margin



# Creating Lists of Figures and Tables

## **Purpose of Lists:**

Similar to Table of Contents, Lists of Figures and Tables provide organized navigation to all visual elements in document, commonly required in formal engineering reports and theses.

- **Creating List of Figures:**

1. Position cursor where list should appear (typically after Table of Contents)
2. References tab → Captions group → Insert Table of Figures
3. Select caption label (Figures)
4. Choose format and options
5. Click OK

- **Creating List of Tables:**

1. Follow same process as List of Figures
2. Change caption label to "Table"
3. Typically placed on separate page after List of Figures



# Creating Lists of Figures and Tables

## Customization Options:

- **Show page numbers:** Display page location of each figure/table
- **Right-align page numbers:** Professional appearance with leader
- **Tab leader:** Dots, dashes, or lines connecting title to page number
- **Format:** Various built-in styles
- **Include label and number:** Show "Figure 1:" or just caption text

## Updating Lists:

- Click list → Update Table button
- Right-click → Update Field
- Press F9 key
- Update before finalizing document



# Cross-References - Linking Within Documents

## **What are Cross-References?**

Dynamic links within document that reference other elements (headings, figures, tables, equations, pages), automatically updating when referenced item changes.

## **Benefits of Cross-References:**

- Automatic updates when referenced items move or renumber
- Professional appearance: "See Figure 3" instead of "See the figure below"
- Clickable links for easy navigation (Ctrl+Click)
- Maintain accuracy throughout document revisions

## **Creating Cross-References:**

1. Type introductory text: "As shown in "
2. References tab → Captions group → Cross-reference
3. Choose reference type (Heading, Figure, Table, Equation, etc.)



# Cross-References - Linking Within Documents

## **Creating Cross-References:**

4. Select specific item to reference
5. Choose what to insert (page number, caption text, number only)
6. Check "Insert as hyperlink" for clickable navigation
7. Click Insert

## **Reference Type Options:**

- **Numbered item:** Heading, Figure, Table, Equation
- **Bookmark:** Custom marked locations
- **Footnote/Endnote:** Reference to notes
- **Insert reference to:** Page number, caption text, label and number, number only

## **Example Usage in Engineering Reports:**

"The experimental setup is illustrated in Figure 3. As shown in Table 2, the measured values confirm the theoretical predictions discussed in Section 2.1."



# Footnotes and Endnotes

## **Footnotes vs. Endnotes:**

- **Footnotes:** Appear at bottom of same page as reference mark
- **Endnotes:** Appear at end of document or section
- **Purpose:** Provide additional information, clarifications, or source citations without interrupting main text flow

## **When to Use Footnotes/Endnotes:**

- Citing sources (alternative to in-text citations)
- Providing supplementary information
- Explaining technical terms or abbreviations
- Acknowledging contributions or permissions
- Adding tangential but relevant information

## **Inserting Footnotes:**

1. Position cursor where reference mark should appear





# Footnotes and Endnotes

## **Inserting Footnotes (continues):**

2. References tab → Footnotes group → Insert Footnote
3. Type footnote text at bottom of page
4. Return to main text automatically

## **Inserting Endnotes:**

1. Position cursor where reference mark should appear
2. References tab → Footnotes group → Insert Endnote
3. Type endnote text at end of document
4. Return to main text

## **Footnote/Endnote Formatting:**

- **Numbering:** Automatic sequential numbering (1, 2, 3 or i, ii, iii)
- **Reference Mark:** Superscript number in text
- **Separator Line:** Horizontal line separating footnotes from main text
- **Font and Spacing:** Typically smaller font than body text



# Managing Footnotes and Endnotes

## **Footnote and Endnote Dialog Box:**

References tab → Footnotes group → Dialog box launcher (small arrow)

## **Customization Options:**

- **Location:** Bottom of page or below text (footnotes); End of document or end of section (endnotes)
- **Number Format:** 1,2,3 or a,b,c or i,ii,iii or symbols (\*, †, ‡)
- **Start at:** Begin numbering at specific number
- **Numbering:** Continuous, restart each section, or restart each page
- **Apply changes:** Whole document or current section

## **Converting Between Footnotes and Endnotes:**

1. Right-click on footnote or endnote text
2. Select "Convert to Endnote" or "Convert to Footnote"
3. Or use Footnote and Endnote dialog → Convert button



# Managing Footnotes and Endnotes

## **Navigating Footnotes/Endnotes:**

- **Next Footnote:** References tab → Footnotes group → Next Footnote dropdown
- **Show Notes:** Jump between reference mark and note text
- **Navigation Pane:** Search for footnote/endnote text

## **Deleting Footnotes/Endnotes:**

- Delete the reference mark in main text (not the note text)
- Remaining notes automatically renumber

## **Engineering Documentation Practice:**

Footnotes are commonly used for equipment specifications, measurement uncertainties, or clarifications that would disrupt main text flow.



# Citations and Bibliography - Introduction

## **Academic Integrity and Source Attribution:**

Proper citation of sources is essential in engineering education and professional practice to:

- Give credit to original authors and researchers
- Avoid plagiarism and academic misconduct
- Enable readers to locate and verify sources
- Demonstrate research depth and credibility
- Meet institutional and publication requirements

## **Citation Styles:**

Different academic disciplines and institutions require specific citation formats:

- **APA (American Psychological Association):** Social sciences, engineering, education
- **MLA (Modern Language Association):** Humanities, literature
- **Chicago/Turabian:** History, some social sciences
- **IEEE:** Engineering, computer science, electronics (most common for electrical engineering)
- **Harvard:** Various disciplines, author-date system



# Citations and Bibliography - Introduction

## **Word's Citation Management:**

Word provides built-in citation and bibliography tools supporting multiple citation styles, enabling:

- Insert in-text citations
- Manage source information
- Generate automatic bibliography
- Switch between citation styles instantly



# Inserting Citations and Managing Sources

## **Adding a New Source and Citation:**

1. Position cursor where citation should appear
2. References tab → Citations & Bibliography group → Insert Citation → Add New Source
3. Select source type (Book, Journal Article, Website, Conference Proceedings, etc.)
4. Fill in source information fields (author, title, year, publisher, etc.)
5. Click OK
6. Citation appears in text, source saved for bibliography

## **Source Types and Required Fields:**

- **Book:** Author, title, year, publisher, city
- **Journal Article:** Author, title, journal name, year, volume, issue, pages
- **Website:** Author, title, URL, year accessed
- **Conference Proceedings:** Author, title, conference name, year, location
- **Report:** Author, title, institution, year, report number



# Inserting Citations and Managing Sources

## Managing Sources:

References tab → Citations & Bibliography group → Manage Sources

- **Master List:** All sources ever used on computer
- **Current List:** Sources used in current document
- **Edit Source:** Modify source information
- **Delete Source:** Remove unused sources
- **Copy:** Transfer sources between Master and Current lists
- **Search:** Find specific sources quickly

## Inserting Existing Citations:

References tab → Insert Citation → Select from list of current sources



# Creating and Formatting Bibliography

## **Generating Automatic Bibliography:**

Position cursor where bibliography should appear (typically end of document)

References tab → Citations & Bibliography group → Bibliography

Choose built-in style (Bibliography, References, Works Cited) or Insert Bibliography

## **Bibliography vs. References vs. Works Cited:**

- **Bibliography:** All sources consulted, including those not directly cited
- **References:** Only sources directly cited in document (most common in engineering)
- **Works Cited:** Similar to References, used in MLA style

## **Updating Bibliography:**

After adding, editing, or removing citations:

- Click bibliography → Update Citations and Bibliography
- Or right-click → Update Field





# Creating and Formatting Bibliography

## **Changing Citation Style:**

References tab → Citations & Bibliography group → Style dropdown

- Select different style (APA, IEEE, MLA, Chicago, etc.)
- All citations and bibliography automatically reformat

## **Manual Editing:**

- Convert bibliography to static text for manual adjustments
- Not recommended: loses automatic update capability
- Better approach: Edit source information in Manage Sources

## **Engineering Standard:**

IEEE style is most common for electrical engineering, using numbered citations [1], [2], [3] in order of appearance.



# IEEE Citation Style for Engineering

## **IEEE Citation Format:**

The Institute of Electrical and Electronics Engineers (IEEE) style is standard for electrical engineering and computer science publications.

## **In-Text Citations:**

- Numbered citations in square brackets: [1], [2], [3]
- Numbers assigned in order of first appearance
- Multiple citations: [1], [3], [5] or [1]-[5] for consecutive
- Same source cited multiple times uses same number

## **Reference List Format:**

### **Journal Article:**

[1] A. Author, "Article title," *Journal Name*, vol. X, no. Y, pp. ZZ-ZZ, Month Year.

### **Book:**

[2] A. Author, *Book Title*, Edition. City, State: Publisher, Year.



# IEEE Citation Style for Engineering

## Reference List Format (continues):

### Conference Paper:

[3] A. Author, "Paper title," in *Proc. Conference Name*, City, State, Year, pp. ZZ-ZZ.

### Website:

[4] A. Author, "Page title," Website Name. URL (accessed Month Day, Year).

### Technical Report:

[5] A. Author, "Report title," Institution, City, State, Rep. Number, Year.

### Key Formatting Rules:

- Authors: Initials followed by last name
- Article titles: In quotation marks
- Book/Journal titles: In italics
- Abbreviate journal names and months
- Include DOI when available



# Bookmarks and Hyperlinks

## **Bookmarks - Marking Specific Locations:**

Bookmarks create named locations within document for quick navigation and cross-referencing.

### **Creating Bookmarks:**

1. Select text or position cursor at location
2. Insert tab → Links group → Bookmark
3. Enter bookmark name (no spaces, must start with letter)
4. Click Add

### **Using Bookmarks:**

- Navigate: Insert tab → Links → Bookmark → Select → Go To
- Cross-reference: References tab → Cross-reference → Reference type: Bookmark
- Hyperlink destination: Link to bookmark within document

### **Hyperlinks - Creating Clickable Links:**

Hyperlinks enable navigation to external websites, email addresses, other documents, or locations within current document.



# Bookmarks and Hyperlinks

## Inserting Hyperlinks:

1. Select text to become link
2. Insert tab → Links group → Link (or Ctrl+K)
3. Choose link destination:
  - **Existing File or Web Page:** External documents or websites
  - **Place in This Document:** Headings or bookmarks
  - **Create New Document:** Link to new file
  - **E-mail Address:** Create mailto link
4. Enter address and display text
5. Click OK

## Hyperlink Best Practices:

- Use descriptive link text (not "click here")
- Test all links before finalizing document
- Consider printing: URLs may not be clickable in printed documents



# Creating Document Index and Best Practices

## **Document Index:**

An alphabetical list of key terms with corresponding page numbers, typically found in lengthy technical manuals, textbooks, and comprehensive reports.

## **Creating an Index:**

- 1. Mark Index Entries:** Select term → References tab → Index group → Mark Entry
  - Main entry: Primary term
  - Subentry: Related term under main entry
  - Cross-reference: "See" or "See also" references
  - Mark All: Automatically mark all occurrences
- 2. Insert Index:** Position cursor → References tab → Insert Index
- 3. Choose Format:** Indented, run-in, or custom
- 4. Update Index:** Right-click → Update Field (after document changes)



# Creating Document Index and Best Practices

## **Index Entry Examples:**

- Main entry: Voltage
- Subentry: Voltage: measurement, calculation, divider
- Cross-reference: Voltage. *See also* Current, Resistance

## **Best Practices for References and Navigation:**

### **Planning:**

- Use heading styles consistently from document start
- Plan document structure before writing
- Decide on citation style early (check institutional requirements)

### **Consistency:**

- Apply same formatting to all similar elements
- Use automatic features rather than manual numbering
- Maintain consistent caption format



# Creating Document Index and Best Practices

## **Maintenance:**

- Update all automatic elements before finalizing
- Verify cross-references point to correct items
- Check that all citations have corresponding bibliography entries
- Test hyperlinks and bookmarks

## **Professional Quality:**

- Include Table of Contents for documents >10 pages
- Add List of Figures/Tables for documents with multiple visuals
- Use proper citation style consistently
- Proofread all reference elements





# Questions & Answers

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