

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

To start the exercise, make sure mylibrary is open in EndNote. Open Word and copy the paragraph under *Exercise 3* from http://www.gwu.edu/gelman/guides/endnote/political_science/samplespols.html into the blank Word document. Save the Word file as `PolsPara.doc`.

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

Reference 1

1. Go to *EndNote* and select the *Turner 2002* 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 *globe* and the period (.). Type a space after *globe*.
3. Within the *Word* menu bar, go to *Tools/EndNote/Insert Selected Citation(s)*. After a few seconds, you should see the reference for *Turner 2002* 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 (`PolsPara.doc`).

4. In the *With Output Style* box, we want to specify APA 5th rev. 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 rev*. Select *APA 5th rev* and click *OK*.
5. This will take you back to the *EndNote Format Bibliography* dialog box. You should see *APA 5th rev* 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 *Keyword*.
3. In the text box just below this menu, enter `Bioethics` and click *Search*.
4. Single click on the reference for *Burke 2002*.
5. Go back to *Word* and click at the end of the 2nd sentence, between *environment* and the period. Type a space after *environment*. From the *Word* tool bar select *Tools/EndNote/Insert Selected Citation(s)*.
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 the reference which has *Turner* as the first author, is placed in alphabetical order after the citation for *Burke*.
7. If you don't see the new reference, repeat the steps to format your bibliography (*Tools/EndNote/Format bibliography*).

Searching through EndNote References

As you keep adding references to the same EndNote library, you may find the EndNote search feature useful in locating the references you want to cite. Notice that you can search for a combination of terms (just as we did in the database PAIS International in Exercise 2): e.g., *Canada* and *stem cell research*.

That's why adding **keywords** to references is good practice for a larger EndNote library. If you make the effort to standardize your keywords, finding your references will be even easier.

Reference 3

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

1. Go to the PolPara Word document and click at the end of the last sentence, just after *community*. Type a space after *community*.
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 `Hollowell` and click the *Search* button.
4. You should see the reference appear in the window. Click on it, then click the *Insert* button at the bottom right of the screen.

Again, you'll see the reference is added to the text and to the reference list.

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 Turner reported that the media is filled with accounts of conflicts and emerging struggles across the globe."

2. By mentioning Turner'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., (*Turner 2002*).
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 Burke at the end of the 2nd sentence.

1. Within *Word*, make sure your bibliography is formatted. Click on the *Burke 2002* citation.
2. In *Word*, use *Tools/EndNote/Edit Citations* to open the *Edit Citations* dialog box.
3. Make sure the *Burke* citation is highlighted.
4. In the *Suffix:* box, enter a comma then a space followed by p . 41. 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 the comma and a space before p . 41
5. Click *OK*.
6. If you don't see p.41 added to the Burke citation, then in *Word*, select *Tools/EndNote/Format Bibliography* and click *OK*. You should see "p.41" added to the citation in the 3rd sentence.

Add a prefix

Within *Word*, edit the 4th sentence to read "Individual actions make a difference with regard to sustaining the planet's resources and the human community."

Using the steps outlined in the previous examples, add a prefix to the citation so that it reads “(For example, Hollowell 2004).”

Editing Citations and References – Removing 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 of PolPara 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! Once the field codes are removed, a new Word document is created that contains only the text formatted thus far by EndNote, and NO live links to the EndNote program. Any new references you want to add to this new document would have to be typed into Word manually. Make sure your original Word document (with field codes) is saved and safe.