

Bibliographic Management Software: An Introduction to EndNote X2 Randall Library Workshop

FREE 30-Day Trial: <http://www.EndNote.com/endemo.asp>

✿ What is EndNote?

EndNote is one of several software programs called "Bibliographic Management Software." EndNote will store, organize and format lists of references/citations. Users create "libraries" of citations that can include references to books, journal articles, images, webpages, etc. Users can search through these libraries, insert citations into papers, and instantly create bibliographies in any style format.

✿ How will EndNote help me?

EndNote allows you to organize references in a searchable database and format your bibliography instantly as you write your paper/manuscript.

If you have difficulty organizing your citations or finding them when it comes time to write your paper/manuscript or if you have trouble formatting a bibliography, then EndNote (or another Bibliographic Management Software product) will help you.

✿ Where can I use EndNote?

Unfortunately, EndNote is not currently available in any lab on campus. We hope to eventually have campus access through ITSD or the library. You may wish to contact your department to purchase a copy or purchase a copy as an individual. If you want to purchase EndNote for your personal use, students can purchase a copy here: <http://www.journeyed.com/> (\$114.98) or for faculty/staff: <http://www.EndNote.com/enorder.asp> (\$249.95).

✿ Where do I go if I need help?

EndNote provides FREE guides and tutorials: <http://www.EndNote.com/training/>
EndNote provides technical support via e-mail or telephone:
<http://www.EndNote.com/encontact.asp>

✿ What are some of the other Bibliographic Management Software products?

Biblioscape (<http://www.biblioscape.com/biblioscape.htm>)

Trial: <http://www.biblioscape.com/downloadreq.htm>

Papyrus (<http://www.researchsoftwaredesign.com/>)

FREE: <http://www.researchsoftwaredesign.com/Download7.html>

ProCite (<http://www.procite.com/>) | Trial: <http://www.procite.com/pcdemo.asp>

Reference Manager (<http://www.risinc.com/>) | Trial: <http://www.refman.com/rmdemo.asp>

RefWorks (<http://www.refworks.com/>) | Trial: <http://www.refworks.com/> - click on "Trial Request"

Getting Started: The Basics of Using EndNote (for version X2)

Step 1: Create an EndNote Library

- Open EndNote **Start – All Programs – EndNote - EndNote Program**
- File – (Select location to save library)
- Name your library (i.e. "my research topic.enl") and save it

Step 2: Running and saving a search

- For this workshop we are going to use **Academic Search Premiere** (an EBSCOhost database)
 - Go to the library's homepage (<http://library.uncw.edu>)
 - Click on "Articles & eResources"
 - In the middle of the page, click on "EBSCOhost"
 - Click on "Academic Search Premiere" (first database in list)
- Run a search in the database on any topic of interest to you
- Click "Add to folder" below each relevant citation to save citations
- Click on "Folder" (top of screen) or "Folder view" (right pane)
- Once you are in Folder view, put a check mark in the box to the left of each citation you wish to save and click on the "Export" icon above citation list
- Select "Direct Export to EndNote, ProCite, or Reference Manager" and click on the "Save" button. You may wish to uncheck "Remove these items from folder after saving"
- EndNote will open
- Your citations will automatically be imported into EndNote into the library you created
- Examine citations for correct formatting and make corrections as needed



Step 3: Add to your EndNote Library by importing citations when "Direct Export" is not an option

- Within database, save citations as a text file (.txt)
- Import into EndNote **File – Import - Choose File - select file and open**
- Select an import option **Import Option: - Other filters ... - Select filter - (e.g. Sociological Abs - CSA) - Choose**
- Click "Import"
- **References – Show All References**
- Examine citations for correct formatting and make corrections as needed

Step 4: Add to your EndNote Library

- Go to **References – New - choose Reference Type from drop down menu**
- You can also copy and paste from a Word or text file

Step 5: Manage your references in your EndNote Library

- **Sort** Library by clicking on columns or go to **Reference - Sort**
- **Search** for a subset: **Tools – Search Library – any key word you're looking for**
- **References - Find Duplicates**

Step 6: Use "cite while you write" feature with **Word 2007**

- Choose a format for your bibliography (e.g. APA, MLA): **Edit - Output Styles - Open Style Manager - Choose Style (check one or more) – Close Window**
- Open Word and open a blank or existing document
- Type text and insert citations while typing [requires copying .wll or .dll files from EndNote into Word Startup folder]. In Word go to the **EndNote X2 tab - Go to EndNote - select citations** then go back to Word and go to the **EndNote X2 tab - Insert Citation – Insert Selected Citation(s)**
- To change format of bibliography, select **format** from drop down list next to **“Style”** in the **EndNote X2 tab**

Attach a .pdf file to an EndNote Library record

- Open article (.pdf) within subscription database (e.g. *Academic Search Premiere*)
- Save .pdf to computer location of your choice (e.g. Desktop) (this can be deleted later)
- Go to appropriate EndNote Library and double click on relevant citation (the citation for which you have the .pdf file)
- Select **References – File Attachments – Attach File**
- Locate .pdf, select the .pdf to insert and then **Open**
- The .pdf is now saved in that EndNote Library and you may remove it from your computer (i.e. the location you originally saved it to such as the Desktop)
- Scroll down in EndNote record and click on .pdf icon to view .pdf

EndNote Terminology

Bibliographic databases: These are the databases you can search to find citations of articles, books, etc. Examples include *Biological Abstracts*, *InfoTrac*, *ERIC*, *PubMed* and other databases provided by Randall Library. These are also referred to as “subscription databases.” It is important that you save your search results in the format specified (typically as a .txt file).

Record (Bibliographic record): A collection of information that describes a work (a book, journal article, music score, etc.). This information usually includes title, author, source, publication date, place of publication, etc. It may also contain an abstract of the work, keywords, and other useful information.

Vendor: Bibliographic databases are produced by one company and often packaged and sold by many different companies called “vendors.” It is important for EndNote users to know which vendor supplies the bibliographic database they use to search for citations in order to choose the correct filter to import records into EndNote. For example, Randall Library’s version of the *PsycINFO* database is supplied by the vendor *EBSCO*.

EndNote Library: The database of references you create in EndNote is called an EndNote Library. It is possible to create multiple EndNote Libraries within EndNote. When you save an EndNote Library, the file extension is ****.enl*. You can add references to your EndNote Library by importing them from bibliographic databases or by typing them in yourself.

Import: The action needed to bring citations found in database searches into an EndNote Library.

Import filter (EndNote filter): Filters are needed for the EndNote software to correctly read the formatting of citations imported into EndNote from bibliographic databases. There are many choices of filters in EndNote. You must choose the correct filter for each database that you search by matching the filter to the title and vendor of the database.

Output Style: EndNote allows you to create bibliographies from your EndNote Libraries by choosing the output style that you need to use. Examples include APA 5th ed., Chicago, and MLA.

Add-ins: These are small programs provided by EndNote that allow it to work in conjunction with Word or WordPerfect. It integrates EndNote commands into the *Tools* menu of your word processing software.

Templates: These provide EndNote with the format for import filters and for output styles. Each filter and each style has a unique template. Existing templates can be edited and new templates created to suit your particular need.

Connection files: At the present time, Randall Library does not support connection files to connect directly to bibliographic databases for creating EndNote Libraries.