EndNote Desktop – all about output styles (citation formats) and bibliographies

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EndNote allows you to format your paper with any output style (citation format) you need. This will give you the proper in-text citation for the output style as well as a properly formatted entry in your reference list/bibliography in whatever order the style calls for (alphabetical, in order of citation, etc). Sometimes you may need to make small (or large!) changes to an existing style or display a field in a given style that isn't typically required in that style (for example, including your "research notes" in the bibliography to produce an annotated bibliography for n instructor or perhaps for a grant). EndNote allows all of these advanced capabilities.

1. Picking an output style in Cite While You Write.
2. Using the Output Style Manager
3. Previewing references in a given output style.
4. Editing an output style to create a custom style to show the fields and format you need.
5. Can I print a bibliography of items in my library separate from my paper
6. How do I produce an output style annotated bibliography that includes my annotations?

1. Picking an output style in Cite While You Write.

When you are dropping references into your paper, you select the output style using the dropdown menu in the EndNote X5 plugin.
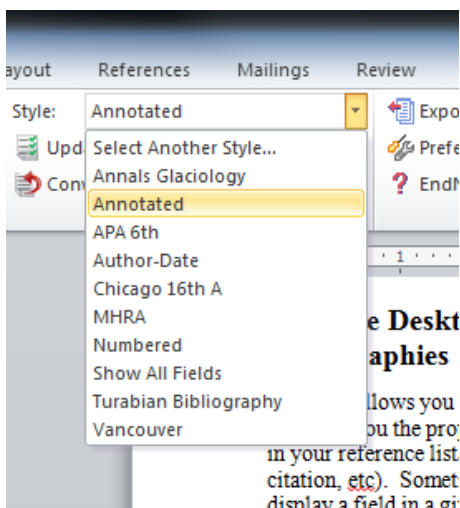

Note that only a handful of styles are visible in the "quick list". You can add styles to that short list using the "Output Style Manager" in your EndNote Desktop Client (see section 2 and 3). To select another style, select "select another style"
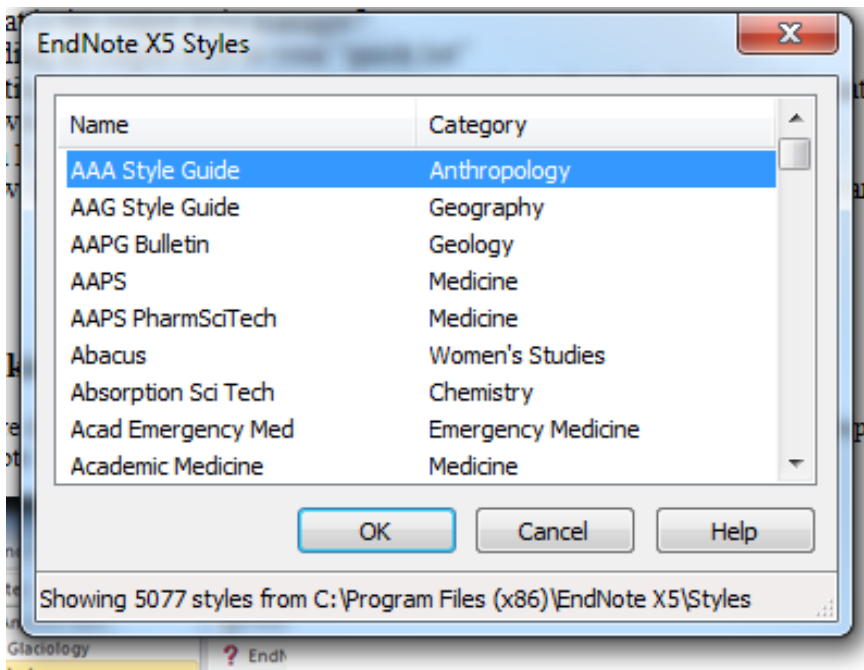
Highlight the style you wish to use and select OK.

2. **Using the output style manager (adding styles to "quick list", read about a style, download new styles, search for styles, edit styles, etc.)**

In your EndNote program, select **Edit > Output Styles > Open Style Manager** to access the Output Style Manager.
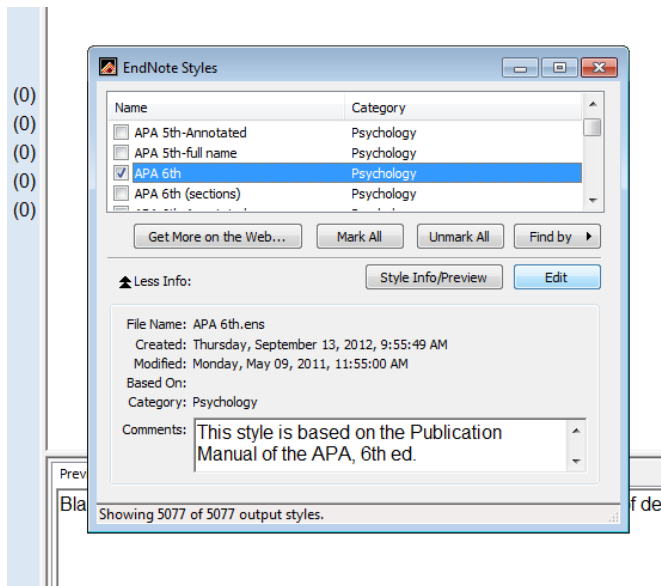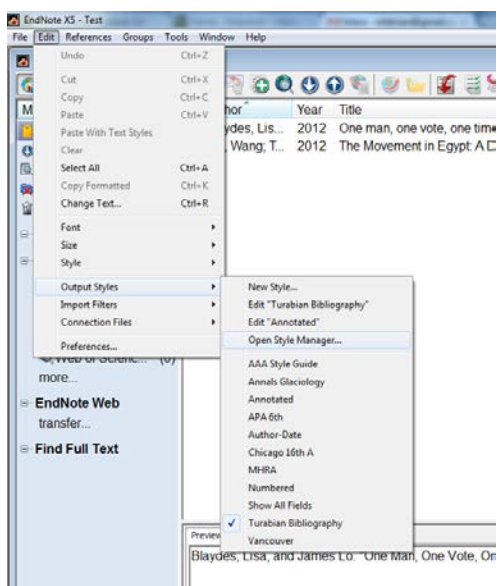

From here, you can:

   a. Add styles to your "favorites" list that will be displayed in the EndNoteX5 style dropdown and your "quick view" list in EndNote

b. Read notes about the specifics of a style to see what it includes and how it is formatted.
c. Download new styles from the EndNote website.
d. Find common styles by subject area.

3. Previewing references in a given output style.

Go to **Edit > Output Styles** to select the style you want to display in the preview screen below your library when you click a reference.

Go to **Edit > Output styles** then select the style you want to
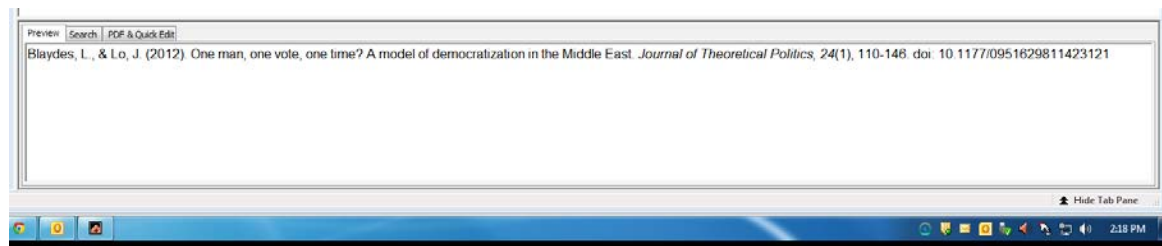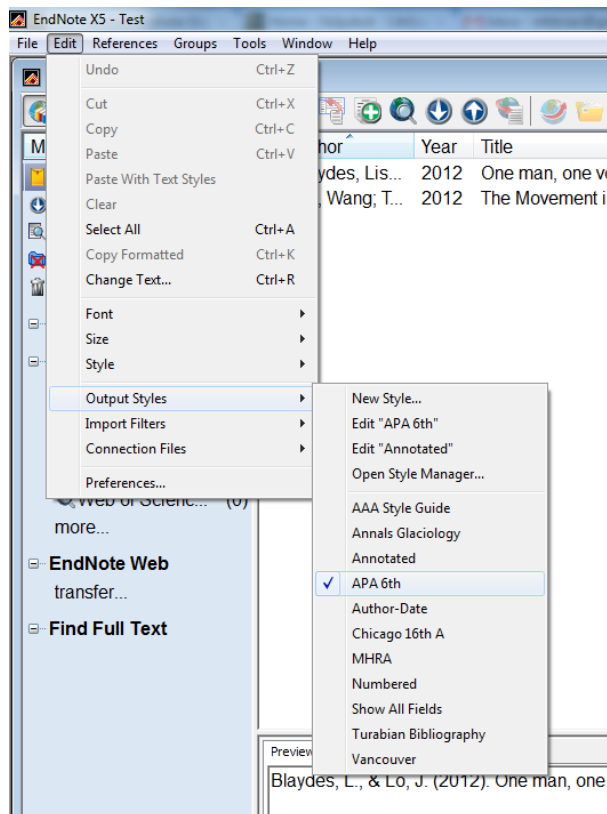
4. Minor edits to intext citation (such as excluding the author, adding page ranges, etc. to an in-text citation.

Go to Edit And Manage Citations.

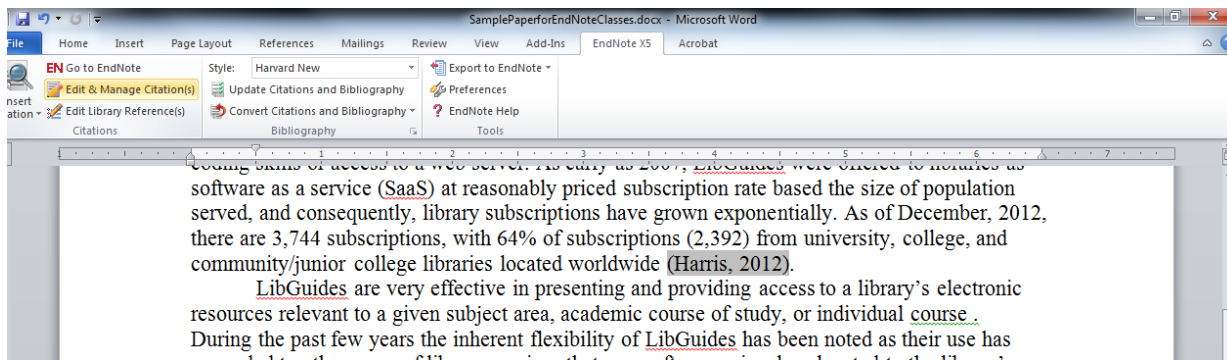Highlight the in-text citation you want to edit. A common edit is "exclude author" for when you have mentioned the authors name in the text just before the citation. You can also add a "suffix" if the style calls for page numbers for subsequent references of the same work. The Edit Reference dropdown gives you other options, such as removing the reference entirely.

5. Editing an existing output style to create a custom style to show the fields and format you need.

Go to the Output Style Manager (see Section 2 above) and select the style you want to edit, then click "edit"

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EndNote Styles

Name	Category
APA 5th-Annotated	Psychology
APA 5th-full name	Psychology
✓ APA 6th	Psychology
APA 6th (sections)	Psychology

Get More on the Web…   Mark All   Unmark All   Find by ▶

▲ Less Info: Style Info/Preview   Edit

File Name: APA 6th.ens
Created: Thursday, September 13, 2012, 9:55:49 AM
Modified: Monday, May 09, 2011, 11:55:00 AM
Based On:
Category: Psychology

Comments: This style is based on the Publication Manual of the APA, 6th ed.

Prev
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Showing 5077 of 5077 output styles.

Plain Font ▾ | Plain Size ▾ | **B** *I* U P | A¹ A₁ Σ ABC

- About this Style
- Anonymous Works
- Page Numbers
- Journal Names
- Sections
- Citations
  - Templates
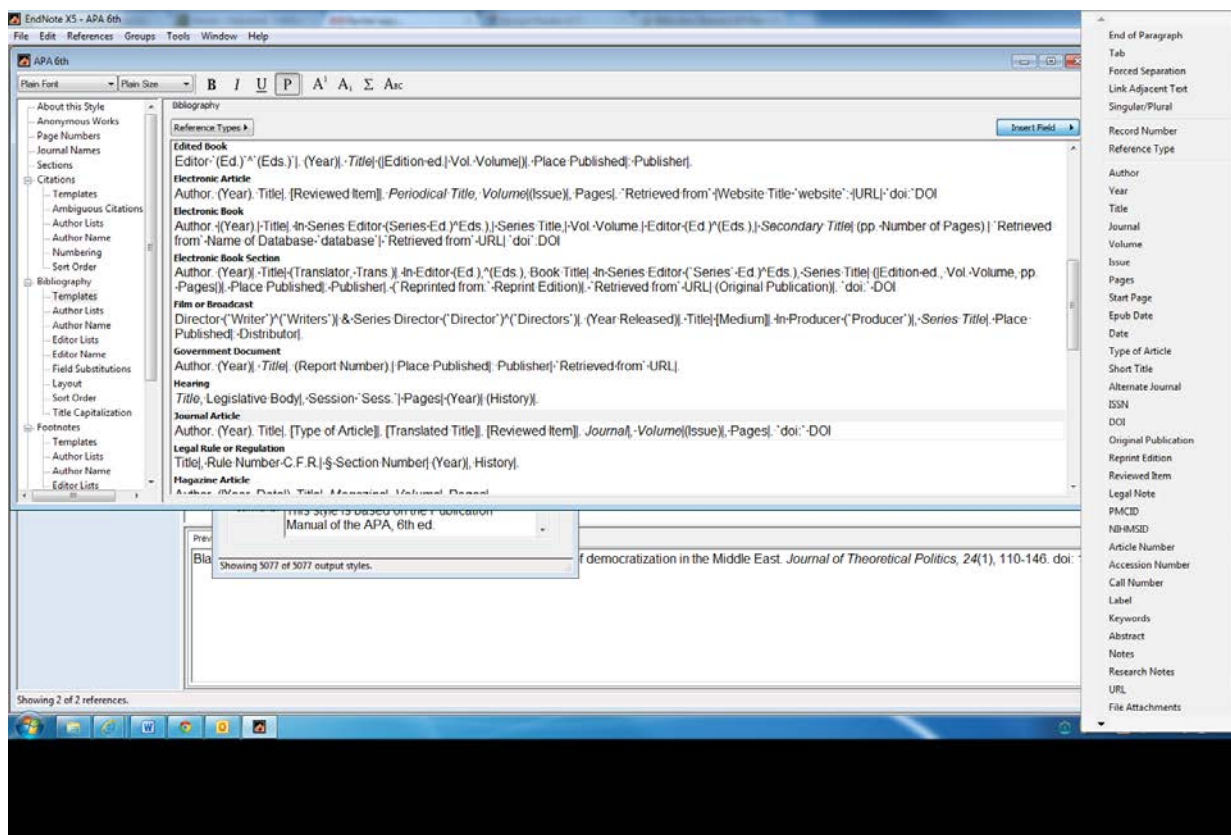 - Ambiguous Citations
  - Author Lists
  - Author Name
  - Numbering
  - Sort Order
- Bibliography
  - Templates
  - Author Lists
  - Author Name
  - Editor Lists
  - Editor Name
  - Field Substitutions
  - Layout
  - Sort Order
  - Title Capitalization
- Footnotes
  - Templates
  - Author Lists
  - Author Name
  - Editor Lists

Name: APA 6th
Based on:
Category: Psychology
Created: Thursday, September 13, 2012, 9:55:49 AM
Last modified: Monday, May 09, 2011, 11:55:00 AM
Comments and limitations:

This style is based on the *Publication Manual of the APA, 6th ed.*

Important Note: This style is based on some changes to the base reference type matrix of EndNote. For those of you using a version of EndNote prior to version 4.0.2 you will need to follow the instructions which can be found at:

http://www.endnote.com/support/   Just search for "APA 6th"

The APA style is a very complex style. EndNote can handle most of the requirements of this style, but EndNote does not include the full spectrum of reference types that are described in the APA manual. If you are citing a reference type that is not included in EndNote, you should consult the APA manual. You may need to add or modify your own reference types, if so you can follow the instructions in the help file under "Adding and Deleting Reference Types."

This style is based on the Publication
Manual of the APA, 6th ed.

From this screen, you can set the rules for the various fields of the in-text citations and the bibliography. To add fields to the bibliography, select **Templates** under **Bibliography**, then add click in the format for a reference type, place your cursor where you want the field, then use the **"insert field"** dropdown in the upper left.

When finished, you will be prompted to save the edited style with a new name so it won't over-write the original version of the style. If you accidentally overwrite, you will need to re-download the style from EndNote's website.

IMPORTANT NOTE ON SAVING A CUSTZOM OUTPUT STYLE FOR PORTABILITY:

When you create a new output style, it will save to the folder/directory specified under **Edit-Preferences – Folder Locations**. If you are working from a thumb drive library on a public machine, make sure you move the output style you created to your thumb drive so you can move it from machine to machine. Simply clicking on the output style file will load it into the EndNote client you are working from during that session.
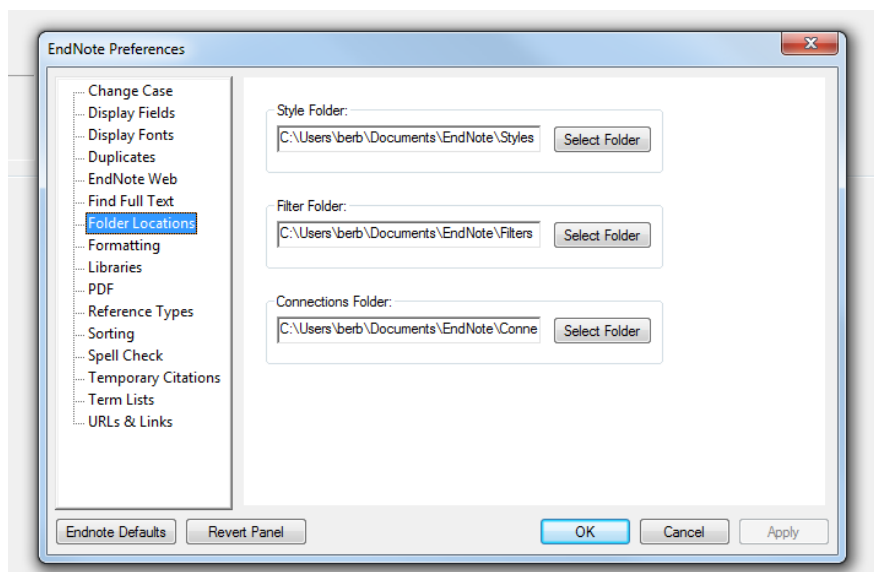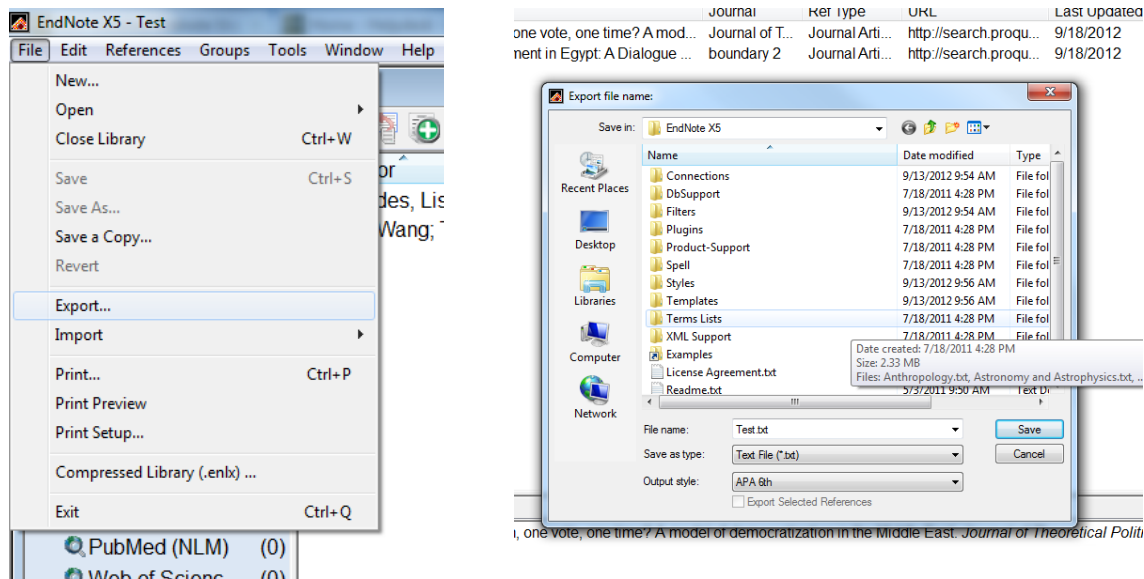
6. Creating a new style from scratch

You can get a blank template to set citation and bibliography fomrat rules by going to **Edit > Output Styles > New Style**

7. Can I print a bibliography of items in my library separate from my paper

Yes. Go to **File > Export**:

a. Name the file
b. Pick the file type you wish to save it as (text/rich text can be read in Notepad/Word Pad and cut/pasted to word). You can also print and cut/paste easily from the HTML style.
c. Pick the output style
d. Note where you are saving it so you can open it to view it.

8. How do I produce an output style annotated bibliography that includes my annotations?

In your EndNote library, put your annotations in the "Research Notes" field of each reference.

Go to the Output Style Manager (see Section 2 above) and select the style you want to edit to include annotations, then click "edit"
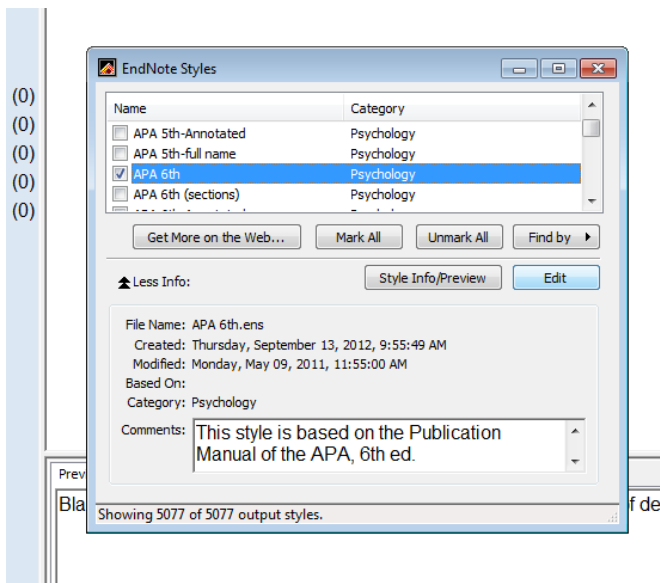
To add fields to the bibliography, select **Templates** under **Bibliography**, then click in the field for each relevant reference type, place your cursor where you want the annotations to appear in the reference (probably as the last field), then use the **"insert field"** dropdown in the upper left to insert "research notes". You have to do this for each reference type you have in your bibliography.
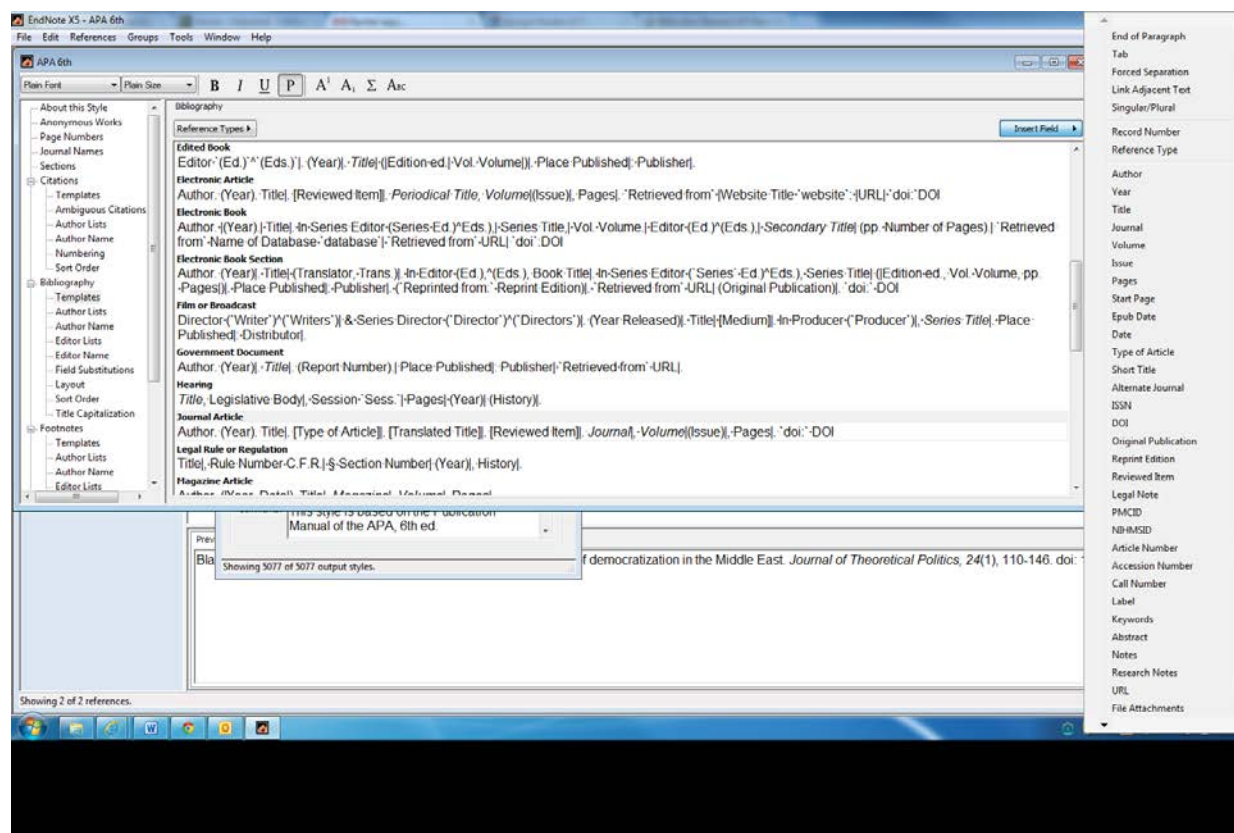
There are special characters or 'fields' with which EndNote controls how records appear in the bibliography in the citation template. Place your cursor where you want the character in the template. Go to **Insert Field** on the right and select the appropriate character (you could also copy/paste it from elsewhere in the template:

- **Singular/plural (^ caret symbol)** - used if there is different text for singular/plural forms e.g. (Ed.),^(Eds.)
- **Link adjecent text** - a non-breaking space (shown as a small grey diamond in the template) used to link adjacent text to a field so text doesn't appear if the field is empty.
- **Forced separation (| pipe symbol)-** used to separate punctuation from adjacent fields. e.g. you might want a full stop at the end no matter what fields are empty.
- **Field names as literal text (`back apostrophe symbol)-** used if you want text in your records that has already been used as a field name e.g. if you want the word 'year' as well as the field year.
- **To remove a field** - Highlight > click **Delete** on your keyboard.
- **To substitute fields** select **Bibliography > Field Substitutions** and tick the appropriate boxes e.g. the URL field can be inserted for records without a DOI.

When finished, you will be prompted to save the edited style with a new name so it won't overwrite the original version of the style. If you accidentally overwrite, you will need to re-download the style from EndNote's website. So if I edit APA 6th, I would call it *APA6th – annotated bib* or something like that to distinguish it from the original.   To print the bibliography in your new style, go to Section 7 above.