Word 2007's Reference Manager

Introduction

Word 2007 comes with an in-built management system for managing references within a document. It allows you to keep a record of sources you have used, and present them in your document using one of the supplied 'styles' (APA, Chicago and others). Although it is cruder than using a fully-fledged bibliography manager, such as Endnote, it has the advantage of requiring no further investment and is fairly simple to use. It adds only short, in-text, citations (Author, Year), not the full citations used in footnotes.

Should you prefer a more fully-featured package, Endnote is provided on College workstations – see Start-Programs-Bibliographic and free text databases. If you want to use it at home you should buy your own copy – the manufacturers recommend it for PhD students. EndnoteWeb, a cut-down web version, is available to anyone with a current ITS username and password, at http://www.endnoteweb.com; note that you should initially sign up for an account from within the College, but may thereafter use it from anywhere, so long as you sign in once a year from a College computer. Documentation on both is available at http://www.bbk.ac.uk/its/help/documentation/its_documentation/endnote.

Terminology

Source   full details of the book, journal article etc. which you will add to your document

Citation   either within the text or a footnote, identifies the source so a reader may find the exact source to which you refer in the bibliography

Bibliography   a list of all citations within the document, giving full details

Add new Sources manually

You add sources directly into Word's reference manager once you have created your document. Word keeps a master list of all information entered, such that all source information is available for any other documents you create.

Typing new sources into the reference manager is straightforward, though note that once a reference has been added its information will be entered straight into your document.

On the References Ribbon, click **Insert Citation** and choose **Add New Source**, as shown
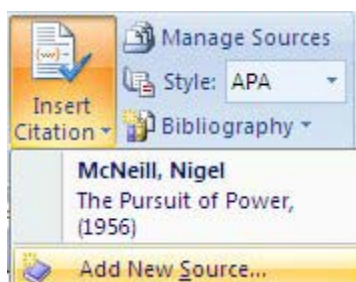
You should then fill in details on the dialog box that pops up, making sure you select the correct reference type from the drop-down at the top

Note that capitalisation is important for Author names. Citations are listed alphabetically, but if some are entered as McNeill, A, and others as mcneill, A, the latter will appear in their own list, below the first list.

A few other fields are available and will be shown if you tick the box at the bottom left, as shown.

Which fields are shown by default and which only when the box is ticked will vary from reference types – so for a book, city and publisher are both shown, but are hidden (unless you tick the box, as above) for a journal article.

Adding and editing references in your Document

If you have just typed reference details in, as above, that reference will be immediately added to the document.

However, you are likely to cite some sources several times, and may have imported references from the master list (see 'The Master List', below).

All references pertaining to the current document – those typed in or copied across from the master list – are available from the Insert Citation button.

The list of available citations is shown immediately below the button you clicked.

Click on a source to insert it into the document.

Note that the menu shown will never be longer than the screen, so you may need to scroll down to find the correct source once you have a number attached to your document.
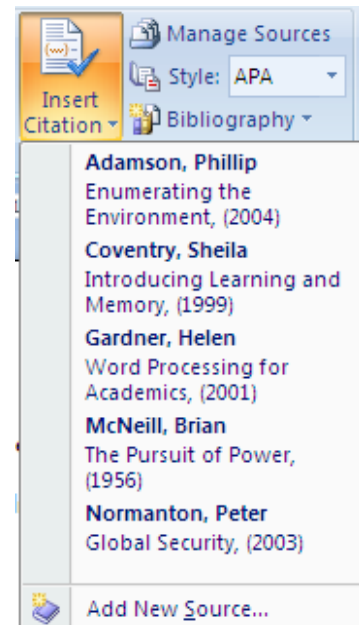

Editing references

There are two edit functions available from each citation. Click on the citation and then on the arrow that appears at its bottom-right to see the list shown in the screenshot below.
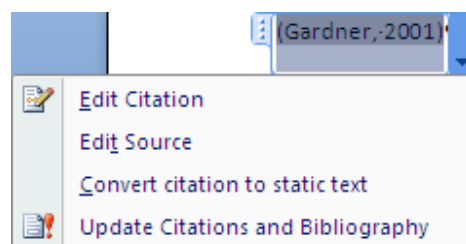
Edit Source allows you to edit the reference itself, in case you have extra information to add or need to change the spelling (e.g. of the author's name).

Edit Citation allows you to add page numbers and omit some details, as in the screenshot to the right. Different styles will display page numbers differently – e.g. APA includes "p.", Chicago does not.
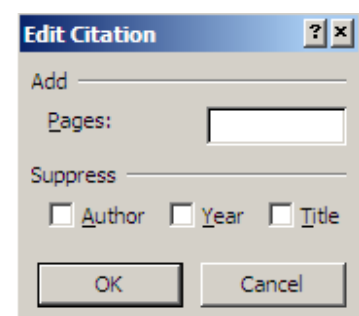
Search Libraries

This feature currently promises more than it delivers – it does not allow you to search academic libraries to import reference information, as you might with Endnote or Reference Manager – but allows for a search within several thesauruses and research sites.

The screenshot on the right is a complete list at the time of writing.

Click on a category heading to search those sources.
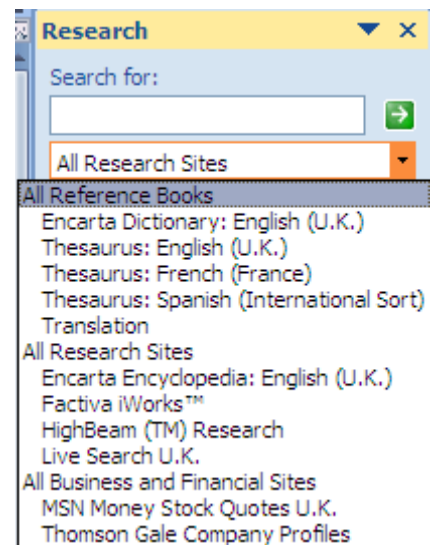
It is possible to move a source from one category to another, but this involves changing the Registry, and should only be attempted by experienced users.

Adding a Bibliography

The bibliography will be made up of all sources you have entered whilst editing the current document and any you have transferred from the master list, not only those cited in the document. To add one, click on the Bibliography button and select an option. The bibliography will be inserted into your document wherever the cursor was positioned.

- The first two options appear in the list with a sample to show how they will look – only the title changes, appearing either as Bibliography or Works Cited
- To insert the bibliography on its own (and type your own title if required), click on Insert Bibliography at the end of the list

Once added the bibliography will appear as in the screen shot below.

The icon at the top left allows you to change the format of the bibliography – from the same list as the initial one, above.

If you have added any new references to the document you should click the Update Citations… icon to include those in the bibliography.
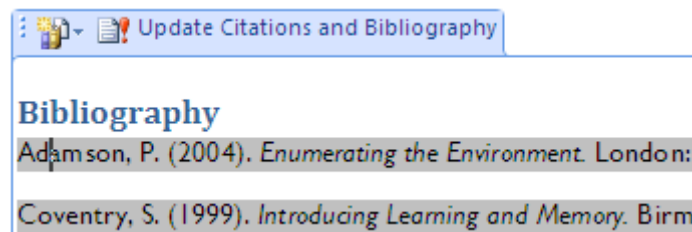
The Master List of References

All sources you add to a document are kept in a master list, which can be accessed from any document. That allows you to use references in several documents without retyping any details.

To see the master list, click on Manage Sources
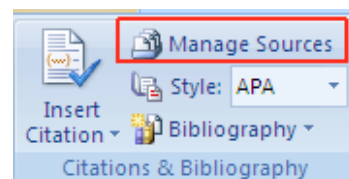
The list of all sources is shown on the left. The current list, relating to the current document, is on the right.

Use the buttons in the middle to copy sources across to the current document.

Note that the Delete button removes whichever reference is selected – either from the current document or from the master list, so be careful.

To copy several sources at once, hold the CTRL key and then click on each source to select them all, then click on the Copy button. Should you try to copy a source that has already been copied to the current document you will see an error message;
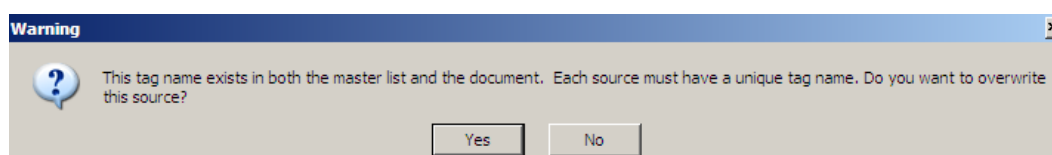
If you are certain you are copying the same source, click Yes. If you have any doubt, click No to prevent any sources in the current document being overwritten.

You may also edit sources from this window – Word will ask if you want to update a source in the master list and you should normally click Yes.