

Using EndNote with Master Documents

This session is not a tutorial on using the Master Document facility of Microsoft Word, nor an endorsement of the product. **If you search the web there are many reports and warnings about the tendency of Master Documents to corrupt.** Forewarned is forearmed. However if you *are* using Master Documents we can show you how to use EndNote to insert your bibliography in the place you want it.

Things to think about before choosing to use Master Documents.


If you are writing a long document such as a thesis or book you need to choose between using a Master Document and creating one single long document. While Master Documents may be prone to corruption, a single long document can cause navigation difficulties. Navigation difficulties can be managed with the Document Map facility in Word, and by consistent use of section headings.

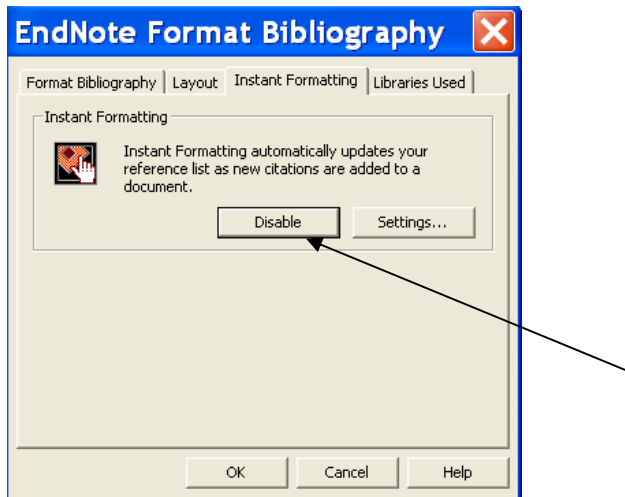
For an excellent guide to working with Master Documents, go to the University of Melbourne site at <http://www.infodiv.unimelb.edu.au/telars/flds/basickit.html>.

Macquarie University also has a comprehensive **guide to managing long theses** at <http://www.lib.mq.edu.au/training/notes/ThesisFormatting2.pdf>

For an **Interactive Training Module** try Microsoft Word 2000 Advanced Module on **Southern Cross University's Computing site** at <http://study.scu.edu.au/casc/>. There are sections on Master Documents. It will show you how to set up templates with font sizes and headings.

Some general rules for using Master Documents and EndNote

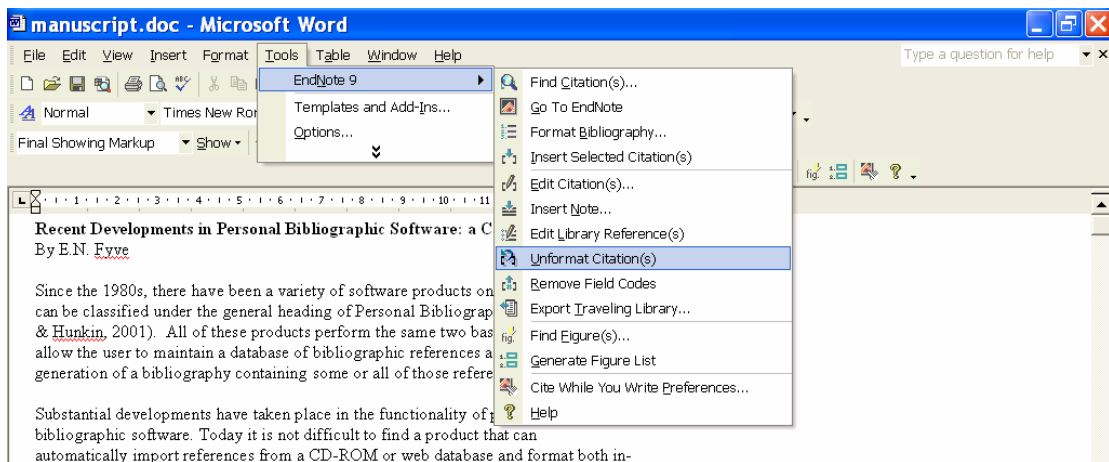
1. Set up a template and use this for all documents and sub-documents with heading sizes, margins, fonts etc.
2. Work with a set of documents, one for each constituent part of the major work. Give these documents consistent names eg. chapter1.doc. Use a sub-document for each chapter. **Do not try to merge them into one large document or a Master Document until all chapters are complete.**
3. Save all documents in the same folder.
4. Backup frequently, and on as many different computers / drives / CD's / floppies as possible. Backup the library (.enl) file as well – this is a part of your work. Keep in different locations – work / home etc.
5. When inserting references into your subdocuments from EndNote you may use the **Cite While You Write** function but if you do you will need to unformat all of your sub-documents before integrating them into a large document or Master Document. To disable the Instant Formatting function which is the default for Cite-While-You-Write click on the **Format Bibliography** icon  and choose the Instant Formatting window. Click on **Disable**.



Later we can Format the Bibliography where we want it in the Master Document, and hence position the full bibliography at the end.

If you have been using Cite While You Write for the chapters and want to Unformat your document prior to insertion into a Long Document or Master Document follow this procedure.


Position your cursor anywhere in the document but not highlighting any particular inserted reference. Click on **Tools>EndNote 9>Unformat Citations**. The bibliography at the end will disappear and the in-text citations will then look like this (Harvard Style example) : {Pratt, 1995 #10}



6. The same applies to Headers and Footers and page numbers – you can insert them while working in the sub-documents, but they will need to be removed before the final integration.
7. When you are in the Master Document and are exiting from sub-documents at any time, use **File>Close** from the menu rather than clicking the **X** button in the right hand window.

Exercise

For this exercise we will set up a Master Document and insert a couple of sample sub-documents from our training disk on A:Drive.

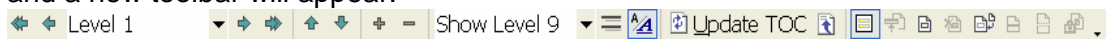
1. **Begin by inserting your references into the subdocuments.** In Microsoft Word open the documents **chapter1.doc** and **chapter2.doc** from the **A: Drive**. As in step 5 above click on  and disable the Instant Formatting option. Insert the references as indicated by the red text boxes. Your reference should look like this temporary citation {Pratt, 1995 #10}. **Save** the documents and **File>Close** them.

2. **Open a New blank Document** in Microsoft Word.

3. Create several blank paragraphs by pressing the **Enter** on your keyboard. It is easier to do this at the beginning as later it can be difficult to insert them.

4. Save the Master Document in the same Directory as the subdocuments you are using. For the training exercise you will be saving to A:Drive. Give it a name such as a:\thesis\master.doc.

5. From the **File** menu select the **Outline** option. The appearance of the screen will change and a new toolbar will appear:




The arrow buttons allow you to move text and headings around in the document, and to apply style to text. The Show Level **Show Level 1** selector allows you to look at different levels of your heading and text. For example, selecting **Show Level 1** will display text at the **Heading 1** level only. Clicking on **All** button displays all headings and all text. Clicking on the **+** sign expands a sub-document. The last group of buttons



control the Master Document functions: adding and removing documents from the Master; merge or split documents, and more.


6. **Lets insert some sub-documents.** Place the cursor in a paragraph, making sure that there are blank paragraphs above and below.


7. From the **Outline** toolbar select the **Insert Subdocument** button .

8. An open file dialog box appears asking you to locate the document you wish to insert. You now open **Chapter1.doc**, which you will find on your A:Drive.

9. Repeat the exercise for **Chapter2.doc**, **first making sure that you have a blank paragraph above and below your insertion point.** (We need a blank paragraph at the end of the document for the Bibliography).

10. Now we will add the bibliography at the end of the document. Position your cursor in the blank paragraph below your last chapter. Make sure that *teaching.enl* is open in EndNote.

11. In order to create the Bibliography, you will need to be in Normal View , as EndNote does not like to create a Bibliography in Print Layout or Outline View.

12. From the EndNote Add-in Toolbar click on Format Bibliography  and choose the Style for your bibliography then click **OK**. It should now appear at the end of your Master

Document. If you wish you may change the Style by repeating the process above and selecting a different Style.

USEFUL WEBSITES

Master Documents

University of Melbourne Master Documents in Word

<http://www.infodiv.unimelb.edu.au/telars/flds/basickit.html>

Macquarie University Guide to Managing Long Theses

<http://www.lib.mq.edu.au/training/notes/ThesisFormatting2.pdf>

Styles

Teach Yourself to Create Output Styles using EndNote 6 or 7

<http://www.library.uq.edu.au/endnote/stylestutorial6/contents.html>

Customising Reference Types

Central Queensland University Edit and Create Reference Types

<http://www.library.cqu.edu.au/services/staff-research/endnote/training/reftypesv7.pdf>

General

QUT Online Tutorials

<http://www.library.qut.edu.au/endnote/tutorials.jsp> Try the

Advanced Tutorial for more on how to import from or direct export from Library Databases.

University of Wollongong Online Tutorial

<http://www-library.uow.edu.au/helptraining/tutorials/endnote/index.html>

Journal Abbreviation Lists

University of Queensland

Medical Journal titles http://www.library.uq.edu.au/endnote/medical_journal_titles_6.html

BIOSIS Journal Terms List and Chemical Abstracts (CASSI) Terms List

http://www.library.uq.edu.au/faqs/endnote/biological_journal_titles_6.html

Southern Cross University Library 2006

The library acknowledges the use of Training Materials from the University of Wollongong Library and University of Queensland.