

2001

An instructional course in using Endnote and the Central Reference System

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Publication details

Newell, S 2001, 'An instructional course in using Endnote and the Central Reference System', paper presented to Southern Cross Institute of Health Research Seminar, Lismore, NSW.

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Instructions for Using Endnote & Central Reference Getting System

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Instructions for Using Endnote

What is Endnote?

Endnote is a software package that works as a database, where you can store the information for all your references – it means never having to type another reference list for a report or paper again!!

Why Use Endnote?

Using a package to manage your references will save you heaps of time in the long run – you'll be able to tell almost instantly whether we have a certain reference in the building and, if we have, where to find it. So we can try to minimise the duplication of references (to save money & trees) within the Division of Population Health and the Institute, we're trialing a system of putting all our references into one shared Endnote database stored at **P:\shared\publiclendnote\REFS.enl** and keeping a master copy of each reference in a central filing cabinet – so they're available to everyone.

How to Use the Centralised Reference Getting and Filing System

As we need to manually check that none of the references to be entered are already in the database and the database needs the information to be entered in a standardised, and often very specific, way, it is preferable to have as few people as possible entering references into the database. Therefore, a centralised system for getting and entering references has been set up – it also helps to reduce people's administrative workload.

To use this system:

1. Do your literature search as normal and decide which references are of interest to you. If you simply have a reference that you would like to get or some old ones you would like entered into the database, refer to the relevant section below.
2. **Getting references:** Decide which journal references you would like to have a full copy of – put their details in the "References to Get" tray on top of the References filing cabinet – you need to specify the project they are for (for use when sorting the database) and your name (so the references can be given to you when they come in). As we have limited resources and people tend to need less books, we'll trial people organising their own book inter-library loans.
3. **Having references entered:** Decide which, if any, references you would like to be able to cite (from the title or abstract) but do not need to get a full copy of – put their details straight into the "References to be Entered" tray on top of the References filing cabinet – again, you need to specify the project they are for (for use when sorting the database) and your name (so the references can be given to you when they come in). Any old references that you already have and would like entered into the database should also be put in this tray. If you get inter-library loans back that you want to put in for data entry, please don't remove the library's coversheet as some of the information we need to enter may not be some journal articles.

Entering New References into the REFS Endnote Database

As this centralised entry of references will be done only weekly or when admin staff have some spare time, you may sometimes need to enter a few references yourself if you need to use them urgently. If so, **please read the following instructions carefully** as – if you don't follow these instructions, your references may not come out how you expect in your papers or reports.

Opening the Database

1. Double-click on the Endnote shortcut icon on your computer screen (see Sallie if you don't have an icon) and the program will open. If you try to open the **REFS.enl** file when someone else is already using it, you'll get the following error message "FILE ALREADY OPEN FOR WRITING & CANNOT BE OPENED AGAIN" – if this happens, you'll need to wait until the other person has finished using Endnote or negotiate to use it if you only need it briefly.

2. The REFS.enl file should open automatically but, if it doesn't, open it using the above name and path. (Click on "FILE" & then "OPEN" & then browse to locate the REFS.enl file)
3. Ensure that the record numbers are showing for the database – a "#" followed by a number should appear after each reference's publication year. If these numbers are not showing, simply click on "SHOW RECORD NUMBERS" from the "EDIT" menu and they will appear, as if by magic.

Checking for Duplicates

4. Unfortunately, Endnote doesn't automatically check to make sure new references entered don't duplicate existing references in the database. So, **before you start to enter any references**, you need to compare the references you plan to add to the database against those already in it. The best way to do this is to:
 - Sort the database by author, if it isn't already - select "SORT LIBRARY" from the "REFERENCES" menu, click on the "INSERT FIELD" button and select "AUTHOR" and click the "SORT" button.
 - Put the references you want to enter into alphabetical order, by first author.
 - Quickly run down the list of current database references to check whether any of yours are potential duplicates. If you get a match on the first author's name, simply check the year and title of the reference with those shown in the existing database.
 - If it's a match, simply write the already-assigned record number on the top right-hand corner of the reference – in black pen.
 - If it's not a match then you can add the reference to the database, using the following instructions.

General Rules

- Use the tab key to move between the data entry fields, when entering references.
- Don't enter any punctuation unless the instructions tell you to do so.
- **NEVER** delete or over-write a reference in the HIP database - when references are deleted, so is that record number – FOREVER! This is why it is really important to always follow step 5 above – to prevent duplicate references being entered.
- As only one person can use the database at a time, please always close down the REFS.enl file if you take a break – in case other people are trying to use it.
- If in doubt about anything in these instructions or if you want to know how to do other things, talk to Sallie.

Entering the References

To add a new reference to the database:

1. Click on "REFERENCES".
2. Click on "NEW" (or press the CTRL & N keys simultaneously).
3. This will bring up a "NEW REFERENCE" dialogue box asking for the author's name but first you need to think about (and choose) the type of reference you want to enter – then refer to the table on the next 3 pages to guide you in what information to enter and how to enter it, depending on the type of reference.
4. When you've entered the required information, simply click on the X in the top right-hand corner of the dialogue box – this will both save the new reference to the database and return you to the main list.
5. Now remove any inter-library loan cover sheet (and put it in the recycling) and record the record number assigned to the reference by Endnote (shown in the main list) - by writing and circling (in red pen) a # and the number on the top right-hand corner of the reference.

Managing the Hard Copy References

- If you do enter some new references into the REFS.enl file, please photocopy the numbered reference (for you to keep) and file the original (with the red reference #), unstapled and in a plastic sleeve in the correspondingly numbered manilla folder in the References filing cabinet.
- If you submit references for entry, this will be done for you and you'll simply receive the copied version.
- If the reference you're entering is a whole book, report or thesis and you don't want to file it in the filing cabinet, please make a copy of the title and copyright information pages for the file – and make a note on them where the full version is stored – ie: who's room or which magazine box on the shelves next to the References filing cabinet.

GUIDE TO ENTERING REFERENCES – WHAT TO ENTER & HOW TO ENTER IT

Entry Fields (use tab to move between)	What to Enter	Reference Type								
		Journal Article	Whole Book	Book Chapter	Edited Book	Conference Proceeding	Thesis	Report	Computer Program	Web Site
Reference type	Select the type of reference from the list of possibilities – main ones shown →	Journal article	Book	Book section	Edited book	Conference proceedings	Thesis	Report	Computer program	Web site
Author <i>(Press CTRL & 1 for list)</i>	To select from the existing list of authors, type the 1 st letter of the surname and scroll to find it. If it's not in the list, type each author's surname followed by a comma & then each initial followed by a fullstop – then press ENTER to get another line for each extra author. ie: Surname,A.B. Bloggs,G.H. Where the author is an organisation, type a comma at the end of the name. ie: World Health Organisation,	✓	✓	✓		✓	✓	✓	✓ (in Programmer field – will usually be an institution)	✓
Year	The 4-digit year the reference was published.	✓	✓	✓	✓	✓	✓	✓	✓	✓
Title <i>(for editorials, letters,etc: include type in brackets at end of title)</i>	The full title of the reference – using the extra instructions, by reference type. DON'T type a final fullstop – it will be inserted automatically. But DO type any other punctuation in the title (eg: colons, questions marks and any mid-title fullstops).	✓ (Use initial capital for 1 st word only)	✓ (Use initial capitals for all main words)	✓ (Use initial capital for 1 st word only)	✓ (Use initial capitals for all main words)	✓ (Use initial capital for 1 st word only)	✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)
Journal <i>(Press CTRL & 1 for list)</i>	To select from the existing list of journals, type the 1 st letter of the journal name and scroll to find it. If it's not in the list, type the journal name exactly as it appears on the reference or citation (either full or abbreviated format). If the journal name contains the word “and” – always enter this using the “&” symbol, not the word.	✓ (Use initial capitals for all main words)								
Volume	The volume number of the journal where the reference was published.	✓				✓				
Issue <i>(optional)</i>	The issue number of the journal where the reference was published, if known.	optional								
Pages	The full start and finish pages of the reference, separated by a hyphen. ie: 2345-2356	✓				✓				

GUIDE TO ENTERING REFERENCES – WHAT TO ENTER & HOW TO ENTER IT

Entry Fields (use tab to move between)	What to Enter	Reference Type								
		Journal Article	Whole Book	Book Chapter	Edited Book	Conference Proceeding	Thesis	Report	Computer Program	Web Site
Editor	Each editor's surname followed by a comma & then each initial followed by a fullstop – then press ENTER to get another line for each extra editor. ie: Surname,A.B. Bloggs,G.H. Where the editor is an organisation, type a comma at the end of the name. ie: World Health Organisation,			✓	✓					
Book title	The title of the whole book containing the referenced chapter. DON'T type a final fullstop – this will be inserted automatically. But DO type any other punctuation in the title (eg: colons, questions marks and any mid-title fullstops).			✓ (Use initial capitals for all main words)						
City or Conference location	The city where the book was published (usually found near the copyright information), where the conference was held or where the student's University is located.		✓	✓	✓	✓	✓	✓	✓	
Publisher	The company who published the book or the computer program - also found near the copyright information.		✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)			✓ (Use initial capitals for all main words)	
Edition	The edition of the book, if more than one has been published - also found near the copyright information.		if 2 nd + - type number & letters (ie:2 nd)	if 2 nd + - type number & letters (ie:2 nd)	if 2 nd + - type number & letters (ie:2 nd)					
Conference name	The name of the conference. DON'T type a final fullstop – this will be inserted automatically. But DO type any other punctuation in the title (eg: colons, questions marks and any mid-title fullstops).					✓ (Initial capitals for all main words)				
University or Institution or Producer	The name of the student's University, of the Institution commissioning the report or of the person or organisation producing the web site.						✓ (Use initial capitals for all main words)	✓ (Use initial capitals for all main words)		✓ (Use initial capitals for all main words)

GUIDE TO ENTERING REFERENCES – WHAT TO ENTER & HOW TO ENTER IT

Entry Fields (use tab to move between)	What to Enter	Reference Type								
		Journal Article	Whole Book	Book Chapter	Edited Book	Conference Proceeding	Thesis	Report	Computer Program	Web Site
Report number	The catalogue number given to the report by the commissioning institution, if known.							optional		
Version	The version number of the program - usually found near the copyright information.								✓	
Site address	The full Internet address of the web site.									✓
Access date	The date you accessed the web site.									✓
Last update date	The date the web site was last updated when you accessed it.									✓
Thesis type	The type of degree associated with the thesis – ie: Masters or PhD.						✓			
Project used (Custom 1) <i>(Press CTRL & 1 for list)</i>	Select the code name of the project the reference is being entered for from the list. The project name should be specified when submitting refs for entry. If your project code name is not in the list, see Sallie to add it. When adding a second + project name to a ref, use hard returns to separate them.	✓	✓	✓	✓	✓	✓	✓	✓	✓
Where stored (Custom 2)	Type a brief description of where the full reference is stored – eg: Avigdor's room.		✓					✓		
Keywords	This is the field to use if you want to categorise your references within a project – type in each keyword on a separate line or specify any keywords you'd like included when submitting references for entry.	optional	optional	optional	optional	optional	optional	optional	optional	optional
Abstract	Preferably nothing - but abstracts can be entered here – mainly for use if importing references from Medline, etc.									
Notes <i>(Press CTRL & 1 for list)</i>	Use the list to select the term that describes the nature of the reference you're entering. If none of them fit your reference, see Sallie to add another term.	✓ (title only, abstract only or full article)	✓ (title only or full book)	✓ (title only or book chapter only)	✓ (title only or full book)	✓ (title only, abstract only or full article)	✓ (title only or full thesis)	✓ (title only or full report)	✓ (computer program)	✓ (title only or web page)

When you've Finished with Your Copy of References

When you've finished writing your paper or report and no longer need the hard copies of the references you've been using, simply put them in the tray labelled "References to be Filed" tray on top of the References filing cabinet and they'll be filed away as spare copies in case anyone else wants to use them in the future.

Sorting the References in the Whole Database

The references in the database can be sorted using any of the data entry fields. The most common needs are to sort the list by first author to give an alphabetical list of the references by author or to sort it by record number to give a numerical list. To sort the whole database:

1. Click on the "REFERENCES" menu
2. Click on "SORT LIBRARY".
3. Click on the "INSERT FIELD" button, select the first field you want to sort on and click on the icon at the right to indicate whether you want to sort in ascending or descending order. Repeat these last two steps if you want a multi-level sort.
4. Click the "SORT" button.

Pulling out Sub-groups of References from the Database

You may want to see or print off a list of a sub-group of the references in the whole database – eg: those used in a given project or those by a certain author. To do this:

1. Click on the "REFERENCES" menu.
2. Click on "SEARCH".
3. Click on the first box saying "ANY FIELD", select the field in which you want to specify a sub-group and then type the term you're after in the box above. Repeat these steps in the remaining boxes if you want to specify a sub-group based on multiple fields or terms and select the appropriate linking term – ie: "AND", "OR" or "NOT".
4. Click on "SEARCH" and you will be taken back to a screen displaying a list of references – at the top it will tell you how many references are in the sub-group you've selected.

Printing Lists of References from Endnote

1. First you need to decide how you want the printed list to appear. If you want it to include the reference numbers, you need to use the "SHOW_ALL" style – to do this, click on the "STYLES" menu and click on "SHOW_ALL.ENS" if it is in the list (if it has a tick next to it, it's already selected and you don't need to do anything). If "SHOW_ALL.ENS" is not in the list, click on "SET STYLE FOLDER" and set the folder to "P:\shared\public\endnote\styles" and click on "SELECT FOLDER". Now you should be able to select the "SHOW_ALL.ENS" format from the "STYLES" menu. If you want to print the list off without reference numbers but in a journal format, select the relevant sub-folder from the "P:\shared\public\endnote\styles" directory – this will usually be the "MEDICINE" or "PUBLIC_HEALTH" folder – then when you look under the "STYLES" menu, you'll see a variety of journal formats to choose from.
2. Select the references you want to print off – to print the entire list use the "SELECT ALL" option under the "EDIT" menu or, if you want only a subset, follow the instructions in the "Pulling out Sub-groups of References" section above.
3. When the result of your search appears, think about whether you would prefer the references sorted in any specific way – eg: alphabetically by author or in numerical order by their record numbers.
4. If you want to sort them into an order other than the one they're already in, select "SORT LIBRARY" from the "REFERENCES" menu and click on the "INSERT FIELD" button to pull down the list of fields you can sort on and select which you want – it would usually be either author or record number. You can use multi-stage sorting techniques if you wish – ie: sort by author and then by year of publication. If you don't care about the order of your print-out, simply move on to step 4.
5. Then you can simply use the "PRINT" command from the "FILE" menu to print the references.

Merging References into a Document

This is one of Endnote's most useful features – by using the Endnote reference numbers to insert references into a document, Endnote will automatically insert the appropriate citations into the text of the document and generate a corresponding bibliography for the document. There are two steps to achieve this – firstly, inserting the reference numbers into your document and, secondly, generating the actual citations and bibliography – these are described below.

Inserting the Reference Numbers

When you're preparing a paper or report, to insert a reference at a given point, type a # and the corresponding reference number (from the top right hand corner of the front page of the reference) inside square brackets – eg: [#123]. If you want to cite multiple references at the same point, type all the relevant reference numbers into the brackets, separated by semi-colons – eg: [#123;#234;#255]. You don't need to have the Endnote program open to insert references in this way.

Generating a Bibliography – Vancouver Style (numerical in-text citations)

When you're ready to generate the bibliography and numerical in-text citations for a document, you'll need to:

1. Have the document open in your word processing package.
2. Open the Endnote program and the REFS.ENL database.
3. Select the style in which you want the citations and bibliography formatted - click on the "STYLES" menu, click on "SET STYLES FOLDER, select the relevant sub-folder from the "P:\shared\public\endnote\styles" directory – this will usually be the "MEDICINE" or "PUBLIC_HEALTH" folder, click on "SELECT FOLDER", then click on the "STYLES" menu again and select the relevant journal from the list.
4. Go back into your text document and click on the "TOOLS" menu.
5. Click on "FORMAT BIBLIOGRAPHY" – if it's not there, click on "GO TO ENDNOTE" and it should appear.
6. Check the journal you've selected is that indicated and, assuming it is, click on "FORMAT".
7. You'll see a number of messages flash up as Endnote scans the document, inserts the citations and creates the bibliography. At the end, it should all be done, with the citations (numerical or author and year) inserted into the text of your document and the bibliography added onto the end of the document.
8. You'll probably need to scan the resulting bibliography for any minor formatting problems and run a final spellcheck of your document – but this shouldn't take more than a few minutes unless you've got hundreds of references in the document.

Generating a Bibliography – Harvard Style (author & year in-text citations)

Unfortunately, it's a bit more complicated if you want to generate Harvard style (author, year) in-text citations for a document, when you'll need to:

1. Have the document open in your word processing package.
2. Open the Endnote program and the REFS.ENL database.
3. Select the style in which you want the citations and bibliography formatted - click on the "STYLES" menu, click on "SET STYLES FOLDER, select the relevant sub-folder from the "P:\shared\public\endnote\styles" directory – this will usually be the "PSYCHOLOGY" folder, click on "SELECT FOLDER", then click on the "STYLES" menu again and select the relevant journal from the list.
4. Now you need to scroll through the text of your document and convert each reference citation (set of square brackets with reference numbers) into a full endnote citation. To do this:
 - You'll need to print a hard copy of the text of your document.
 - Using this print out, you'll need to do each of the following steps for each reference citation (or group of references):
 - In endnote, sort the REFS.enl database so it's in numerical order (click on the "REFERENCES" menu, then on "SORT LIBRARY", then on the "INSERT FIELD" button, select "REFERENCE TYPE" and click the "SORT" button.
 - Highlight all the references in your first citation – if there are multiple references, hold down the "CTRL" key while you click on each needed reference.
 - Go back to your text document and highlight, including the square brackets, the first citation.
 - Click on the "TOOLS" menu and then on "INSERT CITATION(S)" and the name of the first author, the year and the # of each reference should appear.

- Then repeat this process for every in-text citation.
- 5. When you've inserted all the full citation, go back into your text document and click on the "TOOLS" menu.
- 6. Click on "FORMAT BIBLIOGRAPHY" – if it's not there, click on "GO TO ENDNOTE" and it should appear.
- 7. Check the journal you've selected is that indicated and, assuming it is, click on "FORMAT".
- 8. You'll see a number of messages flash up as Endnote scans the document, inserts the citations and creates the bibliography. At the end, it should all be done, with the citations (numerical or author and year) inserted into the text of your document and the bibliography added onto the end of the document.
- 9. You'll probably need to scan the resulting bibliography for any minor formatting problems and run a final spellcheck of your document – but this shouldn't take more than a few minutes unless you've got hundreds of references in the document.

Moving a Bibliography

If you don't want the bibliography at the very end of your document – for example, if you have tables or appendices that should go after the bibliography, you can simply cut and paste it to where you want it – but you need to do it with your reveal codes option on and ensure that you get the hard returns before and after the bibliography in your selection for cutting and pasting. If you do this, Endnote will modify the bibliography in its new location if you need to reformat your bibliography.

Modifying a Bibliography After You've Generated it

Sometimes you may want to add or delete some references after you've generated your bibliography or you may need to change the bibliography style to resubmit the document to another journal – this isn't a problem.

Adding Extra References

To add extra references into a document, simply follow the steps above – typing the reference number to be added, preceded by a # and in square brackets at the point you want it inserted. If you want it inserted into an existing group of references, simply type the [#123] at the end of the existing group of citations. When you've finished adding the extra references, click on "TOOLS" and "FORMAT BIBLIOGRAPHY" and, assuming you want to keep the same style, click on "FORMAT" and the citations and references will be modified accordingly.

Deleting References

To delete a reference, you'll need to select the text and citations including it and then click on "TOOLS" and "UNFORMAT CITATIONS" – you'll see it will revert to the square brackets with hashes and reference numbers. Then just delete the reference number you don't want and click on "TOOLS" and "FORMAT BIBLIOGRAPHY" and, assuming you want to keep the same style, click on "FORMAT" and the citations and references will be modified accordingly.

To Change the Style of the Bibliography

Simply repeat Step 3 of the "Generating a Bibliography" section above to select the new style you wish to use and then repeat the remaining steps in that section to revise your text document's formatting.

Using Endnote at Home

As I've done quite a bit of customising to the basic Endnote format – to make things easier for us, anyone wanting to install and use Endnote at home will also need to make sure to take a copy of the preferences file (ENDNOTE.ENP) and install it in their C:\WINDOWS directory – or the program will look quite different when you open it.