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USING THE AUSTRALIAN GUIDE TO LEGAL CITATION (3rd edition) WITH ENDNOTE X6

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1. INTRODUCTION

1.1 About this Guide

This guide aims to teach you practical techniques for using the *Australian Guide to Legal Citation* (3rd edition) with EndNote. EndNote cannot meet all the complex requirements of legal citation styles. It does however have limited capacity to format legal citations, and it is useful as a database for storing citations. This guide will show you what EndNote can and cannot do.

We assume that you have a basic familiarity with EndNote. If you have not yet familiarised yourself with EndNote, look at the video tutorials and other resources on the EndNote website at <http://endnote.com/training> and browse the *Getting Started Guide*, a PDF file which is installed on your computer along with the software.

We also assume that you are familiar with the requirements of the third edition (2010) of the *Australian Guide to Legal Citation*. It can be viewed on the web at: <http://mulr.law.unimelb.edu.au/go/AGLC3>

This guide refers to the Windows version of the EndNote software. The information is also relevant to **Macintosh** users, with only minor variations.

1.2 Terminology

The following terms are used in this guide:

"AGLC3" – *Australian Guide to Legal Citation*, 3rd edition (Melbourne: Melbourne University Law Review Association, 2010)

"the output style" – the EndNote output style for the third edition of the *Australian Guide to Legal Citation* which can be downloaded from the University of Queensland Library website (see 1.3 below).

1.3 Downloading the Output Style

The EndNote output style to be used with this guide can be downloaded from the University of Queensland Library website at:

<http://www.library.uq.edu.au/research-support/output-styles>

Note that there are two versions of the style:

- **Footnotes Only** Use this version for writing short documents which do not require a bibliography at the end.
- **Footnotes plus Bibliography** Use this version for writing longer works which require a bibliography at the end. For works divided into chapters you will need to use a combination of both styles: see 5.2 below.

Follow the instructions on the webpage to download one or both versions of the style. Note that the downloaded file should be saved in your personal EndNote Styles folder. For more information on folder locations see:

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

The style file can be used on a **Windows or Macintosh** computer.

Once you have downloaded the style, mark it as one of your favourites. To do this, go to EndNote, and click on **Edit** on the menu bar. Then click on **Output Styles>Open Style Manager**. This will display all the styles in your Styles folder. Find the AGLC3 output style which you downloaded, and check the box beside it to mark it. Close the Style Manager by clicking on the **X** button in the top right-hand corner of the Style Manager window.

2. SETTING UP A CUSTOM REFERENCE TYPE

2.1 Why a Custom Reference Type?

The output style that you have downloaded does **not** make use of the EndNote legal reference types (Hearing, Bill, Statute, Case, Legal Rule/Regulation), and if you have entered data in your EndNote library using those reference types, the output style will not format them. The reason for this is that the formatting of a citation for a statute, case, etc. varies according to the jurisdiction. So you would need reference types for Australian Statute, UK Statute, Canadian Statute, US Statute, etc.

Instead, the output style uses a single **Legal** reference type. Using this reference type, you must enter the citation formatted according to AGLC3 (see 3.13 below). This reference type is a custom reference type which you must now set up. Follow *exactly* the instructions given below. The output style will not format your references correctly unless the Legal reference type is set up as shown here.

2.2 How to Set Up the Legal Reference Type

You have two options:

- Download a file from the UQ Library website which will automatically set up the **Legal** reference type. This is the *recommended option*, but it will overwrite any

modifications which you have already made to your EndNote reference types. See 2.3 below.

- Modify the reference types in EndNote yourself. This requires more time, but it will preserve any modifications which you have already made to your EndNote reference types. See 2.4 below.

2.3 Downloading the RefTypeTable File

This is the easiest way to configure EndNote so that you can use the custom **Legal** reference type.

Use your web browser to display the following page:

http://www.library.uq.edu.au/faqs/endnote/aglc/aglc3_reftypes_ENX6.xml

Use your browser's **Save As** function to save the page to your computer. You must save it as an XML file.

In EndNote, click on **Edit** on the menu bar, and then select **Preferences**. When the EndNote Preferences window opens, click on **Reference Types** in the left-hand pane.

Now click on the **Import** button in the right-hand pane. Locate the XML file that you downloaded, and click on the **Open** button.

EndNote will import the file and modify the reference types automatically. Click on **OK** to close the EndNote Preferences window.

If you have an EndNote library open, you must close it and then reopen it for the changes to take effect. If you use the **New Reference** command, you will see that only a limited number of reference types are available, and one of these is the **Legal** reference type.

2.4 Modifying the Reference Types

This is the *alternative procedure* if you have *not* downloaded the RefTypeTable file as explained in 2.3 above.

This procedure will allow you to keep any modifications which you have already made to the EndNote reference types. Bear in mind that the output style will ignore any of those modifications: it is only configured to format the reference types described in this guide.

Click on **Edit** on the menu bar. Then click on **Preferences**.

When the EndNote Preferences window opens, click on **Reference Types** in the left-hand frame. Now in the right-hand pane, click on the **Modify Reference Types** button.

This will open the Modify Reference Types window. The output style is configured to format a custom reference type in place of the **Unused 1** reference type.

In the **Reference Type** box at the top of the window, use the drop-down menu to select **Unused 1**. This will display the blank Unused 1 reference type.

Click in the top box and change Unused 1 to **Legal**.

In the box which corresponds to Year in the Generic reference type insert **Year**.

In the box below (the Generic Title field) type **AGLC Citation**.

In the box below (the Generic Secondary Author field) type **Jurisdiction**.

Scroll down to the box that corresponds to the Generic Short Title field and type **Short Title**.

Scroll down to the box that corresponds to the Generic Label field and type **Label**.

Fill in the next six boxes with the same names as the Generic reference type: **Keywords, Abstract, Notes, Research Notes, URL, File Attachments**.

It is essential that you enter this data correctly. The output style will not format your references if you have not set up the reference type correctly. If you scroll through all the fields, they should look like this:

Generic	Legal
Author	
Year	Year
Title	AGLC Citation
Secondary Author	Jurisdiction
Secondary Title	
Place Published	
Publisher	
Volume	
Number of Volumes	
Number	
Pages	
Section	
Tertiary Author	
Tertiary Title	
Edition	
Date	
Type of Work	

Subsidiary Author	
Short Title	Short Title
Alternate Title	
ISBN/ISSN	
DOI	
Original Publication	
Reprint Edition	
Reviewed Item	
Custom 1	
Custom 2	
Custom 3	
Custom 4	
Custom 5	
Custom 6	
Custom 7	
Custom 8	
Accession Number	
Call Number	
Label	Label
Keywords	Keywords
Abstract	Abstract
Notes	Notes
Research Notes	Research Notes
URL	URL
File Attachments	File Attachments
Author Address	
Image	
Caption	
Access Date	
Translated Author	
Translated Title	
Name of Database	
Database Provider	
Language	

Legal Reference Type

Once you have entered the fields shown above, you can enter additional fields for your own use, if you want to. Bear in mind that the output style will ignore any data entered in such fields.

Click on the **OK** button to confirm these changes.

This will return you to the EndNote Preferences window. Click on the **OK** button to close this window.

3. ENTERING DATA INTO YOUR LIBRARY

3.1 "Garbage In, Garbage Out"

For the output style to format your references correctly, the data must be entered correctly in your EndNote library. The following sections explain how to do this. First you will find instructions which are applicable to all types of references, and then further information for specific reference types.

The output style will only format data which has been entered in the fields listed in 3.2-3.13 below. You can enter data in other fields, but that data will not appear in the formatted reference in your document. You can, of course, edit the output style to include data from other fields.

When you open a New Reference window so that you can insert data, the default reference type is Journal Article. If you are entering many references which are not journal articles, you can save time by changing the default reference type. To do this, click on **Edit** on the menu bar. Then click on **Preferences**. When the Preferences window opens, select **Reference Types** in the left-hand frame. You will now be able to change the Default Reference Type using the drop-down menu on the right-hand side.

3.2 All Reference Types

3.2.1 Author

Enter the author's name as it appears on the publication. Note that initials should be entered with spaces and no stops, e.g.

Campbell, Enid

Hart, H L A

Include 'Sir', 'Dame', peerage titles and judicial titles (AGLC3 1.14.1, 1.14.4) in the author field, e.g.

Mason, Sir Anthony

Kirby, Justice Michael

The output style will correctly format author names which include such titles. However if you format your references with certain other output styles, the title will be regarded as a forename and will be formatted accordingly.

If there is more than one author, enter each author on a *separate line*. We recommend that you enter the names of all authors, as some other bibliographic styles require that all authors be listed. If there are more than three authors, the output style will just list the first author, followed by 'et al'.

If the author is a *corporate body* (e.g. a Law Reform Commission or other government agency), enter the name of the body in the Author field, without abbreviation. Remember that EndNote requires that all names of corporate authors should be *followed by a comma*. Example:

Victorian Law Reform Commission,

The final comma will not appear in the formatted reference unless required.

However, if there is a comma *within* the corporate name, the comma should be duplicated, and no final comma is required. Examples:

Law Reform Committee,, Parliament of Victoria

Commonwealth,, Royal Commission into Aboriginal Deaths in Custody

The redundant comma will not appear in the formatted reference.

3.2.2 Label

This field is optional unless you want EndNote to create a bibliography at the end of your work. If this is the case, see 5.1 below for instructions on entering data in this field.

3.2.3 Pinpoint Citations

If you wish to cite particular pages, paragraphs or sections of the item referred to in your reference, you can store that information in the Notes or Research Notes field of the reference. These fields can each contain the equivalent of up to sixteen pages of text. If that is not enough, you can also use the Abstract field, which can also store up to sixteen pages of text.

You can use this data when inserting pinpoint citations in your footnotes (see 4.3 below).

3.3 Journal Article

For journal articles which are available *only on the web*, use the Electronic Article reference type (3.12 below).


3.3.1 Author

See 3.2.1 above.

3.3.2 Year

Enter the year of publication in this field. However see the note on Volume below (3.3.5).

3.3.3 Title

Enter the title of the article in this field. Capitalise the first word and all other significant words. Do not enclose the title in quotation marks: the output style will do this for you. If the name of a case or statute is included as part of the title, you must *italicise the case or statute name* when entering the title. Highlight the case or statute name and click on the Italics button  on the toolbar at the top of the New Reference window. (Alternatively, use the standard shortcut **Ctrl+I** to italicise text.)

3.3.4 Journal

Enter the title of the journal in this field, omitting 'The' if it occurs at the beginning of the title. Capitalise all significant words. Enter the journal title in full: no abbreviations are to be used for journal titles. Do not italicise the title as the output style will do this for you.

3.3.5 Volume

Enter the volume number in this field. If the journal does not have volume numbers, and is identified only by year, *enter the year here in square brackets* and leave the Year field blank.

3.3.6 Issue

AGLC3 requires an issue number only for journals where the pagination of each issue begins at page one. Where pagination is continuous across the issues of a volume, do not enter the issue number.

In some situations the issue details must be entered in the Date field, see 3.3.8 below.

3.3.7 Pages

AGLC3 requires that only the first page number be cited. However we recommend that you enter the complete pagination, if you have that information available, e.g.

123-156

The output style will cite the first page only.

3.3.8 Date

Use the Date field in two situations only:

- For journals where the pagination of each issue begins at page one, but there is no numerical designation of the issue. Enter the name of the season or month in the Date field.

- For journals where the pagination of each issue begins at page one, and there is no volume number, so a year has been entered in the Volume field in square brackets (see 3.3.5 above). In such instances, enter the designation for the issue (whether a number, a month or a season) in the Date field.

3.3.9 URL

Do not enter data in this field. If a journal article is readily accessible in printed form, it should be cited as a printed item, even if it was viewed on the web (AGLC3 4.9).

For journal articles that are accessible only on the web you should use the Electronic Article reference type (see 3.12 below).

3.4 Book

If the book is a collection of contributions published under editorial direction, use the Edited Book reference type (see 3.6 below).

The Book reference type can normally be used for parliamentary papers, parliamentary committee reports, Command papers and reports of royal commissions and law reform commissions. For such materials, the notes above on corporate authors (3.2.1) are particularly relevant.

3.4.1 Author

See 3.2.1 above.

3.4.2 Year

If the book is a multivolume set published over a range of years, enter the first and last years if the work is complete, e.g.

1970-93

If the publication is still in progress, enter the first year, followed by a hyphen, e.g.

1993-

When citing a later edition of a classic work, leave this field blank and enter the date of the edition being used in the Edition field. See 3.4.9 below.

3.4.3 Title


Capitalise the first word and all significant words. Do not italicise the title: the output style will do this for you.

3.4.4 Series Title

This field should be completed for Parliamentary Papers, Law Reform Commission reports and other publications where the series title and number are particularly important in identifying the work. Enter the title of the series and the number, e.g.

Report No 40
Parl Paper No 142
Cmnd 1749

3.4.5 Edition

Enter only the ordinal number; the output style will add “ed” afterwards. AGLC3 requires that you superscript the ordinal suffix. To do this, highlight the suffix, and then click on the Superscript button  on the toolbar at the top of the New Reference window. The field will now look like this:

2nd

If there is no edition number, you can insert other appropriate text, e.g.
revised

In the case of classic works, the date of the edition being used should be entered in this field, and the Year field should be left blank. The date of the first edition is inserted in the Original Publication field (see 3.4.9 below).

3.4.6 City

This data is not required by AGLC3. However if you have this information available, we recommend that you enter it in your reference, in case you later need to use the reference with a different bibliographic style. The output style will ignore this data.

3.4.7 Publisher

Use a brief version of the publisher's name (AGLC3 5.3.1). In the case of government publications, the publisher is often the same as the author; in such cases leave the Publisher field blank.

3.4.8 Volume

The output style is not configured to format data on specific volumes. We recommend that you store details of pinpoint references in the Notes field (see 3.2.3 above).

3.4.9 Original Publication

For classic works, enter the date of the original edition in this field. Then insert the date of the edition being used in the Edition field. Leave the Year field blank.

3.4.10 Translator

If the book is a translation, enter the name(s) of the translator(s) here. Enter the names in the same way as you would enter names in the Author field (see 3.2.1 above).

3.5 Book Section

3.5.1 Author

See 3.2.1 above.

3.5.2 Year

Enter the year of publication in this field.

3.5.3 Title

Enter the title of the chapter or section. Capitalise the first word and all significant words. Do not enclose the title in quotation marks: the output style will do this for you.

3.5.4 Editor

Enter editor names in the same way as author names (see 3.2.1 above). Do not add any abbreviations like "(ed)" after the names. The output style will supply these.

3.5.5 Book Title

Capitalise the first word and all significant words. Do not italicise the title: the output style will do this for you.

3.5.6 City

This data is not required by AGLC3. However if you have this information available, we recommend that you enter it in your reference, in case you later need to use the reference with a different bibliographic style. The output style will ignore this data.

3.5.6 Publisher

Use a brief version of the publisher's name (AGLC3 5.3.1).

3.5.8 Volume

If the section is from a multi-volume work, enter the volume number here. Do not enter the abbreviation "vol" as the output style will supply this for you.

3.5.8 Pages

AGLC3 requires that only the first page number be cited. However we recommend that you enter the complete pagination, if you have that information available, e.g.

123-156

The output style will cite the first page only.

3.5.9 Series Title

If this field is applicable, follow the instructions in 3.4.4 above.

3.5.8 Edition

If this field is applicable, follow the instructions in 3.4.5 above.

3.6 Edited Book

Follow the instructions for the Book reference type (see 3.4 above), but note the following point.

3.6.1 Editor

Enter editor names in the same way as author names (see 3.2.1 above). Do not add any abbreviations like "(ed)" after the names. The output style will supply these.

3.7 Newspaper Article

3.7.1 Reporter

Enter reporter names in the same way as author names (see 3.2.1 above).

If the article is an editorial, enter the word Editorial in the Reporter field. (Note: If you subsequently use the reference with another bibliographic style, you may need to move the word 'Editorial' into the Title field.)

3.7.2 Year

Enter the year of publication in this field.

3.7.3 Title

Enter the title of the article. Capitalise the first word and all significant words. Do not enclose the title in inverted commas: the output style will do this for you.

3.7.4 Newspaper

Enter the full title of the newspaper, including the word 'The' where it appears in the masthead. Capitalise the first word and all significant words. Do not italicise the title: the output style will do this for you.

If the article appears in a separately paginated section of the newspaper, and the section has its own title, the title of the section should precede the title of the newspaper (AGLC3 6.5.1), e.g.

Saturday Extra, The Age

3.7.5 City

If the city is outside Australia, add the country, e.g.

Toronto, Canada

If you viewed the article online, do not enter a city name in this field. Instead, insert:
online

3.7.6 Pages

Enter the page number, or section and page number, e.g. B6

3.7.7 Issue Date

Enter the day and month, e.g. 5 February

3.7.8 URL

If you viewed the article online, enter the URL in this field.

3.8 Conference Proceedings

Use this reference type only for *unpublished* conference papers. A published volume of conference proceedings should be entered as an Edited Book. A single paper in such a volume should be entered as a Book Section.

3.8.1 Author

See 3.2.1 above.

3.8.2 Year of Conference

Enter the year in which the conference was held. The day and month should be entered in the Date field (see 3.8.8 below).

3.8.3 Title

Enter the title of the conference paper. Capitalise the first word and all significant words. Do not enclose the title in inverted commas: the output style will do this for you.

3.8.4 Editor

This field is not applicable. If the paper was published in an edited volume of proceedings, use the Book Section reference type.

3.8.5 Conference Name

Enter the full name of the conference. Capitalise the first word and all significant words. Omit "The" at the beginning of the name: the output style will supply this.

3.8.6 Conference Location

Enter the place name, e.g. Sydney

3.8.7 Pages

This field is not applicable. Enter a published conference paper as a Book Section or a Journal Article, as appropriate.

3.8.8 Date

Enter the day and month (if known), e.g. 11-12 April

3.8.9 URL

If you accessed the paper online, enter the URL in this field.

3.9 Thesis

3.9.1 Author

See 3.2.1 above.

3.9.2 Year

Enter the year in which the degree was awarded.

3.9.3 Title

Capitalise the first word and all significant words. Do not italicise the title: the output style will do this for you.

3.9.4 Academic Department and City

These fields are not required by AGLC3.

3.9.5 University

Enter the name of the university in full, e.g. Oxford University

3.9.6 Thesis Type

Enter only the standard abbreviation for the degree, without stops, e.g. PhD

The output style will supply the word 'Thesis' following the abbreviation.

3.9.7 URL

If you accessed the thesis online, enter the URL in this field.

3.10 Report

Use this reference type for Working Papers (AGLC3 6.9).

3.10.1 Author

See 3.2.1 above.

3.10.2 Year

Enter the year of publication in this field.

3.10.3 Title

Capitalise the first word and all significant words. Do not enclose the title in quotation marks: the output style will do this for you.

3.10.4 Institution

Enter the full name of the Institution issuing the working paper. See the notes on entering names of corporate bodies in 3.2.1 above.

3.10.5 Date

If appropriate, enter the month, or day and month, in this field, e.g. 15 May

3.10.6 Report Number

Enter the series title and number of the working paper, e.g.
Working Paper No 112

3.10.7 URL

If you accessed the report online, enter the URL in this field.

3.11 Web Page

Note that if an item exists in printed form, it should be cited as a printed item using the appropriate reference type, even if it was viewed on the web (AGLC3 6.15).

For journal articles that are accessible only on the web you should use the Electronic Article reference type (see 3.12 below). For online versions of newspaper articles, conference proceedings, reports and theses, use those reference types.

3.11.1 Author

See 3.2.1 above.

3.11.2 Year

The output style will ignore any data entered in this field. See 3.11.5 below.

3.11.3 Title

Capitalise the first word and all significant words. Do not italicise the title: the output style will do this for you.

3.11.4 Publisher

If the page being cited is part of a larger website, enter the name of the website here. Often this will be the name of the organisation responsible for the website, but it may be a title, or both an organisation and a title. If the data in this field would be identical with the data in the Author field, leave this field blank (AGLC3 6.15.4).

3.11.5 Last Update Date

If the webpage gives a date of last update, or failing that, a date (or year) of creation, enter the information here, e.g. 29 September 1995 or May 2009 or 2010.

This information may be difficult to ascertain. Look for a copyright date, often to be found at the bottom of the web page. If no date can be ascertained, or if the page is being continually updated, leave this field blank.

3.11.6 URL

Enter the URL of the web page. Do not enclose it in angle brackets: the output style will do this for you. Note that AGLC3 does not require that you cite a date of retrieval (AGLC3 6.15.6).

Where the full URL is very lengthy and the document may be easily located from a homepage or index page of the website, it is sufficient to enter the URL of the homepage or index page (AGLC3 6.15.6).

3.12 Electronic Article

Use this reference type for journal articles which are available *only on the web*. If a journal article is readily accessible in printed form, it should be cited as a printed item, even if it was viewed on the web (AGLC3 4.9).


3.12.1 Author

See 3.2.1 above.

3.12.2 Year

Enter the year in which the article was first published.

3.12.3 Title

Enter the title of the article in this field. Capitalise the first word and all other significant words. Do not enclose the title in quotation marks: the output style will do this for you. If the name of a case or statute is included as part of the title, you must *italicise the case or statute name* when entering the title. Highlight the case or statute name and click on the Italics button  on the toolbar at the top of the New Reference window. (Alternatively, use the standard shortcut **Ctrl+I** to italicise text.)

3.12.4 Periodical Title

Enter the title of the journal in this field, omitting 'The' if it occurs at the beginning of the title. Capitalise all significant words. Enter the journal title in full: no abbreviations are to be used for journal titles. Do not italicise the title as the output style will do this for you.

3.12.5 Volume

Enter the volume number (if any).

3.12.6 Issue

Enter the issue number (if any).

3.12.7 Pages

Journals which are available only on the web do not usually have any continuous pagination. If such data is available, enter the complete pagination, e.g.

123-156

The output style will cite the first page only.

3.12.8 URL

Enter the URL here. Do not enclose it in angle brackets: the output style will do that for you. Note that AGLC3 does not require that you cite a date of retrieval (AGLC3 4.9).



3.13 Legal

The Legal reference type, which you have set up as a custom reference type (see 2.2 above), is to be used for Cases, Legislation, Treaties and all other references which do not fit into one of the reference types listed above.

3.13.1 Year

This field is optional. The output style will not use it when formatting your references. However you may find it useful when searching your library or sorting your references.

3.13.2 AGLC Citation

Enter the complete citation in the form specified by AGLC3. Capitals, italics and superscript *must* be supplied. For italics, highlight the relevant text and click on the Italics button  on the toolbar at the top of the New Reference window. For superscript, highlight the relevant text and click on the Superscript button  on the toolbar.

Do not insert a full stop at the end of the citation. You will supply the full stop and any relevant pinpoint citation when you insert the reference in your document (see 4.3 below).

3.13.3 Jurisdiction

This field is optional. However you may find it useful when searching your library or sorting your references. You can use the full name of the jurisdiction or a standard abbreviation. The output style will not use this data when formatting your references.

3.13.4 Abbreviated and Popular Names

In repeat citations, it is common to use abbreviated or popular forms of case names (AGLC3 2.1.14), legislation (AGLC3 3.9.1) and treaties (AGLC3 7.6).

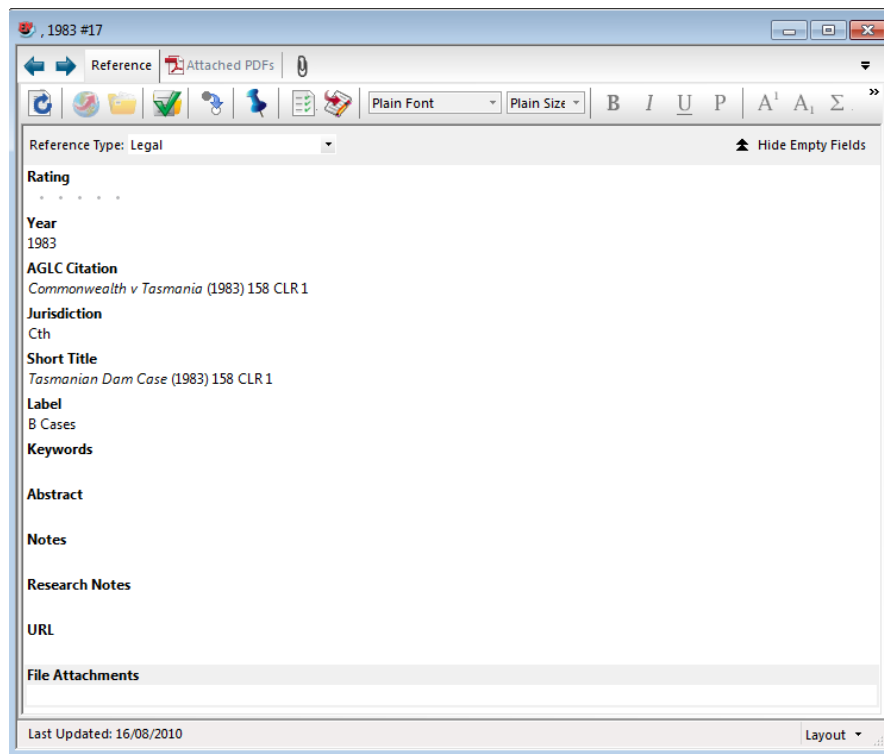
In such instances, insert the abbreviated or popular form in the **Short Title** field of the reference. Capitals, italics and superscript *must* be supplied. The Short Title must include full details, including (where appropriate) volume number, pages, report series.

When you cite the case, piece of legislation or treaty for the first time, EndNote will insert the reference with the full name. After inserting the citation and pinpoint citation (see 4.2 and 4.3 below) into the footnote, type the abbreviated name, italicised, in parentheses and single quotation marks, as specified in AGLC 2.1.14.

When you insert the citation in a later (but not immediately consecutive) footnote, EndNote will use the contents of the Short Title field.

3.13.5 Example

A completed reference for a case would look something like this:



Sample Reference using Legal Reference Type

3.14 Other Reference Types

The output style is not configured to format any other EndNote reference types. Do not use EndNote's Hearing, Bill, Statute, Case and Legal Rule/Regulation reference types. If you insert into your paper a reference with a reference type other than those listed in 3.3-3.13 above, the output style will insert the author's name in the footnote or bibliography, followed by a note: *Reference type not supported by output style*.

If you have downloaded the RefTypeTable XML file (see 2.3 above), all other EndNote reference types (except Generic) will be hidden, so there is no possibility of using reference types which are not supported by the output style.

Any reference which does not fall into one of the specific types listed in 3.3-3.12 above should be entered using the Legal reference type. Follow the instructions given in 3.13 above. In the AGLC Citation field enter the citation exactly as it should be cited according to AGLC3.

4. INSERTING REFERENCES INTO YOUR PAPER

We now look at some practical issues that arise when you use EndNote in conjunction with your word-processor. These instructions apply to Microsoft **Word 2010** for Windows.

4.1 The Word Ribbon

In Word 2010, the EndNote tools are located on an **EndNote ...** tab on the ribbon at the top of the screen.

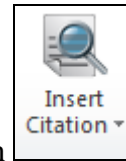
The commands used for inserting footnotes are located on a **References** tab on the ribbon.

You may find it helpful to add the **Insert Footnote** command to the **Quick Access Toolbar** at the very top of the screen. To do this, right click on the References tab and select **Customize Quick Access Toolbar**. In the box labelled **Choose commands from**, use the drop-down menu to select **References Tab**. In the list of commands, select **Insert Footnote** and click on the **Add** button to add it to the Quick Access Toolbar. Click on the **OK** button to close the dialogue box. You can now access the Insert Footnote command from the Quick Access Toolbar without leaving the EndNote tab.

4.2 Inserting References in Footnotes


Follow the instructions in AGLC3 on the position of footnote numbers (AGLC3 1.1.2). Position your cursor at the appropriate place in the Word document and use the **Insert Footnote** command.

Word will create the footnote at the bottom of the screen. If you wish to insert some text before the reference, type it first, and then make a space.



To insert the reference, you can use the **Insert Citation** button on the EndNote tab in Word to search your EndNote library and insert the reference.

Alternatively, you can go to EndNote and display your complete EndNote library and

highlight the reference which you wish to cite. Use the **Insert Citation**  button on the toolbar at the top of the library window to insert the citation in your Word document.

If you wish to add a pinpoint citation at the end of your reference, see the notes in 4.3 below on pinpoint citations.

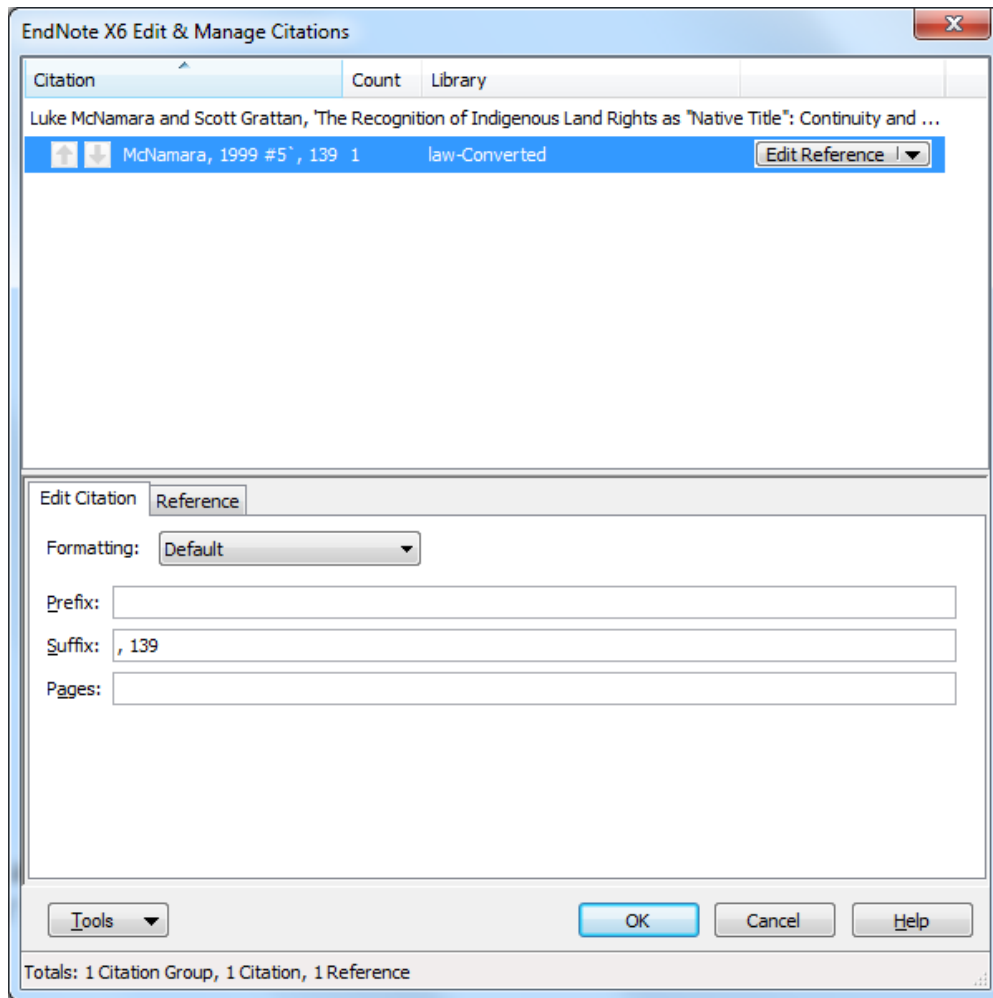
If you wish to cite a second reference in the same footnote, type a semicolon and a space before inserting the second reference.

At the end of each footnote, type a full stop.

4.3 Pinpoint Citations

After EndNote has inserted the reference into the footnote, you can edit the citation to add a pinpoint citation to specific pages, paragraphs or sections. Right-click on the reference in the footnote and select the **Edit Citation(s)>More** command.

When the Edit Citation(s) window opens, find the **Suffix** box. (Do **not** use the Pages box: the output style is not configured to format data entered in the Pages box.) Enter the required data in the **Suffix** box, including a **preceding space**. Remember that AGLC3 sometimes requires a **comma** before the pinpoint citation, e.g. for journal articles, Australian cases, UK legislation.



Inserting a Pinpoint Reference for a Journal Article

For certain citations (e.g. US cases and legislation, international treaties, UN documents) pinpoints are inserted *within* the reference. In these cases, do *not* use EndNote to insert the citation. Instead, open the reference in your EndNote library and highlight the contents of the AGLC Citation field. Copy (**Ctrl+C**) this field and paste (**Ctrl+V**) it into your footnote. The pasted text will retain the EndNote font and will have to be amended to match the font of your document. Now type the pinpoint citation within the reference, as specified in AGLC3.

If you are writing a longer work and require a bibliography at the end of your document, bear in mind that EndNote will only include in the bibliography those references which you have inserted using EndNote. To include references which you have typed yourself or inserted with copy and paste, see 5.2.2 below.

4.4 Omitting Part of a Citation

If you quote the name of a case in the text of your document, the case name should not be repeated in the footnote (AGLC3 2.1.15). The footnote should only contain the details of where the case report is published, plus any pinpoint citation.

Similarly, if a piece of legislation is mentioned by name in the text, there is no need to cite it in a footnote unless further details are required to locate it, or unless a pinpoint citation is required.

If the footnote is to contain only part of a citation, just type the required details in the footnote, and do not insert the reference using EndNote. You may find it convenient to copy and paste some of the details from the AGLC Citation field of the reference in your EndNote library. If you want EndNote to format a separate bibliography at the end of your document, be aware that this reference will not appear in the bibliography if you have not used EndNote to insert the reference somewhere else in your document. To include in the bibliography references which you have typed yourself or inserted with copy and paste, see 5.2.2 below.

4.5 Repeat Citations

4.5.1 Repeat Citation in Immediately Following Footnote (All Reference Types)

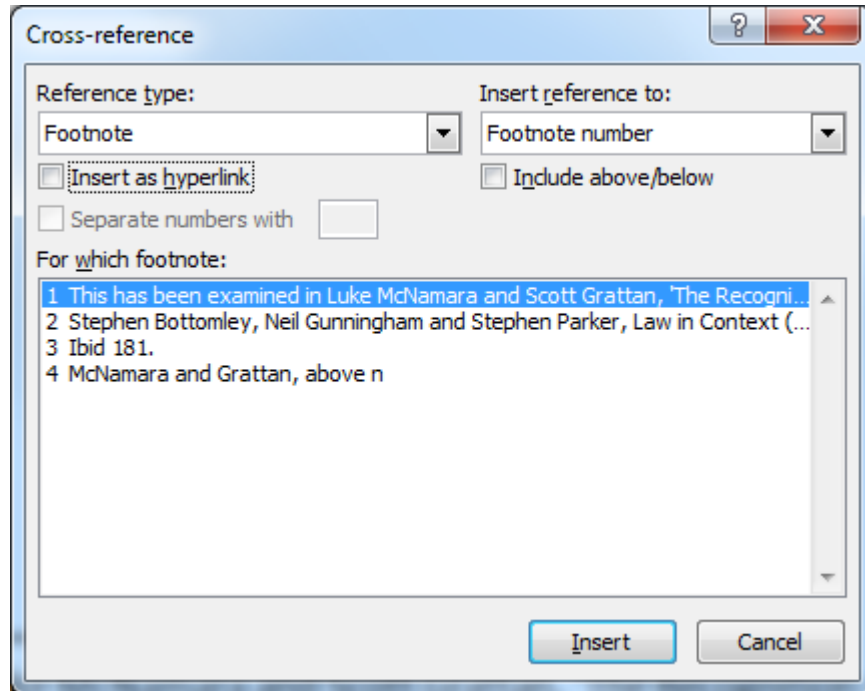
When you cite a work that has already been cited in the *previous footnote*, EndNote will insert the text 'Ibid' (or 'ibid' if there is preceding text in the footnote). If necessary you can then edit this citation to add a pinpoint reference, see 4.3 above.

4.5.2 Repeat Citation in a Later (but not Immediately Following) Footnote: Book, Article, etc.

If you insert a reference to a book, article, etc. (but not a case, a treaty or a piece of legislation) which has been previously cited in the document, it will appear in the form “Smith, above n ”

You then need to insert the number of the footnote in which the reference was previously cited. To do this, use Microsoft Word's **cross-reference** function: click on the **Insert** tab on the ribbon, and select **Cross-Reference**.

You will now see the Cross-reference dialogue box. Under **Reference type** select **Footnote**, and under **Insert reference to** select **Footnote number**. You will see a list of footnotes, and you can highlight the appropriate footnote:



The Cross-reference Dialogue Box in Microsoft Word

Now click on the **Insert** button to insert the cross-reference. **Close** the dialogue box and return to the footnote. If required, type the details of the pinpoint citation at the end of the footnote.

The advantage of using Word's cross-reference function is that you can easily *update the cross-references* if your footnote numbers change. When you revise your document, you may add or delete footnotes, causing the footnotes to be renumbered. To update your cross-references to reflect the new numbering, click anywhere in the footnotes and press **Ctrl+A** to select all the footnotes. Now press the **F9** key, and all of the cross-references will be updated.

You should also use this procedure when the reference was cited in the immediately preceding footnote, if other references were also cited in that footnote.

A complication arises where **multiple works by the same author** are cited in your document, or where **different authors with the same surname** are cited. When this happens, you are required to add additional information to the repeat citations (see AGLC3 1.4.2). In these cases, do not use EndNote to insert the repeat citations. Type the abbreviated details in the form specified in AGLC3 1.4.2, e.g.

¹⁴ Dixon, *Jesting Pilate*, above n

Then use Word's cross-reference function, as explained above, to add the number of the relevant footnote. Finally type the pinpoint citation.

4.5.3 Repeat Citation in a Later (but not Immediately Following) Footnote: Case, Legislation or Treaty

Repeat citations for a *case, piece of legislation or treaty* are treated differently. If the reference is cited in a later footnote (but not the footnote immediately following), EndNote will insert the full citation again.

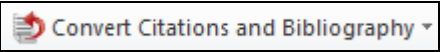
However if you are using an *abbreviated or popular name* for repeat citations to the case, piece of legislation or treaty, see 3.13.4 above for information on using the **Short Title** field in the EndNote reference. If the reference in the EndNote library contains a Short Title, this citation will be used. If the reference does not contain a Short Title, EndNote will insert the normal citation.

If the repeat citation names the case or treaty in the text, the name should be omitted from the footnote (see 4.4 above).

4.6 Removing the Field Codes

When you have finished writing your document, and have used EndNote to format the references, the final step is to remove the field codes which link the document to EndNote. These field codes can interfere with the software used by publishers.

Go to the **Convert Citations and Bibliography** command

 on the EndNote tab, and click on the arrow to select **Convert to Plain Text**. You will see a warning message, explaining that this will preserve your original document (with EndNote field codes) and create a new, unsaved document (without EndNote field codes). Click on the **OK** button to continue.

Save the new document under a name different from that of your original document. The *original document must be retained*, as it is your master copy. Any changes which require the insertion, amendment or deletion of references should be made in the master copy. You will then have to use the Convert Citations and Bibliography command again to generate a new unlinked document.

5. WORKING WITH LONG DOCUMENTS

If you are writing a longer work (e.g. a thesis or book), you will probably require a bibliography at the end of the work, in addition to the footnotes on each page. AGLC3 gives instructions for the format of such bibliographies (AGLC3 1.16).

5.1 Categorising the References

AGLC3 requires that your bibliography be divided according to the type of material. To do this, you must enter a category in the **Label** field of each of your references. The output style will sort your bibliography by the Label field, so that the references will be grouped in categories. Then references are sorted by the first author, or, if there is no author, by title.

In the Label field of each reference, enter one of the categories specified in AGLC3:

- A Articles/Books/Reports
- B Cases
- C Legislation
- D Treaties
- E Other

If you are adding the category as you enter each reference, we suggest that you set up a *term list* linked to the Label field. Store the list of categories in the term list. When you are entering a reference and reach the Label field, press **Ctrl+1** to open the term list. Double click on the appropriate category from the term list and EndNote will insert it in the Label field. For more information on working with term lists, see the **Help** function in EndNote.

Alternatively, you can add the category to the Label field of multiple references simultaneously by using EndNote's Change Field command. Open the library and highlight all references which belong to a particular category. Then click on **References** on the menu bar and click **Show Selected References** to display only those references. Now click on **Tools** on the menu bar and click **Change/Move/Copy Fields**. When the dialog box opens, make sure that the **Change Fields** tab is selected. Use the drop-down menu to select the **Label** field. Click the radio button for **Replace Whole Field With**, and type the required text in the box, e.g. B Cases, and then click on the **OK** button.

When you use the *Footnotes plus Bibliography* version of the output style to generate the bibliography, the references will appear as a single block, grouped according to the categories. After removing the EndNote field codes (see 4.6 above), insert some blank lines between each category and add an appropriate heading to each group.

5.2 Structuring Long Documents

Long documents can present problems for both Word and EndNote. We will look at two possible ways of structuring long documents.

5.2.1 Each Chapter as a Separate Document

Keep each chapter as a separate Word document. This procedure is somewhat cumbersome, but because the individual documents are not very large, you should avoid the problems which can occur with long documents.

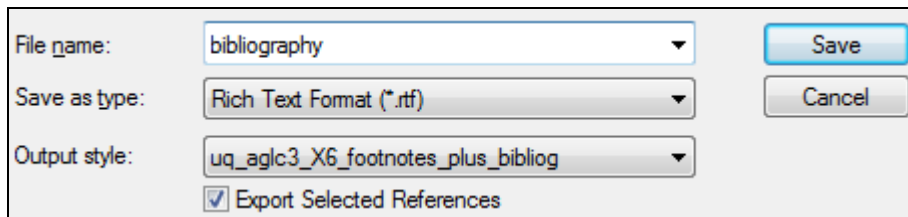
Use the *Footnotes Only* version of the output style to format the references in each chapter.

Now create the bibliography as a separate Word document. Open your EndNote library. If the library contains only references which you wish to include in the bibliography, just press **Ctrl+A** to select all the references.

Alternatively, you may wish to include only selected references in your bibliography:

- If you have inserted some code into the required references while you were writing your paper (for example, XXX in the Notes field), you can **Search** for all references which contain that code. Then press **Ctrl+A** to select those references.
- If you have not coded the references, create a **Group** with an appropriate name. Then go through the library, adding the required references to that group. When you have finished, display the references in the group. Click on the first reference in the group and press **Ctrl+A** to select the whole group.

Click on **File** then **Export**, and a dialog box will open. Specify where you want to save the bibliography and give the file a name. In the **Save as Type** box, you must select **Rich Text Format**. In the **Output style** box, select the *Footnotes plus Bibliography* version of the output style:



The screenshot shows a dialog box with the following fields and options:

- File name:** A text box containing "bibliography".
- Save as type:** A dropdown menu showing "Rich Text Format (*.rtf)".
- Output style:** A dropdown menu showing "uq_aglc3_X6_footnotes_plus_bibliog".
- Export Selected References**
- Save** button (highlighted in blue)
- Cancel** button

EndNote will format the bibliography and save it as the file which you have designated. Open this file in Word. The references should be grouped according to the categories which you inserted in the Label field (see 5.1 above). This document is not linked to EndNote and contains no field codes, so you can now change the font, separate out the categories and add an appropriate heading to each group.

5.2.2 One Large Document Divided Into Chapters

Create one large Word document.

At the beginning of each chapter, insert a *section break* so that each chapter is a separate section. When you insert your first footnote in a new chapter, display the footnote options and check the option **Restart Each Section**. Word will now begin numbering the footnotes at 1 in the new chapter.

Use the *Footnotes Only* version of the output style to format the references. This may seem illogical, but the *Footnotes Only* version will ensure that any cross-references to

previous citations of a reference will only be made if the previous citation occurred *within the same chapter*.

If you want a bibliography at the end of your document:

When you have finished writing your document, you can generate a bibliography for the whole document using the following procedure.

First, make a *copy* of your document.

Reformat the *copy* of your document using the *Footnotes Plus Bibliography* version of the output style.

You may want your bibliography to *include some references which you have not directly cited* in your document, or references which you have typed in yourself or copied-and-pasted from the reference in the library, without using EndNote to insert the reference in the footnote. (It may be helpful to create a Group in your EndNote library to keep track of such references as you are writing your document.) To make these references appear in the bibliography, proceed as follows, *still using the copy* of the original document:

- Insert a page break at the end of the copy of your document.
- On this new page, insert all the relevant references, one after another.
- The references will not be visible on the page, because they have not been inserted into footnotes, but they will be added to the bibliography at the end of the document.

Remove the field codes from the copy of your document (see 4.6 above). This will create a further copy of the document, which is unlinked from EndNote.

Copy the bibliography from the version of the document which is now unlinked from EndNote.

Return to the *original* document. Insert a *page break* at the end and *paste* the copy of the bibliography at the end of the document. This bibliography has no EndNote field codes and can be edited as required (see 5.1 above).