

# Basic Skills to Endnote

October 2009

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# Outline

- Advantages
- Basic configuration
- Keeping a good library when writing a thesis
- Adjusting the style

# Advantages

- Once you define your own style (e.g. adjust Harvard) – never worry again about formatting your citations and bibliography
- EndNote lets you cite any work you have in your EndNote library effortlessly and keeps the list of references the way you want on the last page of your Word file.
- Good way of keeping things you have read organized and quickly accessible

# Basics

- Start Endnote: Start -> LJMU Applications -> Subject Software -> General and Computing -> EndnoteX2 -> Microsoft Word 2007 with Endnote Extensions
- In Word 2007 -> EndnoteX2 -> Go to Endnote

# Basics

- In Endnote -> File -> New... -> .enl library
- This will be location of your library file from now on. Whenever you open Endnote again, it should be open automatically.

# Basics

The screenshot displays a reference management application with a menu bar (File, Edit, References, Groups, Tools, Window, Help) and a toolbar. The main window is divided into a left sidebar and a central table.

**Left Sidebar (Groups):**

- All References (77)
- Trash (1)
- Custom Groups
- Smart Groups
- Online Search
  - Library of Congress (0)
  - LISTA (EBSCO) (0)
  - PubMed (NLM) (0)
  - Web of Science (TS) (0)
  - more...
- EndNote Web
  - configure...

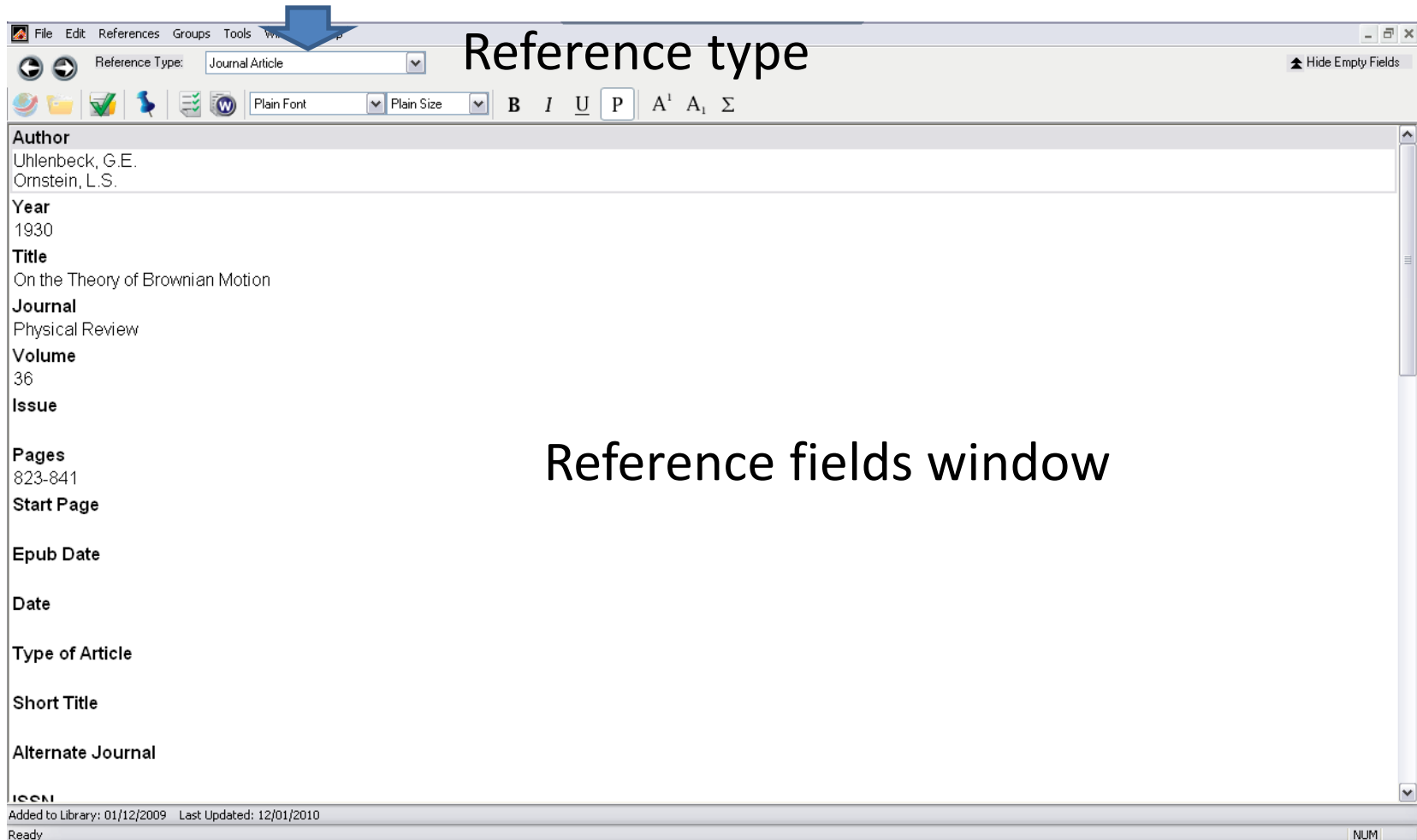
**Central Table (References):**

Author	Year	Title	Journal	Ref Type	URL	Last Updated
Bachelier	1900	Theory of speculation	Annales Sc...	Journal Arti...		23/10/2009
Uhlenbeck	1930	On the Theory of Brownian Motion	Physical Re...	Journal Arti...		12/01/2010
Fama	1965	The Behaviour of Stock Market Prices	Journal of B...	Journal Arti...		23/10/2009
Sharpe	1970	Portfolio Theory and Capital Markets		Book		20/10/2009
Ross	1976	The Arbitrage Theory of Capital Ass...	Journal of E...	Journal Arti...		23/02/2010
French	1980	Stock Returns and the Weekend Effect	Journal of F...	Journal Arti...		26/10/2009
Harvey	1981	Time Series Models		Book		29/11/2009
Said	1984	Testing for Unit Roots in Autoregress...	Biometrika	Journal Arti...		26/10/2009
Jolliffe	1986	Principal Component Analysis		Book		01/12/2009
Engle	1987	Co-integration and Error Correction	Econometri...	Journal Arti...		12/01/2010
Johansen	1988	Statistical Analysis of Cointegration ...	Journal of E...	Journal Arti...		29/11/2009
Lo	1988	Stock Market Prices Do Not Follow ...	The Review...	Journal Arti...		12/01/2010
Goldberg	1989	Genetic Algorithms in Search, Optimi...		Book		13/01/2010
Conn	1991	A Global Convergence Algorithm	SIAM Journ...	Journal Arti...		13/01/2010
Haldane	1991	Sterling's Relationship with the Dollar...	Economic J...	Journal Arti...		29/11/2009
Fama	1992	The Cross-Section of Expected Stoc...	The Journal...	Journal Arti...		26/10/2009
Efron	1993	An Introduction to the Bootstrap		Book		14/01/2010
Hamilton	1994	Time Series Analysis		Book		29/11/2009
Sharpe	1994	The Sharpe Ratio	Journal of P...	Journal Arti...		26/10/2009
Burgess	1996	Asset Allocation Across European E...	Decision T...	Book Section		26/10/2009
Gillespie	1996	Exact Numerical Simulation of the Or...	Physical Re...	Journal Arti...		12/01/2010
JPMorgan	1996	RiskMetrics	Technical D...	Book		09/11/2009
Fung	1997	Empirical Characteristics of Dynami...	The Review...	Journal Arti...		13/01/2010
Serletis	1997	Common Stochastic Trends and Con...	Manchester...	Journal Arti...		01/12/2009
Brooks	1998	Time-Varying Beta Risk of Australian...	Australian J...	Journal Arti...		11/12/2009
Dimson	1998	A Brief History of Market Efficiency a...	European F...	Journal Arti...	http://ssrn.com/pap...	26/10/2009

**Output window (Preview):**

Ross, S. A. (1976). "The Arbitrage Theory of Capital Asset Pricing." *Journal of Economic Theory* 13: 341-360.

# Library – adding new references



The screenshot shows a software window titled 'Reference type' with a dropdown menu set to 'Journal Article'. Below the menu is a toolbar with icons for file operations and text formatting (Bold, Italic, Underline, Paragraph, Superscript, Subscript, Sum). The main area is a 'Reference fields window' with the following fields:

- Author**: Uhlenbeck, G.E.  
Ornstein, L.S.
- Year**: 1930
- Title**: On the Theory of Brownian Motion
- Journal**: Physical Review
- Volume**: 36
- Issue**
- Pages**: 823-841
- Start Page**
- Epub Date**
- Date**
- Type of Article**
- Short Title**
- Alternate Journal**
- ISSN**

At the bottom, there is a status bar with the text: 'Added to Library: 01/12/2009 Last Updated: 12/01/2010' and 'Ready' on the left, and 'NUM' on the right.

# Library – adding new references

- Right click in the references window and from the menu that appears select: New reference
- Fill in Reference Type AND Author/s, Year, Title, Journal, Volume, Issue, Pages (e.g. 122-135), URL
- Very good thing to do is to keep pdf file of the article in the library: click on the window where you edit Author..., and in the menu select File Attachments -> Attach File
- When done editing, close the small window, and click Yes on Saving changes.



# Library references – Reference Type

- Do not be put off by hundred or so different Reference Types. The only reference types I ever used are: Journal Article, Electronic article (if e.g. not published and only accessible via ssrn), Book, Thesis, Conference Proceedings, Book section, Edited Book, Web page

# Library – editing references

- You can always get back to changes by double clicking the reference in the References window
- You can also attach more files to 1 reference if you wish.

# Library – keeping things organized

- In this way you have all the references in 1 place tied to the original article in 1 click
- All are organized neatly. In the References window you can sort your bibliography based on Year, Name of the Author, ...

# Style

- When any reference is highlighted in a References window, Output window shows how the actual citation in your thesis will look.
- You can change this, save changes, and not worry about remembering how the bibliography part of your thesis should look.

# Style - basics

- First have a look where your style configuration file will be saved.
- Go to Edit -> Preferences -> Folder Locations

# Style - basics

Folder where you style configuration will be saved

The screenshot displays the EndNote application interface. On the left, a sidebar shows a tree view of 'Groups' including 'All References (77)', 'Trash (1)', 'Custom Groups', 'Smart Groups', 'Online Search' (with sub-items like 'Library of Congress (0)', 'LISTA (EBSCO) (0)', 'PubMed (NLM) (0)', 'Web of Science (TS) (0)', and 'more...'), and 'EndNote Web'. The main window shows a list of references with columns for Author, Year, Title, Journal, Ref Type, URL, and Last Updated. A 'EndNote Preferences' dialog box is open in the center, with the 'Folder Locations' section selected in the left-hand menu. This section contains three fields: 'Style Folder' (set to 'UDY\Dropbox\My Dropbox\EndNote\Styles'), 'Filter Folder' (set to 'C:\Documents and Settings\BLW\JRUDY\D'), and 'Connections Folder' (set to 'C:\Documents and Settings\BLW\JRUDY\D'). A blue arrow points to the 'Style Folder' field. At the bottom of the dialog are buttons for 'EndNote Defaults', 'Revert Panel', 'OK', 'Cancel', and 'Apply'. Below the dialog, a 'Preview' pane shows a search result for 'Uhlenbeck, G. E. and Ornstein, L. S. (1930) On the Theory of Brownian Motion. *Physical Review*. 36, 823-841.'

# Style – adjusting style

- We need to make changes to the default style
- We will start by editing Harvard style
- Go to Edit -> Output Styles -> Open Style Manager
- Find and check Harvard. Click x to exit.

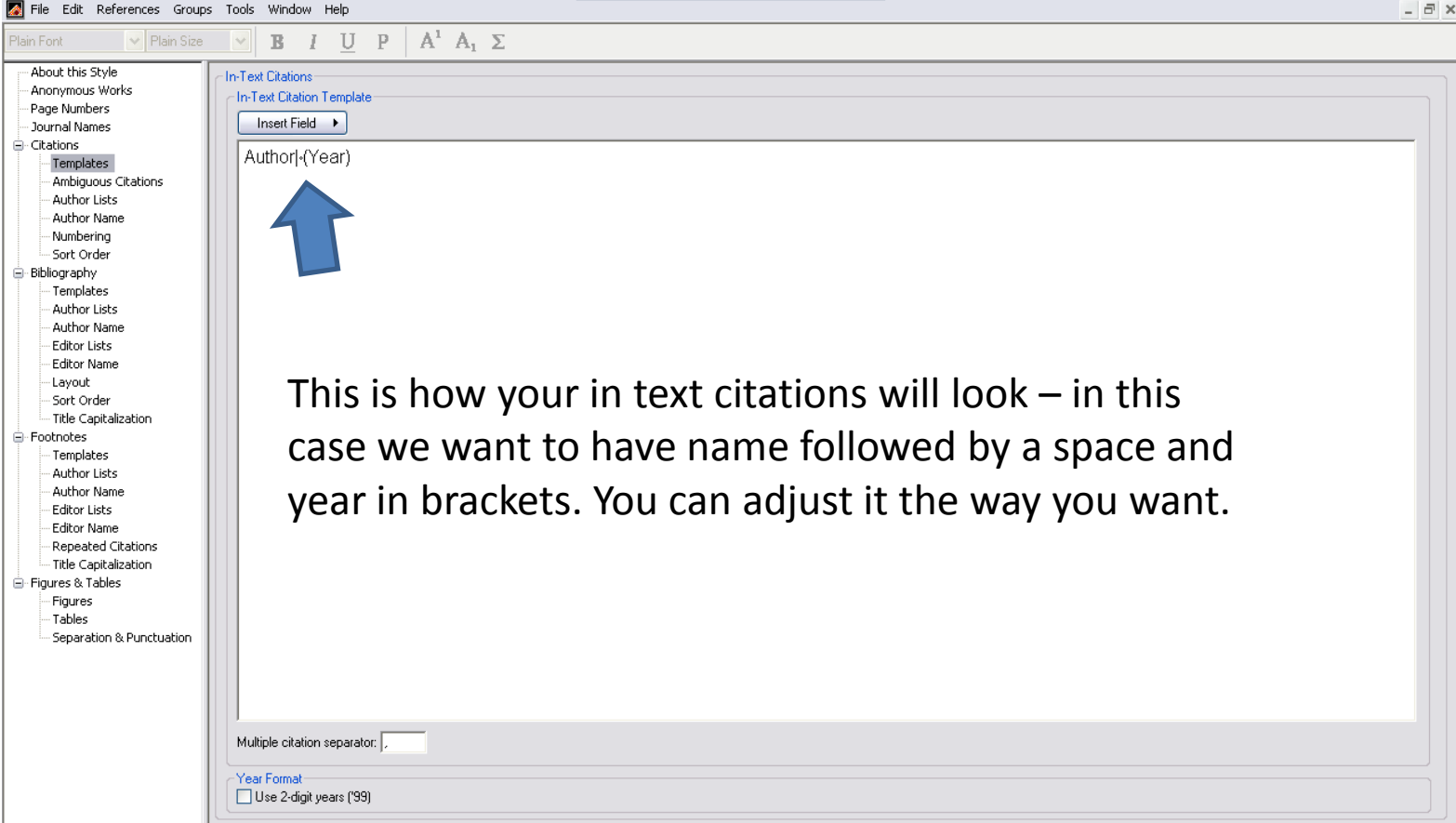
# Style – adjusting style

The screenshot shows the EndNote application window. The 'Output Styles' menu is open, and 'Edit "Jozef Harvard"' is selected. A blue arrow points to this option. The main window displays a list of references with columns for Author, Year, Title, Journal, Ref Type, URL, and Last Updated. The reference for Uhlenbeck, G. E. and Ornstein, L. S. (1930) is highlighted. A preview window at the bottom shows the citation text: 'Uhlenbeck, G. E. and Ornstein, L. S. (1930) On the Theory of Brownian Motion. *Physical Review*. 36, 823-841.'

Author	Year	Title	Journal	Ref Type	URL	Last Updated
Bachelier	1900	Theory of speculation	Annales Sc...	Journal Arti...		23/10/2009
Uhlenbeck	1930	On the Theory of Brownian Motion	Physical Re...	Journal Arti...		12/01/2010
Uhlenbeck	1966	The Behavior of Stock Markets	Journal of F...	Journal Arti...		23/10/2009
Sharpe	1970	Portfolio Theory and Capital Markets		Book		20/10/2009
Boss	1976	The Arbitrage Theory of Capital Ass...	Journal of E...	Journal Arti...		23/02/2010
French	1980	Stock Returns and the Weekend Effect	Journal of F...	Journal Arti...		26/10/2009
Granger	1981	Time Series Models		Book		29/11/2009
Granger	1984	Testing for Unit Roots in Autoregress...	Biometrika	Journal Arti...		26/10/2009
Granger	1986	Principal Component Analysis		Book		01/12/2009
Granger	1987	Co-integration and Error Correction: ...	Econometri...	Journal Arti...		12/01/2010
Granger	1988	Statistical Analysis of Cointegration ...	Journal of E...	Journal Arti...		29/11/2009
Granger	1988	Stock Market Prices Do Not Follow ...	The Review...	Journal Arti...		12/01/2010
Granger	1989	Genetic Algorithms in Search, Optimi...		Book		13/01/2010
Granger	1991	A Globally Convergent Augmented L...	SIAM Journ...	Journal Arti...		13/01/2010
Granger	1991	Sterling's Relationship with the Dollar...	Economic J...	Journal Arti...		29/11/2009
Granger	1992	The Cross-Section of Expected Stoc...	The Journal...	Journal Arti...		26/10/2009
Granger	1993	An Introduction to the Bootstrap		Book		14/01/2010
Granger	1994	Time Series Analysis		Book		29/11/2009
Hamilton	1994	The Sharpe Ratio	Journal of P...	Journal Arti...		26/10/2009
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JPMorgan	1996	RiskMetrics	Technical D...	Book		09/11/2009
Fung	1997	Empirical Characteristics of Dynam...	The Review...	Journal Arti...		13/01/2010
Serletis	1997	Common Stochastic Trends and Con...	Manchester...	Journal Arti...		01/12/2009
Brooks	1998	Time-Varying Beta Risk of Australian...	Australian J...	Journal Arti...		11/12/2009
Dimson	1998	A Brief History of Market Efficiency a...	European F...	Journal Arti...	http://ssrn.com/pap...	26/10/2009



# Style – adjusting style



The screenshot shows a citation style editor window. The left sidebar contains a tree view with categories: About this Style, Anonymous Works, Page Numbers, Journal Names, Citations (expanded), Bibliography, Footnotes, and Figures & Tables. Under 'Citations', 'Templates' is selected. The main area is titled 'In-Text Citations' and contains an 'In-Text Citation Template' section with an 'Insert Field' button. Below this, the template 'Author|(Year)' is displayed, with a blue arrow pointing to the vertical bar between the author name and the year. At the bottom, there is a 'Multiple citation separator' field containing a comma and a space, and a 'Year Format' section with a checkbox for 'Use 2-digit years (99)'.

Author|(Year)

This is how your in text citations will look – in this case we want to have name followed by a space and year in brackets. You can adjust it the way you want.

Multiple citation separator: ,

Year Format  
 Use 2-digit years (99)

# Style – adjusting style

File Edit References Groups Tools Window Help

Plain Font Plain Size **B** *I* U P A<sup>1</sup> A<sub>1</sub> Σ

About this Style  
Anonymous Works  
Page Numbers  
Journal Names  
Citations  
  Templates  
  Ambiguous Citations  
  Author Lists  
  Author Name  
  Numbering  
  Sort Order  
Bibliography  
  Templates  
  Author Lists  
  Author Name  
  Editor Lists  
  Editor Name  
  Layout  
  Sort Order  
  Title Capitalization  
Footnotes  
  Templates  
  Author Lists  
  Author Name  
  Editor Lists  
  Editor Name  
  Repeated Citations  
  Title Capitalization  
Figures & Tables  
  Figures  
  Tables  
  Separation & Punctuation

**Author Separators**  
Number of Authors between before last  
1 to 100 and  
100 to 100 and

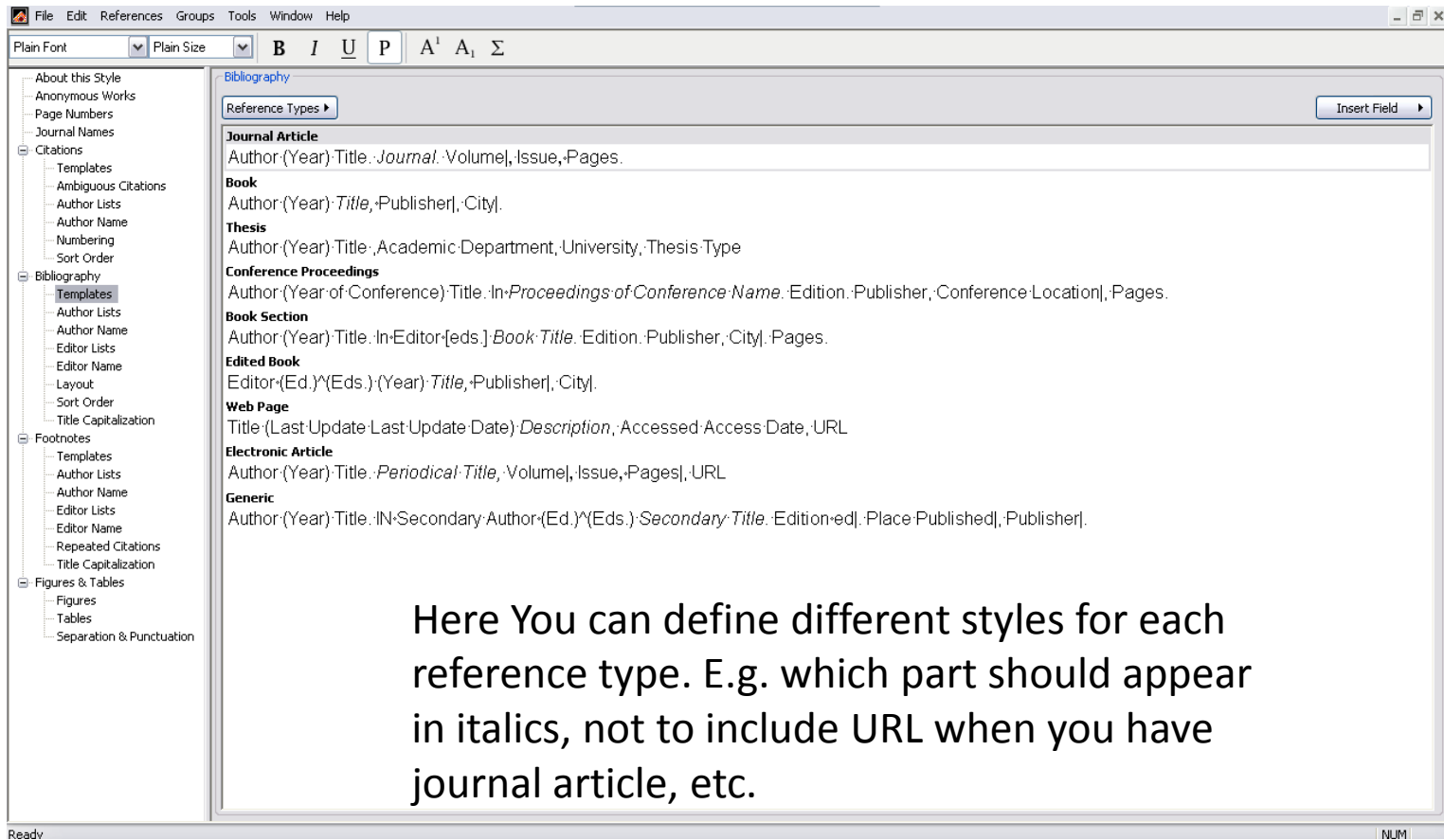
**Abbreviated Author List - First Appearance**  
 List all author names  
 If 3 or more authors, list the first 1 author(s)  
and abbreviate with: et al.  Italic

**Abbreviated Author List - Subsequent Appearances**  
 List all author names  
 If 3 or more authors, list the first 1 author(s)  
and abbreviate with: et al.  Italic

Here, if your citation contains more than 2 authors, you might want to have *et al.* in italics

Ready NUM

# Style – adjusting style



File Edit References Groups Tools Window Help

Plain Font Plain Size B I U P A<sup>1</sup> A<sub>1</sub> Σ

About this Style  
Anonymous Works  
Page Numbers  
Journal Names  
Citations  
- Templates  
- Ambiguous Citations  
- Author Lists  
- Author Name  
- Numbering  
- Sort Order  
Bibliography  
- **Templates**  
- Author Lists  
- Author Name  
- Editor Lists  
- Editor Name  
- Layout  
- Sort Order  
- Title Capitalization  
Footnotes  
- Templates  
- Author Lists  
- Author Name  
- Editor Lists  
- Editor Name  
- Repeated Citations  
- Title Capitalization  
Figures & Tables  
- Figures  
- Tables  
- Separation & Punctuation

Bibliography

Reference Types ▶ Insert Field ▶

**Journal Article**  
Author (Year) Title . *Journal* . Volume | Issue , Pages .

**Book**  
Author (Year) Title , Publisher | City |.

**Thesis**  
Author (Year) Title . Academic Department , University , Thesis Type

**Conference Proceedings**  
Author (Year of Conference) Title . In *Proceedings of Conference Name* . Edition . Publisher , Conference Location | , Pages .

**Book Section**  
Author (Year) Title . In Editor [eds.] *Book Title* . Edition . Publisher , City | . Pages .

**Edited Book**  
Editor (Ed.) (Eds.) (Year) Title , Publisher | , City |.

**Web Page**  
Title (Last Update - Last Update Date) *Description* , Accessed Access Date , URL

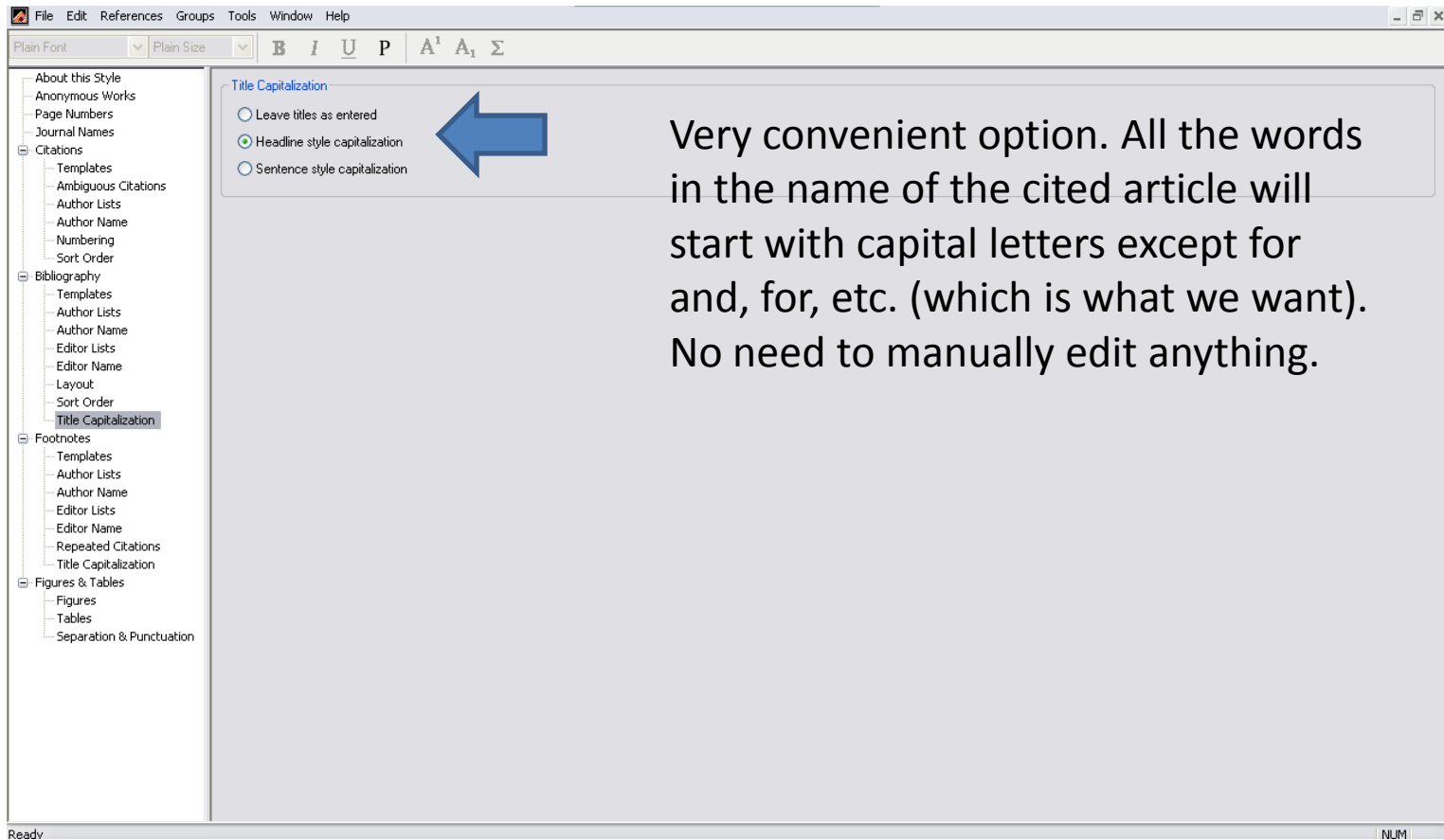
**Electronic Article**  
Author (Year) Title . *Periodical Title* , Volume | Issue , Pages | , URL

**Generic**  
Author (Year) Title . IN Secondary Author (Ed.) (Eds.) *Secondary Title* . Edition = ed | . Place Published | , Publisher |.

Ready NUM

Here You can define different styles for each reference type. E.g. which part should appear in italics, not to include URL when you have journal article, etc.

# Style – adjusting style



The screenshot shows a software window with a menu bar (File, Edit, References, Groups, Tools, Window, Help) and a toolbar with icons for Bold (B), Italic (I), Underline (U), Paragraph (P), and text alignment (A¹, A₁, Σ). A left-hand pane contains a tree view of style categories: About this Style, Anonymous Works, Page Numbers, Journal Names, Citations, Bibliography, Footnotes, and Figures & Tables. The 'Footnotes' category is expanded, and 'Title Capitalization' is selected. The main area displays three radio button options: 'Leave titles as entered', 'Headline style capitalization', and 'Sentence style capitalization'. A blue arrow points to the 'Headline style capitalization' option. The status bar at the bottom shows 'Ready' and 'NUM'.

**Title Capitalization**

- Leave titles as entered
- Headline style capitalization
- Sentence style capitalization

Very convenient option. All the words in the name of the cited article will start with capital letters except for and, for, etc. (which is what we want). No need to manually edit anything.

# Style

- Once you have edited everything, no need to worry about formal side of citations any more.
- Now, go to Endnote and highlight any reference.
- Switch to Word 2007 and click Alt+F2. Note how the citation appeared + reference in proper formatting.

The End