

# Editing Styles and Using Terms Lists in EndNote 12

A University of Michigan Library Instructional Technology Workshop

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## Table of Contents

<b>Introduction .....</b>	<b>2</b>
<b>Modifying EndNote Styles.....</b>	<b>2</b>
Global Style Settings .....	3
Templates .....	3
Rules that Govern Styles.....	4
Special Formatting Characters .....	5
Author Lists .....	5
Author Name.....	6
Layout .....	6
Sort Order .....	7
Title Capitalization .....	7
Adding a Call Number to a Style .....	7
<b>Using Term Lists .....</b>	<b>8</b>
Opening and Editing Term Lists .....	8
Journal Abbreviations.....	9

**For our basic handout on using EndNote, please visit**  
**<http://www.lib.umich.edu/exploratory/pdfs/endnote12.pdf>**

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## INTRODUCTION

The term “**style**” (or “output style”) is used to describe a particular method of documenting your work. Each style has format settings for the in-text citation, the bibliography, and citations in footnotes. Each style has a template for the in-text citation, the bibliography, and citations in footnotes that include what fields should display (and how they are formatted) as well as what punctuation should be used. There are also settings for how authors, journals and page numbers are displayed in addition to options for sorting authors, title capitalization, etc.

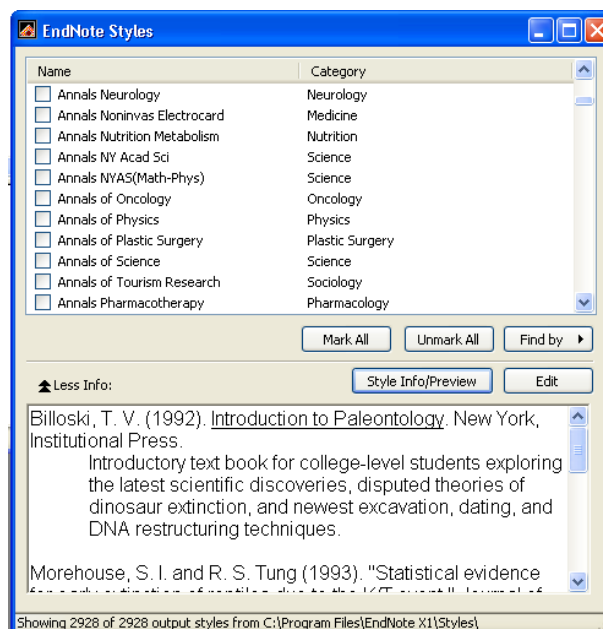
While there are many styles included with EndNote (and more you can download from their website), it may be necessary to modify a style to make it fit your exact bibliographic needs. EndNote allows you to change punctuation, formatting, and even the included fields. However, to modify *correctly*, you have to be aware of the **rules that govern styles** and the **special formatting characters** used in the style template.

## MODIFYING ENDNOTE STYLES

To edit a style, go to the **Edit** menu, choose **Output Styles** and select **Open Style Manager...**

1. In the EndNote Styles dialog box, select the style you wish to edit by clicking on it once. If you want to see what the style looks like, click the *More Info* button, and then click on the *Style Info/Preview* button.
2. Once you have found and selected the style to edit, click the *Edit* button. Once the Style window is open, we suggest you **Save As...** (from the **File** menu) and rename your new style to keep the original style intact.

Some options in the editing dialog box, such as *Page Numbers* and *Journal Names*, apply globally to all four sections (*Citations*, *Bibliography*, *Footnotes*, and *Figures & Tables*). Other options only apply in their individual sections –for example, *Templates* appears under each heading (*Citations*, *Bibliography*, etc.). You must be sure you’re in the correct section when making changes.



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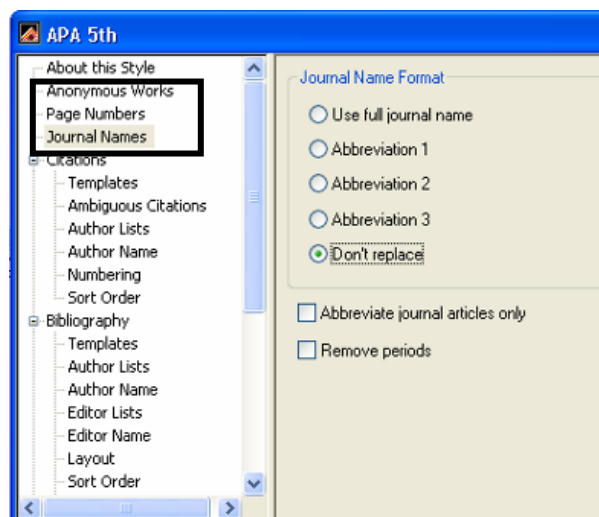
## GLOBAL STYLE SETTINGS

These settings affect citations, bibliographies, citations in footnotes, and figures & tables, so you only select an option once.

**Anonymous Works:** Choose how you would like to display works where the author field is blank. Options include *Leave Author Blank*, *Use Full Title*, *Short Title in Place of Author*, *Use APA Specifications*, and *Insert Text* (e.g.: Anonymous).

**Page Numbers:** Specify how the page numbers should be formatted in references.

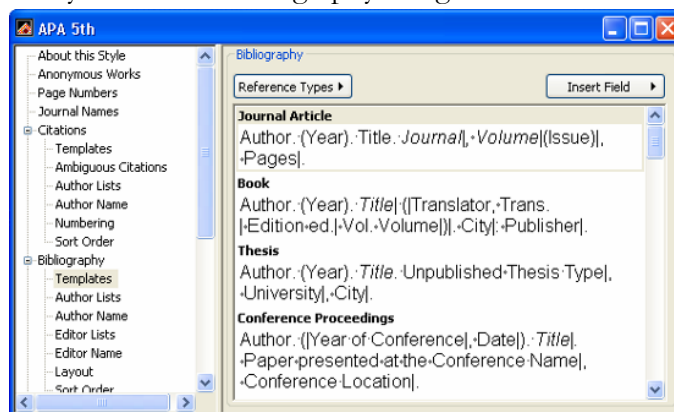
**Journal Names:** Specify which journal abbreviation format to use from your Journal Term Lists. Don't forget to select the *Abbreviate Journal Articles Only* and *Remove Periods* options, if so desired. When using abbreviations, be sure you've added them to your Journal Term List (see the Journal Abbreviations section on page 2).



## TEMPLATES

Templates control a large part of the style's look and function. They include field names and punctuation commands telling EndNote how to format different references for that particular style. Templates show you a sample of what a citation (or bibliography reference) will look like, only with field names in place of actual data. When you create a bibliography using the **Format Bibliography** command, EndNote replaces the field names with your data.

You can modify any style – add or delete fields, change formatting such as italics or bold, or change the punctuation – just by making the change in the correct template (*Citations*, *Bibliography* or *Footnotes*). Within the specific section, you must also be sure to edit the right reference type, such as *Journal Article* or *Book*. This is particularly important for the *Bibliography* section.



To add a field, put your cursor where you want the field to appear and select the appropriate option from the *Insert Field* pulldown menu. Be sure to include any spaces and/or punctuation required.

To delete a field, highlight the field name from the appropriate *Reference Type* and delete it (again, be sure to fix any spacing and/or punctuation).

Before you start changing templates, however, you should be aware of the rules that govern how styles work.

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## RULES THAT GOVERN STYLES

There are four basic rules of dependence that govern how text, spaces, and field names interact with each other when they are used in a style template:

1. **Basic dependence:** Any text or punctuation that is not separated from a field name by an ordinary space is dependent upon that adjacent field, i.e., text or punctuation adjacent to a field only appears in your bibliography if the adjacent field contains data.  
Example: In the excerpt “Volume (Issue)”, the parentheses around “Issue” only appear in a formatted reference if there is an issue number for the reference.
2. The **preceding field takes priority** over the following field: When punctuation appears between two fields with no intervening spaces, it is dependent on the preceding field.  
Example: In the excerpt “Volume:Issue”, the colon is dependent on the volume field. So, if there is no volume in the reference, the colon will not appear.
3. The **first space after a field is dependent** on that field. Additional spaces are independent: The first ordinary space following a field is always dependent on that field. Any consecutive spaces after that are independent and will always appear in the formatted references.  
Example: In the excerpt “Author. Title”, the space is dependent on the author field so the title will not be preceded by a space if there is no author. However, in the excerpt “Author. Title” with two spaces between the author and the title, the title will be preceded by one space if there is no author.
4. **Independent text always appears** in the bibliography. Any text or punctuation that is not dependent on a field name always appears in the formatted references.  
Example: In the excerpt “Edition ed.”, the text “ed.” will appear in all references regardless of whether or not there is an edition for that reference.

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## SPECIAL FORMATTING CHARACTERS

To add flexibility and precision to the grouping of fields and punctuation in the style templates, the above rules can be circumvented in specific situations using the following special formatting characters:

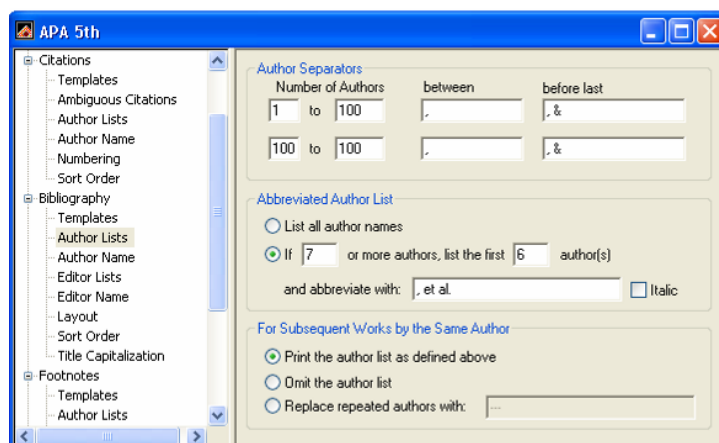
Formatting Character	Function	Example
Non-breaking space (◆) [ <i>Ctrl+Alt+Spacebar</i> (PC) or <i>Option+Spacebar</i> (Mac)]	Links adjacent text or punctuation to a field.	In the excerpt “Edition ◆ ed.”, the text “ed.” will only appear in references where there is an edition.
Vertical bar ( )	Forces separation of text or punctuation that is normally dependent on a field.	In the excerpt “Volume  :Issue”, the colon is now dependent on the issue field. So, if there is no issue in the reference, the colon will not appear.
Back apostrophe (‘)	Identifies text that should not be interpreted as a field name.	In the excerpt “Editor, ◆ `Editor`”, the second “Editor” is interpreted as just text and not as a field name.
Caret (^)	Separates singular and plural versions of terms that appear in conjunction with <i>Author</i> , <i>Editor</i> , or <i>Pages</i> fields.	In the excerpt “p. ^pp. ◆ Pages”, “p.” will precede a single page, while “pp.” will precede multiple pages.

You can also insert the non-breaking space, vertical bar, caret, tab character (→), and paragraph mark (¶) from the *Insert Field* pulldown list by choosing *Link Adjacent Text*, *Forced Separation*, *Singular/Plural*, *Tab* and *End Of Paragraph*, respectively.

## AUTHOR LISTS

Use this section to specify how the authors and editors (with the *Editor List*) will appear in the formatted bibliography or the in-text citations (be sure you select *Author Lists* or *Editor Lists* from the correct section).

In the *Separators* area, enter any punctuation and spaces that will separate the individual authors. Don't forget to use a different *Before last* separator and define separators depending on the *Number of Authors*, if so desired.



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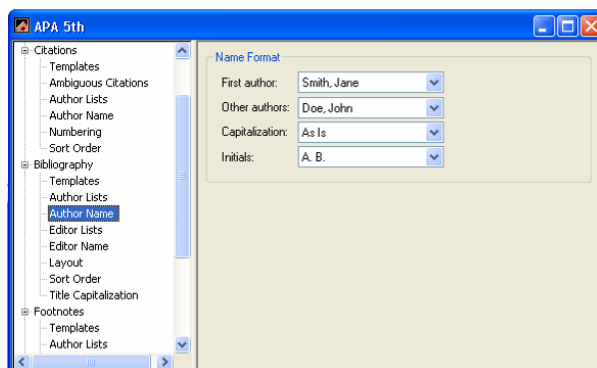
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In the *Abbreviations* area of the *Author Lists*, choose whether you want to abbreviate the list of authors after a certain number, using *et al.* or an equivalent. Make sure to specify the number of authors needed to trigger this abbreviation, how many authors to include in the formatted reference, what the abbreviation should be, and whether it should be italicized. For in-text citations, make sure to specify different abbreviations for the *First Appearance* and *Thereafter*, if so desired. These options can be found under *Author Lists* in the *Citations* section.

In the *For Subsequent Works by the Same Author* area, choose how author names will appear after the first entry. Author names can be kept, omitted, or replaced for subsequent entries.

## AUTHOR NAME

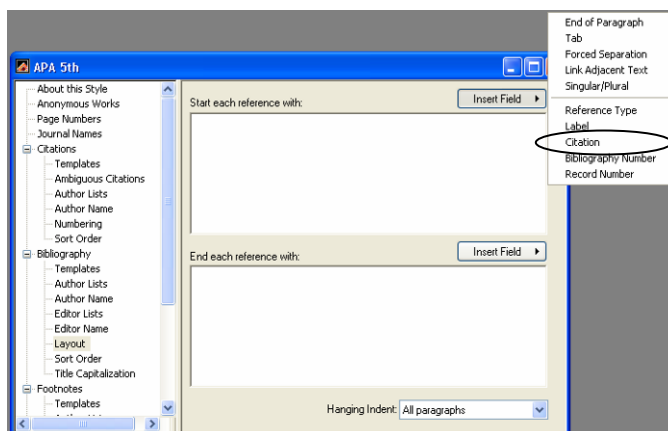
In the *Name Format* area, specify how author names should look, i.e., whether the first or last name should come first or whether there should be a comma after the last name. Make sure to specify a different name order for the *First Author* and *Other Authors*, if so desired. Also specify the format for *Capitalization* and first and middle *Initials*.



## LAYOUT

Use this section to specify what information, if any, should appear before and after each reference in a bibliography. This section also allows you to apply hanging indents to references.

- **A common reference prefix** is the bibliography number, which is used by all numbered styles to differentiate references in a bibliography. Tabs are often entered after the bibliography number to align the start of each reference. Other commonly used reference prefixes (reference type, label, citation, and record number) appear in the lower half of the *Insert Field* pulldown list.
- **A common use for the reference suffix** is to add a blank line between references by inserting a paragraph mark. Other commonly used reference suffixes (label, keywords, abstract, notes and record number) appear in the lower half of the *Insert Field* pulldown list.
- **When a hanging indent is used**, it indents the second and subsequent lines of each reference in a bibliography. It is often used in conjunction with a tab to align the start of each reference with subsequent lines when a bibliography number is included. Hanging indent options include *None* and *All paragraphs* for references with one or more paragraphs as well as *First paragraph only*, *Second paragraph only* and *All paragraphs but the first* for references with more than one paragraphs.



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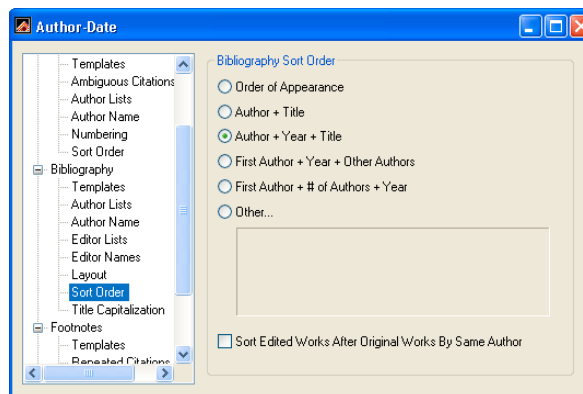
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## SORT ORDER

You can determine sort order for bibliographic references at the end of your paper and for multiple citations in the text. For references in the bibliography, the options are as shown on the right. Additional options for in-text citations are *Same As Bibliography*, *Year + Author*, and *Don't Sort*.



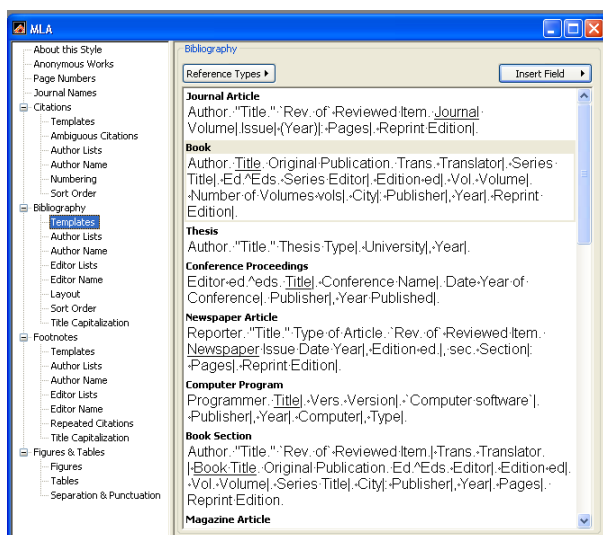
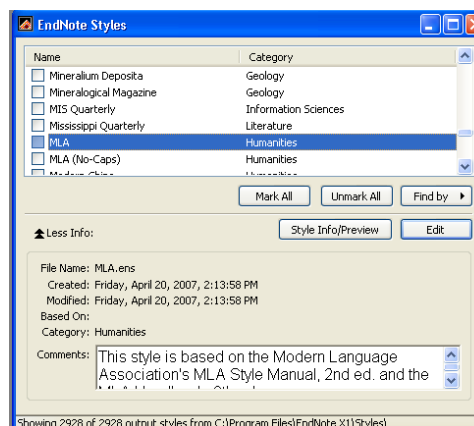
## TITLE CAPITALIZATION

You can also specify the capitalization format for titles in your bibliographic references. The options are *Leave title as entered*, *Headline style capitalization* (i.e. the first line of every significant word is capitalized, excluding articles and prepositions), and *Sentence style capitalization* (i.e. only the title's first letter is capitalized).

## ADDING A CALL NUMBER TO A STYLE

To add a call number to a bibliographic style, go to the **Edit** menu, select **Output Styles**, then select **Open Style Manager....**

1. In the EndNote Styles dialog box, scroll to the style you would like to edit and highlight it by clicking on it once.
2. Click the *Edit* button.
3. Remember to go to the **File** menu and choose **Save As...** to save your edited style as a copy so the original style remains intact.
4. In the dialog box that opens, click on *Templates* under the *Bibliography* heading (in the left pane).



5. The reference types for that style will appear in the right pane with all of its templates. Within the *Book* reference type, place your cursor in the spot where you would like to add the Call Number and click *Insert Field*.
6. In the list that appears, select *Call Number*.
7. Once the *Call Number* field is added to the citation types of your choice, save the style, close the dialog box, and close the Style Manager.
8. You'll need to make sure you format the bibliography for your document using this new style.

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## USING TERM LISTS

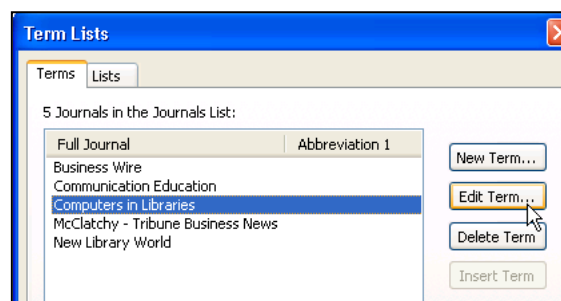
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EndNote **term lists** are used to store terms (keywords, authors, journal names etc.) within each library. Term lists facilitate data entry and improve consistency and accuracy. The *update list during data entry* preference, by default, is enabled. This means that text added to certain fields will be automatically added to the term list. As you begin to enter text into one of these fields, EndNote will suggest the closest matching term; continue typing until the correct term appears. Press *Enter* to accept it and create another line or *Tab* to accept it and move to the next field (continue typing if it is not the correct term). If you enter a new term into one of these fields, the term appears in red text to alert you that you have entered a new term. When you close the reference that new term is automatically added to the list

## OPENING AND EDITING TERM LISTS

The following focuses on the Journals Term list but the same principles apply for any of the terms lists. To open a terms list,

1. Go to the **Tools** menu, choose **Open Term List** then choose the list you'd like to open.
2. To edit a journal (or any term) in the list, select it from the Term List dialog box, be sure you're in the *Terms* tab and choose *Edit Term...*
3. Change the term as necessary and click *OK* when finished.



You can also manually add a journal (or any term) to the list by clicking on the *New Term...* in the *Terms* tab of the Term List dialog box. Enter the journal name and its abbreviation(s) and click *OK* to add it to the list and dismiss the New Term dialog box. Clicking *Save Journal* (or *Save Term* for the other lists) adds the journal to the list, but keeps the window open for you to enter another journal.

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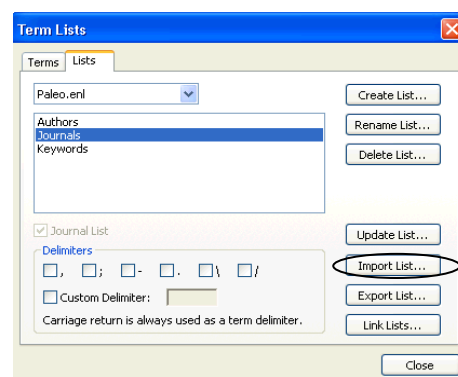
## JOURNAL ABBREVIATIONS

If you add the journal's abbreviated title in the *Alternate Journal* field as you enter the reference (or as it is imported), the abbreviation will be automatically added to the *Abbreviations 1:* field of that journal in the Journal Term list.

However, most sources from which you'll import citations don't have the journal abbreviations in the record. If you need to use journal abbreviations, EndNote comes with 12 journal term lists, including those accepted by the National Library of Medicine (NLM), the American Chemical Society (ACS), and the Modern Language Association (MLA). Other term lists include Anthropology, Law, and BioScience. Depending on your discipline, you may add as many lists as you wish.

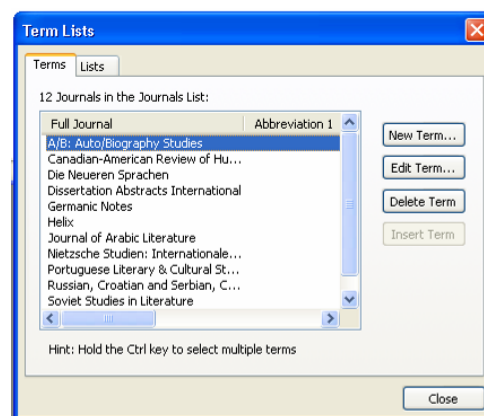
1. Go to the **Tools** menu and choose **Define Term Lists**.
2. Click on the *Lists* tab, choose *Journals* from the list, and then click on *Import List...*
3. Browse to the Terms folder in the EndNote application folder, then choose the appropriate list and click *Open*. The list will be imported to the selected EndNote library.

Remember, each EndNote library has its own term lists.



To add an abbreviation at a later date, go to the **Tools** menu, choose **Open Term List** then choose the **Journals Term List**.

1. Choose the correct journal, be sure you're in the *Terms* tab and choose *Edit Term...*
2. Add the abbreviation in the *Abbreviation 1:* field and click *OK* to close the dialog box.
3. If the style you have selected uses the abbreviation, the appropriate abbreviation will appear for all articles from this journal, whether or not the individuals reference has anything in the alternate journal field.



Remember, some styles are not set to use the abbreviation instead of the full journal title, so you may need to adjust the style (see the previous section on styles).

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