

The
University
Of
Sheffield.

Managing Bibliographies With EndNote X.

CiCS

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AP-ENote5**

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1. Introduction

EndNote is a database that assists you in the management of bibliographical references. The references can be entered manually or imported from other bibliographical databases. EndNote creates database files called 'Reference Libraries' to contain your references and provides a range of tools for searching and managing the references within each library.

You can cite the references located in an EndNote library into a Microsoft Word or other word processor document. Once the document is complete EndNote and Microsoft Word scan the document for citations and automatically compile the bibliography in a style specified by you.

EndNote is available for both the Windows and Macintosh operating systems and is installed on the University's Managed XP Service. EndNote reference library files are compatible with each other and can be moved between the different operating systems.

The screenshots contained in this document are taken from the CiCS Managed XP Service. This service displays windows and dialog boxes in the classic style with grey maximize, minimize and close buttons. If you are using EndNote on a standard PC, the windows and dialog boxes will have blue maximize and minimize buttons, and an orange close button. This difference is superficial; all functionality of EndNote is the same, whichever computer you use.

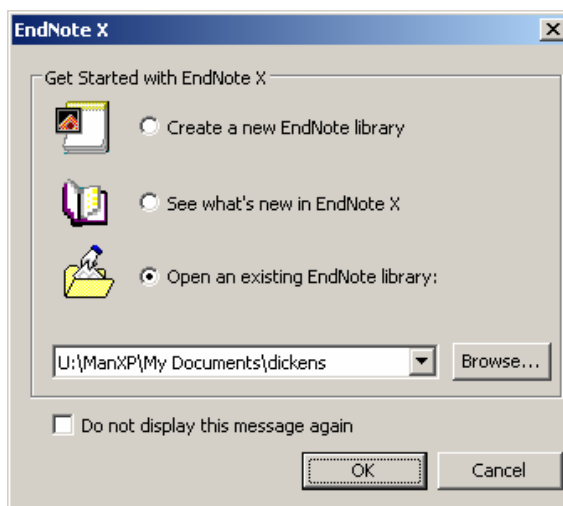
Vista

If you wish to install EndNote onto a computer running Windows Vista, it is quite difficult to configure it to work with Microsoft Word. Call the CiCS Helpdesk on 0114 (22) 21111 or email helpdesk@sheffield.ac.uk and we will be able to help.

2. Getting Started

To start EndNote choose the **Endnote** program from the Endnote folder on the Windows Start menu. On the Managed Desktop Service Endnote can be found in Applications > Academic > Social Sciences menu.

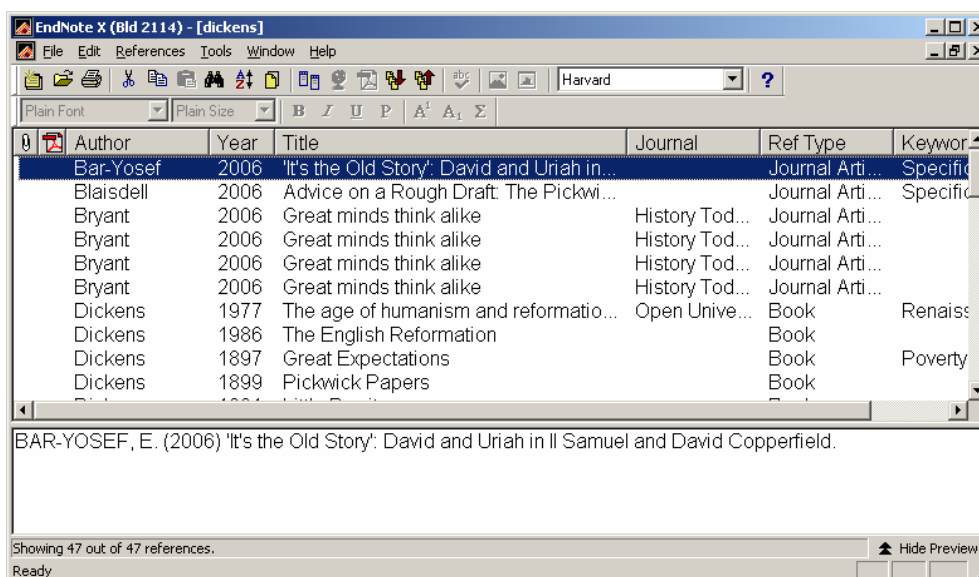
When EndNote starts you will be presented with the following window:



2.1 Opening an existing EndNote Library

To open an existing EndNote library select **Open an existing Endnote Library**. Click the **Browse** button and select the file you want to open.

The Endnote library will now be displayed. The top part of the window shows a list of references while the bottom preview pane displays the reference you have selected, formatted in your current output style, i.e. how it will appear when you site the reference in Word.



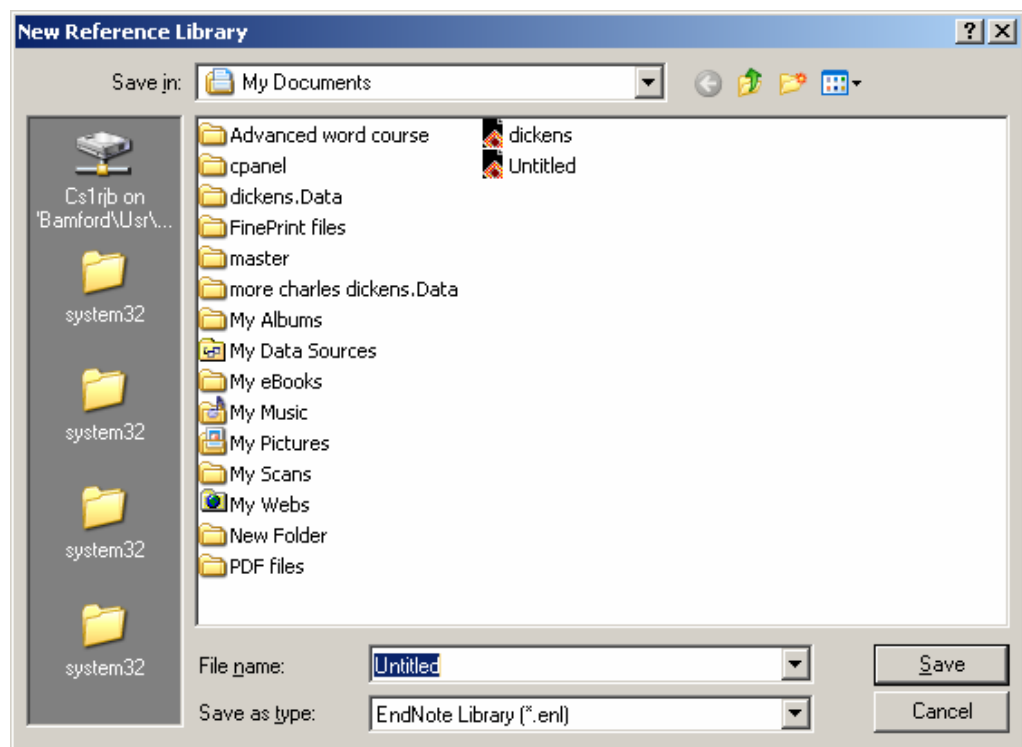
You can use your mouse or cursor arrows or PageUp/PageDown keys to browse the list of references.

You can sort the references by a Author, Year, Title or URL by clicking on the appropriate field name.

You can show or hide the preview of each reference at the bottom of the screen by selecting **Hide Preview** or **Show Preview** at the bottom right of the window.

2.2 Creating a new EndNote Library

- To create a new reference library select **Create a new EndNote Library** and click the **OK** button.



- Select where you want to save your file and give it a filename.
- Click the **Save** button.

While you are using EndNote you can open and close library files, as well as creating new libraries from the **File** menu.

3. Manual Data Entry

There are three methods for imputing data into EndNote:

- Manually entering the data: this section.
- Use EndNote as the interface for on-line bibliographic databases (instead of your web browser) and download references directly into EndNote, see section 5.
- Importing data from on-line or CD-ROM Bibliographic databases, see section 6.

This section will explain how you can manually enter bibliographical references into an EndNote database. In EndNote each different type of source, such as a book or journal article, has a specific reference type, which contains the fields relevant to that media. So the reference type for a journal article contains fields for Author, Year, Title, Journal, Volume, while that for a book contains: Author, Year, Title, Publisher.



To add a new reference to your library, click the New reference button, or click the **Reference** menu, and select **New**. An empty reference window will appear and the empty reference will display the fields for a **Journal Article**.

The screenshot shows a window titled "New Reference" with a "Reference Type" dropdown menu set to "Journal Article". Below the menu are several input fields: "Author", "Year", "Title", "Journal", "Volume", "Issue", and "Pages". The "Author" field is currently selected and is empty.

If the reference you wish to enter is not a Journal Article then you can change the reference type by selecting another reference type from the **Reference Type** drop down menu.

You can now enter information relating to the item you wish to reference. Click the field you wish to enter information into, for example **Author**, and type the relevant information.

The author name can be expressed in two formats: *First name Second name Surname*; or *Surname, First name Second name* e.g. Charles Dickens or Dickens, Charles. For works authored by more than one person each author should be placed on a separate line.

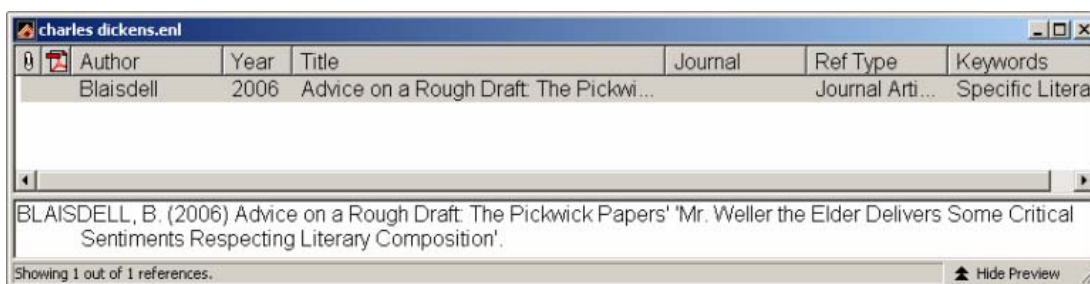
If the author is an organisation, rather than an individual, such as 'Department of the Environment' or 'The University of Sheffield' type the organisation name into the Author field, then add a comma:

Author
The University of Sheffield,

Once you have entered the relevant data into the first field use the **Tab** key to go to the next field and **Shift+Tab** to go back to the previous field. Alternatively use the mouse to click on the desired field.

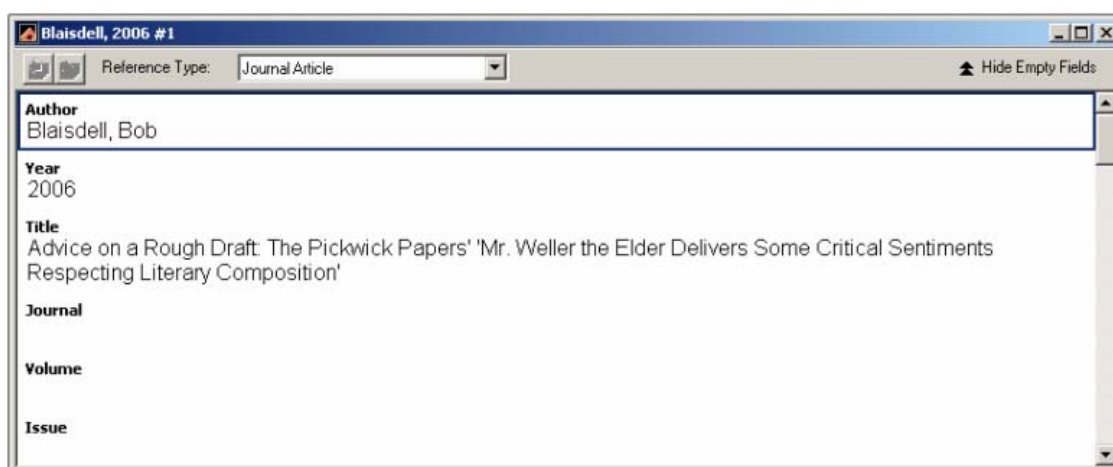
EndNote includes a spell checker which can be run from the **Spell Check** command on the **Tools** menu.

Once all the data has been entered and the reference details are satisfactory, close the Reference Window by clicking the button on the top right of the New Reference dialog box. The information will be automatically saved when the window closes down and the record will appear in the main EndNote Window.



3.1 Editing an Existing Record

You may edit or amend a record at any time. Open the record by double clicking its entry in the reference list.



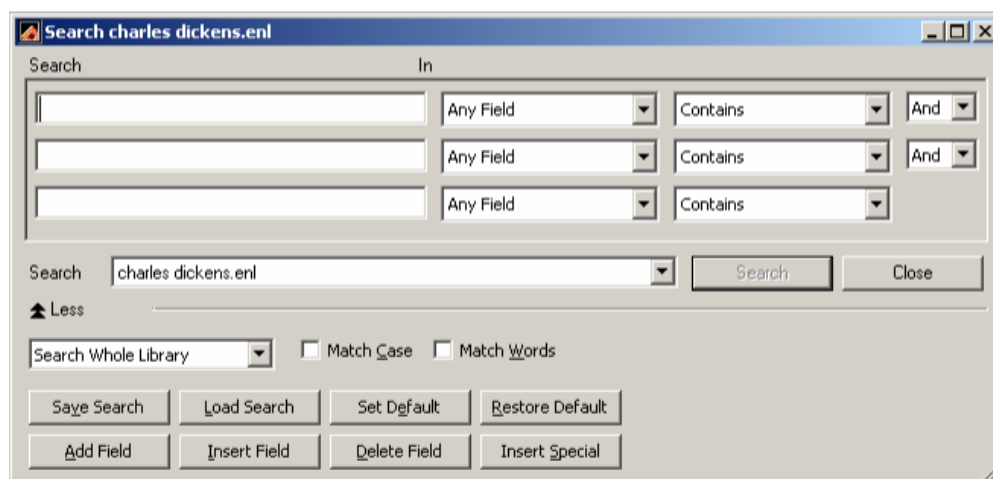
You can now editing the information contained in the record in the same way you would for a new record.

4. Searching and Sorting your References

4.1 Searching an EndNote Reference Library.

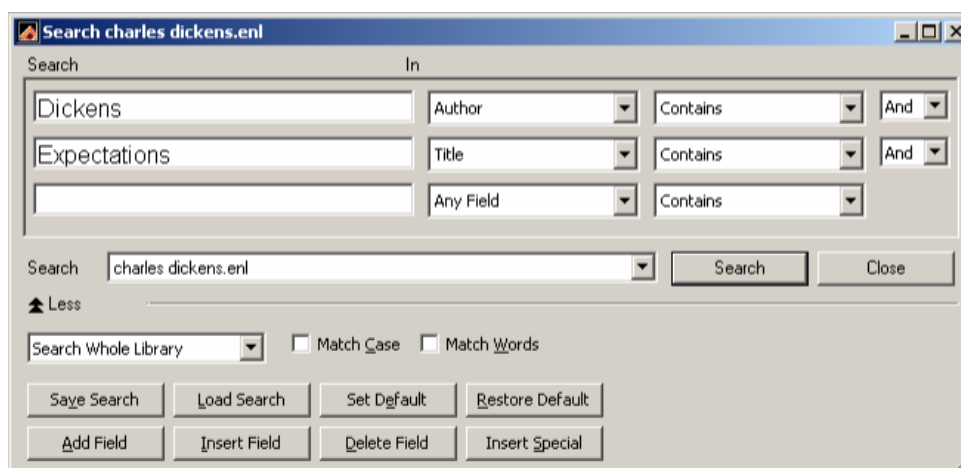
This section will explain how to search your EndNote Library for references that contain a specific word or phrase.

From the **References** menu select the command **Search References**.



Enter a search term into the search box. You can specify which fields to search for each search term by specifying a field in the first menu.

You can also use the **And**, **Or** and **Not** options to refine your fields. So the following Search will display records where the **Author** is *Dickens* and the **Title** contains the word *Expectations*.



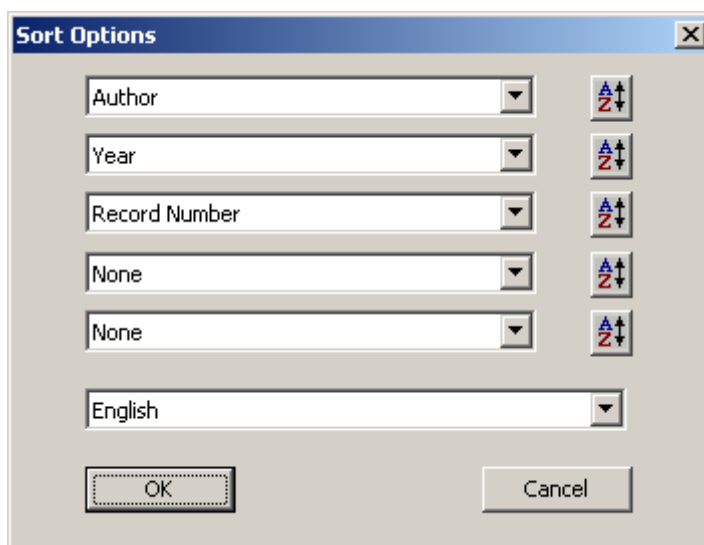
Once you have set the search terms click on the **Search** button, and the results of the search will be displayed in the EndNote Window.

4.2 Displaying all Records

Once you have searched a database you may wish to return to a list of all the records in your EndNote library. Select the **Show All References** command from the **References** menu.

4.3 Sorting References

From the **References** menu choose **Sort References**. The following dialog box will appear



If the field you want to sort by is not displayed click the **downward arrow** to display a list of fields, and select the field you want to sort by using your mouse.

The selected field will appear in the top box, and you can repeat for the next field you want to sort by, if desired.

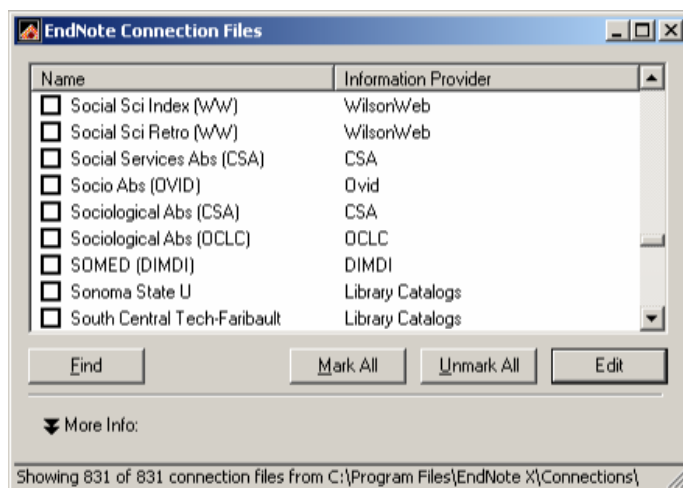
By default sorting will be ascending order. If you want to sort in descending order click the **A-Z** button next to the field name. The button will change and your sort will be in descending order. If you want to change the sort back to ascending order click the button again.

5. Connecting to Online Catalogues and Services.

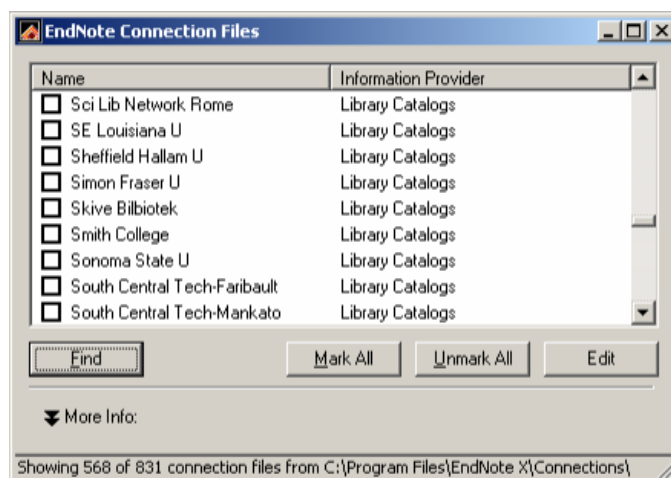
EndNote allows you to connect directly to some on-line bibliographical resources, such as library catalogues, using what is known as a z39.50 protocol. You can then search these catalogues using EndNote's search facilities, and copy references directly into your own reference library. This means you do not have to download and import the data.

5.1 Choose your Connections

First choose the connections that you are most likely to use. From the **Edit** menu select **Connection Files**, then from the sub-menu select **Open Connection Manager**.



Using the **Find** button select the type of Information Provider, then from the filtered list that appears put ticks by the Information Providers that you may wish to use. The selected items will then appear in a menu when you are ready to connect.

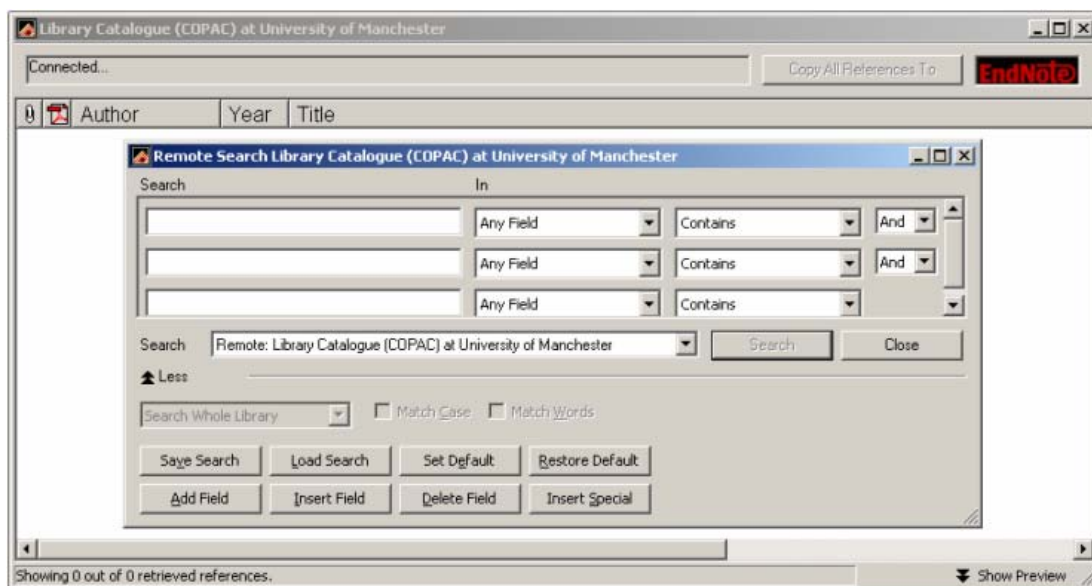


Close the Connection Manager in the usual way.

5.2 Open a Connection

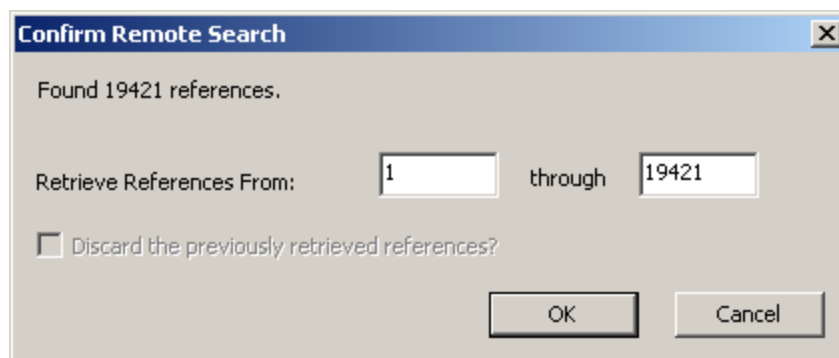
To open a connection chose the **Connect** command from the **Tools** menu. In the sub-menu that appears, your selected Information Providers will be available. Select the one that you wish to connect to. For some on-line services you may be asked for a username and password at this point.

The catalogue and a search screen will be opened, the example below illustrates a search of the University of Manchester.



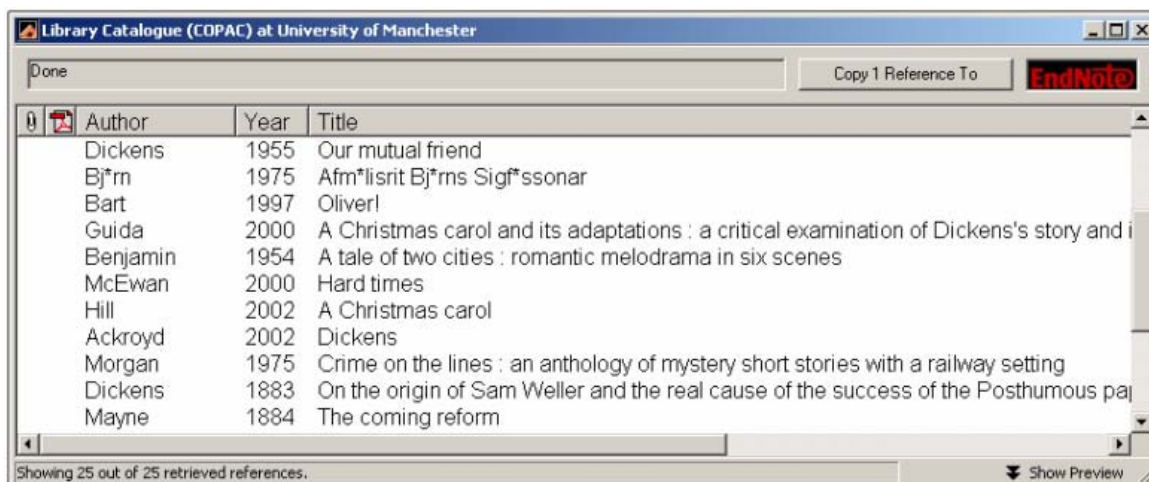
You can now search the catalogue using the searching techniques described in section 4.1.

Once you have entered your search terms and clicked the **Search** button the following dialog will be displayed. This allows you to specify how many of the references, which match your search terms, you want to see.



Specify how many of the references to want to see and click **OK**. The larger the number of references to be downloaded then the slower this process will be.

The selected references will now be displayed.



Select the references you want to import with the mouse, then click the **Copy All References To** button.

A drop down list will be displayed and you can choose which library you wish to copy the references to. There are three options:

- **New Library** option will create a new reference library to store the references.
- **Choose library** option will allow you to choose an existing reference library,
- The final option will be the reference library that is currently open.

Select the appropriate option and your references will be copied into your reference library.

5.3 Closing a Connection

Once you have imported your references from the external source you can close the connection. Close down both the Library window and the search window using the usual close button in the top right corner.

A dialog box will be displayed asking you if you want to discard any of the references you have retrieved but not copied to your own reference library. Click **OK**.

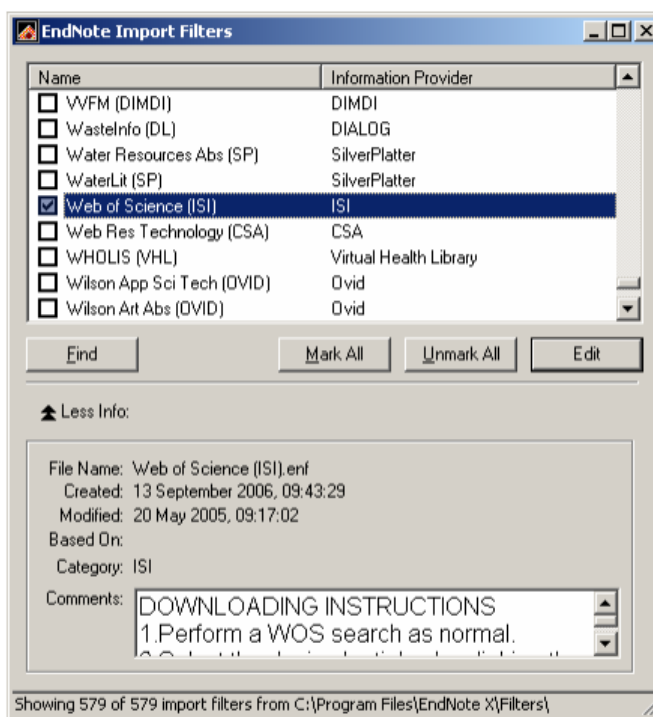
6. Importing Reference Data into EndNote

This section will explain how you can import references from a variety of electronic sources, such as CD-ROM or on-line Bibliographies.

When downloading data from a data source you need to ensure that that you save it in a format that is compatible with EndNote. You will use EndNote filters to import downloaded data files into EndNote. The first step is to identify the correct filter.

6.1 Choose the Correct Filter

From the **Edit** menu in EndNote select **Import Filters**, then from the sub-menu select **Open Filter Manager**



Many databases will be listed. Tick the checkboxes of each database that interests you. You will be able to easily access the selected filters in future sessions.

You can narrow down the list of filters by clicking and holding the **Find** button, then selecting a specific Information Provider.

6.2 Choose the Correct Download Settings

When downloading data you need to ensure that you download the information in a format that is compatible with the EndNote filter. With the Filter Manager still open scroll down the comments box and note the download instructions for the specified database.

In addition the Library have provided information outlining the correct data format for each of the datasets that they provide:

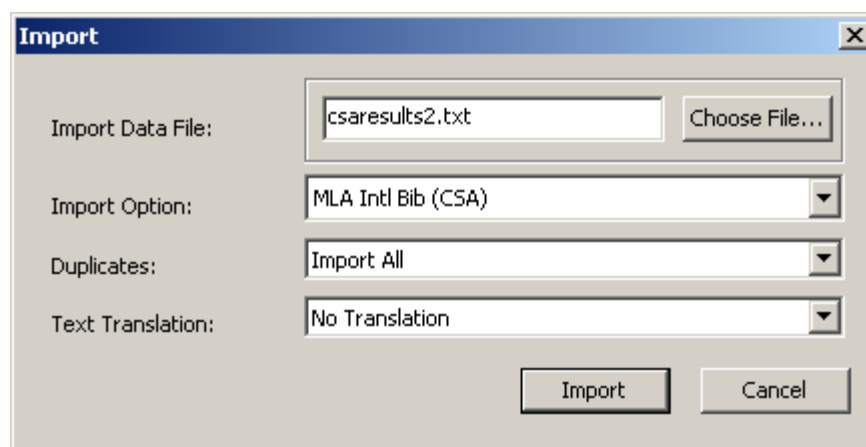
<http://www.shef.ac.uk/library/refmant/databases.html>

6.3 Download the Data

From the CD-ROM or website perform searches to locate references of interest. Select those references that you wish to import into EndNote, then follow the instructions given in the EndNote Filter Manager to save these references in the correct format. This will create a correctly formatted data file on your computer.

6.4 Import the Data File into EndNote

From the EndNote **File** menu select **Import**.



Click the **Choose File** button to select the data file on your computer.

In the **Import Option** menu select the correct Import Filter. Any filters that you placed a tick by in the Filter Manager will appear here.

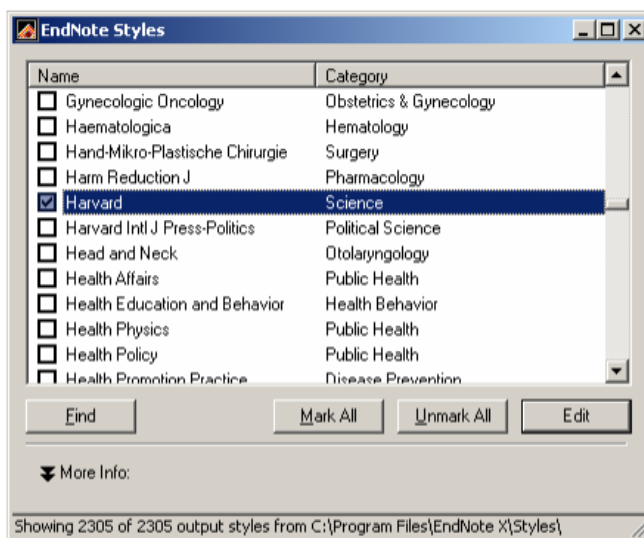
Finally click the **Import** button to load the downloaded references into EndNote.

Once the import is completed only the newly imported references will be displayed in the library window.

7.2 Choosing a Style for References

Different publications specify different styles for references. You should indicate the styles for the journals that you are most likely submit paper to.

From the **Edit** menu select **Output Styles** then from the sub-menu select **Open Style Manager**.



Click and hold the **Find** button, then from the menu, select your academic discipline. The Style Manager will now display a collection of styles applicable to your discipline. Tick the ones that you are likely to use and these will be made available to EndNote and Word. Close the Style Manager in the usual way.

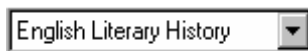
7.3 Inserting a Reference

Start up Microsoft Word, and EndNote, then open your library.

As you write your paper in Word, each time you wish to cite a reference that can be found in your EndNote library, you should position the cursor where you wish the citation to appear and switch to EndNote. The EndNote toolbar has a button for this.



In EndNote, first ensure that the correct style is selected in the Style menu.



Next, locate and select the reference in your library using the usual search techniques if necessary.



Next click the insert citation button (left) on the menu bar or from the **Tools** menu select **Cite While You Write**, then from the sub-menu select **Insert Selected Citation(s)**.

EndNote will usually switch to the Word Document automatically, if it does not return to Word using **Alt** and **Tab** or the Taskbar. A reference will be pasted into your document at the cursor position, and a bibliography entry will appear at the end of your document. Both will appear in the specified style.

To insert additional references, switch to EndNote, select the reference and repeat.

7.4 Changing the Reference Style



If you decide to publish your document in a different publication, you may need to change the style of your references. From the EndNote Toolbar, click the Unformat Citation(s) button. The formatted citations will be replaced by EndNote codes and the bibliography will disappear.

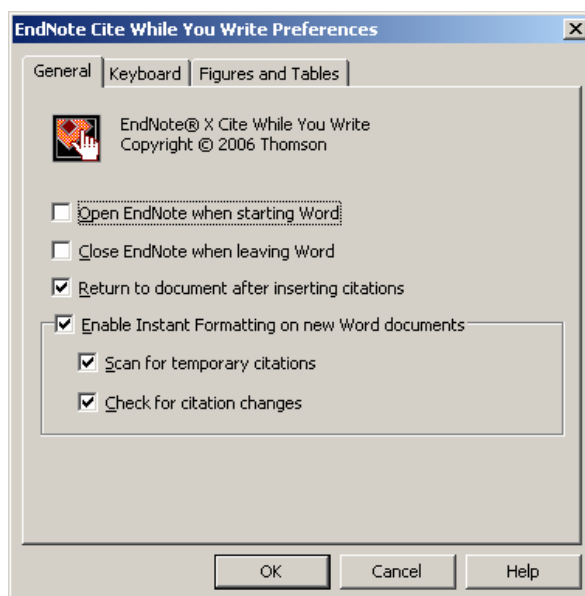


Next click the Format Bibliography button. In the dialog box that appears, select the new output style (which you must have previously selected in the Style Manager) and click **OK**. The citation will then be formatted in the correct style and a new bibliography will appear.

7.5 Changing the Citation Options



If you do not like the instant way that EndNote adds citations you can slow down the process. From the EndNote Toolbar click the Cite While You Write Preferences button.



If you choose to remove the Instant Formatting, all citations will appear as EndNote codes and you can use the Format Bibliography button whenever you wish to format the citation is your preferred style.

8. Reference Styles

As the main purpose of using EndNote is to create papers with appropriate reference styles, it is worth going into more detail. Sections 8.1 and 8.2 describe how to download and edit styles, then section 8.3 covers how to configure EndNote on the Managed XP service so that you can edit and download styles on a Managed XP computer.

8.1 Downloading New Reference Styles

Journals come, go and merge, and over time reference styles change and improve. You can download new output styles onto your own computer from the EndNote website at

<http://www.endnote.com/support/enstyles.asp>

You will see a Style Finder:



The screenshot shows the 'Style Finder' interface with the following elements:

- Style Finder** (tab) and **Sorting Options** (tab)
- Publication Name**: A text input field.
- First 3 Fields (Journal)**: A dropdown menu with 'none' selected.
- Citation Style**: A dropdown menu with 'none' selected.
- Discipline**: A dropdown menu with 'none' selected.
- Bibliography Sort Order**: A dropdown menu with 'none' selected.
- Find Styles**: A green button.

Type the name of any publication into the field and click the Find Styles button to find the output style file for any publication. Click the name of any style in the results list to find out details about that style, then from the details screen click the Download link. You will need to move the downloaded style file to the EndNote styles folder on your hard disk, at:

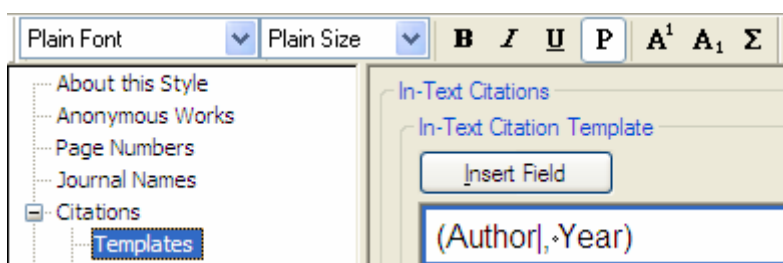
C:\Program Files\EndNote X\Styles

8.2 Editing Reference Styles

It is possible to edit an output style if you need to create your own, individual style. For example the Harvard style describes how a reference should appear in the bibliography, but does not have a specific format for the citation – different University Departments prefer references to be cited in different ways and you may need to change the style on your computer.

To edit a style, open the Style Manager, and select a style that is similar to the one you wish to create, in the example above, Harvard. With the donor style selected, click the **Edit** button.

To change the way a reference is cited in the text, click **Templates**, underneath **Citation** in the left-hand column. On the right hand side you will see the citation style. You can add more fields to the citation, change punctuation characters, and change the formatting of fields.



By exploring the entries in the left-hand column, you can also change other aspects of the citation. For example, you can specify how many authors are listed before 'et al'.

To change how a citation is listed in the bibliography, click **Templates**, underneath **Bibliography** in the left-hand column. On the right hand side you will see the bibliography style. You can add more fields to the citation, change punctuation characters, and change the formatting of fields.

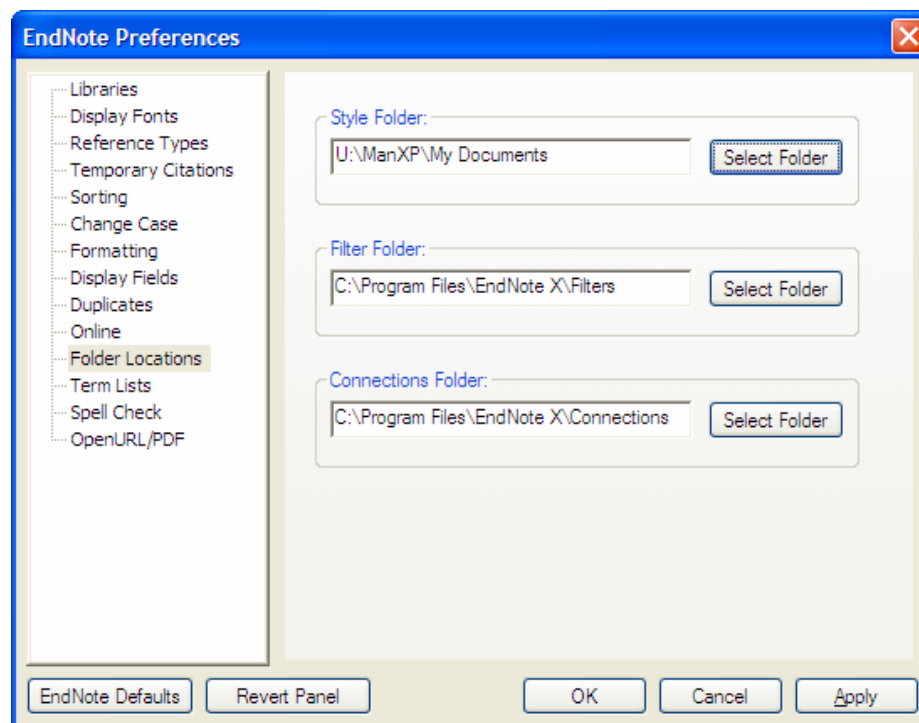
When you have finished your changes, close down the Style Manager. A dialog box will ask whether you wish to save your changes, click the **Yes** button. When you next format a bibliography, the edited style will appear exactly as you have specified.

8.3 Managed XP Service

On the Managed Service, EndNote styles are held on the hard drive, and cannot be edited or downloaded. However, you can configure EndNote to work with styles on your network filestore, drive U, and you can then edit the styles, and download new ones, on there.

To reconfigure EndNote, follow these steps:

1. Open My Computer or Windows Explorer and go to the folder:
C:\Program Files\EndNote X\Styles
2. Select all the output style files that you use, and click the Copy button.
3. Use My Computer or Windows Explorer to go to your U drive, and paste the style files into an appropriate folder.
4. In EndNote, click the **Edit** menu and select **Preferences**
5. In the dialog box, click **Folder Locations** in the left-hand column.
6. In the Style Folder section in the right-hand pane, click the Select Folder button and specify the folder that you have copied the style files into.
7. Click the **OK** button



You will now be able to edit styles as described previously. If you ever need to use a different style just download it into the folder on your U drive.