

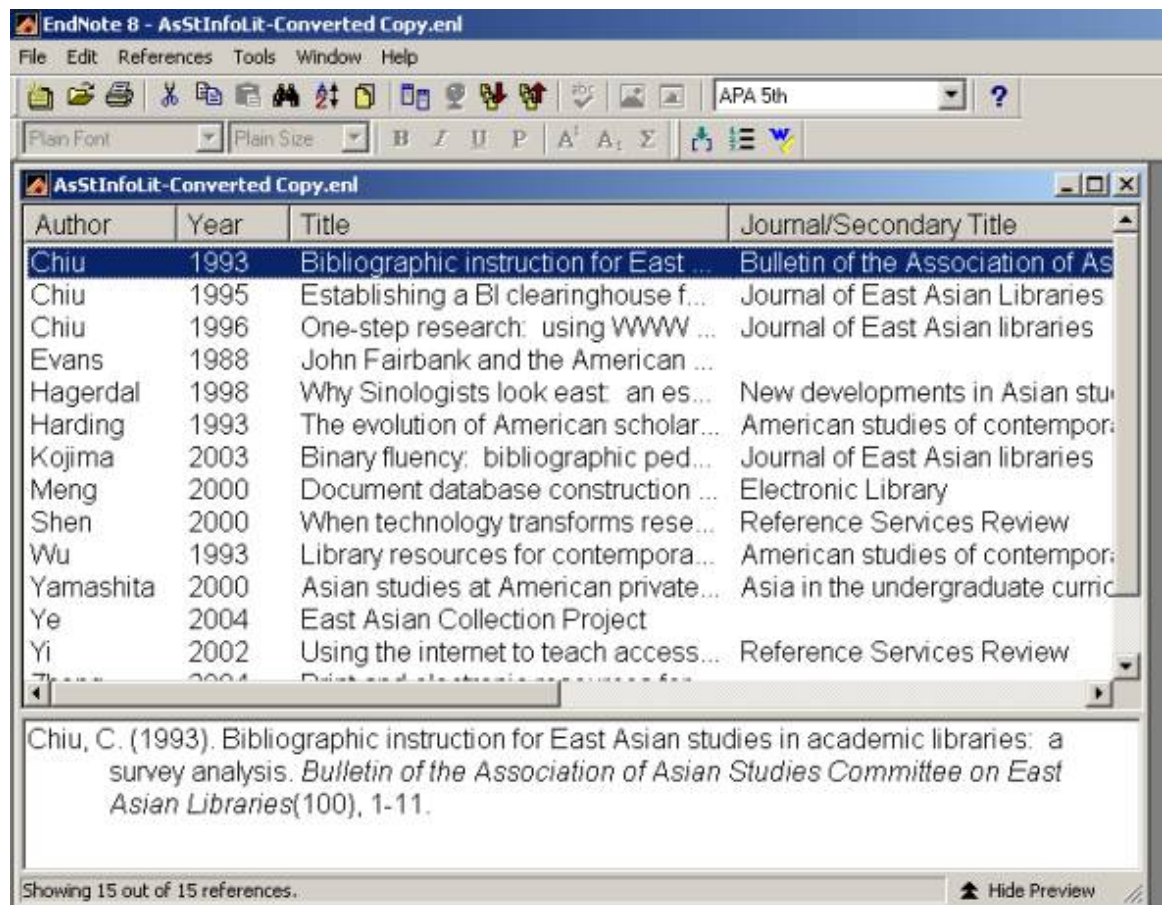
EndNote

A tool for downloading, compiling and using bibliographic records—and for managing PDF files of scanned documents. Fully integrated with Microsoft Word

EndNote Highlights:

1. EndNote is a bibliographic and file management tool, which organizes citations within **LIBRARIES**.

- EndNote **libraries** are organized by author, date, title or any other tag you desire
- Various work forms are provided for different material types and are easily edited
- Libraries are searchable by keyword
- Libraries can hold links to your journal articles saved in PDF format (e.g. JSTOR articles you've saved on your computer)
- Some databases have imbedded software, so that search results can be exported in EndNote-compatible format.



Example of a library

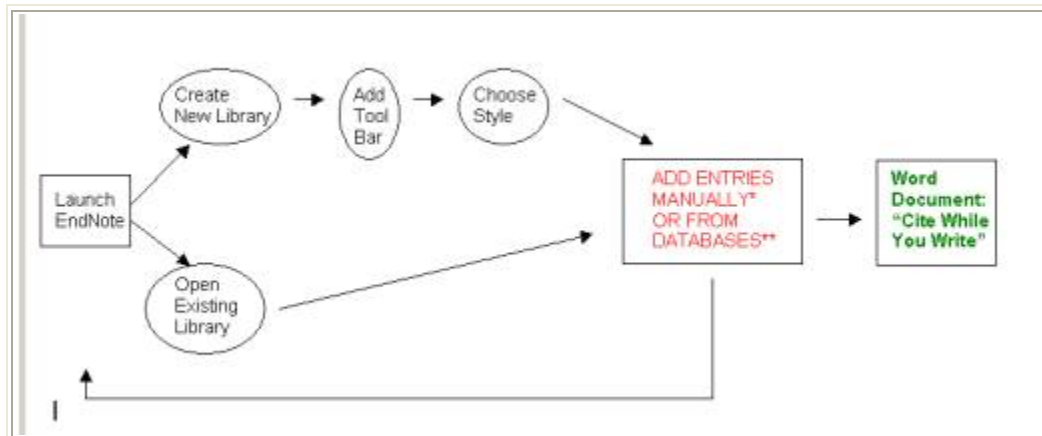
2. EndNote is designed for use with Microsoft Word and Word Perfect

- Applications may be open simultaneously to facilitate in-text citations and compilation of bibliographies for papers—or to compile stand-alone bibliographies.
 - Changing citation formats (e.g. from APA to MLA) is possible with the click of a key.
 - EndNote provides manuscript templates for major journals and style sheets.
 - EndNote works with Word to allow imbedding figures, photos, film clips, etc. along with captions into your text.
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Using EndNote

- A. Set up a Library
- B. Compile a Library of References
 1. Manually
 2. Exporting Saved Searches from OCLC Databases
 3. Downloading from EndNote searching within a Catalog (connect function)
- C. Linking PDF Documents
- D. Compiling Annotated Bibliographies
- E. Writing Papers with MS Word
- F. Saving & Exiting from EndNote

A. Set up an EndNote library on your computer



EndNote is on all computers in Classroom 105.

- Go to Start, then Programs, and choose EndNote.
- Create a new library using the introductory screen or by clicking on File -> New. Name the library and save it to the desktop (& later, to Tigercat)
- Bring the Toolbar into view: Click on Tools -> Show Toolbar -> Main.

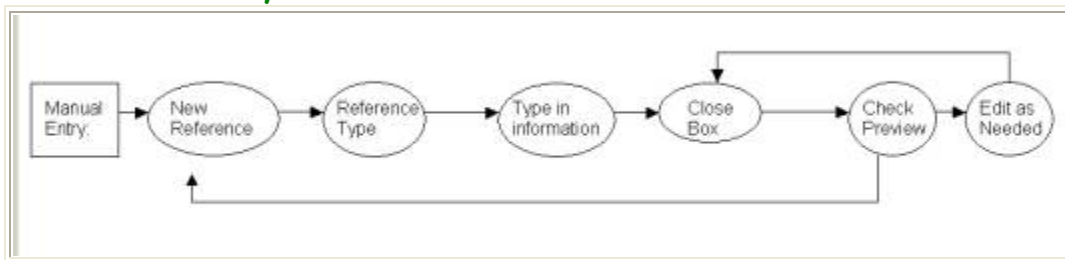
- Choose the style manual or type:
 - Go to the pull down menu on the tool bar and look at the list provided.
 - If the one you want is not listed, highlight "select another style." This might take a minute as it's loading many, many styles.
 - One by one, choose those styles you will most commonly use (probably MLA, APA published, Turabian, & Annotated).
 - Then select a style from these choices in the Current Style box.



B. Compile a Library of References

You may build a library of citations using EndNote in three ways: 1) by entering them **manually**, 2) by **exporting** search results from an OCLC database into an EndNote library, & 3) by using EndNote's searching and downloading capabilities using the **connect** function.

1. Manual Entry



For items you already have in hand, you need to enter the reference yourself. For example, if you found an article in the *Handbook of Sport Psychology* on youth sports:

- Click on the yellow icon about 1/3 of the way in on the toolbar (immediately to the right of the A/Z icon) or use the **references** dropdown and choose **new reference**
- Choose the type of source from the drop-down menu under **reference type**. In this case, the encyclopedia article would be considered a book section



- Fill in the applicable boxes. Boxes can be left blank.

- **For authors**, put in last name first, then a comma, then first name and initial OR first name, middle name or initial and family name. Use the enter key so the names are listed on separate lines. If there is a corporate author (e.g. an organization or government agency) or people end their name with Sr., Jr, etc., end the entry with a comma.
- **For titles of articles in journals or in books**, use upper case initial letters for only the first word of the title (as if you were writing a sentence); EndNote will choose the correct lower and upper case letters depending on your selected style. Likewise, it will decide whether to italicize, use quotation marks or underline titles -- you should just give it the basic words.
- **For titles of books and journals**, it is best to use upper and lower case as the style calls for.
- **Page numbers** can be entered fully (604-635) or in shortened form (604-35; leaving off the second 6) -- EndNote will choose the correct form and adapt your entry. **NOTE: If you have a full-text article from an electronic source** (e.g. Expanded Academic Index or JSTOR) after the page numbers, type the database name and the date accessed. It will then appear in the appropriate place in the citation.
- **Editions** should be listed in numerical format (e.g. 2nd) rather than written out. EndNote will add the word edition as needed.
- If you wish to write an **annotation**, put it in the notes field. At this point, the notes field is only activated in the Annotated style (*i.e.* annotations won't print in Word if you choose another style)
- You may add as much material as you wish (e.g. notes, call numbers, etc.) This will help you as you go back to recheck items as you write. The extra material won't show up in the reference unless the style calls for it.
- When you are finished entering, click the "X" to close the entry box. The author, year and title should show up in the main library box, highlighted, and the reference at the bottom as a "preview." **If the preview is not there, click the preview button on the lower right corner.**
- Completed references can be edited by highlighting the entry and pressing enter, or by double-clicking on the highlighted entry.

2. Exporting OCLC References into EndNote

When you search WorldCat or a FirstSearch database, you can mark the items in your hitlist you'd like to save and then export them to your EndNote Library.

- Search WorldCat or one of the other FirstSearch Indexes
- Mark the records you'd like to export
- Click on the **export** button (near the ILL & print buttons)
- Export marked records from this search
- Export to EndNote
- Export

- Select your library from the drop-down menu
- Choose a filter (try the **find** button, then click on OCLC FirstSearch)
- Choose

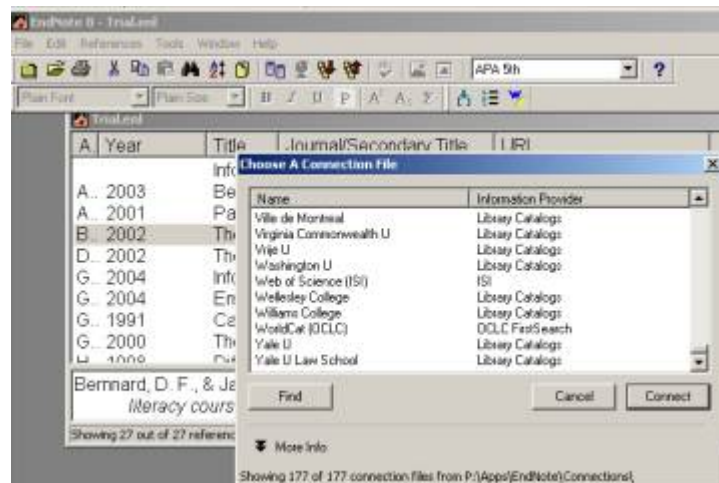
A new page appears with just the newly selected OCLC hits. Edit the list as necessary. When ready, click on the **references** menu, and then **show all references**.

3. Downloading Using the Connect Function: Direct EN Searches in Catalogs

When you search a FirstSearch index or a library catalog using the EndNote **connect** function, you can automatically download the records you choose onto your own computer in an EndNote compatible format without having to save searches or use filters.

Please note that the search engine on WorldCat as accessed through the Middlebury Home Page is much more powerful than the EndNote searching mechanism. It may be preferable to search WorldCat using the system in #2 -- your choice.

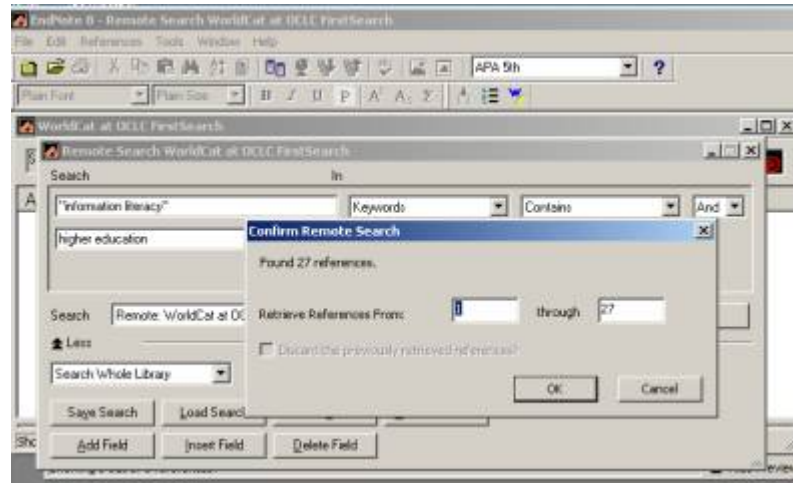
- Click on the **connect** icon (middle of tool bar; up arrow next to yellow icon). Highlight the database you wish to search, and click connect.



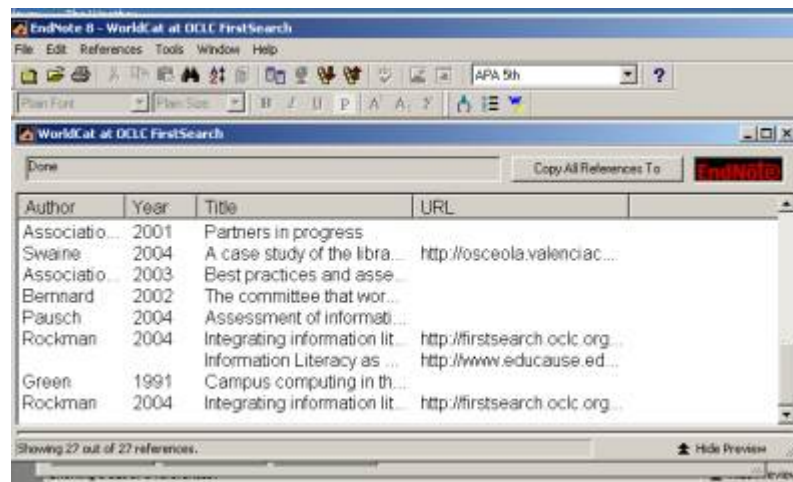
Search using the box provided. Remember, in OCLC databases, the search function is much enhanced by searching OCLC databases themselves.



- Once the search downloads, look at each individual record. Remember, you can double-click on the highlighted reference to call up the work form with all the data. Edit the form if you want to change or delete material. Delete the whole reference by going to references -> delete.



When your references are as you want them, highlight the ones you wish to move to your main library or Click on "Copy all References to" box and choose the library you wish. They will be moved for you. Note: if you click control A (on a PC) to highlight all the references, it may not "unhighlight" by clicking elsewhere. You need to use shift/click to unhighlight one or two. Then, if you click on the unhighlighted to highlight, the rest of them will no longer be highlighted.



C. Linking EndNote Library Entries to Scanned Items in PDF Files:

If you have collections of journal articles or other scanned materials stored on your computer, you can link these to listings in your EndNote library for easy cataloging and access. Note: make sure you have the scanned items stored in the most logical manner before you make the links. If you move them later the links will need to be redone.

- When you name your documents, we suggest you use the author's name and a pdf extension (e.g. Jones.pdf). Label the second article by Jones "Jones2.pdf" or "Jones2004b.pdf."
- In the worksheet for that article, move down to the "URL" field and place your cursor there.
- In the toolbar, click on References -> Link to and select file as usual.
- To open the document, put cursor on the url. Go to References -> Open link
- Some users with very large libraries copy their pdf files to CDs and just note the CD number and file name in one of the worksheet fields

D. Compiling Annotated Bibliographies with EndNote

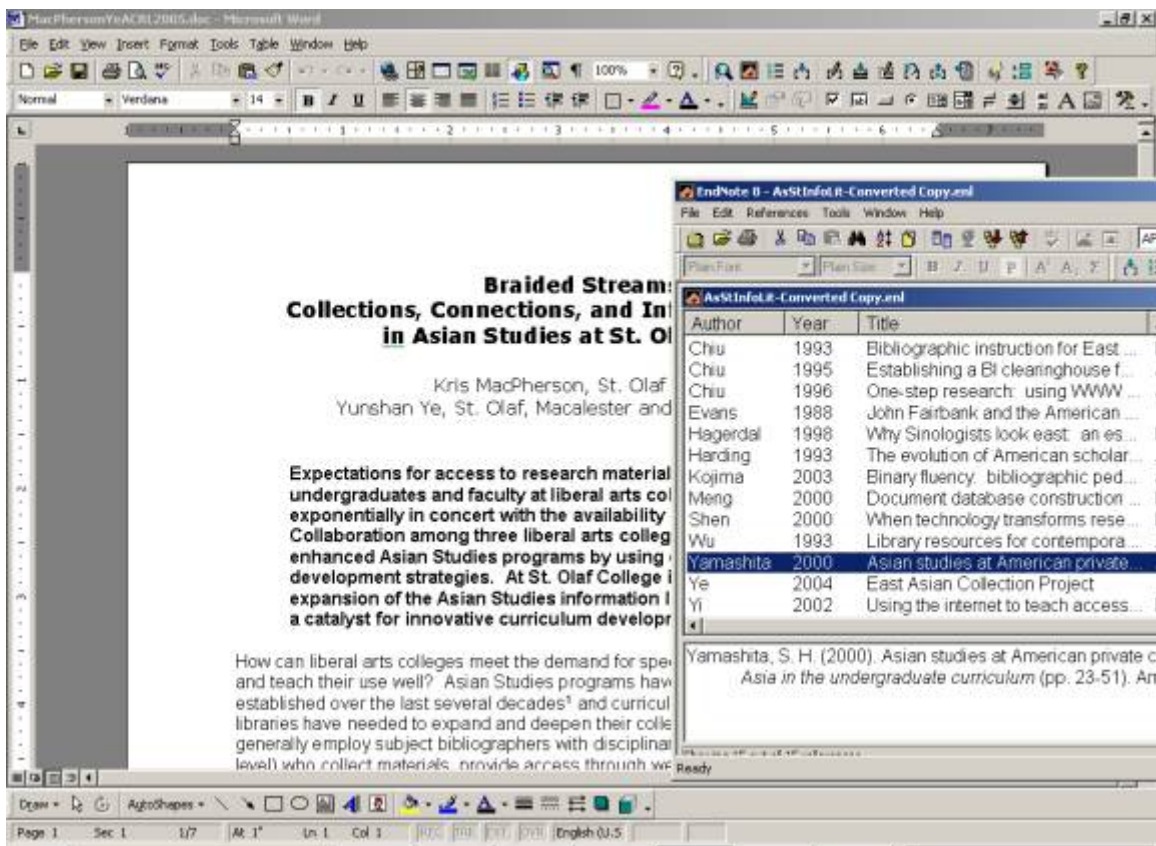
- Enter the reference to your article or book into your EndNote Library as described above (either manually or by downloading from a database).
- In the notes field, write the annotation. (If there are other items in the notes field, move them to a different field or erase them.)
- Create the annotated bibliography as a Word document:
 - In EndNote, make sure you have selected the annotated style (see A above).
 - Open a new Word document and choose the appropriate settings for font and size.
 - In EndNote, select the references you want for your annotated bibliography by clicking on the first reference, then holding down the control key and clicking on the others you want. It is best to take all the references you need at once -- otherwise you will have to manually alphabetize your bibliography later.
 - Reduce the size of the EndNote screen so that you can see both Word and EndNote.
 - Holding down the CONTROL key, drag and drop the highlighted references to the Word document. **Don't forget the control key!!!**
 - To put the bibliography in "hanging indent" format or to make any other changes to the format, go to the EN toolbar (in Word) and click on the 1. 2. 3. icon just to the right of the EN icon.



- Save your Word file.

E. Writing papers with Word and EndNote

- Open Word on your machine in normal view. Open your EndNote library, keeping it in the smaller view. Make sure the correct citation style is chosen in EndNote.



- Type your text as you would normally. However, when you are ready to cite someone, point your cursor to the place you want your first citation to appear. You can do this in several ways.
 - **In EndNote**, highlight the reference you wish to cite. **In Word**, go to the EndNote toolbar, click on Insert Selected Citation(s) button or use the drop-down Tools menu.



Note that first a numbered reference will appear -- not in proper format. The software will crank away for a bit the first time you insert a citation. Then suddenly, the in-text reference will be correct and the bibliography reference will appear at the end of the paper. Save your Word file and continue. OR

- In EndNote, highlight the reference you wish to cite. Drag the selected reference from EndNote to Word. Save your Word file and continue. OR
- Go to the EndNote toolbar and click on Find Citation(s). In the "Search for" box, type in keywords (e.g. author, significant title word) to identify the source you wish to cite and click Search. EndNote will list the matching references. Highlight the correct reference

and click insert. OR

- To insert several references together, hold the Control key down while highlighting all the references you wish to place together. EndNote will insert them as one multiple citation and sort them according to the rules of your chosen Style.
- Sometimes you need to add the page number in the citation, or you don't need the full data. To modify individual citations within Word, highlight the one you wish to edit. On the EndNote toolbar, click the "Edit citation" button to open the Edit box.
 - Excluding the author's name: If the author and reference already are fully identified in the context of the sentence and page numbers are not needed, no additional in-text citation is necessary (MLA 5.4.1). Check the "Exclude Author" box. In this way, the reference will not appear as an in-text citation, but will be included in the full works-cited list.
 - Excluding the year of publication: If you have chosen a style other than MLA, the year may be included in the in-text citation. If you have referred to the year in the text, you may not need it in the citation.
 - Adding prefixes and suffixes: In some cases, it is appropriate to add words such as "qtd. in" or "for example" or "see" before the author's name within the citation. Use the Prefix box to include these words using your citation style for capitalization and punctuation (MLA 5.4.7). Suffixes are less commonly used.
 - Adding page numbers: When you are citing a specific page or section in your source, include the appropriate page numbers in the Page box (MLA 5.4.2).

If you need to change the format once you have already entered references or need to change the title of the bibliography, etc., go to the EndNote toolbar in your word document. The **numbered list** is the **format bibliography** icon. On the first screen you may switch styles; under **layout** you may **retitle** your bibliography.

F. Saving and Exiting from EndNote

When you close your EndNote library, it is saved automatically. The good news is you don't have to worry about forgetting. The bad news is, if you really mess things up, you can't close without saving changes. If you're going to experiment in a big way, it's best to copy the original library, retitle the copy and test the new techniques there.