

How the EndNote Gives Accurate In-Text Citations in Academic Writing

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Abstract

EndNote is a reference management software programme among many others—such as Mendeley, RefWorks, and Zotero—for storing, managing, retrieving, and using sources for citation in an academic writing. This phenomenological study deals with how the use of the software gives accurate in-text citations of all types of references, such as, books, book sections, theses, journal articles, webpages, and newspaper articles with reference to APA 7th style of academic writing. For this, I draw reflections on my own direct experience of using EndNote for the purpose of citation as a practitioner, tutor, and trainer during the last four years. I categorize the in-text citations into themes on the basis of the way they can be accurately managed in MS (Microsoft) word file, and describe how to enter the input so that the resultant output gives accurate in-text citation with special reference to APA 7th. Drawing on the findings, I have concluded that the use of EndNote helps to accurately and systematically manage the citation with very little manual adjustment, and thereby to accelerate and systematize the academic writing as a whole.

Key terms: *EndNote, In-text citation, EndNote library, APA 7th, Default citation, Primary citation, Secondary citation.*

Introduction:

Citation (or reference) management software is gaining a good ground of popularity in academic writing across the world. I have been using the EndNote to manage citation in academic writing as a practitioner, teacher, and trainer for about four years. Any citation management software including End Note is supposed to give accurate in-text and end-text citations. My direct experience of using EndNote shows that if all the sources used are cited using EndNote, there is no possibility of mismatch between in-text and end-text citation. However, using EndNote is not a panacea for solving all the problems. More

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specifically, the EndNote with the original reference types and output styles of writing does not give accurate output. They need configurations for accurate citations of some of the reference types. Therefore, the MPhil or PhD thesis supervisors, research committee members, and the evaluators often comment on the inaccuracy of citation even if the citations are managed using the EndNote. In this context, one of the research committee members of the Faculty of Education, Tribhuvan University, Kathmandu, Nepal, in personal communication, reported that most of the MPhil and PhD candidates defend themselves stating that they have managed the citations using EndNote. This implies that the candidates neither configure the reference types and styles so as to make the EndNote bring about accurate citation nor they make necessary manual correction to conform to the selected style of academic writing.

Regarding the accuracy of the in-text citation—the concern of this paper—my lived experience reflects that there is no need to configure the original EndNote reference types and styles. The only task is to edit the default citation strategically so as to conform it to the selected style (here, APA 7th) of writing. There are a number of literature, such as Hupe (2019), Lonergan (2017), Lorenzetti and Ghali (2013), Sherwin (2020) and Walker et al. (2007) on the use of EndNote. However, the review of literature shows that there are a very few studies on how to bring about accurate in-text citations of all types of references using the EndNote. Therefore, this paper deals with how to utilize the EndNote library to bring about accurate in-text citations of various types of sources used with special reference to the APA 7th style of writing.

In this paper, I have conceptualized the in-text citation as one of the two complementary parts of citation or reference while the other complimentary part is called (full) end-text citation or reference citation (see American Psychological Association [APA], 2010, 2020). However, this paper deals only with the in-text citation focusing on how to manage accurate in-text citation and connect each of them with the corresponding end-text citation using the EndNote library though both the parts (i.e., in-text and end-text citations) are simultaneously managed through EndNote. Therefore, the research problem is to consider how to bring about accurate in-text citations. Accordingly, the overarching objective of this paper is to demonstrate through writing and screenshots some basic operations for citing sources from the EndNote library that reveal accurate in-text citations in accordance with APA (2020)—that is, APA 7th style of writing.

Therefore, my concern in this paper is to share with the readers some strategical aspects of using EndNote for bringing about accurate in-text citations in an academic writing on the basis of my lived experience of using it. My lived experience and its meaning making can help the readers systematize their academic writing. Therefore, this paper is expected to be beneficial to all the academic writers, researchers, research

supervisors, librarians, EndNote trainers and users, and even to the ones who have not yet used EndNote but are willing to use it for managing and citing sources in their academic writing.

Literature Review:

‘Reference’ is usually regarded as a cover term and ‘citation’ as a part of reference. For example, A. Holly Patterson Library (n.d.) regards citation as a cover term dividing it into parts: in-text and end-text citations. However, in Shibly’s (2016) conceptualization, reference refers to a list of cited documents given at the end of the text while citation is included within the text. In APA style of writing, the in-text citation is usually in the form of (Author, year) or Author (year) called “author–date citation system” (APA, 2020, p. 263) with various modifications or extensions specific to the context of the citation. The end-text citation (also called reference or end-of-paper citation) refers to the fuller notation providing all necessary details about the source of information that appears in the reference list at the end of the paper. In this paper I have conceptualized ‘citation’ as synonymous to ‘reference’, which has two complementary parts: in-text citation and reference citation (also called end-text or end-of-paper citation) (see APA, 2010, 2020).

Citation management software (also called reference management software), such as EndNote, BibTex, RefMan, RefWorks, Mendeley, and Zotero, is a software that can be used to store, manage, retrieve, and cite the sources in MS Word, and thereby to systematize and accelerate academic writing (Lonergan, 2017). Citation management software is becoming popular with both students and faculty in higher education across the world. In this paper I deal with EndNote as the citation management software, which provides format for the citation of nearly all types of sources in almost all types of styles, such as APA, MLA, Vancouver, Chicago, and so on.

In their research studies concerning reference management software, Lorenzetti and Ghali (2013) determined the extent to which authors utilize such software for generating systematic reviews. They also identified the software that is more commonly used and considered easier to navigate.

Hupe (2019) exclusively discusses the new features introduced in EndNote X9, the upgraded version of EndNote that had been recently released by Clarivate Analytics as a bibliographic citation management tool. This study is confined to exploring the additional features in EndNote X9 when compared to its earlier iteration.

In a reflective study, Mendes et al. (2019) concluded that employing EndNote enhances the quality of scientific texts. Although this study covers the broad applications of citation management software, specifically EndNote, it does not delve into the core aspect of citation management itself— which is the primary focus of the current study.

Overall, the literature review shows that few studies have explored the refinement


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of in-text citations for precision through the utilization of EndNote, drawing from the author's firsthand involvement as both a learner and proficient user, as well as a trainer of EndNote. This paper represents a significant stride towards filling this void in research.

Methodology:

This study aimed at exploring my lived experience of editing default EndNote citation so as to bring about the accurate in-text citations in academic writing. For this, I utilized auto-reflective phenomenology. Phenomenology in general deals with gaining “a deeper understanding of the meaning of everyday (“obvious”) phenomena” (Vagle, 2018, p. 35). In reflective phenomenology, the prior taken-for-granted world is bracketed in order to concentrate on our perception of the real world phenomena (Smith et al., 2009). More specifically, auto-reflective phenomenological approach “involves the analytical isolation of phenomena” (Gorichanaz, 2017, p. 3) experienced by the self. In this study I asked myself how I managed the in-text citation using EndNote, and recalled the steps I followed to bring about accurate in-text citations using various sorts of records of the past events regarding the management of in-text citations. In this paper, I have descriptively analyzed the data (i.e., my lived experience of managing in-text citation through EndNote) thematically and presented the findings using verbal description and demonstration-through-writing-and-screenshots methods. That is to say, I share through writing and screenshots some strategies of editing default EndNote citations so as to accurately manage the in-text citations of the sources used with reference to APA 7th style of citation.

Results and Discussion:

I have analyzed and interpreted my direct experience of how I was able to accurately manage the in-text citations in academic works including my PhD thesis. First, I tried to manage the in-text citations on the basis of the basic operations of putting the cursor in a particular space in the word document where the citation is to be inserted, then going to the EndNote library and selecting the reference to be cited, clicking on the symbol ‘’ for ‘Insert Citation’ in the EndNote library toolbar. This series of commands resulted in the insertion of the in-text citation in the intended place, and appearance of the full reference citation at the end of the text in the intended style of writing. However, the default in-text citation appears in simple parenthetical form as (Author, Year), which is not appropriate in all contexts. The following sections deal with how after several trials and errors I ultimately edited the default in-text citations into appropriate ones depending on the contexts and types of sources used as per the APA 7th style of academic writing.

Basic In-Text Citations:

Basic in-text citations include the in-text citations of general works such as books, book sections, and articles with several types of author as shown in Table 1.

Table 1. Basic In-Text Citation Styles

Author type	Parenthetical citation	Narrative citation
One author	(Luna, 2020)	Luna (2020)
Two authors	(Salas & D' Agostino, 2020)	Salas and D' Agostino (2020)
Three or more authors	(Martin et al., 2020)	Martin et al. (2020)
Group author with abbreviation First citation Subsequent citations	(National Institute of Mental Health [NIMH], 2020) (NIMH, 2020)	National Institute of Mental Health (NIMH, 2020) NIMH (2020)
Group author without abbreviation	(Stanford University, 2020)	Stanford University (2020)

(APA, 2020, p. 266)

As shown in Table 1, in parenthetical citation, both the author(s) and the year of publication are kept in parenthesis in the form of (Author, Year) whereas the non-parenthetical or narrative citation takes the form of Author (Year). The narrative citation sometimes takes even the possessive form, such as Author's (Year). Therefore, all such possible citations are discussed under all the author types mentioned in Table 1.

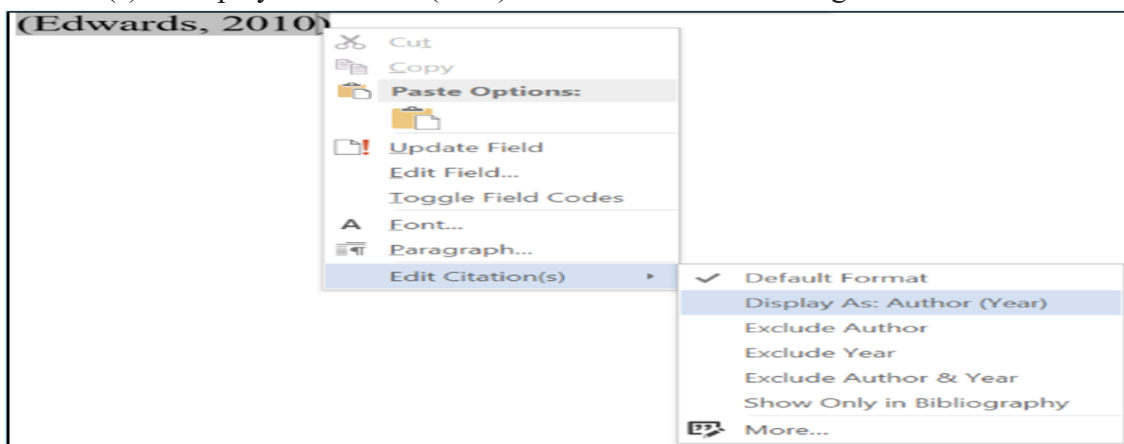
One Author. The default EndNote in-text citation of a one-author work appears in parenthetical form along with its end-text citation as:

2/15/2023 6:53:55 PM

(Edwards, 2010)

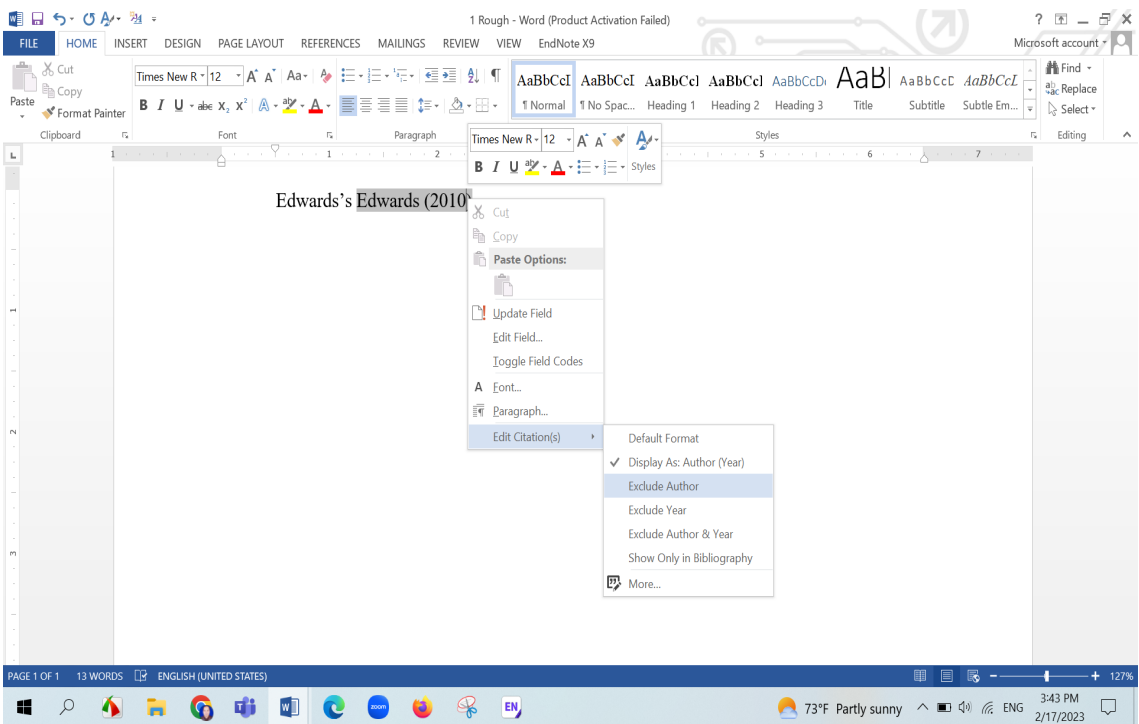
Edwards, J. (2010). *Language diversity in the classroom*. Multilingual Matters.

To convert this parenthetical in-text citation into narrative one: Edwards (2020) as required, the default citation is edited following the steps: right-click on it > Edit Citation(s) > Display As: Author (Year) as shown in the following screenshot:



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When the subjective narrative citation needs to be changed into possessive as Edwards's (2020), such as Edwards's (2020) idea that . . ., I type the possessive form of the author before its subjective form as Edwards's Edwards (2020), and exclude the author following the steps: right-click on the subjective narrative citation > Edit Citation(s) > Exclude Author as shown in the following screenshot:



Two Authors. The two-author work, as one-author work, appears in parenthetical form in its default in-text citation along with its end-text citation as shown in the following example:

2/17/2023 5:51:38 AM

(Baker & Wright, 2017)

Baker, C., & Wright, W. E. (2017). *Foundations of bilingual education and bilingualism* (6th ed.). Multilingual Matters.

The parenthetical in-text citation in this example can be changed into narrative one in the same way as the parenthetical citation of the one-author work since every parenthetical citation can be converted into non-parenthetical one in the same process. The only but slight difference is of the product. That is to say, the two authors are separated by '&' in parenthetical citation while the '&' is replaced by 'and' in narrative citation as per APA (2020). This change automatically occurs while converting the parenthetical

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citation into non-parenthetical one using EndNote. For example, the narrative form of the citation (Baker & Write, 2017) appears as Baker and Write (2017). For the conversion of this citation into possessive one, I type the possessive form before the citation as Baker and Write's Baker and Write (2017), and exclude the author from the automated citation. Then, it appears to be Baker and Write's (2017).

Three or More Authors. As shown in Table 1, the in-text citation of a work with three or more authors includes the surname of the first author followed by et al. We can automatically manage this using EndNote. For example, the default in-text citation of a work by three authors along with its end-text citation appears as:

2/18/2023 3:28:54 PM

(Clark et al., 2007)

Clark, J., Yallop, C., & Fletcher, J. (2007). *An introduction to phonetics and phonology* (3rd ed.). Blackwell Publishing.

We can edit this citation into subjective and possessive narrative citation through EndNote so as to result in Clark et al. (2007) and Clark et al.'s (2007) respectively in the same way as the one or two-author work.

Group Author With Abbreviation. The group author is written in its full form in the first in-text citation in a work. This appears automatically in the default form while citing through EndNote, such as (American Psychological Association, 2020). The successive in-text citation of a work with a group author (also called corporate author) is usually abbreviated as (APA, 2020) in parenthetical form, and APA (2020) in narrative form. For the derivation of (APA, 2020) from (American Psychological Association, 2020), follow these steps: right-click on it > Edit Citation(s) > More. The following display will appear:

2/17/2023 12:30:23 PM

Edit Citation	Reference
Formatting:	Default
Prefix:	<input type="text"/>
Suffix:	<input type="text"/>
Pages:	<input type="text"/>

Edit the fields in this display as follows:

2/17/2023 12:46:47 PM

Edit Citation Reference

Formatting: Exclude Author

Prefix: APA,

Suffix:

Pages:

Tools

OK Cancel Help

Note: There should be space after APA,
Click on OK, and you will get (APA, 2020).

For getting the citation as APA (2020), exclude the author from the automated citation: (American Psychological Association, 2020), and type APA before the result.

Group Author Without Abbreviation. In the end-text citation of any work with a group author, we “spell out the full name of the group as presented in the source” (APA, 2020, p. 268). Similarly, the first in-text citation of a work with a group author is never abbreviated. The successive citation can be abbreviated if the abbreviation is well known. If the abbreviation is not well known, we write the full form as given in the source. For such citation, there is no need to edit the EndNote citation except converting the default parenthetical citation into narrative one as needed.

Citation With Page Number:

Following APA (2020), we provide the author, year, and page number of the ‘direct quotation’ (which reproduces words verbatim from another work) cited in the text in either parenthetical or narrative format. There are various ways of indicating page number. Only the page number in parenthetical citation is added through EndNote. To add the page number in the parenthetical citation- (Baker, 2011), for example, right-click on the citation > Edit Citation(s) > More to get the following display field:

Edit Citation Reference

Formatting: Default

Prefix:

Suffix:

Pages:

Tools

OK Cancel Help

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Type the page number of the cited quotation (e.g., 22) in the slot corresponding to 'Pages:' in the field as shown below:

2/17/2023 5:22:37 PM

Edit Citation Reference

Formatting: Default

Prefix:

Suffix:

Pages: 22

Tools

Then, click OK or press enter to get the intended result as (Baker, 2011, p. 22). If the quotation cited extends on two or more pages, then the initial and final page numbers are typed separated by an en dash as shown as follows, for example:

2/17/2023 5:32:59 PM

Edit Citation Reference

Formatting: Default

Prefix:

Suffix:

Pages: 22-23

Tools

Then, click OK or press enter to get the intended result as (Baker, 2011, pp. 22–23).

The page number is not given adjacent to the year of publication in non-parenthetical citation. In such case, the page number(s) are typed manually at the end of the cited material. For example, APA (2020) states that “Each work cited in the text must appear in the reference list, and each work in the reference list must be cited in the text” (p. 257). The page number of the quotation is indicated at the end of the cited block quotation (i.e., the quotation that contains 40 words or more) as well when the author and year are introduced earlier. For instance, we can write: In APA’s (2020) words:

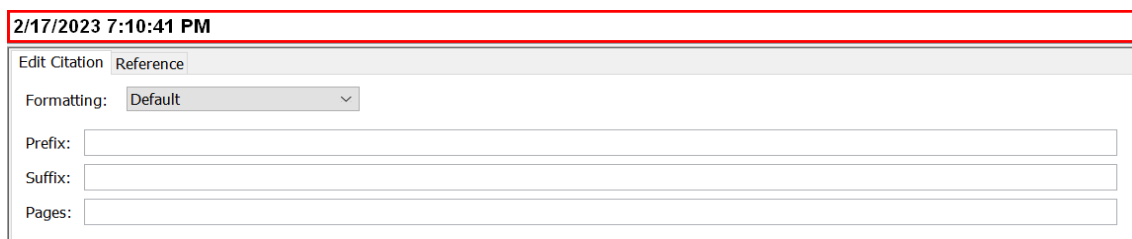
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If a quotation contains 40 words or more, treat it as a block quotation. Do not use quotation marks to enclose a block quotation. Start a block quotation on a new line and indent the whole block 0.5 in. from the left margin. (p. 272)

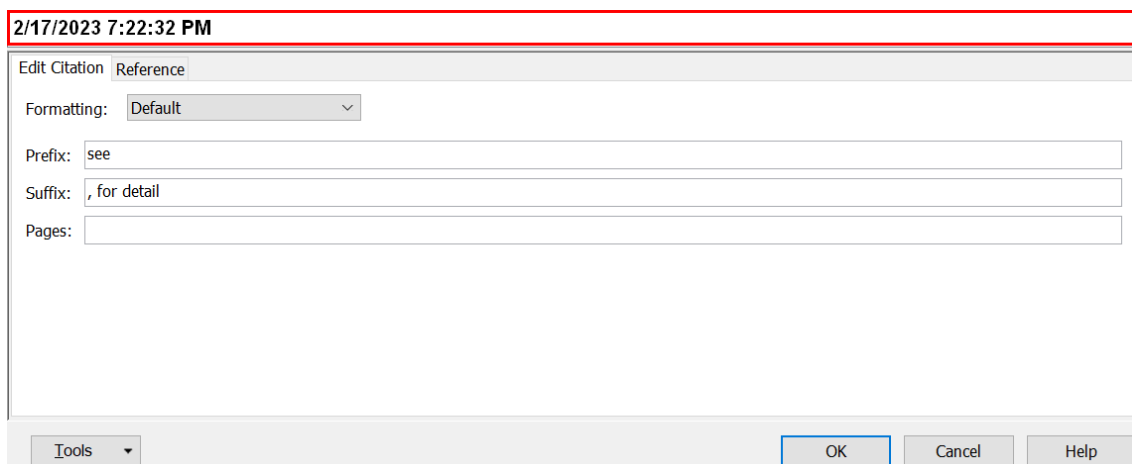
Note that the page number of the block quotation is given after the punctuation at the end of it, and no full stop is given after it.

Citation With Prefix and Suffix:

We can add prefix, suffix or both in parenthetical in-text citation as required using EndNote. For example, to add the required prefix or suffix or both, in the citation (Friese, 2012), right-click on it > Edit Citation(s) > More to get the following display:



Then, type the prefix and suffix to be added in the corresponding slots as shown as follows, for example:



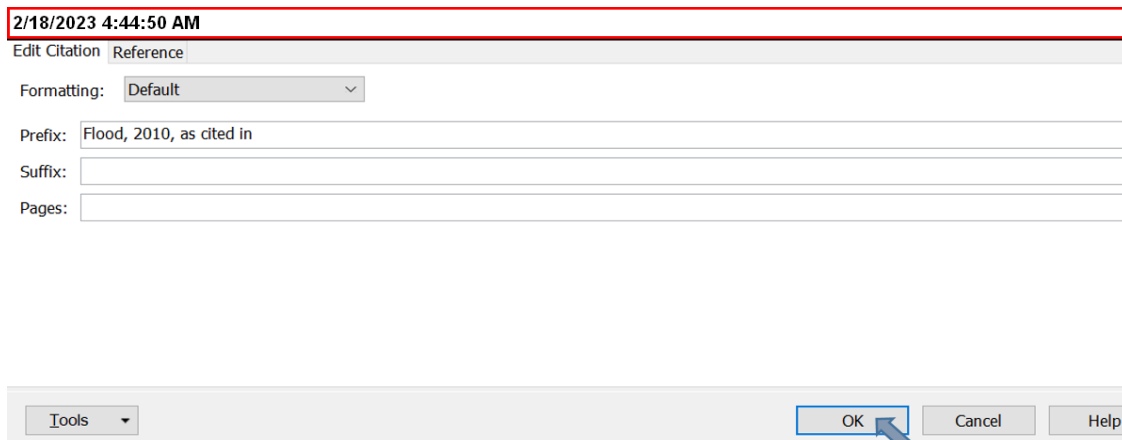
Then click on OK or press enter to get the result as (see Friese, 2012, for detail). Note that while typing the prefix in the slot, we should add one space at the end while the suffix should be preceded by comma plus one space as shown in the above screenshot.

Secondary Source Citation:

It is desirable to cite primary sources as far as possible though secondary sources can be cited sparingly (see APA, 2020, p. 253). We can manage secondary source citation using EndNote using the secondary source citation marker 'as cited in' as prefix element.

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To manage the parenthetical secondary source citation, such as (Flood, 2010, as cited in Hollinger, 2016), manage the citation (Hollinger, 2016) through EndNote and add 'Flood, 2010, as cited in' as a prefix as shown in the following screenshot:

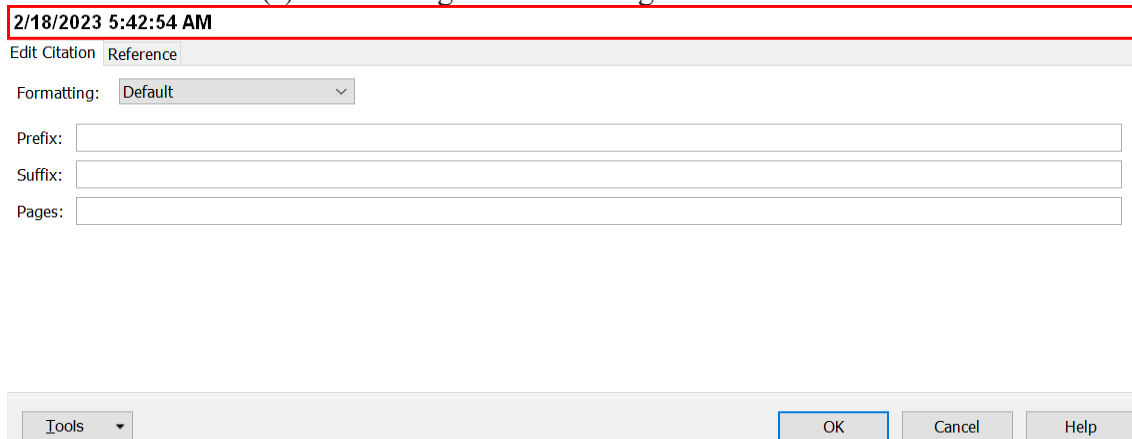


The screenshot shows the 'Edit Citation' dialog box in EndNote. The title bar indicates the date and time: 2/18/2023 4:44:50 AM. The dialog has two tabs: 'Edit Citation' (selected) and 'Reference'. Under 'Formatting', a dropdown menu is set to 'Default'. The 'Prefix' field contains the text 'Flood, 2010, as cited in'. The 'Suffix' and 'Pages' fields are empty. At the bottom, there are 'Tools', 'OK', 'Cancel', and 'Help' buttons. A blue arrow points to the 'OK' button.

We can manage the narrative citation of secondary source such as Passy (1899; as cited in Kelly, 1969), by putting Passy manually before the citation (Kelly, 1969), and adding '1899; as cited in' as a prefix to it.

Citation of Webpage and Newspaper Article:

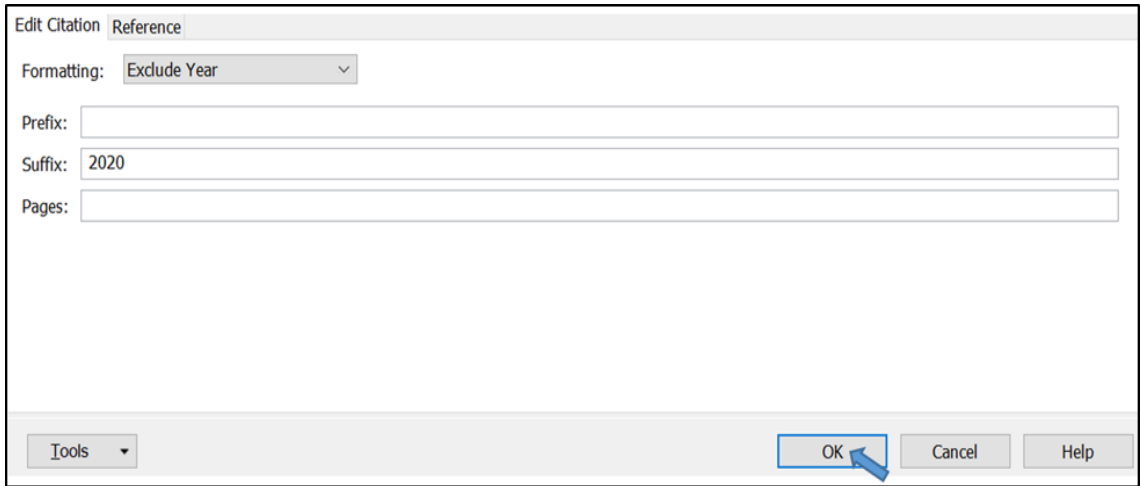
The process of managing the citation of webpages and newspaper articles is same since the end-text citations of both the types of source include the Year, Month, and day while their in-text citations include only the year of publication. Let us take an example of a webpage with its end-text citation as Nordquist, R. (2020, February 12). *Home language*. <https://www.thoughtco.com/what-is-home-language-1690930>. The default EndNote in-text citation corresponding to this reference citation appears to be (Nordquist, 2020, February 12) which should be changed into (Nordquist, 2020). We can manage this by excluding the year with month and day, and adding the year as a suffix. For this, right-click on it > Edit Citation(s) > More to get the following window:



The screenshot shows the 'Edit Citation' dialog box in EndNote. The title bar indicates the date and time: 2/18/2023 5:42:54 AM. The dialog has two tabs: 'Edit Citation' (selected) and 'Reference'. Under 'Formatting', a dropdown menu is set to 'Default'. The 'Prefix', 'Suffix', and 'Pages' fields are empty. At the bottom, there are 'Tools', 'OK', 'Cancel', and 'Help' buttons.

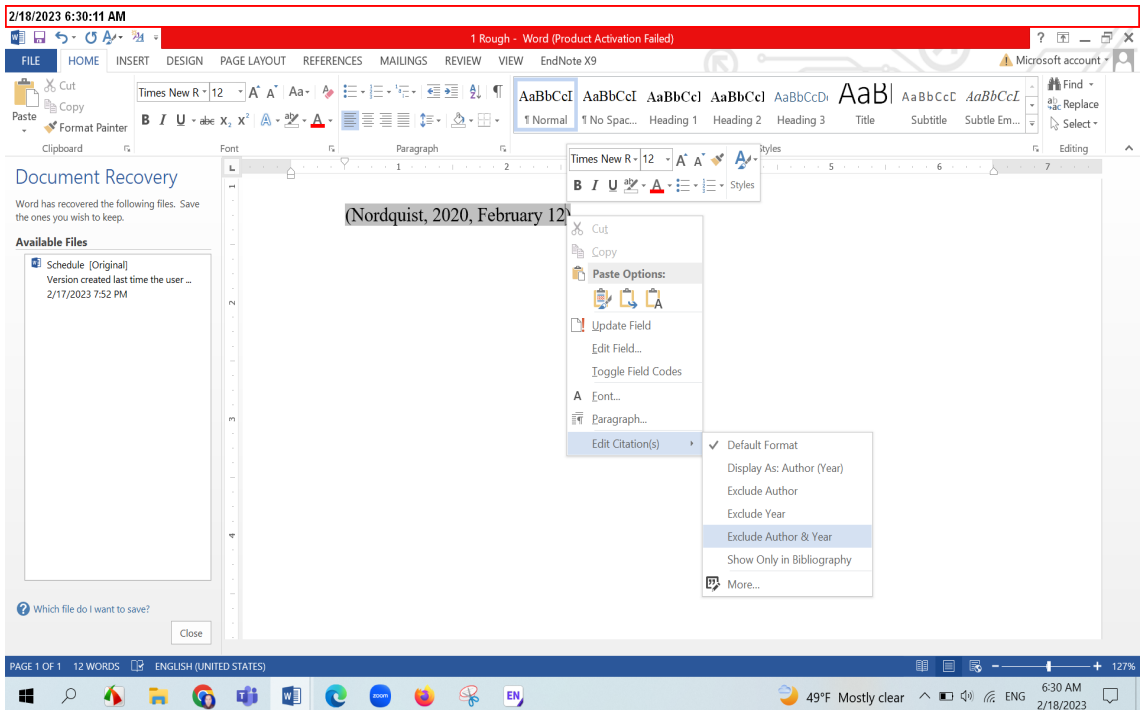
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Then, edit the fields as shown below, and click on OK to get the intended result as (Nordquist, 2020).



The screenshot shows the 'Edit Citation' dialog box in EndNote. The 'Reference' tab is active. The 'Formatting' dropdown menu is set to 'Exclude Year'. The 'Prefix' field is empty. The 'Suffix' field contains the text '2020'. The 'Pages' field is empty. At the bottom right, the 'OK' button is highlighted with a blue arrow, indicating it should be clicked to apply the changes.

To add the citation in narrative format, we can type the required format before the default citation and exclude the author and year both from it so that the end-text citation does not disappear from the reference list. For example, when I type Nordquist (2020) before the default citation as Nordquist (2020) (Nordquist, 2020, February 12), and right-click the default citation > Exclude Author & Year as shown in the following screenshot:



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the narrative in-text citation along with its end-text citation is appropriately managed.

Ambiguous Citation:

The use of EndNote disambiguates all sorts of ambiguous citations that the manual citation may result in. Just for the disambiguation of one sort of ambiguity, if two or more works with the same author(s) and same date are cited using EndNote in a piece of writing, they are automatically disambiguated by adding different suffixes: a, b, c, and so on to the date of publication in the alphabetical order of the titles of the work as per the APA format of citation. For example, when I cited Sharma's work published in 2019, using the EndNote library, the citation appeared to be as follows:

2/18/2023 1:07:53 PM

(Sharma, 2019)

Sharma, U. N. (2019). Home language use for English language teaching-learning: Theoretical perspectives. *Education Quarterly*, 3(1), 117–130.

However, when I cited another work of the same author with the same date of publication, the citations of the two works appeared to be:

2/18/2023 1:25:04 PM

(Sharma, 2019a)

(Sharma, 2019b)

Sharma, U. N. (2019a). Home language use for English language teaching-learning: Theoretical perspectives. *Education Quarterly*, 3(1), 117–130.

Sharma, U. N. (2019b). A seed of schooling that grew into a tree of M. Phil. *Sikshak Journal*, 14(14), 22–28.

Note: *A*, *an*, and *the* are ignored in alphabetizing.

One more interesting fact I have experienced is that such disambiguation is maintained irrespective of the textual distance between the two in-text citations. That is to say, any citation manually ambiguous to an earlier one changes the earlier citation as well irrespective of its location within the text to disambiguate the two. This is equally applicable to other sorts of ambiguous citations, such as citations of multiple works by the authors with same surname, citations of multiple works with same surname and initials, and so on.

Conclusion:

Based on the aforementioned discussion of my personal experience with using EndNote for managing in-text citations, it becomes evident that EndNote effectively handles various types of in-text citations, accompanied by their corresponding end-text citations, through a systematic approach. Although minor manual adjustments might be required for specific citation types, the overall process remains streamlined. This discovery leads to the conclusion that EndNote not only organizes but also expedites the sourcing of references, consequently enhancing the efficiency of academic writing as a whole.

Furthermore, drawing from my firsthand encounters with employing EndNote during the writing process, it becomes apparent that constructing references within the EndNote library serves as a foundational step before commencing the actual content creation. This underscores the necessity of mastering EndNote's usage skills prior to embarking on any academic endeavor, whether it involves formulating a research proposal, conducting a study, or preparing a comprehensive report.

In addition, the findings underscore that the utilization of EndNote not only expedites and structures the academic writing journey but also emerges as an almost indispensable tool for maintaining citation accuracy, particularly in works encompassing a substantial array of references.

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