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What is EndNote?



EndNote is software that can help you keep track of the sources you use for a library research project: books and book chapters; articles in newspapers, magazines and scholarly journals; web sites; films or videorecordings; artworks; and other kinds of material.

Use EndNote to build your own “library” of references—a database where you can record the bibliographic information (author, title, year, publisher, etc.) for individual sources. Sometimes, you can import references directly into EndNote from research databases and library catalogs, minimizing retyping.

You can use the information stored in EndNote to produce standalone bibliographies or to format citations and Works Cited lists in the research papers you write in Microsoft Word. EndNote formats these citations more or less automatically. (See *Disclaimers*, below.)

EndNote Argot

EndNote has its own special vocabulary. Listed below are terms that will be used in this guide.

Library: a database made up of your sources’ bibliographic data (author, year, title, etc.). Library files end in **.enl**

Reference: individual record in an EndNote library that includes information about a particular source.

Reference Type: denotes what kind of source the reference is. *Examples:* book, book section, journal article, artwork.

Field: part of a reference/record that includes a specific piece of data. *Example:* the “title field” contains the title.

Styles aka Output Styles: helper files that enable EndNote to generate citations according to the rules of a specific citation style. *Example:* *MLA* is a style. Style files end in **.ens**

Style Manager: dialog box allowing you to select styles other than those currently accessible as “favorites.”

Filters aka Output Filters: helper files that enable EndNote to import data from specific databases. Filter files end in **.enf**

Filter Manager: dialog box that allows you to choose the correct filter when importing references from a database.

EndNote Toolbar: appears in Microsoft Word and enables you to cite and format references within a Word document.

Disclaimers – IMPORTANT!

#1 Although EndNote automates much of the process of formatting citations, the program is no substitute for familiarity with the rules of your style guide. You must understand the rules for *how* to cite and *when* to cite in your citation style. You yourself are responsible for the accuracy and honesty of the work you hand in.

For this FYS, we will use the MLA Style. Rules for this style can be found in:

A Writer’s Reference by Diana Hacker:

Ref PE1408 .H2778 2003

The accompanying web site:

<http://www.dianahacker.com/writersref>

MLA Handbook for Writers of Research Papers, 6th ed.: Ref LB2369 .G53 2003

#2 You may need to edit the EndNote-generated citations in your paper to reflect the rules of MLA style. Examples are given later in this guide.

#3 The process of importing references may introduce errors that must be cleaned up for citations to display correctly. Sometimes information may be imported into the wrong fields. Extra punctuation may appear. Imported references should be checked for accuracy and modified if needed. Check the info from an imported reference against your personal examination of the item. Databases can include citation errors. The same goes for items found in other bibliographies.

#4 You may find that EndNote does not format citations for a particular reference type correctly. Please contact Shana with any problems you encounter.

Where Can I Use EndNote?

EndNote is available for you to use on the PCs in the Library's Woolley Electronic Classroom. Wheaton has no site license for EndNote.

You may wish to download a free, fully functional 30-day demo of EndNote 6.0 later on in the semester:
<http://www.endnote.com>

If you download the demo, you will need to install several filter and style files in order for the program to import references from research databases and format citations correctly for your assignments. Contact Shana for information.

Getting Help with EndNote

For EndNote questions, please contact Shana Gass, Reference/Instruction Librarian. Drop by the Reference Desk on the main floor of the Library to ask for her, or contact her at sgass@wheatonma.edu or x3736.


Shana's schedule: Mon-Fri, 9-5pm, with the exception of...
 Tuesday or Wednesday, most weeks: 2-10pm (at Reference Desk 6-10pm)

Other library staff (including Ethel Fraga) may be able to help with EndNote in a pinch, but please plan ahead so there will be adequate time for Shana to get back to you if needed.

EndNote has an **excellent online** help feature. Go to *Help* menu to browse contents or search. You may also consult the PDF manual, in C:\Program Files\EndNote\EndNote6.pdf. Chapter 3 is "*The EndNote Guided Tour.*"

Using EndNote

Opening EndNote

Click on the EndNote icon  on the Windows toolbar or use the *Start Menu* to find the program.

Opening a Library

Doubleclick the library's icon, or open EndNote and Go to *File >> Open >>* find your library and click *Open*.

Creating a New Library

Open EndNote. Go to *File >> New* and name and save new library.

Adding a Reference Manually

Go to *References >> New* or *Control + N*. Select the appropriate reference type (Book, Journal Article, etc.) from the pulldown menu. Type information in each field (or, at the minimum, in at least the fields required by your citation style), *Tabbing* to go to the next field (*Shift + Tab* to move backwards). When done, close the reference window (not the "outer" program window—click the X or *Control + W*) to save the individual reference and add it to your library.

Hints:

For Author and other name fields: Type Lastname, Firstname (followed by initials if any)

Example: Jones, Jenny A.

If multiple names, use *Enter* key to enter one person per line

If a corporate name, insert a comma after the last word

Example: Fellowship of Reconciliation,

Special Fields:

The *Notes* field is a great place for noting down your own thoughts on the source. This is the field that is used for annotations when you select *MLA Annotated* style (use this style for **Assignment #2**).

If you import your reference rather than entering it manually, you may find that you need to omit (or move) odd bits of data from this field before entering your own notes. This field can hold up to 8 pages of single-spaced text.

Keywords field: If you import your references from a database/catalog, you will often find subject headings or other descriptors here. These may be helpful when you go back to the resource to find other similar items.

Additionally, you may want to add your own keywords to help you find particular references later on. These keywords could be subjects (example: “wedding cake”) or task-oriented (example: typing “ILL” for materials that you want to order through Interlibrary Loan). These keywords do not show in your citation, so use them as you see fit.

Abstract field: Use for a summary of the item’s content.

Cautions:

- Sometimes a reference imported from a research database will include the abstract as given in the database.
- While the abstract includes useful information, note that this abstract is only a summary, *not* the full-text of an article. If you are interested in the article, find and read it—do not stop with the abstract.
- Be careful not to use the text of an abstract imported into EndNote as your own.
- Do not use the *Abstracts* field to type your annotations for Assignment #2. Use the *Notes* field instead.

Editing a Reference

When in summary view of references, doubleclick the reference. Move through the fields as needed (*Tab* to move forward, *Shift + Tab* to move backward), editing as normal. Close the reference.

Deleting a Reference

Highlight the reference by clicking on it. *References >> Delete References* or *Control + D*.

Previewing a Citation

Select the appropriate style from the pulldown menu. If your style is not on the list, go to *Edit >> Style Manager* and locate and check the box next to your style. Click *OK*. Go back to the pulldown menu and select the style. When you select a style, EndNote formats your citations according to this style until you alter the selection.

Highlight the reference by clicking it. Click *Show Preview* in the lower righthand corner of the EndNote window. EndNote will display the reference as formatted in the chosen style. This is a good way to check whether all the needed information has been entered correctly, or whether extra punctuation must be removed.

Finding References in Your EndNote Library

You may sometimes want to locate a certain reference or a category of references within your library. Let’s say you want to cite a reference in a paper, or need to select specific references in preparation for creating a standalone bibliography (see below) from a subset of your library.

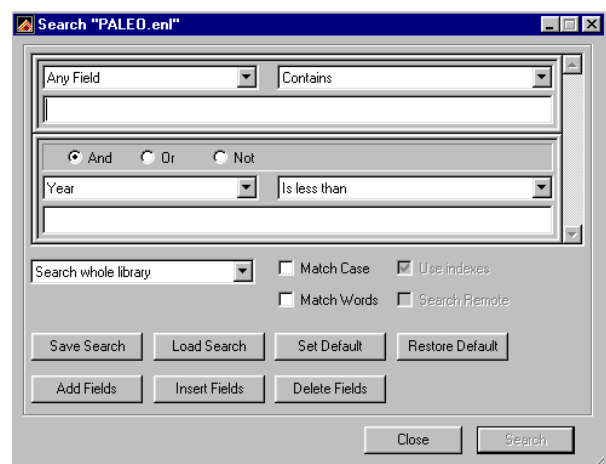
Go to *References >> Search (Control +F)*. You get the search box shown on the right.

Use the pulldown menus to search within particular fields and to choose “contains,” “is,” or greater than/less than logic.

You can select Boolean operators *And*, *Or*, or *Not* to combine searches.

Use *And* if both searching conditions must be met. Click *Perform Search* to carry out search.

You can carry out successive searches by using the pulldown “Search whole library.”



Note:

Unless *Match Words* is checked, EndNote automatically truncates right and left. This means that a search for *word* (with *Match Words* unchecked) would not only find *word*, *words*, and *wording*, but also *sword*. No special character is needed to truncate.

Importing References into EndNote

Importing References from ELIZA, the Wallace Library Catalog

- 1) Perform your search. If you see a list of titles, check the boxes next to the ones you want. When you are done with the page, click on *Save References*. (Your checkmarks will disappear.) If you are in an individual record, simply click *Export*.
- 2) You may save entries from more than one search, as long as you do not a) click *Clear Saved Records* b) close your browser or c) wait too long—there is a timeout after extended inactivity.
- 3) When you are ready to export your references, click *Export Saved List*.
- 4) Select EndNote and the option to save to local disk. Click *Submit*. Save your file as a textfile (.txt) to a convenient, easy to find place, such as your Zip Disk or the computer's desktop. You may want to give the file a distinctive title—the default is export .txt. (If the records display on the screen, simply save the page as a text file from the browser window.)
- 5) Open the library to which you would like to import the references you chose.
 - Go to *File >> Import*.
 - In the *Import* dialog box, click *Choose File* and navigate to your saved text file. Click *OK*.
 - For *Import Option*, choose *EndNote Import*.
 - It is safest to *Import All* duplicates—you can find and eliminate them later.
 - For *Text translation*, the default choice is fine.
 - Click *OK*.
- 6) Your new imported references will display.

Imported ELIZA records are a little messy:

 - You will notice extra punctuation.
 - Author information may need to be moved around.
 - Edited books may be imported simply as books; you will need to change the reference type to *Edited Book* for the citation to display correctly.

Use *Show Citation* feature, personal examination of the item and your style guide in case there is any doubt.
- 7) After doing the necessary clean-up, you may display all the records in the library by *References >> Show All* or *Control + H*.

Importing References from any Ovid Database

[PsycINFO, MLA International Bibliography, Wilson Humanities Abstracts, Wilson Reader's Guide Abstracts, Wilson Social Sciences Abstracts, etc.]

- 1) Perform your search. Save items by checking the boxes next to specific titles.
- 2) When you are ready to export your references, click on *Citation Manager*, or scroll to the bottom of the page.
- 3) Select *Complete Record, Direct Export* and click on *Save*.
- 4) A dialog box may come up asking how to handle the file. If so, choose *Open file* and select EndNote 6.0 program as the handling application. EndNote should launch. Select your library and click *Open*. The new references should appear in the library window.
- 5) Vet the references for accuracy before showing all the references again (*Control + H*).

Creating a Standalone Bibliography For Assignments #1 & #2

- 1) Select the citations you want to use for your standalone document. This can be done by means of a search (see above).

Or, select the ones you want to include in your bibliography by clicking on your choices, keeping the *Control* key pressed down. Go to *References >> Show Selected* to “hide” the other records.

- 2) Sort the citations the way you want them to come out in your bibliography.

For example, click on the grey *Author* heading to sort your citations by author. (If you an Z-A sort order results, your references were already sorted in that order. Simply click *Author* heading once more to get A-Z order.)

- 3) Select the citation style you want. Go to *Edit >> Output Styles* and select your style, or select it from the pulldown menu for favorite styles.

If your style does not appear in the menu, go to the *Style Manager* (under *Edit >> Output Styles*) and click the box next to the style you want to have appear on your menu. Close the dialog box. Now select the style from *Edit >> Output Styles* or the pulldown *Styles* menu.

For Assignment #1: Choose *MLA*

For Assignment #2: Choose *MLA Annotated*

- 4) Choose *Export* from *File* menu. Give the file a name: You will want to use Rich Text Format on the pulldown menu. Make sure the filename ends in **.rtf**
- 5) Open up your bibliography, either by doubleclicking the icon or by opening Microsoft Word and navigating to open the file (make sure “All Files” is selected for the pulldown). Modify it however you like, give it a title, etc. “It’s yours to keep.” You can now save it as a Word Document.

CAUTION: Changes to your library will **not** affect this bibliography.

If it’s important to have the information in your bibliography be consistent with that in the library, make the change in the library **before** exporting.

- 6) Back in the library, *Control + H* to show all the records in the library again.

LET SHANA KNOW IF YOU HAVE ANY QUESTIONS ABOUT ENDNOTE!

- sgass@wheatonma.edu
- x3736
- or drop by Reference Desk

More to come—how to use EndNote to cite when writing your paper...

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