CUSTOMIZING ENDNOTE FOR IEEE STYLE: INSTRUCTIONS FOR WORD AND LATEX USERS

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Overview

The default EndNote output does not contain the required reference types for the IEEE standard. Furthermore, the format of the output styles does not match the IEEE standard. Provided below are the steps to modify both these facets. The purpose of this document is to provide an exact list of steps to perform to achieve the EndNote setup that we found to be optimal.

Reference Types

As previously mentioned, the EndNote output styles do not match those of the IEEE standard. Furthermore, each reference type has a unique set of input fields. The input fields for each of the reference types is provided in the 'Fields-For-Reference-Types.xls' file. The reference types and their input fields can be exported and imported in EndNote. The configuration for the IEEE standard is provided in 'Reference_Types_GT_OL.xml'.

To import the new reference types and their respective input fields, follow the steps given below:

1. From the navigation header click 'Edit' and select 'Preferences'.
2. A mini window should popup titled 'EndNote Preferences'.
3. Select 'Reference Types' from the list on the left. You should now see a subsection titled 'Reference Type Table' .
4. Click 'import' and choose the 'Reference_Types_GT_OL.xml' file.

This should change the list of reference types available to EndNote and their respective input fields.

A complete list of all 25 primary and secondary reference types is given below.

Table 1 Primary reference types needed in engineering writing. (25 types)

Book	Grant
Book Chapter	Instruction Manual
Book Section	Issued Patent
Company	Journal Article
Conference Paper	MS Thesis
Dataset	Patent Application
Datasheet	Patent Publication
PhD Thesis	Software
Preprint Article	Standard
Provisional Patent Application	Trade Journal Article
Record of invention	Web-page Article
Report	Newspaper Article
Roadmap	

Table 2 Secondary reference Types that are needed in engineering. This are implemented within the Miscellaneous Universal Reference Type (19 types)

Accepted Paper	Personal Communication
Application Note	Podcast
Associations	Poster
Blog Post	Press Release
Boards	Programs
BS Thesis	Seminar

Computer Program	Unpublished Work
Conference Presentation without proceedings	Video
Legislative Action	Webinar
Manuscript	

The secondary reference types listed above are examples of reference material that are needed in engineering but are not covered by the primary list in Table 1. Any other reference material the EndNote user believes is not covered by the primary reference types must be cited under the miscellaneous universal reference type.

Miscellaneous Universal Reference Type

The miscellaneous universal reference type allows the user to reference material that is not covered by the primary reference types (Refer to Table 1 above). This includes B.S Thesis, Computer Program, manuscript, etc... (Refer to Table 2 above). The miscellaneous universal type contains just one required field entry – Reference Entry. The user must enter the complete citation for the material in IEEE style into this field, and EndNote will export the citation as entered. Note that the 'Reference Entry' field will not be typically displayed in the EndNote library window. Hence, optional fields are added to help the user identify the reference as they view it in their EndNote library window. The optional fields include Author, Year, Title, and Secondary Reference Type, and information entered in these fields will not be contained in the exported reference.

Reference Styles

The format of an exported reference can be changed by modifying the 'EndNote style file' for that output style. Changing this style file changes how a certain reference type will look when exported from EndNote. Two style files were modified to better reflect the IEEE standard and are provided as 'BibTex_Export_GT_OL.ens' and 'IEEE_GT_OL.ens'. To import these new styles, follow the following documentation: https://support.clarivate.com/Endnote/s/article/EndNote-Install-Additional-Output-Styles?language=en_US

The steps have also been included here:

Installing the style into **EndNote X2 and later:**

1. In Windows, or using your macOS Finder, browse to the location where you downloaded the style. Double-click on the style file to open it. It should open in the EndNote program.
2. In EndNote, go to the "File Menu" and choose "Save as."
3. Click the Save button.
4. Click on the "File Menu" and choose "Close Style."
5. [Optional]: To update an existing document with this style, see EndNote: Changing Output Styles Within a Document.

Author Names with suffixes

EndNote's default naming format dictates how an entered name appears in the reference export. This format doesn't export suffixes correctly. It recognizes suffices such as Jr. and Sr. as surnames, leaving room for error. This issue was addressed by changing the EndNote settings and should be reflected when both the style files were imported.

To ensure that any authors with suffixes are appropriately formatted, the following must be done:

1. Find any authors with suffixes.
2. Cut the surname and suffix and paste them in front of the maiden name.
3. Add a comma after the suffix.

An example is provided below:

John Doe Jr. -> Doe Jr., John

Appendices

Appendix A- Older EndNote Versions

Installing the style into **EndNote 8, 9, X, or X1:**

1. Using Windows, or using your macOS Finder, browse to the location where you downloaded the style. Right-click on the style file and select Copy.
2. Browse to your EndNote Styles folder. This will typically be in following location:
   Windows: C:\Program Files\EndNote #\Styles (Where # is the version number for EndNote)
   macOS: Applications\EndNote #\Styles (Where # is the version number for EndNote)
   Note: If you modify the EndNote preferences, you can set this to another location. To check this setting, go to the "Edit" menu or EndNote menu on the Mac and select "Preferences." Click on the Folder Locations option to see the custom Style folder location and modify as needed. Keep in mind that the default location for the Styles folder may cause problems when trying to save or edit in Windows Vista, 7, 8, and 10 with versions prior to **EndNote X2**. Please see EndNote: Problems saving Styles for more information on this issue.
3. Right-click in this folder and choose Paste. Your style should now be installed in the *EndNote* program.

[Optional]: To update an existing document with this style, see EndNote: Changing Output Styles Within a Document.