



**USING THE
AUSTRALIAN GUIDE TO LEGAL CITATION (2nd edition)
WITH
ENDNOTE 9**

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Are you upgrading from EndNote 7 (or an earlier version of EndNote)?

Those who have used earlier versions of this guide, and the associated output styles, should experience no problems when upgrading from EndNote 7 (or an earlier version). When EndNote 9 is installed, it should preserve your preferences, so the **Legal** reference type should still be available. When you open your library for the first time, you will be prompted to *convert* it into EndNote 9 format.

You can continue to use the output style which you were using before, or you can download a new version (see 1.3 below). The only difference in the new version of the output style is that it is configured to format the **Electronic Article** reference type, which can be used for journal articles which are only available on the web (see 3.12 below).

1. INTRODUCTION

1.1 About this Guide

This guide aims to teach you practical techniques for using the *Australian Guide to Legal Citation* (2nd edition) with version 9 of 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, work through the **EndNote Guided Tour** in Chapter 3 of the EndNote manual. The manual forms part of the software and will be installed on your computer when you install EndNote. It is a large .pdf file. The default location is: **C:\Program Files\EndNote 9\EndNote.pdf**

We also assume that you are familiar with the requirements of the second edition (2002) of the *Australian Guide to Legal Citation*. It can be viewed on the web at: **http://mulr.law.unimelb.edu.au/PDFs/aglc_dl.pdf**

This guide is written for users of EndNote 9. Users of EndNote 8 will also find it useful. It explains how to use EndNote 9 with Microsoft Word (Word 2000 and above).

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:

"AGLC2" – *Australian Guide to Legal Citation*, 2nd edition (Melbourne: Melbourne University Law Review Association, 2002)

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

"the EndNote manual" – the manual for the EndNote software (see 1.1 above).

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/endnote/styles.html>

Note that there are two versions of the style:

- **Footnotes Only** Use this version for writing short documents, e.g. journal articles
- **Footnotes plus Bibliography** Use this version for writing longer works which require a bibliography at the end, e.g. theses and books.

Follow the instructions on the webpage to download one or both versions of the style. **Macintosh** users should read the note on the webpage about making compatible copies of the styles.

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 AGLC2 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.

1.4 Displaying the EndNote Toolbars

We recommend that you use the EndNote toolbars, which give you faster access to common functions. In this guide, we shall be referring to these toolbars.

To display the toolbars in EndNote, click on **Tools** on the menu bar. Then click on **Show Toolbar** and check all three toolbars.

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 AGLC2 (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.

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.

In EndNote 8 and later versions of EndNote, the reference types are controlled by an XML file called **RefTypeTable** which is stored in the user's Application Data folder. If more than one person is using EndNote on the same computer, each user can have separate settings for reference types.

2.3.1 Instructions for those using Windows

Windows users must save the file in their EndNote Application Data folder. This is a *hidden folder*. To display all the hidden folders on your computer, first go to **Windows Explorer** by doing a right click on the Windows **Start** button and selecting **Explore**. In Windows Explorer, click on the **Tools** option on the top menu bar, and select **Folder**

Options. When the dialog box opens, click on the **View** tab. In the **Advanced Settings** box, check the option **Show hidden files and folders**. Then click on the **OK** button.

The RefTypeTable file to be used with this guide can be displayed on the web at:
<http://www.library.uq.edu.au/endnote/aglc2/RefTypeTable.xml>

Use the **File>Save As** command to save it to your computer. You must save it in the following folder:

C:\Documents and Settings\[your user name]\Application Data\EndNote

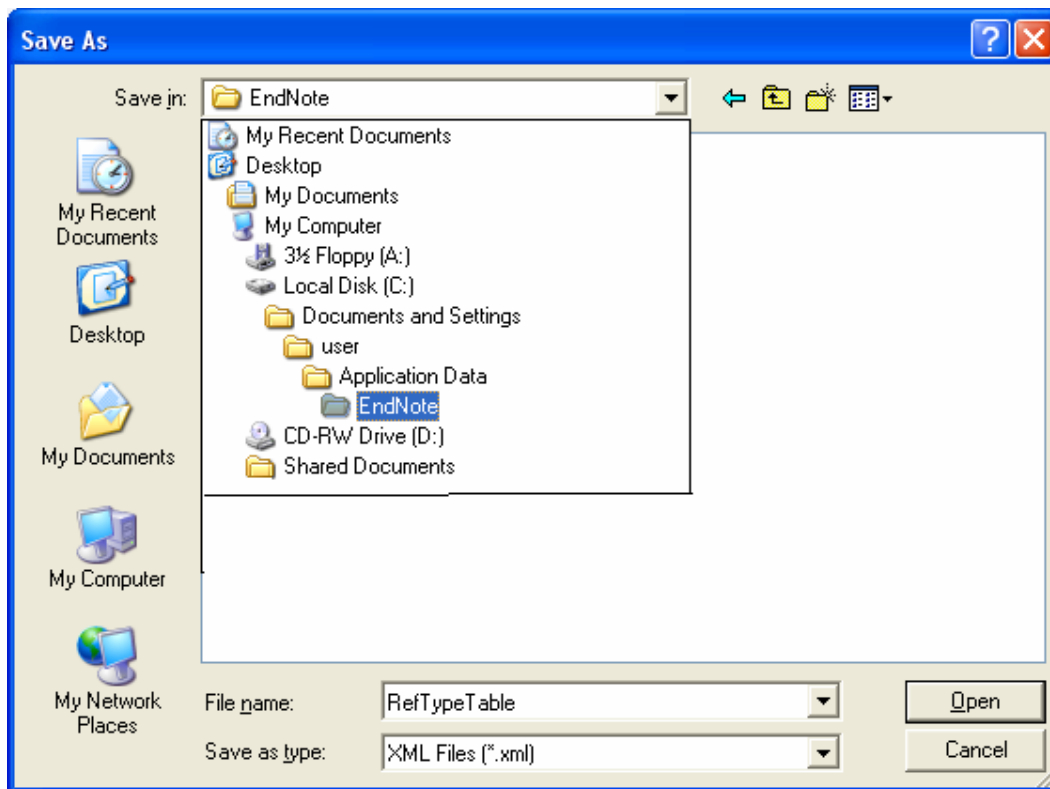


Figure 1: Saving the RefTypeTable File

You will be asked to confirm that you wish to replace the existing RefTypeTable file.

The next time that you start EndNote, these changes will become effective.

2.3.2 Instructions for those using a Macintosh

The RefTypeTable file to be used with this guide can be displayed on the web at:
<http://www.library.uq.edu.au/endnote/aglc2/RefTypeTable.xml>

Save it to your computer. You must save it in the following location:
user/library/application support/EndNote

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 Label field and type **Label**.

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

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 **Figure 2**.

| | |
|-----------------------------------|----------------|
| 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 | |
| Alternate Title | |
| ISBN/ISSN | |
| Electronic Resource Number | |
| Original Publication | |
| Reprint Edition | |
| Reviewed Item | |
| Custom 1 | |
| Custom 2 | |
| Custom 3 | |
| Custom 4 | |
| Custom 5 | |
| Custom 6 | |
| Custom 7 | |
| Accession Number | |
| Call Number | |
| Label | Label |
| Keywords | Keywords |
| Abstract | Abstract |
| Notes | Notes |
| Research Notes | Research Notes |

| | |
|--------------------|-----|
| URL | URL |
| Link to PDF | |
| Author Address | |
| Image | |
| Caption | |
| Access Date | |
| Last Modified Date | |
| Translated Author | |
| Translated Title | |
| Name of Database | |
| Database Provider | |
| Language | |

Figure 2: Legal Reference Type

Once you have entered the fields shown above, you can enter additional fields for your own use, if you so wish. 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. Firstly we give instructions which are applicable to all types of references, and then we give 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 (AGLC2, 1.13.1-1.13.2) 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 (e.g. AGPS), 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. Example:

Law Reform Committee,, Parliament of Victoria

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 4.5 below).

3.3 Journal Article

For journal articles which are only available 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 Text Style toolbar. (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

AGLC2 only requires an issue number 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.

3.3.7 Pages

AGLC2 only requires that 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 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 (AGLC2 6.14.1).

For journal articles that are only accessible 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-

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. AGLC2 requires that you superscript the ordinal suffix. To do this, highlight the suffix, and then click on

the Superscript button  on the Text Style toolbar. The field will now look like this:
2nd

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

3.4.6 City and Publisher

This data is not required by AGLC2. 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 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).

3.5 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 and Publisher

This data is not required by AGLC2. 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.

3.5.7 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

AGLC2 only requires that 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 (AGLC2 6.2.1), e.g.

Saturday Extra, The Age

3.7.5 City

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

Toronto, Canada

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

3.8 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.

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

3.9 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 AGLC2.

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.

3.10 Report

Use this reference type for Working Papers (AGLC2 6.8).

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.

3.10.5 Report Number

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

3.11 Electronic Source

This reference type can be used for web pages. Note that if an item is readily accessible in printed form, it should be cited as a printed item using the appropriate reference type, even if it was viewed on the web (AGLC2 6.14.1).

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

3.11.1 Author

See 3.2.1 above.

3.11.2 Year

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

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 (AGLC2 6.14.5).

3.11.5 Access Year

Enter the year in which you viewed the reference, e.g. 2001

3.11.6 Access Date

Enter the day and month on which you viewed the reference, e.g. 18 August

3.11.7 URL

Enter the URL of the web page. Do not enclose it in angle brackets: the output style will do this for you.

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 (AGLC2 6.14.7).

3.12 Electronic Article

Use this reference type for journal articles which are only available 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 (AGLC2 6.14.1).


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 Text Style toolbar. (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 only available 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 Date Accessed

Enter the date on which the article was retrieved, in the form:
29 November 2001

3.12.9 URL

Enter the URL here. Do not enclose it in angle brackets: the output style will do that for you.



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 AGLC2. Capitals, italics and superscript must be supplied. For italics, highlight the relevant text and click on the Italics button  on the Text Style toolbar. For superscript, highlight the relevant text and click on the Superscript button  on the Text Style 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: a Note

In repeat citations, it is common to use abbreviated or popular forms of case names (AGLC2 2.1.8-2.1.9) and treaties (AGLC2 7.1.7).

In such cases, set up two separate references in your library. In the first reference, give the full name of the case or treaty. In the second reference, give the abbreviated or

popular name only. In the Notes field of each reference, make a note to remind yourself that you have another version of this reference in your library.

When you cite the case or treaty for the first time, use the reference with the full name. After inserting the citation (see 4.3 below), type any pinpoint citation, and then type the abbreviated name, italicised, in parentheses and single quotation marks. In subsequent citations, use the reference with the short form of the name.

If you are writing a longer work and require a bibliography at the end of your document (see 5 below), bear in mind that both references (the full form and the abbreviated form) will appear in the bibliography. When doing the final editing, turn the abbreviated citation into a cross-reference to the full citation.

3.13.5 Example

A completed reference for a case would look something like **Figure 3**:

| |
|---|
| <p>Year: 1983</p> <p>AGLC Citation: <i>Lojuk v Quandt</i>, 706 F2d 1456 (7th Cir, 1983)</p> <p>Jurisdiction: United States</p> <p>Label: 2. Case Law</p> <p>Keywords:</p> <p>Abstract:</p> <p>Notes:</p> <p>URL:</p> |
|---|

Figure 3: 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*.

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 AGLC2.

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 recent versions of Microsoft Word for Windows.


4.1 The EndNote Toolbar


When working with EndNote in Word, we recommend that you use the EndNote toolbar. To display the toolbar, click on **View** in the Word menu bar, then click on **Toolbars**, and select **EndNote ...**

The buttons on the toolbar will be unfamiliar at first. Sit your mouse on each of the buttons, and a text box will appear explaining the use of that button. You can also access these commands by clicking on **Tools** in the Word menu bar, and then clicking on **EndNote ...** to display the EndNote submenu. However the toolbar gives you faster access to the EndNote functions.

4.2 Disable Instant Formatting

We strongly recommend that you turn off the EndNote instant formatting option (also called Cite While You Write or CWYW for short). Many users have found that this function is unstable and makes Word freeze, resulting in loss of unsaved data.


On the toolbar, click on the button for **Cite While You Write Preferences** . When the dialog box opens, uncheck the option to **Enable Instant Formatting on New Word Documents**. Click the **OK** button to confirm this change.



Then click on the **Format Bibliography**  button on the toolbar. When the dialog box opens, click on the **Instant Formatting** tab. If the first button is labelled **Enable**, there is nothing to change, and you can click on the **OK** button. But if the first button is labelled **Disable**, click on it and it will change to **Enable**. Then click on the **OK** button.

4.3 Inserting References in Footnotes

Follow the instructions in AGLC2 on the position of footnote numbers (AGLC2 1.1.2). Position your cursor at the appropriate place in the Word document. Click on **Insert** on the menu bar in Word, and then select **Footnote** (or **Reference** then **Footnote**). When the dialog box opens, select the **Footnote** and **AutoNumber** options.

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 **Find Citation(s)**  button on the toolbar in Word to search your EndNote library and insert the reference.

Alternatively, you can use the **Go to EndNote**  button on the toolbar and display your complete EndNote library. Highlight the reference which you wish to cite, and then click on the Insert Citation button  on the toolbar in EndNote.

If you wish to add a pinpoint citation at the end of your reference, see the notes in 4.5 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 reference, type a full stop.

Figure 4 shows how a footnote might appear before the references are formatted.

³ See, eg, {Pearson, 1993 #23}.

Figure 4: Footnote before Formatting

4.4 Formatting the References

You can wait until you have finished writing your paper before you format the references, but we recommend that you format the references at short intervals while you are writing. This will allow you to check that the references are formatting correctly.


To format the references, click on the **Format Bibliography**  button on the toolbar. When the dialog box opens, your document should be listed in the **Format Document** box. For the option **With Output Style**, select the style for AGLC2 which you downloaded from the library's website (see 1.3 above). Click on the **OK** button to format the references.

Figure 5 shows how the footnote in Figure 4 will appear after the references are formatted.

³ See, eg, Noel Pearson, '204 Years of Invisible Title: From the Most Vehement Denial' in Margaret Stephenson and Suri Ratnapala (eds), *Mabo: A Judicial Revolution* (1993) 80.

Figure 5: Footnote after Formatting

4.5 Pinpoint Citations

After EndNote has inserted the reference into the footnote, you can add a pinpoint citation to specific pages or sections. Just type the details into the footnote after the reference and before the final full stop. Note that AGLC2 sometimes requires a comma before the pinpoint citation, e.g. for journal articles, Australian cases, UK legislation.

Figure 6 shows how the footnote in Figure 4 will appear after a pinpoint citation has been added and before the references have been formatted.

³ See, eg, {Pearson, 1993 #23}, 92.

Figure 6: Unformatted Footnote with Pinpoint Citation Added

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 for you. 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 AGLC2.

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 used EndNote to insert. To include references which you have typed yourself or inserted with copy and paste, see 5.2.2 below.

4.6 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 (AGLC2 2.1.10). The footnote will 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 in your EndNote reference. 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 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.

4.7 Repeat Citations

When citing a work that has already been cited in the *previous footnote*, do not use EndNote to insert the repeat citation. Type 'Ibid' or 'ibid' as specified in AGLC2 1.2.1.


When citing a source (other than a case, a treaty or a piece of legislation) that has been cited in an earlier footnote (but not the previous footnote), do not use EndNote to insert the repeat citation. Type the abbreviated details in the form specified in AGLC2 1.2.2.

Repeat citations for a *case* or *treaty* are treated differently. Use 'Ibid' or 'ibid' if the case or treaty is cited in the previous footnote, otherwise use EndNote to insert the full citation again, and add any pinpoint reference. If you are using an abbreviated or popular name for repeat citations to the case or treaty, see the note above (3.13.4) about creating two references for the case or treaty in your library. If the repeat citation names the case or treaty in the text, the name should be omitted from the footnote (see 4.6 above).

Legislation should be cited in full in all repeat citations (AGLC2 1.2.2). Use EndNote to insert the full citation again, and add any pinpoint reference. However if the repeat citation names the legislation in the text, the name should be omitted from the footnote (see 4.6 above).

4.8 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.

Open your document in Word. On the EndNote toolbar, click on the Remove Field Codes button . You will see a message explaining that this command creates a new, unsaved document. Click **OK** 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 Remove Field Codes 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. AGLC2 gives instructions for the format of such bibliographies (AGLC2 1.15).

5.1 Categorising the References

AGLC2 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 AGLC2:

1. Articles/Books/Reports
2. Case Law
3. Legislation
4. Treaties
5. Other Sources

Figure 3 (above) shows an example of this.

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 Chapter 9 of the EndNote manual.

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 **References** again and click **Change and Move 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. 2. Case Law, 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. When doing the final editing of your document, 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 four 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, hold down the **Ctrl** key and go through the library, highlighting the required references. Then click on **References** on the menu bar and click **Show Selected References**.

Once you have selected the references, click on the Sort Library button  on the toolbar. This will open a dialog box that allows you to select the fields on which to sort. In the first box, select **Label**. In the second box, select **First Author**. In the third box, select **Year**. Then click on the **Sort** button and EndNote will re-sort the references.

Use the Style Manager menu  on the toolbar to select the *Footnotes plus Bibliography* version of the output style.

Click on the Export button  on the toolbar 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**.

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

Create one large Word document. Bear in mind that both EndNote and Word can encounter problems with very large documents.

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 plus Bibliography* version of the output style to format the references. 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. To make these references appear in the bibliography, proceed as follows:

- Insert a page break at the end of your document. On this new page, insert all the relevant references, one after another. It is probably wiser to do this on a continuing basis as you are writing the document, but it can be done in one step once you have finished writing.
- In each of the temporary citations, delete the author name (if any) and the year, leaving only the reference number, e.g. {#17}

You are now ready to format the references and bibliography. Click on the Format Bibliography button on the toolbar. Before formatting, click on the **Layout** tab. In the **Bibliography Title** box, enter the heading that you would like to appear, e.g. Bibliography. Then format the bibliography.

5.2.3 Master Document and Subdocuments

Set up the chapters as subdocuments within a master document. Use the help screens in Word if you are not familiar with this function. Bear in mind that some experienced Word users regard the Master Document / Subdocument function as unstable and unreliable.

Use the *Footnotes plus Bibliography* version of the output style to format the references. 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. To make these references appear in the bibliography, follow the procedure outlined in 5.2.2 above.