Reference Management for Political Science

Cody A. Drolc

Note: This document should not be your complete guide to maintaining and generating references. Do what works for you but be consistent!
Edited: August 8, 2017

This workshop requires the use of two pieces of software:

> JabRef: http://www.jabref.org/
>
> EndNote: available for free through the University of Missouri[1]
> https://doit.missouri.edu/services/software/software-sales/educational-software/

JabRef is an open source reference manager specifically designed for BibTeX and BibLaTex. References generated using this method can be formatted to fit any style with a couple of changes in your LaTeX code. There are some upfront costs, but the payoffs will be well worth the time investment. References compiled using JabRef are transferable to EndNote using a self-executable Java converter (included in the available files) written by Trent Apted of the University of Sydney.[2] The converter is not perfect so you *must* check the references once you import them to EndNote!

EndNote is an integrated reference and article manager produced by Thompson Reuters. It is compatible with Microsoft Word, BibTeX, and BibLaTeX. EndNote is designed to handle more than just references, but we will not explore these other features. I do not recommend EndNote's article management feature because it creates unnecessary files on your computer and makes transferring reference databases significantly more difficult. The basics of the program will make citing in Microsoft Word and creating BibTeX files easy.

[1] If you are using the document and are from another university, check to see if they provide EndNote to students and faculty. If your university does not provide the software, it does cost around $250 without student pricing. Available here: endnote.com

[2] This converter used to be available here, but the link is currently broken.

JabRef Basics

When you first open JabRef you will need to create a database. This database can either be a master or for an ad hoc project. I recommend keeping one of each. On this note, JabRef does not work well if your database is housed directly on a cloud-synced platform such as Dropbox or Google Drive (but some disagree with me). Once you create a new database you can start adding in references.

The plus sign located in the tool bar will start the process. You can select the type of entry whether it is a journal article, a book, or a book chapter.

After you select the entry type, add in the necessary information such as author, date, and title. You will have to switch between various tabs such as `Required Fields` and `Optional Fields` in order to add the information such as volume and issue number.

Follow every author with "and" (except the last one) otherwise BibTeX will get confused when you compile the references later.

Important! You must include a `Bibtexkey` for your references to work properly with LaTeX. This key should be unique to each reference. I recommend doing author-year so that it reads like `KingTomzWittenberg2000`. We will see how these work later on.

> Make sure you are consistent when generating citation keys. This will make your life easier when inputting the citations later and prevent you from having to look up keys as you write.

You will not need to save individual entries once you're done entering the information, simply move on to the next by clicking the plus sign again.

Once you are finished adding in all of your references you should save the database in order to return to it at a later time if necessary. These files will have a `.bak` file extension and will open exclusively with JabRef.

In order for your database to be compatible with BibTeX and BibLaTeX, you must `Save database as` and change the file extension to `.bib` using the drop-down menu.

The hard part is done!

For your `.bib` file to work with LaTeX, you must save the file in the folder where your master document is located. You can also set a path directory to the file if you like.

Quick tip (but one of the best tips in this document): JabRef will automatically pull the necessary information using a DOI number. To access this feature:

> `View` → `Web search`
> Change the gray drop-down menu to `DOI to BibTeX`
>
> Using this feature requires being connected to the internet and please note that not all articles will have DOI numbers.
>
> Paste the DOI number into the box and click `Fetch`
>
> A dialog box will ask you to confirm that JabRef found the correct article.
>
> You may have to edit the information pulled from the web and add a `Bibtex key`.
>
> I typically delete the DOI number out of the `URL` box because it will show up in your references, which adds unnecessary clutter.
>
> This feature is not perfect but it can save you a lot of time.
>
> Last thought: I use JabRef in tandem with this feature to construct reference databases that I can then import into EndNote so they can be used with Word or LaTeX.

Try it out: cite Bell and Jones (2015)

> DOI: 10.1017/psrm.2014.7

Second quick tip: Google Scholar will generate the .bib code if you click on "cite" and then "BibTeX" after looking up an article. Follow the same procedure for manually creating a citation and then paste the code into the last window, {} `BibTeX Source`.[3]

[3] I use this method most often but be warned that many of Google Scholar's citations will need tweaking.

EndNote Basics

EndNote will require more front-end work for you to get started, but its reference filing capabilities and additional features are well worth the effort. However, EndNote will create extra files on your computer that are unnecessary. Like JabRef, do not save your working library in a cloud-based location like Dropbox or Google Drive. *Just don't*. EndNote also gives you the option to sync your library online. This is another feature that I recommend avoiding. If something goes wrong with your library, the online copy will overwrite what you're currently working on.

Personally, I use EndNote as a secondary and more organized master for all my citations because it allows you to create groups. Searching an EndNote library is also much easier. But, creating a reference in EndNote is not as streamlined as it is in JabRef. This is why I create citations in JabRef and then move them into EndNote.

When you first open EndNote, create a new library and save it in a reasonable place (these are `.enl` files).

Once you establish a library the EndNote environment will open up with your groups on the left, options on the top, and reference details on the right.

To create a reference, click on the page with the green arrow on it. This will open a new window where you can input the needed information.

The drop-down menu next to `Reference Type` allows you to select the appropriate template for you to add information.

When inputting multiple authors, you can separate them by semicolons or enter them on another line (preferred).

For journal articles don't worry about entering a start page, just do the page range after the issue number.

In order to use EndNote with BibTeX, you will need to create keys again. These go under the `Label` category when you're manually creating a reference. EndNote will not generate these automatically so you will need to create them manually. If you *only* plan on using Microsoft Word, then don't worry about this step.

When you create references, EndNote will give you the option to attach PDFs. Do this at your own risk. The program will create a number of unnecessary folders.

When you're done adding in the information, exit out of the reference window and confirm that you want to save the reference.

This will take you back to the main library where you can add your newly created reference into a group or begin citing.

If you are using EndNote with LaTeX, select the citations you need and export them as a `.txt` file with the BibTeX export option selected.

Add the `.bib` file extension to the end of your reference file name and save it in the same folder as your TeX document.

What to do if the BibTeX export option is not available:

`Edit` → `Output Styles` → `Open Style Manager`

Select `BibTeX Export`

Pro tip:

Google scholar will create a reference file that can be directly imported into EndNote. Clicking "Cite" and then "EndNote" will begin the download. You can delete this file after opening it as it will save directly into your EndNote library. More often than not you will need to edit the imported citation.

JSTOR will also allow you to export citations in an EndNote-readable format, but Google Scholar will be your most efficient tool. You shouldn't have to edit citations from JSTOR except for deleting the DOI.

JabRef to EndNote

Moving citations from JabRef into EndNote requires converting a `.bib` file into a `.xml` file that is readable by EndNote. Included in the zip file for this workshop is a Java converter written by Trent Apted of the University of Sydney that will do the trick. You do not need to install this converter—simply open the `.bib` file you export from JabRef in the Java converter and follow the prompts. Save the `.xml` file in a convenient place and open EndNote. From the import file function in EndNote, you will select the import option `EndNote generated XML`. After you import the files you're done until you sort them into your desired folders. The conversion that takes place is not perfect; double check everything you transferred into EndNote for changes to reference type, pages, or label.

For an additional JabRef to EndNote process click here. I believe the Java converter is easier to use than this one.

EndNote to JabRef

Going from EndNote to JabRef is a much easier process. EndNote readily generates `.bib` files, which can be directly imported into JabRef. From EndNote, you will need to export your references with the BibTeX export option and then add `.bib` to the end of your file name. This prevents you from having to change the file extension later so JabRef can read it. In JabRef you have the option of either importing into your current database or a new one; select the option that fits your needs and then simply open the file. JabRef will confirm the references you want to import and after you click okay the process is done.

Citing while Writing in LaTeX

LaTeX contains a native citation system, but I recommend using the `natbib` package. This package will give you more control over how your entries look and will allow you to change the bibliography style by simply changing the `.bst` file. The styles supported by natbib are: harvard, apalike, chicago, astron, and authordate. I will show you how to make the package produce citations and a reference page that meet the guidelines required by the *American Political Science Review*. You will need the `apsr.bst` file included in the available files if it is not already in your MiKTeX directory. Check this by going to a path similar to:

```
C:\Program Files\MiKTeX 2.9\bibtex\bst\harvard
```

Paste the file included for this workshop into the `harvard` folder if `apsr.bst` is not listed. You're ready to go now! If you're using the superior TeXLive distribution, you shouldn't have to worry about this step.

Important but unfortunate note: the `apsr.bst` does produce the correct full references but the in-text citations will have a comma after the author when they shouldn't. The recommended preamble at the end of this document fixes this problem.

If you need a different citation style, check out TeX blogs to see if someone has already created a `.bst` file that meets another journal's guidelines. There are enough geeks out there that you will have a decent chance of finding what you need. If not, journals typically use style guides that are well established such as `chicago`, which is included in the `natbib` package. The *APSR* uses the same style as Harvard.

Citing with `natbib`:

\citet{king2001}	$\Longrightarrow$ King et al. (2001)
\citet[∼50]{king2001}	$\Longrightarrow$ King et al. (2001, 50)
\citep{king2001}	$\Longrightarrow$ (King et al. 2001)
\citep[∼50]{king2001}	$\Longrightarrow$ (King et al. 2001, 50)
\citep[see][]{king2001}	$\Longrightarrow$ (see King et al. 2001)
\citet*{king2001}	$\Longrightarrow$ King, Honaker, Joseph, and Scheve (2001)
\citep*{king2001}	$\Longrightarrow$ (King, Honaker, Joseph, and Scheve 2001)
\citep{king2001, meier1987}	$\Longrightarrow$ (King et al. 2001; Meier 1987)
\citeauthor{king2001}	$\Longrightarrow$ King et al.
\citeauthor*{king2001}	$\Longrightarrow$ King, Honaker, Joseph, and Scheve
\citeyear{king2001}	$\Longrightarrow$ 2001
\citeyearpar{king2001}	$\Longrightarrow$ (2001)
\nocite{king2001}	No citation, just appears in reference page–add after paragraphs
\nocite{*}	Adds all entries in your `.bib` file into your reference page

Compile your bibliography with these commands:

```
\bibliography{bibliography name here}{}
\bibliographystyle{apsr}
```

These commands will go at the end of your document before `\end{document}`. You will simply put in the name of your `.bib` file, press F8 a couple of times (if you're using TeXstudio), and then recompile the document. It is probably best to add these lines of code in before you start citing so you do not receive errors every time you compile the document.

Pro Tips:

> You will need to escape special symbols in LaTeX by either editing the `.bib` file using math mode or avoiding them altogether.
>
> & is the most common. Escape this by replacing the symbol in the `.bib` file with `$\&$`

Square brackets also have a special designation that need to be escaped especially when using the later edition of text. Do this by replacing the brackets with `\lbrack` and `\rbrack`

These are the two most common symbols that you will encounter when creating references. For more, refer to:
http://web.ift.uib.no/Teori/KURS/WRK/TeX/symALL.html

It is common for your file to not compile correctly the first time. Run the BibTeX option in LaTeX multiple times and recompile your document. Also, make sure your `.bib` and `.bbl` file are both closed before compiling.

Citing while Writing in Word

EndNote integrates directly with Microsoft Word. After installing EndNote you should have a new tab in Word that is labeled `EndNote X7`. This tab will be your hub for easily integrating citations. The `Insert Citation` function will be used most often.

Unfortunately, the *American Political Science Review* style is not native to EndNote. The necessary file is included in this workshop.

Open the `Ameri Political Sci Review.ens` file by double clicking it.

The file should open directly into EndNote.

Once open:

`File` $\longrightarrow$ `Save As`

Delete "copy" out of the file name and save it.

You're now free to exit out of this window.

EndNote is compatible with many different citation styles, which can be found at:

http://endnote.com/downloads/styles

The output style can be changed from the tab in Word or within EndNote. For all of this to work properly, both EndNote and Word will need to be open at the same time. I recommend doing most of the inserting from EndNote with the `Insert Citation` button or by pressing `Alt + 2` while your reference is highlighted. Doing so will put the parenthetical citation where your cursor is in the word document and add the full citation to the end of your document. If you need multiple citations at the same time, simply highlight both of them and hit insert again.

Recommended Preamble

The following preamble will "chew" through just about any set of code you throw at it. The `tikz` package will probably only be a rare tool for most of you; it is fine to comment it out to avoid additional computational time for TEXto load the package on each compilation of your document.

```
\documentclass[12pt]{article}
\usepackage{amsfonts, amsmath, amssymb}
\usepackage{epsfig, subfigure, subfloat, graphicx, float}
\usepackage{setspace, multirow, array}
\usepackage{verbatim, rotating, paralist, pdflscape}
\usepackage[english]{babel}
\usepackage[autostyle]{csquotes} % time saver
\usepackage{natbib}
\usepackage[letterpaper, margin = 1in]{geometry}
\usepackage{fixltx2e}
\usepackage{palatino, url, multicol}
\usepackage{natbib}
\usepackage[colorlinks = TRUE,
urlcolor = blue,
linkcolor = red,
citecolor = blue]{hyperref}
\parskip=6pt
```