

EndNote Exercise 3: Using Cite While You Write

EndNote integrates well with Microsoft Word, allowing you to insert references into the text of your Word document. In this exercise, you'll learn these skills:

- Select and insert citations into the text of your Word document
 - Create a list of references (bibliography) at the end of your paper
 - Edit citations, e.g., add page numbers, remove an author's name, etc.
 - Remove field codes in order to edit your bibliography
1. To start the exercise, make sure mylibrary is open in EndNote.
 2. Open a new document in Microsoft Word.
 3. You may still have Internet Explorer open on your computer from Exercise 1. If not, open Internet Explorer. Keep Word open.
 4. Within Internet Explorer, go to <http://www.gwu.edu/gelman/guides/endnote/education/sampleseduc.html> and scroll to the section for Exercise 3. From this web page, copy the following text:

A survey of teachers at a year round school in Virginia reported higher job satisfaction. In California, students and faculty at community colleges support a shift to year round schooling. Such a shift may be necessary to meet the needs of the state's growing population.

5. Paste the text into Word and save the document.

You'll now place a reference after each sentence in this paragraph.

Reference 1

1. Go to *EndNote* and select the *Haser 2003* reference. To select it, click just once on the reference. It should now be highlighted in blue.
2. Now to go *Word* and click at the end of the first sentence, between *satisfaction* and the period (.).
3. Within the *Word* menu bar, go to *Tools/EndNote/Insert Selected Citation*. After a few seconds, you should see the reference for *Haser 2003* appear in the text and the formatted citation appear at the end of the paragraph. If the formatted citation and reference do not appear automatically, don't worry; we'll fix that in the next section.

Formatting Your Citations and Bibliography

As you add citations to your text, you will need to specify which Output Style EndNote should apply. To do this, follow these steps:

1. Within *Word*, go to *Tools/EndNote/Format Bibliography*. This will open the *EndNote Format Bibliography* dialog box.
2. Make sure the *Format Bibliography* tab at the top of the box is selected.
3. In the *Format document* box, the name of your Word file should be visible.
4. In the *With Output Style* box, we want to specify APA 5th ERIC. Use the *Browse* button to display a list of all EndNote styles. At the top of the *EndNote Styles* box, click on *Name* to sort the list by name. Scroll until you see *APA 5th ERIC*. Select *APA 5th ERIC* and click *OK*.
5. This will take you back to the *EndNote Format Bibliography* dialog box. You should see *APA 5th ERIC* appear in the *With Output Style* box. Click *OK*.
6. You should now see your citation and bibliography formatted with this style. You may need to repeat these steps to format your bibliography as you add citations to your text.

Reference 2

For the next reference, we'll use EndNote's Search feature.

1. Go to *EndNote* and in the top menu bar select *References/Search References..*
2. In the first pull-down menu, select *Author*.
3. In the text box just below this menu, enter *Carley* and click *Search*.
4. You should now see a single reference for *Carley 2002* displayed in mylibrary. Single click on this reference to select it.
5. Go back to *Word* and click at the end of the 2nd sentence, between *schooling* and the period. From the *Word* tool bar select *Tools/EndNote/Inserted Selected Citation*.

Using Keywords in EndNote

You can search for references using any field in EndNote, and you can combine multiple keywords in your search—i.e., to find all the references in your library pertaining to both *job satisfaction* and *year round schools*.

That's why **Keywords** and **Abstract** are useful fields, especially when you have a lot of references in your EndNote library.

6. Again, you'll see the selected reference inserted into the text and the formatted citation appear at the end of the document. Notice that in the works cited at the bottom, the *Carley* reference is placed in alphabetical order before *Haser*.
7. If you don't see the new reference, repeat the steps to format your bibliography (*Tools/EndNote/Format bibliography*).

Reference 3

For the last reference, we'll use yet another way to select and insert a citation.

1. Go to *Word* and click at the end of the last sentence, just after *population*.
2. From the *Word* menu bar, select *Tools/EndNote/Find Citation(s)*.
3. In the *Search for:* box at the top of the page enter Educational Demand and click the *Search* button.
4. You should see a reference for *Guyer 1997* appear in the list. Select it and click the *Insert* button at the bottom right of the screen.

Again, you'll see the reference appear in the text and the citation appear at the end of the document. Note that the reference in the text includes all 3 authors of the document, as per APA 5th style.

Editing Citations – Using the Edit Citations Dialog Box

Some citations may need to differ from the standard format. For example, you may need to add page numbers, remove an author's name, or omit a date. The easiest way to do this is by using the *Edit Citation* tool within the EndNote toolbar in Word.

Follow the steps below to make edits to citations.

Exclude Author's Name

1. Within *Word*, edit the first sentence to read "A survey by Haser at a year round school in Virginia reported higher job satisfaction."
2. By mentioning Haser's name in the text, we do not need to repeat it in the citation. So, we'll remove the author's name from the citation.

3. Make sure your bibliography is formatted (See **Formatting Your Citations and Bibliography** at the beginning of this exercise).
4. Within *Word*, click on the citation within the text, i.e., (*Haser & Nasser, 2003*).
5. Within *Word*, select *Tools/EndNote/Edit Citations*. This will display the *Edit Citation* window. Make sure your selected citation is highlighted in the *Citations in document:* window.
6. Within the *Edit Citation* box, click *Exclude author*. Click *OK*.
7. Notice that the author's name has been removed from the citation. If the citation has been unformatted, elect *Tools/EndNote/Format Bibliography* to reformat it.

Add a suffix, including page numbers

Now, add a page number to the citation for *Guyer* at the end of the 3rd sentence.

1. Within *Word*, make sure your bibliography is formatted. Click on the *Guyer, Breedlove, & Kuhn, 1997* citation.
2. In *Word*, use *Tools/EndNote/Edit Citations* to open the *Edit Citations* dialog box.
3. Make sure the *Guyer* citation is highlighted.
4. In the *Suffix:* box, enter a space followed by p . 70. Be sure to use the *Suffix* box, rather than the *Pages* box. In order to use the *Pages* box, you would have to add a *Cited Pages* field to your citation and footnote templates. It's quicker and easier to use the *Suffix* box. Be sure you've put a space before p . 70
5. Click *OK*.
6. In *Word*, select *Tools/EndNote/Format Bibliography* and click *OK*. You should see "p.70" added to the *Guyer* citation in the 3rd sentence.

Add a prefix

Sometimes you'll need to add a prefix to an in-text citation. Using the steps outlined in the previous examples, add a prefix to the Carley citation so that it reads "(For example, Carley, 2002)." **Remember that when using the *Edit Citations* feature in *Word*, you need to include spaces in the Prefix and Suffix fields.**

Editing Citations and References – Deleting a Citation

1. Highlight the reference and open the *Edit Citation(s)* window, as above.

2. You'll notice that the panel on the left displays each of the citations in your document. The one you've selected should be highlighted in this panel.
3. Click *Remove* to delete the in-text citation. If this is the only instance of this reference in the document, it will remove the full citation from the bibliography at the end of the document as well.
4. Click *OK*.

Editing Citations and References – Removing Field Codes

For most cases, it's best to use the Edit Citations tool to edit citations. In some cases, however, the Edit Citations tool may not accommodate the change you need to make. Or, you may need to make minor changes to references during the final proof reading of your paper. In such cases, using EndNote's Remove Field Codes will allow you to make edits to your citations and bibliography from within Word.

1. Within *Word*, select *Tools/EndNote/Remove Field Codes*
2. A dialog box appears telling you that a copy of the document will open in a new window. Your original document, with field codes, will remain open and unmodified. Click *OK*.
3. Notice that within the version your Word document without field codes, it is possible to make edits within the citations and references. It was not possible to do this when the field codes were present.

Be very careful when you remove field codes! When you use this command, a new document is created that contains the formatted text created thus far by EndNote, but without any live links to the EndNote program. To add new references to this new document, you would need to do it manually. Make sure your original Word document (with field codes) is saved and safe.