



HINTS FOR USING ENDNOTE FOR APA 6 FORMAT

EndNote is a software program available to UT faculty, staff, and students that automates citing and formatting references in projects or manuscripts. This sheet provides some hints and tips for using EndNote for the American Psychological Association (APA) format. General help sheets for EndNote are available on the Libraries web site. Page numbers in this handout refer to the sixth edition of the *Publication Manual of the American Psychological Association*, which is available on reserve at the Carlson and Mulford libraries. APA is a very complex style; too complex for EndNote to format all references properly. This help sheet will help you identify and make any manual changes to your manuscript or project.

Getting the Updated Version of the APA Style

Download the APA6 update package from the EndNote web site and follow the installation instructions (<http://www.endnote.com/support/enapa6thstyle.asp>); there are two steps to installation (one to install the new style, the other to install an updated reference-type matrix).

Editing In-text References

With APA format, in-text citations do not always follow the form (lastname, year). For example, sometimes the author name or year need to be excluded, or, for direct quotes, page numbers need to be added. To edit specific citations, open your paper in Microsoft Word, click on the in-text citation that you would like to edit, and select *Edit Citation* from the EndNote X2 menu/ribbon and make the desired changes:

Excluding the author from the in-text citation. If you mention the author(s) by name in the sentence, you may not need to include the name in the in-text citation (see p. 174-175 of the APA Manual for an example). To exclude the author from an in-text citation, click on Exclude author.

Excluding the year from the in-text citation. If you mention the year in the sentence, you may need to exclude the year from the in-text citation. To exclude the year, select the option for Exclude Year.

Subsequent citations in the same paragraph. EndNote can handle most cases of subsequent citations (pp. 177), such as when a citation is cited a second, third, etc. time in the paper. What EndNote cannot do correctly is format a subsequent citation in the same paragraph (p. 174). For a subsequent citation in the same paragraph, exclude the year from that citation.

Adding prefixes or suffixes. The prefix field is for information to include before the citation; the suffix field is used for information after the citation. Use the prefix field in situations like *see also* or *i.e.*. See page 179 for guidance and examples of suffixes, such as *Chapter 3*.

Including page numbers for a direct quote. When citing ideas verbatim from another source, the citation to the original source includes page numbers (pp. 117-118). If you need to cite just the page numbers (as with Quotation #2 on page 118), type the page number into the paper directly, without using EndNote.

This last edit will need to be made in the final version of the paper, after the link between EndNote and the document has been broken.

Abbreviated corporate authors (“Groups as authors”) for subsequent citations. If you cite a work by a corporate author (like an organization, task force, committee, etc.) more than one time, APA format provides for an abbreviated group name for citations after the first one (pp. 176-177). In Word, add the abbreviation to the first citation; for subsequent citations, exclude the author and enter the abbreviation in the prefix field.

Editing the Reference List

Eight or more authors. If a reference has eight or more authors, APA 6 requires that the first six authors be listed, followed by three ellipsis points (periods), then the last author. The APA 6th style in EndNote includes all author names in the reference list; you will need to delete some authors and replace them with three periods (see p. 198 of the APA Manual, example citation 2).

As of December 2009, EndNote reported developing an upgrade to handle this. Until that time, a work-around would be to tweak the APA 6 style in EndNote (*Bibliography >> Author lists >> List all author names*) to show all author names in the reference list. In the final version of the paper, after the link with EndNote is broken, replace the appropriate names with ellipsis points.

Citation Clean-Up

Even using EndNote to format your references, you still need to review your references for completeness and accuracy. If the format is incorrect, it needs to be fixed in EndNote before you submit your manuscript to a publisher or submit your project or thesis to your advisor. Here are some things to check:

Author names. Are they correctly spelled and formatted? Are the in-text citations correctly formatted?

Corporate author names. Are they displaying correctly? If EndNote is abbreviating the name, make sure to add a comma at the end of the name in the EndNote library. (If it is a multi-level name, see the Basic Skills guide for where to put all of the commas.)

Anonymous works that don’t list Anonymous as the author or that don’t have a corporate author. In APA format, anonymous works use the title of the article in the reference list, and a short title in the in-text citation. Open the reference in EndNote and enter the desired short title in the Short Title field.

Titles. Are they capitalized correctly? (Sentence case for article, book, book chapter, web page titles; title case for journal titles.) If not, make the tweaks in EndNote.

Journal titles. Are the correct? For APA format, use the full title – no abbreviation, no subtitle, no “The” as the first word. This is probably the number one field that needs to be edited after importing references from a database. Be careful with some journal titles, the official full title looks like an abbreviation. For example, the full title for *JAMA* is *JAMA*, unless you are citing an article published before 1960, and then it is *Journal of the American Medical Association*. If you have any questions about the correct title of a journal, contact the Libraries. *If you will be importing references from PubMed, see the section below.*

DOI. Make sure that only the DOI is in the DOI field, as some database imports put additional information in the DOI field. (The DOI will look like this example: *10.1016/j.jocn.2008.08.009*). This is the only thing that should be in the DOI field.

In a pinch, you can make the above corrections in Word, but those changes are NOT transferred to EndNote, so the next time you format the document or if you cite the citation in another document, the error will still be there. The best thing to do is to make all corrections in EndNote.

Here’s another edit that will need to be made in the final version of the paper, after the link between EndNote and the document has been broken.

Alphabetization of reference list. Check the alphabetization of your final reference list against the APA Manual (pp. 181-183). EndNote cannot alphabetize according to APA format. After the link with EndNote is broken, move references in the reference list around as needed.

Using PubMed?

For information on importing the list into the journal list and on tweaking the style, see the Advanced EndNote help sheet.

Journal title list. When you create a new library (preferably before you enter/import any references), import the most current list of the medical title abbreviations (http://www.library.uq.edu.au/faqs/endnote/journal_terms.html) into your journal list. This allows EndNote to replace the PubMed abbreviated titles with the full title as required by APA. You will also need to tweak the APA 6 style: *Journal names >> Use full journal name.*

General Reminders

- Remember that EndNote can only do what it’s told to do with what it has...that’s why it is so important to get reference information into EndNote in the correct way (check online help or the EndNote Basic Skills guide for more information).
- Don’t forget to back up your EndNote library regularly. In EndNote, under the **File** menu, use **Save a Copy...**
- When you remove the field codes from your finished document (this breaks the link between EndNote and the document), make sure that you remove the codes from a copy of your document, NOT the master copy. (If you are using EndNote with Word 2007, the command to break the link is *Convert Citations and Bibliography >> Convert to Plain Text*. In Word 2007, this has been reported to cause problems with some formatting, like complex page numbering.)

Need Additional Help?

Contact reference at one of the University Libraries: <http://www.utoledo.edu/library/help/ask.html>