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Cross References:
How To Setup and Use Cross References

Contents

Overview

This document is intented to educate the user on Cross References and how to use them within an OpenOffice.org Writer document.
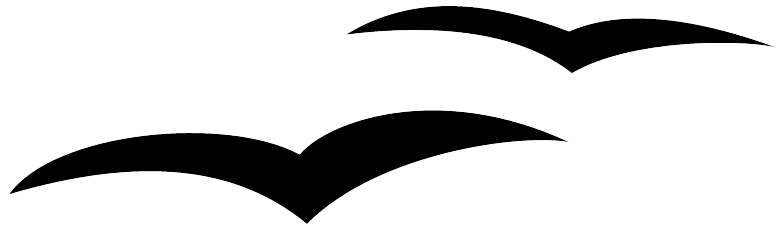
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Acknowledgments

My wife for allowing me to work on this.

Modifications and updates

Version	Date	Description of Change
0.1	05/11/04	Rough Draft
0.2	03/06/04	Generalized document to include bookmarks and number range variables, with a table comparing these. Also included references to open source macros that makes working with references easier. A note about hyperlinks and another about sections.

Using Cross-References

Cross References are used to refer to a location of a portion of text or to replicate a portion of text.

Typical uses of cross-references are to:

- Reference Headings
- Reference tables, figures etc
- To keep track of multiple references to an Entity, Person, Place, or Event

The user creates a Cross-reference source once, and then creates in Writer references to that source by selecting the reference source from a list instead of manually typing it. This will create a link between the original reference source and all future references. Any changes to the original reference source will be reflected in the cross-references.

Cross-reference Sources

There are three sources for cross references:

- Set references
- Bookmarks
- Number range variables

For a comparison of reference sources see Table 1 below.

Table 1 Comparison of reference sources: set references, bookmarks and variables

	Set Reference	*Bookmark*	*Number range Variables*
Updating references to it	Automatic	Press F9	Automatic
Highlighting	With field shadings turned on	Never	With field shadings turned on
Hyperlink to it	No	Yes	No – but can hyperlink to objects that may be captioned
Jump to reference source by clicking on reference in .sxw	Yes	Yes	Yes
Rename	No	Yes but doesn't change references to the bookmark so these are left orphaned	No
Delete	No	Yes but references to it left orphaned	No
In navigator	Yes	Yes	No
On deleting text that contains it	Removed but references to it left orphaned	Removed but references to it left orphaned	Removed but references to it left orphaned
Reliably moves as document changes	Yes	? (Some people have commented that it is unreliable)	Yes
Page (the page number in arabic numerals)	Yes	Yes	Yes
Chapter (The number of the outline numbered paragraph)	Yes	Yes	Yes
Reference	The text highlighted by the set reference	The text contained within the bookmark	The text of the entire paragraph that contains the variable
Above/Below	Yes	Yes	Yes
As page style (The page number as displayed)	Yes	Yes	Yes
Category and number	No	No	The text to the left of the variable and the variable's value
Caption text	No	No	Text to the right of the variable in the paragraph
Numbering	No	No	The value of the variable.

How Do I Create a Set Reference?

To create a Set Reference:

1. Enter the Text you would like to use as a Cross Reference.

2. Highlight the Text that is to be a Cross Reference.

3. Click **Insert -> Cross Reference**.

4. In the Type list box: Select Set Reference.

5. In the Name Field: Enter a Name for this Cross Reference.

6. Click Insert.

7. Click Close.

You now have a Set Reference setup. If View > Field Shadings is ticked you will notice that the text that you highlighted has a grey background now. This indicates that set references are considered a field. The advantage to you is that you know exactly what is being referenced.

How Do I Create a Bookmark?

To create a Bookmark:

1. Enter the Text you would like to use as a bookmark.

2. Highlight the Text that is to be a Bookmark.

3. Click **Insert -> Bookmark**...

4. In the text field: Enter a Name for this bookmark.

5. Click OK.

You now have a bookmark setup.

How Do I Create a Number range Variable?

Number range variables are used in three main ways:

    1) In captions

    2) User defined

    3) Numbering equations

Inserting a caption

To insert a caption:

1. Select the object (table, graphic, etc.) that you wish to caption.

2. Click **Insert -> Caption**...

3. Select or type in a new category for this object.

4. Enter a caption for this object.

5. See help for more details on other options in the dialog

6. Click OK.

You now have a number range variable setup for the caption that can be cross referenced.

Defining a Number range variable

Sometimes you may want similar functionality of caption numbers, an automatically incrementing number, but they aren't related to captions.

To define a variable:

1. Position the cursor where the variable is to go

2. Click **Insert -> Fields > Other**... (or Control + F2)

3. Select the Variables tab

4. For type select Number range

5. Either select an existing selection or type in a new Name

6. You can optionally give it a specific value (if you want to start at something other than one)

7. Choose format

8. If you want to include outline numbering specify the level to include and the seperator character

9. Click Insert.

You now have a user defined number range variable setup.

Numbering Equations

There is a preconfigured autotext entry for equations which uses a number range variable called Text. To check this out type fn then press F3.

How Do I create a Cross Reference to a reference source?

1. Place the Cursor where you want the Cross Reference to appear in your text.

2. Click **Insert -> Cross Reference**.

3. In the **Type** list box: Select Insert Reference, bookmark, or the name of the Number range variable.

4. In the **Selection** list box: Select the Cross Reference you want to insert

5. In the **Format** list box: Select the format desired. For more detail see the bottom of Table 1 on page 2 above.

6. Click the **Insert** button.

How Do I Change the Text in a Cross Reference?

To change a Cross References text, you have to change the original reference. To find the original reference click on a Reference you want to change. The document may shift while it locates the original reference.

The cursor should appear at the beginning of the Reference.

Now you can change the text of the Cross Reference. For set references with field shading turned on you can see the extent of the set reference. For bookmarks it is not obvious, so you may want to check that the text is contained within the bookmark by double clicking on its name in the Navigator. For number range variables it is the text of the paragraph that contains the number range (see the bottom of Table 1 on page 2 above.)

Once you are finished with updating the reference, press F9 to update the document with changes to fields. You can check any of the other locations in your document to make sure everything is working properly.

References versus Hyperlinks

A reference is a way of having text entered once and to be able to refer to the location of that text (e.g. page number, above/below, chapter) or to repeat the content of the referred to text (e.g. reference). As a by product within Writer by clicking on a reference the cursor will jump to the reference source. However, when saving in HTML format or exporting as PDF (using the extended PDF converter macro) these are not hyperlinks and so they are not links in these formats.

Hyperlinks are for jumping to another location (whether in the same document or somewhere completely different on the web) and the text of a hyperlink can be whatever you want it to be and thus they are not updated when the source changes. A way of combining the two functions within a document can be achieved by using bookmarks in the following way:

1) Select a portion of text that you wish to be the target of a hyperlink and to contain the text of the reference to it.

2) Insert > Bookmark... > name > OK

3) Position the cursor where you want the hyperlink to go

4) Insert > Cross-reference... > Bookmarks > name > Reference > Insert > Close

5) Select the reference you have just created

6) Create the hyperlink by:

7) Insert > Hyperlink

8) Click the target in document button to the right of the Target text field, click the plus to the left of bookmark and select name. Alternatively, simply type the name into the

target text field box.

9) Click apply.

10) Now when the text that is within the bounds of the bookmark is updated, the hyperlink text will also update when F9 is pressed.

Managing set references and bookmarks

As can be seen in Table 1 there are a number of issues and differences when dealing with references. Deleting and renaming of set references and bookmarks can cause orphans (references without a source). Due to differences in what can be done with each it maybe convenient to change from using set references to bookmarks or bookmarks to set references. To help with these issues there is an open source macro available from http://homepages.paradise.net.nz/hillview/OOo/ in a document called ReferenceManager.sxw. This document explains how to use the macro.

Reference Headings

Current versions of OpenOffice.org do not have the ability to directly cross-reference headings. To get around this insert set references for the headings and then create cross-references to them. A more user friendly approach is planned for OOo 2.0 but in the mean time there is an open source macro available from http://homepages.paradise.net.nz/hillview/OOo/ in a document called OutlineCrossRef.sxw. This document describes how to use the macro including how to cross reference headings of sub documents of a master document.

Referencing sections

It is also possible to reference sections of either the current document or another document. An example of where this would be useful is legal documents.

Often legal documents have very similar chunks of text. By using this feature you can create links to documents so that by updating the one document all other documents with section links will be updated as well.

To prevent updating a link (so that you don't have the experience of "I thought I changed that") it is possible to lock the link.

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