Creating a Document in Outline View

Outline view lets you create and work with long documents in outline format.

View a document in Outline view

Outline view makes it much easier to create, view, and organize an outline.

Click the **View** tab on the Ribbon and click the

Outline button in the Document Views group.

The Outlining tab appears on the Ribbon.

By default, Level 1 is the selected style, which is the highest level in an outline. The Level 2 style is the next level, all the way down to Level 9.

🔸 **Other Ways to Open Outline View:**
Click the **Outline** button located on the status bar at the bottom of the document window.

Add a new heading

Adding a new heading to an outline is easy.

Place your cursor where you want to insert the document heading and type the heading.

🔸 **Other Ways to Add a New Heading:** Right-click the heading where you want to insert the new heading in the Navigation Pane and select one of the following options: **New Heading Before**, **New Heading After**, or **New Subheading**.

▪ **Exercise**

☐ **Exercise File:** None.

☐ **Exercise:** Open a new blank document in Word. Open the document in Outline View.
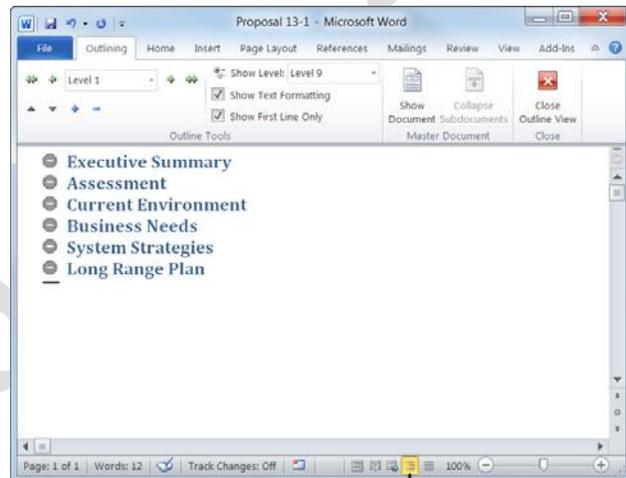
Type "Executive Summary" and press <Enter>.

Type "Assessment" and press <Enter>.

Type "Current Environment" and press <Enter>.

Type "Business Needs" and press <Enter>. Type

"System Strategies" and press <Enter>. Type

"Long Range Plan" and press <Enter>.

Outline button

Figure 12-1: A document in Outline view.

Rearranging an Outline or Long Document

You usually want to read through a document once you have finished writing it to make sure it is organized and logical. Outline view provides you with a good overview of your document, and it allows you to rearrange a document without a lot of scrolling.

Demote a heading

In Outline view, it's easy to change heading styles. For example, you could demote a Level 1 to Level 2.

☐ Place the insertion point in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Demote** button in the Outline Tools group.

The heading's formatting changes down a level in the outline. When a heading is demoted, its subordinate headings are not demoted with it.

🔶 **Other Ways to Demote a Heading:**
Place the insertion point at the end of the line and press **<Tab>**. Or, press **<Alt>** + **<Shift>** + **<>**. Or, click the **Outline Level** list arrow in the Outline Tools group and select a level. Or, right-click a document heading in the Navigation Pane and select **Demote** from the contextual menu.

Demote to body text

Body text does not show up as a heading in the outline.

☐ Place the insertion point in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Demote to Body Text** button in the Outline Tools group.

When body text is inserted under a heading, a plus sign appears next to the heading indicating that there is text beneath it.

🔶 **Other Ways to Demote to Body Text:**
Click the **Outline Level** list arrow in the Outline Tools group and select **Body Text** from the list.

☐ **Exercise File:** Proposal 12-2.docx.

☐ **Exercise:** Demote Current Environment to Level 2 text.

Add two subheadings under "System Strategies": Hardware" and "Software"

Enter this body text under the "Software" subheading: "The proposed operating system of North Shore Travel is Windows 7."
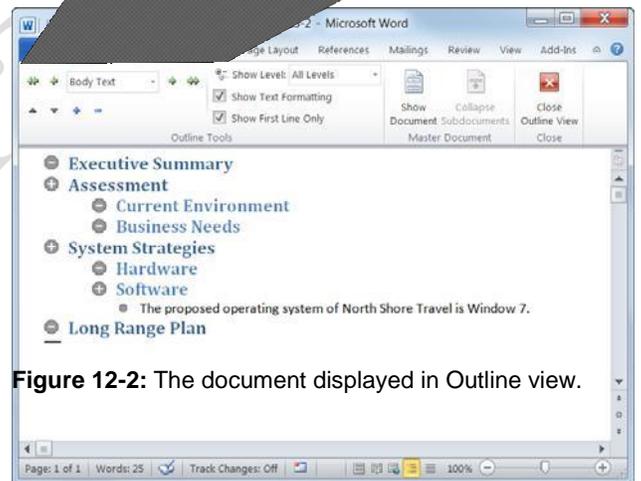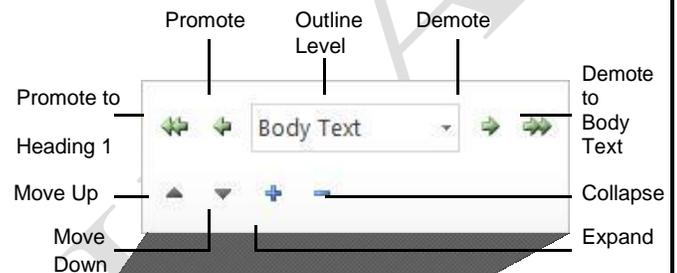

Figure 12-2: The document displayed in Outline view.

Figure 12-3: Use the controls in the Outline Tools group to rearrange headings in Outline view.

Promote a heading

☐ Place the insertion point in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Promote** button in the Outline Tools group.

The heading is promoted to the next highest level.

☀ **Other Ways to Promote a Heading:**
Place the insertion point at the end of the line and press **<Shift>** + **<Tab>**. Or, press **<Alt>** + **<Shift>** + **< >**. Or, click the **Outline Level** list arrow in the Outline Tools group and select a level. Or, right- click a heading in the Navigation Pane and select **Promote** from the contextual menu.
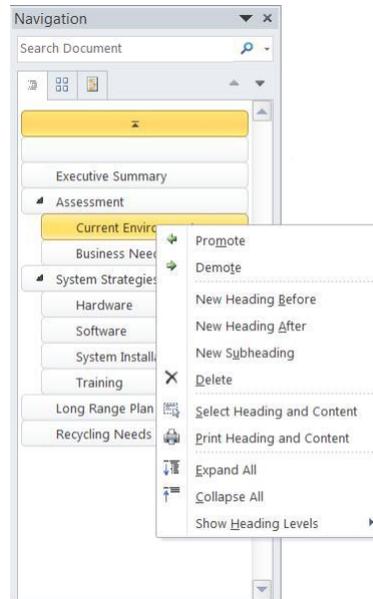
Promote to Heading 1

Here's how to promote a heading to the highest level in the outline, Heading 1.

☐ Place the insertion point in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Promote to Heading 1** button in the Outline Tools group.

☀ **Other Ways to Promote to Heading 1:**
Click the **Outline Level** list arrow in the Outline Tools group and select **Level 1** from the list.

The heading level is changed.

Rearrange an outline

You can move a document's headings and subheadings around to rearrange the document.

☐ Place the insertion point in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click either the **Move Up** button or **Move Down** button in the Outline Tools group.

☀ **Other Ways to Rearrange Headings:**
Click and drag the heading's outline symbol to a new location in the outline.

The heading and all of its subordinate headings and text are moved.

Figure 12-4: Use the Navigation Pane to rearrange your long documents.

Numbering an Outline

If you decide that you want the heading levels in your document to be numbered, this lesson explains how to do it.

☐ Select the headings and text you want to number.

Apply a multilevel numbering scheme that numbers headings accordingly.

☐ Click the **Home** tab on the Ribbon and click the **Multilevel List** button in the Paragraph group.

The table below shows the many options for outline numbering.

To number an outline that already is organized by heading levels, select an option that has Heading highlighted in gray after the numbering scheme.

For example, Heading 1 will be numbered the highest level of the multilevel numbering scheme, Heading 2 will be numbered the next highest level in the multilevel numbering scheme, and so on.

☐ Select the numbering scheme you want to use from the list.

The outline numbering is applied to the headings in the document.

▪ **Exercise**

☐ **Exercise File:** Proposal 12-3.docx

☐ **Exercise:** Open the document in Print Layout view. Select all the text in the document and apply this multilevel list style to the outline:
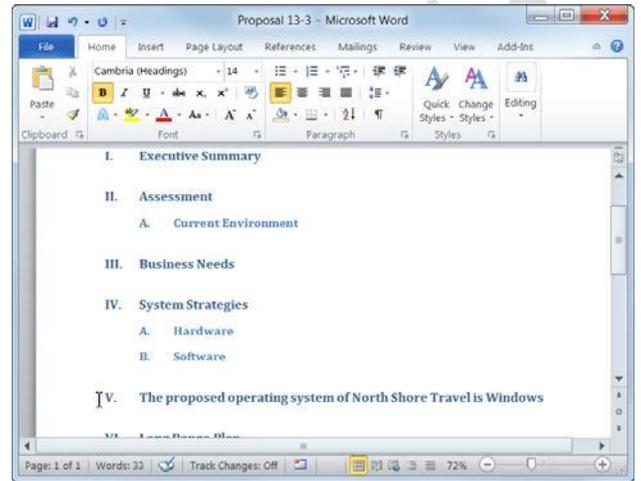
Remove the style when you are done.

Figure 12-5: An outline with multilevel numbering.

Table 12-1: Multilevel List Numbering Options

1. ——— a. ——— i. ———	1) ——— a) ——— i) ———	1. ——— 1.1. ——— 1.1.1. ———
❖ ——— ➤ ——— ▪ ———	Article I. Head Section 1.01 ⊦ (a) Heading 3-	1 Heading 1— 1.1 Heading 2- 1.1.1 Heading
I. Heading 1— A. Heading 2 1. Heading	Chapter 1 Hea Heading 2—— Heading 3——	

Viewing an Outline

As a document grows longer and longer, it can become increasingly difficult to see its overall structure. Outline view can tame even the longest, wildest documents (provided they are organized by heading styles) and help you separate "the forest from the trees."

Outline view lets you decide how much of your document's structure you want to see. You can collapse a heading and hide its subheadings and text, and expand a collapsed heading to display its subheadings and text.

Display all headings above a specific level

This command lets you view headings that are at or above a certain level. For example, choosing Level 2 displays all Heading 2 and Heading 1 headings.

☐ Click the **Outlining** tab on the Ribbon and click the **Show Level** list arrow in the Outline Tools group.

☐ Select a level from the list.

The level you selected and all headings above it are displayed. All other headings and body text are collapsed.

Expand a heading

The plus symbol indicates this heading contains subheadings and body text. Expand the heading to display anything under it.

☐ Make sure the insertion point is in the heading.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Expand** button in the Outline Tools group.

📖 **Other Ways to Expand a Heading:** Double-click the heading's plus symbol. Or, press **<Alt> + <Shift> + <+>**.

The heading expands, displaying subordinate text and subheadings.

▪ **Exercise**

☐ **Exercise File:** Proposal 12-4.docx

☐ **Exercise:** Open the document in Outline view. Show the Level 1 outline level. Show the Level 2 outline level. Expand the Long Range Plan heading, then collapse it again. Show all levels in the outline, then show the first line under each heading.
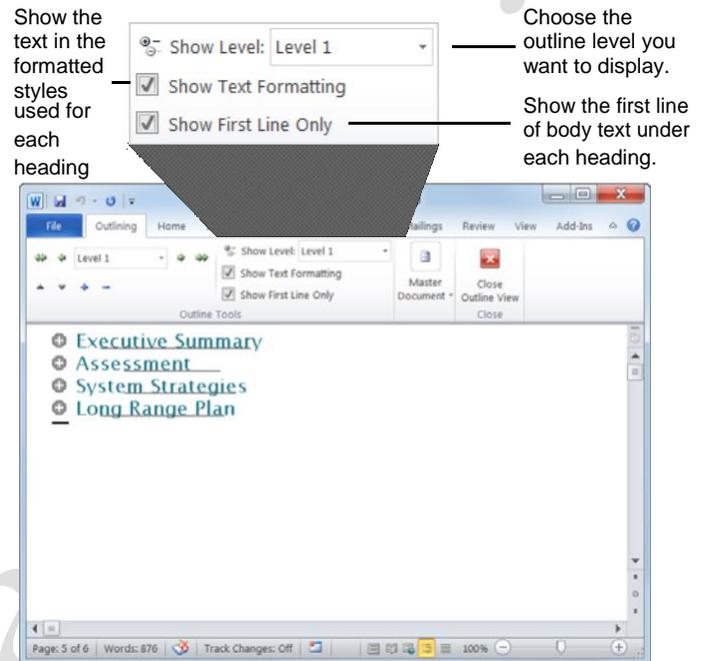
Show the text in the formatted styles used for each heading

Choose the outline level you want to display.

Show the first line of body text under each heading.

Figure 12-6: The outline with Level 1 displayed.
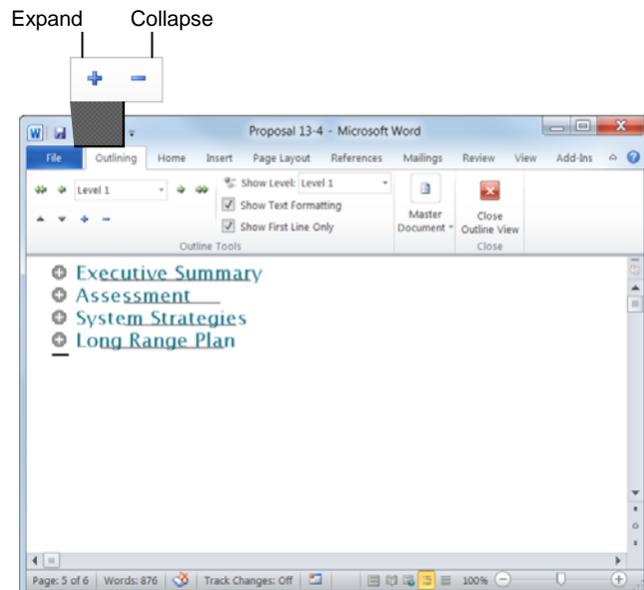
Expand   Collapse

Figure 12-7: The outline with the Long Range Plan heading expanded.

Collapse a heading

You can also collapse the heading to hide
any subheadings and text under it.

☐ Make sure the insertion point is in the heading.

☐ In Outline view, click the **Outlining** tab on the
Ribbon and click the **Collapse** button in the Outline
Tools group.

🔵 **Other Ways to Collapse a Heading:**
Double-click the heading's minus symbol.
Or, press **<Alt>** + **<Shift>** + **<_>**.

The heading collapses, hiding subordinate text
and subheadings.

Display all levels

All of the text levels are now displayed with
this command, including body text.

☐ In Outline view, click the **Outlining** tab on the
Ribbon and click the **Show Level** list arrow in
the Outline Tools group.

☐ Select **All Levels** from the list.

All the levels in the outline are displayed.

Display first line of body text under a heading

Instead of viewing all of the subordinate text in a
document, sometimes it is useful to view only the
first line of the body text under each heading.

In Outline view, click the **Outlining** tab on the
Ribbon and click the **Show First Line Only**
check box in the Outline Tools group.

Only the first line of body text under each heading
is shown. This gives you an idea of the content
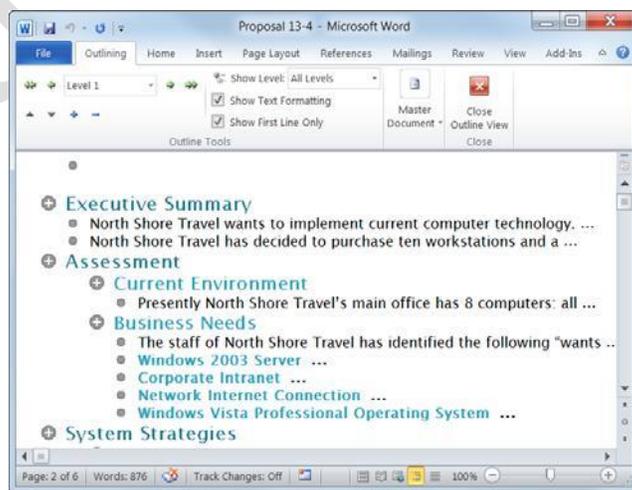under each heading, without having to see all of the
body text.

Double-click a
heading to
expand or
collapse it.
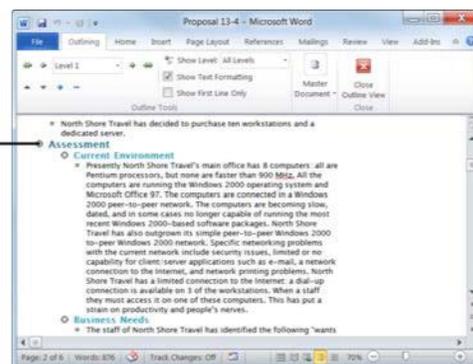
Figure 12-8: The outline with all levels shown.

Figure 12-9: The outline with only first lines displayed.

Navigating Long Documents

Once you've created your long document using Outline view, you can use the Navigation Pane to browse headings and pages in longer documents while leaving the main document window open.

Navigate a long document

The Navigation Pane makes it easy to get from one place to the next in a document using its headings.

☐ Click the **View** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears, displaying the "Browse the headings in your document" tab.

  🧭 **Other Ways to Open the Navigation Pane:** Press **<Ctrl>** + **<F>**. Or, click the **Home** on the Ribbon and click the **Find** button in the Editing group.

☐ Click the **Browse the headings in your document** tab in the Navigation Pane.

The document's headings appear.

  📘 **Trap:** Headings only appear if you are viewing a document that uses heading styles.

☐ Click a heading.

The heading is displayed in the main document window.

Rearrange document headings

You can rearrange your document headings in the Navigation Pane.

In the Navigation Pane, click the heading, drag it to the desired location, and release the mouse.

The heading is moved, along with all the headings and body text beneath it,

Navigate document pages

You can also view thumbnails of all the pages in your document in the Navigation Pane.

☐ Click the **View** tab on the Ribbon and click the **Navigation Pane** check box in the Show group.

The Navigation Pane appears, displaying the "Browse the headings in your document" tab.

  🧭 **Other Ways to Open the Navigation Pane:** Press **<Ctrl>** + **<F>**. Or, click the **Home** tab and click the **Find** button.

- **Exercise**

☐ **Exercise File:** Proposal 12-5.docx.

☐ **Exercise:** Use the Navigation Pane to navigate to the Hardware subheading.
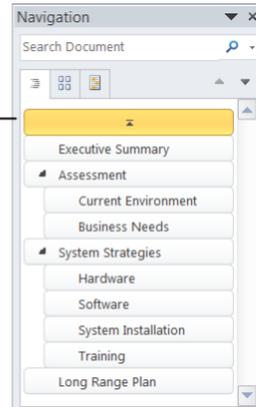

Figure 12-10: The Browse the headings in your document tab of the Navigation Pane.
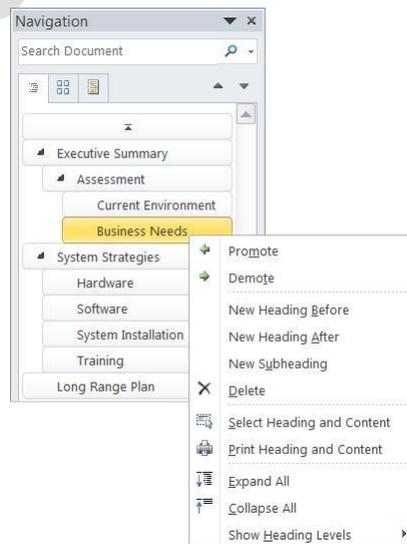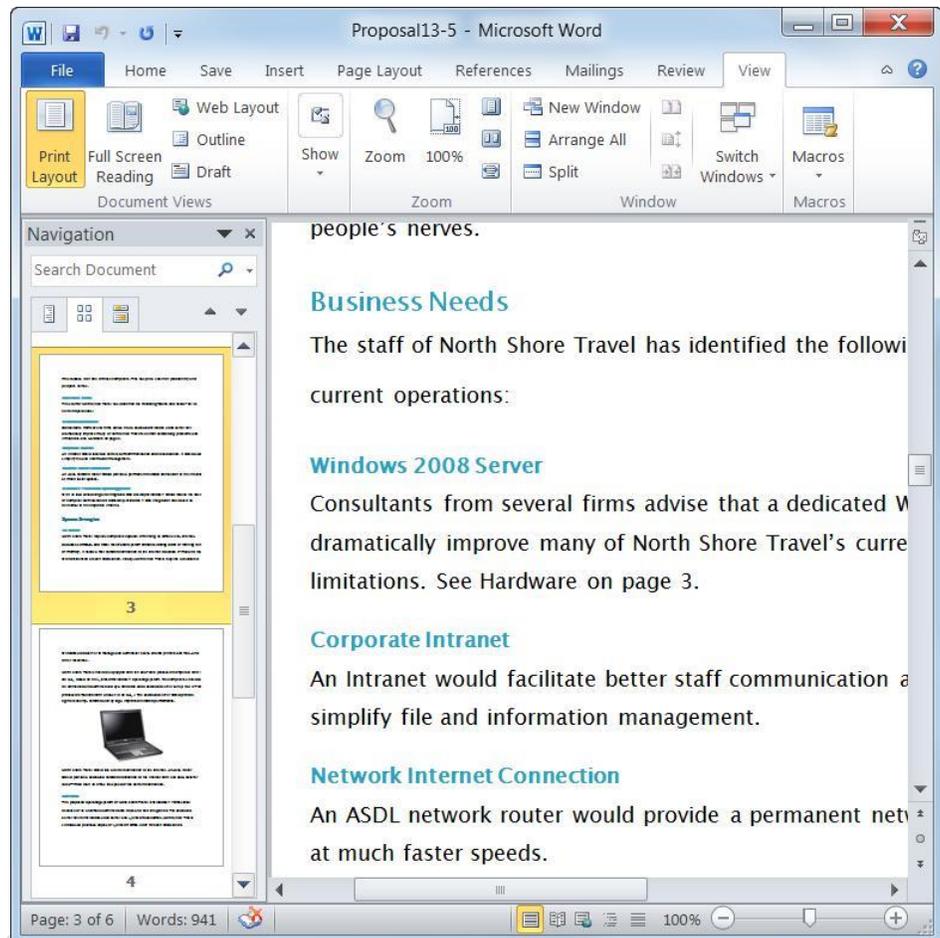

Figure 12-11: Rearrange document headings in the Navigation Pane.

☐ Click the **Browse the pages in your document** tab in the Navigation Pane.

The Navigation Pane displays thumbnail images of all the pages in the document.

Figure 12-12: Click the Browse the pages in your document tab to view thumbnails of each page in your document.

Working with Master Documents

All you have to do to create a master document is insert one or more subdocuments into any document.

Once you have created a master document and its subdocuments, you can start working on it. If the master document is stored on a network, several users can open and work on their own subdocuments at the same time. You can modify, rearrange, and delete the subdocuments in a master document. You can even convert a subdocument into the master document, so that it is actually part of the master document, instead of saved in a separate subdocument.

In this lesson, you will learn how to create a master document, how to delete a subdocument, and how to convert a subdocument into the master document.

Open Master Document view

First, you need to open Master Document view, which is part of Outline view.

☐ Open a document in Outline view.

☐ Click the **Outlining** tab on the Ribbon and click the **Show Document** button in the Master Document group.

The commands for creating and working with a master document appear.

Expand subdocuments

When a master document is opened, the subdocuments appear as links. To view the contents of the subdocuments rather than the links, expand the subdocuments.

In Outline view, click the **Outlining** tab on the Ribbon and click the **Expand Subdocuments** button in the Master Document group.

The contents of the subdocuments are expanded in outline view. Go back to Print Layout view if necessary.

Insert a subdocument

A master document is a good way to create a long document that has several individual sections, like chapters in a book.

- **Exercise**

☐ **Exercise File:** Proposal 12-6.docx, Recycling Needs.docx, and Bob's Report.docx

☐ **Exercise:** Open the Proposal 12-6.docx document in Master Document view and expand the Recycling Needs subdocument.
Make the Recycling Needs subdocument part of the main document.
Insert the Bob's Report document at the end of the Proposal 12-6.docx document.
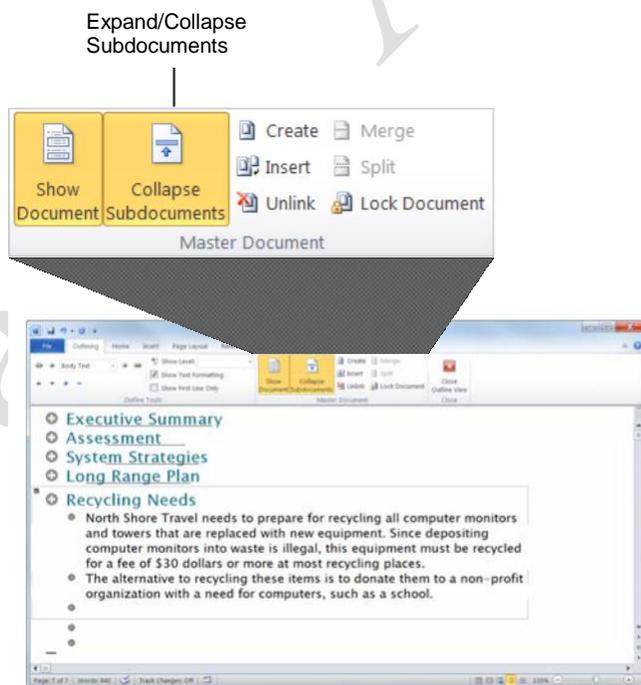
Expand/Collapse
Subdocuments

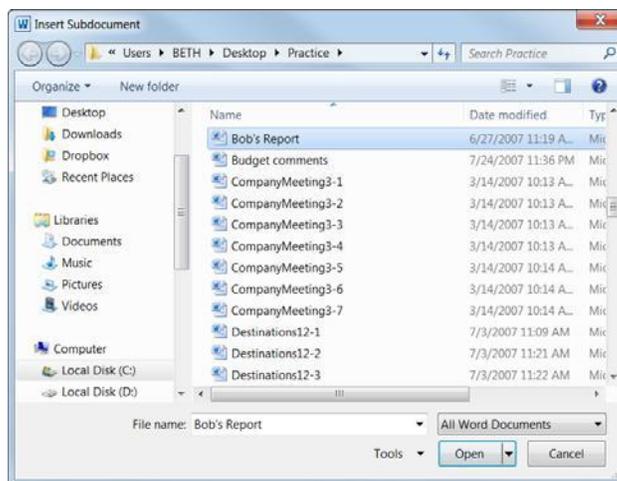**Figure 12-13:** A master document with expanded subdocument.

☐ Place the insertion point where you would like to insert the subdocument.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Insert Subdocument** button in the Master Document group.

The Insert Subdocument dialog box appears.

🔵 **Trap:** Any existing subdocuments need to be expanded before you can insert a new one.

☐ Select the document you want to insert and click **Open**.

The subdocument is inserted in the document. You can see that the subdocument has a thin black border surrounding it.

## Make a subdocument part of the master document

Removing a subdocument puts the content of the document into the main document, rather than linking it to the subdocument file.

☐ Select the subdocument.

You can either select the entire subdocument, or just place your insertion point in the subdocument.

☐ In Outline view, click the **Outlining** tab on the Ribbon and click the **Unlink** button in the Master Document group.

The link to the subdocument is removed and the content of the subdocument is copied into the master document.

Remove a subdocument

If you find that you do not want to include a subdocument in the master document after all, you can remove it from the master document.

☐ In Outline view, click the subdocument's icon 📓 and press **<Delete>**.

The subdocument is removed from the master document. This does not remove the content from the subdocument, however.

✅ **Tip:** A subdocument must be removed before the master document is saved.

Figure 12-14: Select the subdocument you want to insert in the master document in the Insert Subdocument dialog box.
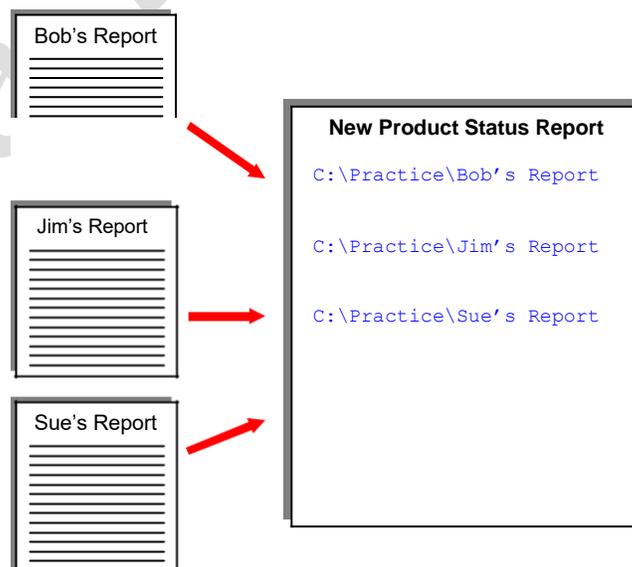
Figure 12-15: An example of how subdocuments are inserted in a master document.

Using Bookmarks

A bookmark in Word is just like a bookmark that you would use to mark your place in a novel. You use bookmarks in Word to mark a location in a document so that you can quickly find and jump back to that location. Bookmarks can also be used to create cross-references. For example, you could bookmark a paragraph about armadillos and then create a cross-reference to that bookmark.

Insert a bookmark

Bookmarks can be used as markers in a document. They can also be used to run certain fields in Word. For example, one of the Rules fields in a mail merge requires a bookmark to be used.

☐ Place your insertion point or select the text where you want to insert the bookmark.

If you want to use a bookmark for a certain field in Word, you will probably select text to insert the bookmark for that purpose.

☐ Click the **Insert** tab on the Ribbon and click the **Bookmark** button in the Links group.

The Bookmark dialog box appears.

☐ Click the **Bookmark name** text box and enter a name for the bookmark.

Bookmarks can be from 1 to 40 characters in length, must begin with a letter, and can only contain numbers, letters, or the underscore character—no spaces.

☐ Click **Add**.

The dialog box closes and the bookmark is inserted in the document.

Go to a bookmark

Once a bookmark is inserted, you can use the bookmark to quickly jump to the location in the document.

☐ Click the **Home** tab on the Ribbon and click the **Find** button list arrow in the Editing group.

A list of editing options appears.

🔵 **Other Ways to Open the Go To Dialog Box:** Press **<Ctrl>** + **<G>**.

✅ **Tip:** If the Ribbon is not wide enough, the Editing group will appear as the Editing button.

Type a name for the bookmark.   Existing bookmarks appear in this list.   Add the bookmark you entered in the Bookmark name box.
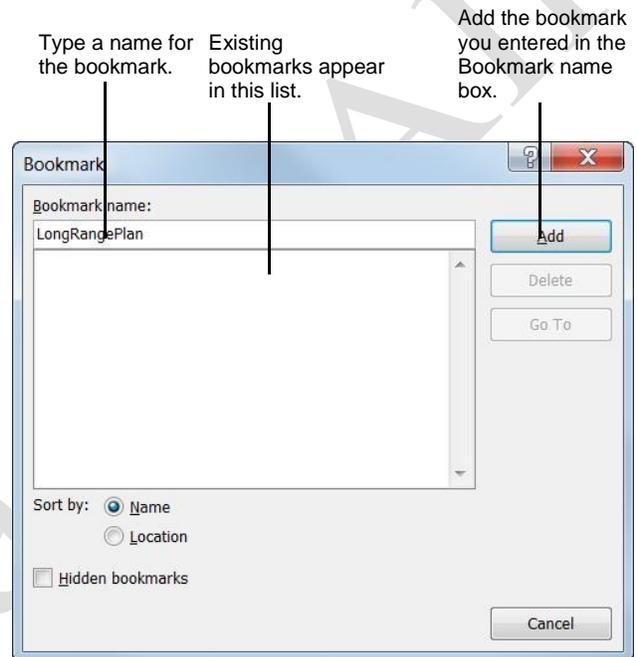
Figure 12-16: The Bookmark dialog box.

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☐   Select **Go To** from the list.

The Go To tab of the Find and Replace dialog box appears.

☐   Select **Bookmark** in the Go to what list.

☐   Click the **Enter bookmark name** list arrow and select the bookmark name.

☐   Click the **Go To** button.

The insertion point jumps to the location in the document.

🔶 **Other Ways to Go To a Bookmark:**
Click the **Insert** tab on the Ribbon and click the **Bookmark** button in the Links group. Select the bookmark in the Bookmark dialog box and click **Go To**.
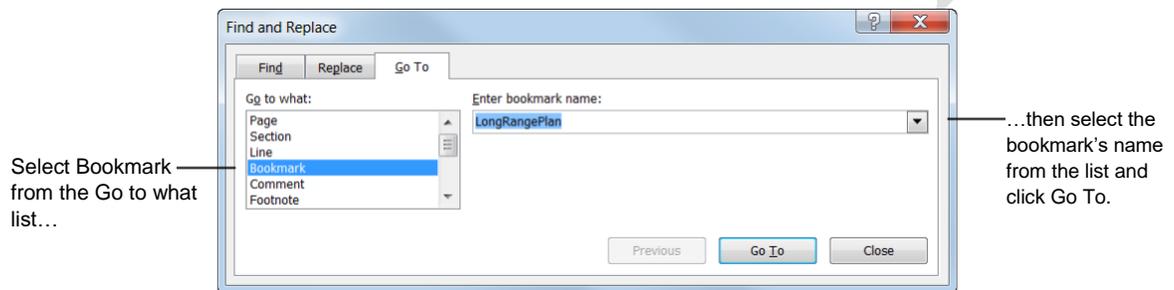
Figure 12-17: The Go To tab of the Find and Replace dialog box.

Using Cross-references

A cross-reference points the reader to another part of the document where they can find more information about something, such as: "See Penguin Feeding Behaviors on Page 17 for more information." When the page number is cross-referenced, the reference will automatically update if the page number changes. For example, if Page 17 all of a sudden became Page 14, the cross- reference would automatically update to say "Page 14".

Insert a cross-reference

Before inserting a cross -reference, make sure you know what it is that you want to reference.

☐ Place your insertion point where you want to insert the cross-reference.

☐ Click the **Insert** tab on the Ribbon and click the **Cross-reference** button in the Links group.

The Cross-reference dialog box appears.

☐ Click the **Reference type** list arrow and select the type of item you want to reference.

You can cross-reference many types of items such as bookmarks, headings, and more. The first thing you have to do is specify which type of item you want to cross-reference.

☐ Click the **Insert reference to** list arrow and select the item you want to reference.

The items that are available for the reference are displayed in the "For which numbered item".

☐ Select the item you want to reference to in the **For which…** box.

☐ Click **Insert**.

The cross-reference field is inserted in the document.

✅ Tips

▪ Cross-reference fields need to be updated if the item they reference is moved. You can manually update a cross-reference by right-clicking the cross-reference and selecting **Update Field**. Or, have Word update your document's fields. Click the **File** tab and click the **Options** button. Click the **Display** category and make sure the **Update fields before printing** check box is selected.

Select the type of item for which you want to create a cross-reference. See the table below for more information.

Select the information you want to include in the cross-reference. See the table below for more information.
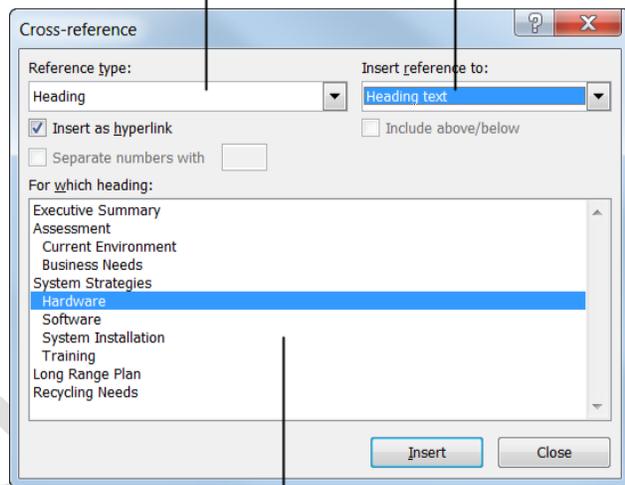
Select the item you want to cross-reference.

Figure 12-18: The Cross-reference dialog box.

Table 12-2: What Can Be Included in a Cross-Reference

You can cross-reference these items:	Cross-references can include this information:
Numbered Items Headings	Entire caption Example: See **Figure 3-2: Rainfall**.
Bookmarks Footnotes	Only label and number Example: See **Figure 3-2**.
Endnotes Equations	Page number Example: See **Page 10**.
Figures Tables	Only caption text Example: See **Rainfall**.

Creating a Table of Contents Using Heading Styles

Word can easily create a table of contents for your documents using the document's heading styles for the headings in the table of contents. For example, paragraphs formatted with the Heading 1 style would be main headings in the table of contents, and paragraphs formatted with the Heading 2 style would be sub-headings, and so on.

Mark text with built-in headings

The easiest way to create a table of contents is by applying built-in styles to the text you want to include in the table of contents.

☐ Select the heading to which you want to apply a heading style.

☐ Click the **Home** tab on the Ribbon. Select the heading you want to use in the Quick Style gallery in the Styles group.

The heading style is applied to the text.

✅ **Tip:** If you don't see the style that you want, click the **More** button to expand the Quick Style gallery.

Insert a built-in table of contents

Microsoft Word comes with built-in tables of contents. This is the simplest way to insert a table of contents in your document. However, you can't control how the table of contents appears as much as if you insert a different table of contents.

☐ Place the insertion point where you want the table of contents.

☐ Click the **References** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

A list of built-in tables of contents appears.

☐ Select the built-in table of contents you want to use.

The table of contents is inserted in the document.

Insert a table of contents

Inserting a table of contents this way allows you to control how the text of the table of contents appears, and other aspects, such as if page numbers appear.

▪ **Exercise**

☐ **Exercise File:** Proposal 12-9.docx

☐ **Exercise:** Insert a built-in table of contents at the bottom of the first page of the document. (Text has already been marked with heading styles.)

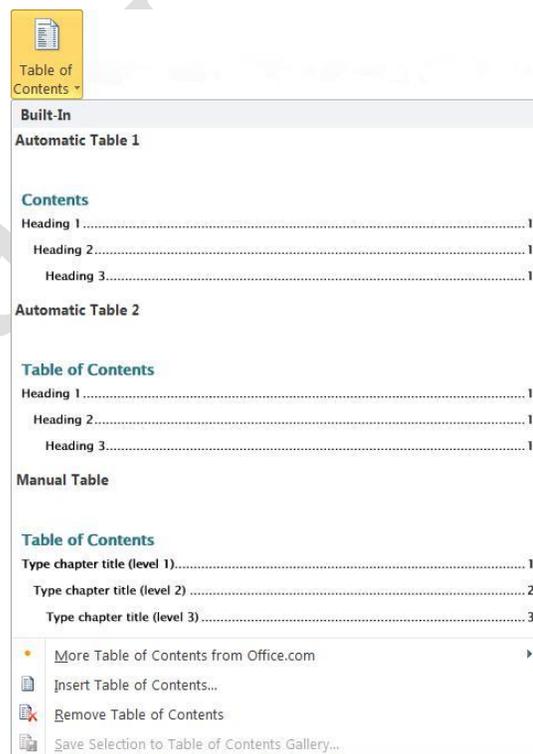**Figure 12-19:** An example of how the table of contents is compiled using heading styles.

Figure 12-20: Built-in table of contents. This is the easiest way to insert a table of contents.

☐ Place the insertion point where you want the table of contents to be.

This is probably near the beginning of the document.

☐ Click the **References** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

A list of table of contents options appears.

☐ Select **Insert Table of Contents** from the list.

The Table of Contents dialog box appears.

A preview of how the table of contents would look with the selected format appears in the Print Preview box. You can choose a different format for the table of contents.

☐ Click the **Formats** list arrow and select the format you want to use.

A preview of the format appears in the Print Preview area of the dialog box.

☐ Format the settings of the table of the contents.

A list of the different settings is described in the table to the right.

☐ Click **OK**.

The table of contents is inserted in the document.

Update the table of contents

If the content of the document changes, you can easily update the table of contents to include new and changed information.

☐ Click the **References** tab on the Ribbon and click the **Update Table** button in the Table of Contents group.

A dialog box appears, asking what you want to update.

☐ Click **Update page numbers only** or **Update entire table**. Click **OK**.

🔸 **Other Ways to Update the Table of Contents:** Right-click the table of contents and select **Update Field** from the contextual menu. Or, click anywhere in the table of contents and press **<F9>**. Or, if you're using a built-in table of contents, click the **Update Table** button on the Content Manager tab.
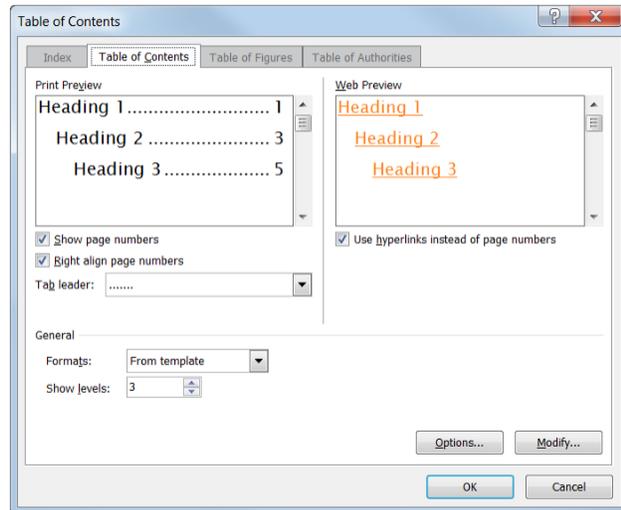

Figure 12-21: The Table of Contents tab of the Table of Contents dialog box.

Table 12-3: Table of Contents Dialog Box

Show page numbers	Check or uncheck this setting to include page numbers in the table of contents.
Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Show levels	Choose which outline levels you want to include in the document. You can display up to nine levels in the table of contents, according to the outline.
Options	Choose what you want the table of contents to be built from: styles, outline levels, or table entry fields.

Figure 12-22: The Update Table of Contents dialog box.

Creating a Table of Contents Using TC Entries

Most of the time you will want to create a table of contents using the heading style method, but there may be a time when you need to use something more advanced— using TC (table of contents) entries.

Inserting TC entries to indicate table of contents entries isn't nearly as fast as the heading style method, but it provides more flexibility. For example, if your document doesn't contain any heading styles or outline levels—but you still want a table of contents—use TC entries. Or, if you want to use text that is different from your document's heading styles in the table of contents, you would use TC entries to create a table of contents that uses the text you want.

There are several benefits to using a table of contents created with TC entries:

No styles are required.

> You can use several tables of contents that contain different information in the same document.

Create a table of contents entry

Mark text you want to include in the table of contents by assigning a level to it.

☐ Place the insertion point where you want to insert the table of contents entry.

> You can also select text that you want to create the table of contents entry from, and the text will appear in the table of contents dialog box.

☐ Press **<Alt>** + **<Shift>** + **<O>**.

> The Mark Table of Contents Entry text box appears. If you selected text before opening the dialog box, it appears in the Entry text box.

☐ Click the **Entry** text box and enter the text you want to appear in the table of contents.
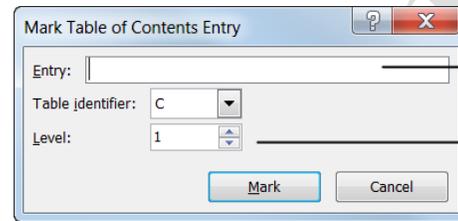
> There are two other specifications you need to make in the dialog box:

>> **Table identifier:** Assign the TC entry to a specific table in the document. For example, you could have a different table of contents for each section of a document.

>> **Level:** Assign a level to the text. Main headings are level 1, and so on.

Type what you want to appear in the table of contents entry.

Select the level of the table of contents entry.

Figure 12-23: The Mark Table of Contents Entry dialog box.

☐ Select the table and level settings you want to use and click **Mark**.

 The entry is inserted in the document.

☐ Click **Close**.

 The dialog box is closed.

Insert a table of contents from TC fields

Once the TC fields are inserted, you can create the table of contents from the TC fields. You may also change table settings so that it simply includes the TC entries with the rest of the table of contents.

☐ Place the insertion point where you want the table of contents.

☐ Click the **References** tab on the Ribbon and click the **Table of Contents** button in the Table of Contents group.

 A list of table of contents options appears.

☐ Select **Insert Table of Contents** from the list.

 The Table of Contents dialog box appears.

☐ Click **Options**.

 The Table of Contents Options dialog box appears. Select the check boxes for how you want to build the table of contents.

☐ Click the **Table entry fields** check box.

 You can also remove check boxes from the other options to avoid including them in the table of contents with the TC fields.

☐ Click **OK**.

☐ Click **OK**.

 The table of contents is inserted in the document.

Tips

▪ To insert table of contents with different table identifiers, insert the table of contents field. Select the table of contents field, right-click the field and select **Toggle Field Codes**. After the f switch in the code, enter the letter of the field identifier. For example, if you wanted all TC fields for table C to appear, the field would look like this:
{TOC \O "1-3" \f c} where "1-3" are the levels in the table of contents and "c" is the table identifier.
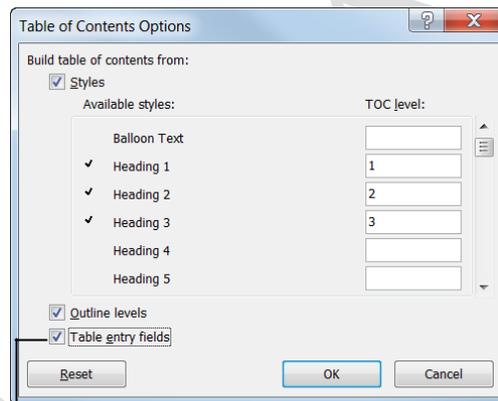
Builds a table of contents by using TC fields instead of, or in addition to, styles.

Figure 12-24: The Table of Contents Options dialog box.

Working with Picture Captions

Captions and tables of figures are a great way to organize and reference documents that have a lot of pictures.

Insert a picture caption

If you have diagrams or pictures in your document that you want to label and reference, inserting captions is one of the easiest ways to do this.

☐ Select the picture you want to caption.

☐ Click the **References** tab on the Ribbon and click the **Insert Caption** button in the Captions group.

   The Caption dialog box appears.

   By default, the caption label "Figure 1" appears in the Caption text box.

☐ Enter the caption after the text in the Caption text box.

   There are several different options you can use to change the caption settings in the dialog box. See the table to the right for more information about these settings.

☐ Click **OK**.

   The caption is inserted.

✅ Tips

▪ The number in the caption automatically updates if the picture is moved in the document.

Insert a table of figures

Once captions have been inserted, you can insert a table of figures. This is very similar to a table of contents: it displays each caption and the page on which that caption appears.

☐ Place the insertion point where you want the table of figures.

   This is probably near the beginning of the document.

☐ Click **References** tab on the Ribbon and click the **Insert Table of Figures** button in the Captions group.

   The Table of Figures dialog box appears.

   A preview of how the table of figures would look with the selected format appears in the Print Preview box. You can choose a different format for the table of contents.

▪ **Exercise**

☐ **Exercise File:** Proposal 12-11.docx

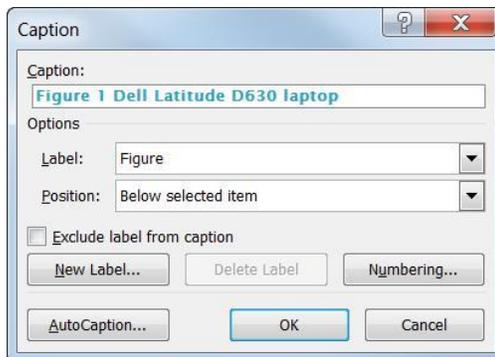☐ **Exercise:** Insert a caption that says, "Dell Latitude D630 laptop" under the laptop picture on page 5.

Figure 12-25: The Caption dialog box.

Table 12-4: Caption Options	
Label	Choose from three preset labels: Figure, Equation, Table.
Position	Insert the caption below or above the selected item.
Exclude label from caption	Select this check box so that only the text you enter is included with the picture. The label and number are not included.
New Label	Create a new label to choose from under the Label list arrow.
Delete Label	Remove a label you created under the New Label button.
Numbering	Change the numbering format of numbers in the caption labels. For example, include the chapter number in the label.
AutoCaption	Choose this option to automatically add a caption when certain items are inserted in the document.

☐ Click the **Formats** list arrow and select the format you want to use.

A preview of the format appears in the Print Preview area of the dialog box.

☐ Select the settings of the table of the figures.

A list of the different settings is described in the table to the right.

☐ Click **OK**.

The table of figures is inserted in the document.

Table 12-5: Table of Figures Settings

Show page numbers	Check or uncheck this setting to include page numbers in the table of figures.
Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Caption label	Choose text to appear in front of the caption: None, Equation, Figure, Table.
Include label and number	If this check box is not selected, only the text of the caption will appear in the table of figures. The captions will not be labeled or numbered.
Options	Choose what you want the table of contents to be built from: styles, outline levels, or table entry fields.

Creating an Index

An index can usually be found at the end of a document, and lists the words and phrases in a document, along with the page numbers they appear on. There are two steps involved in creating an index: defining which word(s) you want to appear in the index and then inserting the index.

Insert an index entry

To include a word or phrase in the index, you must mark it with an index entry.

☐ Select the text you want to include in the index.

You may also just place the insertion point where you want to insert the index entry and then enter the text in the dialog box.

☐ Click the **References** tab on the Ribbon and click the **Mark Entry** button in the Index group.

The Mark Index Entry dialog box appears.

🔶 **Other Ways to Mark an Index Entry:**
Press **<Alt>** + **<Shift>** + **<X>**.

☐ Select the type of index entry you want to insert.

There are three different types to choose from:

Cross-reference: Adds a cross-reference as an index entry instead of a page number.

Current page: Lists the current page number for the selected index entry. This is the default option.

Page range: Lists a range of pages that are included in the bookmark that you click in the Bookmark list. You must first mark the range of pages with a bookmark.

☐ Click **Mark** or **Mark All**.

Mark All marks every occurrence of the text in the document as index entries, whereas Mark only includes an entry for the single occurrence.

✅ **Tip:** Be careful if you use Mark All—you may end up with a lot of meaningless index entries that you really didn't want.

☐ Click **Close** when you are finished marking entries.

The dialog box closes.

✅Tips

▪ Index entries are invisible and will not be printed. However, you can see them when the Show/Hide All button is set to Show All.


▪ **Exercise**

☐ **Exercise File:** Proposal 12-12.docx

☐ **Exercise:** Create an index entry for the "Hardware" heading on page 4. Create an index entry for all instances of "Windows 7".
Insert a one-column modern index at the end of the document.
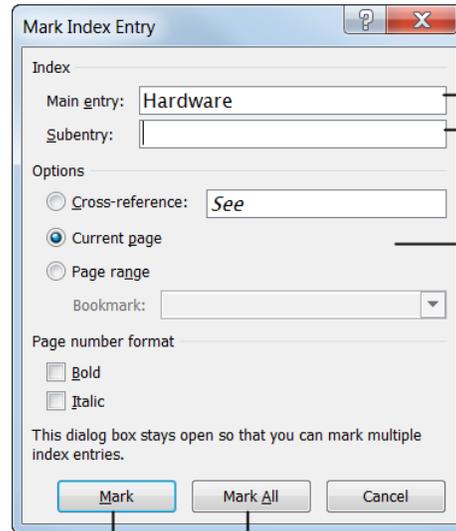
The text that will appear in the Index goes here.

Enter index subentries here.

Specify the type of index entry you want to create. Current page is the most common option.

Marks the index entry you selected.

Marks all occurrences of the text in the document. Use with caution!

Figure 12-26: The Mark Index Entry dialog box.
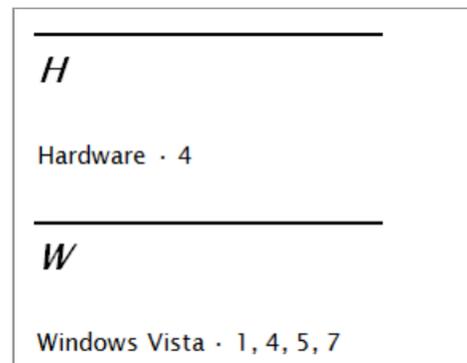
**Figure 12-27:** A preview a one-column index in modern format.

Insert an index

Once index entries have been inserted, you're ready to insert the index.

☐ Place your insertion point where you want to insert the index.

Usually you will want to insert the index at the end of the document.

☐ Click the **References** tab on the Ribbon and click the **Insert Index** button in the Index group.

The Index dialog box appears.

☐ Specify formatting options for the index.

There are several options for specifying how the index will appear in the document, such as the Formats list, which changes the formatting of the index.

☐ Click **OK**.

The index is inserted in the document.

Table 12-6: Index Settings

Right align page numbers	If this setting is not selected, the page numbers will be shown right after the heading in the table of contents.
Tab leader	Select a dotted, dash, or line tab leader between the heading and the page number.
Formats	Select how the formatting of the table of contents appears in the document.
Type	Select whether you want each sub entry to be indented under the primary entry, or if you want to consolidate the entries into one sentence.
Columns	Select how many columns you want to appear in the index.
Language	Select the language for the table of contents.

Select how many columns you want to appear in the index.

Select how you want the index to be formatted.
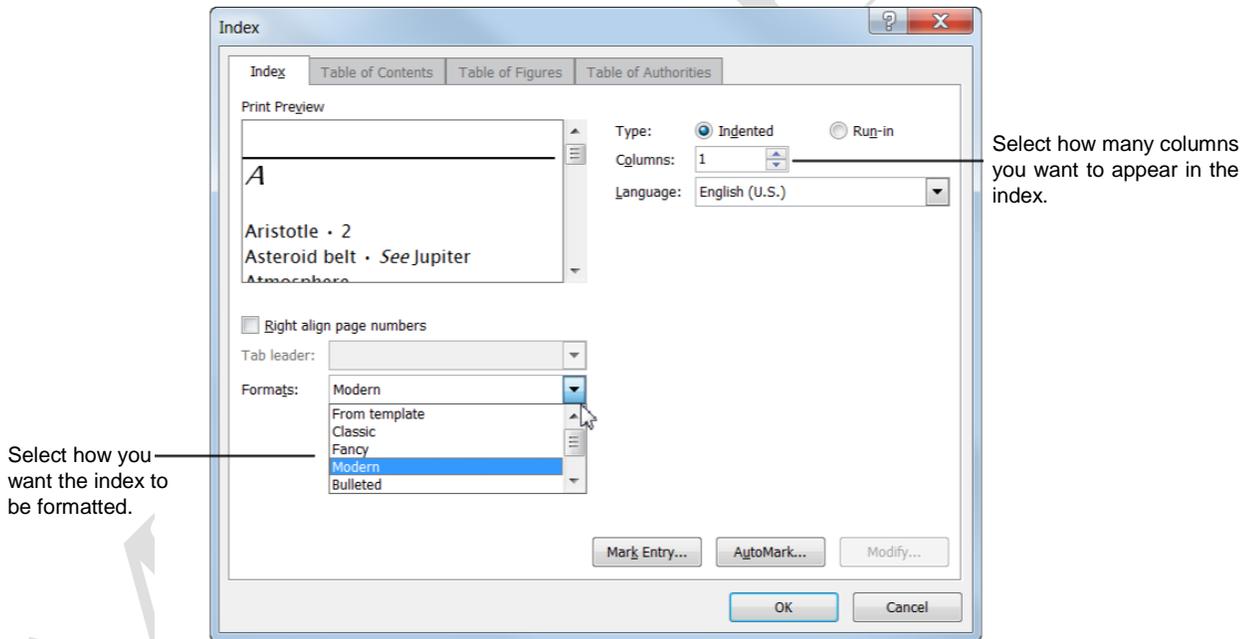
Figure 12-28: The Index dialog box.

Using Footnotes and Endnotes

You're probably already familiar with footnotes and/or endnotes if you have ever had to write a paper for an English class. Footnotes and endnotes explain, comment on, or provide references for text in a document. Footnotes appear at the bottom, or the foot, of each page in a document, while endnotes appear at the end of a document. Other than that, they work the same way.

Footnotes and endnotes have two linked parts: the note reference mark (usually a number) and the corresponding footnote or endnote. Word automatically numbers footnote and endnote marks for you, so when you add, delete, or move notes, they are automatically re-numbered.

Insert a footnote

A footnote appears on the same page as the text it explains.

☐ Place the insertion point where you want to insert the footnote.

☐ Click the **References** tab on the Ribbon and click the **Insert Footnote** button in the Footnotes group.

Word inserts a footnote number at the insertion point and moves the insertion point to the bottom of the page, where you can type the footnote.

☐ Type the footnote in the footnote

area. The footnote is inserted.

Insert an endnote

An endnote appears at the end of the section or document.

☐ Place the insertion point where you want to insert the endnote.

☐ Click the **References** tab on the Ribbon and click the **Insert Endnote** button in the Footnotes group.

Word inserts an endnote number at the insertion point and moves the insertion point to the bottom of the page, where you can type the endnote.

☐ Type the endnote in the endnote

area. The endnote is inserted.

▪ **Exercise**

☐ **Exercise File:** Proposal 12-13.docx

☐ **Exercise:** Insert a footnote after the text "Network Internet Connection" on page 4 that says, "Using Fast-Connect as an Internet Service Provider." Edit the footnote so it reads, "Using Quick-Connect as an Internet Service Provider." View the footnote, then delete it.
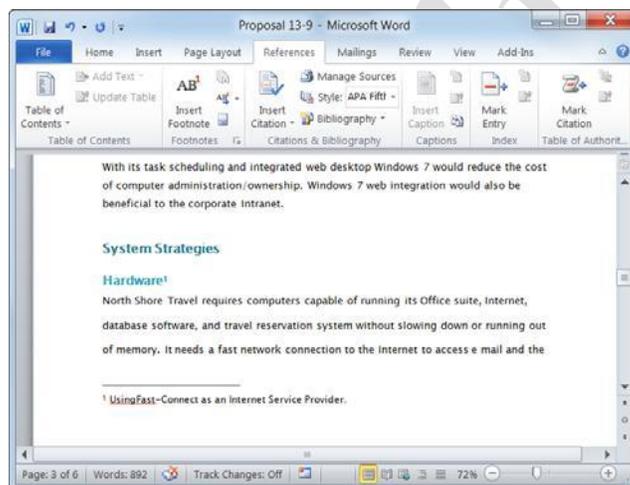
Figure 12-29: A footnote is inserted at the bottom of the page in a document.

View a footnote or endnote

You don't have to scroll down to the bottom of the page or the end of the document to view what a footnote or endnote says.

Position the pointer over the footnote or endnote number for several moments.

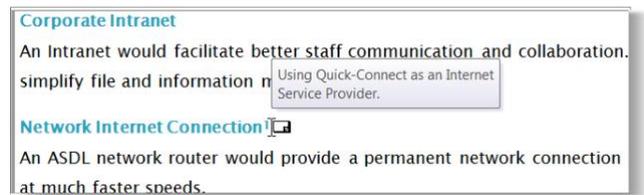The contents of the footnote or endnote appear in a small pop-up window.

Edit a footnote or endnote

You don't have to scroll down to the bottom of the page or the end of the document to edit a footnote or endnote.

☐ Double-click the footnote or endnote number.

Word jumps to the footnote text.

☐ Edit the text in the footnote or endnote.

Once the text is edited, you can return to the rest of the document.

Delete a footnote or endnote

Deleting a footnote or endnote is easy.

Select the footnote or endnote number and press the **<Delete>** key.

The footnote or endnote number and reference are deleted.

✅ **Tips**

▪ Click the dialog box launcher in the Footnotes group to open the Footnote & Endnote dialog box.

Figure 12-30: A preview of the footnote in the document.

Using Citations and Bibliographies

Academic papers rely on citing the sources of research. This lesson shows how Word can make citing sources and creating a bibliography very easy.

Add a source to the Source Manager

When sources are entered for the document, the information is saved so that it is easy to cite the source again, and it's also easy to compile the bibliography.

☐ Place the insertion point where you want to insert the citation.

☐ Click the **References** tab on the Ribbon and click the **Insert Citation** button in the Citations & Bibliography group.

☐ Select **Add New Source**.

The Create Source dialog box appears.

✅ **Tip:** Select **Add New Placeholder** to insert a citation and add the source information later. Be sure to insert the same numbered placeholder for citations that use the same source. Edit the placeholder's information in the Source Manager.

☐ Enter the source information in the dialog box.

☐ Click **OK**.

A citation is inserted in the document where the insertion point is located. The source is also saved, so it can be cited again in the document and included in the bibliography.

Open the Source Manager

When a source is added, it is saved in the Master List for sources. That means the source will be available in other documents as well. Just copy the source from the Master List into the Current List in the Source Manager.

Click the **References** tab on the Ribbon and click the **Manage Sources** button in the Citations & Bibliography group.

Insert a citation from the Source Manager

Once the source has been inserted, it is easy to insert citations from the source.

☐ Position the insertion point where you want to insert the citation.

Figure 12-31: Creating a new source in the Edit Source dialog box.

The Source Manager stores and keeps track of all sources created in Word. The Master List (left column) saves all sources that have ever been added. The Current List (right column) includes sources that can be cited in the current document.

Figure 12-32: The Source Manager stores and keeps track of all sources created in Word.

☐ Click the **References** tab on the Ribbon and click the **Insert Citation** button in the Citations & Bibliography group.

A list of citations already inserted in the document appear.

✅ **Tip:** Select **Add New Source** if no sources have been created.

☐ Select the citation you want to reference.

The citation is inserted in the document.

Insert a bibliography

Once you have cited sources in the document, you can create a bibliography that contains all the sources in the Current List of the Source Manager.

Figure 12-33: Select a citation from the list.

☐ Navigate to the location where you want to insert the bibliography.

Most likely, you'll want to insert the bibliography at the end of the document.

☐ Click the **References** tab on the Ribbon and click the **Bibliography** button in the Citations & Bibliography group.

A list of built-in options appears. You can choose either of these built-in options to insert the bibliography with heading text and formatting. Or, select Insert Bibliography to insert only the sources.

☐ Select the built-in bibliography you want to insert.

The cited sources are inserted in the document.

✅ **Tip:** Select **Insert Bibliography** to open the Bibliography dialog box and create your own bibliography.

✅ Tips

▪ If buttons are grayed out in the Citations & Bibliography group, there may be a problem with your installation of Word. Repair Office through Programs and Features in the Control Panel.
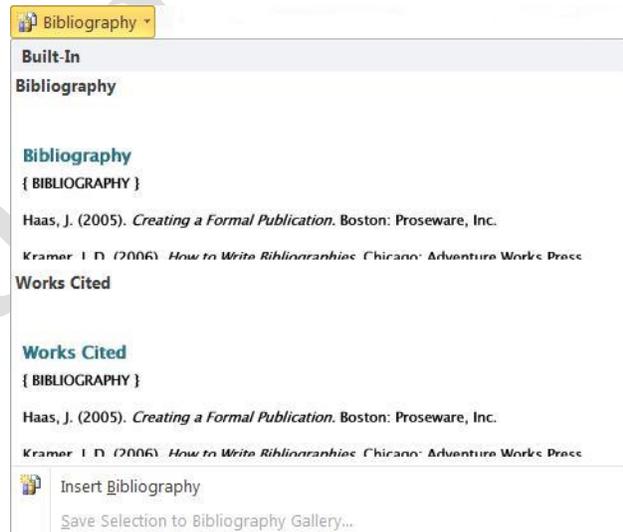
Figure 12-34: Select a built-in bibliography or click Insert Bibliography to create your own.

Reference: **CustomGuide**
Online Learning