Desktop EndNote guide 4

Editing output styles

For EndNote version X7
This guide will take you through the process of editing output styles. The output style controls the way in which the references are formatted and the bibliography is displayed in a document. Some styles are provided with EndNote. You can also edit styles to suit your own needs.

**Using an existing EndNote output style is explained in Desktop EndNote Guide 1.**

Background information about EndNote is available on the Library website at:  
www.reading.ac.uk/library/endnote

**Selecting a favourite style**

You can customise EndNote to use selected styles.

1. Open EndNote and from the Menu bar select *Edit*
2. Select *Output styles*
3. Select *Open style manager*
   
   This will open a dialog box showing several hundred of the most used preset styles.

4. Mark the styles you would like to have as favourites by clicking in the check box beside the style name (see Harvard in the example below)

   ![Style Selection](image)

   When you format your bibliography in Word the styles you have selected will appear in the favourites list, saving you having to browse through the whole list.

5. To look at a style click on the *Style Info/Preview* button.

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Tips:
- Click on the Unmark All button to unmark the currently selected output styles.
- Uncheck the box next to the style name to deselect one style at a time.
- Click on Name to see the list sorted by name or Category to see styles sorted by subject type.
- Selecting More Info will hide the panel at the bottom of the screen. When you do this the button change to Less Info - select this option to see the panel again.

Close the EndNote Styles window when you have finished.

Editing output styles
This worksheet covers some simple changes to output styles. Advanced users should consult the help pages in EndNote for advice on making more complex changes to styles.

1. In EndNote select Edit, then Output Styles then Open Style Manager
2. Select the style you want to edit (eg Harvard)
3. Click on the Edit button
4. A list of options is displayed in the left hand half of the screen. The top five options (Punctuation, Anonymous works, Page Numbers, Journal Names, and Sections) are general and changes here can apply to citations, bibliographies and footnotes. Highlight the option on the left hand side of the screen to see the settings and change if necessary

5. Other options only apply to the section they are shown under - Citations, Bibliography, Footnotes. For these you will see Templates listed under each section heading. You must be in the correct section to make the change
Editing style templates

The template panels show the major components of a style. They tell EndNote how to format references in that style. The display shows field names, punctuation, and text style for all the elements (e.g., italics). The template shows you a sample of what the output will look like, but you see the field names instead of an actual record.

In this example, the template for the Bibliography is shown. Note how certain elements of the reference are formatted (e.g., the Journal name will be in italics).

Modify the style by making the change in the correct template.

Changing the text style of part of a reference

In this example we are going to change the volume number in the Journal Article to appear in bold in the bibliography.

1. Select the right reference type - Journal Article.
2. Highlight the part of the reference you want to change (Volume), then use the formatting toolbar to change it to bold.

Note: you can also apply italics, underlining, add a line break, superscript and subscript numbers. Don’t forget to make the same change in all the reference types it applies to. For example, if you wanted the author in bold, you would have to change it in every reference type to make your references consistent.

Changing the style in which authors’ names appear

Sometimes authors’ names do not appear in the right style - they may be displayed in Capitals, instead of sentence case (e.g., SMITH instead of Smith). To change this:

1. In the Bibliography section select Author Name
2. Use the pick-list to change the Capitalisation to Normal
Changing how multiple authors appear in citations

In the next example we are going to change the way that multiple authors appear in the Citations in Word.

1. In the Citations section select Author Lists

2. You can now choose how many names you wish to appear in the citation in the text of your Word document. You can also specify that a different number of names appear in the first instance and subsequent instances of a citation.

Tip: you could also change et al to appear in italics by clicking in the checkbox:

and abbreviate with: et al  □ Italic

Applying hanging indents in your bibliography

Many numbered bibliographic styles require a hanging indent to indent the second and subsequent lines of each reference in a bibliography.

1. In the Bibliography section select Layout

2. Use the Hanging Indent pick-list (at the bottom right-hand corner of the window) to choose the most suitable option: None, All Paragraphs, First Paragraph Only, Second Paragraph Only and All Paragraphs.

3. It is often used together with a tab to align the start of each reference after a bibliography number with the subsequent lines of the reference. Click on the Insert field pick-list to select what you want to start each reference with, eg Tab.
Saving and using your amended style

1. Close the Style window. You will be prompted to save your amended style with a new name.

   Note: EndNote will save the file to a Styles folder held in your Personal folders on your C: drive (or your N: drive if you are using an ITS managed PC) and both versions will appear in your list of styles in the Style Manager.

2. Use the Style pick list on the EndNote toolbar to select your amended style. If you make subsequent changes to the style use the Update Citations and Bibliography icon on the EndNote toolbar to apply the changes you have made.

Downloading output styles

There are thousands of output styles available from the Downloads section of the EndNote support site at endnote.com/downloads/styles. Most of them are for specific journals, so check whether the one you need is there before editing another. You can also download a customised Harvard style from the Library website www.reading.ac.uk/lib-endnote-styles.aspx.

If you download a style you must save it into an EndNote styles folder held in the personal folders on your computer. However, this folder does not exist until you have saved an amended output style. By following the steps above, and saving an amended output style, you will have created this folder.

The location of this folder for users of the later versions of Windows is C:\Users\[Your User Name]\My Documents\EndNote\Styles.

Further information and help

- Consult the EndNote information on the Library website at: www.reading.ac.uk/library/endnote
- Use the Help button within EndNote
- Visit the EndNote website - provides technical support; updates to filter, connection and output style files; FAQs and tip sheets. www.endnote.com/support