HINTS FOR USING ENDNOTE FOR APA FORMAT

EndNote is a software program available on the Health Science Campus which 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 Library's web site at *http://hsc.utoledo.edu/lib/education/ bibmgmt.html#endnote* Page numbers in this handout refer to the fifth edition of the APA Manual, which is available on reserve at Mulford.

Getting the Updated Version of the APA Style

When you installed EndNote 9 on your office, lab, or home computer, the APA style that was installed along with EndNote is not correct. To obtain the updated version, request it from Mulford Reference Assistance at *http://hsc.utoledo.edu/lib/resources.html*. We will email you the updated style with instructions on where to save it. This updated filter allows subsequent in-text citations to be formatted correctly.

Editing 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 9 menu 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. 207 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. 208-210), 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. 208). For a subsequent citation in the same paragraph, exclude the year from that citation.

> **Abbreviated corporate 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.209-210). In Word, add the abbreviation to the first citation; for subsequent citations, exclude the author and enter the abbreviation in the prefix field.

> **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 the back of this page for information on using the suffix field for including page numbers for direct quotes.

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). Because of the complexity of forms for citing citations and page numbers, EndNote cannot handle these very well. The best way to handle page numbers is to use the suffix option, NOT the page number option. Enter page number information in the suffix field in this format: *, pp. 230-231* or *, p. 123*   (start with a comma and a space). 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.

Short Titles for Anonymous Works

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.

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.

    Titles. Are they capitalized correctly? 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. (PS – The full title for JAMA is JAMA, unless you are citing an article published before 1960, then it is Journal of the American Medical Association. If you have any questions about the correct title of a journal, contact Mulford Reference at 419.383.4218 or *MulfordReference@utoledo.edu*.)

In a pinch, you can make the 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.

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 9 Basic Skills guide for more information).

- Don't forget to back up your EndNote library regularly. Under the File menu in EndNote, 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.