

INSTRUCTION GUIDE

EndNote Bibliographic Management Software Manage Your Information

George Mason University Libraries

What is EndNote used for?

- Storing, organizing and managing bibliographic information about your research in a personal EndNote Library for long term access and use
- Easily formatting citations and works cited lists in a Microsoft Word document according to any of the over 1,000 citation styles available in the EndNote software
- Creating special subject bibliographies

How do I get Endnote?

George Mason University has a site license agreement for EndNote software that allows installation on the computers of people who are enrolled or employed at George Mason. **Note: EndNote 10 is now available. EndNote Libraries converted to or created in EndNote 10 cannot be used with EndNote 9 software.** EndNote software is available by:

1. Downloading from the web at <https://chimera.gmu.edu/endnote/prod/>.

OR

2. Purchasing the software on CD from Patriot Computers in the JC for the cost of making the copy to disc.

Brief EndNote Glossary

Connection File – File that contains information necessary for EndNote to communicate with remote databases. These databases, from time to time, change their Connection File information requiring you to update the Connection File in the EndNote folder on your computer. The correct Connection File for George Mason's University Libraries can be downloaded at <http://library.gmu.edu/endnote/downloads.htm>.

Import Filter – File that contains information about specific databases EndNote uses to import bibliographic data into the correct fields in your EndNote Library. This is necessary because not all databases follow the same structures, patterns and formats for organizing bibliographic information about sources.

Keyword – This term commonly refers to terms you type into a database to be searched. EndNote uses this term to refer to the field in a reference that contains Subject Headings (sometimes called Descriptors or Identifiers) that identify or describe the content of the source.

Library – Term used to refer to your EndNote database of references

Output Style – Term used to identify the citation formats (APA, MLA, Chicago, etc.) available in EndNote.

Options for adding bibliographic references to your EndNote Library

<u>Entering Manually</u> <i>EndNote Chapter: Entering and Editing References</i>	<u>Retrieving references from remote databases</u> <i>EndNote Chapter: Searching Remote Databases with EndNote</i>	<u>Exporting references into your EndNote Library (called Direct Export)</u> <i>EndNote Chapter: Importing Reference Data into EndNote</i>
Most reliable because you are inputting the information yourself.	Allows searching remote databases using the EndNote software and retrieving references directly into your EndNote Library.	Searching online databases at their Web site, then sending references directly to your EndNote library. This option is supported by relatively few, but very popular, databases.

Creating an EndNote Library and Adding References *EndNote Chapter: Introducing the EndNote Library*

1. Launch EndNote and choose **Create a New EndNote Library**.
2. Give your library a name in the **File name** box.
3. Select where on your computer you want to save your EndNote Library with the Save in box. The default location is in the EndNote folder in Program Files folder on your C drive.
4. Add a reference by choosing **New Reference** from the **References** pull-down menu.
5. Select the reference type that corresponds to the source you want to include in your EndNote Library from the **Reference Type** pull-down menu.
6. Enter the bibliographic information from your source into the appropriate fields. See *EndNote chapter: Entering and Editing References* for specific field formatting (author, title, etc.).
7. Close the reference (closing the reference saves it in your EndNote Library).
8. Select an Output Style from the pull-down options near the top of the screen. Hint: Keep the **Show Preview** option at the bottom of your EndNote Library screen open so you can see if your records are correctly formatted.

Access and Search Remote Library Catalogs in Order to Retrieve References into your EndNote Library *EndNote Chapter: Searching Remote Databases with EndNote*

*This requires a connection to the World Wide Web and the most recent Mason Libraries Connection File.

1. From the **Tools** pull-down menu select **Connect** and select **Connect** again to open the **Choose a Connection** window.
2. Select the library catalog you wish to connect to and click the **Connect** button to open a connection to the catalog and launch an EndNote search window.
3. Enter terms to be searched in the remote library catalog in the boxes. Combine terms with AND. EndNote displays the number of retrieved references in a **Confirm Remote Search** window so you may judge if your search needs to be expanded or narrowed.
4. Click **OK** and EndNote places the references in a temporary holding place called the **Retrieved Reference Window** so you can evaluate the search results before adding references to your EndNote Library.
5. As you select references from your list of results, the number in the **Copy Reference(s) To** button increases to reflect the number that will be added to your EndNote Library. HINT: keep the Show Preview button in your **Retrieved Reference Window** open so you can check the reference(s) before you copy them to your EndNote library.
6. Once you've selected the references you want in your EndNote Library, click on the **Copy Reference(s) To** button.

Access and Search Commercial Bibliographic databases in order to Export References into your EndNote Library *EndNote Chapter: Importing Reference Data into EndNote*

Note: Some commercial databases work with EndNote to allow you to send (Direct Export) references to your EndNote Library. Import Filters are used during this process, and you may be asked to select the correct filter for the database you are retrieving the references from. Databases often have different interfaces from their competitors, so the Export option will vary from database to database.

1. Access commercial databases through University Libraries Home page (<http://library.gmu.edu>).
2. Conduct your search then select the references you wish to have in your EndNote Library.
3. Select the Export option. **NOTE:** Look for options that allow for some flexibility in what to include in your EndNote Library.
4. A) A dialog box appears allowing you to select which EndNote Library you wish to send the selected references to. **OR**
B) A dialog box appears requesting you to select the appropriate Filter for the database you are retrieving the references from.

Cite While You Write *EndNote Chapter: Using EndNote with Microsoft Word*

1. Open your Word document.
 2. Position the cursor where you wish to place a citation.
 3. From the **Tools** pull-down menu go to **EndNote** and click on **Go To EndNote**. This launches or takes you to EndNote (if it is already open), so you can open your Library.
 4. Select the **Output Style** appropriate for your document.
 5. Highlight the reference you wish to insert into your document.
 6. From the **Tools** pull-down menu in EndNote, select **Cite While You Write** and click on **Insert Selected Citation(s)**. EndNote will insert the reference into your document at the location of your cursor and begin listing your works cited at the end of your document.
- **NOTE:** Do not edit the citations or works cited list directly using Word. You must use the EndNote functions in Word or your changes will not be saved. See *EndNote chapter: Using EndNote with Microsoft Word – Editing Citations.*

Finding Support

- The EndNote manual comes with the software, whether you download or use the CD copy, and can be found as a PDF in the EndNote folder on your computer.
- While EndNote is running, select Help from the EndNote toolbar.
- <http://library.gmu.edu/endnote/>. Click EndNote Support. Click the Online Help link to access the George Mason EndNote Knowledge Base.
- <http://www.endnote.com/> (click on **support & services**)