

EndNote Class Outline

Building Your EndNote Library

1 Introductions and Overview

1.1 Introductions

1.2 Functions of EndNote

1.2.1 *Bibliography Creation*

EndNote works with your word processor to create formatted bibliographies.

1.2.2 *Reference Organization*

EndNote is a database program to track your references.

1.2.3 *Connectivity with the Online World*

Internet Search allows you to search online databases from within EndNote.

Direct Export downloads references directly from online databases into EndNote.

Importing Text Files allows importing of text files saved from online database searches.

1.3 EndNote Requirements

1.3.1 *Windows*

- Windows XP SP2 or Vista
- 450 MHz or higher Pentium-class CPU
- 256 MB of available RAM
- 180 MB of free disk space

1.3.2 *Macintosh (EndNote X1)*

- OS 10.3.9 – 10.5.x
- PowerPC G4 / Intel Mac, 450 MHz or higher (Universal application)
- 256 MB of available RAM
- 180 MB of free disk space

1.4 Word Processor Compatibility

1.4.1 *Windows*

- Cite While You Write - Microsoft Word 2003 and 2007
- Format Paper feature works with any word processor capable of producing rich text format (RTF) documents, and Open Office files saved in the Open Document Type (ODT)

1.4.2 *Macintosh (EndNote X1)*

- Cite While You Write - Microsoft Word X, 2004, 2008
- Format Paper feature works with rich text format (.RTF) documents produced by any word processor

1.5 General “Statistics”

- Allows creation of an unlimited number of personal databases (generally called “libraries” in EndNote)
- Windows and Macintosh libraries are compatible
- Allows an unlimited number of libraries to be open at one time
- Each library can contain an unlimited number of references
- Each record can contain up to 52 fields (e.g., Author, Title, etc.)
- Ships with 45 predefined reference types and 3 unused references types that can be customized to meet your needs

1.6 After the Class

1.6.1 The EndNote Getting Started Guide

You can use the EndNote Getting Started Guide to practice what you have learned. The Getting Started Guide can be found in Chapter 3 of your EndNote manual and is also available in a PDF file that is included with the trial version of EndNote.

1.6.2 Technical Support

Technical Support is free and is available Monday–Friday, 6 a.m. to 5 p.m., Pacific time. You can reach technical support using the *Contact Us* area of our web site or by calling 1-800-336-4474, pressing 4 at the prompt, then selecting the *Research Software* option.

2 Creating and Adding Records to an EndNote Library

2.1 The Sample Library

The Sample library is placed in the EndNote Examples folder during installation and is used in the exercises in the EndNote Getting Started Guide.

2.2 Customizing the EndNote Preferences

To edit the preferences, on Windows select **Preferences** from the **Edit** menu, on Macintosh select **Preferences** from the **EndNote** menu to the left of the File menu. _____

2.3 Manually Entering References

Select **New Reference** from the **References** menu to create a new record. _____

2.3.1 *Selecting the Reference Type*

Select the reference type from the pull-down **Reference Type** list at the top of the empty record.

2.3.2 *Entering Data*

Do not format the data as you enter it if the formatting would apply to the entire field. For example, do not italicize or bold author names or journal names. If formatting applies to only some words or characters in a field, then you can apply that special formatting using the formatting toolbar.

You do not need to enter data in every field. Enter the data that you require for your bibliography or that you wish to track.

2.3.3 *Special Fields*

Authors: Author names can be entered either given name and then last name (e.g., John Robert Smith) or last name, then a comma, then the given name (e.g., Smith, John Robert). Each author must be on a separate line. Add corporate authors with a comma at the end of their name (e.g., University of California,). If you use a name that has been used before in the library, EndNote will automatically enter it for you.

Year: This is not a true date field. It is an alphanumeric sorting field. Enter four-digit years. You can also enter text such as “unpublished” or “in press.”

Journal: EndNote will automatically enter a journal name that matches your typing. When what you are typing no longer matches any journal previously used in the library, the name will turn red. _____

Pages: Pages can be entered as a full range of pages (e.g., 125-128) or as a truncated range (e.g., 125-8). EndNote is able to convert the format entered to the format required in the style. _____

Date: This is not a true date field. It is a text field and will be shown in your bibliography exactly as entered. Do not include the year here because if your style calls for date information, the year will be pulled from the year field.

Short Title: If a full-reference footnote style calls for a shortened version of the title in repeated citations, that information will be pulled from the short title field. This field is generally used only in the humanities. _____

Alternate Journal: This field is used for the abbreviation of the journal name. _____

Keywords: Enter keywords with a semicolon(;), a line break, or a backslash (\) between each keyword. _____

URL: You can copy and paste a URL into this field or type it in manually. _____

File Attachments: You can attach files or insert links to files on your network or hard drive by selecting **File Attachments**, then **Attach File**, from the **References** menu. The default in EndNote X1 is to attach the file to the record so that it travels with your library. You can change this default on a case-by-case basis during file selection by unchecking the option at the bottom left of the file selection window called *Copy this file to the default file attachment folder and create a relative link*. You can also change the default option in the preferences. _____

Figure: This is another way of attaching a file. To insert a picture file (a .bmp, .gif, or .jpg file), select **Figure**, then **Attach Figure** from the **References** menu. If the file inserted is a picture you will see a thumbnail image of the picture; if it is an object you will see an icon for the object's file type. There can be only one file linked to the image field per record. _____

Caption: This field is tied to the Figure field. When the image is inserted into a Word document, the contents of the caption field will be used as the caption for the image in Word. _____

2.4 Creating a Library

Select **New** from the **File** menu. You can place your EndNote libraries anywhere you choose on your hard drive or network. _____

2.5 Online Connectivity—Importing References from Online Databases

2.5.1 Online Search—Searching an Online Database from within EndNote

In the Groups pane on the left, select the connection file you want to use from the favorites list or click on “more...,” which will bring up a list of all available connection files. Select the database you want to search from the list. Another option is to go to **Online Search** from the **Tools** menu in EndNote.

Either method will activate the Search tab on the Tab Pane. _____

References from an online search are automatically brought into your EndNote library. There will be a future patch that will give you the option of showing your online search results in a separate, temporary library window.

2.5.2 Direct Export

The exact method for using direct export will vary with the data provider you are using. A sample of the data providers that support direct export for at least some of their databases includes: Thomson Scientific (ISI), Oxford Press Journals, American Psychological Association, BioMedCentral, BMJ, Buffalo University, EBSCO, EI Engineering Village, EMBASE, Los Alamos National Laboratory, Stanford University’s Highwire Press, IEEE, JAMA, Karger Publishing, JSTOR, MicroPatent, NERAC, NISC, OCLC, OVID, PROQUEST, Elsevier, Science Magazine, and TIE.

This link provides Direct Export instructions for common data providers:

http://endnote.com/endnote_export.asp

2.5.3 Importing a Text File Saved from an Online Database

All importing uses a pattern matching process where the pattern of the tags in the data is matched against the pattern of the tags in the import filter (the filter is also known as a “capture file”). It is very important that data be saved in the tagged format that matches the filter that will be used to import it. Below is an example of tagged text. The tags are on the left and the data follows them.

```
TI - The Scale and the Feather: A Suggested Evolution
AU - Rex, Tiberius
```

For specific information on how to save data for the database you are using consult the table titled *Output Formats and Corresponding Import Options*. This table is available in the EndNote Getting Started Guide and in Appendix D of the manual.

2.6 Groups

- You can create a maximum of 500 Custom Groups and Smart Groups (combined) in a single library.
- You can add a reference to a particular group only once (based on the unique record number). However, you can add that reference to any number of groups.
- You can drag references from one library directly into a group in another open library. The references are copied to the second library and into the target group.
- Deleting a reference from a *library* also deletes it from all *groups* in that library. The reference no longer exists.
- Deleting a reference from a *group* deletes it only from the group, it does not delete it from the library.
- Once you move a reference to the Trash group, it is no longer officially in your library (it will not appear in any other group or reference list, it is not included in your reference count, and it cannot be searched or cited). However, until you choose *Empty Trash*, you can still drag the reference from the Trash group back to your active library.