

Using EndNote to Manage and Cite Sources

EndNote

EndNote is a bibliographic management tool that lets you organize references and create bibliographies. Use it to:

- Keep track of the citations for articles that you have found
- Upload the records from the databases directly
- Insert bibliographic references into your paper and automatically build lists of works cited
- Format the references and the bibliography in your preferred style

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Getting the EndNote Software

All Carleton students, faculty, and staff are permitted to use EndNote and install it on their home and/or office computers at no charge because the Gould Library has purchased an EndNote software site license for the Carleton College community.

If you do not have EndNote, you can download it for free from the library's EndNote page: www.carleton.edu/campus/library/it/EndNote/ or follow the EndNote link from the library's home page

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EndNote libraries

An EndNote "library" is a database of bibliographic references that you can annotate, search and sort in various ways.


To create a new EndNote Library:

1. Open EndNote
2. Choose "Create a New EndNote Library" and name your library and save it to an appropriate space.

Adding References Manually

References can be added to your library manually, or you can add them directly from catalogs and databases through *filter* and *connection* files (more about those later).

To add a reference manually:

1. Choose References -> New Reference, or click the new reference button .
2. Choose the type of reference and fill in as much of the information as possible.
 - Do not use quotation marks, italics or underlines for the title.
 - If your reference has more than one author or editor, hit **Enter** after each name so that each name is on a separate line.
3. Close the reference window when you are finished. You do not need to save your changes.

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Filters and Connection Files:

Filter and Connection files help EndNote retrieve references from online databases and catalogs. The EndNote download includes a standard set of filter and connection files, however, the librarians at the Gould Library maintain our own set of filter and connection files. Connection and filter files with the suffix “-CC” are files that we have updated. Our updated files are kept on the Collab folder at:

COLLAB\Departments\LIBR\Common\Applications\Windows\PCFilters and PCConnections.

To set up EndNote preferences to point to our updated files:

1. On a Mac, go to EndNote -> Preferences. On a PC, go to Edit -> Preferences.
2. Choose Folder Locations from the list of preferences on the left.
3. Set the Style Folder to:
COLLAB\Departments\LIBR\Common\Applications\Windows\PCStyles.
4. Set the Filter Folder to:
COLLAB\Departments\LIBR\Common\Applications\Windows\PCFilters.
5. Set the Connections Folder to:
COLLAB\Departments\LIBR\Common\Applications\Windows\PCConnections.

Note: Even though the paths refer to Windows and PC, these files work in both Mac and Windows environments.


Adding book references to your library using connection files

Use the connect feature to connect directly to a library catalog. If you know that the Carleton or St. Olaf library has the book, use the “Bridge-CC” connection. If we do not own the book, try connecting to “WorldCat (OCLC)-CC.”

Search for the book by title, author or keywords. While you can use the EndNote connection to try to find relevant books in the catalog, the search interface is not particularly good for those types of searches. It will be easier to use the catalog interfaces to find relevant books, then use the connection tool to bring those books in to your library.

If you cannot find the book in any catalog, then you will need to add the bibliographic information manually.

To search for a book through connections:

1. Choose Tools -> Connect -> Connect ..., or click the connect button .
➤ Choose the connection file you would like to use.
2. Search for the books using the appropriate search terms.

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3. Click search to start the search. You will be shown a window telling you how many references the search retrieved.
4. Click OK to view the found records.
5. Double-click any record to see more information about the book, such as keywords and notes.
6. Highlight any records that you wish to keep and click the "Copy X References To" button.
7. Choose your library from the list. The references will be added to your library.
8. Close the Connection window.


Adding journal article references to your library using filters

Use the filter feature to import records from many different databases. The process varies from database to database, but the general idea is to search the database for relevant records. Mark the records of articles that you want to have in your library and choose an option such as Save or Export. From EndNote, import the records using the appropriate filter.

The library's databases page (<http://webapps.acs.carleton.edu/library/dbs/>) lists the correct filter for EndNote compatible databases. Some databases will let you do a direct import to bibliographic software -- the EndNote import option for those is listed as "Direct Import."

If you cannot find the article in a database that is compatible with EndNote, then you will need to add the bibliographic information manually.

To import articles using filters:

1. Open the database in a browser window and search for relevant articles.
2. Mark the records that you wish to add to your library.
3. Choose the option to save your records.
 - If you have a choice of which fields to save, choose the fields you'd like, or choose "full record."
4. If the database has an option for a direct export to EndNote, choose that (Web of Science and Academic Search Premier both offer this option). You should get a window asking you which library the references should go to. Choose your library.
5. If you cannot import directly to EndNote, save your records to a file on the computer. Note the location of the file.
 - If you were on a Mac using Mozilla, you will need to open the file you saved and save it as an MS DOS Text file.
6. In your EndNote library, choose File -> Import, or click the button with the arrow pointing down .
7. Click "Choose File" and navigate to the document you saved.
8. In the Import Options field, choose "Other Filters", then choose the appropriate filter for the database you searched.

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9. Click import. You will see only the articles that you saved from your database search.
10. Click References -> Show All References to see all of your records in your library.

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Citing References with EndNote

One of the most powerful features of EndNote is its ability to insert citations in to a paper and automatically generate a works cited list based on those citations. It has the flexibility to format references in most styles.

To add citations to you paper

1. Open the word document where you will be inserting your citations
2. Pull up your EndNote library, set the style to your chosen style 
 - The Style determines how your references are formatted.
3. In EndNote, highlight the record you want to cite in your paper.
4. Go back to your word document, place your cursor where the citation should go and click the button with an arrow pointing down into brackets. 
 - Be patient, it may take a while for the citation to format.
5. The citation will appear in the text of your paper and at the end of your paper.

To format the references

6. To change the bibliography section, click the button with 3 numbered lines 
7. If you need to change an in text citation, place your cursor in the citation that needs editing and click the button with a pencil in brackets. 

NOTE: If you want to change the way a reference looks in your paper, change it in EndNote. **Do NOT touch the references cited section of your paper** if you are citing from an EndNote library. That can corrupt your references cited section.

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EndNote Assistance

Talk to any of the reference librarians if you have a question regarding EndNote. EndNote manuals are available for download from www.endnote.com/support/.