

Using Footnote Styles with Reference Managers

- Reference managers have a variety of different ways of handling footnote citation styles.
- Footnote styles can be more complex to work with in reference management software and may require additional set-up or steps to work correctly.
 - RefWorks and EndNote require you to manually use Microsoft Word's insert footnote tool followed by using the reference manager to add a citation. This can make it more difficult to switch to an author-date style should you change your mind about which style you wish to use later. This is because the reference manager is unable to automatically update the footnotes added by Word.
 - Zotero can add footnotes and citations in a single step without having to use Word's insert footnote tool separately. This makes it much easier to switch to an author-date style should you need to. Word does recognise the footnotes added by Zotero so you can still use other footnote functions (such as jump to next/previous footnote) in Word.
- Be aware that some citation styles have an author-date and a footnote variation. Be sure to choose the footnote version.

Endnote

- Endnote requires you to use the footnote functions in Microsoft Word combined with a footnote referencing style e.g. Chicago 16th Edition
- EndNote will automatically apply style rules to the footnotes. For example, Ibid and short versions of titles will be substituted when appropriate as in the example of Chicago 16th edition given below.

¹ C. Andrews, "Bbc Micro: Bit a Little Bit Too Late?," *Engineering and Technology* 11, no. 4 (2016).

² Ibid.

³ Tracy A. Gardner, Elbrie De Kock, and Lewis Carroll, *Micro:Bit in Wonderland : Coding & Craft with the Bbc Micro:Bit*, Microbit in Wonderland (Eastleigh, Hampshire?: Tech Age Kids, 2018).

⁴ Andrews, "Bbc Micro: Bit a Little Bit Too Late?."

Steps:

1. Choose the footnote style you wish to use from the 'Style' menu on the EndNote 20 tab on the Word ribbon.
2. Place your cursor at a point in your Word document where you wish to add a citation.
3. On the 'References' tab in the Word ribbon, click 'Insert Footnote'. A footnote will be created for you at the bottom of the current page.
4. Place your cursor in the footnote at the bottom of the page.
5. Select the EndNote 20 tab on the ribbon and click the 'Insert Citation' button.
6. Using the box that appears, find and select the item you wish to cite.

7. EndNote will add a citation within the footnote and also add a bibliography entry at the end of your document. If you want this bibliography to appear on the last page of your manuscript, use Word to insert a page break directly before the bibliography.

RefWorks

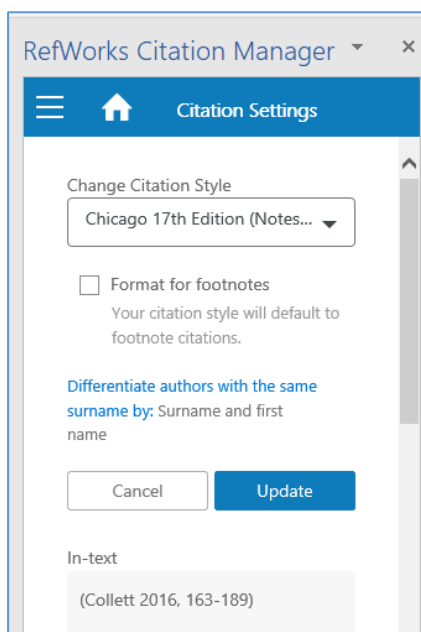
- RefWorks requires you to use the footnote functions in Microsoft Word combined with a footnote referencing style e.g. Chicago 17th Edition
- Titles are shortened automatically for repeated references in Chicago 17th edition, as below. If you are using a style which requires *ibid.*, you may find RefWorks does not insert this correctly and instead shortens titles. There is not currently a solution to this, so if you need to use *ibid.*, consider using a different reference manager.

¹ Joseph J. López, Katherine J. Deans and Peter C. Minneci, "Nonoperative Management of Appendicitis in Children," *Current Opinion in Pediatrics* 29, no. 3 (June, 2017), 358-362. doi:10.1097/MOP.0000000000000487. <https://www.ncbi.nlm.nih.gov/pubmed/28306630>.

² López, "Nonoperative Management of Appendicitis in Children," , 358-362

Steps:

1. Open up RefWorks Citation Manager within Microsoft Word.
2. In the RefWorks Citation Manager, ensure that you have selected a suitable footnote style.
3. From the menu in the RefWorks Citation Manager, choose the 'Format for Footnotes' option. Not all citation styles offer a footnote version, in which case you will see a note explaining that the format only supports in-text citations.



4. Place your cursor at a point in your Word document where you wish to add a citation.
5. On the 'References' tab in the Word ribbon, click 'Insert Footnote'. A footnote will be created for you at the bottom of the current page.
6. Place your cursor in the footnote at the bottom of the page.

7. In the Refworks Citation Manager, find the source you wish to cite. Move your mouse over the reference you want and click the 'Cite This' button.
8. RefWorks will add a citation within the footnote and also add a bibliography entry at the end of your document. If you want this bibliography to appear on the last page of your manuscript, use Word to insert a page break directly before the bibliography.

Zotero

- Zotero is able to add footnotes and citations in a single step, without requiring you to insert a footnote element first using Microsoft Word.
- Be aware that there are many variations of popular footnote styles available in Zotero, in particular 'full-note' variations will include full titles in footnotes followed by abbreviated titles for subsequent references. 'note' variations will only ever show short titles in the footnotes.
- Zotero will automatically apply style rules to the footnotes. For example, Ibid and short versions of titles will be substituted when appropriate as in the example of Chicago 16th (full-note) edition given below.

¹ M. J Benton, *Vertebrate Palaeontology*, 3rd ed. (Malden, Mass.: Blackwell, 2005).

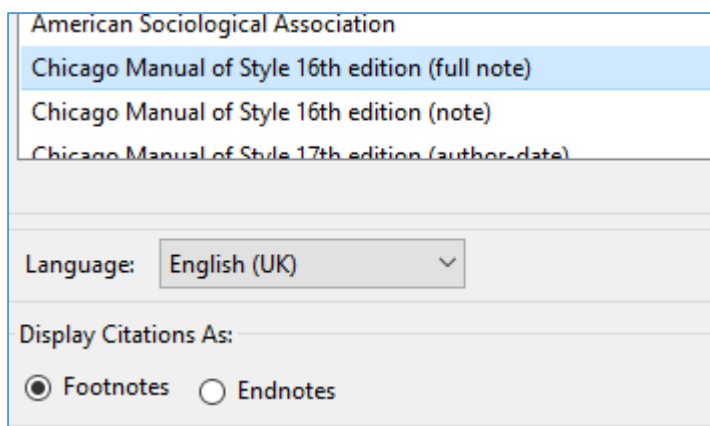
² Ibid.

³ Karyn D. Rode et al., 'Nutritional Ecology of Elephants in Kibale National Park, Uganda, and Its Relationship with Crop-Raiding Behaviour', *J. Trop. Ecol.* 22, no. 4 (2006): 441–49, doi:10.1017/S0266467406003233.

⁴ Benton, *Vertebrate Palaeontology*.

Steps:

1. Begin by using the Zotero desktop application to select the footnote referencing style you wish to use.
2. From the Zotero tab on the ribbon in Microsoft Word, click the 'Document Preferences' icon. Using the box that appears, ensure that the style you wish to use for your current document is selected and that the 'Display Citations As' option is set to 'Footnotes'.



3. Position your cursor at the point in your document where you wish to a citation.
4. Click the 'Add/Edit Citation' button in the Zotero tab on the Microsoft Word ribbon.
5. Use the Zotero search bar that pops up to find and select the document you wish to cite.
6. Zotero will then add a footnote and citation to your document in a single step.

7. For your bibliography; position your cursor at the point your document where you want your full bibliography to appear.
8. Click the 'Add/Edit' Bibliography button in the Zotero tab on the Microsoft Word ribbon. Your bibliography will be added to your document for you.

Mendeley

- Mendeley is able to add footnotes and citations in a single step, without requiring you to insert a footnote element first using Microsoft Word.
- Be aware that there are many variations of popular footnote styles available in Mendeley, in particular 'full-note' variations will include full titles in footnotes followed by abbreviated titles for subsequent references. 'note' variations will only ever show short titles in the footnotes.
- Mendeley will automatically apply style rules to the footnotes. For example, Ibid and short versions of titles will be substituted when appropriate as in the example of Chicago 16th (full-note) edition given below.

¹ K. Mattsson, L. A. Hansson, and T. Cedervall, "Nano-Plastics in the Aquatic Environment," *Environmental Sciences: Processes and Impacts*, 2015, doi:10.1039/c5em00227c.

² Ibid.

³ David K.A. Barnes et al., "Accumulation and Fragmentation of Plastic Debris in Global Environments," *Philosophical Transactions of the Royal Society B: Biological Sciences*, 2009, doi:10.1098/rstb.2008.0205.

⁴ Mattsson, Hansson, and Cedervall, "Nano-Plastics in the Aquatic Environment."

Steps:

1. Using Mendeley Desktop, make sure you have installed the citation style you wish to use.
2. From the 'References' tab in the Microsoft Word ribbon, ensure that the citation style you wish to use is selected from the drop-down 'Style:' menu under the 'Mendeley Cite-O-Matic' section.
3. Position your cursor at the point in your document where you wish to add a citation.
4. Click on the 'Insert Citation' icon under the 'Mendeley Cite-O-Matic' section.
5. Use the search box that appears to find and select the document you wish to cite.
6. Mendeley will add a footnote and the citation to your document in a single step.
7. For your bibliography; position your cursor at the point in your document where you want your full bibliography to appear.
8. Click on the 'Insert Bibliography' button in the Mendeley Cite-O-Matic. Your bibliography will be added to your document for you.