

EndNote – Preparing a document for final submission

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Your EndNote Library

1. All citations are in the same library, by all means put them in separate groups.
(If they are in more than one library, then most features will still work, but ensure all libraries are open when using Word. If any references are duplicated across the Libraries, Endnote/Word will ensure that only one entry appears in the bibliography.)
2. Check you are using the correct style, eg Harvard to format your citations
3. If you personalise an EndNote style for yourself work on a copy of the style and take a backup of the file.

Your Word document

1. Keep copies of the Word documents at various key stages of your work.
2. Keep the backups of somewhere other than your PC (ie email them to your Sussex account or store on the N: drive on campus)
3. Create your documents and decide
 - a. Are you having just one bibliography at the end of the document or one at the end of each section.
 - b. If you are using sections, use a style which supports Sections, see EndNote website <http://www.endnote.com/support/enstyles.asp>

Combining Multiple Word documents & Bibliographies

There are a couple of ways to combine your Word documents but the way that most users are familiar with is probably cut and paste (although you can also use the Word Master Document option to combine). Below is an extract from a Thomson Reuters Technical Support response which covers how to combine the documents.

... you want to merge different documents to one and create a single bibliography at the end.

It is possible to merge different documents into one single document. EndNote does not allow duplicates in the bibliography and will exclude them when formatting the document. However, the citations in the text will be intact.

Also, if using multiple Libraries (which is not preferred) it is not necessary to merge your libraries in order to merge the documents, but all Libraries used in the Word documents must be open in EndNote. However, you can merge Libraries if you wish and EndNote can search for the reference in any opened EndNote library.

Here's how to merge your documents together: Please save a back up copy of your Word files before following these steps:

1. Open the copy of document into which you want to insert the other document. For clarity, we will refer to this as your "master" document.
2. From EndNote tab, Click on Convert Citations and Bibliography>Convert to Unformatted Citations.
3. Two things should happen
 - First, the in-text citations will revert to their "temporary" or "unformatted" form, which usually looks like {Smith, 1996 #42}
 - The second thing you will notice is that your reference list/bibliography will (temporarily) disappear.
4. Open the copy of the other document... your "source" document.
5. Unformat the document as described in step 2.
6. Press Ctrl-A on the keyboard to highlight the entire source document, and then Ctrl-C to copy.
7. Click over to your master document and place the cursor in the place you'd like to insert the source text. Ctrl-V to paste it.
8. Make any edits to the text you need to at this time (e.g. correct spacing and formatting, move sections of the text around, etc). When you are done with your edits, proceed to the next step. Repeat these steps for any other source documents you want to join to your master.
9. Open all the EndNote libraries (or the merged library) that contain all these references.
10. On the EndNote tab, in the Bibliography group, click the bottom corner arrow. Where it says With Output Style, please select the style you desire. Click the Instant Formatting tab and click Enable. Then click OK.

NOTE: If you get a window that says EndNote Select Matching Reference, please see the following FAQ page for further instruction:

<http://endnote.com/support/faqs/CWYW/faq17.asp>

When the matching and formatting process is complete, you will have a single document with one reference list at the end.

Please find the detailed steps to merge libraries in the EndNote X4 Help Documentation, Pg 25

You can access the online PDF version of the Manual from here:

<http://endnote.com/support/enx4help-terms.asp>

I hope this information helps. Let me know if you have any questions.

OR, EndNote also recommend in the EndNote help

Creating a Bibliography from Multiple Documents (Microsoft Word)

You can use Word's Master Document feature to generate a single bibliography from multiple documents. This allows you to create a cumulative bibliography from any number of book chapters. (As an alternative, we recommend using a single Word document split into Sections. See Creating Multiple Bibliographies in a Single Document.)

To generate a single bibliography:

1. In each of your documents, or chapters, insert your citations to link them to references in an EndNote library.
2. **Word 2003:** In each document, go to the *Tools* menu, then the *EndNote X3* submenu, and choose *Unformat Citations* to unformat all of the citations in the document.

Word 2007: On the EndNote tab, in the Bibliography group, click *Convert Citations and Bibliography* and choose *Convert to Unformatted Citations*.

3. *Close* all of your documents.
4. Create a *New* document.
5. Use the *Outline* view to designate the new document as a master document, then insert and display each of your chapters as subdocuments. (Check Word's documentation if you need step-by-step instructions.)

Note: If you have collapsed subdocuments to hide their content in Outline view, make sure you expand them in order to display the contents of all subdocuments before **continuing**.

6. **Word 2003:** From the *Tools* menu, go to the *EndNote X3* submenu and select *Format Bibliography*.

Word 2007: On the EndNote tab, in the Bibliography group, click the bottom corner arrow.

Note: Your documents must allow read/write access; they cannot be designated *Read-only* (locked).

7. Verify the formatting options and click *OK*.

EndNote creates the bibliography, using citations from the master document and all displayed subdocuments, and places it at the end of the master document. You can move the bibliography anywhere within the master or subdocuments, and it will remain in that location even when you reformat.

Note: If you choose Word's *Insert > File* command and select the "Link" option to insert a document into the text, EndNote will *not* format the linked document when you format the main document. The text from the linked document will be skipped.

If you want to format a bibliography for each subdocument plus a cumulative bibliography at the end of the master document, follow the instructions above, but use an output style that allows formatting of Sections. See the description about *Creating Multiple Bibliographies in a Single Document and Sections* for additional information. In the case of a master document, subdocuments are treated as sections.

Creating a Copy for submission without the EndNote codes

EndNote has a feature to remove all the codes and convert the file to standard text.

This is process cannot be reversed and ...

- Bibliography entries will not automatically update the bibliography
- You cannot change the style again
- All connections to the EndNote library and references are broken.

But what you can do is make changes that won't "undo themselves" when EndNote updates.

1. Whilst this feature in version X3 will force a copy of the file I would recommend that you copy the document you are going to use.
2. Open your document
3. From the EndNote tab select Convert Citations and Bibliography, then Convert to plain text.
4. When the dialog box appears choose Create a local copy and merge your changes later.

Amendments

WARNING: If any amendments are needed after this point then ensure you update the original copy which has the EndNote codes in it if you are going to need to change the output style or update the bibliography, then convert it to text again. If you amend the plain text version there is no way to rebuild the bibliography from that version.