

COMPUTER SKILLS MODULE

EndNote™ Managing Electronic References

Office of Medical Education Research and Development
Michigan State University
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Using EndNote™

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Introduction

Why should you think about using an electronic reference manager? Well, let's think about the ways you might use references. You teach a class, you might want the learners to have some references to supplement the class. You have several file drawers of articles that you've accumulated. Some articles may fit into multiple categories or drawers depending on the filing system you use. You might like a database to help organize your reprints. Similarly, if you also have written notes about articles, it would be nice to have them organized in an easily accessible manner. If you are writing a manuscript, you may want to provide appropriate citations, and then have them in the proper format. You might think of other reasons, but these cover the ground for most faculty.

Electronic reference management programs can assist with all these tasks. One of the most common tasks is the creation of a bibliography for a manuscript.

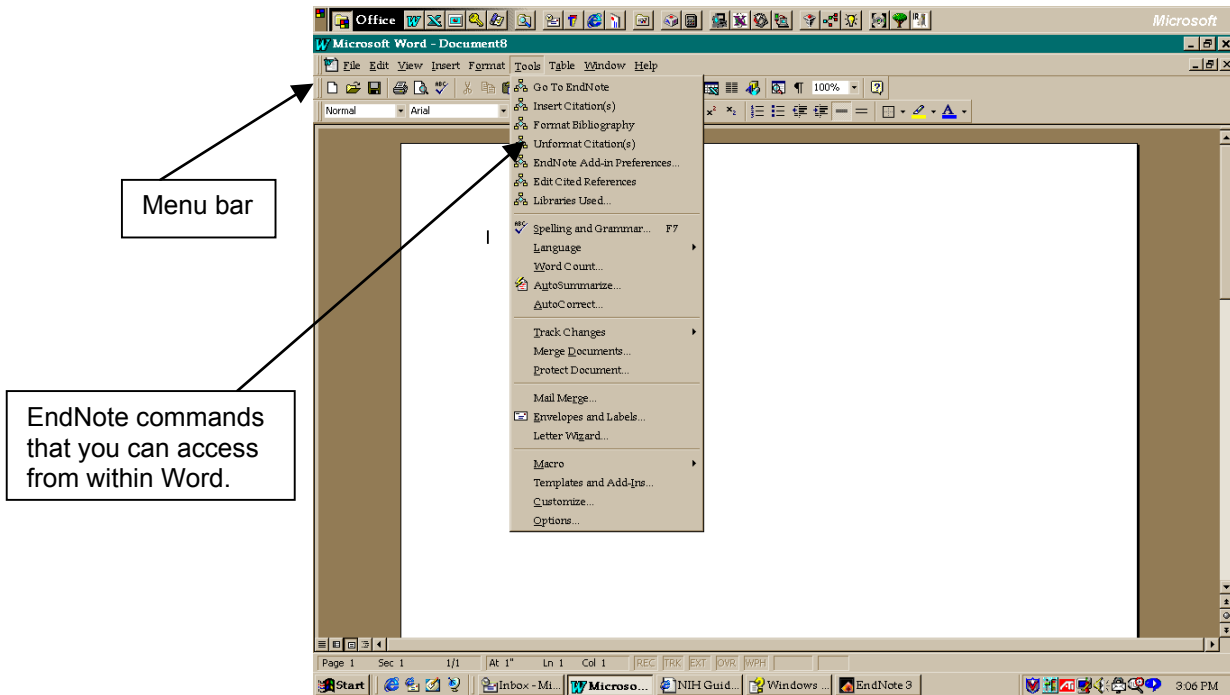
Objectives

In this training session you will learn to use EndNote to:

- 1) Create a bibliography for a manuscript
 - a) Insert citations into a manuscript
 - b) Format the bibliography to a common reference style
- 2) Organize references
 - a) Create a reference
 - b) Search reference library
- 3) Search remote databases and import references

EndNote

EndNote is one of many electronic reference managers. It is available for IBM and Macintosh platforms. It works with most word processing programs, but works especially well with Microsoft Word and Word Perfect. For users of Word and Word Perfect, you can access EndNote as a tool without ever having to “leave” your word processing program.

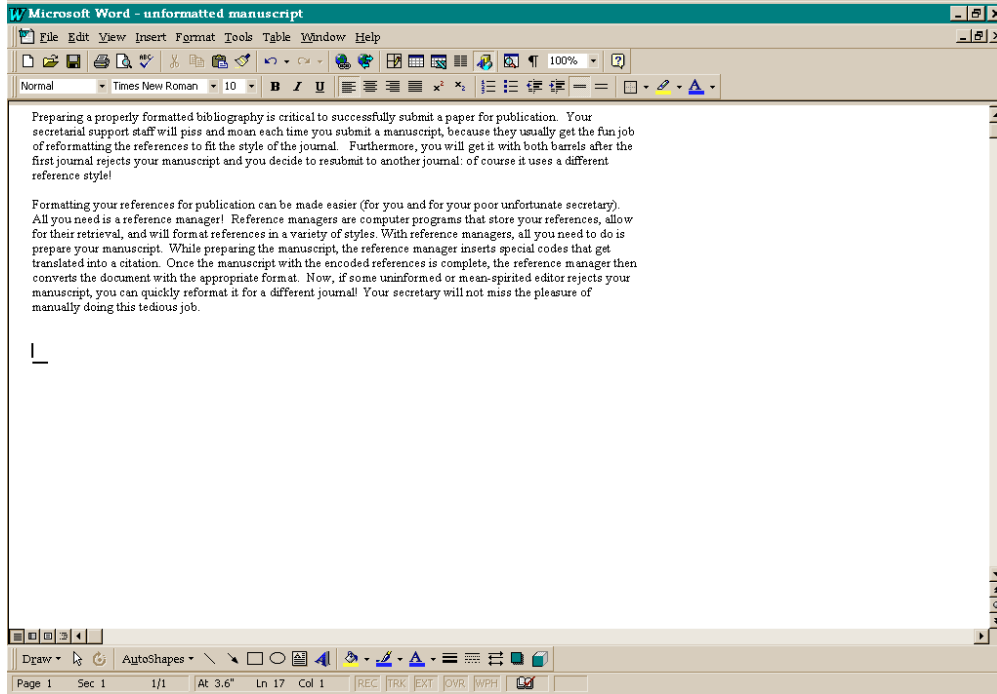


As you can see in the image, all the EndNote tools you need to create a bibliography are accessible directly while you are in Word. EndNote has other features not accessible while you are in Word, but we'll get to those later.

When you install EndNote, you have the option of having it “load” each time you start Word, or have it start when you actually plan to use it. Even if you choose the latter option, you still have access to the EndNote menu bar from within Word.

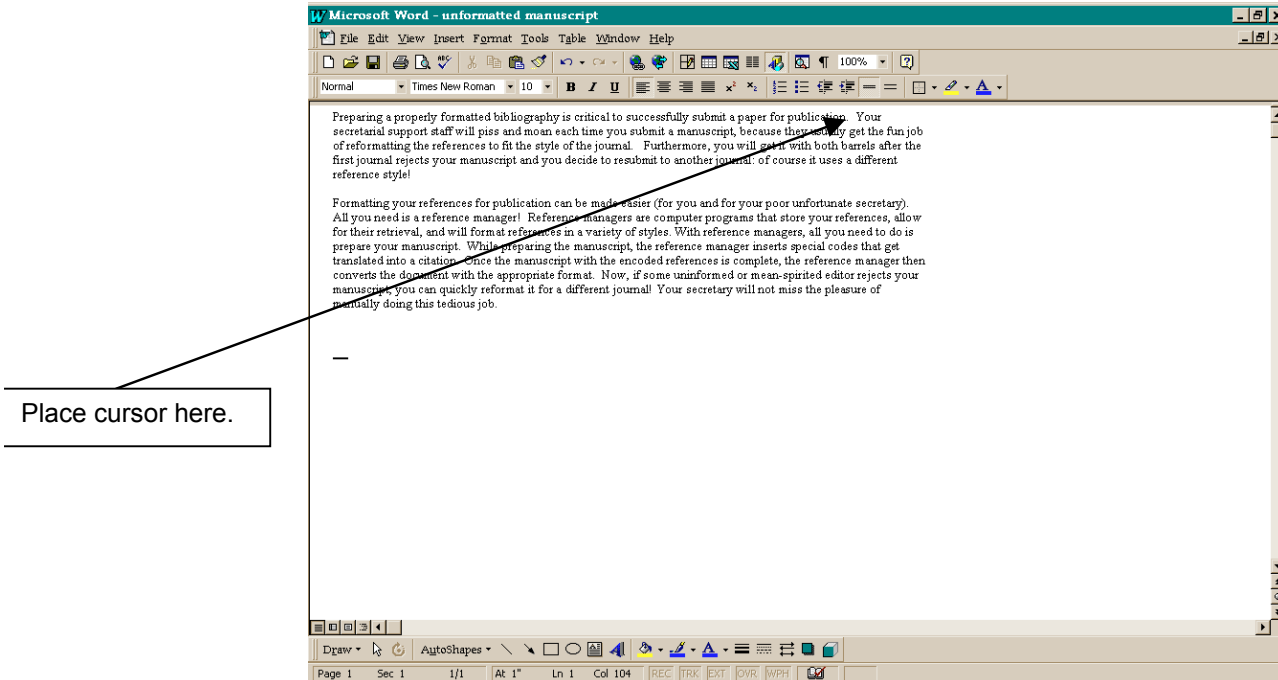
Creating a bibliography

We are going to build a bibliography for a manuscript. Start Microsoft Word. We have provided you with a sample manuscript, called “unformatted manuscript”. Open it. You will notice that it has no references and some of the statements need appropriate attribution.



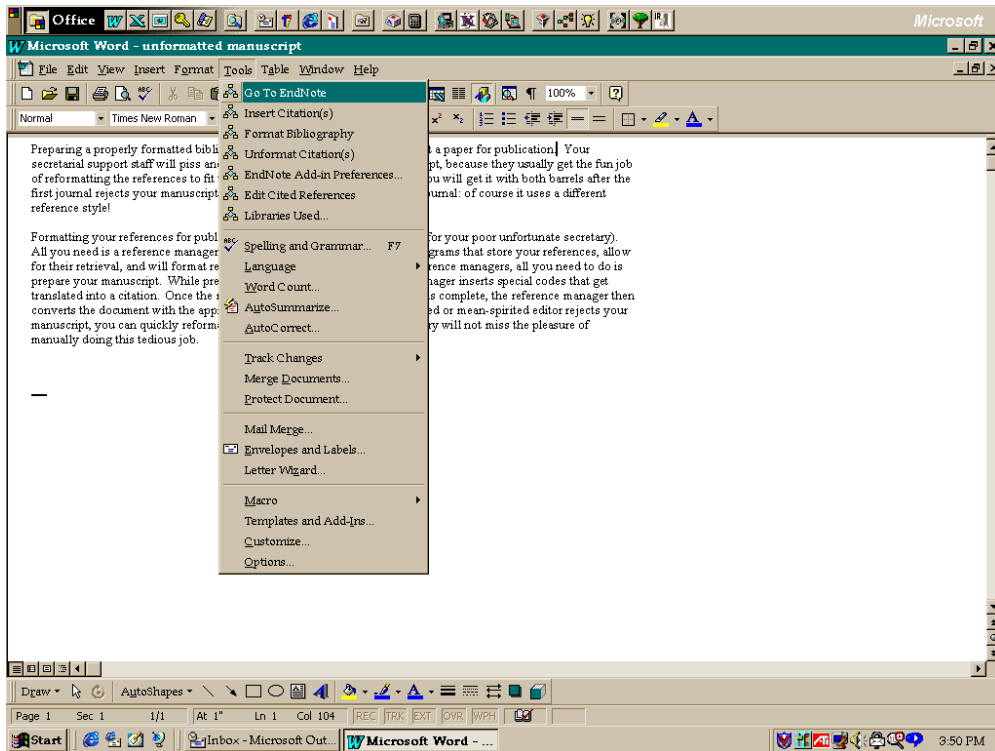
Inserting a single citation

To insert a reference into the manuscript, position the cursor to the place you want to place the citation. Place the cursor immediately after the period ending the first sentence.

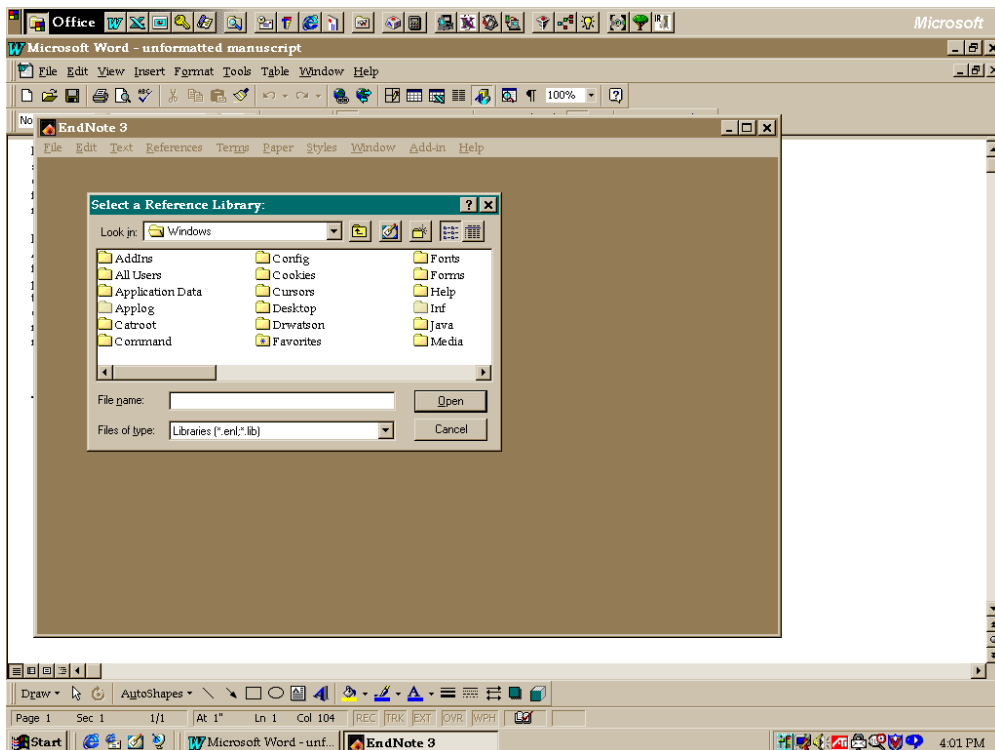


Using EndNote™

To access the EndNote library, click on “Tools” then “Go to EndNote” in the Word menu bar.

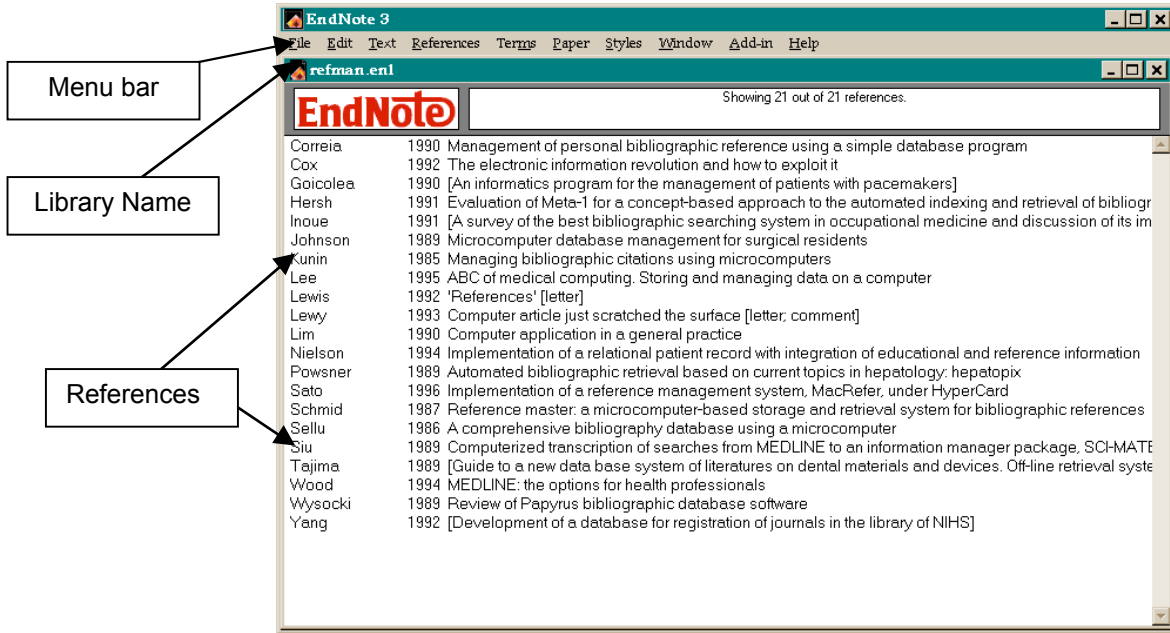


When you start EndNote, you will be prompted to identify a library. This is a database of references that you create (more about this later). Libraries can be organized into narrow manuscript-specific topics or into broader categories. We have provided you with a sample library for use in this exercise.

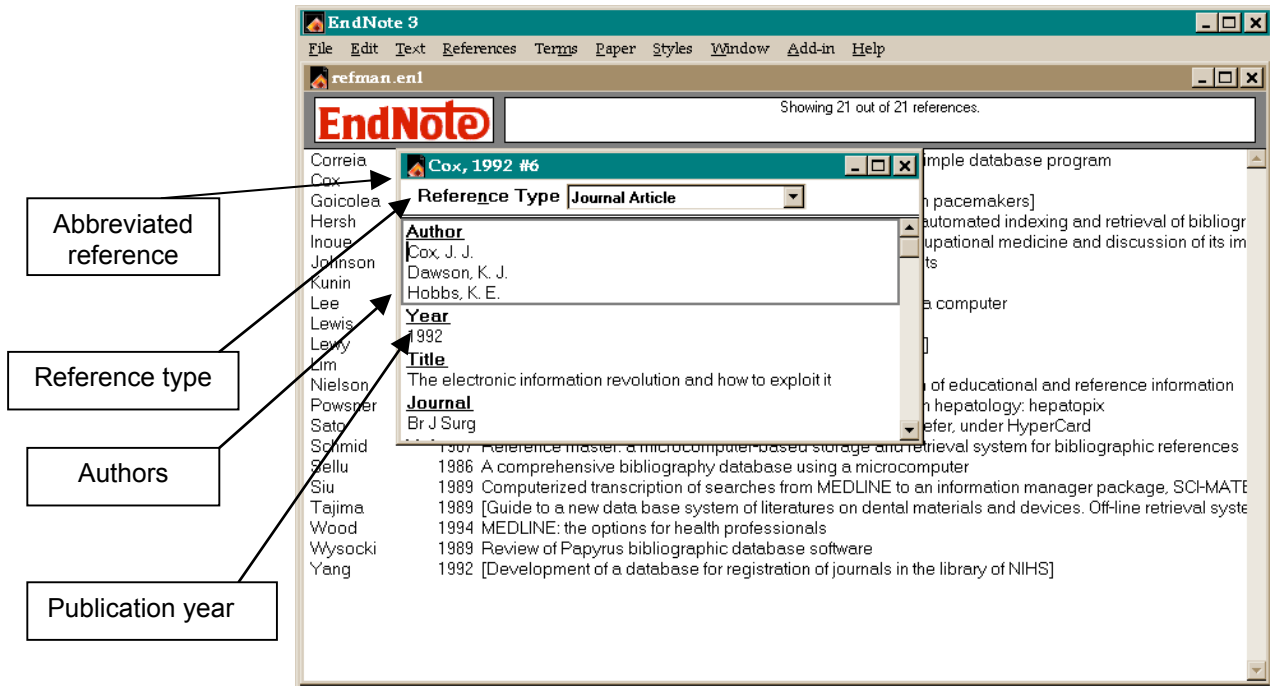


Using EndNote™

Open the library called “refman”. You will see a list of 21 references organized in alphabetical order. Like other windows programs, you also should see the familiar menu bar at the top.



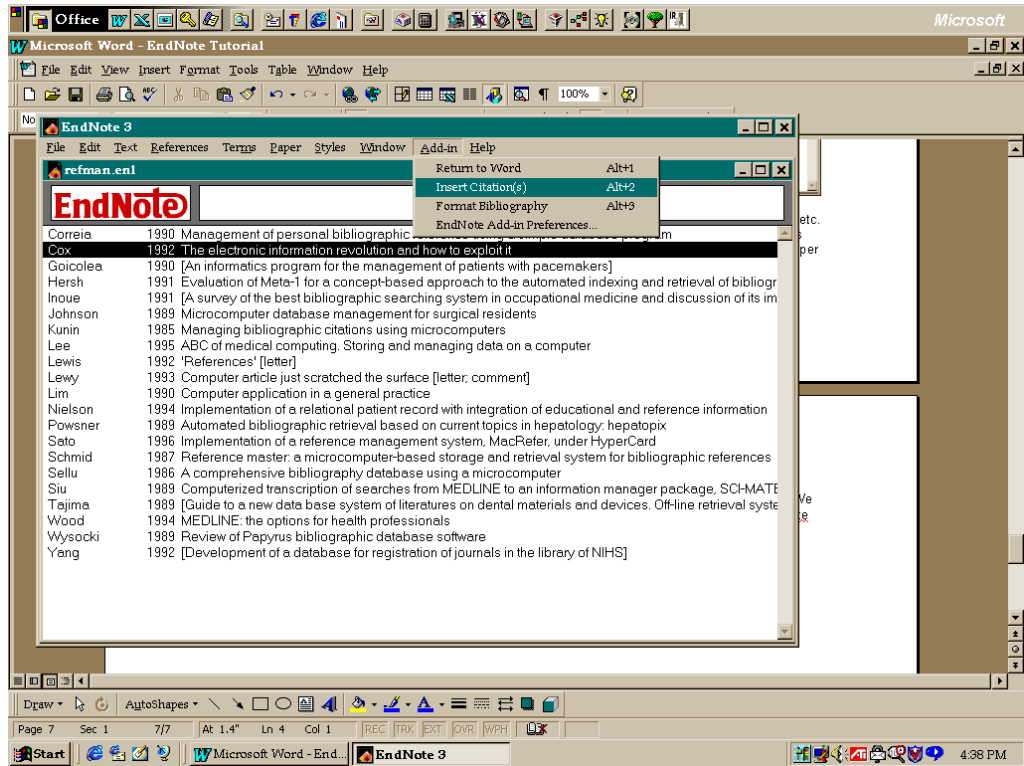
The first sentence in the manuscript comes from the reference by Cox. Click once on Cox and the reference line is highlighted. If you click twice, EndNote opens another dialog box that gives you more detail about the reference. Go ahead and double click.



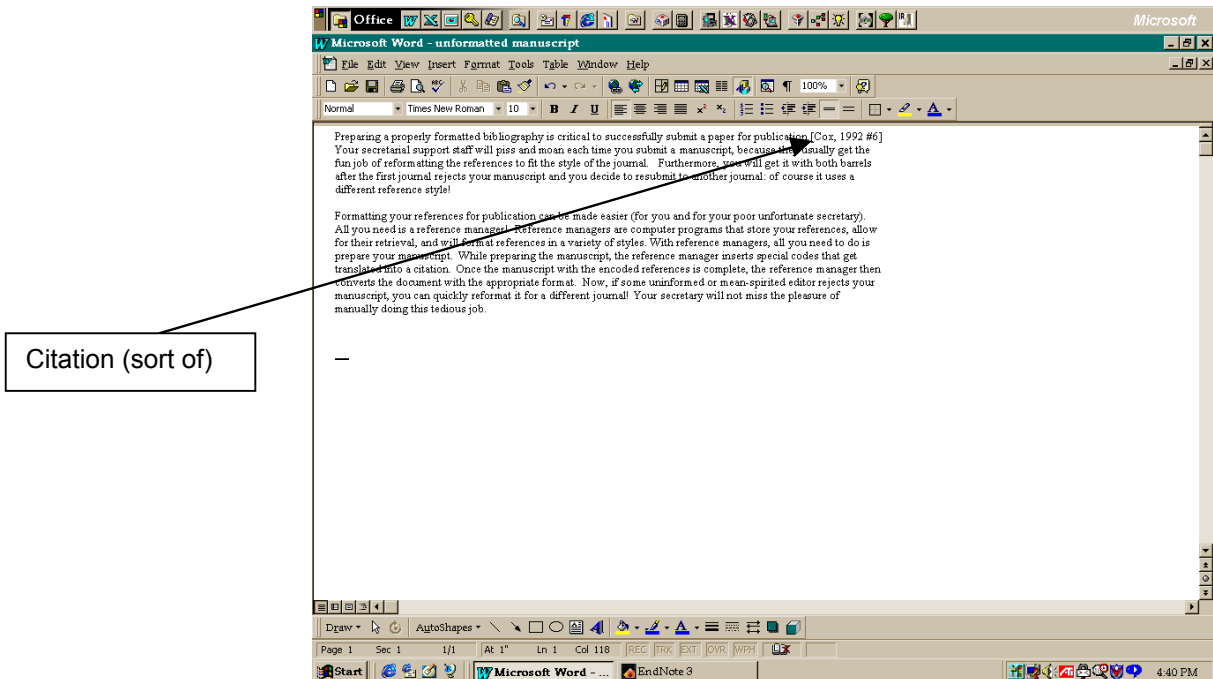
Each reference has several elements called “fields”: author, year of publication, title, journal, abstract, etc. You can go from one field to another either by clicking on the field or by hitting the tab key. This allows you to edit references or to make annotations. Close the reference box by clicking on the “X” in the upper right hand corner.

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Remember that in the unformatted manuscript, the cursor should be at the end of the first sentence. We are now going to insert the Cox reference at that location. To insert the citation from within the EndNote window, click on the menu called “Add-in”. Click on the item called “Insert Citation(s)”.



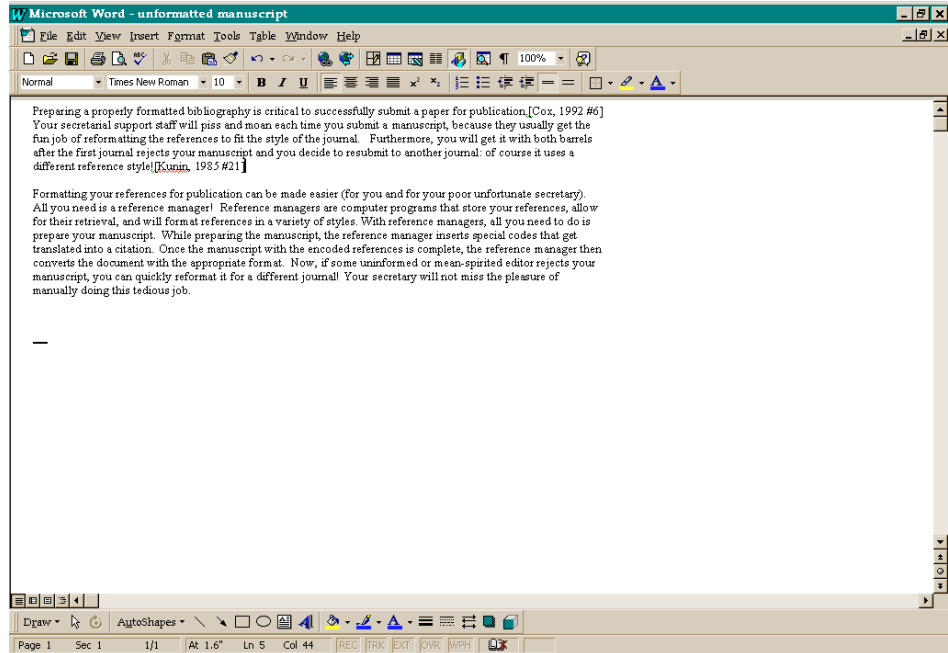
What happened? EndNote should have “jumped” to the manuscript and where the cursor used to be is now, magically something that looks kind of like a reference, but isn’t!



Using EndNote™

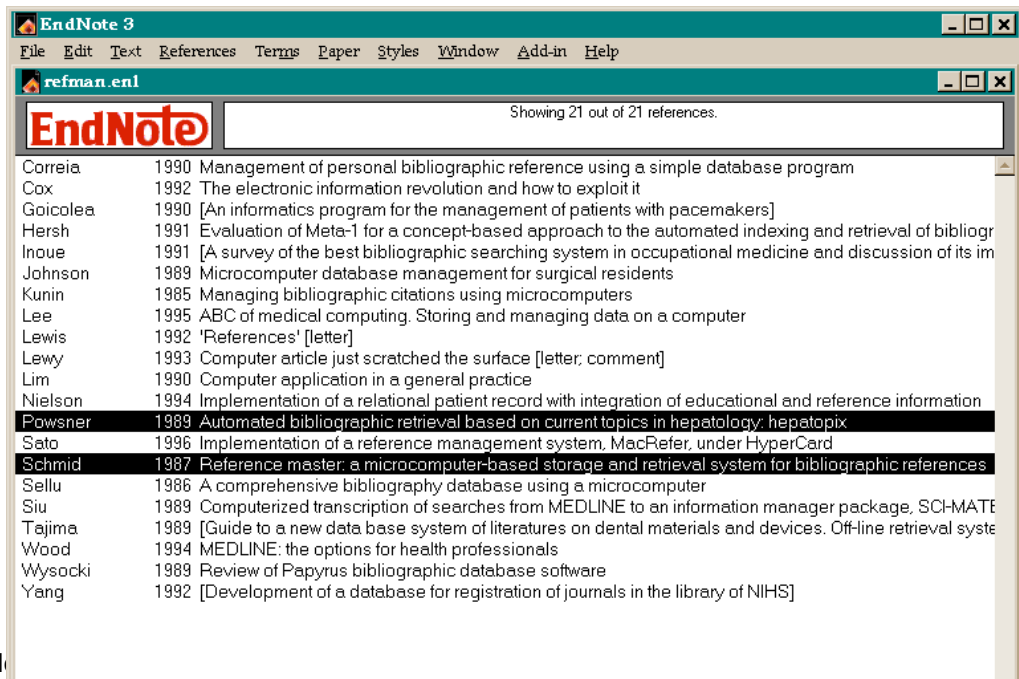
EndNote just inserted a code. It will use this code to make your final bibliography a bit later.

Now, at the end of the paragraph is another statement that needs a citation, this one by Kunin. As you did above, insert the Kunin reference. When you are done, the first paragraph of your manuscript should have 2 citations and look like this:



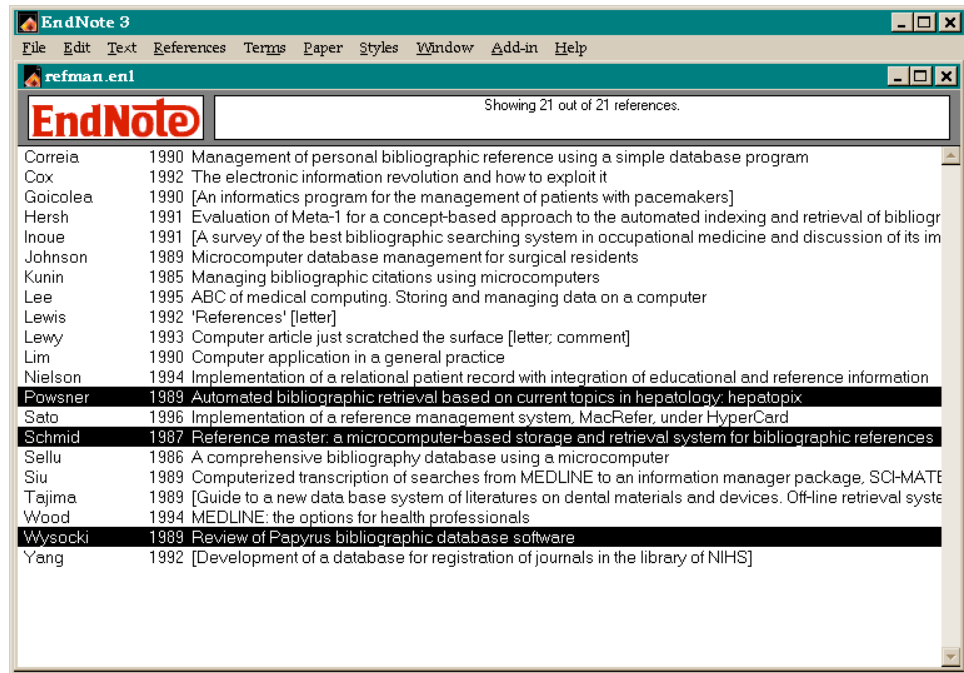
Inserting multiple citations

You can also place several citations in one place. Notice the third sentence in the second paragraph. This statement has been a synthesis of several authors: Powsner, Schmid, Wysocki. Place your cursor at the end of the third sentence. Now, switch back to EndNote. Click once on the first reference. Now depress the “CTRL” key and click on the second reference. You should notice that now both references are highlighted.

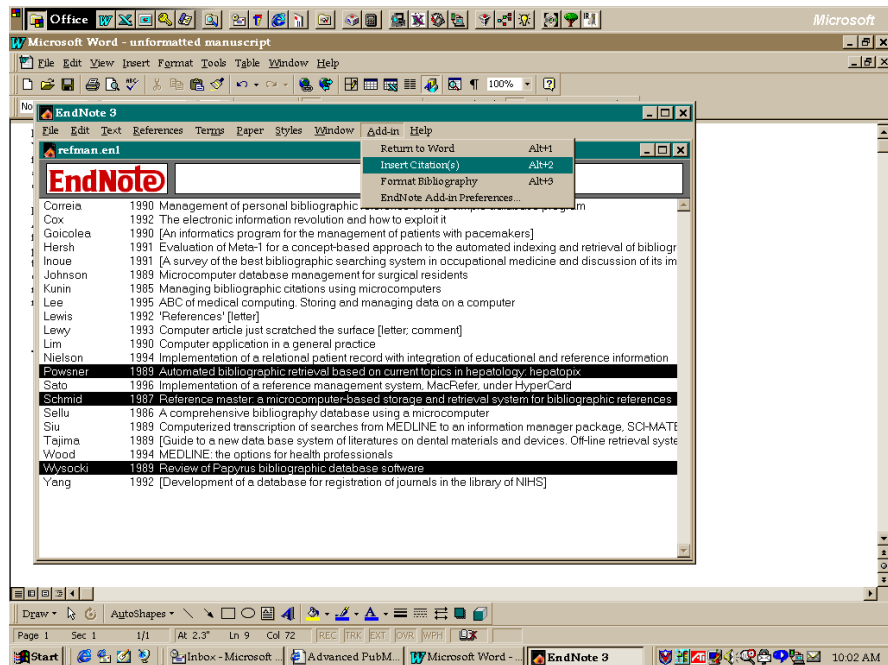


Using EndNote™

Keep the “CTRL” key pressed and click on the last reference. Now, all three references should be highlighted.

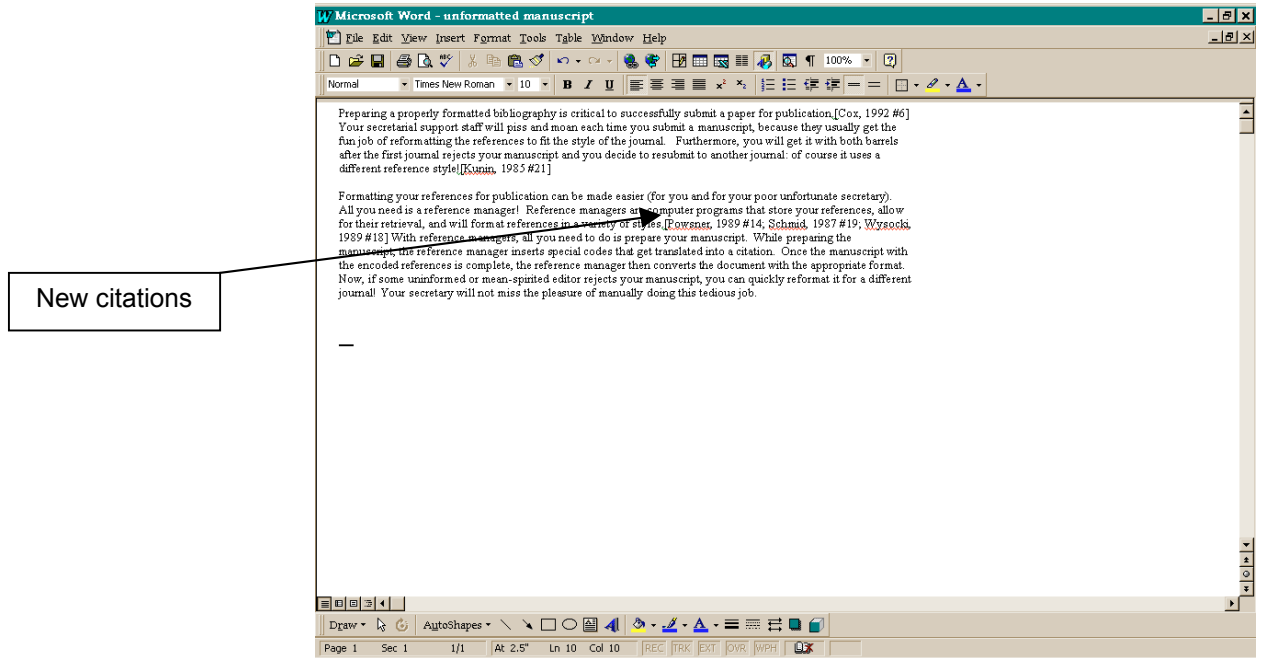


Just as you did for a single reference, click “Add-in” on the menu bar and press “Insert Citation(s).”



Using EndNote™

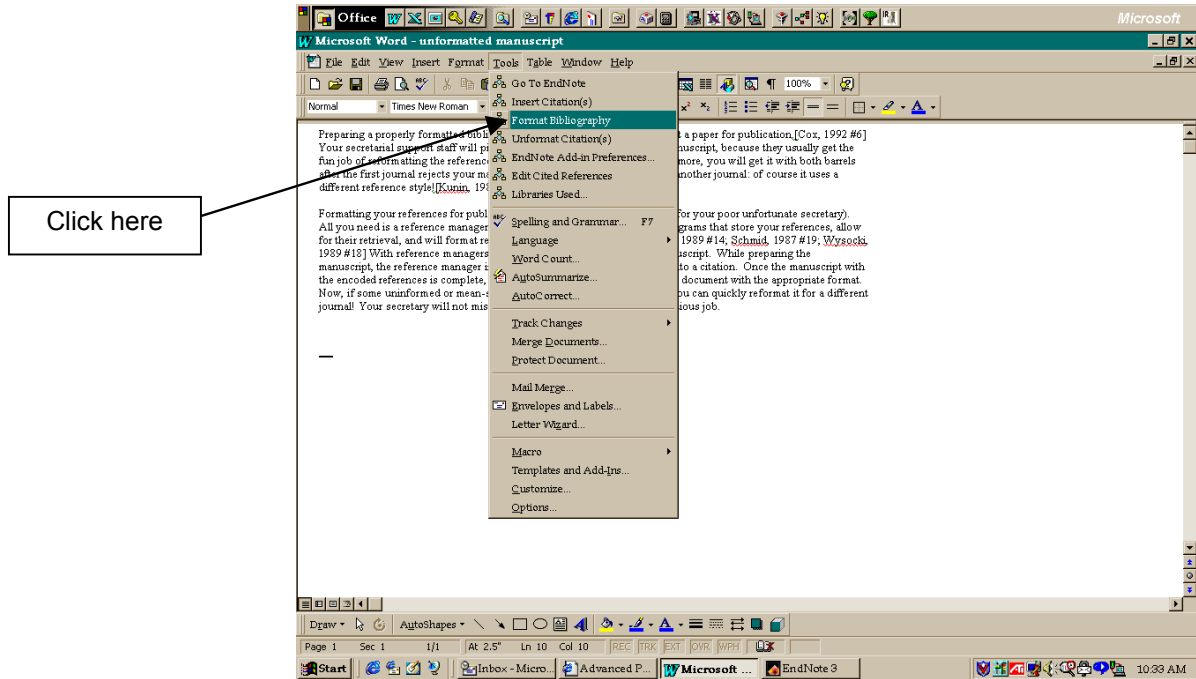
And once again, EndNote should “jump” back to the manuscript and you should see the citations inserted at the end of the third sentence.



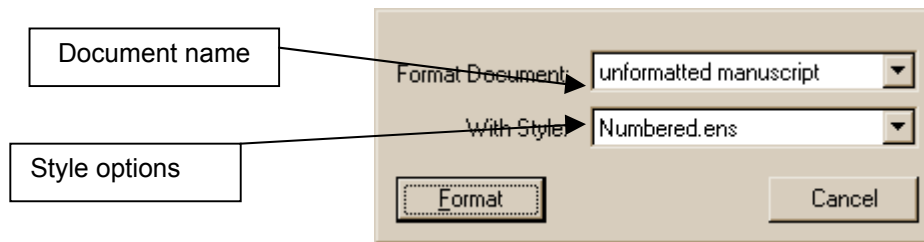
At this point, if you have other citations to include, you could proceed until finished. This manuscript has no additional citations, so, now we are ready to format the document and its bibliography.

Formatting the references

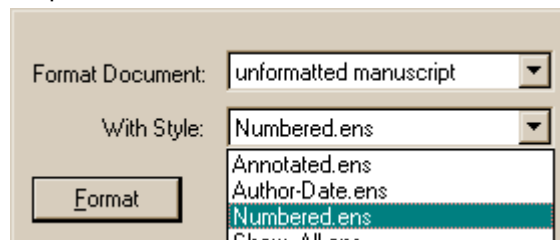
This is where the real magic happens! You also have two ways you can create the magic: from within Word or from within EndNote. Let's do it from within Word since that's probably where you will spend most of your writing time. Click on the "Tools" item on the menu bar and click on the item "Format Bibliography".



A dialog box should pop up.

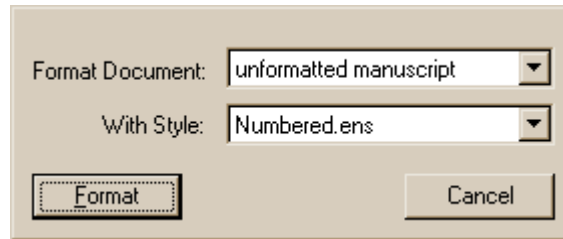


If you press on the "With style" arrow, you get a drop down menu.

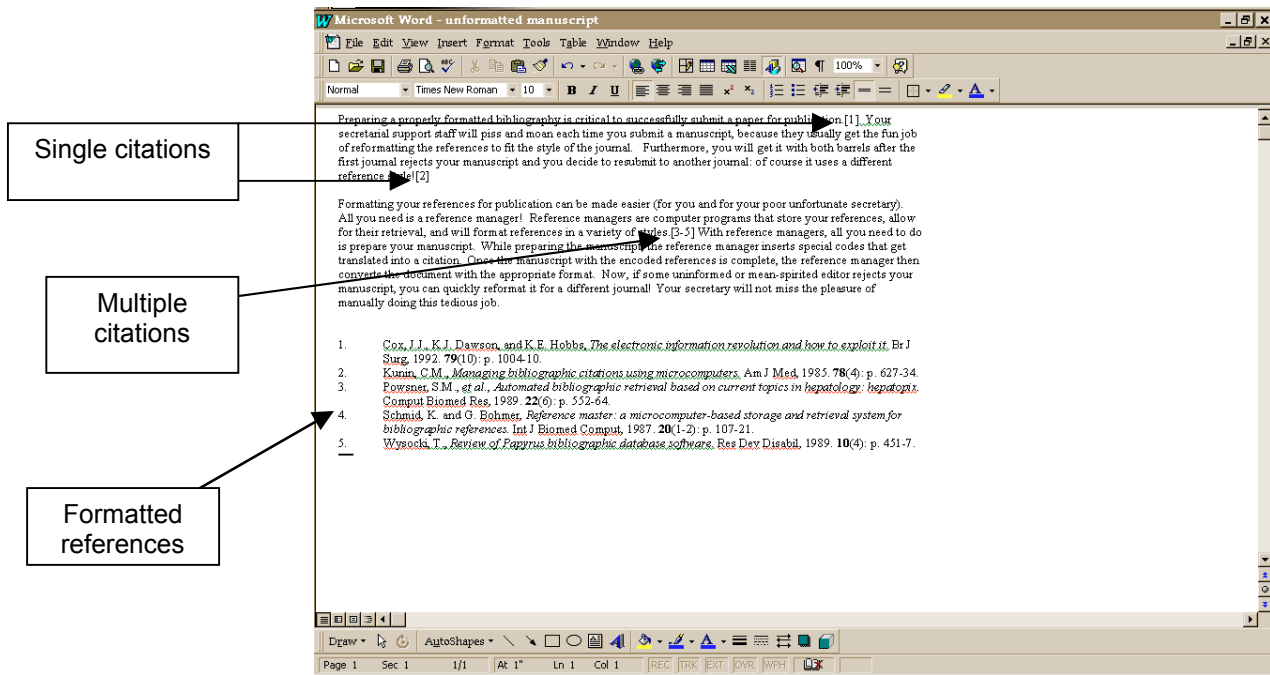


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EndNote has **many** other styles to pick from, but for this exercise, we'll use the style called "Numbered."



Now click on the button labeled "Format" and watch the magic happen! A whole bunch of things happened before your very eyes. A number of screens popped up and disappeared. When the smoke settles, you should have magically before you a formatted manuscript and bibliography!



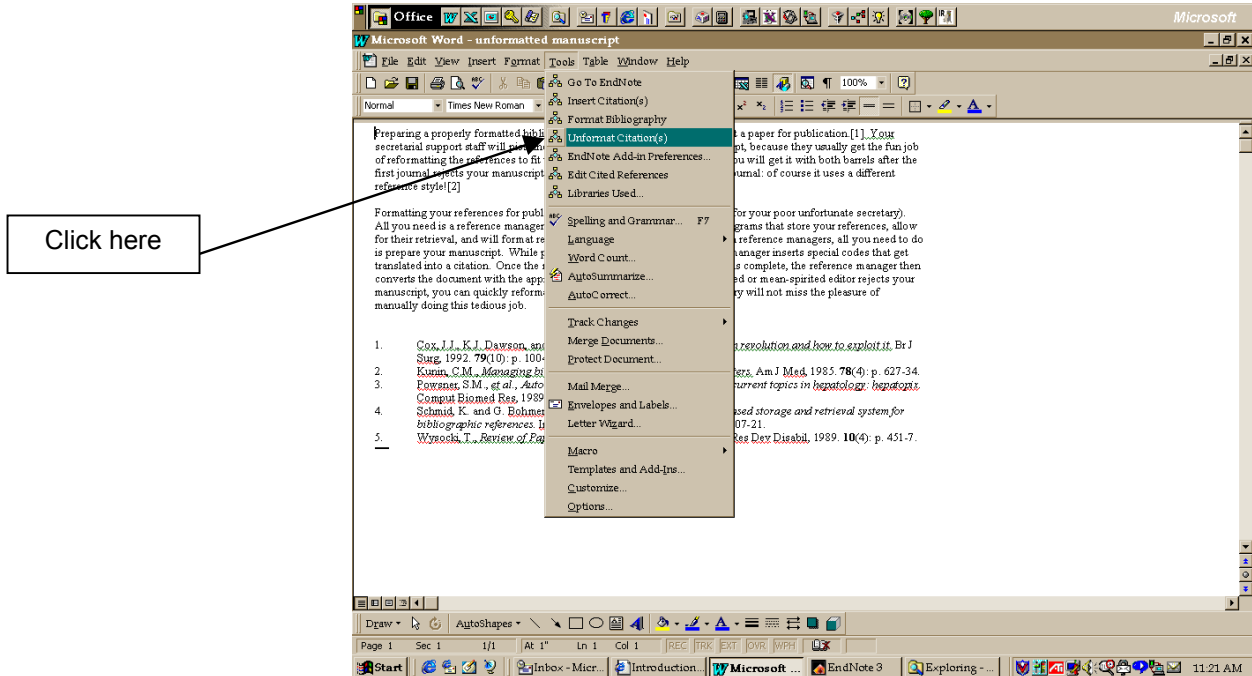
Now all you have to do is submit it for publication. A few weeks pass. What do you mean my manuscript wasn't suitable for publication in the prestigious Journal of Arcane and Useless Research! Oh well, time to try a different journal, the Journal of Obscure Facts and Figures. You check the instructions to authors and, of course, they use a different reference format! In the old days, you would either redo the references yourself or have your long suffering graduate student or secretary do it. With EndNote, you can do it in less than 2 minutes!

Reformatting the bibliography

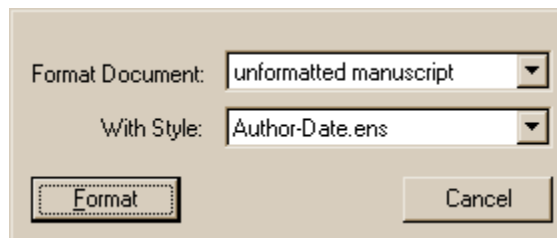
To reformat a manuscript you need three things:

1. The manuscript with its formatted bibliography
2. The reference library you used in preparing the manuscript must be open
3. You need to know the new reference style

The Journal of Obscure Facts and Figures prefers that citations use the author and year of publication, rather than numbers. To get the manuscript into this format, we must first unformat the old manuscript. Once again, let's work from within Word. Click on "Tools". Then "Unformat bibliography".

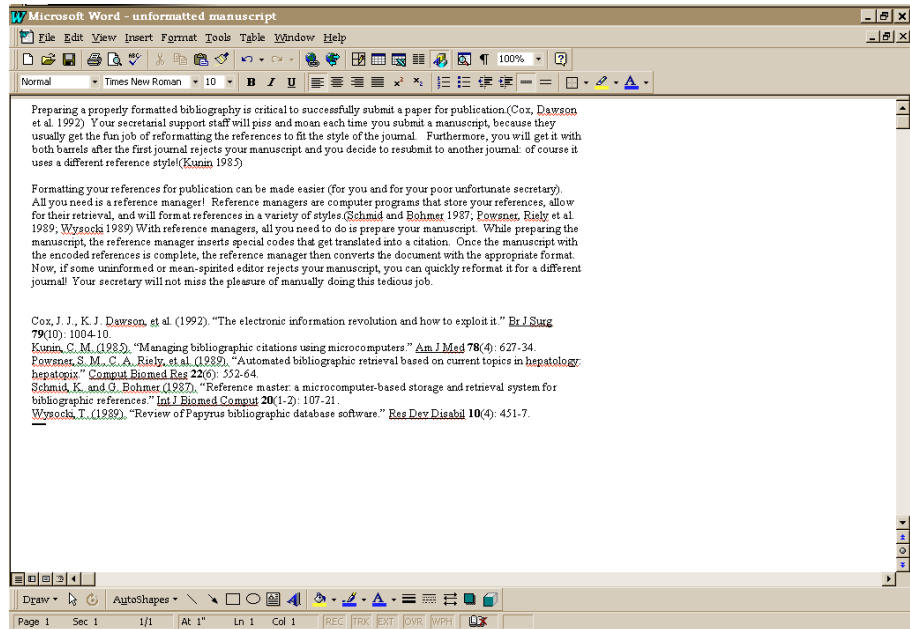


Once again, magic happens and you are back to the original format with the funny looking code embedded within the text. As we have done before, you can re-format the manuscript by clicking on "Tools" then "Format bibliography." This time, choose the "Author-Date" format.



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Press the “Format” button and watch the fun stuff again! You should now have a new manuscript (not really new, it just looks that way-kinda like a paint job on your old clunker!) ready for submission in the proper format!



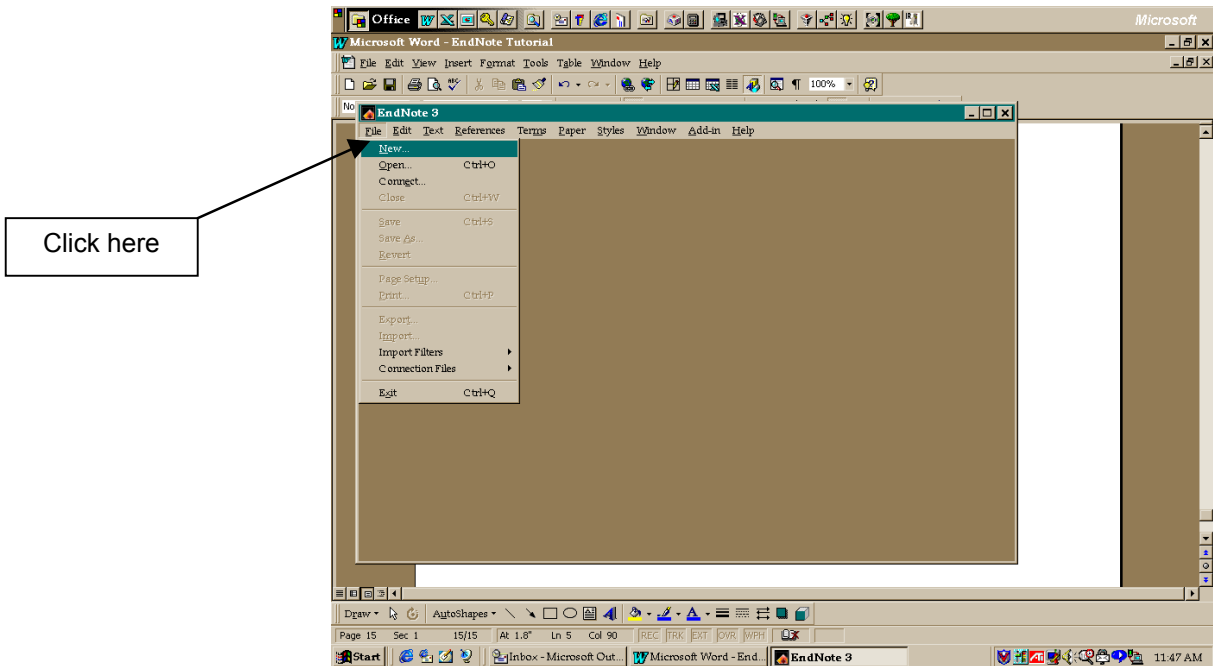
Congratulations! You have just completed the first section of this module.

Creating libraries

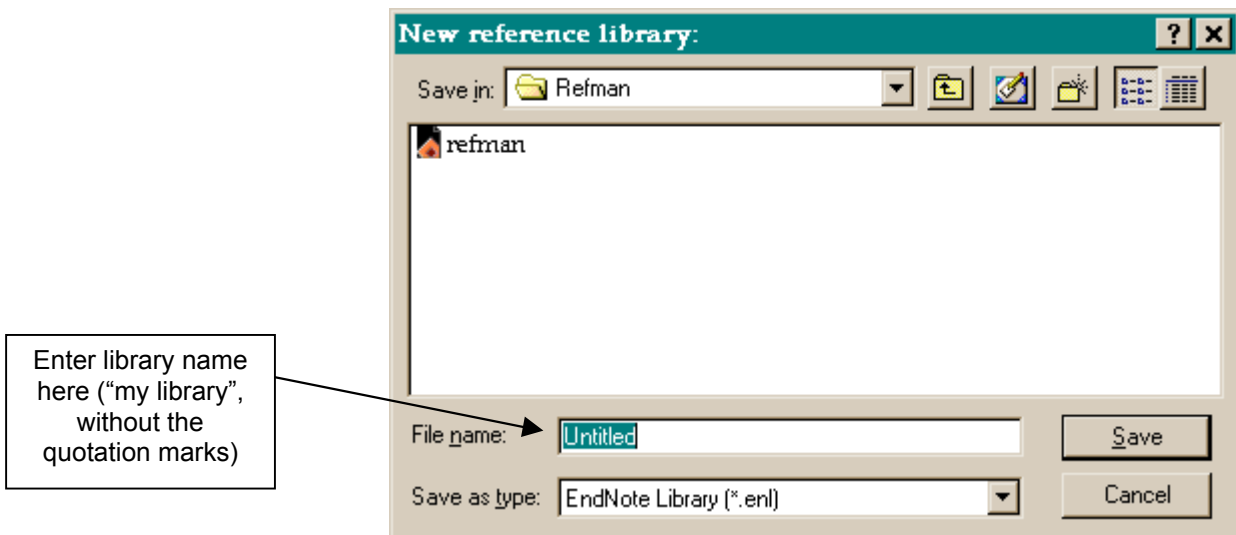
In the first module, we provided you with a library. You won't always have this luxury and will have to create your own.

Create a library

Go to EndNote and close the refman library. In the menu bar, click on "File" then "New".

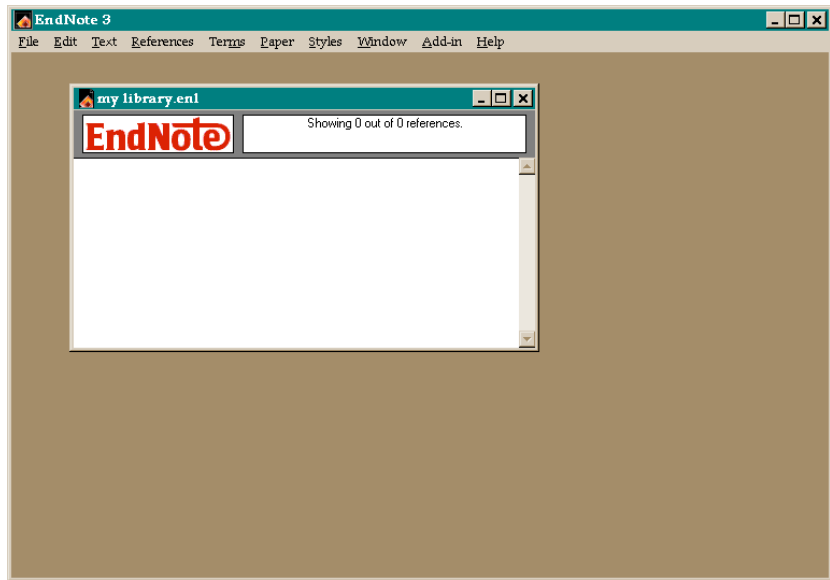


A dialog box will open prompting you to name the new library. Give it a name, "my library" and enter it into the box.



Using EndNote™

After you hit the “Enter” button, EndNote will take you to a blank library.



Add references

To create a new reference within EndNote, you will need to know the data to enter into the fields. It may be helpful to have a hard copy of the article, book chapter, etc. For this step, you will use the following abstract citation from PubMed:

PubMed medline query - Microsoft Internet Explorer

File Edit View Go Favorites Help

Back Forward Stop Refresh Home Search Favorites History Channels Fullscreen Mail Print Edit

Address <http://www.ncbi.nlm.nih.gov/htbin-post/Entrez/query?uid=9701943&form=6&db=m&Dopt=b> Links

NCBI PubMed PubMed QUERY PubMed ?

Other Formats: Citation MEDLINE

Links: Related Articles

Order this document

J Med Entomol 1998 Jul;35(4):551-5

A new ecology for scrub typhus associated with a focus of antibiotic resistance in rice farmers in Thailand.

Tanskul P, Linthicum KJ, Watcharapichat P, Phulsuksombati D, Mungviriyi S, Ratanatham S, Suwanabun N, Sattabongkot J, Watt G

Department of Entomology, U.S. Army Medical Component, Armed Forces Research Institute of Medical Sciences, Phya Thai, Bangkok, Thailand.

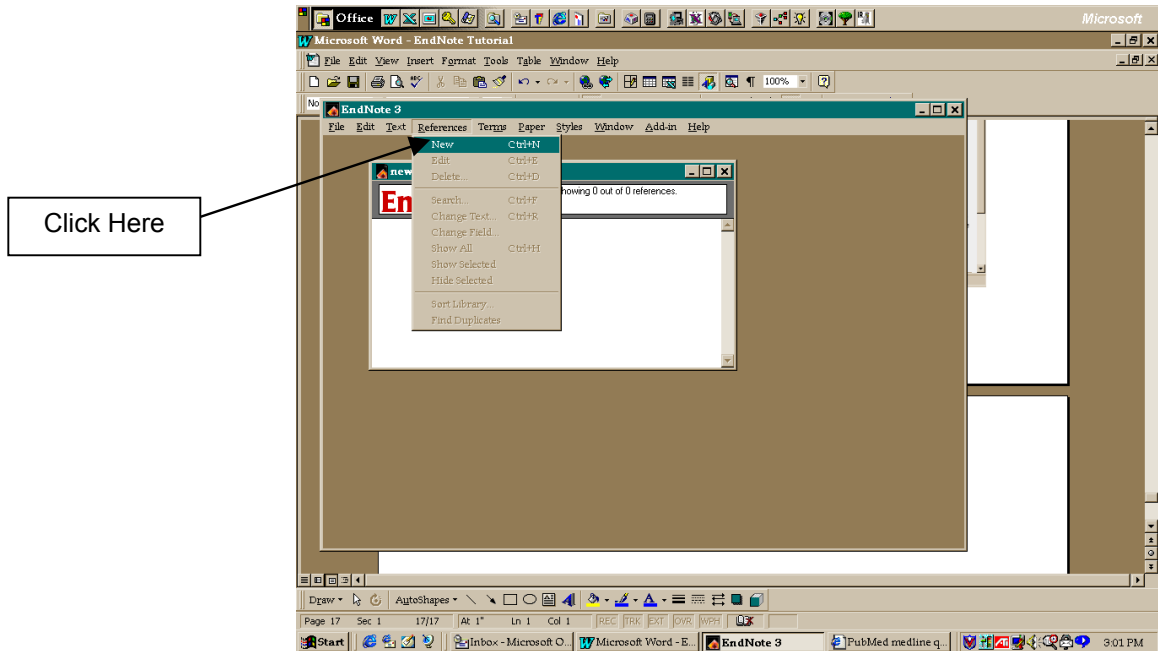
Following the documentation of chloramphenicol-resistant and doxycycline-resistant strains of *Orientia tsutsugamushi* (Hyashi) in northern Thailand, we conducted ecological and epidemiological studies near the houses of patients hospitalized with antibiotic-resistant infections. New associations between chiggers, rodents, and *O. tsutsugamushi* in active rice agriculture areas, an ecological habitat not described previously, are reported. *Rattus rattus* (L.) was the most common species (representing 85.8% of the 1,433 rodents processed), followed by *Rattus losea* (Swinhoe) (9.4%), *Bandicota indica* (Bechstein) (3.6%), and *Rattus argentiventer* (Robinson and Kloss) (1.3%). *O. tsutsugamushi* was isolated from 30% of the *R. rattus* and *R. losea*, 29% of the *B. indica*, and 33% of the *R. argentiventer* collected. Mean minimum infection rates were 0.03 in *Leptotrombidium chiangraiensis* Tanskul & Linthicum, a new species of chigger, and 0.002 in *Leptotrombidium imphalum* (Vercammen-Grandjean & Langston), a chigger species not previously associated with scrub typhus transmission. Efficient vertical and horizontal transmission of *O. tsutsugamushi* by *L. chiangraiensis* and *L. imphalum* was demonstrated. During a 19-mo period from October 1993 to April 1995, the overall prevalence of human IgM and IgG antibody to *O. tsutsugamushi* was 25.5 and 47.3%, respectively. *L. chiangraiensis* and *L. imphalum* are incriminated as vectors of *O. tsutsugamushi* in a rice field habitat associated with a focus of antibiotic resistance.

PMID: 9701943, UI: 98367265

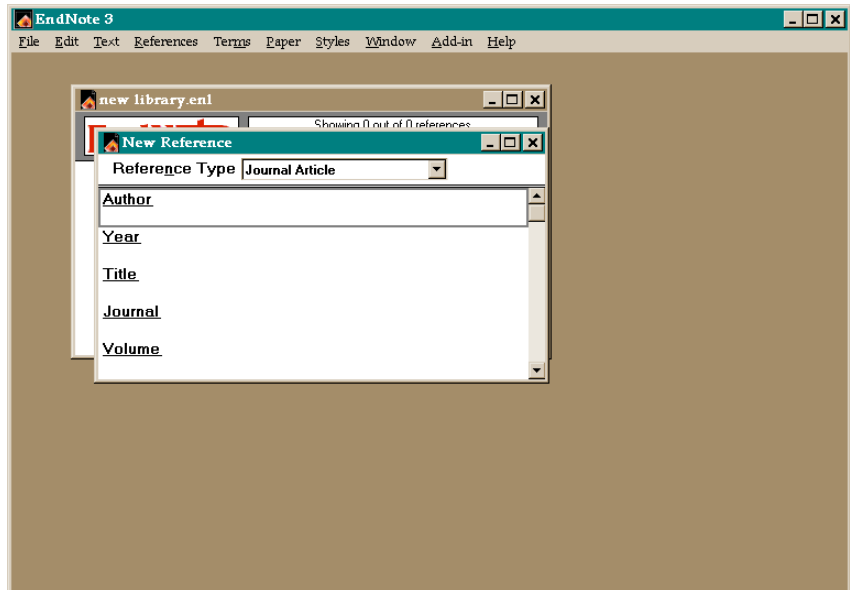
Done Internet zone

Using EndNote™

To enter a new reference, go to the menu bar and click on “References” then “New”.

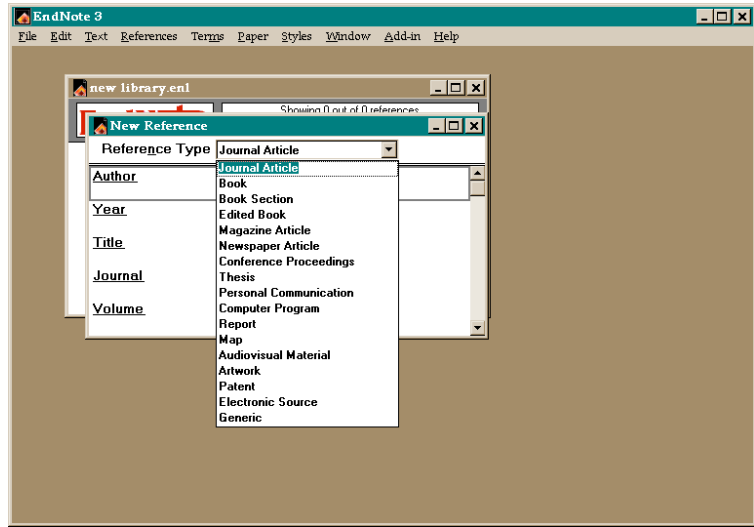


EndNote should take you to another screen. This one is empty except for a template with information fields. If you are used to working with database programs, this will probably look familiar to you.



Using EndNote™

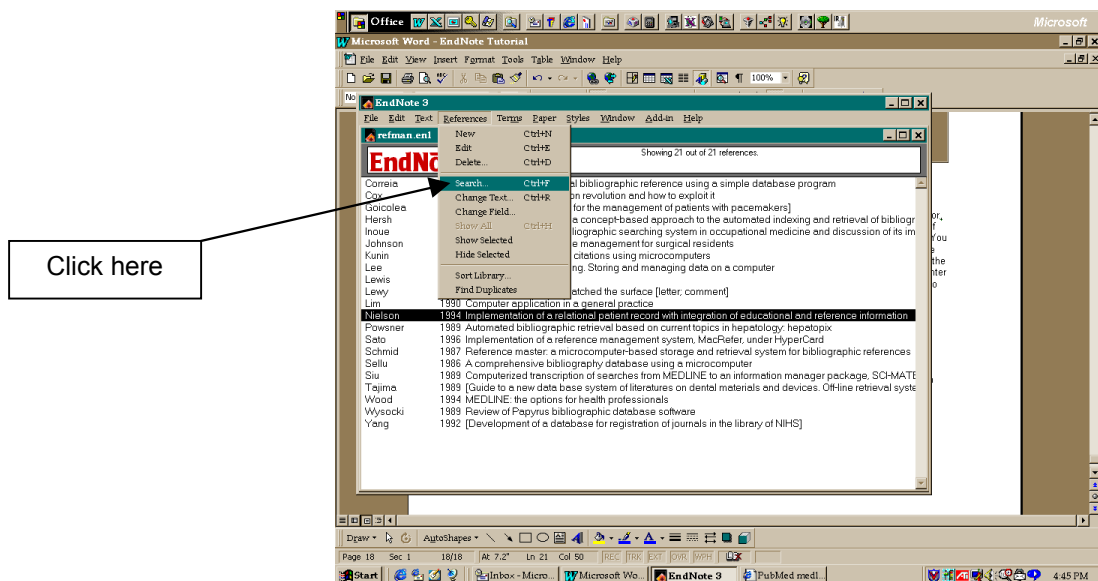
You can enter many types of references. If you click on the drop down menu box, you can see most of the more commonly reference types that EndNote handles.



Since we are working with an article, we will stick with the first choice, “Journal Article”. The cursor automatically goes to the first field, “Author”. Keep in mind that when you type in the name of the author, convention has you give the last name first, then the initials. So in the “Author” field, type Tanskul P. If you hit the “Enter” key, a new author line appears so you can enter the second author, Linthicum KJ. You can proceed until you have entered all the authors. After you have entered all the authors, move to the next field, “Year”. You can move to the next field either by moving the cursor and clicking or by hitting the “Tab” key on the computer’s keyboard. Here type “1998”. After finishing that field, you can similarly enter data into successive fields until you have finished the citation. Some fields are more time-consuming to complete than others are (like the abstract). Surely there must be a better way. Stay tuned!

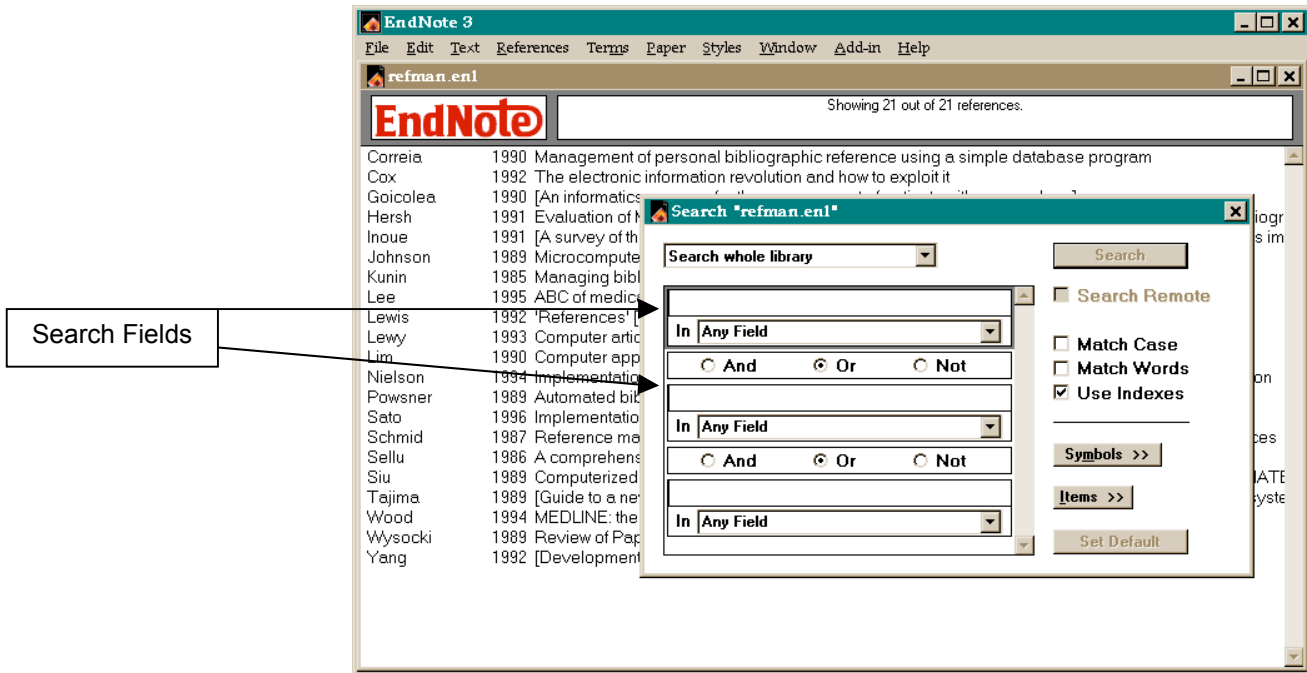
Search reference library

Once you have a library of references, you may from time to time wish to search within that library. EndNote has a search engine that facilitates this. Let’s close the “my library” and open the “refman” library you worked with earlier. Suppose you want to see if your library has any information about using references in the care of patients. Go to the EndNote menu bar and click on “References” then “Search”.



Using EndNote™

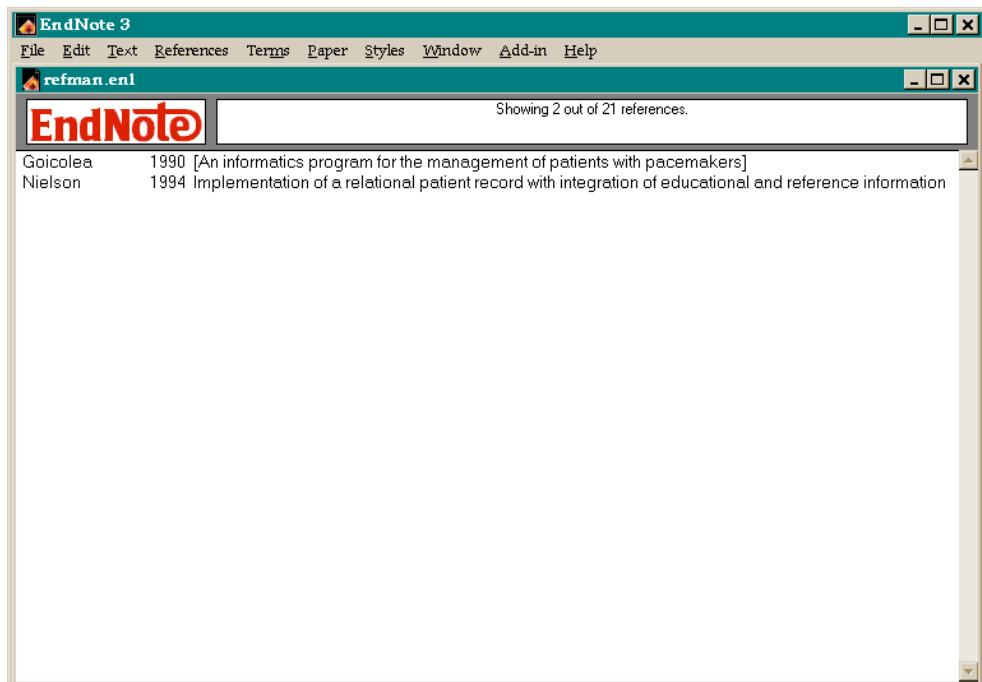
EndNote should take you to another box that looks like this:



You will notice that, like in PubMed, you can do Boolean searches and can designate whether you want to search the entire record or just certain fields.

OK, to answer our question (remember, you want to see if your library has any information about using references in the care of patients), we can pick several possible keywords. Write some of them down (don't look ahead).

OK, you probably came up with one or two words. Since the library is all about references, you might just search on the word patient and see what you get. If this were a very large library, you might have to use other words to narrow the results. In the search box, type the word "patient". EndNote will search the library and show what it finds.



Searching remote databases

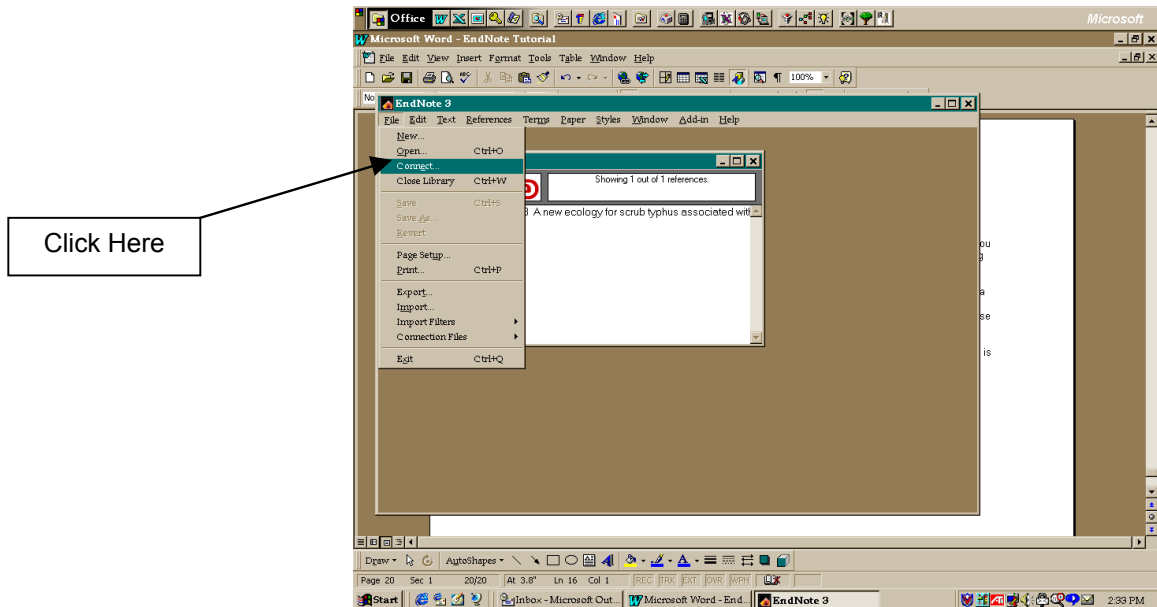
EndNote has one more neat feature. It can connect to remote databases, such as PubMed, to allow you to search them and retrieve references for later use. You can retrieve these references into an existing library or into a new one.

For EndNote to connect, **you** must be connected to the Internet, either through via modem or through a “hard connection”. If you are using EndNote on a computer in one of the MSU computer laboratories, you are “hardwired” and don’t need to do anything else. If you are at home or someplace where you use a modem, connect to the Internet now.

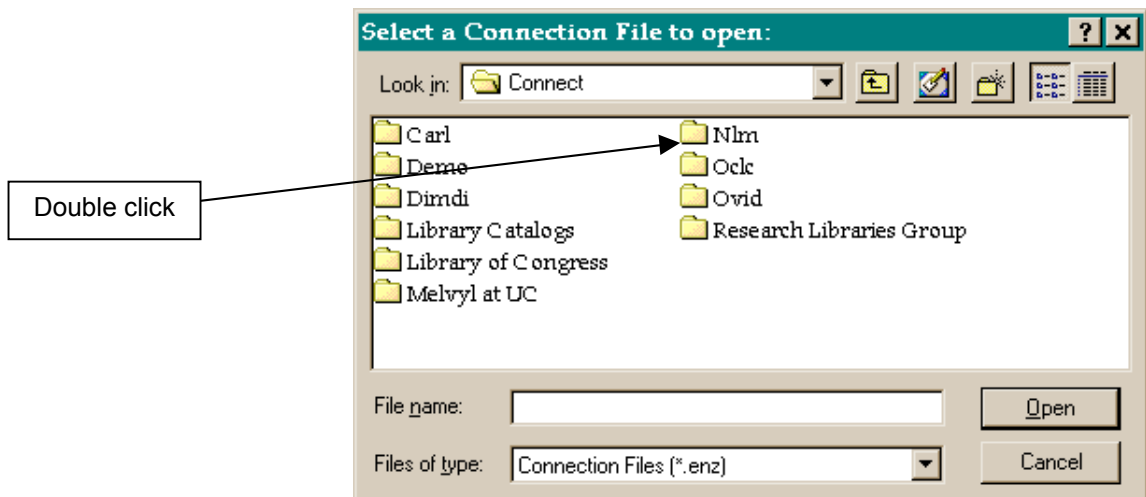
In EndNote, re-open the “my library” you created earlier (it should have one citation). Since this library is about my favorite disease, tsutsugamushi fever, we will want to do a search on this. We will search MEDLINE looking for references on treating tsutsugamushi fever.

Connect to the remote database

Click on “File|Connect”.

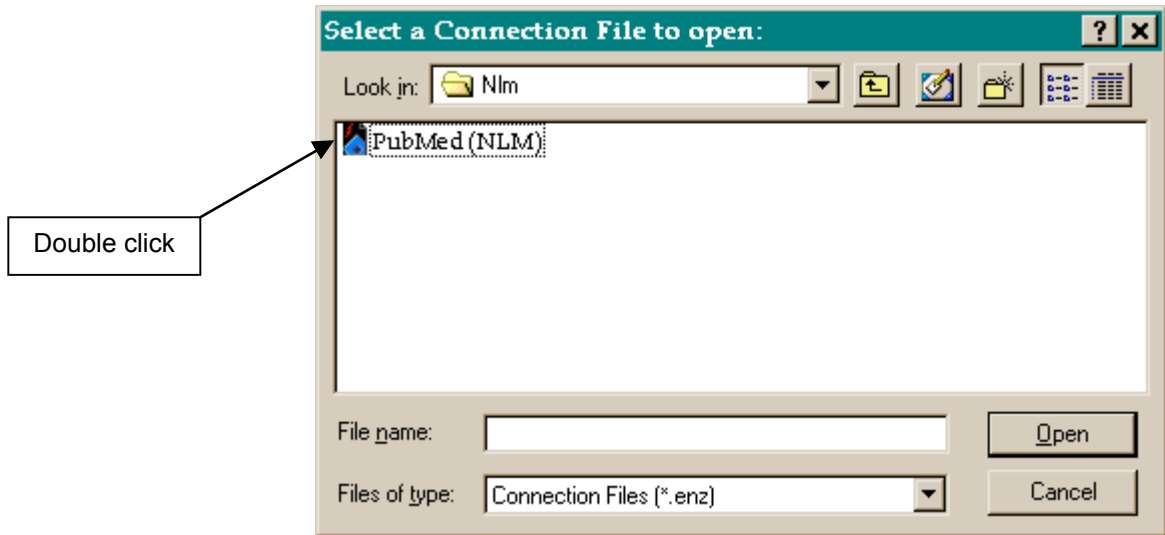


A new window containing a bunch of file folders should appear. Double click on the one called “Nlm”

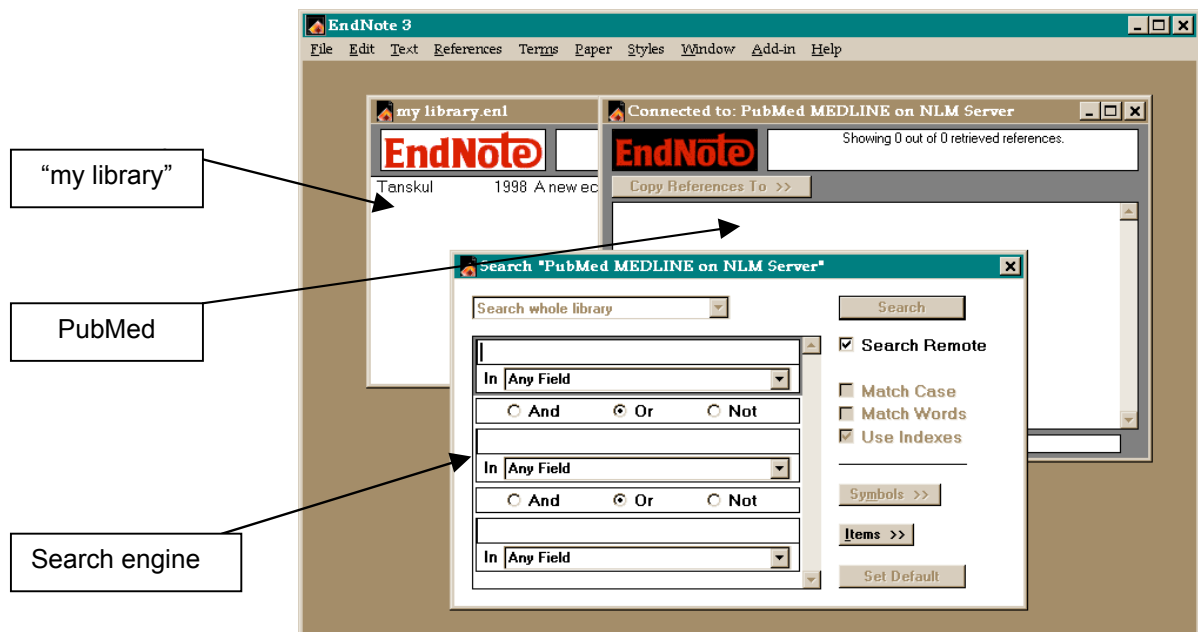


Using EndNote™

In this window, you will see a connection to PubMed (NLM), a free MEDLINE available directly from the National Library of Medicine (your tax dollars hard at work). Double click on that file.

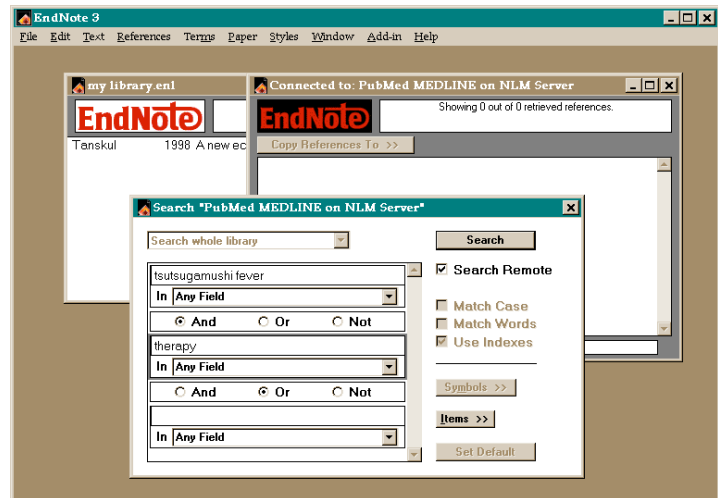


Stuff just happened. Two new windows opened and in the background you will also see “my library” with its lonely reference. One of the windows should look remarkably to the one you used for searching the reference library in the previous module. The other window shows that you are connected to PubMed.

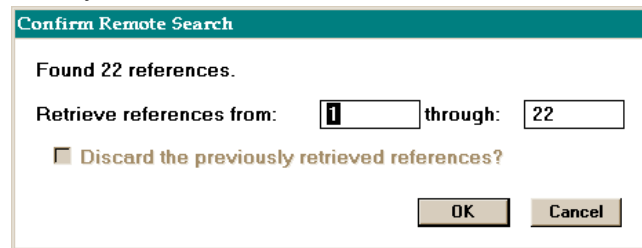


Searching remote databases

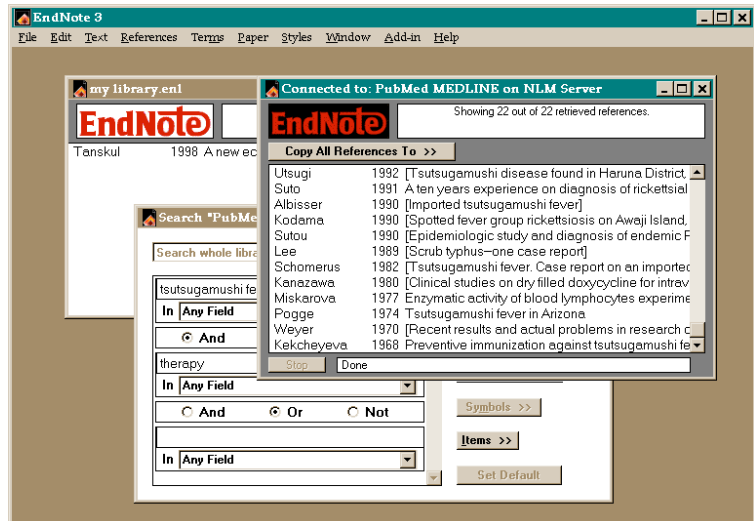
We can use the search engine to do a search like we might if we directly in PubMed. On the first line in the search engine window, type “tsutsugamushi fever”. On the second line, type “therapy”. Now, you have to look closely. Between the first and second line are three little buttons with three little words. Don’t be fooled by their size. These are powerful words and buttons! The default is for EndNote to do an “or” search. In this case, we want articles related to treatment of tsutsugamushi fever, so we need to do an “and” search. Click on the button to the left of the word “And”.



Now click on the button labeled “Search.” EndNote will tell you what it found.



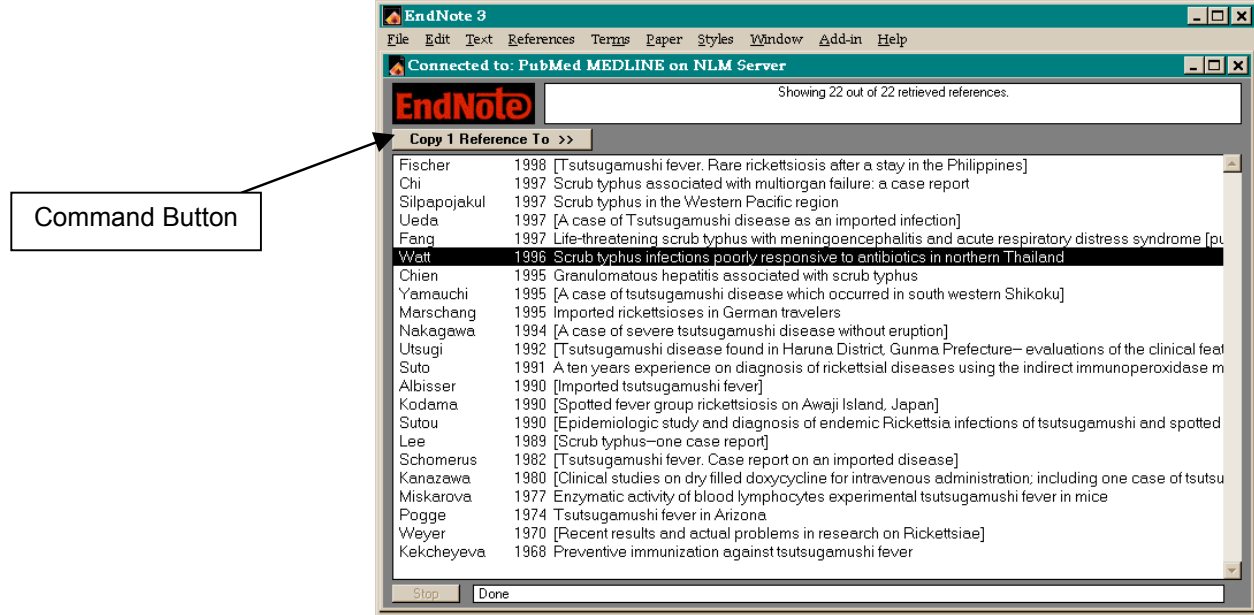
Since this looks like a manageable number, click on “OK.” EndNote will take you to the PubMed window. At first, it will be blank, but after a few seconds, the references will roll in.



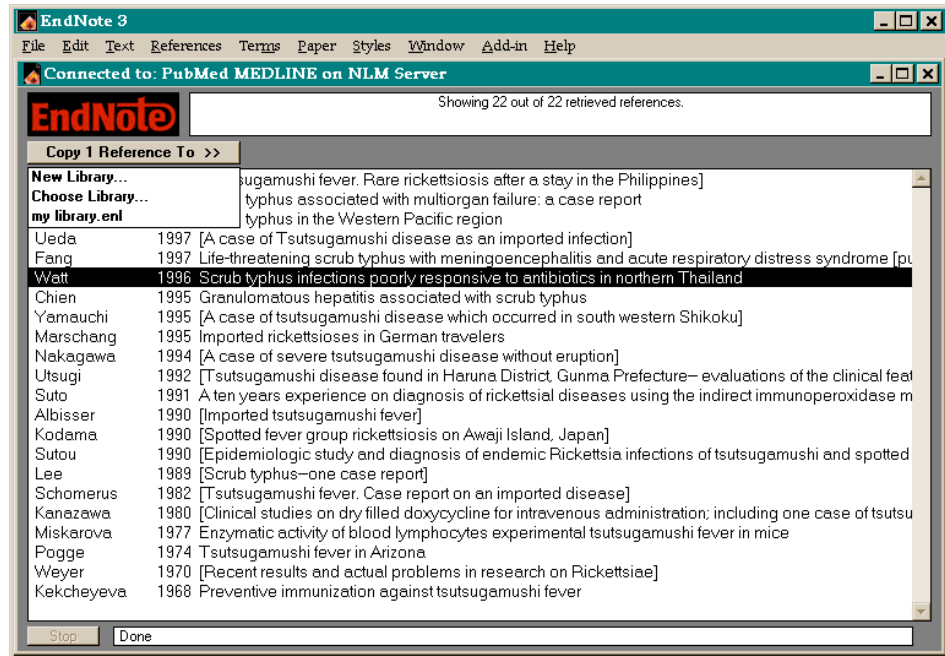
At this point, you can open a citation as we did earlier and view its contents and abstract.

Import results into EndNote

OR, you can import it into EndNote. If you wanted, you could also import them all into EndNote. Before doing anything, take a look at the command bar. It should say, "Copy All References To >>". This will change automatically in just a moment. Now, scroll the references and look at the titles. You might find it easier if you maximize the window. One of the references, by Watt in 1996, looks particularly interesting. Click on it once to highlight it.

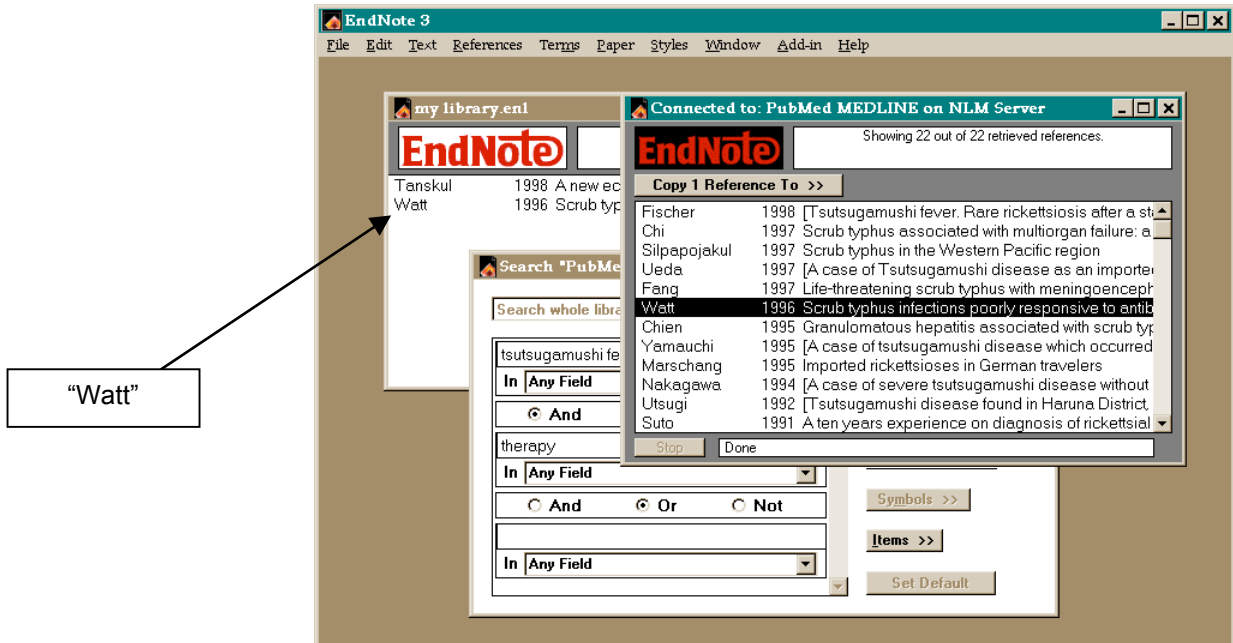


Notice the change in the command button! Go ahead, click on it! A menu of options drops down, prompting you for the name of the library where you want Watt to go: a new library, an existing library, or one that is already open.

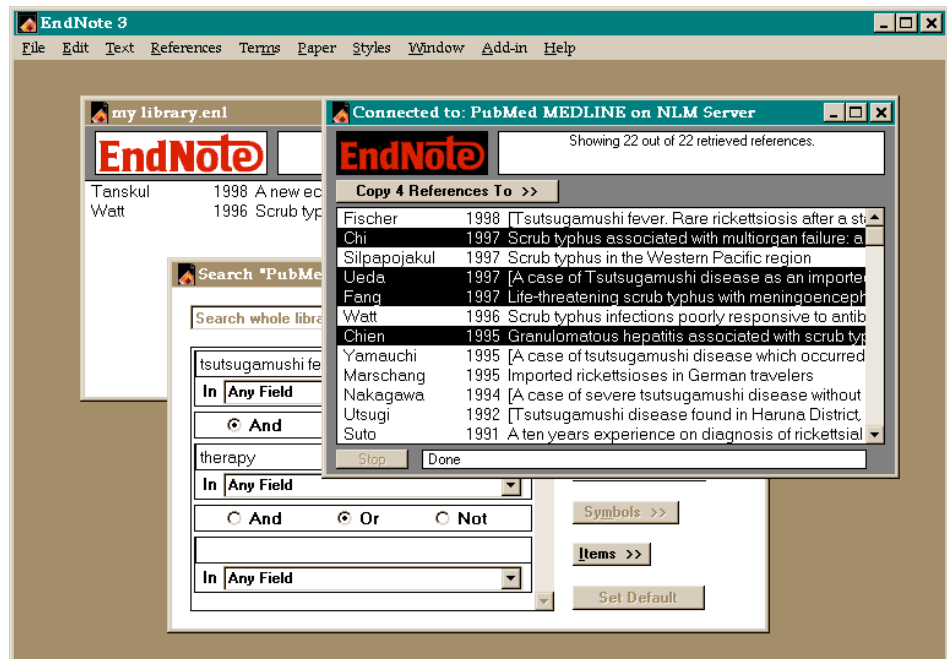


Using EndNote™

Click on “my library.enl”. If you maximized the Window, you might have seen nothing and are wondering, what the big deal is about. Trust me. Minimize the window and, there in the background, you will see “my library” with Watt as the second reference!



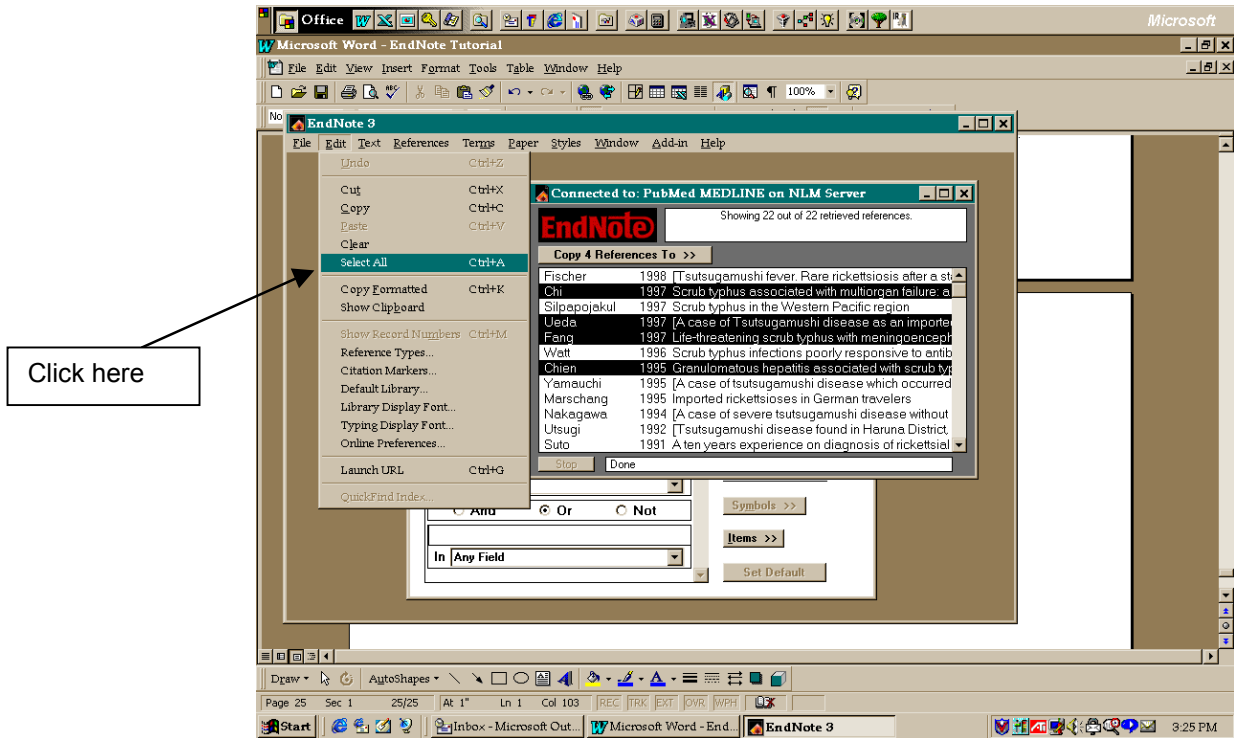
If you want to import all the references into EndNote, you can click on each citation one by one, as we did with Watt. You could also hold the “Ctrl” key and click on individual references. Try it.



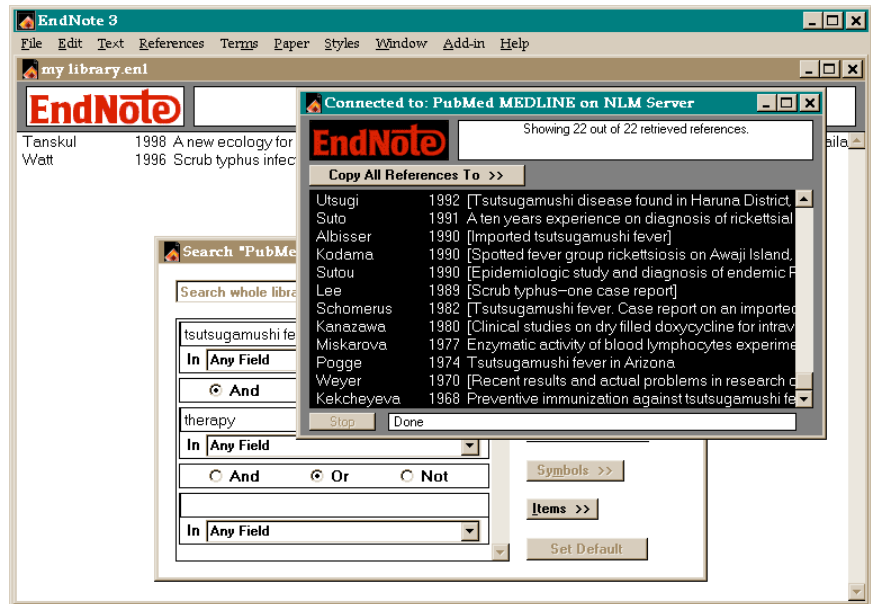
In this window, 4 references are highlighted and the command button says, “Copy 4 references To >>”. Just like we did before, you can copy these into “my library”. You could keep doing this (hold the “Ctrl” key and click) until all the references are highlighted and then copy them into my library.

Using EndNote™

If you wanted to copy all the references, you could also use the menu bar. Click on “Edit|Select All”.



All the references will be highlighted and the command button will again change, allowing you to copy all the references into EndNote.



Congratulations! You have finished the EndNote module.

Practice Exercises

Now that you have finished the EndNote™ tutorial, it's time to practice some of the skills you have learned today.

Using the library you created today, import new references into it.

1. You have been asked by students for a list of references related to the treatment of eating disorders, your area of research. Use the PubMed database to retrieve and import references into your library for a later printout.
2. Think of your area of expertise or specialty. Do another PubMed search on a topic of interest to you. If you feel uncomfortable, create a brand NEW library and import the results into it. Remember to save all created libraries and subsequent work to the Desktop.