

Referencing: EndNote Designing citations and bibliographies



The small print

Prerequisites

Time in the classroom is precious – it is an opportunity for you to interact with the workshop leader and other participants through questions and discussions and to share your experiences and concerns. To make the most of this time we sometimes ask you to carry out learning activities ahead of the workshop so that everyone comes into the class with the same basic knowledge. We keep this prior learning to a minimum and often make use of online videos. Online videos provided through ‘Molly’ can be accessed by University members anytime, anywhere, through a browser or app.

Your course booking will tell you if any prior learning activity is required. If you don’t have an environment where you can do this learning, you can come along to one of our ‘quiet’ sessions. These are scheduled every week in normal term-time, and are a quiet space where you can work through ‘Molly’ videos or other workshop resources.

If you arrive for a workshop without having done the prior learning, the workshop leader may suggest that you come back on another session.

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About the workshop designer

Pamela Stanworth has over a decade’s experience working on formal documents, theses and reports with researchers and departments across the University. She brings a pragmatic approach to building documents that are effective, reliable and sustainable.

Pamela’s roots are in engineering, working with blue-chip industrial companies, technical consultancy and small businesses. Her commitment in teaching and consulting is to enable people to use appropriate technology in their work, efficiently and to a high standard.

Revision history

Version	Date	Author	Comments
1.0	April 2017	Pamela Stanworth	Created
1.1	September 2019	Pamela Stanworth	Updates
2.0	January 2021	Pamela Stanworth	EndNote 20 version

About this workshop

This workshop helps you to manage the way your citations behave in your academic documents, and control the appearance and content of your bibliographies.

What you will learn

We will discover how *EndNote's* output styles work, to manage the appearance and behaviour of your citations, footnotes and bibliographies.

We will discuss how to design your own templates, whether your citations appear in-text or in footnotes, or perhaps as simple numbers.

We will explore the wide range of features that you can use to tailor the way your citations and bibliographies behave. We will talk about situations when you might unformat a document, and why that would be useful.

We will include pointers to other workshops and further resources that will help you go on later to create and manage documents.

What you need to know

The ideas and techniques covered in this workshop will apply to a range of tools. We will demonstrate using *EndNote*, which is widely used. However, the concepts will be the same or similar, whichever reference manager app you decide to use.

I will assume that you are reasonably confident in using the tool you have chosen to use to manage your research reading. With your chosen tool, you will need to be able to:

- Create a reference in a library
- View and amend a reference
- Navigate around a word-processed document
- “Cite while you write”, inserting citations in text or in footnotes as appropriate
- Apply a variety of output styles for citations and bibliographies in a document
- Navigate the commands and menus, using Help as necessary

If you need to review these activities, Molly is a great place to get guidance. There is an activity with relevant videos in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “EndNote citations activity”.

The resources you need

Sample documents that you can use to experiment with will be available, but you may like to bring along your own.

The resources for most workshops, including any pre-course activity, are in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for “EndNote citations”.

Unless you have been told otherwise, in classroom workshops there will be a computer available for you to use with *EndNote for Windows* and *Word for Windows* installed.

You can use your own computer with your preferred app installed if you want to – just bear in mind that I am not an expert in every app (although I am sure that between us we will be able to sort out most problems!).

Learning Objectives

This workshop has the following learning objectives:

Learning Objective One – Changing the output style in a document

Learning Objective Two – Options for an individual citation

Learning Objective Three – Revising an output style (Citations template)

Learning Objective Four – Revising the bibliography templates

Learning Objective Five – Revising the footnotes templates (*Optional*)

Learning Objective Six – Short form and other features of footnotes (*Optional*)

Learning Objective Seven – Page numbers

Learning Objective Eight – More features of citation behaviour

Learning Objective Nine – Bibliography options

Learning Objective Ten – Removing format

Learning Objective One – Changing the output style in a document

Open the library **labwork.enl** and the *Word* document **Sample Tech Paper2.docx**. Examine the citations in this document.

Apply the **Author-Date** output style, updating if necessary, then apply another well-known style such as **Harvard**, and notice the further differences.



Learning Objective Two – Options for an individual citation

Start by ensuring that the document has the **Harvard** style applied.

You will work on some individual citations, changing their appearance so they differ from the standard template:

Change the **Bordier, 2003** citation so that it excludes the year

Add the prefix **also discussed in** to a suitable citation

Insert a citation at the start of a sentence, with a suitable format

Edit another citation, and try some other options from the dialog

Note that not all output styles can display cited pages (**Pages** added using this Edit Citations dialog); page numbering will be discussed in a later chapter.



Learning Objective Three – Revising an output style (Citations template)

Open the **Author-Date** style for editing, saving it with a new name such as **01Author-Date Copy**

Edit the Citations Template to provide this effect:

(Jones, 2006; Wireless network deployments)

Confirm that the style works as required in the document.



Learning Objective Four – Revising the bibliography templates

Continue editing the style **01Author-Date Copy**.

Examine the different templates that have been set up for each reference type, in the bibliography.

Make some changes to formatting, punctuation and fields for the **Journal Article** reference type, then confirm the effect in your document.



Learning Objective Five – Revising the footnotes templates (*Optional*)

Apply the output style **Chicago Footnote**. This style is used for citations in footnotes. Any citations not in footnotes are hidden for the time being; they will re-appear when you apply a non-footnote style in a later exercise.

Create a copy of the style, with a template so that all citations in footnotes are similar to this:

Jones 2006, "Recent Advances in Dithering", (Macmillan)

Test the template; for example, look at the footnote citation (Ginsberg, 1988) at the bottom of page 1.



Learning Objective Six – Short form and other features of footnotes (*Optional*)

Notice that the second citation of the Ginsberg paper, later in the document, appears using a shorter form. Edit the Ginsberg reference in the *EndNote* library, adding a Short Title such as **stressful venepuncture**. Confirm that this appears in the second, short citation of the paper.

Work on your copy of the style **Chicago Footnote**. Edit the template for the short form of journal articles, similar to this: **Jones , 2006** . Confirm your changes in the *Word* document.

Experiment with other features of footnote citations which interest you.



Learning Objective Seven – Page numbers

Apply, if necessary, the **01Author-Date Copy** output style. In the *Word* document, try inserting a page number into one citation - initially, the cited page numbers do not appear with the citation.

Modify the output style to display the cited page numbers.

Experiment with changing the **Page Numbers** formatting options, which are listed in the Style Editor window near the top of the category panel.



Learning Objective Eight – More features of citation behaviour

Apply the style **APA** to the document. Examine the way this style handles ambiguous citations (near the bottom of page 1 and the top of page 2, notice that we cite two different papers written by Cassar in 1980). Create a copy of the style, and change the way this output style handles these **ambiguous citations**.

Two books by Trevor, with different dates, are cited in the 3rd body-text paragraph on page 1. Experiment with changing the repeated author option in **Citations | Author Name**, and see the effect on this pair of citations. Try out some other options for author names.

Explore the effects of some other settings such as **Anonymous Works** (you may need to create a suitable reference in your library).



Learning Objective Nine – Bibliography options

Create a copy of the output style **Harvard** (this style is used for in-text citations, so any effect on citations in footnotes is incidental).

Experiment with the effect of settings such as **Bibliography| Title Capitalization** and **Sort Order**.

In the *Word* document, using the **Format Bibliography** dialog, change the font and font size, and adjust the spacing around bibliography items. Explore the use of hyperlinks - will you want to use these in your own work? For example, you could use hyperlinks while drafting a document, then remove them just before printing.



Learning Objective Ten – Removing formatting

As a precaution, save a copy of the document with its formatted citations and call this **Sample with citations**.

Unformat citations in the whole document. Examine the effect on in-text citations and the bibliography. This is a good way to expose any citations that are misbehaving. When ready, you can apply another style.

Turn off Instant Formatting and see what now happens when you insert a citation. Will you want to work with Instant Formatting turned on or off?

Create a separate version of the document with no field codes (“finalised” for publishing). Save it as **Sample Finalised**.



Further information

Getting extra help

Course Clinics

The IT Learning Centre offers bookable clinics where you can get pre- or post-course advice.

Study Videos from Molly

Molly is our collection of online courses and resources. This includes providing LinkedIn Learning video-based courses free to all members of the University. Visit skills.it.ox.ac.uk/molly and sign in with your Single Sign-On (SSO) credentials.

Some courses recommend pre- and/or post-course activities to support your learning. You can watch these online videos anywhere, anytime, and even download them onto a tablet or smartphone for off-line viewing.

If you need a quiet place to work through learning activities away from distractions, the IT Learning Centre offers frequent 'quiet' sessions where you can book a place. These are scheduled frequently during normal term times.

About the IT Learning Portfolio online

Many of the resources used in the IT Learning Centre courses and workshops are made available as Open Educational Resources (OER) via our Portfolio website at skills.it.ox.ac.uk/it-learning-portfolio.

Find the pre-course activity for this course in the IT Learning Portfolio: visit skills.it.ox.ac.uk/it-learning-portfolio and search for "EndNote citations activity".

About the IT Learning Centre

The IT Learning Centre delivers over 100 IT-related teacher-led courses, which are provided in our teaching rooms and online, and we give you access to thousands of on-line self-service courses through Molly (powered by LinkedIn Learning).

Our team of teachers have backgrounds in academia, research, business and education and are supported by other experts from around the University and beyond.

Our courses are open to all members of the University at a small charge. Where resources allow, we can deliver closed courses to departments and colleges, which can be more cost-effective than signing up individually. We can also customize courses to suit your needs.

Our fully equipped suite of seven teaching and training rooms are usually available for hire for your own events and courses.

For more information, contact us at courses@it.ox.ac.uk.

About IT Customer Services

The IT Learning Centre is part of the Customer Services Group. The group provides the main user support services for the department, assisting all staff and students within the University as well as retired staff and other users of University IT services. It supports all the services offered by IT Services plus general IT support queries from any user, working in collaboration with local IT support units.


The Customer Services Group also offers a data back-up service; an online shop; and a PC maintenance scheme. Customer Services is further responsible for desktop computing services – for staff and in public/shared areas – throughout UAS and the Bodleian Libraries.

EndNote:

Designing citations and bibliographies


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Ready To Learn?






Today's session takes place in a video-call using *Teams*


You can turn on Live Captions

Don't plan to multi-task



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Today's resources




How will you display your workbook?

Where are your course files?

Is the software installed?





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Resources for your learning



Activities for you to practice today
In the course handbook
Work at your own pace!
Be selective

Video playlist with today's topics

Follow-up work
Continue with exercises after the session
Bookable Course Clinics later



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Course topics



Using output styles
Options for an individual citation
Editing an output style
Template as a pattern for citations

Behaviour of citations in text, footnotes and bibliography
Some useful features of output styles
Un-formatting (and why)

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Getting Started



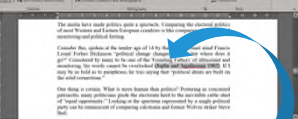
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Build a library of references

Output Styles

Revision: Citation formatting

Create your text ... insert citations
Choose an output style



The screenshot shows the Microsoft Word interface with the 'References' tab selected. The 'Citations & Bibliography Tools' task pane is open on the right side of the window. The 'Bibliography' section is active, displaying a list of citation styles. A blue arrow points to the task pane. The main document area shows a paragraph of text with a citation inserted: 'The author here made a point about a specific... (citing the second edition of most recent and latest European standards in this context...)'.

[illegible]

Options for an individual citation



Edit & Manage Citation(s)

Conceal author's name, year etc
Special format at start of sentence
Suffix, prefix

Options available depend on the output style
Some options do not work in footnote citations

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Editing an output style



Start with a nearly-suitable style
Tools|Output Style|“current style”

Save style with a new name and edit that
All styles are saved in one folder

Style Editor window
Categories are listed on left
Separate groups of settings for Citations, Bibliography
and Footnotes



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Editing the Citations template



Template is the pattern for the in-text citations

Choose **Citations|Templates**

Make changes

Add fields
Type text/punctuation
Format text
Set a multiple citation separator

Insert Field

Multiple citation separator:

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Designing citations and bibliographies



Learning Objectives One, Two and Three

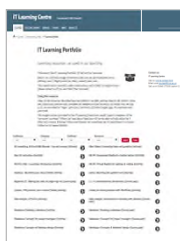
Finish at 2:40 please

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Find the resources for the workshop in our IT Learning Portfolio



Download the files (and more) from
the IT Learning Portfolio at
skills.it.ox.ac.uk/it-learning-portfolio



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More Template Editing

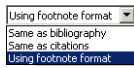


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Editing the Footnotes templates



Footnotes options:



Add a Reference Type

Add fields as required

Insert punctuation

Apply formats

Exclude footnote citations from the bibliography?

☐ Include citations in bibliography

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Repeated citations (in footnotes)



“Ibid.”

If reference is cited in consecutive footnotes

Set this using **Footnotes|Repeated citations**

A separate short form template for repeated citations

Short Title field

If used in template, must complete this field in the refs

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Page numbers



Pages field in the Library

Page numbers included in the reference

example: a portion of a book

In the Citation template, add **Pages** field

Cited pages field in a citation

Edit & Manage Citation(s)

Page number you give when editing an individual citation

But some styles do not display these ☹

In Citations or Footnote template, insert **Cited pages** field

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Designing citations and bibliographies



Learning Objectives Four, Five, Six and Seven

Finish at 3:20 please

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Useful Options in an Output Style



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Some useful features



Anonymous works ... Ambiguous citations ...
... Author Name format ... Author lists ...
Consecutive citations ... Journal name abbreviations
... Order within a multiple citation ...

Plenty more options:
Explore those that interest you

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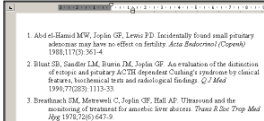
Bibliography options: set in the output style

Field Substitutions
Another field to use if **DOI** or **PMCID** field is empty

Bibliography|Title Capitalisation

Bibliography|Sort Order

Chapter bibliographies




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Removing Formatting from Citations





iT Centre Learning  

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Unformatting citations

 Update Citations and Bibliography

 Convert Citations and Bibliography

Unformatted citations {Carter, 2006 #59}
Bibliography disappears


- Smaller, more stable document
- Readable by other word-processors
- Can change to another format
- Safely rearrange paragraphs (copy & paste)

Re-apply output style before printing Chicago 16th A

Unformat/Reformat is a good way to repair a document

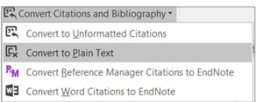
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Removing *EndNote's* field codes in a *Word* document



EndNote's citations are field codes


Can remove field codes



A new document is created, with citations in plain text

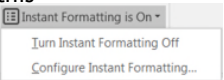
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Turning off “Instant Formatting”



EndNote scans document continually
May slow down your work



For a large document, disable this



Future citations will be unformatted

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More Help with Referencing

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Related courses

Referencing:

EndNote : Quick start
EndNote : Manage your research reading
using Windows or Mac

Documents:

Good practice in document design
Designing your thesis or book

Online videos on these and other topics

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Find the resources for the workshop in our IT Learning Portfolio

Download the files (and more) from
the IT Learning Portfolio at
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Designing citations and bibliographies

Learning Objectives Eight, Nine and Ten

Finish at 4pm please

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