

Managing Information Getting Started with EndNote: Demonstration of Cite While You Write and OSCOLA Referencing transcript

So today I am going to give you a demonstration of how the OSCOLA 4th referencing style works with the Cite While You Write feature. This feature allows you to insert in-text citations into a word document from your EndNote Library.

If you decide you are going to use OSCOLA and EndNote, you will need to accept that you will have to do a lot of manual inputting and editing when bringing references into your EndNote library. In addition, you will need to do some extra editing when you insert your in-text citations into your word document using the Cite While You Write feature. This doesn't mean it's not worth using EndNote with the OSCOLA 4th referencing style, but it does mean that you have to be even more aware of what you can and can't do and you will need to follow the EndNote guidelines religiously to ensure that your document doesn't become corrupted. Just like a jigsaw puzzle, using OSCOLA referencing style with the Cite While You Write feature takes time and patience, but if you have a picture to follow, it is so much easier. The aim of this brief demonstration will show you that bigger picture.

So what are the main alterations you will need to make when using OSCOLA and Cite While You Write.

As you can see from this slide Cite While You Write doesn't automatically put in any of the required full stops, pinpoints or notes to refer back to references already used. In addition, it doesn't automatically change 'Ibid' to ensure it has a lower case 'i'. It also doesn't differentiate between journal articles with a volume, which need round brackets and those journal articles with no volume, which require square brackets. Instead, it simply gives all journal articles round brackets around its year of publishing.

You will therefore, need to learn how to make these changes, but once you get the hang of these, they are pretty straight forward to do.

So now lets look at how Cite While You Write and OSCOLA 4th referencing style work in action and how you make those additions and changes that we have just outlined....

Firstly, I need to make sure my EndNote library is open in the background so that I can insert my references in my word document. I also need to make sure that I have the right style selected from the top drop-down menu and in our case, we are wanting the OSCOLA_4th_edn which is not to be confused with the OSCOLA 4th option that is also there. This is an easy mistake to make, so when you try this yourself, then please do double check that you have the right style selected.

Next I need to open my word document and click on the EndNote X8 tab, which is on the Word ribbon. Again, I need to make sure that I've got the right style selected from the drop-down menu here as well.

So the first thing I need to do is to place my cursor where I want to insert my first superscript number. Once I have done this, I then go to 'references' tab on the word ribbon and then I click on 'insert footnote'. And you will notice straight away that I have got a superscript one in my text and I have also got a superscript one at the bottom of the page ready to receive my footnote. Now I need to go and click on the EndNote X8 tab once again and this time I will click on 'Go to EndNote'. This

takes me into my EndNote library and here I can choose whichever reference I want to put into my document. I have a group of law references here at the side so I'm just going to click on this and click on the Mullin versus Richards case that I want to insert. So I highlight it, click on it and then go to the 'insert citation' button at the top of the page here. And you can see that it has inserted the reference there in the footnote, as well as creating a reference list for me at the bottom of the page.

However, if we go back to the footnote we can see that although the citation is correct, there is no full stop at the end of the footnote. The temptation is to manually put a full stop at the end of the citation, but I would strongly advise against this as manually entering changes like this can cause all sorts of problems. When I highlight the footnote, you can see that a grey box is appearing behind the citation appearing. This is what is called a field code. Every time you insert a citation into your word document from EndNote, a field code is placed behind the text and it is this code, which tells EndNote which reference to pull into your document. If you use the backspace in word to delete this footnote, then the text itself would disappear but the field code will not. As a result, your document can become corrupted. This is one of the main problems we see time and time again on the EndNote team, so please never manually add additions to your citations or use the back space to delete any mistakes. Instead you need to go back to the EndNote X8 tab at the top of the page and this time click on 'Edit and manage citations'. From here you need to make sure that the citation you want to change is highlighted, which it is, and then you need to put a full stop there in the suffix box. If for some reason you wanted to remove this citation altogether, then you need to go to the 'edit reference' box up here and click the remove citation. But today we are not going to remove the citation, as we want to see the full stop at the end of the footnote, so we are going to click on ok. And there you can see the full stop has been added at the end of the citation.

So I'll just insert another footnote to recap how it works. I will put my superscript number two here after McHale and Watson, so I go up to the word ribbon tab and I click on 'references', 'insert footnote' and the number two has appeared in the text and also in the footnote there. I go back to the EndNote X8 tab, I go to click on 'Go to EndNote'. I select the citation that I want, so this time it is the McHale versus Watson case. And then I click on the 'insert citation' button and there it has inserted it for me. I do need a full stop though as well, so I need to go back up there and click on 'Edit and manage citations'. I need to make sure that I have got the write citation selected, so it's the McHale versus Watson. I am going to put a full stop in the suffix box and then click ok. And as you can see, the full stop has been added.

So onto the next most frequently asked question we get with OSCOLA: how do you refer to the same source a second time or more times in your footnotes? You can see from my document that I need to refer to Mullin Verses Richards case again. This time there is a direct quotation from the case and because of this I will also need to add a pinpoint. So again I go to the word ribbon at the top, click on references and then click on insert footnote and it has put a superscript number three for me there in the text and also in the footnote. I then go to EndNote' X8 tab, 'Go to Endnote' and then I select the citation that I want and then click on 'insert citation'. You will see that its put a brief citation in for me as it already recognises that it has been cited before. However, this isn't complete. I need to refer back to the footnote where this citation has been used before and in my case, this is footnote one. And I also need to add a pinpoint to it as well as it's a direct quote. Again the temptation is to type in the details I need and then move on. But remember the field codes that I talked about earlier and why it isn't good practice to do this. Instead, I need to put my cursor next to the footnote and then I go up to the tool bar and click on 'Edit and manage citations'. Make sure that you have the right citation highlighted and then I need to put all the details in the suffix box. So I need to put a space and I need to refer back to footnote one, where it appeared first of all and then I need to put

the pinpoint in and then a full stop. And then all I need to do is click ok and then the changes should be reflected there in the footnote.

So that's what we do with a citation which is already been referenced, but doesn't follow on immediately after that first reference. But what about those citations that do appear immediately after. How do we deal with the upper case 'Ibid' problem that we talked about earlier on? So to answer this lets get another footnote in here, so after Barlow and James, we are going to click on 'references', 'insert footnote' and then 'Go to EndNote X8. This time we are going to click on 'insert citation'. So you either click on 'insert citation' or 'Go to EndNote'. So I am just going to show you an alternative here and click on 'insert citation' and then you need to type in your authors or authors there at the top. You need to make sure that you have your EndNote library open in the background as before, you click on find, there's the author and then I am going to click on insert. So you can see it has put Barlow and James in the footnote, but also in the reference list. And you will notice that the reference list is not in alphabetical order as it is ordering the references first by reference type, which is what you would expect from the OSCOLA referencing style. So you can see that it has put the two cases together first, McHale and Mullin and that these are ordered alphabetically and then it has put the journal article, Barlow and James, next. If we were then to go and add another journal article to this document, let's say it was by an author called Craig, you would then expect Craig to follow on from Barlow and James, because it's a journal article and because it's ordering it by type and then within that it is doing it alphabetically. If you wanted to say change the font of the reference list or add a line or change the name to say bibliography there, you have to use the tool here at the top. So there is a little button here called 'configure bibliography', you click on 'layout' and you can change font, what the bibliography title is and the line spacing as well here. This is just the same as the footnote, you would never use the backspace and you would never use manually entering here as well. Just because it is going to cause lots of problems that we have already talked about.

So now, let's refer to the Barlow reference immediately again. Because the preceding reference is the same one that we want to input, then I would expect to see an 'Ibid'. So lets do that now. I go to references, click on 'insert footnote', go back to EndNote X8, click on 'insert citation', make sure we have got Barlow and James selected, click on insert and there we can see 'Ibid' in the footnote. Unfortunately, you can see that we have an 'Ibid' with a capital 'I' instead of a lower case. Unfortunately, there is no simple way to manage this through the 'Edit and manage citations' button like we have done with the pinpoint and the full stop. Instead, in order to make this change I would have to strip the document of all the EndNote field codes and then make the alterations after this had been done. However, this can be problematic as once you have striped the document of its field codes you cannot get the codes back in, so it is something that you would do only when you have added all your references and when you no longer need to make any significant changes. It is advisable however, to always keep a back up copy of the document with the field codes, in case you do have to go back in and add other references in the future.

So just to briefly demonstrate how to do this, I will need to go to the EndNote X8 tab and then click on 'convert citations and bibliography' and then click on 'convert to plain text'. And when I do this, you will see that we get a pop up box that appears, which basically tells you that it's going to creating a new copy of your document and the old one will remain open and untouched with your field codes intact. So I am going to press yes, ok, I want to continue. You can see it has created a new document up here for me, so in order for me to not get mixed up I need to create a meaningful name for it. So I am going to decide where I am going to save it and I am going to put 'plain text' in the file name so that I know that it doesn't have any field codes there. So I click on save, you can see

that the changes have happened there at the top to the document name and I can scroll down and I can go and change the capital 'I' in Ibid to a lower case 'i' with no fear of corrupting the document as there are no field codes there. If I needed to I could also change any round journal article brackets to square, when I do this, as this is the only way to do this as well, and there is no way of doing that through the 'Edit and manage citations'.

So today we have covered how to use OSCOLA 4th referencing style and the Cite While You Write feature. As we have seen this isn't without it's challenges, but if you follow the rules and guidelines of EndNote and are familiar with the problems that you may encounter then it is possible that EndNote and the Cite While You Write tool may save you time. However, it is up to you to decide whether this tool will work for you or not. If you want to find out more about OSCOLA and EndNote or ask the EndNote team any questions, then do check out our EndNote library guide which can be found via the library website or by using the direct link on this slide.