

A How-To for EndNote

[If you do not yet have the latest version of EndNote (ie in December 2009 it was X3), I strongly suggest you download it – see the PDF *Downloading EndNote from NCKU server*. Versions older than EndNote X1 often create problems for students.]

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1 INTRODUCTION

EndNote can be more than just a smart and easy way to deal with citations and references in a document – it can also be used as an organization tool for research and report writing. There will be a bit more work up front, but once you are writing your report, it should be a big help.

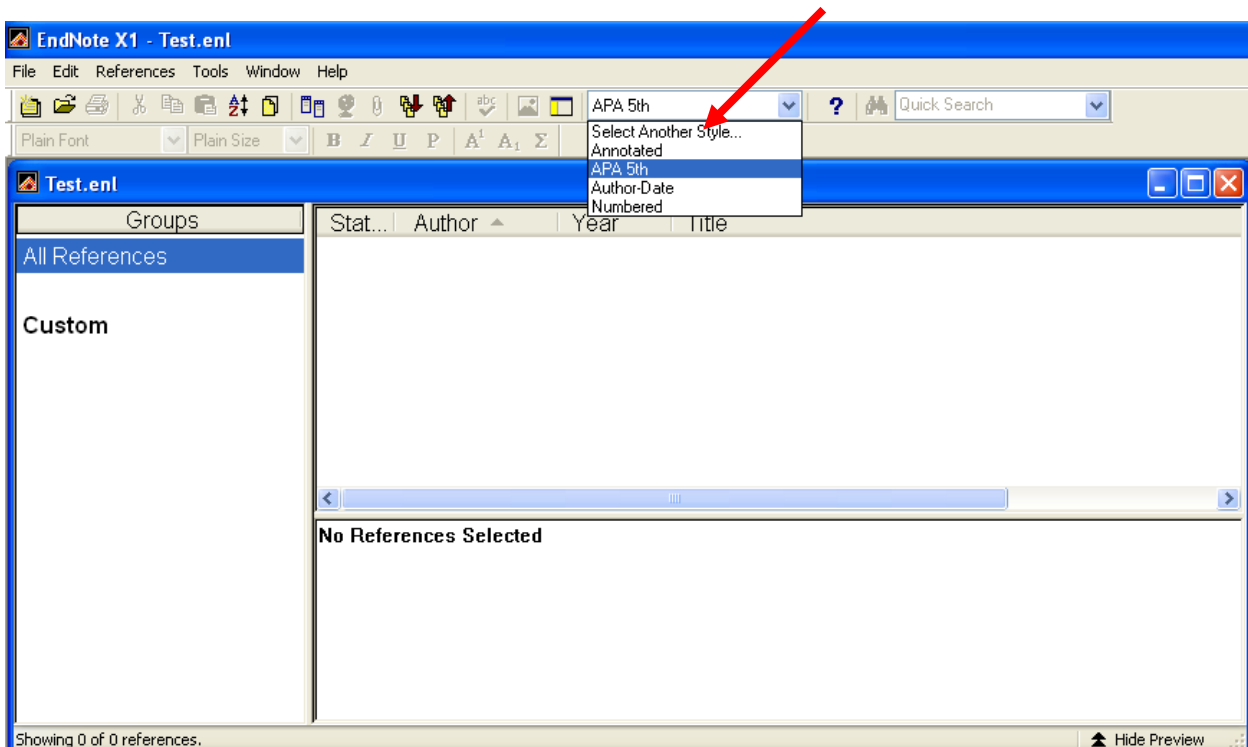
2 CREATING A NEW LIBRARY

Step 1: Create a new library in EndNote

- When you start/open EndNote, or
- From File → New (when EndNote is already open)

Step 2: Set your library style (this will be effective for all your libraries) to **APA 5th IIMBA**.

- You must first save the style into your C:/Program Files/EndNote/Styles folder
 - Style is available:
 - In the zip folder provided you, or
 - From brilliantcheckers@gmail.com



3 ADDING REFERENCES TO YOUR LIBRARY

3.1 Downloading and Importing from Online Databases or Journals

3.1.1 Searching for articles

If you are searching NCKU library's E-Resources from an off-campus location, you will have to change your LAN settings:

Go: Tools --> Internet Options --> Connections --> LAN Settings --> (tick "proxy server") --> Address: rpa.lib.ncku.edu.tw --> Port: 3128

Go to the Library's website: <http://www.lib.ncku.edu.tw/english/index.htm>, and click on *E-Resources*.

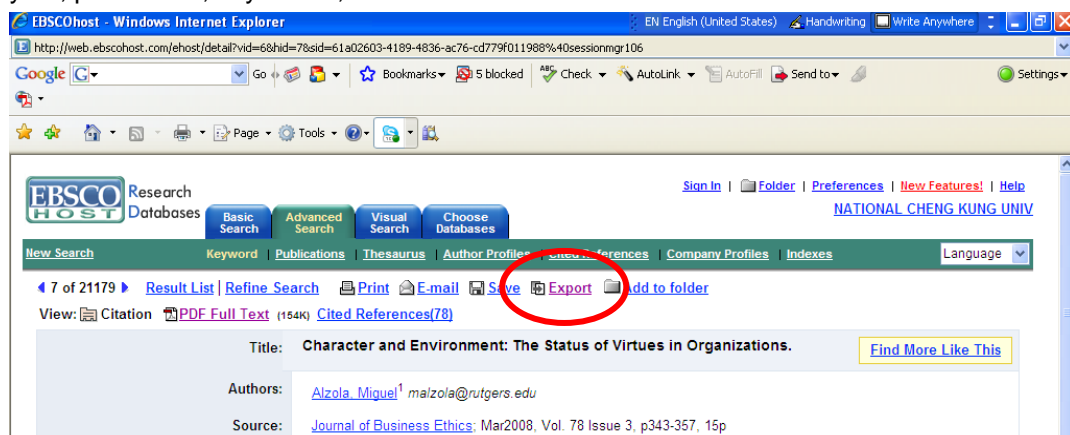
- Username: Your student number
- Password: Your library password (tends to be the last four digits of your passport number).

Search specific journals, databases etc. For business, some good databases for business articles are *SSCI (Social Science Citation Index)*, *EBSCOhost -- Business Source Complete*, *ABI/INFORM Archive Complete*, *JSTOR*, and *Wiley InterScience*.

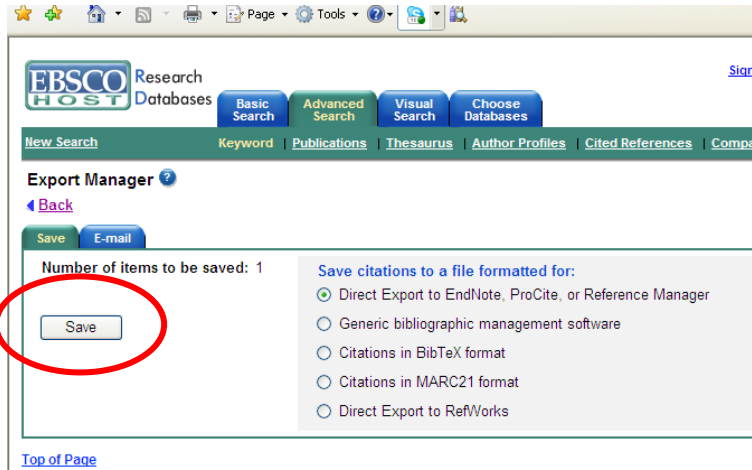
3.1.2 Downloading

When you download for example an article from EBSCO or other resource sites, you can often choose to export (download and import into EndNote) the citation as well. This means that you have two steps:

- 1) **Download the document as Full Text** (if available – this allows you to highlight and export highlighted sections in Adobe Acrobat Professional, as well as search the document for specific words, etc)
- 2) **Export the citation** information directly into EndNote. It will import information such as author, year, publication, key words, abstract etc when available:



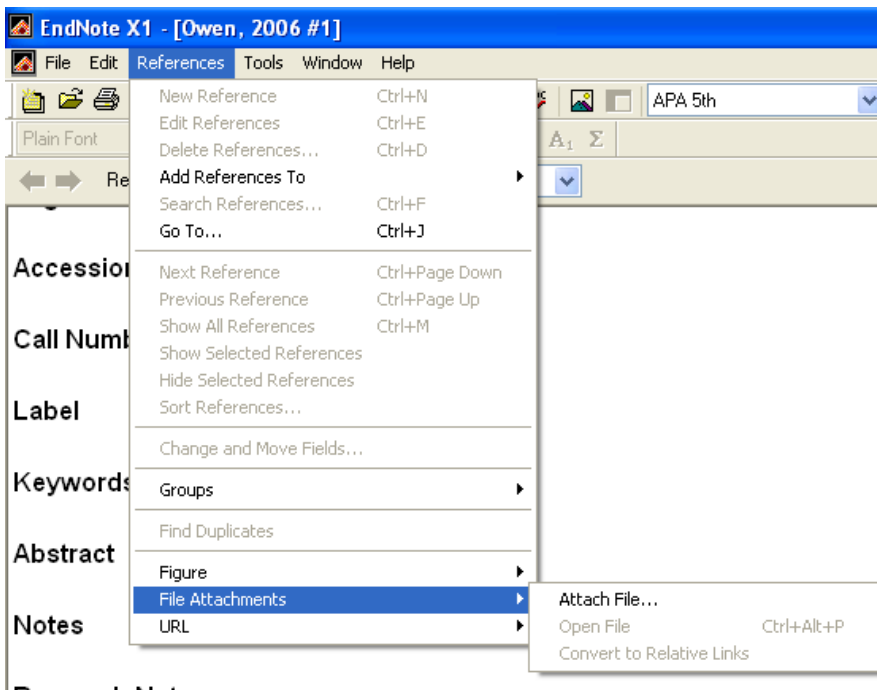
Each database has different export steps.



- 3) **Go into the reference in EndNote and ensure that all the information is formatted and entered correctly** and all the necessary information is there (authors' names, page numbers all included, title formatted correctly etc); I also enter Retrieval Date (the day you downloaded the article)

NOTE: If there is an error with the Year, you will not be able to edit it once you have inserted it into the report! You would then have to delete the citation, correct the reference in your EndNote library, and re-cite it.

- 4) **Ensure that the reference type is correct** (journal, book etc), so that when you cite it in your report it will be formatted correctly



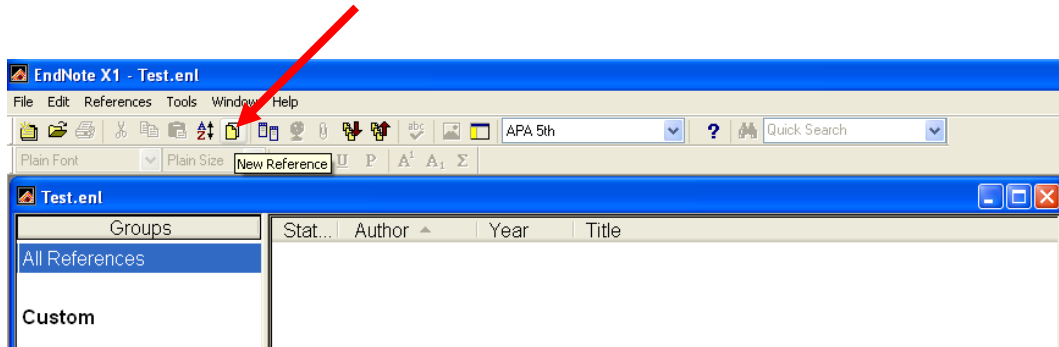
- 5) **Attach any figures or files** you like, or link them to the reference. If you attach the files and figures, the actual document is in your library. If you then share your library, the document will be shared as well. This means it takes up extra space! If you just want to link the file, you can type in the directory in the *File Attachment* location in the reference,

i.e. D:/Thesis Research/Articles/article name.doc

3.2 Manually Entering a New Reference

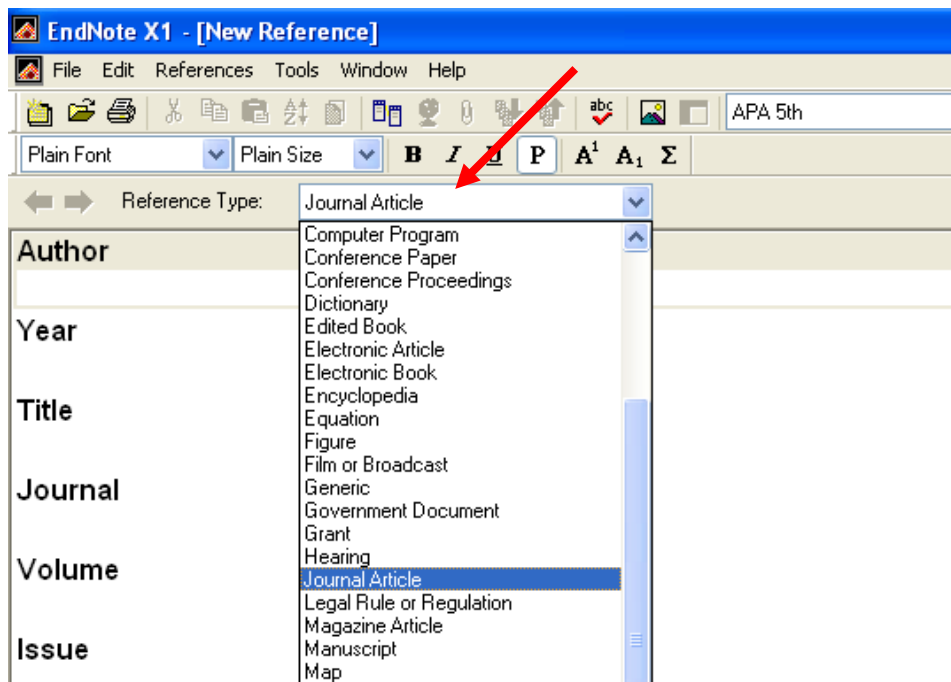
If you cannot import the citation from the online database or journal, and are not importing it from let's say an upper classman's library, then you will have to enter all the information manually:

References → New Reference (Ctrl + n); or click the New Reference Icon



First choose document type (see below), and then proceed to enter the information. If you already have the document as a Full Text Adobe Acrobat file, you can directly copy in the abstract and key words from the document itself.

Most reference types should be found in this list – if not you will have to add a reference type.



3.3 Areas that Need Special Attention

3.3.1 In General

- Do not type a period (.) at the end of anything (title, journal, author's name etc)
- Do not type a space at the end of any field

3.3.2 Authors' Names [read this part ESPECIALLY CAREFULLY! FOLLOW IT TO THE EXTREME]

- Ensure you enter the FULL first and last names of the authors
 - ♦ You can enter it both Lastname, Firstname; or Firstname Lastname, i.e.
 - John Smith
 - Smith, John
 - ♦ **Important – ensure there is no comma or space at the end of the name/line!!**
- Ensure that if there are multiple authors, **each author is entered onto separate lines** (press “enter” after each author’s full first and last names have been entered **without entering a comma or a space and before entering the next author’s name**)
- If there are multiple spelling versions of an author’s name (often happens with Chinese and Taiwanese authors, i.e. Guo-xing Huang = Guo-Xing Huang = Kuohsing Huang etc), chose one spelling method and be consistent
 - ♦ If this is not done, EndNote interprets each different spelling type as different authors and may add additional citation information in your report according to APA 5th rules which technically should not be added in this case

3.3.3 Year

Ensure you enter the year CORRECTLY – once the reference is inserted into the report this cannot be edited

3.3.4 Book and Article Title

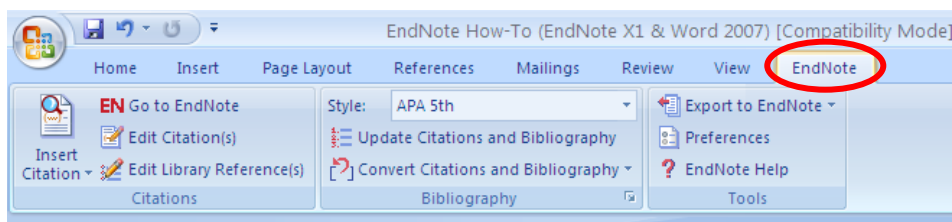
- Ensure the letter of the title is capitalized only, unless:
 - ♦ It is a word that normally gets capitalized (i.e. place names etc)
 - ♦ It is the first word after a colon (:) [meaning: Capitalize the first word after a colon (:)]

3.3.5 Journal Name

- Ensure you Capitalize Each Major Word of the Journal Name and spell it out fully

4 IN-TEXT CITATIONS

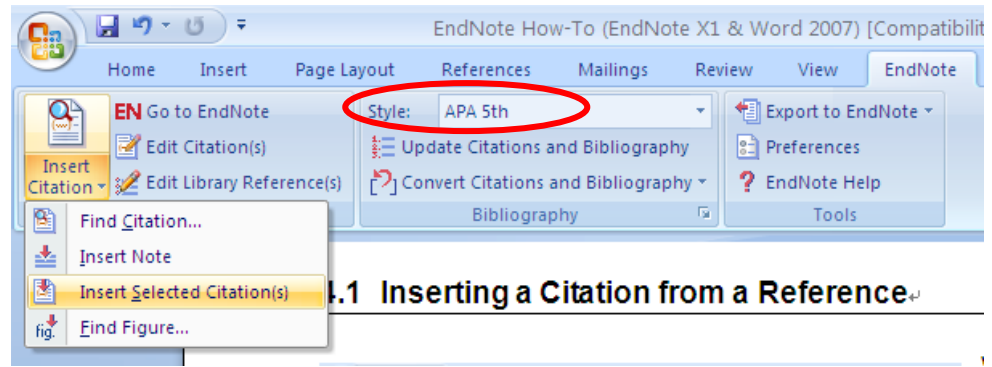
4.1 Inserting a Citation from a Reference



When you are writing your report and would like to cite a source, select the EndNote tab on the ribbon (see

Troubleshooting section below if the tab does not show up when you open Word after installing EndNote).

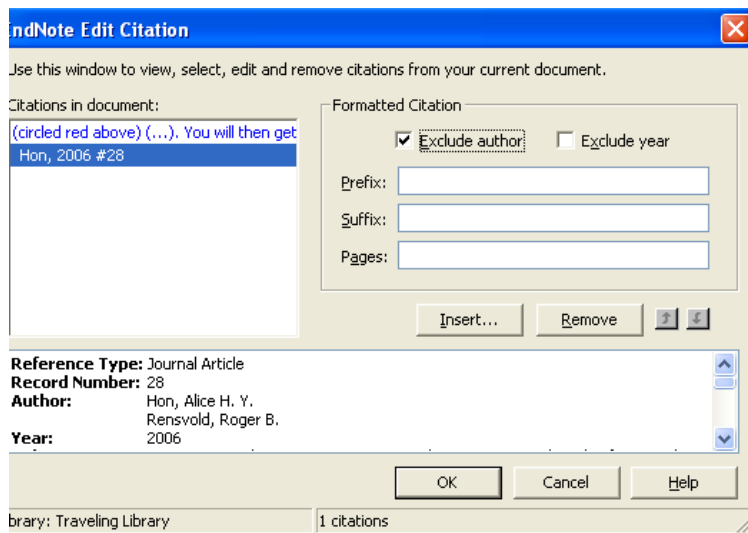
With EndNote open, and the reference you would like to insert highlighted/selected, go back to your report and hit the “Insert Citation” in the Citations section on



the ribbon, and then select “Insert Selected Citation(s).” Ensure APA 5th IIMBA style is selected (not featured above). You will then get the correct APA style citation, and at the bottom/end of your report, the reference information will appear, in APA format, in alphabetical order.

4.2 Editing the In-Text Citation

If your next source is from the same reference, as per APA style you will just need the author, not the year.



Or perhaps you are directly quoting something, and need to include the page number. After you have completed the same steps as above, you will therefore have to edit the citation. **DO NOT EDIT IT DIRECTLY IN THE REPORT** – because there is coding behind the scenes that will not be updated or changed properly, and when you update them they will revert back to their original formatting.

To edit the in-text citation, set your cursor in the citation (it will turn grey) and select “Edit Citation(s)” in the ribbon. You can then choose to omit the author or year, or add your page numbers.

4.3 Deleting an In-Text Citation

To delete a citation, delete it through the above Edit Citation window, and select the Remove button, and then OK. This will remove the citation as well as the bibliographic reference (if there are no other citations for that reference in the report). **DO NOT** just highlight the citation and delete it, as you may not have removed the coding, thus creating headaches for you later.

5 REFERENCE LIST

As mentioned above, the reference list (NOT bibliography) will automatically be loaded into the end of the report and updated to include all in-text citations used in the report. The ***difference between a reference list (which APA must use) and a bibliography***, is that the reference list only lists references that were cited in the report, while the bibliography can include other items that were not cited in the report, but influenced the report writing.

5.1 Changing Bibliography and Citation Style

If you want to use a different format than APA 5th, or your current reference list is not in this format, you can do the following:

Choose APA 5th IIMBA in the Bibliography section on the ribbon (drop-down menu on *Style*, and choose *Select Another Style*).

5.2 Correcting Errors in Reference Information

If you realize there is an error in, for example, the article title, or any area ***excluding the Author name and Year***, select “Edit Library Reference(s)” in the Citations section of the ribbon. It will take you to EndNote to edit the reference. Once you are done, you can update the bibliography in your report clicking the *Update Citations and Bibliography* button.

You can also correct it directly in EndNote first, and then select the *Update Citations and Bibliography* button.

However, if for some reason it does not update, you can first select *Convert Citations and Bibliography* → *Convert to Unformatted Citations*, and then select the *Update Citations and Bibliography* button. You will have to turn on instant formatting again (see troubleshooting below).

5.3 Moving your Reference List to another Spot other than the End of your Document

There are two methods to do this:

1. Highlight the whole reference list (it is a field-code so turns gray when you click in it), and drag-and-drop it into the desired position. Note: if you cut-and-paste it, it will lose the field-code and when you later update the bibliography again, it will create a new list at the very end of your report again.
2. Turn off Instant Formatting by either selecting *Convert Citations and Bibliography* → *Convert to Unformatted Citations*, or by following section 9.2 below, but selecting “turn off” instead of “turn

on". Then, cut the reference list (or the field code) and paste it into the desired location. Finally, turn instant formatting back on (follow the steps in section 9.2 below).

The 2nd method is recommended.

6 MOVING AND SHARING YOUR LIBRARY

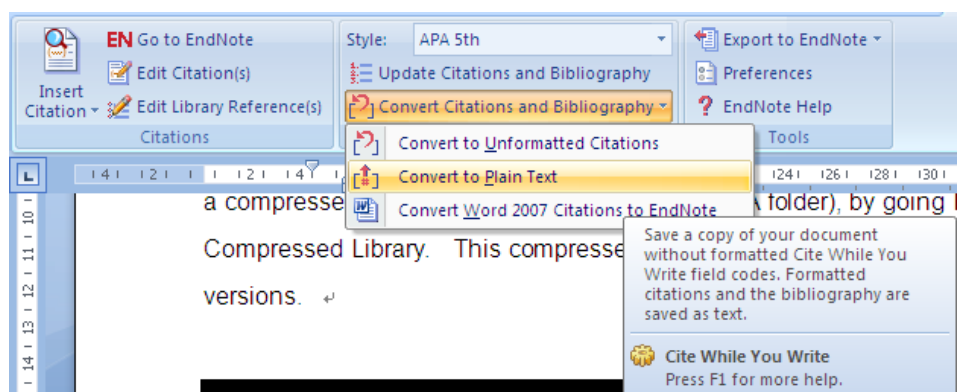
When you create a new library, a DATA folder is also created where any figures or files that you attach in the reference are stored. These two are linked, and so if you copy or move a library, you must ensure that the .enl file and the DATA folder are copied/moved together.

To back up or share your EndNote library with someone else, you can choose to save a compressed version (which will include the DATA folder), by going File → Send To → Compressed Library. This compressed file can only be opened by EndNote X or later versions.

7 SHARING YOUR REPORT

If you want to send your report to i.e. your advisor, or if you are working on a report with others, you have two options:

- 1) **Include your report and library** (either compressed library or both the .enl and the DATA folder) in the email
- 2) **Convert your citations and bibliography to plain text and save as a different file** to share with the others (the button is the same in Word 2007 and Word 2003: [#]). This will create a separate document, not linked to EndNote.



8 DUPLICATE CITATIONS IN YOUR LIBRARY

It is important to note that if you edit the reference in EndNote, and import or create a new citation for the same reference by accident, and then cite it in your report, it will be in there twice. Be careful! If you delete

one of the references, make sure that you have cleaned up the references and citations in the report first, to link to the reference that will *not* be deleted.

EndNote does have a function to search and compare your references in the library to determine whether there are duplicates (go to References → Find Duplicates), but if you have changed enough aspects in the references, it may not be guaranteed it will find the duplicates.

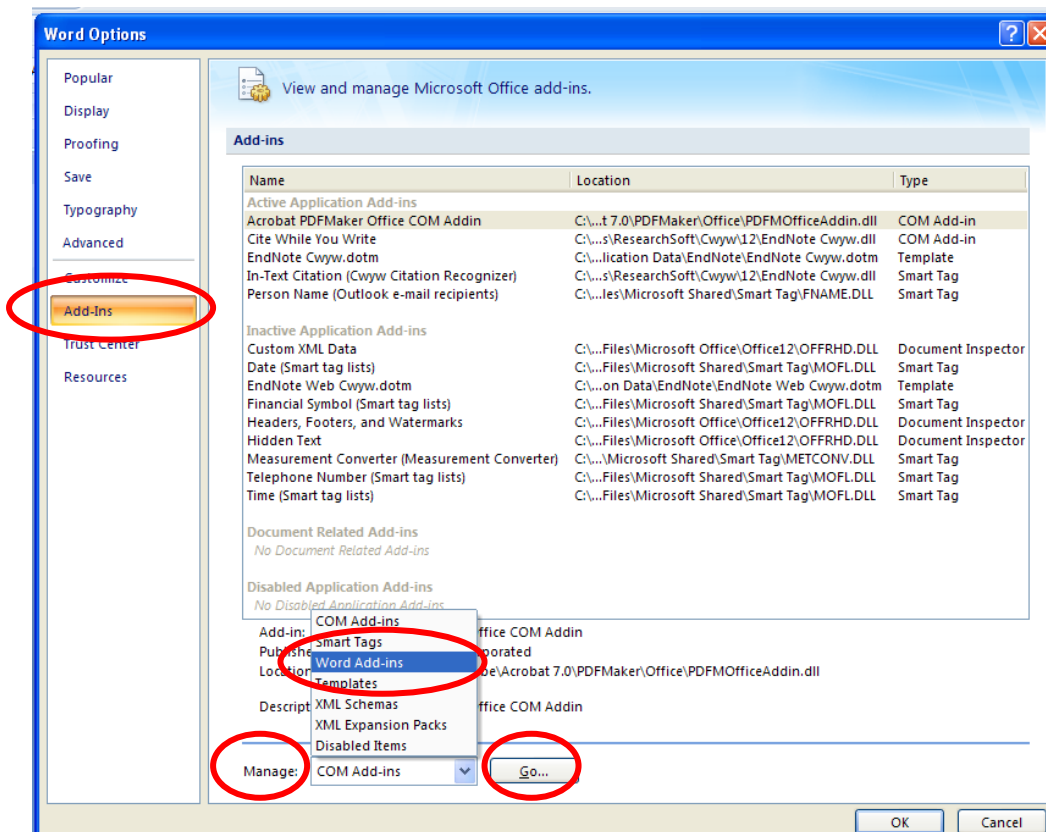
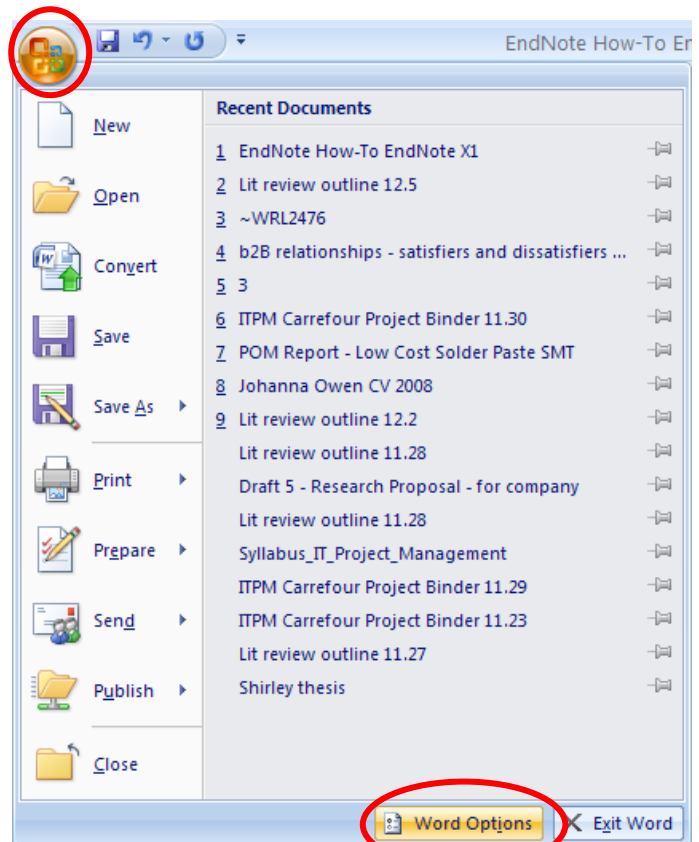
9 TROUBLE SHOOTING

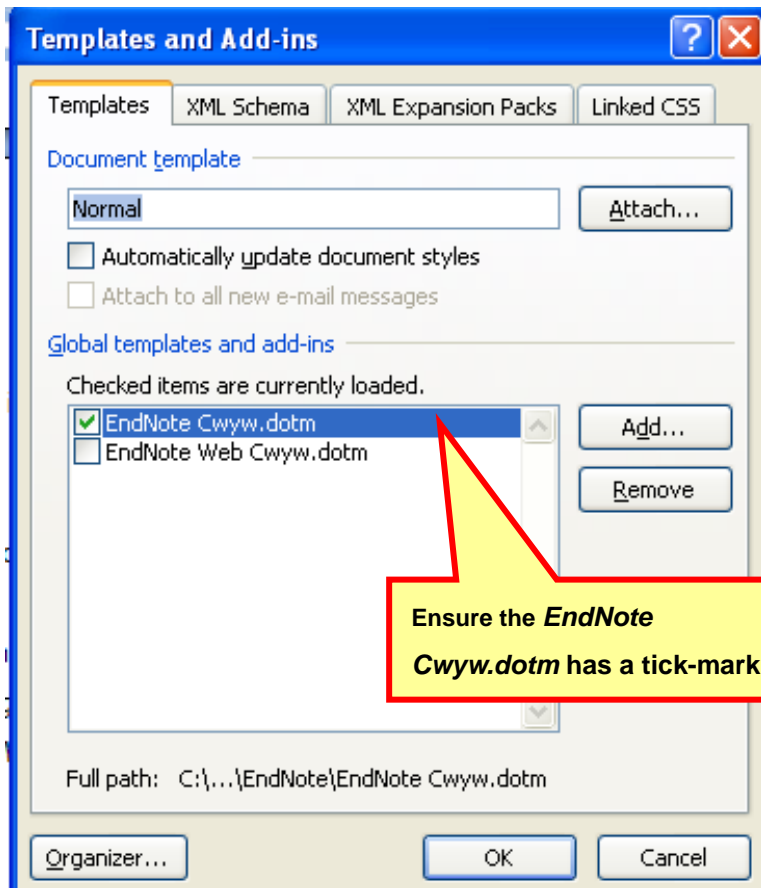
9.1 EndNote tab not showing up in Word 2007 Ribbon

Sometimes when you install EndNote the tab in the ribbon on MS Word 2007 does not show up.

If you installed a version earlier than EndNote X1 (or X...can't remember), **it is incompatible with Office 2007 and you must install EndNote X1 or a later version!** If the tab is still not showing up, it is an easy fix:

Go to your Word Options → Add-ins → select "Word Add-ins" under the *Manage* drop-down menu, and select *Go* (see figure below).

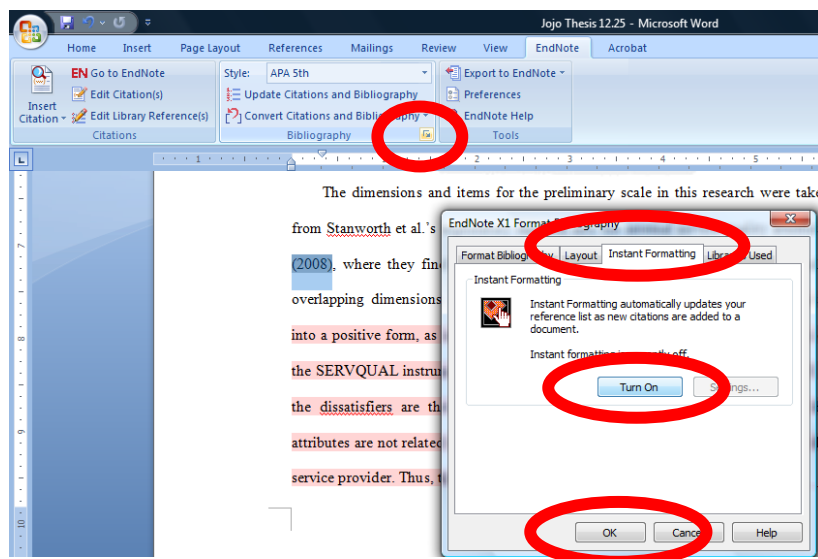




9.2 Turning Instant Formatting Back On – {Author, 2007 #2}:

If you convert your citations and bibliography to unformatted citations, ie because you are:

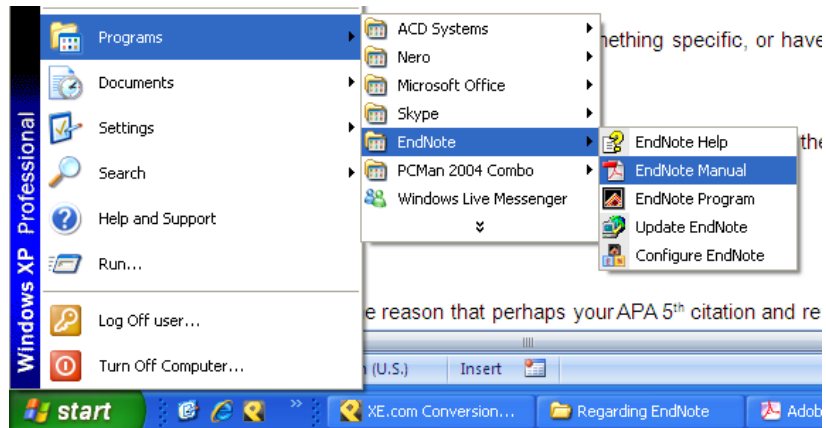
1. searching your citations to find a specific one since you have realized you have cited the same reference from two different libraries, and it is messing up your citations and references so you want to fix it, or
2. you wish to move your reference list up to another position besides the very end of your paper, you need to turn on the instant formatting again, so that the citations don't show up as {Author, 2007 #2}:



9.3 Looking for a specific function or questions in general

If you are wondering if EndNote can do something specific, or have questions about anything, first search *Help* in EndNote.

You can also look through the EndNote manual that is loaded onto the computer when you install EndNote (*Start – Programs – EndNote – EndNote Manual*).



There are also tutorials for general use and some trouble shooting to be found at <http://jojoediting.services.officelive.com/tutorials.aspx> on the *tutorials* tab, as well as a schwack-load of tutorials on youtube (search word: EndNote).

10 ENDNOTE AS AN ORGANIZATIONAL TOOL

You can enter your thoughts or ideas into the reference in EndNote after reading the article or book or whatnot (i.e. in the Research Notes section). This way, after reading 100 articles, books etc, and you remember there were three or five or ten that were on a certain topic or that were related to a certain thought of yours, you can open your library, do a search, and those references will be short-listed. You will then know which articles they were, and can go back to the articles themselves and use the information in your report.

On a last note, EndNote is only as smart as you are. If you use it with care, your research and report writing should be able to be done with more efficiency and ease.