

CREATING, ORGANIZING AND USING YOUR PERSONAL RESEARCH LIBRARY WITH ENDNOTE

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Part 1: Creating Your Personal Master Library

Open the EndNote program. In the “Getting Started with EndNote” window, click “Create a New Library.” Browse to drive or folder in which you want to store your library, name your library and click Save. Your personal master library now is ready to use.

Next, select the citation style you will be using. Click on the Edit drop-down menu, select Output Styles and then select Open Style Manager. The current version of EndNote includes more than 3,300 citation styles, which can be sorted by academic discipline. For this training session, find “Chicago 15th B” and click on the check box to select. Close the Style Manager. The style you checked now should be displayed in the Bibliographic Output Style window in the top toolbar.

Part 2: Adding Sources to Your Master Library

EndNote provides three ways to add research references to your master library:

1. Manually: typing information into your EndNote library
2. EndNote filters: downloading from online indexes using the indexes’ search functions
3. EndNote connections: downloading directly from online indexes and library catalogs using EndNote’s search functions. This method will not be addressed in this guide.

Manual entries

This approach is slow but valuable in several ways. First, many useful sources cannot be downloaded directly into EndNote and so can be included in your personal library only if you add them manually. Second, if problems arise while downloading resources into your EndNote library, you always can turn to manual entry as a backup. Third, downloaded entries frequently need manual editing for correct citation style.

To create a manual entry:

1. Click on the New Reference icon.
2. Select the appropriate reference type (click the down arrow to see the available choices).
3. Using the training examples below, enter the bibliographic information for each reference, leaving unneeded fields empty.
 - a. Author’s names can be entered Last Name, First Name or First Name Last Name.
 - b. Do not use quotation marks, underlining or italics for titles, as the style you have chosen will select the proper format.
 - c. The style you select will determine capitalization of the title (sentence style,

- headline style or as-entered).
- d. If your reference has more than one author or editor, hit Enter after each name so that each author's name is on a separate line. If your reference has a corporate author (e.g., an organization or governmental unit), end the corporate author's name with a comma. If the author has a suffix (e.g., Jr.), place a comma after the last name and another comma after the first name (e.g., Anderson, Karl, Jr.).
 4. Close the reference and check the preview for accurate Chicago 15th B style. Your previews should appear the same as the examples below.
 5. References can be reopened for editing by double-clicking or by highlighting and then hitting Enter.
 6. When you have completed these sample entries, change the current bibliographic output style to Turabian and look at these entries in the preview screen, noticing the changes to the citation style.

Journal article

Perry, Elizabeth J. 2008. Chinese Conceptions of "Rights": From Mencius to Mao-and Now. *Perspectives on Politics* 6 (1):37-50.

Book

Dryzek, John S. 1990. *Discursive democracy: Politics, policy, and political science*. Cambridge: Cambridge University Press.

Edited Book

Atkins, Peter, and Ian Bowler. 2001. *Food in Society: Economy, Culture, Geography*. New York: Oxford University Press.

Book Section

MacCallum, Gerald C., Jr. 1991. Negative and Positive Freedom. In *Liberty*, edited by D. Miller. Oxford: Oxford University Press.

Downloaded entries

The most useful option for downloading sources into your personal library will be through EndNote filters. These filters allow you to search online indexes to which UMM has subscribed, save the results of those searches and then download those results into your EndNote library. Academic Search Premier, JSTOR, CSA and WorldCat are among the many subscription indexes with EndNote filters that are likely to be useful to your research.

For this training session, go to the library's home page and click on Article and Reference Databases. Go to one of the following indexes: JSTOR, Academic Search Premier, PAIS or WorldCat. Conduct a search that results in more than one source and download it to your EndNote master library, using the following process:

- JSTOR: Click "Save Citations." You will need to create or log into your JSTOR account to download citations. You will see a number of Saved Citations beneath your name; click on that link. Select the records you want to download and click "Export article citations." Select the EndNote option and click on Save. The saved file will be named "citations.ris." Go to your EndNote library. Click the Import icon and select the file you just saved. Choose Other Filters under Import Options and select the JSTOR filter. Click Import.
- Academic Search Premier: Click on "Export to Bibliographic Manager," "Direct Export to EndNote" and then Save.
- PAIS: Click "Save/Print/Email," choose PC or Mac file format and click "Save,"

select “Save this file to disk” and click OK. Go to your EndNote library. Click on the Import icon, select the file you just saved, choose “other filters” under Import options and select PAIS (CSA). Click Import.

If time allows, complete a search and download to your EndNote library in each of these indexes.

Troubleshooting hints:

- If you find that your selections are not downloading correctly into EndNote, try using a different browser. JSTOR sometimes works better with Firefox, for example.
- When you download references into your EndNote library, only those downloaded selections show up on your screen. This gives you the opportunity to review and modify them. When you are ready to see all of the references within your library, click Control-M (or References>Show All References).

Part 3: Creating Stand-Alone Bibliographies

Using EndNote and word processing software, we can create “independent bibliographies” that stand alone without an associated paper. These bibliographies can be designed to include only the citation itself or we can customize them to include additional information such as annotations. To create a stand-alone bibliography, highlight several references in your EndNote library, hold down the Control key and then drag-and-drop the highlighted references into a word-processing document. The references will be in alphabetical order in the citation style selected for your EndNote library. Once you are familiar with using EndNote, you will be able to customize EndNote styles for specialized bibliographies that include annotations, research notes, etc.

Troubleshooting hints:

- If you do not hold down the Control key, EndNote will transfer an “unformatted” version of your references.
- If you do not transfer all of your references at the same time, EndNote will not be able to alphabetize them.

Part 4: Citing as You Write

EndNote includes a “cite-as-you-write” function that allows you to insert citations in a selected style from your personal research library. At the same time, EndNote creates a reference list at the end of your paper that includes all cited sources, listed alphabetically in the same citation style.

Inserting parenthetical (author-date) references

Open your EndNote library and a Word document. Point your cursor to the place in your paper that you want the first citation to appear. In Word, go to the EndNote toolbar and click on the Find Citation(s) icon (or use the drop-down Tools menu). In the Find box, type in one or more words to identify the source you wish to cite and click Search. EndNote will search all fields in your open library’s records and list the matching references. Select the

reference you wish to cite and click Insert. EndNote's cite-as-you-write feature automatically will convert your in-text citation into Chicago 15th B style and generate a reference list as you continue to write and cite. Save your Word file frequently.

An alternative approach: In EndNote, highlight the reference(s) you wish to cite and click on the Insert Citation icon.

An important cautionary note: All revisions to your citations and reference list should be done within your library in EndNote, not in your Word document. Typing revisions directly into the citations and/or reference list in Word may corrupt your document.

Inserting note (bibliographic) references

If you wish to use a note citation style (with endnotes or footnotes rather than in-text parenthetical references), choose a note style (such as Chicago 15th A) before you begin writing. When you want to cite a source, insert a reference and then insert the citation within the endnote or footnote as directed above. Some but not all note styles will produce a works-cited list in addition to the citations within the footnotes or endnotes.

Inserting multiple references into one citation

In some circumstances, you may want to cite more than one source within the same citation. To do so, hold down the Control key while selecting the desired references and insert them all at the same time. EndNote will insert them as one multiple citation, sorted in alphabetical order.

Editing citations and adding page numbers

Citations often need to be modified to include or exclude information. To do so, click on the citation you wish to edit. In Word, click the Edit Citation(s) icon select the citation you want to edit.

- Adding prefixes and suffixes: In some cases, it is appropriate to add words such as “for example” or “see” before the author’s name within the citation. Use the Prefix box to include these words. Suffixes also are possible but are less commonly used. Spaces are significant.
- Adding page numbers: When you are citing a specific page or section in your source, type the page numbers into the Pages box. For some citation styles (including Chicago 15th B), it is necessary to type a comma, space and appropriate page numbers into the Suffix box rather than the Pages box).
- Excluding the author’s name: If the author already has been identified within the sentence preceding the citation, check the Exclude Author box.
- Excluding the author’s name and year of publication: If the author and year of publication have been fully identified in the sentence preceding the citation and if page numbers are unneeded, no visual citation is added. However, an invisible citation will enable the source to appear in the reference list at the end of your prospectus. In this case, check both the Exclude Author box and Exclude Year. No in-text citation will appear but the work will be listed in the reference list. This option is not possible when a page number is needed. If you want the page number to appear alone, simply type it into the text without using EndNote.