

# EndNote® and Reference Manager® Citation Formats Compared to “Instructions to Authors” in Top Medical Journals

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**ABSTRACT.** The study compared citation format in EndNote® version 7 and Reference Manager® version 11 with the citation format for references found in the instructions to authors from the most significant medical literature. The resulting information should be very useful to those who depend on citation management software to format and organize their references for publication in medicine, and librarians and others who teach the use of citation management software. *[Article copies available for a fee from The Haworth Document Delivery Service: 1-800-HAWORTH. E-mail address: <docdelivery@haworthpress.com> Website: <<http://www.HaworthPress.com>> © 2006 by The Haworth Press, Inc. All rights reserved.]*

**KEYWORDS.** EndNote, Reference Manager, citation format, instructions to authors

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## INTRODUCTION

In teaching and troubleshooting citation management for faculty, staff, and students at Indiana University School of Medicine, one of the most common problems encountered was the need to tweak the output style of both EndNote® and Reference Manager® citation management programs to comply with the authors' instructions as required by the journals. The pervasiveness of the situation motivated the study question.<sup>1</sup> The study results can be used to focus on areas of instruction, particularly on EndNote and Reference Manager output styles.

The purpose of the study was to compare citation format in EndNote version 7 and Reference Manager version 11 with the citation format in instructions to authors for reference requirements and style for articles from select journals of the most significant medical literature.

## METHODS

The study was designed and implemented by librarians at the Indiana University School of Medicine and by a school of library and information science intern with an interest in health sciences librarianship. The study occurred between October 2004 and January 2005, and represents the EndNote version 7 and Reference Manager version 11 databases, and the ISI, MLA, and publisher Web sites during that time. The journal styles were either in the EndNote or Reference Manager program software or in the auxiliary Web Style Finder on the ISI Web site for the respective programs <<http://www.endnote.com/>> or <<http://www.referencemanager.com/>> during the same time period.

To select the top journals across the medical disciplines, the Brandon/Hill Selected List of Print Books and Journals for the Small Medical Library 2003 edition on the MLA Web site was matched to the journals currently indexed in the Abridged Index Medicus (AIM) Journal Titles. To further limit the journals to one in each of the Brandon/Hill subject categories, the Journal Citation Reports database was used to pick the top journal according to Impact Factor. The resulting list was 43 significant journals throughout the field of medicine (see Appendix A).

The instructions to authors had to be the most recent that could be found at the time. There are a number of ways to locate instructions for submitting articles to the various medical journals. One way is through Web sites that collect author instructions; selected sites<sup>2,3</sup> available at the time of this study are listed here:

- “Instructions to Authors in the Health Sciences” is at the Web site of the Raymon H. Mulford Library at the Medical College of Ohio <<http://www.meduohio.edu/lib/index.html>>.
- The NLM Web site has “Uniform Requirements for Manuscripts Submitted to Biomedical Journals” <<http://www.icmje.org/>> and, also, Reference Style and Format examples at <[http://www.nlm.nih.gov/bsd/uniform\\_requirements.html](http://www.nlm.nih.gov/bsd/uniform_requirements.html)>.
- “Instructions to Authors for Elsevier Journals” is a searchable list of Elsevier journal titles with links to instructions to authors.

If the journal was not listed at any of these sites or on its publisher’s Web site, then the January issue, or first issue of the most recent year, was examined to find instructions for authors.

Two titles needed special decisions. The *Journals of Gerontology* had two sub series: Series A, Biological Sciences and Medical Sciences, and Series B, Psychological Sciences and Social Sciences. *Journals of Gerontology* was counted as one title, and as it turned out, neither EndNote nor Reference Manager had styles for this title. The *Journal of Bone and Joint Surgery* had a U.S. and a British version, and the U.S. version was selected for the study.

## **RESULTS**

### ***Journal Titles***

There were 43 journal titles in the study (see Appendix A). The authors’ instructions matched exactly to only four titles (see Table 1).

Of the 43 titles examined, 15 (35%) were not included in the Reference Manager (RM) style list, while 20 (47%) were not included in the EndNote (EN) style list (see Appendix A to identify titles). Of the 21 (~50%) titles not included in either RM or EN, 11 were association publications, four of which were published by the American Medical Association. One title, *Hospital & Health Networks*, did not include instructions to authors in any form (see Table 2).

### ***Discrepancies***

Eleven of the most important style elements were examined and compared for accuracy of the software versus the authors’ instructions. Over-

TABLE 1. Perfect Match of Citation Styles and Author's Instructions

	Journal Title
EndNote	<i>Journal of Allergy and Clinical Immunology</i>
Reference Manager	<i>American Journal of Obstetrics and Gynecology</i>
Reference Manager	<i>Anesthesiology</i>
Both EndNote and Reference Manager	<i>New England Journal of Medicine</i>

TABLE 2. Forty-Three Journals in the Study

	Journal Style Not Included	Journal Style Included
EndNote	20 (47%)	23 (53%)
Reference Manager	15 (35%)	28 (65%)

all, 121 discrepancies were found, with 33% of the differences in EN and 67% in RM. Examples of the discrepancies include:

- “Instructions to Authors” format last name, first initial; software format first name, last name (5 EN; 13 RM).
- Journal name abbreviated in “Instructions to Authors” and not in software (13 EN; 14 RM).
- Issue number not included in “Instructions to Authors” but included in software (3 EN; 4 RM).
- Title of article in “Instructions to Authors” no capitalization except first word but in software capitalization used (5 EN; 12 RM).

Of those journals listed in either software (EN or RM), discrepancies with the journal’s “Instructions to Authors” were as follows: 40 in 8 categories for EN compared to 81 in 11 categories for RM. Four categories—author, title of article, punctuation/spacing, and journal title—accounted for the greatest number of discrepancies. For those teaching EN and RM, the number of discrepancies per category (see Table 3) can direct the instructor to areas for focus particularly for editing output styles.

Both software packages had errors with compound or multiple last names, for example: van Allen. Both provide straightforward guidelines for handling compound or multiple last names. In EndNote, the process is to put the compound or multiple last names first in the author field followed by a comma and the remainder of the name including suffixes such as “Jr.” and even degrees such as “Ph.D.” Similar careful rule

TABLE 3. Discrepancies Per Category

Categories	Discrepancies: EndNote	Discrepancies: Reference Manager
author	10	19
title of article	5	14
punctuation (comma, period, colon)	3	10
year	2	3
month	0	3
day	0	1
pagination (continuous)	2	4
volume	0	3
issue	3	5
citation within text (bracket, number)	3	3
journal title cited	12	16
Total:	40	81

following in Reference Manager should produce the desired results. The root of this high statistic is likely caused by “bad data in, bad data out.” Users need to know the guidelines for entering authors, which can be found easily by clicking Help in both software packages. Also, users need to check imported records for correctness, especially of compound or multiple last names. Examples of correct entry of the author field are:

Correct author field in EndNote: Bartlow-Jones, Gene A., Jr., Ph.D.

Correct author field in Reference Manager: de Gaulle, Charles

### **CONCLUSION**

Despite numerous discrepancies (only four exact matches) between the instructions provided by the publisher and those from the software, both products are useful for preparing references for publication. Most of the discrepancies were minor in nature and fixable by using the software features for editing output styles.

Of the titles studied that were not in RM or EN, almost half (11 titles) were association publications (see Appendix B). As members of these associations become aware that their associations could participate in the RM and EN templates, they could suggest to their associations to fill out the Web forms for being part of EndNote and Reference Manager.

The discrepancies were predominately in the authors and journal titles, so it is especially useful to double check this part of the references for adherence to the authors' instructions. The discrepancies in Table 3 can be used by those teaching EN and RM to focus areas of instruction particularly for editing output styles. The resulting information should be very useful to those who depend on citation management software to format and organize their references for publication in medicine, and to librarians and others who teach the use of citation management software.

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## APPENDIX A

## Journals Studied: 43 Top Medical Journals

Journal Name	EndNote Discrepancies Studied	Reference Manager Discrepancies Studied
<i>ACP Journal Club</i>	N/A*	N/A
<i>AIDS</i>	YES**	YES
<i>American Family Physician</i>	N/A	N/A
<i>American Journal of Clinical Nutrition</i>	YES	YES
<i>American Journal of Human Genetics</i>	YES	YES
<i>American Journal of Obstetrics and Gynecology</i>	YES	YES
<i>American Journal of Public Health</i>	YES	YES
<i>American Journal of Respiratory and Critical Care Medicine</i>	YES	YES
<i>American Journal of Sports Medicine</i>	N/A	N/A
<i>American Journal of Tropical Medicine and Hygiene</i>	N/A	N/A
<i>American Journal of Pathology</i>	YES	YES
<i>Anesthesiology</i>	YES	YES
<i>Annals of Emergency Medicine</i>	N/A	YES
<i>Annals of Surgery</i>	YES	YES
<i>Archives of Dermatology</i>	N/A	N/A
<i>Archives of General Psychiatry</i>	N/A	YES
<i>Archives of Ophthalmology</i>	N/A	N/A
<i>Archives of Otolaryngology–Head and Neck Surgery</i>	N/A	N/A
<i>Archives of Physical Medicine and Rehabilitation</i>	N/A	N/A
<i>Arthritis and Rheumatism</i>	YES	YES
<i>Blood</i>	YES	YES
<i>Cancer</i>	YES	YES
<i>Circulation</i>	YES	YES
<i>Clinical Pharmacology and Therapeutics</i>	N/A	YES
<i>Critical Care Medicine</i>	YES	N/A
<i>Diabetes</i>	YES	YES
<i>Gastroenterology</i>	YES	YES
<i>Hospitals &amp; Health Networks</i>	N/A	N/A
<i>Journal of Allergy and Clinical Immunology</i>	YES	YES
<i>Journal of Alternative and Complementary Medicine</i>	N/A	YES

## APPENDIX A (continued)

<b>Journal Name</b>	<b>EndNote Discrepancies Studied</b>	<b>Reference Manager Discrepancies Studied</b>
<i>Journal of Bone and Joint Surgery (US)</i>	N/A	YES
<i>Journal of Gerontology</i>	N/A	N/A
<i>Journal of Infectious Diseases</i>	YES	YES
<i>Journal of Laboratory and Clinical Medicine</i>	N/A	YES
<i>Journal of Oral and Maxillofacial Surgery</i>	N/A	N/A
<i>Journal of Palliative Medicine</i>	N/A	N/A
<i>Journal of Substance Abuse Treatment</i>	N/A	N/A
<i>Neurology</i>	YES	YES
<i>New England Journal of Medicine</i>	YES	YES
<i>Pediatrics</i>	YES	YES
<i>Radiology</i>	YES	N/A
<i>Sexually Transmitted Diseases</i>	N/A	YES
<i>Urology</i>	YES	YES

\*N/A indicates not in EndNote and Reference Manager.

\*\*YES indicates style discrepancies.



## APPENDIX B

### Publishers of Journals Without Style Templates in RM and EN

[11 are associations (4 are AMA); 3 Mosby; 2 Saunders; 2 Mary Ann Liebert]

*ACP Journal Club*—American College of Physicians  
*American Family Physician*—American Academy of Family Physicians  
*American Journal of Sports Medicine* Sage Publications for the American Orthopaedic Society for Sports Medicine [etc.]  
*American Journal of Tropical Medicine and Hygiene*—Allen Press [etc.]  
*Annals of Emergency Medicine* (In EN only)—Mosby-Year Book  
*Archives of Dermatology*—American Medical Association  
*Archives of General Psychiatry* (In EN only)—American Medical Association  
*Archives of Ophthalmology*—American Medical Association  
*Archives of Otolaryngology Head and Neck Surgery*—American Medical Association  
*Archives of Physical Medicine and Rehabilitation*—W.B. Saunders Co. [etc.]  
*Clinical Pharmacology and Therapeutics* (In EN only)—C.V. Mosby  
*Critical Care Medicine*—Mary Ann Liebert  
*Hospitals & Health Networks*—American Hospital Pub.  
*Journal of Alternative and Complementary Medicine*—Williams and Wilkins  
*Journal of Bone and Joint Surgery (US)* (In EN only)—Boston; *Journal of Bone and Joint Surgery*  
*Journal of Laboratory and Clinical Medicine* (In EN only)—C.V. Mosby  
*Journal of Oral and Maxillofacial Surgery*—W.B. Saunders Co. [etc.]  
*Journal of Palliative Medicine*—Mary Ann Liebert  
*Journal of Substance Abuse Treatment*—Pergamon Press  
*Journals of Gerontology: Series A and B*—Gerontological Society of America  
*Radiology* (RM only)—Radiological Society of North America  
*Sexually Transmitted Diseases* (In EN only)—J.B. Lippincott Co.