EndNote Desktop: Format a Citation

To format a citation that has been inserted into a Word document, first click on the in-text citation to select it, then click on the “Edit & Manage Citation(s)” button in the EndNote X8 menu tab.

A dialog box will open. Make sure the reference you want to format is selected in the upper window. In the lower window, make sure the “Edit Citation” tab is selected. Enter additional information as needed to complete the citation, for example, page numbers for quotations. [Note: Do not add “p.” or “pp.” for page numbers, as formatting is automatically inserted by EndNote in accordance with the specified style.] Click the “OK” button when finished.

The appearance of edited information will vary depending upon the citation style that is active for the document.
Sometimes it is desirable to modify what information is displayed within (or outside) the inserted citation, such as when author names are to be included in the text of sentence being referenced. To modify a citation after it has been inserted, click on the in-text citation to select it, and then click the “Edit & Manage Citation(s)” button.

Make sure the correct reference is selected in the upper window of the dialog box. On the “Edit Citation” tab in the lower window, click the dropdown arrow to the right of the “Formatting” option (where it says “Default”) and select the appropriate format. In this example, select “Display as Author (Year)” and click the “OK” button when finished. Note the other available format options.

The citation format is changed within the Word document.

Note: Using the “Edit & Manage Citation(s)” button to modify the appearance of in-text citations rather than manually editing the citation within Word serves to maintain the connection between the in-text citation and the reference within the bibliography section of the document. This makes the insertion and deletion process easy to manage and change as needed with each document revision.