

# Creating EndNote Styles

## 1 Instructions to Authors

The place to start is by looking up the instructions to authors at the journal's web site or in the reference instructions section of the style manual you are using. You may also need to consult sections on in-text citations, footnote styles, illustrations, and tables.

Below are the sections regarding references from one online set of instructions to authors. They are presented in the order they appeared in the original instructions, although intervening text has been removed for the sake of brevity. These will be used in the class to create a style.

### 1.1 Figures

Figures should be numbered consecutively using Arabic numerals (Fig. 1, 2, *etc.*), in order of their mention in the text. A fully descriptive caption should be provided for every figure and the complete list of captions typed together on a separate page.

### 1.2 Tables

These should be numbered in Roman numerals (Table I, II, *etc.*), in the order of their mention in the text. A brief title should be typed directly above each table, not on a separate page. Footnotes to tables should be indicated by superscripts and typed at the bottom of the tables.

### 1.3 References

The list of references should be arranged alphabetically according to the surname of the first author and set out as follows:

d'Amber, C. & de Chaos, M. (1990). The dragons of Kolvir: Shadow and substance. *Dragons Today* **13**, 7-11.

Grayhame, G. (1978). Territorial behaviour of male noble dragonets (*Draconis noblis*). *Journal of the Draconic Guild of the Realm of Faerie* **58**, 731-734.

Magnus, A. G. (1959). The nature and physiology of the pituitary hormones of dragons. In *The endocrine system in dragons* (Faust, E., editor), pp. 404-422. Amber: Unicorn Press.

Ambrosius, M., *et al.* (1023). Nesting behavior of the northern ice dragon. *Dragon Behavior*. doi: 10.002/db.1022.003.

The order in the list should be:

**Single authors.** Where more than one reference is given for a single author the publications should be listed chronologically.

**Two authors.** These should be arranged first alphabetically, then chronologically. For in-text citations, use the names of both authors and the year. Do not use *et al.* for two-author references.

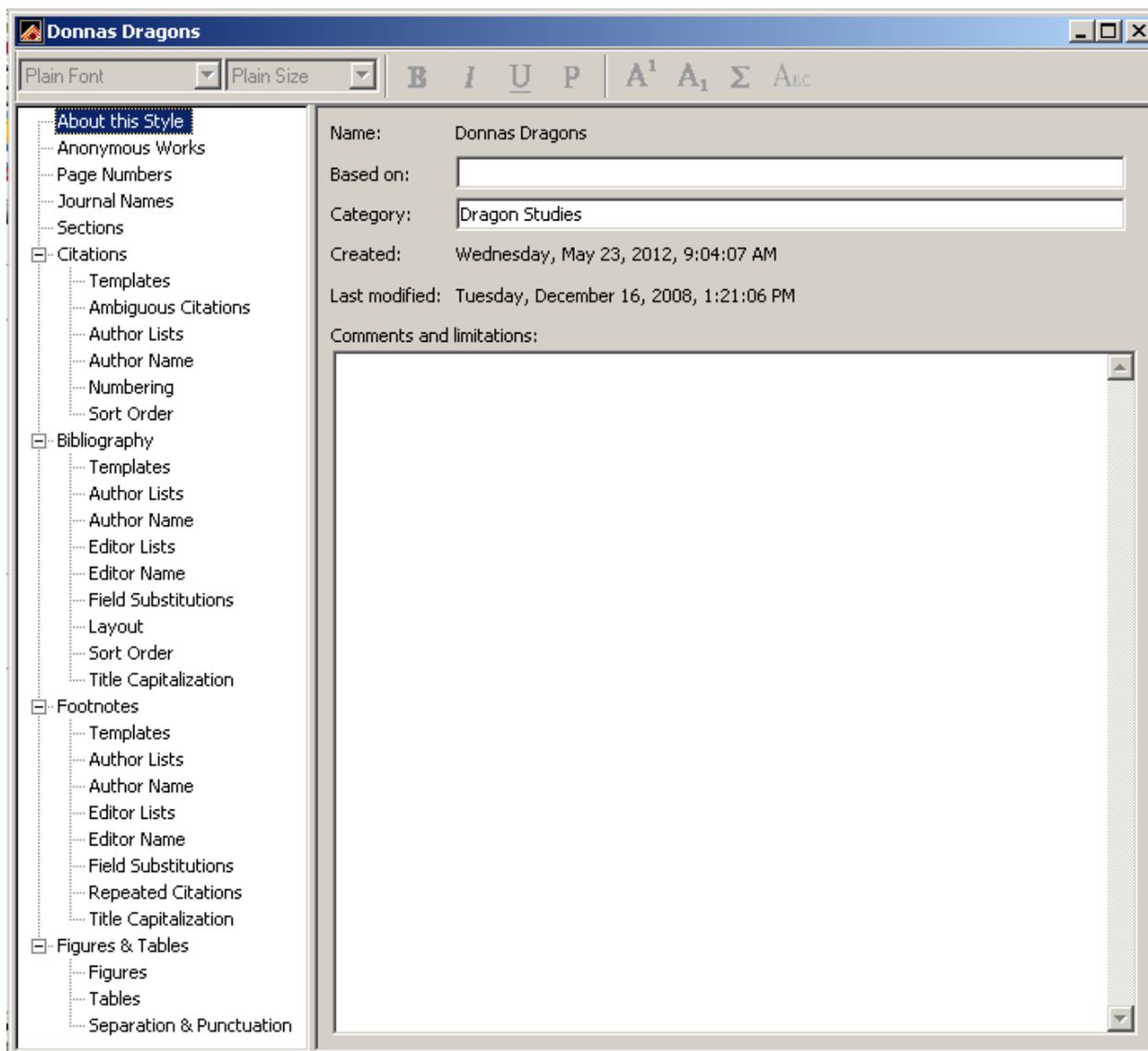
**Three or more authors.** These should be arranged chronologically. For all text citations use the surname of the first author only, followed by *et al.* and the date.

## 1.4 Instructions to Authors: Citations

If more than one reference by the same author(s) published in the same year is cited, use *a, b, etc.* after the year in both text and list, *e.g.* (1963*a*). Text citations can be given in either of two ways: (a) with date in parentheses, ‘as demonstrated by Jones (1956)’; (b) with names and date in parentheses, ‘according to recent findings (Jones, 1956)’. **Where more than one reference is cited in the text these should be in chronological order, *e.g.* Smith, 1975; Arnold, 1981; Jones, 1988. Journal titles should be given in full.** The full title of the paper, the volume number and the page numbers should be given.

## 2 Creating an EndNote Style

To create a new style from scratch, select *Output Styles>New Style* from EndNote’s *Edit* menu. You will see a window like the one below. The different sections and subsections in the style will contain information about the style and control how EndNote will format citations, bibliographies, footnotes, and graphics when this style is used. Each section of the style must be set up to match the instructions to authors for the selected journal.

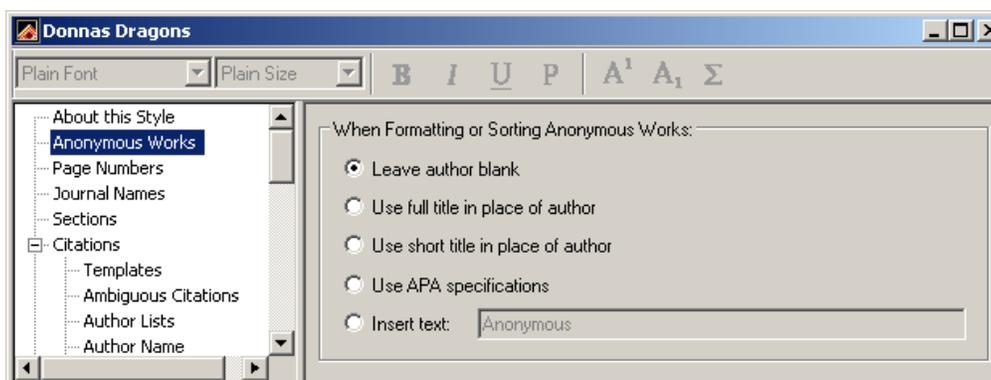


It is a good idea to immediately save this style with a new name, and then to save it frequently while you are working on it. If you do this you can close the style if you need to take a break for a while. EndNote X2 or later will automatically save new and edited styles in your *My Documents\EndNote\Styles* folder. If you are editing styles that already exist, be sure to give the edited version a new name so that you can tell it apart from the original in the main styles folder because both will appear in your list of available styles.

## 2.1 About this Style

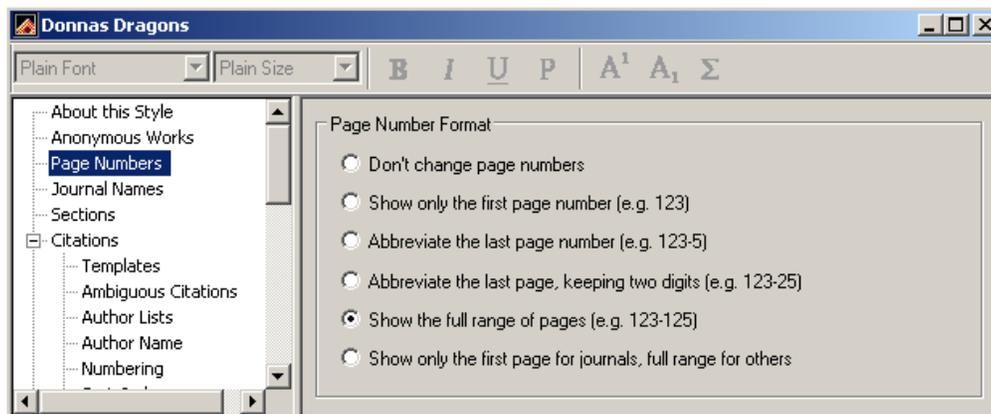
Here you can record information about the style, such as if it is based upon a style manual, and which scientific discipline, or category, it is for. In the comments and limitations section you can record any special comments you have about the style, and also any limitations in EndNote that may prevent the program from being able to match perfectly the requirements of the style manual or instructions to authors. Although EndNote can match very complex style requirements, it cannot match all style requirements for all journals. For example, in the instructions used in this example, EndNote cannot sort works with two authors alphabetically, but three authors or more chronologically in the bibliography. Only one sort order can be applied, and this would be a good place to explain that to the user.

## 2.2 Anonymous Works



In this section you can set preferences for how citations and bibliography will be formatted and sorted if there is no author for a record. If the instructions to authors provide no information on how to handle anonymous works, check example bibliographies in the journal if you have a copy of it, or contact the publisher for information. In this case I have no information on how this journal wants anonymous authors treated, so I am going to leave the author blank. Nothing will be substituted for the author's name and references with no author will precede reference with authors when sorted.

## 2.3 Page Numbers



Different journals and style manuals have different requirements for how page numbers should be displayed in the bibliography. Some may require the full range of pages while others require only the digits that are different. EndNote has the ability to change the way the page numbers are displayed in the bibliography from the way they are entered, and the settings for doing so are in this section.

In examining the references included in the instructions for our example, the full range of page numbers is shown, so page range “731-734” shows all of the digits. However, because different online databases and different journals present their page ranges in different ways, it is possible to have this page range in your EndNote library show as any of the combinations below.

- 731-734
- 731-34
- 731-4

If we leave the setting at the default, *Don't change page numbers*, the bibliography will be correct only if the full range of pages is entered in the library. To have it show the full range of pages when any of the options above are entered in the library, select the **Show the full range of pages** option in this section.

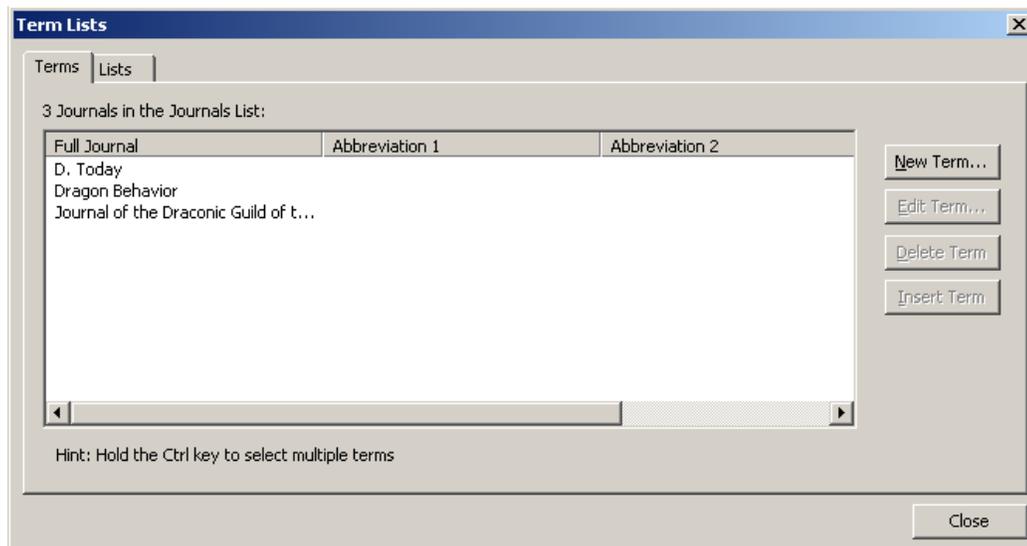
## 2.4 Journal Names

Much like some journals require the full range of pages while others an abbreviated version, some journals require the journal's name be spelled out in full while others require a standardized abbreviation, or vice versa. Some disciplines may even have multiple versions of the standardized abbreviation, such as one with periods after abbreviated words and one without periods. EndNote can substitute one version of a journal's name for another if you have set up a journals term list of the full name and standardized abbreviations. So the first step in setting your journal names preference actually begins in setting up a journals term list for your EndNote library.

[Note: There is a video on our training page at [www.endnote.com/training](http://www.endnote.com/training) called *Journal Names* that covers creating a journals term list and editing just the journal name section of the style to do this.]

## 2.4.1 The Journals Term List

In EndNote, select **Open Term Lists > Journals Term List** from the **Tools** menu. Resize the window so that you can see all the abbreviation columns as in the example below.



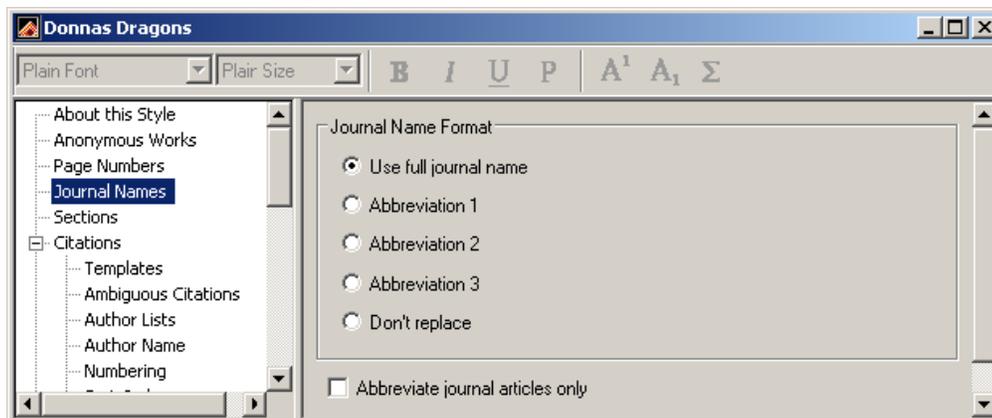
As references are entered into EndNote the contents of the Journal field are added to the Full Journal column in the term list while the contents of the Alternate Journal field are added to the Abbreviation 1 column. If there is only one version of the standardized abbreviation and the full journal, everything you need in this table will be filled in so long as each record entered in the EndNote library contains the full journal name in the Journal field and the standardized abbreviation in the Alternate Journal field. In reality, this is seldom the case. However, it is possible to manually enter the information in the term list, or better yet to import a list of the full names and abbreviation(s) from a tab-delimited file if you have one.

EndNote ships with several predefined tab-delimited files containing full names and standardized abbreviations, including those for the humanities, chemistry, law, the biosciences, and medicine. These lists can be imported into EndNote to create a comprehensive list of journals. To do this—

- Open the Journals term list.
- If there are journals already present, delete them by selecting all the journals present, then selecting the **Delete Term** button. This will ensure that you have no “orphan” journals without complete information or with abbreviations in the Full Journal column.
- Select the **Lists** tab.
- Select **Import List**.
- Locate and double-click on the tab-delimited file you wish to import. The predefined lists that ship with EndNote will be found in the Terms Lists folder within the EndNote folder. The complete list will be imported.
- Make note of the column for the abbreviation or full name that your new style requires.

Close the Term Lists dialog. You can now set the style to use the correct version of the journal name from the journals term list you created.

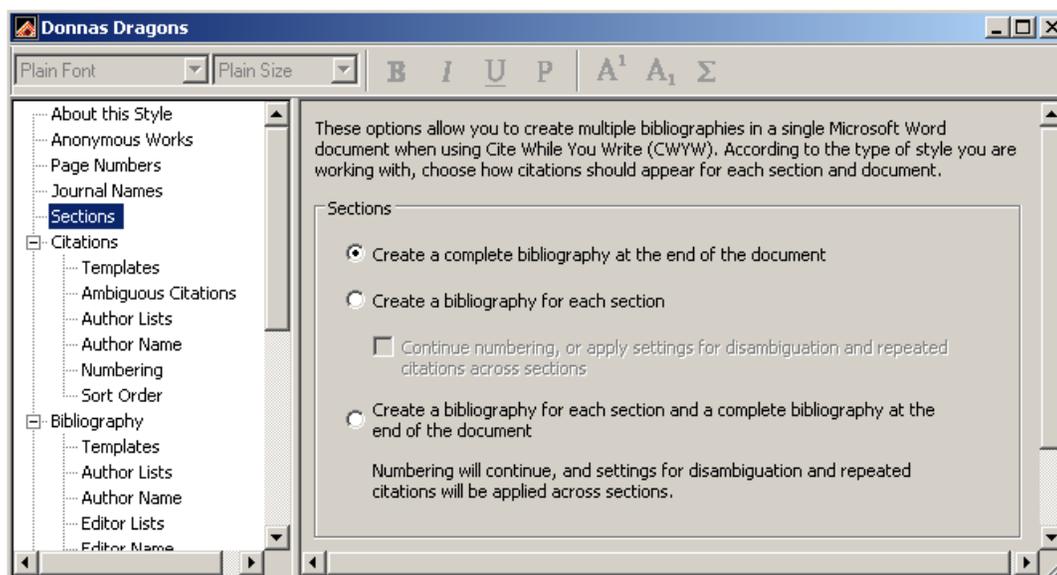
## 2.4.2 Journal Names in the Style



In the default journal name settings the style will usually be set to *Don't replace*. Change that to the option needed for your style. The instructions to authors for this style show full versions of the journals' names, so ***Use full journal name*** is the option to choose for this style.

When EndNote formats the bibliography using this style it will compare every record in the bibliography to every entry in the journals term list. If it finds a match in any of the columns it will then substitute the full journal name for the contents of the record's Journal field in the formatted bibliography.

## 2.4.3 Sections



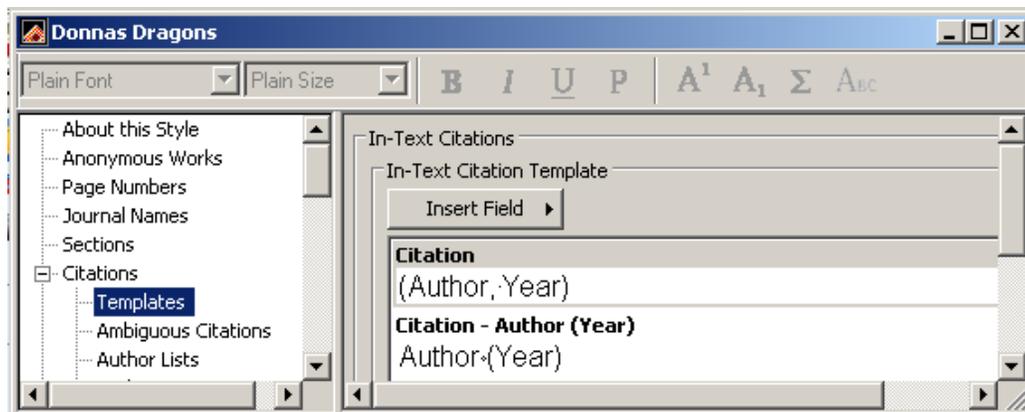
If you require a separate bibliography at the end of each section of a Word document, or at the end of each section and at the end of the entire document, you can set that option here. Please note that this will create a separate bibliography for each section break in Microsoft Word, even if they are on the same page (continuous) or inserted just to change a page from portrait to landscape mode.

This feature is only available when using Cite While You Write with Microsoft Word.

## 2.5 Citations

The citations section controls how in-text citations will be formatted. Here you can select the fields that will be included as well as how those fields will be displayed.

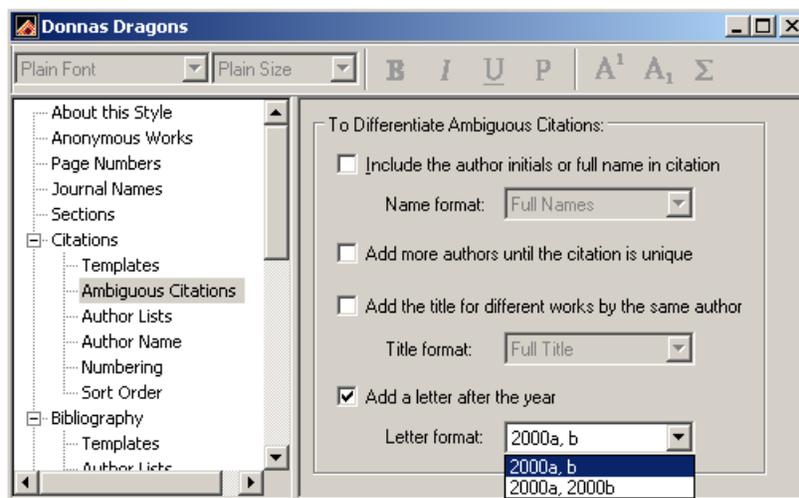
### 2.5.1 Templates



The citation template controls the fields that will be present, as well as the punctuation. There is a menu of fields and special codes that can be inserted into the template via the Insert Field button, as shown above. Our sample instructions to authors indicate that this is an author-date citation format, so I have inserted the Author and Year fields within a set of parentheses in my template for the default option, and the author's name outside the parentheses for that option.

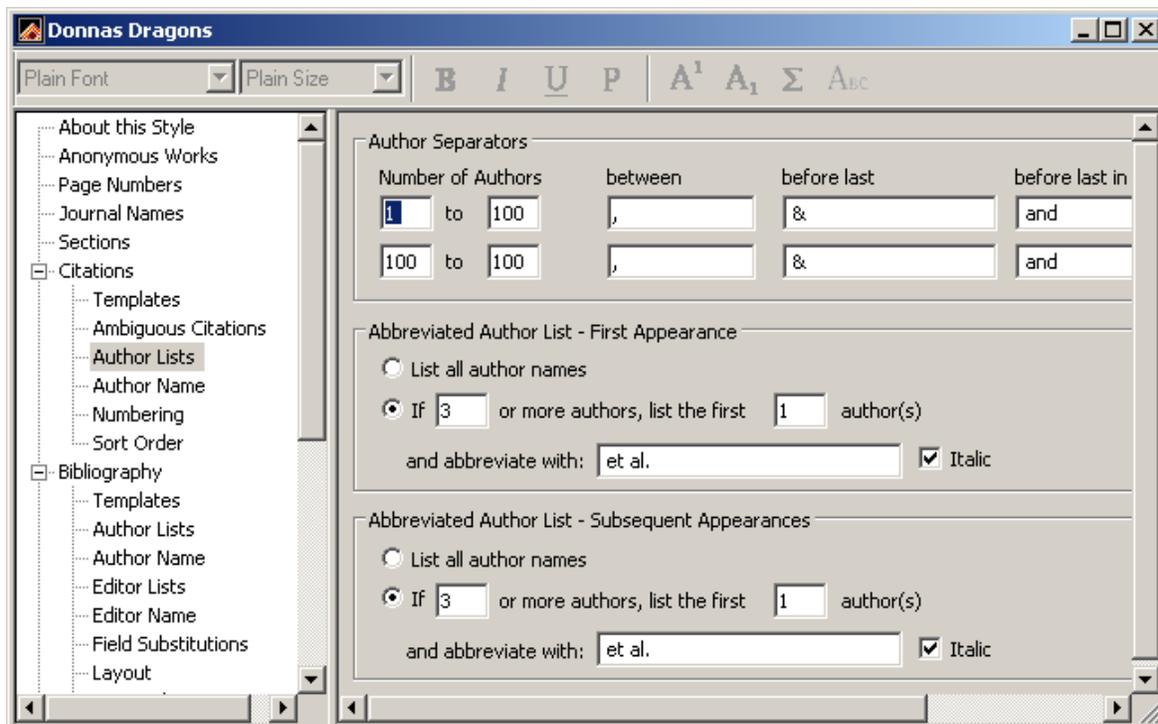
If the journal style uses numbers instead of authors and dates, you would use the Bibliography Number option from the Insert Field menu, then apply any formatting to it such as superscripting or surrounding it with parentheses.

### 2.5.2 Ambiguous Citations



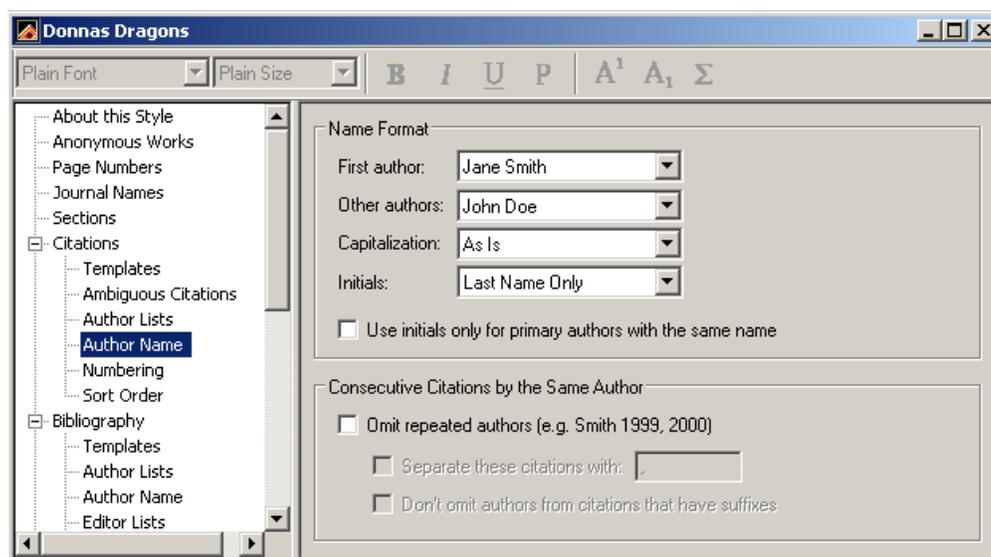
When using an author-date format it is often possible to have two references with the same author and year. These are called “ambiguous citations” and this dialog allows you to select how you want these handled. The sample instructions to authors require that a letter be appended to the year in this case, but it does not tell you which of the two formats shown above (2000a,b or 2000a, 2000b) you should use when there is more than one such entry in a citation. This is another example of a situation where you may need to find a copy of the journal to see which method of the two is actually preferred.

## 2.5.3 Author Lists



The Author Lists option allows you to control how many author names will appear in the citation, with the option of having the first appearance different than subsequent appearances of the same citation. Our author instructions say that if there are three or more authors only one of them should be shown, then “, et al.” The example above shows the setting for this option matching the instructions to authors. The ampersands between authors are used based on the sample references given.

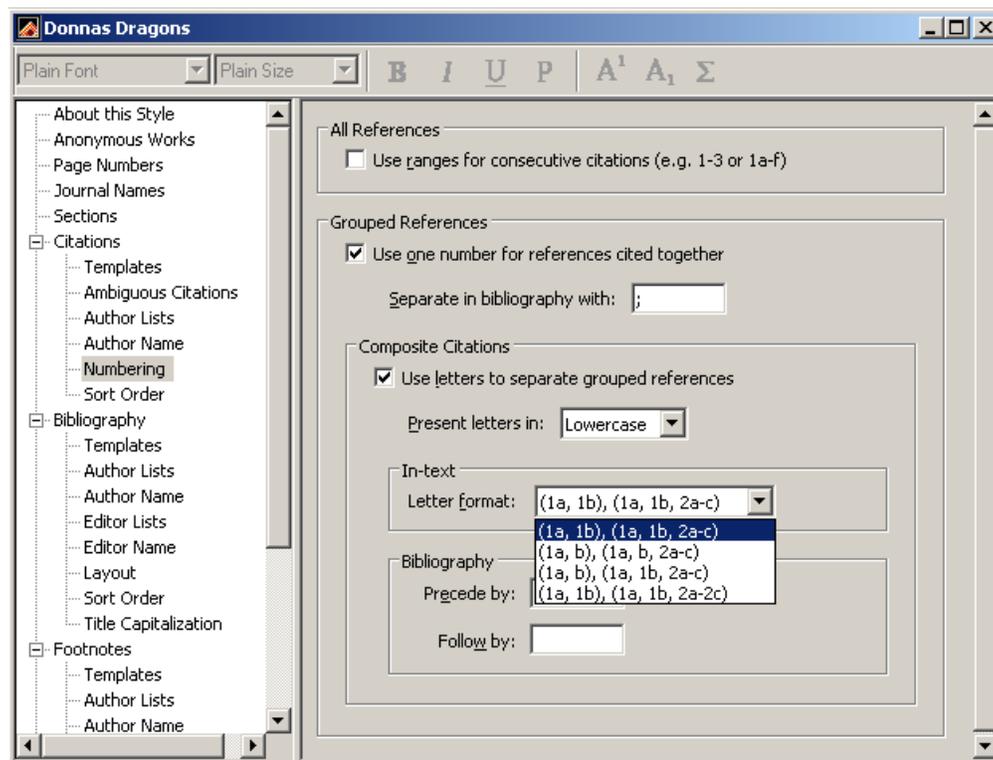
## 2.5.4 Author Name



The Author Name section controls how the authors' names will appear within the formatted citation. The default here is the appropriate choice for most in-text citations—Last Name Only. Note that there is an option to use initials for authors with the same last name, which can reduce confusion if there are

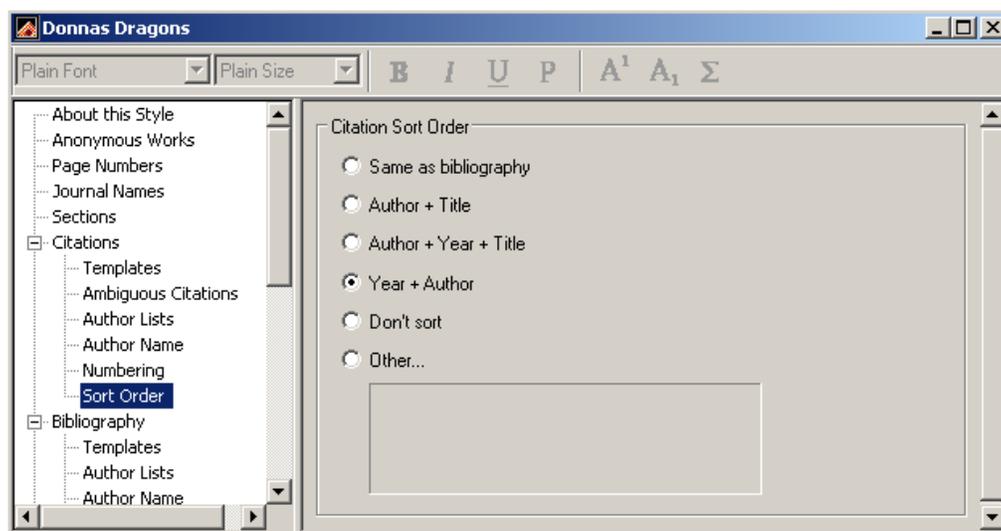
multiple authors with the same last name. There is also an option to omit the author's name if it is repeated in a consecutive citation.

## 2.5.5 Numbering



If you are using a numbered style you can set options for how number ranges will be handled here. One of the new features in EndNote X3 is composite citations, the ability to group citations to meet the requirements of many chemistry journals.

## 2.5.6 Sort Order



The Sort Order screen allows you to set the sorting order that will be used within grouped citations. The instructions to author say that where more than one reference is cited in the text, they should be in chronological order, so I have selected the Year + Author option shown above.

## 2.6 Bibliography

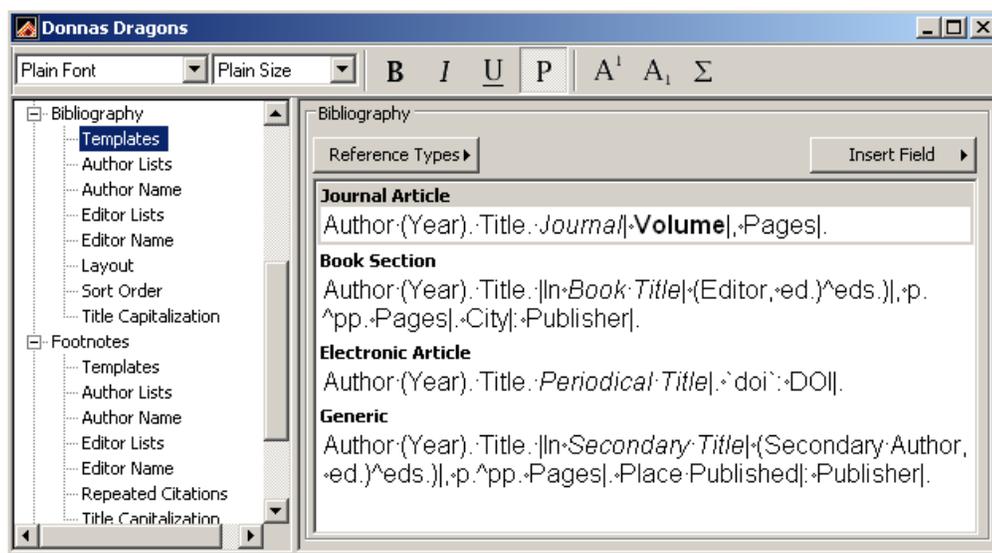
This section of the style controls most of how the bibliography will be formatted. There are some options that are controlled from the Format Bibliography command in Word, such as line and indentation spacing, and some options that are controlled by Word alone.

### 2.6.1 Templates

The bibliography template is the heart of the style. Here you can set the fields which will be included for each reference type, the order of those fields, and how those fields are formatted. Begin by examining the examples and instructions in the instructions to authors. In our sample instructions we have examples of the following reference types:

- **Journal Article:** Grayhame, G. (1978). Territorial behaviour of male noble dragonets (*Draconis noblis*). *Journal of the Draconic Guild of the Realm of Faerie* **58**, 731-734.
- **Book Section:** Magnus, A. G. (1959). The nature and physiology of the pituitary hormones of dragons. In *The endocrine system in dragons* (Faust, E., editor), pp. 404-422. Amber: Unicorn Press.
- **Electronic Article:** Ambrosius, M., *et al.* (1023). Nesting behavior of the northern ice dragon. *Dragon Behavior*. doi: 10.002/db.1022.003.

These give us the information we need to create templates for a book section, a journal article, and an online electronic article, as seen below.



To create the templates—

1. Select the **Reference Types** button, then select the reference type of your choice to add an empty cell for that reference type to the template.
2. Use the **Insert Field** button to select fields and special characters to add to each cell.
3. Enter any punctuation needed by the style.

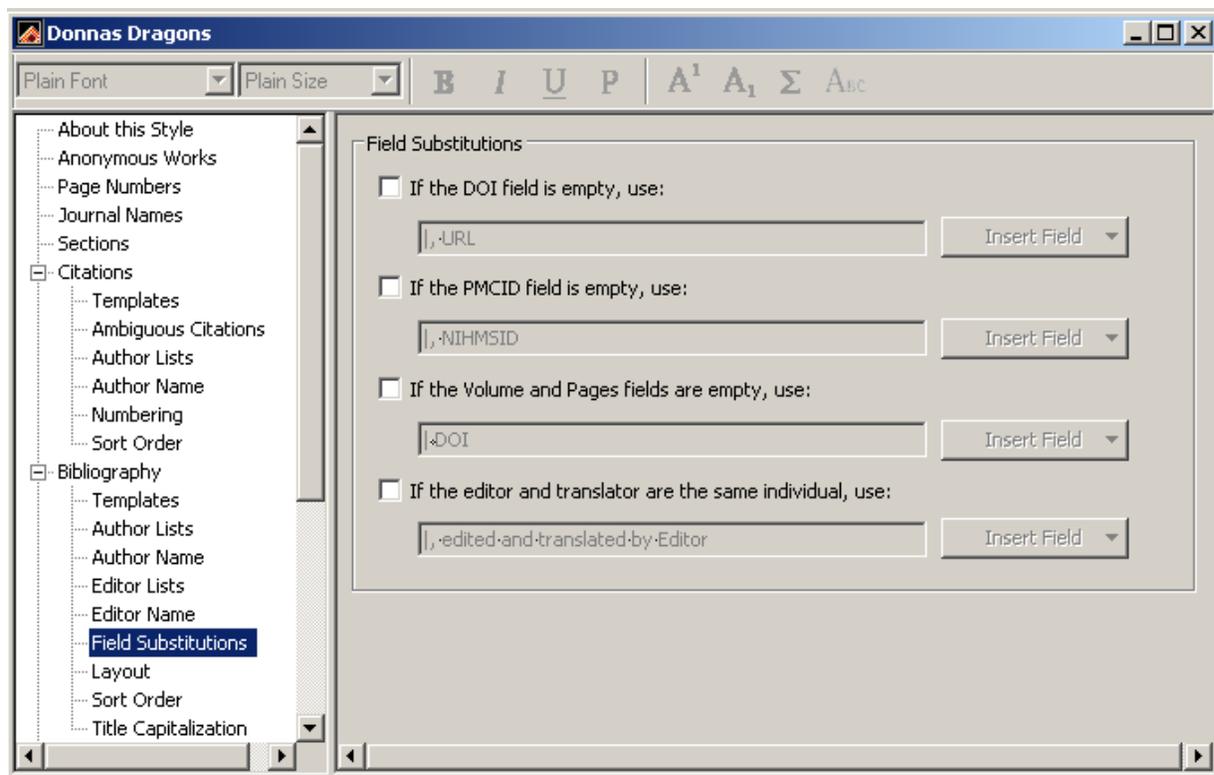
4. Select each field name that requires special formatting, such as bold or italics, then select the formatting option from the formatting toolbar in EndNote.
5. Add special characters as necessary. The special characters available for style templates are described below. With the exception of the accent grave (`), all of these can be selected from the Insert Field menu.

Special Character	Properties of Special Character
End of Paragraph (¶ : the paragraph mark)	This will insert a line break.
Tab (→ : the tab arrow)	This will insert a tab.
Singular/Plural (^ : the caret)	This is used between the singular and plural versions of textual additions to the style. For example, in the Book Section template above, “p.^pp.” indicates that if there is only one page number, then “p.” should be used but if there is more than one page number, then “pp.” should be used.
Field Name Indicator (` : the accent grave)	This is used when inserting text that is the same as a field name. EndNote reads this as the command “leave the text within the accents as typed, do not consider it a field.” In the Book Section example above, the word “editor” is also the name of an EndNote field. If it were entered without the accents surrounding it, EndNote would insert the contents of the Editor field instead of the text.
The two special characters below allow you to control how EndNote links fields, text, spaces and punctuation together in a style. By default, the punctuation and spaces following a field are linked to that field. If the field is not present in the record, neither the field contents nor the punctuation and spacing following that field will appear in the bibliography. Sometimes this can cause problems. Sometimes punctuation and spacing should be present only if the field <i>following</i> them is present instead of only when the field <i>before</i> them is present. Examples are given below.	
Link Adjacent Text (◆ : the small diamond)	This will link the text preceding it to the text following it, and usually is used in place of a normal space. It is similar to a nonbreaking space in Word. In the Book Section template above, the “p.” or “pp.” and their preceding comma should be present only if there is data in the Pages field. The Link Adjacent Text character between the comma and “p.^pp.” links the comma to the singular/plural text string; it also links the “p.^pp.” text string to the Pages field following it. If there is nothing in the Pages field, the comma and the “p.^pp.” will not appear in the bibliography.
Forced Separation (  : the vertical line)	This will break the normal link between a field and the text following it. In the Book Section example above, the colon would normally be linked to the City field preceding it. If there was no data in the City field, the colon would not appear. However, we want it to appear whenever there is data in the Publisher field, whether or not there is data in the City field. To accomplish this we put a Forced Separation between the City field and the colon, then use Link Adjacent Text to link the colon to the Publisher field.

## 2.6.2 Author Lists and Author Name

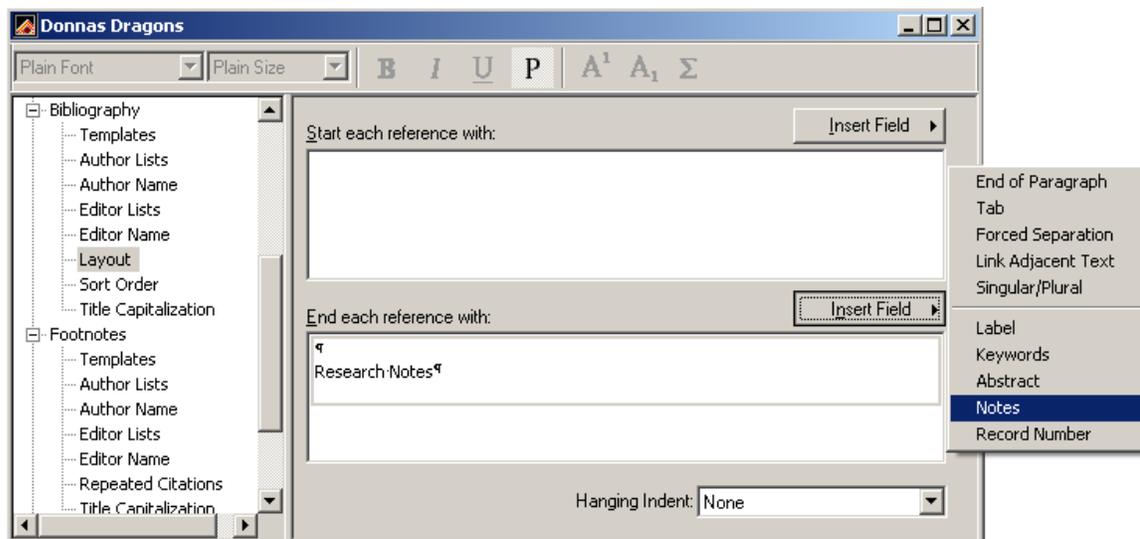
The Author Lists and Author Name sections work as they do in the citation template. The Editor List and Editor Name work the same as the Author List and Author Name fields do, except that they will be applied to the Editor and Series Editor fields for most reference types. Because the editor is the primary creator of an edited book, the Editor List and Editor Name options will not apply to the Editor field for the Edited Books reference type; instead, the Author Name and Author List options will apply to the Editor field for the Edited Books reference type.

## 2.6.3 Field Substitution



Field substitutions can be helpful where there may be a set of choices on which field to include. For example, the journal may prefer the DOI be used if it is present because it is a permanent link, but the URL for the full text be used if a DOI is not available. Substituted fields will only appear in the bibliography if the preferred field has no data in it.

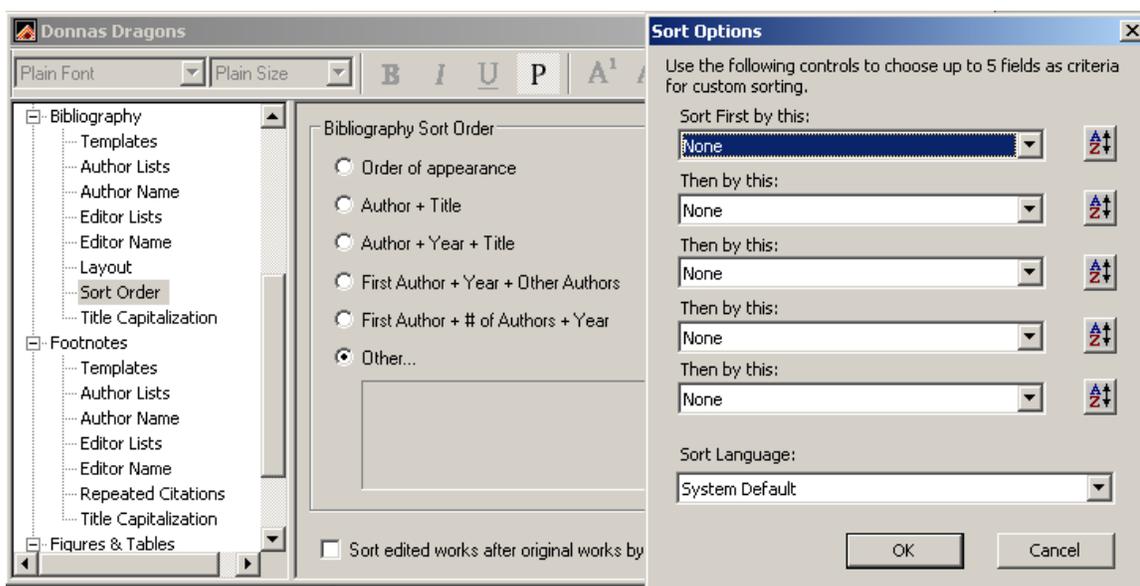
## 2.6.4 Layout



There may be times you want to add special extra fields, punctuation, or text to the beginning or end of every reference, no matter what type. You can use the Layout section for this. There is a drop-down list of fields that can only be added, as shown in the screenshot above: Reference Type, Citation (a copy of the in-text citation before or after the bibliography entry), Bibliography Number, and Record Number are such fields. However, you can also manually type in the generic field name for a field that is not on the list.

You can also set if and how hanging indents will be included for the bibliography here.

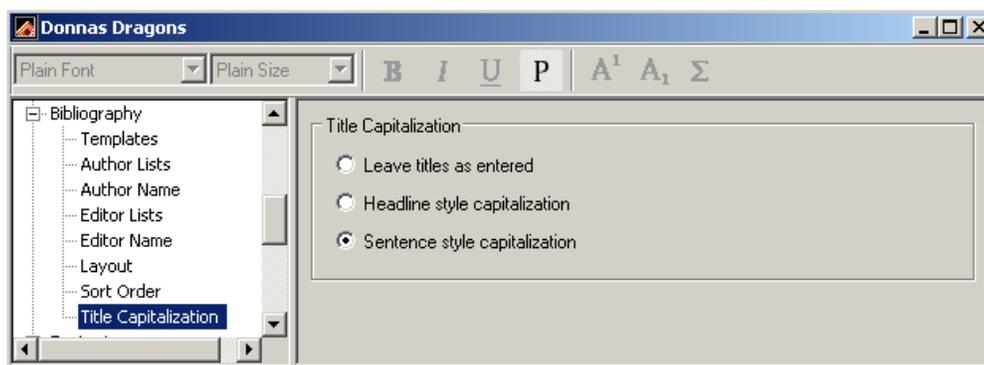
## 2.6.5 Sort Order



The Sort Order options control how references in the bibliography will be sorted. You can use one of the preset sort orders or create your own custom sort order by selecting the “Other” option. Sometimes EndNote is incapable of following the instructions to authors perfectly, as in our present example. The instructions to authors for this style require that if there are one or two authors, the references should be sorted by all author names (even if “all” is only a maximum of

two) and then chronologically, but if there are three or more authors they should be sorted chronologically. EndNote can only using one sorting order within a bibliography. EndNote must be consistent in its sorting method. I have chosen the Author + Year + Title option as that most likely to meet the requirements most of the time. [Note that sometimes the instructions do not reflect the actual practice of the journal. In a case like this, it would be worth checking some actual articles to see if the instructions really match.]

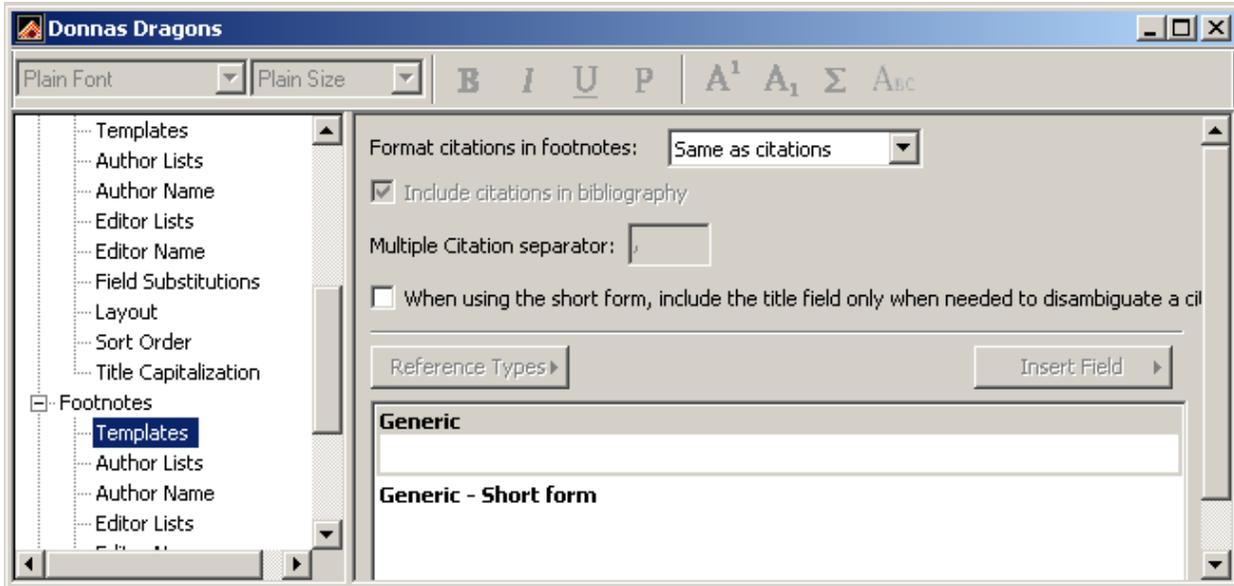
## 2.6.6 Title Capitalization



For the English language, EndNote can change the capitalization of the title used in the reference. In looking at the examples in the references I see that the titles are all in sentence case, so I have selected *Sentence style capitalization* as my preferred option. This means that if I have entered some titles in Headline style (with the first letter of each word except prepositions, conjunctions, and articles in uppercase), EndNote can convert those titles to have only the first word of the sentence, and the word after a colon, capitalized. This can be a very handy feature, but sometimes there are words that we do not want EndNote to change, such as the names of people, cities, or countries.

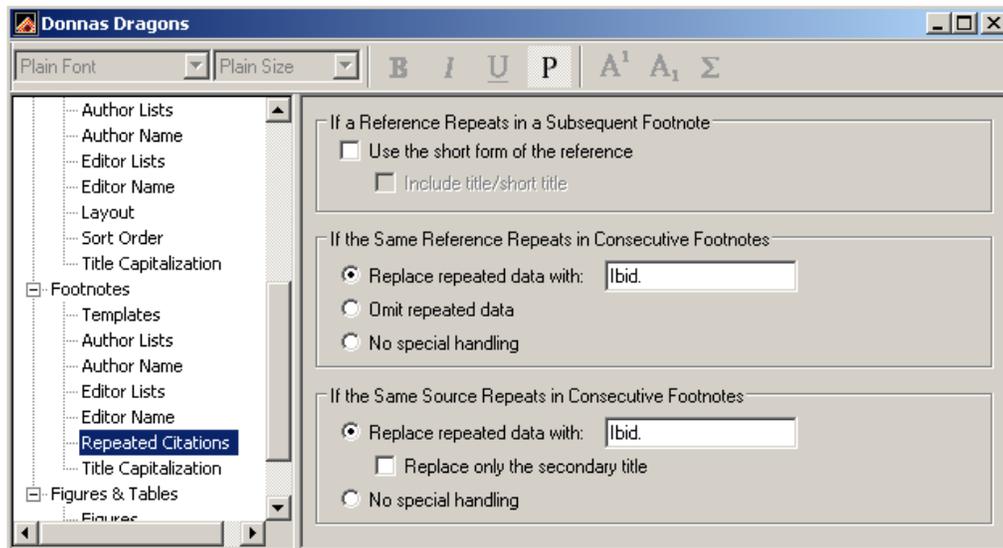
You can set a list of words that EndNote will not alter the capitalization of in the Endnote preferences. Open the preferences and select the **Change Case** option. Type in each word you want to add to the exceptions list and click on the **Add** button after each word. Close and save your preferences when finished.

## 2.7 Footnotes



The footnote settings control how any reference that is inserted into a footnote will be formatted. Its options are almost identical to those for a bibliography with the exception of the Repeated Citations options.

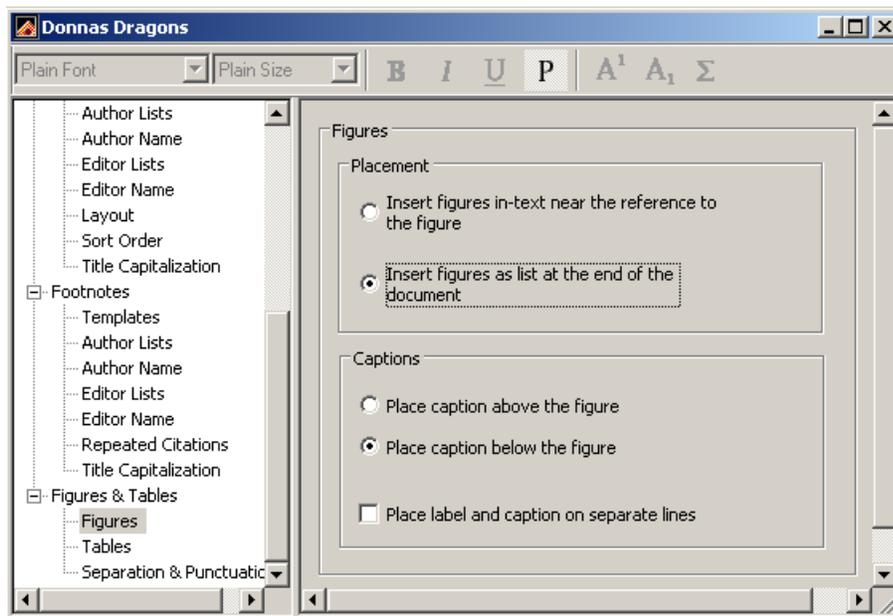
### 2.7.1 Repeated Citations



When full-reference footnotes are used, some styles require a shorter version of the footnote after the reference's first appearance in the paper. Options for how these repeated footnotes will be handled are set here.

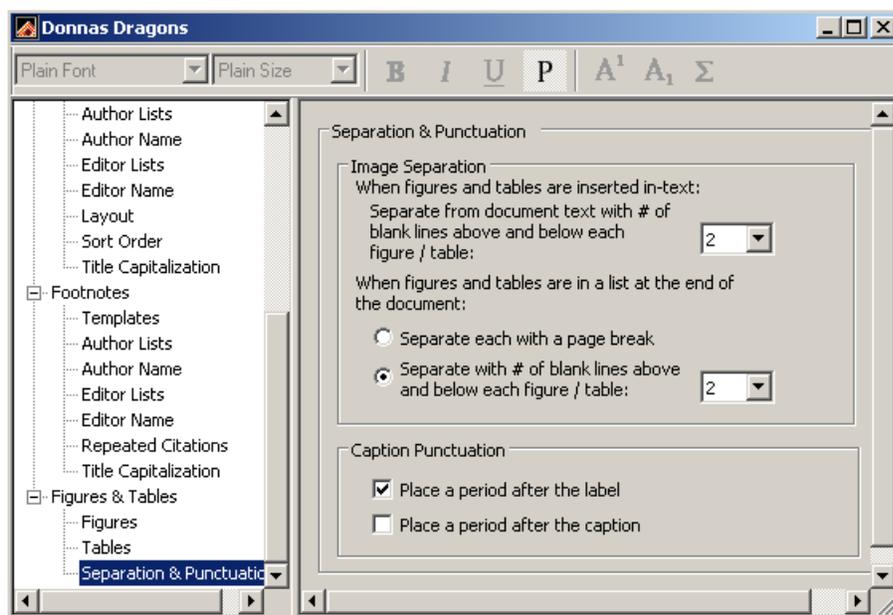
## 2.8 Figures and Tables

### 2.8.1 Figure and Table Placement Options



The screens for placement options for inserted figures and tables and their captions are identical. Here you can set if they should be inserted below the text in which they are entered or in lists at the end of the document. You can also set whether the captions should be above or below the figure or table, and if the caption and label should be on one line or two.

### 2.8.2 Separation and Punctuation

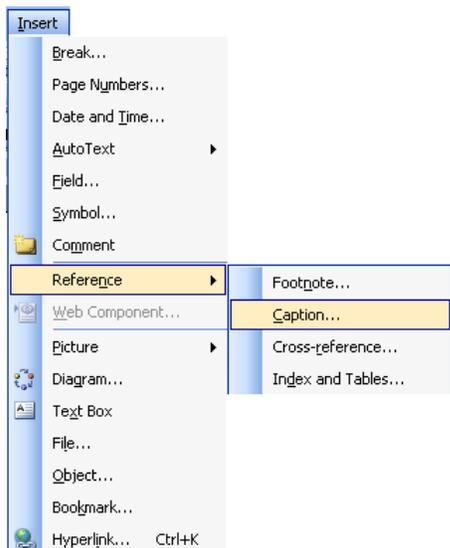


Here you can set how much space will be allowed above and below tables and figures and whether or not to place a period after labels and captions.

## 2.8.3 Setting Caption Options for Figures and Tables in Word

The instructions to authors for this style specify that table captions must use Roman numerals for their numbering while figure captions must use Arabic numerals. This is a setting that is not controlled by the EndNote style, but you can set caption numbering for a document in Word 2003 by following the instructions below and then inserting your figures and tables from EndNote.

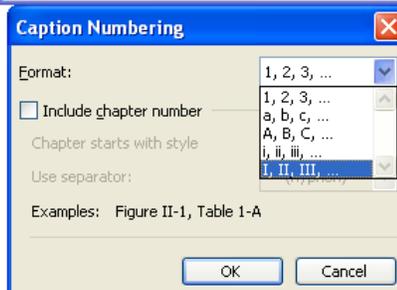
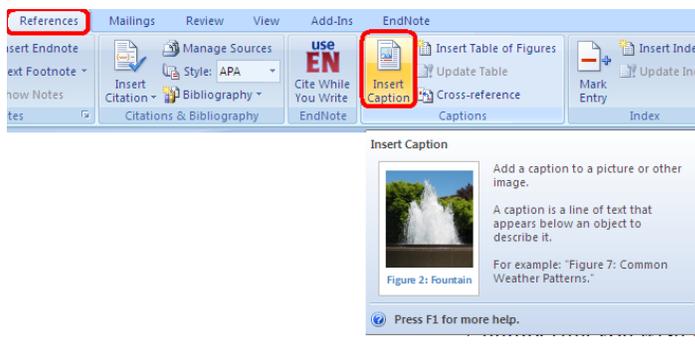
To open the caption numbering options in Word 2003 select **Reference>Caption** from Word's **Insert** menu as shown below.



In the **Caption** window select the type of caption you wish to edit from the **Label** pull-down menu, then select the **Numbering...** button. This will bring up the Caption Numbering screen, where you can set the type of numbering you wish to use.

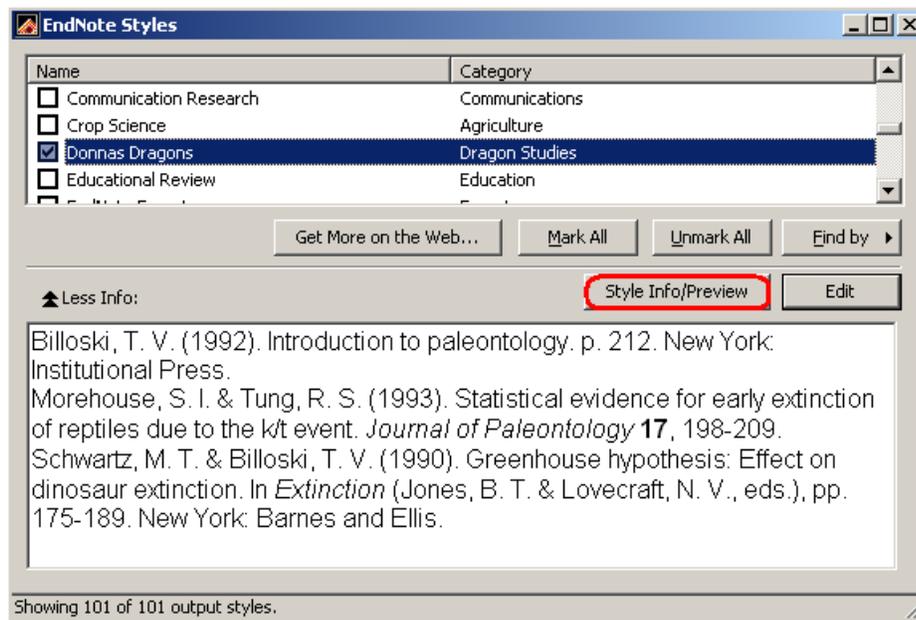


To open the caption numbering option in Word 2007 select the **Insert Caption** button from the **References** tab on the Ribbon.



### 3 Styles: An Easier Way

A far easier way to create an EndNote style is to edit a style that already exists and save it with a new name. You can preview how a style will format a journal article, book section, and book by selecting the Style Info/Preview button in the Style Manager, as shown below.



Another way to find a style similar to the one you want to create is to use the EndNote Style Finder. To use the Style Finder go to <http://www.endnote.com/support/enstyles.asp>. Enter some basic criteria as shown in the example below, such as the first three fields that should appear in the bibliography for a journal article, the citation style, and the bibliography sort order, then select the **Find Styles** button to begin your search. You will be presented with a set of styles that match your criteria. You can then take one of them and edit it instead of building the whole thing from scratch.

<b>Style Finder</b>		<b>Sorting Options</b>	
Publication Name	<input type="text"/>	First 3 Fields (Journal)	Author   Year   Title
Citation Style	Author-Year	Discipline	none
Bibliography Sort Order	Author-Year-Title	<b>Find Styles</b>	