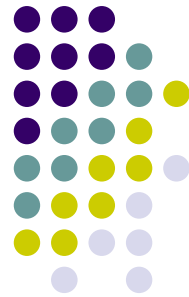


Using EndNote

for Citations and Reference Lists

Leadership Roundtable Conference
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By David Heise





Why do I want it?

- To build a searchable and categorized database of all my references
- To record the bibliographic information required for reference lists
- To import bibliographic information from online searches
- To format and maintain my citations and reference lists in documents I create

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Where can I get it?

Endnote Student Edition 7.0 (just released!)

- Andrews Bookstore - \$109.95
 - Call Ruth on 471-6500 for overnight delivery to Bookstore
- Amazon.com - \$94.99 plus shipping (version 6)
- <http://www.endnote.com/>

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How do I use it?

1. Getting Started
2. Customizing Initial Settings
3. Entering Data Manually
4. Importing Data
5. Searches
6. Advanced Topics



1. Getting Started

- What is EndNote?
- The Guided Tour
- Installing the macros and toolbar



- What is a library?
- What is a “Reference Type”?
- Create a Library

What is EndNote? the complete reference solution!

- EndNote is an online search tool—it provides a simple way to search online bibliographic databases and retrieve the references directly into EndNote. EndNote can also import data files saved from a variety of online services, CD-ROMs, and library databases.
- EndNote is a reference database and image database. It specializes in storing, managing, and searching for bibliographic references in your private reference library. Now you can organize images including charts, figures, and equations with a caption and your own keywords.
- EndNote is a bibliography maker and manuscript maker. It formats citations and figures in Microsoft Word with the Cite While You Write technology. Watch the bibliography and figure list appear as you insert citations in your manuscript. New Microsoft Word templates guide you through the exacting manuscript requirements of publishers.

You can also create bibliographies using RTF Document Scan with other word processors.

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The Guided Tour

This short seminar can only show you some of the features of EndNote. To become **proficient** in using the software, you must **practise** using the software. The EndNote documentation includes a Guided Tour that is well worth taking. I have included the Demo Version 7 Guided Tour on the session website, as well as some good “getting started” tip sheets, taken from the EndNote website.

Installation

When you install EndNote, you will get a new toolbar in Microsoft Word supported by some macros.

Show the new toolbar

- Find Citation(s)
- Go to EndNote
- Format Bibliography
- etc

What is a Library?

An EndNote **library** is a collection of references, each containing the information required to create a bibliography. Additional information such as keywords, notes, and abstracts can also be stored in these references. In addition to the reference data, the library contains indexes that are used to speed searching and sorting, and Term Lists, which facilitate the entry of commonly used words.

References in the library are organized into fields. The fields that appear in a reference are determined by the reference type.

- Each reference in a library can contain up to 64,000 characters, and any field can contain up to 32,000 characters.
- There is no limit to the number of libraries you can create.
- Libraries can be set as “default libraries” that open automatically when EndNote is started.
- You can have more than one library open at a time.
- Libraries created with EndNote on one platform (Macintosh or Windows) can be used with EndNote on any other platform.
- Each library is a separate file that can be independently moved, copied, renamed or deleted.
- Your library can contain images, which are stored in a [library name].DATA folder that is placed in the same folder as your library.

Important! Each EndNote library can reach a maximum size of 32 MB or a maximum record number of 32,767 (whichever comes first). Once a record number is assigned, it cannot be used again in that library. So, if you import 30,000 records, then delete all but 1000 of them, you cannot enter even 3000 more records into that particular library. When importing records, we recommend that you import into a temporary new database, determine which ones you want to keep, then move those records into your permanent library.

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Reference Types

What is a Reference Type?

Your EndNote library can contain references from a variety of different sources, such as books, journal articles, and newspaper articles. We call these different sources **reference types**. EndNote provides built-in forms for these and other common reference types.

In addition to an all-encompassing “Generic” reference type, EndNote has three unused reference types and 25 pre-defined reference types: Journal Article, Book, Book Section, Manuscript, Edited Book, Magazine Article, Newspaper Article, Conference Proceedings, Thesis, Report, Personal Communication, Computer Program, Electronic Source, Audiovisual Material, Film or Broadcast, Artwork, Map, Patent, Hearing, Bill, Statute, Case, Chart or Table, Figure, and Equation. See: Default Reference Types for a table of reference types and fields.

Important Points About Reference Types

- You can assign a particular reference type to each reference entered into your library.
- The Reference Types table, accessible through EndNote's Preferences, determines which fields are available for each of the different reference types.
- The Reference Types table allows up to 29 different types of references, each capable of supporting up to 40 fields.
- Of the 29 reference types, all but the Generic type can be modified.
- Use the Reference Types table to add, delete, or rename fields. You can also add or remove complete reference types.
- The layout of the Generic reference type should be used as a guide when modifying or creating reference types. *Rows reserved for Authors should only be used for names.*
- Changes made to the Reference Types table are stored in the Windows system registry. They apply to all libraries opened on that computer.
- If you move your library to a different computer, your references will follow the layout of the Reference Types table on that computer.
- *Do not enter reference data into the Reference Types table.* This table is designed to store just the names of the reference fields.

Reference Types and Data Entry

The chosen reference type specifies which fields appear in the Reference window. For instance, an EndNote journal article reference includes the fields "Journal," "Volume," and "Issue," while a book reference includes fields such as "Publisher" and "City." The Reference window only displays the fields that are relevant to the chosen reference type.

It is best to select the reference type before entering the bibliographic information in a reference. However, you can change the reference type of a reference at any time using the Reference Type menu list at the top of the Reference window.

Relationship Between Reference Types and Styles, Filters, and Connections

Styles, filters, and connection files can include templates for all of the different reference types. This enables various types of references to be formatted differently in a bibliography or imported differently, as necessary.

The reference types and fields available to you when editing a style, filter, or connection file depend on how the reference types are configured in the Reference Types table. These files update automatically to reflect changes made in the Reference Types table (such as changing the name of a field).

Customizing Reference Types

The Reference Types table displays all available reference types and the fields that each reference type contains. Use the Reference Types table to add, remove, or rename fields—or to add a completely new reference type.

To access the Reference Types table:

1. From the *Edit* menu, choose Preferences.
2. Click the *Reference Types* option in the list of preferences.
3. Click the *Modify Reference Types* button and the Reference Types table will open.

The *Modify Reference Types* command is enabled only when all Style, Filter, Connection, and Reference windows are closed.

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Create a Library (demonstrate all these steps)

1. In the EndNote drop-down **File** menu, choose **New...**
2. Choose a directory and a file name in the Do **not** use the default location in **Program Files** – place it somewhere in **My Documents**.



2. Customizing Initial Settings

- Set the default Library
- Set default Reference Type
- Create Custom Fields
- Set display font size
- Set columns to display
- Sorting the library entries

Set the default Library (demonstrate all these steps)

1. Drop-down menu **Edit** -> **Preferences**.
2. Select **Libraries** in the list on the left.
3. Click **Add Open Libraries** then click **Apply**.

Set default Reference Type

1. While in **Edit Preferences**, click on **Reference Types** in the list on the left.
2. From the **Default Reference Type** drop-down box, choose **Book** or **Journal Article** or the type you will use most often and click **Apply**.

Create Custom Fields

1. With **Reference Types** still selected, click the **Modify Reference Types** button.
2. Scroll down to **Custom 1**.
3. For each Reference Type this will apply to, type in the name of the custom field.
4. Click **OK** when done.

Custom fields I use:

Two important custom fields that I use quite a lot are **Shelf** and **Competence**

- **Shelf** – The category of book in my bookcase. I have one for IT books and one for Leadership books. I use EndNote and Word to print a catalog of books I should have in my bookcase, arranged by title and year, and this is helpful from time to time to check that I can account for all my books.
- **Competence** – This field is absolutely vital for building the reference lists for the competencies and for the dissertation. I can tell Endnote to list all the entries in my database for competency 4(c), copy the selected entries into Word, and it formats the Reference List for me.
- A new feature in EndNote is 7 allows printing bibliographies by subject, which should be helpful in both these cases.

Set display font size

1. While in Edit Preferences, click on **Display Fonts** in the list on the left.
2. Click both **Change Fonts** buttons and change font size to 10 and click **Apply**.

Set columns to display

1. While in Edit Preferences, click on **Display Fields**.
2. In Column 4, select **Record Number** (or choose some other field).
3. In Column 5, select a **Custom field** if you have added one and want to display it. I show **Competence** in the display.
4. Click **OK**.

Sorting the library entries

(See the EndNote help under the Contents tab for The Library Window heading, and The Library Window Sort Order topic.)

1. In the main library window, click on the column name you want to sort on, and the library will appear sorted on that column.
2. Click it again to reverse the sort order.



3. Entering Data Manually

- Adding a new reference
- Rules on author and editor names
 - General Rules
 - Using “et al.”, etc.
 - Anonymous works
 - Corporate authors
 - Complex author names

There is a wealth of material in the online help under the Contents tab, Entering and Editing References heading. [Demonstrate this.](#)

To add a new reference to an open library:

1. From the References menu, choose New Reference. This opens an empty Reference window.
2. Choose a reference type from the Reference Type list at the top of the window.
3. Enter bibliographic data into each of the fields in the Reference window. When you are finished, close the reference to save it and add it to the library.

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Rules on Entering Author & Editor Names

The following information about Author and Editor fields applies to the following “Generic” field names: Author, Secondary Author, Tertiary Author, and Subsidiary Author.

General rules

- Author and editor names must be entered **one name per line.**
- Author names can be entered either with the last name followed by a comma and the first name, or the first name followed by the last name. Both are correct but if you have the “Suggest Terms as You Type” feature turned on, EndNote suggests author names based on the assumption that the names are being entered with the last name first.
- EndNote can abbreviate first and middle names, so for maximum flexibility enter whole names whenever possible. If you are entering initials instead of full names, be sure to type a period or a space between initials, (for example “Fisher, J.O.” or “J O Fisher”), otherwise EndNote interprets the initials as a single name: “Jo.”

Using “et al.” or Similar Abbreviations:

Enter all author names for a particular reference. EndNote will truncate the list of authors with “et al.” or “and others” as required by the bibliographic style. If you do not know all of the authors’ names, then the last author should be “et al.” or “and others” followed by a comma.

Anonymous Works:

If a reference has no author, leave the Author field blank. The style that you use to format the bibliography determines how anonymous references are treated.

Corporate Authors:

When entering corporate authors, put a comma after the name. Be sure that you do not have any commas in the name because all text before the comma is interpreted as a last name.

U.S. Department of Agriculture,

Apple Computer Inc.,

Complex Author Names:

For multiple-word last names, like Charles de Gaulle, enter the name with the last name first, such as, "de Gaulle, Charles".

Enter authors with titles, such as “Jr.” or “III”, as Last, First, Title. For example, “Alfred Smith Jr.” must be entered as, "Smith, Alfred, Jr." See the Sorting section of the EndNote preferences if you do not want EndNote to include prepositions (such as de, van, von, etc.) when it alphabetizes references in a bibliography.

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4. Importing Data

- Chose an online database
- Perform a search
- Tag the records of interest
- Click Export if it is available for direct import
- Else click E-mail and import via a filter

- EndNote can connect directly to many online databases but you will be connecting via the University's Library web site, which handles the authentication for you. So you may not be able to use some of EndNote's direct import features.
- However, sites such as OCLC FirstSearch can export directly to EndNote.
- Otherwise, you can email the selected records to yourself and EndNote can import them using one of its many filters.

About EndNote's Import Features

The easiest way to build your EndNote library is to import the references from standard sources such as online bibliographic databases and library catalogs. EndNote can import references from many different sources and formats:

- **Online searching-** EndNote can connect directly to many online databases. You can search the remote database and retrieve the references directly into EndNote.
- **Direct Export-** Many web-based reference databases, including the BiomedNet Evaluated MEDLINE, ISI Current Contents Connect and Web of Science, and Ovid Technologies web databases, support direct downloading of selected references in EndNote-readable format.
- CD-ROM and on-line reference databases- EndNote can import references saved as text files from a variety of reference **databases using customizable import filters.**
- **Standard bibliographic formats-** EndNote can import references from other bibliographic management programs, including Reference Manager and ProCite.
- General-purpose databases- EndNote can **import tab delimited or tagged files** generated by standard database programs.



5. Searches

- Sorting by column
- Typing first letters of sorted column
- <Ctrl>F or click ‘binocular’ icon
- In Word, click ‘magnifying glass’ icon

Demonstrate these.

EndNote search defaults to Any Field Contains <your search text>. But you can also specify the database field and type of match, and you can add other search criteria. Then you select one or more entries in EndNote, copy them to the clipboard (<Ctrl>C), switch to Word (<Alt>1) and paste them into Word (<Ctrl>V). Click the Format Bibliography icon in the EndNote toolbar and choose the bibliography style you want to use (eg APA 5th).

While you are in Word using “Cite While You Write”, you can click on the magnifying glass icon in the EndNote toolbar, and a different kind of dialog box pops up. Highlight the reference you are searching for, and the citation will be inserted and formatted and bibliographic entry will be made automatically.



6. Advanced Topics

- Custom fields
- Customizing import filters
- “Massaging” data files to conform to a filter format
- Customizing output styles
- Subject lists (new, not advanced)

6. Advanced Topics

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Some of these topics are quite detailed and should be tried only after careful reading of the documentation



EndNote Resources

- <http://www.endnote.com/support/ensupport.asp>
- Website for this session
 - <http://www.andrews.edu/leaderpart/RoundTable/Session2/p2/index.htm>
- Leadership Technology Toolkit
 - <http://www.andrews.edu/leaderpart/toolkit.htm>
- Email dheise@andrews.edu

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