

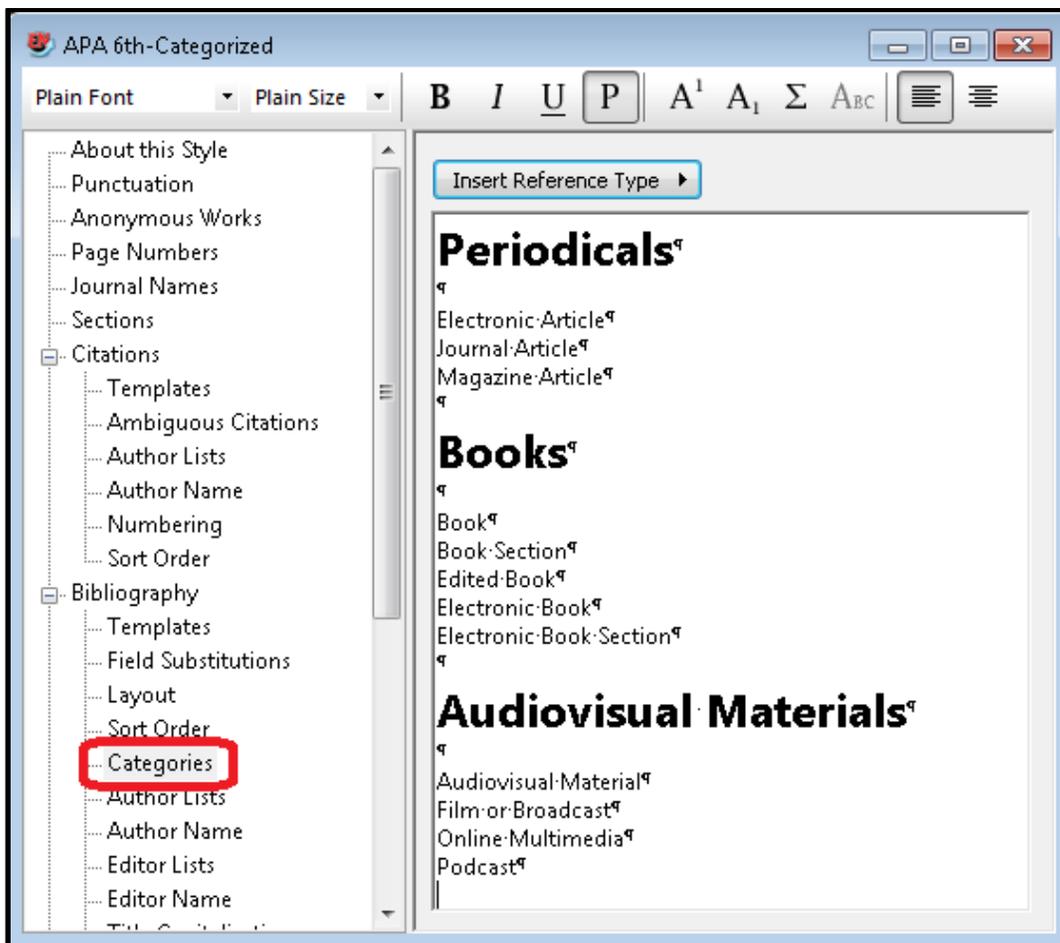
EndNote Desktop: Categories in Bibliographies Class Outline

1 Overview

With EndNote on the desktop you can create bibliographies organized under subheadings three ways, each with its own strengths.

1.1 Bibliographies Organized by Reference Type and Set by the Style

EndNote X7 added the ability to create styles that could organize a bibliography reference type. For example, if I want a bibliography showing periodicals, books, and audiovisual material in separate groups with those subheadings, I can create one. I will use the APA style as the starting point for my new style, as shown below.



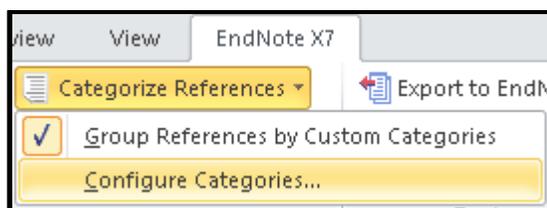
- Select *Edit>Output Styles>Open Style Manager* to open the EndNote style manager.
- Select the APA 6th style, then click the *Edit* button.
- Select the *Categories* option under *Bibliography*.

- In the window at the right, enter the text “Periodicals” (without quotation marks) then press the **Return** or **Enter** key twice to insert a blank line between the heading you just created and where the first reference type will go.
- Select the reference types you would like to show under this heading, with one reference type per line selected. EndNote will add the line breaks automatically.
- If you would like the headings to have special formatting, select them and use the formatting toolbar and font drop-down list to apply selected formats.
- Uncategorized reference types will appear in an Uncategorized References group at the end.
- Select **File>Save As** to save the style with a new name.

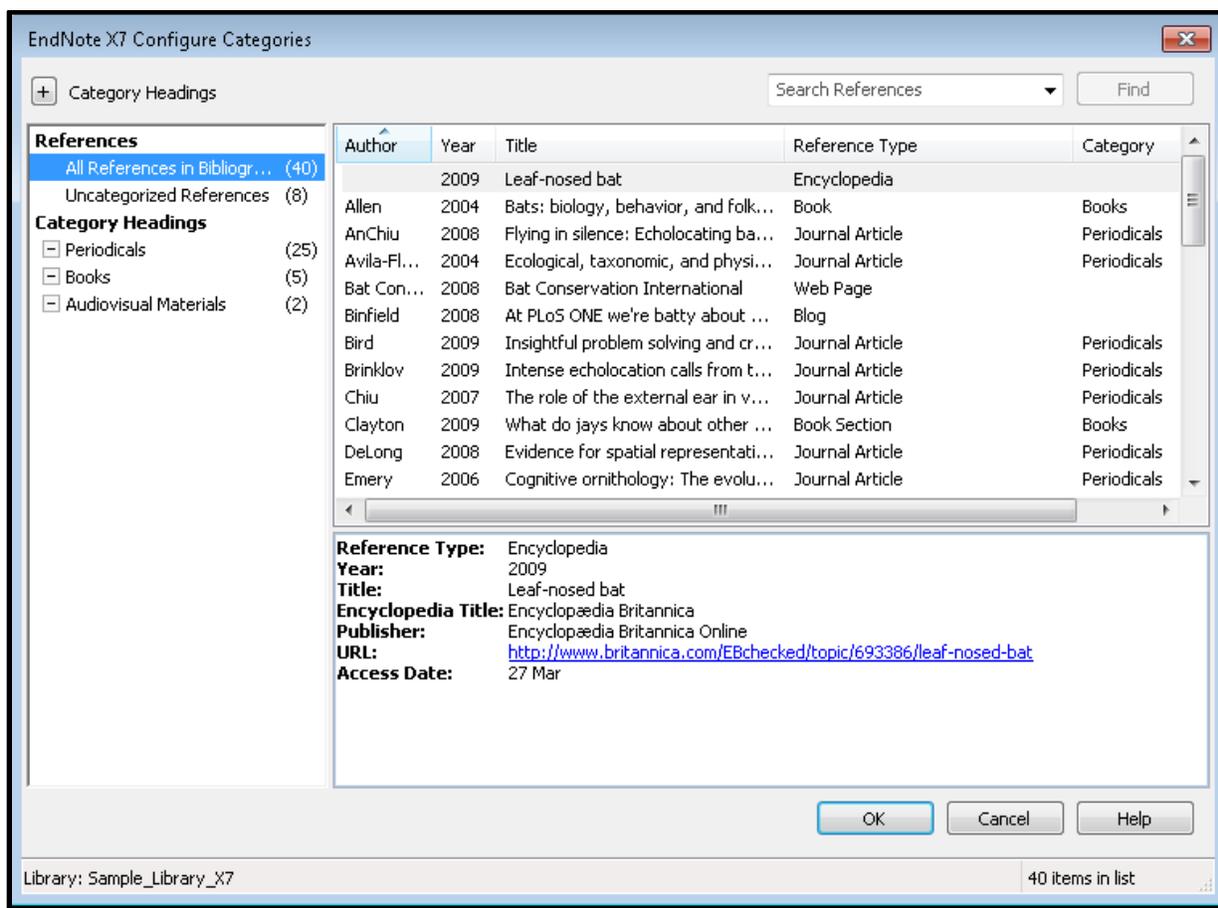
Simply using your new style in a document will result in the references being grouped by subheading. You can fine tune your categories using Cite While You Write if the output is not exactly what you want.

1.2 Bibliographies Organized by Settings in Cite While You Write

You can also create a categorized bibliography on the fly in Microsoft Word using the Categorize References drop-down menu in the Bibliography group of Cite While You Write.



Select the **Configure Categories** option from the **Categorize References** drop-down to see the window below.



Because I had already been using a style that included categories, some of the work is already done for me, but I can still add categories manually and change the groups that individual references belong to.

- To delete a category heading, click on the minus sign to the left of the heading name.
- To add a category heading, click on the plus sign in the upper left corner of the window, then type the name of the new category.
- Drag references from the Uncategorized References group to the group you want them to belong to. A reference can only be in one group.
- Click the **OK** button to close the window and see your updated bibliography.

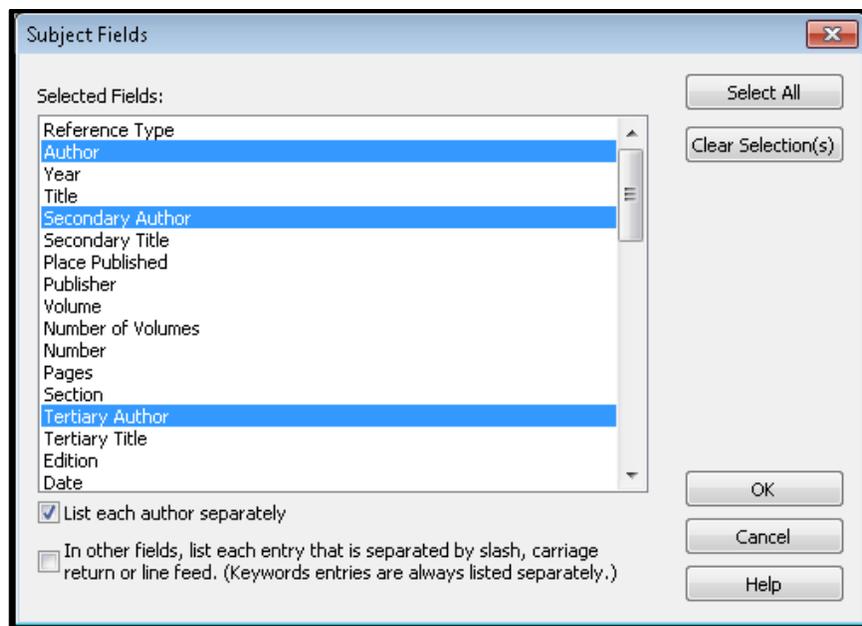
1.3 Subject Bibliographies

Subject bibliographies allow you to create independent bibliographies based on selected fields and their contents. For example, you could create a faculty publication list with references organized by author, and with the ability to have the same work appear under multiple author names for collaborative works. Subject bibliographies do not use Cite While You Write and cannot be automatically updated, but they can include the same reference under all the categories that reference matches.

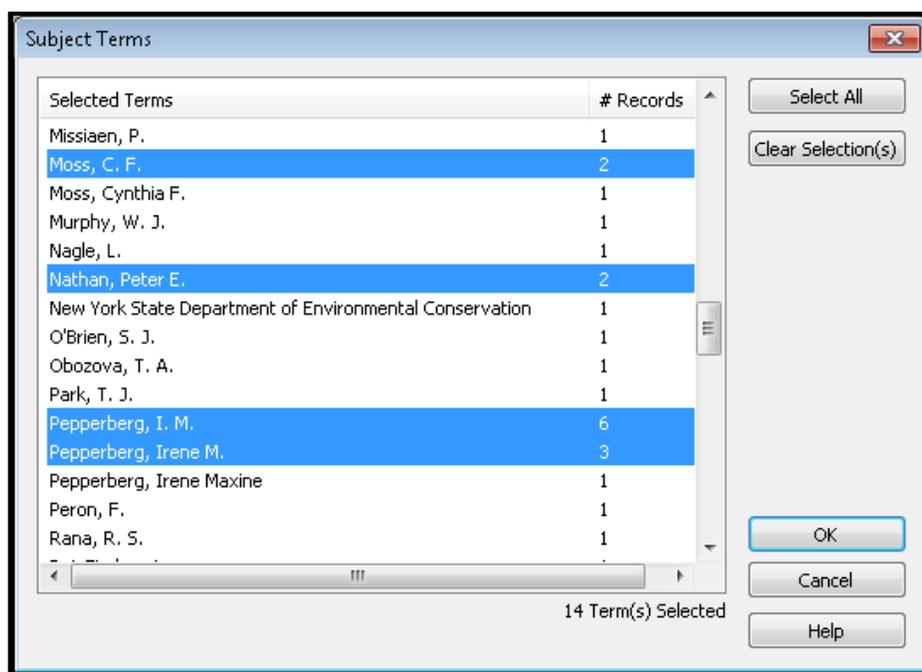
Where categorized bibliographies using styles are based on reference type, and categories in CWYW depend on which category you manually assign a reference to, subject bibliographies can be based on reference type or the contents of almost any field.

For my example I am going to create an imaginary faculty publication list using the subject bibliography feature.

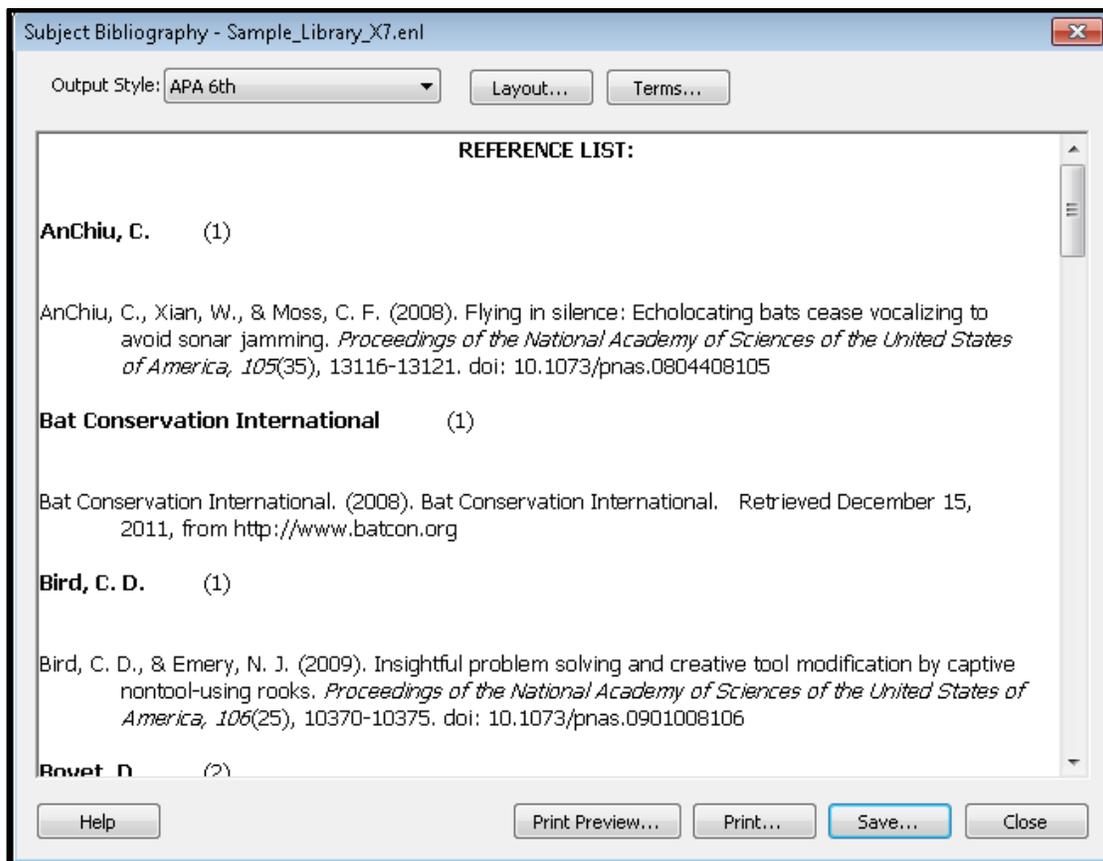
- Have the references showing in the library list that you want to base your bibliography on.
- Select **Tools>Subject Bibliography** to bring up the window below.



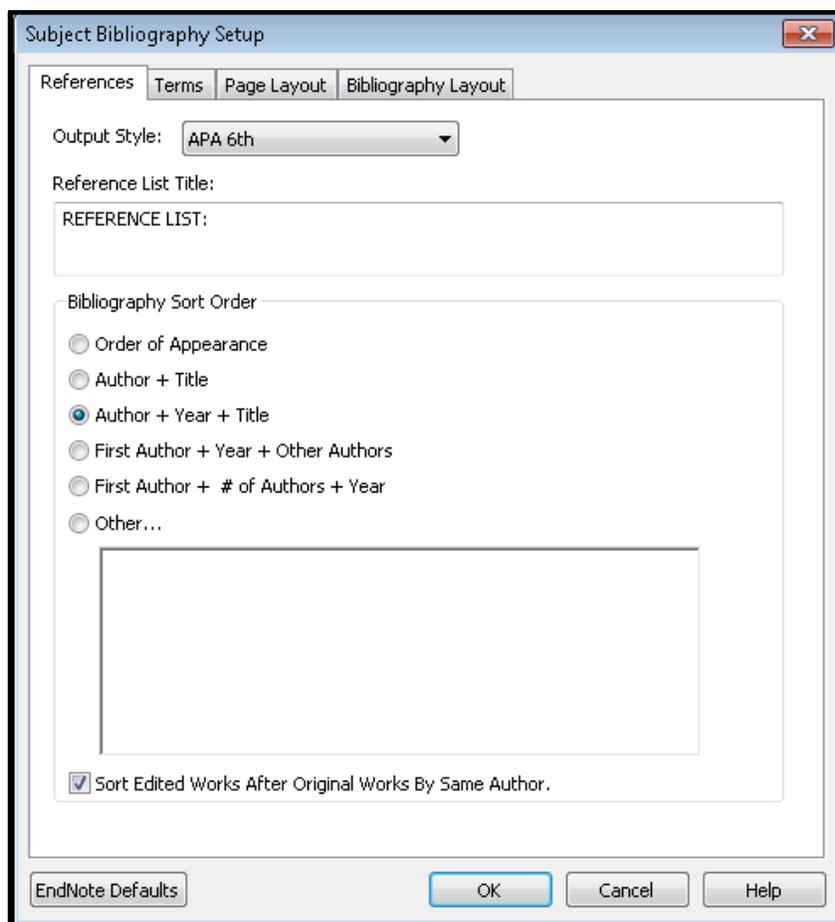
- Select the fields you want to categorize your bibliography by, then click the **OK** button. Note that Reference Type appears as a field in the list and can be selected. You will then see a window similar to the one below.



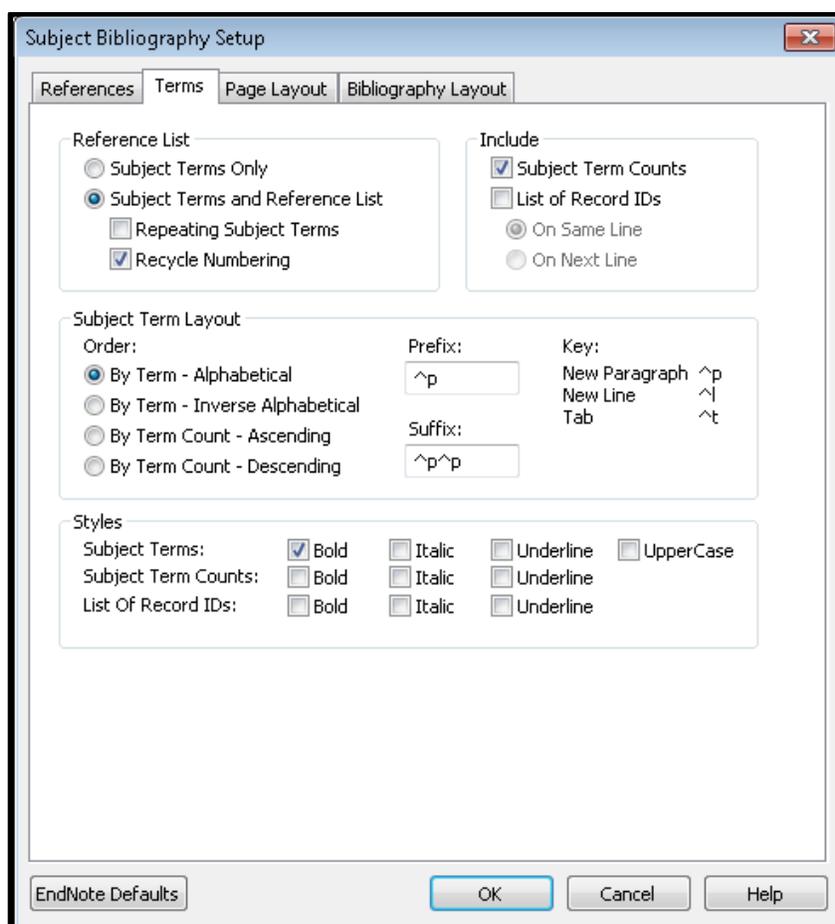
- Select the field contents you want included. For an example of a faculty publication list, select faculty members only, then click on the **OK** button. A preview of the subject bibliography with the current settings is displayed.



- Here you can select the bibliographic style that will be used for the subject bibliography and see a print preview of it, print it, or save it. I suggest saving the bibliography as a rich text format (.RTF) document rather than printing it directly. You can then open that .rtf file in almost any word processor for editing if you wish.
- If the bibliography does not appear exactly as you want, to customize it click the **Layout** button. A window with four tabs will be displayed, like the one below.

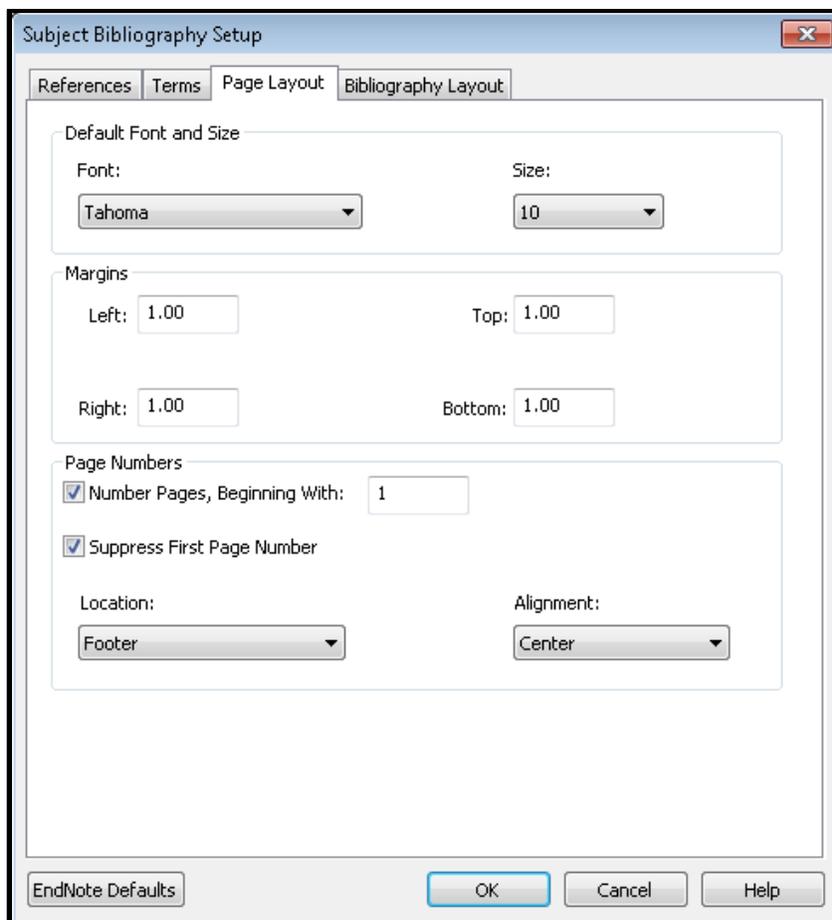


- On the References tab you can change the style the subject bibliography is based on, and then override the default settings such as the sorting order, if desired. This is also where you can set the title for the entire subject bibliography.
- Next, select the *Terms* tab.

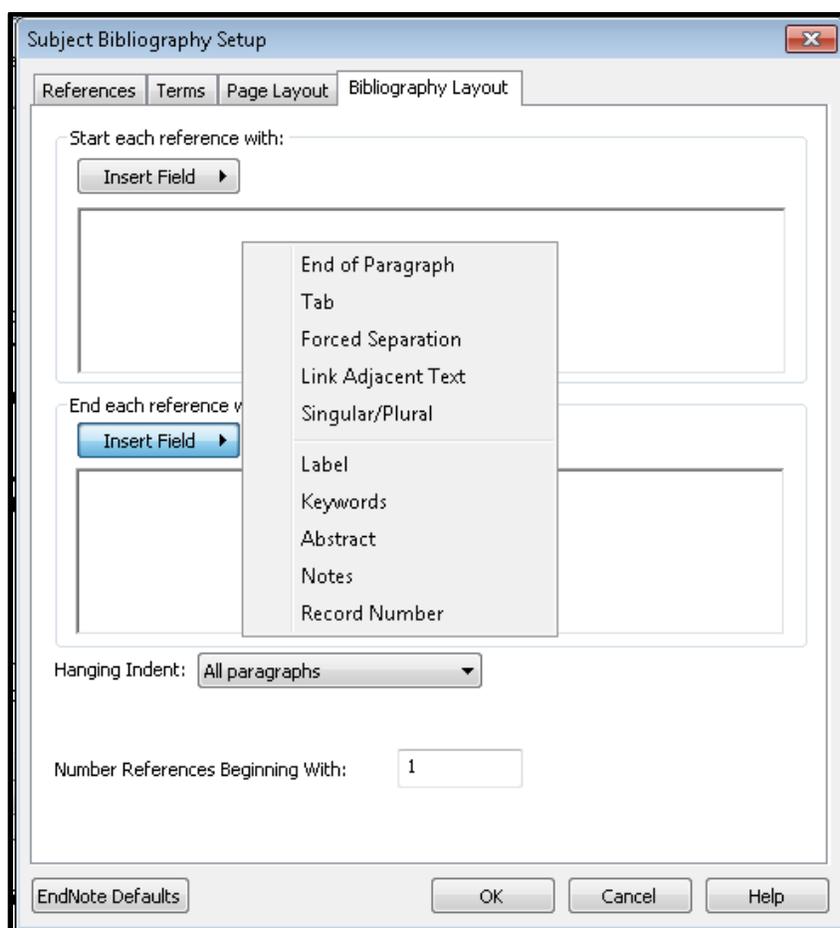


- Select ***Subject Terms Only*** if you want only the headings to appear in the bibliography. If I wanted just a list of authors who had publications, without the references themselves, I would select this option.
- Select ***Subject Terms and Reference List*** to show both the headings and the references under them.
 - Select ***Repeating Subject Terms*** if you want the heading to appear over each reference.
 - Select ***Recycle Numbering*** if you are using a numbered style and want the list under each heading to restart from number one.
- Select ***Subject Term Counts*** if you want the number of references for each heading to be displayed to the right of the heading.
- Select ***List of Record IDs*** if you want the EndNote record numbers for each reference to be displayed. These can be displayed to the right of the heading or on a separate line.
- The Subject Term Layout settings will let you set how the headings will be sorted (the sort order for the references under each heading would be set on the Reference tab).
- The Prefix and Suffix settings will allow you to add paragraph breaks (^p), line breaks (^l), or tabs (^t) before or after headings by using the special characters shown. In the example above there would be one paragraph break before the heading and two paragraph breaks between the heading and the first reference under that heading.

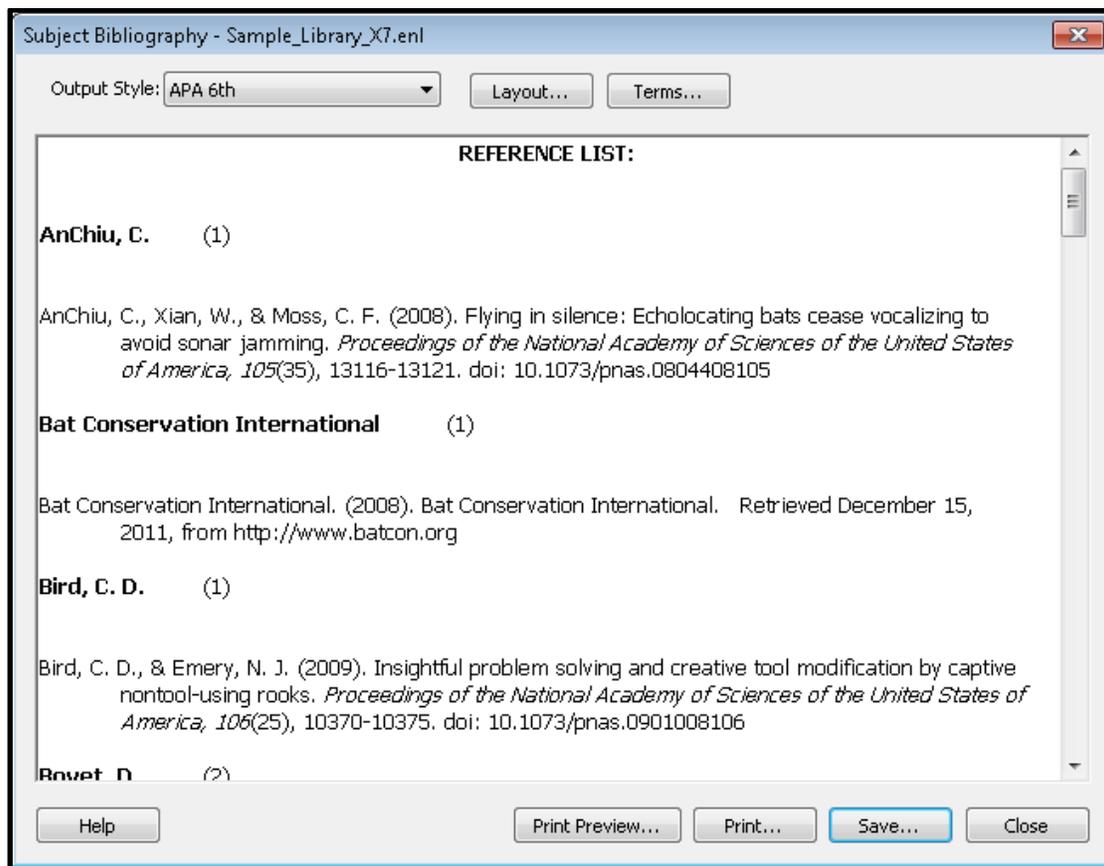
- The Styles section of the tab lets you set how the heading itself (Subject Terms), the subject term counts, and the record numbers will be formatted. The option to make the subject heading all uppercase can be used to quickly make the heading capitalization consistent if the terms originally have inconsistent capitalization.
- Next, click the *Page Layout* tab.



- On the Page Layout tab I suggest you set only two of the options because I strongly suggest you always save the bibliography instead of printing it directly. Saving it will allow you to do your final editing in a word processor, where you will have far more control over detailed formatting options than you have with EndNote. This usually results in saving a lot of trees if there is a problem with the formatting. The options I suggest setting are:
 - Set the *Font* and *Size* options for your bibliography.
 - Turn off page numbering by unmarking the option to *Number Pages, Beginning With:...*
- Click the *Bibliography Layout* tab.



- This tab allows you to add fields or text at the beginning or end of each reference that will appear in the bibliography. Although only a short list of fields appear to select from, you can also type field names in manually, but you must use the field names found in the Generic reference type. So if you had been keeping your personal annotations in the Research Notes field, you could type that field in to produce an annotated subject bibliography. Please remember to add any spacing, line breaks, and punctuation that would be needed.
- This tab also lets you select hanging indent options for all the references in the bibliography.
- When finished with all the tabs, click the **OK** button to close the window.



- Although you could print directly from the screen above, I suggest you click the **Save** button, then select the option to save your subject bibliography as a rich text format (.RTF) document. A rich text format document can be opened in Word or any other word processor, and there you can add page numbers, headers, footers, etc. The document will contain no field codes, as a Cite While You Write-formatted document would, so it can be edited as any other standard file could be.